

# Apparel and Footwear in Morocco

December 2024

**Table of Contents** 

## Apparel and Footwear in Morocco

#### **EXECUTIVE SUMMARY**

Apparel and footwear in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

#### MARKET DATA

- Table 1 Sales of Apparel and Footwear by Category: Volume 2019-2024
- Table 2 Sales of Apparel and Footwear by Category: Value 2019-2024
- Table 3 Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024
- Table 4 Sales of Apparel and Footwear by Category: % Value Growth 2019-2024
- Table 5 NBO Company Shares of Apparel and Footwear: % Value 2020-2024
- Table 6 LBN Brand Shares of Apparel and Footwear: % Value 2021-2024
- Table 7 Distribution of Apparel and Footwear by Format: % Value 2019-2024
- Table 8 Distribution of Apparel and Footwear by Format and Category: % Value 2024
- Table 9 Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029
- Table 10 Forecast Sales of Apparel and Footwear by Category: Value 2024-2029
- Table 11 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029
- Table 12 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

#### DISCLAIMER

#### **SOURCES**

Summary 1 - Research Sources

# Childrenswear in Morocco

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Parents are still feeling economic pressures

Moroccan parents prefer to buy durable apparel and footwear

Childrenswear sharing among families gains momentum

## PROSPECTS AND OPPORTUNITIES

Waning birth rates will continue to pose a notable challenge

Challenging period ahead for childrenswear

Growing appeal of unisex childrenswear in Morocco

#### **CATEGORY DATA**

- Table 13 Sales of Childrenswear by Category: Volume 2019-2024
- Table 14 Sales of Childrenswear by Category: Value 2019-2024
- Table 15 Sales of Childrenswear by Category: % Volume Growth 2019-2024
- Table 16 Sales of Childrenswear by Category: % Value Growth 2019-2024
- Table 17 NBO Company Shares of Childrenswear: % Value 2020-2024
- Table 18 LBN Brand Shares of Childrenswear: % Value 2021-2024
- Table 19 Forecast Sales of Childrenswear by Category: Volume 2024-2029
- Table 20 Forecast Sales of Childrenswear by Category: Value 2024-2029
- Table 21 Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029
- Table 22 Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

## Apparel Accessories in Morocco

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Climate change impacts sales of apparel accessories

Working from home trend continues to hamper sales

Surge in preference for economy-priced apparel accessories

## PROSPECTS AND OPPORTUNITIES

Apparel accessories will suffer from non-essential status

Moroccan demand for ties to remain weak due to the casual attire trend

Embracing natural fibres in apparel accessories

#### **CATEGORY DATA**

Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024

Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

#### Menswear in Morocco

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Steady growth in affordable menswear items

Growth of certain menswear categories slows down amid economic uncertainty

Long shorts are making a remarkable comeback

## PROSPECTS AND OPPORTUNITIES

Balancing comfort with the need for professionalism

Discounts will remain key to generating sales amongst price-conscious consumers

Sustainable fashion will likely grow in prominence

# **CATEGORY DATA**

Table 33 - Sales of Menswear by Category: Volume 2019-2024

Table 34 - Sales of Menswear by Category: Value 2019-2024

Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024

Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024

Table 37 - NBO Company Shares of Menswear: % Value 2020-2024

Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024

Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

- Table 46 LBN Brand Shares of Men's Underwear: % Value 2021-2024
- Table 47 Forecast Sales of Menswear by Category: Volume 2024-2029
- Table 48 Forecast Sales of Menswear by Category: Value 2024-2029
- Table 49 Forecast Sales of Menswear by Category: % Volume Growth 2024-2029
- Table 50 Forecast Sales of Menswear by Category: % Value Growth 2024-2029

## Womenswear in Morocco

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Womenswear posts solid volume growth

Price is key factor in purchasing decision

Private label lines thrive in womenswear

#### PROSPECTS AND OPPORTUNITIES

Sportswear to increase in popularity among Moroccan woman

Promotions required to support needs of Moroccan women

Sustainability will become a key focus

#### **CATEGORY DATA**

- Table 51 Sales of Womenswear by Category: Volume 2019-2024
- Table 52 Sales of Womenswear by Category: Value 2019-2024
- Table 53 Sales of Womenswear by Category: % Volume Growth 2019-2024
- Table 54 Sales of Womenswear by Category: % Value Growth 2019-2024
- Table 55 NBO Company Shares of Womenswear: % Value 2020-2024
- Table 56 LBN Brand Shares of Womenswear: % Value 2021-2024
- Table 57 NBO Company Shares of Women's Nightwear: % Value 2020-2024
- Table 58 LBN Brand Shares of Women's Nightwear: % Value 2021-2024
- Table 59 NBO Company Shares of Women's Outerwear: % Value 2020-2024
- Table 60 LBN Brand Shares of Women's Outerwear: % Value 2021-2024
- Table 61 NBO Company Shares of Women's Swimwear: % Value 2020-2024
- Table 62 LBN Brand Shares of Women's Swimwear: % Value 2021-2024
- Table 63 NBO Company Shares of Women's Underwear: % Value 2020-2024
- Table 64 LBN Brand Shares of Women's Underwear: % Value 2021-2024
- Table 65 Forecast Sales of Womenswear by Category: Volume 2024-2029
- Table 66 Forecast Sales of Womenswear by Category: Value 2024-2029
- Table 67 Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029
- Table 68 Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

## Jeans in Morocco

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Economy jeans dominate amid economic challenges

Moroccan men invest in higher quality jeans

High-waisted jeans for women are the new must-have

### PROSPECTS AND OPPORTUNITIES

Discounts and promotions will drive purchasing behaviour

Private label is set to improve share in jeans

Jeans producers to roll out more sustainable jeans

#### **CATEGORY DATA**

- Table 69 Sales of Jeans by Category: Volume 2019-2024
- Table 70 Sales of Jeans by Category: Value 2019-2024
- Table 71 Sales of Jeans by Category: % Volume Growth 2019-2024
- Table 72 Sales of Jeans by Category: % Value Growth 2019-2024
- Table 73 Sales of Men's Jeans by Category: Volume 2019-2024
- Table 74 Sales of Men's Jeans by Category: Value 2019-2024
- Table 75 Sales of Men's Jeans by Category: % Volume Growth 2019-2024
- Table 76 Sales of Men's Jeans by Category: % Value Growth 2019-2024
- Table 77 Sales of Women's Jeans by Category: Volume 2019-2024
- Table 78 Sales of Women's Jeans by Category: Value 2019-2024
- Table 79 Sales of Women's Jeans by Category: % Volume Growth 2019-2024
- Table 80 Sales of Women's Jeans by Category: % Value Growth 2019-2024
- Table 81 NBO Company Shares of Jeans: % Value 2020-2024
- Table 82 LBN Brand Shares of Jeans: % Value 2021-2024
- Table 83 Forecast Sales of Jeans by Category: Volume 2024-2029
- Table 84 Forecast Sales of Jeans by Category: Value 2024-2029
- Table 85 Forecast Sales of Jeans by Category: % Volume Growth 2024-2029
- Table 86 Forecast Sales of Jeans by Category: % Value Growth 2024-2029
- Table 87 Forecast Sales of Men's Jeans by Category: Volume 2024-2029
- Table 88 Forecast Sales of Men's Jeans by Category: Value 2024-2029
- Table 89 Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029
- Table 90 Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029
- Table 91 Forecast Sales of Women's Jeans by Category: Volume 2024-2029
- Table 92 Forecast Sales of Women's Jeans by Category: Value 2024-2029
- Table 93 Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029
- Table 94 Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

## Hosiery in Morocco

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Prevailing economic uncertainty will constrain consumer spending

Hosiery players struggle to increase prices

Warm winter influences demand for hosiery

#### PROSPECTS AND OPPORTUNITIES

Ageing population will boost demand for functional hosiery

Competition from fashionable and functional sports socks

Focus on sustainability in the hosiery category

## **CATEGORY DATA**

- Table 95 Sales of Hosiery by Category: Volume 2019-2024
- Table 96 Sales of Hosiery by Category: Value 2019-2024
- Table 97 Sales of Hosiery by Category: % Volume Growth 2019-2024
- Table 98 Sales of Hosiery by Category: % Value Growth 2019-2024
- Table 99 NBO Company Shares of Hosiery: % Value 2020-2024
- Table 100 LBN Brand Shares of Hosiery: % Value 2021-2024
- Table 101 Forecast Sales of Hosiery by Category: Volume 2024-2029
- Table 102 Forecast Sales of Hosiery by Category: Value 2024-2029
- Table 103 Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029
- Table 104 Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

#### Footwear in Morocco

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Footwear outperforms apparel in Morocco

Healthy growth of footwear driven by shifting consumer preferences

Footwear brands focus distribution strategy on specialist stores

## PROSPECTS AND OPPORTUNITIES

Economic recovery to drive demand in children's footwear

Inflationary pressures to pose challenges to footwear

Consumers will appreciate brands focused on sustainability

#### **CATEGORY DATA**

Table 105 - Sales of Footwear by Category: Volume 2019-2024

Table 106 - Sales of Footwear by Category: Value 2019-2024

Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024

Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024

Table 109 - NBO Company Shares of Footwear: % Value 2020-2024

Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024

Table 111 - Distribution of Footwear by Format: % Value 2019-2024

Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029

Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029

Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029

Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

# Sportswear in Morocco

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Sportswear sees healthy growth fuelled by athleisure trend

Casualwear is more prominent in the workplace

Local brands support development of streetwear trend

#### PROSPECTS AND OPPORTUNITIES

Morocco's growing fitness culture to drive future sales

Mainstream apparel and footwear brands set to expand sports-inspired ranges

More sportswear brands to focus on sustainability

#### **CATEGORY DATA**

Table 116 - Sales of Sportswear by Category: Value 2019-2024

Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024

Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024

Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024

Table 120 - Distribution of Sportswear by Format: % Value 2019-2024

Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029

Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-morocco/report.