



CBI
Ministry of Foreign Affairs

Moroccan coffee market

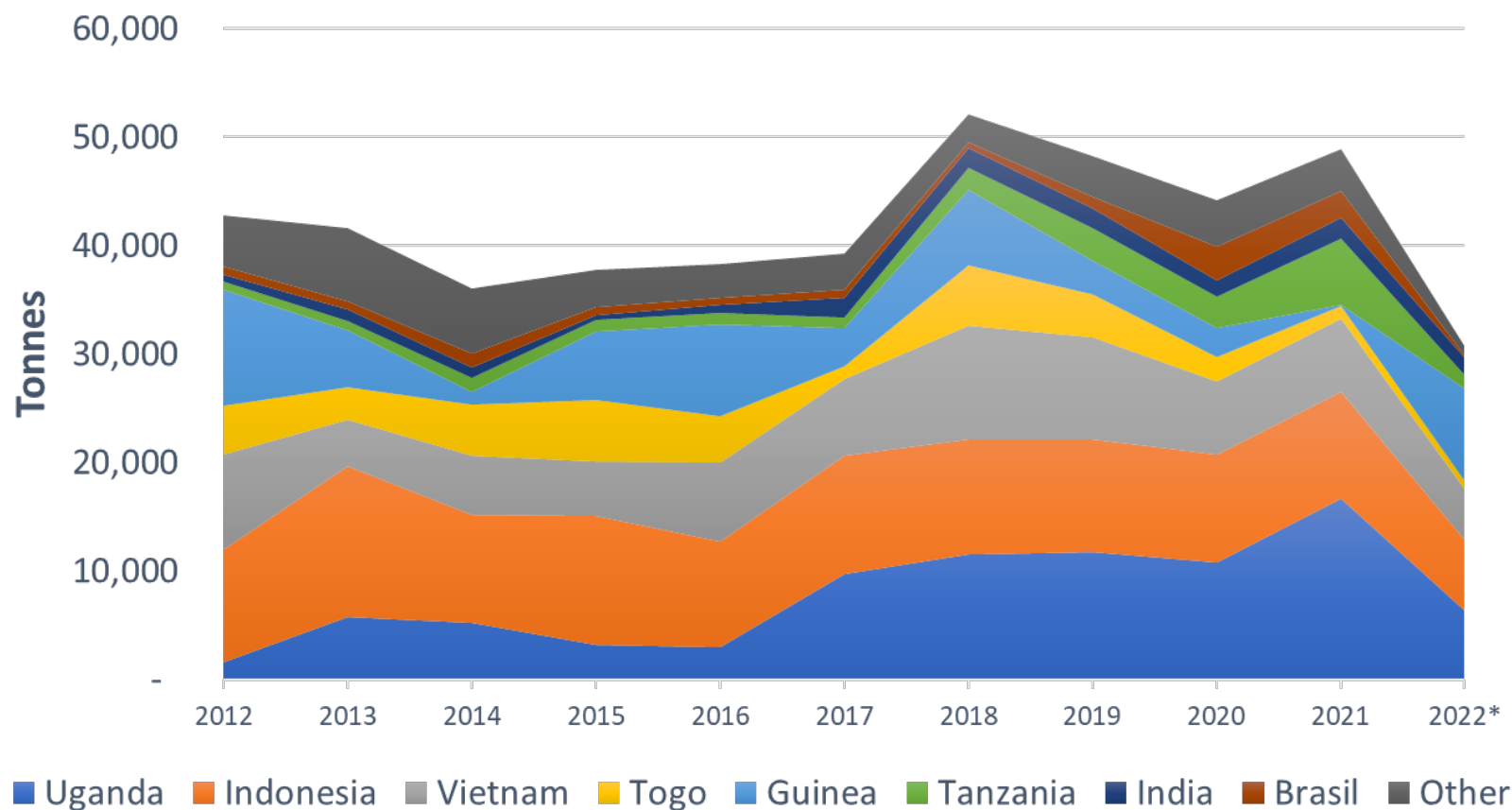
Potential for coffee exports
from Guinea

*Lisanne Groothuis &
Bettina Balmer*





Moroccan green coffee imports



Total imports: 49 thousand tonnes in 2021

➤ 75% of imports are Robusta, 25% Arabica

Main suppliers: Uganda, Indonesia, Vietnam, Togo, Guinea and Tanzania

➤ African coffees most popular in Morocco; often substitutable by from quality point of view

Source: Moroccan 'Office des Changes', 2022



Moroccan green coffee imports vs. Roasted coffee imports

	Green coffee imports	Roasted coffee imports
Growth rate 2017 - 2021	5.7%	30%
Share of total imports:	In 2017: 97% In 2021: 94% -3%	In 2017: 2.9% In 2021: 6.4% +3.5%

- Increase in roasted coffee imports shows a growing interest in premium coffee products in Morocco, which is often sourced from Europe as a finished product.
- Moroccan roasters face competition for their high-end coffees from the imports of roasted coffee products.

Example >
Città d'Italia from Alea Food, imported from Italy





Moroccan coffee market size

CURRENT SITUATION

- > **Per capita coffee consumption** is low: 0.8 kg of coffee per year
 - To compare: Algeria 3.5 kg; Tunisia 1.5 kg
- > **Per capita consumer spending** on coffee is low: €35 per year
 - To compare: Israel €105; Qatar €78

Coffee competes with tea, a popular (traditional) drink in Morocco!

GROWTH POTENTIAL

- > **Rapid urbanization** drives up consumption of coffee as coffee is mostly consumed in cities
- > **Consumer spending on coffee** is expected to **grow at 3.3%** yearly between 2022-2026



Trends on the Moroccan coffee market

→ Changing consumer interest in quality!

Coffee capsules: growing segment

- Often used by young people; by middle- and upper-classes, and; by the high-end hotel and restaurant sector
- Coffee origins that already have an established reputation: Ethiopia, Brazil, Colombia
- Large offer of capsules roasted and manufactured abroad; though local roaster are increasingly involved in capsule manufacturing

Premium coffee shops: growing market

- Examples: Espressolab, Columbus Café & Co, Caribou Coffee, Starbucks, etc.
- Require higher-quality green beans
- Drivers of growth: tourism, increased urbanization and young population



Source: <https://www.cafesdubois.ma/>



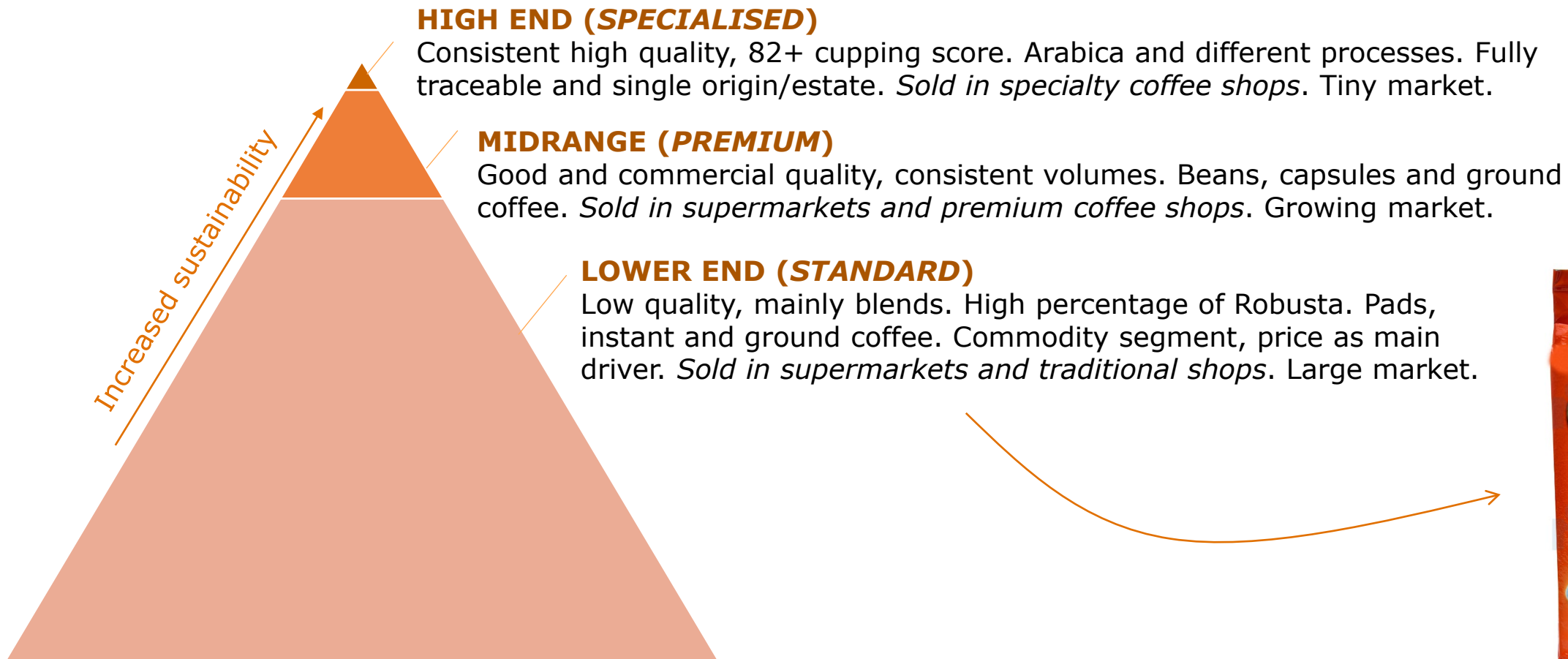
Perception of Guinean coffee in Moroccan market

- > Compared to popular African (Ugandan and Tanzanian) coffees: Similar character
- > Compared to Asian coffees: Strong flavour profile with chocolate notes
- > Guinea coffee is used by Moroccan roasters in blends with other Robusta and Arabica
- > Guinean Robusta little known to consumers as mainly used in blends





Guinean coffee used in lower-end segment



Source: Marjane Market, 2022

Source: ProFound, 2022



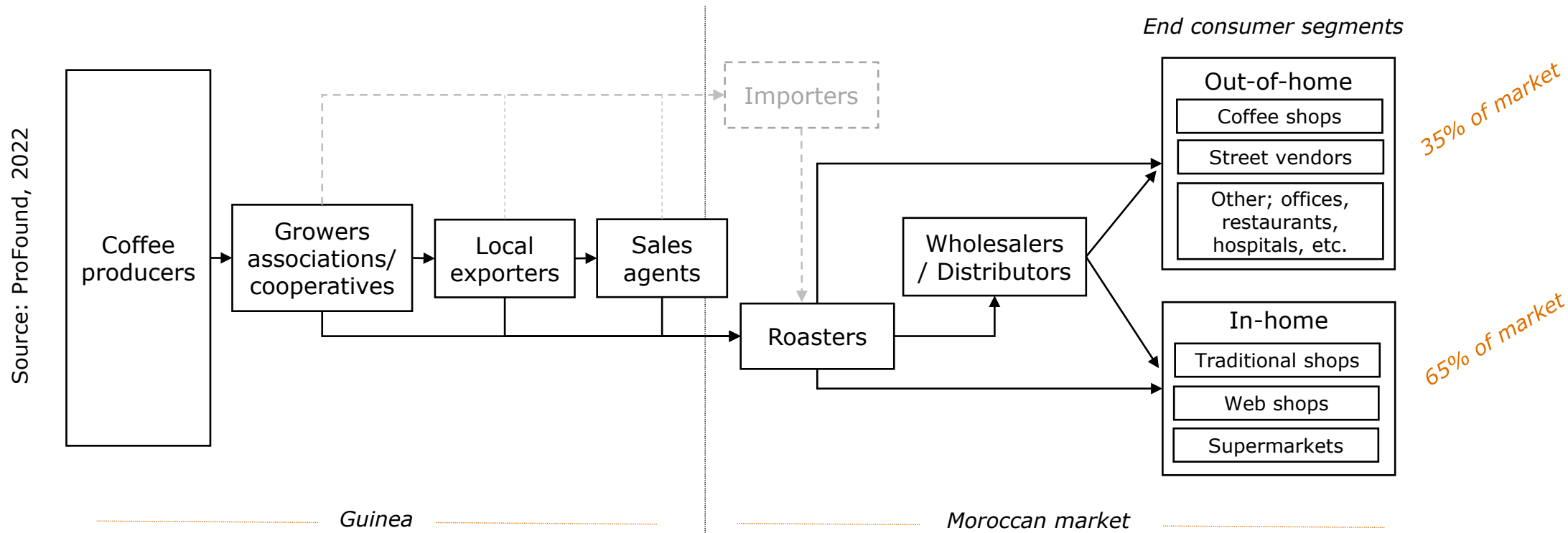
Quality requirements for Guinean green coffee

- > Moroccan roasters typically ask **grade 2 Guinean green beans**, sometimes grade 1.
 - Grade 3 is too small (!)
- > **Clean your coffee batches well:** Guinean coffee too often contaminated by dust
- > **Use good-quality jute bags:** too often bags arrive damaged, with seams undone
- > **Plan your supply:** inconsistency of supply volumes from Guinean exporters





Market channels for green coffee



- **Exporter > Big and medium roaster > Retail, restaurants etc.**
- **Exporter > Medium and small roaster > Wholesaler > Retail, restaurants etc.**



Examples of larger-scale Moroccan roasters



Large-scale roasters most interesting market channel for suppliers of low-grade Robusta

- Most concerned with price and volume

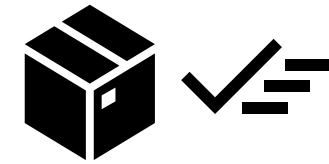


(!) These roasters will typically compare your coffee to that from other regions, in terms of **price**, **logistics** (time) and **quality** (!)



How to do business

Be cultural aware and know Moroccan business etiquette



Send samples to interested buyers



Be a consistent and reliable supplier



Know your product and find your ideal buyer



Thank you!



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