

**Required Report:** Required - Public Distribution

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**Report Name:** Retail Foods

**Country:** Morocco

**Post:** Rabat

**Report Category:** Retail Foods

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**Report Highlights:**

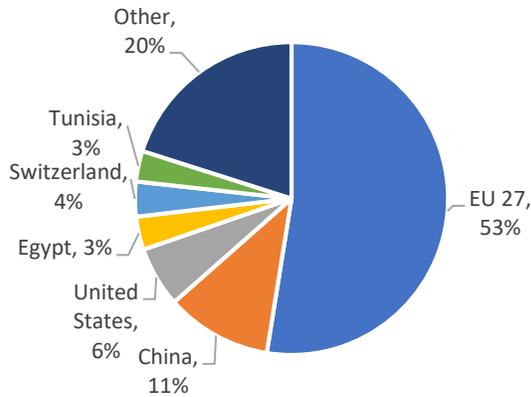
Morocco is a price-sensitive market that does not showcase significant quantities of U.S. food and beverages in the retail sector. In 2022, U.S. exports of consumer-oriented products to Morocco reached \$155 million. Post has identified limited volumes of U.S. seafood, chocolates, sauces, and spirits available on select Moroccan retail shelves. Best prospects include almonds, pistachios, protein concentrates, food preparations, cheese, rice, seafood, beer, spirits and liqueurs, sauces, and condiments. The U.S.-Morocco Free Trade Agreement is the only American free trade agreement on the African continent.

# Market Fact Sheet: Morocco

Morocco, a U.S. Free Trade Agreement partner, is a price-sensitive market that does not showcase significant quantities of U.S. food and beverages in the retail sector. In 2022, U.S. exports of retail-related products to Morocco reached \$138 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 retail-oriented trade.

## Imports of Consumer-Oriented Products (2020-2022 Average Imports)

In 2022, U.S. exports of consumer-oriented products to Morocco amounted to \$155 million, representing a 6 percent decline from the previous year's total \$166 million. This decrease was a result of inflation and rising shipping expenses. The United States continues to encounter intense competition from the European Union.



Sources : Office des Changes, TDM

## Food Service Industry

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

## Food Processing

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.

## Quick Facts CY 2022

### Imports of Consumer-Oriented Food Products:

- \$2.7 billion from the World
- \$170 million from the United States

### Top 10 Best Products:

- Tree Nuts
- Chocolate
- Dairy Products
- Food Preparations
- Beer, Spirits and Liqueurs
- Sweeteners & Confectionary
- Seafood
- Rice
- Sauces and Condiments

### Food Trade (U.S. billion):

Food Exports- Agricultural and Related Products total (2022)	\$8
Food Imports- Agricultural and Related Products total (2022)	\$10.8
Retail Food Imports (2022)	\$1.9

### 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)

### Top 6 QSR Chains in Morocco:

- [McDonalds](#)
- [Pizza Hut](#)
- [Domino's Pizza](#)
- [KFC](#)
- [Burger King](#)
- [Pomme de Pain](#)

### GDP/Population 2022:

Population (millions): 36.3  
 GDP (billions USD): \$124  
 GDP per capita (USD): \$3,421

Sources: World Bank, Morocco Office des Changes, Morocco

## Moroccan Market Advantages and Disadvantages

Strengths	Weaknesses
US-Morocco FTA provides market access and opportunities to use Morocco as a platform to reach African market.	Distance and lack of shipping lines. Freight disadvantage.
Opportunities	Challenges
Morocco is one of the fastest growing economies in North Africa.	Erosion of U.S. preferences vis-à-vis Morocco's FTAs with the EU, Arab League.

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## SECTION 1. MARKET SUMMARY

According to the World Bank's latest report, Morocco's real GDP growth has declined from 7.9 percent in 2021 to an estimated 1.2 percent in 2022. The Ukraine war and global supply chain disruptions contributed to a surge in prices, with Moroccan annual inflation peaking at 8.3 percent in late 2022. As results, consumers cut back spending on some optional retail products, leading to a slower economic recovery. The Casablanca-Rabat corridor continues to account for about 50 percent of all modern retailers. Marjane Holding (Marjane and Marjane Market) and Label'Vie (Carrefour, Carrefour Market, and Atacadao) are Morocco's leading modern food retailers with other notables including Ynna Holdings (Aswak Salam) and the Turkish small format discounter BIM.

### *Recent Trends & Upcoming Events in Retail*

- ✓ [Marjane](#) and [Carrefour](#) continue to invest in new outlets across the country. The increase of shopping malls in larger cities is contributing to the growth of hypermarkets in the country.
- ✓ In October 2022, the Moroccan Ministry of Industry and Trade signed an agreement with Turkish discount retailer BIM, aiming to source 85% of its products locally by 2025, while the remaining 15% will be imported from Turkey. Products will be produced by local manufacturers and sold under the BIM brand, bearing the "Made in Morocco" label.
- ✓ In 2022, Marjane Group [inaugurated](#) two new generation hypermarkets, Marjane California and Bouskoura, offering a new customer experience. The group has implemented a value-added stands strategy to showcase different products selections, such as bakery, fish, butcher, dairy, fruit and vegetables, cosmetics, and textiles. The group also partnered with different brands like [Jeff de Bruges](#), [Maison Alexis](#), Be Wok, Okfe café, [Mamie Pâtes](#), Tiffee, and [Decathlon](#).
- ✓ Morocco's retail distribution leader, Marjane Holding, leads hypermarkets in Morocco with a 45.4 percent value share in 2022, followed by Label'Vie groupe 29.6 percent.
- ✓ The Group Marjane introduced "[Filière Exclusive M](#)" to provide fresh, healthy, and high-quality food items while supporting local sourcing and short supply chains. These products can be found exclusively at Marjane Market, and on the [Marjan online platform](#).
- ✓ Peak sales occur during Ramadan, which will take place on or about March 10 – April 8, 2024.
- ✓ The growth of internet and smartphone usage in Morocco has led to an increase in online shopping, offering retailers opportunities to expand their reach through e-commerce platforms.
- ✓ Food retail sector is a small but growing opportunity for U.S. exporters to take advantage of the U.S.-Morocco Free Trade Agreement ([FTA](#)).
- ✓ The 4<sup>th</sup> International Exhibition of Food & Drinks "[SIAB EXPO MAROC](#)" is scheduled to take place from November 22-25, 2023 in Casablanca. Note this event has not been held since the COVID pandemic and Post has not been able to confirm the quality of the show since 2019.

The Ministry of Industry estimates traditional channels account for 80 percent of grocery retailing. Industry sources anticipate modern, large-scale distribution will support 30 percent of national consumption by 2025. This estimate is supported by changing demographics, urbanization, and the evolution of the consumers' purchasing behaviors, which should create additional opportunities for imported food products.

**Table 1: Moroccan Retail: Advantages and Challenges**

Advantages	Challenges
Growing perception that supermarkets offer safer and cheaper products.	Supply chain: (1) Retailers have leveraged past and present foreign investment into Moroccan retail by U.S. competitors (Europe, Turkey) and (2) U.S. multi-national food companies have regional production.
The supermarket sector continues growing.	Market size: 35 million Moroccans, 10-15 percent of which can afford to buy imported products.
Increased acceptance of packaged food.	Entry fees for new products.

**Hypermarkets** are typically not within walking distances of residential areas and feature parking for up to 1,000 cars. They stock over 17,000 SKU in food items which account for 40-50 percent of total sales. As a result, retailers aggressively promote their products.

- [Marjane](#) is especially aggressive in advertising.
- [Atacadao](#) positions itself between a hypermarket and a discounter, targeting lower-income consumers, professionals, and small retailers, including through offering bulk purchase discounts.
- [Aswak Assalam](#) has reduced its number of stores.

**Table 2: List of Hypermarkets Chains in Morocco**

Retailer Name	Ownership	Est. Turnover, \$Mill, 2022	Est. # of Outlets, 2022	Locations	Purchasing Agent type
	Moroccan: SNI Group	\$1,400	Marjane: 38  Marjane market: 52	Casablanca, Rabat, Sale, Marrakech, Meknes, Taza, Tanger, Agadir, Kenitra, Mohamedia, Safi, Tetouan, Oujda, Saidia, Nador, Fes, Khouribga, Beni Mellal, Kelaat Es-Sraghna, Saleh, Al Hoceima, Fkih Ben	Imports direct and buys from importers
	Moroccan: Label'Vie	\$300-\$350	12	Casablanca, Meknes, Fes, Marrakech, Mohammedia Rabat, Agadir, Oujda, Tanger	Imports direct via Label'Vie and buys from importers
	95% French: Carrefour-5%	\$66-\$90	12	Casablanca, Fes, Rabat, Marrakech, Sale, Meknes, Tanger	
	Moroccan: Ynna Holding	\$150-\$200	14	Rabat, Marrakech, Agadir, Tanger, Casablanca Mohammedia, Kenitra, Emara, Oujda, Essaouira	Imports direct and buys from importers

Source: Industry websites

**Supermarkets, Discounters, and Convenience Stores** are located in or within walking distance of medium to high-income neighborhoods and compete for urban consumers with traditional mom-and-pop shops and open-air markets. They are much smaller than hypermarkets but have a minimum of 20,000 ft<sup>2</sup>, 3 to 6 registers, and feature limited parking space.

- ACIMA stocks at least 5,000 items

- Carrefour Market stocks around 10,000 products, including 4,000-5,000 food items. Carrefour carries specialty products like pork and alcohol.
- Discount food outlets such as [BIM](#), which opened in 2009, have grown in popularity, followed by relative new-comer [Costcutter](#). [Label'Vie](#) addresses the deep-discount market segment through its Atacadao stores – see above.
- Morocco has only independent convenience stores.

**Table 3: List of Supermarkets Chains in Morocco**

<b>Retailer Name</b>	<b>Ownership</b>	<b>Est. Turnover, \$Mill, 2022</b>	<b>Est. # of Outlets, 2022</b>	<b>Locations</b>	<b>Purchasing Agent type</b>
	<b>Moroccan:</b> SNI Group	\$50-\$100	52	Casablanca, Rabat, Tanger, Marrakech, Fes, Safi, Khouribga, Beni Mellal, Temara, El Jadida, Berrechid	Imports direct via Marjane and buys from importers
	<b>Moroccan:</b> Label'Vie-95% <b>French:</b> Carrefour-5%	\$500-\$600	<b>87</b>	Casablanca, Mohamedia, Rabat, Meknes, Kenitra, Marrakech, Fes, Agadir, Sale, Khemissat, Settat, El Jadida, Temara, Safi	Imports direct via Label'Vie and buys from importers
	<b>Turkish:</b> Groupe Birlesik Magazal A.S	\$20-\$50	604	Casablanca, Rabat, Sale	Import direct
	<b>British</b>	N/A	1	Marrakech	n/a
	<b>French</b>	N/A	2	Casablanca, Rabat	Imports direct
Other Small Supermarkets (≥ 3 registers, >25000 ft <sup>2</sup> )	Local – private	\$50-100	37	Casablanca, Rabat, Agadir	Buys from importers
Other Large Grocery Stores (Self-service, ≥ 1 register, < 2000 ft <sup>2</sup> )	Local -private	\$100-150	285	Casablanca, Marrakech, Rabat, Agadir	Buys from importers

Source: Industry website

**Gas-marts** are 500 to 3,300 ft<sup>2</sup>, typically feature one electronic register, and typically supply convenience foods. They are often located along highway rest stops connecting Morocco's major cities. Stores are usually expensive and carry some imported convenience items, like snack foods, beverages, and confectionary.

**Table 4: Major Gas-marts in Morocco**

Retailer Name	Est. # of Outlets 2022*	Location	Purchasing Agent
Afriquia Mini-Brahim (Managed by <a href="#">Maroshop</a> ) 	43	Casablanca, Marrakech, Agadir, Meknes, Fes, Settat	Buys from Importers
Shell Gas Stations ( <a href="#">Select Shop</a> )	27	Casablanca, Rabat, Marrakech	Buys from Importers
TotalEnergies Marketing Maroc ( <a href="#">Service</a> )	NA	Casablanca, Rabat, Marrakech	Buys from Importers
Mobile Gas Stations on the Run developed by Exxon	16	Casablanca, Rabat, Marrakech	Buys from Importers

Source: Industry Websites, \*No official data is available from the Moroccan Ministry of Commerce and Industry

### Traditional Markets - "Mom & Pop" Small Independent Grocery Stores

Imported products are not well positioned in this market segment. This category includes an estimated 45,000 grocery stores that are not in the above categories. Their size varies from less than 200 ft<sup>2</sup> to 1,000 ft<sup>2</sup>. These shops have limited financial resources and are typically managed by one person. In cities, these stores may have a refrigerator. A very small number have ice cream freezers. Convenience, proximity, and consumer credit based on personal relationships with their customers are their strongest assets. Mom-and-pop stores are supplied via multiple distributors, wholesalers, and sometimes larger retailers.

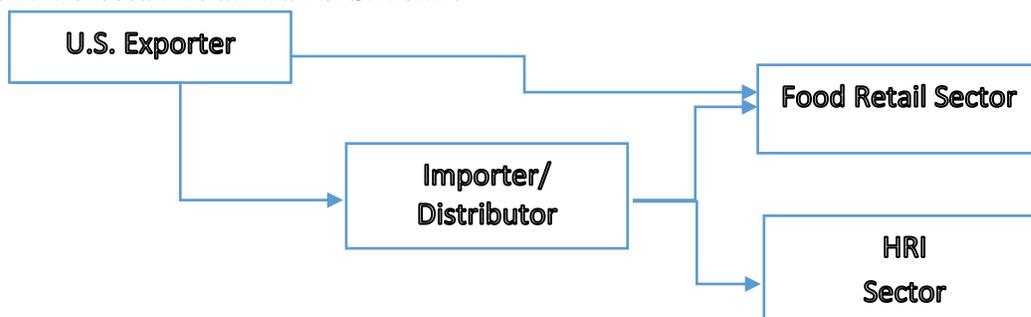
**Figure 1: Small independent grocery store**



## SECTION 2. ROAD MAP FOR MARKET ENTRY

In addition to working with the central purchasing platforms of large, modern retailers for high volume and/or private label orders, new products can also be introduced through the handful of established importers that directly supply modern retailers. Exporters may be able to meet Moroccan food retailers and their importers at [SIAL](#) (Paris), [ANUGA](#) (Germany), [ALIMENTARIA](#) (Spain), or [Gulfood](#) (Dubai). U.S. exporters are invited to contact [AgRabat@fas.usda.gov](mailto:AgRabat@fas.usda.gov) to facilitate introductions.

**Figure 2: Moroccan Retail Market Structure**



## SECTION 3. COMPETITION

**Table 5: Agricultural Products and Main Suppliers to Morocco**

Category	HS	Description	Avg Imports, 2019-22			U.S. Duty	MFN Duty	Foreign Competitors
			World	USA	%			
Meat & Poultry	0201/0202	Beef, Chilled/Frozen	\$22,083,379	\$31,162	0.1%	0%/200% <sup>1</sup>	200%	Aust, EU
	0207	Poultry, Chilled/Frozen	\$2,299,064	\$142,498	6.2%	0%100% <sup>1</sup>	100%	EU, Turk, Braz, US
Fishery Products	0302/0304	Fish, Chilled/Frozen	\$22,502,999	\$34,318	0.2%	0%	10%	EU, UK
	0306	Crustaceans	\$89,410,638	\$0	0.0%	0%	40%	EU, Cand, AR
	0307	Molluscs	\$41,371,275	\$424,064	1.0%	0%	10%	EU, Chin
Dairy	0406	Cheese	\$116,495,969	\$1,669,462	1.4%	0%	25%	US, EU, Egt
Vegetables	0710	Vegetables, Frozen	\$769,634	\$19,667	2.6%	0%	25%	EU, US, Egt
Fruits & Nuts	080211/080212	Almonds	\$81,062,437	\$78,993,880	97.4%	0%	40%	US, EU
	080250/080251	Pistachios	\$7,194,639	\$3,707,116	51.5%	0%	2.5%	US, Iran, EU
	080410	Dates	\$173,604,841	\$1,643	0.0%	0%	40%	UAE, Tuni
	080620	Raisins	\$14,556,381	\$7	0.0%	0%	30%	India, Turk, Uzb
	080810	Apples, Fresh	\$5,067,014	\$19,105	0.4%	0%	40%	EU, Aust, US
	080820/080830	Pears, Fresh	\$31,367,139	\$0	0.0%	0%	40%	EU, Arg, Chile
	081320	Prunes, Dried	\$64,305	\$0	0.0%	0%	30%	EU
Coffee, Tea, Spice	0902	Tea	\$211,551,800	\$86,025	0.0%	0%	32.5%	Chin, India
	0904/0910	Spices	\$50,169,792	\$9,246	0.0%	0%	2.5%	Braz, VT, EU
Cereals	1006	Rice	\$29,947,533	\$2,234,041	7.5%	0%	2.5%	Thai, India, US
Oils	150910	Olive Oil, Virgin	\$7,171,465	\$0	0.0%	0%	40%	EU, Tuni
Meat Products	1602	Meat & Poultry, Prep/Pres	\$16,194,481	\$44,433	0.3%	0%	40%	EU, Braz
	1604	Fish, Prep/Pres	\$27,163,177	\$10,872	0.0%	0%	40%	Sengl, EU
Confection	170490	Sugar Confection (not gum; no cocoa)	\$15,226,246	\$65,611	0.4%	0%	25%	EU, Turk, Chin
Chocolate	1806	Cocoa Food Prods (e.g., Chocolate)	\$79,072,598	\$240,920	0.3%	0%	17.5%	EU, UAE, US
Cereal Products	190120	Mixes & Doughs	\$3,121,779	\$11,174	0.4%	0%	10%	EU, UAE, US
	1904	Cereal Food Preps-Swelling/Roasting	\$18,229,806	\$21,328	0.1%	0%	10%	EU, Tury, Chin
	1905	Bread, Pastry, Cakes, Wafers, etc.	\$102,693,174	\$2,335,932	2.3%	0%	40%	EU, Tury, Egt
Fruit, Nut & Veg Products	200190	Prep Veg/ (not pickles)	\$466,259	\$0	0.0%	0%	40%	EU, Chin
	2005	Prep Veg, Not Frzn	\$18,309,109	\$74,359	0.4%	0%	40%	EU, Chin
	2008	Prep/Pres Fruit/Nuts (not juice nor jams)	\$15,531,214	\$466,732	3.0%	0%	40%	EU, Egt, Thai
Food Products	2103	Sauces & Condiments	\$44,458,303	\$748,136	1.7%	0%	40%	EU, Egt, Chin
	210610	Protein Concentrates	\$5,911,975	\$4,456,280	75.4%	0%	10%	US, EU
	210690	Food Preparations	\$94,799,667	\$2,460,661	2.6%	0%	10%	EU, Tuni, US
Beverages, Vinegar	2202	Non-alcoholic bvg	\$33,341,041	\$50,092	0.2%	0%	40%	EU, UAE
	220300	Beer	\$11,819,341	\$3,197,998	27.1%	0%	49%	EU, Mex, Rus
	2204	Wine	\$26,679,126	\$97,309	0.4%	0%	49%	EU, US, Rus
	2208	Spirits & Liqueurs	\$35,122,607	\$3,785,764	10.8%	0%	49%	EU, US, Rus
Petfood	230910	Dog & Cat Food	\$23,978,669	\$46	0.0%	0%	2.5%	EU, Turk
Ess Oils	3301	Essential Oils	\$1,654,025	\$36,569	2.2%	0%	25%	EU, Chin

<sup>1</sup> Subject to Tariff-Rate Quota, see [2022 GAIN Report](#)

## SECTION 4: BEST PRODUCT PROSPECTS

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

- Tree nuts, including almonds

### Products not present in significant quantities but which have good sales potential:

- Prunes, Raisins, Cranberries
- Rice
- Pulses
- Apples
- Canned Fruit and Vegetables
- Dairy Products
- Frozen food, including Seafood
- Breakfast Cereals
- Food Preparations

- Confectionary
- Snack Foods, including Popcorn, Cookies, and Crackers
- Health and Diet Products
- Sauces and Condiments
- Dog and Cat Food
- Wine, Beer, Spirits
- U.S. poultry and beef, including beef livers and premium U.S. beef.

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

- Organics – labeling

## SECTION 5. KEY CONTACTS AND FUTURE INFORMATION

### Marjane Group

Route de Bouskoura (c.t.1029), commune de Ain Chock - 20150 Casablanca  
Phone : (+212) 529 02 1000  
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### Label Vie/Carrefour

Angle Av Mehdi Ben Barka et Av, Annakhil Espace  
les Lauriers- Hay Riad Phone: (+212) 537 56 9595  
Website: <http://www.labelvie.ma/>

### Aswak Essalam - YNNA Holding

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**Attachments:**

No Attachments