

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Morocco

Exporter Guide

2010

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Report Highlights:

This Exporter Guide Report provides an update of all sections, including trade data and local business and government contacts. In January 2010, the newly established National Office for Food Safety (ONSSA) assumed its function as the main agency in charge of food import and export inspections in Morocco.

SECTION I. MARKET OVERVIEW

The Kingdom of Morocco is located in the northwest corner of Africa a few miles away from Europe. It is a middle-income, moderate Arab and Muslim country. Morocco was the first country to officially recognize the United States over two hundred years ago and since then the relationship between the two countries has remained uninterrupted. It is also the first African country to sign a free trade agreement (FTA) with the United States.

Morocco has no proven oil reserves, but is blessed with large deposits of phosphate and some 2,200 miles of coastline on both the Mediterranean Sea and Atlantic Ocean, which makes fisheries a major component in the economy. On average, the agriculture sector accounts for 14-20 percent of Morocco's gross domestic product (GDP). It consists of a traditional rainfall-dependent crops, fruits and vegetables as well as modern export-oriented products. Nearly three-fourths of Moroccan foreign trade is with the European Union. Morocco is mostly a bulk commodity market for the United States, but there is plenty of room to increase sales of high value products from the United States to Morocco, especially with the recently signed FTA.

The Morocco-US FTA was implemented in January 1, 2006. The agreement allowed the United States to recapture a significant market share in many traditionally traded commodities and to export, for the first time, many other commodities which were limited by high import duties. According to Moroccan import data, U.S. exports to Morocco soared to \$906 million in 2007 sustained by a weak dollar and adequate supply from the United States. According to U.S. trade data, agricultural and food exports from the U.S. to Morocco in 2009 were estimated at \$505 million, while Morocco official data put imports for that year at \$593 million.

Table 1 : United States Exports to Morocco (value \$1000)

Product	2007	2008	2009	Jan - Oct 2009	Jan - Oct 2010	P/P % Change
Intermediate Total	136,844	239,401	259,946	164,640	354,081	115
Bulk Total	504,930	198,722	213,348	178,741	215,279	20
Consumer Oriented Total	27,908	86,037	31,490	21,432	61,119	185
Forest Products	964	940	958	827	948	15
Fish Products	58	164	73	73	8	-90
Agricultural Products	669,682	524,159	504,783	364,814	630,479	73
Ag, Fish & Forest Prods	670,704	525,263	505,814	365,714	631,435	73

SOURCE: USDA/GATS

U.S. exports of agricultural and food products to Morocco soared in 2010. During the period January-October, U.S. exports were estimated at \$631 million, an increase of 73 percent compared to exports

during the same period in 2009.

Although import duties imposed by Morocco are generally high, as the FTA agreement entered its fifth year of implementation on January 1, 2010, the cuts in duties for U.S. origin products will be more significant and should provide U.S. exporters with greater opportunities to export their products to this market.

Current Economic Situation:

Morocco's economic growth fluctuates heavily with agricultural output, which is largely determined by rainfall. About 90 percent of Moroccan agriculture depends more or less on rainfall. In the past, growth has varied from 11 percent to minus 1 percent largely because of the lack of rainfall. According to the Ministry of Agriculture, the Moroccan grain harvest for 2009/2010 reached 7.46 MMT, down 21 percent compared to the 2008/2009 harvest of 10.2 MMT, but up 27 percent compared to the last 5 year average of 6.1 MMT.

Morocco's soft wheat production is estimated at 3.25 million tons, down 24.4 percent from the previous year, while durum wheat production is estimated at 1.64 million tones, 22 percent lower than the previous crop. To protect local producers from foreign competition, the Government of Morocco set a 135 percent import duty on common wheat that was later suspended until December 31, 2010. Similarly, an 80 percent import duty on durum wheat was also suspended until the end of December 2010. The suspension of import duties is intended to offset the increase in wheat prices in the international market.

In April 2008, the Ministry of Agriculture announced its new strategy for agricultural development in Morocco. In addition to calling for reform of water policy, food standards, marketing, etc., the so-called "Green Morocco Plan" strategy has two main components: Pillar I and Pillar II

- Attract investments by making about 50,000 hectares of land available to investors each year in order to overcome the land tenure catch-22 situation. The example of the state farms recently leased to the private sector that successfully attracted considerable investments, created jobs, and introduced new farming techniques to Morocco's rural area has probably been taken as a model.
- Encourage 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 determined. There is little government involvement in imports and processing of food products, especially consumer-oriented products. The sugar processing industry is where the GOM is involved the most, although all sugar beet and cane mills are scheduled to be privatized. The GOM completely phased out the subsidy for vegetable oil but it is still heavily subsidizing sugar and some wheat flour at the retail level to make them accessible to the low-income population.

Remittances from over 3.5 million Moroccans working abroad (in Europe) and revenues from the over 5.0 million foreign tourists visiting Morocco each year help offset the negative trade balance. These revenue sources help replenish foreign exchange reserves to a record level - currently at over \$9 billion, which represents the equivalent of over 11 months of Morocco's imports. Foreign investments have reached a record high and continue to increase as more investment is flowing in from Europe and Middle East Countries.

Banking System:

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

Key Demographic Development:

Morocco's population is estimated at about 34 million, of which about half live in the rural areas. The population grows at about 1.5 percent and an estimated 55 percent of the population is less than 25 years old. The middle class is steadily increasing and the family size is becoming smaller (average of 3-4 children). The illiteracy rate is about 40% and is much higher in the rural areas. Islam is the prevailing religion (over 97%). Arabic is the prevailing language and while Moroccans understand classical Arabic, they use mostly the local dialect that classical Arabic speakers may find hard to understand. French is the most widely used business language.

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, which results in higher income for the family but also forces its members, when they can afford it, to turn to ready-for-use or semi-processed products instead of traditional, time-consuming, homemade products. This is particularly true in large cities such as 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. It has been estimated that about 10 percent of the population (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 since the establishment of a labor law in 2005 to change working hours (no mid-day break) for public and private sector institutions. Many of the working Moroccans who are not able return home for the mid-day meals now take 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 past few years.

Table 2: Advantages and Challenges

Advantages	Challenges
Morocco has a FTA with US. Some products have immediate preferential access. On the long term, duties for most products will be phased out.	Morocco has free trade agreement with an increasing number of countries including EU, Dubai, Turkey, and Arab countries.
Local production fluctuates widely with the weather, which makes Morocco dependent on imports.	Geographical disadvantage (Europe is a few miles from Morocco) resulting in high U.S. shipping cost.
Many high value food products are not known to the Moroccan consumer, which means there is room for many new products.	French continues to be the predominant business language. 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 population. An estimated 10 % of the population (3 million) is able to buy imported products regularly.
Fast developing modern distribution channels offering room to develop new branded products.	Traditional distribution networks are still predominant for many food products, especially 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 many products, some of the benefit of the FTA will be tangible only in the medium and long terms.
American products are synonymous with quality in many 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 the Attaché report: Food and Agricultural Imports Regulation and Standards Report (FAIRS) MO1012 at <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>
- For export certificates required by Morocco please refer to MO1014 at <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>
- In all major ports and airports, the Ministry of Agriculture has one-stop shops for importers to clear all kinds of imported agricultural products. The entity in charge is the DCQ (Direction du Contrôle de la Qualité) which is a regional representative of the National Office for Food Safety (ONSSA). To clear Customs, importers are required to present a sanitary certificate for all animal food and fresh fruit and 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 U.S. 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 business language. Exporters with French capabilities or French written promotional materials will definitely have an advantage in communicating with importers.
- Imports and distribution of food and beverage products in Morocco are handled both by regular importers as well as importers who operate on an opportunity basis. Regular importers market their products through their own sales force (typically to hotels, supermarkets, wholesalers) and through independent well-established wholesalers (in case of small shops, restaurants). U.S. exporters interested in selling consumer-ready food or beverage products should find a local importer to access the retail market. Importers normally have in-depth knowledge of specific importing procedures.
- Telecommunications are generally adequate. Internet and email are available in most hotels and

"Cyber Café" shops throughout Morocco. Phone calls from hotels can be excessively expensive but cell phone and reusable phone cards can be purchased locally at a very reasonable price.

- 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 during this period is unavoidable exporters should concentrate their meetings in the morning. Surprisingly, consumption of some products (such as honey, sugar, butter, vegetable oil, dairy products, etc.) increases during Ramadan. In 2010, Ramadan started mid-August.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The limiting factor to the increase in demand for consumer-oriented products is the low income. U.S. exports of consumer products to Morocco registered a significant increase, reaching \$32 million in 2009. This was mostly due to lowering the import duties for some of these products under the U.S.-Morocco FTA.

Although the retail food outlets in Morocco continue to be dominated by a large number of small grocery stores (an estimated over 90 percent of stores are less than 225 square feet large), the number of supermarkets has been increasing considerably in recent years and more are under construction, especially in large cities. Today, in addition to the estimated 200 small self-service shops (2 registers, 1000 ft² - 3500 ft²) there are about 50 large supermarkets, of which 26 are large and comparable to large supermarkets in the United States. All supermarkets are privately owned and some have been opened by multinational chains or as a joint venture with Moroccan investors. Also, over the last few years a number of modern self-service retail outlets, including convenience stores, opened in major cities and this trend is likely to continue in the future.

Importers still 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, have also been importing directly through their buying platforms in Europe, all supermarkets get their products either directly from importers or from wholesalers. It is not uncommon that importers are also wholesalers. Many importers prefer direct contact with suppliers as they feel that middlemen complicate transactions, lower profits, and could 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 (an estimated 1 million TV satellite dishes). Thus, the steady Western influence on Moroccan lifestyles is expected to result in even higher demand for consumer-oriented products in the 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 (Europe). However, this situation may improve in the coming years with the opening in 2009 of a direct shipping line between the Moroccan port of Tanger-Med and the port of Norfolk, VA in the U.S. East Coast.

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 such as sugar processing mills, and alcoholic beverage manufacturers. 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 significantly their production over the past few years, the range of products they are putting on the market is still very small and is unlikely to fulfill all the demand. The 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 develop further in the future to withstand stiffer competition. Many local producers (biscuit plants, 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):

In 2009, Morocco received about 8.3 million visitors, mostly tourists from Europe but also from the United States, and about 1.13 millions Moroccans leaving oversea. The GOM's ambitious plan to reach 10 million tourists by 2010 is unlikely to be realized due to the current global economic slowdown.

Recently, the GOM launched a revision of this plan aiming to reach 20 million tourists by 2020. However, large modern hotels are still popping up throughout the country, which is expected to boost the demand for food packaged for services. In addition, the annual (July-August) visit of about 2 million expatriate based in Europe boosts consumption significantly, especially in the tourism sector.

Although there are over 640 graded hotels in Morocco, the potential market for U.S. consumer-oriented products consists essentially of some 41 upscale hotels (5 stars) concentrated mostly in Agadir, Marrakech, Casablanca, Rabat, and Fes, about 25 tourist villages and clubs, and over 139 hotels graded

as 4 stars. Other hotels target lower income customers and don't offer regularly imported food and beverages to their clients. Most hotels purchase their food products from local distributors that are also in some cases 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.

In addition to Moroccan, Asian, and other specialty restaurants, there are some 246 Western-style restaurants in Morocco that do or may potentially use imported products on a regular basis. Most of these restaurants buy directly from local distributors/importers because of the low volume involved. U.S. exporters are strongly encouraged to go through the established importers that have their own sales forces.

Export of Seafood Products to Morocco:

Although Morocco is a net exporter of fish products over \$600 million, there is a window for some U.S. seafood products especially since under FTA most fish products will be exonerated from customs duties. The demand should come mostly from the upper class hotels and restaurants located in major cities. The per capita consumption of fish is low in Morocco and consists mostly of fresh low-priced pelagic species such as sardines. Inadequate distribution channels have been a major limiting factor to increased fish consumption. Thus, few importers have appropriate facilities and refrigerated trucks to supply frozen food to supermarkets. Also, few supermarkets have equipment to handle and exhibit frozen or refrigerated fish. It is estimated that less than 40 percent of Moroccan families have refrigerators at home.

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 small 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 have all opened during the past 10 years. More outlets are scheduled to open in the near future in response to the higher demand for quality, "Western type" food. The rapid growth in the sector stems from major economic changes in Morocco, including economic growth, higher disposable income, and the increased number of women working outside homes. The development of U.S. fast food outlets in Morocco has resulted in an increase of imports of food ingredients, including from the United States, which the local industry is unable to provide on a regular basis. The US-FTA will increase this opportunity since many food ingredients (cheese, chicken nuggets,) have significant preferential access

to the Moroccan market.

SECTION IV. BEST HIGH VALUE PRODUCT PROSPECTS

The Morocco-US FTA has provisions by which duties levied against U.S. agricultural products will eventually be phased out for most agricultural products. For many products, the preferential access will be significant enough to warrant increased trade in the medium term.

Dairy Products: skimmed milk, butter, cheese, and whey) including for food processors and HRI. Butter currently exempted from import duty from all origins. Milk Powder 60%, Whey 17.5%, and Cheese 75%. Significant tariff cuts for U.S. cheese. Whey from U.S. is duty free. Exports from the U.S. soared in 2008.

Fresh Apples and Pears: Provision for 2,340 MT duty free quotas under U.S. Morocco FTA. Quota opens Feb.1-May 31. First Come – First Serve

Dry Fruits and Nuts: Provisions for 4,000MT dried raisins, 1,500 MT Prunes; 1,000 MT Almonds. 5 years average import growth 35 % for dried raisins. Prune import depends on local crop. Imports duties are 50 to 53.5%. Under the FTA U.S. has duty free access for pistachios/ pecan seed. For other nuts duties go down in 8 to 10 years. 50 tons plus duty free almonds quota.

Beef: < 600 MT mostly hamburger patties. No beef cuts have been imported (prohibitive tariffs). About 9,000 MT of beef carcasses for military mostly from Argentina. (Duty free from all origins). The U.S. beef quota under the FTA has not been yet utilized due to the lack of an approved import health certificate that is currently undergoing negotiation between USDA/APHIS and the Moroccan Vet Services.

Poultry: Morocco's imports in 2009 are estimated at 1,500 MT to 2,000 MT of de-boned, frozen, turkey meat from Europe (Belgium). Tariff rate of imports is 124 % ad valorem. U.S. has a quota of 4,800 MT of chicken leg quarters and wings at preferential rate. The U.S. poultry meat quota under the FTA has not been yet utilized due the lack of an approved import health certificate that is currently undergoing negotiation between USDA/APHIS and the Moroccan Vet Services.

Canned Fruits and Vegetables: Market size is about 15,000 MT. Morocco's imports in 2009 is estimated at 5,650 MT.

Average imports tariff rate is estimated at 50%.

Pulses *Eston type lentils, white kidney beans, demand increase during the month of Ramadan.* The market size is estimated at 80,000MT. In 2009, Morocco imports 13,000 MT. Import duties are 50%.

Popcorn Large 50 Lbs bags. The market size is about 1500 MT. Morocco import is estimated at 1500 MT in 2009. Average import tariff rate is about 50%.

Honey Peak demand during Ramadan. The market size is about 30000 MT. Morocco imports 1817 MT in 2009. Average import tariff rate is about 50%.

Sauces and Condiments including for HRI. The market size is about 1,000 MT. Morocco's imports are estimated at 900 MT in 2009. Average import tariff rate is 50%.

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

The Foreign Agriculture Service 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:

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

<http://www.usembassy.ma/services/fas/AgFTA.htm>

Local Contacts:

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Food Shows / Promotion Opportunities:**CASABLANCA AMERICAN CAFE**

Tentative Date: June, 2012

Venue: Casablanca

Target Audience: U.S. Food exporters and Moroccan Food importers and distributors.

This is a prime opportunity to exhibit U.S. high-value foods and meet one-to-one with Moroccan food importers and distributors in Morocco. The show will be sponsored and organized by the FAS office in Rabat and would likely take place in June 2012. The show is for U.S. food products only. The list of business invitees from Morocco, Algeria, and Tunisia is tailored to the exhibited products. The attendees are carefully selected and consist strictly of importers, food brokers, distributors, hotel and restaurant managers, suppliers of institutions, etc. In conjunction with this exhibition, the Agricultural Affairs Office organizes a market briefing and tour for U.S. exporters.

Contact Info: Agricultural Attaches' Office, Rabat FAS/USDA

Phone: (212-53) 770-1135 Fax: (212-53) 776-5493

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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: 2011 Holidays Schedule

DATE	HOLIDAY
31-Dec	New Year, 2011
11-Jan	PRESENTATION OF MOROCCAN INDEPENDENCE PROCLAMATION
17-Jan	MARTIN LUTHER KING'S BIRTHDAY
February 16/17	EID MAWLID AN NABBAOUI-Birthday of prophet Mohammed
21-Feb	PRESIDENT'S DAY
May 1**	MOROCCAN LABOR DAY
30-May	MEMORIAL DAY
4-Jul	AMERICAN INDEPENDENCE DAY
July 30**	FEAST OF THE THRONE
	King's Mohammed VI ascension to the throne
August 20**	REVOLUTION OF THE KING AND THE PEOPLE
August 21**	YOUTH DAY-King's Mohammed VI birthday
Aug 31 & Sept 1	EID AL FITR-Celebration of end of Ramadan
5-Sep	AMERICAN LABOR DAY
October 10	COLUMBUS DAY
November 7&8	EID AL ADHA- Muslims' feast of sacrifice
11-Nov	VETERAN'S DAY
18-Nov	FEAST OF INDEPENDENCE-Morocco's independence-1956
24-Nov	THANKSGIVING DAY
27-Nov	FIRST MOHARRAM-Muslims' New Year
26-Dec	CHRISTMAS DAY

Table A: Key Trade & Demographic Information

Agricultural Imports From All Countries (\$Mil.) / U.S. Market Share (%)	4393	14
Consumer Food Imports From All Countries (\$Mil.)/US Market Share(%)	508	<14
Edible Fishery Imports From All Countries (\$Mil.)/US Market Share (%)	73	<1
Total Population (Millions) / Annual Growth Rate (%)	34	1.5
Urban Population (Millions) / Annual Growth Rate (%)	18	1.5
Number of Major Metropolitan Areas (a)	11	
Size of the Middle Class (b) (Millions) / Growth Rate (%) (b)	3	2.0
Per Capita Gross Domestic Products (\$U.S.)	1,548	
Unemployment Rate (%)	10	
Per Capita Food Expenditures (\$U.S.) (C)	320	
Percent of Female Population Employed	25.8	
Indicative Exchange Rate (US \$1 is :)	8.1 dirhams	

(a) Population in Excess of 500,000

(b) Estimated Population that can regularly purchase imported food products.

(c) AgAtt Estimates. There is a large variation in revenue especially between urban and rural areas and a large part of the economy unaccounted for.

Table B: Consumer Food & Edible Fishery Products Imports-2008-2009 in \$million

Calendar Year	Total Morocco Imports		Imports from USA	
	2008	2009	2008	2009
Total High Value Products	529	508	76	46
Milk Powder	78	75	28	13

Butter	70	67	27	15
Baby Formula	33	32	0	0
Frozen Beef	34	33	0	0
Other Dairy (Mixes)	30	29	7	5
Biscuits	22	21	0	0
Whisky/Vodka	25	24	0	0
Chocolate Bars	15	14	0	0
Wine	14	13	0	0
Cheeses	23	22	8	6
Chocolate, Confectionary	11	11	0	0
Cereal Derivatives	7	7	0	0
Spices Flavoring	6	6	0	0
Banana	7	7	0	0
Pasta	8	8	0	0
Canned Vegetables	5	5	0	0
Fresh Onion and Similar	5	5	0	0
Soft Drinks, Carbon.	6	6	0	0
Whey	8	8	2	2
Fresh Apples	9	9	2	1
Dried Raisins	4	4	0	0
Ice Cream	4	4	0	0
Ground Beef	2	2	0	0
Corn Based Cereals	3	3		
Almonds	6	6	3	4
Sauces Seasonings	3	3	0	0
Pet Food	2	2	0	0
Orange Juice Frozen	3	3	0	0
Total Seafood	76	73	0	0
Frozen Fish	13.1	13	0	0
Smoked/Brine/Salted	11.2	11	0	0
Shrimp Frozen	9.6	9	0	0
Canned	9	9	0	0
Shrimp, Refrigerated	4.5	4	0	0
Canned Tuna	4.6	4	0	0
Fresh or Chilled	3.5	3	0	0
Squids	2.6	2	0	0
Agricultural Products Total	5780	4,035	711	681
Agr., Fish, Forestry Total	5857	4,393	712	683

Note: Indicative Exchange Rate (\$/dh) 2005: 8.892 / 2006: 8.8279 / 2007: 8.3556 / 2008:7.733/2009:8.1

Source: Moroccan Customs Data (Office des Changes)

Table C: Top 15 Suppliers of Consumer Food & Edible Fishery Products
Morocco Imports (Millions of Dollars)

Consumer Oriented Products by Country of Origin	Seafood Imports by Country of Origin
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COUNTRY	2007	2008	2009		2007	2008	2009
Total Imports	573	532.5	508	Total Imports	55	76	73
France	116	65	103	Belgium	11	10	15
Spain	38		34	Argentina	9	5	11
Netherlands	37	33	33	Spain	7	11	9
Tunisia	33		29	Netherlands	7	14	10
United Arab Emirates	29		26	Senegal	5	8	7
New Zealand	17	39	15	Cape Verde	3	0	4
Germany	23	6	20	China	3	3	4
Great Britain	18	17	16	Norway	2	3	3
Belgium	20	12	18	Great Britain	1	5	1
Ireland	8	17	7	Peru	1	0	1
Italy	14	5	12	France	1	1	1
Uruguay	18	6	16	Thailand	1	0	1
USA	22	76	20	El Salvador	1	-	1
China	11	100	10	Mauritania	1	0	1
India	11	13	10	Others Suppliers	3	16	4
Poland	11	5	10				
Argentina	16		14				
Australia	17		15				
Syria	7	5	6				
Portugal	11		10				
Egypt	6	6	5				
Turkey	6		5				
Iran	4		4				
Iraq	8		7				
Sweden	4		4				
Ivory Coast	6		5				
Others Suppliers	61	127	54				

Source: Moroccan Official Trade Date (Office des Changes)