

Exporters profile's Evolution in a decade (2011-2020) Case of Morocco

Use of international trade statistics' micro data
linked to business Directory statistics

hello!

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Moroccan exporters profile's Evolution

In March 2022, a study was published with the aim of analyzing international merchandise trade statistics in conjunction with business statistics to establish new indicators that would enable users to measure trade exchanges from various angles and perspectives.

Business Directory at Office des Changes

The "Business Directory at the Office des Changes" is a database that houses legal and economic information pertaining to businesses operating in Morocco.

Customs International trade micro-data

A database containing customs declarations for the export of goods from the period 2011 to 2020.

1. Business Directory at Office des Changes

Sources, contents and update



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The primary source of the Business Directory at the Office des Changes is the Central Trade Register maintained by the Moroccan Industrial and Commercial Property Office (public agency)

Primary source for Business Directory at OC (Central Trade Registry (CTR))

- The Central Trade Register collects and comprehensively documents all information pertaining to individuals or legal entities engaged in commercial activities or possessing a commercial structure. These individuals or entities are required to register and obtain a unique registration number for identification purposes.
- Its purpose is to disclose the presence, attributes, and future prospects of these commercial activity professionals, thereby providing information to third parties (accessible to anyone who requests it).
- The RTC (Registry of Trade and Commerce) furnishes legal information about enterprises that are registered in the Trade Register on a monthly basis.

Contents/characteristics

Identification informations

- Trade Register ID
- The Common Enterprise Identifier ID (ICE)

Biographic informations

- Names
- Adresses
- Cities

Stratification informations

- Social activity purpose (Non-codified) *as it appears in the statutes of the company (Not codified)*
- legal form

Economic informations

- company capital
- Sector
- turnover
- Other financial informations

Other sources for Business Directory at OC

Surveys feed-back

- More than 3,600 main enterprises involved in international trade, balance of payments and Investment transactions
- Add contacts (e-mails, téléphones, corresponding respondants, etc.)
- Very recent changes

Transactional micro-data

Custom's International trade micro-data

Enlarge the coverage to non registered units in the CTR

- Agricultural cooperative, also known as farmers' co-op
- Administrations
- Etc.

Banks' International Transactions Reporting System (ITRS)

Other sources

- Administrative data
- Private platforms specializing in commercial information on companies

Some indicators about characteristics of businesses

871,831

Number of enterprises (legal persons) up to July 31, 2023

94%

Of them have a turnover of less than 1 million USD

about 5,500

monthly average of new business creations over the last three years

Two thirds (66%)

Services related activities

2. International trade micro-data

*Preparation of the exporters database for the
study*

*Connection with the business directory and
definition of variables*

How are exporters identified in the international trade micro-data

ROYAUME DU MAROC - MINISTERE DE L'ECONOMIE ET DES FINANCES
ADMINISTRATION DES DOUANES ET IMPOTS INDIRECTS

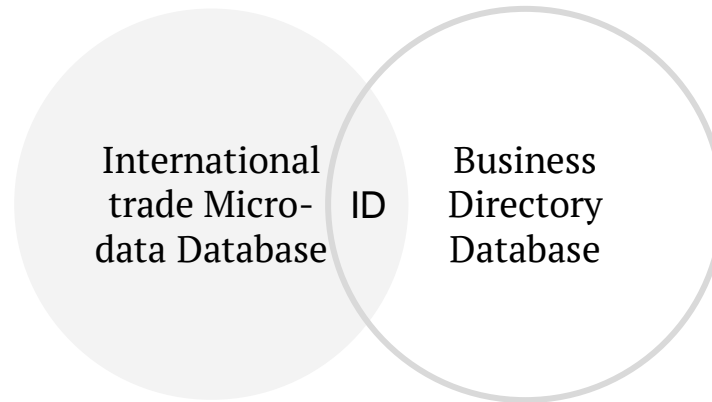
Enreg

2	Exportateur / Expéditeur	N° R. C. Centre R. C.	1
			3
			5
4	Importateur / Destinataire		9

MADE IN MOROCCO

- Exporters are identified by their trade register number,
- Possibility to connect the international trade database and the Business Directory Database using this Identifier

Databases connection



The exporters database preparation process for this study

Exclude occasional exporters whose annual export turnover was less than 100,000 USD over the entire study period

Assign each exporter its main exporting sector based on the National Accounting Classification (NAC) corresponding to the major product exported

Assign each exporter its main continent of export

Assign each exporter its size according to the export turnover

Definition of variables

1-ACTIVE EXPORTER

An active exporter, for a given year, refers to any exporter conducting an export operation during the respective year superior to 100,000 USD

An exporter's main continent during a given period refers to the continent to which the exporter exports the most during that period.

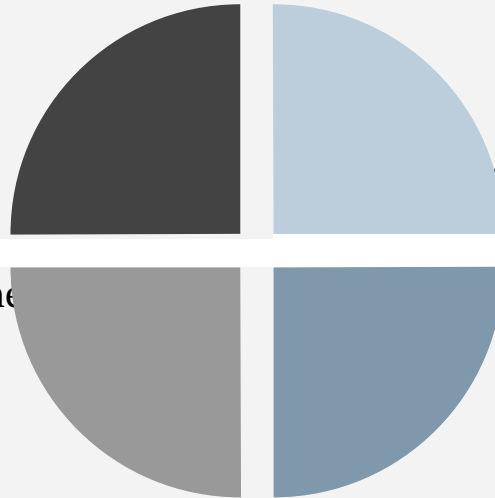
3-MAIN EXPORTER CONTINENT

2-MAIN EXPORTER SECTOR

The main activity sector is determined by considering the nature of the most exported product by the exporter during the given year and its correspondence with the National Accounting Classification (NAC).

The region of an exporter refers to the region to which belongs the city where the exporter is registered

4-EXPORTER'S REGION



Definition of variables

5-EXPORTER TURNOVER SIZE

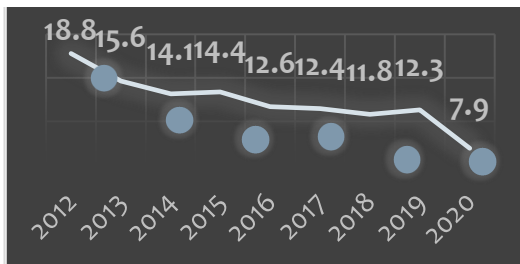
- The export turnover size to which each exporter belongs, for each year, is calculated based on the export value during the respective year.
- Six intervals have been established to rank the importance of each exporter in terms of exports.
- These sizes have been established to ensure better homogeneity in the distribution of exporters within a given turnover interval, with the aim of minimizing intra-interval variance (boxplots).
- In the case of this study, exporters have been categorized by their sizes as follows:
 - Very Small Exporter: Less than 2 MDH
 - Small Exporter: Between 2 and 10 MDH
 - Medium Exporter: Between 10 and 100 MDH
 - Big Exporter: Between 100 and 400 MDH
 - Very big Exporter: More than 400 MDH.

3. Some results:Export analysis from a new perspective

*Aspects of the evolution of Exporters profile
in a decade (2011-2020)*

Analysis of the appearances* of active exporters in percentage

Evolution of the apparition rate



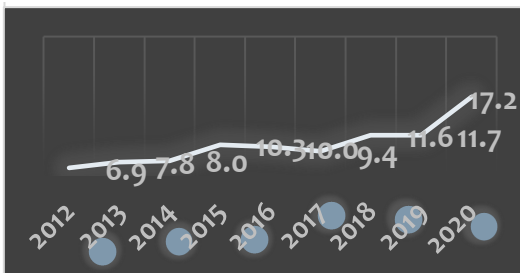
Source : Office des Changes

(* For the period of this study from 2011 to 2020, an "appearance" in year N refers to any exporter who records export activity in year N but had no export activity between 2011 and year N-1. The rate is calculated based on the number of such appearances in year N divided by the total number of active exporters in year N-1.

The analysis of the dynamics of the number of active exporters appearing in the period from 2012 to 2019 shows a decreasing trend in the number of newly appeared exporters, with an apparition rate declining from 18.8% in 2012 to 12.3% in 2019. During this period, the Casa-Settat region recorded the largest increase in active exporters (+1,895), followed by the Tanger-Tetouan-Al Hoceima region (+596), and then the Souss-Massa region (+526).

Analysis of the disappearances* of active exporters in percentage

Evolution of the disappearance rate



Source : Office des Changes

(* For the period of this study from 2011 to 2020, a "disappearance" in year N refers to any exporter who recorded export activity in year N-1 but had no export activity between year N and 2020. The disappearance rate is calculated based on the number of such disappearances in year N divided by the total number of active exporters in year N-1.

The analysis of the evolution of active exporters who disappeared during the period from 2011 to 2019 shows an increase in the number of disappearances over the years, with a disappearance rate rising from 6.9% in 2012 to 11.7% in 2019, representing an average annual growth rate of 11.9%. During this period, the Casa-Settat region recorded the most significant loss of active exporters (-1,683), followed by the Tanger-Tetouan-Al Hoceima region (-418), and then the Souss-Massa region (-370).

The evolution of performance of active exporters by the main destination continents



Evolution of
the Number

+2,7% (TCAM)

Turnover

+8,1% (TCAM)

+8,7 point (Part)



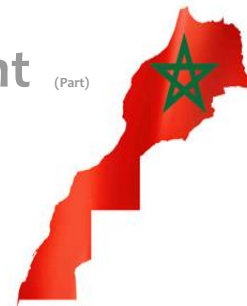
Evolution of
the Number

+6,5%
(TCAM)

Turnover

-11,2% (TCAM)

-18,6 point (Part)



Evolution of
the Number

+5,7% (TCAM)

Turnover

+6,6% (TCAM)

+0,1 point (Part)



Evolution of
the Number

+9,1% (TCAM)

Turnover

+16,2% (TCAM)

+9 point (Part)

Source : Office des Changes

In 2020, a year marked by the COVID-19 health crisis, the number of active exporters to all destination continents decreased, mainly those who exported to Europe (-4.3%).

The export turnover of active exporters whose main destinations were the America and Europe declined by -64.9% and -8.8% respectively.

However, export turnover of active exporters who exported to Asia and Africa increase with 31 billion DH and 2 billion DH respectively.

The evolution of performance of active exporters by region

2011 : 262 AE for 6% of export turnover
 2019 : 322 AE for 9,8% of export turnover
 2020 : 320 AE for 11,4% of export turnover

2011 : 494 AE for 17,5% of export turnover
 2019 : 687 AE for 28,5% of export turnover
 2020 : 672 AE for 26,1% of export turnover

2011 : 1.506 AE for 60,3% of export turnover
 2019 : 1.822 AE for 44,6% of export turnover
 2020 : 1.718 AE for 43,9% of export turnover

2011 : 268 AE for 5,9% of export turnover
 2019 : 449 AE for 6,5% of export turnover
 2020 : 424 AE for 7,2% of export turnover

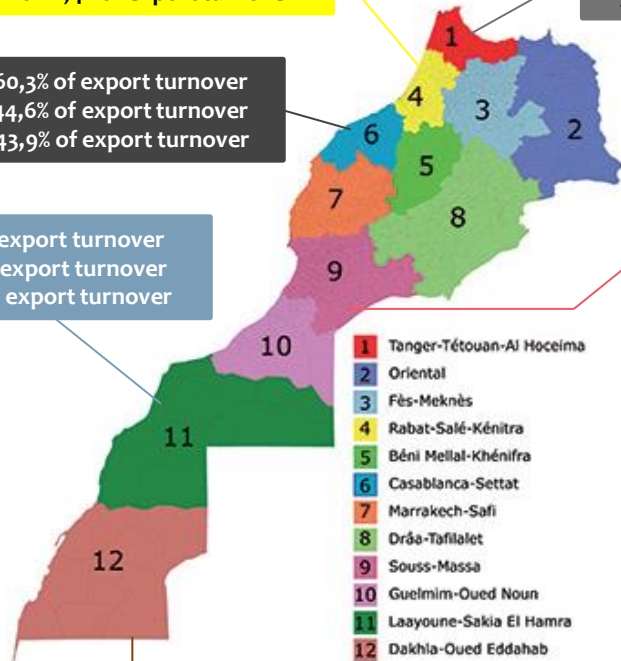
2011 : 84 AE for 1,2% of export turnover
 2019 : 135 AE for 1,9% of export turnover
 2020 : 130 AE for 1,8% of export turnover

In 2019, 89.4% of the export turnover came from the regions CASA-SETTAT, TANGER-TETOUAN-ALHOCEIMA, RABAT-SALE-KENITRA, and SOUSS-MASSA (89.7% in 2011). In terms of the number of active exporters, 76.1% were registered in these four regions in 2019, compared to 78.4% in 2011.

During the period from 2011 to 2019, active exporters based in the TANGER-TETOUAN-ALHOCEIMA region and those in the RABAT-SALE-KENITRA region showed the highest growth in export turnover, with an average annual growth rate of 13% each. They were followed by exporters located in the LAAYOUNE-SAKIA EL HAMRA region with an average annual growth rate of 12.5%.

In parallel, the DAKHLA-OUED EDDAHAB region recorded the highest increase in the number of active exporters based in that region, with an average annual growth rate of 8.7%.

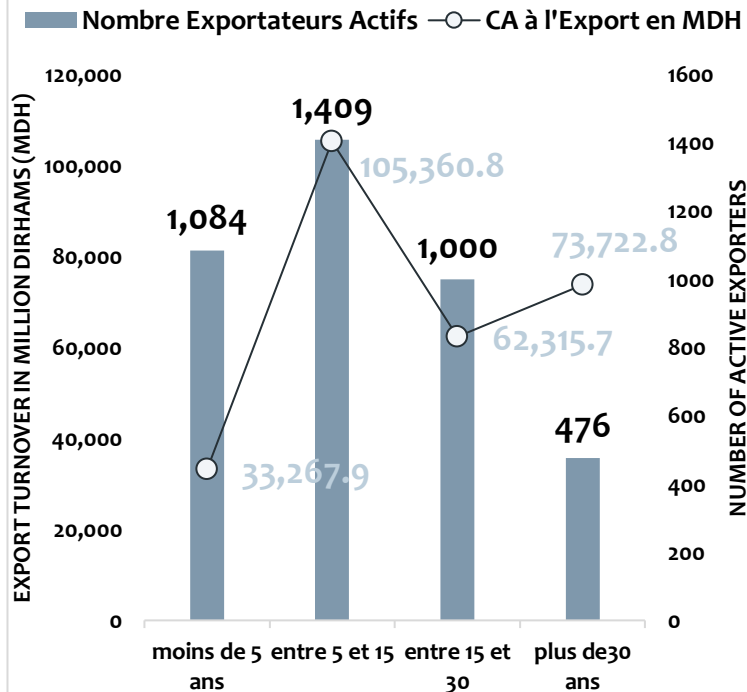
In 2020, a year marked by the effects of the COVID-19 crisis, active exporters in the TANGER-TETOUAN-ALHOCEIMA region were the most impacted in terms of export turnover (-15.1% compared to 2019). In terms of the number of exporters, the CASA-SETTAT region experienced the largest decline, with 104 active exporters fewer than in the previous year.



2011 : 74 AE for 1,2% of export turnover
 2019 : 144 AE for 1,6% of export turnover
 2020 : 149 AE for 2,2% of export turnover

Analysis of the active exporter population by Age (Year of creation)

Active exporters in 2019 by Age (Year of creation)



Source : Office des Changes

The analysis of active exporters reveals a dominance of active exporters in the 5-15 years age group, in terms of both the number and export turnover part.

In fact, in 2019, 37.3% of the export turnover of active exporters was achieved by those aged between 5 and 15 years, followed by those aged over 30 years (26.1% part), and then those aged between 15 and 30 years (22.1% part).

The "Young Active Exporters" aged less than 5 years, achieved an export turnover of 33.3 billion DH in 2019, or 11.8% of the total export turnover of active exporters.

In terms of the number of active exporters, 1,409 belong to the 5-15 years age group, followed by the "Young Active Exporters" (1,084), and then those in the 15-30 years age group (1,000).

Active exporters in the +30 years age group represent 11% of the total number of active exporters.

two-dimensional crossing of variables

*Exporter Size vs.
Continent*

*Exporter Size vs.
Sector*

*Exporter Size vs.
Region*

*Continent vs.
Sector*

*Continent vs.
Region*

*Region vs.
Sector*

Thank you!

You can download the study on this pages:

Links

▣ Study (french):

<https://www.oc.gov.ma/sites/default/files/2022-03/Etude%20-%20Analyse%20multidimensionnelle%20du%20profil%20des%20exportateurs%20marocains%20actifs%20WORD.pdf>

▣ Abstract (french):

https://www.oc.gov.ma/sites/default/files/2022-03/Etude%20-%20Analyse%20multidimensionnelle%20du%20profil%20des%20exportateurs%20marocains%20actifs%20PPT_0.pdf