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Morocco

Exporter Guide

2016

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Report Highlights:

The exporter guide provides an overview of the political and economic situation in Morocco, as well as the general business and agricultural trade environment. Morocco's economic and political situation continues to be stable. In 2015, Morocco imported over \$313million of U.S. food and agricultural products, representing 7 percent of Morocco's total agricultural imports. Intermediate products accounted for over 54 percent of total U.S. agricultural exports. U.S. agricultural best prospects include soybean complex (whole, oil, meal), distillers grains (DDGS), dried fruits and nuts (pistachios, walnuts, non-pitted prunes, raisins, and almonds), dairy (milk powder, whey, cheese, butter), confectionary items and frozen seafood.

Acronyms used in this report are the following:

DCQ	Direction du Contrôle de la Qualité
DDGS	Distillers Grains
FTA	Free Trade Agreement
EU	European Union
GDP	Foot and mouth disease
GOM	Government of Morocco
NPLs	Nonperforming Loans to Total Gross Loans
ONSSA	National Office for Food Safety
ONICL	National Cereal office
TRQ	Tariff Rate Quota
PJD	Justice and Development Party

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Section I: Market Overview

Current Political and Economic Situation

Morocco's general economic and political environment is stable, as confirmed by international rating agencies. In 2011, Morocco instituted a wide range of reforms, with the adoption of a new constitution and the country's first parliamentary election. The moderate Islamist-leaning Justice and Development Party (PJD) won the lion's share of seats in parliament, allowing it to form the country's first post-Arab Spring government. Reform has been piecemeal with slow and winding ratification of laws mandated by the constitution. In 2015, long overdue local and regional elections were held. These elections paved the way for further regionalization and decentralization. In October 2016, Morocco held its second general elections, which resulted in the PJD party increasing its seats in Parliament from 107 to 125. The King again appointed the head of the PJD party, Mr. Abdelilah Benkirane, as the Head of Government (Prime Minister) for the second time in succession, and charged him with forming a government by the end of 2016. The economy has strong prospects for growth and the government is endeavoring to develop the business climate and encouraging private investment, despite the shortcomings of weak intellectual property rights and lengthy bureaucratic practices.

On December 5, 2012, Morocco and the United States signed an agreement to facilitate and enhance trade exchanges. This agreement calls for new transparency standards between the two nations to facilitate export procedures for both small and large enterprises and reinforces the United States-Morocco Free Trade Agreement (FTA) that went into effect on January 1, 2006. The FTA has allowed the United States to recapture significant market share in many commodities, and also to increase exports of several other commodities previously limited or restricted by high import duties. Trade data indicate that the U.S. trade surplus with Morocco went from \$49 million in 2005 to a high of \$1.8 billion in 2011 and then down to \$548 million in 2015.

U.S. agricultural exports to Morocco, from January to October 2016, totaled \$293 million, indicating a 7.4 increase in exports over the same period the year before. Morocco's import tariff rates are generally high, but with the U.S.-Morocco Free Trade Agreement (FTA), now in its tenth year of implementation, as of January 1, 2016, there will be further duty reductions for most U.S. agricultural products. The staged tariff reductions built into the FTA will offer greater incentives to U.S. exporters for exporting to this market.

Table 1: United States Exports to Morocco (in \$ million)

	201 1	201 2	201 3	201 4	201 5	Jan - Aug 2015	Jan - Aug 2016	Period/ Change
Product	Val ue	Val ue	Val ue	Val ue	Val ue	Value	Value	%
Oilseeds & Products	582. 6	438. 0	176. 2	127. 5	174. 9	138.6	85.9	-38
Grains & Feeds	196. 6	68.1	79.2	96.4	87.2	76.3	104.5	37
Cotton, Linters & Waste	58.8	53.1	43.6	42.9	21.2	21.2	0	--
Horticultural Products	10.6	12.5	16.4	14.7	11.1	7.1	7.0	-1
Livestock & Meats	19.5	12.0	5.1	7.7	4.9	2.2	4.4	100
Dairy & Products	56.1	72.2	114. 1	97.1	4.7	4.1	2.7	-35
Planting Seeds	3.4	3.1	2.5	2.2	1.4	0.80	1.7	110
Sugar & Tropical Products	1.2	1.0	0.78	20.7	0.76	0.60	0.22	-62
Poultry & Products	0.89	0.56	0.73	1.7	0.74	0.66	1.5	136
Tobacco & Products	0	0	0	1.0	0	0	0	--
Agricultural Total	930. 1	660. 8	438. 9	412. 1	307. 1	251.7	208.1	-17

Source: USDA/GATS

The agricultural sector represents a significant share of Morocco's GDP at between 13 and 21 percent annually. Agricultural output fluctuates greatly from year to year, it being largely dependent on rainfall and climate factors, with only 16 percent of Morocco's total arable land irrigated. Thus, agricultural growth has varied from 11 to minus 1 percent, largely owing to lack of rainfall. During MY 2015/16, Morocco experienced a severe drought, resulting in a 70 percent decline in grain production from the previous year. Cereal production for MY 2015/16 was only 3.35 million MT in contrast to 11.5 million MT the year before. The production total for common wheat (a major staple) was only 1.86 million MT. In order to avert a food crisis, on September 20 and 21, Morocco's Cereals Office (ONCIL) under the Ministry of Agriculture solicited bids from importers for licenses to import common wheat under the TRQ. The U.S. tender was set at 300,000 MT and filled at 235,000 MT. ONCIL again issued a tender for U.S. common wheat under the TRQ, on September 28, and received offers for 303,637 MT when bids opened on October 5. As a result, Morocco has agreed to import an additional 260,000 MT of U.S. common wheat under the preferential TRQ of the FTA, which currently has a tariff rate of only 9.9 percent compared to tariff rates of 65 or 30 percent outside the TRQ.

In April 2008, the Ministry of Agriculture launched a new strategy for agricultural development in Morocco. Over the past eight years of implementation, the strategy has been successful in increasing overall agricultural production levels by 40 percent. The "Green Morocco Plan," as it is known, calls

for a reform of water policy, food standards, marketing, and other topics. The strategy is based on two pillars:

Pillar I

- To accelerate the development of agriculture value-added by fostering investment, providing preferential access to land and finance, and facilitating logistics, branding, quality management and research and development.

Pillar II

- Based on solidarity, Pillar II encourages aggregation of small farmers into integrated, viable entities

Morocco has been liberalizing its economy and trade. Prices of virtually all consumer oriented products are market driven. There is little government involvement in imports and processing of food products, particularly consumer-oriented products. The Government of Morocco (GOM) is most involved in the sugar processing industry, although all sugar beet and cane mills are scheduled to be privatized. The GOM has completely phased out the vegetable oil subsidy but continues to significantly subsidize sugar and some wheat flour at the retail level in order to make these products affordable to low-income consumers.

Banking System

Morocco has a well-developed banking system. Most banks are private and have correspondent banks in Europe and the United States. Foreign currency is readily available to importers upon presentation of the appropriate import documents. Although the use of Letters of Credit is common, many importers prefer to shift to payments against documents after the first few operations. The current regulation authorizes up to 40 percent of the FOB value as advance payment for import operations, but most regular importers prefer not to take this risk.

Morocco is working on a strategic economic plan to enhance its financial sector. Two Moroccan banks, Attijariwafa Bank and Groupe BCP, ranked among the 10 largest financial institutions in Africa and their influence looks set to spread. Another Moroccan bank, Banque Populaire, recently opened a branch in Mali and in the United States (Washington, DC), and some Moroccan banks are now investing in mining projects as far afield as the Congo, in competition with the five big South African banks which dominate the continent.

Access to credit appears to be getting more difficult. Euromonitor reported Morocco's 2016 ranking for getting business credit at 109 out of 189; this is in contrast to a ranking of 87th out of 183 nations in 2010. Since 2011, there have been no major reforms to make access to credit any easier for businesses. Despite this, Morocco's 2016 ranking is among the top five of the region, signaling that credit markets are even tougher in neighboring countries. Morocco's bank nonperforming loans (NPL) to total gross

loans rate in 2015 was slightly higher than that of 2010, due to an increase in mortgage defaults. The NPL rate for 2015 is below that of Egypt, Algeria and Tunisia, thanks to the relative stability and financial soundness of Morocco's banking sector.

Key Demographic Development

Morocco's population is estimated at about 33 million, of which about half lives in rural areas. The population growth rate is currently about 1.5 percent per year with an estimated 55 percent of the population under 25 years old. The middle class is steadily increasing and family size is becoming smaller, with an average of 3-4 children. The illiteracy rate is about 32 percent, although much higher in rural areas. Islam is the prevailing religion (over 97 percent) and Arabic the dominant language. While Moroccans understand classical Arabic, they typically speak the local dialect (Darija) which classical Arabic speakers may find hard to understand. French is the language most widely used in business.

For the most part, Moroccan home cooking remains traditional, but change is coming, especially in large cities where there is a tendency for young families to adopt a western lifestyle. The number of women working outside the home is steadily increasing, leading to higher income for the family, but also forcing members, when they can afford it, to turn to ready to eat or semi-processed products instead of traditional, time-consuming, homemade dishes. This is especially true in large cities like Casablanca, Rabat, Marrakech, Fes, Agadir, and Tangier, where distribution channels have significantly developed in recent years. Today, local producers and importers of consumer oriented food products are able to deliver many new quality products to consumers in modern supermarkets.

Consumer Spending

The bulk of the demand for consumer oriented food products comes from large cities where the population with higher income and more modern lifestyle lives. An estimated 10 percent of the population (3.3 million) can afford to buy imported products and spend nearly 11 times more than the 10 percent of the population with the lowest income.

Eating habits for working Moroccans have changed, with the establishment of a labor law in 2005 that changed the working hours (no extended mid-day break) for public and private sector institutions. Working Moroccans no longer return home for the mid-day meal, and instead eat their lunch at restaurants and fast food places. This has led to a significant increase in the number of restaurants and fast food outlets in Morocco in the last few years.

Table 2: Advantages and Challenges

Advantages	Challenges
The United States and Morocco have a free trade agreement that reduces import tariffs.	Morocco has free trade agreements with an increasing number of countries; notably UAE, the EU, Turkey, and several Arab countries.
Local production fluctuates widely with the weather, which makes Morocco dependent on imports.	Geographical disadvantage. Morocco is only a few miles from Europe. Therefore, U.S. shipping cost is much higher.
Many high value food products are not known to the Moroccan consumer, which means there is room for many new products.	French is the predominant language of commerce. Moroccan importers traditionally do business through European brokers and traders.
The local food industry is upgrading and becoming more demanding on quality and regularity of supply.	Many products that are common in the United States are not known in Morocco.
Increasing middle class. Increasing number of women working outside the home. Modernizing lifestyle.	Limited purchasing power of the Moroccan consumer. Only an estimated 10 % of the population (3 million) is able to buy imported products on a regular basis.
Fast developing modern distribution channels offering room to develop new branded products.	Traditional distribution networks are still predominant for many food products, particularly in rural areas.
Western culture attracts youth. FAS/USDA offers free trade servicing to exporters visiting Morocco.	Because of the relatively high customs duties for most products, many benefits of the FTA will only be realized in the medium to long term.
American products are synonymous with quality in most cases.	Lack of knowledge about U.S. supplies, industry, standards and grades.

Section II: Exporter Business Tips

- Most importers are located in Casablanca and imports by container are mostly done through the port of Casablanca.
- For food standards and regulations, including food labeling, see GAIN Report: Food and Agricultural Imports Regulation and Standards Report (FAIRS) at MO1516
<http://www.fas.usda.gov/data/morocco-fairs-country-report>
- For export certificates required by Morocco, please refer to MO1505
<http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Certification%20Rabat%20Morocco%209-17-2015.pdf>

- In all major ports and airports, the Ministry of Agriculture has one stop shops for importers to clear all types of imported agricultural products. The entity in charge is the DCQ (Quality Control Division) which is a regional representative of the National Office for Food Safety (ONSSA). To clear Customs, importers must present a sanitary certificate for all fresh fruits, and animal or vegetable products they import. A local laboratory analysis done by official laboratories may also be required to clear customs, especially for new and unfamiliar imported products.
- Often Moroccan importers are not familiar with products that are common in the United States. Also, many importers are not used to U.S. grades, standards and appellations. Exporters are advised to provide pictures, brochures, or even samples to Moroccan importers. Many local importers require samples before making purchase commitments.
- Moroccans use only the metric system for measurement.
- Although an increasing number of Moroccan importers can communicate in English, French is still the predominant language of commerce. Exporters with French capabilities or French written promotional materials will definitely have an advantage when communicating with importers.
- Importation and distribution of food and beverage products in Morocco are handled by both regular importers and importers who operate on an opportunity basis. Regular importers market their products through their own sales force (typically to hotels, supermarkets, wholesalers) and independent well-established wholesalers (in the case of small shops, restaurants). U.S. exporters interested in selling consumer-ready food or beverages should find a local importer to access the retail market. Importers normally have in-depth knowledge of specific importing procedures.
- Telecommunication services are generally adequate. Internet and email are available in most hotels and internet cafe shops throughout Morocco. Phone calls from hotels can be excessively expensive, but cell phone and reusable phone cards can be purchased locally at very reasonable prices.
- The holy month of Ramadan is not a holiday but business slows down significantly because Muslims fast during the day. Most restaurants close during this month; alcohol is not served and people are not allowed to smoke during the day. Exporters should avoid visits during Ramadan, but if travel is unavoidable during this period, exporters should hold their meetings in the morning. Consumption of some products (e.g. honey, sugar, butter, vegetable oil, dairy products, etc.) increases during Ramadan. In 2017, Ramadan will begin on Saturday, May 27 and last for 30 days until Sunday, June 25.

Section III: Market Sector Structure and Trends

The limiting factor to increasing demand for consumer oriented products is low income.

U.S. exports of consumer products to Morocco in 2015 were valued at \$2.1 billion, down 16.7 percent from the year before. Morocco was the 64th largest export market for U.S. goods, in 2015.

Correspondingly, U.S. imports from Morocco were \$1 billion, up 1.9 percent from the year before.

U.S. goods trade surplus with Morocco was \$598 million in 2015, a decline of 46 percent (\$512 million) from 2014.

Although retail food outlets in Morocco continue to be dominated by a large number of small grocery stores (over 90 percent of stores are less than 225 square feet), the number of supermarkets has grown considerably in recent years and more are under construction, particularly in large cities. Retailing is seeing growth through mass distribution players, such as Marjane Holding, which leads the hypermarkets category, with a 48 percent value share in 2015, and Carrefour (Label'Vie) with a 24 percent market share. Supermarkets are privately owned and some have been opened by multinational chains or as joint ventures with Moroccan investors. Over the last few years a number of modern self-service retail outlets and convenience stores have also opened in major cities and this trend is likely to continue.

Importers play a major role in the introduction, marketing, and distribution of imported foods throughout the country. Except for the two largest supermarket chains that, in addition to buying from importers, also import directly through their buying platforms in Europe, all supermarkets get their products either directly from importers or from wholesalers. It is not uncommon for importers to also be wholesalers. Many importers prefer direct contact with suppliers as they feel middlemen complicate transactions, lower profits, and may also work with competitors. Most Moroccan importers like to buy on samples. Internet sales are virtually non-existent for food products.

Moroccans are regularly exposed to Western culture in their daily life, especially through television; Morocco has an estimated 1 million TV satellite dishes. Thus, the steady Western influence on Morocco's lifestyle is expected to result in even higher demand for consumer-oriented products in future.

U.S. exports of consumer-oriented products will continue to be dampened by the high freight costs and length of shipping time. The small size of the Moroccan market can be partly serviced through consolidated shipments from the United States, but it will continue to favor small shipments from neighboring countries in Europe (France, Spain, Italy, etc).

The Moroccan food industry is dominated by a large number of small family enterprises that average less than 50 employees. The government still owns some food processing units, particularly sugar processing mills and alcoholic beverage manufacturing. Moroccan processed food exports are mostly processed and canned fruits and vegetables, and processed fish, including canned fish.

High Value Products for Food Processing Sector:

The United States has a greater potential to export semi-finished products and products for industrial uses such as milk powder, cheese, processed nuts, and other ingredients. The FTA offers great opportunities to sell U.S. ingredients in Morocco. Although local processors have improved and diversified their production significantly over the past few years, the range of products being put on the market is still very small and is unlikely to satisfy all the demand. Local producers are becoming more quality conscious; U.S. suppliers can play a major role in fulfilling the demand for regular quality products. Most food processors purchase their ingredients from well-established importers or from local agents of multinationals. Very few large processors purchase their ingredients directly from exporters abroad. Thus, U.S. exporters are advised to go through local suppliers of ingredients to be able to use their distribution network. The local industry is committed to developing further in order to withstand stiffer competition from imports. Many local producers (biscuit manufacturers, confectioneries, canneries, etc.) have started offering a new range of products to maintain their market share and compete with imported products.

High Value Products for Hotels, Restaurants, and Institutional (HRI):

Morocco's tourism industry has seen significant growth in recent years. In 2015, Morocco received over 11 million visitors, mostly tourists from Europe, but also some from the United States. This was in addition to the 4.4 million Moroccans living overseas (Europe) who tend to visit between July and August each year. The GOM, having achieved its target of 10 million tourists by 2010, is now aiming for a target of 20 million tourists by 2020. Construction of large modern hotels is ongoing throughout the country. This should certainly lead to a boost in demand for hi-value foods packaged for services.

Although there are over 3,199 hotels in Morocco, the potential market for U.S. consumer-oriented products lies in the 60 to 77 upscale hotels (5 stars) concentrated mostly in Marrakech, Agadir, Tangier, Casablanca, Rabat, and Fes, as well as with the 187 hotels graded as 4 stars and the 45 tourist villages and clubs. Most other hotels cater to lower income customers and don't regularly offer imported food and beverages to their clients. Most hotels purchase their food products from local distributors, who are also often importers. U.S. suppliers should try to work with these distributors to enter this market, as hotels and hotel chains managements are rarely willing to get involved in import operations because of the small volume involved.

Morocco has an estimated 500 restaurants categorized as Moroccan, Asian, western-style and other specialty. Restaurant categorization is mandatory as stipulated by the law 61-00, which regulates touristic establishment status. Restaurants may potentially use imported products on a regular basis, but most tend to buy directly from local distributors/importers because of the low volume involved. U.S. exporters are strongly encouraged to go through established importers that have their own sales network.

Export of Seafood Products to Morocco

In 2015, Morocco imported about \$ 174 million of fish and seafood products, so there is a window for some U.S. seafood products. This is made even more advantageous by the tax exemption for seafood products that went into effect on January 1, 2016 when the FTA entered its tenth year. The demand for seafood will come mostly from upper class hotels and restaurants located in major cities. Per capita fish consumption is low in Morocco and consists mostly of fresh low-priced pelagic species such as sardines. Inadequate distribution channels have been the major limiting factor to increased fish consumption. Thus, few importers have appropriate facilities and refrigerated trucks to supply frozen food to supermarkets. Moreover, very few supermarkets are equipped to handle and exhibit frozen or refrigerated fish.

New exporters are advised to work closely with already established frozen food importers that are also distributors in order to use their distribution network and experience. The volume of seafood used by hotels and restaurants remains relatively low, and thus it is still more beneficial for them to purchase from local distributors. U.S. suppliers can work closely with the local distributor to carry on promotional activities in selected hotels, restaurants, and supermarkets.

Fast Food - Franchising

American fast food outlets have been some of the most successful businesses in Morocco in recent years. For example, McDonald's, Pizza Hut, Domino's Pizza, Kentucky Fried Chicken, TGI Friday's and Burger King have all opened over the past 10 years. More outlets are scheduled to open in the near future in response to the higher demand for quality "western style" food. The rapid growth in this sector stems from major economic changes in Morocco, including economic growth, higher disposable income, and the increased number of women working outside the home. The development of U.S. fast food outlets in Morocco has resulted in an increase in imports of food ingredients, including from the United States, which the local industry is unable to provide on a regular basis. The US-Morocco FTA will play a positive role in increasing this opportunity as many food ingredients (cheese, chicken nuggets, etc.) have significant preferential access to the Moroccan market under the FTA.

Section IV: Best High Value Product Prospects

The following agricultural products are the Foreign Agricultural Service's pick for best prospects:

- Feed: Corn Gluten
- Feed: Distillers Grains (DDGS)
- Crude vegetable oil (Soybean oil)
- Oilseeds and products (soybean grains and meal)

- Milk powder, unsalted butter, whey, cheese for pizza
- Dried fruits and nuts (pistachios, walnuts, non-pitted prunes, raisins, and almonds)
- Confectionary items
- Rice
- Seafood/frozen
- Canned products

Section V: Key Contacts and Further Information

The Foreign Agricultural Service's website (FAS/USDA): www.fas.usda.gov

The Office of Agricultural Affairs at the American Embassy in Rabat provides trade servicing and information about the Moroccan market. The free service provided by this office includes providing market briefings, market tours, lists of importers, setting up agendas and meetings, hotel reservations, and in some cases providing translations and transportation.

U.S. Embassy / USDA - Foreign Agricultural Service Contacts:

Ms. Valerie, Ralph Agricultural Attaché

Email : Agrabat@fas.usda.gov

Phone: (212) 537 668 024

Fax: (212) 537 765 493

Address: American Embassy, km 5.7 Avenue Mohamed VI, Souissi-Rabat 10170

For Additional information of the US-Morocco FTA please visit:

<https://ustr.gov/trade-agreements/free-trade-agreements/morocco-fta/final-text>

Local Contacts:

Ministère de l'Agriculture et de la Pêche Maritime

Direction General de l'Office National la Sécurité Sanitaire des Produits
(ONSSA)

Alimentaires

Avenue Haj Ahmed Cherkaoui- Agdal-Rabat- Morocco

Phone: (212-53) 768-1351/ (212-67) 539-9451

Fax: (212-53) 768-20 49

Link to ONSSA's contact list:

http://www.onssa.gov.ma/onssa/fr/doc_pdf/page_de_contact.pdf

Direction du Contrôle de la Qualité (DCQ) - Port Casablanca

Port de Commerce de Casablanca, Morocco

Phone: (212-52) 231-7047 Fax: (212-52) 231-8648

Email: dcqpfc@hotmail.com

Ministère de l'Agriculture et de la Pêche Maritime
Direction de Développement des Filières de Production (DDFP)
Station Dbagh, Av. Hassan II, BP.595; Rabat, Morocco
Phone: (212-53) 769-4200/ (212-53) 769-9945 Fax : (212-53) 769-0015
Email: ddfp09@gmail.com

Ministère de l'Economie et des Finances - Direction des Douanes
Hay Ryad, Rabat, Morocco
Phone: (212-53) 771-7800/771-7801 Fax : (212-53) 771-7814/771-7515
Website: <http://www.douane.gov.ma>
CUSTOMS OFFICE, TAX, CUSTOMS DUTIES

Office des Foires et des Expositions de Casablanca (OFEC)
Rue Tiznit, In front of Hassan II Mosque, Casablanca, Morocco
Phone: (212-52) 220 1157 - Fax: (212-52) 226-4949
Email: foire@ofec.ma
Website: www.ofec.co.ma
FAIR, SHOWS, FOOD SHOWS

Hotels:

Hotel Sheraton-Casablanca

Phone: (212-52) 231-7878/243-9494
Fax: (212-52) 231-5136/231-5137
Avenue des F.A.R., Casablanca, Morocco

Hyatt Regency-Casablanca

Phone: (212-52) 226-1234
Fax: (212-52) 220-4446
Avenue Hassan II, Casablanca, Morocco

Hotel Royal El Mansour

Phone: (212-52) 231-2112
Fax: (212-52) 231-4818
Avenue des F.A.R., Casablanca, Morocco

Holiday Inn Crown Plaza

Phone: (212-52) 229-4949/229-3434
Fax: (212-52) 229-3029/229-3035
Avenue Hassan II, Casablanca, Morocco

Sofitel Rabat

Phone: (212-53) 7 675 656
Fax : (212-53) 7 671 492
450 Souissi – Rabat / Maroc

Workdays / Hours:

- Working days in Morocco are Monday through Friday.
- Morocco is on Greenwich Mean Time.
- Typically, working hours are 8:30 am -16 pm.

On Fridays (the prayer day), administration and some private companies' working hours are: 8:30-11:30 and 3:00 pm - 6:30 pm.

- Visits during August should be avoided because many businesses close for vacation.

Holidays: Religious holidays follow the lunar calendar and thus move back 11 days every calendar year. Below are Moroccan holidays for the coming year:

Table 3: Holidays Schedules for 2017

DATE	DAY(S)	HOLIDAY
January 1	Friday	New Year
January 11	Monday	PRESENTATION OF MOROCCAN INDEPENDENCE PROCLAMATION
July 7/8	Thursday/Friday	AID AL FITR (Celebration of end of Ramadan)
September 11	Sunday/Monday	AID AL ADHA (Feast of Abraham's Sacrifice)
October 1	Saturday	FIRST MOHARRAM (Muslims' New Year)
November 18	Friday	FEAST OF INDEPENDENCE (to celebrate Morocco's independence in 1956)
December 12	Monday/Tuesday	AID MAWLID AN NABBAOUI (to celebrate the birthday of prophet Mohammed)

(*) A lunar-based Moroccan holiday; the actual date may vary.

Table A: Key Trade & Demographic Information for Morocco

Agricultural Imports From All Countries (million \$) / U.S. Market Share (%)	4186	8
Consumer Food Imports From All Countries (million \$.) / US Market Share (%)	836	3
Edible Fishery Imports From All Countries (million \$) US Market Share (%)	174	<1
Total Population (Millions) / Annual Growth Rate (%)	33	1%
Urban Population (Millions) / Annual Growth Rate (%)	60.2%	2.26%
Number of Major Metropolitan Areas (a)	12	
Per Capita Gross Domestic Products (\$U.S.)	\$3237.83	
Unemployment Rate (%)	9.1%	

Per Capita Food Expenditures (\$U.S.) (b)	\$1176
Percent of Female Population Employed (%)	27
Indicative Exchange Rate (Average for Calendar Year 2015)	10.2 dirham's

Source: GATS, Morocco office de change, and High planning commission office.

Table B: Consumer Food & Edible Fishery Products Imports CY 2014-2015 (in millions \$)

Commodity	Total Morocco Imports		Imports from USA	
	2014	2015	2014	2015
CONSUMER ORIENTED	1,137	836	1.1	1.7
Snack Foods (Excluding Nuts)	74	59	0.2	0.1
Breakfast Cereals and Pancake Mix	11	10	0.01	0.04
Red Meats Fresh/Chilled/Frozen	48	17	0.03	0
Red Meats Prepared/Preserved	9.2	6.6	0.2	0
Dairy Products (Excluding Cheese)	313	140	91	7
Tea	189	196	0	0.1
Cheese	80	65	13.6	2.2
Eggs & Products	0.5	0.7	0	0
Fresh Fruit	149	151	0.3	0
Fresh Vegetables	40.9	40.4	0	0.01
Processed Fruit and Vegetables	65	61	2.4	1
Tree Nuts	13.6	9.4	13	9
Wine and Beer	18	14	0.8	1.1
Nursery Products & Cut Flowers	49.7	43.5	0.4	0.8
Pet Foods (Dog and Cat Food)	6	5.8	0.3	0.3
Other Consumer Oriented Products	242	200	9.3	6.5
Coffee	2.5	2.1	0	0.02
FISH & SEAFOOD PRODUCTS	199	174	0.4	0.5
Salmon	5.3	6.8	0	0
Crustaceans	102	92	0	0
Molluscs	16.8	15.5	0.2	0.4
Other Fishery Products	14	37	0	0.1
AGRICULTURAL PRODUCTS TOTAL	5,653	4186	462	339
AGRICULTURAL FISH & FORESTRY TOTAL	6,387	4,827	465	342

Source: GTA/ Moroccan Customs Data

Table C: Top 15 Suppliers of Consumer Food & Edible Fishery Products Morocco Imports (in millions \$)

Consumer Oriented Product Import by Country of Origin			Fish & Seafood Products Imports by Country of Origin		
Partner Country	2014	2015	Partner Country	2014	2015

	USD	USD		USD	USD
Total Imports	1,137	836	Total Imports	199	174
France	158	116	Netherlands	56	52
Spain	104	95	Spain	17	21
Tunisia	64	60	China	23	22
Netherlands	100	70	Greenland	13	12
New Zealand	59	44	Canada	14	13
United Arab Emirates	37	44	Argentina	8	7
Egypt	54	41	Norway	8.6	7.1
Italy	36	34	Senegal	4	4.8
United States	131	24	Vietnam	6	3.8
Germany	36	30	Peru	1.7	2.7
Belgium	36	23	Ecuador	3.1	2.6
Portugal	22	19	Belgium	5.6	1.2
Australia	43	11	France	3.6	1.8
Ireland	6	12	United Arab Emirates	1.2	1.5
India	16	16	Germany	1.8	1.4
China	15	14	Croatia	1.2	1.5
United Kingdom	10	11	Portugal	1.6	2.9
Turkey	20	13	Cote d Ivoire	1.6	1.6
Switzerland	17	13	Iceland	0.8	1
Poland	18	10	Denmark	1.2	1
Austria	43	11	Bangladesh	1	0.6
Syria	4	8	United States	0.43	0.50
Uruguay	2	7			

Source: GATS, Moroccan Customs Data