





MOROCCO

Tobacco industry profile



World Health Organization

Regional Office for the Eastern Mediterranean

COUNTRY PROFILE		INDUSTRY	
 <p>Trends</p>	<ul style="list-style-type: none"> The volume and value of tobacco products increased throughout 2015 despite price increases (1). Waterpipe tobacco (shisha) had the strongest growth in volume for 2013 (1). 31.5% of males and 3.3% of females aged 15–74 years are current tobacco smokers (2). 	<p>Domestic</p> <p>Société Marocaines des Tabacs</p> <ul style="list-style-type: none"> Owned 83% of retail volume in cigarettes, 99% for smoking tobacco in 2015 (9). Distribution mainly focuses on kiosks, grocery retailers and van and truck sales (1). Owned by Imperial Tobacco Group (9). 	
 <p>Products</p>	<p>Products</p> <ul style="list-style-type: none"> Cigarettes (27.4% of men, 0.2% of women) (2) Cigars Waterpipe, shisha <p>Smokeless products remain unavailable in retail channels (3).</p>	<p>International</p> <p>North Africa Tobacco Co.</p> <ul style="list-style-type: none"> Founded in 2010 and responsible for the distribution of Japan Tobacco International's products (10). Ranked number 2 for cigarette sales for 2015, with a volume share of 5.3% of the cigarette market (10). <p>British American Tobacco Middle East and North Africa (11)</p> <ul style="list-style-type: none"> Founded in 2010, the company focuses on the importation and distribution of cigarettes throughout the country (12). A subsidiary company of British American Tobacco (12). Ranked number 3 among cigarette companies in the country (12). <p>Phillip Morris International</p> <ul style="list-style-type: none"> In 2009, Phillip Morris International signed a license agreement with Altadis Maroc to manufacture Marlboro (13). Philip Morris Maroc S.A.R.L., a new Phillip Morris International affiliate, was established in July 2009 (14). 	
 <p>Finance</p>	<ul style="list-style-type: none"> In 2015, sales of cigarettes increased by 3% in retail volume from the previous year (4). In 2014, total tax revenues on tobacco products amounted to approximately 10 billion Moroccan dirhams (5). Total expenditure on health per capita was US\$ 447, in 2014 (6). 5.9% of gross domestic product was allocated to expenditure on health in 2014 (6). 		
 <p>Mortality</p>	<ul style="list-style-type: none"> Heart disease is the most common cause of smoking-related deaths (6). In 2004, 8% of deaths were attributable to tobacco (7). Noncommunicable diseases are estimated to account for 75% of deaths, with tobacco smoking as a leading factor (8). 		

BY THE NUMBERS		Market share, cigarettes [retail volume (%)] (13)																						
9.5%	Percentage of youth aged 13–15 years who use any tobacco product according to the latest survey conducted in 2010 (2).	Global brand owner	2010	2012	2014																			
One in five	Students living in homes where others smoke (15).	Imperial Tobacco Group Plc	81.70	73.80	75.30																			
4500	Hectares out of 9000 total farm land for the tobacco farming industry as of 2003, which is considered to be small (16).	Philip Morris International Inc.	6.50	7.60	6.60																			
		Japan Tobacco Inc.	1.60	2.80	3.90																			
		British American Tobacco Plc	1.50	1.10	1.40																			
		Others	8.80	14.80	12.90																			
		“Cigarettes in Morocco are still virtually a monopoly. The category is essentially controlled by Société Marocaines des Tabacs (SMT), which is owned by Imperial Tobacco Group (4).”																						
TRADE		INDUSTRY INTERFERENCE																						
<p>Import and export 2015</p> <p>Trade value in million (US\$) (17)</p> <p>Export</p> <table> <tr> <td>Cigarettes</td> <td>2.0</td> </tr> <tr> <td>Unmanufactured tobacco</td> <td>-</td> </tr> </table> <p>Import</p> <table> <tr> <td>Cigarettes</td> <td>81.33</td> </tr> <tr> <td>Unmanufactured tobacco</td> <td>44.20</td> </tr> </table> <p>Main trade partners, 2015 (17)</p> <table> <thead> <tr> <th>Export</th> <th>Import</th> </tr> </thead> <tbody> <tr> <td>• Spain</td> <td>• Switzerland</td> </tr> <tr> <td>• France</td> <td>• Turkey</td> </tr> <tr> <td></td> <td>• France</td> </tr> <tr> <td></td> <td>• Brazil</td> </tr> <tr> <td></td> <td>• Portugal</td> </tr> </tbody> </table>		Cigarettes	2.0	Unmanufactured tobacco	-	Cigarettes	81.33	Unmanufactured tobacco	44.20	Export	Import	• Spain	• Switzerland	• France	• Turkey		• France		• Brazil		• Portugal	<ul style="list-style-type: none"> The tobacco industry is intertwined with the Government of Morocco, Régie des Tabacs, the national tobacco distribution company, has exclusive rights on the distribution of tobacco products (1). <p>“...In Morocco ... [we] initiated a tax study which we expect will lead to structural changes in the future” (18).</p> <p style="text-align: right;"><i>Philip Morris, 1986</i></p>		
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MARKETING		CORPORATE SOCIAL RESPONSIBILITY																						
<p>Point-of-sale advertising is not prohibited under law (2). As a result, retailers carry posters and photographs of the most well-known cigarette brands. Tobacco manufactures offer retailers commissions to promote certain brands.</p> <p>Despite efforts to ban direct tobacco advertising (2), seven in 10 people had seen pro-cigarette advertisements on billboards and two thirds of students aged 13–15 had seen pro-cigarette advertisements in newspapers or magazines in 2010 (15).</p>		<p>Corporate social responsibility is an inherent contradiction, as the industry’s core functions are in conflict with the goals of public health policies with respect to tobacco control.</p> <p>Corporate social responsibility activities have been reported. However, countries are encouraged to abide by Article 5.3 of the WHO Framework Convention on Tobacco Control, protecting public health policies with respect to Tobacco control from commercial and other vested interests of the tobacco industry, through banning corporate social responsibility activities by the tobacco industry, often used to circumvent laws regulating the industry.</p>																						

NEXT STEPS FORWARD

Morocco is not yet a party to the WHO Framework Convention on Tobacco Control (WHO FCTC), however this will not prevent the country from taking the steps needed to control the tobacco industry. A few steps are suggested:

- fully operationalize the Guidelines of Article 5 of the WHO FCTC at national level;
- introduce a multisectoral approach to the implementation of Article 5.3, within the implementation of the WHO FCTC;
- put in place a mechanism to monitor the tobacco industry activities and report publicly on that if and when possible.

References

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 16. [Analysis of the economics of tobacco in Morocco](#)
 17. [UN Comtrade Database](#)
 18. [Philip Morris International corporate affairs memorandum](#)
- See also [Voice of truth \(vol. I\)](#) and [Voice of truth, 2nd ed](#)