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## Morocco

### Food Processing Ingredients

2017

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**Report Highlights:**

Morocco, a U.S. Free Trade Agreement partner, has been an occasionally good yet price-sensitive market for U.S. food processing ingredients. Best prospects include wheat; fats and oils; dairy products; dried fruit and tree nuts; pulses; confectionary; rice; and popcorn. Beef, poultry, and processed eggs have strong potential if market access barriers are removed.

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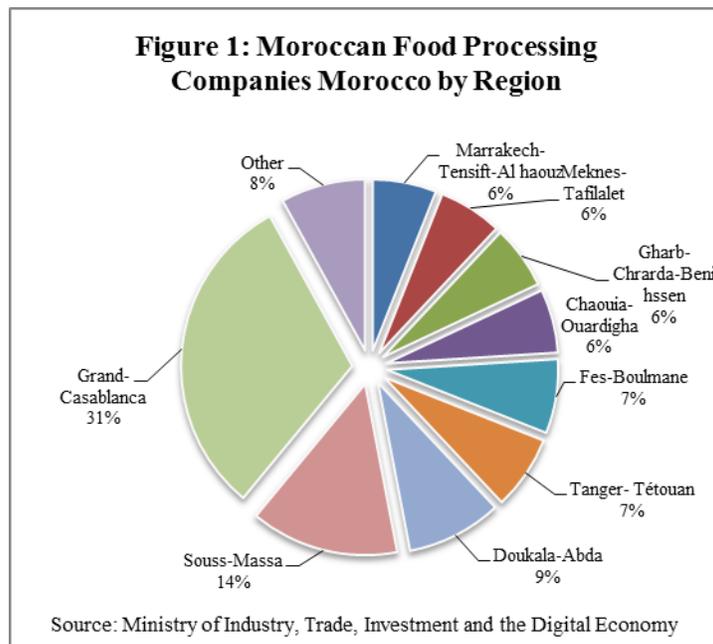
## SECTION I. MARKET SUMMARY

Morocco’s food processing industry was valued at \$16.2 billion in 2016 (≈16% of Morocco’s GDP)<sup>1</sup>. Sales are divided approximately 70% to retail and 30% to food service.

Table 1: Advantages and Challenges Specific to the Food Processing Ingredients Sector

Advantages	Challenges
<p>As the regional leader in terms of market openness and efficiencies, Morocco has and is actively pursuing increased commercial opportunities in Africa. Considering Morocco’s relatively low barriers to trade when compared to regional neighbors, Morocco is positioning itself to be a competitive platform in the global supply chain for value-added food processing, where its food import demand could eventually exceed its own domestic needs.</p>	<p>The United States needs to overcome its logistical disadvantage that results in Morocco sourcing from Europe and the Middle East. Meanwhile, Morocco needs to overcome political hurdles of its own in order to expand export opportunities to Africa.</p>
<p>Continued expansion of modern distribution channels to retail/food service providers, creating an ever-larger market for Moroccan processed food products. <i>Note: See FAS/Morocco’s Retail and HRI <a href="#">GAIN</a> reports</i></p>	<p>Food safety controls and protections will not be strictly enforced on the internal market as long as unemployment remains a higher priority.</p>

Opportunities for U.S. food ingredients exist primarily in/near Casablanca, Morocco’s commercial where most food processors are located [Note: See Annex for a list *Morocco’s Major Food Processing Companies by Sector*]. To date, U.S. wheat, tree nuts, and fats and oils have the most successful food ingredients.



hub,  
been

<sup>1</sup> Source: National Federation of Food Processing Industry (FENAGRI), [https://www.fenagri.org/index.php?option=com\\_content&view=article&id=1788&Itemid=151](https://www.fenagri.org/index.php?option=com_content&view=article&id=1788&Itemid=151)

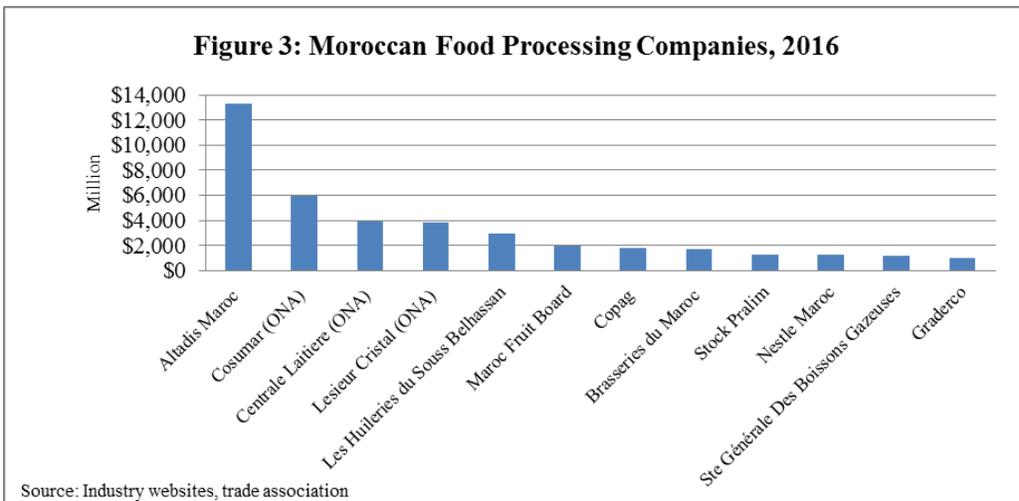
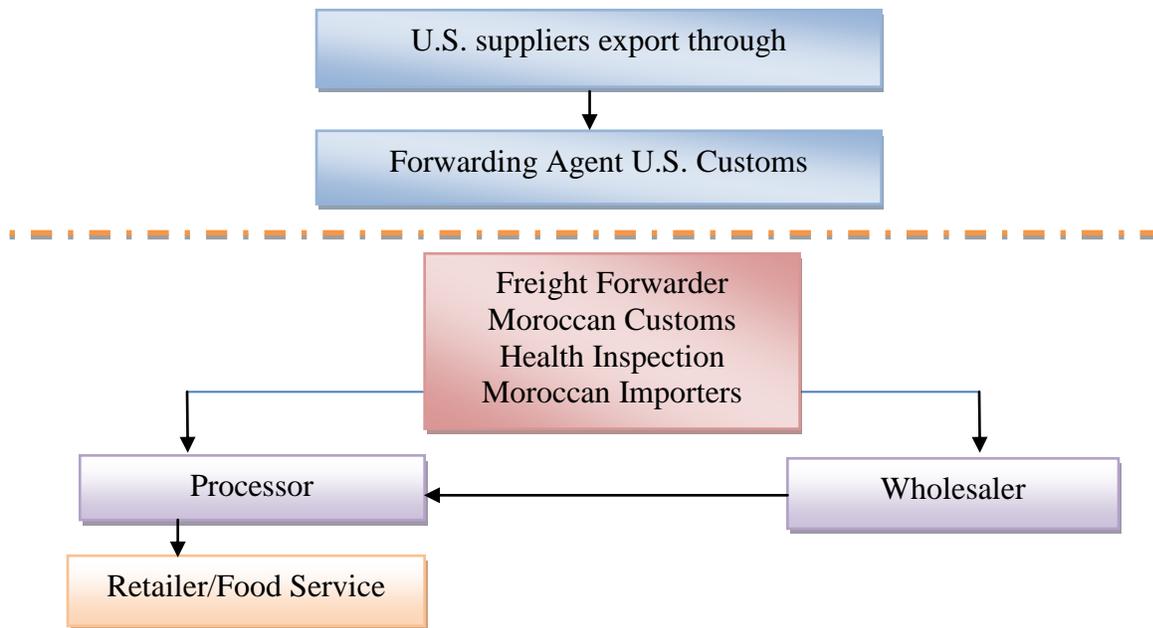
## SECTION II. ROAD MAP FOR MARKET ENTRY

Some large Moroccan food processors have direct relationships with foreign suppliers while most procure ingredients through brokers and local wholesalers.

- Large food processing companies prefer to source their food ingredients or products directly from foreign suppliers to obtain better pricing and quality control.
- Small and medium-sized Moroccan food processors prefer to purchase from local agents to obtain better service from the local agent who buys large quantities from overseas, and as the smaller food processors require smaller quantities, local suppliers make it more convenient for processors to deal with quality issues.

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

Figure 2: Market Structure



## SECTION III. COMPETITION

U.S. food ingredients face a competitive environment in Morocco, especially from Europe, Egypt, the United Arab Emirates, and Turkey.

Table 2: Competitive Situation Facing U.S. Suppliers

<b>Product Category</b> <i>(Imports in Thousand MT; Million US\$)</i>	<b>Major Supply Sources in 2016</b> <b>(in value)</b>	<b>Strengths of Key Supply Countries</b>	<b>Advantages and Disadvantages of Local Suppliers</b>
<b>Cheese</b> <i>Volume: 17.3</i> <i>Value: \$63.4</i>	1. Netherlands – 19% 2. France – 16% 3. Germany – 15% 4. New Zealand – 13% 5. Ireland – 7%	- Price - Supply Chain - Familiarity with Cheese Types	- Local production limited but growing in volume and diversity. - Morocco is a processed cheese market.
<b>Other Dairy Product (Excl. Cheese)</b> <i>Volume: 52.4</i> <i>Value: \$142</i>	1. New Zealand – 22% 2. Netherlands – 20% 3. France – 15% 4. Ireland – 9% 5. Germany – 6%	- Price - Supply Chain	- Local production limited but growing in volume and diversity
<b>Tree Nuts</b> <i>Volume: 5.5</i> <i>Value: \$15.3</i>	<b>1. USA – 49%</b> 2. Chile – 17% 3. Cote d’Ivoire – 10% 4. Benin – 9% 5. Spain – 3%	- Duty-free, quota free access for US almonds in 2021	- Limited but growing production - Significant competition from informal trade channels via Spanish enclaves which do not pay VAT.
<b>Vegetables Oils Exc. Soy Oil</b> <i>Volume: 163</i> <i>Value: \$169</i>	1. Spain – 22% 2. Malaysia – 16% 3. Indonesia – 9% 4. UAE – 6	- Price	- Virtually no local production

Source: Global Trade Atlas, FAS/Rabat

## **SECTION IV: BEST PRODUCT PROSPECTS**

### **Products present in the market that have good sales potential:**

- Wheat
- 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
- Pecans, Hazelnuts
- Pulses
- Confectionary
- Rice
- Popcorn

### **Products not present because they face significant barriers:**

- Beef – no market access
- Poultry – no market access
- Processed Eggs – no market access

## SECTION V. POST CONTACT AND FURTHER INFORMATION

### **Agricultural Affairs Office**

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## Annex

Table 3: Morocco's Major Food Processing Companies by Sector, 2016

Company Name	Sales 2016 (\$ Mill)	End-User Channels	Procurement Channels
<b>Cereals</b>			
A&m Intercommodity	N/A	Retail/HRI	Importers/Direct
<a href="#">Casa Grains</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Copragri S.A.</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Glencore-Grain Maroc S.A.R.l</a>	N/A	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Atlantique Grains S.A</a>	N/A	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Gromic</a>	N/A	Wholesale /Retail/HRI	Direct
<a href="#">Sté Grains Mabrouka</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Saiss Cereales</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Moulins Lahlal</a>	N/A	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Fandy Copragri</a>	N/A	Retail/HRI	Direct
<a href="#">Souss Cereales</a>	N/A	Wholesale /Retail/HRI	Importers/Direct
<a href="#">Multigrain</a>	N/A	Wholesale /Retail/HRI	Direct
<a href="#">Grands Moulins</a>	N/A	Wholesale /Retail/HRI	Direct
<a href="#">Tria</a>	N/A	Wholesale /Retail/HRI	Direct
<a href="#">Minoterie Amgala</a>	N/A	Retail/HRI	Direct

<b>Vegetable Oil/Refiners</b>			
<a href="#">Lesieur Cristal</a>	\$382	Wholesale /Retail/HRI	Direct
<a href="#">Les Huileries de Souss Bel Hassan Hsb</a>	\$370	Wholesale/Retail/HRI	Direct
<a href="#">Les Conserves de Meknes Aicha</a>	\$52	Wholesale /Retail/HRI	Direct
<a href="#">Baltimar</a>	\$6.1	Retail/HRI	Importers/Direct
<a href="#">Comaner</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Conserverie du Maroc Oriental</a>	N/A	Retail/HRI	Importers/Direct

<b>Dairy</b>			
<a href="#">Centrale Laitiere</a>	\$388.7	Retail/HRI	Direct
<a href="#">Copag</a>	\$177.1	Retail/HRI	Importers/Direct
<a href="#">Stockpralim</a>	\$129.3	Retail/HRI	Importers/Direct
<a href="#">Nestle Maroc</a>	\$123.1	Retail/HRI	Importers/Direct
<a href="#">Safilait</a>	\$88	Retail/HRI	Importers/Direct
<a href="#">Copragri S.A.</a>	\$82.1	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Coprallim</a>	\$38.1	Wholesale/Retail/HRI	Importers/Direct
<a href="#">AFE Distributions</a>	\$28.3	Retail/HRI	Importers/Direct
<a href="#">Comaner Maroc</a>	\$24.4	Retail/HRI	Importers/Direct
<a href="#">Fromital</a>	\$6	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Fromageries Bel Maroc</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Milk Products Morocco S.A.</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Superfoods - International Trading</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Margafrique</a>	N/A	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Land'or Maroc</a>	N/A	Wholesale/Retail/HRI	Importers/Direct

<b>Dried Fruits and Nuts</b>			
<a href="#">Morocco Peanuts</a>	\$7.2	Wholesale/Retail/HRI	Direct
<a href="#">Comptoir Food</a>	\$1-5	Wholesale/Retail/HRI	Direct
<a href="#">Maroc Delice</a>	\$1-5	Wholesale/Retail/HRI	Importers/Direct
<a href="#">Eurodis</a>	\$1-5	Retail/HRI	Importers/Direct
<a href="#">Fruit Orty</a>	\$1-5	Retail/HRI	Importers/Direct
<a href="#">City Trade International</a>	N/A	Retail/HRI	Local products/ Imports
<a href="#">Etablissement Bicha</a>	N/A	Retail/HRI	Local products/ Imports
<a href="#">Frigo Baraka Sarl</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Fruideli</a>	N/A	Wholesale/Retail/HRI	Direct
<a href="#">Mix Food</a>	N/A	Retail/HRI	Direct
<a href="#">Pistacherie Rayane SARL</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Raji Freres</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Ratra</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Sactal</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Trapico</a>	N/A	Retail/HRI	Importers/Direct

<b>Prepared Fruits &amp; Vegetables</b>			
<a href="#">Ste Ouest Marocain</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Les Fruits Dores</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Frudor Fruits Et Primeurs</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Atlantic-Gulf Company</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Mabex S.A</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Arbor- Frigos Tarik</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Frigorifique Al-Fadiliya</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Kantari (GROUPE)</a>	N/A	Retail/HRI	Importers/Direct
<a href="#">Groupe Jamai Domaines Agricoles</a>	N/A	Retail/HRI	Importers/Direct

<b>Chocolate &amp; Cocoa</b>			
<a href="#">Foods and Goods S.A.</a>	\$52	Retail	Importers/Direct
<a href="#">Coprallim Maroc</a>	\$38	Retail	Importers/Direct
<a href="#">Bimo Maroc</a>	N/A	Retail	Importers/Direct
<a href="#">Jessy Diffusion</a>	N/A	Wholesale /Retail	Importers/Direct
<a href="#">Biscoma</a>	N/A	Retail	Importers/Direct
<a href="#">Best Biscuits</a>	N/A	Retail	Importers/Direct

Source: Industry websites, press