



MOROCCO





HIS MAJESTY THE KING MOHAMMED VI

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AGRICULTURE IN MOROCCO

The agricultural sector in Morocco has a strategic position in the national economy and plays an important role in the socio-economic development of the Kingdom. The agricultural sector contributes 13% to GDP and is a source of income for 40% of Morocco’s working population.

A vital sector	13% of the national GDP
Employment provider	40% of the Kingdom’s active population
Large export potential	2.2 billion USD, equal to 11% of Morocco’s total exports
Area	9 million hectares, 18% of which are in the irrigated areas

- Moroccan agriculture has several assets, the most important of which are:
- Morocco's geographical location and its immediate proximity to the European market with logistical resources on the increase;
 - A promising and dynamic national market, which is a market with significant population growth and rising living standards;
 - A qualified and highly competitive agricultural labor;
 - Comparative advantages for several products (in particular fruit and vegetables);
 - Presence of several models of successful agricultural and agro-industrial companies.



“GREEN MOROCCO” PLAN

The "Maroc Vert" (Green Morocco) Plan is the country's agricultural strategy. It was launched in 2008 and was designed to make of agriculture the main growth engine of the national economy over the next ten to fifteen years with significant benefits in terms of GDP growth, job creation, export and poverty mitigation.

"Maroc Vert" aims to develop a pluralistic agriculture that is open to foreign markets. It also aims to create a locally diversified and sustainable agriculture.

"Maroc Vert" has allowed :

The doubling of agriculture's share of the national GDP

The creation of 25000 additional jobs

The increase of the income of the populations in the rural areas from 5700 to 9500 MAD per inhabitants per year (+66%)

The increase of export value from 15 to 33 MAD (120%)

2.1 "GREEN MOROCCO" PLAN'S MAIN THEMES

"GREEN MOROCCO" Plan is structured around seven axes :

1- To make of agriculture the main growth driver over the next 10-15 years.

2- To adopt aggregation as an organizing model for agriculture.

3- To develop a Moroccan agriculture that is inclusive (Projects Pillar I and Pillar II).
As a matter of fact, given the great diversity of national agriculture, "MAROC VERT" Plan has adopted two approaches that are differentiated according to the stakeholder.

4- To promote private investment. The objective is to attract an annual investment of nearly 10 billion dirhams (MAD) around a targeted «Moroccan supply.» To this end, the Investor's Guide will present key information to domestic and foreign investors about the Moroccan agricultural sector while focusing on new measures and investment incentives provided by the Green Morocco Plan.

5- To adopt a contractual approach to achieve the Green Morocco Plan. In fact, the implementation of "GREEN MOROCCO" requires mobilizing all stakeholders from different sectors, including government, regional and local elected officials, professionals and associations. Contracting relationships between the various stakeholders helps to ensure accountability of the agricultural stakeholders:

- Regional Agricultural Plans (PAR): Implementation of an agreement between the state and each region (12 Regional Agricultural Plans);
- Contract programs: 20 Agreements between the State and inter-professional organizations (plant and animal production value chains);
- Aggregation: (1) Conventions established between the state and aggregators and (2) aggregation contracts between the aggregator and aggregated.



6- To sustain the development of Moroccan agriculture (natural resources, biodiversity, etc.)

- National irrigation water conservation program;

- Develop public-private partnerships in irrigation;

- Prepare the first project of seawater desalination for irrigation;

- Use environmentally friendly mechanisms and support aspects of climate change adaptation;

- Encourage the use of micro-irrigation through subsidies from the Agricultural Development Fund;

- Boost local development through a local product development strategy;

- Protect local products by implementing labeling.

7- Overhaul the sector's framework. This line of action has resulted in the creation of ADA (the Agency of Agricultural Development), among others.

"GREEN MOROCCO" is a major national strategy that has several foundations, among which we find «Ensuring the development of inclusive Moroccan agriculture». It revolves around a comprehensive approach that involves integrating all the participants in the agricultural sector. It also takes into account the plurality of Moroccan agriculture. This approach is based on two pillars: Pillar I and II.

(*) Aggregation is a voluntary partnership between various parties to achieve a common goal. This system is based on integrating a number of farmers (aggregated) around a key stakeholder (aggregator) with a strong managerial, financial and technical capacity that enables an optimization of the production process.



THE GREEN MOROCCO PLAN IS BASED ON TWO MAJOR PILLARS

Pillar I

Modern agriculture

Pillar I aims to develop modern agriculture with high added value based mostly on private investment.

This pillar also aims to improve agricultural productivity and enhance the competitiveness of Moroccan products in international markets.

Pillar II

Inclusive agriculture

Pillar II concerns the upgrading of smallholder agriculture.

The objective is to increase the production of the vegetable & animal sectors and in disadvantaged rural areas in order to increase farmers' income.

2.2 AGROPOLE

The creation of agropoles is a part of "MAROC VERT" strategy.

It aims to improve, in quantity and quality, the supply of agricultural raw materials for processing and export.

The agropole system provides an integrated offer that includes a business park which can host agribusiness and logistics' companies, a quality control and research center, commercial and services' platforms and a dedicated management structure.



2.3 PROGRAM - CONTRACTS

"Maroc Vert" has set a value chain approach as a fundamental principle to develop an efficient and integrated agriculture. At a time of globalized trade and increased competition in the agricultural market, organizing value chains and private actors taking hold of the development sector are necessary conditions to improve competitiveness.

Seven years after the launch of "Maroc Vert" , a total of 19 inter-professional federations have been created, 14 from the plant sectors and 5 from the animal sectors. Every federation concluded a program contract with the Government.

Characterized by clear, comprehensive and coherent objectives, these program contracts highlight the commitment and determination of the Ministry of Agriculture, Fisheries, Rural Development, Water and Forests and professionals to work together to upgrade and develop key sectors by 2020.

The value chains involved are:



PROGRAM CONTRACT OBJECTIVES: DEVELOPMENT AND UPGRADE OF VALUE CHAIN PRODUCTION

- To encourage private investment at each level of the value chain;
- To promote research and development and technology transfer programs to farmers and other operators in the sector;
- To improve the value chain business environment and conditions;
- To strengthen the competitiveness of the value chain by improving production and the conditions of its enhancement;
- To improve trade and export promotion conditions.

3.4 PARTICIPATION OF PRODUCER GROUPS IN INTERNATIONAL FAIRS:

To promote local products on a global scale, the Ministry of Agriculture allowed the participation of local producer groups at several international events such as:

- Green Week Berlin in 2011, 2012, 2014 and 2015, 2016
- Paris International Agricultural Show (SIA) in 2013, 2014 , 2015 and 2016
- Global Food Marketplace Middle East (SIAL) in Abu Dhabi 2013, 2014, 2015 and 2016.
- Foodex Japan in Tokyo in 2015
- World Food Moscow in 2014 and 2015.
- Agriculture and Animal Resources Fair of Abidjan, Ivory Coast (SARA) in 2015
- SVB 2017 and 2018
- SIA Paris 2017 and 2018
- SIAL Middle East 2017 and 2018

To this end, several partnerships were concluded between the exhibitors and importers interested in Moroccan local products as part of B-to-B meetings organized during the event.



3.5 MOROCCAN CONTEST OF LOCAL PRODUCTS

The organization of the first edition of the Moroccan local products competition was part of PAMPAT project (Market access facilitation for selected value chains of typical food products in Morocco), funded by the Swiss State Secretariat for Economic Affairs (SECO) and implemented by the United Nations Industrial Development Organization (UNIDO).

Over 350 local product firms from all the regions in Morocco participated in the contest. The jury was made up of producers and consumers and awarded medals to the best products. A total of 109 products were awarded as follows :

- Honey category: 24 gold, 12 silver and 12 bronze medals;
- Edible oils category: 10 gold, 4 silver and 5 bronze medals;
- Animal products category: 2 gold and 2 silver medals;
- Fruit and vegetable products category: 5 gold, 2 silver and 13 bronze medals;
- Grain products category: 7 gold, 5 silver and 6 bronze medals.

Of the 48 products with gold medals, six excellence awards were granted to the following products: argan oil from Marrakech Tensift Al Haouz region, amlou from Souss Massa Draa region, Keskes Khoumassi from Oued Ed-Dahab Lagouira region, olive oil from Tadla Azilal region, and citrus honey and gouda goat cheese from Tangier Tetouan region. Also, ADA invited those who were granted the Award of excellence at the 2014 contest, to participate at the 6th edition of the Swiss competition for local products held in September 2015.

Thus, 4 local products from Morocco were present at the event, namely: argan, olive oil, couscous Khoumassi and amlou.

7 INSTITUTIONAL STAKEHOLDERS

7.1 MOROCCO FOODEX

About MOROCCO FOODEX

MOROCCO FOODEX was set up in 1986. Since then, its main missions involve the promotion of agricultural and marine export-oriented products and seen as pillars of the country's economic growth. Many tasks are assigned to the MOROCCO FOODEX. The include :

Technical control

MOROCCO FOODEX performs technical control of Moroccan agricultural and marine food products aimed for export

Exports' coordination

MOROCCO FOODEX chairs sector-based, specialized coordinating committees for the export of Moroccan agricultural and marine food products.

It also ensures the compliance with the technical requirements with reference to several conventions related to the export of Moroccan agricultural and marine food products.

Export Promotion & Marketing

MOROCCO FOODEX promotes the image and quality of Moroccan agricultural and marine food products in foreign target markets.

It organizes, sets up and participates in events or actions aimed at the promotion and development of Moroccan agricultural and marine food products exports, in Morocco and abroad.

Sector-based monitoring

It provides operational strategic watch on export markets for Moroccan agricultural and marine food products.

It helps small enterprises exports for the qualification and development of products intended for export.

MOROCCO FOODEX has 4 delegations in Europe that contribute to the technical surveillance and coordination processes by sending information on the status of the arrival of exported goods and their compliance with quality standards. They also track products from competitor states. Finally, MOROCCO FOODEX provides strategic information to Moroccan agricultural and marine food producters.

MOROCCO FOODEX
El Jadida road, Lissassfa AZBANE roundabout near the ZENITH Hotel , Casablanca - Morocco
Phone: +212 (522) 30.51.04/30.81.22 / Fax: +212 (522) 30.51.68/30.25.67
E-mail : eacce@eacce.org.ma - Website : www.eacce.org.ma



7.2 ADA : THE AGENCY OF AGRICULTURAL DEVELOPEMENT

The missions of ADA are mainly to oversee the implementation of "Maroc vert" Plan, and propose to the government authorities an action plan that will help the agriculture sector to achieve productivity improvements through:

- Mobilizing and searching for lands to extend the agricultural areas and develop high added valued crops;
- Adding value to agricultural products by establishing new irrigation systems, farm facilities, packaging and marketing;
- Promoting investments in agricultural and establishing partnership with investors.
- Developing the local product sector

ADA has to propose to government authorities' action plans which will help solidarity agriculture through the promotion and implementing projects that are economically viable in order to boost farmers' incomes.

AMONG ADA AGENCY MISSIONS:

- Conceive and design incentives and subsidies programs for the Agricultural investment Code. According to "Maroc Vert" strategic priorities, and its execution progress.
ADA Agency, proposes incentive actions according the contract between the Government and agriculture sector professionals.
- Promote domestic supplies in agricultural investments by organizing some events, communication campaign; in collaboration with the government authorities' and the other involved agencies;
- Facilitate and encourage partnerships that will help investors;
- Launch communication actions to better understand and address the needs of investors and the different actors of the agriculture sector;
- Assess and monitor all missions and actions.



7.3 ONSSA

ONSSA is The National Office For Food Safety. It was created in 2010 to support strategic orientations of "Maroc Vert" Plan. ONSSA is placed under the supervision of the Ministry of Agriculture, Fisheries, Rural Development, Water and Forests, with financial autonomy.

It exercises, on behalf of the Government, the attributions related to consumer protection, animal health and plant health. The regulations governing the function of ONSSA are included in a new Food law (established in 2011, inspired by the regulation CE 178/2002) that stipulates the basic principles and concepts for food safety, and requires all the food chain stakeholders to fully comply with standards to ensure food safety through the whole food value chain

A MODERN APPROACH OF CONTROL

The food safety system is a modern approach based on risk analysis, traceability of food products from the producer to the final consumer , animal identification, auto- control, sanitary licensing of establishments and a high responsibility of the private sector.

MISSIONS AND ATTRIBUTIONS

- Surveillance and sanitary protection of vegetal and animal patrimony at the national level and at borders;
- Sanitary food safety starting from primary products till the final consumer, including fish products and feed;
- Homologation and control of agricultural inputs (seeds, pesticides, fertilizers) and licensing of veterinary drugs;
- Implementation of laws and policies related to phytosanitary and veterinary sanitary measures.





El Jadida road, Lissassfa AZBANE roundabout Near the ZENITH Hotel , Casablanca - Morocco

Phone/Telefon : +212 (522) 30.51.04/30.81.22 / Fax: +212 (522) 30.51.68/30.25.67

E-mail : eacce@eacce.org.ma - Website/Webseite : www.eacce.org.ma