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Report Name: Food Processing Ingredients

Country: Morocco

Post: Rabat

Report Category: Food Processing Ingredients

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Report Highlights:

The Moroccan food processing market provides excellent opportunities for U.S. exporters seeking to expand their presence across Africa. Morocco's food processing industry accounts for 16 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 also provides preferential market access for many U.S. ingredients.

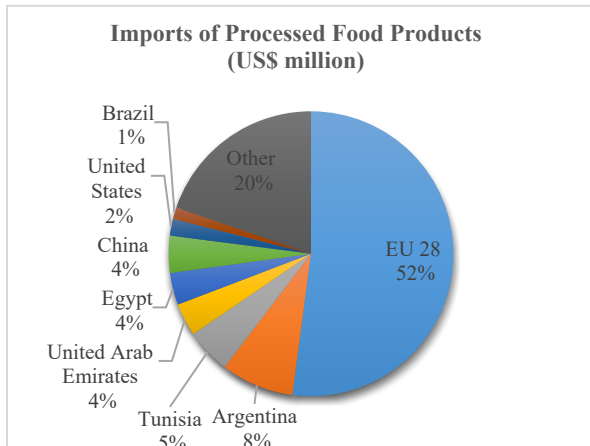
Post:
Rabat

Executive Summary

In 2019, the United States and Morocco negotiated terms for U.S. processed eggs market access, providing new opportunities for U.S. exporters to target the food processing sector. Best prospects include specialty wheat; fats and oils; prepared dairy products; poultry; beef; processed eggs; vegetables; food preparations; tree nuts; oilseeds; sweeteners and confectionary; chocolate; beer and alcoholic beverages.

Competition for Imported Food Processing Ingredients (2017-19 Average Imports)

The European Union is Morocco’s primary trading partner, and the source of over 50 percent of Morocco’s food processing ingredients imports.



Sources: *Global Trade Atlas, Office des Changes*

Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
<i>Morocco is one of the fastest growing economies in North Africa.</i>	<i>Distance and lack of shipping lines</i>
Opportunities	Challenges
<i>US-Morocco FTA provides access in Morocco and</i>	<i>Erosion of U.S. preferences vis-à-vis</i>

Quick Facts CY 2019

Food Processing Ingredient Imports: \$2.6 billion

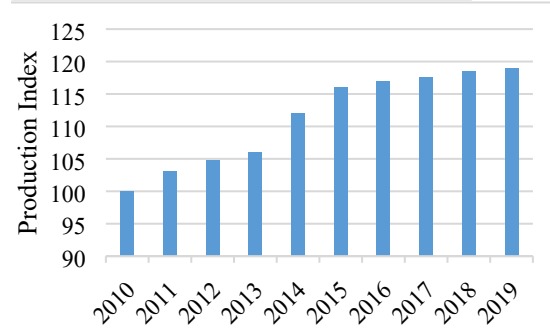
Top 10 Best Products

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

Food Trade (U.S. billion) 2019

Food Exports	\$4.4
Food Imports	\$5.5

Food Processing Industry Trends, 2010-19



Source: *Haut Commissariat au Plan*

Top 10 Food Processing Ingredients: See Annex.

GDP/Population (2019)

- Population (millions): 35.7
- GDP (billions USD): \$120
- GDP per capita (USD): \$3,370

Sources: [Morocco Office des Changes](#), [Morocco Haut Commissariat au Plan](#), [World Bank](#)

Contact:

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Section I: Market Summary

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.

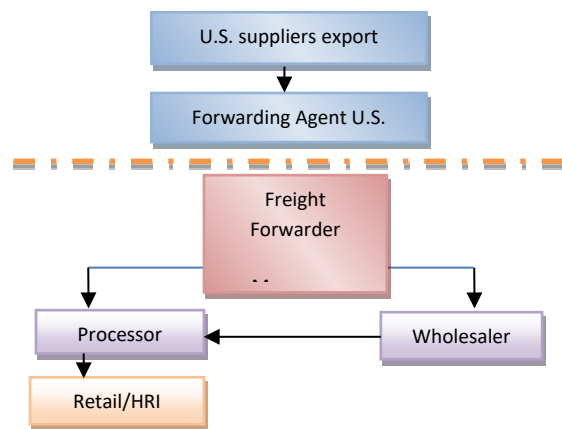
Morocco's food processing industry was valued at \$17.3 billion in 2018 (~16% of Morocco's GDP)¹. Sales are divided approximately 70% to retail and 30% to food service.

Section II: Road Map for Market Entry

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

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

Large Moroccan food processors import directly to control price and quality while most still procure ingredients through importers and local wholesalers.



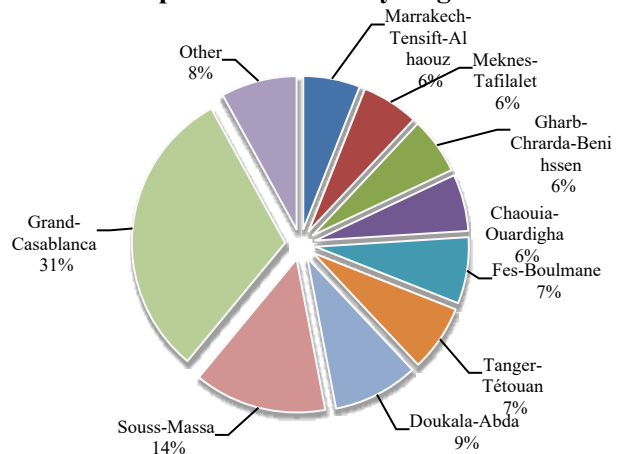
Trade Shows

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. 04-07, 2020)
- [Cremai Maroc](#),
- [MaroCarne & Milk](#)

Figure 1: Moroccan Food Processing Companies Morocco by Region



Source: Ministry of Industry, Trade, Investment and the Digital Econon

¹ Source: [National Federation of Food Processing Industry \(FENAGRI\)](#) and [High Commission for Planing](#)

Section III: Competition

Category	HS	Description	Average Imports (2017-19)			US Duty %	Top Foreign Suppliers
			World	USA	%		
Meat & Poultry	0201-0202	Beef, Chilled/Frozen*	\$32,644,446	\$954	0.0%	*	EU, Aust
	0207	Poultry, Chilled/Frozen*	\$1,253,979	\$54,669	4.4%	*	EU, Tuni, Braz
Dairy	040210	Non-fat Dry Milk	\$13,738,236	\$2,277,722	16.6%	0%	EU, Canad
	0404	Whey	\$49,772,117	\$6,377,465	12.8%	0%	EU, Argen, Turk
	040510	Butter	\$87,736,014	\$2,337,690	2.7%	0%	EU, Rus, Chin
	0406	Cheese	\$97,882,494	\$2,173,528	2.2%	0%	EU, Tuni, Egypt
Eggs	0408	Processed Eggs	\$1,324,993	\$9,648	0.7%	0%	EU, Ukra, India
Vegetables	070190	Potatoes, Fresh (not seed)	\$298,047	\$99,689	33.4%	0%	EU, Rus, Egypt
	0710	Vegetables, Frozen	\$764,818	\$28,616	3.7%	0%	EU, Peru, Egypt
	0712	Vegetables, Dried	\$1,685,383	\$78,335	4.6%	0%	EU, Egypt, India
	0713	Legum Veg, Dried Shelled	\$67,448,424	\$2,570,647	3.8%	0%	Canad, Egypt, EU
Fruits & Nuts	080211-080212	Almonds*	\$16,523,114	\$14,685,976	88.9%	*	Chile, EU, Chin
	080231-080232	Walnuts	\$25,371,236	\$10,412,702	41.0%	0%	Chile
	080250-080251	Pistachios	\$2,231,355	\$1,674,793	75.1%	0%	Iran
	080290	Other Tree Nuts (Pecans)	\$30,673	\$16,071	52.4%	0%	Tuni, EU, Aust
	080410	Dates	\$150,912,793	\$1,413	0.0%	0%	Tuni, Egypt, UAE
	080620	Raisins	\$6,016,287	\$0	0.0%	0%	India, Turk, Iran
Coffee, Tea, Spices	0902	Tea	\$222,389,347	\$59,413	0.0%	0%	Chin, India, Indo
	0904-0910	Spices	\$44,289,981	\$76,549	0.2%	0%	Chin, India, Braz
Cereals	1001	Wheat*	\$921,733,127	\$54,671,710	5.9%	*	EU, Rus, Ukr
	1006	Rice	\$17,353,041	\$2,432,683	14.0%	0%	India, EU, Thai
Milled Products	110630	Flours of Fruit/Tree Nuts	\$1,040,816	\$13,045	1.3%	0%	EU, Phili
	110812	Corn Starch	\$2,296,228	\$760	0.0%	0%	EU, Turk, Egypt
Oilseeds	1201	Soybeans	\$16,644,511	\$12,285,160	73.8%	0%	Urug, Ukra
	120600	Sunflower Seeds	\$5,036,900	\$846,676	16.8%	0%	Argen, EU
Other Plant Products	1302	Vegetable Saps, Extracts; Pectates; Agar-Agar	\$25,243,170	\$108,762	0.4%	0%	EU, India, Chin
Fats & Oils	1502	Fats Of Bovines, Sheep/Goats Other Than Head 1503	\$9,247,783	\$9,219,869	99.7%	0%	EU
	150710	Soybean Oil, Crude	\$392,396,161	\$11,103,497	2.8%	0%	EU, Argen, Rus
	150910	Olive Oil, Virgin	\$16,825,875	\$26,953	0.2%	0%	Tuni, EU
	151521	Corn Oil, Crude	\$4,445,836	\$319,099	7.2%	0%	Braz, EU
	151529	Corn Oil, Refined	\$9,255,741	\$250	0.0%	0%	EU
Prep Meat Products	1602	Prep/Pres Meat & Poultry Prods	\$13,593,797	\$208	0.0%	0%	EU, Braz, Rus
	1604	Prep/Pres Fishery Products	\$14,017,423	\$98,822	0.7%	0%	Seneg, EU, UAE
Sweeteners, Confectionary	170211-170219	Lactose	\$1,325,124	\$199,734	15.1%	0%	EU, Canad
	170230-170240	Glucose	\$3,869,968	\$54,969	1.4%	0%	Turk, EU, Egypt
	170490	Sugar Confection	\$10,507,758	\$68,484	0.7%	16.4%	EU, Turk, Egypt
Chocolate	1806	Chocolate & Cocoa Products	\$53,688,221	\$229,427	0.4%	16.4%	UAE, EU, Turk
	190120	Mixes & Doughs	\$2,591,977	\$5,585	0.2%	16.4%	EU, Turk, UAE
Prep/Pres Cereals	1904	Food Preps of Cereals	\$15,866,936	\$20,654	0.1%	0%	EU, Chin, Egypt
	200190	Prep/Pres Veg/Fr/Nut by Vinegar	\$731,049	\$1,544	0.2%	0%	Chin, EU, Ecu
Prep/Pres Fruit, Veg	200290	Tomato Paste	\$10,494,102	\$0	0.0%	0%	Egypt, EU, Chin
	2005	Prep/Pres Vegetables, Not Frozen	\$15,608,727	\$193,191	1.2%	0%	Chin, EU, Turk
	2008	Prep/Pres Fruits & Nuts	\$11,466,637	\$238,263	2.1%	0%	EU, Egypt, Thai
	200911-200919	Orange Juice	\$6,089,613	\$47,719	0.8%	0%	Egypt, Braz, EU
	2102	Yeasts; Baking Powder	\$7,990,062	\$2,995	0.0%	0%	EU
Food Products	2103	Sauces & Condiments	\$25,359,784	\$763,941	3.0%	0%	EU, Chin, Egypt
	210610	Protein Concentrates	\$6,836,895	\$5,207,139	76.2%	0%	EU, Egypt, Turk
	210690	Food Preparations	\$74,777,162	\$3,306,383	4.4%	0%	EU, Egypt, Turk
	Vinegar	220900	Vinegar	\$1,711,240	\$16	0.0%	0%
Odoriferous Mixtures	3302	Odoriferous Mixtures	\$74,357,182	\$416,312	0.6%	0%	EU, Egypt, Aust
Proteins	3501	Casein & Caseinates	\$12,593,891	\$33,620	0.3%	0%	EU, India

*Subject to Tariff Rate Quota (see the [U.S.-Morocco Tariff Schedule for 2020](#))

Section IV: Best Product Prospects

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

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.

Agricultural Affairs Office

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Annex

Major Moroccan Food Processing Companies, by Sector

Company Name	Sales 2016 (mill USD)	End-User Channels	Procurement Channels
Cereals			
A&m Intercommodity	N/A	Retail/HRI	Importers/Direct
Casa Grains	\$280	Retail/HRI	Importers/Direct
Copragri S.A.	\$335	Retail/HRI	Importers/Direct
Glencore-Grain Maroc S.A.R.l	N/A	Wholesale /Retail/HRI	Importers/Direct
Atlantique Grains S.A	\$450	Wholesale /Retail/HRI	Importers/Direct
Graderco	\$150	Retail/HRI	Importers/Direct
Gromic	\$130	Wholesale /Retail/HRI	Direct
Sté Grains Mabrouka	<\$100	Retail/HRI	Importers/Direct
Saiss Cereales	<\$100	Retail/HRI	Importers/Direct
Moulins Lahlal	N/A	Wholesale /Retail/HRI	Importers/Direct
Fandy Copragri	\$325	Retail/HRI	Direct
Souss Cereales	N/A	Wholesale /Retail/HRI	Importers/Direct
Multigrain	\$45	Wholesale /Retail/HRI	Direct
Grands Moulins	\$30	Wholesale /Retail/HRI	Direct
Tria	N/A	Wholesale /Retail/HRI	Direct
Minoterie Amgala	\$22	Retail/HRI	Direct

Vegetable Oil/Refiners			
Lesieur Cristal	\$390	Wholesale /Retail/HRI	Direct
Les Huileries de Souss Bel Hassan Hsb	\$360	Wholesale/Retail/HRI	Direct
Les Conserves de Meknes Aicha	\$45	Wholesale /Retail/HRI	Direct
Baltimar	\$7	Retail/HRI	Importers/Direct
Comaner	\$12	Retail/HRI	Importers/Direct
Conserverie du Maroc Oriental	\$45	Retail/HRI	Importers/Direct

Dairy			
Centrale Laitiere	\$690	Retail/HRI	Direct
Copag	\$450	Retail/HRI	Importers/Direct
Stockpralim	\$160	Retail/HRI	Importers/Direct
Nestle Maroc	\$123	Retail/HRI	Importers/Direct
Safilait	\$89	Retail/HRI	Importers/Direct
Copragri S.A.	\$851	Wholesale/Retail/HRI	Importers/Direct
Coprallim	\$46	Wholesale/Retail/HRI	Importers/Direct
AFE Distributions	\$30	Retail/HRI	Importers/Direct
Comaner	\$10	Retail/HRI	Importers/Direct
Fromital	\$6	Wholesale/Retail/HRI	Importers/Direct
Fromageries Bel Maroc	\$170	Retail/HRI	Importers/Direct
Milk Products Morocco S.A.	\$15	Retail/HRI	Importers/Direct
Superfoods - International Trading	\$40	Retail/HRI	Importers/Direct
Margafrique	\$55	Wholesale/Retail/HRI	Importers/Direct
Land'or Maroc	N/A	Wholesale/Retail/HRI	Importers/Direct

Dried Fruits and Nuts			
Morocco Peanuts	N/A	Wholesale/Retail/HRI	Direct
Comptoir Food	N/A	Wholesale/Retail/HRI	Direct
Maroc Delice	\$1-5	Wholesale/Retail/HRI	Importers/Direct
Eurodis	\$1-5	Retail/HRI	Importers/Direct
Fruit Orty	\$1-5	Retail/HRI	Importers/Direct
City Trade International	N/A	Retail/HRI	Local products/ Imports
Etablissement Bicha	N/A	Retail/HRI	Local products/ Imports
Frigo Baraka Sarl	N/A	Retail/HRI	Importers/Direct
Fruideli	N/A	Wholesale/Retail/HRI	Direct
Mix Food	N/A	Retail/HRI	Direct
Pistacherie Rayane SARL	N/A	Retail/HRI	Importers/Direct
Raji Freres	N/A	Retail/HRI	Importers/Direct
Ratra	N/A	Retail/HRI	Importers/Direct
Sactal	N/A	Retail/HRI	Importers/Direct
Trapico	N/A	Retail/HRI	Importers/Direct

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

Chocolate & Cocoa			
Foods and Goods S.A.	\$52	Retail	Importers/Direct
Copralim Maroc	\$38	Retail	Importers/Direct
Bimo Maroc	N/A	Retail	Importers/Direct
Jessy Diffusion	N/A	Wholesale /Retail	Importers/Direct
Biscoma	N/A	Retail	Importers/Direct
Best Biscuits	N/A	Retail	Importers/Direct

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

Source: Industry websites, press

Attachments:

No Attachments