



FOOD & BEVERAGE SECTOR IN MOROCCO

Swedish Trade Council Maghreb
February 2010

AGENDA

- **Key facts Morocco**
- Food & beverage industry overview
- Future development of the sector
- Appendix



MOROCCO

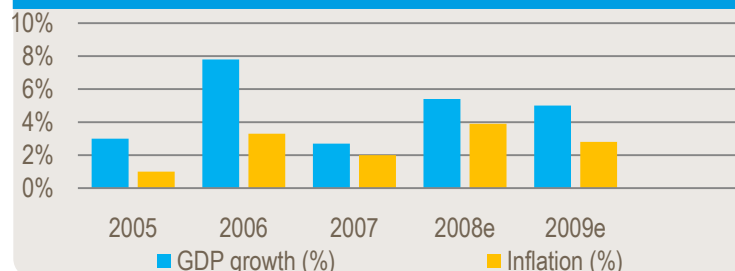
Basic facts

Government:	Monarchy
Chief of State:	King Mohammed VI
Population:	31,9 million (2009)
Area:	710,000 km2 (incl. WS)
Capital:	Rabat
GDP real growth:	5% (estimation 2009)
GDP/Capita PPP:	\$ 4,350 (2008)
Inflation:	3% (estimation 2009)
Currency:	1 SEK = 1,12 MAD (Oct 2009)
Religion:	Sunni Islam , Jewish minority
Languages:	Arabic (official), French
Export goods:	textile & leather , mechanical & electric products, agriculture
FDI 2007:	4, 7 Billion USD (3rd in Africa)

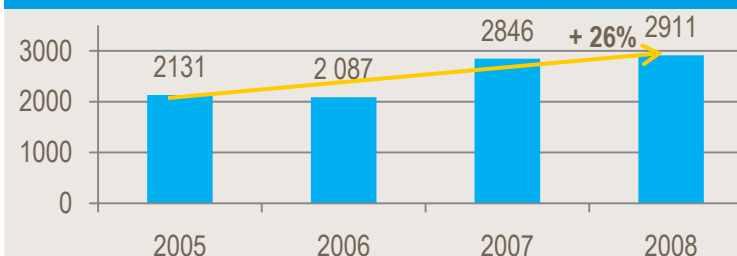
Morocco



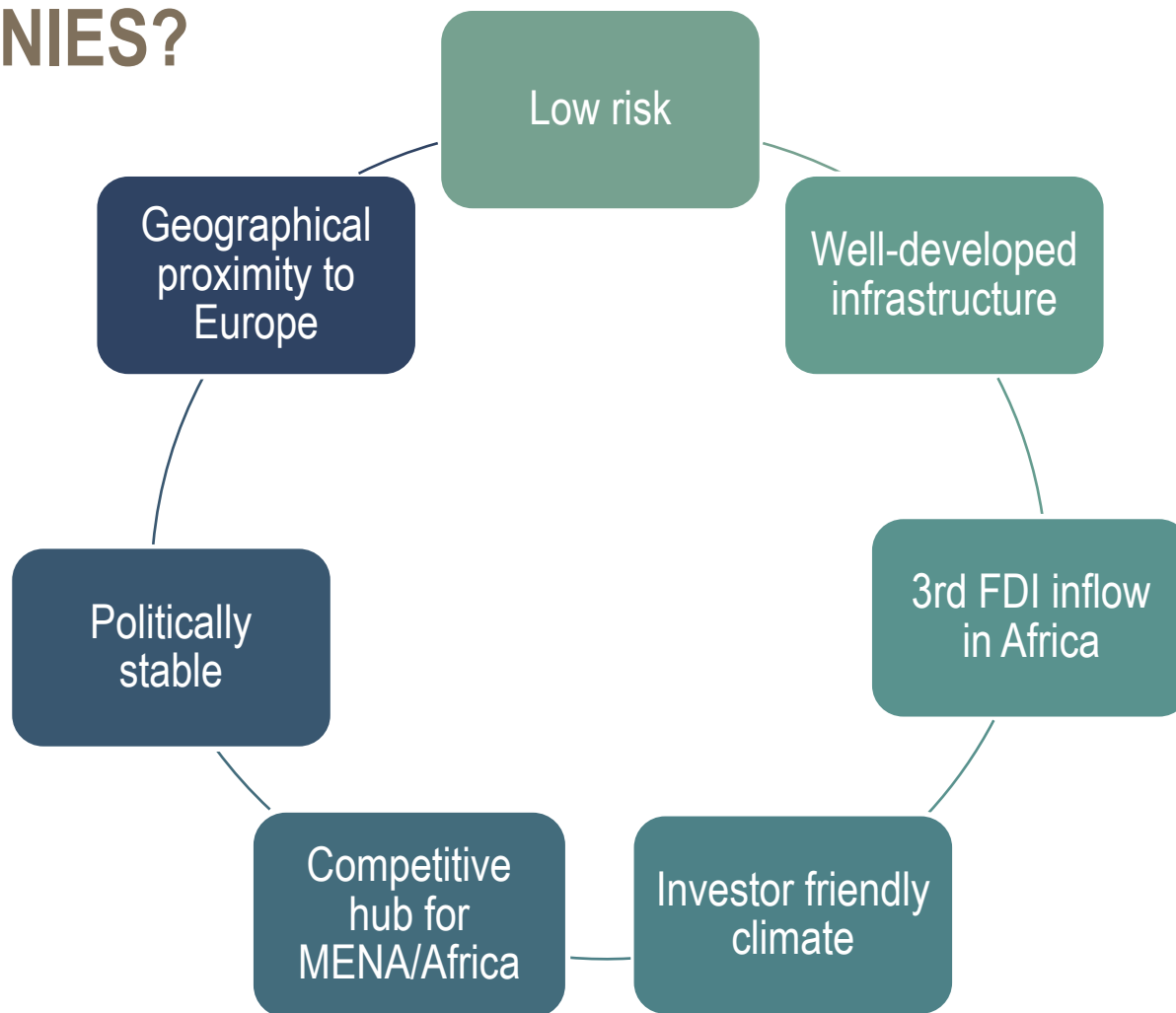
Real GDP/Inflation rate



Swedish Exports to Morocco in MSEK



WHY IS MOROCCO INTERESTING FOR SWEDISH COMPANIES?



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MOROCCAN FOOD & BEVERAGE INDUSTRY OVERVIEW

- Agriculture accounted between 12 and 20 percent of the total Moroccan GDP
Food & Beverage industry account for 8 percent of the total GDP.
- F&B industry generates 8 billions dollars, Morocco export 1.5 billion dollar of agro-food products.



MOROCCAN FOOD & BEVERAGE INDUSTRY OVERVIEW

- There are 2000 companies working within the food industry the most important national companies are belonging to the ONA group in addition to Multinational companies such as Coca cola, UNILEVER, Nestle
- The main food & industry products: Vegetables Cans, Fruit juice, Biscuits, Corn cans, Fast food Products, Pet foods, Sauces, Corn Flacks, Pasta, product designated to Hotels (portion jam..), Snack products, Beers.





FISH INDUSTRY IN MOROCCO

- Morocco export 600 Million Dollars of fish product which represent 40% of Morocco food & beverage products exportation. The main importing countries are the European unions, USA, Japan.
- Morocco is the first exporter in the world of Sardine Pilchardus, and the third exporter in the world of Agar Agar product.
- This industry has 406 unity inland and 390 boats with refrigeration system and employs 75000 person.

Product	Ton/Year	Turnover/year
Canned fish	320000	370MEUR
Semi canned	16000	80MEUR
Frozen fish	114000	439MEUR
Fish flour	61000	
Seaweeds	4000	20MEUR

WINE & FRUIT JUICE INDUSTRY IN MOROCCO

- There are two major companies producing juice the first one is Moroccan Food Processing with a capital of 60 Million dollars and the second company is COVEM, Coca cola also entered the market by buying FURMAT.
- Rostoy established itself in Morocco since 2006 it produces 10 million liters of juice for national and international consumption.
- Morocco produces about 37 million bottle of wine (78% red wine, 18% gray and rose wine, 4 % white wine). Cellier de Meknes is the biggest wine Moroccan Company, the French company Castel is also producing wine in Morocco.
- Beer is also produced by Brasseries du Maroc, the company produces 900 000 hl/year



MILK INDUSTRY IN MOROCCO

- Facts (year 2000):
 - Pasteurize Milk: 470 million Litters
 - Cheese product: 1500 tons
 - Butter: 8099 tons
 - Sour milk: 20 Million litters
 - Powder milk: 10250 tons
 - Morocco import 2,5 Millions of litters of milk every year (2005)

- Central laitiere with 500 million litters per year (70% market share) and Copag Jouda with 500000 liter/day (20% market share) are the main Milk product producers in Morocco. There also Chergui, Yogo, Jibal, and regional cooperatives



BISCUIT, SWEET & CHOCOLATE INDUSTRY

MEUR	2003	2004	2005
Turnover	80	82	81
Sales	80	82	83
Investment	3	1.4	0.9
Material investment	2.1	1.3	0.6
Production (Tones)	66000	66000	66000
Employed person	1720	1801	1841

Table 1: Biscuit industry facts

MEUR	2003	2004	2005
Turnover	28	33	36
Sales	80	82	83
Investment	6	8	5.5
Material investment	4	6.7	3.5
Production (Tones)	31000	33000	34000
Employed person	475	554	620

Table 2: Sweets industry facts

BISCUIT, SWEET & CHOCOLATE INDUSTRY

- Biscuit sector register an annual growth of 17%, BIMO is a leader company for this sector taking 48% of the market, Kraft food holds 51% of the company the rest belong to ONA group. Morocco importation of biscuits increases from 975 tones in 1997 to 7944 tones in 2005.
- Compagnie Chérifienne de Chocolaterie is a major chocolate company with a capital of 10 MEUR

	2003	2004	2005
Imported Cacao butter (Tones)	379	429	194
Chocolate production(Tones)	1262	1431	647

Table 3: Chocolate production in Morocco

MOROCCAN CANNED VEGETABLES & FRUITS

- Some Facts about canned Fruits & vegetables
 - 2nd largest in the world in canned olives
 - 2nd largest in the world in gherkins
 - 2nd largest supplier of canned apricots to the EU
 - 2nd largest supplier of French beans to the EU
 - 2nd largest exporter of citrus in the world
 - Large-scale production of sugar beets and sugar cane
 - Largest producer and exporter of capers in the world
 - Morocco process 130 000 tones of tomatoes
- Major companies: DOHA, Pikarom, SODEA(government company), lukus, AICHA, FICOPAM

MOROCCAN EXPORTATION OF CANNED FRUIT & VEGETABLES

Product	Qty in 1000T	Value in MUSD
Dried fruits &Vegetables	5	19
Canned vegetables	4	50
Frozen fruits & Vegetables	51	50
Canned gherkins & Capers	15	35
Canned olives	50	81
Spices and herbs	44	65
Cereals & otherGrains	7	4
Fruit & vegetable Juices	6	6.5
Canned fruits	16	19
Vegetable oils,wines/vinegars	15	21

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MOROCCAN FOOD & BEVERAGE PRODUCTS SECTOR WILL GROW AS A RESULT OF THE DEMAND COMING FROM OTHER SECTORS

- Moroccan plan “Rawaj” dedicated to the development of local trade plans by 2020:
 - Construction of 600 big and middle supermarket with 50 hypermarket.
 - Construction of 15 malls.
- Morocco plans to increase the number of tourists to ten millions by 2010, Morocco launched a set of projects to develop the touristic sector (Azur plans). This development will create a demand for food & beverage industry products.



MOROCCO PLAN TO INCREASE VALUE OF ITS AGRICULTURAL PRODUCTS BY CREATING AGRO-INDUSTRY CENTERS

- Morocco green plan set to open industrial food centers around the country.

Agro-Centers

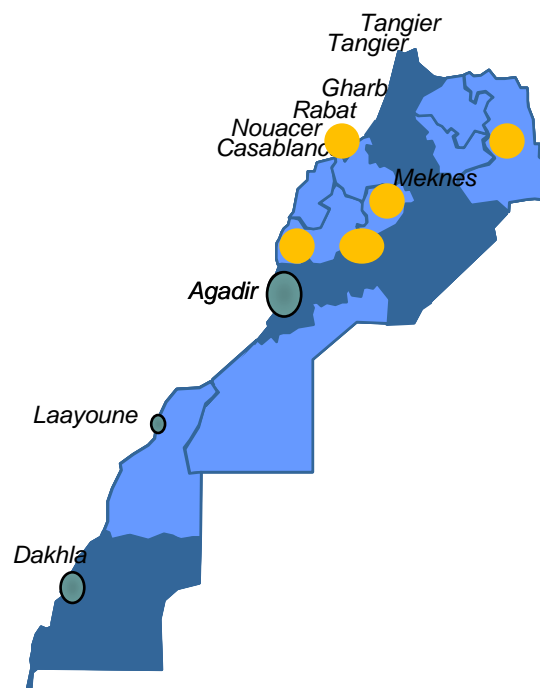


- Oriental
- Meknes-Fes
- Souse Dqraa
- Gharb
- Marrakech

Fishing Transformation Hub

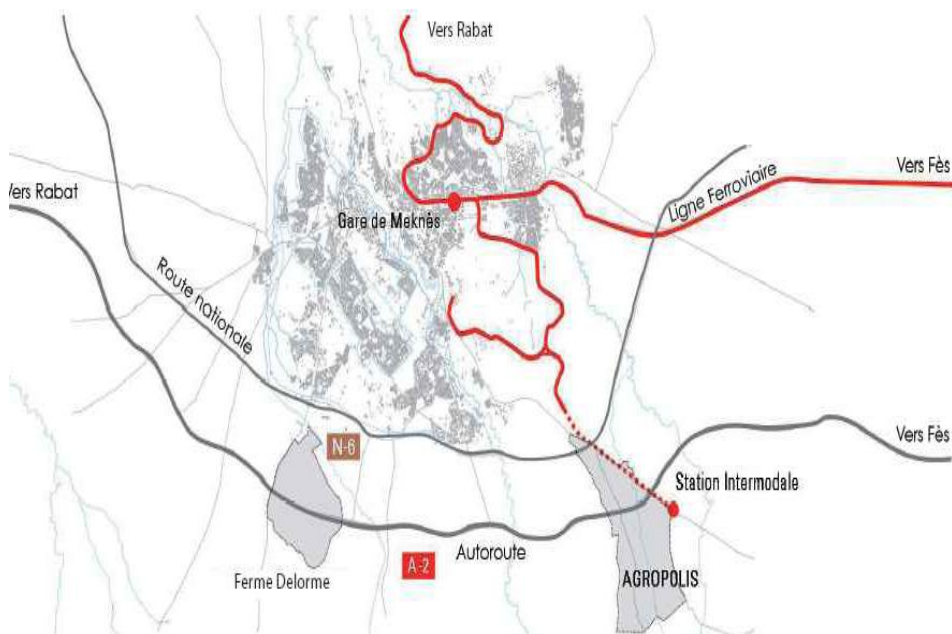


- Agadir
- Laâyoune
- Dakhla



AGROPOLIS IS AN AGRICULTURE CENTER PROJECT DEDICATED TO CREATE VALUE FOR AGRICULTURE PRODUCT

- Agropolis will be situated in the region of Meknes and it is dedicated to create value for agriculture products. The Project cost is 440 MEUR, and it will create 11000 jobs.



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APPENDIX

Sources:

- ✓ International Monetary Fund (IMF)
- ✓ CIA fact book
- ✓ World Bank – Doing Business in Morocco
- ✓ The United Nations Development Programme (UNDP)
- ✓ Moroccan food processing
- ✓ Magazine Telquel
- ✓ Ministère de l'Industrie, du Commerce et de TIC
- ✓ Moroccan American trade
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