Coffee

August 2011

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COFFEE IN MOROCCO - CATEGORY ANALYSIS

HEADLINES

- 15% off-trade current value and 7% off-trade volume growth from 2009 to reach Dh864 million and 10,497 tonnes in 2010
- Higher global coffee prices put pressure on producers
- Instant standard coffee sees strongest off-trade current value growth of 24% in 2010
- 8% off-trade current value unit price growth seen in 2010
- Nestlé further extends lead by over a percentage point to 29% off-trade value in 2010
- 9% off-trade constant value CAGR expected for forecast period

TRENDS

- There was a marked rise in global coffee prices during the review period, with this putting growing pressure on players in this area. 2009 and 2010 saw two consecutive poor harvests for growers in Central America, notably impacting leading coffee producer Colombia. Overall, world coffee prices rose from around US$11.1 per kg in 2005 to US$14 per kg in 2010. However, behind these figures there were numerous sharp fluctuations in price, such as in the first half of 2008, while individual producing countries also saw their own fluctuations. Consequently, the impact of rising commodity prices on Moroccan coffee players depended on the timing and the location of their coffee supply contracts. Cafés Sahara was for example forced to increase prices substantially in 2010, while Café Dubois was able to keep prices relatively stable and even to use price promotions.
- Off-trade volume and current value growth both saw a stronger performance in 2010 in comparison to review period CAGR. This was largely due to the growing popularity of coffee among young adults, due to its fashionable image and greater ease of preparation in comparison to traditional Moroccan tea. Growth was also supported by a steady economic performance, even in the midst of the global economic downturn.
- There was also a growing trend of teenagers and young adults frequenting cafés after work, particularly in the country's largest cities Casablanca and Rabat. This was encouraged by a rise in the number of these outlets. Consequently, on-trade volume sales saw stronger growth in comparison to off-trade sales, rising by an impressive 11% in 2010 over the previous year and seeing a similar review period CAGR. Growing on-trade consumption also boosted off-trade consumption, meanwhile, with a growing number of consumers being used to drinking coffee on an everyday basis.
- Instant standard coffee saw the strongest growth in current value sales in 2010 over the previous year, growing by 24%. This product area benefited from a growing demand for convenience, with consumers increasingly starting the day with a cup. Instant standard coffee is most popular among mid- and high-income teenagers and young adults in urban areas. Older consumers and rural consumers meanwhile tend to be more traditional in their preferences, opting for traditional Moroccan gunpowder tea or fresh ground coffee.

- Coffee saw a marked rise in unit price in 2010 at 6% in constant value terms. This was partly as a result of rising global coffee prices and partly due to the ongoing shift to instant coffee. Consumers increasingly sought convenience, with lower-priced products such as fresh coffee beans and fresh ground coffee thus losing share to instant variants. Instant standard coffee also saw the strongest growth in unit price in 2010. With its mid- and high-income consumer base being les price-sensitive players felt more able to increase prices.
- There is no significant presence for vending in coffee. Most vending machines present in the country are based in captive locations such as workplaces, hospitals and education facilities. They are therefore excluded from the scope of this report.
- The first specialist coffee shops began to open in Morocco towards the end of the review period. However, there were only a handful of these outlets in Casablanca and Rabat by 2010, with their high prices ensuring that they catered solely to high-income consumers. Consequently, this channel had considerably less impact on coffee sales than cafés, accounting for just around a tonne of on-trade volume sales in 2010. In comparison, overall on-trade sales reached over 2,000 tonnes in the year.

COMPETITIVE LANDSCAPE

- Nestlé was the leader in value terms in coffee in 2010, accounting for 29% value share. This is due to the company's strong presence in instant coffee, where it dominated in 2010 with 69% value share. The company offers competitive pricing in instant coffee and also benefits from the strong global brand name of its Nescafé range. The company lost over half a percentage point value share in instant coffee in the year. However, this was due to the company increasing prices to a lesser degree than its competitors, with the company seeing a slight rise in volume share in instant coffee in 2010 over the previous year. The strong performance of instant coffee meanwhile resulted in the company gaining over a percentage point in value share in overall coffee in 2010 over the previous year.

PROSPECTS

- The emergence of specialist coffee shops in Morocco during the forecast period could well boost the concept of coffee culture among mid- and high-income urban consumers and is expected to result in a growing gourmet coffee trend. Second Cup Coffee Co, in partnership with Groupe Amarg, announced plans to open four Second Cup specialist coffee shops in Casablanca's Morocco Mall in October 2011, with the mall expected to attract 14 million visitors annually. This chain has a premium positioning and, while originating in Canada in the 1980s, a strong position in the Middle East. If these four initial outlets prove successful, the chain is planning to expand rapidly.

CATEGORY DATA

Table 1 Coffee Machine Sales: 2005-2010

'000 units

	2005	2006	2007	2008	2009	2010
Coffee Machines						

Source: Official Statistics, trade associations, trade press, company research, store checks, trade interviews, Euromonitor International estimates

Table 2 Retail Sales of Coffee by Category: Volume 2005-2010

Tonnes

	2005	2006	2007	2008	2009	2010
Fresh Coffee						
- Fresh Coffee Beans						
- Fresh Ground Coffee						
Instant Coffee						
- Instant Standard Coffee						
- Instant Decaffeinated Coffee						
Coffee						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Retail Sales of Coffee by Category: Value 2005-2010

Dh million

	2005	2006	2007	2008	2009	2010
Fresh Coffee						
- Fresh Coffee Beans						
- Fresh Ground Coffee						
Instant Coffee						
- Instant Standard Coffee						
- Instant Decaffeinated Coffee						
Coffee						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Retail Sales of Coffee by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Fresh Coffee			
- Fresh Coffee Beans			
- Fresh Ground Coffee			
Instant Coffee			
- Instant Standard Coffee			
- Instant Decaffeinated Coffee			
Coffee			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Retail Sales of Coffee by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Fresh Coffee			
- Fresh Coffee Beans			
- Fresh Ground Coffee			
Instant Coffee			
- Instant Standard Coffee			
- Instant Decaffeinated Coffee			
Coffee			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Fresh Ground Coffee: Standard Vs Pods 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Pods						
Standard						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Coffee Company Shares by Retail Value 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Coffee Brand Shares by Retail Value 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Retail Sales of Coffee by Category: Volume 2010-2015

Tonnes

	2010	2011	2012	2013	2014	2015
Fresh Coffee						
- Fresh Coffee Beans						
- Fresh Ground Coffee						
Instant Coffee						
- Instant Standard Coffee						
- Instant Decaffeinated Coffee						
Coffee						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Retail Sales of Coffee by Category: Value 2010-2015

Dh million

	2010	2011	2012	2013	2014	2015
Fresh Coffee						
- Fresh Coffee Beans						
- Fresh Ground Coffee						
Instant Coffee						
- Instant Standard Coffee						

- Instant Decaffeinated Coffee	
Coffee	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Retail Sales of Coffee by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Fresh Coffee			
- Fresh Coffee Beans			
- Fresh Ground Coffee			
Instant Coffee			
- Instant Standard Coffee			
- Instant Decaffeinated Coffee			
Coffee			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Retail Sales of Coffee by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Fresh Coffee		
- Fresh Coffee Beans		
- Fresh Ground Coffee		
Instant Coffee		
- Instant Standard Coffee		
- Instant Decaffeinated Coffee		
Coffee		

Source: Euromonitor International from trade associa ions, trade press, company research, trade interviews, trade sources

Table 13 Fresh Ground Coffee: Forecast Standard Vs Pods 2010-2015

% retail value rsp

	2010	2011	2012	2013	2014	2015
Pods						
Standard						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

COFFEE IN MOROCCO - COMPANY PROFILES

CAFE DUBOIS SA IN HOT DRINKS (MOROCCO)

strategic Direction

~ Cafe Dubois is expected to continue to focus on expanding distribution during the forecast period. The company is keen to increase its export presence, although it may have to reassess its expansion strategy given high levels of unrest in some of its main export customers in 2011 such as Libya and Egypt. The company is also keen to expand its distribution in Morocco, both via on- and off-trade channels. Consequently, as tourism returns to stronger growth from the middle of the forecast period Cafe Dubois is expected to benefit.

Key Facts

Summary 1 Cafe Dubois SA: Key Facts

Full name of company:	Cafe Dubois SA
Address:	75 Rue Amir Abdelkader, Casablanca, Morocco
Tel:	+212 (22) 620 334
Fax:	+212 (22) 618 672
www:	www.cafesdubois.ma
Activities:	Coffee

Source: Euromonitor International from company reports, company research, trade press, trade sources

Company Background

~ Cafe Dubois is a privately-owned company and was established in Morocco in 1926.

~ The company is solely focused on coffee.

~ The company has nationwide distribution coverage, although its presence is stronger in the country's cities. In addition to a strong retail presence, the company is one of the leading coffee providers to the on-trade in Morocco and also has a presence in vending.

~ The company focused on expanding its distribution towards the end of the review period, both within Morocco and in export terms. Within Morocco, the company sought to gain a presence in a growing number of retail outlets.

~ The company also focused on price competition towards the end of the review period. The company's range has a high-end positioning and is higher priced than many competing domestic brands. Consequently, the company offered price promotions in order to attract increasingly price-sensitive consumers.

Production

~ Cafe Dubois imports coffee into Morocco but processes and packages its coffee within the country. The company's raw coffee imports are from a wide range of countries, including Colombia, Brazil, Indonesia, Kenya, the Ivory Coast and Costa Rica.

~ The company is mainly focused on domestic sales, with these accounting for over 90% of its production volume at the end of the review period. However, the company also exports a small volume to countries in the Middle East, with the share of exports increasing in recent years. The company notably focused on expanding export sales in Egypt, Libya, the United Arab Emirates and Mauritania towards the end of the review period.

~ The company does not produce private label products or products for third party players.

Competitive Positioning

~ Cafe Dubois ranked sixth in overall hot drinks in 2010 with an off-trade value share of 5%. The company mainly derived this share from fresh coffee, where it ranked third in both fresh coffee beans and fresh ground coffee and accounted for an overall share of 21%. The company also ranked fourth in instant coffee with a value share of 4%. Within this product area, the company accounted for 4% and 5% value share respectively in instant standard coffee and instant decaffeinated coffee respectively and ranked fourth and second.

~ The lost share slightly in overall hot drinks in 2010 over the previous year, with this chiefly due to a poor company performance in fresh ground coffee. Within fresh ground coffee, the company saw almost a percentage point decline in value share to account for 19% share. This was chiefly due to the company lowering prices and using price promotions in order to attract consumers, in response to rising economic uncertainty. While the company lost share in value terms, it therefore retained a steady off-trade volume share in 2010 over the previous year.

~ The company offers a wide range within coffee. The company offers eight brands, including fresh coffee beans, fresh ground coffee, instant standard coffee and instant decaffeinated coffee.

~ The company's fresh coffee is positioned as high-end, with the company emphasising the quality of its production process and coffee beans. However, the company's instant standard coffee is cheaper than that offered by multinationals such as Nestle.

Summary 2 Cafe Dubois SA: Competitive Position 2010

Product type	Value share	Rank
Coffee	13.8%	4

Source: Euromonitor International from company reports, company research, trade press, trade sources, trade interviews

HOT DRINKS IN MOROCCO - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Good Growth Driven by Rising Income Levels

Hot drinks saw good growth in volume and value sales during the review period. Growth was underpinned by rising disposable income levels associated with the country's economic growth. Within tea, many traded up from unpackaged tea as a result, in search of hygiene and better quality. There was also growing interest in coffee, particularly among teenagers and young adults. "Other" hot drinks also benefited from rising income levels, with a widening range of parents treating their children to these products as a result.

Burgeoning Café Culture Boosts On-trade Sales

The on-trade saw considerably stronger growth in comparison to the off-trade in 2010 over the previous year and during the review period as a whole. This was chiefly due to the growing number of cafés opening across Morocco and particularly in the country's main cities Rabat and Casablanca. There was a growing trend for teenagers and young adults to meet up with friends after work or college to socialise over coffee.

Domestic Gunpowder Tea Players Lead

The leading players in hot drinks in 2010 were Mido Food, Cafés Sahara and Holmarcom, with these players together dominating sales. These players derive their strength from their brands' longstanding presence in gunpowder tea. Mido and Holmarcom solely offer gunpowder tea within "other" tea, while Cafés Sahara is strong in both coffee and gunpowder tea. Gunpowder tea has a strong traditional popularity in Morocco and benefited during the review period from an ongoing shift from unpackaged to packaged variants.

Continued Steady Shift To Supermarkets/hypermarkets

Independent small grocers continued to dominate sales of hot drinks at the end of the review period. However, there was an ongoing slow but steady shift towards supermarkets/hypermarkets. This was due to the ongoing expansion of supermarkets/hypermarkets across Morocco. Supermarkets/hypermarkets proved increasingly attractive to consumers due to their wider range of hot drinks and offer of price promotions.

Sales Set To Continue To Grow Thanks To Affluence and Demand for Convenience

Hot drinks is expected to continue to see good growth during the forecast period, with this largely fuelled by rising disposable income levels. Constant value growth will mainly be driven by coffee, with ongoing growth in this area driven by the convenience of instant coffee and the gourmet image of fresh coffee. Tea is meanwhile expected to see ongoing commoditisation but will continue to see good volume sales growth as consumers switch from unpackaged tea. Similarly, "other" hot drinks will see constant value decline due to price competition but is expected to see steady volume growth during the forecast period as a wider range of income groups buy these products.

KEY TRENDS AND DEVELOPMENTS

Growing Urbanisation Boosts Sales

Current Impact

Outlook

Future Impact

Young Consumer Base Proves Receptive To New Trends

Current Impact

Outlook

Future Impact

Rise of Supermarkets/hypermarkets Hindered by Economic Uncertainty

Current Impact

Outlook

Future Impact

MARKET DATA

Table 14 Retail Vs Foodservice Sales of Hot Drinks: % Volume Breakdown 2005-2010

% volume analysis

	2005	2006	2007	2008	2009	2010
Off-trade						
On-trade						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Retail Vs Foodservice Sales of Hot Drinks: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Retail			
Foodservice			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Retail Sales of Hot Drinks by Category: Volume 2005-2010

Tonnes

	2005	2006	2007	2008	2009	2010
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Retail Sales of Hot Drinks by Category: Value 2005-2010

Dh million

	2005	2006	2007	2008	2009	2010

Coffee	
Tea	
Other Hot Drinks	
Hot Drinks	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Retail Sales of Hot Drinks by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Retail Sales of Hot Drinks by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Foodservice Sales of Hot Drinks by Category: Volume 2005-2010

Tonnes

	2005	2006	2007	2008	2009	2010
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Foodservice Sales of Hot Drinks by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Total Sales of Hot Drinks by Category: Total Volume 2005-2010

Tonnes

	2005	2006	2007	2008	2009	2010
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Total Sales of Hot Drinks by Category: % Total Volume Growth 2005-2010

% total volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Hot Drinks Company Shares by Retail Value 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Hot Drinks Brand Shares by Retail Value 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Penetration of Private Label by Category 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Coffee						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Hot Drinks by Distr bution Format: % Analysis 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Store-Based Retailing						
- Grocery Retailers						
- - Supermarkets/ Hypermarkets						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Independent Small Grocers						
- - - Forecourt Retailers						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- Internet Retailing						
- Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Sales of Hot Drinks by Category and Distribution Format: % Analysis 2010

% retail volume

	C	T	OHD
Store-Based Retailing			
Grocery Retailers			
Supermarkets/Hypermarkets			
Discounters			
Small Grocery Retailers			
Convenience Stores			
Independent Small Grocers			
Forecourt Retailers			
Other Grocery Retailers			
Non-Grocery Retailers			
Non-Store Retailing			
Vending			
Homeshopping			
Internet Retailing			
Direct Selling			

Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: C = coffee; T= tea; OHD = other hot drinks

Table 29 Forecast Retail Vs Foodservice Sales of Hot Drinks: % Volume Breakdown 2010-2015

% volume analysis

	2010	2011	2012	2013	2014	2015
Off-trade						
On-trade						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Retail Vs Foodservice Sales of Hot Drinks: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Retail			
Foodservice			
Total			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Retail Sales of Hot Drinks by Category: Volume 2010-2015

Tonnes

	2010	2011	2012	2013	2014	2015
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Retail Sales of Hot Drinks by Category: Value 2010-2015

Dh million

	2010	2011	2012	2013	2014	2015
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33	Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 34	Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Coffee		
Tea		
Other Hot Drinks		
Hot Drinks		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 35	Forecast Foodservice Sales of Hot Drinks by Category: Volume 2010-2015

Tonnes

	2010	2011	2012	2013	2014	2015
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 36	Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 37	Forecast Total Sales of Hot Drinks by Category: Total Volume 2010-2015

Tonnes	2010	2011	2012	2013	2014	2015
Coffee						
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 38 Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2010-2015

% total volume growth	2014/15	2010-15 CAGR	2010/15 TOTAL
Coffee			
Tea			
Other Hot Drinks			
Hot Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPENDIX

Production/import/export Data

- There is no official data available regarding the production and export of coffee, tea and "other" hot drinks. However, import data is available for tea and coffee, with the most recent year being 2009 for this data. The tea and coffee available in Morocco is mostly imported, with tea being dominated by Chinese gunpowder tea and coffee being imported from a wide range of producers.

Table 39 Imports of Hot Drinks by Sector 2008-2009

'000 tonnes	2008	2009
Tea		
Coffee		

Source: Office de Change

DEFINITIONS

This report analyses the market for Hot Drinks in Morocco. For the purposes of the study, the market has been defined as follows:

~ Coffee

~ Tea

~ Other Hot Drinks

Sources used during research include the following:

Summary 3 Research Sources

Official Sources	Bank Almaghrib
	Chambre de Commerce et d'industrie de Casablanca
	Direction Generale des Impots
	Haut Commissariat au plan
	Le Maroc en Chiffres
	L'Office de Change
	Ministere des Finances et de la Privatisation
	Ministere du Commerce Exterieur
	Office National du The
Trade Associations	Association Marocaine des Consommateurs
	UNESDA & C1SDA
Trade Press	AJC
	AI Alam
	AI Ayyam
	AI Bidaoui
	AI Kanz
	AI Mountakhab
	Albayane
	Attajdid
	Au fait Maroc
	Aujourd'hui le Maroc
	B2B Maroc
	Bayane AI Yaoum
	Beverage Net
	Beverage World
	Bourse Casa Blog
	Casamavllle
	Economie & Entreprise
	Fellah trade
	Fld hebdo
	Flex News food
	Food Bev
	Hebdomadaire

Info Bladi
Infos Bladi
Jeune Afrique
La Gazette du Maroc
La Nouvelle Tribune
La vie eco
La Vie Economique
Le Journal Hebdomadaire
Le Matin
Le Reporter
L'Economiste
L'Opinion
Maghribia
Managers
Maroc Annonces
Maroc Hebdo
Media Marketing (Morocco)
Morocco Business News
Parade
Rissalat Al Oumma

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