

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Morocco

Exporter Guide

2014 Exporter Guide

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Report Highlights:

The exporter guide provides an overview of the political and economic situation in Morocco, as well as the general business and agricultural trade environment. Morocco's economic and political situation continues to be stable. U.S. agricultural best prospects include dairy (milk powder, whey, cheese, butter), soybean complex (whole, oil, meal), distillers grains (DDGS), dried fruits and nuts (almonds, walnuts, non-pitted prunes, raisins), and frozen seafood.

Post:
Rabat

SECTION I: MARKET OVERVIEW

Current Political and Economic Situation

Morocco's general economic and political environment is stable as confirmed by recognized international rating agencies. In July 2011, Morocco continued its democratization and political reform process that started with the change of its constitution. In November 25, 2011, the country had the first parliamentary elections that gave the elected government some of the authorities that were previously reserved for the ruling monarch King Mohamed VI. As a result of the elections, the moderate Islamist party Justice and Development Party (PJD) won 107 of 395 parliament seats and has been given a mandate from the king to form the new government. The Prime Minister Abdelilah Benkiran was elected from the leading party PJD. The new government has thus far failed to deliver on Benkiran's election pledges. With mounting citizens' dissatisfaction and unrest, a government reshuffle is becoming imminent beginning 2013.

On December 5, 2012, Morocco and the United States signed an agreement to facilitate and enhance trade exchanges. The agreement calls for new transparency standards within the two countries to facilitate export procedures for both small and big enterprises. This agreement enforces Morocco-US FTA's implemented since January 1, 2006. The FTA allowed the United States to recapture a significant market share in many traditionally traded commodities and for the first time to export many other commodities that 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 reached \$441 million in 2013, which represented about 34 percent decline compared to 2012, while the U.S. agricultural and food product imports from Morocco for that year were estimated at \$128.5 million.

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

Product	2011	2012	2013	Jan - Aug 2013	Jan - Aug 2014	P/P % Change
Intermediate Total	642,113	465,863	211,230	167,527	145,574	-13
Bulk Total	220,905	115,226	97,098	72,997	79,178	8
Consumer Oriented Total	67,085	84,614	130,617	78,798	105,596	34
Forest Products	2,065	2,664	2,409	1,900	2,168	14
Agricultural Products	930,103	665,703	438,945	319,322	330,348	3
Ag, Fish & Forest	932,305	668,786	441,807	321,496	332,730	3

During the period of January-August 2014, U.S. exports declined to \$333 million, which is 3 percent lower compared to exports during the same period in 2013.

Import duties imposed by Morocco are generally high. However, the U.S. Morocco Free Trade Agreement (FTA) entered its eighth year of implementation on January 1, 2014, with further duty reductions for most U.S. agricultural products. These staged reductions should provide U.S. exporters with greater opportunities to export their products to this market.

The agricultural sector represents a significant share of Morocco's GDP, at between 13 and 21 percent annually. At the same time, agricultural output fluctuates heavily from year to year as it depends a great deal on rainfall and climate conditions as only 16 percent of total arable land is irrigated. In the past, growth has varied from 11 percent to minus 1 percent largely because of the lack of rainfall. Morocco's rainfall during the 2013/2014 season dropped by 27 percent compared to a normal season and by 39 percent compared to 2012/2013 season. Morocco's cereal production for 2013/2014 totaled 6.8 million MT, which represents a 28 percent decrease compared to 2012/2013.

Morocco's soft wheat production for 2013/2014 season totaled 3.7 million MT, 28.8 percent lower than the previous season, while durum wheat production totaled 1.4 million MT, 26.3 percent lower than the previous crop.

In April 2008, the Ministry of Agriculture announced its new strategy for agricultural development in Morocco. In its sixth year of implementation, the strategy has been successful in increasing the overall agriculture production level by 38 percent. The "Green Morocco Plan" strategy calls for reform of water policy, food standards, marketing, and other areas and has two main components:

Pillar I

- Accelerate the development of agriculture value added by fostering investment, by providing preferential access to land and finance and facilitating logistics, branding, quality management and research and development.

Pillar II

- Based on solidarity, Pillar II 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.

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 do not want to take this risk.

Morocco's foreign exchange reserve has been rapidly depleted this year, due to huge import bills and reduced revenue sources. In October 2012, Morocco's foreign reserve had sufficient funds to cover only 4 months of the country's imports, compared to the normal level of covering seven months of imports.

In its strategy to overcome liquidity shortage and boost economic growth, Morocco intends to introduce Islamic banking starting 2013. The government has already detailed how it intends to develop Islamic finance and the Moroccan bank AttijariWafa is most likely to take the lead. Foreign Islamic banks will be allowed 49 percent of Morocco's first fully-fledged Islamic bank, compared to 51 percent for local bank.

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) MO1111 at <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>
- For export certificates required by Morocco please refer to MO1210 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 2012, Ramadan started mid-July.

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 \$131 million in 2013 compared to \$85 million registered in 2012. Between January and August 2014, U.S. consumer product exports increased to \$106 million, which is 34 percent higher, compared to the same period in 2013. 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 above 50 large supermarkets, of which 29 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 2013, Morocco received over 10 million visitors, mostly tourists from Europe but also from the United States, and about 4.4 million Moroccans living overseas. 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 4 million expatriate based in Europe boosts consumption significantly, especially in the tourism sector.

Although there are over 839 graded hotels in Morocco, the potential market for U.S. consumer-oriented products consists essentially of more than 60 upscale hotels (5 stars) concentrated mostly in Agadir, Marrakech, Casablanca, Rabat, and Fes, about 38 tourist villages and clubs, and over 149 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.

Categorized Moroccan, Asian, Western-style and other specialty restaurants, in Morocco are estimated to about 409 units. Restaurants categorization is mandatory as stipulated by the law 61-00 that regulates touristic establishment status. These restaurants 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 \$453 million in 2013, 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, Burger King, 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 62%, Whey 17.5%, and Cheese 57.5%. Significant tariff cuts for U.S. cheese. Whey from U.S. is duty free. Exports from the U.S. soared in 2013 to over \$117 million.

Fresh Apples and Pears: In 2012, Provision for 2,531 MT duty free quotas under U.S. Morocco FTA. Quota opens Feb.1-May 31. First Come – First Serve

Dry Fruits and Nuts: In 2013, Morocco imported \$11 million of nuts from the U.S.. Morocco's nuts import is affected by the smuggling activities and real import are believed to be significantly higher. Common imports duties are ranging from 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. 63.3 tons plus duty free almonds quota.

Beef: In 2011, Morocco frozen beef import totaled 11,000 MT which is two time higher compared to 2010. Morocco's imports in 2010 consisted of 1,612 MT hamburger patties and about 4,000 MT 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 2011 are estimated at 2,500 MT of de-boned, frozen, turkey meat from Europe (Belgium). Tariff rate of imports is 124 % ad valorem. U.S. has a quota of 5,200 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.

Preserved Fruits and Vegetables: Morocco's imports in 2011 soared to 50,000 MT from 43,000 MT in the previous year. Average imports tariff rate is estimated at 50%.

Pulses Eston type lentils, white kidney beans, broad beans, peas demand increase during the month of Ramadan and the winter time. The market size is estimated at 80,000MT. Morocco pulses imports declined significantly from 35,000 MT in 2005 to 7,300 MT in 2011, mainly due to the smuggling. Import duties are 50%.

Honey Peak demand during Ramadan. The market size is about 5,729 MT of which 4,000 MT produced locally and 1,729 MT imported in 2011. Average import tariff rate is about 50%.

Sauces and Condiments including for HRI. The market size is about 5,900 MT. Morocco's imports are estimated at 2,807 MT in 2011. 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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Local Address: 2, Avenue Ahmed El Fassi, Rabat, Morocco

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

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

Local Contacts:

**Ministère de l'Agriculture et de la Pêche Maritime
Direction General de l'Office National la Sécurité Sanitaire des Produits
Alimentaires (ONSSA)**

Avenue Haj Ahmed Cherkaoui- Agdal-Rabat- Morocco

Phone: (212-53) 768-1351/ (212-67) 539-9451

Fax : (212-53) 768-20 49

Link to ONSSA's contact list:

http://www.onssa.gov.ma/onssa/fr/doc_pdf/page_de_contact.pdf

Direction du Contrôle de la Qualité (DCQ) - Port Casablanca

Port de Commerce de Casablanca, Morocco

Phone: (212-52) 231-7047 Fax: (212-52) 231-8648

Email: dcqpf@hotmail.com

Port Food and Agricultural Products Inspection, Ministry of Agriculture.

**Ministère de l'Agriculture et de la Pêche Maritime
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Holiday Inn Crown Plaza

Phone:(212-52) 229-4949/229-3434
Fax:(212-52) 229-3029/229-3035
Avenue Hassan II, Casablanca, Morocco

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: 2015 Holidays Schedules

DATE	HOLIDAY
January 1	NEW YEAR'S DAY
January 4 & 5*	AID MAWLID AN NABBAOUI (to celebrate the birthday of prophet Mohammed)
January 19	MARTIN LUTHER KING'S BIRTHDAY
February 16	PRESIDENT'S DAY
May 1	MOROCCAN LABOR DAY
May 25	MEMORIAL DAY
July 3	AMERICAN INDEPENDENCE DAY
July 18 & 19*	AID AL FITR (Celebration of end of Ramadan)
July 30	FEAST OF THE THRONE (to celebrate King's Mohammed VI ascension to the throne)

August 20	THE REVOLUTION OF THE KING AND THE PEOPLE
August 21	YOUTH DAY (to celebrate King's Mohammed VI birthday)
September 7	AMERICAN LABOR DAY
September 24 & 25*	AID AL ADHA (Muslims' feast of sacrifice)
October 12	COLUMBUS DAY
October 16*	FIRST MOHARRAM (Muslims' New Year)
November 11	VETERAN'S DAY
November 18	FEAST OF INDEPENDENCE (to celebrate Morocco's independence in 1956)
November 26	THANKSGIVING DAY
December 25	CHRISTMAS DAY

(*) A lunar-based Moroccan holiday; the actual date may vary..

Table A: Key Trade & Demographic Information

Agricultural Imports From All Countries (\$Mil.) / U.S. Market Share (%)	5598	17.7
Consumer Food Imports From All Countries (\$Mil.)/US Market Share(%)	775	10
Edible Fishery Imports From All Countries (\$Mil.)/US Market Share (%)	141	<1
Total Population (Millions) / Annual Growth Rate (%)	34	1.06
Urban Population (Millions) / Annual Growth Rate (%)	19	2.1
Active Population (Million)/ Urban (%)	11.6/ 53	
Number of Major Metropolitan Areas (a)	11	
Size of the Middle Class (b) (Millions) / Growth Rate (%) (b)	10	2.0
Per Capita Gross Domestic Products (\$U.S.)	\$2,925	
Unemployment Rate (%)	8.9	
Per Capita Food Expenditures (\$U.S.) (C)	\$1,400	
Percent of Female Population Employed	25.5	
Indicative Exchange Rate (US \$1 is :)	8.08 dirham's	

(a) Population in Excess of 500,000 / (b) Estimated Population than can regularly purchase imported food products.

(c) Estimates based on average population food share of 0.478; this ratio is different for the moderate poor (0.578) and the extreme poor (0.645)
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-2010-2011 in \$ million

Calendar Year	Total Morocco Imports		Imports from USA	
	2010	2011	2010	2011
Total High Value Products	590	775	76	75
Milk Powder	26	20	0	1
Butter	94	130	17	20
Tea	110	173	0	0
Coffee	66	95	0	0
Frozen Beef	22	58	0	0
Frozen Poultry	2	2	0	0
Whisky/Vodka	29	34	1	1
Chocolate	21	22	0	0
Wine	13	14	0	0
Cheeses	54	56	8	13
Spices Flavoring	4	7	0	0
Banana	12	11	0	0
Pastry & Biscut	17	17	0	0
Jams, Jellies	4	4	0	0
Fruit, Nut, Prep	6	8	0	0
Vegetables Prep	10	14	0	0
Water & Soft Drinks	11	13	0	0
Whey, Natural Milk	57	68	45	31
Tomatoes Prepared	20	10	1	0

Fresh Apples	11	12	1	0
Dried or fresh Raisins	4	9	0	0
Ice Cream	4	4	0	0
Nuts	7	11	5	9
Sauces Seasonings	7	9	0	0
Pet Food	3	3	0	0
Orange Juice Frozen	9	14	0	0
Total Seafood	107.8	140.8	0	0
Crustaceans	69.1	90.2	0	0
Fish, Cured, Smoked	12.2	10.6	0	0
Fish Fillets, Meat	8.3	9.9	0	0
Mollusks	7.5	12	0	0
Fish, Frozen, Whole	5.3	10.4	0	0
Fish, Whole Fr/Ch	4.8	7.1	0	0
Live Fish	0.5	0.6	0	0
Agricultural Products Total	4,121	5,598	830	991
Agr., Fish, Forestry Total	4,614	6,163	831	995

Note: Indicative Exchange Rate (\$/dh) 2010:8.45/ 2011:8.08

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 Import by Country of Origin				Seafood Imports by Country of Origin			
COUNTRY	2009	2010	2011	COUNTRY	2009	2010	2011
Total Imports	508	590	775	Total Imports	69.4	107.8	140.8
France	139.7	85.2	134.5	Netherlands	18.0	46.1	66.2
United States	70.0	76.0	75.0	Spain	11.6	5.7	11.9
Brazil	26.6	37.1	67.0	China	3.3	9.2	10.9
Argentina	67.8	28.7	61.1	Belgium	5.0	5.7	7.8
Canada	37.6	68.5	47.3	Argentina	4.6	11.0	7.6
China	16.6	32.5	42.2	Denmark	4.9	6.4	6.8
Netherlands	13.6	20.8	31.1	Norway	3.9	5.0	6.4
Germany	21.1	14.8	27.8	Vietnam	0.9	2.4	4.0
Spain	13.9	18.0	22.4	Thailand	0.9	1.9	2.6
Tunisia	7.8	11.6	17.6	Canada	1.6	1.0	2.3
New Zealand	6.1	8.6	15.7	Ecuador	0.2	2.5	1.7
Egypt	3.0	12.8	11.2	France	0.8	0.8	1.5
United Kingdom	6.6	7.1	10.0	Senegal	1.8	0.3	1.4
Australia	2.3	9.0	9.7	United Kingdom	0.6	0.5	1.3
Paraguay	4.3	10.3	8.4	Ivory Cost	0.0	0.6	1.3

Belgium	3.8	7.0	7.1	United Arab Emirates	1.0	1.5	1.2
Ukraine	3.0	18.7	5.8				
Italy	2.7	4.0	5.7				
Vietnam	3.0	5.8	5.2				
Indonesia	2.6	4.6	5.1				
Sweden	8.8	1.1	4.4				
Denmark	3.9	3.0	4.1				
Poland	1.4	2.2	3.9				
Others Suppliers	41.9	102.5	152.7				

Source: Moroccan Customs Data (Office des Changes)