

Morocco: Intra-Africa trade and tariff profile 2020



Regional Economic Communities

Morocco is a member of the Arab Maghreb Union (AMU), the Community of Sahel-Saharan States (CEN-SAD), Pan-Arab Free Trade Area (PAFTA) and the Arab-Mediterranean Free Trade Area (AGADIR). Morocco has signed bilateral FTAs with Algeria, Egypt, Guinea, Libya, Mauritania, Senegal and Tunisia, according tariff preferences for some products. Morocco also grants unilateral preferential market access to 33 African LDCs for certain products

CEN-SAD

There is no trade agreement in place



CEN-SAD currently has 24 member states aspiring to establish an Economic Union for the free movement of goods, services and commodities. There is currently no free trade agreement in place.

PAFTA



PAFTA is an FTA between 18 Arab countries (Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestinian territories, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, United Arab Emirates, and Yemen).

AMU & AGIDIR

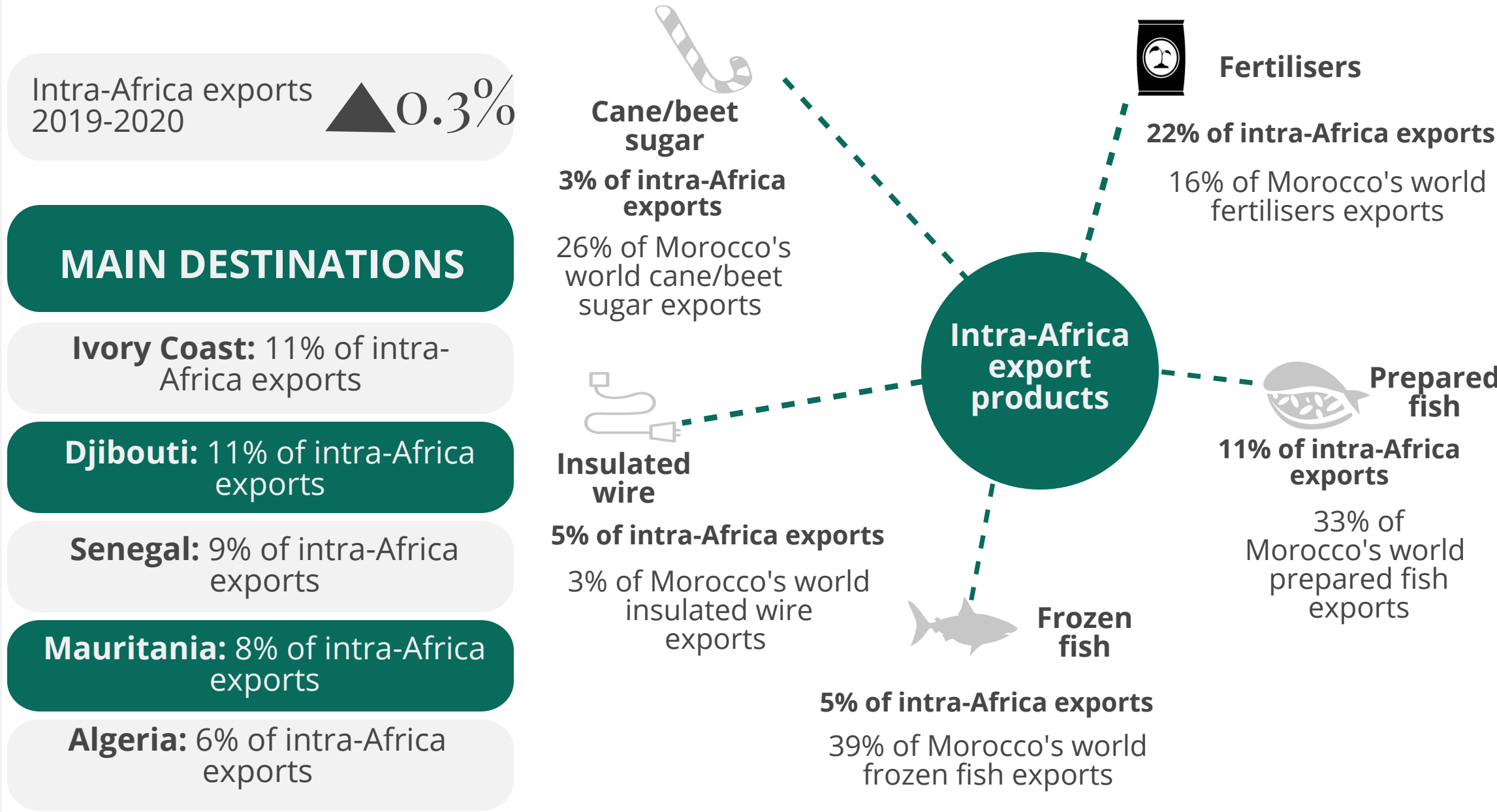


AMU members include Algeria, Libya, Mauritania, Morocco and Tunisia. There is not yet a free trade agreement (FTA) in AMU.

AGADIR provides for trade liberalisation among Egypt, Morocco, Tunisia and Jordan.

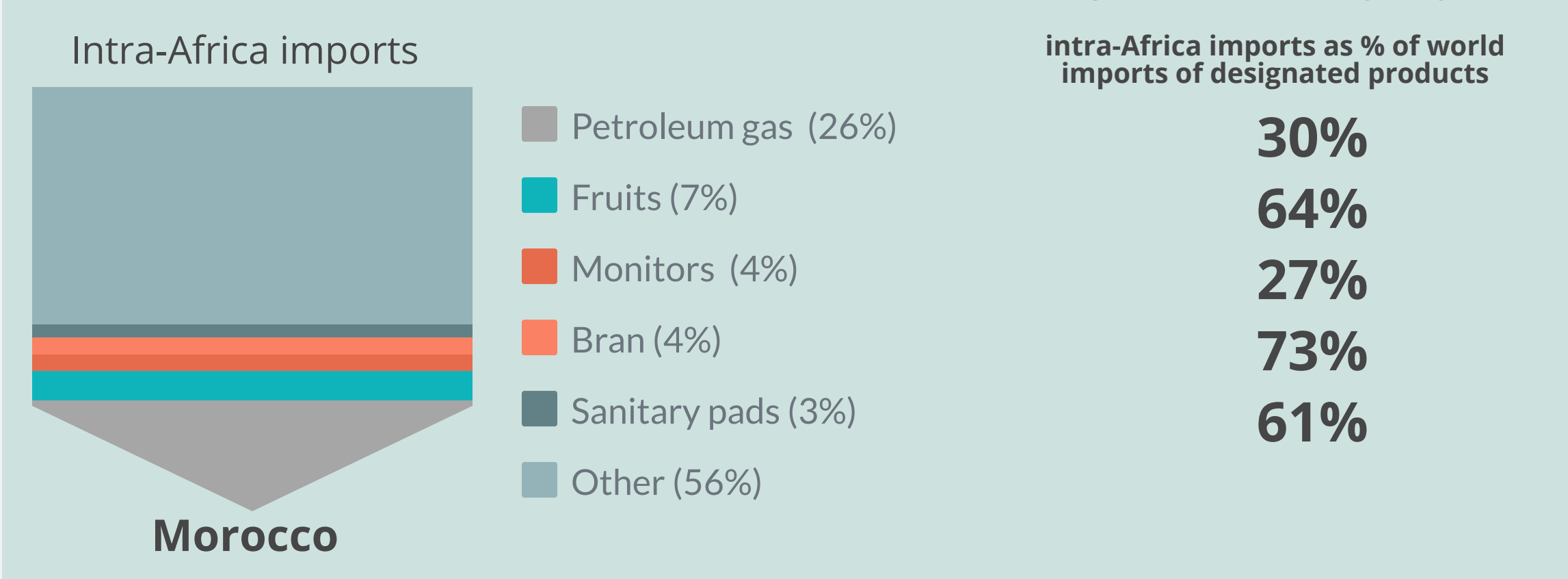
Intra-Africa exports

For 2020, 8% of Morocco's world exports were to the rest of Africa. The main African destination markets are Ivory Coast, Djibouti and Senegal. The value of 2020 intra-Africa exports is US\$2.2 billion. The main export products are fertilisers, and prepared or preserved fish.



Intra-Africa imports

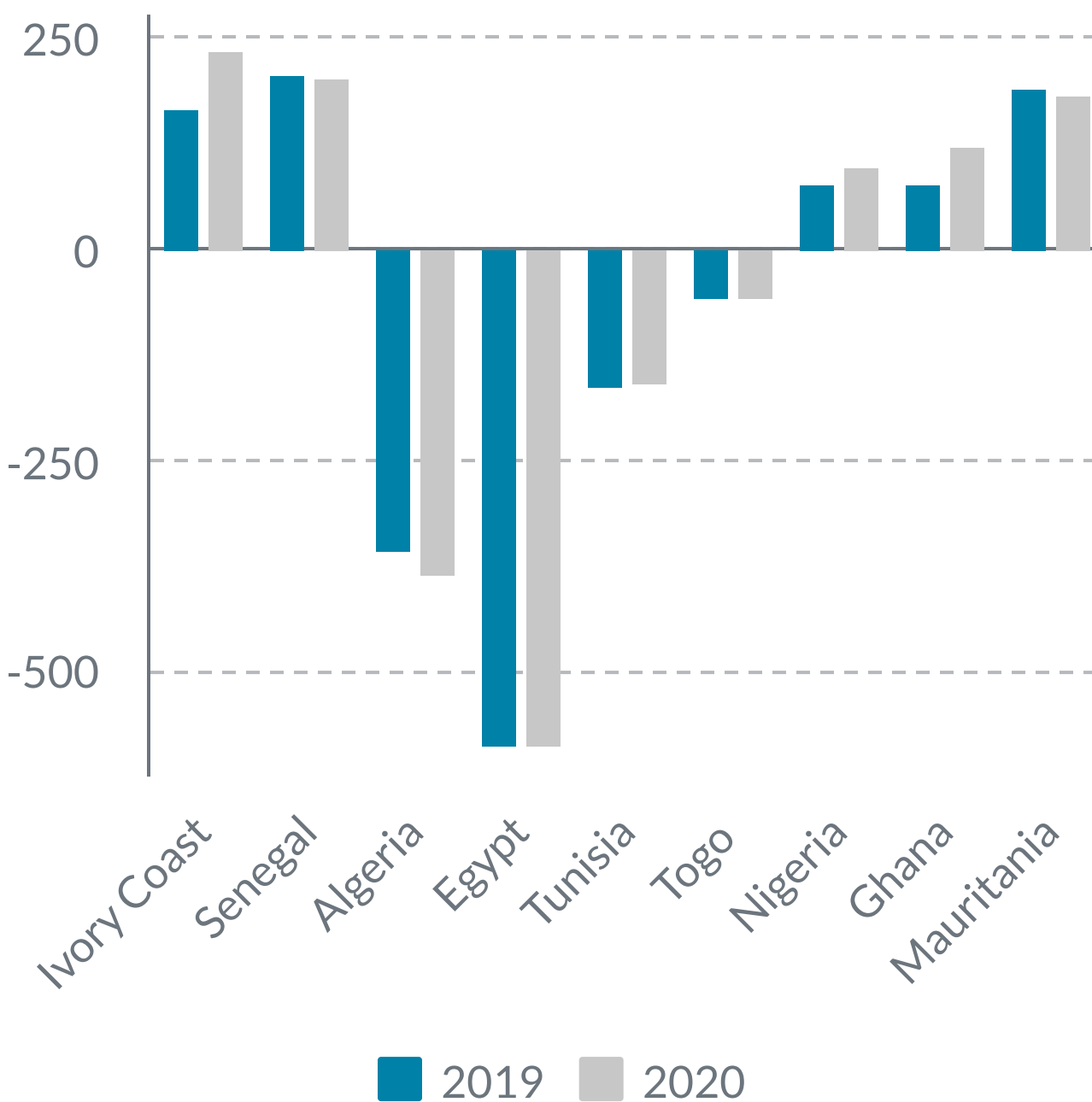
For 2020, 3% of Morocco's world imports were intra-Africa imports. Morocco's intra-Africa imports are mainly from Egypt, Algeria and Tunisia. Between 2019 and 2020, intra-Africa imports declined by 20%. Petroleum gas is the main import product.



% change in exports and imports (2019 to 2020)

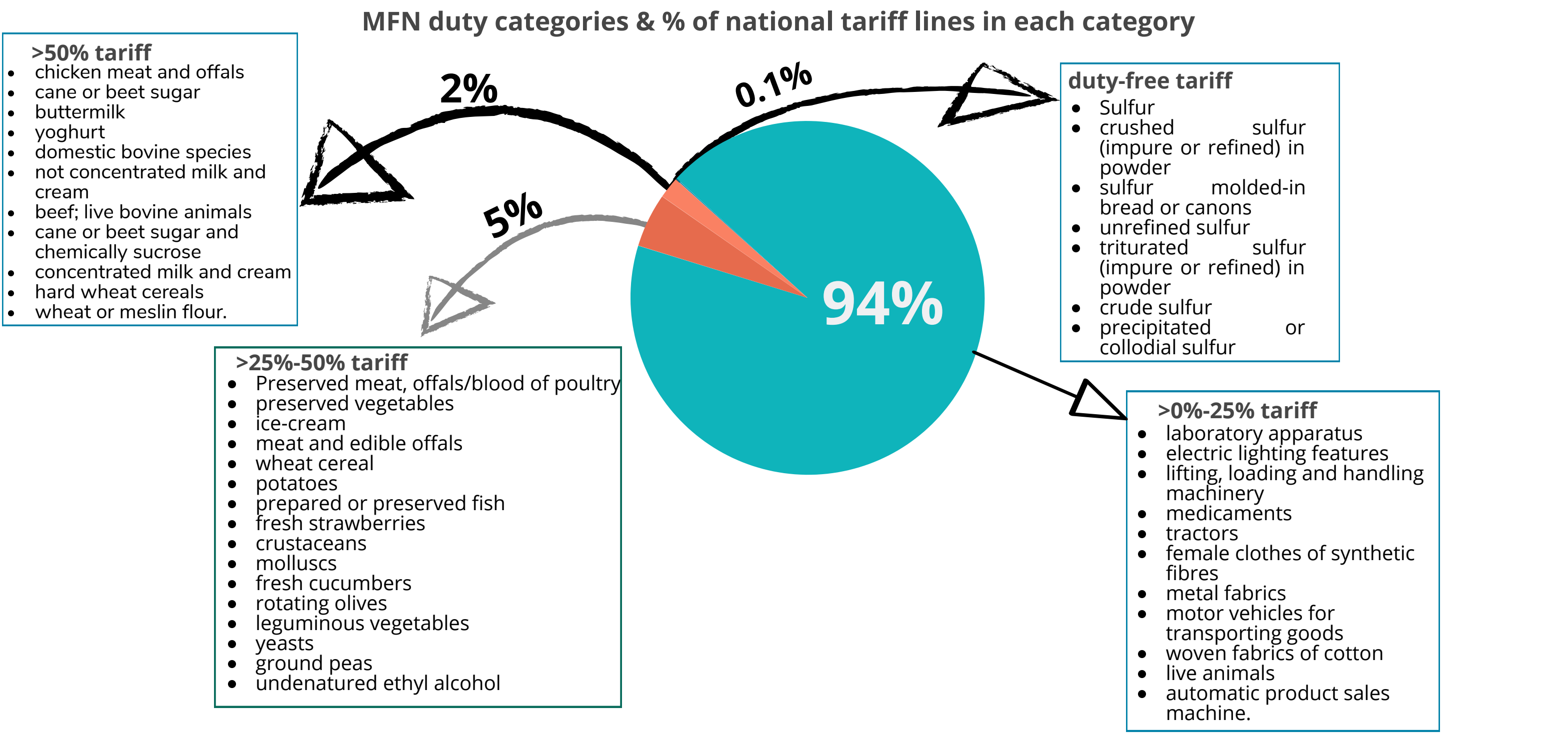
Egypt	Exports: 1% decline Imports: 14% decline
Algeria	Exports: 16% decline Imports: 16% decline
Tunisia	Exports: 5% increase Imports: 17% decline
Djibouti	Exports: 10% increase Imports: No data
Senegal	Exports: 3% decline Imports: 1% increase
Mauritania	Exports: 5% decline Imports: 41% decline

Trade balance with designated countries (US\$m)



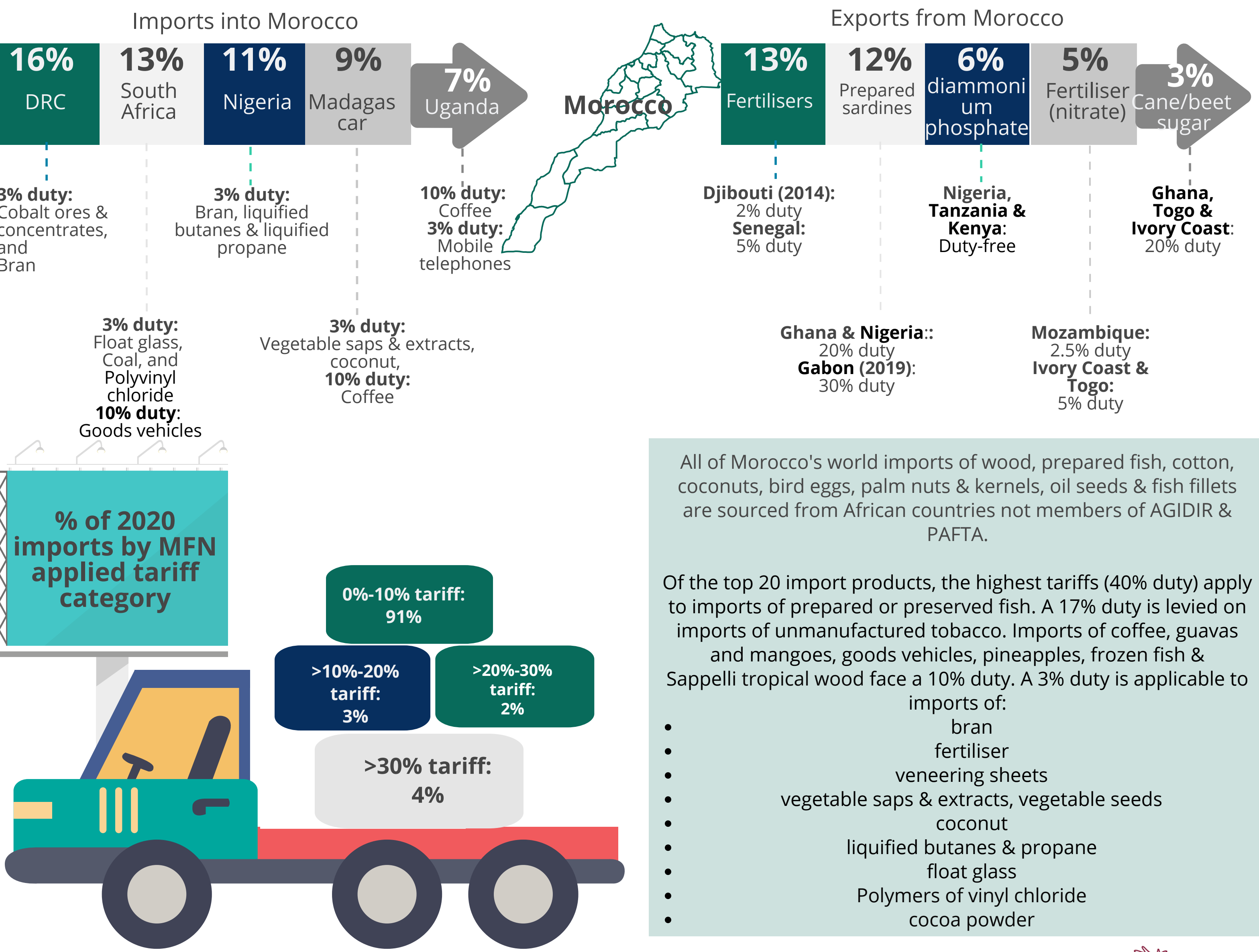
Intra-Africa tariffs

Most of the products from AGADIR & PAFTA countries enter Morocco duty-free. Imports from African countries outside AGIDIR & PAFTA face MFN applied; except for certain imports from 33 African LDCs.



Trade with African countries outside AGIDIR & PAFTA

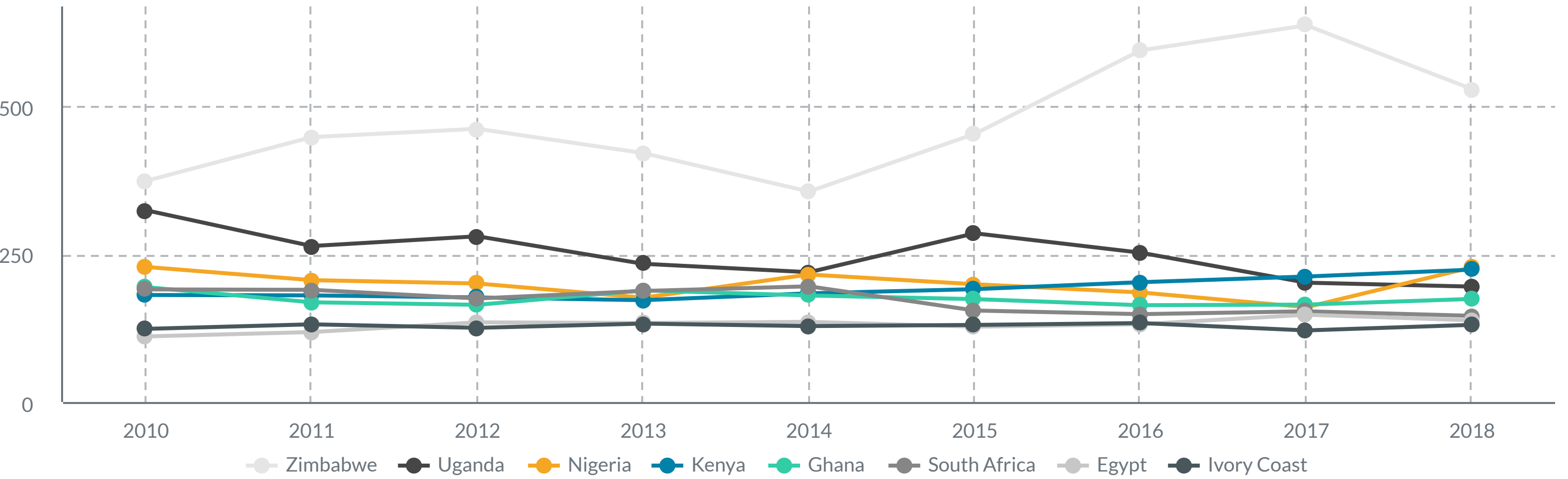
Only 7% of world and 83% of intra-Africa exports are to African countries not members of AGIDIR & PAFTA. Main export products are fertilisers and prepared sardines. In terms of imports, 1% of world and 17% of intra-Africa imports are sourced from countries outside AGIDIR & PAFTA. Imports are mainly bran, coffee, colbat ores and concentrated & veneering sheets.




Non-tariff trade costs


The ESCAP-World Bank trade cost database includes the cost of transportation and the time to complete import procedures and obtain necessary information as non-tariff costs affecting bilateral trade between trade partners. Morocco's trade with some African countries (including Botswana, Zimbabwe, Comoros, Ethiopia, DRC, Cape Verde, Nigeria, Kenya, Mauritius, Uganda, Benin & Ghana) is more costly than trade with China, UAE, Switzerland, Russia, India, the UK, Germany, Brazil and France.

Cost of bilateral trade between Morocco and designated countries; 2010-2018






Most costly export to South Africa via road transportation is woven fabrics (US\$7.06 per unit)




Apparel & clothing accessories:

- Cameroon US\$2.31 per unit)
- South Africa (US\$1.36 per unit)
- Ivory Coast (US\$0.6 per unit)




Copper articles:

- Namibia (US\$1.45 per unit)
- Cameroon (US\$0.46 per unit)
- Senegal (US\$0.28 per unit)




Per unit cost of transporting cane/beet sugar:

- Cameroon (US\$0.77)
- Senegal (US\$0.09)

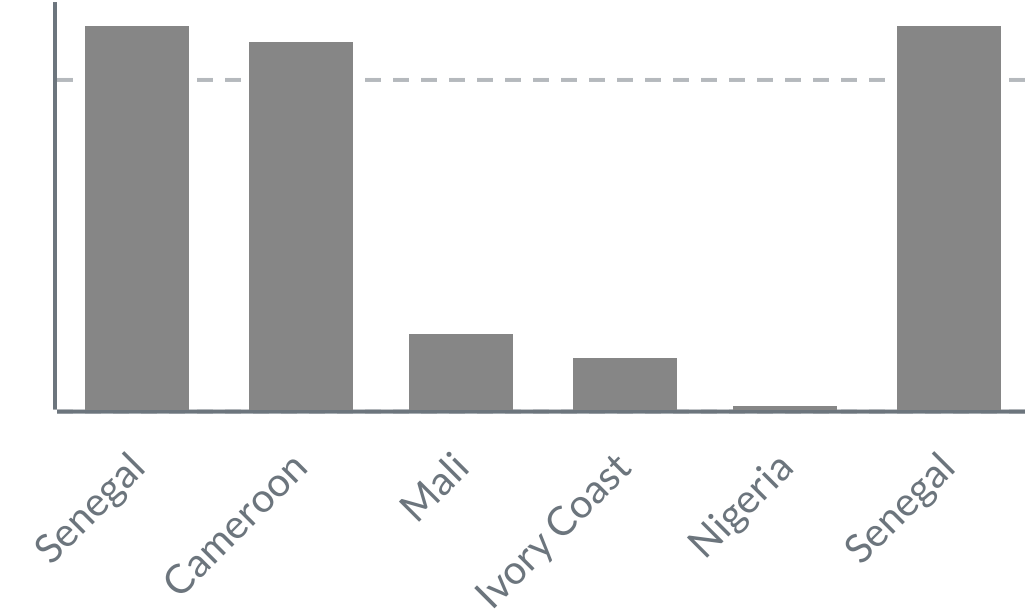


The most costly products to export to Ghana: transmission belts, non-alcoholic beverages, acrylic acid and framed glass mirrors



The per unit cost of transporting articles of glass (US\$4.71) to Mali, is higher than the cost of transporting glass articles to Ivory Coast (US\$2.41).

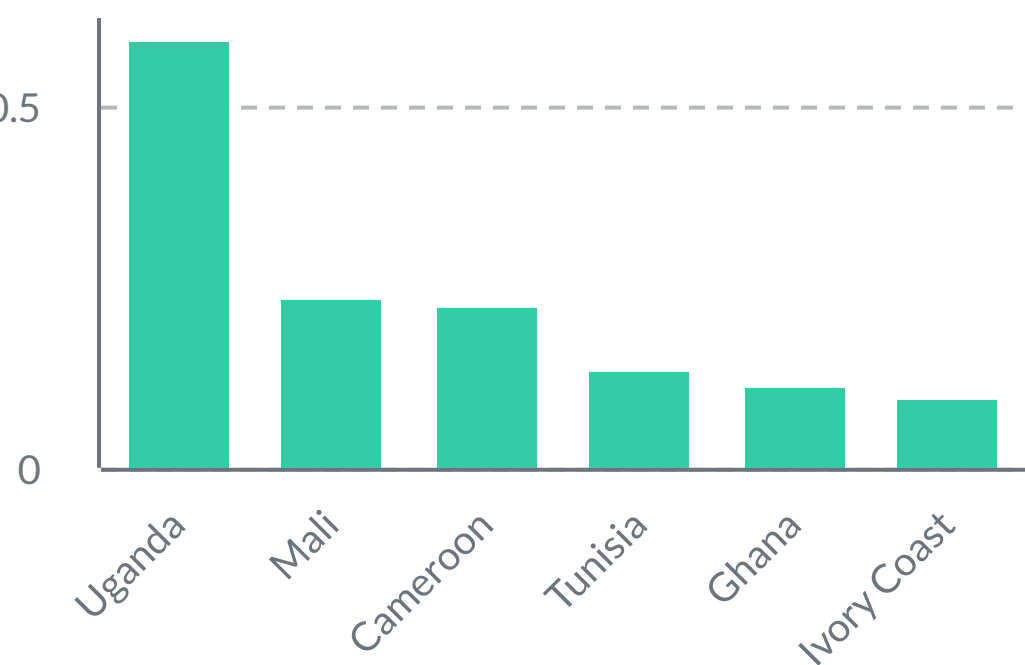
US\$ per unit road transport cost for fertilisers with 3 element of nitrogen



Transportation costs
The UNCTAD transport cost database measures the cost of bilateral transport by product. Transport cost is defined as the difference between the Cost, Insurance and Freight value and Free on Board value of goods. Transport cost across all modes of transport (road, rail, air, and sea) is included. The initial data is for 2016, but is in the process of being updated.

On average, road transportation of acyclic ketones is the most costly. Road transport to Ivory Coast is the highest due to the high cost of transporting acyclic ketones.

US\$ per unit road transport cost frozen fish n.e.s

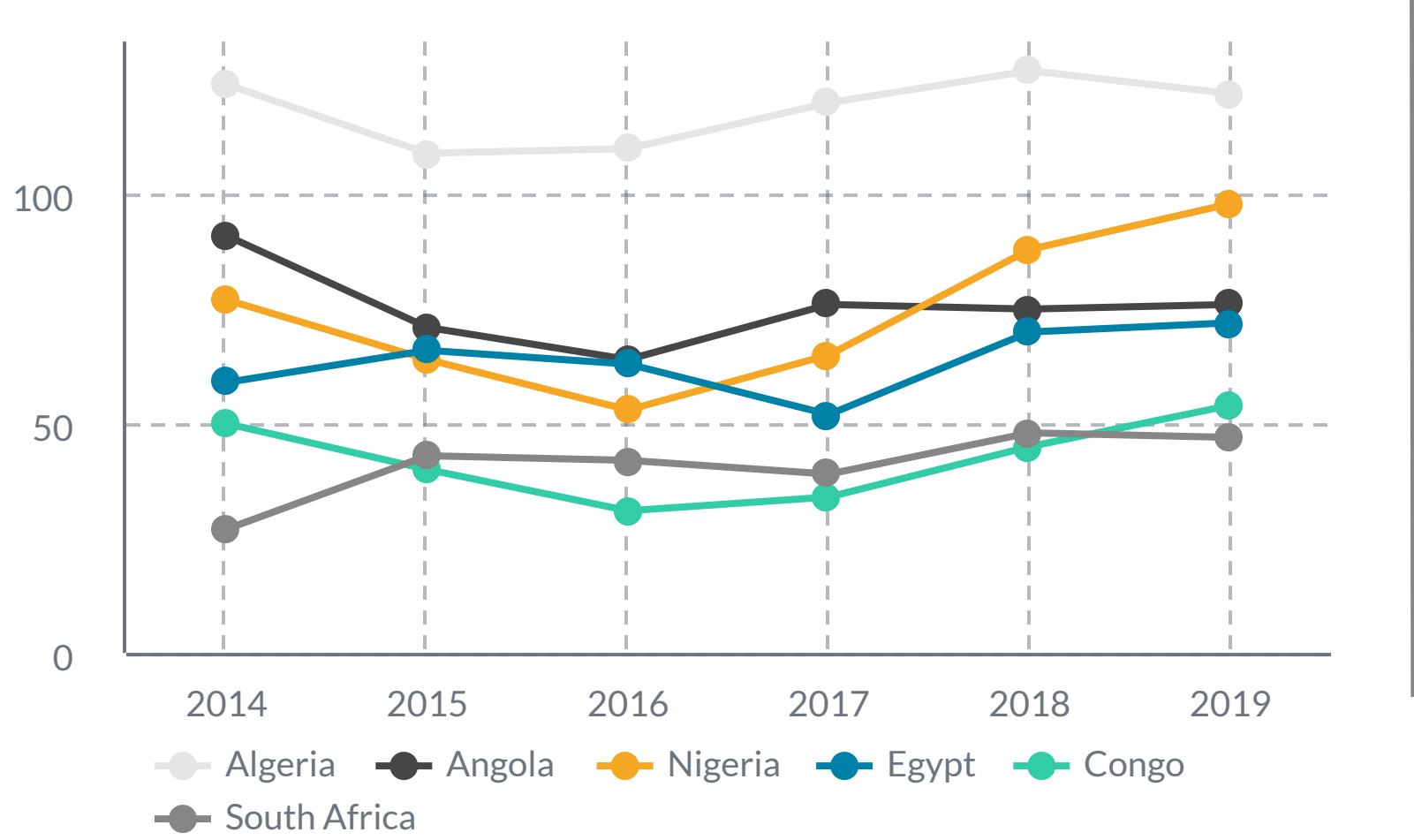


Trade in services

The WTO-OECD Balanced Trade in Services Dataset (BaTiS) is an experimental dataset which contains a complete, consistent and balanced matrix of international trade in services. Statistics cover the period 2005-2019, for over 200 reporters and partners, and 12 EBOPS 2010 categories in addition to total services.

Services exports 2014-2019

Commercial services (US\$ million)



Services imports 2019

Commercial services (US\$ million)

