



MOROCCO

Middle East & North Africa Region

COUNTRY STATS

POPULATION

(2023): 37 million

POPULATION (2025):

46.2 million

GDP (2023):

\$147 billion

PER CAPITA INCOME (2023):

\$3,979

MARKET SNAPSHOT:

MOROCCO

Morocco ranks first in the Middle East & North Africa region and is in the top 10 U.S. market exports for soybean meal worldwide. The 2006 U.S.-Morocco Free Trade Agreement – the only one in Africa – assigns free duty status to all U.S. Soy imports. Morocco is the most diversified importer in North Africa, using soybean hulls, whole beans, oil and meal. The country holds 77% of the world's total phosphate reserves and is the world's largest phosphate exporter, sustaining agriculture worldwide.

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

MARKET STATS

Soy Usage by Sector 2022/23 (est. growth by 2035/40)

Animal Protein (total)	665,000 MT (5%)
Poultry	565.3 MT (3-4%)
Dairy	66.5 MT (2.5%)
Any other soy usage	33.3 MT (>25%)

MT=metric tons

Livestock Population, 2022		Production	
Cattle	3 million	Poultry meat (including turkey)	640 MT
Dairy	1.67 million	Milk (billion liters)	2.55
Sheep	21.6 million		
Goats	6.1 million		
Camels	0.183 million		

MT=metric tons

STRENGTHS

- U.S. soybean meal is appreciated for its quality and consistent supply of available nutrients. It is the preferred meal source in feed. Poultry has been the main market driver (85% of soybean meal imported). Morocco produces 4 million metric tons (MMT) of industrial compound feed (75% for poultry) plus on-farm feed. Growing fish feed production increases the need for additional soybean meal and extruded full fat soy.
- No market access issues hinder imports, as the country has greatly improved conditions, better infrastructure and reliable shipping services. USSEC maintains strong partnerships with key professionals in all market segments.
- The Poultry Federation (FISA) signed their recognition of sustainable U.S. Soy production protocols outlined in the U.S. Soy Sustainability Assurance Protocol (SSAP) in April 2017.

OPPORTUNITIES

- Political stability in a troubled region and sound economic policies sustain a stable GDP growth. The government prioritizes food sovereignty. The stable diversified soybean meal market and modern animal production industries meet local needs, and exports are growing.
- Growth and resilience in animal agriculture continue. Poultry production growth is forecast at 4-5% yearly and covers more than 55% of meat consumed. Poultry, dairy and recently aquaculture remain top priorities. Growing demand can be attributed to rising middle class and urbanization rate.
- With increased awareness of sustainability issues and environmental concerns, Morocco organized the United Nations Conference of the Parties forum, leading the global low carbon transition.

CHALLENGES

- Morocco is a wet market: 85% of broilers are still processed in traditional shops, and marketing channels need improvement.
- The new generation of professionals needs education on U.S. Soy's advantages.
- Purchasing is still based on crude protein-based soy pricing practices.
- The emerging aquaculture sector is in need of sustainable ingredients such as U.S. Soy.

Sources:

- <https://www.worldbank.org/en/country/morocco/overview>
- Statistica
- U.S. Census Soy Export Data for 2022-2023

