

INVESTOR'S GUIDE IN THE AGRICULTURAL SECTOR IN MOROCCO

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المملكة المغربية
Royaume du Maroc



وزارة الفلاحة والصيد البحري

والتنمية الفلاحية والبياه والغابات

Ministère de l'Agriculture, de la Pêche Maritime,
du Développement Rural et des Eaux et Forêts



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 declined them in action plans and program contracts : **Tourism (VISION 2020), Commerce (RAWAJ PLAN) New Information and Communication Technologies (DIGITAL MOROCCO PLAN), Energy (NATIONAL ENERGY EFFICIENCY PROGRAM), Industry (EMERGENCE PLAN 2020), 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 710,850 square kilometres, Morocco opens onto both the Atlantic to the west, with 2934 km of coastline, and the Mediterranean Sea to the north with 512 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	Royaume du Maroc
CAPITAL	Rabat
LOCATION	Afrique du nord, à 14 km de l'Europe
POLITICAL SYSTEM	Monarchie constitutionnelle démocratique, parlementaire et sociale
HEAD OF STATE	Sa Majesté le Roi Mohammed VI (20 ^{ème} Roi de la dynastie Alaouite)
CURRENCY	Le dirham marocain (MAD)
AVERAGE EXCHANGE RATE IN FEBRUARY 2018	EUR 1 = MAD 11,343 USD 1 = MAD 9,193
MACRO-ECONOMIC DATA IN 2014	<ul style="list-style-type: none">GDP : MAD 1,016.1 billionDistribution of GDP by sector of activity : Primary sector : 13%, secondary sector : 30% and tertiary sector : 57%GDP Growth : 4,4% (in 2017)Gross National disposable Income : MAD 1,077 billionInflation rate : 1,6%Imports of goods and services : MAD 224 billionInvestment rate (GFCF(*)/GDP) : 33,1%National Savings Rate : 28,8%
DEMOGRAPHIC DATA (FORECASTS)	<ul style="list-style-type: none">Population (2017) : 34 996 167 InhabitantsWorking population (2017) : 47,5%Urban population (2017) : 61,9%Life expectancy (2014) : 74 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, its 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 and job creation, particularly in rural areas where agriculture is the main employer and source of income for 1.5 million farmers.

The food industry is one of the pillars of the economy with a production value of 110 billion dirhams. It is the first sector of the domestic industry and one of the best development assets 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 : 13 % to 20 %**

A major reservoir of employment : **40% of jobs and income source for 74,5% of rural population**

Foreign exchange earnings through exports : **1.8 billion euro** representing **11%** of the **total value**

Balanced coverage of the requirements of food products : **100% for milk and meat, 100% for vegetable products, 60% for cereals, 43% for sugar...**

- A considerable Usable Agricultural Area : **8.7 million** hectares of which **1.6 million** hectares **irrigated**.
- A major hydro-agricultural infrastructure : **139 dams** allowing mobilization of **15.2 billion M³** of water of which **13.3 billion M³** for agricultural use.
- A diversified agricultural production : **1 Million hectares of olive, more than 250 000 ha of vegetable crops, 125 000 ha of citrus fruits, 28 million heads of which 66% 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 1962, 1970, 1972, 1992, 1996 and 2011. 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 2000s 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 2005, 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 1996 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 national 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.

INDUSTRIAL ACCELERATION PLAN (PAI)

The industrial strategy assigns to the sector the following general objectives, by 2020 :

- Creation of half a million jobs, half of which comes from foreign direct investment and half from the renovated national industrial fabric;
- Increasing of the industrial share of GDP by 9 points, from 14% to 23% in 2020.

To achieve these goals, the new strategy is divided into 10 key measures grouped into 3 classes:

1. Industrial ecosystems for a more integrated industry :

This project is based on the establishment of industrial ecosystems designed to create a new dynamic and a new relationship between large groups and SMEs.

This ecosystem logic is also aimed at optimizing the social and economic benefits of public procurement through industrial compensation (offset), which accounts for 20% of GDP.

As part of the implementation of these ecosystems, special attention is paid to linking formal with informal processes through the establishment of a comprehensive system integrated with "very small businesses" (TPE) including the creation of the self-entrepreneur status, a modified tax section, as well as social security, support and dedicated funding.

To achieve this purpose, two levers will be established: a skilled human resources data bank and an inter-contracts pool.

2. Support tools adapted to the industrial fabric :

The PAI provides for a series of integrated measures to ensure support tailored to the needs of companies and provide them with a favourable framework for the development of their activities. In terms of financing, a public industrial investment fund (the Industrial Development Fund -FDI), with a budget of 20 billion dirhams, will allow the industrial fabric to consolidate, modernize and develop its capacity substitute for imported products.

Along with State support, the banking sector is also participating in the launching of the new strategy. An integrated and competitive financing offer is implemented, under a partnership agreement between the state and the banking sector, that is committed to supporting industrial companies (competitive rates, support for restructuring and internationalization, etc.).

Regarding the preparation of industrial land, 1000 hectares will be made available for industrial rental parks with turnkey premises. These industrial parks come in addition to the existing supply of industrial zones and integrated industrial centres (P2I).

A training offer adapted to the industry's needs is established under the Industrial Acceleration Plan (PAI) to ensure that the offer matches the needs of companies. Direct aids for training are also allocated as part of the new strategy.

3. A stronger international positioning :

The third block of measures aims at improving Morocco's international positioning. Regarding the country's situation in foreign markets, the efforts will be concentrated on sectors with a high export potential with the aim of improving the competitiveness of the kingdom's exportable supply.

In parallel, the strategy plans to promote foreign investment by establishing a culture of "deal-making" to open Morocco to the opportunities of the changing international market.

RAWAJ-VISION 2020 PLAN FOR THE DOMESTIC TRADE

The Rawaj-Vision 2020 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 2020 to bring the contribution of domestic trade to national GDP to 15%, against 11% for 2006 and create over 450 000 jobs. Its implementation is classified in three specific axes :

- 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.

NATIONAL PLAN FOR THE DEVELOPMENT OF TRADE EXCHANGES

The national plan for the development of trade exchanges is structured around 3 axes, divided into 20 projects and 40 measures :

1st axis : advocates the valorization, development and promotion of exports as the main solution to reduce the trade deficit, in particular through :

- The definition of a shared and inclusive vision for the development of foreign trade, in harmony with the different sectoral strategies ;
- Increasing the effectiveness of accompanying measures for exporting companies ;
- Streamlining and improving the benefits of the export promotion system ;

- Anticipating social and environmental economic developments and strengthening the exploration of existing business opportunities ;
- The opening of new markets through the negotiation of trade agreements.

2nd axis : aims at the regulation of imports and the facilitation of procedures related to foreign trade, particularly through :

- Regulation of imports by strengthening customs control and combating smuggling ;
- The organization of the profession of the foreign trade operator ;
- Accelerating the dematerialisation of foreign trade documents ;
- Improving the efficiency of the trade defense system.

3rd axis : focuses on the development of the local added value of the national product, and aims to achieve the following projects :

- Promotion and support of economic integration ;
- Implementation of existing industrial compensation agreements and the development of new offset projects for large public investments.

NATIONAL ENERGY STRATEGY

The national energy strategy for 2030 is based on 7 strategic orientations, namely :

- S1. An optimized electric mix around reliable and competitive technological choices
- S2. Rising share of renewable energies
- S3. Energy efficiency established as a national priority
- S4. Mobilization of national resources
- S5. Regional integration
- S6. The balance between domestic production and energy imports
- S7. Implementing a national compact for sustainable development

The strategy provides for a number of accompanying measures :

- M1. The Energy Development Fund
- M2. Organization and governance of the sector
- M3. Communication aimed at mobilizing all citizens
- M4. Promotion of training to support the strategy
- M5. Establishment of a governance and a code of regulation
- M6. Incentive framework for private investment: financing
- M7. The observatory of energy.

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 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 : A sector equipped and organized for an optimal quality, from landing to marketing, through :

- Development of infrastructure and landing 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.

NATIONAL HANDICRAFT STRATEGY

The vision aims to the restructuring of the craft sector as well as the emergence and development of a fabric of reference producers. The long-term goals are to seize export potential with a focus on European proximity markets, develop sales to tourists and improve sales with nationals.

Quantitatively, the national handicraft strategy aims to :

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

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

- Creation of a network of dynamic companies, real artisanal factories, through the emergence of reference actors ;
- Increasing of the turnover and the improvement of the living and working conditions of the mono-craftsmen.

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 ;
- 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 MAD 140 billion in 2020 ;
- Increase 2% contribution of the tourism Gross Domestic Product in the national GDP so as to reach MAD 150 billion in 2020 against MAD 60 billion 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 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 populations as well as to increase the value of exports from 8 to 44 billion dirhams 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 ratio 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 15-20 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 solidarity agriculture, located in rather unfavourable areas.
- **The fourth foundation** promotes the attraction of private investment of around MAD 10 billion per year through a targeted Morocco offer and accompanied by public support.
- **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 (MAPMF), local and regional elected representatives, economic operators and their professional organizations.

Partnerships take then different forms :

1. The Regional Agricultural Plans (PAR) established between Regions, Chambers of Agriculture and MAPMDREF;
2. The program contracts (CP) of the agricultural sectors signed between the inter-professions and the representative professional organizations and MAPMDREF;

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 recasting of the sectoral framework touching on many levels: land, 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 supermarket and intermediary marketing formulas and through improving access to wholesale markets and slaughterhouses.

Finally, in terms of support, monitoring and evaluation, a restructuring of the MAPMDREF 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, crop fertilization 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 1000 projects, both in production and in the food industry, benefiting 397,000 farmers and this for an overall investment of MAD 78 billion.

Pillar II is related to the solidarity support of small agriculture to improve the incomes of the most vulnerable farmers. In this context, it is planned to launch 911 projects known as 'social projects', for the benefit of 934,000 beneficiaries and total investment of MAD 21 billion, 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 ...).

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 in force 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 THE MARKETING OF 'TERROIR' 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 marketing mix, by making improvements to the products, packaging, pricing, promotion and enhancement of the labelling ;
- Finding market access routes by strengthening the links between producers and distributors in domestic and foreign target markets.

Local products should thus allow viable and sustainable development of remote or difficult to access areas. To do this, the selected priority action levers are located at different levels of the value chain and are as follows :

- **Lever 1** : Development and upgrading of local products groupings and development of equitable aggregation partnerships ;
- **Lever 2** : Establishment of regional logistics and distribution platforms ;
- **Lever 3** : Improving access to modern distribution markets domestically and internationally according to the Fair Trade model ;
- **Lever 4** : Support for labelling efforts by ensuring the recognition of labels and their readability by consumers ;

- **Lever 5 :** Realization of institutional campaigns to establish the reputation of local products and official labels among the general public.

In this context, the labelling was chosen in the framework of the Green Morocco Plan, especially its pillar II, among the main axes of development of agricultural products, in particular local products. Since the entry into force of Law 25-06 on Distinctive Signs of Origin and Quality, 62 local products have been labelled.

Also, in 2015, the Agricultural Development Agency set up a collective label «Terroir du Maroc» as a collective brand, owned by the Ministry of Agriculture, in order to regularize the use of the product's name and to promote and showcase Moroccan products to improve the income of small producers.



IMPLEMENTATION OF THE NATIONAL IRRIGATION WATER SAVING PROGRAM (PNEEI)

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 MAD 37 billion, 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 1.4 billion m³;
- The increase in the added value per m³ on average from MAD 2.6 / m³ to MAD 5.6 / 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 by reducing the leaching of fertilizer and better control of water supplies and fertilizers ;
- Mitigation of the risk of seawater intrusion into coastal aquifers due to the overexploitation of aquifers.

NATIONAL STRATEGY OF THE AGRICULTURAL CONSULTING

Developed in 2010 to accompany the implementation of the Green Morocco Plan, the national strategy of the Agricultural Consulting (SNCA) is based on a new approach of advising 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 advising by the year 2020 that is based on the progressive empowerment 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 responsible to relay the action of the State. The revision and redesign of the national system is made so that :

- 1- Going beyond the logic of the conventional extension, by providing the producers with the capacities to determine their needs, pinpoint their objectives, control their actions and, more broadly the management processes of their 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 valorization and marketing of products, certification, 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, channels 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 professional 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. 1.12.67 4 Rabii I 1434 (16 January 2013), the National Office of the Agricultural Consulting (ONCA) is the 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 is administered by a board of directors and managed by a Director General.

1- MISSIONS :

The National Office of the Agricultural Consulting is responsible for implementing government policy on agricultural advising, 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 farm 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 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 Consulting 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 mobilizable 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 :

- 12 Regional Directorates ;
- 50 Provincial Services ;
- 300 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 (12) ;
- 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 and Interprofessions ;
- Input suppliers ;
- Public and private firms ;
- Other stakeholders such as the partners of MAPMDREF (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.

4- PRIVATE AGRICULTURAL CONSULTING

As part of the Green Morocco Plan, the Ministry of Agriculture, Maritime Fisheries, Rural Development and Waters and Forests has carried out several reform projects including the regulation of the agricultural adviser profession. Thus, this new profession finds its justification in :

- The political opportunity offered by the new «Green Morocco Plan» agricultural development strategy for improving the quality of coaching services ;
- The progress made by research and professionals in the diversification of agricultural production and which require the improvement of the approaches and knowledge of managers ;
- The efficiency of the current supervisory system, which is affected by insufficient human and budgetary resources and therefore can't meet the needs of the various actors ;
- The introduction of a single or specific interlocutor (subject specialist) to a given problem for the farmer and its availability in all agricultural areas.
-

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. 2.14.527 falls within the framework of the implementation of the provisions of this law, it is published in the official journal No. 6334 of February 12, 2015, this decree determines and refers to the orders issued by MAPM which concern :

- The model statutes of the regional professional association and the national professional federation of agricultural advisors ;
- The model of accreditation to practice the profession of agricultural adviser ;
- The Curriculum Vitae and Declaration of Honor forms to accompany the application for accreditation to practice the agricultural advising profession ;
- The appointment of three (03) professionals to the National Agricultural Advisory Board, representing three agricultural production sectors, for a period of three years ;
- The qualification program and the list of institutions of higher education and agricultural vocational training for the award of the certificate of qualification to practice the profession of agricultural adviser ;
- The model of the agricultural consulting register and the conditions of its holding.

STRATEGY FOR AGRICULTURAL TRAINING AND RESEARCH

Support of 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 (ENAM) and the National School of Forestry engineers in Salé (ENFI).

By Decree No. 2.03.201 of 22 Rabia 1st 1427 (21 April 2006), 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.

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 10,000 young people in 20 professions.

Support of research and agricultural development :

The research and development (R & D) programs carried out, notably by INRA, which is the national institution whose mission is to undertake research as well as R & D for agricultural development. It is a deconcentrated institution and represented at the regional level by 10 Regional Centers for Agronomic Research (CRRA) covering the different agrosystems and having 23 experimental domains. INRA supports the PMV in terms of Research and R & D.

Research at INRA level is structured for the 2017-2020 medium-term research program in 18 megaprojects :

- Development of sustainable and resilient grain farming models ;
- Improvement and enhancement of production for a sustainable and competitive fruit and wine sector ;
- Improved productivity, sustainability and competitiveness of the olive tree ;
- Improving resilience for a sustainable reconstitution of the date palm ;
- Development of a competitive and sustainable citrus growing ;
- Sustainable development of the argan sector ;
- Development and promotion of the saffron sector ;
- Development of the small red fruits (strawberry) sector ;
- Development of the competitiveness and sustainability of the vegetable sector (tomato) ;
- Improvement and enhancement of red meat production for resilient and sustainable livestock systems ;
- Biotechnology for the development of national agriculture ;
- Sustainable management of water resources and efficiency of agricultural water use ;
- Studies on agricultural land productivity and development of decision support tools for sustainable agriculture ;
- Sustainable management of pastoral areas ;
- Conservation and sustainable use of genetic resources for food and agriculture ;
- Assessment of the impact of climate change on Moroccan agriculture ;
- Development and valorization of aromatic and medicinal species with high agronomic, economic and environmental value ;
- Rehabilitation, preservation and development of the cactus sector.

The areas of research and R & D activities also concern transversal domains and production sectors and 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, vines, 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 terroir products ;
- Studies of the typicality of terroir 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.

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 SDQQ (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.

Law No. 25-06 on the Distinctive Signs of Origin and Quality (SDOQ) of foodstuffs and agricultural and fishery products and its implementing texts. This introduces three SDOQs: the Protected Geographical Denomination (PGD), the Protected Designation of Origin (PDO) and the Agricultural Label (AL). The objective of this law is to preserve the diversity of agricultural and fishery products and to protect the cultural heritage associated with them, to enhance the characteristics linked to the terroir, to increase the quality of agricultural and fish products and to contribute to improving the revenues generated by their valorization. and strengthen consumer information.

As for the law of the interprofession, it works for the organization of operators of all components of the same sector (production, development and marketing) around a unified and concerted vision. It also aims to combine the efforts of stakeholders in key areas, such as coaching, research, technology transfer, information dissemination and product promotion.

Other texts governing the agricultural sector have been adopted, which mainly concern :

- The constitution of new inter-professions ;
- The recognition of the Distinctive Signs of Origin and Quality of new labeled local products ;
- Control of seedlings and seeds and marketing approvals ;
- The safety of agricultural and food products ;
- Incentives for agricultural investment.

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 MAD 147 billion, 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 12 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.

Moreover, for greater integration of the agro-industry and in order to work to make stronger 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	+ 335%	From 143 000 to 622 000 ha
Fertilizer use	+ 43%	From 1,02 to 1,46 millions de tonnes/year
Mechanization	+ 53%	55 000 to 84 000 tracteurs

For plant material :

Use of seed	+ 233%	From 0.7 to 2.5 millions quintals/year
Use of plants	+ 40%	+ 128 millions trees







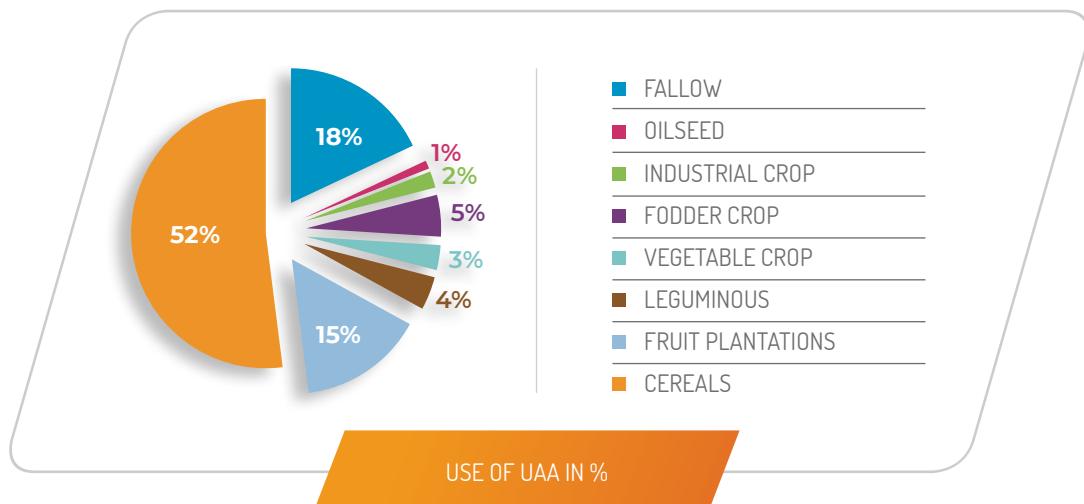
CHARACTERISTICS OF THE AGRICULTURAL SECTOR

NATURAL RESOURCES

Usable Agricultural Area (UAA)

With an area of almost 8.7 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.



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 52% 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% to 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 250 mm and less than 10% is found in the sub-humid and humid zones, with average annual rainfall exceeding 500 mm.

CLIMATE

Morocco is characterized by a very different climate according to the areas. It is in fact temperate in the coastline while it is desert 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 to the saharian and desert through the arid, semi-arid and the high mountain climate in the Rif, the Middle and High Atlas where altitudes are exceeding respectively 2500 m, 3000 m and 4000 m. Therefore, rainfall decrease generally from north to south and is only more important on the mountains where they reach 2000 mm in the Rif. They are less than 150 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 139 large dams with a total storage capacity of nearly 15.2 billion m³. Dams for agricultural use, the main ones of which are shown in the following table, have a total capacity of 13.3 billion m³.

DAMS	CAPACITY MILLION (M ³)
Complexe de barrages Sebou	5 321
Mansour Eddahbi	445
Moulay Youssef	149
Hassan Addakhil	313
Mokhtar Soussi	40
Oued El Makhazine	673
Complexe sur Oued Za	735
Bin El Ouidane	1233
Lalla Takerkoust	53
Aoulouz	89
Hassan 1 ^{er} - Sidi Driss	244
Al Massira - Ahmed El Hansali	3 381
Youssef Ben Tachfine	299
Abdelmoumene	198

The potential of irrigable land amounts to 1,664,000 ha of which 1,364 million ha of perennial irrigation and 300 000 ha of seasonal and spate irrigation. Moreover, the total area equipped for irrigation has reached 1,458,130 hectares, of which 1,016,700 hectares of areas developed by the State.

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

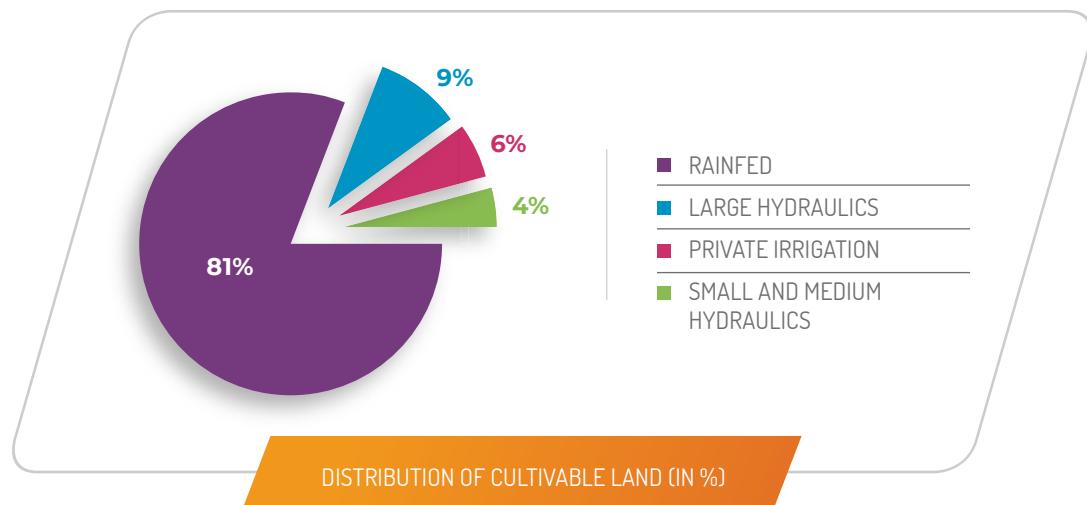
Large Hydraulics : corresponding to a perennial irrigation potential of 880 000 ha, it relates to nine major areas : Moulouya Loukkos, Gharb, Doukkala, Haouz, Tadla, Souss-Massa, Taïifalet and Ouarzazate. Irrigation water comes mainly from dams. The water management in agriculture and management of irrigation infrastructure are entrusted to the Regional Office for Agricultural Development.

Small and Medium Hydraulics : it covers an irrigable potential assessed at 484 000 ha of perennial irrigation and 300 000 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 Hydraulics is provided by the State by involving the beneficiaries through a participatory approach.

Private irrigation : hydro-agricultural development achieved by the private sector covers nearly 441,430 ha.

The given graph, below, shows the distribution of cultivable land:



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, 100% for citrus, 75% for forage and 75% for milk. In addition, it provides nearly 120 million working days per year, or about 1.65 million jobs, of which 250 000 permanent jobs.

AGRICULTURAL PRODUCTION SECTORS

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 program contracts with clear, comprehensive and coherent objectives, have been signed since 2008 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 85 000 ha and an average production of 1.3 million tonnes per year ;• 13 000 farmers, 21 million working days per year, divided into 12 million in orchards and 9 million in the packaging industry ;• Citrus exports oscillating around an average of 540 000 tonnes per year, the equivalent of MAD 3 billion of currency per year ;• Disparate marketing system with only the branch of exports which is relatively organized.
Objectives
<ul style="list-style-type: none">• Improving the competitiveness of the citrus industry ;• Achieving by the year 2020 an area of 105,000 hectares and a total production of around 2.9 million tonnes, 1.3 million tonnes for export.
Development axes
<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 : MAD 9 billion
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 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 105 000 ha in 2020 against an area of 85 000 ha in 2009 ;• Equipping, by the year 2020, 85% of the citrus area by drip irrigation systems in order to achieve an irrigation water savings of 150 million m³ ;• Establishment of the citrus interprofession, 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 program contract

Period covered : 2009 - 2018.

Signatories :

Representing the profession : Association of Citrus Producers in Morocco (ASPM)

Morocco Fruit Board (MFB)

Fresh Fruit (FF)

Government : Ministry of Agriculture and Maritime Fisheries

Ministry of Economy and Finance

Olive

Baseline data

- With around 680,000 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 ;
- 100,000 permanent jobs for around 400 000 farms;
- Large and medium farms representing about 6% of the total and an average productivity between 1.5 to 2.5 tonnes / ha ;
- Traditional sector with nearly 16,000 Maasras for a capacity of 170 000 t ;
- Modern sector of transformation of olives with 700 crushing units, with a total capacity of about 700 000 tonnes.

Objectives

- Extending olive cultivation over an area of 1.22 million hectares against 680,000 hectares in 2009, so as to achieve an olive production of 2.5 million t by 2020 against 700 000 t in 2009 ;
- Increasing domestic consumption of olive oils and table olives to reach respectively 4 kg / Person / Year and 5 kg / person / year ;
- Producing 170 million of certified seedlings between 2009 and 2020 ;
- Enhancing export volumes to reach ultimately 120 000 t of olive oil and 150 000 t in table olives ;
- Creating 200 000 additional permanent jobs.

Development axes

- Development of production and quality according to an integrated model ;
- Ensuring a strong and sustainable valorization ;
- Improving the framework conditions of the sector.

Investments

Total investment : MAD 29.5 billion

The main commitments of the State

- Introduction of a legal framework for the aggregation that preserves equity between aggregators and aggregated ;
- Upward revision of the amount of the investment subsidies for drip irrigation line, irrigation line other than drip irrigation and rainfed ;
- Encouragement of exports of olive oil by granting aid of MAD 2000 / t for a maximum period of 10 years.

The main commitments of the profession

- Achievement of olive productivist aggregation projects launched by the Government ;
- Equipment of olive orchards with irrigation systems on 136 000 ha ;
- Rehabilitation of olive trees on a surface of 300,000 ha and 200% increase in the crushing capacity to reach 2.2 million tonnes / year ;
- Significant improvement in price / quality ratio ;
- Establishment 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 program contract

Covered period : 2009 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of Olive (INTERPROLIVE)

Government : Ministry of Interior

Ministry of Economy and Finance

Ministry of Agriculture and Maritime Fisheries

Ministry of Industry, Investment, Trade and Digital Economy

Date Palm

Baseline data

- An activity which contributes between 20 to 60% to the formation of agricultural income for over 1.4 million of inhabitants ;
- A covered area of about 48,000 ha for a total number of 4.8 million palm trees ;
- A national palm grove one of the richest in the world, with over 220 varieties ;
- Challenges related to the treatment of the devastating effects of cycles of drought and various diseases.

Objectives

- Creating new plantations outside palm groves for 17,000 ha ;
- Rehabilitating and restoring 48,000 ha of existing palm groves ;
- Producing 160 000 t and 185 000 t of dates in 2020 and 2030 against 90 000 t in 2010 ;
- Strengthening national availabilities of vitro plants to increase the average production to 300 000 plant per year between 2010 and 2020 ;
- Valorising a total tonnage of 110 000 t in 2020, nearly 70% of production expected by 2020 : 70 000 t of packaged fresh dates, 20 000 t of processed products and 20 000 t of animal feed ;
- Developing exports to reach 5 000 t in 2020 against negligible quantities in 2010.

Development axes

- Enhancement of production capacity of stump and vitro plants of date palm ;
- Engagement in sustainable development paths, improving quality and valorization of production ;
- Improving the framework conditions of the sector.

Investments

Total investment : MAD 7.7 billion

The main commitments of the State

- 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

- 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 ratio and diversification of supply.

Data on the signed program contract

Covered period : 2010 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of Dates (FIMADATTES)

Government : Ministry of Interior

Ministry of Economy and Finance

Ministry of Agriculture and Maritime Fisheries

Secretary of State to the Ministry of Energy, Mines, Water and Environment in charge of water and environment

Early season vegetables

Baseline data

- An occupied average area of 260 000 ha ;
- A production of around 7 million tonnes in three sub sectors: vegetable crops of season (5.2 million t), early season (1.7 million t) and crops for agro-industry (140 000 t) ;
- Nearly 60 million working days (50 million at the level of production and 10 million in the packaging), the equivalent of 200,000 permanent jobs.

Objectives

- 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 3.5 million tonnes of early vegetables, of which 1.7 million tonnes for export by 2020.

Development axes

- Development of production around high added value projects (from 70 to 150 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 : MAD 21 billion

The main commitments of the State

- 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-Draâ region and supporting water-saving irrigation systems ;
- Marketing support and export promotion through the negotiation of agreements with partner countries ;
- Establishment of the interprofession of vegetables, supervising and training of producers.

The main commitments of the profession

- 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 ;
- Valorization 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 program contract

Covered period : 2009 - 2020.

Signatories :

Representing the profession : Moroccan Association of Producers and Producers Exporters of Fruits and Vegetables (APEFEL), Association of Producers Exporters of Market gardens (ASPEM), Moroccan Association of Packers Exporters of Red Fruits (AMCEF)

Government : Ministry of Interior, Ministry of economy and finance, Ministry of Agriculture and Maritime Fisheries, Ministry of Industry, Investment, Trade and Digital Economy, Secretary of State to the Ministry of Energy, Mines, Water and Environment in charge of water and environment

Seeds

Baseline data

- An annual turnover of MAD 600 million against a potential turnover of MAD 2.7 billion ;
- A main pillar for the upgrading of the agricultural sector through the dissemination of advances in genetics and effective fight against diseases.

Objectives

- Improving utilization of certified seeds for all species to achieve 45% for cereals, 10% for legumes, 31% for fodder and 100% for sugar beets, sugar cane and maize ;
- Increasing the share of national production of certified seeds, mainly for vegetable crops.

Development axes

- 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 : MAD 765 million

The main commitments of the State

- 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 MAD 150 million 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 budget of MAD 75 million for Training and Research.

The main commitments of the profession

- 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 ;
- Conduct activities related to evaluation tests.

Data on the signed program contract

Covered period : 2009 - 2020.

Signatories :

Representing the profession : Moroccan Association of Seed Multipliers (AMMS)

Moroccan Association of Seeds and Plants (AMSP)

Government : Ministry of Economy and Finance

Ministry of Agriculture and Maritime Fisheries

Fruit trees

Baseline data

- Occupied total area of more than 265 000 ha ;
- Average annual production of around 884 000 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 165,000 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.

Objectives

- Expanding the area of tree species targeted by the program contract over nearly 60,000 ha to raise the national area to 325 000 ha by 2020 ;
- Intensifying the existing plantations over an area of 63,000 Ha ;
- Conducting a fruit production of around 1.6 million tonnes per year against 884,000 t in 2011 ;
- Production of 20 million certified plants by 2020 ;
- Enhancing the tonnages exported to 50 000 t by 2020 ;
- Creating 40,000 new permanent jobs to reach 205,000 jobs by 2020.

Development axes

- 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 : MAD 10,2 billion

The main commitments of the State

- 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

- 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 ;
- Improvement of the domestic market and export promotion.

Data on the signed program contract

Covered period : 2011 - 2020.

Signatories :

Representing the profession : Federation of Arboriculture Development in Morocco (FEDAM)

Government : Ministry of Agriculture and Maritime Fisheries, Ministry of Economy and Finance

Ministry of Industry, Investment, Trade and Digital Economy

Perfume rose

Baseline data

- In the Dades Valley, the rose occupies 3250 line km as hedges or fences around agricultural plots, about 800 ha, or nearly 8% of the cultivated agricultural land ;
- The average annual production of fresh roses is 2 000 t ;
- Morocco ranks third among global producers of perfume rose after Bulgaria and Turkey ;
- On average, a kilogram corresponds to 280 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 1,000 tonnes of fresh roses.

Objectives

- Repopulating and densifying 200 ha over the existing 800 ha ;
- Increasing the area reserved to the cultivation of the rose of 400 ha, to achieve 1,200 ha ;
- Increasing the production to 4,800 t / year of fresh rose instead of the present 2 000 t ;
- Increasing the quantity processed to reach 3800 t / year instead of the present 1000 tonnes ;
- Increasing the annual quantities exported as follows:
 - Essential oil: 100 Kg to 250 Kg ;
 - Concrete: from 2500 Kg to 5000 Kg ;
 - Rose water: 100 t to 300 t.

Development axes

- Development of production and quality improvement ;
- Improving the sector framework conditions ;
- Improving condition of valorisation, marketing and promotion of the rose.

Investments

Total investment : MAD 100 million

The main commitments of the State

- 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

- 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 program contract

Covered period : 2012 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of the perfume rose(FIMAROSE)

Government : Ministry of economy and finance, Ministry of Agriculture and Maritime Fisheries

Saffron**Baseline data**

- The Moroccan saffron production, estimated at 3 tonnes / year, represents about 1% of world production which is nearly 250 t / year ;
- Saffron is exported to the EU, with a value of MAD 35 million in 2009, mainly to Spain (61.4%), Switzerland (36.6%), France (1.2%), Italy and other countries (0.8%).

Objectives

- Increasing the area reserved for the cultivation of saffron from 610 ha to 1,350 ha by 2020 ;
- Improving the production of saffron to reach 9 t / year by 2020 ;
- Increasing the quantity processed and packaged to reach 6 t / year instead 0.009 t ;
- Increasing the quantity exported to reach 6 t / year.

Development axes

- 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 : MAD 100 million

The main commitments of the State

- Encouraging the production of quality bulbs ;
- Realization of collective hydro-agricultural developments including the digging of wells/boreholes, their joining to the electrical network and their equipment in pumping equipment ;
- Strengthening of training and mentoring programs ;
- Strengthening research and development work ;
- Strengthening of marketing actions of saffron products...

The main commitments of the profession

- 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 program contract

Covered period : 2012 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of Saffron (FIMASAFRAN)

Government : Ministry of economy and finance

Ministry of Agriculture and Maritime Fisheries

Argan

Baseline data

- The argan forest covers an area of 800 000 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 ;
- The argan forest is the second forest species in the country

Objectives

- Rehabilitating 200 000 ha of the argan forest ;
- Domesticating the argan tree and spreading its cultivation in modern management over 5,000 ha ;
- Increasing the production of argan oil to 10 000 t / year by 2020 instead of 4000 t / year ;
- Implementing projects of Pillars I and II for a modern and efficient promotion and valorization of the products of the argan tree ;
- Defending the uniqueness of 'Morocco Label' of the argan tree and all its products and derivatives on the international market.

Development axes

- Emergence of an integrated R & D competence pole dedicated to the argan tree ;
- Sustainable development of the production and quality according to an integrated model preserving the argan forest and its natural resources ;
- Development of a strong and sustainable valorisation ;
- Improving the sector framework conditions.

Investments

Total investment : MAD 2.81 billion

The main commitments of the State

- Endowment of the argan sector with the necessary infrastructures to promote a proximity and local research ;
- Development and implementation of a research program dedicated to the sector of the argan ;
- Establishment of an information system on the argan ;
- Improving the performance of the existing argan forest ;
- Mobilization of water resources ;
- Development of intensive argan poles ;
- Development of R & D specific to the argan tree ;
- Transfer of technology and support...

The main commitments of the profession

- Installation of modern argan plantations ;
- Establishment of an information system on the argan ;
- Improving the performance of the existing argan forest ;
- Valorisation of production ;
- Strengthening the argan interprofession ;
- Strengthening the supervision and mentoring of producers...

Data on the signed program contract

Covered period : 2011 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of the Argane sector (FIMARGANE)

National Federation of rights holders using the argan tree

Government : Ministry of Agriculture and Maritime Fisheries, Ministry of Economy and Finance

Cereals**Baseline data**

The sector occupies a major place in the agricultural economy :

- 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 MAD 8 billion) ;
- Major social weight for a fragile network of producers: predominant cultivation for almost all of the farms ;
- Paramount importance in consumption :
 - Very high Human consumption with home consumption reaching almost 30% of the volumes produced ;
 - Strong contribution to the animal consumption resulting in very marked interdependence between cereal crops and livestock.

Objectives

- Achieving, by 2020, a cereal production base of around an average 7 million tonnes per year for an area of about 4.2 million ha ;
- Raising the turnover to MAD 20 billion by the year 2020 ;
- Reducing imports from 15% to 20%.

Development axes

- Productivist redesign of the upstream of the sector around the aggregation ;
- Development of the cereal mid-stream ;
- Restructuring of the downstream of the sector ;
- Gradual revision of the regulatory mechanisms and supervision of the sector.

Investments

Total investment : MAD 2.6 billion

The main commitments of the State

- Development of productivist and social aggregation projects (Pillars I and II of the Green Morocco Plan) ;
- Support for the generalization of the use of high performance inputs and mechanization ;
- Promoting the emergence of 2 to 3 Cereal mid-stream operators at national level ;
- Development of agricultural insurance and R & D ;
- Consolidation and sectoral restructuring of industrial milling ;
- Support for the upgrade of the second processing ;
- Establishment of a commodities exchange.

The main commitments of the profession

- Realization of productivist projects ;
- Support for the emergence of mid-stream actors ;
- Upgrading of the second processing ;
- Contribution to the process of revision of the compensation system within the sector ;
- Organization of all distribution networks throughout the value chain ;
- Animation, technical coaching and training of actors in the cereal sector ;
- Mobilisation of resources for the development of the profession.

Data on the signed program contract

Covered period : 2009 – 2020

Signatories :

Representing the profession : Interprofessional Federation of Cereal Activities (FIAC)

Government : Ministry of Interior, Ministry of Economy and Finance, Ministry of Agriculture and Maritime Fisheries

Ministry of Industry, Investment, Trade and Digital Economy

Delegate Ministry to the Prime Minister in charge of Economic and General Affairs

Organic Production

Baseline data

- Cultivated area for the season 2010/11: 3800 ha and production of 40 000 tonnes ;
- Area of spontaneous plantations : nearly 618,700 ha, mainly represented by the argan forest (400 000 ha), aromatic and medicinal plants (200 000 ha) and cacti (20 000 ha) ;
- Exports: 9000 T, 8300 T of fresh products and 700 T of processed products ;
- Employment: one million working days ;
- Contribution to foreign currency through exports: 100 million dirhams.

Objectives

- Achieving a total area of 40,000 ha for a plant production of 400,000 t (including 60.000T for export) and livestock production of 8,500 t ;
- Creating 9 Million of workdays which is the equivalent to 35,000 permanent jobs ;
- Generating a total amount in foreign currency equivalent to 800 million DH ;
- Increasing the consumption of organic products at the domestic market level.

Development axes

- 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 : MAD 1.121 billion

The main commitments of the State

- 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

- 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 program contract

Covered period : 2011 – 2020

Signatories :

Representing the profession : Moroccan Association of the organic production sector (A.MA.BIO)

Government : Ministry of Economy and Finance, Ministry of Agriculture and Maritime Fisheries, Ministry of Industry, Investment, Trade and Digital Economy

Oilseed crops
baseline data
<ul style="list-style-type: none"> • An average covered area of 44,000 ha / year of sunflower with an annual production of 48,000 t and an average yield of 11 Quintals/ Ha ; • An average volume of 19,000 T delivered to oilseed processors allowing to cover less than 1.5% of annual needs for edible oil ; • An average production of edible oil of 8000 tonnes per year ; • An overall crushing capacity of 700,000 t and a global refining capacity of 700,000 t / year.
Objectives
<ul style="list-style-type: none"> • progressive extension and diversification of the area conducted annually in oilseed crops to reach 127 000 ha of which 85 000 ha of sunflower and 42 000 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 93 000 tonnes in 2020 against an average of 8,000 t at present ; • Increasing the rate of coverage of oil needs from domestic production to reach 19% in 2020 against the current average 1.5%.
Development axes
<p>Upgrading the agricultural upstream</p> <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 ; • Development of aggregation Projects. <p>Improvement of the downstream of the sector</p> <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 tool. <p>Improvement of upstream-downstream relational framework</p> <ul style="list-style-type: none"> • Establishment of a framework for consultation and coordination between the various stakeholders in application 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 : MAD 421 million
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

- 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 producer prices 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 program contract

Covered period : 2013 – 2020

Signatories :

Representing the profession : Interprofessional Federation of Oilseeds (FOLEA)

Government : Ministry of Economy and Finance

Ministry of Agriculture and Maritime Fisheries

Ministry of Industry, Investment, Trade and Digital Economy

Delegate Ministry to the Head of Government in charge of General Affairs and Governance



Rice sector
Baseline data
<ul style="list-style-type: none"> Potential Area: 14,000 Ha ; Average area sown in the last 5 years: 6,500 ha / year ; Production: 50,000 t ; Direct revenue for 2,500 farmers ; Creation of 1,500,000 working days / year, of which 450,000 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: 2,000 tonnes / year ; Average imports of 4,700 tonnes / year.
Objectives
<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 11,000 ha against 6,500 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.
Development axes
<ul style="list-style-type: none"> Improving the profitability of the crops ; Modernization of the industrial equipments ; Improving the framework conditions of the sector.
Investments
Total investment : MAD 270 million
The main commitments of the State
<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.
The main commitments of the profession
<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.
Data on the signed program contract
Period covered : 2014 – 2020.
Signatories :
Representing the profession : National Interprofessional Federation of Rice (FNIR)
Government : Ministry of Economy and Finance, Ministry of Agriculture and Maritime Fisheries, Ministry of Industry, Investment, Trade and Digital Economy

Sugar

Baseline data

- A local production of sugar covering almost 43% of the country's needs ;
- A sector representing 9 million seasonal working days per year ;
- Approximately 80,000 farmers cultivating areas of less than one hectare ;
- A sugar industry composed of 5 companies belonging to the COSUMAR group.

Objectives

- The gradual extension of the area achieved annually in 70,600 hectares of sugar crops to reach 105,700 ha of which 77,500 ha of sugar beet against 54,200 ha, and 28,200 ha of sugarcane against 16,400 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 8.5T / ha for beet and 9.6 T / ha against 7.2T / ha for sugar cane ;
- Improving the production of white sugar to reach 856,000 against 410,000T ;
- Improving the coverage to 62% against an average of 35% ;
- Improving the effective capacity of sugar handling, that will increase from 42,500 t / day currently to 62,500 tonnes / day by 2020.

Development axes

- 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.

Investments

Total investment : MAD 7.6 billion

The main commitments of the State

- 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 6,000 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.

The main commitments of the profession

- 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.

Data on the signed program contract

Covered period : 2013 – 2020

Signatories :

Representing the profession : Moroccan Interprofessional Federation of Sugar (FIMASUCRE)

Government : Ministry of Economy and Finance, Ministry of Agriculture and Maritime Fisheries, Ministry of Industry, Investment, Trade and Digital Economy

Delegate Ministry to the Head of Government in charge of General Affairs and Governance

Milk sector
Baseline data
<ul style="list-style-type: none"> • A national milk production which was increased from 1.7 billion litres in 2009 to 2.3 billion litres in 2013 ; • A sector that creates 460,000 permanent jobs ; • Low milk productivity of all breeds of approximately 1,900 kg / cow / year.
Objectives
<ul style="list-style-type: none"> • Produce 4 billion litres of milk by 2020 ; • Improve access conditions to milk and milk products for consumers to reach 90 litres per habitant per year by 2020 ; • Increase the average production per cow per year to 3,000 litres/year ; • Achieving self-sufficiency in dairy raw material ; • Creation of 40,000 permanent jobs.
Development axes
<ul style="list-style-type: none"> • Develop the upstream of the milk industry by improving the productivity and developing modern dairy units ; • Develop the downstream of the milk industry by creating or extending the milk processing units ; • Improving the sector framework conditions.
Investments
Total investment : MAD 6.606 billion, of which MAD 1.27 billion is a contribution of the state
The main commitments of the State
<ul style="list-style-type: none"> • Support the genetic improvement as part of the FDA, by developing local production of purebred dairy heifers and the acquisition of 45,000 pure race imported dairy heifers ; • Promote investment in breeding unit project by according financial aids for building livestock and acquisition of livestock equipment ; • Financial contribution for creation and/or extension of milk valorization unit ; • Promote milk consumption and quality ; • Support the implementation of training programs ; • Support for R & D programs ; • Identify cattle by the national cattle identification and traceability system.
The main commitments of the profession
<ul style="list-style-type: none"> • Improve productivity by the implementation of the selection and genetic program for dairy cattle breeds and the forage identification program and contribute to farm sanitation with respect of MRLCs ; • Enhance investments in production structures ; • Valorization of milk through the creation and extension of new milk processing units and the creation of 3 milk drying units and 10 cheese production units ; • Creating additional jobs estimated at over 40 000 direct jobs in the various links in the production chain ; • Increase milk production to 4 billion litres and consumption to 90 litres of milk per habitant per year by 2020 ; • Upgrading of the interprofession according to the law O3-12 and support to the professional associations members ; • Promote the consumption (organization of the milk show, media campaigns, guide of good practices, ...) ; • Implementation of training programs at the Zoopole ; • Contribution to the achievement of the national identification and cattle traceability program by raising awareness of breeders and support training identifiers agents.
Data on the signed program contract
Covered area : 2015-2020
Signatories :
Representing the profession : Moroccan Interprofessional Federation of Milk (FIMALAIT).
Government : Ministry of economy and finance, Ministry of Agriculture and Maritime Fisheries

Poultry sector

Baseline data

- 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 of 560,000 tonnes of meat and 4.5 billion of eggs in 2010 ;
- A consumption per habitant and per year of 17.2 kg of meat and 138 of eggs in 2010 ;
- The investments made in the sector of nearly 9.4 billion dirhams in 2010 ;
- A turnover of 23.2 billion dirhams in 2010 ;
- A job creation of around 360,000, with 110,000 direct jobs in production units and 250 000 indirect jobs in the circuits of distribution and marketing

Objectives

- Production of 900,000 tonnes of meat and 7.2 billion eggs by 2020 ;
- Increase the consumption per habitant per year to 25 kg of meat and 200 eggs by 2020 ;
- Modernisation of animal farming units, installation of valorisation structures of poultry products and development of aggregation and Integration models ;
- Creation of new 140,000 jobs from now up to the year 2020 ;
- 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, 100,000 tonnes by 2020 ;
- Increasing the exported quantities of poultry products from 400 tonnes in 2010 to 4,400 tonnes in 2020.

Development axes

- Strengthening of modern poultry farming, development of models of aggregation and integration and development of poultry products ;
- Improving the sector framework conditions.

Investments

Total investment : MAD 3.762 billion, of which 700 million contribution from the state

The main commitments of the State

- Promotion of investment in modern poultry farming, the development of models of aggregation and integration and enhancement of poultry products (slaughterhouses and valorisation units) :
 - Credit Dawajine: interest rate of 6% (out of tax) ;
 - 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.

The main commitments of the profession

- Increasing production and consumption to reach 900 000 tonnes of poultry and 7.2 billion eggs for consumption in 2020 ;
- Creation of 80,000 direct jobs and 60,000 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 ;
- Remedy to spread of avian diseases between animal farms.

Data on the signed program contract

Covered period : 2011 - 2020.

Signatories :

Representing the profession : Interprofessional Federation of the Poultry Sector (FISA)

Government : Ministry of economy and finance, Ministry of Agriculture and Maritime Fisheries

Camel sector
Baseline data
<ul style="list-style-type: none"> Number of camels amounting to about 190,000 head in 2011, 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.
Objectives
<ul style="list-style-type: none"> Development of production chains to reach 4,860 tonnes of meat and 10,200 tonnes of milk by 2020; 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.
Development axes
<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: MAD 702 million, of which 400 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 program contract

Covered period : 2011 - 2020.

Signatories :

Representing the profession : Regional chambers of agriculture of 3 regions :

- 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

- Significant honey resources: forests of eucalyptus, citrus and rosacea, forage crops.... ;
- The number of hives is 360,000 hives(250 000 traditional and 110,000 modern) in 2010 ;
- Production of 3,500 tonnes of honey in 2010.

Objectives

- Production of 16,000 tonnes of honey by 2020 ;
- Increasing the number of modern hives to 610,000 by 2020 ;
- Promoting the investment and the creation of 40,000 new jobs ;
- Encouraging the valorisation of hive 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 hive products ;
- Development of pollination services ;
- Guaranteeing the durability and sustainability of production systems and the preservation of environmental and biodiversity balance.

Development axes

- Development of modern productive apian units, social aggregation and valorisation of bee products ;
- Improving the sector framework conditions.

Investments

Total investment: MAD 1.483 billion, of which MAD 431 million contributions from the state.

The main commitments of the State

- Investment Promotion :
 - Support within the framework of the FDA: Development of modern beekeeping units, aggregation and valorisation of hive products.
- Promotion of the sector through :
 - Protection and development of the Saharan bee ;
 - The contribution to the achievement of media campaigns on the quality and consumption of hive 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

- Develop the production to reach 16,000 tonnes and the consumption to reach 400g per habitant per year by 2020 ;
- Increasing the investments for the creation of beekeeping units of production and valorisation ;
- Creation of 40,000 new jobs ;
- Promotion of consumption and quality of hive products ;
- Upgrading the interprofession and human resources.

Data on the signed program contract

Covered period : 2011 - 2020.

Signatories :

Representing the profession : Moroccan Interprofessional Federation of Beekeeping (FIMAP)

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 of 490,000 tonnes in 2013 ; • A national consumption of red meat of 14.2 kg / person / year in 2013; • An annual turnover of around 25 billion dirhams.
Objectives
<ul style="list-style-type: none"> • Production of 612,000 tonnes by 2020 ; • National consumption of red meat of 17.3/habitant/year by 2020 ; • 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.
Development axes
<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: MAD 5 billion, of which 1.45 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 modern 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 612,000 tonnes in 2020 ; • 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 80,000 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 program contract
<p>Period covered : 2014 - 2020.</p> <p>Signatories :</p> <p>Representing the profession : Interprofessional Federation of Red Meats (FIVIAR)</p> <p>Government : Ministry of Interior, Ministry of economy and finance, Ministry of Agriculture and Maritime Fisheries</p>

'Terroir' Products and Labelling

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

- Development of the upstream through :
 - Upgrading of producer groups and improvement of production conditions in accordance with safety and quality standards through the construction of new production units and layout of the premises of existing production units ;
 - 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 tourism market for the terroir products through the implementation of an integrated development program and multilateral partnerships ;
 - Support the market access to producer groups through packaging support and organization and contribution to promotional and commercial events.
- 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 producer groups.

In addition, since the entry into force of Law No. 25-06 and its implementing regulations, 62 SDOQ (2018), hereafter, have been recognized :

product Name	Applicant group	Region(s)
1 Protected Geographical Denomination (PGD) «Argane»	Moroccan Association of the Geographical Indication of Argan Oil	Souss-Massa, Marrakech-Safi and Guelmim-Oued Noun
2 Protected Designation of Origin (PDO) «Olive Oil Tyout - Chiadma»	Tyout cooperative of production and marketing of olive oil	Marrakech-Safi
3 PGD «Clementine of Berkane»	Association of Protected Geographical Indication of Clementine of Berkane	L'Oriental
4 PDO «Saffron Taliouine»	Regional Council of Souss Massa Draa	Souss-Massa
5 PGD «Dates Majhoul of Tafilalet»	Oasis Tafilalet Association for the valorization of terroir Products and Promotion of Organic Agriculture	Drâa-Tafilalet
6 Agricultural Label (AL) «Suckling Lamb»	National Sheep and Goats Association	---
7 PGD «Lamb Meat Beni Guil»	National Sheep and Goats Association	L'Oriental
8 PGD «Pomegranate Sefri Ouled Abdellah»	Abdiya Association for the Production and Marketing of Ouled Abdellah Pomegranates	Beni Mellal-Khénifra

9	L'IGP «Goat Cheese Chefchaouen»	National Sheep and Goats Association	Tanger-Tétouan-Al Hoceima
10	PGD « Prickly Pear Ait Baamrane »	Economic Interest Group (EIG) Cactus Aït Baamrane	Souss-Massa et Guelmim-Oued Noun
11	PDO «Rose Kelâat M'Gouna-Dades »	Regional Office of Agricultural Development of Ouarzazate	Drâa-Tafilalet
12	PGDP «Dates Aziza Figuig»	Agricultural Cooperative El Massira	L'Oriental
13	PGD «Almond Tafraout »	Economic Interest Group Taddart N'louz	Souss-Massa
14	PGD «Dates Boufeggous»	National Federation of Date Producers	Souss-Massa, Drâa-Tafilalet, Guelmim-Oued Noun et l'Oriental
15	PGD «Euphorbia Honey Tadla-Azilal»	Union of Apriarian Cooperatives TADLA AZILAL (UCATAZ)	Béni Mellal-Khénifra
16	PGD «Apple of Midelt»	Midelt Apple producers Association (APPM)	Drâa-Tafilalet
17	PGD «Extra Virgin Olive Oil Ouezzane»	Economic Interest Group «Women of the Rif»	Tanger-Tétouan-Al Hoceima
18	PGD «Arbutus Honey Jbal My Abdessalam»	Union of Apriarian Cooperatives Kotb Moulay Abdessalam	Tanger-Tétouan-Al Hoceima
19	PGD «Dates Bouittob of Tata»	Agricultural Cooperative Taskala	Souss-Massa
20	PGD «Medlars of Zegzel»	Medlars oued Zegzel cooperative	L'Oriental
21	PGD «Keskes Khoumassi»	The Cluster of the Saharan oases	Guelmim-Oued Noun, Laâyoune-Sakia El Hamra et Dakhla-Oued Ed-Dahab
22	PGD «Capers of Safi»	Safi Provincial Association of Capers Producers	Marrakech-Safi
23	PDO «Essential Oil of Lavandin Oulmès»	Al Khozama Cooperative of Aromatic and Medicinal Plants	Rabat-Salé-Kénitra
24	PDO «Extra Virgin Olive Oil Ghmat Aylane»	Aylane Association for the Development of terroir products of rural districts Ourika, Ghmat and Tamazout	Marrakech-Safi
25	PGD «Grape Doukkali»	Economic Interest Group Mountiji Al Ainab Doukkali	Casablanca-Settat
26	PGD «Nuts of Azilal»	Ait Bouguemmez Agricultural Cooperative of Agricultural Producers	Béni Mellal-Khénifra
27	PGD «Dates Jihel Drâa»	National Dates Producers Federation (FENAPROD)	Souss-Massa, Drâa-Tafilalet et Guelmim-Oued Noun
28	The Agricultural Label «Dates Najda»	The National Federation of Date Producers	---
29	PGD «Almonds of Rif»	Le Groupement d'Intérêt Economique «Louzeima»	Tanger-Tétouan-Al Hoceima
30	PGD «Henna of Ait Ouabelli»	Cluster Association of Sahara Oases	Souss-Massa

31	PGD «Olive Oil Outat El Haj»	Economic Interest Group «Tahadi Al Alfya»	Fès- Meknès
32	PGD «Fig dry Nabout of Taounate»	Manabia Bouadel Cooperative for Agricultural Development	Fès- Meknès
33	PGD «Olive Oil of Tafersite»	Al Amana Agricultural Cooperative	L'Oriental
34	PGD «Euphorbia Honey of the Sahara»	Cluster Association of Sahara Oases	Guelmim-Oued Noun
35	PGD «Zær's lentil»	Moullablad Association for Agricultural Development	Rabat- Salé- Kénitra
36	PGD «Quince of Oued El Maleh»	Agricultural Cooperative Oued El Maleh-Coing	Casablanca-Settat
37	PGD «Essential Oil of the Oriental Rosemary»	Beni Yaala Zekara Cooperative	L'Oriental
38	PGD «Dried Rosemary Leaves Oriental»	Beni Yaala Zekara Cooperative	L'Oriental
39	PGD «Foum Zguid Henna»	Cluster Association of Sahara Oases "C.O.S"	Souss-Massa
40	PGD «Cumin Beldi of Rhamna»	Rhamna Cooperative for the Production and Marketing of Cumin Beldi	Marrakech- Safi
41	PGD «Prickly Pear Fig Dellahia»	Sobbar Targuiste Association for Cactus Development	Tanger-Tetouan – Al Houseima
42	PGD «Aknoul's almond»	Women's Agricultural Cooperative for the Production and Valorization of Tighzratine Almonds	Fès-Meknès
43	PGD «Amellago's almond»	Imlouane Agricultural Cooperative	Drâa-Tafilalet
44	PGD «Sefrou's olive oil»	Economic Interest Group Sefrou Oil	Fès-Meknès
45	PGD «Milk of Chamelle of the Sahara»	Professional Association of Camelins breeders of the Oued Eddahab Lagouira Region	Dakhla – Oued Ed Dahab
46	Agricultural Label «Al Alfya olive oil»	National Association of Economic Interest Groupings of the Olive Tree	---
47	PGD «Souss-Massa's Thyme honey»	Regional Association of Beekeepers of Souss-Massa Drâa	Souss-Massa
48	PGD «Zerhoune's olive oil»	Economic Interest Group «Walili Terroir Products»	Fès-Meknès
49	PGD «Outoukdjm dates of Toudgha Tinghir»	Economic Interest Group Toumour Ouahate Toudgha Tinghir	Drâa-Tafilalet
50	PGD «Zendaz Massif Bouiblane's honey»	Beekeeping Cooperatives Union of Boulmane	Fès-Meknès
51	PGD «Ait Attab's olive oil»	Economic Interest Group «Zouyout Ait Attab»	Béni Mellal-Khénifra
52	Agricultural label «Chicken farmer»	A BELDI company	---

53	Agricultural label «Sahara's Chamelle cheese»	Ajbane Dakhla Cooperative	---
54	PGD «Oriental Rosemary Honey»	Association of Oriental Rosemary Honey's GI	Oriental
55	PGD «Souss Massa's Spurge honey »	Regional Association of Beekeepers of Souss Massa	Souss Massa
56	PGD «Zenatia's Hot Pepper»	Zenata Agricultural Cooperative	Casablanca-Settat
57	PGD «Amez Miz's olive oil»	Union of Amez Miz's Olive Oil Cooperatives	Marrakech-Safi
58	PGD «Bousthemî's dates»	National Federation of Date Producers	Drâa-Tafilalet
59	PGD «Dir Beni Mellal's olive oil»	Economic Interest Group zouyout Dir Beni Mellal	Béni Mellal-Khénifra
60	PGD «Lemta Fès's olive oil»	Economic Interest Group Lemta Fès	Fès-Meknès
61	PDO «Kelâat Mgouna Dadès's Rose water»	Moroccan Interprofessional Federation of Perfume Rose	Drâa-Tafilalet
62	Agricultural label «Moroccan Black Ripped Olives»	The canning industry federation of agricultural products of Morocco	National

However, the national potential of production of local products is very important given the wealth of the offer identified by region like it shows in the table and the map below :

Region	Some key products
Tanger-Tétouan-Al Hoceima	Chefchaouen Goat Cheese, Jbal My Abdessalam Arbutus Honey, Ouezzane Extra Virgin Olive Oil, Rif Almonds, AL Hoceima's Dellahia Prickly Pear, Orange Zghiri, Samet (Grape Syrup), Ouezzane Figs, Ouezzane table olives, Aromatic and medicinal plants, Al Hoceima honey, Aït Kamra peas, Rissana melon, Tétouan small onions, peanut.
L'Oriental	Clementine of Berkane, Beni Guil Lamb Meat, Figuig's Aziza Bouzid dates, Boufeggous Dates, Zegzel medlar, Dried Oriental Rosemary Leaves, Oriental Rosemary Essential Oil, Tafersite Olive Oil, Oriental's Rosemary Honey, Desert Truffles, Quicotte, Chetouia Fig, Argan Oil, Bean, Talsint Goat Meat, Assiane Dates, Taddart Canned Olives, El Guerbouz Prickly Pear, Sidi Bouhria's Almonds, Olive Oil of Zkara.
Fès-Meknès	Beni Guil Lamb Meat, Outat El Haj Olive Oil, Nabout Dry Fig of Taounate, Aknoul Almond, Sefrou Olive Oil, Timahdite Lamb Meat, Taounate Olive Oil, Lemta Olive Oil, Skoura Olive Oil, L'mta table olives, Guigou onion, Missour turnip, Meslagh watermelon, Honey, Immouzzer endive, Chaari figs, Tafajight apple, Capers, Taounate figs, Ain Leuh cherry, Agourai anise, Azrou apple, plums from Sefrou.

Rabat-Salé-Kénitra	Oulmes Lavandin Essential Oil, Zaer's Lentil, Mâmora Truffles, Skhirate Muscat Grapes, Skhirate Extra Fine Green Beans, Oulmes's lavender, Moyen Atlas's Goat meat, Couscous, Oulmes- Zaér's beef, S'houl Cactus, Honey, Chamomile, Artichoke, Capers of Sidi Kacem.
Béni Mellal-Khénifra	Ouled Abdellah Sefri Grenada, Spurge Honey, Azilal Nuts, Azilal Almonds, Iwâriden-Dermnate Grape, Aromatic and Medicinal Plants, Ait Attab olive oil, Dir Béni Mellal olive oil, Ouaoumana olive oil, Ifermoragh durum wheat, Moulay Bouazza goat meat, Boujaad lamb meat, Ain kaïcher figs, Boujaad goat meat, Kerrouchen grape, Ouled Ali pepper.
Casablanca-Settat	Doukkali Grape, Oued El Maleh quinces, Haddaoui Cactus, Mejdoubia Cactus, Oued El Maleh Hot Pepper, Tamaris Mint, L'Brouj Mint, Pomegranate Tmassine, Sârdi lamb meat, White truffle of the coast, Had Ouled Frej Fig, Smen Doukkali.
Marrakech-Safi	Argan Products, Tyout Chiadma Olive Oil, Safi Capers, Aghmat Aylane Extra Virgin Olive Oil, Rhamna Beldi Cumin, Haha Almonds, Sârdi Lamb Meat, Haha Honey, Rhamna Cactus, Skhour Pomegranate, Aïn Hjar Pomegranate, Sour Lâaz Pomegranate, Chiadma Grape, Iggout Grape, El Fellouia Mint, Iris, Aloudiane's Okra, Marrakech Limonette, Fennel, Azembou, Atlas Walnut, White truffle of the coast, Kahhouli Figs, Maachi Mint, Amizmiz Olive Oil, Akermoud (Essaouira) Pea.
Draa-Tafilalet	Taliouine saffron, Tafilalet Majhoul dates, Kelaat M'gouna-Dades rose, Boufeggous dates, Midelt apple, Draâ's Jihel dates, Amellagou-Assoul almonds, Sifa Arfoud okra, Imilchil apple, Rich Honey, Durum Wheat of high Ziz, Tazarin Henna, Aromatic and Medicinal Plants, Rich Olive Oil, Alnif Cumin, Saghrrou Lamb meat, Siroua Lamb meat, Drâa Goat meat, Millet of Aghbalou N'kardous.
Souss-Massa	Argan Products, Taliouine Saffron, Tâfraout Almond, Boufeggous Dates, Tata's Bouittob Dates, Keskes Khoumassi, Draâ's Jihel Dates, Ait Ouâbelli Henna, Foum-Zguid Henna, Sahara Spurge Honey, Sahara Camel Milk, Aromatic and Medicinal Plants, Carob, Capers, Honey, Tamri Banana.
Guelmim-Oued Noun	Argan Products, Ait Baâmrane's Prickly Pear, Saharan Spurge Honey, Guelmim's Cactus, Keskes Khoumassi, Sahara's Camel Milk, fresh cheese of camel milk, "Lfrik" Fermented Camel Milk, Loudek , Tichtar.
Laayoune-Sakia El Hamra	Keskes Khoumassi, Sahara's Camel Milk, fresh cheese of camel milk, Jdari, Camoun Reg, "Lfrik" Fermented Camel Milk, Loudek, Tichtar.
Dakhla-Oued Eddahab	Keskes Khoumassi, Sahara's Camel Milk, fresh cheese of camel milk, «Lfrik» Fermented Camel Milk, Loudek, Tichtar.



MAROC

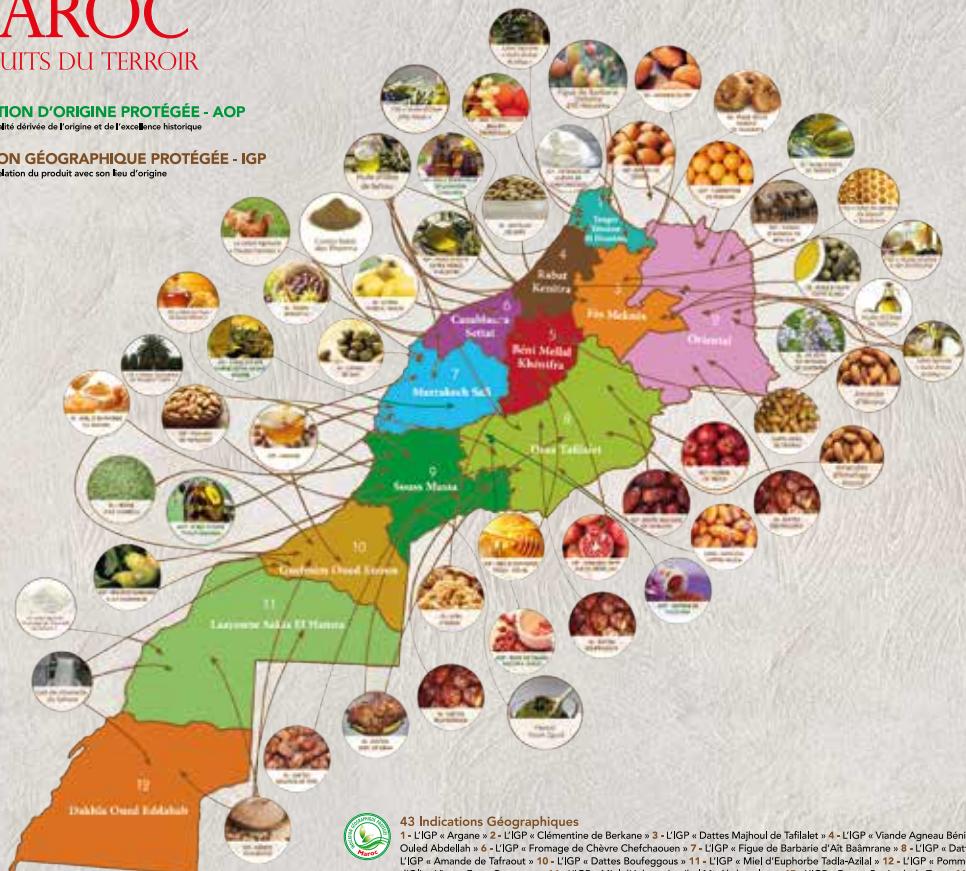
PRODUITS DU TERROIR

APPELATION D'ORIGINE PROTÉGÉE - AOP

Garantie de la qualité dérivée de l'origine et de l'excellence historique

INDICATION GÉOGRAPHIQUE PROTÉGÉE - IGP

Garantie de la relation du produit avec son lieu d'origine



43 Indications Géographiques

- 1 - L'IGP « Argane »
- 2 - L'IGP « Clémentine de Berkane »
- 3 - L'IGP « Dattes Majhoul de Tafilalet »
- 4 - L'IGP « Viande Agneau Béni Guil »
- 5 - L'IGP « Grenade Sefri Ouled Abdellah »
- 6 - L'IGP « Fromage de Chèvre Chefchaouen »
- 7 - L'IGP « Figue de Barbarie d'Aït Baâmmâne »
- 8 - L'IGP « Dattes Ariza Boudid de Figuig »
- 9 - L'IGP « Amande de Tafraout »
- 10 - L'IGP « Dattes Bougefous »
- 11 - L'IGP « Miel d'Euphorbe Tadla-Azilal »
- 12 - L'IGP « Pomme de Midelt »
- 13 - L'IGP « Huile d'Olive Vierge Extra Ouezzane »
- 14 - L'IGP « Miel d'Abourserj Jbel My Abdessalam »
- 15 - L'IGP « Dattes Ait Bouitib de Tata »
- 16 - L'IGP « Néfles de Zegzel »
- 17 - L'IGP « Keskés Khoumassi »
- 18 - L'IGP « Capres de Safi »
- 19 - L'IG « Huile Essentielle du Roumarin de l'Oriental »
- 20 - L'IG « Feuilles Séchées du Roumarin de l'Oriental »
- 21 - L'IG « Raisin Doukkala »
- 22 - L'IG « Noix d'Azilal »
- 23 - L'IG « Dattes Jihel d'Dras »
- 24 - L'IG « Amande du Rif »
- 25 - L'IGP « Henné d'Aït Ouabeli »
- 26 - L'IG « Figue Séchée Nabout de Taounate »
- 27 - L'IG « Coing Oued El Maâle »
- 28 - L'IG « Huile d'Olive Outat El Haj »
- 29 - L'IG « Huile d'Olive de Tafersite »
- 30 - L'IG « Miel d'Euphorbe du Sahara »
- 31 - L'IG « Lentilles de Zaïr »
- 32 - L'IGP « Figue de Barbarie Dellaâb d'Al Hoceima »
- 33 - L'IGP « Figue de Barbarie Zgûid »
- 34 - L'IGP « Curcù Beldi des Rhâma »
- 35 - L'IGP « Amande d'Amelkago - Assoul »
- 36 - L'IGP « Amande d'Arrouadi »
- 37 - L'IGP « Huile d'Olive de Seffrou »
- 38 - L'IGP « Lait de Chameche du Sahara »
- 39 - L'IG « Huile d'Olive de Zerhouna »
- 40 - L'IG « Dattes Outeoukdîm de Toudgha Tinghir »
- 41 - L'IG « Miel d'Art Attâbi »
- 42 - L'IG « Miel de Zendaz du Massif Boublâne »
- 43 - L'IG « Huile d'Olive d'Aït Attâbi »

5 Appellations d'Origine

- 1 - L'AOP « Huile d'Olive Tyout - Chadiqa »
- 2 - L'AOP « Safran de Tafouine »
- 3 - L'AOP « Rose de Kelâst M'Gouna-Dâdès »
- 4 - L'AOP « Huile Essentielle de Lavandin d'Oulmès »
- 5 - L'AOP « Huile d'Olive Vierge Extra Ghmat Aylane »

5 Labels Agricoles

- 1 - Le LA « Agneau Latton »
- 2 - Le LA « Dattes Najda »
- 3 - Le LA « Poulet Fermier »
- 4 - Le LA « Fromage de Chameche du Sahara »
- 5 - Le LA « Huile d'Olive Al Alfîya »



VALORIZATION OF AGRICULTURAL PRODUCTION

Post harvest units

Cold storage warehouses :

In 2010, the total number of cold storage warehouses was about 500 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	m ³
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

Cereal storage units :

In 2010, the cereal storage capacity in Morocco, except for flourmills and ports, reached 42 million quintals. It is distributed as follows :

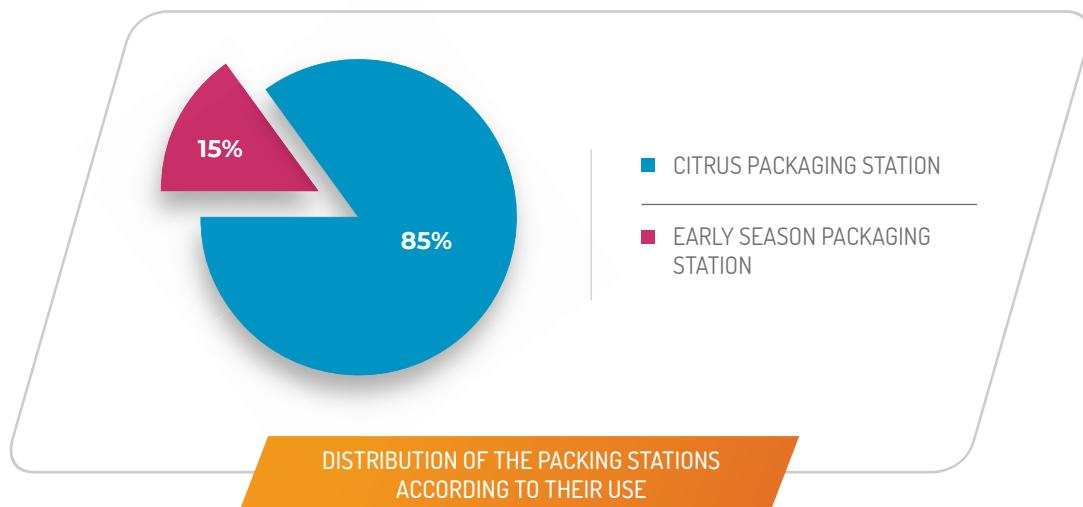
- Storehouses: 80% of units and 56% of installed capacity ;
- Silos : 6% of the units and 9% of the installed capacity ;
- Mixed warehouses, composed of silos and storehouses at the same time: 14% of units and 35% of the installed capacity.

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

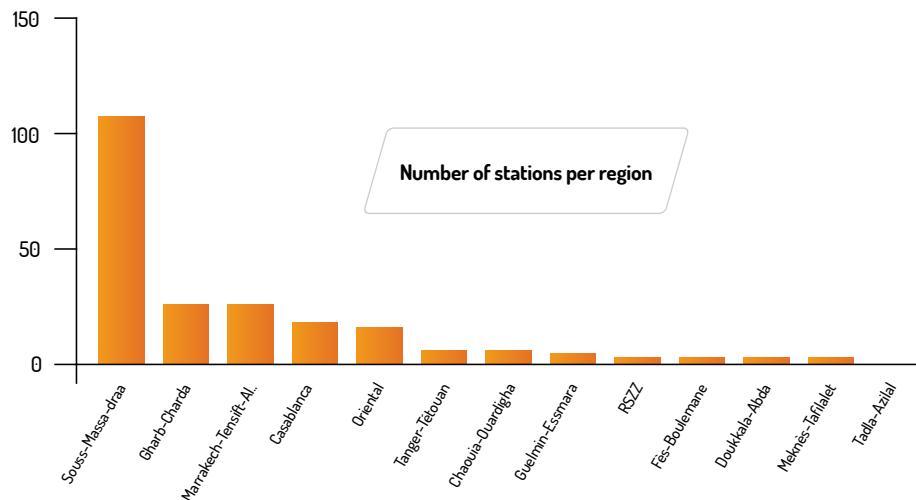
Grain traders hold almost 90% of the capacity; the remainder is held by the cooperatives.

Packing stations :

Morocco has more than 410 packing stations, of which 350 are for vegetables and fruits and 60 for citrus fruits. The use of these units is distributed below :



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 feeds, 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 meat production ;
- Poultry meat production ;
- Industrial preparation of meat products.

Fruit and vegetable industry :

- Processing and preserving of potatos ;
- 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 dirhams :

Data/Year	2004	2005	2006	2007	2008	2009	2012	2014
Production	55,4	58,3	60,9	69,7	79,4	83,1	106	107
Added value	13,1	13,3	13,8	15,3	16,6	18,3	30	30
Investment	2,6	2,7	2,6	3,5	4,4	4,45	4,5	4,2

Moreover, according to the same source, the food industry has over 2 061 companies and employs an average of nearly 150 000 people, three-quarters of them are permanent employees. The employment of women in this category represents nearly 36% of the total workforce.

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.

The Morocco Green Plan gives special attention to the industrial downstream in parallel with the efforts made for the development of agricultural upstream. Priority is given during the second phase of this plan (2015-2020) to the promotion and marketing of agricultural products.

A strategy was implemented to boost the development of the agro-food sector in Morocco. This strategy was declined to a program contract that was signed in April 2017 between the Government (MAPMDREF, MIICEN, and MEF) and professionals (COMADER, FENAGRI, FEDAM, FIFEL, INTERPROLIVE, Morocco Citrus, FICOPAM, FISA, FIVIAR, FIMALAIT, FIAC, AMIPAC, AB2C).

This program-contract aims for developing and upgrading agri-food industries, it's planned for period from 2017 to 2021 and it aims to :

- Enhance the integration between agricultural upstream and industrial downstream ;
- Develop new products with higher added value from transforming agricultural upstream production ;
- Boost and promote exports in traditional markets and develop new high-growth export markets;
- Stimulate private investment and direct it to promising products in international markets ;
- Contribute to rural development, securing and increasing farmers' income ;
- Create and stabilize jobs in the agribusiness sector and develop added value.

The current program contract relates to 7 agri-food industries which are:

- Citrus fruit and fresh fruits and vegetables industry ;
- Processed fruit and vegetables industry ;
- Olive oil industry ;
- Dairy industry ;
- Meat industry ;
- Biscuits, chocolate and confectionery industry ;
- Pasta and couscous industry.

The following axes was planned to achieve this program contract :

- Support the creation and upgrading of agricultural product derived from valorization units (packaging, cold storage, processing ...), with state subsidies varying between 10% and 30% of the cost of the investment, according to the chains value and types of units ;
- Support the export of agricultural products with amounts ranging from 500 DH to 6,000 DH / T, for both plant and animal products (fruit and vegetables, olive oil, milk, meat ...);
- Improve marketing channels for agricultural products especially meat marketing channels ;
- Support the access to export markets (CEDEAO, Middle East ...);
- Transversal measures (training, innovation standardization, sanitary control ...).

The overall cost of implementing the provisions of this program contract totals to more than 12 billion dirhams, of which 4 billion dirhams will be borne by the Government (70% by MAPMDREF and 30% by MIICEN) and 8 billion dirhams by private operators.

Regarding the socio-economic impacts, this program contract will create by 2021 :

- 38,457 additional permanent jobs (Full Time Equivalent FTE) ;
- 41.74 billion dirhams of additional annual turnover ;
- 12.52 billion dirhams of annual additional turnover to export ;
- 13.1 billion dirhams of additional annual added value.

Specific agreements are planned to sign between Government and professionals to implement the program contract. The monitoring of the program contract will be ensured by a steering committee.

A specific training program and the development of six agropoles are planned as additional accompanying measures.

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 were planned since 2009 some are completed and others under construction; 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.

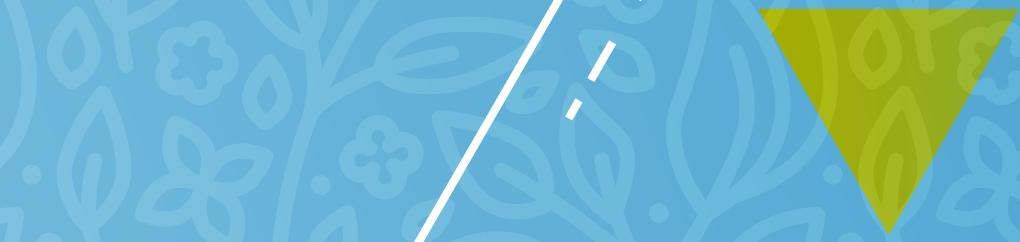


MAP OF AGROPOLES DISTRIBUTION





INVESTMENT ENVIRONMENT



AGRICULTURAL AGGREGATION DEVELOPMENT

Agricultural aggregation, one of the foundations of the MGP, is an innovative model of organization of farmers around private actors or professional organizations and allows to overcome the constraints related to the fragmentation of land structures while ensuring 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, individuals and legal entities and other professional organizations (Economic Interest Groups, cooperatives, associations ...) and aggregated farmers, in general, small and medium farmers.

The choice of such a privileged mode of organization in agriculture is driven by the following main reasons :

1. It is an attractive and competitive solution for extending the scope upstream production, facing a limited supply of rural land.
2. It optimizes the link between the market, the upstream and productive throughout the industry value chain through the following :
 - The skills and knowledge of the aggregator, particularly the knowledge of the sales markets, the adaptation capacities, and the orientation of the production supply as a result ;
 - The establishment of a direct link between the production and the destination market (s), thus avoiding the use of many intermediaries as well as the erosion of excessive margins.
3. It contributes to techniques transfer through the coaching mobilized by the aggregator teams and, if applicable, the own production units (nucleus farm) managed by the aggregator.
4. It grants an easy access to financing with better conditions for aggregated farmers.
5. It provides a fair risk sharing between aggregators and aggregated farmers because, among others, production risk is mainly supported by aggregated farmers, while marketing risk is mainly supported by aggregators. In addition, the use of appropriate insurance helps to hedge against these risks for both parties.

In order to create an institutional, legal and incentive environment for the development of aggregation projects, the state has set up many measures including the specific support to aggregation projects and the establishment of an adequate legal framework, namely :

- Law No. 04-12 on agricultural aggregation, promulgated by Dahir No. 1-12-15 of 27 Sha'ban 1433 (17 July 2012) ;
- Decree 2-12-490 of 19 Muharram 1434 (4 December 2012) made for the application of Law No. 04-12 on agricultural aggregation ;
- Joint order of the Minister of Agriculture and Fisheries, the Minister of Interior and the Minister of Economy and Finance No. 3073-14 of 12 kaada 1435 (September 8, 2014) establishing the forms and procedures for approving aggregation projects and the deliverance of the agricultural aggregation certificates ;
- Joint Order of the Minister of Agriculture and Fisheries, the Minister of Interior and the Minister of Economy and Finance No. 3074-14 of 12 kaada 1435 (September 8, 2014) fixing the amounts, rates , ceilings and procedures for subsidies granted to agricultural aggregation projects.

Aggregation projects are undertaken around upgrading units namely :

- **Citrus fruits** : packaging and / or processing unit ;
- **Olives** : crushing or canned olives unit ;
- **Fruit Trees** : cold storage and / or packaging and / or processing unit ;
- **Table grapes** : packaging unit ;
- **Date palm** : cold storage and / or packaging and / or processing unit ;
- **Vegetable crops** : cold storage, packaging and / or processing unit and a complex including a packaging unit and a freezing unit ;
- **Fall Cereals (durum wheat, soft wheat, barley)** : Seed storage and / or processing unit ;
- **Spring cereals in irrigated perimeters (rice, corn)** : grains storage and / or processing unit ;
- **Legumes** : storage and / or packaging unit ;
- **Oil crops** : crushing unit ;
- **sugar crops** : Processing unit ;
- **cereal seeds** : Packaging unit ;
- **organic citrus fruits** : Packaging unit ;
- **Organic Olives** : Crushing unit ;
- **Organic fruits and vegetables** : Packaging unit ;
- **Argan** : extraction and / or processing unit ;
- **Safran** : packaging and / or storage and / or processing unit ;
- **Perfume Rose** : processing and / or packaging unit ;
- **Beef meat** : feedlot center and / or a slaughterhouse ;
- **Sheep and goats meat** : feedlot center and / or a slaughterhouse ;
- **Camel meat** : feedlot center and / or a slaughterhouse ;
- **Cow milk** : dairy processing unit ;
- **Goat milk** : dairy processing unit ;
- **Camel milk** : dairy processing unit ;
- **White meat** : poultry slaughterhouse ;
- **Eggs** : Eggs packaging unit ;
- **Beekeeping** : honey extraction and packaging units.

These projects must meet the following eligibility standards :

- The minimum number of aggregated farmers ;
- The area / effective minimum livestock ;
- The minimum objective productivity.

Implementation process and establishment of an agricultural aggregation project

The aggregation project establishment is achieved through the following main phases :

- Elaboration and submission of the application file of the agricultural aggregation project ;
- examination of the application for the agricultural aggregation project and the approval by the Technical Committee ;
- Submission of final file of agricultural aggregation project ;
- Granting of agricultural aggregation certificates.

Elaboration and submission of the application file of the agricultural aggregation project :

Before the implementation of the project, the aggregator submits an application of prior approval of his agricultural aggregation project to the concerned Regional Directorate of Agriculture, as well as a folder containing the following six documents :

1- The aggregator identification :

- for individuals, a copy of the ID card ;
- for legal persons, copies of the legal status.

2- A file describing the aggregator's technical and managerial abilities ;

3- A file specifying the type of production concerned by the aggregation project, the location of the project (the intervention areas targeted by the project, the project location and capacity) and the support given by the aggregator in favor of the aggregated farmers ;

4- The business plan of the aggregation project ;

5- The farmers list to be associated with the aggregation project including the first name and family name, the ID card number, the province and the rural commune where the farm Associated to the aggregation project is located ;

6- the aggregation project's contract between the aggregator and the aggregated farmers that should not be less than 5 years and that must contain the mandatory clauses of the aggregation contract as specified in the 04-12 law of agricultural aggregation.

Review of aggregation project file by the Technical Committee

A Technical Committee chaired by the Director of Agricultural Regional Director or his representative shall review the aggregation project and give his opinion regarding the approval of the project.

The Technical Committee shall meet within a maximum period of 30 days after the aggregation project file has been deposited.

The decision on the approval of agricultural aggregation project, taken by the Technical Committee shall be notified to the applicant through the Agriculture Regional Directorate, in a period not exceeding 45 days after the application for approval of the agricultural aggregation project has been examined by the committee.

Submission of final file of the agricultural aggregation project

After approval of the aggregation project, the aggregator delivers the project's final file to the Agriculture Regional Directorate, this file contains :

- 1)** The aggregator's signed and authenticated commitment to achieve the aggregation project and maintain a registry of aggregated farmers ;
- 2)** Documents 3 and 4 of the approval file previously mentioned duly signed and authenticated by the aggregator ;
- 3)** The aggregated farmers final list signed and authenticated by the aggregator mentioning their identity, the location of the operation object of the agricultural aggregation contract, indicating the area or the size of the aggregated livestock ;
- 4)** A signed and authenticated copy of each aggregation contract established with the aggregated farmers in the final list.

Granting aggregation certificates Phase

Once the aggregation project's final file is received with the final specifications certificate of compliance of the aggregation project established by the ARD, the ADA assigns a national identifier for this project to be associated throughout the duration of its implementation in a national registry.

The ADA establishes the agricultural aggregation certificates for the aggregator and the aggregated farmers, these certificates are sent to the concerned Agriculture (s) Regional (s) Directorate (s).

STATE FINANCIAL AID

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 interprofessional organizations 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 source, 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 (MAPMDREF), under the heading 'Online Services', offers a multitude of benefits :

- Une rapidité et une simplification du traitement des dossiers ;
- Un travail collaboratif et un partage de l'information en temps réel entre les différents niveaux du territoire ;
- Une amélioration de la qualité des services offerts aux usagers ;
- Une traçabilité des opérations ;
- Un suivi instantané des dossiers ;
- Un contrôle des deniers publics.

UNIVERSAL SYSTEM OF SUBSIDIES :

This system is designed, according to the focus area, the following purposes :

Hydro-Agricultural Development and land improvements :

- Promoting water conservation through the adoption of efficient irrigation techniques ;
- Improved productivity and water efficiency ;
- Promoting access for small farmers to drip irrigation techniques.

Subsidies in the plants field :

- Improved agricultural equipment utilization rate per hectare ;
- Achievement of the PMV targets for mechanization ;
- Improved access for small farmers to the State aid ;
- Extension crop (date palm, olive, citrus, early vegetables ...) ;
- Increased production of fresh and processed fruit and vegetables ;
- Improved performance of upgrading units ;
- Modernization of agro-industrial fabric ;
- Increased exports and reconquest of Morocco historical position on certain markets ;
- Promotion of the exploitation of agricultural and soil.

Subsidies in the livestock sector :

- Improved performance of breeds milk and meat ;
- Modernization of dairy farms, poultry and red meat ;
- Improved productivity of livestock (milk, meat, honey ...) ;
- Development of downstream sectors of milk and red meat ;
- Promotion of animal products.

Also, prior to the completion of an investment, the applicant shall file in duplicate a prior approval application package or agreement in principle, with the unique counter which he belongs. The latter then proceeds to check for the presence of all required documents. If the file is complete, a receipt of the file (numbered and dated) is delivered to the applicant only after verification. Incomplete applications are returned to the applicant with a receipt stating the missing pieces.

Complete applications is saved by the unique counter and transmitted to the relevant technical service of the DPA or ORMVA to study and control the realization of the investment at the scene. If the investment is eligible for the subsidy of FDA, an approval certificate is drawn up by the DPA.

The overall time for processing files is as follows.

- 20 Days for Category 1 projects (drip irrigation or supplement, land development, livestock building construction, installation of anti-hail nets ...) ;
- 12 Days for projects of category 2 (citrus fruits farms and olives, producing breeding cattle and sheep, procurement of breeding goats and camels ...) ;
- 5 Days to the principle agreement for the acquisition of agricultural machinery and livestock equipment.

Then the application files, answering the required consistency, must be submitted within the predefined deadlines, varying cases of 6 months to 30 months. These are then processed by the DPA or ORMVA to release aid in an overall time limit set at 30 days.

SPECIFIC AID SYSTEM FOR AGGREGATION PROJECTS :

The state financial assistance is granted to aggregation projects as :

- 1) A preferential rates subsidies to investments in the acquisition of agricultural machinery and / or equipment in localized or supplement irrigation system ;
- 2) A lump-sum subsidy to the aggregator for the assistance and technical support granted to aggregate farmers in order to achieve the objectives set in the aggregation project.

1. Lump-sum subsidies to investments

The Lump-sum subsidies related to irrigation equipment and agricultural equipment are granted to farmers (aggregators or aggregated) on the basis of a single package lodged with the competent services of the Regional Agriculture Directorate concerned, accompanied with the aggregation certificate. This grant is paid in two parts :

- **The first installment :** based on the rates and limits fixed in the frame of the universal subsidies. This part is granted upon obtaining the aggregation certificate and after the investment fulfillment ;
- **The second installment :** calculated on the basis of rates and ceilings related to agricultural association projects, minus the amount granted in the first installment on the basis of the same grant application package.

This second installment is paid at the end of the first year once the aggregated farmers deliver their production to the aggregator; its grant is based on a discharge given to this effect by the said aggregator.

The application of the second wafer at preferential rates grant is deposited by the aggregator or aggregated at the same single window instead of filing of the application of said grant file.

2. Lump grant incentives to agricultural aggregation

Regarding the lump subsidies, it is granted in three parts on the basis of annually aggregated farmers lists provided by the aggregator and approved by the relevant services, over the first three years of delivery of the project's agricultural production as follows :

- **1st part :** 1/3, after the first year of production's delivery by the aggregated farmers ;
- **2nd part :** 1/3 at the end of the 2nd year of production's delivery by the aggregated farmers ;
- **3rd part :** 1/3 at the end of the 3rd year of production's delivery by the aggregated farmers.

Hence, during the first three years of implementation of the project, the aggregator annually provides a flat grant of encouragement to aggregation on aggregated livestock areas or numbers.

The record of lump grant application consists of the following:

- The flat-rate grant of the relevant installment ;
- A copy of the certificate of aggregation ;
- A state of nominative synthesis of information entered on the register maintained by the aggregator that will specify the aggregated who delivered their production under the last year, the total quantity delivered by associate and area or aggregated livestock who delivered their production.

The release of the lump grant is made at the end of each timeline on the basis of an observation made by the competent services of the Agriculture Regional Directorate regarding the following :

- The average yield observed on a representative sample of the aggregate ;
- A statement on the register maintained by the aggregator including which assigns delivered their production aggregated under the previous campaign, the total quantity supplied by aggregate, area / workforce aggregated livestock who delivered their production.

Thereafter, the DRA makes a finding decision realization specifying the amount of the grant to be received. This decision, signed by the Agriculture Regional Director or his deputy is sent to the concerned Regional Bank of Credit Agricole, which makes the discharge of financial assistance to the beneficiary.



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

AIDS FOR HYDRO-AGRICULTURAL DEVELOPMENTS

Operations	subsidy Rate (% of cost) and ceilings		
	Excluding aggregation and sup to 5ha	Excluding aggregation and inf to 5ha	Aggregation Projects
localized irrigation projects			
Drilling and casing of wells or boreholes			
Supply and installation of water pumping equipment			
Development of irrigation water storage basins			
Supply and installation of the equipment of the main station	80% 36000 MAD/Ha	100% 45000 MAD/Ha	100% 45000 MAD/Ha
Supply and installation of supply and distribution pipes of irrigation water			
Supply and installation of pipes and irrigation water distributors, including connection accessories			
water storage tanks	80% 16000 MAD/Ha	100% 20000 MAD/Ha	100% 20000 MAD/Ha

AIDS FOR AGRICULTURAL EQUIPMENT

Materials	Non aggregation projects		Aggregation Projects	
	subsidy Rate (% of cost)	Maximum subsidy (MAD)	Subsidy Rate (% of cost)	Maximum subsidy (MAD)
Agricultural tractor		72 000		96 000
Labor and maintenance equipment of the towed soil		17 000		22 000
Labor and maintenance equipment of the soil run by the power take-off	30%	72 000	40%	96 000
Supply equipment and organic manure spreading		48 000		64 000
Supply equipment and spreading of minerals		19 000		26 000
(simple and combined) seeding and planting equipment		48 000		67 000
Phytosanitary processing equipment for plantations	50%	60 000	70%	84 000
Phytosanitary processing equipment for arable lands other than plantations		28 000		39 000
Combine harvester	20%	208 000	30%	312 000
Self-propelled harvester for olive	30%	480 000	40%	640 000

AIDS FOR PLANT CROPS

Operations		Rate and amount of the subsidy
Plantations and creating of orchards		
	Acquisition of certified olive and almond plants, certified or common pear plants, carob, pistachio, walnut, pomegranate, cherry and medlar.	60% to 80% of the purchase price
Date palm	Acquisition of plants for the densification and rehabilitation of certified palm multipliers	100%
	Acquisition of plants for the expansion of palm plantations	70%
	Creation of homogeneous olive orchards	From 3500 to 5 000 MAD / ha
	Creation of new citrus plantations	From 4000 to 11 000 MAD / ha

AIDS FOR ANIMAL BREEDING

Aids for Animal Breeding		
Operations	Rate	Maximum subsidy
Production of selected breeders of pure sheep		700-850 MAD / head
Acquisition of Breeding Equipment		
Grinder		6 000
mixer		15 000
Livestock feed unit attached to the farm		60 000
Flail Forage Harvester		13 500
Single-Beam Maize Forage Harvester	30%	16.500
Corn Forage Harvester		42 000
Self-Propelled Maize Forage Harvester		300 000
Artificial insemination equipment		2 000
seed storage container		6 000
Pad cooling system for cage laying units		30 000

Building of Livestock Facilities		
Operations	Rate	subsidy ceiling (MAD / sheltered Head)
Modern cowshed :		
- Covered cowshed		200
- Free stall cowshed		50
traditional cowshed	25%	75
Sheep and goat farm :		
- Modern		80
- Traditional		60

PROMOTION AND DIVERSIFICATION OF AGRICULTURAL PRODUCTS EXPORTS

1- fresh vegetable products

- For citrus fruits :

Destination	subsidy amount in MAD / ton	Quantities eligible for subsidies
Russia	50*	All exported quantities
	150*	For the exported quantities exceeding the average exported quantities during the reference years (as of 1st September 2010 to 31 August 2013)
Ukraine, China and the Arab Gulf Countries	500	the quantities exported, from 1 September 2017, exceeding the quantities exported during the reference years from 1st September 2000 to 31 August 2001
Destination other than Russia, Ukraine, China, the Arab Gulf Countries and EU Member States	500	the quantities exported exceeding the quantities exported during the reference years from 1st September 2000 to 31 August 2001

(*) cumulative subsidies

- For tomatoes :

Subsidy amount in MAD / ton	Quantities eligible for subsidies
750	the quantities exported outside the European Union and exceeding the quantities exported during the reference years from 1st September 2007 to 31 August 2008

- For strawberries:

Subsidy amount in MAD / ton	Quantities eligible for subsidies
500	all quantities exported outside the European Union

2- For animal origin products :

Products	Amount of subsidy
Hatching eggs	1 MAD per kilogram exported
day-old chicks	1 MAD per kilogram exported

3- Valued Products

- For olive oil :

- Subsidy for the promotion of exports of olive oil

Catégorie	Subsidy amount in MAD / ton
All types except Lampante olive oil	2000

- Further subsidies by category for olive oil exports

Catégorie	Packaging Type	Subsidy (MAD/ton)	Conditions to receive subsidies
extra Virgin	Packaged	4000	Each exporting unit can benefit from subsidies for 3 export campaigns during the period from 2017 to 2021.
	Without packaging (bulk)	2000	
Virgin	Packaged	3000	This aid is additional to the aid provided in 1-a above.
	Without packaging (bulk)	1000	
Ordinary virgin	Packaged	2000	In case of packaging, olive oil must be stored in containers with a storage volume less than or equal to 5 liters.
Refined	Packaged or unpackaged (bulk)	1000	

- For packaged table olives :

- Promoting exports of table olives :

Type of preparation	subsidy amount in MAD / ton	Conditions to receive subsidies
Whole olives (except «Greece»), or broken, or sliced in hermetically sealed containers of 5 kg and less	1000	Subsidies for the quantities exported exceeding the average of the quantities exported during the reference years 2014 and 2015.
Olives in slices, or stuffed, or pitted, or «Greece» whole in hermetically sealed containers of 5 kg and less	1500	Each exporting unit can benefit from the subsidies for 3 export campaigns during the period from 2017 to 2021.
Cracked olives «Greece» in hermetically sealed containers of 5 kg and less	2000	

- For the diversification of export markets for table olives :

Type of preparation	subsidy amount in MAD / ton	Conditions to receive subsidies
All types of table olives packaged in hermetically sealed containers of 5 kg and less	750	Subsidy granted to total volumes produced outside the following markets: France, Belgium, the Netherlands, Luxembourg, Spain, Italy and Greece Subsidies for exports made during the campaigns from 2017 to 2021. This aid is additional to that in the above 2-a.

- For packaged or frozen apricots :

type of packaging	subsidy amount in MAD / ton	Conditions to receive subsidies
Canned apricot without sugar packaged in hermetically sealed container of 5 kg or less	1000	Subsidies for the quantities exported exceeding the average of the quantities exported during the reference years 2014 and 2015 for packaged and frozen apricots.
Frozen apricot packaged in 20 kg or less		Each exporting unit can benefit from the subsidies for 3 export campaigns during the period from 2017 to 2021.
Canned apricot with sugar packaged in hermetically sealed container of 5 kg and less	1500	

- For other added-value products :

products	Packaging Type	subsidy amount in MAD / ton	Quantities eligible for subsidies
Capers - Pickles - peppers -any other fruits and vegetables	Packaged in hermetically sealed containers of 5 kg and less	2000	This subsidy is granted for the quantities exported during the campaigns from 2017 to 2021 and exceeding the average of the quantities exported during the reference years 2014 and 2015.
Tomato products:	Tomato concentrate Peeled tomato Crushed Tomato		
Dried tomato Tomato powder	Packaged in hermetically sealed containers of 25 kg and less		
Dried fruit and / or dehydrated: - Almonds - Nuts - Dates - Dried plums - Dried apricots - Dried figs - Raisins - All other dried fruits and / or dehydrated	Packaged in hermetically sealed containers of 5 kg and less	2000	This subsidy is granted for the quantities exported during the campaigns from 2017 to 2021 and exceeding the average of the quantities exported during the reference years 2014 and 2015.
Aromatic and medicinal plants	Packaged in hermetically sealed containers of 1 kg and less	2000	This subsidy is granted for the quantities exported during the campaigns from 2017 to 2021 and exceeding the average of the quantities exported during the reference years 2014 and 2015.
Spices	Packaged in hermetically sealed containers of 5 kg and less	2000	This subsidy is granted for the quantities exported during the campaigns from 2017 to 2021 and exceeding the average of the quantities exported during the reference years 2014 and 2015.

- For poultry products :

Products	subsidy amount in MAD / tonne	Quantities eligible for subsidies
Preparations of poultry meat and offal	1500	Each exporter will benefit from this subsidy for 3 exports campaigns during the period from 2017 to 2021.
Frozen poultry meat and edible offal	1000	

- For milk products :

Produits concernés	Montant de l'aide en Dirhams/Tonne	Conditions permettant de bénéficier de l'aide
Finished dairy products: - Milk creams Fats from milk - Yoghurt - Milk fermented and acidified - Fermented and acidified creams - Powdered whole milk - Skimmed milk powder - Concentrated milk - UHT milk - Cheese	500	Subsidies given to the exporting unit for 3 export campaigns from 2017 to 2021.

AIDS FOR VALORIZATION UNITS

1- Plant production

Unit Type	Subsidy rate (in%)	Ceiling of the subsidy (MAD)
Seed packaging units: building and equipping the units	10%	1,500,000
Cereal storage units: building and equipping silos	10%	3,200,000
Citrus packaging units: building and equipping the units	30%	6000000 for a capacity of less than 5,000 T/year 14.000.000 for a capacity from 5,000 T/year to less than 10,000 T/year 21.000.000 for a capacity of 10,000 T/year and more
Vegetables, arboricultural products and fresh fruits (except citrus) packaging units: building and equipping the units	30%	4.000.000 for a capacity of less than 4,000 T/year 10.000.000 for a capacity from 4,000 T/year to less than 10,000 T/year 15.000.000 for a capacity of 10,000 T/year and more

Construction and equipment of refrigerated storage units for agricultural products	25%	3,000,000
Construction and equipment of refrigerated storage units for dates	25%	800,000
Construction and equipment of olives crushing units	10%	2,000,000
Construction and equipment of modern bottling olive oil units	10%	1,000,000
Bottling olive oil equipment	10%	500,000
Construction and equipment of treatment and optimization units for olive pomace	10%	1,500,000
Construction and equipment of valorization units for plant production by processing and/or preserving and/or freezing-refrigerating and/or drying and/or crushing and/or oils (except olive oil) extraction and essential oils, including the packaging	20%	2,000,000

2- Animal production

Unit Type	Subsidy rate (in%)	Ceiling of the subsidy (MAD)
Construction of fresh milk optimization units for the production of cheese and dairy products	30%	3,000,000
Construction of an industrial slaughterhouse of red meat with a cutting room	30%	18,000,000
Construction and equipment of Red meat cutting units	30%	4,500,000
Construction and equipment of red meat processing units	30%	4,500,000
Equipment for red meat processing units	30%	600,000
Construction of an industrial poultry slaughterhouse with cutting room	30%	12,000,000
Construction of poultry meat cutting units with or without processing, including packaging	10%	3,000,000
Construction of consumer egg packaging units	10%	600,000
Construction and equipment of consumer egg processing units	10%	2,200,000
Construction and equipment of drying units for poultry droppings	30%	600,000
Construction of apicultural products valorization units	10%	500,000

3- Milk collection centers

Unit Type	Subsidy rate (in%)	Ceiling of the subsidy (MAD)
Construction and equipment of milk collection centers	30%	130,000MAD for milk containers
		200 000 MAD for the generator or the electrification of the milk collection center
		200 000 MAD for the construction of the milk collecting center

LUMP SUM SUBSIDIES FOR AGGREGATION PROJECTS

Agricultural aggregation project type	Subsidy amount (MAD / Ha or head or tonne)
Aggregation project of citrus fruits around a packaging and/or processing unit	1 500 Dh/ha
Olive tree aggregation project around a grinding up unit	Fallow land: 450 MAD / ha Irrigated: 1100 MAD / ha
Olive tree aggregation project around an olive canning unit	Fallow land: 250 MAD / ha Irrigated: 650 MAD / ha
Aggregation project of fruit arboriculture around a refrigerated storage and/or packaging and/or processing unit	1 500 MAD/ha
Table grape Aggregation project around a packaging unit	1 500 MAD/ha
Date palm aggregation project around a packaging and/or refrigerated storage and/or processing unit	3 000 MAD/ha or 3 000 MAD/80 feet
Aggregation project of vegetable crops around a refrigerated storage unit	3 500 MAD/ha
Aggregation project of vegetable crops around a packaging and/or processing unit	3 500 MAD/ha
Aggregation project of vegetable crops around a complex incorporating a packaging unit and deep freezing unit	3 500 MAD/ha
Winter cereals aggregation project (durum wheat, soft wheat, barley) around a grain storage and/or processing unit	Fallow land: 400 MAD / ha Irrigated: 550 MAD / ha
Aggregation project of irrigated spring cereals (rice, corn) around a grain storage and/or processing unit	Rice: 800 MAD / ha Corn: 550 MAD / ha
Legume aggregation project around a storage and/or packaging unit	500 MAD/ha
Aggregation project of oil-producing crops around a grinding-up unit	1 955 MAD/T
Aggregation project of sugar crops around a processing unit	550 MAD/ha
Aggregation project of cereal seeds around a packaging unit	650 MAD/ha
Aggregation project of organic citrus fruits around a packaging unit	2 000 MAD/ha

Aggregation project of organic olive trees around a grinding-up unit	950 MAD/ha
Aggregation project of organic vegetable crops around a packaging unit	4 000 MAD/ha
Argan aggregation project around an extraction and/or processing unit	3 400 MAD/ha
Saffron aggregation project around a packaging and/or refrigerated storage and/or processing unit	5 000 MAD/ha
Aggregation project of perfume rose around a processing and/or packaging unit	5 000 MAD/ha
Aggregation project of bovine red meat around a feedlot and/or slaughterhouse unit	350 MAD/tête
Aggregation project of ovine and caprine red meat around a feedlot and/or slaughterhouse unit	28 MAD/tête
Aggregation project of camel red meat around a feedlot and/or slaughterhouse unit	800 MAD/tête
Cow milk aggregation project around a dairy processing unit	280 MAD/tête
Goat milk aggregation project around a dairy processing unit	50 MAD/tête
Camel milk aggregation project around a dairy processing unit	900 MAD/tête
Aggregation project of white meat around a poultry slaughterhouse	1 000 MAD/tonne
Egg aggregation project around an egg packing unit	750 MAD/tonne
Apiculture aggregation project around a honey extraction and packaging unit (honey house)	7 500 MAD/tonne

However, the comprehensive list of subsidies to various investment and approval procedures of these subsidies are detailed in the brochure of the Agricultural Development Fund (FDA-April 2018), which is available on the website of the MAPMDREF : www.agriculture.gov.ma or the ADA website: www.ada.gov.ma

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
Crédit Agricole du Maroc Group	20
Banque Populaire Group	20
Crédit du Maroc	3.3
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 that have been 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 ;
- Direct funding of the aggregated by aggregators ;
- Joint ventures combining multiple stakeholders with a view to an alliance building on their strengths.

CROPS INSURANCE :

1. Comprehensive Climate risk insurance for cereals, legumes 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 :

Zone	Guarantee level	eligible area	types of crops Cereal / legume
Zone 1 : unfavourable in rainfed	600 MAD/ha	All of the areas	Cereals and legumes
Zone 2 : moderately favourable in rainfed	900 MAD/ha	All of the areas	Cereals and legumes
Zone 3 : Favourable in rainfed and irrigated area	Level 1 : 1 450 MAD/ha	All of the areas	All kinds of insurable crops
	Level 2 : 2 900 MAD/ha	Area Greater than or equal to 10 ha	All kinds of insurable crops
Zone 3 : Favourable in rainfed and irrigated area	Level 3 : 4 350 MAD/ha	Area Greater than or equal to 20 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower
	Additional level Level 4 : 6000 MAD/ha	Area Greater than or equal to 100 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower
Zone 3 : Favourable in rainfed and irrigated area	Additional level Level 5 : 8000 MAD/ha	Area Greater than or equal to 100 ha	Soft wheat, durum wheat, maize, rapeseed and sunflower

For the rural communes within zones 1 and 2, a **minimum guaranteed compensation** amount of 300 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 1 of each year until December 15 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 : 600 MAD/Ha	90%	16 MAD/Ha
Moderately favourable rainfed zones : 900MAD/Ha	90%	22 MAD/Ha
Favourable rainfed zones and irrigated zones : <ul style="list-style-type: none"> • Level 1 : 1.450 MAD/Ha • Level 2 : 2.900 MAD/Ha • Level 3 : 4.350 MAD/Ha 	90% 68% 57,3%	26 MAD/Ha 199 MAD/Ha 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 MAMDA.

2. Fruit growing comprehensive climate risk guarantee program

- Insurable Productions: pome rosacea (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.

Subscription period :

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)**

The capital guaranteed is the amount of the production expenses incurred by the farmer. However, this capital may not exceed the ceiling fixed below by type of harvest :

Crops	Ceiling of capital guaranteed In MAD/Ha
Apple and pear	34 500
Quince	19 500
Stone rosaceae (apricot, plum, peach, nectarine and cherry)	13 700
Citrus : small fruits	35 000
Citrus : Oranges	28 700
Rainfed olive	3 400
Irrigated olive (density <285 seedlings/ha)	7 600
Olivier Irrigué (density >= 285 seedlings/ha)	11 500
Rainfed almond	5 700
Irrigated almond (density< 330 seedlings/ha)	8 600
Irrigated almond (density >= 330 seedlings/ha)	15 000
Pomegranate	15 600
Rainfed fig	2 100
Irrigated fig	5 700

- Amount of contributions : **Contribution (MAD) = Capital guaranteed (MAD) x Subsidized contribution rate (%)**

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%

- Rate of subsidy to contribution : adjusted in accordance with the guaranteed area
- Subsidized contribution rate - **Variable according to the Province where the farm is located**

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

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 hays. It also covers fire damages caused to neighbours and third party ;
- vehicles 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 hays or on the stump.

Hail insurance

It covers the production of the farmer against the quantitative and qualitative damages 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)...

Comprehensive Agro-industrial multi risk 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.

Farmer personal incident 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

PARTENARIAT PUBLIC PRIVÉ AUTOUR DES TERRES AGRICOLES

Operation Framework :

The operation of the public-private partnership on the state 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 with long-term contracts for leasing agricultural lands through calls for tenders. The partner on his/her part engages to implement the project subject to his/her offer and to take charge of the employment of the workers that were previously working on the same farmland.

Methods of implementation :

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

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 bidder surrounds him/herself with an agricultural expertise.

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

- The establishment of a company under private law in which the successful bidder 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 of the assigned project 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 investment amount projected in the offer, for the medium and large scale agricultural projects (area above 20 ha) ;
 - 2.5% of the total investment amount projected in the offer for small agricultural projects.
- The payment receipt of the partner showing the amount of the first annual rent ;
- A bank debit authorization of rent as well as 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 for projects regarding fruit trees and vineyards, as well as the projects integrating agro-industrial infrastructures ;
- 25 years for projects on animal breeding. 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 for 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 bidders is operated by a technical inter-ministerial committee chaired by the Agency for Agricultural Development (Ministry of Agriculture, Maritime Fisheries, Rural Development, Water and Forests) and the representatives of the following departments :

- Ministry of Agriculture, Maritime Fisheries, Rural Development and Waters and Forests ;
- Ministry of Interior ;
- Ministry of Economy and Finance ;
- Moroccan Agency for Investment and Exportations' Development.

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

	LSAP ¹	MAP ²	SAP ³
Bidder's references	25	30	30
Technical, economic, and financial coherence of the project	20	25	35
Level of investment	15	15	25
Aggregation	20	5	-
Degree of upstream-downstream integration of the project	5	10	-
Employment	15	15	10

¹ LAP : Large scale agricultural projects ($\geq 100\text{ha}$)

² MAP : Medium agricultural projects ($> 20\text{ha}$ and $< 100\text{ha}$)

³ SAP : Small agricultural projects ($\leq 20\text{ha}$)

DELEGATED MANAGEMENT FOR 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 99% as collection performance for 2017).

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 3200 ha. The delegation agreement was signed in 2013 and the works of construction of irrigation infrastructures are running by the delegated service provider.

Other projects will emerge, in the short term, within the framework of the PPP in irrigation especially for operating the perimeter of Kaddoussa (5.000 ha), the extension and modernization of lotl of Gharb on 30.000 ha and the 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 initiated. 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 scarcity ...).

As an illustration, MAPMDREF (Ministry of Agriculture, Maritime Fisheries, Rural Development, Water and Forests) launched in June 2017 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 15.000 ha in the plain of Chtouka (Region of Souss Massa).

A second project of PPP in irrigation by desalination has been identified in the region of Dakhla, Oued Ed-Dahab on an area of 5000 ha. The MAPMDREF has launched a call for tenders for choosing a delegated service provider for the production of desalinated water and the management of the irrigation perimeter in October 2017. The contracts signature planned in 2018.



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 is a natural or legal person, whether he is Moroccan or foreigner, can conclude leases of agricultural land from private owners for any duration that suits him/her, except in the case of agricultural lands located within the demarcated irrigation perimeters. Within these perimeters, leases are in fact governed by the provisions of Articles 32 to 34 of the Dahir No.1- 69-25 forming the Agricultural Investment Code.

The investor can then rent a farm land 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 mandatory to be aware of the legal situation of the property and to verify if it is not burdened with charges. Moreover, it is advisable to establish authentic contracts with notaries or Adouls (Muslim notaries), legalize signatures, and to register them at the stamp and registration services within 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 leasing of the properties may be offered.

PROPERTY ACQUISITION FOR THE EXECUTION OF AGRICULTURAL PROJECTS :

Under the Dahir No.1-73-645 of April 23, 1975, regarding the acquisition of agricultural lands or those with agricultural capabilities located outside the urban areas, foreign natural and legal persons as well as the Joint-stock companies cannot acquire agricultural properties.

OPTIMIZATION OF TECHNICAL CHOICES :

The 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 150 mm for very deep soils.

For this, maps of agricultural capability of land are available from INRA. They cover 6.000.000 hectares, for the main crops in Morocco.

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

Unfavourable areas of Morocco, especially Tangier, Tetouan, Rif, Pre-Rif, Meknes region, Middle Atlas, Taza, Atlantic coast in the north of Rabat, the soils have an available water capacity of 100 mm in an average year. Hence, the growth period exceeds 150 days and reaches up to 270 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 :

- Cereals' production: 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 2.8% ;
- Oilseed production: creation of four sunflower varieties adapted to agro-ecological conditions of production areas and two varieties of COLZA with low erucic acid ;
- Citrus production: five new clones of orange, juicy, with a suitable calibre for export and long 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 production: a first variety which is resistant to Bayoud and has a high commercial quality has been created ;
- Olive production: 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 ;
- Fruit trees' production: 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 ;
- Cactus production: 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 ;
- 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 technical sheets, covering the main crops produced 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 MAPMDREF, INRA, OCP Group, IAV and the 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 local commune ;
- 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.

Regarding agricultural consulting, recommendations are provided in terms of soil fertilization needs depending on the chosen crop and the expected yield.

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

ENGAGING THE DIRECT COSTS OF PRODUCTION :

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 costs :

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 competencies, 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 MAPMDREF (ministry of agriculture, maritime fisheries, rural development, water and forests)). The rates applied, VAT included, are shown, for information purposes 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 (Dahir 1-69-25). The rates applied in Large Hydraulics perimeters are as follows :

ORMVA	Perimeter/ Ratearea	Tariff (MAD / m³)
Gharb	Behtwithout lift	0,32
	Behtwith lift	0,38
	Gravitational PlaineGharb	0,38
	GharbPlainsprinkle	0,60
Souss-Massa	Massa	0,77
	SoussUpstream	0,74
	Issen Modern	0,70
	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 and Ext Faregh and S.Smail	0,51
	High Service	0,44

	RmelDrader	0,69
Loukkos	Plainandlow hills	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
	PerimeterofGaret	0,67
Tadla	Tadla	0,28
	CentralHaouz	0,35
Haouz	Tessaoutupstream	0,31
	Tessaoutdownstream	0,30
Tafilalet	Tafilalet	0,24
Ouarzazate	Ouarzazate	0,24
Oued Mellah	Oued mellah	0,28

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

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 prices 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 :

Roads and highways' transport :

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

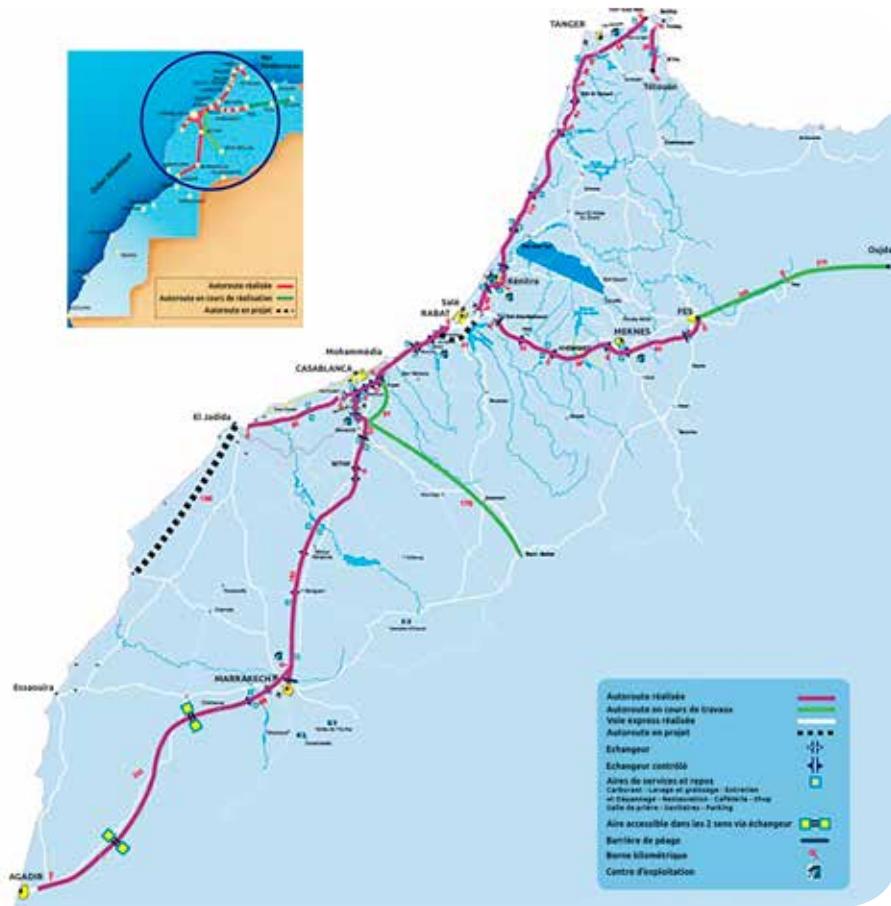
The Ministry of Equipment and Transport (MET), as manager of the aforementioned network, ensures its construction and maintenance. The said network is composed, according to the major categories, of the following :

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 considerable increases 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>

On a different note, the execution and management of the Moroccan highway 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 1800 km connecting the major cities of the country (Rabat - Tangier, Rabat - Fez, Rabat - Casablanca - Marrakech Agadir and Fez - Oujda, Casablanca-BeniMellal, and Casablanca-El Jadida-Safi). Moreover, 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 along with the update of the national highway reinforcement scheme by 2030 and which will provide new links for the implementation of new sections for more than 800 Km.

Carte du réseau autoroutier marocain



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. In 2016, the road traffic registered a growth of +6% to reach a national index number of traffic of 99 million vehicles (km/d) in the overall roads and highways network.

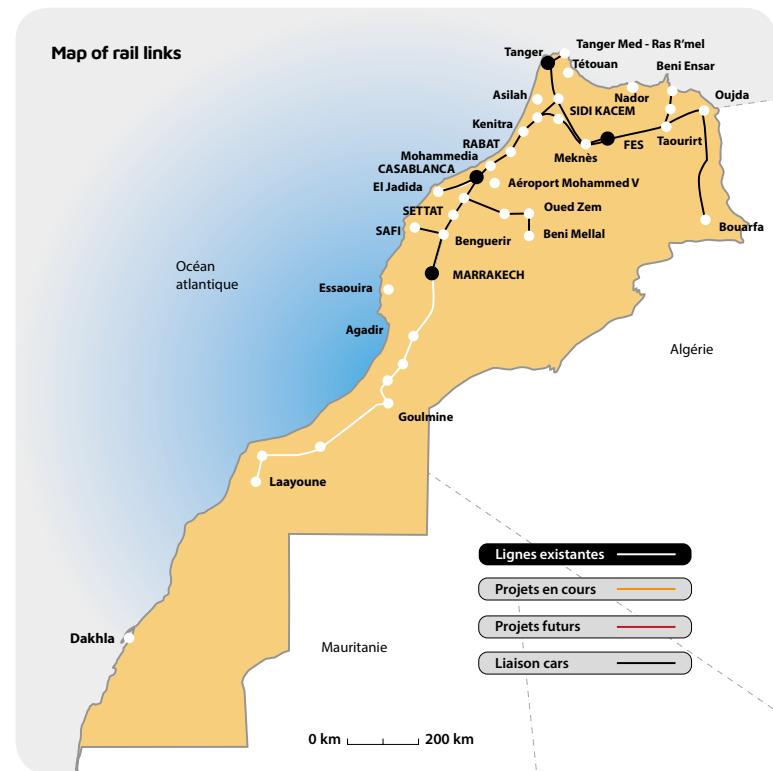
And finally, regarding the base price per kilometric ton for the transport of goods, it is around 0,40MAD / t / km. This rate may be subject to change depending on the distances and the condition of roads to take.

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 (40 million passengers in 2016), the National Office of Railways (ONCF) provides mainly the transport of phosphates, minerals, chemicals and fertilizers. In 2016, freight traffic was around 28.2 million tons.

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 0.404MAD/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 rates for the 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 1500 km.

Initially, these two high-speed lines will be operating. The first, in the north, will link Tangier to Casablanca in 2013 and the second, in the south, will link Marrakech to Casablanca.

Air transport :

The airport infrastructure in the country has 27 airports. Over the period 2007-2012, a program, of nearly MAD 10 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.

Maritime transport :

With a coastline of nearly 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 /t and to the United States of America and Canada MAD 1.5 thousand /t.

Other data regarding the 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. 169-25 of 10 Jumada I 139 (25 July 1999) 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 ...

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 including animal breeding products (seeds, embryos, hatching eggs, ...), animal products, by-products animals 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 :

- Law No. 24-89 and its implementing decree enacting veterinary animal health measures for the importation of animals, animal products, animal propagation products and seafood products and fresh water ;
- The aforementioned Law 28-07 on the health safety of food and its implementing texts ;
- The Dahir of Shawwal 24,1397 (October 8, 1977) relating to the health and quality control of animal products and products of animal origin and the texts for its application ;
- The law No. 13-83 promulgated by Dahir No. 1-83-108 of Moharram 9, 1405 (October 5, 1984) 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 negotiation of sanitary conditions to establish models of veterinary health certificates for the import of live animals including animal propagation products (seeds, embryos, hatching eggs, ...), animal products, by-products animals and animal feed ;
- 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 labeling and their presentation in the sales outlets and this in accordance with the regulation in force ;
- Corrective 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 Current regulations.

Prior authorization or License of institutions :

The authorization or license 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 license in terms of health should be sent to the local veterinary service of the location of the unit.

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

The health license for quarantine stations for the quarantine of certain animal species (cattle, sheep, and 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 license 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

Contrôles sanitaires vétérinaires à l'importation et à l'exportation :

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 24-89 promulgated by Dahir No. 1-89-230 of Rabia I 44, 1414 (September 10, 1993) enacting veterinary health measures on imports of animals, animal products, products of animal origin, animal propagation products and seafood and freshwater, and Decree No. 2-89-597, of rabia II 25, 1414(2 October 12, 1993) issued for the application of the above mentioned Law No. 24 – 89 ;
- The above law 28-07 of February 11, 2010 regarding the safety of food and Decree No. 2-10-473 of Shawwal 1432 (September 6, 2011) 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 (PIF), including the Control and Quality Directories (DCQ) whose list is fixed by joint ordinance of the Minister of Agriculture and Agricultural Development and the Minister of Finance and Foreign Investment No. 1726-96.

For any application for import or export control, the operator or his representative should contact the veterinary service concerned of the ONSSA (Provincial Veterinary Service (SVP), DCQ or PIF) 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).

ii) 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: Labeling 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.

Authorization of poultry units :

Authorization of poultry units is governed by :

- Law No. 49-99 Law No. 49 99 relating to the health protection of poultry farms, the control of the production and marketing of poultry products, promulgated by Dahir No. 1-02-119 of rabii II 1st, 1423 (June 13, 2002), and Decree No. 2- 04-684 of December 27, 2004 ;
- The ordinance of the Minister of Agriculture, Rural Development and Maritime Fisheries No. 2124-05 of December 15, 2005 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 centers 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. 2125-05 of December 15, 2005 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. 2126-05 of December 15, 2005 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. 2127-05 of December 15, 2005 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. 2129-05 of December 15, 2005 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.

Authorization to carry out the poultry breeding activity must be sent to the local veterinary service of the establishment link of the unit that is the subject of the application before any set-up of a batch.

CONFORMITY AND HEALTH CONTROLS OF PLANT PRODUCTS AND PRODUCTS OF PLANT ORIGIN FOOD ADDITIVES AND FOOD SUPPLEMENTS

Conformity and health control of plant products and products of plant origin food additives and food supplements are governed by the following laws and regulations including :

- The law 28-07 regarding the health safety of food and its implementing texts, promulgated by the Dahir No. 1-10-08 of 26 Safar 1431 (February 11, 2010) and the texts taken for its application ;
- The law 13-83 promulgated by Dahir No. 1-83-108 of moharram 9, 1405 (octobre 5, 1984) on the prevention of goods fraud and the texts for its application ;

In application of those texts, the action of the control services of plant and vegetable products lead to :

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

- The licenses 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 license 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 licenses 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, and 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..

3. Control of regulatory conformity (quality, and health security) of plant products and products of plant origin, food additives and food supplements :

These controls, made in local market, import and export, consist of :

- Collection of samples and their analysis in official laboratories ;
- Direct finding and ascertainment when it comes to the operations of checking of the labeling, 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.

3.1 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 or his representative submits an application for sanitary certification to the control service of plant products and plant origin local plant location of the establishment.

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 :

1st step : The documentary check: consists of verifying the form and content of health documents to ensure the admissibility and conformity of the application and the accompanying file.

2nd step : 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 a representative sample of 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.

3rd step : Analytical control :

This involves sampling, which takes place 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.

3.2 Health and conformity control during import :

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

1st step : 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).

2nd step : Identity check :

It is a control that consists in checking the concordance between the elements identifying the imported product and the sanitary documents that accompany it.

3rd step : physical check :

This control consists in :

- physically inspecting the goods and their packaging ;
- Check, as appropriate, the conveyance and the temperature ;
- Verifying the conformity of the labeling and presentation.

To ensure the conformity of the goods, samples are taken for analytical investigations. The use of analytical investigations according to the approach of health risk analysis is related to the nature of the imported goods.

This check is carried out on a representative sample of each batch of the imported goods in order to carry out the necessary verifications in accordance with the regulations in force. Sample taking shall be carried out in the presence of the importer or his representative and, where appropriate, a customs officer.

Information on the practical arrangements and the sanitary conditions required for the import of the above-mentioned animals and products are published on the ONSSA website in the import / export section www.onssa.gov.ma

It should be noted that there are specific procedural codes at the level of this heading and made available to operators for the importation of live animals and animal propagation products from the authorized countries according to the animal species.

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 Rosacea 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 :

www.onssa.gov.ma

CONTROL OF SEEDS :

Production, control, certification and marketing of seeds are governed by the provisions of Dahir No.169-19 of 25 July 1999, as amended by the Dahir No.176- 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. 966 93 of 20 April 193, as amended by ordinance No. 3828 94 of 9 November 194 laying down the conditions for the import of seeds and plants.

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.

He 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 (Organization 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 10 0 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 labeled 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/fr/reglementation/reglementation-sectorielle/vegetaux-et-produits-dorigine-vegetale/sementes-et-plants/production-et-commercialisation-des-sementes-et-plants

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. 1-69-169 of 10 Jumada I 10, 1389 (July 25, 1969), as amended by the Dahir as law No. 1- 76-472, Shawwal 05, 1397 (19 September 19, 1977) 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, sugarcane, argan, saffron bulbs and fig tree, perfume rose, pomegranate, red fruit species (strawberry, raspberry, blueberry, blackberry, gooseberry and blackcurrant) ;
- The order No. 966-93 of April 20, 1993, as amended by Decree No. 3828-94 of November 9, 1994, 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/fr/reglementation/reglementation-sectorielle/vegetaux-et-produits-dorigine-vegetale/sementes-et-plants/production-et-commercialisation-des-sementes-et-plants

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.353 of july 16, 2013.

Variety registration :

The registration of the varieties is governed by the provisions of Dahir No.1-69-169 of july 25, 1969, as amended by the Dahir No.1-76-472 of september 19, 1977 and its implementing texts set out below :

- Order No. 863-75 of September 22, 1977 laying down the conditions for registration of varieties in the official catalogue ;
- Order No. 864-75 of September 22, 1977 amended and supplemented by Order No. 3538-13 of December 04, 2013 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

Plant Variety Protection :

The law 9/94 related to the Protection of Plant Varieties was promulgated by Royal Decree No.1-96-255 of January 21, 1997. This law complies with the provisions of 1991 Convention of the International Union for the Protection of Varieties of Plants (UPOV).

The law came into force on October 28, 2002, date of publication of the application texts listed below :

- Decrees No. 201-2324 and No. 201-2325 of march 12, 2002 ;
- 5 ordinances No. 1578-02, No.1579-02, No.1581-02, No.1580-02 and No.1582-02 of September 16, 2002 and ordinances No. 785-16 of March 25, 2016.

These regulations are available at the web address:

<http://www.onssa.gov.ma/fr/reglementation/reglementation-sectorielle/vegetaux-et-produits-dorigine-vegetale/semences-et-plants/protection-des-obtentions-vegetales>

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

IMPORT AND MARKETING OF SEEDS AND SEEDLINGS :

The importation and marketing of seeds and seedlings are regulated by Decree No. 966- 93 of April 20, 1993. 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 ;
- However, the foregoing provisions do not apply to seeds imported under the temporary admission procedure; these seeds can't be marketed within the country ;
- 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. 1-76-472 of September 19, 1977.

The decision of the Minister of Agriculture and Maritime Fisheries No. 353 of July 16, 2013 stipulates, for the granting of licenses 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 plants ;
- The institutions must have a trade register and articles of association, specifying a marketing activity of seeds and/ or plants ;
- The institutions agree to participate in the promotion of the sector of seeds and plants.

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 license 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

Charges for services rendered :

Charges for services rendered by ONSSA for the registration of varieties, protection of plant varieties, the granting of licenses, 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 des prestations)

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 December 2nd, 1922 regarding regulation on the import, trade, possession and use of poisonous substances ;
- Law No. n°42-95, promulgated by Dahir No. 1 - 97-01 of Ramadan 12, 1417 (January 21, 1997) relating to the control and organization of trade of pesticide products for agricultural use as it was amended and supplemented by law No. 32-00 amending and supplementing law No. 42-95 promulgated by Dahir No. 1 - 97-01 of Ramadan 12, 1417 (January 21, 1997) ;
- Decree No. 2-99-105, of Moharram 18, 1420 (May 5, 1999) pertaining to the approval and registration of pesticide products for agricultural use and Decree No.2-99-106 of May 5, 1999 relating to the exercise of activities of import, manufacture and marketing of agricultural pesticides ;
- Decree No. 2-01-1343 of Jourmadall 28, 1422 (September 17, 2001) 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 MAPMDREF (**The Ministry of Agriculture, Maritime Fisheries, Rural Development and Waters and Forests**) after preliminary verification related to competence of the stakeholders and the quality of local use.

And in accordance with the 28-07 law enacted by Dahir No. 1-10-08 of Safar 26, 1431 (February 11, 2010) related to the health safety of food products, and the ordinance of the Minister of Agriculture and Maritime Fisheries No. 1129-13 of Jounada I 21, 1434 (April 2nd, 2013) 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:8082/>

REGISTRATION OF VETERINARY INPUTS AND DRUGS :

The Division of Pharmacy and Veterinary Inputs is responsible, under the authority of the Director of Inputs and Laboratories, for ensuring control of the pharmacy and veterinary inputs.

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

- Dahir No. 1-80-340 of Safar 17, 1401 (December 26, 1980) promulgating Law No. 21-80 related to the private practice of veterinary medicine, surgery and pharmacy ;
- Decree No. 2-82-541 of Jounada I 29, 1403 (March 15, 1983) issued for the implementation of Law No. 21-80 ;
- Joint Circular No.1/94 related to the establishment of the applications for authorization for the marketing of medicinal products for veterinary use ;
- Joint Circular No. 834 of June 07, 2007 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. 28-07 relating to the sanitary safety of food and its implementing decree ;

- The order of the Minister of Agriculture and Maritime Fisheries No. 1490-13 of May 3rd, 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=456&Itemid=328

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. 1-11-117 of Hija 25, 1432 (November 22, 2011), completing and amending the Dahir of Ramadan 9, 1331 (August 12, 1913) 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 bought 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 (National Agency for the Land Conservation of Cadastre and Cartography) : 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 MAPMDREF :

www.agriculture.gov.ma

GENERAL NORMATIVE AND LEGAL FRAMEWORK

INVESTMENT CHARTER :

The investment in Morocco, particularly in agro-industry, is governed by the Framework Law No. 18-95 promulgated by Dahir No.195-213 of jounada II 14, 1416 (November, 8th 1995) 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. 47-06 promulgated by Dahir No.1-07-195 of kaada 19 ,1428 (November 30, 2007) 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 EXCHANGES 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.

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. 17-95 promulgated by Dahir No. 1-96-124 of rabii II 14, 1417 (August 30, 1996) relating to the public limited companies, as subsequently amended and supplemented, particularly by law No. 20-05 of jounada 117, 1429 (May 23, 2008). The other forms of companies are governed by Law No. 5-96 promulgated by Dahir No. 1-97-49 of chaoual 05th, 1417 (February 13, 1997), 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. 24-10 of jounada II 29, 1432 (June 2nd , 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. 112.12 of December 18, 2014 promulgated by Dahir n°1 - 83 - 226 of moharram 9, 1405 (October 5, 1984), 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 :

1. Application for name approval: made with the ODCO, it is (signed by at least 5 people (physical or moral), the ODCO grants a certificate of approval of the name of the cooperative ;
2. Procedures of constitution: Signing of the statute by all the members, subscription to the capital and evaluation of the units, if necessary, and payment of the paid-up capital with a banking institution ;
3. Receipt of the local administrative authority: deposit of the file of the cooperative at the level of the local administrative authorities against a receipt. This file includes the following parts :
 - The status of the cooperative signed by the constituent members and approved by the competent authorities ;
 - List of cooperative members with subscribed units and capital as well as paid-up capital ;
 - Copies of identity documents of all members as well as agents of administrative and management bodies ;
 - A bank certificate of the paid-up capital ;
 - PV valuation of subscribed units.
4. Registration at the local register of cooperatives: is made at the court of first instance, which issues a certificate of registration. The registration file includes the following documents :
 - The certificate of the approval of the cooperative name issued by the ODCO ;
 - The receipt of the local administrative authority ;
 - The status of the cooperative signed by the constituent members and approved by the competent authorities ;
 - List of cooperative members with subscribed units and capital as well as paid-up capital ;
 - Copies of identity documents of all members as well as agents of administrative and management bodies ;
 - A bank certificate of the paid-up capital ;
 - Record of the evaluation of subscribed units.
5. Notification of the concerned administrations: deposit of a copy of the file of the cooperative as well as the registration certificate with the regional services of the ODCO and the technical administration concerned by the activity of the cooperative.

CREATION OF AN ECONOMIC INTEREST GROUP (EIG) :

Law No. 13-97 promulgated by Dahir No. 1-99-12 of chaoual 18, 1419 (February 5th, 1999), 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 aren't 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 ;
- La dénomination du GIE doit être faite de telle sorte qu'elle ne peut être utilisée que par lui et doit être indiquée sur les actes et documents émanant du groupement avec la mention «GIE».

LABOUR LAW :

Moroccan labour law, as defined in Law No. 65-99 promulgated by Dahir No. 1-03-194 of rajab 14, 1424 (september 11, 2003) 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

ENVIRONMENTAL REQUIREMENTS :

The sustainable development and environment national charter was adopted the April 24th, 2010 on the occasion of the celebration of the earth world day. This is part of a unifying logic, wanting to work for the following purposes :

- Insist on complementarities or interdependencies between environmental protection and development ;
- Improve knowledge and encourage the adoption of the principles of environmental protection and sustainable development ;
- Promote cultural change in favor of responsible attitudes towards the environment ;
- Define the commitments of the concerned Parties at the national level.

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

Protection and enhancement of the environment (general provisions) :

The general provisions for the protection and enhancement of the environment derive from Law No.11-03 promulgated by the Dahir No. 1-03-59 of 10 Rabii I 1424 (May 12, 2003) and its application's texts. These texts set out the guiding principles for the protection and management of the environment and deal with obligations that represent a risk to the environment as well as provisions that aims fight pollution and nuisances. They also refer to environmental management instruments such as standards to be applied, impact studies and the development of contingency plans.

Water quality :

In application of the provisions of the law n °10-95 promulgated by the Dahir n °1-95-154 of the 18 rabii I 1416 (August 16, 1995) on the water (article 51) and its texts of application, in particular the Decree No. 2-97-787 of 6 chaoual 1418 (February 4th, 1998) on the quality standards of the degree of water pollution, several water quality standards have been prepared to set the requirements that an environment must meet according to different uses.

Gestion des déchets :

Waste management :

It is governed in particular by :

- Law No. 28-00 promulgated by Dahir No. 1-06-153 of 30 Chaoual 1427 (22 November 2006) on the management of waste and its disposal ;
- Decree No. 2-07-253 of 14 Rajab 1429 (18 July 2008) on the classification of wastes and the list of dangerous wastes ;
- Decree No. 2-09-139 of 25 January I 1430 (May 21, 2009) on the management of medical and pharmaceutical waste ;

- Decree No. 2-09-284 of 20 hija 1430 (8th of December 2009) laying down administrative procedures and technical prescriptions of controlled landfills ;
- Decree No. 2-09-285 of 23 Rajab 1431 (6th of July 2006) laying down the procedures for drawing up the prefectural or provincial master plan for the management of household and similar waste and the procedure for organizing the public inquiry therein afferent ;
- Decree No. 2-09-683 of 23 Rajab 1431 (6 July 2010) laying down the procedures for the preparation of the regional master plan for the management of non-hazardous industrial, medical and pharmaceutical waste, ultimate waste, agricultural and inert waste and the procedure organization of the public inquiry related to this plan.

Fight against air pollution :

It derives in particular from the law n ° 13-03 promulgated by the Dahir n ° 1-03-61 of 10 rabii I 1424 (12 May 2003) relating to the fight against the air pollution and decree n ° 2- 09-631 of 23 rajab 1431 (6 July 2010) fixing the limit values for the release, emission or discharge of pollutants into the air emanating from fixed sources of pollution and the procedures for their control.

Environmental Impact Assessment (EIA): It is governed by :

- Law No. 12-03 on impact studies ;
- Decree No. 2-04-563 on the powers and functioning of the national committee and regional EIA committees ;
- Decree No. 2-04-564 laying down the procedures for the organization and conduct of the public inquiry into projects subject to EIAs.

For further details, please refer to the official websites of the governmental authority for the environment :

www.mem.gov.ma et www.water.gov.ma

REFERENCE REGULATORY FRAMEWORK :

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

The agro-industry Moroccan standards are structured as follows :

- plant products ;
- Canned fruits and vegetables ;
- Other products derived from fruits and vegetables ;
- Milks and dairy products ;
- Other products of the food industry (sugar, oils, tea ...) ;
- Meat and meat products ;
- Fishery products ;
- Tobacco, tobacco products and related equipment ;
- Organic farming.

Here are some examples of standards :

NM 08.1.200-1998	Bread (soft) wheat - specifications
NM 08.1.214-1999	Durum wheat - specifications
NM ISO 3100-1-97	Meat and meat products - Part 1: sampling
NM 08.0.002	HACCP management system - requirements

STANDARDIZATION :

Standardization aims the development of standards. It is governed by the following texts :

- Dahir No. 1-70-157 of 26 Jourmada I 1390 (30th of July 1970) on industrial standardization, aiming quality and improvement of productivity, as modified and supplemented in particular by Law No. 1-93-221 of 10 September 1993 ;
- Decree No. 2-70-314 of 6 Chaâbane 1390 (October 8th, 1970) setting the composition and attributions of the bodies responsible for industrial standardization, aiming search for quality and the improvement of productivity ;
- Decree No. 2-93-530 of 03 Rabii II 1414 (20th September 1993) adopted for the application of Dahir No. 1-70-157 of 26 Jourmada I 1390 (30 July 1970) on industrial standardization aiming quality and productivity improvement.

The standardization unit is made up of poles responsible for the following sectors :

- Chemistry and parachimy ;
- Agribusiness ;
- Textiles and leather ;
- Mechanics, metallurgy and electricity ;
- Building and public works ;
- Health, safety, quality and the environment.

Technical work on the development of Moroccan standards is conducted by Technical Standards Committees (CTS or CTN). It takes place in 8 main stages as illustrated by the following diagram :



CERTIFICATION :

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

- Quality management systems Certification (ISO 9001: 2008) ;
- Environmental Management Systems Certification (ISO 14001: 2004) ;
- Workplace health and safety management certification (NM 00.5.801: 2009) ;
- Certification of industrial and agro-food products according to the corresponding Moroccan standards ;
- Industrial and agro-food products certification according to the corresponding Moroccan standards ;
- Risk analysis systems and critical control point certification (HACCP) ;
- Food safety management systems certification (ISO 22000) ;
- Social conformity Certification (NM 00.5.601) ;
- NM product certification : The NM certification of a product results in obtaining the right to use the NM mark on the certified product.

NM Brand :

The NM brand is a voluntary national certification label which, affixed to a product, certifies that the latter has been evaluated and certified in accordance with Moroccan standards.

Reference systems of certification :

For a given product, the management of the NM brand is in accordance with the following standards :

- The circular relating to the granting of the right to use the brand of conformity to Moroccan standards on products ;
- The product-specific circular, which essentially sets the terms for self-checking ;
- Standards of specifications and tests of said product.

ISO 22000 certification :

The ISO 22000 standard is currently the only international standard that harmonize food safety management practices. It is applicable to all actors in the food chain.

ISO 22000 holds four closely related main blocks :

- The responsibility of the management ;
- Resource management ;
- Planning and realization of safe products ;
- Validation, verification, and improvement of the system in place.

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

HACCP certification :

HACCP is an abbreviation for «Hazard Analysis Critical Control Points». This is a voluntary certification brand certifying that the system of the body concerned has been evaluated and certified according to the following standards :

- The regulations in force ;
- The standards NM 08.0.000 «General principles : Food hygiene» and HACCP: NM 08.0.002 : «HACCP management system - requirements» or equivalent international standards ;
- HACCP certification circular ;

This certification targets agribusiness companies or clients or suppliers in this sector.

Stakeholders in certification when made by MICNT :

- Certifying body: the Ministry of Industry, which does this through the Moroccan Institute for Standardization (IMANOR). This one was created by the law n ° 12-06 and its texts of application. He then took over the activities ensured in the past by the Moroccan Industrial Standardization Service (SNIMA) ;
- Technical Certification Committees (CTC): they are constituted by order, on the proposal of IMANOR ;
- Qualified audit agents / auditors, responsible for audit and monitoring visits ;
- Accredited testing laboratory.



INSTITUTIONAL FRAMEWORK

The institutional framework, as reported below, includes the MAPMDREF (ministry of agriculture), as the governmental authority in charge of agriculture, the bodies under its supervision, each specialized by field of intervention and, where appropriate, by concerned territory and professional organizations.

 Ministry of agriculture, fisheries rural development, water and forests www.agriculture.gov.ma	 The agency for Agricultural Development www.ada.gov.ma	 National Agency for the development of oases zones and argan forest ANDZOA www.andzoa.ma	 Regional offices for the agriculture enhancement (ORMVA) www.agriculture.gov.ma
 Official laboratory of chemical research and analysis (LOARC) www.loarc.org	 National office for food sanitary safety (ONSSA) www.onssa.gov.ma	 National institute for agronomic research (INRA) www.inra.org.ma	 National Agency for Land Registry and Cartography Conservation (ANFCCC) www.anfccc.ma
 Royal Society for the Encouragement of the Horse (SOREC) www.agriculture.gov.ma	 National school of agriculture (ENA) www.enameknes.ma	 National Seed Marketing Corporation (SONACOS) www.agriculture.gov.ma	 National Board of Agriculture Advisory (ONCA) www.onca.gov.ma
 National Interprofessional Office for Cereals and Leguminous Plants (ONICL) www.onicl.org.ma	 Veterinary and agronomic institute Hassan II (IAV) www.iav.ac.ma	 Independent establishment of export control and coordination (EACCE) web2.eacce.org.ma	 Port Silos's company (SOSIPO) www.sosipo.com

Focus on the Agency for Agricultural Development

The Agency for Agricultural Development (ADA) plays a fundamental role, since its establishment in 2009, in the realization of the strategic ambitions drawn for the agricultural sector by 2020, in order to guarantee the durability and integrity of the vision «Green Morocco Plan».

The impulse of the GMP initiatives, the promotion and renewal of the Morocco offer, the launch of concrete projects, intermediation, monitoring and evaluation of the implementation, and the management of partnerships with institutional and social investors, constitute the heart of the missions entrusted to the ADA.

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

Main professional organizations

FIMA SUCRE	Moroccan Interprofessional Federation of Sugar www.fimasucre.ma	APEFEL	Moroccan Association of producers and producers exporters of fruits and vegetables
FIMALAIT	Moroccan Interprofessional Federation of Milk www.fimalait.ma	ASPAAM	Moroccan Association of citrus producers in Morocco
FISA	Interprofessional Federation of poultry sector www.fisamaroc.org.ma	ASPEM	Moroccan Association of producers exporters of fruits and vegetables and early seasonal products
FNM	National Federation of Milling www.fnm.org.ma	FIMD	Moroccan Interprofessional Federation of dates
FEDAM	Federation For Development of Arboriculture in Morocco	UNAPPSM	National Union of Sugar plant producer associations of Morocco
FIVIAR	Interprofessional Federation of Red Meat	AMABIO	Moroccan Association of the organic production sector
FCG	Federation of fats industries in Morocco	FIMAP	Moroccan Interprofessional Federation of bee keeping
INTER PROLIVE	Moroccan Interprofessional Federation of olive	FIMA ROSE	Moroccan Interprofessional Federation of perfume rose
FENAGRI	National Agri Food Federation www.finagri.org	FIMA SAFRAN	Moroccan Interprofessional Federation of saffron
FICOPAM	Canning Industries Federation of Agricultural Products of Morocco www.ficopam.ma	FIMA ARGANE	Moroccan Interprofessional Federation of argan
AMCEF	Moroccan Association of Conditioners and Exporters of Red Fruits	FF	Fresh fruit
AMMS	Moroccan Association of seed multipliers	MFB	Morocco fruit board
AMSP	Moroccan Association of seeds and plants	FNCL	National Federation of Cereal and Legume Traders
Other Organizations		ANPCL	National Association of cereal and legume producers
			Southern Provincial Associations of Camel Breeders





MARKETING OF AGRICULTURAL INPUTS AND PRODUCTS



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 1980s. That is why the number of hypermarkets rose from 6 in 1997 to over 20 in late 2011 ;
- Retail and service chains, and the franchises: they are developing rapidly from the 90s. In addition, since 2005, the sector recorded a growth rate of more than 20% and in 2010, Morocco had nearly 330 franchise chains with over 2200 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 600 million, while its potential turnover is MAD 2.7 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 1230 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 ;
- 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 phytosanitary 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 2005, in an average of 15% per year, while in volume it is only 4.5% 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 600 to 650 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 rodweeders ;
- 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 «Asaar», 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.

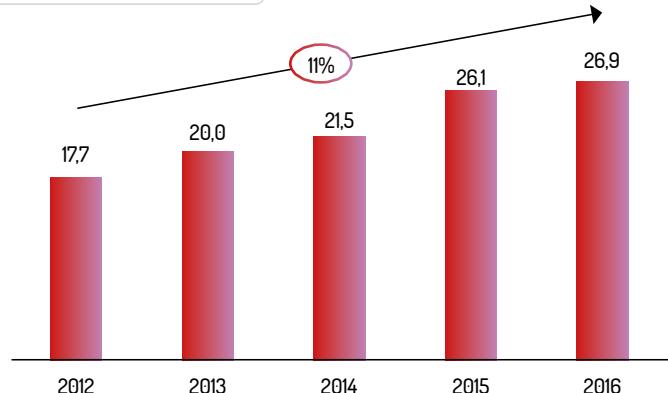
The elements produced by the «Asaar» system are available on the website :

www.prixagriculture.org/asaar



EXPORT MARKET

Evolution of Moroccan exports in agricultural products (Md DH)



Between 2012 and 2016, despite the slowdown in demand from the main importing markets, Moroccan exports of agricultural products were marked by a positive dynamic with an average annual growth rate of around 11%, reaching nearly Dhs 27 billion. This performance is due to the strong growth in exports of all export sectors.

PRODUCTS (DH BILLION)	2012	2013	2014	2015	2016	2017*
AGRICULTURAL PRODUCTS	17,7	20,0	21,5	26,1	26,9	20,8
FRUITS & VEGETABLES INCLUDING:	10,7	12,3	13,1	16,3	16,1	11,8
TOMATO	3,4	3,6	4,0	5,3	4,9	3,1
CITRUS	2,8	3,2	3,1	3,8	3,5	1,8
PRECESSED VEGETABLE PRODUCTS	4,6	4,8	5,5	5,9	6,4	5,4
OTHERS	2,5	2,9	2,9	3,9	4,4	3,6

(*) Figures at end of October 2017

The export sector of agricultural products is one of the main sources of foreign currency in Morocco. In 2016, the contribution of this sector to the total value of Moroccan exports was 12%.

Moroccan products are exported to a hundred countries around the world. The main destination countries for these agricultural products are those of the European Union, Russia and the United States of America.

The dynamics of the export sector of agricultural products in recent years has allowed Morocco to become one of the world's leading exporters. So, Morocco is :

- 3rd world exporter of canned olives ;
- 4th world exporter of clementines ;
- 4th world exporter of tomatoes ;
- 1st world exporter of capers.

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, 1996 and entered into force on March 1, 2000. 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 2006 that led to a new agreement signed in December 2010 by the two parties. This new agreement, which covers all agricultural products, entered into force on October 1, 2012 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.

Accord de libre - échange entre le Maroc et les Etats-Unis d'Amérique :

The free trade agreement between Morocco and the United States of America, was signed on June 15, 2004 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 bovine meat, some dairy products, tomato preserves and sauces, dried onions ... etc.

Furthermore, in addition to progressive dismantling and to protect certain agricultural products, the Agreement provides for agricultural safeguard measures on the basis of US price thresholds (processed tomatoes, asparagus, canned olives, pears, apricot, peach, orange juice ... etc) or volume thresholds for Morocco (Chickens and turkeys, chickpeas and lentils, bitter almonds ... 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.

In 2018, the Morocco-USA Free Trade Agreement is in its 13th year of implementation.

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, 1997 and entered into force on March 1, 2000. 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, 2004 and entered into force on January 1, 2006, 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, 2004 between Morocco, Tunisia, Egypt and Jordan, and came into force on March 27, 2007, 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, 2001, and entered into force on July 9, 2003. The total liberalization of agricultural trade, agribusiness and Fisheries between the two countries came into effect since January 1, 2005.

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. 5080/233 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, 1981, between the Arab countries, and entered into force on January 1, 1998.

The agreement provides, regarding all agricultural products, for the total exemption of import duty in Morocco and taxes having equivalent effect as of 01/01/2005.

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. 5080/233 of 12 /31/2007). For the rest of the agricultural products the negotiations are being finalized within the framework of the Arab League.

EXPORT PROCEDURES :

Main provisions :

All products can be freely exported with some predefined exceptions under the provisions of Order No. 1308-1394 of April 19, 1994 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 KMAD 3 made with no commercial value and without payment ;
- Export of samples «without payment for which the amount is equal to or less than KMAD 10 ;
- Export of goods of Moroccan origin for which the amount is less than or equal to KMAD 50 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 KMAD 3 ;
- Export of samples without payment of a value greater than KMAD 10 ;
- Export for consignment selling of products other than agricultural or craft products ;
- Export carried out within a period of payment exceeding 150 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 150 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. 1606 of September 21, 1993. 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, 1944 (13 Ramadan 1363), the products originating in Morocco are subject to technical control of manufacturing, packaging and export.

This Dahir is supplemented and amended by Dahir No. 1-88-241 of 28 May 1993 (6 del Hijjah 1413) promulgating Law No. 32-86 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. 1-88- 240 of 28 May 1993 (6 dil Hijjah 1413) promulgating Law No. 31-86 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 1944 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. 1-13-70 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,1948, 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, 1944, 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.



IMPORT 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. 13-89 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, 1994 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. 1308-94 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 ...).

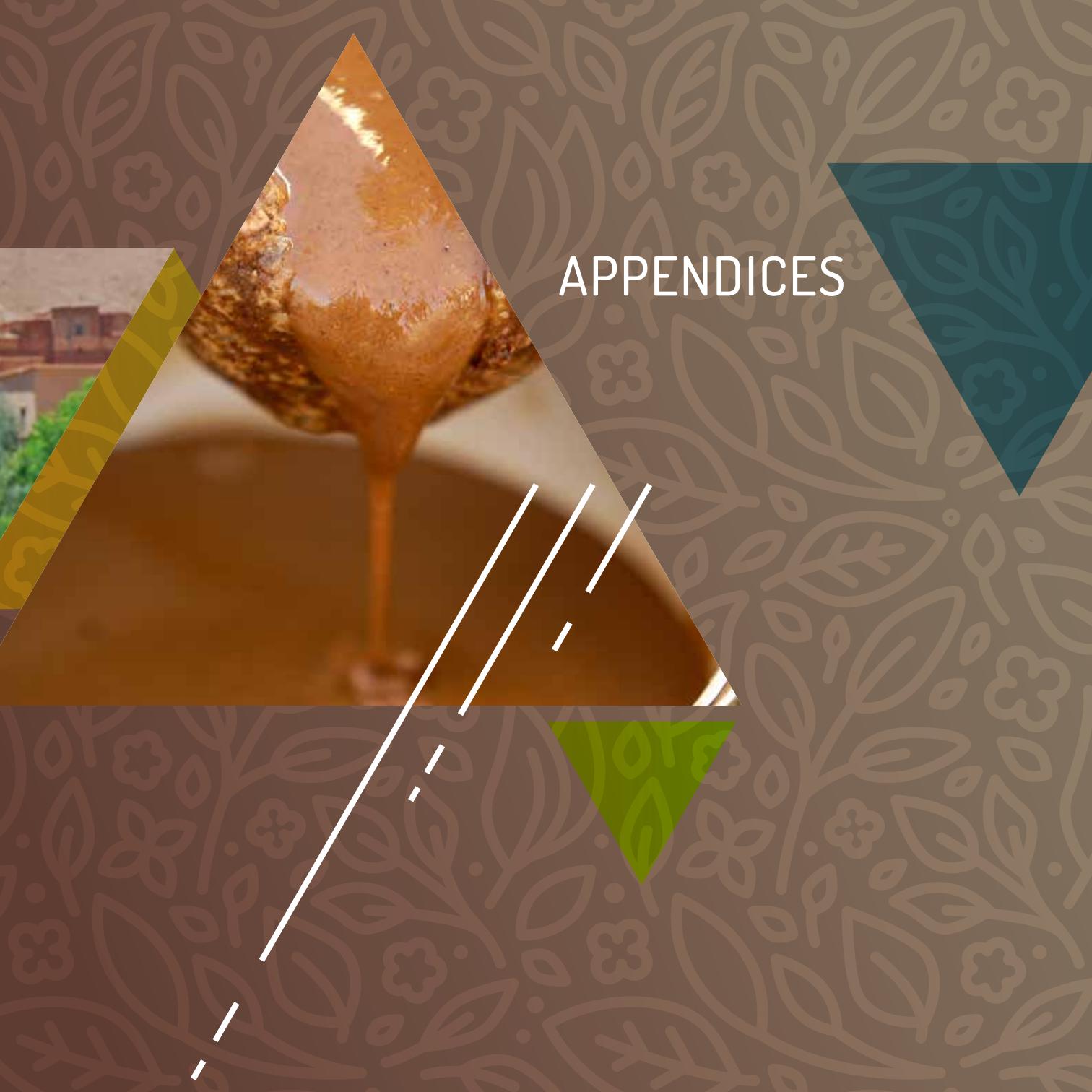
The advance import declaration is established by a joint decision of the DCCE and the minister or ministers concerned. It is drawn up on a specific form. The duration of its validity is 9 months, renewable once. This period begins to run from the date of the joint decision of the DCCE and the minister 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.





APPENDICES



ABBREVIATIONS AND SYMBOLS

ADA	Agency for Agricultural Development
AELE	European Free Trade Association
AMCEF	Moroccan Association of Conditioners and Exporters of Red Fruits
AMMS	Moroccan Association of Seed Multipliers
AMO	Compulsory Health Insurance
AMSP	Moroccan Association of Seeds and Plants
AOP	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 and Producers Exporters of Fruits and Vegetables
CRCA	Regional Bank for Credit Agricole
DCE	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
EIE	Study of Environmental Impact
FDA	Agricultural Development Fund
FIMADATTES	Moroccan interprofessional Federation of Dates
FIMALAIT	Moroccan Interprofessional Federation of Milk
FISA	Interprofessional Federation of Poultry Sector
FIVIAR	Interprofessional Federation of Red Meat
FMI	International Monetary Fund
GH	Large Hydraulic
ha	Hectare
HACCP	Hazard Analysis Critical Control Points
IAA	Food industry
IAV	Hassan II Institute of Agronomy & Veterinary
IDE	Foreign Direct Investment
IGP	Protected Geographical Indication
INRA	National Institute for Agricultural Research

KMAD	Thousands of Dirhams
Kg	Kilogram
LA	Agricultural Label
MAD	Moroccan Dirham
MAMDA	Moroccan Agricultural Mutual Insurance Company
MAPMDREF	Ministry of Agriculture, Fisheries, Rural Development, Water and Forests
MCA	Millennium Challenge Account
MET	Ministry of Equipment and Transport
MMAD	Millions of Dirhams
MdMAD	Billion Dirhams
ODCO	Office of Cooperation Development
ONCA	National Office of Agricultural Consulting
ONICL	National Interprofessional Office for Cereals and Leguminous Plants
ONSSA	National Office for Health Security of Food Products
ORMVA	Regional Office of Agricultural Development
PAR	Regional Agricultural Plan
PNEEI	National Irrigation Water Saving Program
PNEI	National Pact for Industrial Emergence
PIB	Gross Domestic Product
PIBA	Agricultural Gross Domestic Product
PMH	Small and Medium Hydraulic
PMV	Green Moroccan Plan
PPP	Public-private partnership
PRDCQ	Human Resources
RH	Ressources Humaines
R&D	Research and development
SAU	Useful Agricultural Area
SDOQ	Distinctive Signs of Origin and Quality
SNIM	Moroccan Industrial Standardization Office

USEFUL LINKS AND WEBSITES

Central institutions

Entity	Contact
Ministry of Agriculture, Fisheries, Rural Development, Water and Forests (MAPMDREF) Agricultural Department	05 37 66 53 00 05 37 66 54 50 05 37 66 56 00
Minister Office	05 37 76 26 36 05 37 76 42 77
General Secretary (SG)	05 37 66 55 11 05 37 66 56 12
General Council of Agriculture Development (CGDA)	05 37 68 64 61
General Inspection (IG)	05 37 66 56 18 05 37 66 56 19
Strategy and Statistics Directorate (DSS)	05 37 66 5517/18
Information Systems Directorate (DSI)	05 37 10 31 82
Financial Directorate (DF)	05 37 10 31 81
Administrative and Juridical Affairs Directorate (DAAJ)	05 37 10 31 71/72
Human Resources Directorate (DRH)	05 37 10 31 73/74
Production Chains Development Directorate (DDFP)	05 37 10 31 76
Irrigation and Management of Agricultural Land Directorate (DIAEA)	05 37 10 31 78
Education, Training and Research Directorate (DEFR)	05 37 10 31 79
Rural Space and Mountain Area Development Directorate (RSMADD)	05 37 66 76 71
National Office for Agricultural Consulting (ONCA)	05 37 77 65 13 05 37 21 73 12/02
National Interprofessional Office for Cereals and Leguminous Plants (ONICL)	05 37 21 73 12/02
Agency for Agricultural Development (ADA)	05 37 57 38 01
National Agency for Development of Oasis zones and the Argan tree (ANDZOA)	0537 70 66 77
The National Office for Health Security of Food Products (ONSSA)	05 37 67 65 05-06 05 37 77 94 72
The Autonomous Establishment for Export Control and Coordination (EACCE)	05 22 30 81 22
National Institute for Agricultural Research (INRA)	05 37 77-09-55/ 77-26-42
Crédit Agricole Morocco (CAM)	05 37 73 88 88 05 37 72 78 55
Hassan II Institute of Agronomy & Veterinary (IAV Hassan II)	05 37 77 09 35 05 37 77 81 10

National Seed Marketing Company (SONACOS)	05 37 76 24 89
National School of Agriculture Meknes (ENA Meknès)	05 35 30 02 39/40/ 41
National School for Forest Engineers (ENFI)	05 37 86 11 49 05 37 86 37 04
Official Laboratory of Chemical Analysis and Research (LOARC)	05 22 30 21 98
Society for Veterinary Biological and Pharmaceutical Products (BIOPHARMA)	05 37 69 16 92
Royal Company for Horse Encouragement (SOREC)	05 37 27 10 04/05
Society of Port Silos (SOSIPO)	05 22 97 47 61 05 22 23 55 74
National Agency for Land Conservation, Cadastre and Cartography (ANCFCC)	05 37 70 90 01 05 37 70 57 17
Pillar II Resources Center (CRP II)	05 35 56 72 02

Regional Directorates of Agriculture

Entité	Contact
Regional Directorate of Agriculture of Tangier - Tetouan - Al Hoceima	05 39 32 23 05 05 39 34 34 13
Regional Directorate of Agriculture of Oriental	05 36 61 34 68
Regional Directorate of Agriculture of Fes - Meknes	05 35 52 47 71
Regional Directorate of Agriculture of Rabat - Sale - Kenitra	05 37 42 42/43
Regional Directorate of Agriculture of Beni Mellal - Khenifra	05 23 42 43 47
Regional Directorate of Agriculture of Casablanca - Settat	05 23 39 40 20
Regional Directorate of Agriculture of Marrakech - Safi	05 24 43 14 09
Regional Directorate of Agriculture of Draa - Tafilalet	05 35 57 25 04
Regional Directorate of Agriculture of Souss - Massa	05 28 82 71 31
Regional Directorate of Agriculture of Guelmim - Oued Noun	05 28 77 39 47 05 28 77 20 96
Regional Directorate of Agriculture of Laayoune - Sakia Hamra	05 28 99 32 96
Regional Directorate of Agriculture of Dakhla - Oued Eddahab	05 28 93 16 98

One-stop shop of the Provincial Directorates of Agriculture (DPA) and the Regional Offices of Agricultural development (ORMVA)

Région	DPA/ORMVA	Contact
BÉNI MELLAL - KHENIFRA	DPA OF AZILAL DPA OF BÉNI MELLAL DPA OF KHÉNIFRA DPA OF KHOURIBGA ORMVA OF TADLA	Tél : +212 523 45 83 98 Tél : +212 523 48 25 76 Tél : +212 535 58 61 62 Tél : +212 523 56 26 68 Tél : +212 523 43 50 48
CASABLANCA - SETTAT	DPA OF BENSLIMANE DPA OF CASABLANCA DPA OF EL JADIDA DPA OF SETTAT ORMVA OF DOUKKALA	Tél : +212 523 29 11 12 Tél : +212 522 27 88 71 Tél : +212 523 34 29 90 Tél : +212 523 40 37 48 Tél : +212 523 34 22 70
ORIENTAL	DPA OF FIGUIG DPA OF NADOR DPA OF OUJDA DPA OF TAOURIRT DPA OF GUERCIF DPA OF JERADA ORMVA OF MOULOUYA	Tél : +212 536 79 81 65 Tél : +212 536 60 64 13 Tél : +212 536 68 25 04 Tél : +212 536 69 93 88 Tél : +212 536 70 20 18 Tél : +212 536 70 20 18 Tél : +212 536 61 28 28
MARRAKECH - SAFI	DPA OF CHICHAOUA DPA OF ESSAOUIRA DPA OF MARRAKECH DPA OF RHAMNA DPA OF SAFI ORMVA OF HAOUZ	Tél : +212 524 35 30 86 Tél : +212 524 78 41 12 Tél : +212 524 43 10 59 Tél : +212 524 41 24 44 Tél : +212 524 62 31 88 Tél : +212 524 44 96 50
DRAA - TAFILALET	DPA OF MIDELT ORMVA OF OUARZAZATE ORMVA OF TAFILALET	Tél : +212 535 36 06 37 Tél : +212 524 88 26 14 Tél : +212 535 57 04 00
RABAT - SALÉ - KÉNITRA	DPA OF KHEMISSET DPA OF RABAT DPA OF SIDI KACEM ORMVA OF GHARB	Tél : +212 537 55 29 13 Tél : +212 537 63 26 32 Tél : +212 537 59 38 06 Tél : +212 537 37 45 02
FÈS - MEKNÈS	DPA OF BOULMANE DPA OF FÈS DPA OF EL HAJEB DPA OF IFRANE DPA OF MEKNÈS DPA OF SEFROU DPA OF TAOUNATE DPA OF TAZA	Tél : +212 535 58 54 58 Tél : +212 535 62 15 73 Tél : +212 535 54 33 03 Tél : +212 535 56 21 87 Tél : +212 535 52 00 14 Tél : +212 535 68 26 73 Tél : +212 535 62 76 92 Tél : +212 535 67 32 32
SOUSS - MASSA	DPA OF TATA DPA OF TIZNIT DPA OF AGADIR ORMVA OF SOUSS MASSA	Tél : +212 528 80 20 58 Tél : +212 528 86 20 76 Tél : +212 528 84 00 63 Tél : +212 528 84 08 27

GUELIMM - OUED NOUN	DPA OF ASSA ZAG DPA OF GUELIMM DPA OF TANTAN DPA OF SIDI IFNI	Tél : +212 528 70 06 42 Tél : +212 528 87 25 02 Tél : +212 528 87 75 44 Tél : +212 528 78 06 64
TANGER - TÉTOUAN - AL HOCEIMA	DPA OF CHEFCHAOUEN DPA OF AL HOCEIMA DPA OF OUEZZANE DPA OF TANGER DPA OF TETOUAN ORMVA OF LOUKKOS	Tél : +212 539 98 66 36 Tél : +212 539 98 29 40 Tél : +212 537 90 86 76 Tél : +212 539 94 03 17 Tél : +212 539 96 57 22 Tél : +212 539 91 86 76
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DAKHLA - OUED EDDAHAB	DPA OF DAKHLA	Tél : +212 528 89 70 59

Agricultural Chambers

Agricultural Chamber of Marrakech- Safi	05 24 83 35 69 06 10 49 73 68
Agricultural Chamber of Oriental	0536 68 32 55
Agricultural Chamber of Fes-Meknes	0535 52 20 70
Agricultural Chamber of Rabat-Salé-Kenitra	05 37 32 72 86 05 37 37 38 59
Agricultural Chamber of Béni Mellal Khenifra	05 23 48 51 70
Agricultural Chamber of Casablanca-Settat	05 23 34 27 26
Agricultural Chamber of Tanger - Tetouan-Al hoceima	05 39 96 46 59
Agricultural Chamber of Darra-Tafillalet	05 35 79 10 65/70
Agricultural Chamber of Souss-Massa	05 28 23 09 28
Agricultural Chamber of Guelmim- Oued Noun	05 28 77 36 08
Agricultural Chamber of Laayoune - Sakia - Al hamra	05 28 89 47 52
Agricultural Chamber of Dakhla-Oued Ed-Dahab	05 28 89 70 44/63

Interprofessions of the Moroccan agricultural sector

	Address	Contact
Olive	Moroccan Interprofessional Federation of Olive (INTERPROLIVE), sector 1, building 10, Appt 2, Oulad M'taa, Temara	Tél : +212 537 62 97 93 Fax : +212 537 62 97 94 benali.rachid1961@gmail.com
Vegetables	Interprofessional Moroccan Federation of Production and Export of Fruits and Vegetables (FIFEL), Av. My Ismail, district Nahda, Agadir	Tél : +212 528 84 31 87 Fax : +212 528 22 82 34 fifel.fifel@gmail.com
Seeds	National Interprofessional Federation of Seeds (FNIS), 5 street Oum Rabii, Appt n°3 Agdal, Rabat	Tél : +212 537 77 40 24 Fax : +212 537 77 20 40 fnis.semences@gmail.com
Cereals and Leguminous Plants	Interprofessional Federation of Cereal Activities (FIAC), Angle Bd Abou Majid Al Bahar and Street El Brihmi El Idrissi, Casablanca	Tél : +212 522 30 73 23 Fax : +212 522 30 65 51 fnm@fnm.org.ma fiac.cereales@gmail.com
Citrus fruits	Interprofessional Federation of Citrus (Maroc Citrus), Sect. 22 Resd. Al Arz, Building D, Appt 9, Hay Riad, Rabat	Tél : +212 537 71 62 31 Fax : +212 537 71 62 32 Maroccitrus2014@gmail.com
Sugar	Moroccan Interprofessional Federation of Sugar (FIMASUCRE), Av. Ibn Al Hajjär, Rés. Al Waha, Agdal, Rabat	Tél : +212 537 68 31 50 Fax : +212 537 683 152 againg@menara.ma
Fruit Trees	Federation For Development of Arboriculture in Morocco (FEDAM), Av. Allal Ben Abdellah, Building. Al Watania, Appt. 631, new city, Meknès	Tél : +212 535 52 82 40 Fax : +212 535 40 41 42 abelkora@agrojus.com fedamarroc@gmail.com
Organic Production	Moroccan Association of the organic production sector (A.MA. BIO), Agropark, DA 5, Road Azmmour, Casablanca	Tél : +212 522 95 33 00 Fax : +212 522 89 69 21 Amabio.maroc@gmail.com
Date Palm	Moroccan Interprofessional Federation of Dates (FIMADATTES), N° 5, Building. Kawtar, Street Changuite, Errachidia	Fax : +212 535 57 70 86 fimadattes@gmail.com
Argan	Moroccan Interprofessional Federation of Argan (FIMARGANE)	Tél : +212 528 24 00 06 omegainstitut@gmail.com
Rose	Moroccan Interprofessional Federation of perfume rose (FIMAROSE), Kelaa Magouna	Fax : +212 522 89 69 08 jcharaf@domaines.co.ma president@fimarose.org
Safran	Moroccan Interprofessional Federation of Saffron (FIMASAFRAN), Dar Zaafrane, Taliouine	Tél : +212 528 53 40 42 darzeafran@gmail.com

Rice	National Interprofessional Federation of Rice (FNIR), 45 Industrial District, Kénitra	Fax : +212 537 36 49 15 Khalile1955@gmail.com
Oilseed crops	Interprofessional Federation of Oilseeds (FOLEA), 1 Street of Caporal Corbi, Roches Noirs, B.P 3095, 20300, Casablanca	Fax : +212 522 35 87 40 zaz@lesieur-cristal.co.ma
Milk	Moroccan Interprofessional Federation of Milk (FIMALAIT)	Tél : +212 537 71 54 73 Fax : +212 537 56 56 97 fimalait14@gmail.com
Beekeeping	Moroccan Interprofessional Federation of Beekeeping (FIMAP), 6 Street Ibn Al hajjar, Appt. N°5, Agdal, Rabat	Fax : +212 537 77 10 62 fimap-maroc@yahoo.fr
Poultry	Interprofessional Federation of the Poultry Sector (FISA), 123, street Emile Zola, Casablanca	Tél : +212 522 31 12 49 fisamaroc@gmail.com
Red meat	Interprofessional Federation of Red Meats (FIVIAR), Av. Al Boughaz, Villa n°259, Sect 1, Hay Essalam, Salé	Tél : +212 537 76 28 88 k.chajai@gmail.com fiviar@fiviar.ma

Regional Investment Centers

CRI	Address	Contact
CRI Casablanca-Settat	60, Avenue Hassan II, 20000, Casablanca	Tél : +212 522 48 18 88 Fax : +212 522 48 15 21 www.casainvest.ma
CRI Rabat-Salé-Kénitra	23, avenue of Victory, 10090, Rabat	Tél : +212 537 77 64 00 Fax : +212 537 77 63 88 www.rabatinvest.ma
CRI Tanger-Tétouan-Al Hoceima	Avenue Omar Ibn Al Khattab, Tanger	Tél : +212 539 34 23 03 Fax: +212 539 94 33 14 www.investangier.com
CRI Fès-Meknès	Place of Résistance angle Bd. Moulay Youssef and Allal El Fassi, Fès	Tél : +212 535 65 20 57 Fax : +212 535 65 16 46 www.fesmeknesinvest.ma
CRI Marrakech-Safi	Bd John Kennedy, Jnane El Hériti, Guéliz, Marrakech	Tél : +212 524 42 04 91 Fax: +212 524 42 04 92 www.crimarrakech.ma
CRI Souss-Massa	Cité Founty B.P : 31.333, Agadir	Tél : +212 528 23 08 77 Fax : +212 528 23 08 81 www.agadirinvest.com
CRI Oriental	Bd Prince Mly El Hassan, 60000, Oujda	Tél : +212 536 68 28 27 Fax: +212 536 69 06 81 www.orientalinvest.ma
CRI Béni Mellal Khénifra	Bd. Bayrout, 23000, Béni Mellal	Tél : +212 523 48 20 72 Fax : +212 523 48 23 13 www.coeurdumaroc.ma
CRI Dakhla-Oued Eddahab	Avenue Ahmed Ben Chekroun, Massira II, B.P.01 Dakhla	Tél. : +212 528 89 85 35 Fax : +212 528 89 79 12 www.cridakhla.com
CRI Laâyoune-Sakia Elhamra	Bd Mekka, BP 2266, 70 000, Laâyoune	Tél. : +212 528 89 11 89 Fax : +212 528 89 11 79 www.laayouneinvest.ma
CRI Guelmim-Oued Noun	Bd mohamed VI, 81000, BP 202, Guelmim	Tél. : +212 528 77 15 55 Fax : +212 528 77 17 77 www.guelmiminvest.ma
CRI Draa-Tafilalet	N° 23 Bd Bir Anzarane, Centre-ville, Errachidia	Tél : +212 35 57 38 01 Fax: +212 35 57 31 50 www.draatafilaletinvest.com

Hydraulic Basin Agencies

Hydraulic Basin Agency	Address	Contact
Hydraulic Basin Agency of Oum Er-Rbia (ABHOER)	BP. 511, Code 23 000, Béni Mellal	Tél : +212 523 48 23 55 Fax : +212 23 48 94 15 agence@abhoer.ma www.abhoer.ma
Hydraulic Basin Agency of Bouregreg and Chaouia (ABHBC)	Road of Casablanca, B.P. 262, Benslimane	Tél : +212 523 29 08 21 FAX : +212 523 29 09 99 abhbouregreg@yahoo.fr abhbcb@abhbcb.ma www.abhbcb.ma
Hydraulic Basin Agency of Tensift (ABHT)	Av. Jnane El Harti, Bp : 2388, Marrakech	Tél : +212 524 44 89 64 Fax : +212 524 43 56 20 info@eau-tensift.net www.eau-tensift.net
Hydraulic Basin Agency of sebou (ABHS)	Avenue Abou El Alaa El Maari, Atlas, Fès	Tél : +212 535 64 29 97 Fax : 0535640444 www.abhsebou.ma
Hydraulic Basin Agency of Moulay	Angle Bd Hassan Loukili and Street Ibn Khaldoun, Oujda	Tél : +212 536 68 27 94 Fax : +212 536 68 38 48 contact@abhoulouya.ma www.abhmoulouya.ma
Hydraulic Basin Agency of Souss-Massa (BHSM)	Avenue Moulay Abdellah, B.P 432, 80000, Agadir	Tél : +212 528 84 25 51 Fax : +212 528 84 20 82 abhsmd@menara.ma
Hydraulic Basin Agency of Guir-Ghris-Ziz	Hydraulic Basin Agency of Guir-Ghris-Ziz, Errachidia	Tél : +212 535 57 19 64
Hydraulic Basin Agency of Sakia El Hamra & Oued Eddahab	BP 492, 70 000, Laâyoune	Tél : +212 528 89 33 08 Fax : +212 528 89 34 25





وكالة التنمية الفلاحية

AGENCE POUR LE DEVELOPPEMENT AGRICOLE

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