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Morocco

Food Processing Ingredients

U.S. Beef and Poultry Gain New Market Access in Morocco

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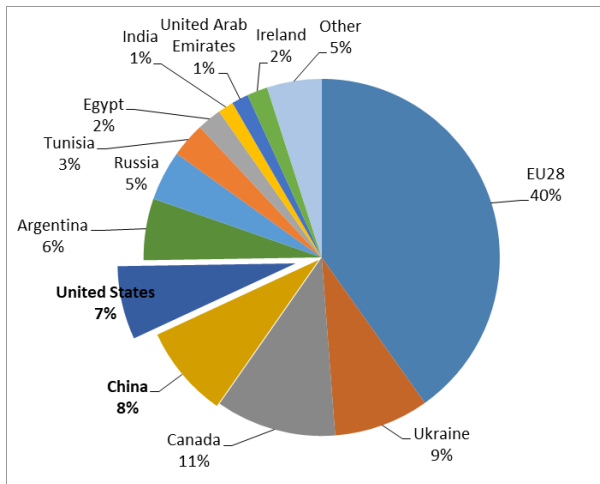
Report Highlights:

In 2018, the United States and Morocco negotiated terms for U.S. poultry and beef market access, which could be an opportunity for U.S. exporters to target the food-processing sector. Best prospects include wheat; fats and oils; prepared dairy products; poultry; beef; vegetables; food preparations; tree nuts; oilseeds; sweeteners and confectionary; chocolate; beer and alcoholic beverages.

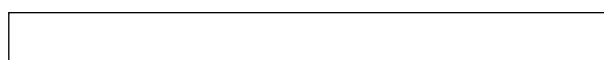
Executive Summary

In 2018, the United States and Morocco negotiated terms for U.S. poultry and beef market access, which could be an opportunity for U.S. exporters to target the food-processing sector. Best prospects include wheat; fats and oils; prepared dairy products; poultry; beef; vegetables; food preparations; tree nuts; oilseeds; sweeteners and confectionary; chocolate; beer and alcoholic beverages

The European Union is Morocco's primary trading partner, and the source for about 40 percent of Morocco's food ingredients imports.



Sources: Global Trade Atlas, Office des Changes



Strengths	Weaknesses
Morocco is one of the fastest growing economies in North Africa	Distance and lack of shipping lines
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

Quick Facts CY 2018

Food Processing Ingredient Imports: \$2.8 billion

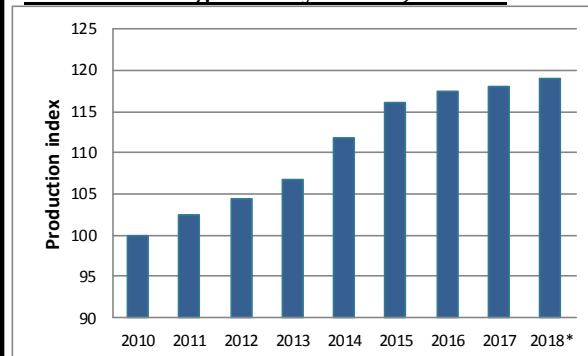
Top 10 Best Products

- Wheat
- Fats & Oils
- Dairy
- Vegetables
- Food Preparations
- Beef and Poultry
- Oilseeds
- Sweeteners & Confectionary
- Chocolate
- Beer and alcoholic beverages

Food Processing Industry Facts 2018

Food Processing Industry	\$19.4 billion
Food Imports	\$5.7 billion
No. of Employees	143,356
No. of Food Processors	2,076
% of total GDP	16%

Food Processing Industry Trends, 2010-18



Source: Haut Commissariat au Plan

Top 10 Food Processing Ingredients: See Annex.

GDP/Population (2018)

Population (millions): 35.7
 GDP (billions USD): \$121.4
 GDP per capita (USD): \$3,196

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 Sector

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. According to the latest World Bank annual ratings, Morocco is ranked 60 among 190 economies in the ease of doing business.	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.

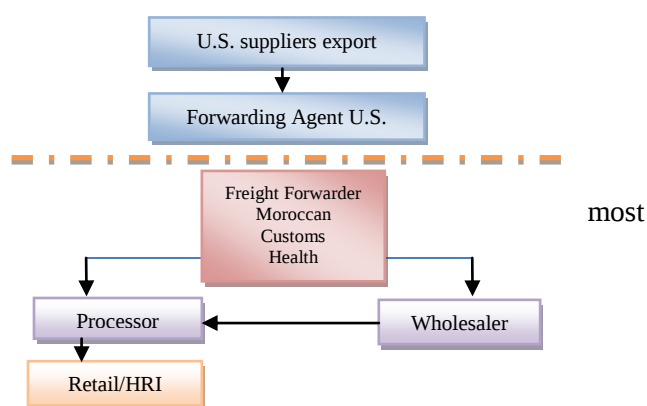
In 2018, Morocco's food processing industry was valued at \$19.4 billion ($\approx 16\%$ of Morocco's GDP)¹. Sales are divided approximately 70% to retail and 30% to food service.

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, where 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.



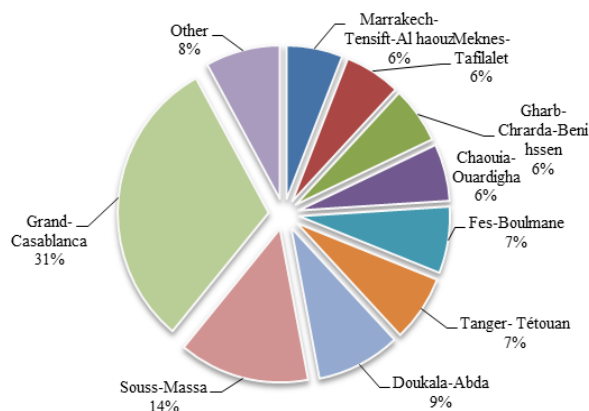
Trade Shows

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:

- [Morocco FoodExpo](#) (Nov. 06-08, 2019)
- [Cremat Maroc](#) (March 19-22, 2019)

Figure 1: Moroccan Food Processing Companies Morocco by Region



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

¹ Source: National Federation of Food Processing Industry (FENAGRI),

Section III: Competition

Category	HS	Description	Avg Imports, 2016-18			US Duty %	Top Foreign Suppliers
			World	USA	%		
Meat & Poultry	0201-0202	Beef, Chilled/Frozen*	\$32,124,525	\$0	0.0%	*	EU, Aust
	0207	Poultry, Chilled/Frozen*	\$826,460	\$0	0.0%	*	EU, Tuni, Braz
Dairy	040210	Non-fat Dry Milk	\$11,150,896	\$1,738,189	15.6%	7.2%	EU, Canad
	0404	Whey Protein	\$45,483,336	\$5,933,084	13.0%	0%	EU, Argen, Turk
	040510	Butter	\$90,628,850	\$2,337,564	2.6%	0%	EU, Rus, Chin
	0406	Cheese	\$87,274,586	\$1,908,430	2.2%	0%	EU, Tuni, Egyt
Eggs	0408	Processed Eggs	\$1,354,336	\$9,648	0.7%	3.3%	EU, Ukra, India
Vegetables	070190	Potatoes, Fresh (not seed)	\$325,492	\$91,871	28.2%	0%	EU, Rus, Egyt
	0710	Vegetables, Frozen	\$680,671	\$25,784	3.8%	0%	EU, Peru, Egyt
	0712	Vegetables, Dried	\$1,504,659	\$74,994	5.0%	0%	EU, Egyt, India
	0713	Legum Veg, Dried Shelled	\$67,898,033	\$2,025,055	3.0%	0%	Canad, Egyt, EU
Fruits & Nuts	080211-080212	Almonds*	\$6,762,718	\$5,233,343	77.4%	*	Chile, EU, Chin
	080231-080232	Walnuts	\$19,203,992	\$9,108,916	47.4%	0%	Chile
	080250-080251	Pistachios	\$1,724,498	\$1,239,841	71.9%	0%	Iran
	080290	Other Tree Nuts (Pecans)	\$42,897	\$5,037	11.7%	0%	Tuni, EU, Aust
	080410	Dates	\$126,783,565	\$1,232	0.0%	0%	Tuni, Egyt, UAE
	080620	Raisins	\$3,188,157	\$0	0.0%	0%	India, Turk, Iran
Coffee, Tea, Spices	0902	Tea	\$211,646,968	\$28,201	0.0%	0%	Chin, India, Indo
	0904-0910	Spices	\$54,942,010	\$96,819	0.2%	0%	Chin, India, Braz
Cereals	1001	Wheat*	\$1,034,728,395	\$87,637,265	8.5%		EU, Rus, Ukr
	1006	Rice	\$11,290,796	\$1,354,478	12.0%	0%	India, EU, Thai
Milled Products	110630	Flours of Fruit/Tree Nuts	\$905,049	\$47,179	5.2%	0%	EU, Phili
	110812	Corn Starch	\$1,614,097	\$778	0.0%	0%	EU, Turk, Egyt
Oilseeds	1201	Soybeans	\$25,999,464	\$21,665,630	83.3%	0%	Urug, Ukra
	120600	Sunflower Seeds	\$4,860,354	\$988,000	20.3%	0%	Argen, EU
Other Plant Products	1302	Vegetable Saps, Extracts; Pectates; Agar-Agar	\$19,021,149	\$54,769	0.3%	0%	EU, India, Chin
Fats & Oils	1502	Fats Of Bovines, Sheep/Goats Other Than Head 1503	\$7,930,741	\$7,564,710	95.4%	0%	EU
	150710	Soybean Oil, Crude	\$383,324,570	\$15,749,971	4.1%	0%	EU, Argen, Rus
	150910	Olive Oil, Virgin	\$19,960,867	\$144,863	0.7%	0%	Tuni, EU
	151521	Corn Oil, Crude	\$1,786,643	\$0	0.0%	0%	Braz, EU

	151529	Corn Oil, Refined	\$14,704,655	\$47	0.0%	0%	EU
Prep Meat Products	1602	Prep/Pres Meat & Poultry Prods	\$10,456,383	\$0	0.0%	3.3 %	EU, Braz, Rus
	1604	Prep/Pres Fishery Products	\$11,930,717	\$127,875	1.1%	0%	Seneg, EU, UAE
Sweeteners, Confectionary	170211-170219	Lactose	\$1,222,288	\$249,664	20.4 %	0%	EU, Canad
	170230-170240	Glucose	\$3,557,318	\$27,635	0.8%	0%	Turk, EU, Egypt
	170490	Sugar Confection	\$8,584,710	\$64,613	0.8%	22 %	EU, Turk, Egypt
Chocolate	1806	Chocolate & Cocoa Products	\$46,935,079	\$179,452	0.4%	22 %	UAE, EU, Turk
Prep/Pres Cereals	190120	Mixes & Doughs	\$2,317,563	\$14,028	0.6%	22 %	EU, Turk, UAE
	1904	Food Preps of Cereals	\$14,106,296	\$17,249	0.1%	0%	EU, Chin, Egypt
Prep/Pres Fruit, Veg	200190	Prep/Pres Veg/Fr/Nut by Vinegar	\$697,376	\$23,491	3.4%	0%	Chin, EU, Ecua
	200290	Tomato Paste	\$10,113,833	\$0	0.0%	0%	Egypt, EU, Chin
	2005	Prep/Pres Vegetables, Not Frozen	\$14,378,317	\$203,400	1.4%	0%	Chin, EU, Turk
	2008	Prep/Pres Fruits & Nuts	\$11,248,050	\$510,976	4.5%	0%	EU, Egypt, Thai
	200911-200919	Orange Juice	\$6,351,523	\$92,942	1.5%	0%	Egypt, Braz, EU
Food Products	2102	Yeasts; Baking Powder	\$7,441,194	\$2,552	0.0%	0%	EU
	2103	Sauces & Condiments	\$19,169,238	\$686,725	3.6%	0%	EU, Chin, Egypt
	210610	Protein Concentrates	\$4,732,554	\$3,308,357	69.9 %	0%	EU, Egypt, Turk
	210690	Food Preparations	\$67,123,254	\$2,913,043	4.3%	0%	EU, Egypt, Turk
Vinegar	220900	Vinegar	\$1,657,452	\$7,463	0.5%	0%	EU, Chin
Odoriferous Mixtures	3302	Odoriferous Mixtures	\$74,008,444	\$406,739	0.5%	0%	EU, Egypt, Aust
Proteins	3501	Casein & Caseinates	\$11,153,232	\$33,615	0.3%	0%	EU, India

*Subject to Tariff Rate Quota (see the [U.S.-Morocco Tariff Schedule for 2019](#))

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
- Poultry and beef meat

Products not present because they face significant barriers:

- Processed Eggs – no health certificate
- Potatoes – no health certificate

Section V: Post Contact and Further Information

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
Margafrigue	\$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
Frigorifique 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

Post:

Rabat

