



Fruit & Vegetables market Morocco

Presentation by:

MEYS Emerging Markets Research

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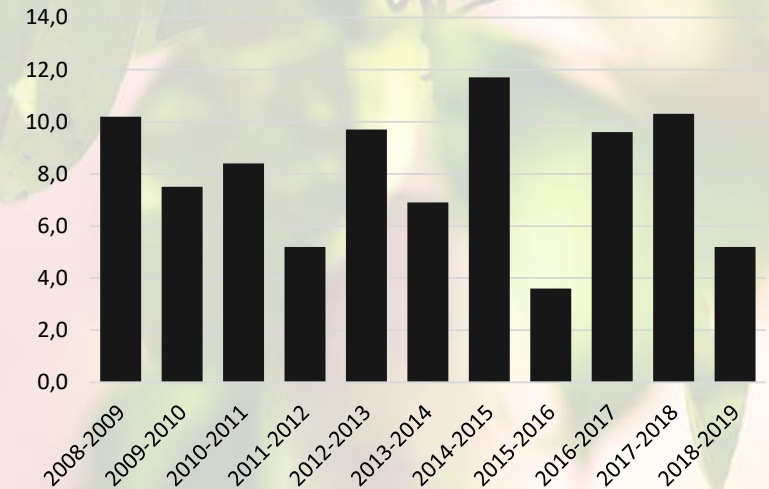
I. Country profile Morocco

- 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

II. Main trends and developments in Morocco's agricultural sector

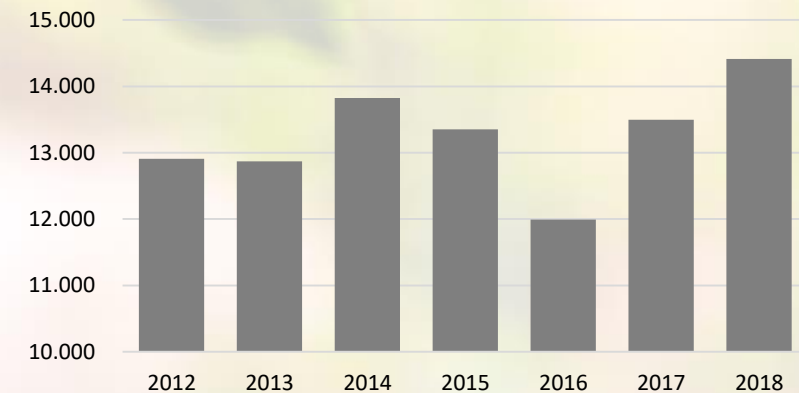
- Agriculture contribute 14% to GDP
- 8.7 million ha. cultivated, of which 19% is irrigated
- About 85% of the cultivated farm plots are smaller than 10 ha.
- Average size of farm plots around 6 ha.
- 750,000 farmers in Morocco
- Almost 11,000 agricultural cooperatives with 355,000 individual members
- Sector provides employment to one-third of the total active labour force
- Cereals (wheat, barley) main agricultural product (average 8 million tons annually since 2008)
- 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 – 15 million tons, depending on rainfall

Cereal production (million tons)



Source: Ministry of Agriculture

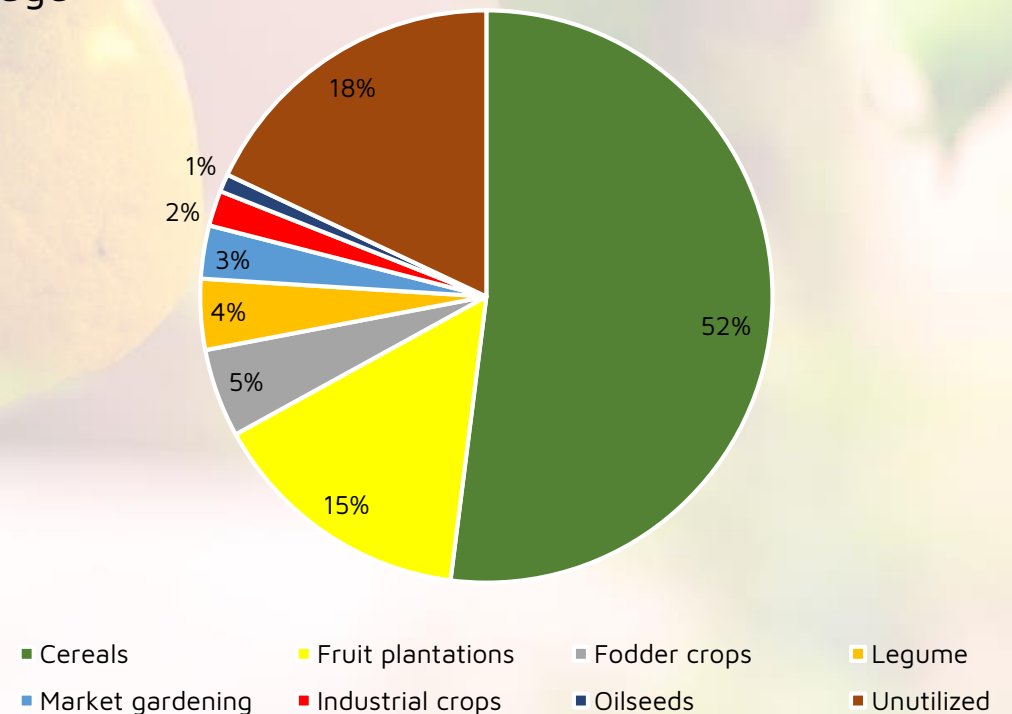
Production Fruit and Vegetables Morocco (1000 tons)



Source: FAO

- More than half of the available land for cultivation in Morocco is dedicated to cereals
- Market gardening and fruit plantations cover together 18 percent of total cultivable land
- Land use in Morocco remains largely conditioned by the climate
- Almost 80% of the national territory is in dry or desert areas, with average annual rainfall < 250 mm
- Less than 10% is found in sub-humid and humid areas with average annual rainfall > 500 mm

Utilization of land (%)



- Covered cultivation (plastic tunnels and houses) in Morocco still relatively limited (approx. 15,000 ha.)
- Canarian greenhouses are currently the most common type used in Morocco, although adapted to local circumstances since the introduction in late 1970s
- Multichapel greenhouses only used by some large exporters
- Plastic houses and tunnels primarily used for tomatoes, bananas, green beans, melons, peppers, red fruit (strawberries, raspberries, blueberries)
- Majority of covered cultivation in the southern region Souss-Massa around the cities of Agadir and Taroudant
- 6 600 ha. of covered tomato cultivation (approx. 900,000 tons) in the region of Souss-Massa
- Hydroponics cultivation in Morocco is at the moment limited to 650 ha. of tomatoes in the Souss-Massa region



Agro-food industry in Morocco

- Around 2 100 companies active
- Providing jobs to almost 150,000 people (25% of total jobs in Morocco's industry)
- Annual turnover 115 billion dirhams (11 billion euros)
- Contributing 11% to Morocco's total export value
- EU main export destination of Morocco's agro-food industry
- For the period 2017 – 2021 investments will be made by public and private sector of 12 billion dirhams aimed at:
 - Creating approximately 40,000 new jobs
 - Opening up 371 new factories
 - Increasing turnover with 42 billion dirhams (3.9 billion euros)
 - Focus on fruit & vegetables, citrus, meat, milk, olive, poultry



III. Fruit and Vegetables market in Morocco

- Fruit and vegetables sector occupies more than 700,000 ha.
- 260,000 ha. vegetable production, 450,000 ha. fruit production
- Annual production in 2018 amounts to around 14.4 million tons, of which 6.1 million tons of fruits (42%) and 8.3 million tons of vegetables (58%)
- Export volume of fruit and vegetables (fresh and frozen) in 2018 2.3 million tons, of which 63% fruit and 37% vegetables
- On average 15% of total production in exported

Agricultural product	Production, 2018 (tons)
Vegetables	
Potatoes	1 869 149
Tomatoes	1 409 437
Olives	1 561 465
Onions	954 801
sub-total Vegetables	8 324 991
Fruit	
Tangerines, mandarines	1 208 789
Melons, watermelons	1 243 198
Oranges	1 019 150
Apples	696 950
sub-total Fruit	6 089 276
Total Fruit & Vegetables	14 414 267

Source: FAO

Agricultural product	Export volumes, 2018 (tons)
Vegetable crops (fresh):	
Tomatoes	568 509
Onions	40 594
Potatoes	9 823
Total vegetable crops	845 174
Citrus fruit (fresh):	
Oranges	148 603
Mandarines, Clementines	558 851
Total citrus fruit	724 068
Red fruit (fresh):	
Strawberries	18 273
Raspberries	23 134
Blueberries	18 234
Total red fruit	59 640
Total fruit and vegetables (fresh and frozen)	2 257 200

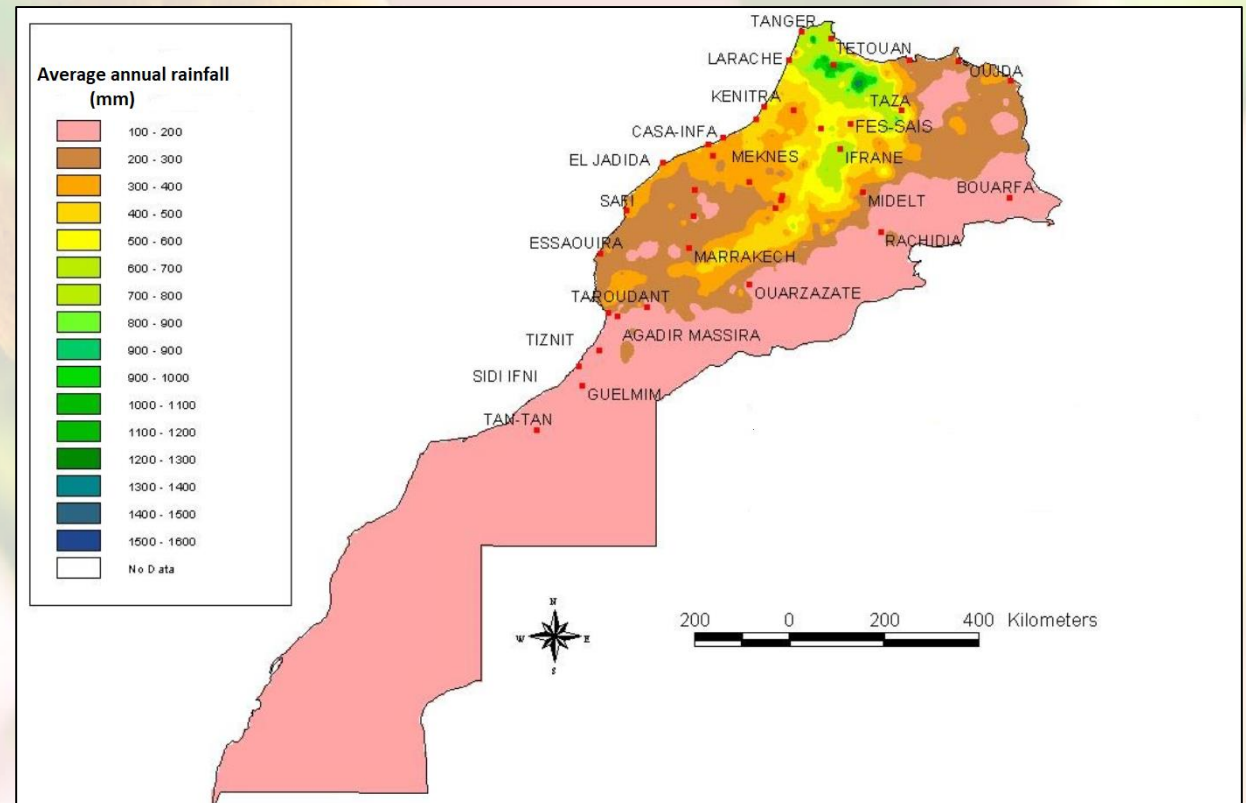
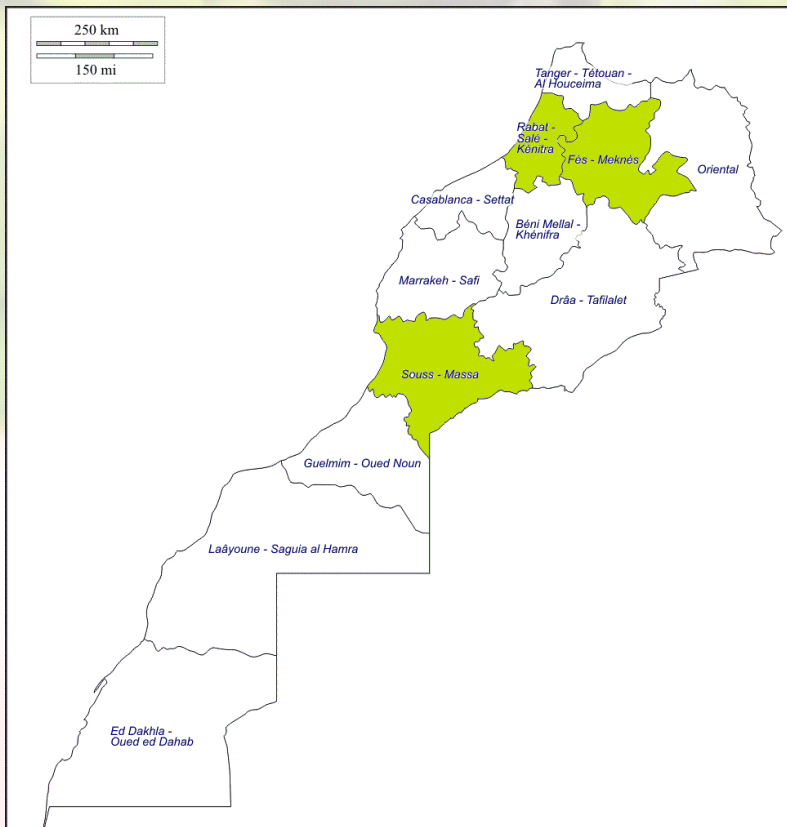
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Source: Office des Changes

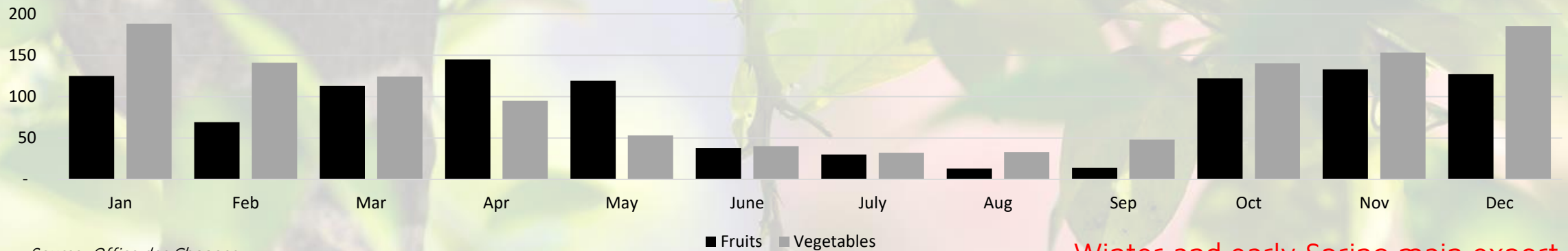
Three main regions for fruit and vegetable production in Morocco are:

- Souss-Massa (main export region in Morocco)
- Rabat-Salé
- Fès-Meknès

} most rainfed areas of Morocco



Morocco Fruit & Vegetables Exports, 2017 (1000 tons)



Source: Office des Changes

Winter and early Spring main export period Morocco

Production calendar Moroccan Fruit and Vegetables

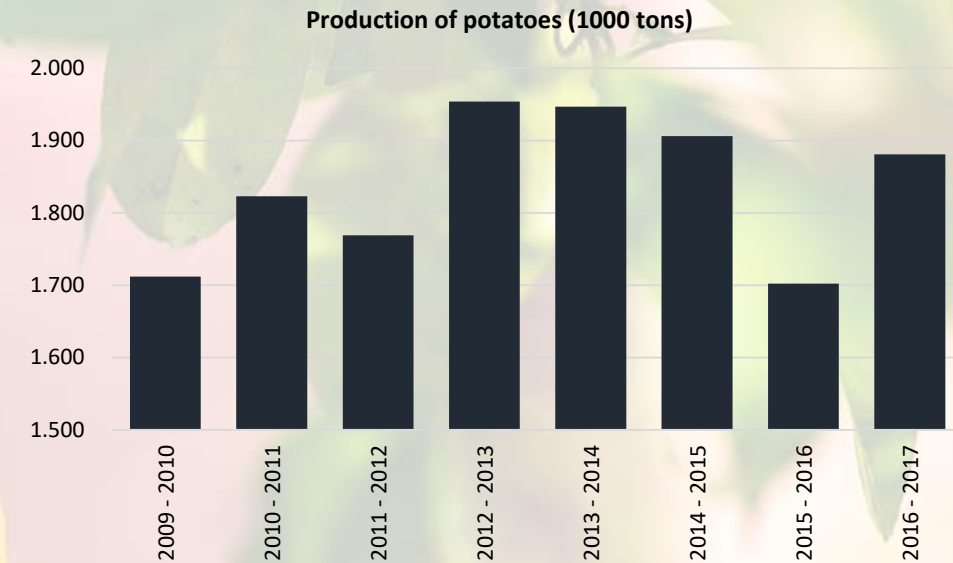
PRODUITS	MOIS											
LÉGUMES	SEPT.	OCT.	NOV.	DÉC.	JANV.	FÉVR.	MARS.	AVR.	MAI.	JUIN.	JUIL.	AOÛT.
TOMATE												
POMME DE TERRE												
HARICOT VERT												
POIVRON												
COURGETTE												
PETITS POIS												
PIMENT FORT												
POIS MANGETOUT												
MAÏS DOUX												
FRUITS	SEPT.	OCT.	NOV.	DÉC.	JANV.	FÉVR.	MARS.	AVR.	MAI.	JUIN.	JUIL.	AOÛT.
MELON												
FRAISE												
PÊCHE												
RAISIN												
NECTARINE												
PASTHÈQUE												

Export calendar Moroccan Fruit 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												
FRUITS	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG
MELON												
PEACH												
NECTARINE												
GRAPES												
WATERMELON												
STRAWBERRY												
RASPBERRY												
BLUEBERRY												

Market of potatoes in Morocco

- Annual production of potatoes between 1.8 – 1.9 million tons
- Cultivated area of potatoes around 59,000 ha., of which 16% for early (primeur) potatoes
- Domestic production consist primarily of potatoes for local consumption
- Main potato varieties: Nicola, Spunta, Desiree, Diamant, Liseta, Mondial, Kondor. Nicola production is almost exclusively for export market, while Desiree and Spunta are the leading varieties on the local market
- Harvesting season potatoes December – July and some production in September – October
- Domestic market for processing potatoes into chips and french fries still very limited
- Export volume of potatoes is around 2% of domestic production

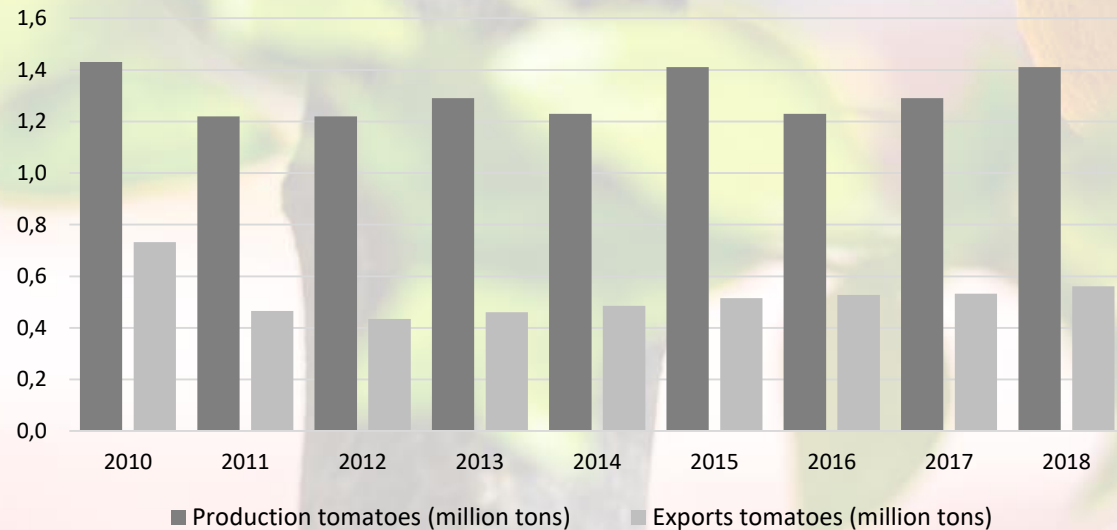


Source: Ministry of Agriculture



Market of tomatoes in Morocco

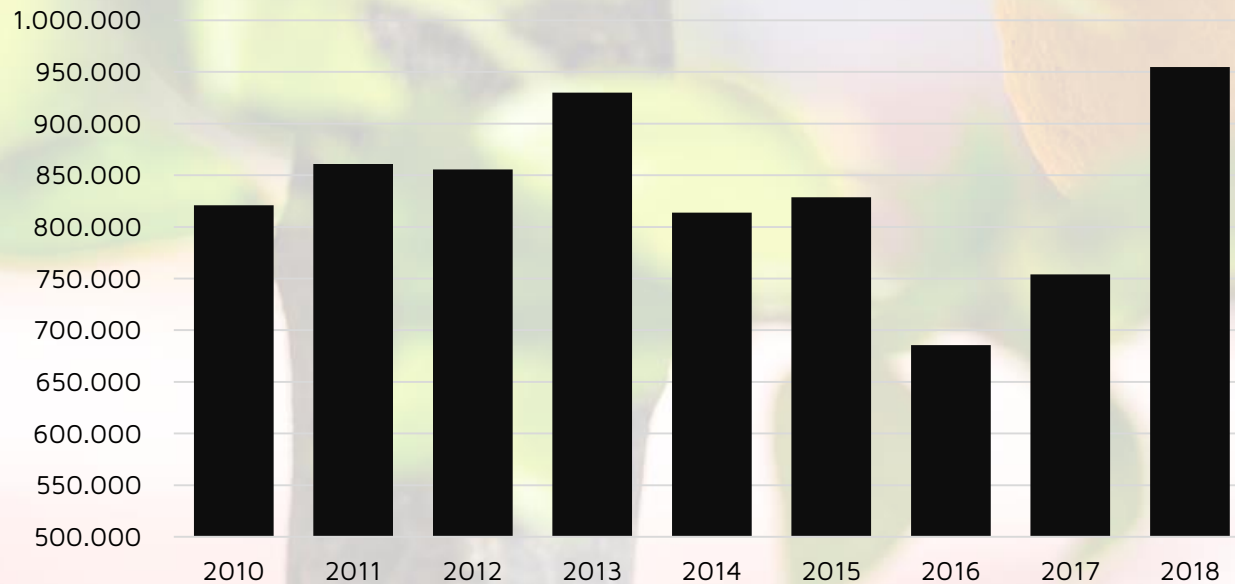
- Annual production of tomatoes between 1.2 – 1.4 million tons
- Cultivated area of tomatoes 15,000 ha.
- Around 45% of tomato production exported: Morocco top exporter of tomatoes to EU (export value around 0.5 billion euros)
- Three types of tomato production:
 - Early tomatoes (80% of total production): 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



Market of onions in Morocco

- Cultivated area around 27,000 ha.
- Annual production between 750,000 – 950,000 tons
- Half of national production is done in the province of El-Hajeb (region Fes-Meknes)
- Exports of onions are < 3% of domestic production
- Imports of onions are insignificant, only when domestic production is below 800,000 tons onions are imported

Production of onions (ton)



Source: FAO

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Exports/Imports fresh onions (tons)



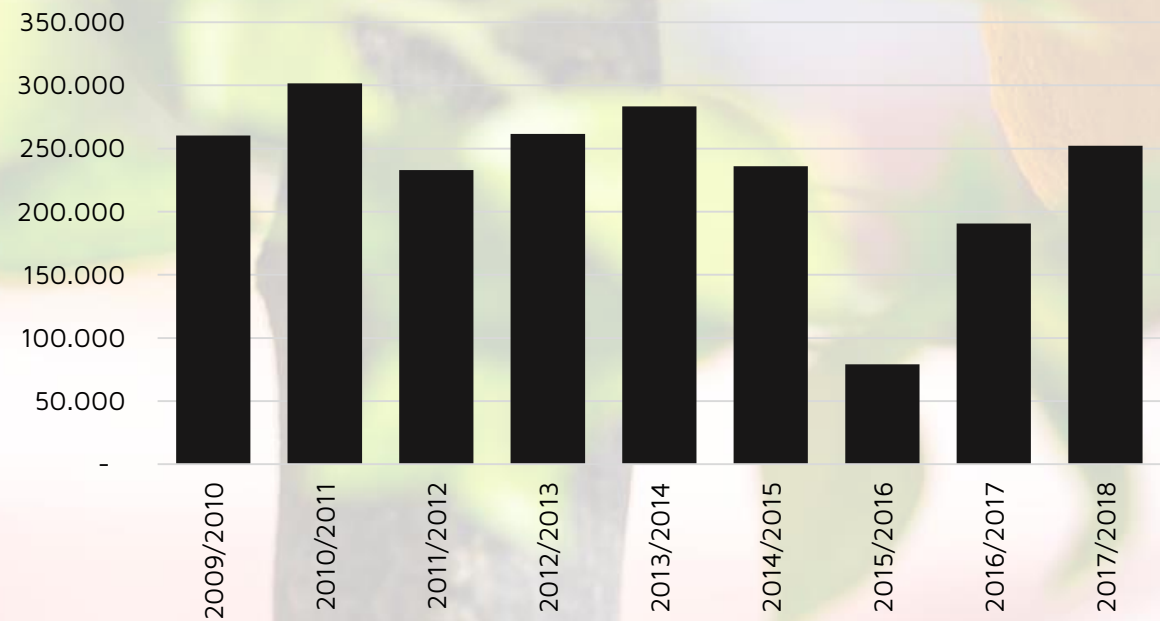
Source: Office des Changes

■ Exports ■ Imports

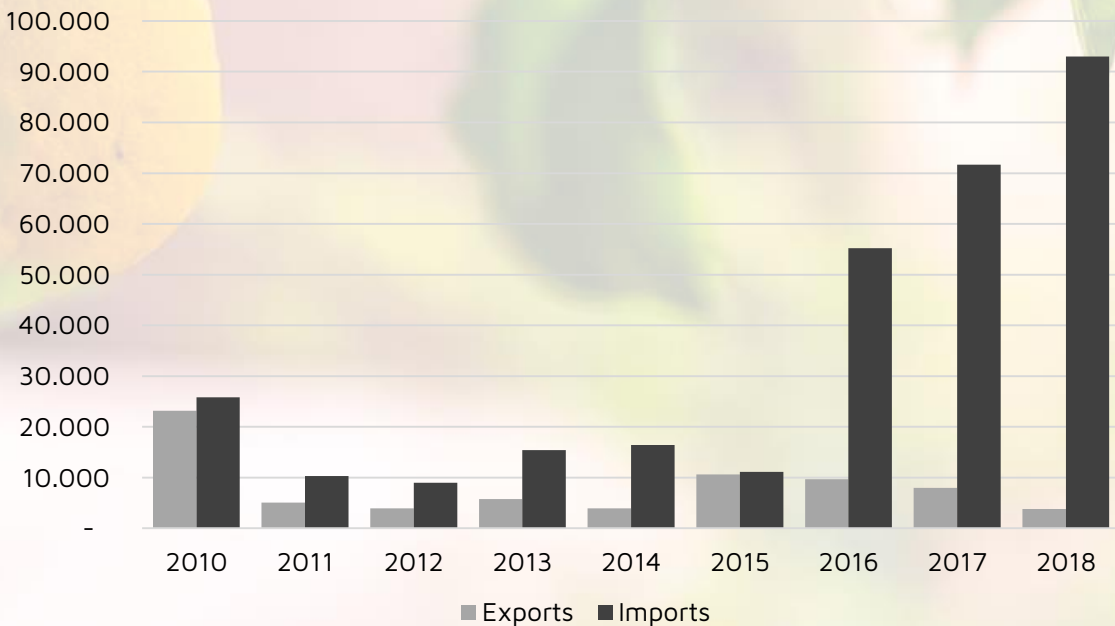
Market of pulses in Morocco

- Main pulses are beans, peas, lentils, and chickpeas
- Cultivated area of pulses since 2010 between 200,000 – 400,000 ha.
- Annual production pulses since 2010 on average between 250,000 – 300,000 tons
- Exports of pulses is limited (< 5%)
- Imports of pulses are 10x higher than exports

Production main pulses* (tons)



Exports/Imports of pulses (tons)

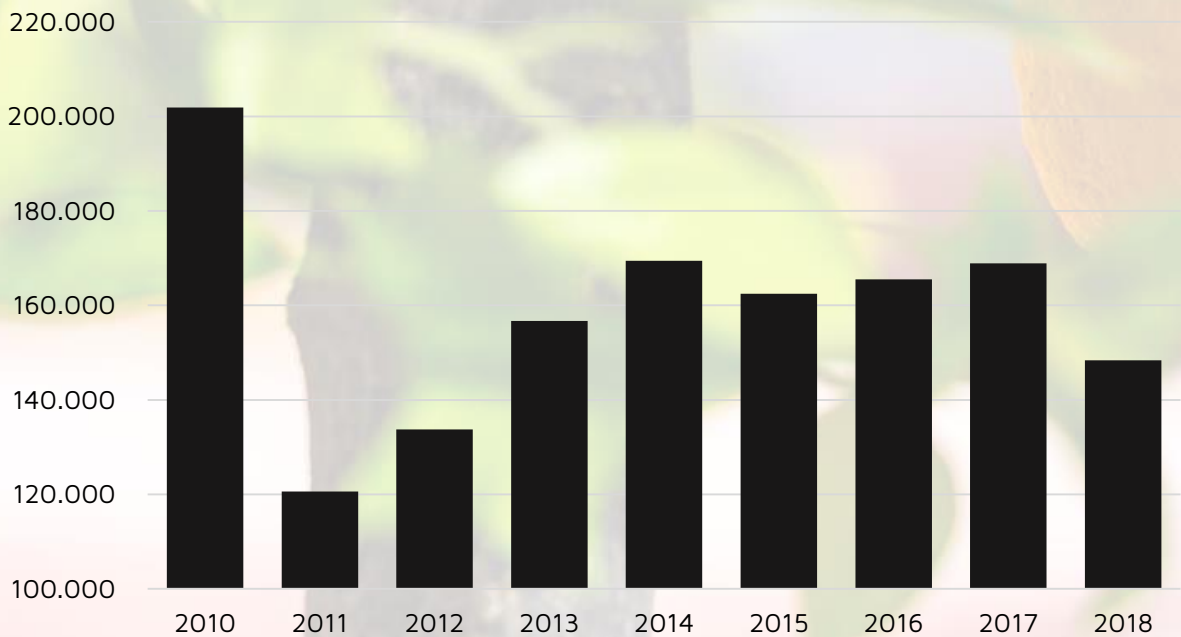


Note: (*) beans, peas, chickpeas, lentils
Source: Ministry of Agriculture, ONICL

Market of green beans in Morocco

- Annual domestic production of green beans around 120,000 – 200,000 tons
- Approximately 75% of production is exported
- Main export market is the EU (France, the Netherlands)
- Imports of green beans are limited to < 20,000 tons annually

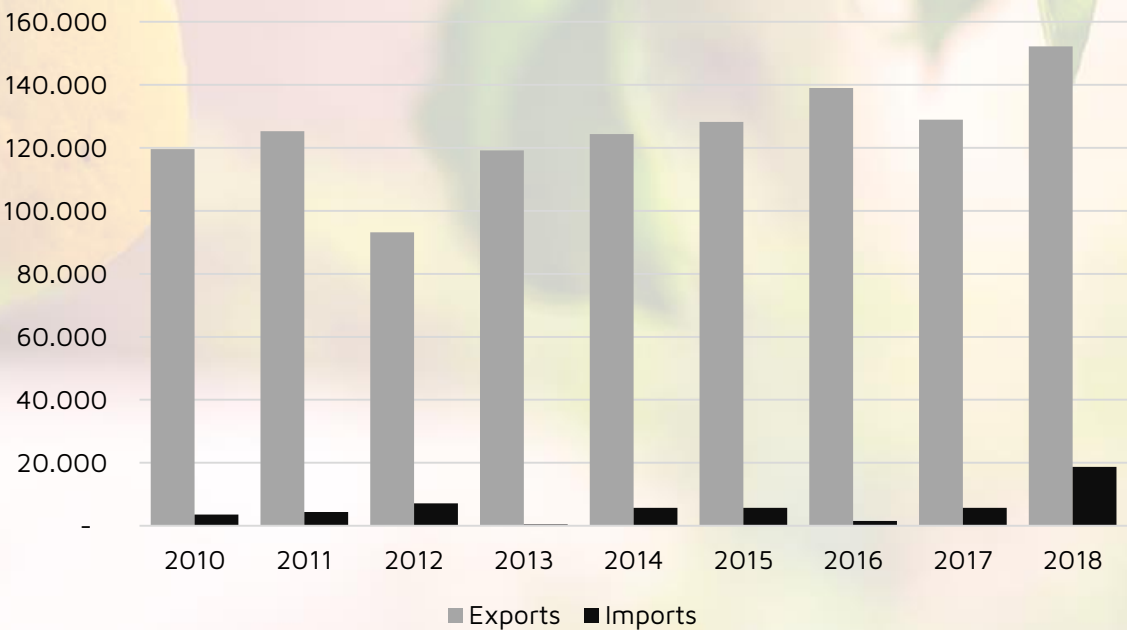
Production of green beans (tons)



Source: FAO

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Exports/Imports of green beans (tons)

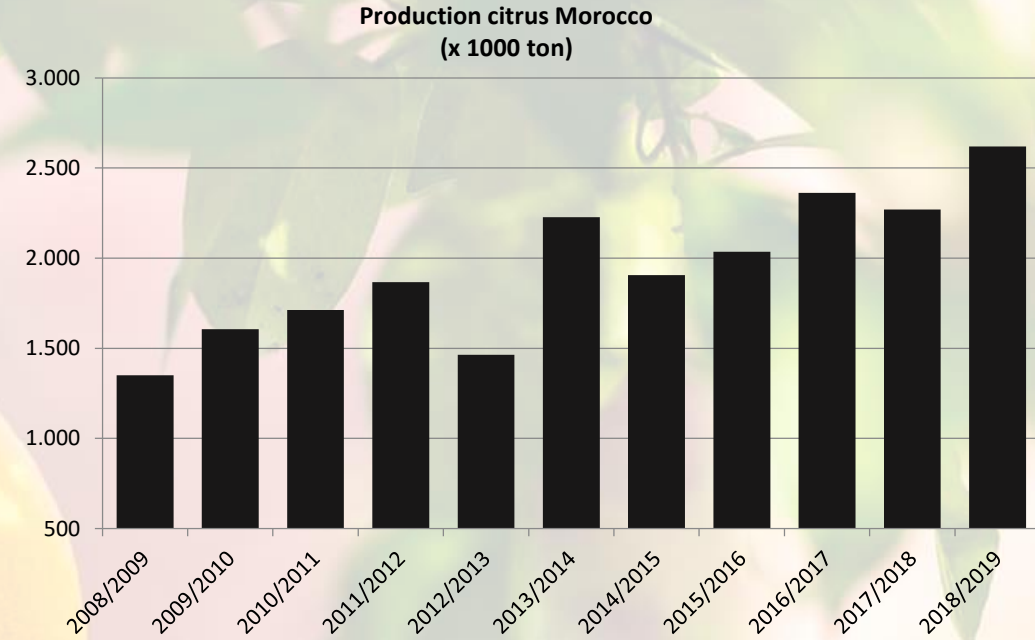


Source: Office des Changes

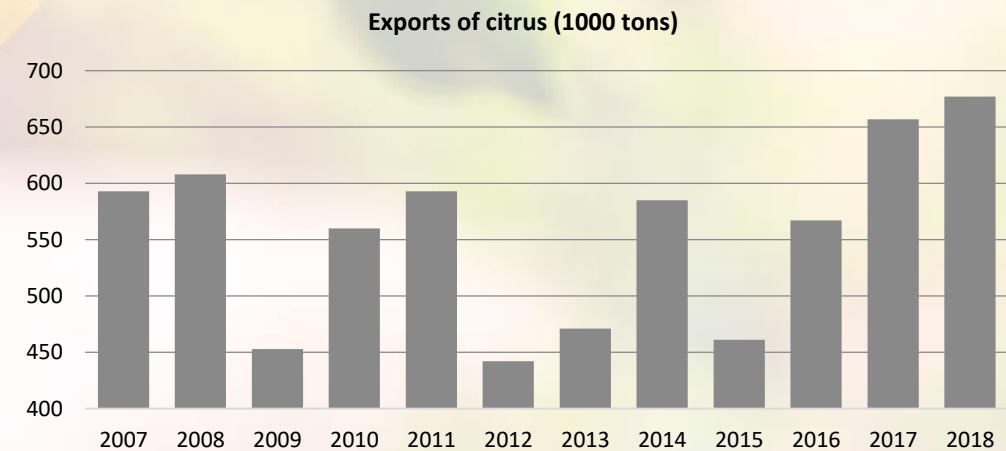
Market of citrus in Morocco

- 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
- Annual production between 2 – 2.6 million tons
- Citrus production increased strongly since 2009
- Citrus production: 65% sold directly on the market; 5% for industrial processing; 30% for direct exports

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Source: Ministry of Agriculture

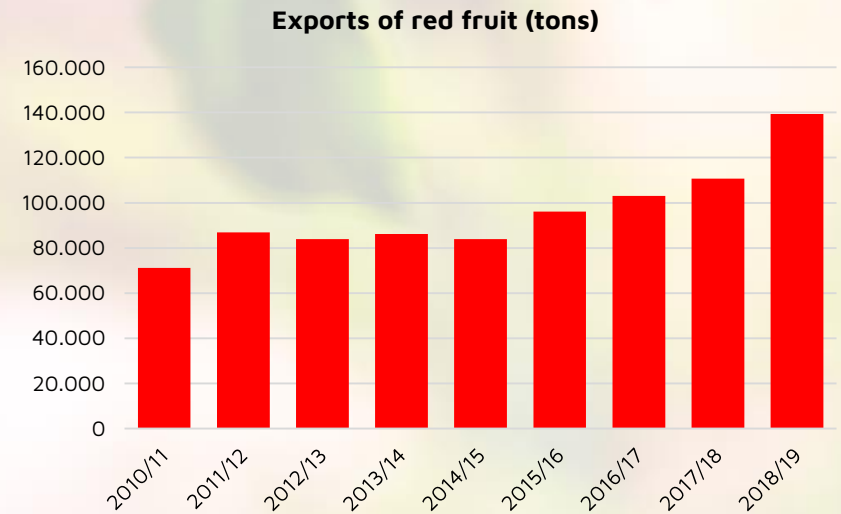


Source: Ministry of Agriculture

Market of red fruit in Morocco

- Total cultivated area of red fruit (95% is strawberry, raspberry, blueberry) in Morocco is 9,000 ha.
- Around 630 farmers active in red fruit cultivation
- Annual production (November – June) of red fruit is currently around 200,000 tons
- **Strawberry** production 148,000 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 26,000 tons of which 90% is exported (fresh and frozen)
- **Blueberry** production in Morocco since 2008
- Annual blueberry production around 22,000 tons of which 95% is exported (fresh and frozen)
- EU market is main destination Moroccan red fruit exports (95%)

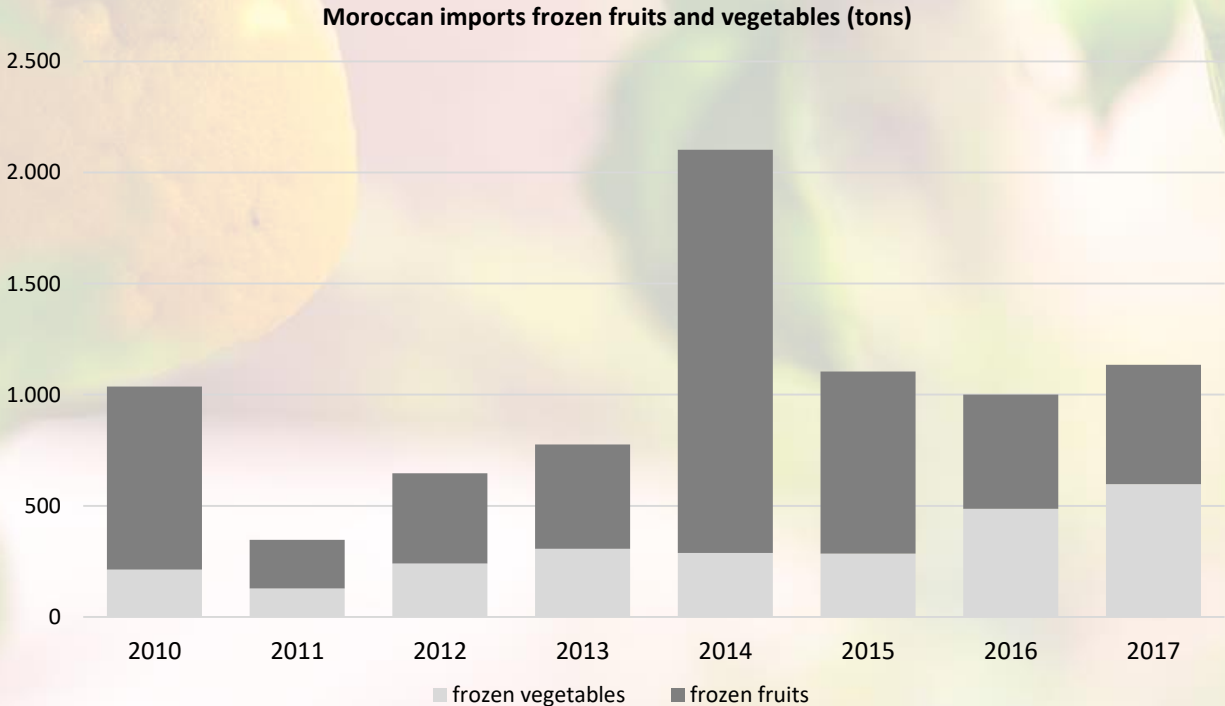
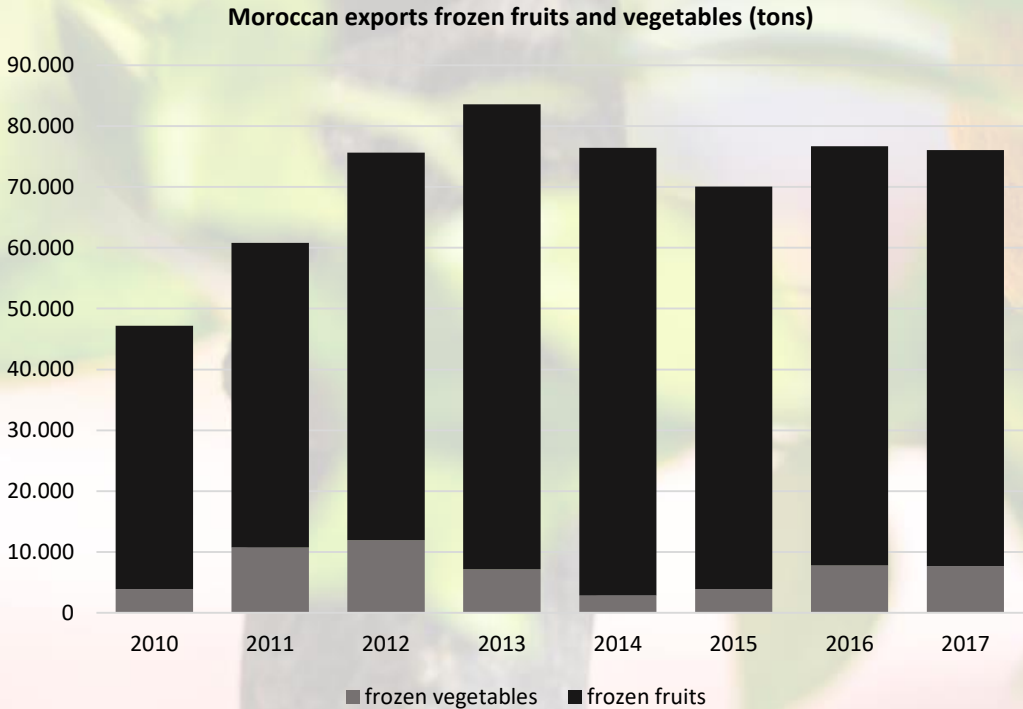
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Source: Association marocaine des fruits rouges

Market of frozen fruit and vegetables in Morocco

- 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



Source: Office des Changes



Thank you for your attention

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