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Morocco

Exporter Guide

Annual

2005

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Report Highlights:

The U.S. Morocco FTA is expected to be implemented January 1, 2006 and should provide U.S. agricultural exporters ample opportunities to increase exports to Morocco. Many U.S. agricultural products will benefit from substantial preferential access during the first year including products that have not traditionally enjoyed access to the Moroccan market.

Includes PSD Changes: No
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Rabat [MO1]
[MO]

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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. It 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 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. Agriculture accounts for an average of 15 percent of the gross domestic product, and consists of a traditional rainfall-dependent sector as well as modern export-oriented production. 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 is expected to be implemented on January 1, 2006. The agreement will allow the United States to recapture a significant market share in many traditionally traded commodities and to export for the first time many other commodities whose imports have been limited by the high import duties.

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. In 2004, the economy grew by 4.2 percent but is expected to grow by less than 2 percent in 2005 because of the poor agricultural output caused by the drought. The non-agricultural sector grew by about 3.0 percent in 2004. Inflation has been contained at low levels during the last decade and after a peak of 2.8 percent in 2002 has been down to 1.5 percent in 2004.

Remittances from over 2.3 million Moroccans working abroad (in Europe) and revenues from over 2.5 million tourists visiting Morocco each year help offset a 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. Also, the government is continuing its privatization policy, which results in significant income for the treasury. In 2004, the government launched a campaign to privatize some of its best agricultural land that has been under government control since the early 1970's. About 56,497 hectares representing some 205 identified projects throughout 23 provinces in Morocco have been made available for long-term lease for Moroccan and foreign investors.

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.

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. Advance payments are prohibited by the current exchange regulations. The strong Euro against the dollar should put the U.S. exporters in a better position compared to their European counterparts.

Key Demographic Development:

Morocco's population is about 30.1 million, of which 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 over 55 percent and is much higher in the rural areas. Islam is the prevailing religion. 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 business language. Employment is on the top of the government priority list, as the unemployment rate is about 20 percent in urban areas.

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 shown a rapid development 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.

Advantages and Challenges

Advantages	Challenges
Morocco has a FTA with US. Some products have instant significant 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 (Spain is a few miles from Morocco) resulting in high U.S. shipping costs especially that there is no direct shipping lines. Transit through Europe is necessary.
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.	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) MO5018 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. 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.
- 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. This year, Ramadan starts October 4/5.
- Customs duties: Typically, imported food goods are subject to an ad valorem import duty of 50 percent, a 0.25 percent ad valorem Export Promotion Tax, and in most cases a Value Added Tax (VAT) computed on top (from 0-20 percent). As an example, a typical consumer-oriented product is subject to the following tax treatment when imported into Morocco:

If the original value CIF & port charges is:	100.00 dirhams	
Ad valorem import duty	50.00 percent	
Value after import taxes:		150.00 dirhams
VAT at 20% of 150 dirhams	30.00 dirhams	
Total after customs duties and taxes		180.00 dirhams
Export Promotion Tax (0.25%)	0.25 dirhams	
Final value (all taxes and duties paid)		180.25 dirhams

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The limiting factor to the increase in demand for consumer-oriented products is the low income combined with the current high duties on imported food products.

In spite of the major changes in distribution channels over the last few years, the retail food outlets in Morocco continue to be dominated by a large number of small grocery stores. It has been estimated that 90 percent of the food retail 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 40 large supermarkets, of which 20 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 resulting from the lack of direct shipping lines between Morocco and the United States. 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).

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. 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):

Morocco receives some 2.5 million tourists, mostly from Europe but also from the United States. The GOM has committed to an ambitious plan to reach 10 million tourists by 2010, and large modern hotels are 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 1.6 million expatriate based in Europe boosts consumption significantly, especially in the tourism sector.

Although there are over 632 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 that 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 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 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, that 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) will 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 US agricultural products will eventually be phased out for most agricultural products. For many products, the preferential access will be significant to warrant increased trade in the medium term.

Product Category	2004 Market Size*	2004 Imports**	5 Year Average Import Growth	Import Tariff Rate ad valorem	Key constraints Over Market development	Market Attractiveness for USA
Beef		< 500 MT mostly hamburger patties. No beef cuts have been imported because of prohibitive tariff	1 %	275 %. US has a TRQ with a preferential tariff of 45 % initially phased out in 5 years	Morocco never imported US beef. Lack of knowledge of US beef by end users.	US can export at preferential rate 4,000 MT of high quality beef and 2,000 MT quota for standard beef. The in quota tariff is significantly lower and will be phased out completely in 5 years.
Poultry		1,500 MT to 2,000 MT of de-boned, hashed, Frozen, Turkey meat	3%	Too high (124%) to allow any significant imports in the past	High duties (124%). Consumers not used to buy frozen chicken.	US can export 4,000 MT of chicken leg quarters and wings at preferential rate (60 %).
Fresh Apples and Pears Red and Golden Delicious, Fuji	300,000 MT	4,216 MT	Up to 7,000 MT in 1998	53.5%	Stiff competition from France, Spain, and Chile.	Provision for 2,000 MT duty free quota under FTA. For export from February through May. Niche for high quality apples not produced locally.
Dairy Products Skimmed milk, butter, cheese, and whey) including for food processors and HRI.	30,000 MT butter. Milk Powder 40,000 MT	Butter 30,000 MT. Milk Powder 13000 MT. Cheese 5,000MT. Whey 1,000MT.	15 % for all.	Butter 32.5% Milk Powder 60% Whey 17.5% Cheese 75%.	EU has Tariff Rate Quota.	Relatively large market size. Also fresh milk during Ramadan to cover shortage. US whey products and cheese pizza will enter duty free under FTA. Duties on other cheese down in 5 years.
Dry Fruits and Nuts (Raisins, Almonds, Prunes, Pistachios, apricots, and walnuts) Including semi-processed almonds for HRI/services	NA	4,000MT Dried raisins. 1,500MT Prunes. 1,000MT Almonds,	35 % for dried raisins. Prune import depends on local crop	50 to 53.5%	Price. US exporters not active in this market.	Under FTA US had duty free access for pistachios and pecan seed. For other nuts duties go down in 8 to 10 years. Moroccan importers are eager to buy from US. Some interested in branded products, other not.
Pulses (Eston type lentils, white kidney beans, chickpeas, green split peas) A peak of demand for lentils and chick peas during Ramadan	A total of 80,000MT	14,000 MT	Varies with size of local production Imports in year 2000: 77,000 MT	50 %	Price is key. Very small quantity is sold packaged.	Large volumes especially in drought years when local production is down.
Canned Fruit and Vegetables Canned mushrooms, canned corn, canned pineapple, canned mixed fruit, etc..) Including for HRI	15,000 MT	5,150 MT	3%	50%	Price and regular supply. Some importers are after branded products	Demand for HRI is increasing.
Popcorn Large bags but also more recently some interest for microwave popcorn	*1500 MT	1500 MT	2%		Competition from Argentina	Good image of U.S. popcorn
Honey	*30000	1,216 MT	3 %	50 %	Spain is a major	Used extensively and

Peak demand during Ramadan Barrels and 2-5lbs packaging.	MT	honey			supplier.	traditionally for Moroccan cookies.
Sauces and Condiments including for HRI	1,000 MT	800 MT	Slow growth in retail sales. Potential for HRI	50%		Already selling. U.S. origin enjoys good reputation. Soy sauce will be duty free from the US under FTA.

* Estimated. ** Using Moroccan Trade Data

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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:

Mr. Michael FAY, Agricultural Attaché [Email:Michael.fay@usda.gov](mailto:Michael.fay@usda.gov)
Mr. Aziz ABDELALI, Agricultural Specialist [Email:Aziz.Abdelali@usda.gov](mailto:Aziz.Abdelali@usda.gov)
 Phone: (212-3) 776-2265 Fax:(212-3) 776-5493
 US Address: American Embassy, Rabat - PSC 74, Box 002, APO AE 09718
 Local Address: 2, Avenue Ahmed El Fassi, Rabat, Morocco

Local Contacts:

Head of Plant Protection, Food Control
 Directeur, Protection Vegetaux, Control Technique et Repression des Fraudes
 Ministere de l'Agriculture et du Developpement Rural
 Station Dbagh, Avenue Hassan II, B.P. 1308, Rabat, Morocco
 Phone: (212-3) 729-7543/729-7545 Fax: (212-3) 729-7544
 MINISTRY OF AGRICULTURE, PLANT PROTECTION, FOOD REGULATION

Head of Livestock Division
 Ministere de l'Agriculture, du Developpement Rural
 Rue Abderrahman El Ghafiqui, Agdal, Rabat, Morocco
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 MINISTRY OF AGRICULTURE, ANIMAL HEALTH & SANITARY REGULATION

Ministere de l'Economie et des Finances - Direction des Douanes
 Hay Ryad, Rabat, Morocco
 Phone: (212-3) 771-7800/771-7801 Fax:(212-3) 771-7814/771-7515
 Website: <http://www.douane.gov.ma>
 CUSTOMS OFFICE, TAX, CUSTOMS DUTIES

Office des Foires et des Expositions de Casablanca (OFEC)
 Phone: (212-2) 265098/222813 Fax:(212-2) 226-4949
 11, Rue Jule Mauran, Casablanca, Morocco
 Email: foire@ofec.co.ma
 Website: www.ofec.co.ma
 FAIR, SHOWS, FOOD SHOWS

Hotels:

Hotel Sheraton-Casablanca
 Phone: (212-2) 231-7878/243-9494

Fax:(212-2) 231-5136/231-5137
Avenue des F.A.R., Casablanca, Morocco

Hyatt Regency-Casablanca
Phone:(212-2) 226-1234
Fax:(212-2)220-4446
Avenue Hassan II, Casablanca, Morocco

Hotel Royal El Mansour
Phone:(212-2) 231-2112
Fax:(212-2) 231-4818
Avenue des F.A.R., Casablanca, Morocco

Holiday Inn Crown Plaza
Phone:(212-2) 229-4949/229-3434
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Avenue Hassan II, Casablanca, Morocco

Food Shows / Promotion Opportunities:

☐ **CASABLANCA AMERICAN CAFÉ**

Tentative Date: June 2006

Venue: Casablanca

Target Audience: US Food exporters and Moroccan Food importers and distributors.

Prime opportunity to exhibit U.S. high-value foods and meet one-to-one with Moroccan food importers and distributors in Morocco.

The show is sponsored and organized by USDA. The Moroccan 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 Attaché's Office, Rabat FAS/USDA

Phone: (212-3) 770-1135 Fax: (212-3) 776-5493

Email: AgRabat@usda.gov or Aziz.Abdelali@usda.gov

Workdays / Hours:

- Working days in Morocco are Monday through Friday.
- Morocco is on Greenwich Mean Time (GMT).
- Typically, working hours are 8:30-12:00 and 2:30 pm - 6:30 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:

DATE	DAY(S)	HOLIDAY
January 2	Monday	New Year U.S. / Moroccan
January 11	Wednesday	Moroccan Independence Day
January 11 & 12	Wednesday/ Thursday	Aid Adha
January 16	Monday	Martin Luther King Birthday (US)
January 31	Tuesday	Moharram (Muslim's New Year)
February 20	Monday	President's Day (US)
April 11 & 12	Tuesday /Wednesday	Prophete Birthday
May 1	Monday	Moroccan Labor Day
May 29	Monday	Memorial Day (US)
July 4	Tuesday	Independence Day (US)
August 21	Monday	King's Birth Day
September 4	Monday	Labor Day (US)
October 9	Monday	Columbus Day (US)
October 24/25	Tuesday /Wednesday	End of Ramadan Celebration
November 10	Friday	Veteran's Day (US)
November 6	Monday	Green March Day
November 23	Thursday	Thanks Giving (US)
December 25	Monday	Christmas (US)

Table A: Key Trade & Demographic Information

Agricultural Imports From All Countries (\$Mil.) / U.S. Market Share (%)	2,354	11.7
Consumer Food Imports From All Countries (\$Mil.)/US Market Share (%)	330	<1
Edible Fishery Imports From All Countries (\$Mil.)/US Market Share (%)	31	<1
Total Population (Millions) / Annual Growth Rate (%)	30	1.5
Urban Population (Millions) / Annual Growth Rate (%)	16	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 (%)	20	
Per Capita Food Expenditures (\$U.S.) ^(c)	320	
Percent of Female Population Employed	25.8	
Indicative Exchange Rate (US \$1 is:)	9.00 dirhams	

(a) Population in Excess of 500,000

(b) Estimated Population than 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
Morocco Imports, Millions of Dollars**

	Imports from The World			Imports from United STATES			United States Market Share %		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
CONSUMER-ORIENTED AG. TOTAL	210	240	273	3	1	2	1	1	1
Snack Foods (Excl. Nuts)	9	12	16	1	-	-	-	-	-
Breakfast Cereals & Pancake Mix	1	2	3	-	1	-	-	2	-
Red Meats, Fresh/Chilled/Frozen	1	2	1	-	1	-	-	-	-
Red Meats, Prepared/Preserved	1	1	2	1	-	-	6	-	-
Poultry Meat	1	2	1	1	1	-	-	2	-
Dairy Products (Excl. Cheese)	84	85	88	1	1	-	1	-	-
Cheese	9	11	13	-	1	1	-	-	-
Eggs & Products	1	1	1	-	-	-	-	-	-
Fresh Fruit	15	20	15	1	1	1	-	-	-
Fresh Vegetables	15	19	24	-	-	-	-	-	-
Processed Fruit & Vegetables	11	11	13	1	1	1	1	1	1
Fruit & Vegetable Juices	2	4	4	1	1	-	-	1	-
Tree Nuts	1	2	4	1	1	1	13	5	28
Wine & Beer	4	5	9	1	1	1	2	-	-
Nursery Products & Cut Flowers	7	11	16	1	1	1	1	1	1
Pet Foods (Dog & Cat Food)	1	1	1	1	1	1	2	3	1
Other Consumer-Oriented Products	44	53	61	1	1	1	3	1	1
FISH & SEAFOOD PRODUCTS	8	12	19	1	1	1	0	0	0
Salmon	1	1	1	-	-	1	-	-	3
Surimi	1	1	1	-	-	-	-	-	-
Crustaceans	2	3	4	-	-	-	-	-	-
Ground fish & Flatfish	1	2	2	-	-	-	-	-	-
Mollusks	1	1	1	1	-	-	22	-	-
Other Fishery Products	5	7	12	-	1	1	-	-	1
AGRIC. PRODUCTS TOTAL	1,629	1,702	1,478	144	149	113	9	9	8
AGRIC. FISH & FORESTRY TOTAL	1,816	1,935	1,765	144	149	113	8	8	6

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

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

Calendar Year	CONSUMER-ORIENTED PRODUCTS				FISH & SEAFOOD PRODUCTS		
	2001	2002	2003		2001	2002	2003
France	43,553	44,987	49,306	Spain	3,523	4,304	7,988
Netherlands	24,055	20,887	33,720	Netherlands	1,899	2,768	3,901
Spain	23,860	34,219	32,521	Argentina	439	396	1,746
Ireland	10,836	7,594	17,080	Senegal	3	37	1,448
United Kingdom	7,029	10,749	16,889	Belgium	487	566	825
Tunisia	10,265	12,514	11,947	France	610	839	761
New Zealand	12,352	15,665	10,755	Chile	238	127	504
Belgium	4,395	6,685	10,203	Norway	218	348	400
Germany	7,499	9,611	9,432	Denmark	148	40	322
Italy	4,302	5,379	8,360	United Kingdom	72	194	224
Denmark	2,350	7,537	7,965	Thailand	-	23	191
Iran	3,927	6,409	6,388	Indonesia	54	158	188
China	2,242	4,147	4,812	Mauritania	-	561	144
Turkey	2,376	3,551	4,368	China	184	20	143
Portugal	1,741	3,653	3,816	Germany	42	5	102
Egypt	3,341	2,811	3,730	United States	22	24	92
India	1,170	1,849	3,268	Italy	6	312	85
Poland	2,459	1,378	3,238	Peru	-	158	49
Finland	3,762	5,007	3,213	Tunisia	-	3	40
Switzerland	1,320	3,153	3,180	Iran	1	47	36
Argentina	621	2,268	2,325	Yemen	-	46	28
United States	2,528	1,245	2,258	Bangladesh	-	26	24
Syria	1,796	2,039	2,170	Seychelles	-	37	14
Brazil	1,179	1,689	2,094	Korea, Republic of	-	-	13
Australia	4,437	6,424	2,053	Mozambique	-	-	12
World	209,641	240,378	272,920	World	8,170	11,668	19,315

Source: United Nations Statistics Division