

# **Fruit & Vegetables market Morocco**

*Presentation by:*

*MEYS Emerging Markets Research*

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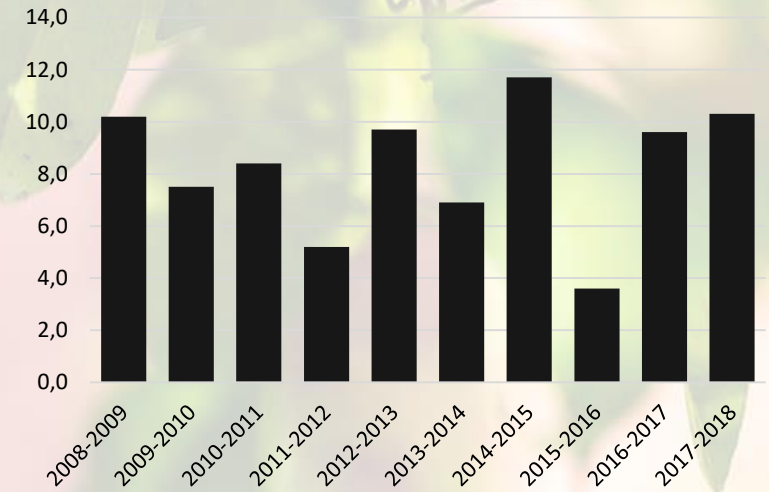
# Country profile Morocco

- 14 km of Spain
- Constitutional monarchy since 1956
- Capital Rabat (0.6 million people)
- Casablanca (3.3 million people) economic centre
- Political stable country
- Parliamentary elections every 4 years
- Head of State is King Mohammed VI (since 1999)
- 35 million people
- 54% is younger than 30 years
- 60% of the population live in urban areas
- Strong economic growth rate (average > 4% p.a. during last 10 years)
- Relatively low inflation rate (< 2% p.a. during last 10 years)
- Sixth largest economy of Africa
- Top destination in Africa for FDI
- Diversified economy

# Main trends and developments in Morocco's agricultural sector

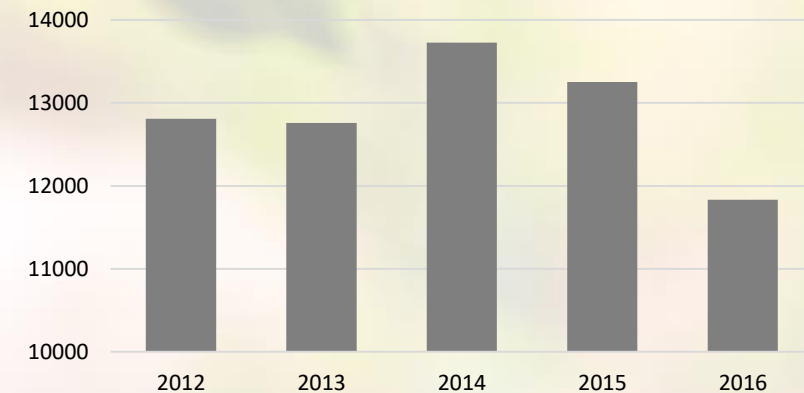
- Agriculture contribute 14% to GDP
- 7.6 million ha. cultivated of which 1.4 million ha. irrigated
- Provides employment to 39% of the total active labour force
- Cereals (wheat, barley) main agricultural product (10 million tons annually)
- Annual export value agricultural products around 2 billion euros
- Main agricultural exports are green beans, potatoes, tomatoes and citrus
- Annual average production fruits and vegetables between 12 – 13 million tons, depending on rainfall

Cereal production (million tons)



Source: Ministry of Agriculture

Production Fruits and Vegetables Morocco (1000 tons)



Source: FAO

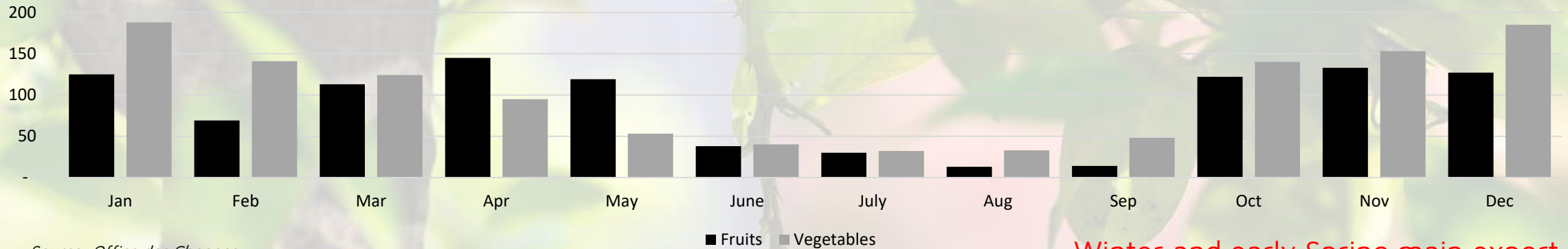


# Fruits and Vegetables market in Morocco

- Fruits and vegetables sector occupies more than 700,000 ha.
- 260,000 ha. vegetable production, 450,000 ha. fruit production
- Annual production in 2016 amounts to around 11.8 million tons with 4.9 million tons of fruits (42%) and 6.9 million tons of vegetables (58%)
- Annual export volume of fruits and vegetables is around 1.85 million tons, of which 35% fruits and 65% vegetables
- On average 15% of total production is exported

Main products	Production, 2016 (million tons)	Exports , 2016 (thousands tons)	% total exports 2016
Red fruit	0.14	29	1.6
Citrus	2.04	567	30.7
Apples	0.41	0,19	0.0
Melons	0.52	40	2.2
Other fruits	1.79	226	12.2
Tomatoes	1.23	525	28.4
Potatoes	1.74	46	2.5
Olives	1.42	0,044	0.0
Other vegetables	2.51	416	22.4
<b>Total</b>	<b>11.83</b>	<b>1.847</b>	<b>100.0</b>

Morocco Fruits & Vegetables Exports, 2017 (1000 tons)



Source: Office des Changes

Winter and early Spring main export period Morocco

Production calendar Moroccan Fruits and Vegetables

PRODUITS	MOIS											
	SEPT.	OCT.	NOV.	DÉC.	JANV.	FÉVR.	MARS.	AVR.	MAI.	JUIN.	JUIL.	AOÛT.
<b>LÉGUMES</b>												
TOMATE		🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅		
POMME DE TERRE			🥔	🥔	🥔	🥔	🥔	🥔	🥔			
HARICOT VERT		🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿
POIVRON		🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️			
COURGETTE		🥒	🥒	🥒	🥒	🥒	🥒	🥒	🥒	🥒		
PETITS POIS		🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿
PIMENT FORT		🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️			
POIS MANGETOUT		🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿			
MAÏS DOUX					🌽	🌽	🌽	🌽				
<b>FRUITS</b>												
MELON		🍈	🍈	🍈	🍈	🍈	🍈	🍈	🍈	🍈		
FRAÏSE					🍓	🍓	🍓	🍓	🍓	🍓		
PÊCHE							🍑	🍑	🍑	🍑		
RAISIN								🍇	🍇	🍇	🍇	
NECTARINE								🍑	🍑	🍑	🍑	
PASTHÈQUE						🍈	🍈	🍈	🍈	🍈		

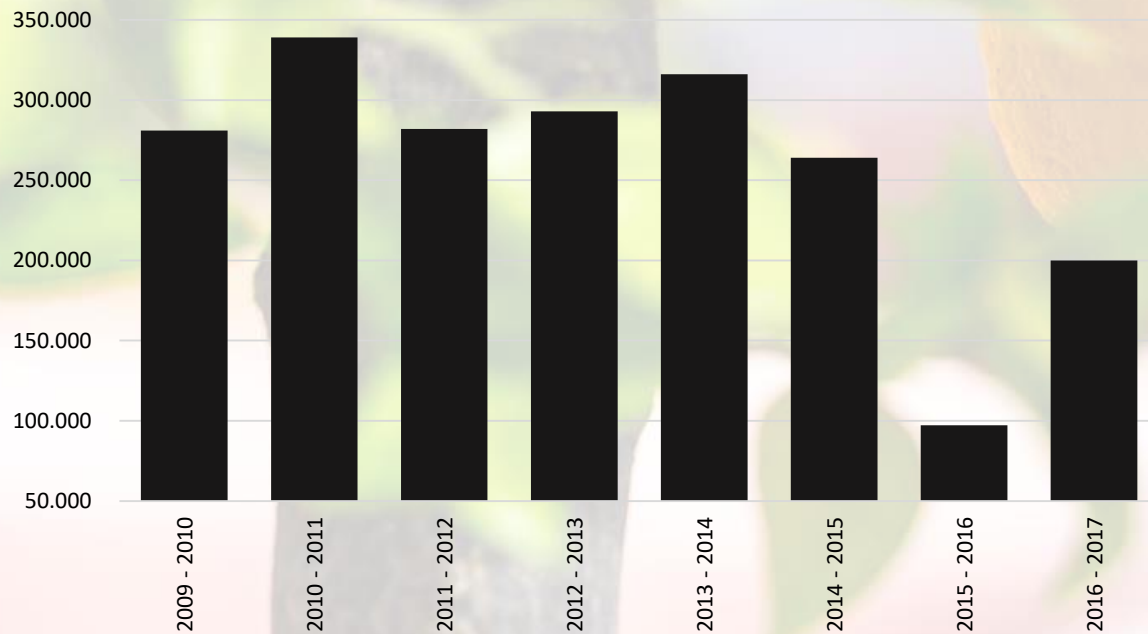
Export calendar Moroccan Fruits and Vegetables

VEGETABLES	Months											
	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG
TOMATO		🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅			
TOMATO CERISE	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅	🍅
POTATO				🥔	🥔	🥔	🥔	🥔	🥔	🥔		
BEANS	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿	🌿
PEPPER		🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️			
CHILI PEPPER		🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️	🌶️			
ZUCCHINI		🥒	🥒	🥒	🥒	🥒	🥒	🥒	🥒			
CORN		🌽	🌽				🌽	🌽	🌽			
<b>FRUITS</b>												
MELON						🍈	🍈	🍈	🍈	🍈	🍈	
PEACH							🍑	🍑	🍑	🍑		
NECTARINE								🍑	🍑			
GRAPES								🍇	🍇	🍇	🍇	🍇
WATERMELON								🍉	🍉	🍉	🍉	🍉
STRAWBERRY			🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓
RASPBERRY	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓	🍓
BLUEBERRY		🍇	🍇	🍇	🍇	🍇	🍇	🍇	🍇	🍇	🍇	🍇

# Market of fresh vegetables (pulses) in Morocco

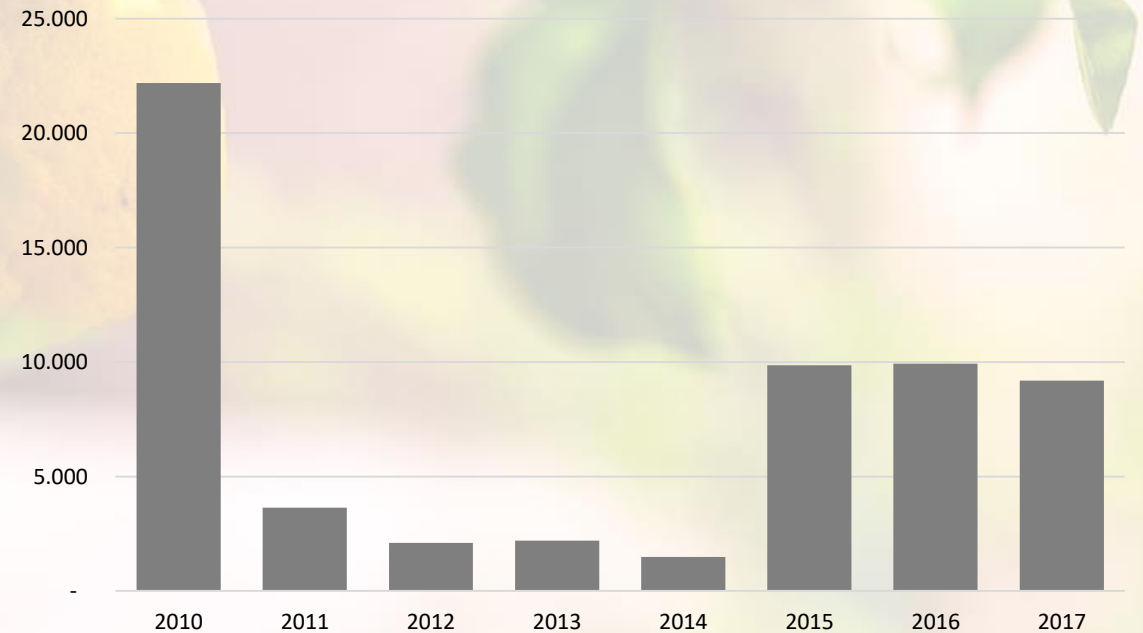
- Main fresh vegetables (pulses) are green beans and peas
- Cultivated area is around 210,000 ha.
- Annual production is on average between 250,000 – 300,000 tons
- Between 2 – 4% of total vegetable production is exported

Production vegetables (tons)



Source: Ministry of Agriculture

Exports fresh vegetables (tons)



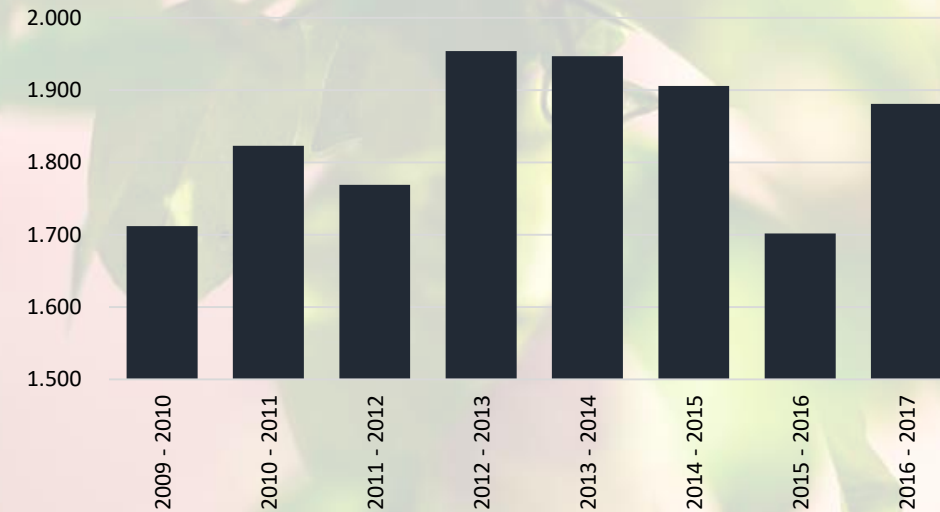
Source: Office des Changes



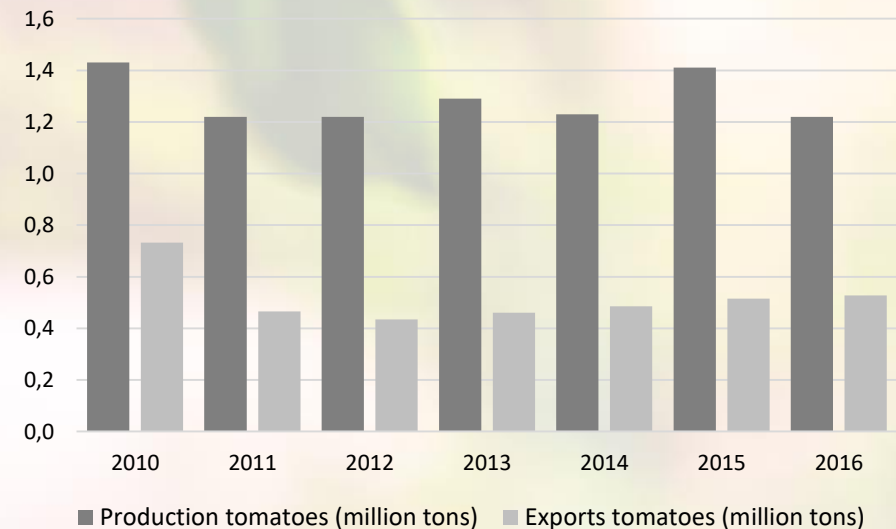
# Primary vegetables (tomatoes, potatoes, onions)

- Annual production of potatoes between 1.8 – 1.9 million tons
- Cultivated area of potatoes 59,000 ha.
- Export volume of potatoes is around 2% of domestic production
- Annual production of tomatoes between 1.2 – 1.4 million tons
- Cultivated area of tomatoes 15,000 ha.
- Around 45% of tomato production exported: Morocco top exporter of tomatoes to EU (export value around 0.5 billion euros)
- Three types of tomato production:
  - Early tomatoes (80% of total production): for export markets produced in the regions Souss-Massa, Doukkala-Abda; for domestic market produced in the regions Moulouya, Temara-Skhirat, and Casablanca
  - Seasonal tomatoes (18%): for domestic market produced in the regions along the Atlantic coast from Safi to Temara-Skhirat
  - Industrial tomatoes (2%): for food processing and produced in the regions of Meknes, Marrakech and Beni Mellal

Production of potatoes (1000 tons)



Source: Ministry of Agriculture



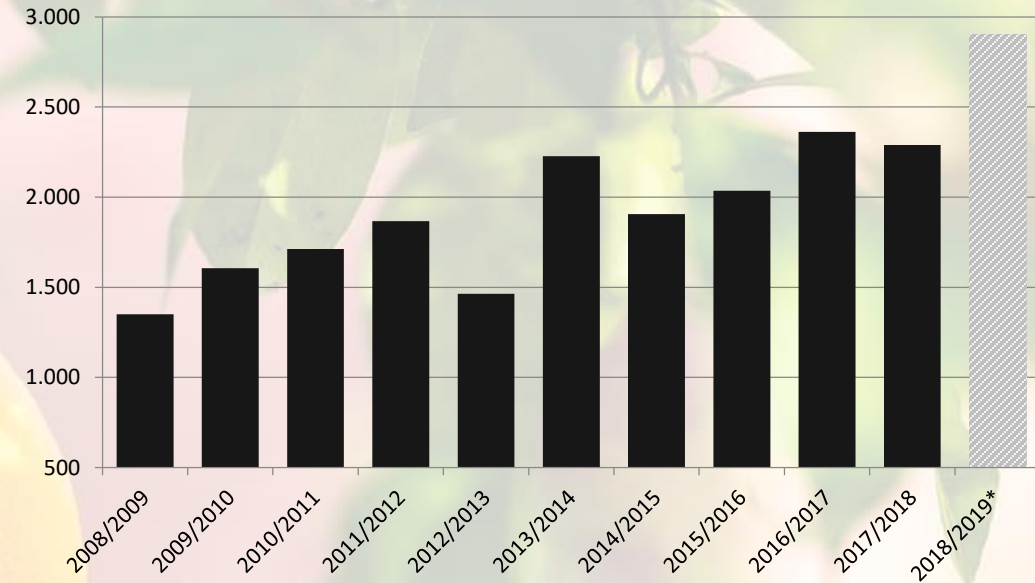
Source: FAO, Office des Changes



# Profile citrus industry Morocco

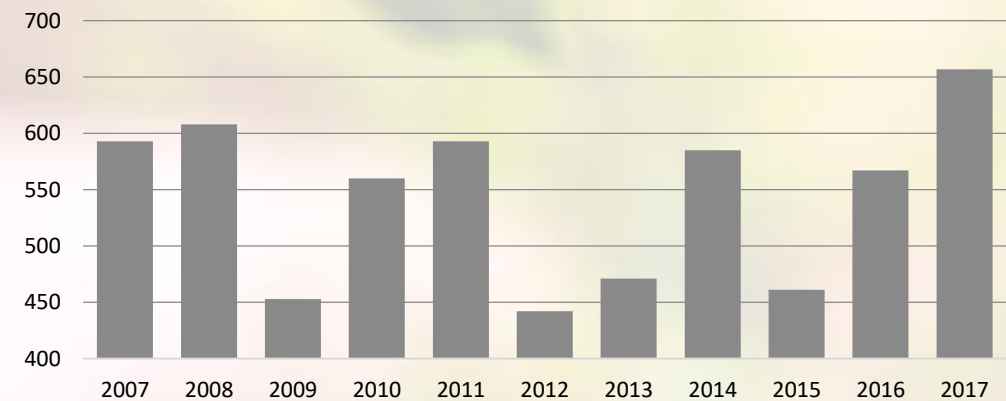
- 125,000 ha. of citrus production
- 13,000 citrus producers
- 90,000 permanent jobs
- Citrus production by region:
  - Souss-Massa: 32%
  - Gharb: 20%
  - Oriental: 16%
  - Tadla: 13%
  - Haouz: 14%
  - Loukkos: 1%
  - Other regions: 4%
- Citrus season in Morocco runs from around mid-October until June
- Citrus production increased strongly since 2009
- Citrus production: 65% sold directly on the market; 5% for industrial processing; 30% for direct exports

Production citrus Morocco  
(x 1000 ton)



Note: (\*) target Ministry of Agriculture

Exports of citrus (1000 tons)



Source: Ministry of Agriculture

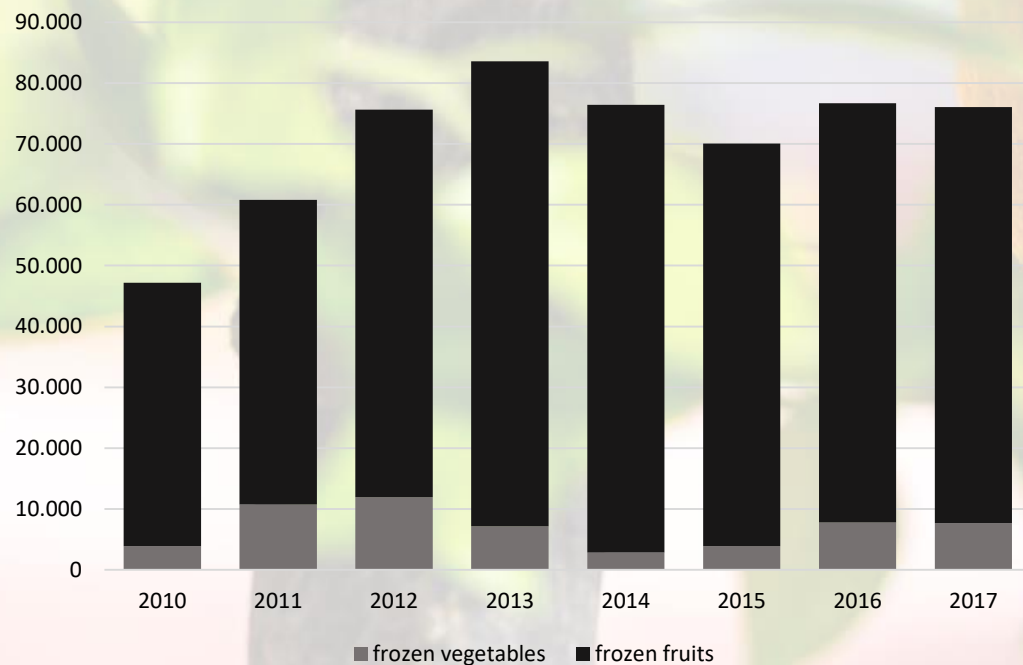
# Red Fruit

- Strawberry production 140,000 tons annually
- Cultivated area 3,300 ha., 600 farms
- Two-third of strawberry production exported (fresh and frozen), one-third for local consumption
- Raspberry production in Morocco since 2004
- Annual raspberry production around 16,000 tons of which 90% is exported (fresh and frozen)
- Blueberry production in Morocco since 2008
- Annual blueberry production around 17,000 tons of which 95% is exported (fresh and frozen)
- EU market main destination Moroccan red fruit exports (95%)

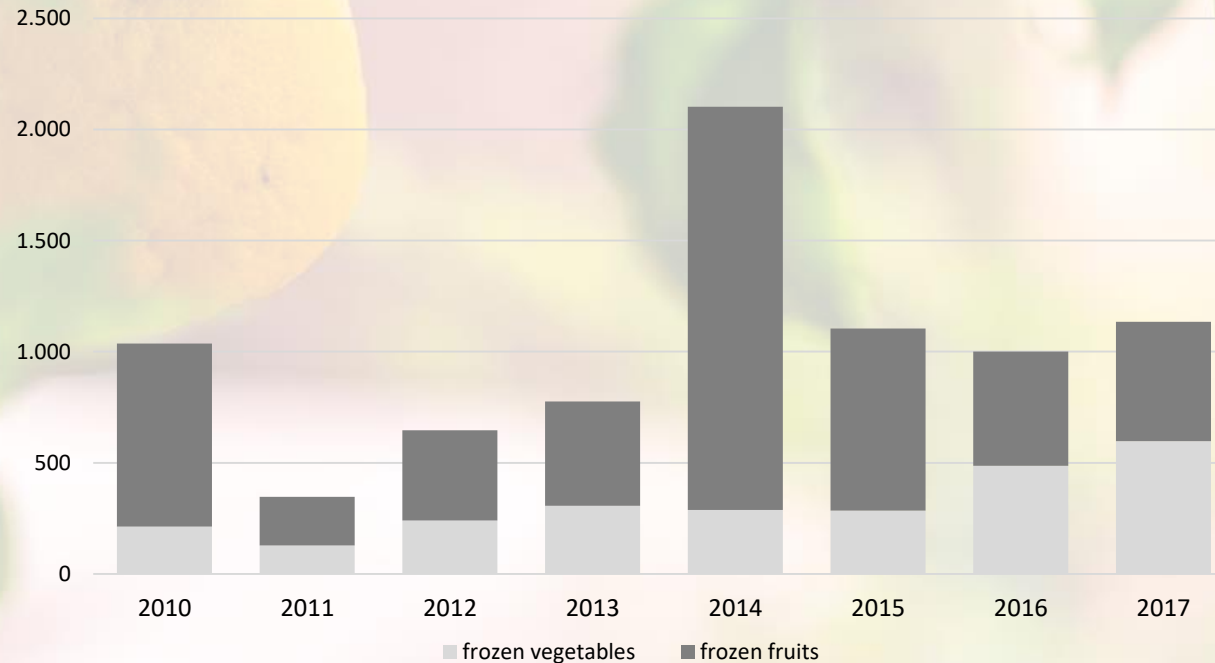
# Frozen Fruit and Vegetables

- Foreign demand for Moroccan frozen agricultural products is around 75,000 – 80,000 tons annually
- Main foreign demand is for Moroccan frozen raspberries and strawberries
- Moroccan imports of frozen fruit and vegetables are limited to around 1,000 tons annually

Moroccan exports frozen fruits and vegetables (tons)



Moroccan imports frozen fruits and vegetables (tons)







**Thank you for your attention**

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