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Post: Rabat

Report Category: Retail Foods

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Report Highlights:

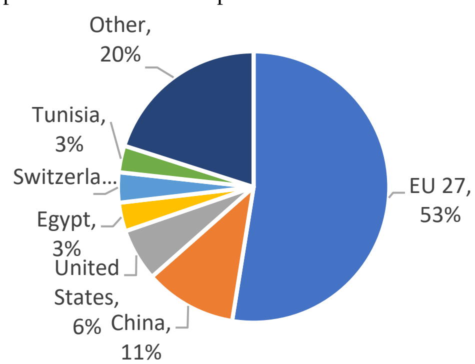
Morocco's retail sector in 2025 is still dominated by small traditional grocers, but there is steady growth potential for modern retail trade formats, particularly in urban centers, as consumer lifestyles shift and demand for convenience, variety, and competitive pricing expands. In 2024, U.S. exports of consumer-oriented products to Morocco reached $275 million. Post has identified U.S. almonds and pistachios, and limited volumes of seafood, chocolates, sauces, and spirits available on select Moroccan retail shelves. Best prospects include almonds, pistachios, protein concentrates, food preparations, cheese, rice, seafood, beer, spirits and liqueurs, sauces, and condiments. The U.S.-Morocco Free Trade Agreement is the only American free trade agreement on the African continent.

Executive Summary

Morocco, a U.S. Free Trade Agreement partner, is a price-sensitive market that does not showcase significant quantities of U.S. food and beverages in the retail sector. In 2024, U.S. exports of retail-related products to Morocco reached $275 million. Morocco imports limited volumes of U.S. pre-packaged dairy products, beef, sauces, and spirits. A surge in U.S. tree nuts primarily almonds exports is leading growth in retail and food service sectors, and a growing middle class and tourist sector is increasingly interested in convenient and healthy products.

Imports of Consumer-Oriented Products (2020-2024 Average Imports)

In 2024, U.S. exports of consumer-oriented products to Morocco amounted to $275 million, representing a 34 percent increase from the previous year's total $205 million. The United States continues to encounter intense competition from the European Union.



Sources : Office des Changes, TDM

Food Service Industry

The food service industry in Morocco is expected to grow, despite inflationary pressures. Morocco's food service industry is most developed in Casablanca (commercial center) and Marrakech (tourism).

Food Processing

Morocco's food processing industry represents 5 percent of Moroccan GDP and is comprised of 2,100 registered companies and 19 percent of industrial jobs in the country. Sales of processed foods generated about $16.2 billion in 2024 in Morocco. The U.S.- Morocco Free Trade Agreement provides tariff advantages for many U.S. food ingredient products.

Quick Facts CY 2024

Imports of Consumer-Oriented Food Products:
- $3.2 billion from the World
- $275 million from the United States

Top 10 Best Products:
- Sweeteners and confectionary
- Tree nuts
- Beef and poultry meat
- Dairy products
- Rice
- Food preparations
- Sauces and condiments
- Protein concentrates
- Seafood

Food Trade (U.S. billion):

Food Exports- Agricultural and Related Products total (2024)	$8.6
Food Imports- Agricultural and Related Products total (2024)	$11.3
Retail Food Imports (2024)	$2.3

Top Morocco's Retailers:
- Marjane Holding (Marjane and Acima)
- Label'Vie (Carrefour, Carrefour Market, and Atacadao)
- Ynna Holding (Aswak Salam)
- BIM Stores SARL (BIM)
- Akwa Group (Minibrahim)

Top 6 QSR Chains in Morocco:
- McDonalds
- KFC
- Pizza Hut
- Burger King
- Domino's Pizza
- Pomme de Pain

GDP/Population 2024:
Population *(millions)*: 36.82
GDP *(billions USD)*: $155
GDP per capita *(USD)*: $3,817

Moroccan Market Advantages and Disadvantages

Strengths	Weaknesses
US-Morocco FTA provides market access and opportunities to use Morocco as a platform to reach African market.	Distance and lack of shipping lines. Freight disadvantage.
Opportunities	**Challenges**
Morocco is one of the fastest growing economies in North Africa.	Erosion of U.S. preferences vis-à-vis Morocco's FTAs with the EU, Arab League.

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SECTION 1. MARKET SUMMARY

According to the International Monetary Fund (IMF), Morocco's GDP growth is expected to firm up in the medium term, and real GDP growth is projected to reach 3.9 percent in 2025, as agricultural output rebounds after the recent droughts and the nonagricultural sector continues to expand at a robust pace amid strong domestic demand, while inflation is expected to stabilize at around 2 percent and continues to disproportionally affect low-income households. A still solid but moderate industrial performance and a faster recovery in the tourism sector will continue to drive the economy in 2025. The Casablanca-Rabat corridor continues to account for nearly 50 percent of all modern retailers. Marjane Holding (Marjane and Marjane Market) and Label'Vie (Carrefour, Carrefour Market, and Atacadao) are Morocco's leading modern food retailers with other notables including Ynna Holdings (Aswak Salam) and the Turkish small format discounter BIM.

Recent Trends & Upcoming Events in Retail

- Marjane and Carrefour continue to invest in new outlets across the country. The increase in shopping malls in larger cities is contributing to the growth of hypermarkets in the country. In 2024, Marjane opened its first hypermarket in Laâyoune.

- Carrefour's franchise partner in Morocco, Label'Vie, continues to expand its total retail network from 270 locations in 2024 to 953 by the end of 2028. Marjane Group is accelerating its expansion across Morocco by prioritizing its new Marjane City neighborhood store format in 2025, designed to bring retail closer to households. Alongside these smaller urban outlets, the company is also strengthening its logistics network to sustain growth while continuing to roll out large-format hypermarkets.

- In the absence of official data, industry sources report that Marjane Holding remains Morocco's leading hypermarket operator in 2025, holding a 46 percent value share, followed by Label'Vie Group with 30 percent. Marjane continues to face competition from major players such as Label'Vie Group (operator of Carrefour) as well as discount chains like BIM.

- The Group Marjane introduced "Filière Exclusive M" to provide fresh, healthy, and high-quality food items while supporting local sourcing and short supply chains. These products can be found exclusively at Marjane Market, and on the Marjan online platform.

- Peak sales occur during Ramadan, which will take place on or about February 17 to March 19, 2026.

- The growth of internet and smartphone usage in Morocco has led to an increase in online shopping, offering retailers opportunities to expand their reach through e-commerce platforms.

- Food retail sector is a small but growing opportunity for U.S. exporters to take advantage of the U.S.-Morocco Free Trade Agreement (FTA).

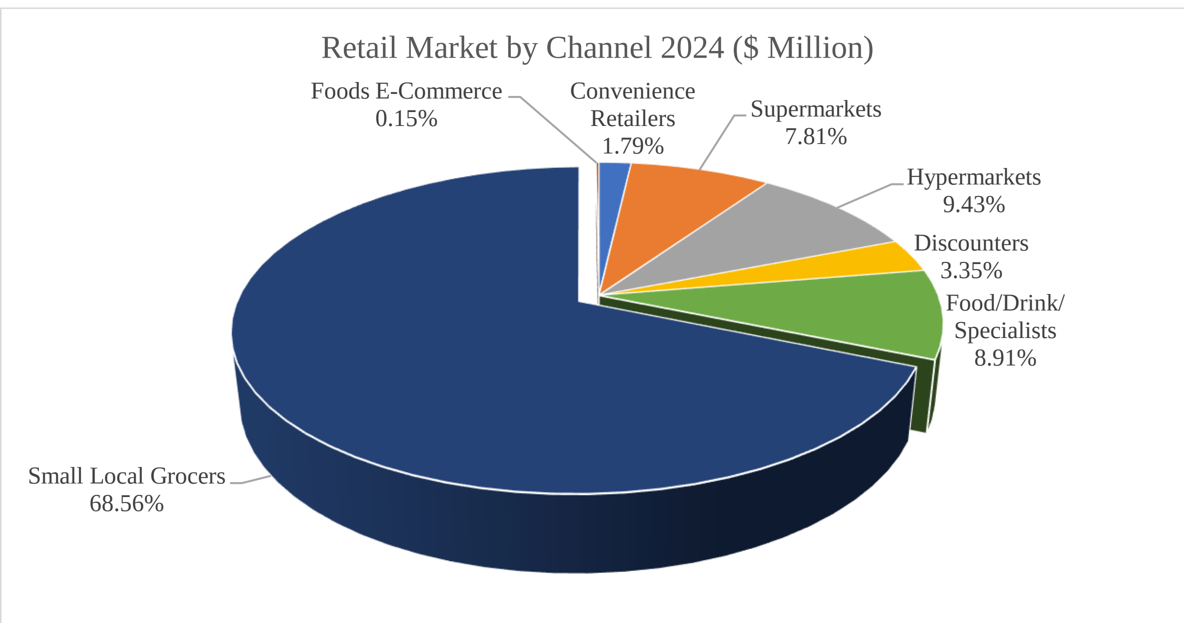
- The 4rth International Exhibition of Food & Drinks "SIAB EXPO MAROC" is scheduled to take place from December 10-13, 2025 in Casablanca. SIAB EXPO MOROCCO is an international trade fair for the food and drinks industry in Africa and Morocco.

Table 1: Moroccan Retail: Advantages and Challenges

Advantages	Challenges
Growing perception that supermarkets offer safer and cheaper products.	Supply chain: (1) Retailers have leveraged past and present foreign investment into Moroccan retail by U.S. competitors (Europe, Turkey) and (2) U.S. multi-national food companies have regional production.
The supermarket sector continues growing.	Market size: 36.8 million Moroccans, 10-15 percent of which can afford to buy imported products.
Importers are frequently searching for new-to-market products as they must update their portfolio in order to compete.	Moroccan importers tend to buy small quantities to test the market. U.S. companies are usually not willing to sell small quantities.
Increased acceptance of packaged food.	Entry fees for new products.

Retail Sales by Channel

The Moroccan retail market in 2024 remains highly fragmented and dominated by traditional outlets. According to *Euromonitor* data, small local grocers account for nearly 69 percent of total food retail sales, making them the backbone of the distribution sector across the country. This reflects Moroccan consumers preference for proximity stores, familiarity, and daily small-basket shopping habits. Modern retail formats, while growing, still capture a smaller share. Hypermarkets at about 10 percent and supermarkets at 8 percent, both serve mainly urban middle class consumers.



Source: Euromonitor, 2025 data

Hypermarkets are typically not within walking distance of residential areas and feature parking for up to 1,000 cars. They stock over 17,000 SKU in food items which account for 40-50 percent of total sales. As a result, retailers aggressively promote their products.

- Marjane is especially aggressive in advertising.
- Atacadao positions itself between a hypermarket and a discounter, targeting lower-income consumers, professionals, and small retailers, including through offering bulk purchase discounts.
- Aswak Assalam has reduced its number of stores.

Table 2: List of Hypermarkets Chains in Morocco

Retailer Name	Ownership	Est. Turnover, $Mill, 2024	Est. # of Outlets, 2024	Locations	Purchasing Agent type
Marjane	**Moroccan**: SNI Group	$3,800	Marjane**: 42** Marjane market: **52**	Casablanca, Rabat, Sale, Marrakech, Meknes, Taza, Tanger, Agadir, Kenitra, Mohamedia, Safi, Tetouan, Oujda, Saidia, Nador, Fes, Khouribga, Beni Mellal, Kelaat Es-Sraghna, Saleh, Al Hoceima, Fkih Ben	Imports direct and buys from importers
ATACADÃO	**Moroccan:** Label'Vie 95% **French:** Carrefour-5%	$1,600	**12**	Casablanca, Meknes, Fes, Marrakech, Mohammedia Rabat, Agadir, Oujda, Tanger	Imports direct via Label'Vie and buys from importers
Carrefour			**18**	Casablanca, Fes, Rabat, Marrakech, Sale, Meknes, Tanger	
أسواق السلام aswak assalam	**Moroccan:** Ynna Holding	$150-$200	**14**	Rabat, Marrakech, Agadir, Tanger, Casablanca Mohammedia, Kenitra, Emara, Oujda, Essaouira	Imports direct and buys from importers

Source: Industry websites

Supermarkets, Discounters, and Convenience Stores are in or within walking distance of medium to high-income neighborhoods and compete for urban consumers with traditional mom-and-pop shops and open-air markets. They are much smaller than hypermarkets but have a minimum of 20,000 ft², 3 to 6 registers, and feature limited parking space.

- ACIMA stocks at least 5,000 items
- Carrefour Market stocks around 10,000 products, including 4,000-5,000 food items. Carrefour carries specialty products like pork and alcohol.

- Discount food outlets such as BIM, which opened in 2009, have grown in popularity, followed by relative new-comer Costcutter. Label'Vie addresses the deep-discount market segment through its Atacadao stores – see above.

- Morocco has only independent convenience stores.

Table 3: List of Supermarkets Chains in Morocco

Retailer Name	Ownership	Est. Turnover, $Mill, 2024	Est. # of Outlets, 2024	Locations	Purchasing Agent type
marjane market	**Moroccan:** SNI Group	$100-$150	52	Casablanca, Rabat, Tanger, Marrakech, Fes, Safi, Khouribga, Beni Mellal, Temara, El Jadida, Berrechid	Imports direct via Marjane and buys from importers
Carrefour market Label'Vie	**Moroccan:** Label'Vie-95% **French:** Carrefour-5%	$500-$600	**87**	Casablanca, Mohamedia, Rabat, Meknes, Kenitra, Marrakech, Fes, Agadir, Sale, Khemissat, Settat, El Jadida, Temara,	Imports direct via Label'Vie and buys from importers
BIM	**Turkish:** Groupe Birlesik Magazal A.S	$50-$100	604	Casablanca, Rabat, Sale	Import direct
Costcutter	**British**	N/A	1	Marrakech,	n/a
U express	**French**	N/A	3	Casablanca, Rabat	Imports direct
Other Small Supermarkets (≥ 3 registers, >25000 ft²)	Local – private	$50-100	37	Casablanca, Rabat, Agadir	Buys from importers
Other Large Grocery Stores (Self-service, ≥ 1 register, < 2000 ft²)	Local -private	$100-150	285	Casablanca, Marrakech, Rabat, Agadir	Buys from importers

Source: Industry website

Gas-marts are 500 to 3,300 ft², typically feature one electronic register, and typically supply convenience foods. They are often located along highway rest stops connecting Morocco's major cities. Stores are usually expensive and carry some imported convenience items, like snack foods, beverages, and confectionary.

Table 4: Major Gas-marts in Morocco

Retailer Name	Est. # of Outlets 2024*	Location	Purchasing Agent
Afriquia Mini-Brahim (Managed by Maroshop)	50	Casablanca, Marrakech, Agadir, Meknes, Fes, Settat (These commercial spaces, open 24/7)	Buys from Importers
Shell Gas Stations (Select Shop)	30	Casablanca, Rabat, Marrakech	Buys from Importers
TotalEnergies Marketing Maroc (Service)	NA	Casablanca, Rabat, Marrakech	Buys from Importers
Mobile Gas Stations on the Run developed by Exxon	16	Casablanca, Rabat, Marrakech	Buys from Importers

Source: Industry Websites, *No official data is available from the Moroccan Ministry of Commerce and Industry

Traditional Markets - "Mom & Pop" Small Independent Grocery Stores

Imported products are not well positioned in this market segment. This category includes an estimated 45,000 grocery stores that are not in the above categories. Their size varies from less than 200 ft² to 1,000 ft². These shops have limited financial resources and are typically managed by one person. In cities, these stores may have a refrigerator. A very small number have ice cream freezers. Convenience, proximity, and consumer credit based on personal relationships with their customers are their strongest assets. Mom-and-pop stores are supplied via multiple distributors, wholesalers, and sometimes larger retailers.

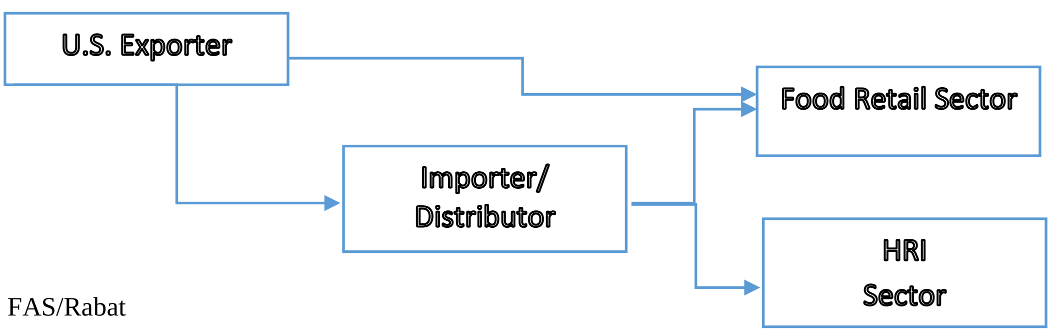
Figure 1: Small independent grocery store

SECTION 2. ROAD MAP FOR MARKET ENTRY

U.S. exporters should identify a Moroccan importer or distributor, with whom they can build a relationship. Local Moroccan companies are best suited to navigate local regulations, understand distribution chains, and have relationships with retailers, food processors, hotels, restaurants and institutions.

In addition to working with the central purchasing platforms of large, modern retailers for high volume and/or private label orders, new products can also be introduced through the handful of established importers that directly supply modern retailers. Exporters may be able to meet Moroccan food retailers and their importers at SIAL (Paris), ANUGA (Germany), ALIMENTARIA (Spain), or Gulfood (Dubai), Americas Food & Beverage Show (Miami). U.S. exporters are invited to contact AgRabat@fas.usda.gov to facilitate introductions.

Figure 2: Moroccan Retail Market Structure



Source: FAS/Rabat

SECTION 3. COMPETITION

Table 5: Agricultural Products and Main Suppliers to Morocco

Category	HS	Description	Avg Imports, 2020-24 World	USA	%	U.S. Duty	MFN Duty	Foreign Competitors
Meat & Poultry	0201/0202	Beef, Chilled/Frozen	$25,750,495	$100,676	0.39%	0%/200%[1]	200%	Aust, EU
	0207	Poultry, Chilled/Frozen	$3,787,227	$253,566	6.7%	0%100%[1]	100%	EU, Turk, Braz, **US**
Fishery Products	0302/0304	Fish, Chilled/Frozen	$25,982,406	$88,6281	2.34%	0%	10%	EU, UK
	0306	Crustaceans	$96,790,205	$31,941	0.03%	0%	40%	EU, Cand, AR
	0307	Molluscs	$60,839,831	$813,366	1.0%	0%	10%	EU, Chin
Dairy	0406	Cheese	$141,229,830	$2,143,404	3.52%	0%	25%	**US,** EU, Egt
Vegetables	0710	Vegetables, Frozen	$1,118,022	$17,606	0.01%	0%	25%	EU, **US,** Egt
Fruits & Nuts	080211/ 080212	Almonds	$123,962,440	$122,004,043	98.42%	0%	40%	**US,** EU
	080250/ 080251	Pistachios	$15,156,022	$12,840,239	84.72%	0%	2.5%	**US,** Iran, EU
	080410	Dates	$209,125,017	$2,637	0.0%	0%	40%	UAE, Tuni
	080620	Raisins	$21,597,276	$21	0.0%	0%	30%	India, Turk, Uzb
	080810	Apples, Fresh	$5,563,307	$0	0.4%	0%	40%	EU, Aust, **US**
	080820/ 080830	Pears, Fresh	$27,710,216	$0	0.0%	0%	40%	EU, Arg, Chile
	081320	Prunes, Dried	$3,465,135	$67,678	1.95%	0%	30%	EU
Coffee, Tea, Spice	0902	Tea	$217,218,800	$60,543	1.75%	0%	32.5%	Chin, India
	0904/ 0910	Spices	$64,393,663	$34,855	0.02%	0%	2.5%	Braz, VT, EU
Cereals	1006	Rice	$47,751,260	$1,489,460	7.5%	0%	2.5%	Thai, India, **US**
Oils	150910	Olive Oil, Virgin	$8,319,718	$0	0.0%	0%	40%	EU, Tuni
Meat Products	1602	Meat & Poultry, Prep/Pres	$17,468,975	$162,870	0.3%	0%	40%	EU, Braz
	1604	Fish, Prep/Pres	$39,402,604	$8,672	0.0%	0%	40%	Sengl, EU
Confection	170490	Sugar Confection (not gum; no cocoa)	$22,633,687	$95,011	0.4%	0%	25%	EU, Turk, Chin
Chocolate	1806	Cocoa Food Prods (e.g., Chocolate)	$96,015,674	$299,075	0.3%	0%	17.5 %	EU, UAE, **US**
Cereal Products	190120	Mixes & Doughs	$3,963,128	$24,908	0.4%	0%	10%	EU, UAE, **US**
	1904	Cereal Food Preps-Swelling/Roasting	$21,177,410	$11,634	0.1%	0%	10%	EU, Tury, Chin
	1905	Bread, Pastry, Cakes, Wafers, etc.	$133,063,879	$1,311,744	2.3%	0%	40%	EU, Tury, Egt
Fruit, Nut & Veg Products	200190	Prep Veg/ (not pickles)	$385,704	$255	0.07%	0%	40%	EU, Chin
	2005	Prep Veg, Not Frzn	$27,359,402	$60,596	0.22%	0%	40%	EU, Chin
	2008	Prep/Pres Fruit/Nuts (not juice nor jams)	$21,387,991	$543,662	2.52%	0%	40%	EU, Egt, Thai
Food Products	2103	Sauces & Condiments	$59,526,412	$603,282	1.01%	0%	40%	EU, Egt, Chin
	210610	Protein Concentrates	$6,580,481	$4,299,742	64.62%	0%	10%	**US,** EU
	210690	Food Preparations	$114,385,481	$2,284,944	2%	0%	10%	EU, Tuni, **US**
Beverages, Vinegar	2202	Non-alcoholic bvg	$55,164,238	$155,944	0.28%	0%	40%	EU, UAE
	220300	Beer	$24,430,392	$5,290,367	21.31%	0%	49%	EU, Mex, Rus
	2204	Wine	$34,662,121	$44,717	0.12%	0%	49%	EU, **US,** Rus
	2208	Spirits & Liqueurs	$46,688,638	$5,303,089	11.4%	0%	49%	EU, **US,** Rus
Petfood	230910	Dog & Cat Food	$42,707,530	$6,664	0.0%	0%	2.5%	EU, Turk
Ess Oils	3301	Essential Oils	$1,659,248	$42,834	2.5%	0%	25%	EU, Chin

[1] *Subject to Tariff-Rate Quota, see 2022 GAIN Report*

SECTION 4: BEST PRODUCT PROSPECTS

Products present in the market that have good sales potential:

- Tree nuts, including almonds

Products not present in significant quantities but which have good sales potential:

- Prunes, Raisins, Cranberries
- Rice
- Pulses
- Apples
- Canned Fruit and Vegetables
- Dairy Products
- Frozen food, including Seafood
- Breakfast Cereals
- Food Preparations
- Confectionary
- Snack Foods, including Popcorn, Cookies, and Crackers
- Health and Diet Products
- Sauces and Condiments
- Dog and Cat Food
- Wine, Beer, Spirits
- U.S. poultry and beef, including beef livers and premium U.S. beef.

Products not present because they face significant barriers:

- Organics – labeling

SECTION 5. KEY CONTACTS AND FUTHER INFORMATION

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Attachments:

No Attachments