



✦ **India Global Connect** ✦  
**Business Networking Meet - India-Morocco**  
**20<sup>th</sup> May 2021**



**...Collaboration Possibilities**

**Gem and Jewellery Export Promotion Council (GJEPC)**

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## Key Participants

H.E Mr. Rajesh Vaishnaw	Indian Ambassador to the Kingdom of Morocco
Mr. Suresh Kumar	Joint Secretary, MOC&I, Government of India
Mr. G.K Pant	First Secretary (Commerce), Embassy of India, Morocco
Mr. Khalid Rahil	Director of Heritage Preservation
Mr. El Hazzaz Driss	President of the Moroccan Jewellers Federation

## Panelists from Morocco

Mr. Mohammed Majid Lahrichi	General Secretary of the Moroccan Jewellers Federation
Ms. Laila Miyara	2 <sup>nd</sup> Vice - President of the Moroccan Jewellers Federation
Mr. Ahmed Lablidi	Design office to develop the study program for jewellers technicians
Mr. Azeddine Mastari	Training Committee of the Moroccan Jewellers Federation
Mr. Hicham Agouramen	Member of the Moroccan Jewellers Federation
Ms. Amal Bekkali	Member of the Moroccan Jewellers Federation

## Panelists from India

Mr. Colin Shah	Chairman, GJEPC
Mr. Sanjay Shah	Convener, DPC Panel
Mr. K Srinivasan	Convener, Jewellery Panel
Mr. Mansukh Kothari	Convener, Events
Mr. Vijay Kedia	Convener, Colour Gemstones Panel
Mr. Ram Babu Gupta	Convener, Silver Panel
Mr. Chirag Jain	J Saloni Jewellers
Mr. Pradeep Sanghavi	Yash Jewels
Mr. Kaushik Kevdiya	Arrow Star
Ms. Sushil Jain	Dialmaz Exports
Mr. Sabyasachi Ray	Executive Director, GJEPC (Moderator)



**His Excellency Rajesh Vaishnaw, Indian Ambassador to the Kingdom of Morocco,** said, "India has been adding modern techniques with traditional know-how to bring it more in tune with the global market. Similarly, Morocco has been a jewellery powerhouse for many years, and the combination of a low-cost and highly skilled workforce has made it a hub for the jewellery trade. Both countries can benefit tremendously by cooperating, collaborating, and exchanging ideas and expertise. Today's webinar is a first step towards the same."

**Suresh Kumar, Joint Secretary, MoC&I,** commented, "India Global Connect with Morocco should explore new avenues of trade and also try to understand consumer preferences to enhance the trade between the two countries. India and Morocco have enjoyed cordial and friendly relations and over the years the bilateral relations have witnessed significant depth and growth. However, the gem and jewellery trade between the two countries is insignificant, and we should work together to achieve \$150 million trade in this sector."

**Colin Shah, Chairman, GJEPC** said, that Exports/imports of gems and jewellery between the two countries is negligible and needs to be increased, which can enable India and Morocco to further developing their businesses and economy in terms of production, employment, new methods, techniques, etc. We should collaborate for skilling/training. I am happy that we had a very insightful and meaningful discussion today. He added that there is a need to improve bilateral trade and investment and strengthen B2B linkages between the two countries by exploration of investment opportunities and participating in trade shows and events

**Mansukh Kothari,** Convener, Events, GJEPC added, "For any trade to flourish, it is important that there is constant engagement between manufacturers and buyers. Considering the current scenario, a series of Buyer-Seller meets and interaction through virtual platforms should be explored. I welcome Moroccan traders to visit our flagship shows IIJS Premiere and IIJS Signature, where they can engage with manufacturers for fulfilling their sourcing needs."



## 1.1 India -Morocco Gems and Jewellery Trade: A Brief Glance

The total merchandise trade between the two countries in 2019 - 2020 stood at around US\$ 1.75 billion. Some of the major export commodities from India to Morocco include mineral fuels, nuclear reactors and boilers, pharmaceutical products, road vehicles and parts and electrical machinery while India majorly imports inorganic chemicals, salt, sulphur, fertilisers, iron and steel and aluminium articles from Morocco.

India -Morocco bilateral pertaining to the gems and jewellery commodities is registered at US\$ 0.56 million in 2019-20 which is not much significant. Cut and Polished Diamonds, Coloured Gemstones, Imitation Jewellery are the key gems and jewellery commodities which are exported to Morocco while India imports majorly rough gemstones from Morocco.



**Table 1: India-Morocco Gems and Jewellery Trade - 2019-20**

Particulars	Amount ( US\$ million)	Key export/import commodities
India's exports to Morocco	0.37	<ul style="list-style-type: none"> <li>• Cut and Polished Diamonds</li> <li>• Imitation Jewellery</li> <li>• Coloured Gemstones</li> </ul>
India's imports from Morocco	0.19	<ul style="list-style-type: none"> <li>• Rough Coloured Gemstones</li> </ul>
India-Morocco Total trade	0.56	

Source: DGCI&S

## 1.2 Morocco's key Gems and Jewellery imports from the World and India-2019



Morocco's total imports of gems and jewellery commodities from the world are valued at US \$ 122.6 million which majorly consist of Gold Jewellery, Cut and Polished Diamonds, Silver Jewellery, and Imitation Jewellery in 2019. The gold jewellery and silver jewellery together comprise more than 50 % of Morocco's total imports of gems and jewellery commodities from the world.

However, the share of India in Morocco's total imports of gems and jewellery commodities from India is less than 2 % in 2019. The duty rates applicable for India in Morocco for the key gems and jewellery commodities stood at 2.5 %.

**Table 2: Morocco's Key G&J imports from World and India -2019 along with Tariff rates applicable in India**

HS Code	Commodity Description	Morocco's imports from the world (US \$ million)	Morocco's imports from India ( US\$ million)	India's % share in Morocco's imports and rank	Duty rates applicable for India in Morocco
71	Gems and Jewellery	122.6	2.1	1.7 % , 6 <sup>th</sup> rank	---
711319	Gold Jewellery	64.3	0.275	0.4 % , 11 <sup>th</sup> rank	2.5%
7117	Imitation Jewellery	10.3	0.248	2.4% , 4 <sup>th</sup> rank	2.5 %
711311	Silver Jewellery	5.7	0.348	6% , 5 <sup>th</sup> rank	2.5 %
710239	Cut and Polished diamonds	4.6	1.13	24.4% , 2 <sup>nd</sup> rank	2.5 %

Source: GJEPC analysis based on UN Comtrade Data, 2019 and World Tariff May 2021.

### 1.3 India - WANA gems and jewellery trade - 2019-20

This section analyses the gems and jewellery trade of India with the West Asia and North African region ( WANA) with special reference to Morocco which is a part of the said region

The West Asia and North African region (WANA) is one of the most important regions for India's export of gems and jewellery commodities. WANA region constitutes around 30 % of India's total exports of gems and jewellery commodities with an export value of US\$ 10.5 billion. India's imports of gems and jewellery commodities from the region stood at US\$ 8.93 billion while the total gems and jewellery trade is recorded at US\$ 19.52 billion (Table 3 )

**Table 3: India- WANA Gems and Jewellery Trade -2019-20**

Particulars	Amount ( US\$ million)
India's exports to WANA	10595.41
% of share in India's exports	29.36%
India's imports from WANA	8,930.82
% of share in India's imports	16.39%
India-WANA total trade	19,526.23
% of share in total trade	21.57%

Source: DGCI&S



## 1.4 India's Gems and Jewellery Exports with respect to Morocco



Within the WANA region, United Arab Emirates is the top export destination for India and constitutes around 89 % of India's total gems and jewellery exports with an export value of US\$ 9.4 billion. Israel, Qatar, Saudi Arabia, Bahrain, and Kuwait are the other significant export destinations of India's gems and jewellery commodities. India's exports to Morocco is not much significant with an export value of US\$ 0.37 million in the same period (Table 4)

**Table 4: Gems and Jewellery Trade within WANA - 2019-20**

Country	Exports (US \$ million)	% Share
United Arab Emirates	9433.84	89.04
Israel	914.17	8.63
Qatar	108.28	1.02
Saudi Arabia	55.55	0.52
Bahrain	35.66	0.34
Kuwait	27.22	0.26
Lebanon	9.93	0.09
Oman	4.25	0.04
Jordan	1.37	0.01
Egypt	2.55	0.02
Morocco	0.37	0.00
Sudan	2.09	0.02
Iraq	0.07	0.00
Tunisia	0.06	0.00
Yemen	0	0.00
Syria	0	0.00
South Sudan	0	0.00
<b>Total</b>	<b>10595.41</b>	<b>100</b>

Source: DGCI&S

## India Global Connect – Interactions and Key Take Away

Mr. Sabyasachi Ray, started the rounds of discussions with panellists; outcomes of which are briefly described here below:

### A. Gem and Jewellery products preferences and designs in Morocco

Moroccan Jewellery is an ancestral art that is cut, crafted, and improved upon by skilled craftsmen and artisans. The Moroccan women were initially attracted towards traditional and vintage jewellery like priced vintage gold articles set with rose-cut diamonds and precious pearls.

However, with globalization and increasing awareness of different gems and jewellery commodities available across the world the women are now open to more contemporary jewellery by major American and European brands and prefer products like precious, semi-precious stones and silver. The locals prefer 18-22 karat gold jewellery and gems and jewellery commodities that are refined and light in design.

**Ms. Laila Miyara, Moroccan Jewellers Federation**

Jewellery is one of the prized possessions of Moroccan women. Morocco has a unique blend of ancient traditional artisan jewellery as well as jewellery produced using modern methods of production and technology.

Moroccan consumers preferred locally made traditional, handmade jewellery for special occasions and for daily wear opt for more contemporary jewellery. They prefer both locally made jewellery as well as the imported jewellery from other countries.

**Ms. Amal Bekkali, Moroccan Jewellers Federation**



Moroccans prefer corals, diamonds, and coloured gemstones from India. There is a new trend in the Moroccan gems and jewellery sector that combines traditionally locally made jewellery with the new modern designs of jewellery available in the world.

**Mr. El Hazzaz Driss, President, Moroccan Jewellers Federation**

## Key Points

- Moroccans prefer both locally and imported jewellery
- There is a new trend in Morocco where the jewellery is a unique blend of traditional and modern designs
- The Tastes and Preferences of Moroccans have shifted from vintage jewellery to contemporary jewellery manufactured globally.
- Moroccans prefer gems and jewellery commodities like coloured gemstones, corals, and diamonds.

## B. Issues and constraints hindering gems and jewellery trade.

The Moroccans are not aware of the Indian gems and jewellery products and designs due to limited availability of Indian gems and jewellery products in the local market. They are more aware of European gems and jewellery products than the Asian market due to their close proximity to the region.

The gems and jewellery trade between the two countries can be improved by creating more awareness, marketing and communication of Indian Gems and Jewellery Products in the Moroccan Market.

**Ms. Laila Miyara, Moroccan Jewellers Federation**

There is an absence of Indian companies in Morocco to market Indian gems and jewellery products in the local market, unlike Turkey that has a large presence in the Moroccan market.

**Ms. Amal Bekkali, Moroccan Jewellers Federation**

## Key Points

- Lack of communication, awareness and marketing of Indian gems and jewellery products in Morocco
- The limited presence of Indian gems and jewellery firms/units in Morocco



### **C. Measures to enhance gems and jewellery trade between the countries**

Morocco is a gateway to Africa and can serve as a point of entry of Indian gems and jewellery products to African countries. There is a need to share insight and knowledge so that both countries are more aware of each other's gems and jewellery market. There can be collaboration possibilities in areas of sharing technology and machinery required in the manufacturing of gems and jewellery products since Morocco majorly imports these types of machinery from Turkey, Italy, and Germany.

He also invited Indian gems and jewellery companies to set up factories and manufacturing units in Morocco since the region is rich in coloured gemstones that can be harnessed for producing finished gems and jewellery commodities.

There is a need to create more awareness about Indian gems and jewellery products in Morocco which can be reinforced through trade shows, events and arranging for travel arrangements for Moroccan gems and jewellery trade delegations in India.

Setting up of a joint committee along with a partnership between the two gems and jewellery federations by the signing of a memorandum of understanding (MOU) can be the way forward to boost the gems and jewellery trade between the two countries.

**Mr. Mohammed Majid Lahrichi, General Secretary, Moroccan Jewellers Federation**

India is producing customised jewellery that can be attuned to the tastes and preferences of the Moroccan cultures. India is currently manufacturing 14, 18 and 22 karat jewellery and is at par with any other manufacturing countries in the world. India is open to collaboration with Morocco in almost all areas of gems and jewellery sector ranging from transfer of technology, skilling, and investment.

**Mr. K Srinivasan, Convener, Jewellery Panel, India**

Assistance can be provided to Moroccan jewellers in terms of the transfer of technology, supply chain management and training to traders. He invited Moroccan jewellery delegations to visit gems and jewellery factories in India. India's skill institutes offer a variety of online and offline skill development courses and internships for the up-gradation of skills that can be used by Moroccans

**Mr. Sushil Jain, Dalmaz Exports, India**

The trade between the two countries can be enhanced by providing insights about investment opportunities and providing assistance and support in terms of procuring coloured gemstones, machinery, stones, and polished diamonds, among others. The Moroccan government is renowned for inviting investment opportunities in the country as the region serves as a strategic hub for connecting Africa with Europe. There need to be more exchanges, meetings, and events between the two countries.

The list of Indian participants and gems and jewellery factory owners who deal in machinery and cutting of gemstones and other commodities can be shared with the Moroccan side to create a WhatsApp group of Indian and Moroccan gems and jewellery manufacturers to ensure dialogue and partnership between the manufacturers, associations, and federations.

**Ms. Amal Bekkali, Moroccan Jewellers Federation**

### Key Points

- There is a large potential for collaboration between the two countries in terms of transfer of technology, machinery, manufacturing, and skill.
- A joint committee must be set up to explore the gems and jewellery trade between the countries
- There needs to be more exchanges, discussions, events, and meetings to improve the partnership between the two countries
- Signing of Memorandum of Understanding (MOUs) between the two federations can be a win-win situation for strengthening trade between the countries.
- Invitation to Moroccan jewellery delegations to visit Indian gems and jewellery factories.
- Arranging travel arrangements for Moroccan gems and jewellery trade delegations in India.
- Availability of online and offline skill development courses and internships by India's skill institutes Moroccans.



## D. The Duty structure and sourcing partners of Morocco

Morocco is a party to the 'The International Temporary Exportation for Outward Processing' procedure under which goods may be temporarily exported for manufacturing, processing or repair abroad and then reimported with total or partial exemption from import duties and taxes. Morocco is importing huge quantity of gems and jewellery products from Turkey and China.

**Ms. Amal Bekkali, Moroccan Jewellers Federation**

### Key Points

- Turkey and China are the major sourcing partners of Morocco.
- Morocco is a party to 'The International Temporary Exportation for Outward Processing' custom procedure

## E. The Overview and unique selling point of Indian Gems and Jewellery Products and the possibility of collaboration

Earlier India was exporting diamonds, coloured gemstones, gold jewellery and other types of jewellery products to the world that was majorly handmade jewellery fabricated by skilled artisans. Nowadays, India has adopted all available techniques of manufacturing, technology and production of gems and jewellery commodities that include casting, stamping, CAD, CAM, etc.

In terms of standardization, Indian jewellery conforms to various quality standards pertaining to the environment and occupational health and safety standard of workers and is also a member of the Responsible Jewellery Council.

**Mr. K Srinivasan, Convener, Jewellery Panel, India**

India not only has a very rich tradition and cultural heritage in the production of traditional handmade jewellery but also engage in manufacturing high-quality mass-produced jewellery for daily use. India offers high-quality gems and jewellery commodities in terms of design, finishing and timely commitment and provides a unique combination of 18 karat handmade and machine-made jewellery products.

**Mr. Sushil Jain, Dialmaz Exports, India**



### a) Diamond Sector in India

India occupies a dominant position in the manufacturing, production, and exports of Natural Diamonds with annual exports of US\$ 12 billion. The Lab-grown diamonds and natural diamonds must be segregated and considered as two separate markets. The certification of diamonds is the key component in exporting diamonds and Indian diamonds are certified and graded by reputed international third-party countries as per the needs of international customers.

Lab-grown diamonds over the last two years has become a mainstream product in the gems and jewellery sector and both lab-grown diamonds and natural diamonds are competing for the same customer which has led to huge growth in the diamond sector.

The lab-grown diamonds are usually produced using two techniques namely chemical vapour disposition and High-pressure high temperature. Currently, China is the leading producer of lab-grown diamonds and produces 60 % of the total lab-grown diamonds in the world while India produces 15 % of the total lab-grown diamonds in the world.

**Mr. Sanjay Shah, Convener, DPC, India**

### b) Coloured Gemstones in India

India is one of the largest processors for cutting and polishing-coloured gemstones in the world. India imports a wide variety of coloured gemstones like Tanzanite, Amethyst, emeralds from countries across the world – Brazil, Zambia, Zimbabwe, Ethiopia. India is a manufacturing hub that specializes in the processing of rough coloured gemstones into finished products due to the presence of highly skilled labour in the country



Morocco engages in the production and manufacturing of coral stones that have a huge demand in India both in the local market and in the export market. The government of Morocco could provide incentives to India to increase India's imports of rough coral stones from the country.

There should be exchanges between the two countries in the form of trade delegations to collaborate in the areas of manufacturing and production of corals. India also specialized in the production of emeralds and other types of coloured gemstones which can be exported to Morocco for improving the gems and jewellery trade between the two countries.

**Mr. Vijay Kedia, Convener, Coloured Gemstones Panel, India**

### c) Silver Jewellery in India

India specializes in handmade silver jewellery that is set with real stones, unlike other countries that incorporate imitation stones. The gems and jewellery trade between the two countries is not much significant and can be strengthened through better dissemination of information ( duty structure for silver jewellery in Morocco). There is a huge potential for both countries to boost exports pertaining to the gems and jewellery sector.

**Mr. Ram Babu Gupta, Convener, Silver Panel, India**

#### Key Points

- India is proficient in manufacturing both handmade traditional jewellery and machine-made jewellery using modern techniques of production and technology
- Indian jewellery follows all kinds of standardization and certification
- The outlook of the diamond industry in India including lab-grown diamonds is quite positive and is expected to grow further in the coming years
- The India - Morocco gems and jewellery trade can be boosted further by increasing India's Imports of corals from Morocco and exporting emeralds and other coloured gemstones to Morocco
- There is the potential of increasing India's exports of silver jewellery to Morocco by the provision of information and insight about Moroccan gems and jewellery market and duty structure.



## F. Collaboration possibilities with India's skilling institutes

There are three major courses of vocational education pertaining to the gems and jewellery sector in Morocco namely a) Metallurgy ( Study of metals like Gold, silver, platinum, copper, zinc, Rhodium, etc ) b) Modern and Contemporary jewellery techniques and c) Gemmology or gemstones study that involves classification, scientific identification, and grading of gems. Morocco is open to collaboration in the areas of transfer of technology and skilling artisans with India's skilling institutes.

**Mr. Azeddine Mastari, Training Committee, Moroccan Jewellers Federation**

### Key Points

- There is the possibility of collaboration with India's skilling institute for sharing of manufacturing skills and technology with Moroccan jewellers and artisans

### Conclusions

Mr. Ray concluded the meet by highlighting key insights gained from the interactions. He narrated that there is a great scope for enhancing bilateral trade relations between the two countries.

- There is substantial demand for coloured gemstones, corals, and diamonds in Morocco
- The market trend in Morocco is shifting from traditional locally made jewellery to modern designs and types of jewellery manufactured abroad
- Moroccans prefer both locally made and imported jewellery products
- Moroccan jewellery combines a unique blend of traditional and modern design of jewellery.
- Turkey and China are the major sourcing partners of Morocco.
- Morocco is a party to 'The International Temporary Exportation for Outward Processing' custom procedure
- Lack of marketing and awareness of Indian gems and jewellery products and limited presence of Indian companies in Morocco are some of the major factors inhibiting the trade between the two countries.



### **Collaboration Possibilities**

- There is the possibility of collaboration in almost all areas ranging from transfer of technology, skill, manufacturing, and machinery between the two countries
- Signing of a Memorandum of Understanding (MOU) between the two gems and jewellery federations can be a way forward.
- Morocco is open to collaboration with India's skill institutes in the area of skilling artisans
- India is a leading producer of coloured gemstones, silver jewellery and diamonds and produces high quality, well-certified, low prices, and customised gems and jewellery products using both traditional and modern techniques of production of gems and jewellery commodities
- Invitation to Moroccan jewellery delegations to visit Indian gems and jewellery factories.
- Arranging travel arrangements for Moroccan gems and jewellery trade delegations in India.
- Availability of online and offline skill development courses and internships by India's skill institutes Moroccans.
- Creation of WhatsApp group of Indian and Moroccan gems and jewellery manufacturers, traders, and associations.



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