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**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. Under the U.S.-Morocco Free Trade Agreement (FTA), a large number of tariffs for food processing products were phased out.

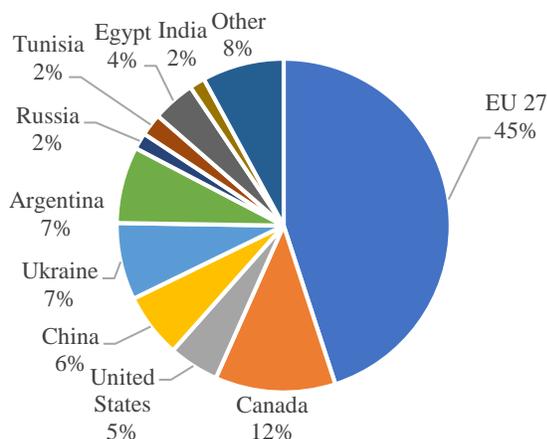
# Market Fact Sheet: Morocco

## Executive Summary

Morocco's food processing industry is comprised of 2,100 registered companies and employs more than 161,671 people. Sales of processed foods generated about \$16 billion in 2022 in Morocco. The U.S.- Morocco Free Trade Agreement provides tariff advantages for many U.S. food products.

## Competition for Imported Food Processing Ingredients in 2022

In 2022, Morocco imported about \$4.9 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, Trade data monitor

## Food Service Industry

The food service industry in Morocco is expected to grow in 2022, despite inflationary pressures. Morocco's food service industry is most developed in Casablanca (commercial center) and Marrakech (tourism).

## Food Retail Industry

In 2021, U.S. exports of retail-related products to Morocco doubled, reaching \$148 million. Morocco imports limited volumes of U.S. pre-packaged chocolates, seafood, sauces, and spirits. A surge in U.S. almond exports is leading growth in consumer-oriented trade. 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 2022

### Imports of Consumer-Oriented Food Products:

\$2.5 billion from the World  
\$ 140 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) 2022:

Food Exports- Agricultural and Related Products total (2021)	\$7.3
Food Imports- Agricultural and Related Products total (2021)	\$10
Food Processing Ingredients Imports total (2021)	\$4.9

### 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 2021:

Population (millions): 36.3  
GDP (billions USD): \$142.9  
GDP per capita (USD): \$3,795

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, large.

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## SECTION I. MARKET SUMMARY

Morocco is home to a well-developed food processing industry with robust demand for imported ingredients. Morocco’s food processing industry is comprised of 2,100 registered companies and employs more than 161,671 people. Approximately 85 percent are small-sized companies with less than 20 employees. Food processing sales are a major focus in the domestic market and generated about \$16 billion in 2022.

**Table 1: Advantages and Challenges Specific to the Food Processing Industry in Morocco**

Advantages	Challenges
<p>Morocco’s relative stability, openness to trade, development, and institutions makes it an attractive destination to do business as well as an attractive hub to reach out across Africa.</p> <p>The Moroccan economy is growing, and as a result, there is a growing demand for processed food products in the domestic market. This will provide new opportunities for U.S. companies to expand their operations and increase their market share in Africa.</p>	<p>Distance vis-à-vis Europe, the Black Sea, and the Middle East hurt U.S. competitiveness.</p> <p>Food safety regulations largely influenced by the European Union, while being irregularly enforced.</p> <p>Adequate cold chain infrastructure exists in country, but linkages between Morocco to other African countries remains underdeveloped. Food processors seeking to reach African markets via Morocco will have to determine if cold chain is sufficient to re-export across Africa.</p>

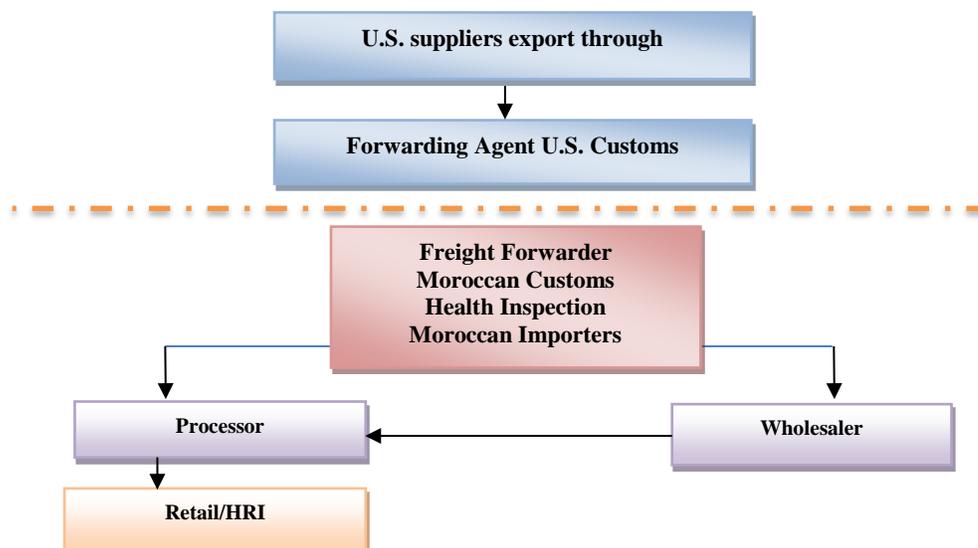
## SECTION II. ROAD MAP FOR MARKET ENTRY

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

Larger Moroccan food processing businesses may import directly, while smaller processors procure ingredients through importers and local wholesalers.

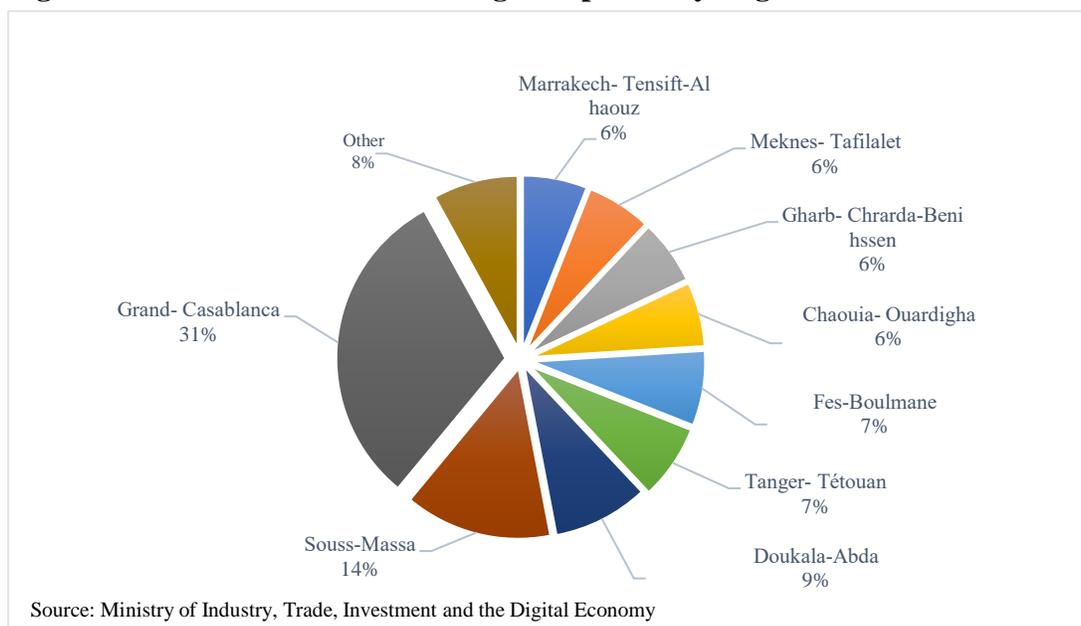
Top food processing sectors in Morocco include dairy, bakery, sugar, chocolate and confectionery, vegetable oil, horticultural processing, red and poultry meat, soft drinks.

**Figure 1: Moroccan Market Structure**



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.

**Figure 2: Moroccan Food Processing Companies by Region**



### Distribution Channels:

Moroccan food processing companies usually buy ingredients direct from foreign suppliers, although smaller processors may purchase from importers or consolidators. Moroccan-produced food products are typically marketed directly to retailers and distributors in wholesale markets. Wholesale markets are located in major cities and offer a wide range of products. Morocco is increasingly building capacity to distribute processed foods at the international level, and can take advantage of existing logistics platforms including trucking lines to Europe and Africa, as well as the TangerMed Port.

### Moroccan 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:

- Food and beverage trade show: [SIAB EXPO MAROC](#),
- Hotel restaurant and institutional trade show: [CREMAI MAROC](#),
- International food hospitality and technologies exhibition: [SIEMA FOODEXPO](#)

## SECTION III. COMPETITION

**Table 2: Competition in the Food Processing Ingredients Sector in Morocco**

Category	HS	Description	Average Imports (2017-2022)			US Duty	Top Foreign Suppliers
			World	USA	%		
Meat & Poultry	0201-0202	Beef, Chilled/Frozen*	\$25,599,512	\$31,162	0.12%	*	EU, Aust
	207	Poultry, Chilled/Frozen*	\$1,674,050	\$213,748	12.77%	*	EU, Braz
Dairy	40210	Non-fat Dry Milk	\$17,543,849	\$3,068,601	17.49%	0%	EU, Ireland
	404	Whey	\$52,733,677	\$6,789,174	12.87%	0%	EU, Arg, Turk
	40510	Butter	\$80,483,150	\$2,575,439	3.20%	0%	EU, Rus, Chin
	406	Cheese	\$108,991,213	\$1,856,928	1.70%	0%	EU, UK, Irel
Eggs	408	Processed Eggs	\$1,105,790	\$14,473	1.31%	0%	EU, Ukra, India
Vegetables	70190	Potatoes, Fresh (not seed)	\$312,218	\$144,285	46.21%	0%	EU, Rus, Egypt
	710	Vegetables, Frozen	\$763,099	\$25,863	3.39%	0%	EU, Peru, Egypt
	712	Vegetables, Dried	\$2,020,783	\$125,409	6.21%	0%	EU, Egypt, India
	713	Legume Veg, Dried Shelled	\$74,666,491	\$3,175,342	4.25%	0%	Canad, Egypt, EU
Fruits & Nuts	080211/12	Almonds*	\$52,398,483	\$50,389,202	96.17%	0%	USA, EU
	080231/32	Walnuts	\$32,191,327	\$9,351,252	29.05%	0%	Chile
	080250/51	Pistachios	\$5,147,574	\$2,802,943	54.45%	0%	Iran
	80290	Other Tree Nuts (Pecans)	\$66,823	\$41,127	61.55%	0%	Tuni, EU, Aust
	80410	Dates	\$161,116,865	\$1,889	0.00%	0%	UAE, Tuni, Alg
	80620	Raisins	\$10,481,380	\$21	0.00%	0%	India, Turk, Iran
Coffee, Tea, Spices	902	Tea	\$214,279,452	\$59,235	0.03%	0%	Chin, EU, Pola
	0904-0910	Spices	\$47,758,438	\$48,712	0.10%	0%	Chin, India, Br
Cereals	1001	Wheat*	\$1,146,145,024	\$32,813,869	2.86%	*	EU, Can, Ukr
	1006	Rice	\$24,088,495	\$2,140,799	8.89%	0%	India, EU, Thai
Milled Products	110630	Flours of Fruit/Tree Nuts	\$1,486,964	\$99,076	6.66%	0%	EU, Phil
	110812	Corn Starch	\$3,051,040	\$585	0.02%	0%	EU, Turk, Egypt
Oilseeds	1201	Soybeans	\$19,789,926	\$18,141,667	91.67%	0%	Urug, Ukra
	120600	Sunflower Seeds	\$7,765,124	\$643,950	8.29%	0%	Argen, EU
Other Plant Products	1302	Vegetable Saps, Extracts; Pectates; Agar-Agar	\$21,867,268	\$136,819	0.63%	0%	EU, India, Chin
Fats & Oils	1502	Fats Of Bovines, Other	\$9,899,161	\$9,882,213	99.83%	0%	EU
	150710	Soybean Oil, Crude	\$442,905,131	\$37,238,939	8.41%	0%	EU, Argen
	150910	Olive Oil, Virgin	\$13,423,412	\$80,860	0.60%	0%	Tuni, EU
	151521	Corn Oil, Crude	\$3,565,406	\$823,230	23.09%	0%	Braz, EU
	151529	Corn Oil, Refined	\$5,553,958	\$375	0.01%	0%	EU
Prep Meat Products	1602	Prep/Pres Meat & Poultry	\$14,374,259	\$66,650	0.46%	0%	EU, Braz, Rus
	1604	Prep/Pres Fishery Products	\$21,859,640	\$75,768	0.35%	0%	EU, UAE
Sweeteners, Confectionary	170211/19	Lactose	\$1,530,012	\$216,746	14.17%	0%	EU, Canad
	170230/40	Glucose	\$4,599,478	\$34,764	0.76%	0%	Turk, EU, Egypt
	170490	Sugar Confection	\$13,071,356	\$69,366	0.53%	0%	EU, Turk, Egypt
Chocolate	1806	Chocolate & Cocoa Prod.	\$67,751,880	\$234,259	0.35%	0%	EU, Egypt, Turk
Prep/Pres Cereals	190120	Mixes & Doughs	\$2,830,688	\$9,739	0.34%	0%	EU, Turk, UAE
	1904	Food Preps of Cereals	\$17,084,012	\$20,813	0.12%	0%	EU, Chin, Egypt
Prep/Pres Fruit, Veg	200190	Prep/Pres Veg/Fr/Nut	\$552,291	\$2,317	0.42%	0%	Chin, EU, Ecua
	200290	Tomato Paste	\$12,091,773	\$0	0.00%	0%	Egypt, EU, Chin
	2005	Prep/Pres Vegetables, Not Frozen	\$17,319,943	\$158,881	0.92%	0%	Chin, EU, Turk
	2008	Prep/Pres Fruits & Nuts	\$13,993,653	\$347,765	2.49%	0%	EU, Egypt, Thai
	200911/19	Orange Juice	\$5,257,660	\$143,156	2.72%	0%	Egypt, Braz, EU
Food Products	2102	Yeasts; Baking Powder	\$9,612,303	\$7,686	0.08%	0%	EU
	2103	Sauces & Condiments	\$35,227,156	\$703,001	2.00%	0%	EU, Chin, Egypt
	210610	Protein Concentrates	\$6,056,308	\$4,571,459	75.48%	0%	EU, Egypt, Turk
	210690	Food Preparations	\$86,119,343	\$2,936,994	3.41%	0%	EU, Egypt, Tuni
Vinegar	220900	Vinegar	\$1,844,104	\$47	0.00%	0%	EU, Chin
Odoriferous Mixtures	3302	Odoriferous Mixtures	\$76,173,647	\$580,402	0.76%	0%	EU, Swit, USA
Proteins	3501	Casein & Caseinates	\$16,754,121	\$100,859	0.60%	0%	EU, India

\*Subject to Tariff Rate Quota (see the [U.S.-Morocco Tariff Schedule for 2023](#))

## **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.
- Rice.
- Prunes, Raisins, Cranberries, Blueberries.
- Specialty wheat products for the baking industry (ex. high or low protein).
- Poultry products and processed eggs.
- Pecans, Hazelnuts.
- Pulses.
- Confectionary.
- Popcorn.

Products not present because they face significant barriers:

- Seed potato varieties for processing, health certificate under negotiation.
- Goat and sheep meat, no market access.
- Natural casing (bovine, ovine, and porcine), 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 feel free to 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**

U.S. Embassy Rabat

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### **National Federation of the Food Processing Industry (FENAGRI)**

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

**Table 3: Top Food Processing Companies, By Sector**

Company Name	End-User Channels	Procurement Channels
<b>Cereals</b>		
<a href="#">A&amp;m Intercommodity</a>	Retail/HRI	Importers/Direct
<a href="#">Casa Grains</a>	Retail/HRI	Importers/Direct
<a href="#">Atlantique Grains S.A</a>	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Graderco</a>	Retail/HRI	Importers/Direct
<a href="#">Gromic</a>	Wholesale /Retail/HRI	Direct
<a href="#">Sté Grains Mabrouka</a>	Retail/HRI	Importers/Direct
<a href="#">Moulins Lahlal</a>	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Fandy Copragri</a>	Retail/HRI	Direct
<a href="#">Souss Cereales</a>	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Multigrain</a>	Wholesale /Retail/HRI	Direct
<a href="#">Grands Moulins</a>	Wholesale /Retail/HRI	Direct
<a href="#">Tria</a>	Wholesale /Retail/HRI	Direct
<a href="#">Minoterie Amgala</a>	Retail/HRI	Direct
<b>Vegetable Oil/Refiners</b>		
<a href="#">Lesieur Cristal</a>	Wholesale /Retail/HRI	Direct
<a href="#">Les Huileries de Souss Bel Hassan Hsb</a>	Wholesale/Retail/HRI	Direct
<a href="#">Les Conserves de Meknes Aicha</a>	Wholesale /Retail/HRI	Direct
<a href="#">Baltimar</a>	Retail/HRI	Importers/Direct
<a href="#">Comaner</a>	Retail/HRI	Importers/Direct
<b>Dairy</b>		
<a href="#">Centrale Laitiere</a>	Retail/HRI	Direct
<a href="#">Copag</a>	Retail/HRI	Importers/Direct
<a href="#">Stockpralim</a>	Retail/HRI	Importers/Direct
<a href="#">Nestle Maroc</a>	Retail/HRI	Importers/Direct
<a href="#">Safilait</a>	Retail/HRI	Importers/Direct
<a href="#">Coprallim</a>	Wholesale/Retail/HRI	Importers/Direct
<a href="#">AFE Distributions</a>	Retail/HRI	Importers/Direct
<a href="#">Comaner</a>	Retail/HRI	Importers/Direct
<a href="#">Fromital</a>	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Fromageries Bel Maroc</a>	Retail/HRI	Importers/Direct
<a href="#">Milk Products Morocco S.A.</a>	Retail/HRI	Importers/Direct
<a href="#">Superfoods - International Trading</a>	Retail/HRI	Importers/Direct
<a href="#">Margafrigue</a>	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Land'or Maroc</a>	Wholesale/Retail/HRI	Importers/Direct
<b>Dried Fruits and Nuts</b>		
<a href="#">Morocco Peanuts</a>	Wholesale/Retail/HRI	Direct
<a href="#">Comptoir Food</a>	Wholesale/Retail/HRI	Direct
<a href="#">Eurodis</a>	Retail/HRI	Importers/Direct
<a href="#">Fruit Orty</a>	Retail/HRI	Importers/Direct
<a href="#">City Trade International</a>	Retail/HRI	Local products/ Imports
<a href="#">Etablissement Bicha</a>	Retail/HRI	Local products/ Imports
<a href="#">Frigo Baraka Sarl</a>	Retail/HRI	Importers/Direct

<a href="#">Fruideli</a>	Wholesale/Retail/HRI	Direct
<a href="#">Mix Food</a>	Retail/HRI	Direct
<a href="#">Trapico</a>	Retail/HRI	Importers/Direct

<b>Chocolate &amp; Cocoa</b>		
<a href="#">Foods and Goods S.A.</a>	Retail	Importers/Direct
<a href="#">Copralim Maroc</a>	Retail	Importers/Direct
<a href="#">Bimo Maroc</a>	Retail	Importers/Direct
<a href="#">Jessy Diffusion</a>	Wholesale /Retail	Importers/Direct
<a href="#">Biscoma</a>	Retail	Importers/Direct
<a href="#">Best Biscuits</a>	Retail	Importers/Direct

<b>Poultry and Beef</b>		
<a href="#">Koutubai SA</a>	Retail/HRI	Direct
<a href="#">Maroc Dawajine</a>	Retail/HRI	Direct
<a href="#">Engraissement Doukkala</a>	Retail/HRI	Direct
<a href="#">Alf Sahel</a>	Wholesale/Retail	Direct
<a href="#">Zalagh Holding</a>	Wholesale /Retail	Direct
<a href="#">Dindy</a>	Retail/HRI	Importers/Direct
<a href="#">King Generation</a>	HRI	Importers/Direct
<a href="#">La FONDA</a>	Retail/HRI	Importers/Direct

*Source: Industry websites, press*

**Attachments:**

No Attachments