

AGENCY FOR AGRICULTURAL DEVELOPMENT

INVESTOR'S GUIDE

IN THE AGRICULTURAL SECTOR IN MOROCCO



المملكة المغربية
Royaume du Maroc



وزارة الفلاحة والصيد البحري
Ministère de l'Agriculture et de la Pêche Maritime







Introduction

Located on the southern shore of the Mediterranean, on the northwestern tip of Africa and at the gates of Europe, on the western edge of the Arab and Muslim world and the Maghreb, the Kingdom of Morocco has always been a crossroads of civilizations and today an intersection of major regional groupings.

Due to its historical choice of the openness to its environment and its willingness to continue to work for a better world, Morocco has accelerated the pace of implementation of structural projects and, by drawing on its liberal orientation, has pursued its modernization at the political, economic and social levels and thus strengthening the stability of the country.

Morocco has in fact undertaken a series of structural reforms in order to achieve strong and sustainable growth. Coupled with the progressive liberalization of all sectors of activity, these reforms have had positive results on the national economy.

- Liberalization of the financial sector and restructuring of public finances;
 - Implementation of several sectoral development strategies that set specific goals of the different sectors and outline them in action plans and performance contracts: Tourism (VISION 200), Commerce (RAWAJ PLAN) New Information and Communication Technologies (DIGITAL MOROCCO PLAN), Energy (NATIONAL ENERGY EFFICIENCY PROGRAM), Industry (EMERGENCY PLAN 200), Fisheries (HALIEUTIS) and Agriculture (GREEN MOROCCO PLAN);
 - Improving the economic infrastructure: Megaprojects involving highways, railways, seaports and airports;
 - Supporting these projects with appropriate macroeconomic policy reform: Debt reduction, maintenance of macro equilibrium, trade liberalization, taxation adequacy, etc.
- Among the main sectors of activity, agricultural and

agro-industrial sector has undeniable advantages making Morocco one of the most attractive countries in terms of investment in the region.

In this context, Morocco has made considerable efforts to improve the investment environment in this sector particularly in the context of the Green Morocco Plan by improving the framework conditions and the modernization of institutional, legislative and regulatory systems regulating the economic activity and strengthening the attractiveness of the Kingdom to domestic and foreign investors.

Launched in 2008, the Green Morocco Plan has put the investment at the core of its equation of development and modernization of this sector, and this through triggering a wave of massive investment, around new domestic and international investors operating in the sector, with investments created around private projects or win-win aggregations through specific and adapted Morocco Offer.

This investor guide in the agricultural sector highlights the advantages and potentials Morocco offers to investors and project owners in the agricultural, agro-industrial and para-agricultural fields, the different aspects that characterize the business climate as well as the framework conditions and the new developments of the reforms undertaken within the framework of the Green Morocco Plan.



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SOCIAL AND ECONOMIC CONTEXT



Morocco in Brief

Located at the far northwest of the African continent and 14 kilometres away from Europe by the Strait of Gibraltar, the Kingdom of Morocco is a privileged crossroads between Africa, Europe and the Arab world.

Covering an area of 710850 square kilometres, Morocco opens onto both the Atlantic to the west, with 2934 km of coastline, and the Mediterranean Sea to the north with 52 km of coastline. This vast territory is bordered to the east with Algeria and to the south with Mauritania.

This exceptional geographic location gives Morocco a role of a strategic platform, at both the politico-economic and cultural levels.



Fact sheet on the Kingdom of Morocco

Official name	Kingdom of Morocco
Capital	Rabat
Location	North Africa, 14 km away from Europe
Political system	Social, parliamentary, Democratic and constitutional monarchy
Head of State	His Majesty the king Mohammed VI (20th king of the Alawite dynasty)
Currency	Moroccan dirham (MAD)
Average exchange rate in March 2011	euro = 10,789 MAD 1\$ US = 9,798 MAD
Macro-economic data in 2014:	<ul style="list-style-type: none">• GDP : 872791 MMAD• Distribution of GDP by sector of activity : Primary sector : 15%, secondary sector: 26% et tertiary sector: 59%• GDP Growth : 4.4%• Gross National disposable Income: 921953 MMAD• Inflation rate : 1.9%• Imports of goods and services: 408 998 MMAD• Exports of goods and services: 293 670 MMAD• Investment rate (GFCF (*) / GDP): 34.2%.• National Savings Rate: 26.6%.
demographic data (Forecasts):	<ul style="list-style-type: none">• Population (January 2015) : 33 656 000 Inhabitants• Working population (2015) : 48.2%• Urban population (2015) : 55.2%• Life expectancy (2010) : 72 ans.
Official languages	• Arabic and Amazigh. Notwithstanding this, the official and administrative Documents are drawn up in Arabic and French
Secondary languages	French, Spanish and English
Official Religion	Sunni Islam The Moroccan constitution guarantees the free exercise of other religions
Time zone	GMT (GMT+1 : Summer time)
Climate Conditions	Mediterranean in the north, Atlantic in the west and the Saharan in the south, the climate differences are explained by the influence of various factors (geographical extent, sea, desert, continentality, Canary currents, watershed exposure ...)

The agricultural sector in figures

Agriculture is an important pillar of development in Morocco. Its economic and social weight, structuring association in rural areas, and the multiplicity of its functions including the economic, social, environmental and food related aspects, make it a natural development engine.

The importance of the agricultural sector is evidenced by its significant contribution to the formation of the national GDP (15% to 20%) and job creation (40%), particularly in rural areas where agriculture is the main employer (80%) and source of income (15 million farmers).

The food industry is one of the pillars of the economy with a production value of 10 billion MAD. It is the first sector of the domestic industry and one of the best development strengths of the country (30% of added value (5% of GDP) and 12% of permanent employment except canned fish).

- A significant contribution to the formation of GDP: 19%
- A major reservoir of employment: 40% of jobs and income source for 80% of rural population
- Foreign exchange earnings through exports: 18 billion euro representing 11% of the total value
- Balanced coverage of the requirements of food products: 10% for milk and meat, 10% for vegetable crops, 60% for cereals, 43% for sugar...
- A considerable Usable Agricultural Area: 87 million hectares of which 16 million hectares irrigated.
- A major hydro-agricultural infrastructure: 19 dams allowing mobilization of 175 billion M3 of water of which 14 billion for agricultural use.
- A diversified agricultural production: 1 Million hectares of olive, more than 265000 ha of vegetable crops, 11800 of citrus fruits, 25 million head of which 75% of sheep.



Macroeconomic environment

Working continuously on the improvement of the quality of its macroeconomic environment, Morocco has engaged for decades into a vast reform process and a dynamics of continuous improvement particularly with regard to its political, social and economic aspects.

At the political level, the amendments made to the constitution confirm the conviction of the political leaders and their choice of democratizing the institutions and working on the political and social development of the country. In this regard, Morocco has experienced since independence, six constitutions promulgated respectively in 192, 190, 192, 192, 196 and 201. The latter is rightly considered as the means to initiate a great democratic turn.

The social aspect has also experienced many changes that have been accelerated since the 200s to improve the living conditions of the population. Thus, beyond the successive reforms of the social security system in Morocco, an ambitious revision of the Family Code was made. The human development has gained, since 205, new momentum through the National Initiative for Human Development (INDH).

The fight against poverty, instability and insecurity has also been initiated. The funds allocated to the social sectors have consistently increased and an increase of social expenditures was recorded in recent years.

The government has sought, in the field of health, to improve the situation by expanding health care supply while tackling the problematic health aspects. In addition, the Mandatory Health Insurance (AMO) has been made mandatory for the benefit of the private sector workers and the Health Insurance Plan for Economically Deprived (RAMED) was generalized.

Education has, in turn, been subject to the reform governed by the «Charter for Education - Training» that aims to improve the quality and coverage of education and training, and generalize education.

Finally, regarding the economic aspect, Morocco has worked on stabilizing its macroeconomic framework, improving the business environment, strengthening the competitiveness of the productive system of the country and launching ambitious programs to develop the infrastructure and stimulate the promising sectors.

In this context, a commercial code was introduced in 196 and has continued since to integrate macroeconomic changes experienced by the country. This was accompanied by other structural reforms such as those on corporate law, freedom of pricing and competition and consumer protection.

Moreover, financial market liberalization was undertaken in stages: unblocking of credits, institution of partial convertibility of the dirham, modernization of the banking sector and the financial market, creation of Casablanca Finance City (CFC). The latter project aims to position Casablanca and through it Morocco as a hub of finance at regional and continental level.

Morocco has also conducted successfully a program of control of foreign debt and actively worked to strengthen private investment, including the attraction of foreign direct investment which was part of a perspective of boosting its economic fabric and strengthening its ties with key partners.

For the attraction of domestic and international investors, the strengths of the country are multiple and complementary:

- **Competitive costs:** the country is a competitive export platform by, among others, cost of wages and other factors of production, export costs and tax charges.

- **Stable economic fundamentals:** they are the result of the macroeconomic policies conducted that promote a steady growth, control of inflation and development of public debt...

- **A privileged access to a strong consumer market:** With free trade agreements entered into and accession to the WTO, Morocco offers investors an access to a market of nearly 60 countries, including those referred to below, representing more than one billion consumers and 60% of global GDP: European Union (EU), United States of America (USA), Turkey, Arab countries ...

- **Infrastructures meeting the international standards:** The country has major infrastructures: major ports, including Tangier-Mediterranean, large national motorway network, good coverage by international airports, multitude of fully developed areas of economic activities, reliable system of telecommunications ...

- **Qualified and high performance human resources:**

Morocco has a human capital which constitutes a major asset in the service of competitive investment and the creation of added value: young and active population, suitable levels of training, cultural awareness, proficiency of language and new technologies, commitment to entrepreneurship, adaptability to changes in activities and competitive labour costs.

- Increasingly facilitated investments: Morocco has introduced a series of measures to strengthen competition and to encourage investment: simplification of procedures for businesses, strengthening the business law, financial market development, creation of structures of regulation and control and strengthening the competitiveness of domestic economic operators.

Finally, the sectoral strategies developed by Morocco properly illustrate its ability to successfully achieve reforms and control its development. Given their importance, those adopted at the economic level are discussed below.



NATIONAL PACT FOR INDUSTRIAL EMERGENCE (NPIE)

NPIE aims at strengthening and revitalizing the Moroccan industrial fabric and developing new sectors referred to as the 'Morocco's Global Jobs', for which the country has competitive advantages. In this context, the objectives set for 205 are as follows:

- To create 220 000 direct jobs and partially reduce urban unemployment;
- To increase the industrial GDP of 50 billion MAD;
- To generate additional export volume of 95 billion MAD;
- Increasing private investment of nearly 50 billion MAD, excluding those related to Integrated Industrial Platforms.

To do this, NPIE was built around the following pillars:

- Development of Morocco's Global Jobs: textiles and leather, food processing, offshoring, electronics, automotive, aerospace;
- Establishing Integrated Industrial Platforms to accommodate investments;
- Improving the competitiveness of SMEs / SMIs;
- Matching training with industry needs;
- Improving the business climate;
- Setting up the Moroccan Agency for the Investment Development (AMDI), as a body dedicated to the promotion and development of investments.

RAWAJ-VISION 200 PLAN FOR THE DOMESTIC TRADE

The Rawaj-Vision 200 program aims to develop domestic trade (supermarkets and hypermarkets, convenience stores, wholesale markets ...) with a view to improving the conditions of supplying the Moroccan citizen and living standards of merchants, increasing the contribution of this sector to the national GDP and creating new job opportunities. It has set as goals up to 200 to bring the contribution of domestic trade to

national GDP to 15%, against 11% for 206 and create over 450 000 jobs. Its implementation is classified in three specific areas:

- rebalancing of the commercial network by fostering business adaptation to the typologies of territories and encouraging new forms of distribution;
- Increasing the attractiveness of the activity through the modernization of convenience stores and commercial animation;
- Improving the quality and diversity of products by making an offer adapted to the needs of all consumers.

Transversal plans were also adopted. They relate mainly to the animation of Internal Trade, Surveillance, improving the overall business environment, organization of professional representation, supporting the interprofessional organizations and strengthening consumer protection and information.

«MOROCCO EXPORT» PLUS' STRATEGY FOR THE PROMOTION OF THE FOREIGN TRADE

Initiated in 209, the strategy 'Morocco export plus' aims at developing and promoting the foreign trade. It thus works to revitalize exports, preserve external financial balances and make gains from trade. The main objective is to double the volume of exports of goods and services, excluding phosphates and Tourism, by the year 205 and to triple them by 208.

To achieve these objectives, the strategy is based on three complementary levers:

- The targeting of priority sectors and products of which the offer is available and then those from the sectoral plans, along with the development of the latter;
- The targeting of the short-term priority markets in order to consolidate the country's position in its traditional markets and the diversification towards new markets with high growth potential;
- The support of companies so as to develop internationally depending upon their ability to export.



NATIONAL ENERGY STRATEGY

National energy strategy aims to establish in 200 a major electricity generation capacity from renewable energy sources, particularly solar and wind energies. It comes in four key areas:

- Security of supply and availability of energy;
- Widespread access to energy at reasonable prices;
- Control of demand;
- The preservation of the environment.

The achievement of the so-called strategy is based on four complementary pillars:

- A diversified and optimized energy mix around reliable and competitive technology choices;
- The development of domestic energy resources by the rise of renewable energy;
- The exploitation of national energy efficiency potential;
- External energy market integration.

EMERGENCE PLAN 200

The performance contract is to set a development framework comprising all industrial activities, including the so-called Offshoring activities. However it does not apply to industries related to seafood products and Chemistry-Parachemistry, which are covered elsewhere. However, transversal projects related to Enterprise Competitiveness concern the whole fabric of Moroccan companies, without exception (including tourism, public building and works sector, etc.).

This performance contract aims to specify the deployment program for industrial development strategy of Morocco on one hand, and to contractualize the reciprocal commitments of the state and the private sector on the other hand.

The performance contract revolves around three basic ideas:

- The absolute need to focus efforts of industrial recovery on the sectors for which Morocco has competitive advantages called « Morocco's Global Jobs», particularly the offshoring, automotive, aerospace, textiles and leather, electronics and agri-food, and this through dedicated development programs;
- The need to tackle the whole of the business fabric, without exception, through 4 major « Transversal Projects», set in a project to strengthen the competitiveness of SMEs, a project of business climate improvement, a project of Training and a plan of the development of new generation industrial parks, called «P2I - Integrated Industrial Platforms»;
- The need to establish an institutional organization capable of enabling the effective and efficient implementation of the programs.

The goal of the performance contract is to assign to the sector the general objectives:

- The creation of permanent industrial jobs and the reduction of urban unemployment;;
- The increase of the industrial GDP;
- The reduction of the trade deficit;
- Support for industrial investment, at both the domestic and foreign level;
- The contribution to land development policy.

HALIEUTIS PLAN IN THE FISHERIES SECTOR

The Halieutis Plan aims to make fisheries sector a sustainable growth driver for the national economy. The strategy adopted is based on three major axes:

1- Sustainability: To achieve a sustainable use of resources for their preservation for future generations and this through:

- Strengthening and sharing of scientific knowledge;
- Fisheries management on the basis of quotas;
- The adaptation and modernization of fishing effort;
- The development of aquaculture.

2- Performance: to reach a highest quality equipped and organized sector, from unloading to marketing, through:

- Development of infrastructure and unloading equipment;
- The construction and management of port fishing areas;
- Strengthening the attractiveness of the facilities built;
- The structuring and revitalization of the domestic market.

3- Competitiveness: having better valorised and competitive products on the most promising markets. This should arise from:

- The ease of manufacturers' access to raw materials;
- The orientation of the manufacturers towards the most promising markets;
- The creation of three competitiveness clusters around seafood products in the north, centre and south of the Kingdom.

VISION 2015 IN THE CRAFTS SECTOR

2015 vision targets the restructuring of the crafts sector and the emergence and development of a key network of producers. The goals set up on the long term are to seize the export potential with a focus on the close European markets, and develop sales to tourists and improve the turnover achieved with the nationals.

At the quantitative level, Vision 2015 aims to:

- Create 117 500 new jobs;
- Double the turnover of crafts with cultural content;
- Multiply formal exports by 10;
- Generate 4 billion MAD of additional GDP.

The implementation of this vision is based on the following policies:

- The creation of a network of dynamic companies, real craft manufactures, via the emergence of key players;
- The increase of turnover and the improvement of living conditions and mono-craftsmen work.

NATIONAL STRATEGY FOR THE DEVELOPMENT OF LOGISTICS COMPETITIVENESS

Launched in 2010, the national strategy for the development of logistics competitiveness aims to optimize the flow of goods, develop the capacity of this sector and to support its growth. The main planned actions are the reduction of costs incurred and, consequently, the increase of the associated added value as well as the contribution to sustainable development. To achieve these goals, the deployment of the strategy is based on five key areas:

- Optimization of various flows of goods and making them available to the mass market;
- The implementation of an integrated national network of multi-stream logistics zones;

- The emergence of integrated and efficient logistics operators;
- Skills building through a national training plan in the fields of logistics;
- The establishment of a framework for sector governance and appropriate regulatory measures.

DIGITAL MOROCCO STRATEGY 2020

Digital Morocco Strategy aims at the development of the digital economy, positioning Morocco as a regional technology hub and making information technology a vector of human development, a pillar of the economy and a source of added value for other economic sectors and public administration. This strategy falls within the continuing of progress achieved for years in the field of information technology, by continuing to position Morocco as a regional hub, and it would also provide services for citizens as well as companies, especially Small and Medium enterprises.

Assessment reports were carried out to study the various new innovations in the technological sphere, in order to put the new digital strategy in tune with technological developments, through the integration of innovative concepts, including Cloud Computing, Smart Cities, the E-commerce or the development of adequate infrastructure.

For this, the strategy focuses on the following strategic priorities:

- Raising the awareness of young Moroccans in order to promote information security culture, for the optimization of the use, by the company, of services using new information technologies;
- Social transformation, making high-speed internet accessible to citizens and promoting access to knowledge networks;

- The implementation of e-government program for transparent, efficient and oriented user quality public services;
- The incentive to computerize the SMEs so as to increase their productivity;
- The development of local information technology industry by supporting local actors and fostering the emergence of export-oriented clusters.

VISION 2020 OF THE TOURISM SECTOR

Vision 2020 of the tourism sector sets ambitious goals:

- Raising the rank of Morocco to the 20th of the world tourism destinations;
- Double the size of the sector in Morocco;
- Implementing the national and regional ambitions in this field;
- Strengthening the quality and competitiveness through, among others, highly qualified Human Resources (HR);
- Establishing a national program for innovation and tourism competitiveness;
- Supporting the emergence of integrated travel distribution players;
- Implementing the Moroccan Fund for Tourism Development (FMDT) to mobilize investment.

Thus, the strategy is expected to:

- Create 470 000 new direct jobs in the country;
- Increase tourism revenues in order to reach 140 billion MAD in 2020;
- Increase 2% contribution of the tourism Gross Domestic Product in the national GDP so as to reach 10 billion MAD in 2020 against 60 billion MAD in 2010.

GREEN MOROCCO PLAN : Orientations, Strategies and associated program

Adoption of Green Morocco Plan (PMV) :

In April 2008, the Moroccan government has adopted the global strategy of the agricultural sector, entitled PMV. It aims to fully exploit the agricultural potential of the country and aspires for the next 10 to 15 years, to double the Agriculture GDP, and create 15 million additional jobs, fight against poverty and improve the agricultural income from 2 to 3 times in favour of 3 million rural population as well as to increase the value of exports from 8 to 44 billion MAD for the sectors where Morocco is competitive. This is to result particularly in:

- A more sustained economic growth of the country;
- A notable improvement in exports and investment, particularly the private ones;
- A fight against poverty more effectively and on a larger scale, both in the countryside and in the poor suburban;
- A clear improvement in purchasing power and the quality / price for Moroccan consumers;
- The implementation of important financial, institutional and managerial means, in line with the scale and scope of challenges beyond the existing sectoral programs and this is to make agriculture a key area of growth of Moroccan economy;
- The challenges of sustainable development and evolution of territories, better reasoned about 1520 years, to rebalance the long-term food deficit, secure trade and face the challenges of water;
- The modernization and better organization of the sector stakeholders to increase their capacity to cope with hazards, including natural and market hazards, and deploy the changes required.

In developing the PMV seven main foundations were retained.

The first foundation is to consider agriculture as Morocco's main growth driver for the next 10 to 15 years, through the strengthening of its contribution to national GDP, creation of employment, exports and the fight against poverty.

The second foundation is inherent in the choice of aggregation as an innovative tool of organization intended, among other things, for a better sharing of profits in the agricultural value chain, promoting the quality of agricultural inputs, skills and technologies transfer, the creation of balanced relations between small farmers and capital markets and price stability.

The third foundation is related to the adoption of agriculture for all without exclusion, through the implementation of two pillars: Pillar I focuses on modern agriculture with high added value and high productivity while Pillar II concerns solidary agriculture, located in rather unfavourable areas.

The fourth foundation promotes the attraction of private investment of around 10 billion MAD / year via Morocco offers targeted and accompanied by public assistance.

The fifth foundation is the adoption of a participatory and contractual approach as a pragmatic transactional basis for achieving the identified projects. This is then placed in the context of mobilizing all relevant stakeholders, including the administration and the organizations under the supervision of Ministry of Agriculture and Marine Fisheries (MAPM), local and regional authorities, economic operators and their professional organizations.

Partnerships take then different forms:

1. The Regional Agricultural Plans (RAP) established between Regions, Chambers of Agriculture and MAPM;
2. The performance contracts (PC) of the agricultural sectors signed between the inter-professions and the representative professional organizations and MAPM;
3. The aggregation agreements signed between the State, represented by the ADA (Agency for the agricultural development) and the DRA (Regional directorate of agriculture) on one side, and on the other hand aggregator. And the aggregation contracts between aggregators and aggregated.

The sixth foundation relates to the redesign of the sectoral framework touching on many levels: real estate, the water policy, taxation and national circuit of marketing, support, monitoring and evaluation.

The real estate covers the private management of public and collective land, deployment of framework conditions fostering the aggregation and public-private partnership, continuation of structural reform efforts related to the registration and the recording as well as the massive acceleration of the establishment of the titles.

Regarding water policy, it is to introduce an incentive pricing in the private perimeters, to promote investment for better use of existing perimeters, develop delegated management of irrigation water and generalize modern irrigation techniques.

On the fiscal side, the establishment of an appropriate approach is targeted taking into account regional and

economic characteristics of the agricultural sector by 2013.

At the national market, the modernization of distribution channels is targeted through the use of large distribution and intermediary marketing formulas and through improving access to wholesale markets and slaughterhouses.

Finally, in terms of support, monitoring and evaluation, restructuring MAPM was made and was accompanied by the creation of new specialized structures.

The seventh and final foundation is related to the preservation of natural resources for sustainable agriculture, through:

- The implementation of projects falling within the framework of improving the resilience of agriculture to future climate change and the preservation of land and biodiversity;
- Integration of adaptation to climate change technologies in the Green Morocco Plan(PMV) projects through the dissemination of selected and certified seeds, the use of water and soil conservation techniques and fertilization of farmlands and best agricultural practices;
- Support for the development of renewable energy use in agriculture, particularly the solar, wind and biogas energies;
- The establishment of the National Irrigation Water saving program;
- Drawing up a Cultivated Soil Fertility Map for a better crop productivity at the national level;
- The National Program for the Land capability for Agricultural crops Map for efficient use of agricultural land potential.



For the implementation of the Green Morocco Plan (PMV) and in relation to the above two pillars, Pillar I is perfectly consistent with the rules of the market and should result in the implementation of 91 projects, both in production and in the food industry, benefiting 562000 farmers and this for an overall investment of 75 billion MAD.

Pillar II is related to the solidarity support of smallholder agriculture to improve the incomes of the most vulnerable farmers. In this context, it is planned to launch 55 projects known as 'social projects', for the benefit of 855000 beneficiaries and total investment of 20 billion MAD, in order to increase the production of the plant and animal sectors of the disadvantaged areas and improve the agricultural income of the farmers concerned. Such projects are economically viable and are essentially based on state intervention in disadvantaged areas, while integrating the conservation of natural resources and working on the execution of three categories of projects:

- Reconversion projects: Substitution of cereal cultivated areas in sensitive areas by crops with higher added value;
- Intensification projects: productivity improvement and enhancement of existing productions;
- Diversification Projects / Niche: creation of complementary farm income through additional productions (saffron, honey, medicinal plants ...).

Aggregation development

Aggregation, one of the foundations of the PMV is an innovative model of farmers organization around private actors or professional organizations and particularly allows to overcome the constraints related to the fragmentation of land structures while ensuring to the aggregated farms the opportunity to benefit from modern techniques of production and financing and

access to domestic and foreign markets.

This form of organization is based on a win-win partnership between aggregators, natural and legal persons and all other professional organizations (Economic Interest Groupings, cooperatives, associations ...), and the aggregated (small and medium farmers).

The choice of such a privileged mode of organization in the agricultural sector is dictated by the following main reasons:

1. It is an attractive and competitive solution for extending the scope of the upstream production in the face of a limited offer of rural land.
2. It allows to optimize the link between the market, productive upstream and all of the sector's value chain via the Following elements:
 - The competences of aggregation, in particular, in terms of the knowledge of commercialization market and the capacity of adaptation and orientation of the production offer;
 - Establishment of a direct link between production and the market (s) of destination, thus avoiding the use of a multitude of intermediaries and excessive erosion of margins.
3. It helps to generalize the best techniques thanks to the coaching teams mobilized by the aggregator and, if necessary, the production units (nucleus farm) managed by the aggregator.
4. It works on relatively facilitating access to finance for the aggregated and to improve the conditions applied to them.
5. It allows a fair risk sharing between the aggregators and the aggregated due, among others, to the fact that the risk of production is mainly borne by the aggregated, while the risk of marketing is mainly taken by the aggregators. In addition, the use of appropriate

insurances helps control these risks for both parties. The system thus defined carries several advantages for both the aggregators and the aggregated.

For the aggregators:

- Extension of the scope of activity by minimizing costs and risks;
- Securing a broader, more regular and high quality supply base in order to make significant industrial investments;
- Developing the ability to conquer new markets.

For the aggregated:

- Acquisition of new skills and technologies;
- Possibility of reconversion in sectors with high added value;

- Risk sharing with aggregators;
- Guaranteed Marketing of production..

For the consumers:

- Price stability;
- Significant improvement of the quality.

The setting up of an aggregation project can be designed according to several models adapted to each sector and each region. It is based primarily on principles to optimize all or part of the value chain of a given sector and thus allow the grouping of the aggregated around aggregators with managerial and technical capabilities able to achieve the above objective.

Taking into account the aforementioned parameters, the table below summarizes the various possible aggregation models:

Level of intervention	Level of the aggregator's intervention		
	Weak	Average	High
Upstream			
Operational role of the aggregator	Supervision and pooled means.	Services	Total involvement in the production.
Role in financing	Facilitator/Distributor.	Triangulation system.	Direct financing.
Downstream			
Level of industrial integration	Simple packaging	1st Processing.	2nd Processing.
Role in marketing	Bundling / Commercial Agreement.	Marketing and export platform.	Logistics operator, and development of a brand



Thus, the various aggregation models that can be adopted are differentiated by the missions and roles of the aggregators: at the upstream level, namely, the operation section (level of intervention in coaching and pooling of production means), the funding of the aggregated (ranging from a simple facilitation or distribution of loans granted to the aggregated to a more advanced financing system, by triangulation with banks or direct financing of the aggregated) and the possible integration of nucleus farm and at the downstream level depending on the degree of industrial integration and marketing.

As an illustration, some examples of the projects of the aggregation of agricultural sectors are given as follows:

- Cereals: Grain storage unit and / or processing;
- Legumes: storage unit and / or packaging;
- oilseed crops and organic olive : crushing unit;
- Sugar crops: processing unit;
- table wine, cereal seed, organic citrus and organic vegetables: packaging unit;
- Citrus: packaging unit and / or processing;
- Arboriculture and date palm: cold storage unit and / or packaging and / or processing;
- Olive crushing unit or canned olives;
- Vegetable crops: Packaging unit and / or processing unit or cold storage unit or complex including a packaging unit and a freezing unit;
- Red meat: fattening centre and / or a slaughterhouse;
- White meat: poultry slaughterhouse;
- Eggs: packaging unit;

- Milk: milk processing unit;
- Beekeeping: extraction unit and packaging of honey;
- Argan: extraction unit and / or processing;
- Saffron and perfume rose: packaging unit and / or cooling and / or processing.

For the operational implementation of the aggregation projects, close support is provided by ADA (the Agency for agricultural development) and DRA (Regional directorate for agriculture) concerned.

An aggregation project goes through the following key phases:

1. Prospecting Phase: Identification of an aggregation project can be carried out either in the context of the preparation of a range of projects for submission to potential aggregators or in support of a potential aggregator wishing to undertake an aggregation project for a given sector in a given region and the preliminary identification of the interested aggregated.

2. Conception Phase: It involves the preparation of the aggregation project between the DRA, the aggregator and the ADA(the Agency for Agricultural Development). It allows characterizing the qualifications of the aggregator, the projected business plan, the planned investment program, the proposed interventions of the aggregator to the aggregated. Thereafter, the project is submitted to the Technical Committee Local 1 composed of representatives of Central Directorates of MAPM (DIAEA, RFLD and DDFP), INRA, DRA and ADA for review.

3. Phase of contracting: It is intended to clarify the obligations of the aggregator, with regard to the above questions. On this basis, an aggregation agreement is prepared between the aggregator, on the one hand and the ADA and the DRA concerned, on the other hand. It consists of direct negotiations between the aggregator and the aggregated, with the mediation of the DRA and the support of the ADA, and focuses on the terms of the aggregation contract. On this basis, these terms are signed between the aggregator and the aggregated. The draft contracts and agreements are submitted to the Local Technical Committee 2 for validation and approval.

After this phase, the project is submitted for validation to the Investment Committee chaired by the Minister of Agriculture and Maritime Fisheries. The decision of the Investment Committee is subsequently notified to the aggregator.

4. Phase of implementation: It consists of the implementation of the aggregation project under the terms of the said agreement and aggregation contracts signed with the aggregated, particularly through the completion of the planned investment program and the implementation of operations and interventions proposed by the aggregator to the aggregated.

Once the aggregation agreements and aggregation contracts are established, the validated projects are listed in a register kept by the ADA which delivers the aggregator an aggregation certificate allowing them to benefit from the specific state aid to the aggregation.

Establishment of interprofessions

Interprofessions are bodies constituted by the professional organizations representing the sector of production, valorisation and / or marketing of agricultural products and which have as the main missions to ensure the following:

- The marketing of the sector's products in the domestic market and abroad;
- Development of new markets and support professionals in order to market their products;
- The dissemination of information on products and markets;
- The focus on the matching of production and logistics with the demand, according to the legal framework and the rules of the market;
- The proposition and the continuation of applied research and product development programs;
- The description of the rules and specifications for quality products;
- The promotion and development of geographical and product quality indications;
- The support of professionals in the application of sanitary and phytosanitary rules related to products;
- The contribution to technical training and professionals coaching;
- Encouraging professionals to adopt rules and good practices in the protection and preservation of the environment;
- The resolution of conflicts and the establishment of agreements between professionals;



- The signing of agreements and conventions, validated by the professional organizations, which provide for activities related to their areas and target an added value in line with the common interest and in accordance with the legislation in force.

Development of local products

PMV (Green Morocco Plan) adopted among its priorities the development of local products, given the real potentialities of Morocco in terms of favourable ecosystems, varied biodiversity and expertise in this area, and the cultural dimension of these products which is a part of the Moroccan heritage, and the strong social dimension of their production, often carried out in remote and disadvantaged areas.

Two major approaches were used in the marketing strategy of terroir products:

- Revisiting the mix marketing, by making improvements to products, to packaging, pricing, promotion and development of labelling;
- Finding the market access routes by strengthening relations between producers and distributors. The targeted markets are the domestic and foreign ones, including the Western Europe and the USA.

Local products should thus allow a viable and durable development of the remote or difficult to access areas. To do this, the priority levers for action identified are in different levels of the value chain and are translated into as follows:

- Development of the upstream and aggregation of producers;
- Establishment of regional platforms of logistics and distribution;
- Promotion of labels;
- Establishing agreements with supermarkets and hypermarkets in Morocco;

- Conducting a wide communication campaign at the national and international levels.

Labelling, governed by Law No. 2506 on Distinctive Signs of Origin and Quality (SDOQ) of food and agricultural and fishery products and its implementing regulations, is one of the variations of the aforementioned levers. It introduces three SDOQ: Protected Geographical Indication (PGI), the Protected Designation of Origin (PDO) and Agricultural Label (AL).

Implementation of National Program for Irrigation Water Saving (PNEEI) (NPEWI):

To cope with the requirements of development of a more productive, more competitive and sustainable agriculture advocated by the PMV (Green Morocco Plan), the PNEEI (National Program for Irrigation Water saving) falls within the transversal measures designed to mitigate the effects of water resource scarcity and improve the use efficiency of irrigation water.

The program, whose implementation is planned over the period 2008-2020 and the total cost would be about 37 billion MAD, concerns the reconversion of the existing irrigation techniques, with low efficiency, in drip irrigation, over a total area of about 550 000 ha. This area is as follows:

- Perimeters of Large hydraulics :395 000 ha, including:
 - 220 000 ha in collective reconversion, related to the modernization of collective irrigation networks to facilitate the reconversion to efficient economical irrigation techniques for water at farm level;
 - 175 000 ha in individual reconversion to farm level on the initiative of farmers..
- Perimeters of Small and Medium Hydraulics and private irrigation: 160 000 ha in individual reconversion.

The PNEEI is designed around the following components:

- The modernization of collective irrigation networks

(Large Hydraulics);

- Equipping the farms with drip irrigation through the grant of financial assistance from the State by the FDA (Agricultural Development Fund);
- Support and guidance for farmers in order to value water, through the introduction of high value crops, aggregation, agricultural consulting, research / development...

The main expected benefits of PNEEI are as follows:

- The saving of a water volume of around 14 billion m³;
- The increase in the added value per m³ on average from 26 MAD/m³ to 56 MAD/m³ and the increase in domestic production and agricultural exports;
- The sustainable management of groundwater through the control of the supply of water to crops;
- Adaptation to climate change through the mitigation of water shortages;
- Reducing water pollution through the mitigation leaching of fertilizer and better control of water supplies and fertilizers;
- Mitigation of the risk of intrusion of seawater into coastal aquifers due to the overexploitation of aquifers.

New Strategic Vision of the Agricultural Council

Developed in 200 to accompany the implementation of the Green Morocco Plan, the national strategy of the Agricultural Consulting (SNCA) is based on a new approach of consulting and coaching of actors, which is more participatory, innovative, efficient and focused around the real needs of stakeholders in the priority sectors. It targets in particular the farmers of the Pillar II of the PMV (small and medium farmers and ranchers, located primarily in disadvantaged regions of Morocco).

This strategy aims thus to establish a system of consulting by the year 200 that is based on the progressive empowerment and accountability of actors. The state regulates and stimulates the development of the private agricultural consulting while guaranteeing a close public service to farmers. Private actors are empowered to take over the action from the State. The revision and redesign of the national system is made so that:

1-Going beyond the logic of the classical popularization, by providing the producers with the capacities to determine their needs, pinpoint their objectives, control their actions and, more broadly their management process of production units;

2-Accompanies the sector as a whole, the upstream and downstream of the production process by facilitating access to knowledge, with (i) upstream, access to information on inputs, financial services, knowledge and to knowledge related to technical, financial, organizational, and institutional innovation, and best practices and innovations from professionals themselves and (ii) downstream; access to information on the development and commercialization of products, certification, and markets,....

Three directing Principles guide the strategy:

- The plurality: through the involvement of actors with clear and complementary missions to ensure the coordinated implementation of structured and effective action on the one hand and the multiplicity of tools, canals and actions on the other hand;
- The adoption of a «bottom-up» approach to ensure customized proximity service;
- Integration of innovative tools (virtual networks, specialized websites, radio, television, SMS, call centre, interactive kiosks) into the national coaching and consulting system.

It revolves around three strategic axes:

- The revitalization of the role of the state;
 - Making available to actors a network of entities of close and efficient agricultural consulting and the development of a comprehensive system of knowledge management.
 - Development of the private agricultural consulting:
- The overall system of agricultural consulting will be strengthened by a new profession of private agricultural consultants able to complete the offer for farmers and professional organizations.
- The empowerment of farmers, chambers of agriculture and other trade organizations:

Professional organizations, chambers of agriculture are at the heart of the system and create the necessary bridges for a useful and usable agricultural consulting.

Organizational system:

Created under the 58 12 law enacted by Dahir No. 1 12.674 Rabii I 144 (16 January 203).

It is responsible for leading, coordinating and monitoring the implementation of the strategy of agricultural consulting at the national level. Public institution with

legal personality and financial autonomy, the ONCA (National Office of the Agricultural Consulting) is administered by a board of directors and managed by a Director General.

It is responsible for implementing the government's policy on agricultural consulting, particularly through:

1- MISSIONS

The National Office of the Agricultural Consulting is responsible for implementing government policy on agricultural consulting, particularly through:

The agricultural consulting

- Coaching the farmers in terms of consulting concerning the fight against diseases affecting plants and animals;
- Assisting and supporting farmers in their efforts to allow them to get access to the financial encouragement and assistance provided for by the legislation and regulation in force;
- developing and applying innovative methods in agricultural consulting, including through new technologies of information and communication and audiovisual media;
- Providing agricultural consulting revolved around the gender perspective for better promotion of rural women.

The support and guidance of professional organizations

- Providing support, coaching and giving advice to professionals in agricultural production sectors concerning the techniques of production, valorisation, marketing and operations management;
- Supporting professionals in the conception and implementation of innovative agricultural projects and aggregation projects.

Supporting the actions taken by other agricultural development actors

- Undertaking actions regarding marketing of agricultural inputs;
- Contributing with the departments of the Ministry of Agriculture to collect data related to the agricultural sector;
- Contributing to the monitoring of solidary agriculture projects in the field.

The interface with the Training and Research

- Providing continuing training actions regarding agricultural consulting and implementing professional development programs, including agreements with professional organizations, chambers of agriculture and national institutions for education and research;
- Disseminating the results of applied research and modern methods of production and valorisation and marketing of agricultural products.

2- AREAS OF INTERVENTION

To facilitate access to information and knowledge, agricultural consulting services will resort to different channels and innovative materials in order to diversify the means of communication and consulting and reach the largest number of farmers through:

The establishment of new channels of agricultural consulting

- The establishment of farmer field schools (FFS);
- The organization of agricultural events and activities;
- The organization of agricultural programs with our different partners;
- The production of educational films of agricultural consulting;
- The production and distribution of agricultural consulting spots
- The production and broadcasting of programs and television and radio programs of agricultural consulting;

- The establishment of the institutional site of the ONCA (national office of agricultural consulting) www.onca.gov.ma;
- Establishment of interactive kiosks;
- The making available agricultural advisers soil testing equipment, water and oil, disease prevention tools and diagnostics;
- Making available to agricultural consultant the media (tablets, GPS) to facilitate their access to agricultural information management database.
- Continuing training of agricultural consultant
- The development of agricultural consultant skills, major axis of the intervention of the ONCA, for the execution of a multi-year training plan that meets the real needs of beneficiaries;
- Strengthening and constant monitoring of skills of public agricultural consultants.

The National Office of the Agricultural Consultant operates in a supportive environment with opportunities for partnerships and cooperation.

In line with its prerogatives, particularly regarding the support and guidance of professionals, the ONCA established partnership agreements with key stakeholders in the agricultural consulting system to ensure complementarity and pooling of resources mobilized and / or mobilized by these actors.

The ONCA also strengthens its activities by establishing a number of cooperation agreements with international organizations and bodies concerning technical cooperation projects, mainly to develop the capacity and skills of human resources and promote the use of new channels of information.

3- ORGANISATION

An organization dedicated to farmers

The National Office of the Agricultural Consulting is designed to meet the agricultural consulting missions, through a regional, provincial and local organization:

- 16 Regional Directorates;
- 50 provincial services;
- 30 local Agricultural Consulting Centres

System of Knowledge Management:

It is based on a full contribution of multiple public and private actors at various levels, including:

- The centre of Pillar II resources of PMV (CRP2)
- The regional chambers of agriculture (16) ;
- Institutes of research and training, namely the National Institute for Agricultural Research (INRA), the Institute of Agronomy and Veterinary Hassan II (IAV) , the National School of Agriculture of Meknes (ENAM) and ' National School of Forestry Engineers (ENFI) which are made in a consortium to unite the efforts of researchers at national level.
- Professional Organisations (POs) and Interprofessions (IP).
- Input suppliers;
- Public and private firms;
- Other stakeholders such as the partners of MAPM (Central Directorates of Departments concerned, ADA ...), farmers and international organizations.
- The overall operation results from the distribution of the following tasks:
- The state plays a central role in defining the strategic orientations and in the planning and execution of part of the agricultural consulting. It regulates and stimulates the development of Private Agricultural Consulting while remaining guarantor of a proximity public service to farmers.

- The other public and private stakeholders ensure the exchange of information and experiences and the execution of agricultural consulting actions and accompanying farmers in their projects.

Supporting Higher Agricultural Education:

Public Agricultural Higher Education is currently provided by three institutions operating under the Ministry of Agriculture and Maritime Fisheries.

These institutions are the Institute of Agronomy and Veterinary Hassan II in Rabat (IAV Hassan II) and Horticultural Complex (CHA) in Agadir, the National School of Agriculture of Meknes (NAS) and the National School of Forestry engineers in Salé (ENFI).

By Decree No. 203.21 of 22 Rabia 1st 147 (21 April 206), these establishments are selected from those not covered by the University. They are, to date, subject to their specific legislation and the provisions of Law No. 01 00 regarding the organization of Higher Education.

In accordance with Article 37 of the Act and as part of the implementation of agricultural training and research strategy launched in 2013 by the Ministry of Agriculture and Maritime Fisheries, a bill is being developed for the grouping of these establishments in a polytechnic pole of higher agricultural education.

The strategic objectives of polytechnic pole are:

- Taking advantage of the benefits granted to the university, including large missions, modalities of creation and operation similar to those of universities;
- Providing a higher level of representation at the level of orientation and coordination bodies of higher education;
- Providing a better transparency at national, regional and international levels, of greater action capacities and a better rationality in the use of resources.



Strengthening technical education and vocational training in agriculture:

The system of technical education and vocational training in agriculture, whose purpose is the support of the deployment of PMV consists of:

- The agricultural vocational training which aims to improve the technical and competitive aspects of businesses and farms by meeting their skilled human resource needs, and qualified technician, worker and specialized technicians levels. It relies on a network of 52 institutions spread across all regions of the country and which have 24 training specialties corresponding to the priority choices of PMV.
- Technical agricultural education that aims to enable young students to open onto the agricultural environment and assimilate its social, cultural and economic particularities and to help them acquire the technical knowledge to pursue studies in agriculture. It is provided by 08 secondary schools preparing the Baccalaureate degree in Agricultural Sciences and 30 rural middle schools to ensure the education of Agricultural Technology.
- Apprenticeship training for the social and professional integration of the rural youth who are out of school or have completed the functional literacy. It is provided by all agricultural vocational training institutions that provide annually certification of 10000 young people in 20 professions.

Support of research and agricultural development:

Research and development programs (R&D) are conducted, particularly by INRA (the National Institute for Agricultural Research) which is the national institution whose mission is to undertake research and R & D for agricultural development. It is a decentralized institution represented at a regional level by 10 Regional Centers for Agricultural Research (CRR) covering different agro-ecosystems and having 23 experimental fields. INRA accompanies PMV at the research and development level while IAV Hassan II, ENA and ENFI

support it through basic training and training-research. The areas of R & D activities include the transverse fields and production sectors, mainly:

- The preservation of natural resources, water, soil, and plant and animal biodiversity particularly through biotechnology;
- Analysis of the integration of climate change and risk management in productivity forecasting and adaptation and resilience of production chains and livestock and rangeland systems;
- The agro-ecological characterization of the natural environment;
- The creation of varieties with high production potential and which requires less water and resistant or tolerant to diseases;
- Improving the productivity and diversification of agricultural production in the following areas:
 - Plant production: it relates to cereals sectors, food legumes, annual oilseeds, fodder crops, citrus, olive, date palm, fruit trees, vegetables and red berries, sugar beet, argan, medicinal and aromatic plants, wines, and other Terroir products (cactus, saffron, rose, carob ...) and organic farming.
 - Livestock production: it specifically targets the bovine, sheep, goat, camel, poultry and bees sectors and is made, if necessary, by integrating sustainable management of natural resources in the rangelands.
- The improvement of the performance of the sectors regarding the genetic enhancement and production techniques and integrated and sustainable protection techniques. This includes the management of soil fertility, rainwater and irrigation water and the fight against biotic and abiotic plagues.
- Improving the quality of agricultural products and development of low commercial value products and local products;

- Studies of the typicality of local products and strengthening production and valorisation procedures;
- Basic economic and social studies for the analysis of efficiencies of production systems, agricultural policies, sectors and the impact assessment for the development of agriculture and livestock;
- The promotion and dissemination of research results with the participation of various partners, and research customers and users.

Private Agricultural Consulting

The Ministry of Agriculture and Maritime Fisheries conducted several reform projects including that of regulating the profession of the agricultural consultant. Thus, the law 62 12 on the organization of the agricultural consultant profession was developed by the Department of Agriculture and published in the official journal No. 625926 of 26 rajab 145 (May 26 2014). This law provides the legal framework for the practice of rational and operational consulting and vector of innovation and positive change.

The law 62 12 has set as goals to:

- professionalize the supervision activity and prepare the emergence of a body of agricultural consultants and operational and effective consulting;
- encourage the organization of producers and production chains and foster the support of agricultural development by the stakeholders;
- expand job opportunities for graduates of higher education and vocational training institutions of agriculture;
- Putting the mediation of the state in a contractual framework for the supervision of producers and agricultural organizations.

Enforcement decree No. 214.57 falls within the framework of the implementation of the provisions of this law, it is published in the official journal No. 634 of February 12,

2015, this decree determines and refers to the orders issued by MAPM which concern:

- The list of institutions for obtaining the certificate authorizing to practice the profession of agricultural consultant;
- The CV model;
- The model of an affidavit;
- The model of the authorization;
- The model of the register and the conditions of its content,
- The appointment of three (03) professionals representing three agricultural production sectors for a period of three years.
- The model of the statutes of the association and the professional federation of agricultural consultants.

The authorizations are issued to agricultural consultants (legal person or natural person)) by the Ministry of Agriculture and Maritime Fisheries.

The application for authorization is sent to Mr. Minister of Agriculture and Maritime Fisheries and must be lodged with the entire file to the Directorate of Education, Training and Research or be sent by registered letter with acknowledgment of receipt.

The component documents of the authorization application and the models to be followed are specified in the implementing decree cited above and corresponding orders.

UPGRADING THE LEGAL FRAMEWORK OF AGRICULTURE

The deployment of PMV and associated structuring programs are accompanied with an upgrading of the legal framework of the agricultural sector. This is done through the revision of existing texts, when this proves necessary, and the adoption of new legislation, such as the texts relating to grants and state aid, the Public-Private Partnerships, the applied controls, authorizations and approvals required by SDOQ (Distinctive

Signs of Origin and Quality) as well as the aggregation and interprofession.

Therefore, by way of illustration, the law 04 12 related to the aggregation include:

- A legal definition of the basic principles of aggregation;
- Laying the foundations for securing the relationship between aggregators and aggregated;
- Setting out the mandatory clauses of the aggregation contracts;
- The definition of the mechanisms and dispute settlement bodies;
- The definition of the regulatory framework incumbent on the State.

Application texts of the said Act are likely to cope with the difficulties mentioned above and, in particular through the following:

- The simplification of procedures for approving the aggregation projects and awarding certificates of aggregation;
- The generalization of support for the aggregation to all sectors signatories of performance contracts;
- The simplification of eligibility standards
- The observation of production collected at the upgrading unit with estimation of yields to a representative sample of the aggregated (in consultation with the aggregator)
- The determination of aggregated area on the basis of the administrative document issued by the departments concerned notifying the relation with the farm (accompanying the aggregation contract);
- The adaptation, in consultation with the interprofession, of the aggregation models to each sector and the revision of aggregation standards of the sectors (minimum number of aggregated farmers, minimum aggregated area and minimal

production to achieve in the aggregation project);

- The tolerance of a rate of withdrawal of the aggregated from the initial list adopted in the project as long as the minimum eligibility standards are met;
- The granting of preferential grant in two instalments (Universal + bonus) on the basis of a single file submitted by the aggregated.

In terms of the law relating to the interprofession, it works on the organization of the operators of all the components in the same sector (production, promotion and marketing) around a unified and coordinated vision. It also aims to combine the efforts of stakeholders in key areas such as coaching, research, technology and transfer, dissemination of information and promotion of products.

The main provisions from the legal framework are developed in the rest of the document, including, at the level of Chapter 4.



Strengths and Potentials of Investment in the Agricultural Sector

Strengths and advantages of the Moroccan agricultural sector

The Moroccan agriculture has always played a leading social and economic role. PMV (Green Morocco Plan), having chosen to reinforce its strengths and overcome its main endogenous disabilities, has been active in strengthening and multiplication of the assets of this sector by incorporating, among others, those following:

- Comparative advantages in several production sectors;
- The existence of agricultural and agro-industrial structures can serve as successful models such as COPAG, COSUMAR, ANOC ...
- Achieving important development for irrigation related to large dams and large Hydraulics, in general;
- A diversification of plant speculation resulting from the introduction of new highly profitable crops, such as fruit plantations, forage and vegetable crops, and by improving production techniques and factors;
- The domestication of new medicinal and aromatic local and exotic species;
- The competitiveness of production costs of agro-food activities directly related to that of inputs, workforce and various other factors of production;
- The tax and customs benefits granted by the State;
- The upward trend experienced by agricultural commodity prices on international markets;
- The potential of the domestic market, particularly associated with population growth, improved living standards and consumption patterns;
- A growing international demand on certain Moroccan basic or processed agricultural products which allows enhancing the export market.

Investment Potential in the Agricultural Sector:

The Moroccan agricultural sector, particularly through the PMV (Green Morocco Plan), provides economic operators (individual or grouped farmers, among others, in aggregation projects, specialized companies, national and international groups ...) significant investment opportunities at all levels of the agricultural value chain:

- In the upstream, at the level of production and, where appropriate, through Public Private Partnership projects;
- In the downstream, in terms of upgrading and promotion of production and / or marketing;
- Through support activities such as agricultural supplies, research and development and agricultural consulting.

The PMV forecasts in fact a total investment of 17 billion MAD, over 10 years, around a Morocco Agricultural Offer.

The offer in question, which shall be well targeted, is associated with incentives, like those developed in the third part of the guide.

The main investment projects are listed in the 16 Regional Agricultural Plans established as regional version of the PMV. Such projects are included in a comprehensive perspective to increase the production levels of the identified sectors, improve the quality and conditions of production marketing, increase the level of better management of irrigation water with quantified positive impacts on the creation of added value and jobs.

The following table shows, per region, the number of projects planned at the level of Pillar I and Pillar II of the PMV and specifies the investments required for their implementation and for achieving the projected transversal actions

Region	Number of projects			Investment (MAD billion)			
	PI	PII	Total	PI	PII	Transversal Actions	Total
Grand Casablanca	20	15	35	1,8	0,2	0,1	2,1
Chaouia-Ouadigha	230	65	295	4,5	1,9	2,4	8,8
Oued Eddahab-Lagouira	19	3	22	1,6	0,1	--	1,7
Doukkala-Abda	83	13	96	4,4	0,4	5,7	10,5
Fès-Boulemane	85	23	108	7,1	2,2	1,3	10,6
Gharb Cherarda- Beni Hssen	91	22	113	17,3	0,8	19,6	37,8
Guelmim-Essmara	6	9	15	0,7	2,1	0,1	2,8
Laâyoune-Boujdour-Sakia El Hamra	4	10	14	0,2	0,7	--	0,9
Marrakech - Tensift - Al Haouz	82	59	141	6,2	2,2	2,0	10,4
Meknès - Tafilalet	103	67	170	8,6	2,6	--	11,2
Oriental	41	19	60	5,1	1,0	3,0	9,1
Rabat - Salé Zemmour-Zaër	58	39	97	2,9	0,9	1,5	5,3
Souss - Massa - Draa	24	56	80	4,9	1,5	4,1	10,5
Tadla - Azilal	38	32	70	5,0	0,6	6,3	11,9
Tanger- Tétouan	43	72	115	2,4	1,3	4,5	8,2
Taza-Taounate-Al Hoceïma	34	41	75	2,1	1,9	1,2	5,2
National total	961	545	1 506	75	20	52	147

Moreover, for greater integration of the agro industry and in order to work to strengthen the competitiveness of its businesses and increase their added value and to have privileged sites to host investment for the processing and development of agricultural products, six agropoles are planned in the major agricultural regions of the country.

Furthermore, the investment in the marketing of agricultural inputs and products is also promising, as it is shown in the fifth part of the guide. As an illustration, the potential of development of agricultural supplies is important in view of the anticipated developments, as shown in the following tables:

For production factors:

Drip Irrigation	+ 350 %	From 154 000 to 692 000 ha
Fertilizer use	+ 78 %	From 09 to 16 million t /year
Mechanization	+ 53 %	55 000 to 84 000 tractors

For plant material:

Use of seed	+ 144 %	De 07 à 18 million quintals /year
Use of seedlings	+ 40 %	+ 18 million trees

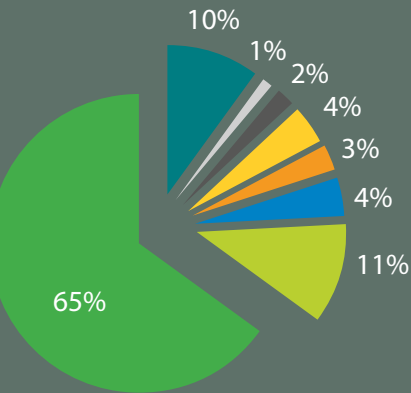
Characteristics of the Agricultural Sector



USABLE AGRICULTURAL AREA (UAA)

With an area of almost 87 million hectares, the UAA is highly benefitting from a wealth of agro-climatic systems that allow it to produce a wide range of agricultural products.

The importance of the area occupied by cereal crops as well as fallow crops as illustrated in the following graph, shows tremendous opportunities for intensification and crop substitution at the national level



Use of UAA in %

- Gardening
- Oilseeds
- Industrial crops
- Fodder
- Fallow
- Leguminous
- Fruit plantations
- cereals

To change this situation, the Green Morocco Plan (PMV) predicted the increase of productivity of cereal crops and a partial reconversion of land towards more creative value added uses, particularly those of fruit arboriculture. This choice is faced by the importance of profitability differentials between sectors. In fact, while cereals occupy almost 65% of the UAA, they will participate in the agricultural GDP only up to 19%. On the other hand, vegetable cropping, with only 3% of the UAA, contributes nearly 13% of the agricultural GDP.

However, the use of the land is largely determined by the climate. In fact, nearly 80% of the country is dry or desert areas with an average annual rainfall not exceeding 20 mm and less than 10% is found in the sub-humid and humid zones, with average annual rainfall exceeding 50 mm.

CLIMATE

Morocco is characterized by a very different climate according to the areas. It is in fact temperate in the coastline while there desert climate in the south and east of the country. Thus, the climate is marked by several shades of difference: Mediterranean in the north, oceanic in the west, continental in the interior and Saharan in the south. In addition, the climate varies with the seasons.

The peculiar geographical position of Morocco also gives it a range of varied bioclimates, ranging from humid and subhumid in the saharian and desert areas , to the arid, semi-arid and the high mountain climate in the Rif, the Middle and High Atlas where altitudes are exceeding respectively 250 m, 300 m and 400 m. Therefore, rainfall decrease generally from north to south and is only more important on the mountains where they reach 200 mm in the Rif. They are less than 10 mm in the pre-Saharan and Saharan regions. the

minimum annual average temperatures range from 5 ° C to 15 ° C depending on the region with negative absolute minima particularly in mountainous regions and those nearby. Temperatures can reach 45 ° C in the centre of the country and exceed 50 ° C in the interior of the Saharan regions.

WATER RESOURCES

Morocco has natural advantages which ensure good water availability: a large Atlas water tower, perennial rivers like the Oum Erbia, the Sebou, Moulouya, the Tensift and significant groundwater. However, the hydrological situation of the country is influenced by an annual irregularity and very marked interannual rainfall variability and heterogeneity of their spatial distribution.

Furthermore, the available hydraulic potential is estimated at 22 billion m³, with 18 billion m³ from surface water and 4 billion m³ from groundwater.

For the mobilization of resources, Morocco has built 13 water transfer systems and 19 large dams, of which 17 shown in the following table, are intended solely for agricultural use, with a total storage capacity of nearly 175 billion m³.

Dams	Capacity million (m³)
Complex Sebou	4 946
Mansour Eddahbi	445
Moulay Youssef	150
Hassan Addakhil	321
Moulay Abdellah	103
Mokhtar Soussi	49
Oued El Makhazine	699
Complex sur Oued Za	841
Bin El Ouidane	1 243
El Kansera	221
M.B.A. Al Khattabi	20
Lalla Takerkoust	54
Aoulouz	108
Hassan 1st - Sidi Driss	245
Al Massira - Ahmed El Hansali	3 506
Youssef Ben Tachfine	302
Abdelmoumene	201

Although it only concerns 16% of the UAA, irrigation is the main user of water in Morocco (80% of mobilized water). The potential of irrigable land amounts to 166400 ha of which 1364 million ha of perennial irrigation and 300000 ha of seasonal and spate irrigation.

Moreover, the total area equipped for irrigation has reached 145810 hectares, of which 101670 hectares of areas developed by the State.

This is the result of significant public investments in irrigation schemes and which has thus represented between 43% and 77% of public investment allocated to agriculture during the decades of 190, 190 and 190. In this regard, it is noteworthy that in the period 195 - 207, Morocco has invested almost 33 billion MAD for achieving the water management in agriculture, more than 87% in areas of Large Hydraulics.

The main types of irrigation prevailing in Morocco are as follows:

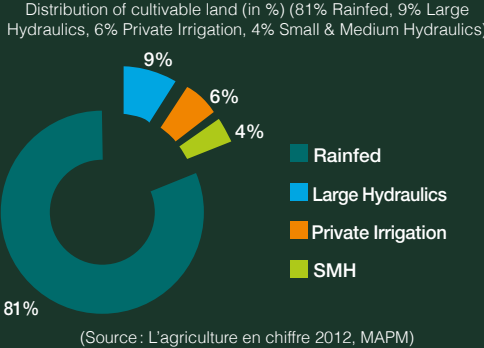
Large Hydraulics: corresponding to a perennial irrigation potential of 880000 ha, it relates to nine major areas: Moulouya Loukkos, Gharb, Doukkala, Haouz, Tadla, Souss-Massa, Tafilalet and Ouarzazate. Irrigation water comes mainly from dams. The water management in agriculture and management of irrigation infrastructure are entrusted to the Regional Office for Agricultural Development.

Small and Medium Hydraulics: it covers an irrigable potential assessed at 484000 ha of perennial irrigation and 300000 ha of seasonal irrigation and spate irrigation. It involves a significant number of areas spread over almost all the national territory and whose area can vary from tens to thousands of hectares.

The layout of the Small and Medium Hudraulics is provided by the State by involving the beneficiaries through a participatory approach.

Private irrigation: the water management in agriculture achieved by the private sector covers nearly 441430 ha.

The given graph, below, shows the distribution of cultivable land recorded in late 2011:



It is noteworthy that the sector of irrigated agriculture contributes on average to 45% of the agricultural GDP and nearly 99% for the production of sugar, 82% for vegetable crops, 10% for citrus, 75% for forage and 75% for milk. In addition, it provides nearly 10 million working days per year, or about 165 million jobs, of which 250000 permanent jobs.

Morocco's agricultural sector is characterized by the fact that some plant and animal sectors have a significant socio-economic weight.

In order to fully exploit the advantages of the Moroccan agriculture industries, governments and relevant agricultural professions agreed to undertake extensive upgrading programs. In this framework 19 performance contracts with clear, comprehensive and coherent objectives, have been signed since 208 to implement the commitment and determination of MAPM (Ministry of Agriculture and Maritime Fisheries) and professions concerned to work together for the upgrading and development of key sectors.

The data sheets, below, present particularly the baseline and the targets set, the intended axes and trends of upgrading, the investments required and the main commitments undertaken by the parties concerned.



Sectors concerned:

Citrus fruits
Baseline data
<ul style="list-style-type: none">• A covered area of 85000 ha and an average production of 13 million t per year;• 13000 farmers employees, 21 million working days per year, divided into 12 million in orchards and 9 million in the packaging industry;• Oscillating citrus exports around an average of 540000 t per year, the equivalent of 3 billion MAD currency per year.• Disparate marketing system with only the branch of exports which is relatively organized.
Goals
<ul style="list-style-type: none">• Improving the competitiveness of the citrus industry;• Achieving by the year 200 an area of 105000 hectares and a total production of around 29 million t, 13 million t for export.
Trends of upgrading
<ul style="list-style-type: none">• Development of citrus heritage: renewal and expansion of plantations, equipping with Drip irrigation system and inciting for aggregation;• Improving the production development;• Development of marketing through the development and promotion of exports and the restructuring of the internal market;• Development of framework conditions in the sector: Strengthening the professional organization, strengthening research to meet the needs of the sector and strengthening training and coaching
Investments
Total investment : 9 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Contribution to the determination of the action plans for the sector;• Support for plantation programs, setting up drip irrigation system and production development;• Revision of the incentive framework related to the market diversification and financing of export promotion campaigns.• Contribution to the development of research-development and training
The main commitments of the profession
<ul style="list-style-type: none">• Development of the national citrus cultivation heritage to 105000 ha in 200 against an area of 85000 ha in 209;• Equipping, by the year 200, 85% of the citrus area by drip irrigation systems in order to achieve an irrigation water savings of 10 million m3;• Establishment of the citrus inter profession, strengthening the coaching of producers and promoting research;• Contribution to the export diversification and promotion;• Implementation of quality standards of fruit sold on the domestic market.
Data on the signed performance contract
Period covered : 209 - 208. Signatories representing the profession : Citruss Producer In Morocco (CPM), Maroc Fruit Board (MFB) and Fresh Fruit (FF).



Olive
Baseline data
<ul style="list-style-type: none">• With around 680000 hectares, it represents over 55% of the national tree space;• Sector participating in up to 5% in the formation of the agricultural GDP and up to 15% in national food exports;• 100000 permanent jobs for around 400000 farms;• Large and medium farms representing about 6% of the total and an average productivity between 15 to 25 t / ha;• Traditional sector with nearly 16000 Maasras for a capacity of 170000 t;• Modern sector of transformation of olives with 70 crushing units, with a total capacity of about 700000 t.
Goals
<ul style="list-style-type: none">• Extending olive cultivation over an area of 122 million hectares against 680000 hectares in 2009, so as to achieve an olive production of 25 million t by 200 against 700000 t in 209;• Increasing domestic consumption of olive oils and table olives to reach respectively 4 kg / Person / Year and 5 kg / person / year;• Producing 10 million of certified seedlings between 209 and 200;• Enhancing export volumes to reach ultimately 120000 t of olive oil and 150000 t in table olives;• Creating additional 200000 permanent jobs.
Trends of upgrading
<ul style="list-style-type: none">• Development of production and quality according to an integrated model;• Ensuring a strong and sustainable Recovery;• Improving the framework conditions of the sector.
Investments
Total investment : 295 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Introduction of a legal framework for the aggregation that preserves equity between aggregators and aggregated;• Upward revision of the amount of the investment premium for drip irrigation line, irrigation line other than drip irrigation and rainfed;• Encouragement of exports of olive oil by granting aid from 200 MAD / t for a period of 10 years.
The main commitments of the profession
<ul style="list-style-type: none">• Achievement of olive productivist aggregation projects launched by the Government;• Equipment of olive orchards with irrigation systems of 136000 ha;• Rehabilitation of olive trees on a surface of 300000 ha and 20% increase in the crushing capacity to reach 22 million t / year;• Significant improvement in price / quality ratio;• Implementation of the partnerships with 'Private Label operators' at the level of traditional markets and strategic positioning to capture growth in the US
Data on the signed performance contract
Covered period : 209 - 200. Signatories representing the profession: Moroccan Inter Professional Federation of the Olive (INTERPROLIVE).



Date Palm
Baseline data
<ul style="list-style-type: none">• An activity which contributes between 20 to 60% to the formation of agricultural income for over 14 million of inhabitants;• A covered area of about 48000 ha for a total number of 48 million palm trees;• A national palm grove one of the richest in the world, with over 20 varieties;• Challenges related to the treatment of the devastating effects of cycles of drought and various diseases.
Goals
<ul style="list-style-type: none">• Creating new plantations outside palm groves for 17000 ha;• Rehabilitating and restoring 48000 ha of existing palm groves;• Producing 160000 t and 185000 t of dates in 200 and 200 against 90000 t in 200;• Strengthening national availabilities of vitro plants to increase the average production to 300000 t between 200 and 200;• Valorising a total tonnage of 110000 t in 200, nearly 70% of production expected by 200, 70000 t of packaged fresh dates, 20000 t of processed products and 20000 t of animal feed ;• Developing exports to reach 5000 t in 200 and 10000 t against negligible quantities in 200
Trends of upgrading
<ul style="list-style-type: none">• Enhancement of production capacity of strains and vitro plants of date palm;• Engagement in sustainable development paths, improving quality and upgrading of production;• Improving the framework conditions of the sector
Investments
Total investment : 77 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Establishment of productivist aggregation projects and realization of social projects of palm groves reconstruction;• Contribution to the development and structuring of production marketing;• Export promotion.
The main commitments of the profession
<ul style="list-style-type: none">• Meeting the technical and phytosanitary requirements by the adequate infrastructures and technical resources;• Raising awareness and mobilization of agricultural cooperatives and unions to the various programs;• Significant improvement of the quality/price ration and diversification of supply.
Data on the signed performance contract
Covered period : 200 - 200. Signatories representing the profession: Moroccan Inter professionnall Federation (FIMD).

Early season vegetables
Baseline data
<ul style="list-style-type: none">• An occupied average area of 260000 ha.• A production of around 7 million t in three sub sectors: vegetable crops of season (52 million t), early season (17 million t) and crops for agro-industry (140000 t);• Nearly 60 million working days (50 million at the level of production and 10 million in the packaging), the equivalent of 200000 permanent jobs.
Goals
<ul style="list-style-type: none">• Developing production around productivist projects;• Creating opportunities of the sector in the domestic and export market;• Improving the framework conditions of the sector;• Producing from 3 to 35 million tonnes of early vegetables, of which 17 million tonnes for export by 200.
Trends of upgrading
<ul style="list-style-type: none">• Development of production around high added value projects (from 70 to 10 projects, of which over 50 identified within the framework of the Regional Agricultural Plans)• Development of the sector opportunities;• Improving the sector framework conditions.
Investments
Total investment : 21 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Supporting with 10% of the costs of the installation of new greenhouses , through the FDA (Agricultural Development fund);• Conducting studies for the mobilization of irrigation water in the Souss-Massa-Draa region and supporting water-saving irrigation systems;• Marketing support and export promotion through the negotiation of agreements with partner countries;• Establishment of the inter profession of vegetables, supervising and training of producers.
The main commitments of the profession
<ul style="list-style-type: none">• Creation of a greenhouse expansion program on an area of 12 400 ha;• Rationalizing the use of irrigation water over an area of 28,000 ha. The ultimate goal is to generalize the drip irrigation system to 100% of the early season areas;• Valorisation of production through the adoption of quality certification systems at the level of production and packaging, as well as through the upgrading of existing packing stations;• Conducting a feasibility study on the marketing prospects for both export and domestic market;• Improving productivity and quality of vegetable production through strengthening the supervision and coaching of producers.
Data on the signed performance contract
Covered period : 209 - 200. Signatories representing the profession: Moroccan Association of Producers Exporters of Fruits and Vegetables (APEFEL), Association of Exporters and Producers and Moroccan Association of Conditioners Exporters of Strawberries (AMCEF)

Seeds
Baseline data
<ul style="list-style-type: none">• An annual turnover of 600 million MAD against a potential turnover of 27 billion MAD;• A main pillar for the upgrading of the agricultural sector through the dissemination of advances in genetics and effective fight against diseases.
Goals
<ul style="list-style-type: none">• Improving utilization of certified seeds for all plants to achieve 45% for cereals, 10% for legumes, 31% for fodder and 10% for sugar beets, sugar cane and maize;• Increasing the share of national production of certified seeds, mainly for vegetable crops.
Trends of upgrading
<ul style="list-style-type: none">• Strengthening and securing seed multiplication capacity;• Development and improvement of marketing conditions and research programs;• Harmonisation of regulations and tightening controls;• Making efforts for the control of the sector and the organization of the profession.
Investments
Total investment : 75 million MAD
The main commitments of the State
<ul style="list-style-type: none">• Assisting in the implementation of the aggregation projects laid out in the Regional Agricultural Plans as well as major seed projects;• Development and improvement of the conditions of storage and marketing;• Assigning a total budget of 10 million MAD to support the seed sector;• Strengthening the research and programs of protection of national plant genetic resources;• Creation of a national technical Seed centre;• Mobilizing an additional envelope of 75 million MAD for Training and Research.
The main commitments of the profession
<ul style="list-style-type: none">•Encouraging national and international investors to invest in the sector;• Realisation of investments needed to strengthen storage and packaging capacity;• Harmonization of regulations with international standards;• Support for activities related to assessment tests.
Data on the signed performance contract
Covered period : 2009 - 2020. Signatories representing the profession: Moroccan association of Seed Multipliers (AMMS) and Moroccan Association of Seeds and Plants (AMSP)



Fruit trees
Baseline data
<ul style="list-style-type: none">• Occupied total area of more than 265000 ha;• Average annual production of around 884000 t;• A wide range of tree species (almond, apple, apricot, plum, peach and nectarine) occupying more than 95% of the national area;• Exports relating particularly to early peaches, nectarines, apricots and plums;• Nearly 165000 permanent jobs;• A characterized value chain, in upstream, by a wide range of tree species, and a production sector dominated by extensively managed plantations, and as to the downstream, by valorisation units consisted essentially of cold storage warehouses, processing units and packing stations.
Gaols
<ul style="list-style-type: none">• Expanding the area of tree species targeted by the performance contract over nearly 60000 ha to raise the national area to 325000 ha by 200;• Intensifying the existing plantations over an area of 63000 Ha;• Conducting a fruit production of around 16 million t per year against 884000 t in 201;• Production of 20 million certified seedlings by 200;• Enhancing tonnages exported to 50000 t by 200;• Creating 40000 new permanent jobs to reach 205000 jobs by 200.
Trends of upgrading
<ul style="list-style-type: none">• Development of production and quality according to an integrated model;• Development of a strong and sustainable valorisation;• Development and promotion of exports;• Improvement of the framework conditions of the sector.
Investments
Total investment : 102 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Strengthening of the R & D;• Financial contribution and close local support;• Establishment of financial incentives within the framework of the FDA• Implementation of the provisions governing arboricultural sector;• Promotion of the sector;• Strengthening the technical supervision of producers.
The main commitments of the profession
<ul style="list-style-type: none">• Development of aggregation projects;• Development of the arboreal heritage;• Protection against weather conditions;• Improvement of the performance of existing orchards;• Strengthening the professional organization and R & D;• Sanitation of the domestic market and export promotion.
Data on the signed performance contract
Covered period : 201 - 200. Signatories representing the profession: Moroccan Federation of Arboriculture Development (FEDAM).

Perfume rose
Baseline data
<ul style="list-style-type: none">• In the Dades Valley, the rose occupies 320 line km as hedges or fences around agricultural plots, about 80 ha, or nearly 8% of the cultivated agricultural land.• The average annual production of fresh roses is 2000 t.• Morocco comes in third among global producers of perfume rose after Bulgaria and Turkey.• On average, a kilogram shall be 20 fresh roses. Getting 1 kg of essential oil requires 4 t of fresh roses.• Three existing processing units of industrial type and other artisanal units. Quantities processed industrially are estimated at 1000 t of fresh roses
Goals
<ul style="list-style-type: none">• Repopulating and densifying 20 ha over the existing 80 ha;• Increasing the area reserved to the cultivation of the rose of 40 ha, rising to 120 ha;• Increasing the production to 480 t / year of fresh rose instead of the present 2000 t;• Increasing the quantity processed to reach 380 t / year instead of the present 100 t;• Increasing the annual quantities exported as follows:<ul style="list-style-type: none">- Essential oil: 10 Kg to 20 Kg;- Concrete: from 250 Kg to 500 Kg;- Rose water: 10 t to 30 t.
Trends of upgrading
<ul style="list-style-type: none">• Development of production and quality improvement;• Improving the sector framework conditions;• Improving condition of valorisation, marketing and promotion of the rose.
Investments
Total investment : 10 million MAD
The main commitments of the State
<ul style="list-style-type: none">• Encouraging the production of quality seedlings;• Implementing collective water managements in agriculture including the development of séguias, diversion weirs and watertightness of canals;• Development and implementation of programs of mentoring, awareness and training aiming to the appropriation of optimal management orchards techniques;• Strengthening research and development work;• Strengthening marketing activities of the rose products.
The main commitments of the profession
<ul style="list-style-type: none">• Encouragement for the establishment of nurserymen multipliers;• Raising awareness of farmers to the establishment of water-saving irrigation systems in plots;• Extension of plantations;• Strengthening of training and mentoring programs;• Knowledge and technology transfer;• Strengthening marketing activities of the rose products ...
Data on the signed performance contract
Covered period : 2012 - 2020. Signatories representing the profession: Inter professional Federation of Moroccan Rose Perfume (FIMAROSE).

Saffron
Baseline data
<ul style="list-style-type: none">• The Moroccan saffron production, estimated at 3 t / year, representing about 1% of world production is nearly 250 t / year;• Saffron is exported to the EU, with a value of 35 million MAD in 209, mainly to Spain (614%), Switzerland (366%), France (12%), the Italy and other countries (08%).
Goals
<ul style="list-style-type: none">• Increasing the area reserved for the cultivation of saffron to go from 60 ha to 1350 ha by 200;• Improving the production of saffron to reach 9 t / year by 200;• Increasing the quantity processed and packaged to reach 6 t / year instead 0009 t;• Increasing the quantity exported to reach 6 t / year.
Trends of upgrading
<ul style="list-style-type: none">• Development of production and quality improvement;• Improving the sector framework conditions;• Improvement of the conditions of valorisation, marketing and promotion of Saffron.
Investments
Total investment : 10 million MAD
The main commitments of the State
<ul style="list-style-type: none">• Encouraging the production of quality bulbs;• Achievement of collective water management in agriculture involving digging wells / boreholes, their junction to the grid and their pumping equipment in equipment, storage basins and water supply facilities to the parcels;• Strengthening of training and mentoring programs;• Strengthening research and development work;• Strengthening of marketing actions of saffron products...
The main commitments of the profession
<ul style="list-style-type: none">• Encouragement for the establishment bulbs multipliers;• Awareness of farmers to use quality bulbs;• Raising awareness of farmers to the establishment of water-saving irrigation systems in plots;• Strengthening of training and mentoring programs;• Knowledge and technology transfer;• Strengthening of marketing actions saffron products...
Data on the signed performance contract
Covered period : 2012 - 2020. Signatories representing the profession: Moroccan Interprofessional Federation of Safran (FIMASAFRAN) .



Argan
Baseline data
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>The argan forest covers an area of 800000 ha of forest area and includes approximately 21 million argan trees. The occupied space along the Atlantic coast from Safi to Tiznit in continental penetration up to Taroudant to the East. Argan isolated colonies are also found in the Northeast of Morocco, on the side of Oujda, in the mountains of Beni Snassen.</div><div>The argan forest is the second forest species in the country</div></div></div></div>
Goals
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Rehabilitating 200000 ha of the argan forest;</div><div>Domesticating the argan tree and spreading its cultivation in modern management over 5000 ha;</div><div>Increasing the production of argan oil to 10000 t / year by 200 instead of 400 t / year;</div><div>Implementing projects of Pillars I and II for a modern and efficient promotion and valorization of the products of the argan tree;</div><div>Defending the uniqueness of ‘Morocco Label’ of the argan tree and all its products and derivatives on the international market.</div></div></div></div>
Trends of upgrading
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Emergence of an integrated R & D competence pole dedicated to the argan tree;</div><div>Sustainable development of the production and quality according to an integrated model preserving the argan forest and its natural resources;</div><div>Development of a strong and sustainable valorisation;</div><div>Improving the sector framework conditions.</div></div></div></div>
Investments
Total investment : 281 billion MAD
The main commitments of the State
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Endowment of the argan sector with the infrastructures necessary to promote a proximity and local research;</div><div>Development and implementation of a research program dedicated to the sector of the argan;</div><div>Establishment of an information system on the argan;</div><div>Improving the performance of the existing argan forest;</div><div>Mobilization of water resources;</div><div>Development of intensive argan poles;</div><div>Development of R & D specific to the argan tree;</div><div>Transfer of technology and support...</div></div></div></div>
The main commitments of the profession
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Installation of modern argan plantations;</div><div>Establishment of an information system on the argan;</div><div>Improving the performance of the existing argan forest;</div><div>Valorisation of production;</div><div>Strengthening the argan interprofession;</div><div>Strengthening the supervision and mentoring of producers...</div></div></div></div>
Data on the signed performance contract
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Covered period : 201 - 200.</div><div>Signatories representing the profession: Moroccan Interprofessional Federation of the chain of Argan (FIMARGANE) and National Federation assigned the use of Argan .</div></div></div></div>

Cereals
Baseline data
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>The sector occupies a major place in the agricultural economy:</div><div>Major agronomic and economic importance: 75% of the UAA, excluding the fallow, 10 to 20% of the agricultural GDP with strong fluctuations depending on rainfall and about 70% of agricultural imports (Nearly 8 billion MAD).</div><div>Major social weight for a fragile network of producers: predominant cultivation for almost all of the farms.</div><div>Paramount importance in consumption:</div><div>- Very high Human consumption with home consumption reaching almost 30% of the volumes produced;</div><div>- Strong contribution to the animal consumption resulting in very marked interdependence between cereal crops and livestock.</div></div></div></div>
Goals
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Achieving, by 200, a cereal production base of around an average 7 million t per year for an area of about 42 million ha;</div><div>Raising the turnover to 20 billion MAD by the year 200;</div><div>Reducing imports from 15% to 20%.</div></div></div></div>
Trends of upgrading
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Productivist redesign of the upstream of the sector around the aggregation;</div><div>Development of the cereal mid-stream;</div><div>Restructuring of the downstream of the sector;</div><div>Gradual revision of the regulatory mechanisms and supervision of the sector.</div></div></div></div>
Investments
Total investment : 26 billion MAD
The main commitments of the State
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Development of productivist and social aggregation projects (Pillars I and II of the Green Morocco Plan);</div><div>Support for the generalization of the use of high performance inputs and mechanization;</div><div>Promoting the emergence of 2 to 3 Cereal mid-stream operators at national level;</div><div>Development of agricultural insurance and R & D;</div><div>Consolidation and sectoral restructuring of industrial milling;</div><div>Support for the upgrade of the second processing;</div><div>Establishment of a commodities exchange.</div></div></div></div>
The main commitments of the profession
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Realization of productivist projects;</div><div>Support for the emergence of mid-stream actors;</div><div>Upgrading of the second processing;</div><div>Contribution to the process of revision of the compensation system within the sector;</div><div>Organization of all distribution networks throughout the value chain;</div><div>Animation, technical coaching and training of actors in the cereal sector;</div><div>Mobilisation of resources for the development of the profession.</div></div></div></div>
Data on the signed performance contract
<div><div><div><div><div><div></div></div></div><div><div><div></div><div></div></div></div><div><div><div></div></div></div></div></div><div><div><div>Covered period : 2009 - 2020</div><div>Signatories representing the profession: the Federation Interprofessionnelle of cereals activities (FICA).</div></div></div></div>

Organic Production
Baseline data
<ul style="list-style-type: none">• Cultivated area for the season 201011: 380 ha and production of 40000 t;• Area of spontaneous plantations : nearly 618700 ha, mainly represented by the argan forest (400000 ha), aromatic and medicinal plants (200000 ha) and cactus (20000 ha);• Exports: 900 T, 830 T of fresh products and 70 T of processed products;• Employment: one million working days;• Contribution to foreign currency through exports: 10 million MAD.
Goals
<ul style="list-style-type: none">• Achieving a total area of 40000 ha for a plant production of 400000 t (including 60000T for export) and livestock production of 8500 t;• Creating 9 Million of workdays which is the equivalent to 35000 permanent jobs;• Generating a total amount in foreign currency equivalent to 80 million DH;• Increasing the consumption of organic products at the domestic market level.
Trends of upgrading
<ul style="list-style-type: none">• Development of the research - development component;• Improvement of the conditions of valorisation, marketing and promotion of organic products in the domestic market;• Development and promotion of the export sector;• Improvement of the framework conditions of the sector.
Investments
Total investment : 1121 billion MAD
The main commitments of the State
<ul style="list-style-type: none">• Strengthening and developing programs of research-development and transfer of technology;• Marketing support in the domestic market;• Support for export promotion;• Establishment of a legislative and regulatory framework governing organic production;• Encouraging the production and export;• Training and technical assistance for professionals;• Upgrading the professional organization.
The main commitments of the profession
<ul style="list-style-type: none">• Development of research - development programs aimed at increasing productivity, compression of production costs and improving the quality and competitiveness;• Promotion of marketing in the domestic market;• Export development;• Strengthening the technical assistance of professionals;• Establishment of the interprofession.
Data on the signed performance contract
Covered period : 2011 - 2020 Signatories representing the profession: Moroccan Industries Association of biological productions .




Oilseed crops
Baseline data
<ul style="list-style-type: none">• An average covered area of 44000 ha / year of sunflower with an annual production of 48000 t and an average yield of 11 Quintals/ Ha;• An average volume of 19000 T delivered to oilseed processors allowing to cover less than 15% of annual requirements for edible oil;• An average production of edible oil of 800 t per year;• An overall crushing capacity of 700000 t and a global refining capacity of 700000 t / year.
Goals
<ul style="list-style-type: none">• Progressive extension and diversification of the area conducted annually in oilseed crops to reach 127000 ha of which 85000 ha of sunflower and 42000 ha of rapeseed;• Improving yields to reach an average of 18 quintals / ha for sunflower against 11 quintals / ha at present and 20 quintals / ha for rapeseed;• Improving the production of edible oil to reach 93000 t in 200 against an average of 8000 t at present;• Increasing the rate of coverage of oil needs from domestic production to reach 19% in 200 against the current average 15%.
Trends of upgrading
Upgrading the agricultural upstream <ul style="list-style-type: none">• Extension of the areas especially in high potential production areas with species diversification;• Intensification and improvement of productivity through the adoption of appropriate crop management, technical supervision, training and agricultural consulting;• Establishment of an insurance against the effects of natural disasters;• Strengthening of programs of applied research, coaching, and training adapted to the needs of the sector;• Aggregation Project Development. Improvement of the downstream of the sector <ul style="list-style-type: none">• Improving collection conditions through the installation of receipt and control units in the production areas;• Improvement of the conditions of control and payment;• Upgrading and modernization of industrial tools. Improvement of upstream-downstream relational framework <ul style="list-style-type: none">• Establishment of a framework for consultation and coordination between the various stakeholders in implementation of the law regarding the interprofession;• Establishment of an agreement that defines the relational framework between producers and crushers;• Coaching and strengthening of the capacities of provincial and regional associations of producers and their national association.
Investments
Total investment : 41 million MAD
The main commitments of the State
<ul style="list-style-type: none">• Support, through the Agricultural Development Fund, of the agricultural upstream and downstream of sector;• Support of the profession in the implementation of aggregation projects;• Extension of the benefit of multirisk weather insurance to oilseed crops;• Supporting the profession in improving the conditions of marketing and collection of production;• Maintenance of the current system of compensatory payment for oilseeds;• Supporting the profession in boosting the professional organization;• Contribution to the strengthening of research and development activities in the area of oilseeds;• Contribution to the development of practical training programs and development of managerial staff.
The main commitments of the profession
<ul style="list-style-type: none">• Implementation of a program of extension of the areas at the level of the potential regions;• Improving the technical management of oilseed crops;• Promoting the implementation of projects of producers' aggregation and the establishment of contracts of cultivation or aggregation between oilseed processors and representatives of producers;• Establishment, in consultation with the government, of an insurance against the effects of natural disasters on the production of oilseed crops;• Revalorisation of prices of production of oilseeds;• Improvement of the conditions of collection, system of receipt, control of conformity and payment of the production.• Preservation and continued operation of the existing industrial production capacity by giving priority to domestic production of oilseeds;• Reinforcement of the interprofession ;• Strengthening of the research-development and the training.
Data on the signed performance contract
Covered period : 203 - 200 Signatories representing the profession: Interprofessional oilseeds Federation (IOF)

Rice sector
Baseline data
<div><ul style="list-style-type: none">• Potential Area: 14000 Ha• Average area sown in the last 5 years: 6500 ha / year• Production: 50000 t• Direct revenue for 250 farmers• Creation of 150000 working days / year, of which 450000 working days in downstream• Downstream: Existence of six rice mills installed in the Gharb and Loukkos, of which five operational ones• Average Exports of rice: 2000 t / year• Average imports of 4700 t / year</div>
Goals
<div><ul style="list-style-type: none">• Improving the yields to reach an average of 80 quintals / ha against 70 quintals / ha at present;• Progressive extension of areas conducted annually to stabilize them at 11000 ha against 6500 ha at present;• Diversification of varieties sown for the three types of rice: Round Long and Medium• Improving the quality of the rice produced;• Improving the conditions of the domestic rice market.</div>
Trends of upgrading
<div><ul style="list-style-type: none">• Improving the profitability of the crops;• Modernization of the industrial equipments;• Improving the framework conditions of the sector.</div>
Investments
Total investment : 20 million MAD
The main commitments of the State
<div><ul style="list-style-type: none">• Levelling of rice fields;• Support for the use of seeds and harvesting equipment;• Subsidy for warehousing;• Upgrading of the valorisation units;• Support for the research -development;• Promotion of consumption;• Encouraging the aggregation;• Creation and maintenance of tracks.</div>
The main commitments of the profession
<div><ul style="list-style-type: none">• Levelling of rice fields;• Development of aggregation projects;• Modernization of the valorisation equipment;• Implementation of research –development programs;• Revitalization of the professional organization;• Improvement of the marketing conditions;• Promotion of consumption.</div>
Data on the signed performance contract
<div><p>Period covered : 204 – 200.</p><p>Signatories representing the profession: Interprofessional Rice National Federation (IRNF).</p></div>



Sugar
Baseline data
<div><ul style="list-style-type: none">• A local production of sugar covering almost 43% of the country's needs;• A sector representing 9 million seasonal working days per year;• Approximately 80000 farmers cultivating areas of less than one hectare;• A sugar industry composed of 5 companies belonging to the COSUMAR group.</div>
Goals
<div><ul style="list-style-type: none">• The gradual extension of the area achieved annually in 70600 hectares of sugar crops to reach 105700 ha of which 77500 ha of sugar beet against 54200 ha, and 28200 ha of sugarcane against 16400 ha;• Improving the yields to reach an average of 64 t / ha against 54T / ha for Beet and 80T / ha against 66 t / ha for sugar cane;• Improving the sugar yield per hectare to 11T / ha against 85T / ha for beet and 96 T / ha against 72T / ha for sugar cane;• Improving the production of white sugar to reach 856000 against 40 T 00T;• Improving the coverage to 62% against an average of 35%;• Improving the effective capacity of sugar handling, which will increase from 42500 t / d currently to 62500 t / day by 200.</div>
Trends of upgrading
<div><ul style="list-style-type: none">• Upgrading of the agricultural upstream through area expansion, promoting water saving, improving agronomic performance of sugar crops and improving the conditions of the crop and its transport;• Upgrading the downstream of the sector through the development and modernization of production facilities and the improvement of the system of receipt and control of the conformity of the productions• Improving the framework conditions of the sector by strengthening the producers-industrials relational framework, encouragement and reinforcement of aggregations projects, coaching and strengthening of the capacities of the regional associations, encouraging service providers and updating of the prices of sugar plants.</div>
Investments
Total investment : 76 billion MAD
The main commitments of the State
<div><ul style="list-style-type: none">• Integration of sugar plants among the priority crops into new perimeters of the large hydraulic to be developed;• Continued subsidies granted to monogerm seed of beets, agricultural equipment specific to sugar crops and to water-saving irrigation systems;• Granting subsidy for an installation of new sugarcane plantations 6000 DH / ha;• Promotion of the aggregation projects;• Financial contribution to the implementation of research and development and training programs;• Contribution to the rehabilitation of tracks at the sugar-producing areas;• Financial contribution to the Solidarity Fund for natural disasters or exceptional events affecting production of sugar plants.</div>
The main commitments of the profession
<div><ul style="list-style-type: none">• Supervising and mentoring producers to improve the technical management of cultivation;• Progressive extension of areas;• Progressive development of aggregation projects in the context of the generalization of this organizational system;• Improving the conditions of collection, receipt, control of the conformity and payment;• Establishment of a solidarity fund to face the impacts of natural disasters and exceptional events• Upgrading and modernization of industrial equipment and production facilities.</div>
Data on the signed performance contract
<div><p>Covered period : 203 – 200</p><p>Signatories representing the profession: Moroccan Interprofessional Federation of Sugar (FIMASUCRE).</p></div>

<p>Milk sector</p> <ul style="list-style-type: none"> • A national milk production which was raised from 17 billion litres in 209 to 23 billion litres in 203; • A sector that creates 460000 permanent jobs; • Low productivity of milk all breeds of approximately 180 kg / cow / year. <p>Goals</p> <ul style="list-style-type: none"> • Improving the conditions of access to milk and dairy products for the consumers to reach 30 to 40 g / day / capita by 200; • Achieving self-sufficiency in dairy raw material; • Creation of 40000 permanent jobs. <p>Trends of upgrading</p> <ul style="list-style-type: none"> • Productivist redesign of the upstream of the dairy industry around the aggregation, including support for the development of models productivist farms; • Development of the downstream of the milk sector by supporting the creation of new projects; • Improving the sector framework conditions. <p>Investments</p> <p>Total investment : 12 billion MAD, of which 2 billion contribution from the state</p> <p>The main commitments of the State</p> <ul style="list-style-type: none"> • Productivist redesign of the upstream of the sector around the aggregation: <ul style="list-style-type: none"> - Promoting investment in livestock units by the financial support under the FDA for the installation of livestock units, achieving genetic improvement programs and the acquisition of imported heifers; - Upgrading producers through training and coaching; • Development of the downstream of the sector by promoting investment; • Promotion of consumption and quality of milk; • Implementation of the generalized identification of cattle; • Training and supervision in the interprofessional technical centre: Zoopole. <p>The main commitments of the profession</p> <ul style="list-style-type: none"> • Development of milk production to reach 45 billion litres by 200; • Realisation of investments in the production and processing of milk; • Upgrading of producers and realization of genetic improvement programs; • Upgrading health and hygiene and promoting the quality of the milk; • Development of the downstream of the sector through the creation of new production units, processing and valorisation of milk; • Upgrading human resources and implementation of information systems; • Contribution to programs of R&D. <p>Data on the signed performance contract</p> <p>Covered area: 2009 - 2014.</p> <p>Signatories :</p> <ul style="list-style-type: none"> • Representing the profession : Moroccan Interprofessional Federation of Milk (FIMALAIT). • Government : Ministry of economy and finance Ministry of Agriculture and Maritime Fisheries 	
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<p>Poultry sector</p> <p>Baseline data</p> <ul style="list-style-type: none"> • The sector is characterized by the existence of two production modes: traditional farm production and intensive modern production, representing respectively 13% and 87% of national production; • Production which goes up from 440000 t of meat and eggs 31 billion in 209, to 495000 t of meat and 45 billion eggs in 203; • A consumption per capita and per year of 159 kg of meat and 16 eggs in 203; • The investments made in the area of nearly 10 billion MAD in 203; • A turnover of 298 billion MAD in 203; • A job creation of around 360000, with 110000 direct jobs in Production units and 250000 indirect jobs in the circuits of distribution and marketing
<p>Goals</p> <ul style="list-style-type: none"> • Ensuring food security in Morocco of animal protein; • Modernisation of animal farming units, installation of valorisation structures of poultry products and development of aggregation and Integration models; • Creation of new 140000 jobs from now up to the year 200; • Improving the efficiency of the sector's competitiveness and supply on the market; • Diversification of poultry production through the development of alternative animal farming to reach 11% of the total production, that is, 100000 t by 200; • Increasing the exported quantities of poultry products from 40 t in 200 to 4400 t in 200.
<p>Trends of upgrading</p> <ul style="list-style-type: none"> • Strengthening of modern poultry farming, development of models of aggregation and integration and development of poultry products; • Improving the sector framework conditions.
<p>Investments</p> <p>Total investment : 3762 billion MAD, of which 70 million contribution from the state</p>
<p>The main commitments of the State</p> <ul style="list-style-type: none"> • Promotion of investment in modern poultry farming, the development of models of aggregation and integration and enhancement of poultry products (slaughterhouses and valorisation units): <ul style="list-style-type: none"> - Credit Dawajine: State support: 3% of the interest rate which increased to 6%) - Grants within the framework of the FDA (Agricultural Development Fund): installation of livestock units and upgrading existing units through providing them with equipments , installation of alternative animal farming units, installation and upgrading of industrial slaughter and cutting structures and packaging units and valorisation of the eggs for consumption and export of poultry products. • Promotion of the industry: Compensation for the slaughter of poultry following animal diseases or as part of health measures and health sanitation programs; • Contribution to the achievement of R&D programs; • Contribution to the promotion of consumption and quality of poultry products; • Training and supervision of the interprofessional technical centre: Zoopole.
<p>The main commitments of the profession</p> <ul style="list-style-type: none"> • Increasing production and consumption to reach 900000 t of poultry and 72 billion eggs for consumption in 200; • Creation of 80000 direct jobs and 60000 indirect jobs; • Improving the skills and productivity of stakeholders; • Establishment of insurance against natural disasters; • Stabilizing the channels of marketing and valorisation; • Regulation of poultry products markets; • Dissemination of avian diseases between animal farms.
<p>Data on the signed performance contract</p> <p>Covered period : 2011 - 2020.</p> <p>Signatories :</p> <ul style="list-style-type: none"> • Representing the profession : Interprofessional Federation of Poultry Sector (FISA) • Government : Ministry of economy and finance <p>Ministry of Agriculture and Maritime Fisheries</p>

Camel sector
Baseline data
<ul style="list-style-type: none">• Number of camels amounting to about 220000 head in 203, 90% of herds exists in the southern provinces of the Kingdom;• Concentrated animal farming lands mainly in the southern provinces of Guelmim-Essmara, Laayoune Boujdour Sakia Al Hamra and Oued Eddahab_Lagouira;• A camel farming activity having great importance at the economic, social, cultural and tourism levels.
Goals
<ul style="list-style-type: none">• Development of production lines to reach 4860 t of meat and 10200 t of milk by 200;• Promotion of investment and job creation;• Encouragement of the valorisation of camel productions and introduction of labels to improve animal farmers' income;• Improving the productivity and quality of milk and camel meat;• Improvement of health conditions of the camel herd;• Support and guidance for farmers in the framework of professional organizations for the upgrade of the camel industry.
Trends of upgrading
<ul style="list-style-type: none">• Development of camel farming;• Improvement of general conditions of production;• Improvement of camel farming and production conditions.
Investments
Total investment: 72 million MAD, of which 40 million contributions from the state.
The main commitments of the State
<ul style="list-style-type: none">• Investment Support:<ul style="list-style-type: none">- Incentives within the framework of the FDA (Agricultural Development Fund): acquisition of breeders and construction of shelter for camels;- Development of the sector through the creation and equipment of milk collection centres, supporting integrated projects of collection and valorisation of camel milk, development of camels commercialisation market, the construction of two quarantine centres , range management and organization of fairs and livestock competitions.- Identification of camels;- Promotion of consumption and quality of camel products;- Implementation of R & D programs in collaboration with IAV, ENAM and INRA.
The main commitments of the profession
<ul style="list-style-type: none">• Investment in the animal farming projects and projects of production, marketing and valorisation of meat and milk of camels;• Strengthening of the professional organization;• Promotion of employment;• Upgrading of the producers;• Increasing the level of productivity and consumption;• Organization of markets for the sale of camels;• Promoting the quality of camel products.
Data on the signed performance contract
Covered period : 2011 - 2020. Signatories : <ul style="list-style-type: none">• Representing the profession : Regional chambers of agriculture of 3 regions :<ul style="list-style-type: none">- Laâyoune Boujdour Sakia Al Hamra- Oued Eddahab-Lagouira- Guelmim Essmara• Government : Ministry of economy and finance Ministry of Agriculture and Maritime Fisheries



Beekeeping
Baseline data
<ul style="list-style-type: none">• Significant honey resources (forests of eucalyptus, citrus and rosacea, forage crops) Providing the potential to produce more than 50000 t of honey per year;• The numbers of hives that rose from 370000 hives (250000 traditional and 120000 modern) in 209 to 528000 hives (175000 traditional and 353000 modern) in 203;• An economic importance shown by the production of 4500 t of honey and 30 t of wax in 203.
Goals
<ul style="list-style-type: none">• Promoting the investment and the creation of 40000 new jobs;• Encouraging the valorisation of bee products for better added value (local terroir products, labelling ...)• Improving the productivity and competitiveness of the sector;• Contribution to rural development and improvement of farmers' income;• Promoting the quality of bee products;• Development of pollination services;• Guaranteeing the durability and sustainability of production systems and the preservation of environmental and biodiversity balance.
Trends of upgrading
<ul style="list-style-type: none">• Development of modern productive apiarian units, social aggregation and valorisation of bee products;• Improving the sector framework conditions.
Investments
Total investment: 148 billion MAD, of which 38 million contributions from the state
The main commitments of the State
<ul style="list-style-type: none">• Investment Promotion<ul style="list-style-type: none">- Support within the framework of the FDA: Development of modern beekeeping units, aggregation and valorisation of bee products.• Promotion of the sector through:<ul style="list-style-type: none">- Protection and development of the Saharan bee;- The contribution to the achievement of media campaigns on the quality and consumption of bee products;- The contribution to the achievement of R&D programs;- Health protection of hives;- Strengthening and upgrading of the professional organization;- Identification of hives.
The main commitments of the profession
<ul style="list-style-type: none">• Production Development to reach 16000 t in 200;• Increasing the investments for the creation of beekeeping units of production and valorisation;• Creation of 40000 new jobs;• Promotion of consumption and quality of bee products;• Upgrading the interprofession and human resources.
Data on the signed performance contract
Covered period : 2011 - 2020. Signatories : <ul style="list-style-type: none">• Representing the profession : Moroccan Interprofessional Federation of Beekeeping• Government : Ministry of economy and finance Ministry of Agriculture and Maritime Fisheries

Red meat
Baseline data
<ul style="list-style-type: none">• A self-sufficiency in red meat up to 98% of consumption;• A production which increased from 386000 t in 208 to 490000 t in 203;• A national consumption of red meat rising from 82 kg / person / year in 208 to 142 kg / person / year in 203;• A significant infrastructure: private slaughterhouse and approved intercommunal slaughterhouse, 12 municipal slaughterhouses, 21 cutting units and 50 establishments of meat-based products processing;• An annual turnover of around 25 billion MAD.
Goals
<ul style="list-style-type: none">• Integration of the sector into the international economic environment;• Encouragement of investment and the creation of new jobs;• Promoting quality through improving the technical and health conditions of production, processing, marketing and transportation of meat and meat-based products;• Contribution to rural development and improving animal farmers income;• Increasing the production of the red meat industry and ensure the country's supply of animal protein.
Trends of upgrading
<ul style="list-style-type: none">• Development of the upstream of the sector :<ul style="list-style-type: none">- Support for genetic improvement;- Development of modern units of farming of cattle, sheep and goats.• Development of the downstream of the sector :<ul style="list-style-type: none">- Increasing the production and consumption;- Support for the development and marketing of live animals and meat.• Improving the sector framework conditions:<ul style="list-style-type: none">- Upgrading of the interprofession;- Support for professional organizations;- Promotion of consumption and quality of meat.
Investments
Total investment: 5 billion MAD, of which 145 billion contributions from the state.
The main commitments of the State
<ul style="list-style-type: none">• At the upstream sector: Support within the framework of the FDA (Agricultural Development Fund) for the installation of livestock units, achieving programs for genetic improvement of sheep and goats, production of crossbred calves and investment in animal farming units.• At the downstream sector: supporting the valorisation and marketing of animals and meat (souks, slaughterhouses, cutting and distribution units)• Contribution to the achievement of the programs of quality promotion and consumption of meat• Contribution to the implementation of the programs of R&D• Support for the implementation of training programs in zoopole• Realization of SNIT program (National System of Animal Identification and Traceability) (generalized identification of cattle).
The main commitments of the profession
<ul style="list-style-type: none">• Production Development to reach 612000 t in 200• Implementation of genetic improvement programs (sheep, goats and cattle)• Strengthening investments in the production and valorisation structures;• Creation of additional jobs estimated at more than 80000 jobs;• Reduction of production costs of about 10 to 15%;• Improvement of the market organization conditions and establishment of appropriate information systems.
Data on the signed performance contract
Period covered : 2014 - 2020. Signatories : <ul style="list-style-type: none">• Representing the profession: Interprofessional Federation of Red Meat (FIVIAR)• Government : Ministry of Interior Ministry of economy and finance Ministry of Agriculture and Maritime Fisheries



Local Products and Labelling

In implementation of the development strategy of the local products, the programs and actions below are currently being implemented:

- Development of the upstream through:
 - Training of production stakeholders for the consolidation of the achievements and the improvement of the conditions of production, valorisation and diversification of products according to the standards of good practice and applicable regulations related to quality and health safety
 - Strengthening the organization of production stakeholders
 - The development of the value chain through the upgrade focused on support and direct backing to producer groups
 - The development of the tourism market for the local products through the implementation of an integrated development program with three-year action plans.
- The establishment of fair aggregation partnerships:
 - Development of quantitative supply and improving the qualitative offer of products;
 - Establishment of aggregation partnerships for solidary marketing of products;
 - Launching of an aid and coaching program for upgrading groups and cooperatives.
- Creation of regional logistics hubs close to the producers:
 - Launching of pilot projects of logistics hubs in Meknes, Al Hoceima and Agadir.
 - Establishment of unique contact points with the aggregators and supermarkets and hypermarkets across the massification of flows.
- Establishing agreements with supermarkets and hypermarkets:

- Facilitating access to modern distribution networks;
- Helping the cooperatives to gain market shares through active promotion of local products.
- Construction of multichannel institutional campaigns to establish the reputation of local products to the general public on the national and international market.
- Continuing the efforts regarding the labelling of agricultural and fishery products.

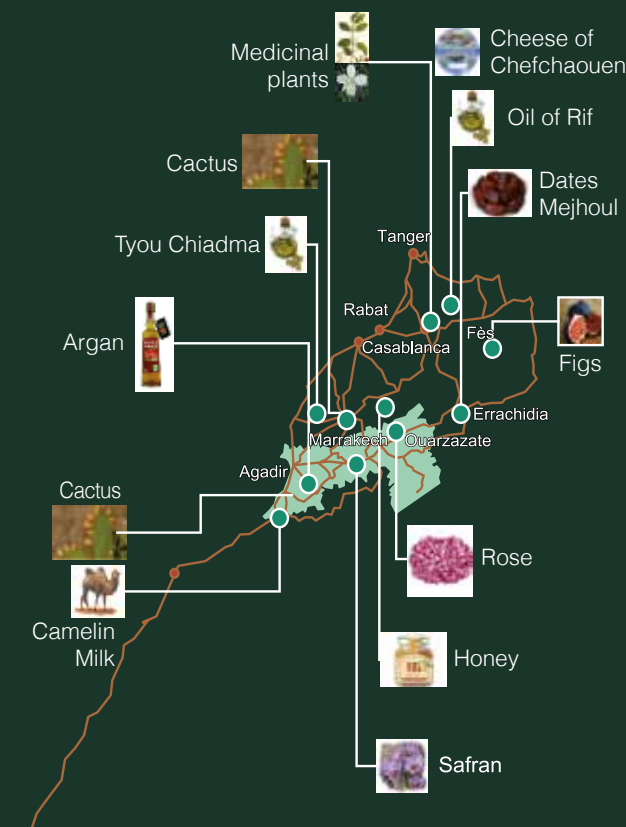
In addition, since the entry into force of Law No. 2506 and its implementing regulations, the number of labelled products whose orders of recognition are published in the Official journal amounts to 27; these labelled products are as follows:

- the Protected Geographical Indication (PGI) 'Argane «registered by the Moroccan Association of the Geographical Indication of Argane Oil in the regions of Souss Massa Draa, Marrakech Tensift El Haouz, Doukkala Abda and Guelmim-Essmara;
- the Protected Designation of Origin (PDO) «Olive Oil Tyout - Chiadma» registered by Tyout cooperative of production and marketing of olive oil in the region of Marrakech Tensift El Haouz;
- the PGI "Clementine of Berkane «registered by the Association of Protected Geographical Indication of Clementine of Berkane in the oriental region;
- the PDO "Saffron Taliouine «registered by the Regional Council of Souss Massa Draa in the region of Souss Massa Draa;
- the PGI "Dates Majhool of Tafilalet «registered by the Oasis Tafilalet Association for the valorisation of terroir Products and Promotion of Organic Agriculture in the region of Meknes Tafilalet;
- the Agricultural Label (AL) «Suckling Lamb « registered by the National Sheep and Goats Association;
- the PGI "Lamb Meat Beni Guil «registered by the National Sheep and Goats Association in the oriental region;

- the PGI "Pomegranate Sefri Ouled Abdellah «Registered by the Abdliya Association for the Production and Marketing of Ouled Abdellah Pomegranates in the region Tadla Azilal;
- the PGI "Goat Cheese Chefchaouen «registered by the National Sheep and Goats Association in the region of Tangier Tetouan;
- the PGI "Prickly Pear Ait Baamrane «registered by the Economic Interest Group (EIG) Cactus Aït

Baamrane in the regions of Souss Massa Draa and Guelmim-Essmara;

- the PDO "Rose Kelâat M'Gouna-Dades «registered by the Regional Office of Agricultural Development of Ouarzazate in Souss Massa Draa;
- the PGI "Dates Aziza Figuig «registered by the Agricultural Cooperative El Massira in the eastern region;



- the PGI “Almond Tafraout «registered by the Economic Interest Group Taddart N'louz in the region of Souss Massa Draa;
- the PGI “Dates Boufeggous «registered by the National Federation of Date Producers in the regions of Souss Massa Draa, Guelmim-Essemara, the Oriental and Meknes Tafilalet;
- the PGI “Euphorbia Honey Tadla-Azilal «registered by Union of Apiarian Cooperatives TADLA AZILAL (UCATAZ) in the region of Tadla Azilal;
- the PGI “Apple of Midelt «registered by the Midelt Apple producers Association (APPM) in Meknes Tafilalet;
- the PGI “Extra Virgin Olive Oil Ouezzane «registered by the Economic Interest Group «Women of the Rif» in the region of Tangier Tetouan;
- the PGI “Arbutus Honey Jbal My Abdessalam «registered by the Union of Apiarian Cooperatives Kotb Moulay Abdessalam in the region of Tangier Tetouan;
- The PGI “Dates Bouittob of Tata «registered by the Agricultural Cooperative Taskala in Guelmim-Essemara region;
- The PGI “Medlars of Zegzel «registered by the Medlars oued Zegzel cooperative in the Oriental region;
- The PGI “Keskes Khoumassi «registered by the Cluster of the Saharan oases in the regions of Guelmim-Essemara, Laayoune-Boujdour-Sakia El Hamra and Oued Ed-Dahab;
- The GI «Capers of Safi» registered by Safi Provincial Association of Capers Producers in Doukkala Abda region;
- The DO «Essential Oil of Lavendin Oulmès» registered by the Al Khozama Cooperative of Aromatic and Medicinal Plants in the Rabat-Salé-Zemmour Zaer;
- The DO «Extra Virgin Olive Oil Ghmat Aylane» registered

by the Aylane Association for the Development of terroir products of rural districts Ourika, Ghmat Tamazouzt and in the region of Marrakech Tansift El Haouz;

- The GI «Grape Doukkali» registered by the Economic Interest Group Mountiji Al Ainab Doukkali in Doukkala Abda region;
- The GI «Nuts of Azilal» registered by the Ait Bouguemmez Agricultural Cooperative of Agricultural Producers in the Tadla Azilal region;
- The GI «Dates Jihel Draa» registered by the National Dates Producers Federation (FENAPROD) in the regions of Souss Massa Draa and Guelmim-Essemara.

In addition, two products are currently being labelled; they are:

- The GI « Essential Oil of the Oriental Rosemary « registered by the Regional Directorate of Water and Forests and Desertification Control of the Oriental in the Oriental region;
- The GI «Dried Rosemary Leaves Oriental» filed by the Regional Directorate of Water and Forests and Desertification Control of the Oriental in the Oriental region;

However, the national potential of the production of local ‘terroir’ products remains important given the richness of the offer identified by region and this is shown in the following map and chart:



Region	Some key products
Oued Eddahab - Lagouira	L'frik, Loudek, milk, cheese and meat of camels
Laâyoune -Boujdour - Sakia Al Hamra	Couscous, L'frik,Loudek, milk and meat of camels
Guelmim - Es Smara	Prickly pear, cactus products, Henna of Tata, milk of camels, date of Boutoub, Euphorbia honey, Couscous, cereals of spate irrigation and argan products
Souss - Massa - Drâa	Dates, Almond, honey, henna, Saffron, Rose, argan products, pricly pear Ait Baamrane, Saffron, aromatic and medicinal plant (AMP), banana of Tamri and lamb meat Saghro and Siroua.
Chaoui -Ouardigha	Orange Zghiri, chamomile, honey, couscous, table olive and AMP.
Marrakech -Tensift - Al Haouz	Cactus Rhamna, Pomegranate Skhour, Iris, wine of Iggout, argan products, olive oil, mint felliouia, verbena of Ghmat, okra of Aloudane, citrus limetta of Marrakech, fennel, cumin, azembou, honey and almond of Hha and walnut of Atlas
Oriental	Rosemary honey, medlar, Date AZIZA Bouzid, Truffle, Clementine of Berkane, lamb meat Beni Guil, aromatic and medicinal plants, olive oil of Driouech and Quicotte, goat cheese of Tafoghalt and essential oil of rosemary

Region	Some key products
Grand Casablanca	Quince, mint Tamarisk, prickly pear Mejdoubia and Hddaouia and hot pepper of Oued El Maleh.
Rabat - Salé -Zemmour - Zaêr	Muscat grape, extra fine green bean of Skhirat, truffle, lavender, kid (young goat), flavoured couscous and honey.
Doukkala - Abda	Caper of Safi, white truffle, fig ould frej, Doukkali grapes and argan products.
Tadla - Azilal	AAlmond, euphorbia honey of Azilal, wine, aromatic and medicinal plants, and pomegranate of sefrou
Meknes -Tafilalet	Cherry of Ain Leuh, kid, honey of Rich, lamb meat of Timahdit, Dtaes Majhoul, olive oil of Zerhoun, Apple of Midely, Grape of Kerrouchen and green anise of Agourai.
Fes - Boulemane	Olive oil, onion Guigou, turnip of Missour, watermelon, honey, endive of Immouzzar, fig Chaari and apple.
Taza - Taounate - Al Hoceima	Almond, caper, prickly pear Dellahia, green pea of Ait Kamra, honey of Al Hoceima, fig of Bouadel and aromatic and medicinal plants
Tanger-Tetoun	Olive oil, fig, honey, samet or grape extract, goat cheese and aromatic and medicinal plants

Valuation of Agricultural Production

Post harvest units

Refrigerated warehouses :

In 2010, the total number of cold storage warehouses was about 50 units spread over the entire country, with a marked concentration in the Grand Casablanca (25%), the Souss-Massa-Draa (18%), the Middle Atlas (11%) and the Oriental (7%). The distribution of these warehouses according to their use and the installed capacity, in tonnage and volume, is as shown in the following table.

Use	Number	Capacity	
		t	m³
Fruits and Vegetables	258	243 903	1 275 148
Meat	27	6 644	30 583
Fishes	107	52 439	177 901
Various products	103	70 428	199 283
Total	495	373 414	1 682 915

Distribution of cold storage warehouses according to capacity and use

Cereal storage units:

In 200, the cereal storage capacity in Morocco, except for flourmills and ports, reached 42 million quintals. It is distributed as follows:

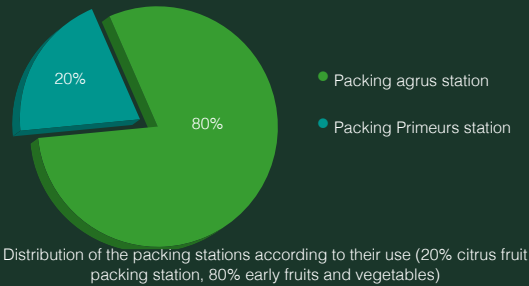
- Storehouses: 80% of units and 56% of installed capacity;
- Silos: 6% of the units and 9% of the installed capacity;
- Mixed warehouses, composed of silos and storehouses at the same time: 14% of units and 35% of the installed capacity.

The regions of Fez-Boulemane and the Grand Casablanca alone represent almost 44% of the total capacity of the country.

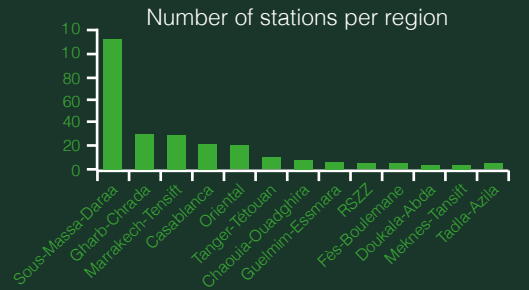
Grain traders hold almost 90% of the capacity; the remainder is held by the cooperatives.

Packing stations:

Morocco has more than 20 packing stations distributed according to their use, as follows



Most of these stations are located in the Souss-Massa-Draa region. Over 75% of them are concentrated in four regions of the country.



Food Industries

The sector of food industry is highly diversified in Morocco. The applicable classification of economic activities contains in this sector the industries related to beverages, fruits and vegetables, meat, fish, milk, fats, flours and groats, cereals, animal feed, tobacco and other food products. At this level, the segmentation below which is based on an integrated vision of the value chain around the 1st and 2nd processing, may be adopted to distinguish six key areas and more than 20 industries:

Meat Industry:

- Butcher's meat production;
- Poultry meat production;
- Industrial preparation of meat products.

Fruit and vegetable industry:

- Processing and preserving of potato;
- fruit and vegetable juice Preparation;
- Transformation and preserving of vegetables;
- Processing and preserving of fruits.

Dairy industry

- Production of liquid milk and fresh products;
- butter manufacturing;
- Cheese making;
- Manufacture of other dairy products;
- Ice Manufacturing..

Industry of Grain and grain products destined for human consumption:

- Milling;
- Production of starch products;
- Industrial Manufacture of bread and fresh pastry;
- Rusks, biscuits and preserved pastry;
- Production of pasta and similar pastes.

Sugar products:

- Chocolate and confectionery.

Other food industries:

- Industry of fats;
- Processing of tea and coffee;
- Manufacture of condiments and seasonings;
- Manufacturing of Food suitable for children and health constraints.

Some branches are characterized In terms of size by a large number of small units, such as flour manufacturing industry (modern pastries), while others are relatively concentrated, such as sugar, oils and seeds. Regarding the marketing, certain branches (fruits and vegetables, fish ...) target the foreign market, while others (fats industry, dairy industry, grain processing, beverages ...) are exclusively oriented towards the domestic market. The branch of fruit and vegetables is dominated by the activity of preservation, followed by juices and tomato-based preparations. Large food companies are either large national groups or foreign companies.

The key figures of the Ministry of Industry, Trade and New Technologies showing the multi-year development of this sector are given in the table below, in billion MAD:

Data / Year	2004	2005	2006	2007	2008	2009	2012
Production	55,4	58,3	60,9	69,7	79,4	83,1	106
Added value	13,1	13,3	13,8	15,3	16,6	18,3	30
Investment	2,6	2,7	2,6	3,5	4,4	4,45	4,5

Moreover, according to the same source, the food industry has over 2000 companies and employs an average of nearly 80 000 people, three-quarters of them are permanent employees. The employment of women in this category represents nearly 36% of the total workforce. However, a study conducted by

MAPM (Ministry of Agriculture and Maritime Fisheries) of the entire value chain revealed nearly 45000 economic units for 200000 jobs.

At the geographical distribution level, the food industry is concentrated in the regions where the planted areas are important, including Souss-Massa-Draa, Doukkala-Abda and Fez-Boulmane, and in the Grand Casablanca, due mainly to the presence of the port.

As for the development strategy, NPIE (the National Pact for Industrial Emergence) had already identified the food industry as a high potential growth sector and has envisioned therefore a profound change in that sector in the long term, through a better valorisation of agricultural resources and a diversified and competitive export supply. This strategy is outlined, according to the vocation of the sectors concerned, as follows:

- Sectors with high export potential: They include in particular the products stemming from the processing of fruit and vegetables, olive and argane products, spices and aromatic and medicinal plants. Their development is achieved through the definition of 'Morocco Offer' to the attention of domestic and foreign investors and its implementation is ensured by the MAPM (ministry of agriculture and maritime fisheries) within the framework of the Green Morocco Plan.
- Sectors of national staple commodities: They give rise to voluntarist sectoral plans for:
 - Increasing the transformation capacities of the existing stakeholders to support the growth of the animal livestock and dairy production;
 - The liberalization of slaughter and the development of modern distribution to support the development of meat sectors;
 - Support for the creation of new large integrated projects.

- Intermediary sectors: The SME competitiveness program of these sectors hinges on the reduction of tariffs on imported inputs and semi-finished products and the modernization of the regulation and standards applied on the products in order to ensure their quality and safety.

- The National Pact for Industrial Emergence gives rise to a set of concrete measures and a clear commitment on the part of the State. Those measures below are related to agribusiness:

- Measure 44: Establishing a 'Morocco Offer' to the attention of domestic and foreign investors in export sectors related to the Green Morocco Plan;

- Measure 45: Implementing the necessary efforts to canvass the leading players in the export sectors and draw on the competences, including those of the sector, to sell Investors Morocco offer;

- Measure 46: Establishing an offer of infrastructures and services in conformity with the highest international standards in the agropoles;

- Measure 47: Deploying a promotion plan on the target categories containing plan of canvassing of targeted contractors, business meetings with their buyers both in Morocco and in the target countries, a program of participation in events and trade shows as well as actions of public relations and communication particularly with specialized media;

- Measure 48: Establishing a meat plan, through two key actions: the liberalization of slaughter and the development of modern distribution of meat and the promotion and support for the implementation of integrated projects.

Complementary measures of support are envisaged. These measures include a program of specific training and the development of six agropoles.

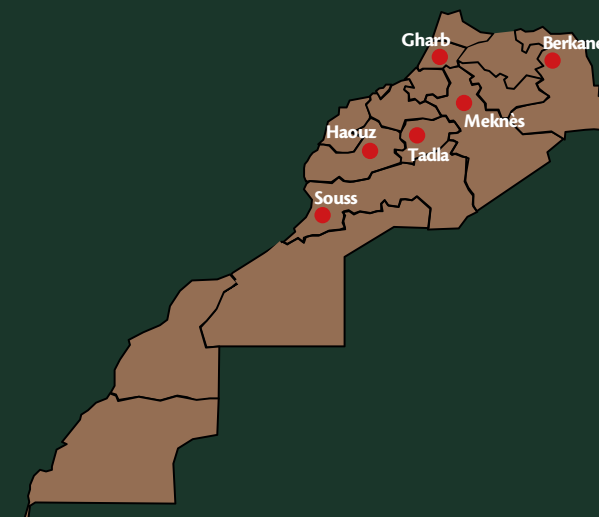


Agropoles:

Within the framework of the implementation of the PMV (Green Morocco Plan) and the National Pact for Industrial Emergence and in order to provide an appropriate framework for the integration of the value chain of food industry, improve the productivity of the sectors and ensure a better valorisation of the agricultural production, a program was adopted for the installation of 6 «agropoles». In its first phase, and as shown in the map below, six agropoles are planned for the period 2009-2015; they are distributed in Meknes, Berkane, Tadla, Agadir, Haouz and Gharb. These agropoles offer an attractive framework for national and international industry, characterized by better access to land at a competitive price, services, means of production and to markets as well as a better pooling of resources. Each agropole presents an offer of complete value and consists of the following elements:

- An area of agro-industrial activities where exist the food production companies;
- An area of logistics and services which includes service companies, business incubators and a technology platform;
- An area dedicated to distribution and trade activities;
- A pole of research-development and food quality control where laboratories falling under the agencies under the supervision of the Ministry of Agriculture and Maritime Fisheries (National Institute of Agricultural Research 'INRA', National Office for Health Security of Food Products 'ONSSA', Autonomous Establishment of Exports Control and Coordination 'EACCE' ...) and common areas are to be built;

- A training center;
- An area of tertiary activities that can accommodate banks, insurance companies, catering and other services.



Map of agropoles' distribution planned for the period 2009-2015

Investment Environment



Within the framework of support for the implementation of the Green Morocco Plan, financial aids are granted by the State to encourage private investment in agriculture. They are implemented through the FDA (Agricultural Development Fund), and are periodically reviewed in order to meet their purpose.

They first proposed the introduction of a new aid in accordance with the commitments made under the performance contracts signed between the State and the interprofession of the major production sectors, as well as the strengthening of the aid allocated to certain sections but also an encouragement and a strong incentive to the aggregation.

In addition, so as to facilitate the process of granting this aid, support measures have been put in place, such as totally adapted and formalized procedures, one stop Shop, with branches where appropriate, with Provincial Directorates of Agriculture (DPA) and the Regional Office of Agricultural Development and a specific application (ORMVA), entitled System of Agricultural Aids and Subsidies (SABA). The latter, available from the web portal Ministry of Agriculture and Maritime Fisheries (MAPM), under the heading 'Online Services', offers a multitude of benefits:

- A speedy and simplified handling of files;
- A collaborative work and information sharing in real time between the different levels of the territory;
- Improvement of the quality of services offered to users;
- A traceability of operations;
- Spontaneous monitoring of files ;
- A check of public funds.

Universal Subsidy Scheme:

This scheme targets, according to the area of intervention, the following purposes:

Water management in agriculture and land improvements:

- Promoting water saving through the adoption of irrigation techniques which help save water;
- Improving productivity and water valorisation;
- Promoting access for small farmers to drip irrigation techniques.

Subsidies in the plant sector:

- Improving agricultural equipment utilization rate per hectare;
- Achievement of the targets of the Green Morocco Plan (PMV) regarding the mechanization;
- Improving access for small farmers to state aid;
- Expansion of crops (date palm, olive, citrus, early vegetables ...)
- Increasing production of fresh and processed fruits and vegetables;
- Improving performance of valorisation units;
- Modernisation of the agro-industrial sector;
- Increase of exports and reconquest of Morocco position on certain historical markets;
- Promoting the valorisation of agricultural and local 'terroir' products

Subsidies in the livestock sector:

- Improving performance of meat and dairy breeds;
- Modernization of red meat, poultry and dairy farms,;
- Improvement of productivity of livestock (milk, meat, honey ...);

- Development of the downstream of the sectors of milk and red meat;
- Valorisation of animal products.

Moreover, the applicant must file, before an investment is made, in duplicate, a pre-approval application file or an application for agreement in principle, with the competent one stop source. The latter then conducts the verification of the presence of all the required documents. If the file is complete, a receipt of the application deposit (numbered and dated) is delivered to the applicant only after verification. Incomplete applications are returned to the applicant with a receipt stating the missing documents.

Complete applications are registered by the one stop Shop and transmitted to the technical service concerned of the DPA (Provincial Directorate of Agriculture) or the ORMVA (Regional Office of Agricultural Development) for review and monitoring of the implementation of the investment on the premises. If the investment is eligible for the subsidy of FDA (Agricultural Development Fund), a certificate of approval is established by the DPA.

The overall time limit for handling the applications are as follows.

- 20 Business Days for projects of Category 1 (drip irrigation or supplemental irrigation, land development, livestock building construction, installation of anti-hail nets ...)
- 12 Business Days for projects of category 2 (citrus and olive trees planting, producing of breeding cattle and sheep, acquisition of breeding goats and camels ...)
- 5 Business Days for the agreement in principle for the acquisition of agricultural equipment and animal farming equipment.

Then the subsidy application files, meeting the required

conditions, must be handed over within the predefined deadlines, ranging depending on the case from 6 months to 30 months. These are then dealt with by the DPA or ORMVA until the releasing of the aid within an overall time limit set at 30 Business Days.

Scheme of specific aid to aggregation projects:

Subsidies from the state to the aggregation projects are of three types:

Grants related to irrigation and agricultural equipment:

These grants may be awarded to both the aggregator and the aggregated for investments related to the production and the surface subject of the aggregation project.

Grants related to valorisation units:

This grant is intended for aggregators and developers of aggregation projects in order to work on a better product valorisation made by the aggregated and aggregators themselves.

Lump sum grants:

These subsidies, aimed at encouraging the aggregation, allow to contribute to the financing of actions undertaken by the aggregators in favour of the aggregated; especially those related to the professional organization, supervision and access to new agricultural technologies. The amount varies from 20 to 5 000 MAD / ha for the plant sectors, and from 28 to 90 MAD / head and from 70 to 7 500 MAD / tonne for animal sectors.

The tables below give, by way of illustration, examples of subsidies granted to agricultural investments:

Aid to water management in agriculture

Operations	Subsidy rate (% of cost) and ceilings		
	Except aggregation and more than 5 ha	Except aggregation and less than 5 ha	Aggregation projects
Drip irrigation projects			
Digging and casing of wells or boreholes			
Supply and installation of water pumping equipment			
Development of water storage ponds for irrigation	80%	10%	10%
Supply and installation of head station equipment	36000 MAD/Ha	45000 MAD/Ha	45000 MAD/Ha
Supply and installation of irrigation water supply and distribution pipes			
Supply and installation of pipes and distributors of irrigation water at the plot			
Water Storage basins	80%	10%	10%
	16000 MAD/Ha	20000 MAD/Ha	20000 MAD/Ha

Aid for farm equipment with agricultural machinery

Machinery	Except aggregation		Aggregation projects	
	Subsidy rate (% of cost)	Ceiling of subsidy (MAD)	Subsidy rate (% of cost)	Ceiling of subsidy (MAD)
Fram tractor		72000		96000
Working equipment and maintenance of tractor-moved soil		17000		22000
Working equipment and maintenance of power harrowed soil	30%	72000	40%	96000
Equipment of spreading organic matters		48000		64000
Equipment of supplying and spreading of mineral matters		19000		26000
Seeding equipment (single or combined), and planting material		48000		67000
Phytosanitary treatment equipment for plants	50%	60000	70%	84000
Phytosanitary treatment equipment for other crops other than plants		28000		39000
Combine harvester	20%	208000	30%	312000
Straddle tractors for olive harvest	30%	480000	40%	640000



Aid for farm equipment with agricultural machinery

Operations		Rate and amount of subsidy
Planting and creating of orchards		
Rosaceae fruit planting		60% of seedlings purchase price 3 500 to 17 000 MAD/Ha
Rosaceae fruit planting		60% of seedlings purchase price 3 500 to 17 000 MAD/Ha
Date palm	Acquisition of seedlings for the densification and rehabilitation of palm groves	10%
	Acquisition vitro seedlings made for the expansion of palm groves	70% of the purchase price with a ceiling of 35 000 MAD/HA
Creating homogeneous olive orchards		from 3 500 to 5 000 MAD/ha
Creation of new citrus plantations		4 000 to 11 000MAD/ha
Promotion and diversification of agricultural exports		
Citrus exports by land and sea		50 MAD / t for all of the quantities exported to Russia 10 MAD / t for quantities exported exceeding the volumes exported during the reference year (1st August 7 to 31, 203) 50 MAD / Tonne for quantities exported excluding Russia, the European Union, excluding Ukraine, excluding China and the Arabian Gulf countries in excess of the volumes exported during the year from September 1, 200 to August 31, 201.
Exportation de la tomate par voies terrestre et maritime		70 MAD / tonne for the quantities exported except the EU exceeding the volumes exported during the year from 1 September 207 to 31 August 208
Exportation de l'huile d'olive par voies terrestre et maritime		2 000 MAD/exported tonne

Aid to animal sectors

Operations	Rate	Amount or ceiling of subsidy
Production of selected breeding of pure breeds of sheep		70 to 80 MAD/head
Acquisition of livestock equipment		
Crusher		6.000
Blender		15.000
Livestock feed unit attached to the farm	30%	60.000
Flail forage harvester		13.500
1 row maize harvester		16.500
2 row maize harvester		300.000
Self propelled maize harvester		42.000
Artificial insemination equipment		2 000 to 6 000 MAD/Unit
System of cooling of livestock buildings		18 000 to 120 000 MAD/Unit
Construction of livestock buildings		
Operations	Rate	Ceiling of subsidy (MAD/housed head
Modern cattle stable		
- covered fettered		20
- A loose housing		50
Traditional stable	25%	75
Goats and sheep farm		
- Modern		80
- Traditional		60



Aid to units of valorisation of aggregation projects

Type of projects	Rate of subsidy	Ceiling of subsidy (in MAD)
Seed aggregation project around a packing station	10%	1 500 00
Aggregation Project around a grain storage unit		3 200 00
Citrus aggregation project around a packing station		4 750 00
Olive aggregation project around a complex including a crushing unit and a bottling plant in rainfed and / or irrigated land		2 100 00
Olive aggregation project around an canning unit		760 000
Project of aggregation of vegetable crops around a packaging unit		2 460 00
Project of aggregation of vegetable crops around a complex including a packaging unit and unit of freezing		1 980 00
Project of aggregation of vegetable crops around a refrigeration unit		2 240 00
Project of aggregation of dates around a packaging station		1 000 00
Project of aggregation of the dairy industry around a valorisation unit		2 400 00
Project of aggregation of red meat around a complex including a bulls fattening centre, a slaughterhouse and cutting room		3 470 00

Table of lump sum subsidies to aggregation projects

Type of agricultural aggregation project	Amount of lump sum subsidy in MAD/Ha or head or tonne
Citrus aggregation project around a unit of packaging and / or processing	1 500 MAD/ha
olive aggregation project around a crushing unit	rainfed : 450 MAD/ha
Irrigated : 1 100 MAD/ha	Bour : 250 DH/ha
	Irrigué : 650 DH/ha
olive aggregation project on a unit of canned olives	Rainfed : 20 MAD /ha
Irrigated : 60 MAD /ha	1 500 DH/ha
Fruit farming aggregation project around a unit of cold storage and / or packaging and / or processing	1 500 MAD /ha
Table wine aggregation project around a packaging unit	1 500 MAD /ha
date palm Aggregation Project around a unit of packaging and / or cold storage and / or processing	3 000 MAD /ha or
3 000 MAD /80 palm	3 500 DH/ha
Project of aggregation of vegetable crops around a cold storage unit	3 500 MAD /ha
Project of aggregation of vegetable crops around a unit of packaging and / or processing	3 500 MAD /ha
Project of aggregation of vegetable crops around a complex including a packaging unit and unit of freezing	3 500 MAD /ha
Aggregation project of winter cereals (durum wheat, soft wheat, barley) around a unit of grain storage and / or processing	Rainfed: 400 MAD /ha
Irrigated: 50 MAD /ha	550 DH/ha
Aggregation project of irrigated spring cereals (rice, maize) around a unit of grain storage and / or processing	Rice : 800 MAD /ha
	Maize : 550 MAD /ha
Project of aggregation of legumes on a storage unit and / or packaging	5 00 MAD /ha
Oilseed crop aggregation project on a crushing unit	1 955 MAD /T
Project of aggregation of sugar crops on a processing unit	550 MAD /ha

Type of agricultural aggregation project	Amount of lump sum subsidy in MAD/Ha or head or tonne
Project of aggregation of cereal seed on a packaging unit	60 MAD /ha
Project of aggregation of organic citrus on a packaging unit	2 000 MAD /ha
Organic olive tree aggregation Project on a crushing unit	950 MAD /ha
Project of aggregation of organic vegetable crops around a packaging unit	4 000 MAD /ha
Project of aggregation of the argan tree around a unit of extraction and / or processing	3 400 MAD /ha
Saffron aggregation project around a unit of packaging and / or cold storage and / or processing	5 000 MAD /ha
Project of aggregation of perfume rose around a unit of processing and / or packaging	5 000 MAD /ha
Project of aggregation of bowine red meat around a centre of fattening and/ or slaughterhouse	350 MAD /head
Project of aggregation of goat or sheep red meat around a centre of fattening and/or slaughterhouse	28 MAD /head
Project of aggregation of camel red meat around a centre of fattening and/ or slaughterhouse	800 MAD /head
Cow milk aggregation project around a dairy processing unit	20 MAD /head
Goat milk aggregation project around a dairy processing unit	50 MAD /head
Aggregation project of camels milk around a dairy processing unit	900 MAD /head
white meat aggregation project on a poultry slaughterhouse	1 000 MAD /tonne
Eggs aggregation project around an egg packaging unit	750 MAD /tonne
A beekeeping aggregation Project around a unit of extraction and packaging of honey (honey house)	7 500 MAD /tonne

However, the exhaustive list of subsidies granted to different investments is detailed in the manual of the Agricultural Development Fund (FDA-April 205), which is available directly on the site MAPM (ministry of agriculture): www.agriculture.gov.ma or the site of ADA: www.ada.gov.ma

Procedure for approval of agricultural aggregation projects

Prior to the completion of an agricultural project aggregation, the aggregator file an application of prior approval of his agricultural aggregation project to the Regional Directorate of Agriculture concerned, accompanied by a file containing the following documents:

- 1) Identification of the aggregator :
 - For natural persons, copy of the Identity card;
 - For legal persons, copies of the articles of association.
- 2) A letter stating the technical and management capabilities of the aggregator ;
- 3) A sheet stating the sector concerned by the agricultural aggregation project, the location of the said project (the intervention areas targeted by the project, the location and the capacity of the valorisation unit subject to project), and the nature of interventions of the aggregator towards the aggregated ;
- 4) The business plan of the agricultural aggregation project ;
- 5) The list of the aggregated to be associated with the agricultural aggregation project with their identification including forename and surname, the number of the National Identity Card, the Province and the Rural Commune where exists the farm of the aggregated subject to the agricultural aggregation project ;

6) A copy of the proposed agricultural aggregation contract signed between the aggregator and the aggregated.

A Technical Committee chaired by the Regional Director of Agriculture or his representative shall review and give its opinion on the approval of the project.

After approval of the agricultural aggregation project, the aggregator shall file with the Regional Directorate of Agriculture interested by the aggregation agricultural project:

- The final list of aggregated;
- A copy of each agricultural aggregation contract established with the aggregated, together with a copy of their Identity card and a document to identify and locate the farm subject to the aggregation contract;
- His written commitment to realize the agricultural aggregation project, as approved, accompanied with the validated project file. These documents must be signed and authenticated by the aggregator.

The Regional Directorate of Agriculture concerned by the agricultural aggregation project shall verify these documents and their conformity. It establishes the list of the approved aggregated whose farms are located within the scope of its jurisdiction and sends the said list to the Agency for Agricultural Development.

Each approved agricultural aggregation project and for which all necessary formalities are completed, the Agency for Agricultural Development establishes agricultural aggregation certificates.

The agricultural aggregation certificates of the aggregators and the aggregated are transmitted to the Regional Directorate of Agriculture concerned for their delivery to the aggregator and the aggregated against an acknowledgement of receipt.

Procedure for granting subsidies related to agricultural aggregation

State Financial Aid is granted to agricultural aggregation projects as:

- 1) A subsidy with preferential rates for investments made regarding the acquisition of agricultural machinery and / or equipment in irrigation water saving systems or supplemental irrigation systems;
- 2) Lump sum subsidy to encourage agricultural aggregation for assistance and technical support from the aggregator towards the aggregated to achieve the goals set in the Agricultural aggregation project concerned.

1. Subsidy with preferential rates for investments

The grant with preferential rates related to irrigation and agricultural machinery is granted to farmers (aggregators or aggregated) on the basis of an application filed with the competent services of the Regional Directorate of Agriculture of the place of the farm concerned, together with the agricultural aggregation certificate. This grant is paid in two tranches:

- The first tranche: calculated on the basis of rates and ceilings set in the context of the universal. This tranche is paid upon obtaining the agricultural aggregation certificate;
- The second tranche: calculated on the basis of rates and ceilings related to the agricultural aggregation projects, diminished from the amount granted in the first tranche. This tranche is paid at the end of the first year of delivery by the aggregated, from

their production to the aggregator, based on a final discharge given to this end by the said aggregator.

2. Lump sum subsidy for the encouragement of the agricultural aggregation

Regarding the lump sum grant, it is paid in three tranches on the basis of lists of the aggregated provided annually by the aggregator and approved by the relevant services, over the first three years of delivery of the production of the agricultural aggregation project in question as follows:

- 1st tranche: 13 at the end of the first year of delivery of production by the aggregated;
- 2nd tranche: 13, at the end of the second year of delivery of production by the aggregated;
- 3rd tranche: 13, at the end of the third year of delivery of production by the aggregated.

To this end, during the first three years of implementation of the project, the aggregator annually provides a lump sum grant of encouragement of the aggregation proportional to the areas of the farms or number of livestock. Applications are not in any case to be deferred to the following year.

The file of application of the lump sum subsidy consists of the following documents:

- lump sum subsidy application
- A copy of the register held mandatorily by the aggregator in conformity with a predefined model. The register must be nominative and retrace in particular the quantity delivered by the aggregated, the awarded prices, delivery dates and proof of payment with a recapitulative situation of the tonnage delivered by the aggregated.

The release of the lump sum subsidy is made at the end of each of the timelines set on the basis of a finding

made by the competent services of the Regional Directorate of Agriculture regarding the following:

- The average yield observed in a representative sample of the aggregated
- The realizations in terms of production collected by the aggregator at the level of the valorisation unit found at the registry level.

the DRA rules, in terms of the abovementioned finding, on the number of the aggregated who delivered their production to the valorisation unit contained in the

register held by the aggregator and delivers to him a certificate of the production collected by the aggregated.

Finally, on the basis of the certificate of the collected production issued to the aggregator, DRA makes a decision to award the relevant tranche of the lump sum grant. This decision, duly signed by the Regional Director of Agriculture or his deputy is sent to the concerned Regional Bank of 'Credit Agricole', which shall release the financial assistance to the recipient





Bank Financing:

The funding commitments of the Green Morocco Plan made by the Moroccan banks under specific agreements signed to this effect involving significant amounts, as shown in the following table:

Bank	Amount provided in MAD billion
Attijariwafa Bank Group	25
Groupe Crédit Agricole du Maroc Group	20
Groupe Banque Populaire Group	20
Crédit du Maroc	33
Société Générale Morocco	3

To do this, financing formulas and solutions have been specifically developed.

These relate in particular to the financing of farms mainly through:

- The financing of inputs;
- Advances on crops;

- The financing of the collection, processing, marketing and / or export of products;
- Agricultural credit savings covering the financing of operating cycles;
- Short-term credits, taking different forms: harvest loans, overdraft facilities, bank overdrafts ...
- The funding of various other operating expenses.
- Investment Funding, including:
- The provision of equipment loans;
- The development of specific formulas for the purchase of agricultural machinery.
- Integrated solutions of financing comprising in addition to traditional financing, services and / or other support mechanisms undertaken also by banks or other stakeholders (government, aggregated ...).

Finally, the currently proposed bank financing products should see a significant evolution, in the medium term, to integrate the changes made.

Alternative financing methods:

The interventions of private investors and other financiers and donors for funding the Green Morocco Plan projects can take several forms:

The mobilization of funds within the framework of venture capital projects or specialized investment funds. The intervention of the latter depends essentially on elements such as:

- The adopted positioning;
- The prearranged procedures;
- The expected IRR;
- The upper and lower ceilings of contribution per project
- The duration of the investment ...
- Leasing;
- Factoring;
- Supplier credits associated with the input financing;

Zone	Guarantee level	eligible area	Kinds of crops
Zone 1 : unfavourable in rainfed	60 MAD/ha	All of the areas	Cereals and legumes
Zone 2 : moderately favourable in rainfed	Level 1 : 1 450 MAD/ha	All of the areas	All kinds of insurable crops
	Level 2 : 2900 MAD/ha	Area Greater than or equal to 10 ha	All kinds of insurable crops
	Level 3 : 4350 MAD/ha	Area Greater than or equal to 20 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower
Zone 3 : Favourable in rainfed and irrigated area	Additional level Level 4 : 600 MAD/ha	Area Greater than or equal to 10 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower
	Additional level Level 5 : 800 MAD/ha	Area Greater than or equal to 10 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower

- Direct funding of the aggregated by aggregators;
- Joint ventures combining multiple stakeholders with a view to an alliance building on their strengths.

Crop insurance :

1. Climate comprehensive for cereal, legume and oilseed crops :

The insurance contract, developed by MAMDA insurance company, is open to farmers whose production involves cereal crops, soft wheat, durum wheat, barley and maize, legumes crops, beans, lentils, peas, chickpeas and haricot and the oilseed crops of rapeseed and sunflower .This insurance covers the following risks: drought, hail, frost, high winds, sandstorms and excess water.

Climate comprehensive insurance products extend to all rural districts of the Kingdom.

Farmers will be able to subscribe to guarantee levels specified below depending on the zone where the insured parcel is located, area and kind of ensured crop:

Produits de Financement et d’Assurance

For the rural districts within zones 1 and 2, a minimum guaranteed compensation amount of 30 MAD / ha in case of disaster has been established in order to cover part of the cost of inputs and reduce the vulnerability of small farmers in difficult weather conditions.

It should be clarified that the irrigated plots and oilseed crops are insurable at levels 1, 2, 3, and additional levels regardless of the areas where they are located.

The irrigated plots are not covered against drought risk

The Insured capital = Amount corresponds to the guarantee level x the insured area

The period of subscription runs from September of each year until 15 December for fall crops (soft wheat, durum wheat, barley, beans, lentils, peas and rapeseed) and February 28 for spring crops (maize, haricot beans, chickpeas and sunflower).

The guarantee period begins from the sowing and at the earliest at dates fixed by type of crop and area and ends at harvest.

In order to do this, the state subsidizes part of the amount of contributions payable by the insured, determined according to the guarantee level of 57%, 68% and 90%.

The amount of contributions due by farmers is, according to the level of subscribed guarantee, as shown in the following table

Levels of guarantee	Subsidy rate to contributions	Contribution paid by the farmers
Unfavourable rainfed zones : 60 MAD/Ha	90%	16 MAD/Ha
Moderately favourable rainfed zones : 90MAD/ Ha	90%	22 MAD/Ha
Favourable rainfed zones and irrigated zones :		
Level 1 : 1 450 MAD/Ha	90%	26 MAD/Ha
Level 2 : 2900 MAD/Ha	68%	199 MAD/Ha
Level 3 : 4350 MAD/Ha	57,3%	398 MAD/Ha

The State contribution is paid from the FDA's own resources through the Natural Calamities Fund, to the account of the insurance company.

2. Fruit growing Climate comprehensive guarantee program

- Insurable Productions: pome rosaceae (apple, pear and quince), stone rosaceae (apricot, plum, peach, nectarine and cherry), Citrus, Olive, Almond, Pomegranate and Fig Tree
- Covered risk: Hail, Frost, The winds, the Chergui, the high temperatures, the excess water.
- Territorial coverage: guarantee program covers the major areas with capability for fruit growing.
- Membership Requirements: The guarantee agreement «Fruit Tree growing climate comprehensive» is marketed by MAMDA insurance company, is open to any farmer whose kind of crop to be guaranteed is part of the list of eligible covered crops.
- The guaranteed plot should be located in one of the provinces covered by the Guarantee Program.



Type of crop	Subscription period
Apple	From January 1 to June 15
Pear	From January 1 to May 31
Quince	From January 1 to May 31
Apricot	From January 1 to April 30
Plum	From January 1 to April 30
Peach and nectarine	From January 1 to April 30
Cherry	From January 1 to May 31
Citrus	From January 1 to June 15
Olive	From January 1 to June 30
Almond	From January 1 to May 31
Pomegranate	From January 1 to May 31
Fig	From January 1 to May 31

- Capital guaranteed (MAD) = Capital guaranteed by Ha (MAD / ha) x guaranteed Area (Ha)
- Capital cannot exceed the ceiling set below by crop type:
- Amount of contributions: Contribution (MAD) = Capital guaranteed (MAD) x Subsidized

Crops	Ceiling of capital guaranteed
Apple and pear	34500
Quince	19500
Stone rosaceae (apricot, plum, peach, nectarine and cherry)	13700
Citrus : small fruits	35000
Citrus : Oranges	28700
Rainfed olive	3400
Irrigated olive (density <25 seedlings/ha)	7600
Olivier Irrigué (density >= 25 seedlings/ha)	11500
Rainfed almond	5700
Irrigated almond (density< 30 seedlings/ha)	8600
Irrigated almond (density >= 30 seedlings/ha)	15000
Pomegranate	15600
Rainfed fig	2100
Irrigated fig	5700

- Amount of contributions: Contribution (MAD) = Capital guaranteed (MAD) x Subsidized contribution rate (%)
- Rate of subsidy to contribution : adjusted in accordance with the guaranteed area:

Crops	Range of Subsidy rate	
	Min.	Max.
Citrus	3.6%	7.5%
Rosaceae	2.7%	7.5%
Almond	2.7%	7.5%
Olive	2.7%	7.5%
Pomegranate	2.7%	7.5%
Fig	2.7%	7.5%

A discount of 15% on the contribution rate will be given to areas equipped with anti hail net and / or a frost-fighting wind machine

3. The major private insurance products

Fire insurance

- Straw and fodder fire

It guarantees the reimbursement of damages caused by fire to straw and fodder, whether they are contained in a building or are put in stooks. It also covers fire damages caused to neighbours and third party.

- Fire of vehicle and agricultural machinery

This insurance covers all of the damage caused by fire to: Tractors, Harvesters; Sugar cane harvesting machines and any self-propelled machine used for agricultural work. It also covers all damages caused to third parties' crops.

- Crop Fire Insurance

It covers the damages caused by fire to the crops in stooks or on the stump

Area	Subsidy from the state (% of the contribution amount)
≤20 ha	70%
20 ha < Greater.≤ 50 ha	60%
Greater than 50 ha	50%

- Hail insurance

It covers the production of the farmer against the quantitative and qualitative losses caused by the mechanical action of the impact of hailstones on crops on the stump.

The hail insurance ensures total value of crops (fruit or grains) of which the contribution is calculated at a rate that is expressed in% depending on the type of crop as well as the district in which the farm is located

• *Livestock mortality insurance*

Insurance of «livestock mortality» is intended to protect farmers against unexpected events that can cause the death of their herd. It compensates them for the death of bovine or equine species after the following events: Accident, servicing, Pregnancy, farrowing, Electrocution and drowning, or Slaughter authorized by MAMDA insurance company either by the health authorities, slaughter by order of a veterinarian, death during an emergency operation made to save the animal, the death of the animal insured during transport (less than 50 Km from the animal farm)...

Agro-industrial comprehensive insurance

This insurance provides a complete formula of guarantees reserved to professionals of agro-industrial and refrigeration units (flourmills, oil mills, storage warehouses...) in order to protect themselves against fire, theft, water damage and civil liability.

Civil liability insurance

This product guarantees to the insured effective protection against the financial consequences of civil liability he may incur, by reason of personal, material and immaterial damages caused to third parties by an accident arising from the action:

- Of their farm staff or other persons under their custody and supervision
- Of their buildings, animals, equipment, and facilities

Farm personal accident insurance

Its purpose is to guarantee the payment of compensation to policyholders in the event of accidental death, personal injury, incapacities or disabilities following accidents in their professional and private lives.



Public-Private Partnership Program

Operation Framework:

The operation of the public-private partnership on the state private domain farmlands aims to the mobilization of national and foreign private capitals for the execution of agricultural projects which allows an optimal valorisation of these lands by contributing to the job creation in rural areas.

Within the framework of this partnership, the Moroccan government provides investors, for a long-term contract, with agricultural lands with reasonable rents. The partner on his/her part undertakes to implement the project subject to his/her offer and to take responsibility for the workers attached to the land

Methods of implementation:

The partnership operation is implemented through calls for tender launched by the ADA (Agency for Agricultural Development) upon the availability of a cleared land.

Any natural or legal person, whether they are Moroccan or foreign ones, presenting satisfactory references with regards to the technical and financial aspects in the field of agriculture and / or in the sectors related to agriculture (agricultural inputs, production, marketing, processing, distribution, etc.) and / or activities related to rural development, can participate in the tender. References in other sectors are also taken into account provided that the tenderer surrounds him/herself with an agricultural expertise.

The successful tenderer shall meet, before the signing of the partnership agreement, the following main suspensive conditions:

- The incorporation of a company under private law in which the successful tenderer must hold at least 34% of shares in the capital of the company signatory of the partnership agreement.

- Production of a topographical plan of the land composing the project assigned, carried out by an authorized topographic firm and validated by the Directorate of State Domains.
- The provision of a bank security to secure payment of the equivalent of an annual rental fee.
- The establishment of a bank security for securing the investments planned at the level of land subject of the project, equivalent to:
 - 5% of the total amount of the investment projected in the offer, for the means and large agricultural projects.
 - 25% of the total amount of the investment projected in the offer for small agricultural projects
- The receipt of payment by the partner of the amount of the first annual rent.
- A bank debit authorization of rent accompanied by a certificate of RIB (bank identifier code).

Duration of the partnership agreement:

Security bond:

The partnership agreement is concluded for a period of:

- 40 years from its effective date for the projects dominated by tree planting and wine-growing, as well as the projects integrating agro-industrial infrastructures;
- 25 years from its effective date for projects on animal husbandry. It shall be specified that in the case of animal farming projects integrating the valorisation units (slaughterhouse, cutting unit ...), the rental period is extended to 40 years; 17 years from its effective date for the projects related to annual crops.

However, Negotiations to extend these lease terms can be started from the 25th year for the lease duration of 40 years, from the 18th year for the lease duration of

25 years and from the 12th year for the lease duration of 17 years.

Rent:

The annual rent is fixed beforehand by the administration for each project prior to the launch of the operation and is increased by 10% every 5 years.

Evaluation of offers:

The selection of tenderers is operated by a technical inter-ministerial committee chaired by the Agency for Agricultural Development (Ministry of Agriculture and Maritime Fisheries) and composed of representatives of the following departments:

- Ministry of Interior;
- Ministry of Economy and Finance;
- Moroccan Agency for Investment Development.

The evaluation of the offers is done according to the following criteria:

	GPA	MPA	PPA
Renderer's references	25	30	45
Technical, economic and financial coherence of the project	20	25	20
Level of investment	15	15	25
Aggregation	20	5	-
Degree of upstream-downstream integration of the project	5	10	-
Employment	15	15	10

Since 2013 a new approach for the implementation of PPP projects has been adopted for boosting private investment. It revolves around the following actions:

- Launching tenders by the Agency for Agricultural Development (ADA) upon the availability of cleared state land
- Adapting the specifications sheet to:
 - Ensure the prior visit of land by the tenderer;
 - Take into consideration the references in sectors other than agriculture provided that the tenderer surrounds him/herself by an agricultural expertise;
 - Follow the directions of the regional agricultural plan for the region hosting the project;
 - Revise upwards the scores assigned to the references of the tenderer and the coherence of the project and reduction of the score assigned to the investment.
- Simplifying the procedure
 - Shortening of time limits;
 - withdrawing the specifications sheet: Freely and directly from the ADA website;
 - Reducing the number of documents required and their specification in the regulation signed by the tenderer;
- Matching supply to small farmers
 - Reduction of the tender bond for smaller projects;
 - Reduction of investment security deposit at 1% of the amount of investment
 - Adapt supply to small farmers
 - Reduction of the bid for small projects guarantee
 - Reduction of the surety to secure investment to 1% of the amount of the investment
- Formalizing a new governance
- Supporting the partners through action plans

Public-Private Partnership Program



Delegated management in the service of irrigation water (PPP in irrigation):

Since its launch in 2008, within the framework of the Green Morocco Plan, the irrigation PPP program has involved the examination of delegated management feasibility:

- existing irrigation perimeters for their modernization and improvement of their management on 600 000 ha;
- New hydro-agricultural development projects, and;
- Projects of backup of irrigation in areas with high potential for agricultural production.

The first achieved PPP project is that of citrus perimeter of Sebt El Guerdane in the Souss Massa region. The project, since its inauguration in 2009 by His Majesty the King, is subject to the monitoring of farm performance and demonstrates satisfactory results of PPP in irrigation with a better efficiency of the irrigation water service management (97 % as network yield and 90% as collection performance).

The second achieved PPP project involves co-financing, conception, construction and operation of irrigation infrastructure in the coastal area between Azemmour and Bir Jdid over 320 ha. The delegation agreement was signed in 2003 and the works of construction of irrigation infrastructures will begin in the second half of 2005 after the completion of the sales campaign.

Other projects will emerge, in the short term, within the framework of the PPP in irrigation especially for operating the perimeter of Dar Khrofa (21 000 ha), the extension and modernization of lot 1 of Gharb on 42 800 ha and irrigation of the plain of Sais on 30 000 ha.

Sea water desalination projects:

Another program on the desalination of sea water for irrigation, is also introduced. This has a particular importance given its direct contribution to the achievement of the Green Morocco Plan's objectives, through support to the development of agricultural production with high added value, as well as limiting environmental impacts generated by the over-exploitation of groundwater resources (continued decline in the water table in some areas, increased water stress ...).

As an illustration, MAPM (Ministry of Agriculture and Maritime Fisheries) launched in February 2005 Call for Expression of Interest for the selection of the private partner to devise, build and operate, and co-finance, for a period of 30 years, the desalination and irrigation infrastructure over 13 600 ha in the plain of Chtouka (Region of Souss Massa Draa).

A second project of PPP in irrigation by desalination has been identified in the region of Oued Ed-Dahab Lagouira on an area of 200 ha. The structuring of the project study will be launched once the real estate base will be identified by MAPM.



Factors and means of agricultural production

Leasing of agricultural land:

1-Procedures of Lease of agricultural land from private owners:

Any investor, whether s/he be a natural or legal person and Moroccan or foreign, can conclude leases of agricultural land from private owners for any duration that suits him/her, except in the case of land located within the demarcated irrigation perimeters. Within the said perimeters, leases are in fact governed by the provisions of Articles 32 to 34 of Dahir No. 1- 6925 forming the Agricultural Investment Code.

The investor can then rent a farm property from a private owner for the duration s/he wishes, except in irrigation perimeters where the duration cannot be less than one rotation cycle of crops. The leasehold is also possible.

Prior to signing any lease which shall be in writing, it is required to be aware of the legal situation of the property and check if it is not burdened with charges. In addition, it is advisable to establish authentic contracts with notaries or Adouls (Muslim notaries), legalize signatures, register them with stamp and registration services and record them with the National Agency of Land Conservation, Land Registry and Mapping for the registered properties or in the process to be registered. On this basis, the guarantees for peaceful and undisturbed possession of the leased properties may be offered.

Property acquisition for the execution of agricultural projects:

Under Dahir No. 173-65 of April 23, 195, regarding the acquisition of agricultural lands or those with agricultural capabilities located outside of urban areas, foreign natural and legal persons and companies limited by

shares cannot acquire agricultural property.

Optimization of technical choices:

National Institute of Agronomic Research (INRA) provides, through its publications and various IT solutions it develops, a rich knowledge base that can be exploited to optimize technical choices to be made by the investor. The aspects developed, hereinafter, constitute a non-exhaustive illustration. For further details, it is appropriate to refer to the official website of the INRA at: www.inra.org.ma

Conditions and periods of growth:

A period of growth is defined as any period where the climate favours simultaneously two conditions: the first relates to the fact that the amount of water available to plants exceeds half of the value of evapotranspiration. The second is inherent in the average daily air temperature which should be above 5 ° C. Thus, the duration of the growth period determines the species and varieties suitable for cultivation in a defined region.

In this regard, the Moroccan climate is characterized by a single period of growth that is variable and its length changes depending on the capacity of soil to store water for plants and regions. During drought years, it reached a fraction of the observed duration during the normal years. Moreover, for Moroccan soil, the available water capacity ranges from less than 20 mm for the thin soils and 10 mm for very deep soils.

For this, maps of agricultural capability of land are available from INRA. They cover 6000000 hectares, for the main crops in Morocco.

In addition, an agro-climatic atlas is also available with INRA.

In advantaged areas of Morocco, especially Tangier, Tetouan, Rif, Pre-Rif, Meknes region, Middle Atlas, Taza,

Atlantic coast in the north of Rabat, the soils have a an available water capacity of 10 mm in an average year. Hence, the growth period exceeds 10 days and reaches up to 20 days in some areas of the Rif.

Cereal potential yield:

The maps of potential yield of wheat, barley and triticale were based on the yields obtained in tests conducted to establish the national catalogue of varieties of cereals. The yield levels achieved in tests without irrigation are considered as the potential ones. These yields vary greatly depending on the period of growth and the recorded precipitation.

For example, the comparison between the different cereal species shows that wheat yields are higher than barley yields in high cereal potential areas and in parts of semi-arid areas. Barley is, on the other hand, more efficient in dry and mountainous areas.

Technological choices:

Genetic advances and new varieties developed by INRA seek a significant increase in productivity and resistance to adverse weather conditions.

Appropriate technological packages are then offered for sectors specified below in order to achieve the above objectives. These also result in investment opportunities which take into account an improved agri-food valorisation:

- Grain sector: the establishment of a range of one hundred and sixteen productive varieties adapted to different agro-ecological zones and resistant to major diseases and pests. For example, genetic progress for durum wheat has helped achieve an annual average gain of 28%.
- Oilseed sector: creation of four sunflower varieties adapted to agro-ecological conditions of production areas and two varieties of COLZA with low erucic acid rapeseed.

- Citrus sector: five new clones of orange, juicy, with a grade suitable for export and lengthened production cycle are being registered in the national catalogue. The introduction of new tristeza-tolerant rootstocks should increase the adaptation to soil and climate conditions in Morocco.

- Date palm sector: a first variety which is resistant to Bayoud and has a high commercial quality, has been created.

- Olive sector: The targeted genetic improvement is to increase the productivity of the sector. Interesting varieties Haouzia and Ménara have been developed and others are in progress. An integrated approach of technical management of crops has been put in place to fight against the enemies of the olive tree and meets the requirements related to the respect for the environment. Finally, quality control has been established for certification of olive oil.

- Sector of a fruit tree: a range of varieties of the main high performance fruit species and rootstocks adapted to different agro-ecosystems has been established. The techniques developed allow the improvement of the fruiting of different fruit species. The nectar of figs and apricots are among the products valorising this sector.

- Sector of cactus: it is an alternative crop for the development of marginal lands. There are two hundred accessions of different origins with a great genetic variability exploited in a program of selection for the products reserved for human and animal consumption. Prickly pear-based products are among the finished products of this industry sector. In addition, new technologies have been developed to facilitate the sustained involvement of small and medium enterprises.

- Sector of animal production: five main breeds of sheep have been compared under similar animal farming conditions. Databases related to zootechnical performance and carcass characteristics have been prepared and have proved significant productivity gains in the cross.
- Sixty date sheets, covering the main crops grown in Morocco, are published and available at the INRA.

Soil fertilization :

Maps of cultivated soil fertility are being generalized over the national territory as part of a project involving MAPM, INRA, OCP Group, IAV and National school of agriculture (ENA). Based on an architecture combining a Geographic Information System (GIS) with a decision-making tool, the drawn up dynamic maps provide, with free access to the public, both useful information and advice related to crop fertilization.

In terms of information, the provided data relate to, among others, the following aspects:

- administrative elements related to the prefecture or the province concerned and the commune (administrative district) of incorporation of the designated place;
- The main crops in the region concerned;
- Data on natural water resources (watershed possible existence of groundwater ...), the nearest dam, where applicable, the climate (temperature, precipitation...) and on soil fertility.

In agricultural consulting, recommendations are lavished in terms of soil fertilization need and this in the light of the chosen crop and the expected yield.

For further details, it is appropriate to refer to the following website: www.fertimap.ma

Commitment of direct production costs:

The direct production costs concern mainly the inputs, workforce, energy, and if that is the case, water for irrigation. The following elements provide the indications for pre-evaluation of certain costs.

Salaries and social security charges :

Minimum wages guaranteed in Morocco in the agricultural sector (SMAG: guaranteed minimum agricultural wage) and the industrial sector (SMIG: guaranteed minimum interprofessional wage) and social security charges associated with it are as follows :

Wage costs :		Agricultural sector	Industrial sector
Guaranteed minimum wage		60,63 MAD/ J (SMAG)	11,70 MAD / H (SMIG)
Seniority incentive	2 years	5%	5%
	5 years	10%	10%
	12 years	15%	15%
	20 years	20%	20%
	25 years	25%	25%
Social security (CNSS : National social security fund)	Employee's contribution	4,29%	4,29%
	Employer's contribution	8,60%	16,60%



The SMAG and the SMIG are applied mainly to workers with no special qualification. For other competences, wages are negotiable and depend largely on the required profiles.

Use of electricity costs:

A green tariff scale is applied to operators engaged in farming activity recognized by a certificate issued by the competent services of MAPM (ministry of agriculture and maritime fisheries)). The tariffs so applied, VAT included, are shown, for information only, as follows:

Tariff options	Fixed premium kW/Year in MAD	Price by kWh in MAD			
		Peak hours		Normal hours	
		Winter	Summer	Winter	Summer
Very long use	2116,13	0,5955	0,5594	0,4964	0,4770
Average use	952,26	1,1737	0,6692	0,8494	0,5384
Short use	423,23	1,7518	0,7787	1,1674	0,5957

For further details, it is appropriate to contact the local commercial department of the National Electricity Office or get further details on their official website at: www.one.org.ma

Cost of using the irrigation water :

The pricing of irrigation water in Morocco is governed by the provisions of the Code of agricultural investments. The tariffs applied in Large Hydraulics perimeters are as follows:

Perimeter	ORMVA / Zone tarifaire	Tarif (MAD / m3)
Gharb	Beht without lift	0,32
	Beht with lift	0,38
	Gravitational Plaine Gharb	0,38
	Gharb Plain sprinkle	0,6
Souss-Massa	Massa	0,77
	Souss Upstream	0,74
	Issen Modern	0,7
	Issen traditional	0,25
Doukkala	Gravitational sectors without lift	0,27
	Gravitational sectors with lift	0,36
	Bouaouane	0,54
	Zemamra	0,52
	T.Gharbia et Ext Faregh et S.Smail	0,51
	High Service	0,44
Loukkos	Rmel Drader	0,69
	Plain and Basses Collines	0,62
	Gravitational sectors Plain RD	0,39
	Merja	0,47
Moulouya	Sectors without lift (Triffa BS)	0,35
	Sectors with lift (Triffa HS)	0,65
	Perimeter of Garet	0,67
Tadla	Tadla	0,28
Haouz	Haouz Central	0,35
	Tessaout upstream	0,31
	Tessaout downstream	0,3
Tafilalet	Tafilalet	0,24
Ouarzazate	Ouarzazate	0,24
Oued Mellah	Oued mellah	0,28

Source: DIAEA (Directorate of Irrigation and Agricultural space development)/ MAPM

Oil and Gas Products:

The prices applied in Morocco for petroleum products, including the diesel fuel, are determined by the state, on the basis of international quotation, but with the intervention of the compensation fund for their regulation.

For gas products and with the exception of butane for household consumption, whose sales price of cylinders of different weights are determined by the state. The prices applied in Morocco are liberalized but are indexed to international quotations since the country imports the majority of its needs in this field.

transport infrastructure and Associated logistics costs:

Road and motorway transport:

The road network under the responsability of the State includes, in addition to conceded motorways, networks of national, regional and provincial roads.

The Ministry of Equipment and Transport (MET), as manager of the aforementioned network, ensures its construction and maintenance. The said network is composed, according to the major categories, of the following:

Length in km	National roads	Regional roads	Provincial roads	Total lenght
Paved	9 806	8 855	16 365	35 026
Non-paved	1 445	1 224	19 292	21 961
Total	11 251	10 078	35 657	56 086

This distribution shows that about 62% of the network is made up of paved roads. In addition, over the last two decades, it has witnessed a considerable increase so as to improve the service of the population. the rate related thereon has gone up from 36% in early 1990 to over 68% in early 2012. For more information, especially with regards to the road maps of Morocco

and the distances between the main cities of the Kingdom, it is appropriate to refer to the institutional website MET: <http://www.mtpnet.gov.ma>

In a different context, the execution and management of the Moroccan motorway network fall under the jurisdiction of the national company of Morocco's highways (ADM). The motorway network is quite developed in the country. It covers 1417 km connecting the major cities of the country (Rabat - Tangier, Rabat - Fez, Rabat - Casablanca - Marrakech Agadir and Fes Oujda). In addition, national and regional development ambitions and the importance of ensuring the smooth transportation of goods and people led to the acceleration of the pace of implementation of the highway program in order to reach 1800 km by the year 2015.

This presentation of the network being made, it is important to note that road transport ensures over 70% of freight traffic, excluding phosphates transported exclusively by railway (before the running of the pipeline being currently under execution), and 95% of passenger traffic. The road traffic recorded, in 2011, a growth of +10% to reach a national index number of traffic of 66 million vehicles x km /d.

Finally, concerning the base price per kilometric tonne for the transport of goods, it is around 0,40 MAD / t / km. This rate may be subject to change depending on the distances and the condition of roads to take.

Rail transport:

The railway network of Morocco has more than 2109 km of railway lines including 1.509 km with single track and 600 km with double track. This network also includes 864 km of service track and 110 km of special branch lines connecting various companies to the national rail network. In addition to transporting

passengers (29.6 million passengers in 2010), the National Office of Railways (ONCF) provides mainly the transport of phosphates, minerals, chemicals and fertilizers. In 2010, freight traffic was around 25,125t.

ONCF runs, since 2005, a major investment program for the upgrade of train traffic plan and putting on an extra train on some railway lines.

The scales for the transport of goods at low speed with full wagon load vary from 0.269MAD /t to 0.404 MAD/ t. These prices are to be increased by a fixed fee and VAT.

The fixed fee provided for in the general conditions of application of general tariffs High Speed (HS) and low-speed (LS), is set, barring subsequent modification, respectively at 12,75 MAD / t for complete wagon load shipments and 25,125 MAD / t for retail shipments.

Furthermore, Morocco has embarked on an ambitious high-speed train development program which will connect the city of Tangier to Marrakech. This project, initiated in 2009, involves the construction of a network of 1 500 km.

Initially, two high-speed lines are to be started in 2015. The first, in the north, will link Tangier to Casablanca in 2013 and the second, in the south, will link Marrakech to Casablanca by the year 2015

Air transport:

The airport infrastructure in the country has 27 airports. Over the period 2007-2012, a program, of nearly 10 MAD billion, for its development and modernization continues. It aims to increase the capacity of the national traffic system and expansion of the major airports in the country. It is the National Office of Airports (ONDA), as a public manager of the national airport infrastructure and air navigation services, which is responsible for executing the said program.

The air cargo tariff is set from Casablanca according to the nature, weight and destination of the goods. In addition, the exporter defrays the expenses of ancillary services (responsibility and registration expenses), whose scales are, for information only, as follows:

- 0 - 45 kg : 100 MAD/kg ;
- 46 - 100 kg : 125 MAD/kg ;
- 101 - 250 kg : 150 MAD/kg ;
- 251 - 500 kg : 185 MAD/kg ;
- 501 - 1000 kg : 240 MAD/kg ;
- 1001 - 2500 kg : 340 MAD/kg ;
- + 2500 kg : 0,20 MAD/kg.

Sea transport:

With a coastline of about 3500 km, Morocco has acquired over the years an important and diverse port infrastructure with currently more than 30 ports, of which nearly half are for polyvalent use. Therefore, the port of Tangier-Mediterranean (Tangier-Med I), completed in 2011, is one of the largest ports in the Mediterranean. It makes Morocco a crossroads of Europe, Asia and America. A second container port Tangier-Med II, which is currently under construction, aims to strengthen the capacity of Tangier-Med I. Both ports have a total capacity of more than eight million containers.

Knowing that prices are fully liberalized, the cost of shipping from Casablanca to the European Union is around

MAD 1,2 thousand and to the United States of America and Canada MAD 1,5 thousand / t.

Other data on transport infrastructure in Morocco are available on the official website of the MET: www.mtpnet.gov.ma/



INSTITUTIONAL, NORMATIVE AND LEGAL FRAMEWORK





Legal Framework Specific to the Agricultural Sector

CODE OF AGRICULTURAL INVESTMENT:

The investment in the agricultural sector is specifically governed by Dahir No. 1 69-25 of 10 Jumada I 139 (25 July 199) as subsequently amended and completed, which forms the Agricultural Investment Code. This code defines the benefits that farmers can receive from the State in the form of technical and financial assistance and the obligations which are thereby incumbent upon them.

In terms of common provisions, the government support could lead to:

- Bonuses and subsidies;
- Long-, medium- and short-term loans depending on the nature of operations;
- The technical and material aid of public services and particularly those of the government authority in charge of agriculture.

The specific provisions stipulated by the aforementioned Code relate in particular to:

- The development of agricultural land in the irrigation areas, according to operating standards that take into account the capability of soils and economic imperatives, and this with reference to the crop rotation plan, cultivation technique, regulation of irrigation methods and discipline in the use of water as well as the introduction of adequate animal speculation in order to enhance crop production and maintain soil fertility;
- The possibility of the execution by the state of external and internal drainage works and the operation and maintenance of primary, secondary and tertiary networks for the kingdom's dry arable regions where agricultural properties are threatened by water flood, rising of groundwater level or

excess surface water;

- The obligation of exploitation of agricultural lands located outside of irrigation perimeters and dry drainage areas;
- The system of control of obligations imposed on the farmers, by mobilizing properly constituted commissions, as well as the penalties which may be applicable on them in case of deviation from the pre-established provisions.

TAX PROVISIONS SPECIFIC TO AGRICULTURE:

Agriculture has enjoyed huge tax exemptions extended until the end of 203. The tax exemption of the sector is expected to promote, attract and develop private investment in this sector. The General Tax Code has instituted new tax provisions and benefits for the agricultural sector:

- Permanent Exemption for small farmers who achieve a turnover of less than 5 million MAD.
- graduated Exemption of income tax and company tax between 204 and 200:
 - From January 1, 204 to December 31, 205, farmers who achieve a turnover of less than 35 million MAD;
 - from 1 January 206 until 31 December 207, farmers who achieve a turnover of less than 20 million MAD;
 - 1 January 208 until 31 December 209, farmers who achieve a turnover of less than 10 million MAD.
- Taxation at reduced rate of 20% for income tax and 17.5% for corporate tax for the first 5 consecutive years from the first year of taxation for large taxable farms.
- VAT exemption with deductibility of the equipment

designed exclusively for agricultural use: Fertilizers, pesticides, agricultural equipment, irrigation equipment ...

- Taxation of VAT at a reduced rate from 7% to 10% or 14% for certain specific products.
- Exemption from VAT on imports of goods and farm equipment, live animals of pure breed, fertilizers, plant material...
- Exonération de la TVA avec droit à déduction du matériel destiné à usage exclusivement agricole : Engrais, produits phytosanitaires, matériels agricoles, matériels d'irrigation...
- Imposition de la TVA à taux réduit de 7% de 10 % ou de 14% pour certains produits spécifiques
- Exonération de la TVA à l'importation de produits et matériel agricole, animaux vivants de race purs, engrais, matériel végétal ...

HEALTH CONTROL OF LIVE ANIMALS, ANIMAL PRODUCTS AND PRODUCTS OF ANIMAL ORIGIN AND ANIMAL FEED:

Procedure of control of animal products and animal feed:

Control of animal products, animal by-products and animal feed is made by the veterinary services falling under the ONSSA (National Agency for sanitary safety of food products) in accordance with the laws and regulations in force particularly:

- The aforementioned Law 2807 on the health safety of food and its implementing texts;
- The Dahir of 24 Shawwal 137 (8 October 197) relating to the health and quality control of animal products and products of animal origin and the texts for its application;

- The law No. 1383 promulgated by Dahir No. 1 83-108 1405 9moharram (5 October 194) regarding the prevention of Fraud on goods and texts for its application;

The action of the veterinary services falling under the authority of ONSSA results particularly in:

- The prior authorization and / or licence by the ONSSA of the facilities of handling, treatment, processing, packaging, storage and distribution as well as the food transport equipments.
- Health control of the conditions in which primary products, food products and animal feed are handled, treated, processed, packed, packaged, transported, stored, distributed, displayed for sale and those reserved for export.
- Collection of samples of animal products or products of animal origin, and animal feed within the framework of the control and monitoring plans laid out by ONSSA in the different animal sectors and this at the level of production facilities, import and sales outlets.
- Direct reports when it comes to foodstuffs health control operations, including conformity control of their labelling and their presentation in the sales outlets and this in accordance with the regulation in force;
- Coercive actions are taken by the veterinary services materialized by the seizure and suspension from sale, when it comes to damaged, fraudulent and toxic goods, or whose quality is questionable and this in accordance with the regulation in force.

Prior authorization or licence of institutions:

The authorization or licence in terms of the health of establishments and food businesses and animal feed is delivered prior to the marketing of these products.

The application for authorization or licence in terms of health, should be sent to the local veterinary service of the location of the unit.

Licence for quarantine stations for the quarantine of animals (cattle, sheep, goats, horses):

The health licence for quarantine stations for the quarantine of certain animal species (cattle, sheep, goats) for import or export (horses) is issued by the Veterinary Services falling under the National Agency for sanitary safety of food products (ONSSA).

The constitution of the application for licence and deadlines to be complied with are specified in the codes of procedures in force, available on the website of the ONSSA at the heading Import / Export www.onssa.gov.ma

Veterinary-sanitary controls on import and export:

The import of live animals and products of animal propagation, animal products and products of animal origin including fishery products and animal by-products and animal feed, is subject to the law and regulation in force, particularly:

- The law 2489 promulgated by Dahir No. 189-20 of 22 Rabia I 144 (10 September 193) enacting veterinary health measures on imports of animals, animal products, products of animal origin, animal propagation products and seafood and freshwater, and Decree No. 289-57 of 25 rabia II 144 (12 October 193) issued for the application of the above mentioned Law No. 24 - 89.

- The above law 2807 of 11 February 200 regarding the safety of food and Decree No. 210-43 of Shawwal 142 (6 September 201) issued for the application of certain provisions of Law No. 28 - 07- on the health safety of food products.

This control is performed at the border inspection posts, whose list is fixed by joint ordinance of the Minister of Agriculture and Agricultural Development and the Minister of Finance and Foreign Investment No. 172696.

The practical procedures for the importation of the abovementioned animals and products are specified at the website of ONSSA under the heading import / export www.onssa.gov.ma.

It should be noted that there is at the level of the said heading, specific procedure codes and are available to operators for the importation of live animals and animal proration products from the authorized countries according to the species.

This control is conducted at the level of the Directorates of Control and Quality (DCQ) and Border Inspection posts (BIP) falling under the jurisdiction of the Regional Directorates of ONSSA in accordance with the regulation in force.

For any application for import or export control, the operator or his representative should contact the veterinary service concerned of the ONSSA (DCQ or BIP) for dealing with his file.

The animal health controls on imports comprises three successive stages:

i) A documentary check:

It is a systematic step which is represented in the verification of the content and form of import files (health certificates or documents, other documents accompanying the goods imported in Morocco).

iii) An identity check:

This is to check the consistency between the elements identifying the batch of imported animals or products, and the accompanying health documents.

iii) Physical and Analytical check:

Physical control is intended to check the health of animals and product safety and their compliance with the regulatory health requirements (for example: Labelling for products and clinical status for animals). This control is carried out on a sample representative of each batch of imported animals and products in order to perform the necessary checks in accordance with procedures and regulation in force.

The use of analytical investigations according to the approach of health risk analysis is related to the nature of the imported goods. To this end, the controller carries out sampling for analytical investigations to verify the conformity of the goods with health requirements in force.

Authorisation of poultry units:

Authorization of poultry units is governed by:

- Law No. 4999 relating to the health protection of poultry farms, the control of the production and marketing of poultry products, promulgated by Dahir No. 102-1191 rabii It 143 (13 June 202) and Decree No. 04684 2 of 27 December 204.
- The ordinance of the Minister of Agriculture, Rural Development and Maritime Fisheries No. 212405 of 15 December 205 setting the documents composing the license application for the exercise of poultry farming activities, brooding of eggs, transport and distribution of live poultry as well as for the creation of egg processing or packing

centres or, poultry slaughterhouses, plants of cutting, processing, packaging, meat freezing and marketing of these meats and table eggs.

- The ordinance of the Minister for Agriculture, Rural Development and Maritime Fisheries No. 212505 of 15 December 205 laying down the health requirements to be met by the marketed day-old chicks.
- The order of the Minister of Agriculture, Rural Development and Maritime Fisheries No. 212605 of 15 December 205 laying down the form and content of the register of health monitoring of poultry farms and hatcheries.
- The order of the Minister of Agriculture, Rural Development and Maritime Fisheries No. 212705 of 15 December 205 laying down common and specific health and hygiene requirements to be met by premises, equipment and operation of poultry farms and / or hatcheries.
- The order of the Minister of Agriculture, Rural Development and Maritime Fisheries No. 212905 of 15 December 205 laying down the minimum distances to be respected between a poultry farm and another, or between a poultry farm and hatchery or between two hatcheries.

The procedures for granting the authorization for the exercise of the activities of poultry farming, hatching eggs and poultry transport means are available on the website of the ONSSA (heading animal health) and available at the level of the provincial veterinary services of ONSSA.



CONFORMITY AND HEALTH CONTROLS OF PLANT PRODUCTS AND PRODUCTS OF PLANT ORIGIN:

Conformity and health control of plant products and products of plant origin is governed by the following laws and regulations including:

The law 2807 regarding the health safety of food and its implementing texts;

The law 1383 promulgated by Dahir No. 183-108 1405 9moharram (5 October 194) on the prevention of goods fraud and the texts for its application;

The law 1788 related to the period of validity of food products and its implementing texts in application of such texts, the action of control services of plant products and products of plant origin lead to:

1. The licence and authorization in terms of health institutions and companies:

- The licences and authorizations at health level are issued by ONSSA to the institutions and companies of treatment, processing, packing, packaging, distribution, storage or conservations of plant products and products of plant origin
- The application for authorization or licence at the level of health is sent to the local Control Service of Plant Products and Products of Plant Origin of the location of the food establishment or company.
- The application form, the constitutive documents of the application file and the deadlines are specified in the existing procedures code related to the granting of health licences and authorizations to the food institutions and companies, are available on the website of ONSSA.

2. Health control of the conditions in which primary products, food products are handled, treated, processed, packed, packaged, transported, stored, distributed, displayed for sale:

- These controls consist of checking the compliance with health conditions, risk control and product traceability at the level of food companies and institutions. These controls are organized within the framework of the control plan based on risk analysis.

Control of regulatory conformity of products:

This control consists of:

- Control of plant products and products of plant origin, food additives on the local market, during import and export:
- Conformity control of agricultural inputs (fertilizers, seeds and pesticides) in the domestic market during import;
- The conformity control of irrigation water at the farm level

These controls consist in:

- Collection of samples and their analysis in official laboratories;
- Direct finding and ascertainment when it comes to the operations of checking of the labelling, presentation and quantity of products;
- Conservatory measures embodied by the seizure and suspension from selling when there are damaged, fraudulent and toxic products, or products whose quality is questionable;

These checks are performed in execution of (permanent, strengthened, cyclical or otherwise) control programs, and control plans and surveillance plans.

Health and conformity control of food products of plant origin during export:

This control involves the issuance, at the request of the exporter, of a health certificate certifying the quality and health safety of products destined for export.

The exporter shall file an application with the local control department of plant products and products of plant origin of the location of the production facility.

This application for control is accompanied by documents required by the health certification procedure for export of plant products and products of plant origin. This control involves three steps:

1. The documentary check: consists in checking the conformity of the documents presented.
2. Identity and physical control that involves:

- Identifying the batch or batches of products to be exported and checking if they match the documents presented;
- physically inspecting the batch or batches of the products and their packaging;
- Checking the conformity of the products to be exported with the requirements of the regulation in force of the destination country.

3. Analytical control:

In this context, the sampling is carried out in the presence of the exporter or his representative.

This control is to verify the conformity of the results of analyses of the batches of products to be exported with the requirements of national regulation and that of the country of destination. This control takes account of the risks inherent to the product.

Health and conformity control during import:

Sanitary and conformity control during import is performed by the service of ONSSA falling under the Directorates of Control and Quality (DCQ) and Border Inspection Posts (BIP) falling under the

jurisdiction of the Regional Directorates of ONSSA in accordance with the laws and regulations in force.

For import control application, the operator or his representative must show up at the concerned local service of ONSSA (DCQ or BIP) for dealing with his file.

Sanitary and conformity control during import includes three successive phases.

1. Documentary control:

It is a systematic control which involves the checking of the content and form of import files (health certificates or documents and any other documents accompanying the goods imported in Morocco).

2. A physical and identity control:

Ce contrôle consiste en :

This control consists in:

- Identifying the goods and checking if they correspond to the documents submitted;
- physically inspecting the goods and their packaging;
- Verifying the conformity of the labelling and presentation.

3. An analytical control:

This control is carried out on a sample representative of each batch of imported goods in order to perform the necessary checks in accordance with the regulation in force.

The use of analytical investigations according to the approach of health risk analysis is related to the nature of the imported goods.

To this end, the inspector shall take samples for analytical investigations to verify the conformity of the goods with health requirements in force.

The sampling is carried out in the presence of the importer or his representative and if necessary a customs agent.

PHYTOSANITARY CONTROL OF PLANTS AND PLANT PRODUCTS IN BORDERS AND WITHIN THE COUNTRY

Phytosanitary control aims to prevent the introduction in the national territory of new potentially dangerous quarantine pests and limit their spread from one area to another, through the verification, at the level of the border posts, of the plant health of imported plants and plant products, and through health surveillance of the crops within the country and the preservation of the quality of the export goods.

The regulations governing the actions of control of these products can be found at the website of the ONSSA, on the link:

http://www.onssa.gov.ma/fr/index.php?option=com_content&view=article&id=115&Itemid=97

Phytosanitary control procedure during the import:

Upon each import declaration, the operator or his representative must file at the service of the protection of plants against a receipt, an application for phytosanitary inspection accompanied by the following:

- original phytosanitary certificate issued by the competent authorities of the country of origin or provenance;
- True certified copy of the invoice by the importer;
- Copy of seed import Authorization;
- Technical Import Authorization (TIA) for wine and Rosaceae plants;
- Certificate I.S.T.A. or Seed analysis Certificate;
- Copy of Customs Declaration (SGD)
- Packing list;

- Copy of the bill of lading or Air waybill;
- Certificate of non-GMO for seed varieties not listed in the official catalogue of Morocco
- Any other document required by regulation.

The phytosanitary control conducted during the import consists in:

- Documentary control;
- Identity control;
- Physical control;
- Laboratory analysis for some plant species (e.g. potato seeds, wheat, ornamental plants ...).

Given the results of the control, the Service of Plant Protection concerned, issues a Import phytosanitary inspection certificate indicating the decision of the control results.

Phytosanitary control procedure during export:

The exporter is invited to submit to the nearest plant protection service, before exporting his goods, an application for export phytosanitary certificate.

This application endorsed with a stamp of MAD 20, must contain all the information that may assist the inspector in the implementation of the control for the issuance of the phytosanitary certificates, namely:

- Name and address of the sender;
- Country of destination;
- Means of transport;
- Name and address of packing station;
- Goods (Description, Quantity, Type and number of packages, Origin, ...);
- Treatment conducted if there is any;
- Date set for export.

Other documents (e.g. import permit, certificate of processing, document helping in the traceability of goods ...).

The inspection can take place either in the fields of production or at the packaging stations, or at the place of storage or at border posts.

This control allows checking the phytosanitary condition of the goods to be exported (lack of quarantine pests in destination countries and also other dangerous enemies) through document verification, identification and physical inspection of the goods, in accordance with the phytosanitary regulation of the importing country. Laboratory analyses and treatments can be conducted when so required.

At the end of this control, if the goods are found to comply with the phytosanitary requirements of the importing country, the Service of Plant Protection concerned, issues a phytosanitary certificate consistent with the International Plant Protection Convention.

Phytosanitary control of plant nurseries:

Nursery control is performed in three steps:

- A first control is carried out following a production declaration submitted by the nurserymen to the Regional Plant Protection Service concerned, to check the species and quantities reported. After this control, a control card is issued to the nurseryman;
- The second control is conducted on the whole vegetation to check the phytosanitary status of plants (absence or presence of diseases and / or pests);
- The third control, carried out during the uprooting of plants, aims to check the works achieved by the nurseryperson to prevent the spread of parasites and pests on the one hand, and to control the root system which could host parasites, on the other

hand. If the sanitary conditions are met, a pass is issued to nurserymen evidencing a final approval of the nursery for the current year

Control of wood packaging manufacturing units:

Any company involved in activities of manufacturing and processing of wood packaging materials(pallets, crates), destined for international trade must be approved by the National Agency for Sanitary Safety of Food Products so as to acquire the right to apply the marking of the standard 15 of the International Plant Protection convention (CIPV) .

In accordance with this standard, phytosanitary certification system for wood packaging material aims for the respect and compliance with the application of the phytosanitary measures, in order to prevent the introduction or spread of pests that can harm the national plant heritage .

The phases of control and certification of packaging units involve:

- Filing with the Regional Plant Protection Service (PPS) concerned an application (PPS form) accompanied by the following documents: Certified copy of the articles of association of the company, Copy of Identity card of manager, certified true copy of the certificate of ownership of the premises or lease, Legalized copy of the professional tax or the trade register, Photos of the premises and warehouse, certified true copy of the authorization of the authorities, staff list and name of the technical manager, technical documents of the packaging processing equipment ;
- Documentary control;
- Identity and physical Control and of the unit and processing equipment (oven);
- Issuance of Certificate of Conformity.

The list of authorized wooden packaging units is available on the website of the ONSSA at the heading: Emballage en bois: www.onssa.gov.ma

CONTROL OF SEEDS:

Production, control, certification and marketing of seeds are governed by the provisions of Dahir No. 1 69-19 of 25 July 199, as amended by the Dahir No. 1 76- 42 of 19 September 197 and its implementing texts set out below.

- The 9 ordinances related to the approval of the technical regulations regarding the production, control, packaging and certification of seeds of small grain cereals, maize, food legumes, fodder crops, oilseed crops, sunflower hybrids, industrial and fodder beet, cotton, standard vegetable seeds and potato seeds;
- Ordinance No. 96693 of 20 April 193, as amended by ordinance No. 382894 of 9 November 194 laying down the conditions for the import of seeds and seedlings.

Seed certification aims to make available to farmers authentic and healthy certified seeds, which contributes to the improvement of agricultural production.

Only the productions of the varieties listed in the official catalogue may be accepted for the controls and certification.

The control for the purpose of certification is conducted at all stages of production. It is based on controlling the descent of generations from the starting material to commercial seed. The controls carried out take place in three stages:

- controls in the field,
- controls in the laboratory,
- Post-controls.

The controls in the field are carried out in accordance with the requirements of technical regulations in force, and based on the methods established by OECD Systems (Organisation for Economic Cooperation and Development). These checks are performed in two periods:

- The phytosanitary control which involves the verification of the technical conditions and health status of crops;
- The varietal and specific control which consists in determining impurities of other species and other varieties existing in the prorogation field.

The laboratory control is carried out on samples of products certified in the field. This control is conducted according to the methods of the International Seed Testing Association (ISTA) and includes two types of analysis: physiological analysis (germinative capacity) and physical analysis (specific purity, specific weight, humidity, the weight of 100 grains, number of seeds of other cereal species and other plants).

Seed batches that meet the standards of controls in the field and in the laboratory stipulated in technical regulations are sealed and labelled after treatment. The labels bear the indications of the productions (species, variety, category, number, weight of the batch). They should be white for the pre-basic and basic seeds and blue for the first generation seeds and red for the second generation seeds.

The post-control is performed in accordance with the requirements of the OECD systems. It is carried out on the batches of seeds of different categories



which met the certification standards in the field and in the laboratory. It is systematic for the pre-basic seeds, 20% for the first generation seeds and 10% for the second generation seeds. This control is also exercised on the consignments of imported seeds.

The technical regulations of production, control, packaging and certification are available at the following address:

[www.onssa.gov.ma/onssa/fr/Contrôle des semences et plants/Contrôle et certification des semences](http://www.onssa.gov.ma/onssa/fr/Contrôle%20des%20semences%20et%20plants/Contrôle%20et%20certification%20des%20semences)

CONTROL OF CERTIFIED SEEDLINGS:

The use of certified seedlings ensures for farmers varietal authenticity and health quality. The certified seedlings are produced by nurserymen who own a recognized timber yards of high performance, authentic and healthy varieties listed in the catalogue and which adapt to the Moroccan soil and climatic conditions.

Production, control, certification and marketing of seedlings are governed by the provisions of Dahir No. 1 69-19 of 10 Jumada I 139 (25 July 199), as amended by the Dahir as law No. 1 76-42, 05 Shawwal 137 (19 September 197) and its implementing regulations:

- The technical regulations relating to the production, control, packaging and certification of the seedlings of olive, citrus, stone and pome Rosaceae, wine, date palm, strawberry, sugarcane, argan, saffron bulbs and fig tree.
- The order No. 96693 of April 20, 193, as amended by Decree No. 382894 of 9 November 194 laying down the conditions for the import of seeds and seedlings.

The technical regulations of production, control, packaging and certification are available at the following address:

[www.onssa.gov.ma/onssa/fr/Contrôle des semences et plants/Contrôle et certification des plants](http://www.onssa.gov.ma/onssa/fr/Contrôle%20des%20semences%20et%20plants/Contrôle%20et%20certification%20des%20plants)

Technical regulations specify the criteria which are needed to be in the nurserymen, the categories of plant material in multiplication (starting material, pre-basic, basic and certified), the production techniques and the various stages of control and certification.

Control of seedlings for the purpose of certification is exercised at all stages of production. It is based on controlling the descent of generations from the starting material till the certified seedling.

Control is as follows:

- control in the nursery in order to check the origin of the plant material, isolation, rotation, number of seedlings produced, the percentage of recovery, health status and varietal authenticity;
- Control in the laboratory focuses on screening for diseases mentioned in the technical regulations for specific for each species.

Only the recognized seedlings in the nursery and in the laboratory are certified. The latter bear a red label stating the name of the nursery, the name of the variety and batch number. The certified seedlings may be marketed only by accredited bodies in accordance with the Decision of the Minister of Agriculture No. 33 of July 16, 2013.

Variety registration:

The registration of the varieties is governed by the provisions of Dahir No. 169-19 of 25 July 199, as amended by the Dahir No. 176-42 of 19 September 197 and its implementing texts set out below.

- Order No. 863 75 of 22 September 197 laying down the conditions for registration of varieties in the official catalogue;
- Order No. 864 75 of September 22, 197 amended and supplemented by Order No. 3538 13 of 4 December 203 relating to the composition and powers of the National Committee for the Selection of Seeds and Seedlings;

The registration of varieties in the official catalogue aims to protect users by providing them with high yielding varieties adapted to soil and climatic conditions of the country.

All of the new varieties stemming from national programmes of varietal breeding or introduced from abroad must undergo experimentation prior to the registration in the catalogue. This experiment includes two types of tests conducted in parallel:

- A control test for distinctiveness, uniformity and stability of the variety (DUS)
- Tests of agronomic and technological value (ATV), Test results (DUS and ATV) are reviewed by technical sections. The latter submit their proposals to the National Committee for the selection of seeds and seedlings (CNSSP) which will decide on the varieties based on the results obtained and their economic advantage for the Moroccan agriculture.

The proposals of CNSSP are submitted to the Minister of Agriculture who authorizes, by an order, the registration of the variety in the official catalogue.

This order sets also the period of validity of the registration, which is 10 years, and the conditions for re-registration.

The list of varieties registered in the catalogue is updated regularly and available at the following address:

[www.onssa.gov.ma/onssa/fr/Contrôle des semences et plants/Homologation des variétés](http://www.onssa.gov.ma/onssa/fr/Contrôle%20des%20semences%20et%20plants/Homologation%20des%20variétés)

Plant Variety Protection

The law 994 related to the Protection of Plant Varieties was promulgated by Royal Decree No. 196-25 of 21 January 197. This law complies with the provisions of the 191 Convention of the International Union for the Protection of Varieties of Plants (UPOV).

The law came into force on October 28, 202, date of publication of the application texts listed below:

- Decrees No. 201 2324 and No. 201 2325 of March 12, 202;
- 6 ordinances No. 1577 02, No. 1578 02, No. 1579 02, No. 1581 02, No. 1580 02 and 1582 02 of 16 September 202.

The protection of plant varieties by certificate allows recognizing and guaranteeing the right of the breeder. The protection applies to varieties belonging to the genus and species whose list is determined by an order of the Minister of Agriculture.

The new varieties, which have a name and possess the distinguishing characteristics, uniformity and stability, are eligible for protection by the new variety certificate,

The plant variety right may be required by legal or natural persons whether they are Moroccan and foreign ones.

The applications for giving plant variety certificates regarding the varieties for which distinctiveness, uniformity and stability (DUS) are completed or the DUS review report is transferred are examined by the National Committee for the Selection of Seeds and Seedlings (CNSSP), which meets in April and September of each year.

The duration of protection begins from the date of the publication of the order of the Minister of Agriculture regarding the protection of new plant varieties in the Official Journal. It is 20 years for major crop species, 25 years for tree species and wines and 30 years for the date palm.

The list of new protected varieties is updated regularly and is available at the following address:

[www.onssa.gov.ma/onssa/fr/Contrôle des semences et plants/Protection des obtentions végétales](http://www.onssa.gov.ma/onssa/fr/Contrôle%20des%20semences%20et%20plants/Protection%20des%20obtentions%20végétales)

IMPORT AND MARKETING OF SEEDS AND SEEDLINGS:

The importation and marketing of seeds and seedlings are regulated by Decree No. 96- 93 of 20 April 193. This decree provides that:

- The establishment must be accredited;
- The variety must be recorded in the official catalogue or in the provisional lists drawn up for this purpose;
- The seeds must be certified according to the OECD scheme and meet the EEC standards or be standard category for vegetable species.

The decree also provides for the introduction of limited quantities of new varieties for their prior experimentation.

LICENCE FOR MARKETING OF SEEDS AND SEEDLINGS:

Seeds and seedlings can be marketed only by accredited bodies by an order of the Minister of Agriculture, pursuant to the Article 5 of Dahir No. 176-42 of 19 September 197.

The decision of the Minister of Agriculture and Maritime Fisheries No. 33 of 16 July 203 stipulates, for the granting of licences for the marketing of seeds and seedlings, the following conditions:

- The approved establishments can market only the seeds and seedlings belonging to the varieties listed in the official catalogue;
- The institutions should have the services of a qualified agricultural technical staff and the means of production and / or suitable premises for the storage and preservation of seeds and seedlings;
- The institutions must have a trade register and articles of association, specifying a marketing activity of seeds and/or seedlings;
- The institutions agree to participate in the promotion of the sector of seeds and seedlings.

Applications for granting licenses are reviewed by a committee composed of representatives of the profession of the administration. The Presidency and the secretariat of the Committee are provided by ONSSA.

The licence is valid for a period of five years from the date of its publication in the Official Journal. It can be renewed after a filing of a new application for granting license.

The list of approved establishments printing and marketing of seeds and seedlings is updated regularly and available at the following address:

[www.onssa.gov.ma/onssa/fr/Contrôle des semences et plants/Commercialisation](http://www.onssa.gov.ma/onssa/fr/Contrôle%20des%20semences%20et%20plants/Commercialisation)

Charges for services rendered:

Charges for services rendered by ONSSA for the registration of varieties, protection of plant varieties, the granting of licences, marketing of seeds and seedlings as well as the control and certification of seeds and seedlings are subject to the payment of charges whose amounts and payment method are available on the site:

[www.onssa.gov.ma/onssa/fr/tarifs des prestations\]](http://www.onssa.gov.ma/onssa/fr/tarifs%20des%20prestations)

REGULATIONS RELATING TO THE AGRICULTURAL PESTICIDES:

The legal arsenal regulating the importation, manufacture, possession for sale, sale or distribution, even for free, of pesticide products for agricultural use is composed particularly of the following texts:

- The Dahir of 2 December 192 regarding regulation on the import, trade, possession and use of poisonous substances;
- Law No. 4295, promulgated by Dahir No. 1 - 9701 of 12 Ramadan 147 (January 21, 197) relating to the control and organization of trade of pesticide products for agricultural use as it was amended and supplemented by law No. 3200 amending and supplementing law No. 4295 promulgated by Dahir No. 1 - 9701 du 12 Ramadan 147 (21 January 197);
- Decree No. 299-15 of 18 Muharram 140 (May 5, 199) pertaining to the approval and registration of pesticide products for agricultural use and Decree No. 299-16 of May 5, 199, relating to the exercise of activities of import, manufacture and marketing of agricultural pesticides;
- Decree No. 201-133 of 28 Jumada II 142 (September 17, 201) establishing the committee on pesticide products for agricultural use.

It is thus required to obtain an approval certificate or, failing that, a sales authorization from ONSSA.

Moreover, the approval and registration of agricultural pesticides is performed according to a procedure which aims to ensure efficiency, selectivity and safety of the product to be marketed. It comes after an examination having as a purpose the verification of their efficacy and safety towards humans, animals and their environment. This check can be performed, particularly by monitoring their chemical, biological, toxicological or physical performance, supplemented eventually by biological tests carried out by the authorities responsible for the protection of plants.

After study and consideration, the applications for approval and registration are submitted for an opinion to the Committee on agricultural pesticides, established by Decree No. 201-133 of September 17, 201, which shall evaluate them. Approvals are then granted for a renewable period of ten years, and after review, for the same duration and this at the request of the applicants. On the other hand, the authorization for sale is granted for a period of four years which may be extended for a maximum period of two years.

Natural or legal persons wishing to carry on the business of manufacturing, importation, distribution and retail sale of agricultural pesticides must first obtain a license issued by MAPM after preliminary verification related to competence of the stakeholders and the quality of local use.

And in accordance with the 2807 law enacted by Dahir No. 1 10-08 of 26 Safar 141 (11 February 200) related to the health safety of food products, and the ordinance of the Minister of Agriculture and Maritime Fisheries No. 1129 1113 of 21 Jumada I 144 (2 April 203) regarding the register of maintenance

and management of primary products of plant origin, the ONSSA ensures the establishment and control of the registers at the level of agricultural farms, showing the use of chemical and organic materials for crop management and maintenance.

The list of the approved agricultural pesticides, the list of the recognized phytosanitary companies, minutes of the meetings of the Committee on agricultural pesticides and the regulations which are published in the phytosanitary index are available at the following website:

<http://eservice.onssa.gov.ma:802/>

Licence for Veterinary Inputs and drugs.

The Division of Pharmacy and Veterinary Inputs is responsible, under the authority of the Director of Veterinary Services, for the control of the veterinary inputs and pharmaceuticals.

The manufacture, import and wholesale of veterinary drugs are regulated by the following legal arsenal:

- Dahir No. 180-30 of 17 Safar 141 (26 December 190) promulgating Law No. 2180 related to the private practice of veterinary medicine, surgery and pharmacy.
- Decree No. 282-51 of 29 Jumada I 143 (15 March 193) issued for the implementation of Law No. 2180.
- Joint Circular No. I / 94 related to the establishment of the applications for authorization for the marketing of medicinal products for veterinary use.
- Joint Circular No. 84 of June 7, 07 related to the Good Manufacturing Practices and Good Distribution Practices (Appendix 1, Appendix 2, Appendix 3, Appendix 4).
- Circular Note related to the pharmacovigilance

procedure for veterinary drugs.

Registration and authorization of import of biocidal products used in the fields of animal husbandry and agri-food industry, are made in accordance with the circular note related to the authorization of livestock biocides (disinfectants, antiseptics ..).

The registration, licensing and marketing of additives of premixes and complementary feedstuffs for animal feed are governed by the following:

- Dahir promulgating Law No. 2807 relating to the sanitary safety of food and its implementing decree;
- The order of the Minister of Agriculture and Maritime Fisheries No. 1490 1413 of May 3 2013 establishing the list and maximum levels of undesirable substances in animal feed as well as the list and the limits of the use of additives, premixes, compound feed and complementary feedstuffs reserved for the animal feed;
- The code of procedure regarding the authorization of additives of premixes and complementary feed intended for the animal feed.

The regulations governing veterinary medicines and inputs and positive lists of authorized products are available on the website of ONSSA at the following address: http://www.onssa.gov.ma/fr/index.php?option=com_content&view=article&id=46&Itemid=38

REAL ESTATE SYSTEM:

The main rights which may be registered with the National Agency for Land Conservation, Land Registry and Mapping(ANCFCC) , pursuant to the Article 65 of Law No. 14 07 promulgated by Dahir No. 1 11-1 7 of 25 hija 14 2 (22 November 20 1), completing and amending the Dahir of 9 Ramadan 13 1 (12 August 193) relating to land registration, involve:

- All acts and conventions inter vivos, for free or for profit;
- All minutes of execution against real property;
- All res judicata judgments ordering to constitute, transmit, declare, modify or extinguish a right in rem in immovable property;
- All leases of buildings exceeding three years;
- Any discharge or assignment of a sum worth over one year of non due rent;
- All deeds such as forced mortgage, petitory action brought to court to know the ownership of a building, court orders and right of inheritance and bequests;
- All material operations intended to change the nature, substance or extent of the property, such as construction and destruction;
- Some references relating to marital status and matrimonial regime aimed to amend the civil status of owners and holders of rights in rem encumbering the registered building.

Further details are available at the official website of the ANCFCC: www.ancfcc.gov.ma

OTHER REGULATIONS OF THE SECTOR:

There are several other regulations in the agricultural sector, particularly in terms of labelling, interprofession and animal farming, which are available at the official website of the ministry of agriculture MAPM: www.agriculture.gov.ma



General Normative and Legal Framework

CHARTER OF INVESTMENT:

The investment in Morocco, particularly in agro-industry, is governed by the Framework Law No. 1895 promulgated by Dahir No. 195-23 of 14 Jumada II 146 (8 November 195) forming the Investment Charter and its implementing regulations. The latter, while specifically excluding the agricultural sector, under its Article 24, reflects the fundamental objectives of the State's action for the development and promotion of investments by providing an improved climate and conditions relating thereto, a revision of tax incentives field and a set of specific incentive measures, which can be outlined by the programs planned in this framework.

In the tax field, the advantages made relate to customs duties, tax levies on imports, VAT, registration fees, professional tax, local taxes, the corporate tax, the income tax and amortization of investments in capital goods.

With regard to financial incentives, the regulation allows, if the amount of the investment or the number of stable jobs created justify it as well as for some pre-defined localisations, for the state to bear and take care, within the framework of a contract with the investor, of certain types of expenses, such as those relating to the cost of land acquisition for the execution of the project, the expenses of external infrastructures and cost of vocational training.

In terms of foreign exchange regulations, specifically for the investments made in foreign currencies by the foreigners and the Moroccans living abroad, the guarantees of transfer of net profits after tax without limitation of amount nor duration, and the transfer of the proceeds of sale or total or partial liquidation are also given.

CUSTOMS SYSTEM:

Morocco concluded with several countries and economic groups, preferential agreements providing for customs facilities and advantages. There follows different regimes that are applied to economic operators depending on the specific operations conducted. The main regulations in force, namely the Code and regulation of customs, the tariffs of customs duties and the agreements and conventions signed by the country, are directly consulted at the official website of the Directorate of Customs and Indirect Taxes (ADII) of Morocco: www.douane.gov.ma

TAX SYSTEM:

The provisions applicable to taxes and duties arise notably from the General Tax Code (CGI) and Law No. 4706 promulgated by Dahir No. 107-15 of 19 kaada 148 (30 November 207) regarding taxation of Local Collectivities (local authorities), as amended and supplemented, and its implementing regulations. These are available at the official website of the General Directorate of Taxes (DGI) of Morocco: www.tax.gov.ma

In this regard, it is important to note that the agricultural sector in Morocco enjoys significant tax exemptions. In addition, investors benefit from specific tax advantages resulting in total or temporary exemptions, and / or reductions resulting in the application of preferential rates.

FOREIGN EXCHANGE SYSTEM:

The foreign exchange system in Morocco, even if it is regulated, is fairly flexible and offers interesting possibilities for economic operators. This system thus provides for, among others, the following guarantees:

- The convertibility for the operations of the foreigners' investments. Therefore, foreign investors are ensured

a full freedom for the execution of their investment operations in Morocco, the transfer of income generated by these investments and the transfer of the proceeds of liquidation or sale of their investments;

- The convertibility for current operations made by Moroccan companies, such as those related to the free implementation of their foreign trade operations, transfer of the payments due to non-residents and foreign suppliers and having the foreign exchange needed to cover their professional expenses abroad.
- In this regard, the natural or legal persons established and settled in Morocco may carry out the import or export of goods without any limitation except for some products subject to the prior approval of the Ministry of Foreign Trade.
- The possibility of the free opening in the Moroccan banks of accounts in foreign currency or in convertible MAD for the foreign investors and the Moroccans residing abroad. These accounts are credited with payments made in foreign currency or with sums which are transferable from Morocco and debited for payments in Morocco or abroad.

Non-resident operators who hold contracts or procurements concluded in Morocco have also the possibility to open a «special» account denominated in MAD for the needs of their temporary activity in Morocco.

The provisions applicable to foreign exchange system are available on the official website of the Foreign Exchange Office of Morocco: www.oc.gov.ma

INCORPORATION OF A COMPANY:

The different legal forms of companies in Morocco are:

- The Public Limited Company (SA);
- The Limited Liability Company (SARL), which may also be formed by a single member (SARL AU);
- The General Partnership (SNC);
- The joint-venture company (SP);
- The Limited Partnership (SCS) and the Company Limited by shares (SCA).

The SA is governed by Law No. 1795 promulgated by Dahir No. 196-14 of 14 rabii II 147 (30 August 196) relating to the public limited companies, as subsequently amended and supplemented, particularly by law No. 2005 of 17 Jumada I 149 (23 May 208). The other forms of companies are governed by Law No. 596 promulgated by Dahir No. 197- 49 of 05 Shawwal 147 (13 February 197) regarding the general partnership, the limited partnership, the company limited by shares, limited liability company and the joint-venture company, as amended and supplemented by law No. 2410 of 29 Jumada II 142 (2 June 2011).

The creation of a company requires the execution of the following:

- Obtaining the negative certificate;
- Drawing up the articles of association;
- Drawing up of subscription forms and, where applicable, the deed of contribution;
- Freezing of the paid-up capital;
- Establishment of the declaration of subscription and payment;
- Publication in the Official Gazette and in a newspaper of legal notices;

- Filing of certificates of incorporation and execution of the registration formalities;
- Registration for the professional tax and Fiscal Identification (corporate tax, income tax and VAT);
- Registration in the Trade Register;
- Membership of CNSS and declaration of existence to labour inspection.

The execution of the above procedures is facilitated by the “investors’ help desk” established in every Regional Investment Centre (CRI). In this regard, further details can be obtained on the official website set up by the Ministry of Interior for this purpose: www.cri.ma

INCORPORATION OF A COOPERATIVE:

Cooperatives are governed by Law No. 2483 promulgated by Dahir 1 - 83226 of 9 Muharram 145 (5 October 194), determining the general status of cooperatives and the functions of the Office of the Cooperation Development (ODCO) as amended and supplemented, and its implementing regulations.

The incorporation procedure comprises then the following main steps:

- Declaration of incorporation: it is drawn up and sent to the ODCO;
- Drawing up of the articles of association ;
- Holding of the Constitutive General Meeting;
- Obtaining the licence of the cooperative from the ODCO on the basis of a file containing the articles of association, the minutes of the constitutive general meeting, the list of subscribers and a certificate of payment of the paid up capital.

The ODECO has Regional Delegations to directguide and assist those who wish to create a cooperative.

CREATION OF AN ECONOMIC INTEREST GROUP (EIG):

Law No. 1397 promulgated by Dahir No. 199-12 of 18 Shawwal 149 (February 5, 199) relating to the economic interest group. This is an intermediate form between a company and an association and can only have the purpose of the extension of the activities of its members enabling them to carry out joint actions while maintaining their independence.

An EIG has the following characteristics:

- It is governed by a legal deed signed by its members;
- It can have a civil or commercial nature. This nature is derived from either the capacity of its members when they are all traders or non-traders, or the activity effectively carried out by the EIG when it is composed of both traders and non-traders;
- The contributions are an essential part of the creation of the EIG. In the absence of these contributions, the rights of the members arise from their predefined participation in the articles of association;
- The name of the EIG must be a name that can only be used by it and shall be indicated on the deeds and documents of the group with the term ‘EIG’.

LABOUR LAW:

Moroccan labour law, as defined in Law No. 6599 promulgated by Dahir No. 103-14 of 14 Rajab 144 (11 September 203) relating to the Labour Code and its implementing regulations, is characterized by its consistency with international standards set in the conventions of the United Nations and the agencies specialized in the field of labour.

The protected rights of employees and the exercise thereof, inside and outside of the organization, is guaranteed, include those contained in the ratified

international labour Conventions and the rights provided for by the main conventions of the International Labour Organization, which include particularly:

- Freedom of association and the effective adoption of the organizing and collective bargaining rights;
- The prohibition of all forms of work by compulsion;
- The effective abolition of child labor;
- The prohibition of discrimination in employment and occupation.

Furthermore, during the procedure of settling individual or collective labour disputes, the following are taken into consideration:

- The Labour Code, the conventions and international charters ratified in the field;
- The collective agreements;
- The employment contract;
- The arbitration decisions and case law;
- The custom and usage if they are not in conflict with the provisions of the Labour Code;
- The general rules of law;
- The principles and rules of equity.

Finally, the Labour Code, supplemented, if necessary, by the statutes, provides a comprehensive framework for personnel administration, thanks to different aspects such as those set out below.

- The different forms of employment contract (fixed term contract, permanent contract, contract to perform a specified task, ANAPEC contract ...)
- The collective employment agreement;
- Collective bargaining;

- Working conditions: working hours, protection of minors and women, health and safety ...
- Trade unions, delegates of employees, the works council and union representatives in the company;
- Intermediation in recruitment and hiring;
- Monitoring bodies;
- The modes of settlement of collective labour disputes...

Further details are contained in the official website of the government authority in charge of employment: www.emploi.gov.ma

Exigences environnementales:

The National Environment and Sustainable Development Charter was adopted on 24 April 200 on the occasion of the celebration of the World Day of the earth. This is part of a unifying logic, wanting to work on the following purposes:

- Focusing on the complementarities and interdependencies between environmental protection and development;
- Improving knowledge and encouraging the adoption of principles of environment protection and sustainable development;
- Promoting a cultural change in favour of responsible attitudes towards the environment;
- Defining the commitments of the Parties concerned at the national level.

This charter, based on a set of values and principles (sustainable development, social progress, preservation and promotion of heritage, precaution, prevention, participation, R & D, responsible production and consumption...) is supported by a legal arsenal to guarantee its effectiveness, and involves the following:

Protection and enhancement of the environment (General provisions):

The general provisions on environmental protection and enhancement arising from Law No. 1103 promulgated by Dahir No. 1- 0359 of 10 rabii I 144 (12 May 203) and its implementing regulations. These regulations set out the guiding principles for the protection and management of the environment and deal with the obligations that pose a risk to the environment, and provisions to fight against pollution and nuisances. They refer also to environmental management instruments such as the norms and standards to apply, the impact studies and the development of contingency plans.

Water quality:

Pursuant to the provisions of Law No. 1095 promulgated by Dahir No. 195-14 of 18 rabii I 146 (16 August 195) on water (Article 51) and its implementing regulations, particularly the Decree No. 297-77 of 6 Shawwal 148 (4 February 198) relating to the standards of quality of the degree of water pollution, several water quality standards were set in order to fix the requirements which an environment must meet according to the different uses.

Waste management:

It is governed particularly by:

- Law No. 2800 promulgated by Dahir No. 106-13 of 30 Shawwal 147 (November 22, 206) relating to waste management and disposal;
- Decree No. 207-23 of 14 Rajab 149 (July 18, 208) regarding waste classification and determining the list of hazardous waste;
- Decree No. 209-19 of 25 Jumada I 140 (May 21, 209) pertaining to the management of medical and pharmaceutical waste;

- Decree No. 209-24 of 20 hija 140 (December 8, 209) laying down the administrative procedures and the technical requirements for controlled landfills;
- Decree No. 209-25 of 23 Rajab 141 (July 6, 206) laying down the procedures for developing the prefectural or provincial master plan for the management of household and similar waste and the procedure for the organization of the public inquiry related thereof;
- Decree No. 209-63 of 23 rejev 141 (6 July 200 laying down the procedures for developing the Regional Master Plan for the management of industrial waste, non-hazardous medical and pharmaceutical, ultimate waste, agricultural and inert and procedure to the public inquiry organization linked to this plan.

Fight against air pollution:

It arises particularly from the Law No. 1303 promulgated by Dahir No. 103-61 of 10 rabii I 144 (12 May 203) relating to the fight against pollution of the air and from the Decree No. 209-61 of 23 Rajab 141 (July 6, 200) fixing the limit values of emanation, emission or discharge of pollutants into the air emitted from stationary pollution sources and the modalities of their control.

Environmental impact assessment (EIA): They are governed by:

- Law No. 1203 relating to the impact studies;
- Decree No. 204-53 regarding the functions and operation of the national committee and the regional committees of the EIA;
- Decree No. 204-54 fixing the modalities of organization and conduct of the public inquiry related to the projects subject to EIA.

For further details, it is appropriate to refer to the official sites of the governmental authority of the environment: www.mem.gov.ma et www.water.gov.ma

NORMATIVE FRAMEWORK OF REFERENCE:

In general, standards help to increase the reliability and performance of the goods and services and constitute the basic reference for any certification system and control of their conformity.

Moroccan standards dealing with agribusiness are structured as follows:

- Plant products;
- Canned fruit and vegetable products;
- Other products derived from fruit and vegetables;
- Milk and its derivatives;
- Other food industry products (sugar, oil, tea ...)
- Meat and meat products;
- Fishery products;
- Tobacco, tobacco products and related equipment;
- Organic Farming. some examples of standards are as follows:

NM 08 1.200 1998	Soft wheat - Specifications
NM 08 1.214 1999	Durum wheat - Specifications
NM ISO 3100 1-97	Meat and meat-based products - Part 1: Sampling
NM 080.02	Management system HACCP-requirements

STANDARDIZATION :

Standardization is the activity that involves the development of standards. It is governed by the following regulations:

- Dahir No. 170-17 of 26 Jumada I 130 (30 July 190) related to the industrial standardization for the search for quality and productivity improvement, as amended and completed particularly by the law No. 193-21 of September 10, 193;
- Decree No. 270-34 of 6 Sha'ban 130 (October 8, 190) setting out the composition and functions of the agencies responsible for the industrial standardization, with the aim of searching for quality and productivity improvement;
- Decree No. 03 of 293-50 rabii II 144 (September 20, 193) issued for the application of Dahir No. 170-17 of 26 Jumada I 130 (July 30, 190) related to the industrial standardization with the aim of searching for quality and productivity improvement.

The standardization unit is composed of the poles in charge of the following sectors:

- Chemistry and Parachemistry;
- The agri-food;
- The textile and leather;
- The mechanics, metallurgy and electricity;
- The building and public works;
- The health, safety, quality and environment.

The technical works on the development of Moroccan standards are conducted by Technical Standardization Committees (TSC). It occurs in 8 major steps as shown in the following diagram:



CERTIFICATION:

Certification is the procedure by which a competent «third party», gives a written assurance that an entity (product, process, person or service) conforms to the specified requirements. This is a voluntary process that can be undertaken by any entity. In this regard, there are several types of certification:

- Certification of quality management systems (ISO 90 1: 208);
- Certification of Environmental Management Systems (ISO 140 1: 204);
- Certification of the workplace safety and health system (NM 005.8 1: 209);
- Certification of industrial and agri-food products according to the Moroccan standards of corresponding specification;

- Labelling of industrial and agri-food products in accordance with corresponding Moroccan standards;
- Certification of the system of Hazard Analysis and Critical Control Point (HACCP);
- Certification of food safety management system (ISO 22000) ;
- Certification of social conformity (NM 005.6 1).
- NM certification of products: NM certification of a product results in obtaining the right to use the NM mark on the certified product.

NM mark:

The NM mark is a voluntary national certification mark which, placed on a product, attests that the latter has been assessed and certified conform to the Moroccan standards related to it.

Certification frame of reference:

For a given product, NM mark management is done in accordance with the following frame of reference:

- The circular relating to the granting of the right to use the mark of conformity with the Moroccan standards on products;
- The circular specific to the product and which essentially set the autocontrol modalities;
- The standards of specifications and testing of the said product.

ISO 2200 certification:

ISO 2200 is to date the only international standard harmonizing the management practices of food safety. It is applicable to all players in the food chain.

ISO 2200 standard is based on four main blocks closely related:

- The responsibility of management;
- The resource management;
- Planning and realization of safe products;
- The validation, verification, and improvement of the system of food safety.

Certification is thus the assurance given to the various stakeholders in the food chain of a more efficient and dynamic control of the hazards related to food safety, the ability to continuously provide safe finished products satisfying both the customer requirements and the international regulatory requirements for hygiene and food safety

HACCP Certification:

HACCP is an abbreviation of the expression «Hazard Analysis of Critical Control Points». This is a voluntary certification mark certifying that the system of the body concerned has been assessed and certified conform to the following references:

- The regulation in force;
- The NM 080.00 standards' General principles: Food hygiene 'and HACCP: NM 080.02: HACCP management system - Requirements' or the equivalent international ones;

- The circular related to the HACCP certification;
- This certification is designed for the food companies or the ones with customers or suppliers in this sector; Stakeholders in the certification when it is made by MICNT (Ministry of Industry, Commerce and New Technologies):
- Certifying body: the Ministry of Industry which grants the certification through the Moroccan Standardization Institute (IMANOR). The latter was established by Law No. 1206 and its implementing regulations. It then resumed the activities performed in the past by the Moroccan Industrial Standardization Service (SNIMA)
 - Technical Committees for Certification (TCC) : they are established by a ministerial order on a proposal from the IMANOR;
 - Qualified auditors/ Verification Agents, responsible for the verification and monitoring visits;
 - Accredited Testing Laboratory

Institutional Framework

The institutional framework, as reported below, includes the Ministry of Agriculture and Maritime Fisheries , as the government authority in charge of agriculture, the organizations under its supervision, each specialized according to the field of intervention and , where applicable, according to the territory concerned and the professional organizations.

 <p>Ministry of Agriculture and Maritime Fisheries (MAPM) www.agriculture.gov.ma</p>	 <p>Agency for Agricultural Development (ADA) www.ada.gov.ma</p>	 <p>National Agency for the Development of Oasis zones and Argan tree (ANDZOA) www.andzoa.ma</p>	<p>Regional Offices for the Agricultural Development (ORMVA) www.agriculture.gov.ma</p>
 <p>National Office for the Sanitary Safety of Food Products (ONSSA) www.onssa.gov.ma</p>	 <p>National Office for the Sanitary Safety of Food Products (ONSSA) www.onssa.gov.ma</p>	 <p>National Institute for Agricultural Research (INRA)</p>	 <p>Hassan II Institute of Agronomy and Veterinary (IAV)</p>
 <p>Royal Society for Horse Encouragement (SOREC) www.agriculture.gov.ma</p>	 <p>National Agency for Land Registration, Survey and Mapping (ANCFCC) www.iav.ac.ma</p>	 <p>National Interprofessional Office of Cereals and Legumes (ONICL) www.onicl.org.ma</p>	 <p>National Office for Agricultural Consulting (ONCA) www.onca.gov.ma</p>
 <p>Ecole Nationale d'Agriculture (ENA) www.enameknes.ma</p>	 <p>National Company for Seed Marketing (SONACOS) www.agriculture.gov.ma</p>	 <p>Port Silos Company (SOSIPO) www.sosipo.com</p>	 <p>Autonomous Establishment for Export Control and Coordination (EACCE) Web2.eacce.org.ma</p>

Focus on the Agency for Agricultural Development

The Agency for Agricultural Development (ADA) plays a fundamental role, since its establishment in 2009, in achieving the strategic goals set for the agricultural sector by the year 2020, so as to ensure the continuity and integrity of the 'Green Morocco Plan' vision.

Boosting PMV initiatives, promotion and renewal of 'Morocco Offer', launching concrete projects, intermediation,

implementation monitoring, and management of partnerships with institutional and social investors constitute the core tasks entrusted to the ADA.

Through the role assigned to it, the ADA has positioned itself as an indispensable facilitator and guide for private and social investors and undeniable promoter of «the investment offer,» and «social offer» characterizing the agricultural sector in Morocco.

Main Professional organisations

FIMASUCRE	Moroccan Interprofessional Sugar Federation
FIMALAIT	www.fimasucre.ma
FISA	Interprofessional Federation of Poultry Sector www.fisamaroc.org.ma
FNM	National Federation of Milling Industry www.fnm.org.ma
FEDAM	Federation for the Development of Arboriculture in Morocco
FIVIAR	Interprofessional Federation of Red Meat
FCG	Federation of Fats Industries in Morocco
INTER PROLIVE	Moroccan Interprofessional Olive Federation
FENAGRI	National Federation of Agri-Food www.finagri.org
FICOPAM	Federation of the preserved agricultural products industries www.ficopam.ma
AMCEF	Moroccan Association of Strawberry packers and Exporters
AMMS	Moroccan Association of seed multipliers
AMSP	Moroccan Association of Seeds and Seedlings

APEFEL	Moroccan Association of Producers and Producers-Exporters of Fruits and Vegetables
ASPEM	Association of Producers of citrus fruits in Morocco
ASPEM	Association of Producers-Exporters of vegetables and early fruits and vegetables in Morocco
FIMD	Moroccan Interprofessional Federation of Dates
UNAPPSM	National Union of the Associations of Producers of Sugar Plants
AMABIO	Moroccan Association of Organic Production sector
FIMAP	Moroccan Interprofessional Federation of Beekeeping
FIMA ROSE	Moroccan Interprofessional Federation of Perfume Rose
FIMA SAFRAN	Moroccan Interprofessional Federation of Saffron
FIMA RGANE	Moroccan Interprofessional Federation of the Argan Sector
FF	Fresh Fruit
MFB	Maroc Fruit Board
FNCL	National Federation of grain and Legume Traders
ANPCL	National Federation of grain and Legume Producers
FNM	National Federation of Milling Industry
Other organisations	Southern Provincial Association of Camel Raisers

Marketing of Agricultural Inputs and Products



DOMESTIC MARKET

Marketing channels in Morocco (general overview):

The marketing of products in the internal market is carried out at the following main channels:

- The hypermarkets and supermarkets: they recorded a sustained growth since the 1990s. That is why the number of hypermarkets rose from 6 in 197 to over 20 in late 2011.
- Retail and service chains, and the franchises: they are developing rapidly from the 1990s. In addition, since 2005, the sector recorded a growth rate of more than 20% and in 2010, Morocco had nearly 30 franchise chains with over 220 sale outlets which concentrate in large cities, especially Casablanca and Rabat.
- Merchants' public spaces under the responsibility of the municipalities: whether concerning a wholesale markets or slaughterhouses, these spaces prevail with regard to the supplying of the local market in fruits, vegetables and meats. They have, for this purpose, a multitude of advantages.

A broad regional coverage:

- Significant volumes of transactions at the level of some wholesale markets;
- The possibility of their concession to the private sector (e.g. Slaughterhouses of Casablanca); An important role in fixing the prices of products;
- A health monitoring system, among others applied to the slaughter, guaranteeing the quality of products to the consumer.
- The local shops: they occupy an important place in the national economy due to its participation, in particular, in the creation of jobs. This mode of trade, economically and socially established in the national identity, holds many advantages, the most significant ones are:

- Proximity to consumers;
- established practices of payment facilities granted by traders to customers;
- Suitable opening hours;
- A personalized service associated with a personalized contact between merchants and customers

Focus on agricultural supplies:

Seed market:

The importation and marketing of seeds is governed by the regulatory provisions particularly stipulating that the institution must be accredited, that the variety must be recorded in the official catalogue or in the provisional lists, the seeds must be certified according to the OECD scheme and meet the EEC standards or be standard category for vegetable garden species and the introduction of limited quantities of new varieties for experimentation. In this regard, nearly 80 private institutions are authorized to import and market seeds in Morocco. They operate particularly in the areas of vegetable, oil and maize seeds.

Moreover, the seed sector includes a set of integrated activities, starting from Plant breeding to the marketing of the certified seed. Its main links are related to the activities of breeding, proration, packaging and marketing of seeds.

At the economic level, the seed sector achieve an annual average turnover of around MAD 60 million, while its potential turnover is MAD 27 billion. To remedy this situation, the previously presented performance contract was signed

Fertilizer market:

The liberalization of the fertilizer sector was made in Morocco in July 1990. As of that date, the interested parties can freely purchase fertilizer from the local or international market. The MAPM was assigned, on its part, with the mission of monitoring and evaluation of the supplying of the domestic market through:

- The establishment, in consultation with the private operators, indicative supply programs for imported and locally manufactured fertilizers;
- Effective monitoring of this supply through periodic consultation meetings with the Sharifian Phosphate Office (OCP) and other private operators, on the one hand, and the collection of information on the availability of fertilizers in the market, conducted regularly by the external services of the MAPM, on the other hand.

As for the domestic fertilizer production, mainly dominated by the OCP group, it covers, inter alia:

- The granular compound(NPK) ternary fertilizers: 14-28-14;
- The ammonium sulfo-phosphate (ASP): 19-38-0;
- The diammonium phosphate (DAP): 18-46-0;
- The mono-ammonium phosphate (MAP): 11-55-0;
- The triple superphosphate (TSP): 45% P₂O₅;
- The single super phosphate (SSP): 18% P₂O₅.

Other formulas are manufactured by fertilizer distribution companies, at the request of their customers, by physical mixing of fertilizers, with or without additives.

As for imports, they mainly concern nitrogen products and potash products. Other formulas of organic or mineral fertilizers, correctors of deficiencies or growth

regulators, are imported with the aim of providing for some very limited needs, particularly at the level of the intensive farming.

With regard to the consumption of fertilizers, an upward trend has been registered since 2000. However, a large gap exists between the theoretical needs and the volumes of fertilizer actually used. The annual fertilizer consumption ranges in fact from 750 000 t to 1 230 000 t.

The distribution of fertilizer consumption according to the crops shows a relative prevalence of citrus, vegetable crops and sugar crops. Moreover, the irrigated areas use almost 60% of the total consumption of fertilizers while rainfed agriculture, occupying much acreage, uses the rest.

As to the formulas used, the classic formulas dominate such as the granular complex ternary fertilizers.

The large scale distribution of the fertilizers in Morocco is ensured by more than a dozen companies, including one particularly large company. Subsequently, their local distribution occurs via three main channels:

- Direct sale from the premises of distribution companies. They relate mainly to contract crops such as sugar beet;
- Channels of resellers who buy from the factories and warehouses of distribution companies, and then cede them back to farmers;01
- Channels of sales outlets located at the level of work centres or centres of agricultural development (regional institutions of the MAPM) falling respectively under the jurisdiction of the DPA and ORMVA. These outlets are the main supplying source of fertilizer to small farmers who do not currently operate in the aggregation system.

Finally, the review of the evolution of fertilizer prices highlights successive increases although the OCP

continues to sell the fertilizer to national distributors at competitive prices compared to the international prices

Phytosanitary product market:

The market of phytosanitary products in Morocco is a diverse and globally attractive market. In the absence of manufacturing industry of these products, 95% of them are imported ready for use and the rest is formulated in pre-mix or concentrate. On the other hand, 35% to 45% of imports are repackaged in small packages tailored to the needs of small farmers.

Insecticides occupy from 40% to 55% of market share, followed by fungicides, from 35% to 45%, followed by herbicides that can vary between 10% and 15%, depending on the year and weather conditions.

In terms of proportion of total consumption, vegetable crops, despite the relatively small areas, consume the most of the products with 35%, followed by the plantations with 30%, then the cereals with 25% and finally industrial crops and others with 10 %. Intensive crops, particularly those intended for export and those cultivated under more or less controlled environments, consume most of the products. The farmers working in these sectors carried out reasoned treatment programs and for some others, integrated control programs to meet specific requirements.

The consumption of phytosanitary products varies from year to year, depending primarily on the recorded climate, the pressure of diseases and pest insects and according to the regions, methods of crop management and speculation.

Furthermore, the market of pytosanitary products in Morocco, consisting of the volumes actually purchased and consumed by farmers, do not necessarily follow the curve of imports because of the overlap between the calendar years and agricultural years.

The main reasons for this increase are the favourable weather conditions during the last decade, the transfer of state land to the private sector and the launch of PMV. However, as shown in the said table, the growth of imports in value remained steady since 2015, in an average of 15% per year, while in volume it is only 45% per year. Morocco is moving less and less towards the organophosphate products and more and more towards 'effective soft' products, more environmentally friendly and are used in moderate doses. The market of phytosanitary products is generally marked by three key players: importers-distributors, wholesale distributors and retail dealers. Each one plays a very important role in the distribution chain, and especially in the extension and the advice given to farmers.

Nearly 70 companies are licensed to conduct this activity in Morocco. However, this number is expected to increase, given the increase in the applications for licences under investigation.

In addition, there are 60 to 60 sales outlets of phytosanitary products between wholesale distributors and retail dealers. Most are concentrated in irrigated areas or the 'favorable rainfed' zones.

Finally, concerning the prices of phytosanitary products, they are generally set according to competition and the features and advantages of those products. However,

it should be noted that they have generally stagnated in recent years given the strong competition in place and the proliferation of generics on the market

Market of agricultural equipment:

The agricultural machinery market is very dynamic. In order to overcome the delay by Morocco in agricultural mechanization, the MAPM has adopted a set of guidelines based on:

- The improvement of production techniques, via the mechanization and increasing thus the productivity of all agricultural sectors;
- The development of the equipment with tractors and production equipment;
- The review of standards, rates and ceilings of subsidies granted to agricultural equipment with more flexibility of the related provisions and raising some fixed ceilings;
- The acceleration of the procedure of subsidy granted to the agricultural equipment and the homogenization of its application in the national territory.

In this context and specifically to stimulate the purchase of agricultural equipment, a set of incentive measures are taken:

- Important subsidies from the state, via the FDA;
- Specific tax advantages, like the VAT exemption with deductibility applicable to a large part of the said equipment.

In addition, agreements were signed, by banks partnering with the PMV, with agricultural equipment suppliers or

through their professional organizations to get specific financing offers.

Finally, the agricultural equipment market enjoys a highly developed offer that is ensured by the operators, some of whom cover the national territory. The agricultural equipment particularly involves:

- The wheeled and crawler tractors of different powers;
- Combine harvesters;
- The stationary internal combustion engines, the vertical axis pumps and the motor pumps called submersible pumps;
- Simple and combined drills;
- The retarvators (rotary tiller), scarifiers, sweeps and rodweeters;
- The fertilizer spreaders;
- The planters and transplanters for tubers and seedlings;
- The pick-up balers of seeds and sugar cane and beet loaders;
- The mechanical appliances for spraying insecticides products
- Plows;
- Anti-frozen fans;
- The anti-hail cannons;
- The steam jet apparatus for soil disinfection;
- The animal and plant genetic material;
- Container for the liquid nitrogen storage and transport of frozen animal semen

Marketing of Agricultural Products :

The agricultural market is fully liberalized. The selling prices can be followed through «Asâar», an information system set up by the MAPM in order to meet several objectives, particularly:

- Knowing, in real time, the prices of agricultural products, which allows farmers to make the arbitrages necessary to get the best price for their products;
- Compiling and disseminating information on the

prices in order to help the economic operators and the government in decision-making and strategic planning of the sector.

The system tracks the prices of products daily in nine wholesale markets, 25 souks and 20 retail markets. It covered particularly broilers, red meat, table eggs, grains, legumes, animal feed and vegetables.

The elements produced by the «Asâar» system are available on the website: www.prixagriculture.org/asaar.



The export of food products represented in 203 almost 11% of the Moroccan exports.

The values associated with the main exported products are, in billion MAD, shown in the following table:

20082014: Value of agricultural exports in billion MAD

Products / Year	2008	2009	2010	2011	2012	2013	2014*
Edible vegetables including :	4,3	4,8	5,1	6,0	5,7	6,9	5,2
Fresh tomatoes	2,0	2,4	2,5	3,5	3,4	3,6	2,8
Edible fruits including :	5,0	4,1	4,8	6,0	4,9	5,8	5,0
Citrus fruits	3,2	2,5	3,2	4,0	2,8	3,4	2,6
Preserves and preparations of fruits and vegetables	1,7	1,6	1,7	1,6	1,6	1,6	1,8

* This information is provided in late November 204
Source: MAPM / DSS (Directorate of Strategy and Statistics) / DDM (Database of the Exchange Office)

The main destinations of exports are those of the European Union, Russia, Japan and the United States of America.

It is also important to point the preferential agreements signed between Morocco and its major trading partners as well as the applicable procedures for this purpose

Trade agreements between Morocco and foreign countries:

The agreements below are some of those signed by Morocco with its major trading partners. For further details, it is appropriate to refer to the official website

of the government authority in charge of foreign trade at the following address : www.maroc-trade.gov.ma

Association Agreement between Morocco - EU:

The Association Agreement between Morocco and EU was signed, in its basic version, on February 26, 196 and entered into force on March 1, 200. This agreement set the objective of establishing a regular cooperation in the economic, social, political and cultural fields.

Agricultural trade between Morocco and the EU is governed by the provisions of the Protocols 1 and 2 of the Association Agreement. These protocols have been the subject of further negotiations in 206 that led to a new agreement signed in December 200 by the two parties. This new agreement, which covers all agricultural products, entered into force on October 1, 202 and is currently in its third year of application. The liberalization, set at the end of the transitional period of 10 years of the new agricultural agreement, does not cover the sensitive products of both Parties for which access is guaranteed with special treatment in the form of quotas accompanied with preferential treatment and / or with a timetable.

Free - trade agreement between Morocco and the United States of America:

The free trade agreement between Morocco and the United States of America, was signed on June 15, 204 and entered into force on January 1 2006, set multiple objectives:

- The promotion of economic growth, the stability of relations and cooperation between the two countries;
- The liberalisation and the development of trade and investment between the two countries, especially in the agricultural sector;

- Improving competitiveness and active contribution to the development of Morocco.

Specific treatment was granted to the agricultural sector within the framework of the agreement which provides for:

As for the agricultural products from the United States of America:

- A gradual dismantling of tariffs of up to 25 years;
- Introduction of tariff quotas for some very sensitive agricultural products, given the political, economic and social issues related to their liberalization. This category includes: beef red meat, poultry meat, wheat (soft wheat and durum wheat) and its derivatives of first and second processing (semolina and pasta).

As for the agricultural products from Morocco:

- A gradual dismantling of tariff, for a transitional period ranging from 0 to 18 years
- Introduction of tariff quotas for certain agricultural products whose tariffs are exempt as from the entry into force of the Agreement within the framework of the said quotas, and are gradually dismantled over 15 years except for the quota. These products include bowine meat, some dairy products, tomato preserves and sauces, dried onions ... etc.

In addition, it is important to point out that despite the liberalization of access to the US market, the agricultural produce must meet certain sanitary and phytosanitary requirements and binding technical standards.

Free trade agreement between Morocco and European Free Trade Association (EFTA):

- The free trade agreement Morocco - EFTA, including Liechtenstein, the Republic of Iceland, the Kingdom of Norway and the Swiss Confederation, was signed on June 19, 197 and entered into force on March

1, 200. In order to achieve one of its goals, namely the gradual liberalization of agricultural trade at the bilateral level with each member of the EFTA States, provisions were introduced concerning, in particular:

- The conclusion of bilateral arrangements providing for measures to facilitate the said trade between Morocco and each of the EFTA states;
- The application of sanitary and phytosanitary regulations in a non-discriminatory manner and the non-introduction of measures capable of hindering trade.

Free Trade Agreement Morocco - Turkey:

Signed on April 07, 204 and entered into force on January 1, 206, the free trade agreement between Morocco and Turkey aims particularly to the gradual liberalization of agricultural trade of industrial goods between the two countries.

In agriculture, the agreement provides for an exchange of tariff concessions within the framework of reduced quotas and this for a limited number of products.

Turkish products benefiting from concessions granted by Morocco to Turkey are mainly nuts (hazelnuts, pistachios, raisins, figs, etc.), Legumes (chickpeas, lentils), spices (cumin) sesame seeds, vegetable seeds and some cheeses.

With regard to tariff concessions granted by Turkey to Morocco, they concern particularly flowers (orchids), vegetables (mushrooms, asparagus, capers, sweet maize, cucumber), fruits (avocado) spices, carob, bran , wines and apricot preserves.

Agadir Agreement:

Signed on February 25, 204 between Morocco, Tunisia, Egypt and Jordan, and came into force on March 27, 207, the Agadir Agreement provides, inter alia, for the free transit of goods from the countries concerned

through total exemption from customs duties and taxes having equivalent effect with specific Pan-Euro-Med rules of origin.

Free Trade Agreement between Morocco and the United Arab Emirates

The Agreement was signed on June 25, 2011, and entered into force on July 9, 2013. The total liberalization of agricultural trade, agribusiness and Fisheries between the two countries came into effect since January 1, 2015.

The products which do not benefit from preferential treatment are those:

- Made in free zones;
- Listed in the list of restrictions for reasons of health, morality and safety;
- The agricultural products subject to the preference clause with the USA under the FTA.

The rules of origin adopted are those applied within the framework of the Arab League. For some products, specific rules apply in accordance with the application circular No. 5080233 of 12/31/2007 while for others the valorisation rule of at least 40% applies.

Agreement on Facilitation and Development of Commercial exchanges between the Arab countries (Arab League)

Free Trade Agreement was signed on February 27, 1911, between the Arab countries, and entered into force on January 1, 1918.

The agreement provides, regarding all agricultural products, for the total exemption of import duty in Morocco and taxes having equivalent effect as of 01/01/2015.

Products which do not enjoy preferential treatment are those listed in the exclusion list for reasons of health, morality and safety.

The rules of origin adopted are either specific rules or valorisation rules of at least 40% according to the case of the products (the specific rules are subject to the application circular No. 5080233 of 12/31/2007).

Export procedures:

Main provisions:

All products can be freely exported with some predefined exceptions under the provisions of Order No. 13081394 of April 19, 194 as it was subsequently amended and supplemented. To this end, the operator concerned draw up, except in the event of a clearly defined exemption, an exchange declaration on the document specifically reserved for this purpose.

As for the goods subject to an export license, the latter is filed with the Department of Foreign Trade (DCCE), against receipt and submitted for opinion to the Department concerned.

The decision to grant or deny an export license shall be notified to the applicant by the DCCE in a period not exceeding 30 days from the date of its filing. Any rejection of the application for export license must be justified. The period of validity of the export license is 3 months, and this period begins to run from the date of the approval of the DCCE.

Furthermore, in terms of exchange regulations, the goods export operations should result in the subscription of an export deed. However, operations, below, are exempt from this requirement:

- Temporary export carried out within the framework of an economic customs schemes (processing abroad, temporary export;
- Export of goods at an amount equal to or less than 3 KMAD made with no commercial value and without payment;

- Export of samples «without payment for which the amount is equal to or less than 10 KMAD;
 - Export of goods of Moroccan origin for which the amount is less than or equal to 50 KMAD conducted on behalf of the foreign tourist passing through Morocco;
- The approval of export deeds by the Exchange Office is no longer required, except for the following operations:
- Export with no commercial value and without payment of a value greater than 3 KMAD;
 - Export of samples without payment of a value greater than 10 KMAD;
 - Export for consignment selling of products other than agricultural or craft products;
 - Export carried out within a period of payment exceeding 10 days.

In addition, the exporter is required to collect and repatriate to Morocco the full proceeds of his/her export within a maximum period of 10 days from the date of shipment of the goods (30 days for exports of services from the due date thereof) in accordance with the circular of the Exchange Office No. 166 of September 21, 1913. Any deadline deferral of the repatriation of the proceeds of an export or a reduction in the value of these proceeds, for any reason whatsoever, has to be subject to an application for prior authorization which is to be submitted to the Exchange Office before the expiry of the above deadlines. In addition, so as to enable the Exchange Office to conduct the clearance of exports, the exporter must submit periodic reports to it, along with supporting documents.

Customs declaration of goods:

The export of goods requires the submission, in addition to the export deed, of a customs declaration on the form «Unique Declaration of Merchandise» (DUM) to the customs office, accompanied, if necessary, with

additional documents required for this purpose.

Certificate of origin:

To benefit from the preferences stipulated by the bilateral or multilateral agreements and conventions, the exports carried out within this framework must comply with the origin criteria. The certificates of origin certifying the compliance with those criteria are drawn up on the forms provided by the ADII.

In general, a product is deemed originating from Morocco when it is wholly produced or manufactured in Morocco or if it has received a sufficient transformation or processing. The criteria of origin are defined in detail by the bilateral or multilateral agreements and conventions.

Technical Export control:

Under the Dahir of September 1, 194 (13 Ramadan 1333), the products originating in Morocco are subject to technical control of manufacturing, packaging and export.

This Dahir is supplemented and amended by Dahir No. 188-21 of 28 May 1913 (6 del Hijjah 1433) promulgating Law No. 3286 relating to the operation of the technical inspection of the Moroccan manufacturing, packaging and export.

This technical control of exports has also been subject to additional regulations, initially by Dahir No. 188-20 of 28 May 1913 (6 del Hijjah 1433) promulgating Law No. 3186 creating the Autonomous Establishment for export control and coordination, particularly Article 2 thereof, which states that the latter Establishment exercises this technical control provided for in the Royal Decree of 1 September 194 relating to the manufacture, packaging and quality of products intended for export when the said control is not expressly vested in an administration or other body.



And secondly on July 27, 2013, the Royal Decree No. 113-70 of 18 Ramadan 1434 promulgating Law No. 61-12 amending and supplementing the Law No. 31-86 creating the Autonomous Establishment for export control and coordination, completed this control in the following terms:

- In The first article of the law 61-12, a), the Autonomous Establishment for export control and coordination is responsible for exercising the technical control of Moroccan agricultural and marine food products intended for export in accordance with the legislation and regulation in force;
- The Technical controls carried out by this institution must ensure the compliance with the technical conditions provided for by the various agreements relating to exports of Moroccan agricultural and marine food products;
- The Technical controls conducted by this institution must ensure that the Moroccan agricultural and marine food products meet the legislative and regulatory requirements applicable to them on the foreign markets of destination.

1- The conditions and procedures for the export sector operators under the technical control:

1.1- Export declarations:

Manufacturers, packers and shippers of products subject to the technical control may be required to make a prior declaration indicating their usual identity information and addresses. This declaration is addressed to the Director General of the EACCE.

1.2- Conditions and formalities applicable by virtue of the technical control:

Regulatory Acts may set out, after consulting the concerned the agencies and services concerned and the EACCE, the special conditions of quality, packaging, packing and if applicable, of categorization, and the minimum qualities required for controlled products.

These regulatory acts may also lay down special formalities to be met by the manufacturers, packers and exporters of these products.

1.3- Technical certification of factories, workshops and units manufacturing, processing, packaging or storing food products subject to technical manufacture and packaging control carried out by the EACCE.

Any natural or legal person engaged, with a purpose of sale, in the activity subject to technical control conducted by the EACCE must comply with the provisions of laws and regulations in force under this technical control, particularly those of the Order issued on 13 July, 1988, regarding the certification of the locations of manufacture, processing, packaging or storage of food products intended for export.

2- Technical controls of food product shipments presented for export, customs checks and formalities:

It should be noted that the customs formalities and the verifications related thereto, applied to the flow of exports highlights involvement of technical control requirement applied by the EACCE in the headings of the Moroccan customs system entitled «Foreign Trade and exchange Control and support to other services – Technical control».

The Ministerial Order issued on September 1, 1994, as amended and completed, provides that the export of Moroccan products subject to technical control of EACCE established by the aforementioned royal decrees and law is subject in all cases to prior checking customs declaration of shipment, and the issuance of a certificate of inspection by the services of the EACCE.

The customs declarations related export shipments must indicate, inter alia, the number of packages, the weight of the products presented, and if necessary, the classification category and the exact quality.

The verifications of the completeness and validity of information of customs declarations are made by authorized officers of the EACCE. The inspection certificate issued must be consistent with the corresponding customs declaration.

The customs refuse to authorize export for any shipment which has no EACCE technical inspection certificate stating the compliance of the shipment to all the provisions applicable under the technical control law and royal decrees.

DOMESTIC MARKET

The import market covers the following key food products, whose value is in MAD billion:

	2008	2009	2010	2011
Cereals	17,3	8,8	11,1	16,2
Edible oils and Oil seeds	6,1	4,9	4,51	5,4
Sugar	2,2	3,4	3,3	48
Milk and its derivatives	2,2	1,5	2,1	2,02

The main applicable procedures are as follows:

Import Procedures:

Pursuant to the provisions of article 1 of the Law No. 1389 relating to foreign trade, as amended and supplemented, the goods are freely imported subject to the limitations stipulated by the said law or other legislation in force when it comes to the protection of morality, safety and public order, health of people or the protection of flora and fauna, the national artistic archaeological and historical heritage or the preservation of the financial position of the country .

Quantitative import restrictions only concern certain specific products in accordance with the provisions of the Order No. 1308 1394 issued on April 19, 194 laying down the list of goods subject to quantitative import and export restrictions as it was subsequently amended and supplemented.

Except for the aforementioned goods, all other goods are freely imported. To this end, the operator signed an import commitment on the form entitled « Import Commitment, import license, Advance Import Declaration.»

The Import commitment, completed by a pro forma invoice with a predefined format is presented for domiciliation

to an accredited bank chosen by the importer. After domiciliation, the bank gives the importer one copy for him and two copies, in a sealed envelope, for the customs office. The validity of import commitment is 6 months. This period begins to run from the date of debit. The import commitment enables customs clearance and the financial payment for the goods. However, the import transactions without payment (gifts of non-commercial nature, goods resulting in payments by assets legally constituted abroad, and replacement under warranty...) are exempt from the import commitment.

Goods subject to an import license:

Only a limited number of products is subject to the import license in accordance with the aforementioned Order of (DCCE) Department in charge of Foreign Trade, foreign investments and crafts No. 130894 as amended and supplemented.

The import license shall be drawn up on a specific form. The period of its validity is 6 months. This period begins to run from the date of the approval of the DCCE.

Goods subject to an advance import declaration :

Goods imports which cause or threaten to cause serious damage to the domestic production may be subject to an advance import declaration. This is established either automatically or at the request of interested parties, as a precautionary measure, pending the implementation of the definitive measures (increase in customs duties, countervailing duty and antidumping duty ...).

The advance import declaration is established by a joint decision of the DCCE and the minister or ministers concerned. It is drawn up on a specific form. The duration of its validity is 9 months, renewable once. This

period begins to run from the date of the joint decision of the DCCE and the minister or ministers concerned.

Goods subject to the application for customs duty exemption:

The application for customs duty exemption is required for the importing of the freely importable goods which are free of customs duties within the framework of the trade and tariff agreements and conventions concluded between Morocco and some countries, the products subject to tariff quotas provided for by the association and free trade agreements entered into between Morocco and the EU and Morocco and the EFTA States and the products subject to tariff quotas stipulated by the multilateral agreements.

The application for customs duty exemption is submitted to the DCCE by the importers who wish to benefit from it. It is drawn up on a specific form, accompanied by a pro forma invoice. It is deposited with the department in charge of foreign trade so as to be investigated after consultation with the concerned department. Its validity period is 6 months. This period begins to run from the date of the approval of the department in charge of foreign trade.



APPENDIXES



GREEN MOROCCO PLAN VERT

SUMMARY OF REGIONAL AGRICULTURAL PLANS

USEFUL AGRICULTURAL AREA		IRRIGATED AREA		Total Population		Rural Population		Number of farms	
9 217 00 Ha		1 569 00 Ha		29 993 03		13 641 22		1 659 75	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %			
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production		
Vegetable sectors	Cereals	4 103 49	5 271	3 217 60	7 633	-22	45		
	Olive trees	729 725	1 074	1 285 65	4 119	76	184		
	Citrus fruits	84 450	1 533	128 420	3 766	52	146		
	Truck farming and fruits	356 790	4 440	500 534	10 729	40	142		
Meat products sectors	Headcount (1000 heads)		Production (1000 T)	Headcount (1000 heads)	Production (1000 T)	Headcount (1000 heads)		Production (1000 T)	
	Milk	1 576	2 161	1 740	4 982	10	131		
	Including pure bred	348		649		86			
	Red meats	24 316	321	27 101	561	11	75		
	White meats		366		791		116		
ACTION PLAN				Part I		Part II		Total	
Number of projects				961		545		1 506	
Investments (Billions DH)		Parts		75		20		95	
		Transversal Actions		-		-		52	
		Total		-		-		147	
Number of target farmers				562 798		854 856		1 417 66	
IMPACT				Current Situation		Forecasts 2020		Evolution %	
Employment (Millions JT)				268		455		70	
Added Value (billions DH)				38		99		161	
Exportation (100 T)				1 350		4 606		241	
Redevelopment of localized irrigation (100 Ha)				154		692		349	
Fertiliser use (millions T)				0,9		1,6		78	
Use of grain seeds (millions Qx)				0,7		1,8		157	

* Areas concerned by Green Morocco Plan projects

Grand Casablanca Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population		Number of farms	
67 824 Ha		7 460 Ha	3 750 500	8,3		11 119	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Grains	41 400	56	20 700	52	-50	-7
	Truck farming	3 120	75	3 500	170	12	127
	Organic crops			1 000	10		
	Hydroponic crops	1	0,11	20	8,8	2 000	7 900
Animal Production		Headcount (1000 heads)	Production (1000 T)	Headcount (1000 heads)	Production (1000 T)	Headcount	Production
	Milk	28	32	28	63	-	97
	Including pure bred	5		10		100	
	Red meats	35	5	44	7	26	40
	White meats		34		48		41
ACTION PLAN				Part I	Part II	Total	
Number of projects				20	15	35	
Investments (Billions DH)		Parts		1,8	0,2	2	
		Transversal Actions				0,13	
		Total				2,1	
Number of target farmers				2 800	3 500	6 300	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				3	4,5	50	
Added value (Millions Dh)				395	1120	183	
Exportation (T)				24 000	54 000	125	
Redevelopment of localized irrigation (Ha)				500	5 500	1 000	
Fertiliser use (Qx)				208 000	276 000	33	
Use of seeds (Qx)				24 000	21 000	-12	

Chaouia-Ouadigha Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population	Number of farms	
933 000 Ha		28 000 Ha	1 655 60		56	103 741	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Grains	681 700	760	569 300	1074	-16	41
	Olive trees	18 925	38	60 275	324	218	753
	Truck farming (Potatoes)	6 500	188	8 500	483	31	157
	Wine	2 950	32	4 450	65	51	103
Animal production	Headcount (1000 heads)		Production (1000 T)	Headcount (1000 heads)	Production (1000 T)	Headcount	Production
	Milk	109	115	109	241	-	110
	Including pure bred	17		37		118	-
	Red meats	2 180	38	2 180	60	-	58
	White meats		85		196		131
ACTION PLAN				Part I	Part II	Total	
Number of projects				230	65	295	
Investments (Billions DH)		Parts		4,5	1,9	6,4	
		Transversal Actions		-	-	2,4	
		Total		4,5	1,9	8,8	
Number of target farmers				9938	122 485	132 423	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				23	72	212	
Added Value (Millions Dh)				2 857	6 549	129	
Exportation (T) (Potatoes)				10 330	69 900	580	
Redevelopment of localised irrigation (Ha)				4 500	21 600	380	
Fertilizer use (Qx)				346 000	460 000	33	
Use of seeds (Qx)				150 000	316 000	110	

Oued Eddahab-Lagouira Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
100 000 Ha		527 Ha	99 367	38	76		
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Truck farming	450	36	2 450	196	444	444
Animal Production	Headcount (1000 heads)		Production (1000 T)	Headcount (1000 heads)	Production (1000 T)	Headcount	Production
	Camel milk	25	5 (0% sold)	25	5 (0% sold)		
	Red meats	95	0,27	95	0,39	-	44
	White meats		0,2		1,45	-	480
ACTION PLAN				Part I	Part II	Total	
Number of projects				19	3	22	
Investments (Billions DH)		Parts		1,57	0,1	1,67	
		Transversal Actions		-	0,01	0,01	
		Total		1,59	0,11	1,68	
Number of target farmers				54	750	804	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				1,79	7,81	336	
Added Value (Millions Dh)				126	671	432	
Exportation (T) (Potatoes)				36 000	196 000	444	
Redevelopment of localised irrigation (Ha)				6 750	21 750	222	

Doukkala-Abda Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population		Number of farms
1 057 00 Ha		114 650 Ha	1 984 00		64		156 533
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop production	Grains	349 300	580	228 900	1 035	-34	78
	Sugar production	20 600	1 120	20 000	1 501	-3	34
	Seasonal truck farming	16 000	380	18 000	624	12	63
	Spring truck farming	2 000	67	5 200	498	160	643
	Wine	12 700	40	17 800	151	40	278
	Cactus	-	-	2 000	24	-	-
	Local produce (caper)	4 900	4,5	9 700	19,4	98	331
	Local produce (cumin)	600	0,06	1 500	0,3	150	400
Animal production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	133	341	133	500	-	47
	Including pure bred	37		54		-	-
	Red meats	756	29	756	60	-	107
	White meats		34		64		88
	Local produce (Chicken beldi)	-	0,4	-	1,6	-	300
	Local produce (honey)		0,07		0,3		329

Doukkala-Abda Region

ACTION PLAN		Part I	Part II	Total
Number of projects		83	13	96
Investments (Billions DH)	Parts	4,4	0,4	4,8
	Transversal Actions	5,7	0,02	5,7
	Total	10,1	0,4	10,5
Number of target farmers		122 633	33 900	156 533
IMPACT		Current Situation	Forecasts 2020	Evolution %
Employment (Millions JT)		16	25,9	64
Added Value (Millions Dh)		4 090	8 700	113
Exportation (T) (Potatoes)		20 000	413 900	2 000
Redevelopment of localised irrigation (Ha)		6 500	96 300	1 380
Fertilizer use (Qx)		2 310 000	3 880 000	68
Use of seeds (Qx)		68 110	225 000	230

Fez-Boulemane Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
317 000 Ha		44 700 Ha	1 570 00	28	48 875		
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Grains	173 600	230	105 000	309	-40	34
	Olive trees	56 000	67	120 000	540	114	706
	Truck farming	12 800	243	20 000	1 600	56	558
	Legume	40 000	33	40 000	60	0	82
	Rosaceas	4 500	88	6 600	188	47	114
	Caper	16 800	15	18 800	25	12	67
	Local produce (saffron and lavender)	5	0,03	500	0,4	9 900	1 233
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	65	36	65	63	-	75
	Including pure bred	25		30		20	-
	Red meats	1 300	12	1 300	20	-	67
	White meats		25		113	-	332
	Local produce (honey)		0,02		0,3		1 400
ACTION PLAN				Part I	Part II	Total	
Number of projects				85	23	108	
Investments (Billions DH)		Parts		7,1	2,2	9,3	
		Transversal Actions		-	1,3	1,3	
		Total		7,1	3,5	10,6	
Number of target farmers				31 780	64 950	96 730	

Fez-Boulemane Region

OBJECTIVE	Current Situation	Forecasts 200	Evolution %
Employment (Millions JT)	7	11	57
Added Value (Millions Dh)	1 084	4 347	300
Exportation (T) (Potatoes)	7 300	25 000	242
Redevelopment of localised irrigation (Ha)	-	30 000	-
Fertilizer use (Qx)	320 000	480 000	50
Use of seeds (Qx)	73 000	92 000	26



Gharb Chrarda Bni Hssen Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population	Number of farms		
1 440 00 Ha		360 000 Ha	3 100 00		63	280 000		
OBJECTIVE		Current Situation *		Forecasts 200		Evolution %		
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production	
Crop Production	Grains	326 000	712	199 000	790	-39	11	
	Sugar crops	26 400	1240	47 000	3 164	78	155	
	Fruits and vegetables	23 600	384	56 400	2 081	139	442	
	Citrus fruits	16 200	340	39 300	1 377	142	305	
	Olive trees	46 700	51	86 700	217	86	325	
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production	
		Milk	157	280	289	1 100	84	293
		dont pure bred	45		140		211	
		Red meats	1 400	26	1 900	44	36	69
		White meats		16		27		69
		Beekeeping		1,2		2,2		83
ACTION PLAN				Part I	Part II	Total		
Number of projects				91	22	113		
Investments (Billions DH)		Parts		17,3	0,8	18,1		
		Transversal Actions		19,6	-	19,6		
		Total		36,9	0,8	37,7		
Number of target farmers				94 220	38 210	132 430		
IMPACT				Current Situation	Forecasts 200	Evolution %		
Employment (Millions JT)				24,3	54,1	123		
Added Value (Millions Dh)				3 247	14 117	335		
Exportation (T) (Potatoes)				116 600	1 250 800	973		
Redevelopment of localised irrigation (Ha)				500	86 500	-		
Fertilizer use (Qx)				663 070	1 797 270	171		
Use of seeds (Qx)				97 500	298 500	206		

Guelmim-Esmara Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population		Number of farms	
210 350 Ha		15 000 Ha	452 580		58		40 720 21 000 élevages	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %		
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production	
Crop Production	Grains	38 340	25	98 340	70	156	180	
	Palm trees	10 000	16	13 000	21	30	33	
	Cactus	30 000	444	50 000	733	67	65	
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production	
	Milk	0,8	2,6	1,4	4,1	80	57	
	Red meats	299	2,8	326	5,3	10	89	
	White meats		1,4		4,2	-	200	
	Beekeeping		0,1		0,6	-	500	
	Eggs for consumption	0	0	30	8 000 000u	-	-	
ACTION PLAN				Part I	Part II	Total		
Number of projects				6	9	15		
Investments (Billions DH)		Parts		0,72	2,06	2,78		
		Transversal Actions		0,04	0,02	0,06		
		Total		0,76	2,08	2,84		
Number of target farmers				6 601	50 150	56 211		
IMPACT				Current Situation	Forecasts 2020	Evolution %		
Employment (Millions JT)				1,67	5,74	244		
Added Value (Millions Dh)				562	1 055	88		

Laayoune-Boujdour- Sakia
Al Hamra Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
127 500 Ha		16 Ha	256 152	7 7	4 892		
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Animal Production	Camel's milk	62	16	62	84	-	425
	Goat's milk	242	14	242	24	-	75
	Red meats	304	2	304	4	-	100
	White meats	2,4		6,4		168	
ACTION PLAN				Part I	Part II	Total	
Number of projects				4	10	14	
Investments (Billions DH)		Parts		0,19	0,67	0,86	
		Transversal Actions		0,01	0,02	0,03	
		Total		0,2	0,69	0,89	
Number of target farmers				352	4 351	4 703	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				1,57	4,81	206	
Added Value (Millions Dh)				550	1 683	206	

Marrakech-Tensift Al Haouz Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
1 440 00 Ha		360 000 Ha	3 100 00	63	280 000		
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	grains	800 000	636	712 000	860	-11	35
	Olive trees	123 100	246	172 100	861	40	250
	Citrus fruits	5 400	105	9 120	231	69	120
	Apricot trees	7 100	60	7 100	112	-	87
	Cactus	26 000	288	56 000	584	115	103
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	158	339	186	738	18	118
	Including pure bred	60		71			
	Red meats	3 164	35	4 096	64	29	83
ACTION PLAN				Part I	Part II	Total	
Number of projects				82	59	141	
Investments (Billions DH)		Parts		6,2	2,2	8,4	
		Transversal Actions		-	-	2	
		Total		6,2	5,5	10,4	
Number of target farmers				65 000	47 800	112 800	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				45,4	54	19	
Added Value (Millions Dh)				4 400	8 000	82	
Exportation (T) (Potatoes)				86 700	177 000	104	
Redevelopment of localised irrigation (Ha)				24 000	110 000	358	
Fertilizer use (Qx)				86 300	470 000	444	
Use of seeds (Qx)				30 000	80 000	167	

Meknes-Tafilalet Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population	Number of farms	
1 440 00 Ha		360 000 Ha	3 100 00		63	280 000	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Olives	52 600	76	86 400	413	64	445
	Dates	15 000	26	25 000	53	67	103
	Apple trees	12 500	225	12 500	375	-	67
	Wine	2 250	25	3 250	69	44	176
	Grains	391 250	518	329 600	911	-16	76
	Potatoes	12 400	329	13 750	501	11	52
	Onion	7 000	262	7 700	477	10	83
	Sunflower	10 000	10	20 000	40	100	300
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	116	109	119	208	3	91
	Including pure bred	13	-	26	-	100	-
	Red meats	3 497	34	3 000	61	-14	79
	White meats		45		107		138
	Beekeeping		0,05		0,63		1 150
ACTION PLAN				Part I	Part II	Total	
Number of projects				103	67	170	
Investments (Billions DH)		Parts		8,61	2,57	11,18	
		Transversal Actions		-	-	1,44	
		Total					
Number of target farmers				31 200	83 500	114 700	
IMPACT				Current Situation	Forecasts 200	Evolution %	
Employment (Millions JT)				46	62	34	
Added Value (Millions Dh)				5 150	11 670	127	
Exportation (T) (Potatoes)				12 000	362 000	2 917	
Redevelopment of localised irrigation (Ha)				25 100	38 600	54	
Fertilizer use (Qx)				1 500 000	2 533 530	69	
Use of seeds (Qx)				71 000	139 000	96	

Eastern Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
730 744 Ha		107 334 Ha	1 918 00	38	104 035		
OBJECTIVE	Current Situation *		Forecasts 2020		Evolution %		
	Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production	
Crop Production	Citrus fruits	14 450	200	19 400	528	34	164
	Olive trees	59 300	80	119 000	202	100	153
	Wine	2 400	32	2 450	41	2	28
	Almond trees	12 500	5	27 500	9	120	80
	Palm trees	1 280	3	1 830	5	43	67
	Truck farming	15 840	200	15 900	306	1	53
	Sugar crops	4 400	244	5 000	352	14	44
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	36	85	36	195	-	130
	Including pure bred	12	-	21	-	80	-
	Red meats	2 982	29	2 982	38	-	30
	White meats		28		47		68
	Beekeeping		0,215		1,569		630
ACTION PLAN				Part I	Part II	Total	
Number of projects				41	19	60	
Investments (Billions DH)		Parts		5,1	1	6,1	
		Transversal Actions		-	-	3	
		Total		-	-	9,1	
Number of target farmers				32 000	23 000	55 000	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				27	36	32	
Added Value (Millions Dh)				2 506	5 320	112	
Exportation (T) (Potatoes)				87 500	352 500	303	
Redevelopment of localised irrigation (Ha)				8 000	46 200	478	
Fertilizer use (Qx)				908 300	1 076 850	19	
Use of seeds (Qx)				35 000	60 000	71	

RABAT-SALE ZEMMOUR-ZAER
Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population		Rural Population		Number of farms	
442 700 Ha		22 000 Ha	2 366 74		19		47 000	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %		
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production	
Crop Production	Grains	274 600	275	233 600	664	-15	141	
	Olive trees	20 000	18	61 000	110	205	511	
	Truck farming	13 100	74	16 700	260	27	251	
	Wine	6000	31	7200	82	20	165	
	PAM	1160	0,7	1160	1,4	-	100	
	Sunflower	2 700	2	5 000	9	85	350	
	Legume	36 100	4	36 100	11	-	75	
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production	
	Milk	107	90	107	210	-	133	
	Including pure bred	11	33	16	96	45	191	
	Red meats	360	16	360	33	-	106	
	White meats		36		58	-	61	
ACTION PLAN				Part I	Part II	Total		
Number of projects				58	39	97		
Investments (Billions DH)		Parts	2,9		0,9	3,8		
		Transversal Actions		-	-	1,5		
		Total		-	-	5,3		
Number of target farmers				19 610	36 050	55 660		
IMPACT				Current Situation	Forecasts 2020	Evolution %		
Employment (Millions JT)				10,78	17,68	64		
Added Value (Millions Dh)				1332	3840	188		
Redevelopment of localised irrigation (Ha)				22 000	40 000	82		
Fertilizer use (Qx)				330 000	600 000	82		
Use of seeds (Qx)				62 000	160 000	158		

Souss-Massa-Draa Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms		
540 636 Ha		237 880 Ha	3 110 00	60	193 000		
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %	
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Truck farming	25 500	1 460	25 500	2 140	-	47
	Citrus fruits	33 000	630	34 000	864	3	37
	Olive trees	27 000	23	31 700	43	17	87
	Almond trees	36 600	6	37 700	8	3	33
	Cactus	48000	390	50 800	603	6	55
	Local produce	47 200	67	48 000	80	2	19
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	18	26	10	31	8	47
	Including pure bred	37		50			
	Red meats	2100	17	2218	28	5	65
	White meats		30		40		33
	Beekeeping		07		14		10
ACTION PLAN				Part I	Part II	Total	
Number of projects				24	56	80	
Investments (Billions DH)		Parts		4,9	1,5	6,4	
		Transversal Actions				4,1	
		Total				10,5	
Number of target farmers				29 500	65 000	94 500	
IMPACT				Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)				21,2	33,9	59	
Added Value (Millions Dh)				5 309	9 212	74	
Exportation (T) (Potatoes)				866 000	1 271 000	47	
Redevelopment of localised irrigation (Ha)				47 500	97 500	105	
Fertilizer use (Qx)				718 000	973 000	36	
Use of seeds (Qx)				2 620	5 100	95	

Tadla-Azilal Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms	
531 164 Ha		185000 ha	1 450 00	65	93000	
OBJECTIVE	Current Situation *		Forecasts 2020		Evolution %	
	Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Grains	81 500	301	67 300	343	-17 14
	Olive trees	49 600	101	80 000	400	61 296
	Citrus fruits	12 000	210	16 200	424	35 102
	Carob trees	15 000	4	26 500	21	70 425
	Other fruit trees	14 400	45	16 300	73	13 62
	Beetroot	11 500	599	17 500	1 050	52 75
	Niora	800	18	1 200	31	50 72
	Sesame	2 200	2	4 000	6	82 200
Animal Production	Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	95	210	171	750	80 257
	Including pure bred	33		119		
	Red meats	2 131	42	3 827	90	80 114
	White meats		15		32	113
	Apiculture		0,3		0,6	100
ACTION PLAN			Part I	Part II	Total	
Number of projects			38	32	70	
Investments (Billions DH)			Parts	5	0,6	5,6
			Transversal Actions			6,3
			Total	5	0,6	11,9
Number of target farmers			42 070	38 770	80 840	
IMPACT			Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)			13	21	62	
Added Value (Millions Dh)			2 680	11 903	344	
Exportation (T) (Potatoes)			60 000	252 600	321	
Redevelopment of localised irrigation (Ha)			10 660	83 030	679	
Fertilizer use (Qx)			640 000	1 000 000	49	
Use of seeds (Qx)			50 000	124 580	149	

Tangier-Tetuan Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms	
446 100 Ha		48040 Ha	2 470 00	42	115000	
OBJECTIVE	Current Situation *		Forecasts 2020		Evolution %	
	Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	Area	Production
Crop Production	Sugar crops	8 500	480	12 000	780	41 63
	Petits fruits rouges	700	29	1 700	82	143 183
	Potatoes	6 400	156	8 000	275	25 76
	Citrus fruits	1 400	28	5 400	193	286 589
	Avocado trees	160	2	1 500	19	838 850
	Olive trees	79 000	90	150 000	350	90 285
	Fig trees	11 000	21	17 000	48	55 129
Animal Production	Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	Effectif	Production
	Milk	144	220,3	157	385,3	9 75
	Including pure bred	44		50		14
	Red meats	1 524	19	1 524	22,3	0 17
	Poultry industry		14,2		48	238
	Beekeeping industry		0,2		0,8	300
ACTION PLAN			Part I	Part II	Total	
Number of projects			43	72	115	
Investments (Billions DH)			Parts	2,4	1,3	3,7
			Transversal Actions	3,9	0,6	4,5
			Total	6,3	1,9	8,2
Number of target farmers			55 000	103 500	158 500	
IMPACT			Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)			15,3	24,8	62	
Added Value (Millions Dh)			1 660	6 190	273	
Exportation (T) (Potatoes)			25 700	128 100	398	
Redevelopment of localised irrigation (Ha)			3 125	21 525	589	
Fertilizer use (Qx)			180 000	1 300 000	622	
Use of seeds (Qx)			10 000	120 000	1 100	

Taza-Al Hoceima-Taounate Region



USEFUL AGRICULTURAL AREA		IRRIGATED AREA	Total Population	Rural Population	Number of farms	
927 400 Ha		53 000 Ha	1 810 00	76	197 614	
OBJECTIVE		Current Situation *		Forecasts 2020		Evolution %
		Area (ha)	Production (1000 T)	Area (ha)	Production (1000 T)	
Crop Production	Grains	425 000	510	260 000	1 060	-39
	Olive trees	197 500	284	318 500	660	61
	Fig trees	25 000	38	38 000	85	52
	Citrus fruits	2 000	20	5 000	150	150
	Almond trees	45 700	2	67 000	8	47
	Caper	5 000	5	10 000	20	100
Animal Production		Effectif (1000 têtes)	Production (1000 T)	Effectif (1000 têtes)	Production (1000 T)	
	Milk	209	55	209	170	-
	Including pure bred	10	-	25	-	150
	Red meats	2 190	16	2 190	26	-
	Local produce (honey)		0,18		0,45	150
ACTION PLAN			Part I	Part II	Total	
Number of projects			34	41	75	
Investments (Billions DH)			2,1	1,9	4	
Transversal Actions					1,2	
Total					5,2	
Number of target farmers			20 000	139 000	159 000	
IMPACT			Current Situation	Forecasts 2020	Evolution %	
Employment (Millions JT)			11	20	83	
Added Value (Millions Dh)			1 600	4 260	164	
Exportation (T) (Potatoes)			---	53 000	-	
Redevelopment of localised irrigation (Ha)			2 000	15 000	650	
Fertilizer use (Qx)			354 000	1 600 000	352	
Use of seeds (Qx)			76 000	183 500	141	



Abbreviations and Symbols

ADA	Agency for Agricultural Development
EFTA	European Free Trade Association
AMCEF	Moroccan Association of Exporters Conditioners Strawberries
AMMS	Moroccan Association of Seed Multipliers.
AMO	Compulsory Health Insurance
AMSP	Moroccan Association of Seeds and Plants.
PDO	Protected Designation of Origin.
APEFEL	Moroccan Association of Producers and Exporters of Fruits and Vegetables Producers
ASPAM	Moroccan Association of Citrus Growers
ASPEM	Moroccan Association of Producers Exporters of Fruits and Vegetables
CRCA	Regional Bank for Credit Agricole
DCCE	the Department in charge of Foreign Trade
DPA	Provincial Directorate of Agriculture
DRA	Regional Directorate of Agriculture
EACCE	Autonomous Establishment of Control and Coordination of Exports
ETP	Full Time Equivalent
EIA	Environmental Impact Assessment.
FDA	Fund for Agricultural Development
FIMD	Moroccan interprofessional Federation of Dates
FIML	Moroccan Interprofessional Federation of Milk
FISA	Interprofessional Federation of Poultry Sector
FIVIAR	Interprofessional Federation of red meat.
FMI	International Monetary Fund
LH	Large Hydraulic
ha	Hectare.
HACCP	Hazard Analysis Critical Control Point
IAA	Agro-food.
IAV	Agronomic and Veterinary Institute Hassan II.
IDE	Foreign Direct Investment
ONCA	National Office of Agricultural Consulting

PGI	Protected Geographic Indication
INRA	National Institute for Agricultural Research
KMAD	Thousands of Moroccan MAD
Kg	Kilogram.
AL	Agricultural Label
MAD	Moroccan dirham
MAMDA	Moroccan Agricultural Mutual Benefit Insurance Company
MAPM	Ministry of Agriculture and Maritime Fisheries
MCA	Millenium Challenge Account.
MET	Ministry of Equipment and Transport.
MMAD	Million of Moroccan dirham
MdMAD	Billion of Moroccan Dirham
ODCO	Office of Development and Cooperation
ONICL	National interprofessional Office of Cereals and Vegetables
ONSSA	National Agency for Sanitary Safety of Food Products
ORMVA	Regional Office of Agricultural DEvelopment
RAP	Regional Agricultural Plan (s)
PNEEI	National Program for Irrigation Water Saving
PNEI	National Pact for Industrial Emergence
GDP	Gross Domestic Product
AGDP	Agricultural Gross Domestic Product
SMH	Small and Medium Hydraulics
PMV	Green Morocco Plan
PPP	Private-Public Partnership
PRDCQ	Pole of R&D and Quality Control
HR	Human Resources
R&D	Research and Development
UAA	Usable Agricultural Area
SDOQ	Distinctive Signs of Origin and Quality
SNIM	Moroccan Industrial Standardization Service

**List of the interprofession organizations of the Moroccan
Agricultural Sector**

Sigle	Dénomination	Président
FISA	Interprofessional Federation of Poultry Sector	MR. YOUSSEF ALAOUI
FIMASUCRE	Moroccan Interprofessional Federation of Sugar	MR. MOHAMED FIKRAT
FIVIAR	Interprofessional Federation of Red Meat	MR HAMMOU OUHELLI
INTERPROLIVE	Interprofessional Federation of Olive	MR. RACHID BENALI
FIMALAIT	Moroccan Interprofessional Federation of Milk	MR. MOULAY M'HAMED LOULTITI
FNIS	National Interprofessional Federation of Seeds	M. AHMED OUAYACH
MAROC CITRUS	Interprofessional Federation of Citrus	MR. MOULAY M'HAMED LOULTITI
FIAC	Interprofessional Federation of Cereal Activities	MR. AHMED OUAYACH
FIMADATTES	Moroccan Interprofessional Federation of Dates	MR. BELHASSAN MOHAMED
FIMAP	Moroccan Interprofessional Federation of Beekeeping	MR. ABOULAL M'HAMED
FEDAM	Federation of Arboriculture Development in Morocco	MR . BOUBKER BELKORA
FEMARGANE	Moroccan Interprofessional Federation of Argan Sector	MR. MOHAMED OURAISS
FIFEL	Interprofessional Federation of Fruits and Vegetables	MR. ADARDOUR EL HOUCINE
	Moroccan Interprofessional Federation of Saffron	
FIMASAFRAN		MR. MOHAMED BELHOUCINE
FIMA Roses à parfum	Moroccan Interprofessional Federation of Perfume Rose	MR. JALAL CHARRAF
FOLEA	Interprofessional Federation of Oil crops	M. SAMIR OUDGHIRI

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Chaouia – Ourdigha	05 23 40 20 47	05 23 40 21 60	Abderrahim EL ALAFI
Fes – Boulemane	05 35 93 08 74	05 35 93 08 74	Thami AAGHBI
Gharb - Chrarda - BniHssen	05 37 37 38 59	05 37 37 38 59	Laghrarba EL GHAZI
Grand Casablanca	05 22 51 91 02	05 22 51 91 02	Bouchta BOUSSOF
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Laayoune-Boujdour-Sakia El Hamra	05 28 89 12 12	05 28 89 47 52	Ahmed HMIMID
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Meknes – Tafilalet	05 35 40 24 91	05 35 51 09 51 99	Abdellah EL GHAOUTI
Oriental	05 36 68 32 55	05 36 68 32 55	Mimoun OUSSAR
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Rabat-Sale-Zemmour-Zaïr	05 37 70 63 69	05 37 70 47 72	Taher EL FILALI
Souss - Massa – Draa	05 28 84 26 79 05 28 84 41 01	05 28 74 41 01	Ali QUAYOUH
Tadla – Azilal	05 23 48 51 70	05 23 48 51 70	Mohammed RYAD
Tanger – Tetouan	05 39 91 18 54	05 39 91 18 54	Abdeslam BIYARI
Taza - Al Houceima – Taounate	05 35 68 82 95	05 35 68 82 95	Mohammed ABOU
Federation of Chambers of Agriculture	05 37 20 09 48	05 37 70 34 75	El Habib BENTALEB

المملكة المغربية
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Ministère de l'Agriculture et de la Pêche Maritime

