

#### 4.5.4.6 Morocco

#### 4.5.4.7 Demographics

The total number of poultry farms in Morocco were estimated at 8,513. Approximately, 90% of the poultry farms were commercial chicken farms, totaling to 7,627 commercial chicken operations. The average number of chickens on commercial chicken farms were 27,232 head. The remaining 10% or 885 of poultry farms were turkey farms. The average size of a turkey farm was 11,893 head.

Morocco's poultry production and consumption have both increased since 2010. In 2019, poultry production totaled 841,562 metric tons, representing a 37% increase compared to 2010. Consumption of poultry has 19% from 626,066 metric tons in 2010, to 747,367 metric tons in 2019.

The total number of poultry stocks in Morocco were 218.2 million head in 2020. Chickens represented 95% (207.7 million head) of Morocco's poultry stocks. Turkeys accounted for the remaining 5% (10.5 million head) of poultry stocks in Morocco. Since 2010, chicken stocks increased 22%, and turkey stocks increased 17% in Morocco.

In 2020, poultry slaughter totaled 641.9 million head and was comprised of chickens and turkeys.

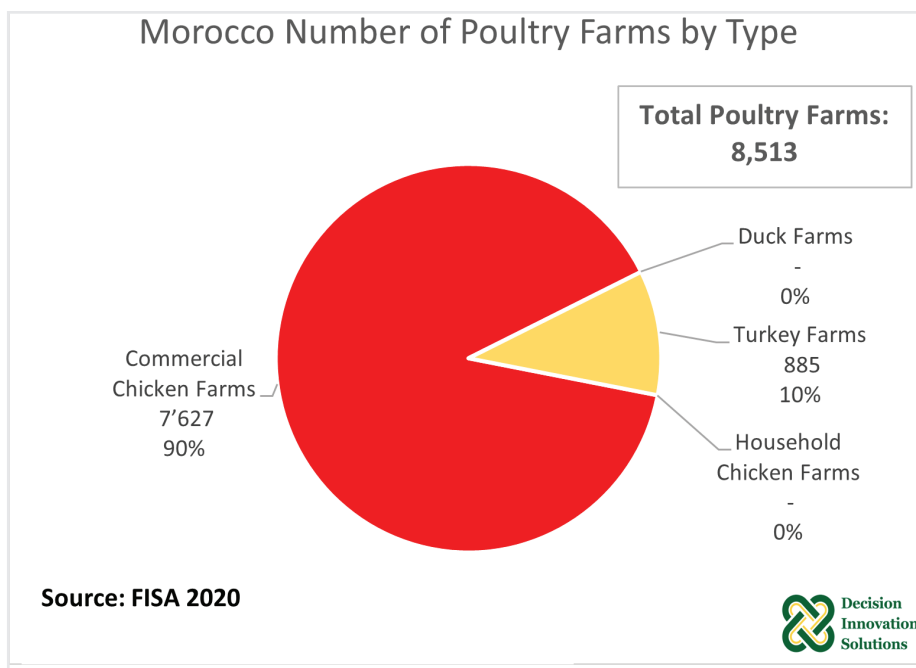


Figure 186. Morocco number of poultry farms by type

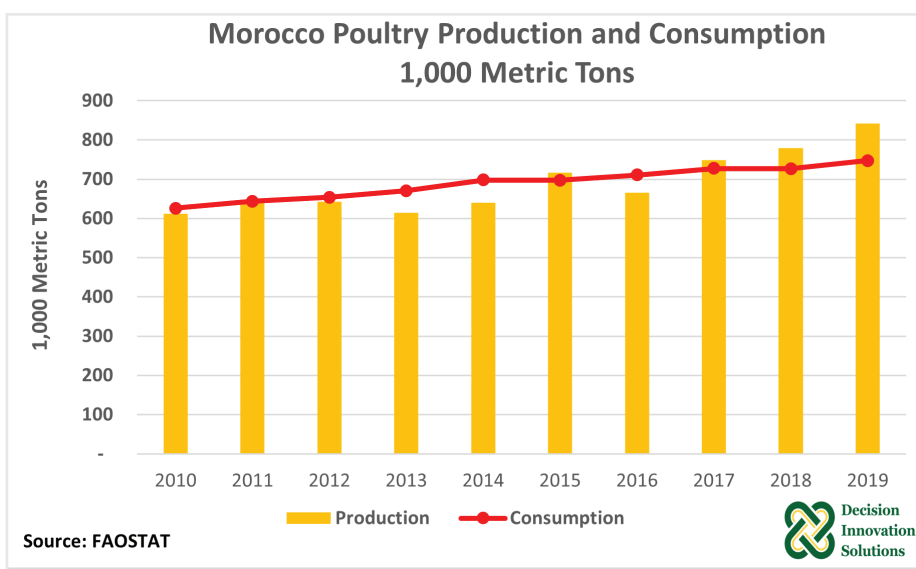


Figure 187. Morocco poultry production & consumption

An estimated 98% (630.2 million head) of poultry slaughter was chickens. The remaining 2% (11.7 million head) of Morocco's poultry slaughter was turkeys. Compared to 2010, Morocco's chicken and turkey slaughter increased by 33% and 11%, respectively. Morocco's poultry production in 2020 included 822,000 metric tons of chicken and 60,000 metric tons of turkey. Compared to 2010, Morocco's chicken and turkey production increased 47% and 15%, respectively.

MOROCCO POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	207'696		10'525	218'221
Producing Animals/Slaughtered	630'217		11'706	641'923
Production (1,000 MT)	822		60	882

Sources: FAO, 2020

Table 55. Morocco poultry stocks, slaughter & production

#### 4.5.4.8 GDP and Value of Production

In 2020, the total value of GDP for Morocco was \$112.9 billion. Non-agricultural production sectors represented an estimated 88% or \$99.7 billion of the total GDP. Crop production represented 7% or \$7.4 billion. An estimated 4%, or \$4.4 billion, was derived from red meat production in Morocco. Representing about 1% or \$1.2 billion, chicken production was the largest contributor from the poultry production sector. Turkey production was less than 1%, or \$168.7 million of the total GDP (Figure 188).

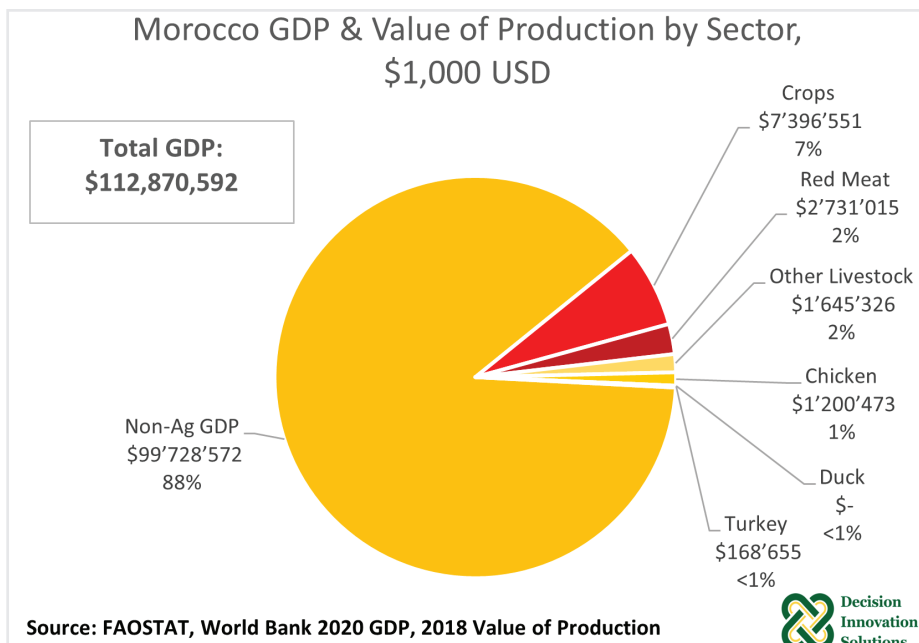


Figure 188. Morocco GDP & value of production by sector

ECONOMIC EFFECTS - MOROCCO (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$13'142'000	\$9'612'098	\$22'754'118	\$89'180
Livestock	\$5'745'469	\$4'202'247	\$9'947'716	\$38'988
Poultry	\$1'369'128	\$1'605'987	\$2'975'115	\$11'453
Chicken	\$1'200'473	\$1'408'155	\$2'608'628	\$10'042
Duck				
Turkey	\$168'655	\$197'832	\$366'487	\$1'411

Source: FAOSTAT, OECD Input-Output Tables. \*Taxes is equal to total taxes net of subsidies

Table 56. Economic effects - Morocco

The combined (direct and indirect) effects of agricultural production in Morocco are estimated to be \$22.8 billion. Of this amount, \$3.0 billion comes from the poultry industry, with \$2.6 billion from chicken meat production and \$366 million from turkey production. Agriculture pays a net value of \$89 million in taxes, \$11 million of which is estimated to be from the poultry industry (Table 56).

#### 4.5.4.9 Labor

The total number of people working in the labor force for Morocco was estimated at 11.7 million in 2020 (Table 57). Of that total, nearly 8.7 million (74%) of the labor force participants were male and 3.0 million (26%) were female. Non-agricultural labor accounted for an estimated 8.0 million jobs.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - MOROCCO			
	Total	Female	Male
Total Country Labor	11'665'214	2'997'499	8'667'715
Non-Agricultural Labor	7'985'135	1'577'998	6'407'137
Agricultural Labor	3'680'079	1'419'501	2'260'578
Total Non-Poultry Agricultural Labor	3'294'844		
Total Poultry Labor	385'235		
Chicken Labor	337'780		
Turkey Labor	47'455		
Other Poultry Labor	-		
		Wages (\$1,000 USD)	
Total Meat Processing Labor	5'004		\$22'426
Livestock Processing Labor	3'333		\$14'938
Poultry Processing Labor	1'671		\$7'489

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 57. Agricultural labor force characteristics - Morocco

The remaining 3.7 million jobs were in agricultural sectors. The total number of people employed in the poultry production sector totaled 385,235 in 2020.

In 2020, an estimated 5,004 people were employed in Morocco’s meat processing sector. The total wages earned from meat processing was \$22.4 million. Livestock meat processing was the largest share of meat processing with 3,333 jobs and \$15 million in wages earned. Poultry meat processing accounted for 1,671 jobs and \$7.5 million in wages earned.

#### 4.5.4.10 Trade

Senegal, Guinea, and Liberia were the three largest markets for Morocco’s poultry meat exports in 2020. Morocco’s total poultry meat exports to these three markets reached over \$834,357 (see Figure 189 and Figure 190).

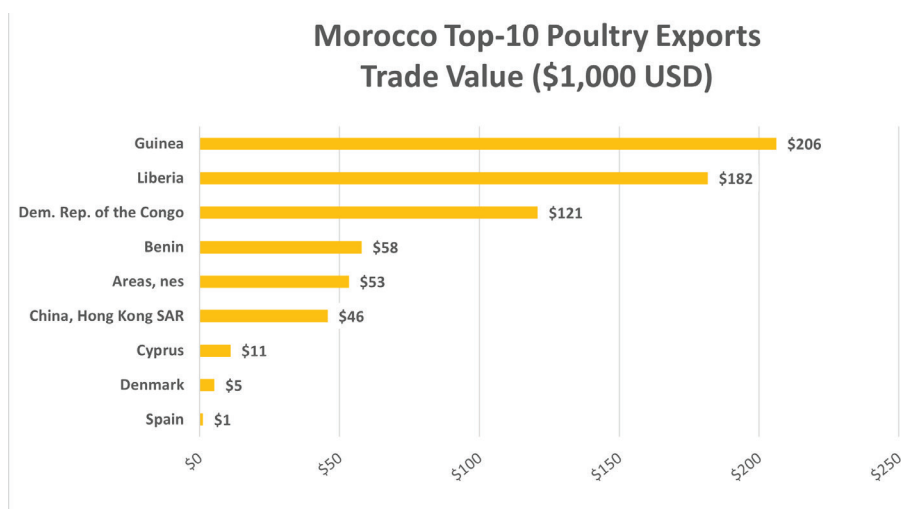


Figure 189. Morocco top 10 poultry exports, trade value

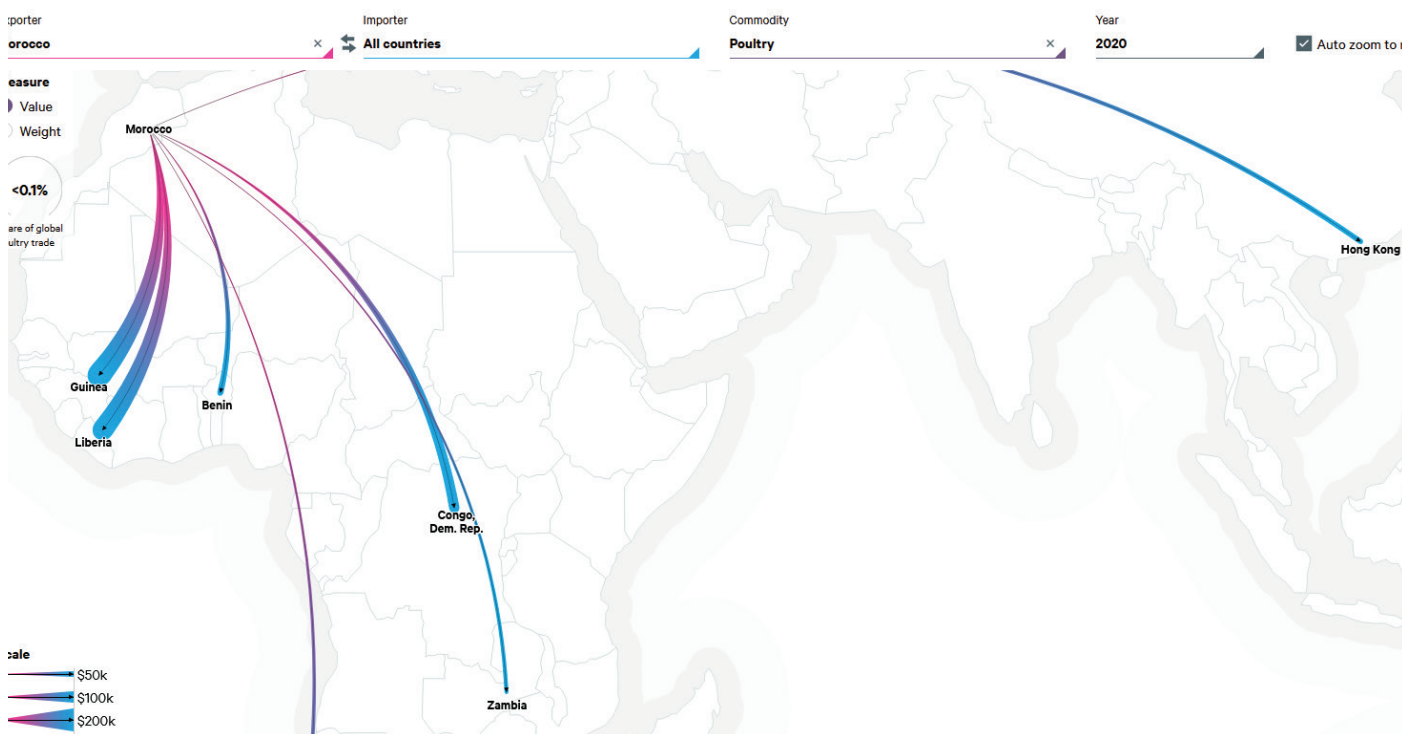
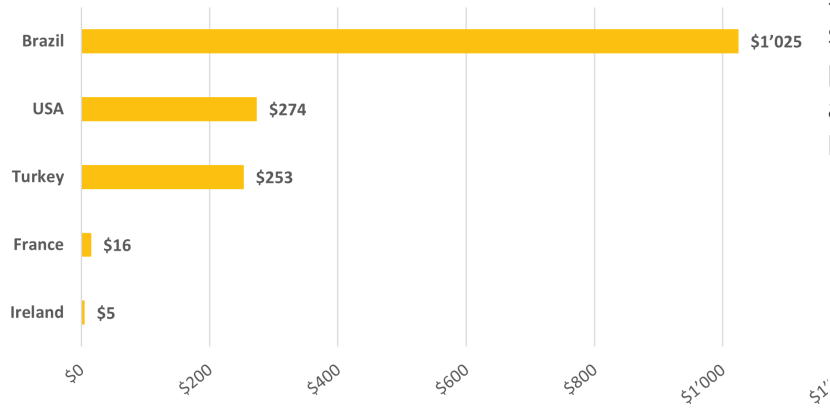


Figure 190. Morocco poultry export flows

## Morocco Top-10 Poultry Imports Trade Value (\$1,000 USD)



Most of Morocco's poultry imports were shipped from Brazil (\$6.2 million). At a smaller scale, Morocco also imported poultry meat from the Germany (\$2.8) and France (\$980,145) in 2020 (see Figure 191 and Figure 192).

Figure 191. Morocco top 10 poultry imports, trade value

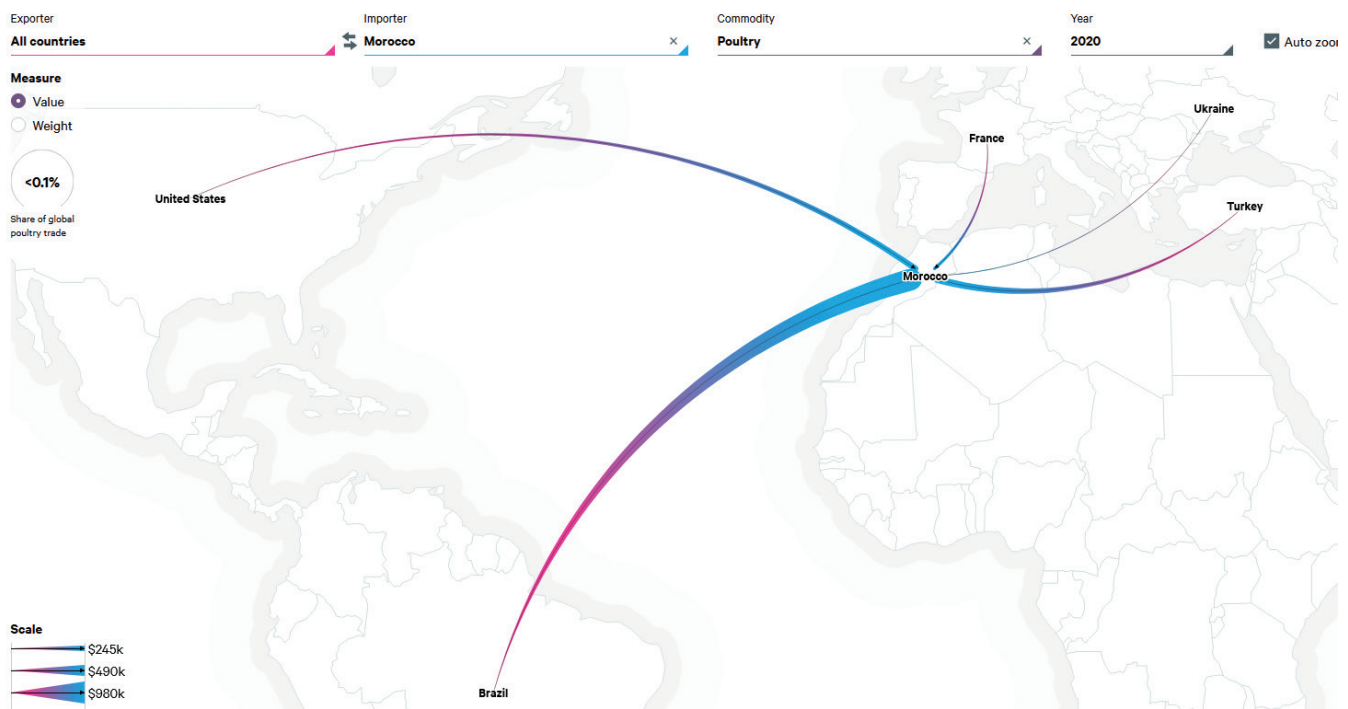


Figure 192. Morocco poultry import flows