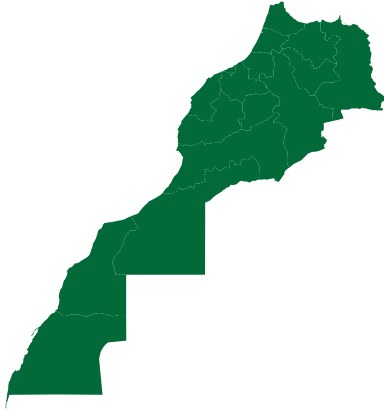


# COUNTRY SNAPSHOT: MOROCCO



Morocco is the 4th largest economy in Africa with a growing population. All U.S. imports to Morocco are duty free due to the United States-Morocco Free Trade Agreement (FTA). Morocco is the largest importer of soybean meal in the Middle East and North Africa and one of the top 15 importers of U.S. Soybean meal. It has the largest compound feed production in Maghreb markets.

U.S. Soy has collaborated with Morocco since 1995.

## COUNTRY STATS

**POPULATION**  
(2021) 36 million

**POPULATION**  
(2025) 46.2 million

**GDP**  
(2021) \$113 billion  
**PER CAPITA INCOME**  
(2021) USD 3,240

## MARKET STATS

Soy usage market size by Volume, 2021 (Est. growth by 2025)

<b>Animal Protein (total)</b>	650 000 TMT (20%)
<b>Poultry</b>	552 500 TMT (15%)
<b>Dairy</b>	65,000 TMT (20%)
<b>Any other soy usage</b>	32,500 TMT (20%)

### Livestock Population

(1000 head)

<b>Cattle</b>	<b>2020</b> 3 500
<b>Dairy cattle only</b>	1 800
<b>Poultry</b>	412 750
<b>Sheep and goats</b>	21 000

### Production

<b>Poultry Meat (1000 t)</b>	635
<b>Milk (1000 t)</b>	2 550
<b>Aquaculture (1000 t)</b>	16



# LOCAL SOY CONSUMPTION

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Soybean imports	111	66	56	34	0	69
Soybean imports US %	85	73	89	97	0	78
Oilseed imports	81	82	49	66	79	60
Soybean meal imports	637	571	606	570	693	660
Soybean meal imports US %	62	61	57	55	54	61
Soybean oil imports	465	497	492	546	573	545
Soybean oil imports US %	19	4	6	0	0	18
Soy oil exports	23	13	11	7	23	26

## STRENGTHS

- No market access issues, as import conditions were greatly improved with better infrastructure and predictable shipping services.
- U.S. soybean meal is appreciated for its quality and consistent supply of available nutrients.
- U.S. soybean meal is the preferred source in poultry feed and the main market driver (85% of the meal imported).
- The Poultry Federation signed the sustainability recognition of U.S. Soy production protocols outlined in the Sustainable U.S. Soy Assurance Protocol (SSAP) in April 2017.

## OPPORTUNITIES

- Growth in animal agriculture. Poultry consumption growth is forecast at 5% yearly and covers over 55% of meat consumed. The largest growth is in dairy, beef, layer and broiler feed, prioritizing modern animal production and industries.
- Morocco is the first and only Arab and African nation to organize UN COP Forum twice, leading the global low carbon transition.
- Political stability in a troubled region and sound economic policies sustain a stable GDP growth.
- Poultry sectors, dairy and recently aquaculture are top government priorities, as growing demand is attributed to a rising middle class and urbanization rate.
- Morocco holds 77% of the world's total phosphate reserves and is the world's largest phosphate exporter. The mining sector in Morocco, including copper and silver, represents 10% of Morocco's GDP, with 90% coming from phosphates. As a first exporter, Morocco sustains agriculture worldwide.

## CHALLENGES

- New generations of professionals need refreshing of knowledge on U.S. Soy's advantages.
- Wet market; over 85% of broilers are processed in traditional shops, marketing channels are an issue.
- Purchasing still based on crude protein-based soy pricing practices. As poultry integrates, producers need to benefit more from formulation on digestible amino acids to improve returns.
- An emerging aquaculture feed sector in need of technical assistance to base fish feed on soy products.

Sources:  
- USSEC data  
- FAO