

Required Report: Required - Public Distribution

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Report Name: Food Processing Ingredients

Country: Morocco

Post: Rabat

Report Category: Food Processing Ingredients

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Report Highlights:

Morocco's food processing sector plays an essential role in the Moroccan economy, accounting for 6 percent of Moroccan GDP and benefits from excellent infrastructure, world-class manufacturing facilities, and convenient access to neighboring African markets. The U.S.- Morocco Free Trade Agreement provides advantages for U.S. products as tariff rates for many U.S. food products exported to Morocco are phased out.

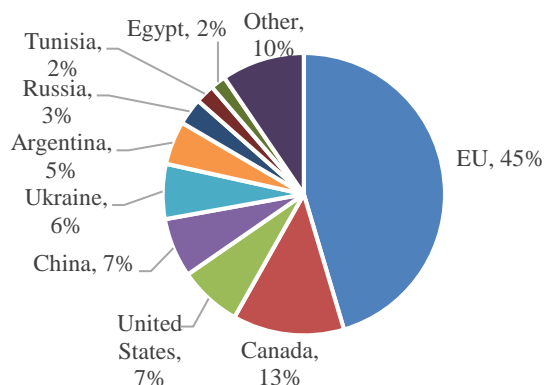
Market Fact Sheet: Morocco

Executive Summary

Morocco's food processing industry is comprised of 2,050 registered companies and employs more than 159,500 people; approximately 85 percent of them are small size companies with less than 20 employees. Food processing sales are a major focus in the domestic market and generated about \$6 billion in 2020. The U.S.- Morocco Free Trade Agreement provides advantages for U.S. products as tariff rates for many U.S. food products exported to Morocco are phased out.

Competition for Imported Food Processing Ingredients in 2020

In 2020, Morocco imported about \$3.3 billion worth of food processing ingredients products. The European Union is Morocco's primary trading partner, and the source of 45 percent of Morocco's food processing ingredients imports.



Sources: Office des Changes

Food Service Industry

In 2020, Morocco's food service industry has been greatly affected by social distancing measures in the fight against coronavirus. Industry sources report that sector revenue fell by 50 percent compared to the previous year. Morocco's food service industry is most developed in Casablanca (commercial center) and Marrakech (tourism).

Food Retail Industry

In 2019, U.S. exports of retail-related products to Morocco totaled \$57 million. The United States faces stiff competition from the European Union. The Casablanca-Rabat corridor accounts for about 50% of all modern retailers. Marjane Holding (Marjane and Acima) and Label'Vie (Carrefour, Carrefour Market, and Atacadao) are Morocco's leading modern food retailers with other notables including Ynna (Aswak Salam) and BIM.

Quick Facts CY 2020

Imports of Consumer-Oriented Food Products:

\$2 billion from the World
\$ 127 million from the United States

Top 10 Best Products:

- Tree Nuts
- Oilseeds
- Dairy Products
- Food Preparations
- Fats & Oils
- Sweeteners & Confectionary
- Chocolate
- Poultry and Beef
- Specialty wheats
- Vegetables

Food Trade (U.S. billion) 2020:

Food Exports- Agricultural and Related Products total (2020)	\$6.4
Food Imports- Agricultural and Related Products total (2020)	\$7.2
Food Service Sales	\$3.3

Top 6 QSR Chains in Morocco:

- McDonalds
- Pizza Hut
- Domino's Pizza
- KFC
- Burger King
- Pomme de Pain

Top Morocco's Retailers:

- [Marjane Holding](#) (Marjane and Acima)
- [Label'Vie](#) (Carrefour, Carrefour Market, and Atacadao)
- [Ynna Holding](#) (Aswak Salam)
- [BIM](#) Stores SARL (BIM)
- [Akwa Group](#) (Minibrahim)

GDP/Population 2020:

Population (*millions*): 36
GDP (*billions USD*): \$113
GDP per capita (*USD*): \$3,139

Sources: [World Bank](#), [Morocco Office des Changes](#), [Morocco Haut Commissariat au Plan](#), [Central Intelligence Agency \(CIA\)](#), [IMF World Economic Outlook](#), FAS Rabat office research.

Moroccan Market Advantages and Disadvantages

Strengths	Weaknesses
Morocco is one of the fastest growing economies in North Africa.	Distance and lack of shipping lines. Freight disadvantage.
Opportunities	Challenges
US-Morocco FTA provides access in Morocco and opportunities to use Morocco as a platform to reach Africa at large.	Erosion of U.S. preferences vis-à-vis Morocco's FTAs with the EU, Arab League,

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COVID-19: The COVID-19 outbreak significantly affected Morocco’s Food Processing Industry. On March 20, 2020, the Government of Morocco (GOM) declared a state of emergency, requiring food manufacturers to reduce their workforce, diminishing productivity. The most significantly affected food processors were those that depend on the hotel, restaurant and institutional (HRI) sector.

SECTION I. MARKET SUMMARY

Morocco’s food processing industry is comprised of 2,050 registered companies and employs more than 159,500 people; approximately 85 percent of them are small size companies with less than 20 employees. Food processing sales are a major focus in the domestic market and generated about \$6 billion in 2020.

Advantages and Challenges Specific to the Food Processing Ingredients Industry in Morocco

Advantages	Challenges
Morocco’s relative stability, openness to trade, development, and institutions make it an attractive destination to do business as well as an attractive hub to reach out across Africa.	Distance vis-à-vis Europe, the Black Sea, and the Middle East hurt U.S. competitiveness.
	Food safety regulations largely influenced by the European Union, while being irregularly enforced.

SECTION II. ROAD MAP FOR MARKET ENTRY

For general information, see [Morocco Exporter Guide](#).

Opportunities for U.S. food processing ingredients exist primarily in/near Casablanca, Morocco’s commercial hub center, where most importers and food processors are located.

Larger Moroccan food processing businesses may import directly, while smaller processors procure ingredients through importers and local wholesalers. Top food processing sectors in Morocco include dairy, bakery, sugar, chocolate and confectionery, vegetable oil, horticultural processing, red and poultry meat, soft drinks.

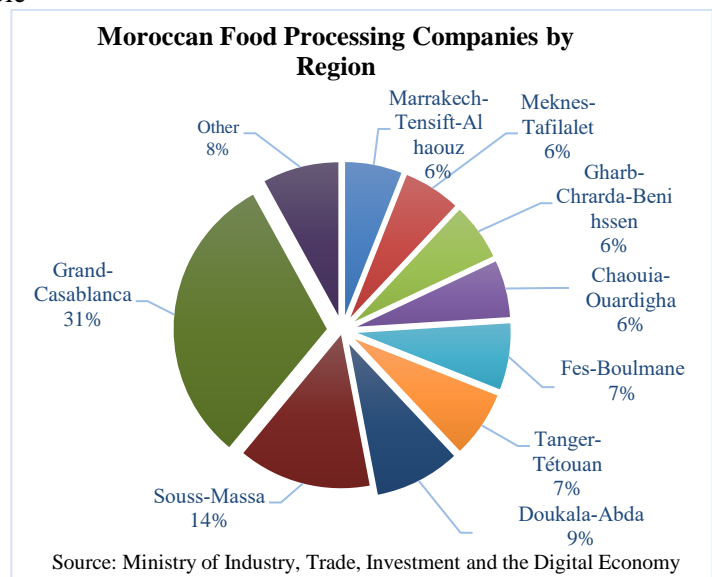
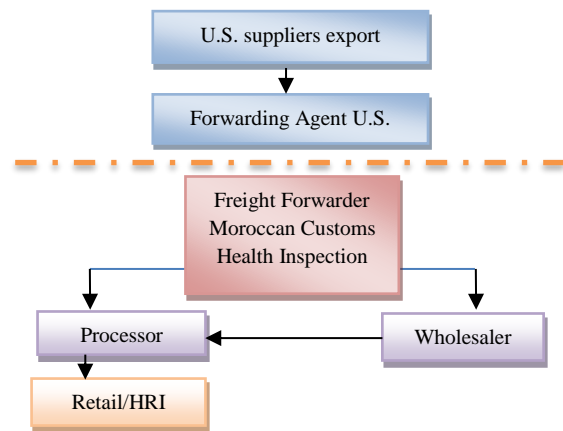
Trade Shows:

Trade shows in Morocco offer excellent opportunities for U.S. exporters to make contact with potential clients or business partners from Morocco.

The most important trade shows related to the food processing sector are:

- [Siab Expo Maroc](#) (Nov. 24-27, 2021)
- [Cremai Maroc](#),
- [MaroCarne & Milk](#)

NB: Due to COVID-19 pandemic, information about trade fairs and events may be out of date. You can get more information from the organizer.



SECTION III. COMPETITION

Category	HS	Description	Average Imports (2016-20)			US Duty	Top Foreign Suppliers
			World	USA	%		
Meat & Poultry	0201-0202	Beef, Chilled/Frozen*	\$28,550,642	\$8,426	0.03%	*	EU, Aust
	207	Poultry, Chilled/Frozen*	\$1,264,553	\$85,499	6.76%	*	EU, Braz
Dairy	40210	Non-fat Dry Milk	\$12,960,277	\$1,697,626	13.10%	0%	EU, Ireland
	404	Whey	\$48,711,235	\$6,099,802	12.52%	0%	EU, Argen, Turk
	40510	Butter	\$81,788,593	\$1,425,635	1.74%	0%	EU, Rus, Chin
	406	Cheese	\$95,300,306	\$1,928,730	2.02%	0%	EU, Tuni, Egypt
Eggs	408	Processed Eggs	\$1,145,781	\$5,789	0.51%	0%	EU, Ukra, India
Vegetables	70190	Potatoes, Fresh (not seed)	\$318,894	\$115,428	36.20%	0%	EU, Rus, Egypt
	710	Vegetables, Frozen	\$696,616	\$23,751	3.41%	0%	EU, Peru, Egypt
	712	Vegetables, Dried	\$1,723,274	\$112,555	6.53%	0%	EU, Egypt, India
	713	Legume Veg, Dried Shelled	\$69,680,535	\$2,819,047	4.05%	0%	Canad, Egypt, EU
Fruits & Nuts	080211-080212	Almonds*	\$27,782,017	\$26,035,742	93.71%	0%	Chile, EU, Chin
	080231-080232	Walnuts	\$24,281,034	\$9,248,557	38.09%	0%	Chile
	080250-080251	Pistachios	\$3,238,693	\$1,892,307	58.43%	0%	Iran
	80290	Other Tree Nuts (Pecans)	\$69,458	\$39,388	56.71%	0%	Tuni, EU, Aust
	80410	Dates	\$140,199,176	\$1,725	0.00%	0%	Tuni, Egypt, UAE
	80620	Raisins	\$7,523,993	\$0	0.00%	0%	India, Turk, Iran
Coffee, Tea, Spices	902	Tea	\$213,001,702	\$66,187	0.03%	0%	Chin, India, Indo
	0904-0910	Spices	\$39,921,963	\$78,355	0.20%	0%	Chin, India, Braz
Cereals	1001	Wheat*	\$1,091,095,215	\$54,094,820	4.96%	*	EU, Rus, Ukr
	1006	Rice	\$18,277,620	\$1,804,317	9.87%	0%	India, EU, Thai
Milled Products	110630	Flours of Fruit/Tree Nuts	\$1,178,229	\$75,697	6.42%	0%	EU, Phili
	110812	Corn Starch	\$2,371,903	\$473	0.02%	0%	EU, Turk, Egypt
Oilseeds	1201	Soybeans	\$24,130,667	\$18,169,788	75.30%	0%	Urug, Ukra
	120600	Sunflower Seeds	\$7,326,984	\$664,326	9.07%	0%	Argen, EU
Other Plant Products	1302	Vegetable Saps, Extracts; Pectates; Agar-Agar	\$22,067,351	\$155,607	0.71%	0%	EU, India, Chin
Fats & Oils	1502	Fats Of Bovines, Sheep/Goats Other Than Head 1503	\$8,131,519	\$7,911,764	97.30%	0%	EU
	150710	Soybean Oil, Crude	\$386,095,738	\$25,132,072	6.51%	0%	EU, Argen, Rus
	150910	Olive Oil, Virgin	\$14,257,179	\$86,925	0.61%	0%	Tuni, EU
	151521	Corn Oil, Crude	\$3,334,773	\$191,459	5.74%	0%	Braz, EU
	151529	Corn Oil, Refined	\$8,941,520	\$150	0.00%	0%	EU
Prep Meat Products	1602	Prep/Pres Meat & Poultry Prods	\$12,332,997	\$125	0.00%	0%	EU, Braz, Rus
	1604	Prep/Pres Fishery Products	\$14,184,863	\$83,256	0.59%	0%	Seneg, EU, UAE
Sweeteners, Confectionary	170211-170219	Lactose	\$1,322,942	\$210,502	15.91%	0%	EU, Canad
	170230-170240	Glucose	\$4,020,797	\$34,141	0.85%	0%	Turk, EU, Egypt
	170490	Sugar Confection	\$10,235,186	\$58,723	0.57%	10.80%	EU, Turk, Egypt
Chocolate	1806	Chocolate & Cocoa Products	\$56,109,105	\$198,697	0.35%	10.80%	UAE, EU, Turk
Prep/Pres Cereals	190120	Mixes & Doughs	\$2,563,582	\$10,506	0.41%	10.80%	EU, Turk, UAE
	1904	Food Preps of Cereals	\$15,590,860	\$17,622	0.11%	0%	EU, Chin, Egypt
Prep/Pres Fruit, Veg	200190	Prep/Pres Veg/Fr/Nut by Vinegar	\$639,822	\$14,096	2.20%	0%	Chin, EU, Ecu
	200290	Tomato Paste	\$11,026,009	\$0	0.00%	0%	Egypt, EU, Chin
	2005	Prep/Pres Vegetables, Not Frozen	\$15,400,625	\$166,184	1.08%	0%	Chin, EU, Turk
	2008	Prep/Pres Fruits & Nuts	\$12,116,040	\$548,041	4.52%	0%	EU, Egypt, Thai
Food Products	200911-200919	Orange Juice	\$5,570,037	\$55,771	1.00%	0%	Egypt, Braz, EU
	2102	Yeasts; Baking Powder	\$8,727,667	\$6,081	0.07%	0%	EU
	2103	Sauces & Condiments	\$26,799,639	\$754,572	2.82%	0%	EU, Chin, Egypt
	210610	Protein Concentrates	\$5,218,651	\$3,827,373	73.34%	0%	EU, Egypt, Turk
Vinegar	210690	Food Preparations	\$74,150,395	\$2,721,135	3.67%	0%	EU, Egypt, Turk
	220900	Vinegar	\$1,708,893	\$4,479	0.26%	0%	EU, Chin
Odoriferous Mixtures	3302	Odoriferous Mixtures	\$73,676,903	\$457,161	0.62%	0%	EU, Egypt, Aust
Proteins	3501	Casein & Caseinates	\$13,152,715	\$20,172	0.15%	0%	EU, India

*Subject to Tariff Rate Quota (see the [U.S.-Morocco Tariff Schedule for 2021](#))

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Products present in the market that have good sales potential:

- Almonds, Walnuts, Pistachios
- Fats and Oils, including Soy, Corn, Tallow, and Butter

Products not present in significant quantities but which have good sales potential:

- Dairy Products, including whey powders
- Prunes, Raisins, Cranberries, Blueberries
- Specialty wheat products for the baking industry (ex. high or low protein)
- Processed eggs
- Pecans, Hazelnuts
- Pulses
- Confectionary
- Rice
- Popcorn

Products not present because they face significant barriers:

- Seed Potatoes for processing, health certificate under negotiation
- Goat and sheep, no market access
- Meat of swine (Pork), no market access

SECTION V. POST CONTACT AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need further assistance exporting to Morocco, please contact the Foreign Agricultural Service in Rabat. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

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National Federation of the Food Processing Industry (FENAGRI)

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E-mail: Contact@fenagri.org

Web: <https://www.fenagri.org/>

TOP FOOD PROCESSING COMPANIES, BY SECTOR:

Company Name	End-User Channels	Procurement Channels
Cereals		
A&m Intercommodity	Retail/HRI	Importers/Direct
Casa Grains	Retail/HRI	Importers/Direct
Copragri S.A.	Retail/HRI	Importers/Direct
Atlantique Grains S.A	Wholesale /Retail/HRI	Importers/Direct
Graderco	Retail/HRI	Importers/Direct
Gromic	Wholesale /Retail/HRI	Direct
Sté Grains Mabrouka	Retail/HRI	Importers/Direct
Saiss Cereales	Retail/HRI	Importers/Direct
Moulins Lahlal	Wholesale /Retail/HRI	Importers/Direct
Fandy Copragri	Retail/HRI	Direct
Souss Cereales	Wholesale /Retail/HRI	Importers/Direct
Multigrain	Wholesale /Retail/HRI	Direct
Grands Moulins	Wholesale /Retail/HRI	Direct
Tria	Wholesale /Retail/HRI	Direct
Minoterie Amgala	Retail/HRI	Direct

Vegetable Oil/Refiners		
Lesieur Cristal	Wholesale /Retail/HRI	Direct
Les Huileries de Souss Bel Hassan Hsb	Wholesale/Retail/HRI	Direct
Les Conserves de Meknes Aicha	Wholesale /Retail/HRI	Direct
Baltimar	Retail/HRI	Importers/Direct
Comaner	Retail/HRI	Importers/Direct
Conserverie du Maroc Oriental	Retail/HRI	Importers/Direct

Dairy		
Centrale Laitiere	Retail/HRI	Direct
Copag	Retail/HRI	Importers/Direct
Stockpralim	Retail/HRI	Importers/Direct
Nestle Maroc	Retail/HRI	Importers/Direct
Safilait	Retail/HRI	Importers/Direct
Copragri S.A.	Wholesale/Retail/HRI	Importers/Direct
Coprallim	Wholesale/Retail/HRI	Importers/Direct
AFE Distributions	Retail/HRI	Importers/Direct
Comaner	Retail/HRI	Importers/Direct
Fromital	Wholesale/Retail/HRI	Importers/Direct
Fromageries Bel Maroc	Retail/HRI	Importers/Direct
Milk Products Morocco S.A.	Retail/HRI	Importers/Direct
Superfoods - International Trading	Retail/HRI	Importers/Direct
Margafrigue	Wholesale/Retail/HRI	Importers/Direct
Land'or Maroc	Wholesale/Retail/HRI	Importers/Direct

Dried Fruits and Nuts		
Morocco Peanuts	Wholesale/Retail/HRI	Direct
Comptoir Food	Wholesale/Retail/HRI	Direct
Maroc Delice	Wholesale/Retail/HRI	Importers/Direct
Eurodis	Retail/HRI	Importers/Direct

Fruit Orty	Retail/HRI	Importers/Direct
City Trade International	Retail/HRI	Local products/ Imports
Etablissement Bicha	Retail/HRI	Local products/ Imports
Frigo Baraka Sarl	Retail/HRI	Importers/Direct
Fruideli	Wholesale/Retail/HRI	Direct
Mix Food	Retail/HRI	Direct
Raji Freres	Retail/HRI	Importers/Direct
Sactal	Retail/HRI	Importers/Direct
Trapico	Retail/HRI	Importers/Direct

Prepared Fruits & Vegetables		
Ste Ouest Marocain	Retail/HRI	Importers/Direct
Les Fruits Dores	Retail/HRI	Importers/Direct
Atlantic-Gulf Company	Retail/HRI	Importers/Direct
Mabex S.A	Retail/HRI	Importers/Direct
Arbor- Frigos Tarik	Retail/HRI	Importers/Direct
Kantari (GROUPE)	Retail/HRI	Importers/Direct
Groupe Jamaï Domaines Agricoles	Retail/HRI	Importers/Direct

Chocolate & Cocoa		
Foods and Goods S.A.	Retail	Importers/Direct
Coprallim Maroc	Retail	Importers/Direct
Bimo Maroc	Retail	Importers/Direct
Jessy Diffusion	Wholesale /Retail	Importers/Direct
Biscoma	Retail	Importers/Direct
Best Biscuits	Retail	Importers/Direct

Poultry and Beef		
Koutubai SA	Retail/HRI	Direct
Maroc Dawajine	Retail/HRI	Direct
Engraissement Doukkala	Retail/HRI	Direct
Alf Sahel	Wholesale/Retail	Direct
Zalagh Holding	Wholesale /Retail	Direct
Dindy	Retail/HRI	Importers/Direct
King Generation	HRI	Importers/Direct
Foodis Maroc	Retail/HRI	Importers/Direct
La FONDA	Retail/HRI	Importers/Direct

Source: Industry websites, press

Attachments:

No Attachments