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MINISTRY OF AGRICULTURE, FISHERIES,
RURAL DEVELOPMENT, WATER AND FORESTS



وكالة التنمية الفلاحية
AGENCY FOR AGRICULTURAL DEVELOPMENT

الجيل الأخضر
GÉNÉRATION GREEN
2020 - 2030

INVESTOR'S GUIDE

IN THE AGRICULTURAL SECTOR IN MOROCCO



April 2024



His Majesty King Mohammed VI, may God assist him.

ABBREVIATIONS AND SYMBOLS



ADA	Agency For Agricultural Development
AELE	European Free Trade Association
AGR	Income Generating Activities
AMDIE	Moroccan Agency For Investment And Export Development
AMO	Compulsory Health Insurance
ANAPC	National Agency For The Promotion Of Employment And Skills
ANCFCC	National Agency For Land Conservation, Cartography And Cadaster
AOP	Protected Designation Of Origin
B.O	Official Bulletin
CDD	Fixed-Term Contract
CDI	Permanent Contract
EEC	European Economic Community
CFC	Casablanca City Finance
CICA	International Center For Agricultural Advice
CMC	National Identity Card
CNSS	National Social Security Fund
CNSSP	National Committee For The Selection Of Seeds And Plants
CP	Contract Program
CRJEA	Regional Center For Young Agricultural And Agri-Food Entrepreneurs
CTD	Contract For Determined Work
DAR	Directorate Of Rural Affairs
DCQ	Control And Quality Department

DDE	Department Of State Domains
DFD	Customs Free Request
DHS	Testing Of Distinctness, Homogeneity And Stability Variety)
DPA	Provincial Directorate Of Agriculture
DRA	Regional Directorate Of Agriculture
DSS	Strategy And Statistics Department
DUM	Dum Single Goods Declaration
EACCE	Autonomous Establishment Of Control And Coordination Of Exports
ESS	Social And Solidarity Economy
FAS	Free Alongside Ship
FBCF	Gross Fixed Capital Formation
FCA	Free Carrier
FDA	Agricultural Development Fund
FFS	Farmer Field School
FOB	Free On Board
GH	Large Hydraulic
GIE	Economic Interest Group
ha	Hectare
HACCP	Hazard Analysis Critical Control Points
IAA	Food Industry
IAV	Hassan II Institute Of Agronomy & Veterinary
IGP	Protected Geographical Indication

INDH	National Initiative For Human Development
INRA	National Institute For Agricultural Research
IR	Income Tax
IS	Corporate Tax
ISTA	International Seed Testing Association
LA	Agricultural Label
MAD	Moroccan Dirham
MAMDA	Moroccan Agricultural Mutual Insurance Company
MD-ICEPP	Delegate Ministry In Charge Of Investment, Convergence And Evaluation Of Public Policies
MdMAD	Billion (S) Of Dirhams
MEF	Ministry Of Economy And Finance
MI	Ministry Of The Interior
MMAD	Million(S) Of Dirhams
OECD	Organization For Economic Cooperation And Development
OCE	Marketing And Export Office
ODCO	Office Of Cooperation Development
GMO	Genetically Modified Organism
WTO	World Trade Organization
ONCA	National Agricultural Council Office
ONICL	National Interprofessional Office For Cereals And Vegetables
ONSSA	National Office For Food Safety
OP	Professional Organizations
ORMVA	Regional Agricultural Development Office

PAI	Industrial Acceleration Plan
GDP	Gross Domestic Product
GDPA	Gross Agricultural Domestic Product
PIF	Border Inspection Posts
PMH	Small And Medium Hydraulic
PMV	Green Morocco Plan
PNAEPI	National Program For Drinking Water Supply And Irrigation
PPP	Ppp Public – Private Partnership
R&D	Research And Development
UAA	Useful Agricultural Area
SDOQ	Distinctive Signs Of Origin And Quality
SGG	Sgg Generation Green Strategy
SMAG	Guaranteed Minimum Agricultural Wage
SMIG	Guaranteed Interprofessional Minimum Wage
SNCA	National Strategy Of The Agricultural Council
SNDD	National Sustainable Development Strategy
SVP	Provincial Veterinary Service
TIR	International Road Transit
TPME	Very Small And Medium Enterprises
VAT	Value Added Tax
EU	Eu European Union
USA	Usa United States Of America
VAT	Vat Agronomic And Technological Value



INTRODUCTION

Located in the northwest corner of Africa and bordered by the southern shore of the Mediterranean Sea, the western limit of the Maghreb and Arab world and at the gates of Europe, the Kingdom of Morocco has always been a crossroads of civilizations and today a crossroads of major regional groups.

Through its historic choice of opening to its environment and its desire to continue working for a better world, Morocco has accelerated the pace of conducting structural projects and has pushed, by capitalizing on its liberal orientation, its modernization on the political, economic, and social levels, to strengthen, as a result, the stability of the country.

Indeed, Morocco has embarked on a series of structural reforms with the aim of achieving strong and sustainable growth. Combined 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 sectorial development strategies that set the specific objectives for the different sectors and break them down into action plans and program contracts: fisheries (Halieutis Plan 2020-2030), Agriculture (Green Generation), Industry (PAI Industrial Acceleration Plan

2021-2025), logistics (Logistics Competitiveness Strategy), energy (National Energy Efficiency Strategy for 2030), crafts (The Development Strategy for the Crafts sector 2030);

- Improvement of economic infrastructure: Highway, railway, port and airport large scale projects;
- Supporting these projects with timely macroeconomic policy reforms: debt reduction, maintenance of macro-balances, trade liberalization, adequacy of taxation, etc.

Among these main sectors of activity, the agricultural and agro-industrial sector offer undeniable assets 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 agriculture through the improvement of framework conditions and the modernization of institutional, legislative, and regulatory mechanisms regulating economic activity and consolidating the attractiveness of the Kingdom vis-à-vis national and foreign investors.

The “Green Generation 2020-2030” strategy was designed and developed in accordance with his majesty King Mohammed VI’s High Guidelines for the implementation of the next-generation sectorial strategic plans. This new strategic vision for the agricultural sector is in line with the other structuring projects launched by His Majesty King Mohammed VI (may God assist him). Whether with the national drinking water supply and irrigation program (PNAEPI 2020 -2027), the integrated business support and financing program, or the roadmap for the development of vocational training, complementarities have been identified and synergies are to be unleashed.

The purpose of this strategy is to create a new market development opportunity that will stimulate new investments in the agricultural sector. This strategy aims to source more financing for development and seeks to maximize private-led investments, particularly for the benefit of the youths, by improving certain regulations, instruments and programs that impact private investment in the agriculture and agri-food sector.

This investors’ guide in the agricultural sector highlights the assets and potential that Morocco has to offer to investors and projects’ leaders in the agricultural, agroindustrial and Para-agricultural fields as well as the various aspects that characterize the business climate.

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ECONOMIC AND SOCIAL CONTEXT



BRIEF OVERVIEW OF MOROCCO



Located in northwest corner of Africa and 14 kilometers far from Europe through the Detroit of Gibraltar, the Kingdom of Morocco is a privileged bridge between Africa, Europe and the Arab world.

With an area of 710,850 km², Morocco is bordered at the west by the Atlantic ocean , with 2,934 km of coastline, and bordered to the north by the Mediterranean Sea with 512 km of coastline. This vast territory shares its borders to the east with Algeria and to the south with Mauritania.



This exceptional geographical location places Morocco as a strategic platform, both politically-economically and culturally.

Fact Sheet on the Kingdom of Morocco

Official name	Kingdom of Morocco
Capital	Rabat
Position	North Africa, 14 km from Europe
Political system	Democratic, parliamentary and social constitutional monarchy
Head of State	His Majesty King Mohammed VI (20th King of the Alaouite dynasty)
Currency	The Moroccan dirham (MAD)
Average exchange rate in January 2024	<p>1 EUR = 11.59 MAD 1USD = 10.64 MAD</p> <ul style="list-style-type: none"> ▪ GDP: MAD 1.284 billion ▪ Distribution of GDP by sector of activity: Primary sector: 13%, secondary sector: 30% and tertiary sector: 57% ▪ GDP growth: 7.9% (in 2021) ▪ Gross national disposable income: MAD 1.372 billion ▪ Inflation rate: 1.4% ▪ Imports of goods and services: MAD 539.6 billion ▪ Exports of goods and services: MAD 422.9 billion ▪ Investment rate (GFCF (*)/GDP): 32.2% ▪ National savings rate: 28.8%
Macroeconomic data in 2022	<ul style="list-style-type: none"> ▪ Population (2020): 35,951,657 inhabitants ▪ Labor force (2020): 44.8% ▪ Urban population (2020): 63.4% ▪ Life expectancy (2020): 76.9 years
Demographic data (Forecast)	<ul style="list-style-type: none"> ▪ Population (2020): 35,951,657 inhabitants ▪ Labor force (2020): 44.8% ▪ Urban population (2020): 63.4% ▪ Life expectancy (2020): 76.9 years
Official languages	Arabic and Amazigh. However, official and administrative documents are written in Arabic and French
Secondary languages	French, Spanish and English
Official religion	<p>Sunni Islam Moroccan Constitution guarantees free worship of other religions</p>
Time zone	GMT (GMT+1: Daylight Saving Time)
Climatic conditions	Mediterranean in the north, Atlantic in the west and Saharan in the south, the differences in climate are explained by the influence of various factors (the geographical location, the sea, the desert, the continent, the vCanary currents and the exposure to watersheds ...)

FEW FIGURES OF THE AGRICULTURAL SECTOR



Agriculture is an important pillar of development in Morocco. Its economic and social impact , its structuring association with the rural world, as well as the multiplicity of its functions concerning particularly the food systems, the economy, the social and environmental aspects , make it a natural engine of development.

The importance of the agricultural sector is reflected in its significant contribution to the national GDP and employment , especially in rural areas where agriculture remains the main source of employment and income for 1.5 million farmers.

The agri-food sector is one of the pillars of the economy with a production value of 161 billion dirhams. It is the first sector of national industry and one of the best development assets of the country (5% of GDP, 30 billion dirhams in added value or 26% of industrial GDP).



A notable contribution of 12 to 14% in GDP

An important reservoir of employment 35% of employment and source of income for 72% of the rural population



A significant contribution of foreign exchange through exports: 36.3 billion dirhams in 2018 or 13% of the total value



Balanced coverage of food needs: 65% for cereals; 47% for sugar; 99% for milk, red meats and white meats and 100% for fruit and vegetables.



- A considerable utilized agricultural area: 8.8 million ha, of which 1.6 million ha are irrigated.
- An important hydro-agricultural infrastructure: 148 large dams allowing the mobilization of 16.1 billion M3 of water, 87% of which is intended for agricultural use.
- Diversified agricultural production: 1,073,000 ha of olive trees, more than 250,000 ha of market gardening, 128,000 ha of citrus fruits, 21.6 million sheep, 6 million head of goats and 3.3 million head of cattle.



1.1 MACROECONOMIC ENVIRONMENT

Working continuously to improve the quality of its macroeconomic environment, Morocco has been engaged for several decades in a vast process of reforms and a dynamic of continuous improvement particularly concerning its political, social and economic aspects.

At the political level, the changes made in the constitution assure the conviction of the political leaders and their choice to democratize the institutions and to work for the political and social development of the country. In this regard, Morocco has known, since its independence, six constitutions promulgated respectively in 1962, 1970, 1972, 1992, 1996 and 2011. The latter is rightly seen as the mean to initiate a great democratic turning point.

The social aspect has also undergone many changes that have accelerated since the 2000s in order 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 has been made. Since 2005, human development has experienced a new impetus thanks to the National Initiative for Human Development (INDH).

The fight against poverty and precariousness has also gained momentum. Indeed, the appropriations allocated to the social sectors have steadily increased and an increase in social expenditure has been recorded in the recent years.

The framework Law No. 09.21 of 22 Chaabane 1442 (5 April 2021) on social protection, is a key step in the implementation of the guidelines of His Majesty King Mohamed VI, may God glorify him, on the generalization of social protection for the benefit of all Moroccans by 2025.

Education, for its part, has been the subject of a reform governed by the "Charter of Education - Training" which aims to improve the quality and education coverage and training, and to broadening the scope of education.

Finally, with regard to the economic aspect, Morocco has improved the stability of its macroeconomic framework and its business environment, strengthened the competitiveness of the country's productive apparatus and launch ambitious programs to develop infrastructure and stimulate promising sectors.

In this context, a commercial code was introduced in 1996 and has since continued to incorporate the macroeconomic changes experienced by the country. This was accompanied by other structural reforms such as those concerning corporate law, price freedom and competition and consumer protection.

In addition, the liberalization of the financial market has been carried out in stages: of credit deregulation, institution of partial convertibility of the dirham, reform of exchange rate flexibility, modernization of the banking sector and the financial market, creation of Casablanca Finance City (CFC). This last project aims to position Casablanca and through it Morocco, as a hub of finance on the regional and continental scale.

Morocco had also successfully pursued a program to control foreign debt and had worked actively to strengthen private investment, including the attraction of foreign direct investment, which was aimed at revitalizing its economy and strengthening its ties with its main partners.

For the attraction of national and international investors, the country's assets are multiple and complementary:

- **Competitive costs:** the country is a competitive export platform, mainly through wage costs and other production factors, export costs and tax charges;
- **Stable economic fundamentals:** as the result of the macroeconomic policies that advocate regular growth, inflation control and the public debt evolution...
- **Privileged access to a high-consumption market:** Thanks to the free trade agreements concluded and accession to the WTO, Morocco offers investors access to a market of nearly 60 countries, including those listed below, representing more than one billion consumers and 60% of global GDP: European Union (EU), United States of America (USA), Turkey, Arab countries...
- **Infrastructure to international standards:** The country has major infrastructures: major ports, including that of Tangier-Mediterranean, wide national highway network, good coverage by international airports, multitude of fully developed economic activity zones, efficient telecommunications system...
- **Qualified and efficient human resources:** Morocco has valuable human capital at the service of competitive investment and the creation of added value: youths and active population, adapted

levels of training, cultural openness, mastery of languages and new technologies, attachment to entrepreneurship, ability to adapt to changes in activities and competitive wage costs;

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

Finally, the sectorial strategies developed by Morocco adequately illustrate its ability to succeed in reforms and to control its development. In view of their importance, those adopted in economic terms are subject to the following sector strategies .

Sector strategies

Industrial Acceleration Plan PAI 2021-2025:

It is based on axes related to the strengthening and integration of Moroccan asset in industry and the encouragement of the creation of new sectors for the promotion of commercialization and products, with an emphasis on the regional dimension, with a view to guaranteeing industrial development at the national level.

It also aims to develop research and innovation and to promote technological capabilities through launching new future-oriented systems and adopting new production methods of the 4th generation of industrialization, as well as sustaining Morocco's natural resources.

Logistics competitiveness strategy:

The integrated national strategy for the development of logistics competitiveness aims to reduce logistics costs, accelerate GDP growth and contribute to the country's sustainable development by 2030. The projects identified in this framework are structured around five main axes. The aim is to provide the country with efficient logistics infrastructure.

National Energy Efficiency Strategy (on the horizon 2030):

The national energy strategy (on the horizon 2030) is based on 7 strategic orientations, namely:

- S1. An optimized electricity mix around reliable and competitive technological choices;
- S2. The rise of the share of renewable energies;
- S3. Energy efficiency as a national priority;
- S4. Domestic resource mobilization;
- S5. Regional integration;
- S6. The balance between domestic production and energy imports;
- S7. The implementation of a national pact for sustainable development.

The strategy provides for a number of accompanying measures:

- M1. The Energy Development Fund;
- M2. The organization and governance of the sector;
- M3. Communication aimed at mobilizing all citizens;
- M4. Promotion of training to support the strategy;
- M5. The establishment of governance and a code of regulation;
- M6. The incentive framework for private investment: financing;
- M7. The Energy Observatory.

National Port Strategy (on the horizon 2030):

A key link in external trade logistics chains, Morocco's ports are an important lever for development, whose performance plays a major role.

The new national port strategy for 2030 aims to support the evolution of the economy by anticipating the demand for port infrastructure and further integrating Morocco into global competitiveness.

The port landscape development strategy responds to multiple challenges, which relate to:

- The optimization of the competitiveness of the supply chain and the development of resources;
- Ensuring the security of strategic supplies;
- Accompanying economic changes;

- Strengthening the capacity of the port system to adapt to regional and international changes in order to seize geostrategic opportunities.

Halieutis Plan 2020-2030:

The overall objective of the Strategy for the Development and Competitiveness of the Fisheries Sector, known as "Halieutis", is to build a sustainable and competitive fishery, which enhances the country's fishing heritage and makes the sector a real engine of growth for the Moroccan economy.

Encouraging true upstream-downstream integration and aiming to improve cooperation between all the stakeholders for effective co-management of the sector, the Halieutis strategy revolves around three major axes:

- **Sustainability:** Ensure the sustainability of resources and make fishermen the first stakeholders of responsible fishing;
- **Performance:** Organize and equip the sector for optimal quality, from landing (transparency throughout the value chain) to commercialization (mechanisms for selling in efficient markets);
- **Competitiveness:** Valuing products in growing markets by ensuring the availability and regularity of a quality raw material.

The development Strategy for the Crafts' Sector (on the horizon 2030):

The strategy of the crafts' sector for the period 2021-2030 is articulated around 4 strategic axes and 15 concrete transformation programs.

The first axis "structuring and support of the stakeholders " aims to implement differentiated support mechanisms, to guarantee a move upmarket of the crafts' offer, as well as a strengthening of the resilience and competitiveness of the stakeholders .

The second axis, "modernization of artisanal sectors," is based on targeted actions covering the entire value chain. The third axis involves "valorization of the human factor" through enhancing the qualification levels of artisans, showcasing their authentic expertise, and supporting their social inclusion, particularly focusing on female artisans and vulnerable individuals within this sector.

The third axis consists of “valuation of human capital” through improving the level of qualification of craftsmen, valuing their authentic know-how and supporting their social inclusion, especially women artisans and the stakeholders in vulnerable situations.

The fourth axis focuses on “improving the sectorial framework” through the strengthening of sectorial monitoring as well as the optimization of the organization of the sector.

Tourism Development Strategy (on the horizon 2030):

This strategy is based on three main axes, namely the strengthening of aviation through the increase of capacity and the multiplication of point-to-point flights, the alignment of the tourism offers with national and international demand, and finally the stimulation of public/private investment around priority levers including animation and ecotourism.

National Strategy of Social and Solidarity Economy (SSE):

It is a strategy focused on the development and promotion of SSE by and for its stakeholders in the territories, diversifying the areas of intervention in order to meet Morocco's challenges and offer a privileged framework for sustainable development, while guaranteeing economic efficiency in the service of the social interest.

The objectives of this 2030 strategy are as follows:

- 7.4% contribution of SSE to national GDP;
- Creation of 410,000 SSE organizations;
- Contribution to employment: 8.9% SSE participation in employment and 16.4% SSE penetration in the employed labor force.

Long-term low-carbon strategy, Morocco (on the horizon 2050):

In its 2050 Low Carbon Strategy, Morocco explores the different paths that should lead to a single objective: a sustainable national industrial ecosystem, competitive locally and internationally and conducive to innovation. Thus, all the actions to be planned in order to make this transition will have to gravitate around two vital, even decisive, poles, namely technology and R&D. Energy efficiency, greening

of public procurement, green taxation, capitalization on successful experiences for an industrial take-off towards green industries.

National Financial Inclusion Strategy:

The strategy aims to accelerate the integration of unemployed youths and the revival of Income Generating Activities (IGAs) and MSMEs affected by the health crisis. for this purpose, microfinance, banking offers, particularly within the framework of the INTELAKA programs, as well as alternative financing models are key instruments to boost economic growth.

Similarly, to achieve financial inclusion, support mechanisms are strengthened, in particular to support MSMEs following a sectorial approach.

The strategy accompanies the reform of social protection, which aims to protect poor and vulnerable segments of the population against risks related to illness, job loss or old age. In order to optimize the impact of this societal project on poverty reduction, this strategy implements specific measures for the establishment of inclusive channels, in particular through the dematerialization of flows and for the strengthening of citizens' capacities in terms of budget management, savings and investment.

National Digital Transformation Strategy:

The Kingdom's digital transformation strategy aims to meet the expectations of citizens, businesses and administrations while taking into account the production chains of digital services.

Its main objective is to obtain concrete commitments from governments in favor of participatory democracy by putting the citizen at the heart of the management of public affairs by promoting transparency, citizen empowerment, the fight against corruption and the exploitation of new technologies to strengthen good governance.

Integrated Business Support and Financing Program:

The effective launch of this program took place on February 3, 2020, thus offering new prospects to micro-enterprises, VSEs and auto-entrepreneurs having difficulty accessing finance in general, including in the rural world.

The financing offer relates to repayable credits intended to finance:

- Capital expenditure;
- Operating expenses.

National Program for Drinking Water Supply and Irrigation (PNAEPI):

This program, which covers the period 2020-2027, was developed following the high Royal instructions and is considerably strategic as it addresses the important issues related to water in a context where the effects of climate change have become a reality.

This program aims to accelerate investments in the water sector to secure drinking water supply and irrigation and strengthen our country's resilience to climate hazards and disruptions.

Cities of Trades and Skills Program:

The "Cities of Trades and Skills program", the backbone of the new roadmap for the development of vocational training, aims to inaugurate a new generation of vocational training institutions, promoting the employability of the youths, the competitiveness of companies and the creation of value at the territorial level. As such, it provides for the creation of 12 Cities of Trades and Skills which will be multi sectorial vocational training platforms and will welcome each year, a staff of 34,000 trainees.

1.2 SGG: ASSOCIATED DIRECTIONS, STRATEGIES AND PROGRAMS

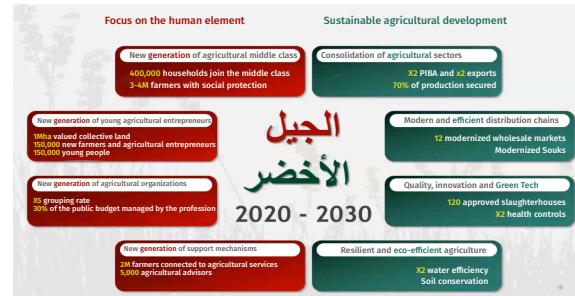
ADOPTION OF THE GENERATION GREEN STRATEGY 2020-2030

Launched by His Majesty King Mohammed VI in February 2020 may God glorify him, the "Green Generation 2020-2030" Strategy is inspired by the High Royal Guidelines contained in the speech delivered by the Sovereign on October 12, 2018.

The "Green Generation 2020-2030" Strategy consolidates a set of achievements of the Green Morocco Plan while focusing on areas for improvement and new challenges, in order to reach a new level in agricultural development.

The new strategy is based on two foundations:

- **The first foundation prioritizes the human element.** It aims to contribute to the emergence of an agricultural middle class, to energize rural youths, to develop human capital and to further structure farmers around successful agricultural organizations;
- **The second foundation is the sustainability of agricultural development.** This foundation, strongly linked to the human element, aims to consolidate the achievements of the Green Morocco Plan, while making a qualitative and technological leap, through specific actions on agricultural sectors, distribution chains, quality and innovation, as well as in terms of preserving natural resources and strengthening the resilience of the sector.



Foundation 1: Focus on the human element.

As its name suggests, the "Green Generation 2020-2030" Strategy places the human element at the heart of its concerns. The implementation of this first foundation will involve four specific axes:

Axis1: the emergence of a new generation of agricultural middle class by allowing 400,000 households to access it, stabilizing 690,000 households through four levers, including:

- Improving farmers' incomes through continued investment efforts accompanied by a new model of expanded and targeted incentives;
- The extension of agricultural insurance to a large proportion of farmers, to eventually cover 2.5 million hectares, in order to protect them against production hazards;
- The establishment of a special framework for farmers allowing more than 3 million farmers and agricultural workers to benefit from the social protection services;
- Reducing the gap between SMAG and SMIG and improving the working conditions of agricultural workers.

Axis 2: the development of a new generation of young agricultural entrepreneurs. The aim is to create opportunities for youths and to strengthen the attractiveness of the agricultural sector in order to ensure the continuity of agricultural development. The realization of this axis will be conducted through:

- The implementation of innovative mechanisms allowing a fluid intergenerational transmission of farms to ensure the continuity of the development of the agricultural sector;
- The establishment of a value offer around 1 million hectares of collective land generating jobs and activities and which will target the youths but also the collective lands communities;
- The deployment of dedicated offers, including financial support, support, insurance and social security, enabling 180,000 new young farmers to start their activities;
- Support for entrepreneurship in agricultural, Para-agricultural and transformation services allowing the creation of 170,000 jobs in these fields;
- A training and vocational qualification strategy aimed at training 150,000 graduates, including 10,000 in higher education and 140,000 in technical training and agricultural qualification.

Axis 3: the advent of a new generation of agricultural organizations whose objective is to improve the integration of farmers into value chains as well as the conditions of exercise of farmers in their activities ranging from access to markets, access to technological progress, including training. This can be achieved through:

- The structuring of the fabric of the stakeholders, the grouping and aggregation of farmers around efficient agricultural organizations (cooperatives, aggregation, or any other grouping around a common need or interest) to achieve, in the long term, a grouping rate of 25%;
- The empowerment of the profession (Inter professions and Chambers of Agriculture) through the direct management of 30% of the public budget by the profession.

Axis 4: the creation of a new generation of support mechanisms through the reform and modernization of support mechanisms for farmers to professionalize agriculture. These are:

- Massive and expand agricultural advice through a reform of its legal and governance framework and a strong involvement of private operators to reach 5000 agricultural advisors;
- Strengthen digital agricultural services to enable 2 million farmers to connect to e-services. In the same context, digital will be used as a lever to support farmers and will offer opportunities that generate activities and income, particularly for the benefit of the youths;
- Enrich and strengthen the support system for a new generation of solidarity agriculture projects that should spread over an additional area of 350,000 to 400,000 ha.

Basis 2: Sustainable agricultural development

Closely linked to human development, the second foundation of the "Green Generation 2020-2030" Strategy concerns the sustainability of agricultural development, through specific actions. The implementation of this second foundation is based on the following four axes:

Axis 1: the consolidation of agricultural sectors. This priority aims to further develop agricultural sectors through more targeted intervention on upstream agriculture and a reallocation of efforts downstream. These objectives can be achieved through five levers.

- The maintenance of the investment effort and the rationalization of incentives on upstream agriculture with a goal of doubling agricultural GDP to reach 200 to 250 billion dirhams by 2030;
- The maintenance of the production momentum that has been at the origin of the dynamization of Moroccan agricultural activity with a goal of multiplying the rates of return by 1.5. This is done through the adaptation of upstream incentives according to the specific needs and challenges of each sector and the conclusion of a new generation of program contracts;
- Support for export competitiveness. It is a question of doubling the value of Moroccan exports to reach 50 to 60 billion dirhams;
- The implementation, at downstream level, of acceleration measures to achieve a recovery rate of 70% of production;

- The emergence of promising new sectors with high added value such as organic, which should accommodate 100,000 ha of new plantations.

Axis 2: the establishment of modern and efficient distribution chains through the improvement and modernization of distribution channels for agricultural products, including wholesale markets and souks. To achieve this axis, 12 wholesale markets will be modernized, as well as the rehabilitation of traditional local markets across the Kingdom, in coordination with the concerned ministerial departments. The ultimate objective is to maximize the value captured by farmers and improve the quality of products sold to end consumers.

Axis 3: improving quality and innovation capacity. The deployment of this axis will allow Morocco to comply with international standards, to meet the expectations of Moroccan and foreign consumers and to make the Moroccan origin as a guarantee of quality via many levers, including:

- The multiplication by 1.5 or even 2 of investments in research & development for a better dissemination of innovations and agro-tech perceptions;
- The registration of 30 to 50 new varieties in the official catalogue;
- The strengthening of quality, standardization and sanitary control, which will lead to the approval of 120 slaughterhouses, multiplying effective controls and the identification of 100% of the Moroccan herd, with the aim of reducing risks for consumers and improving access to export markets;
- Access to digital agricultural services that should cover the areas of traceability, consulting, commercialization, mobile payment and agricultural insurance.

Axis 4: the establishment of a more resilient and eco-efficient agriculture, through multiplying the water efficiency, the conservation of agricultural soils and the support of farmers in the transition to renewable energies. Concretely, it is a question of investing in water and energy efficiency in order to preserve natural resources while creating new income- and employment-generating activities. This axis is based on three levers:

- Double water efficiency (added value per m³ of water) through the implementation of the irrigation component in the national drinking water supply and irrigation program, the continuation of

- irrigation and agricultural land management programs and the mobilization of non-conventional water resources;
- Promote renewable energies in the agricultural sector by supporting farmers' energy transition to renewable energies;
- Continue efforts to disseminate soil conservation technologies.

DEVELOPMENT OF THE COMMERCIALIZATION OF LOCAL PRODUCTS

The strategy of development of the commercialization of local products has been devoted to the development of this sector in terms of labeling, valorization, promotion and commercialization. Two major orientations have been adopted in this strategy, namely:

- Revisit the commercialization mix, by making improvements to products, packaging, pricing, promotion and labeling;
- Finding market access routes by strengthening links between producers and distributors in domestic and foreign target markets.

Local products should thus allow a viable and sustainable development of remote or hard-to-reach areas. To do this, the priority levers for actions selected are located at different levels of the value chain and are reflected as follows:

- Lever 1: Development and upgrading of local products producers;
- Lever 2: Establishment of regional logistics and trade platforms;
- Lever 3: Improved access to modern distribution markets at the national and the international level;
- Lever 4: Supporting labeling efforts through ensuring in particular the recognition of labels and their recognition by consumers;
- Lever 5: Realization of institutional campaigns to promote the local products and official labels among the end consumers.

Since the adoption of the Law 25-06 on the Distinctive Signs of Origin and Quality (SDOQ), 74 local products have been labeled.

Also, the Agency for Agricultural Development has established, since 2016, a collective label "Terroir du Maroc" as a collective mark under the Ministry of Agriculture, Fisheries, Rural Development and Water and Forests, in order to regularize the use of the term Moroccan local products and to promote and highlight Moroccan local products in order to improve the income of the small producers.

PROGRAM TO MODERNIZE IRRIGATION SYSTEMS AND IMPROVE WATER VALORIZATION :

The modernization of irrigation systems is one of the priority actions in the reforms undertaken in the field of agricultural water in Morocco; it aims to continue the initiatives undertaken under the PMV to develop a resilient and eco-efficient agriculture in the Green Generation Strategy. More specifically, it aims to improve the efficiency of irrigation networks, water service and adaptation to the context of increasing scarcity of water resources.

Thus, this program will focus on the modernization of collective irrigation systems and the improvement of the valorization of irrigation water through the equipment of drip irrigation farms:

a. Modernization of collective irrigation systems:

By 2030, the program will focus on the modernization of collective irrigation systems, at the level of the perimeters of the Great Hydropower of Tadla, Gharb, Loukkos, Moulouya, Haouz, Doukkala and Souss Massa, on an area of 110,000 ha distributed as follows:

- The completion of collective modernization projects on 70,000 ha;
- The launch of collective modernization projects on an additional 40,000 ha.

b. Equipment of farms with drip irrigation

In addition to the modernization of collective networks, the program provides for the plot's equipment with irrigation systems on an additional area of 350,000 ha. This area will be equipped either as part of individual projects or as part of collective modernization projects and will be financed by financial assistance granted under the EAF.

Program Cost

The cost of the modernization program is estimated at MAD 14.8 billion, distributed as follows:

- Modernization of external networks: MAD 3.3 billion;
- Farms Equipment with drip irrigation: MAD 11.5 billion.

Program Impacts

The main expected impacts are as follows :

- Multiplying water valorization;
- Saving and valorization of more than 2.5 billion m³ of water annually (by 2030);
- Preservation of water resources and mitigation of the impacts of climate change;
- Improvement of water service through modern tools for irrigation management;
- Increased incomes for farmers and the emergence of a new generation of agricultural middle class;
- Creation of employment opportunities for the rural youths' entrepreneurs in the upstream and the downstream agricultural production services (service cooperatives).

NATIONAL AGRICULTURAL ADVISORY STRATEGY

Developed in 2010 to support the implementation of the Green Morocco Plan, the national agricultural advisory strategy (SNCA) is based on a new approach to advice and support the stakeholder's, in a participatory, bottom-up, innovative, effective and better focused approach on the real needs of the stakeholders mainly in priority sectors.

This strategy thus consists of setting up a target advisory system based on the progressive empowerment mainly for the stakeholders. The state regulates and stimulates the development of private agricultural advice while remaining the warrant of a local public service to farmers. Private stakeholders are empowered to relay the action of the State. The redesign of the national system is designed to:

1-Go beyond the logic of traditional extension, by equipping producers with the ability to define their needs, specify their objectives, control their actions and, more broadly, the management processes of their production units;

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

Three main guidelines are set in the scope of this strategy:

- Plurality: through the involvement of the stakeholders with clear and complementary missions to ensure the concerted implementation of structured and effective actions on the one hand and the multiplicity of tools, channels and actions on the other;
- The adoption of a "bottom-up" approach to ensure a customized and local service;
- The integration of innovative tools (virtual networks, specialized websites, radio, television, SMS, call center, interactive terminals, etc.) into the national supervision and advice system.

It revolves around three strategic axes:

- Revitalization of the government's mission :

Through providing to stakeholders with a network of close and efficient agricultural advisory entities as well as the development of a global knowledge management system.

- The development of private agricultural advice:

The overall farm advisory system will be strengthened by a new profession of private agricultural advisors who will complement the offer for farmers and professional organizations.

- 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 useful and practical agricultural advice.

Organizational arrangements :

Created under the Law 58-12 that is promulgated by the Dahir No. 1.12.67 of 4 Rabii I 1434 (16 January

2013), the National Office of Agricultural Counseling (ONCA) is responsible for steering, coordinating and monitoring the implementation of the agricultural counceling strategy at the national level. A public institution with legal personality and financial autonomy, ONCA is administered by a board of directors and managed by a Managing Director.

a. Missions :

The National Office of the Agricultural Council is responsible for implementing the government's policy on agricultural advice, in particular through:

Farm advice:

- Provide advice to farmers on the control of diseases affecting plants and animals;
- Assist and support farmers in their efforts to enable them to access the incentives and financial subsidy provided for by the legislation and regulations in this regard;
- Develop and apply innovative methods in agricultural advice, in particular through new information and communication technologies and audiovisual media;
- Provide agricultural advice based on the gender approach for a better inclusion of the rural women.

Support and supervision of professional organizations:

- Provide support, supervision and advice to professionals in agricultural production sectors in terms of production techniques, valorization, commercialization and farms' management;
- Support professionals in the design and implementation of innovative agricultural projects and aggregation.

Support for actions undertaken by other agricultural development bodies:

- Carry out actions in the commercialization of agricultural inputs;
- Contribute with the services of the Ministry of Agriculture to the collection of data relating to the agricultural sector;
- Contribute to the monitoring of solidarity agriculture projects in the field.

The interface with training and research:

- Provide continuing education in the field of farm advisory and carry out professional development programs, in particular through agreements with professional organizations, chambers of agriculture and national training and research institutions;
- Disseminate the results of applied research and modern methods of production, valorization and commercialization of agricultural products.

b. Areas of intervention

ONCA provides support, supervision and advice to farmers, their professional organizations and professionals in agricultural production sectors through a multitude of management, exploitation, production and valorization techniques.

In this regard, and to ensure the sustainability and consolidation of the achievements of the PMV as well as the implementation of the "Green Generation 2020-2030" projects. ONCA has begun with its institutional and professional partners the regional declination of the Green Generation strategy in order to establish and strengthen these two foundations through the contribution to:

- The emergence of a new generation of young agricultural entrepreneurs, a new generation of agricultural organizations, a new generation of support mechanisms and a new generation of solidarity agriculture projects;
- The consolidation of agricultural sectors: Continue the development of sectors, through a more targeted intervention on the upstream and the reallocation of efforts on the downstream;
- Quality, innovation and Green-Tech: Improve the quality of production and adapt it to agricultural trends and new consumption patterns;
- Resilient and eco-efficient agriculture: Invest in water and energy efficiency to preserve natural resources and create new income- and employment-generating activities.

To facilitate access to information and knowledge, farm advisory services will use various innovative channels and media to diversify the means of communication and advice and to reach the maximum number of farmers, through the establishment of new farm advisory channels such as :

- The establishment of field schools (FFS) by sector and region;
- The organization and implementation of agricultural advisory programs with the various institutional and professional partners;
- The development, production and distribution of the brochure in Arabic "Dalil al fallah" for farmers, in more than 30 crop and animal production sectors;
- The production of educational agricultural advisory films;
- The production and dissemination of agricultural advice spots;
- Production and broadcasting of agricultural advisory television and radio programs and programs;
- The design and production of digital agricultural advisory materials (Podcasts, Storytelling and Flip-book);
- The establishment of the ONCA institutional website www.onca.gov.ma ;
- The operationalization of the agricultural information and advisory center 0802002050;
- The development of an ARDNA communication and consulting support platform www.ardna.org;
- The continuous presence on the main social networks (Facebook, YouTube, Twitter...);
- The implementation of interactive terminals;
- Providing agricultural advisors with soil, water and oil test kits, disease prevention tools and diagnostic tools;
- The provision of means of communication (tablets, GPS) to agricultural advisors to facilitate their access to the agricultural information management database;
- The development of the skills of agricultural advisors, a major axis of ONCA's intervention, through the implementation of a multi-year training plan that meets the real needs of beneficiaries;
- Strengthening and continuous monitoring of the skills of public agricultural advisors;
- The organization of Itinerant Agricultural Advisory Villages;
- The organization of agricultural events and activities;
- The organization of agricultural advisory desk in the advisory areas of major agricultural events.

The National Office of Agricultural counseling operates in an environment that offers opportunities for partnerships and cooperation.

In line with its prerogatives, particularly with regard to the support and supervision of professionals, ONCA establishes partnership agreements with the main stakeholders of the agricultural advisory system to ensure complementarity and pooling of the means and resources mobilized and / or mobilized by these stakeholders .

ONCA is also strengthening its activities by establishing several cooperation agreements with international organizations and agencies on technical cooperation projects, mainly to develop the capacities and skills of human resources and promote the use of new channels for disseminating information.

c. Organization

The National Office of Agricultural counseling is designed to meet the missions of the agricultural council, through an organization dedicated to farmers at regional, provincial, and local level:

- 12 Regional Directorates;
- 50 Provincial services;
- 300 Local Farm Advisory Centers.

Knowledge Management System

It is based on the full contribution of multiple public and private stakeholders at different levels, including:

- The International Centre for Agricultural Advisory Services (CICA);
- The Regional Center for Young Entrepreneurs in Agriculture and Agroindustry (CRJEA);
- The Pillar II Resource Centre (CRP2);
- Regional Chambers of Agriculture (12);
- Research and training institutes, namely: the National Institute for Agricultural Research (INRA), the Hassan II Agronomic and Veterinary Institute (IAV), the National School of Agriculture of Meknes (ENA) and the National School of Forest Engineers (ENFI) which has formed a Consortium to federate the efforts of researchers at the national level;

- Professional Organizations (POs) and Inter-Professions (NPs);
- Input suppliers;
- Public and private practices;
- Other stakeholders such as MAPMDREF partners (Central Directorates of concerned departments, ADA...), farmers and international organizations.

The overall functioning results from the distribution of missions between:

- The State, which plays a central role in defining strategic orientations as well as in the planning and execution of part of the agricultural council. It regulates and stimulates the development of the Private Agricultural Council while remaining the guarantor of a local public service to farmers;
- Other public and private stakeholders ensure the exchange of information and experience and the execution of farm advisory actions and support for farmers in their projects.

d. Private agricultural advice

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

- The political opportunity offered by the new agricultural development strategy "Green Generation" for improving the quality of supervision services;
- The advances achieved by research and professionals in the field of diversification of agricultural production and which require the improvement of the approaches and knowledge of managers in charge of supervision;
- The efficiency of the current framework system, which is affected by insufficient human and budgetary resources, cannot meet the needs of the various stakeholders;
- The establishment of a single or specific interlocutor (subject specialist) for a given problem for the farmer and its availability at the level of all agricultural areas.

It is with this in mind that the Department of Agriculture has developed the Law 62-12 on the organization of the agricultural counseling profession (published in the Official Bulletin No. 6259-26 of 26 rajab1435 (May 26, 2014)), which defines the legal framework for the practice of rational, operational consulting and vector of innovations and positive changes.

Law 62-12 sets the following objectives :

- Professionalize the supervisory activity and prepare the emergence of an operational and effective body of agricultural advisors and consultants;
- Encourage the organization of producers and production chains and promote the ownership of agricultural development by the concerned stakeholders;
- Develop employment opportunities for graduates of higher education and agricultural vocational training institutions;
- Set up a relay of the State in a contractual framework, for the supervision of producers and professional agricultural organizations.

The decree n ° 2.14.527 is part of the implementation of the provisions of this law; it is published in the Official Bulletin n ° 6334 of February 12, 2015. This decree specifies and refers to the orders established by the MAPMDREF and which concern:

- 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 advisor;
- The models of the Curriculum Vitae and the declaration on honor to accompany the application for accreditation to practice the profession of agricultural advisor;
- The appointment of three (03) professionals within the national commission of agricultural advice, representing three agricultural production sectors, for a period of three years;
- The qualification program and the list of agricultural higher education and vocational training institutions for granting the certificate of qualification entitling them to practice the profession of agricultural adviser;

- The model of the farm council register and its general conditions.

AGRICULTURAL TRAINING AND RESEARCH STRATEGY

Accompaniment of Higher Agricultural Education:

Public Agricultural Higher Education is currently provided by three institutions under the supervision of the Ministry of Agriculture, Fisheries, Rural Development and Water and Forests, they carry out their missions within the framework of the national policy of higher education set out in Articles 25 and 26 of Law No. 01.00 on the organization of higher education. These establishments are:

- The Hassan II Agronomic and Veterinary Institute (IAV) in Rabat and its Horticultural Complex in Agadir;
- The National School of Agriculture of Meknes (ENA);
- The National School of Forest Engineers (ENFI).

The main missions of Agricultural Higher Education Institutions are :

- Initial and continuous training, particularly in the agricultural fields;
- Preparing the youths for integration into working life;
- Scientific and technological research and the dissemination of knowledge related to their fields of training.

These establishments support the development strategy of the agricultural sector "Green Generation 2020-2030" which is based on one of the two foundations, namely the valorization of the human element, through training 10,000 laureates by 2030 in the fields of production, transformation and commercialization of agricultural and forestry production.

Strengthening agricultural technical education and vocational training:

The current agricultural vocational training system consists of 54 establishments comprising 24 Agricultural Technical Institutes Specialized in Agriculture (ITSA), 15 Agricultural Technical Institutes (ITA) and 15 Agricultural Qualification Centers (CQA) training skilled workers. This system also has 8 Agricultural High Schools, preparing for the high school degree in Agricultural Sciences. These institutions also provide apprenticeship training for rural youth.

The missions assigned to this training system are:

- Meeting the sector's needs for qualified human resources and improving the technicality and competitiveness of companies and farms;
- Contribution to the implementation of national education and vocational training policies;
- Support for the socio-professional integration of the youths.

The agricultural vocational training offer is diversified and is constantly evolving in line with the orientations of the Generation Green strategy, which aims to train 140,000 graduates by 2030. It covers different agricultural trades in 40 sectors distributed as follows:

- 19 sectors for the Specialized Technician level (Management, Topography, Rural Hydraulics and Irrigation, Poultry Farming, Livestock, Input commercialization, Agribusiness, etc.);
- 8 sectors for the Technician level (Horticulture, Livestock, Poly-culture Livestock, etc.);
- 11 sectors for skilled workers (Agricultural Mechanics, Animal and Plant Production, Installation of irrigation systems, Valorization and cutting of meat, etc.).

The device also offers apprenticeship training for the rural youths in 20 trades covering the fields of breeding, crop production and mechanization.

All the training provided is structured around theoretical modules coupled with practical training at the training sites and at the level of companies and farms. More than 5000 internship supervisors participate in the practical training of trainees and apprentices.

Support for agricultural research and development:

Moroccan agriculture faces many challenges that require developing resilience in ecosystems weakened by global changes, and developing the sustainability and competitiveness of priority and emerging sectors so that they can participate in Morocco's economic development while preserving its natural resources.

The research and development programs conducted, in particular by INRA, which is the national institution whose mission is to undertake research for agricultural development, are aligned with the national priorities expressed in the roadmap that outlines the Generation Green 2020-2030 strategy in

its research, development and innovation component in a prospective manner. INRA has opted for an open approach that promotes stakeholder engagement to ensure the relevance of its programs to their needs and to involve them in the implementation of these programs with a view to the adoption of future research results.

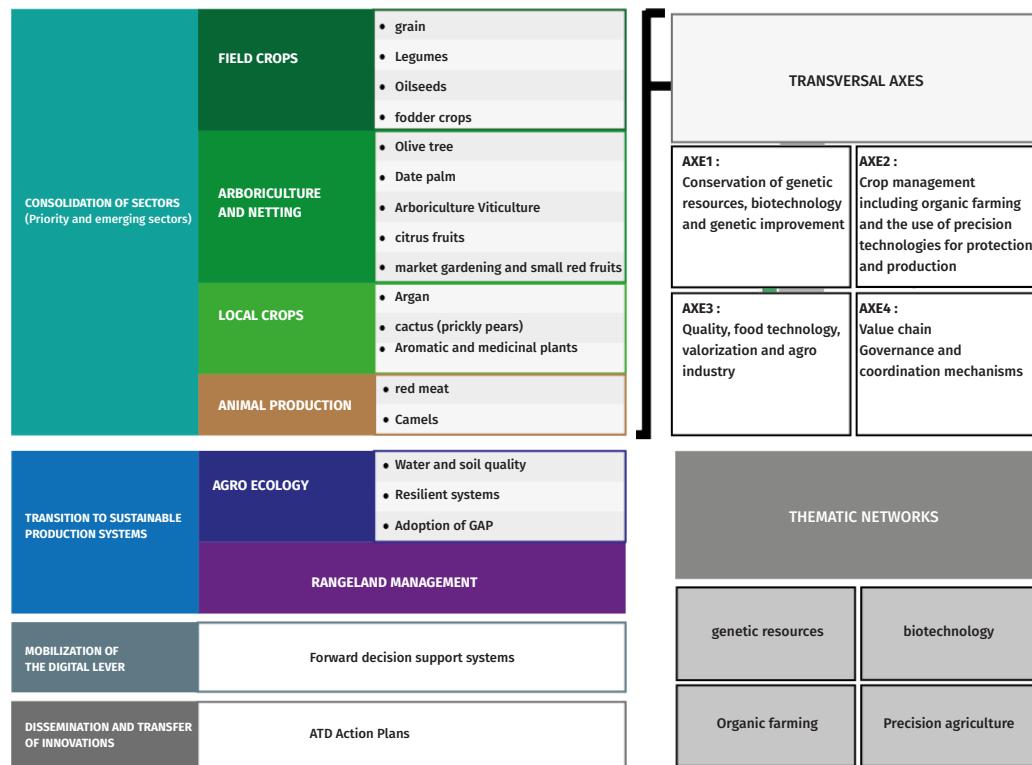
INRA's program for the period 2021-2024 is made up of four main priorities :

1. Consolidation of priority and emerging sectors: research that concerns the consolidation of sectors with the aim to increase yields, diversify supply, enhance products and organize value chains. With regard to the tree plants , this priority has been articulated around four lines of research, namely: (i) varietal selection and genetic improvement with all that this implies in terms of biotechnological tools to be adopted and genetic resources to be conserved and valued; (ii) improving crop production and protection techniques for sustainable yield optimization by using modern and efficient technologies that promote ecological practices and exploit the tools of precision agriculture; (iii) The valorization of agricultural products in post-harvest by highlighting their quality criteria, their characterization, and also by the development of conservation and transformation techniques and the enhancement of the reputation of local products for labeling; (iv) Study of value chain governance and coordination mechanisms for a better synergy between actors and complementarity of interventions.
2. Transition to sustainable production systems: The sustainability of production systems is a very complex research topic because economic, social and environmental requirements must be taken into account simultaneously while taking into account their dynamics and their effects on the capacities of production systems. Recognizing the need to contribute to economic and social development through the exploitation of natural resources, the objective will be to promote agricultural and pastoral systems that are resilient to climate change, resource-efficient, and provide environmental services through ecological management of resources and biomass produced. By adopting innovative approaches to generate and monitor multiple effects, INRA intends to contribute to the sustainable management of agricultural and pastoral areas.
3. Mobilization of the digital lever for forward management: The application of digital technologies is not new at INRA. Many programs have combined remote sensing, geographic information systems and global positioning systems with concepts related to natural resources and vegetation cover to

produce decision-support tools such as cereal crop prediction systems and agricultural land use maps. Nevertheless, the digital revolution is underway. Information management tools from databases or different types of sensors are becoming increasingly efficient. The multitude of information to be processed offers increasingly scalable and sophisticated applications to meet the needs of national agriculture. Many start-ups have invested in this market in Morocco and have expressed their wish to undertake collaborative projects for the adaptation of precision agriculture technologies to different agricultural production sectors. For this, INRA has included under the priority "Consolidation of sectors" several research projects that interest the use of precision agriculture tools in crop management. Under this priority, INRA will deal with research themes on a broader scale concerning the agricultural vocation of land and climate change, monitoring the dynamics of climate-sensitive agricultural systems and agro-economic modeling. In addition, several digitization and data structuring actions will be programmed at INRA, in particular the implementation of a large database of data generated by research (Big Data).

4. Diffusion and transfer of innovations: The diffusion and transfer of innovations is essential to enable farmers to have rapid access to new knowledge and technologies, and to advice that guides them in their activities and investment projects. With regard to the transfer of seeds and seedlings, INRA supports this action with a small- and large-scale demonstration program that also includes other technologies and practices developed specifically for this genetic material. The transfer concerns pre-basic seeds of field crop varieties to seed companies, budding strains to date palm vitro-plant production laboratories, and healthy grafts of fruit tree seedlings to approved nurserymen. The demonstration of technologies and good agricultural practices is a good way to exchange experiences and inform the interested public. However, more interaction is considered in the action plans of the research and development departments whose approach is based on diagnosis, verification of results with users, their dissemination and evaluation of their impact. In this sense, local support through schools in the fields will be offered to groups of pilot farmers in collaboration with ONCA, in addition to interactive training sessions that INRA intends to offer to cooperatives on biomass or food product valorization technologies. INRA also intends to adopt the "living lab" approach for several research themes, whether for the consolidation of priority and emerging sectors or the transition to sustainable production systems.

In addition to its vertical and disciplinary organization, the Medium-Term Research Program MTRP 2021-2024 includes four thematic networks that share interest in research on genetic resources, biotechnology, organic agriculture and precision agriculture. These thematic networks, in continuous interaction, combine their efforts to achieve their objectives within the megaprojects to which they belong and their collective objective of the thematic network which is to collaborate and share best practices for the creation of new knowledge and innovations.



1.3. ASSETS AND INVESTMENT POTENTIAL IN THE AGRICULTURAL SECTOR

ASSETS AND INVESTMENT POTENTIAL IN MOROCCAN'S AGRICULTURAL SECTOR

Various opportunities arise for investors in the agricultural sector in a stable and promising business environment. These opportunities focus on the mobilization of agricultural land, equity participation, Agri-business, and the development of Agro-industry.

Regarding the mobilization of agricultural land, it is the long term leasing of the state owned farmlands (17 to 40 years) via calls for tenders that are launched periodically by the Agency for Agricultural Development as part of the Public-Private Partnership between private investors and the Moroccan State. In this context, investors undertake the following measures:

- Comply with the pre-requisites of the call for tender's specifications;
- Carry out economically viable agricultural or agro-industrial projects that are technically adapted to the agricultural potential of the concerned area.

The State's commitments relate to the following:

- Providing investors with state owned farmlands at a specific leasing rate once being awarded in the call for tenders.
- The possibility of extending the leasing period.

With regard to equity participation, investors have the possibility to integrate operational public-private partnership projects through equity participation in companies set up for this purpose. This participation can be made up to 66% of the company's capital for projects in progress, and 100% of the company's capital for projects whose investment programs are completed.

These projects have areas ranging from 20 Ha to 700 Ha and concern mainly the following 8 sectors: olive trees, citrus fruits, arboriculture, leaf vegetables and vegetables, vines, red meats, milk, and red fruits.

These projects are spread over 11 regions namely: Tangier-Tetouan-Al Hoceïma, L'Oriental, Fez-Meknes, Rabat-Salé-Kénitra, Beni Mellal-Khénifra, Casablanca-Settat, Marrakech-Safi, Souss-Massa, Guelmim Oued Noun, Laâyoune Sakia El Hamra and Dakhla Oued Dahab.

Concerning Agri-business, these are opportunities for the operators concerned in terms of production and commercialization of seeds, seedlings, fertilizers, phyto-sanitary products, agricultural equipment, and drip irrigation equipment.

These opportunities also include the packaging and commercialization of local products and other agricultural products.

For the development of agro-industry, these are investment opportunities in the installation of recovery and transformation units, namely packaging stations, storage units, crushing units and the cold chain.

As such, investors can set up in seven agropoles established in the main production areas in Morocco. These agropoles provide investors with an appropriate framework for the integration of the entire value chain of the agro-industrial sector.

In addition to the land intended for valorization units, these agropoles are equipped with all the infrastructure of the support services of the Ministry of Agriculture and Fisheries, namely: the National Institute for Agricultural Research (INRA), the Autonomous Establishment for Export Control and Coordination (MOROCCO FOODEX), and the National Office for Food Safety (ONSSA).

In addition to these investment opportunities, Morocco offers a favorable business climate on economic, regulatory and institutional aspects.

On the economic level, it is worth mentioning the Agricultural Development Fund that is dedicated to investment in this sector with modular subsidies targeting the different links in the value chains. These subsidies cover agricultural equipment, orchard creation, upgrading units, livestock production, agricultural exports and other types of investment.

Similarly, insurance products specifically designed for agriculture are also available to farmers to cover themselves against climate-related risks, among other things.

In terms of logistics, Morocco is an export hub for agricultural products for investors who can benefit from all the trade agreements signed by Morocco with Europe, the United States, Turkey, Africa and Arab countries...

On the regulatory framework, a favorable legal framework for investment has been put in place. In this respect, it is worth mentioning in particular the law on the interprofessional organizations which regulates the organization of the stakeholders of the production sectors allowing a real synergy between the various stakeholders in the value chain. Mention should also be made of the law on agricultural aggregation, which secures commercial transactions between aggregators and aggregate producers by means of Contracting, within the framework of aggregation projects around valorization units.

At the institutional level, dedicated organizations have been set up to support the entire process from production to export. In this framework, the Agency for Agricultural Development (ADA) is the one-stop shop for investors.







CHARACTERISTICS OF THE AGRICULTURAL SECTOR

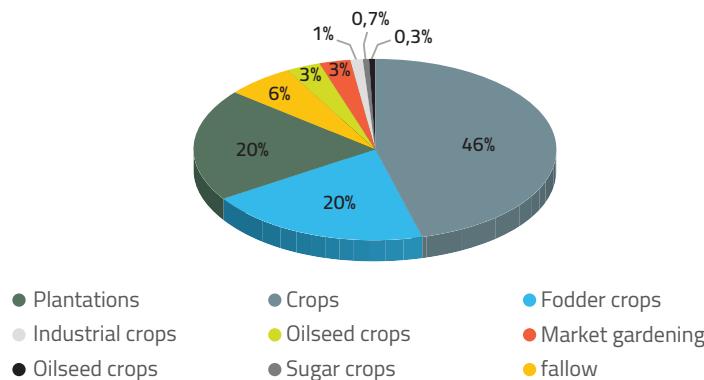
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2.1. NATURAL RESOURCES

Arable AREA (AA)

Of the total area of its territory, Morocco has 67% of land that is suitable for agricultural activity, but only 9 million hectares are being used for agriculture. The AA is distributed throughout the Moroccan territory allowing a continuous and diversified production according to agro-climatic systems.

REPARTITION DE LA SAU



Source: MAPMDREF-DSS-2021

Cereals are major crops both in terms of AA (46%), and in terms of employment and food security, cereals cover about 4.2 million hectares, mainly wheat (durum wheat and common wheat). However, production remains highly variable from one year to the next, depending on the vagaries of the weather, which does not follow national demand, resulting in a cyclical dependence on imports.

The program for the conversion of land to more valuable uses seeks to limit the preponderance of this crop and to diversify the agricultural offer, in particular leaf vegetables and vegetables, which although using only 3% of the AA represents 21% of the overall value of production, or fruit growing on a AA of 20%, while cereals represent 18% of agricultural production for 46% of the AA.

CLIMATE

Morocco is characterized by a very different climate depending on the area. Indeed, it is temperate in the coast while it is desert in the south and east of the country. Thus, the climate is marked by several shades: Mediterranean in the north, oceanic in the west, continental in the interior and Saharan in the south.

Morocco's particular geographical position also gives it a very varied range of bio climates, ranging from humid and sub humid to Saharan and desert, including arid, semi-arid and high mountain climate in the Rif, Middle and High Atlas where altitudes exceed 2,500 m, 3,000 m and 4,000 m respectively. As a result, precipitation, in general, decreases from north to south and is only greater on the mountain ranges where it reaches 2000 mm in the Rif. They are less than 150 mm in the pre-Saharan and Saharan regions. Also, the average annual minimum temperatures vary from 5 ° C to 15 ° C depending on the region with negative absolute minima especially in mountainous regions and those nearby. Maximum temperatures can reach 45 °C in the center of the country and exceed 50 °C in the interior of the Saharan regions.

WATER RESOURCES

Morocco benefits from natural advantages that ensure good water availability: a vast atlasic water tower, perennial rivers such as the Oum Erbia, the Sebou, the Moulouya, the Tensift and important underground aquifers. However, the hydrological contexts of the country are influenced by a very marked annual irregularity and inter annual variability of precipitation and heterogeneity of their spatial distribution.

In addition, the hydraulic potential that can be mobilized is estimated at 22 billion m³, with 18 billion m³ from surface water and 4 billion m³ from groundwater.

To mobilize these resources, Morocco has built 159 large dams, with a total storage capacity of nearly 21.3 billion m³. Dams for agricultural use, the main ones of which are shown in the following table, have a total capacity of 13.17 billion m³.

Dam	Capacity million (m ³)
Sebou Dam Complex	5,321
Mansour Eddahbi	445
Moulay Youssef	149
Hassan Addakhil	313
Mokhtar Soussi	40
Oued El Makhazine	673
Complex on Oued Za	735
Bin El Ouidane	1,233
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 nearly 1,600,000 ha, including 1,300,000 ha of perennial irrigation and 300,000 ha of seasonal irrigation and flood water spreading.

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

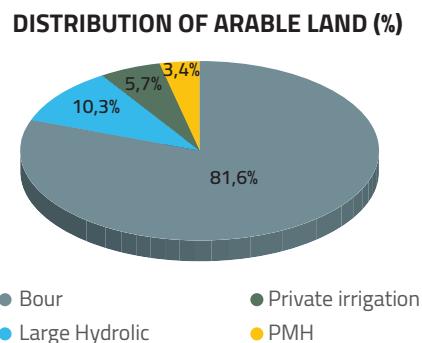
Large hydraulic (GH): with a potential in land irrigable in a sustainable way of the order of 600,000 ha, which concerns nine major agricultural basins: Moulouya, Loukkos, Gharb, Doukkala, Haouz, Tadla, Souss-Massa, Tafilalet and Ouarzazate. In these large basins, irrigation water distributed to farmers comes mainly from large dams. Hydro-agricultural development and irrigation infrastructure management are entrusted to the MVRROs.

Small and medium hydraulics (PMH): it covers an irrigable potential estimated at 300,000 ha of perennial irrigation and 300,000 ha of seasonal irrigation and by spreading floodwater. This is a large number of perimeters spread over almost the entire national territory and whose area can vary from a few tens to a few thousand hectares.

The development of the PMH is often ensured by the State by involving the beneficiaries and associations of users of agricultural water as part of a participatory approach.

Private Individual Irrigation (IP): hydro-agricultural developments are carried out at the initiative of farmers and cover nearly 400,000 ha.

The following graph shows the distribution of arable land:



It should be noted that the irrigated agriculture sector contributes on average to 45% of GDPA and nearly 99% for sugar production, 82% for leaf vegetables and vegetables , 100% for citrus fruits, 75% for fodder and 75% for milk. In addition, it provides nearly 120 million working days per year, or about 1.65 million jobs, including 250,000 permanent jobs.

2.2. AGRICULTURAL PRODUCTION CHAINS

For the implementation of the provisions of the new strategy of the agricultural sector Generation Green and the declination of the axis of the second foundation relating to the further development of the production sectors, new generation program contracts have been drawn up in consultation with the inter-branch organizations concerned, taking into account the strengths and weaknesses of the program contracts concluded during the period of the Green Morocco Plan and the improvement of these CP in terms of approach, content and governance with the implementation of new innovative tools for monitoring the implementation of these program contracts.

These program contracts are declined according to the axes of the two foundations of the Green Generation (2020 - 2030).

The baseline situation as well as the objectives set, the planned areas for upgrading, the investments required, and the main commitments made by the concerned stakeholders in the various agricultural production chains are presented in Annex 1.

LOCAL PRODUCTS AND LABELING

In application of the strategy for the development of local products, the following programs and actions are being implemented:

- **Upstream development through :**

- The upgrading of producer groups and the improvement of production conditions in accordance with health safety and quality standards through, in particular, the construction of new production units and the development of the premises of existing production units for the benefit of groups of small producers and the improvement of equipment and technical materials for valorization;
- The training of the human resources in charge of production for the consolidation of achievements and the improvement of conditions of production, valorization and diversification of products in accordance with the standards of good practices and the regulations in force relating to quality and health safety;
- Strengthening the organization of the production stakeholders ;
- The development of the tourism market for local products through the implementation of integrated development programs and multilateral partnerships;
- Support for market access to the local products producers through packaging support and the organization and contribution to promotional and commercial events.

- **The establishment of equitable aggregation partnerships :**

- Development of the quantitative offer and improvement of the qualitative offer of products;
- Establishment of aggregation partnerships for the solidarity commercialization of products;
- Launch of a specific technical assistance and coaching program for the upgrading of groups of producers.

In addition, the Department of Agriculture has placed itself in a global perspective of rural development, promotion of the specific quality of agricultural products and consumer protection, through the

establishment of the system of Distinctive Signs of Origin and Quality (SDOQ) governed by Law No. 25-06 and its implementing texts as amended and supplemented.

Since the adoption of the Law No. 25-06, 75 SDOQ have been recognized, including 63 PGI Protected Geographical Indications, 6 Protected Designations of Origin (PDO) and 6 Agricultural Labels (LA).

The list of the 80 SDOQ recognized in 2023 as well as the national production potential of local products by region are presented in Appendix 2.

2.3. VALORIZATION OF AGRICULTURAL PRODUCTION

AGROPOLES

As part of the Green Morocco Plan, the State has planned the establishment of 7 agropoles in the main production areas in Morocco, namely Meknes, Oriental, Tadla, Souss, Haouz, Gharb and Loukkos. The objective of these structuring projects is to strengthen the competitiveness of companies in the agri-food sector and to increase investment in the sector, with a view to providing an appropriate framework for the integration of the entire value chain of the agro-industrial sector and increasing its productivity.

These Public-Private Partnership projects present a complete value offer integrating an agro-industrial park to host transformation and support activities, logistics and service platforms, and make available to investors plots of land to carry out their projects.

In addition, the Ministry of Agriculture, Fisheries, Rural Development and Water and Forests plans to set up a Quali pole Food within each agropole to support stakeholders in efforts to improve productivity and competitiveness. This Quali pole consists of laboratories of Morocco Foodex, ONSSA, INRA, ONCA as well as common areas (reception center, conference room, accommodation area and Restaurant).

Concept of the agropole:

The agropole consist of Agro parc and Quali pole Alimentation as follows:

- Agro-industrial activity zone: Agro-food transformation companies, support companies, etc.;
- Logistics and service area: Packaging and refrigeration stations, logistics services (TIR park, ...), service station...;

- Zone of commercial activities and distribution: Platform of local products, mass distribution, sale of agricultural equipment...;
- Visitor center: agropole management company, business and personal services (banks, customs, restaurant, hotel ...);
- Quali pole Diet.

AGROPOLES LOCATIONS



Characteristics and progress of each agropole:

The development work of the agropole of Meknes, Berkane, Tadla and Souss has been completed and these projects are currently in the commercialization phase of the lots to investors.

For the other three agropoles (Loukkos, Gharb and Haouz), preparations are underway and the construction works started by the end of 2022 for the Loukkos agropole and in 2023 for those of Gharb and Haouz.

PROJECT 1: AGROPOLIS OF MEKNES

- **Presentation of the project :**

- Region: Fez-Meknes;
- Location: Commune SIDI SLIMANE MOUL ALKIFAN, 4 km from the Meknes East interchange;
- Area of the 1st tranche: 136.2 ha.

- **Commercialization of the project :**

- Number of lots available: 212 lots, corresponding to a net area of 108 ha;
- Number of lots marketed: 123 lots, for a net area of 67.6 ha;
- Number of projects contracted: 101 projects;
- Price of lots: 330 to 425 Dh / m², depending on the size of the lots.

PROJECT 2: AGRO-POLR DE BERKANE

- **Presentation of the project :**

- Region: Eastern;
- Location: Rural Commune of Madagh, Berkane Province, 12 km north of the city of Berkane;
- Area of the project: 102 ha, including 50 ha for the 1st tranche.

- **Commercialization of the project :**

- Number of lots in the 1st tranche: 63 lots, corresponding to a net area of 31.4 ha;
- Number of lots marketed: 55 lots for a net area of 25 ha;
- Number of projects contracted: 41 projects;
- Price of the lots: 400 to 450 DH / m², depending on the size of the lots.

PROJECT 3: AGROPOLE OF TADLA

- **Presentation of the project :**

- Region: Tadla Azilal;
- Location: Rural commune Ouled M'Barek, 8 km from the city of Beni Mellal;

- Total area of the project: 208 ha, including 105 ha for the 1st tranche.

- **Commercialization of the project :**

- Number of lots in the 1st tranche: 358 lots, for a net area of 80 ha;
- Number of lots marketed: 69 lots, for a net area of 19.1 ha;
- Number of projects contracted: 61 projects;
- Price of the lots: 500 to 600 Dh / m², depending on the size of the lots.

PROJECT 4: AGROPOLE OF SOUSS

- **Presentation of the project :**

- Region: Souss-Massa;
- Location : Drargua commune, Agadir Ida Outanane préfecture;
- Project area: 73.6 ha in three tranches (30.9 ha for T1, 11.7 ha for T2 and 20.7 ha for T3).

- **Commercialization of the project :**

- Total number of lots available: 204 lots, corresponding to a net area of 54.5 ha;
- Number of lots marketed: 121 lots, for a net area of 31.2 h Number of projects contracted: 91 projects (Tranches 1 and 2);
- Price of lots: 500 Dh / m² to 560 Dh / m² depending on the size of the lots.

PROJECT 5: AGROPOLE OF LOUKKOS

- **Presentation of the project :**

- Region: Tangier Tetouan-Al Hoceima;
- Location: Commune of Zouada, Province of Larache;
- Area of the project: 150 ha, including 50 ha for the 1st tranche and 50 ha as land reserve.







INVESTMENT ENVIRONMENT

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3.1. DEVELOPMENT OF AGGREGATION

Agricultural aggregation, which represents an innovation introduced by the Green Morocco Plan, is considered the keystone of national agriculture. It consists of a model of organization of farmers around private stakeholders or professional organizations with managerial capacities that makes it possible to overcome the constraints related to the fragmentation of land structures while ensuring that aggregated farms have the opportunity to benefit from modern production techniques and access domestic and external markets. For their part, aggregators ensure the supply of their agro-industrial units with quality products and with guaranteed traceability as part of a win-win partnership between the productive upstream and the commercial and industrial downstream on the basis of contracts clearly defining the commitments of both parties in the context of well-identified agricultural aggregation projects.

Successful experiences at the national and international levels indicate the relevance of this strategic choice. Thus, since the launch of the Green Morocco Plan, the State has ensured to create the legal, incentive and institutional conditions for the development of agricultural aggregation projects while ensuring continuous improvement of these conditions by capitalizing on the experiences lived on the ground.

Today, and as part of the new "Green Generation" strategy, agricultural aggregation is even more strengthened in order to face the new challenges related to the commercialization and valorization of agricultural production and which cannot be met without integration between the different links in the value chain.

Indeed, the new "Green Generation" strategy provides for the launch of a new generation of agricultural organizations through the spread of new organizational models, agricultural cooperatives and aggregation combining economic and social value offering.

As such, the State plans to launch a new generation of innovative aggregation projects that will play the role of regional and national hubs for the transfer of new technologies to farmers, particularly in digital agriculture and that take into account, before and during their implementation, the specificities of each sector and each territory.

THE NEXT GENERATION AGGREGATION PROJECTS ARE:

- Projects that take into account, before and during their implementation, the specificities of each sector and each territory;
- Projects where the focus will be on the integration of youth and women at upstream and downstream levels;
- Aggregation champions who will be a locomotive for development and organization at local and regional levels;
- Innovative projects that will play the role of regional and national hubs for the transfer of new technologies, including the digitalization of Moroccan agriculture;
- Projects that attract significant downstream investments that generate sustainable jobs.

Objectives of the Agricultural aggregation:

The law No. 04-12 on agricultural aggregation defines agricultural aggregation as a voluntary grouping of farmers aggregated around an aggregator for the realization of an agricultural project, with a view to achieving one or more of the following objectives:

- The organization of agricultural production through the technical supervision of farmers, the pooling of means of production and access to inputs;
- Facilitating access to finance and/or insurance schemes;
- Facilitating and optimizing the sale of agricultural products;
- Improving the commercialization conditions for agricultural products.

Reasons for choosing agricultural aggregation:

The choice of agricultural aggregation as the preferred mode of organization of farmers for the implementation of new generation aggregation projects is dictated by the following five reasons:

1. Agricultural aggregation is an attractive and competitive solution for extending the upstream perimeter in the face of a limited supply of land in rural areas.

2. This mode also makes it possible to optimize the link between the market, the productive upstream and the entire value chain through:
 - The aggregator's skills in terms of market knowledge and ability to adapt the production offer according to potential outlets (e.g. appropriate varietal choice, adapted packaging);
 - The cost-competitive logistical link between production and the destination market, thus avoiding the use of a multitude of intermediaries and excessive erosion of margins.
3. This mode contributes to the generalization of good techniques through the management teams mobilized by the aggregator, on the one hand, and the own production units (Nucleus Farm) managed by the aggregator and constituting demonstration platforms, on the other hand.
4. Agricultural aggregation can be a solution for access to finance for smallholders through the possibilities of direct financing of farmers by banks on the basis of agricultural aggregation contracts and/or advances and inputs granted by the aggregator to aggregated farmers.
5. It allows for a natural sharing of risks between the aggregator and the aggregated farmers because the risk of production is mainly borne by the aggregated farmers, while the risk of commercialization is mainly borne by the aggregator. The use of appropriate insurance makes it possible to curb these risks for both parties.

Benefits of agricultural aggregation:

On monetary level

For the aggregate

- Income improvement and stability;
- Access to more efficient inputs;
- Reduced input costs;
- Control of working capital requirements;
- Limitation of credit risks;
- Access to more appropriate means of financing;
- Access to state subsidies specific to aggregation.

For the aggregator

- Reduced investment costs;
- Reduced personnel costs;
- Reduced transaction costs;
- Optimization of means and production capacities;
- Economies of scale;
- Access to state subsidies specific to aggregation.

On the non-monetary level

For the aggregate

- Valorization and improvement of the quality of production;
- Improved market access in a reliable and stable manner;
- Reduced market risk;
- Improved market access in a reliable and stable manner;
- Access to farm advisory services and new technologies;
- Reduction of barriers for the production of crops at risk;
- Opportunity to reconvert to more rewarding sectors;
- commercialization of production under contracts guaranteed by the Agricultural Aggregation Act.

The aggregator

- Access to a broad land base without raising capital;
- Development of commercial capacities to conquer new markets;
- Regularity and sustainability of sourcing quality products;
- Risk diversification;
- Better match between production and market needs;
- Commercialization of production under contracts guaranteed by the Agricultural Aggregation Act.

STATE SUPPORT MEASURES FOR AGGREGATION PROJECTS

At the legal framework

In order to create an institutional, legal and incentive environment favorable to the development of aggregation projects, the State has put in place an arsenal of measures relating in particular to the establishment of specific support for aggregation projects and the establishment of an appropriate legal framework, namely:

- Law No. 04-12 on agricultural aggregation, promulgated by Dahir No. 1-12-15 of 27 Chaabane 1433 (17 July 2012);
- Decree No. 2-12-490 of 19 Moharram 1434 (4 December 2012) adopted for the application of law n°04-12 on agricultural aggregation;
- Joint Order of the Minister of Agriculture, Fisheries, Rural Development and Water and Forests, the Minister of the Interior and the Minister of Economy, Finance and Administration Reform No. 2410-19 of 29 Safar 1441 (28 October 2019) setting the forms and procedures for approving agricultural aggregation projects and issuing agricultural aggregation certificates;
- Joint Order of the Minister of Agriculture, Fisheries, Rural Development and Water and Forests, the Minister of the Interior and the Minister of Economy, Finance and Administration Reform No. 2411-19 of 29 safar 1441 (28 October 2019) setting the amounts, rates, ceilings and modalities of granting subsidies granted to agricultural aggregation projects.

At the institutional level

The Agency for Agricultural Development, in coordination with the relevant Regional and Central Directorates of the Department of Agriculture, ensures the development of aggregation by setting up framework conditions and supporting the implementation and monitoring of aggregation projects.

At the incentive level

Aggregation projects carried out around a valorization unit, benefit within the framework of the Agricultural Development Fund from:

- Flat-rate agricultural aggregation incentive subsidy for the aggregator's assistance and technical support for the benefit of aggregated farmers with a view to achieving the objectives set in the agricultural aggregation project concerned.

It shall be paid in three installments on the basis of the lists of aggregated farmers provided annually by the aggregator and approved or revised during the first three years of delivery of the production of the agricultural aggregation project concerned.

- Preferential rate subsidy which is granted to the aggregators and also to the aggregator for the areas/number of livestock/number of hives it operates and to the aggregated farmers, for investments made in the acquisition of agricultural equipment and/or livestock equipment and/or equipment in drip irrigation systems or complementary irrigation.

This subsidy concerns all agricultural sectors, including those that do not have a predefined aggregation model provided that the project is built around a valorization unit.

Models of agricultural aggregation projects:

Aggregation projects are undertaken around valorization units, namely:

- **Citrus fruit:** unit of conditioning and/or transformation;
- **Olivier:** unit of crushing and / or canned olives;
- **Fruit growing :** cold storage and/or packaging and/or transformation unit;
- **Vine:** unit of conditioning and/or transformation;
- **Date palm:** unit for conditioning and/or cold storage and/or transformation;
- **Vegetable crops:** cold storage and/or freezing and/or packaging and/or transformation unit;
- **Berries:** a unit of packaging and/or deep-freezing and/or transformation;
- **Autumn cereals (durum wheat, common wheat, barley):** grain storage and/or transformation unit;
- **Irrigated spring cereals (rice, maize):** grain storage and/or transformation unit;
- **Legumes:** storage and/or packaging and/or transformation unit;
- **Oil crops:** crushing unit;

- **Sugar crops:** transformation unit;
- **Certified cereal seed:** unit packet;
- **Certified seed of potatoes:** refrigeration and/or packaging unit;
- **Certified seed of legumes:** unit packet;
- **Certified seed of oilseed crops:** unit packet;
- **Organic citrus fruits:** unit of conditioning and/or transformation;
- **Organic olive:** unit of crushing and / or canned olives;
- **Organic vegetable crops:** refrigeration and/or packaging and/or deep-freezing and/or transformation unit;
- **Argan tree:** crushing and/or extraction and/or transformation unit;
- **Saffron:** unit of conditioning and/or transformation;
- **Perfume rose :** unit of conditioning and/or transformation;
- **Sesame:** unit of conditioning and/or transformation;
- **Locust beans:** unit of conditioning and/or transformation;
- **Cumin:** unit of conditioning and/or transformation;
- **Cultivated aromatic and medicinal plants:** unit of packaging and/or transformation;
- **Cactus:** unit of conditioning and/or transformation;
- **Red beef and/or veal and/or sheep and/or goat meat:** fattening unit and/or slaughterhouse;
- **Camelina red meat:** fattening unit and/or slaughterhouse;
- **Cow's milk:** dairy transformation unit;
- **Goat milk:** dairy transformation unit;
- **Camel milk:** dairy transformation unit;
- **Poultry meat:** poultry slaughterhouse;
- **Eggs for consumption:** unit of packaging or transformation;
- **Beekeeping:** honey extraction and packaging unit.

Process of setting up and implementing an agricultural aggregation project:

The implementation of an agricultural aggregation project involves the following main phases:

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

a. Constitution and submission of the application file for approval of the agricultural aggregation project:

Before the implementation of the project, the aggregator prepares and submits to the Regional Directorate of Agriculture of domicile of the project, the file of the application for approval of its agricultural aggregation project. This file consists of the following 4 documents:

- The documents relating to the identification of the aggregator:-
 - For natural persons: copy of the national identity card (CNI);
 - For legal entities: copy of the articles of association as well as a copy of the CNI of their legal representative.
- A sheet relating to the aggregation project specifying:
 - The sector concerned by the project;
 - The region(s) concerned by the project;
 - The identification details of the agricultural holdings belonging to the aggregator concerned by the project, in particular their location, areas, livestock numbers or number of hives, as appropriate;
 - The objectives of the project, in particular the number of farmers to be aggregated, the area, the number of livestock or the number of hives to be aggregated, as appropriate, and the expected yield or productivity;

- The technical and management capabilities of the aggregator;
- The estimated investment of the project, and if applicable, its schedule;
- The description of the aggregator's role with the aggregated farmers, particularly in terms of assistance, technical supervision and commercialization of production;
- The technical, economic and logistical opportunity of the project.

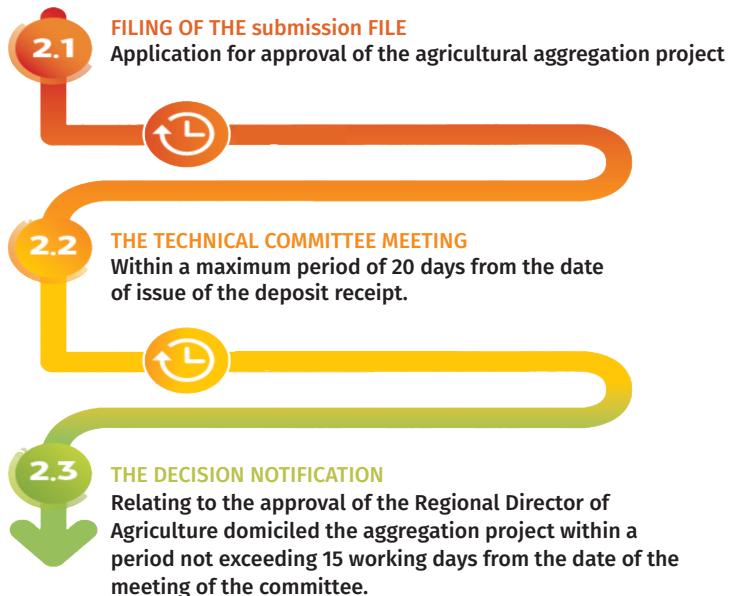
- The location of the recovery unit concerned as well as its type, nature, and capacity.
- The list of aggregated farmers associated with the agricultural aggregation project with the particulars of their identity, the province and the commune hosting their holdings subject to the agricultural aggregation project;
- The draft agricultural aggregation contract to be concluded between the aggregator and the aggregated farmers. This draft contract must meet the conditions laid down in Articles 9 and 10 of Law No. 04-12.

b. Examination of the file of the agricultural aggregation project by the Technical Committee

A Technical Committee chaired by the Director of the DRA housing the valorization unit subject to the agricultural aggregation project or his representative, examines the agricultural aggregation project and gives its opinion on the approval of the project.

The Technical Committee meets within a maximum period of 20 days, from the date of issue of receipt for submission of the application file for approval of the agricultural aggregation project.

The decision on the approval of the agricultural aggregation project, taken by the Technical Committee, shall be notified to the applicant by the Regional Director of Agriculture, within a period not exceeding 15 working days from the date of the meeting of the committee having examined his request for approval of the agricultural aggregation project.



c. Submission of the final file for the agricultural aggregation project

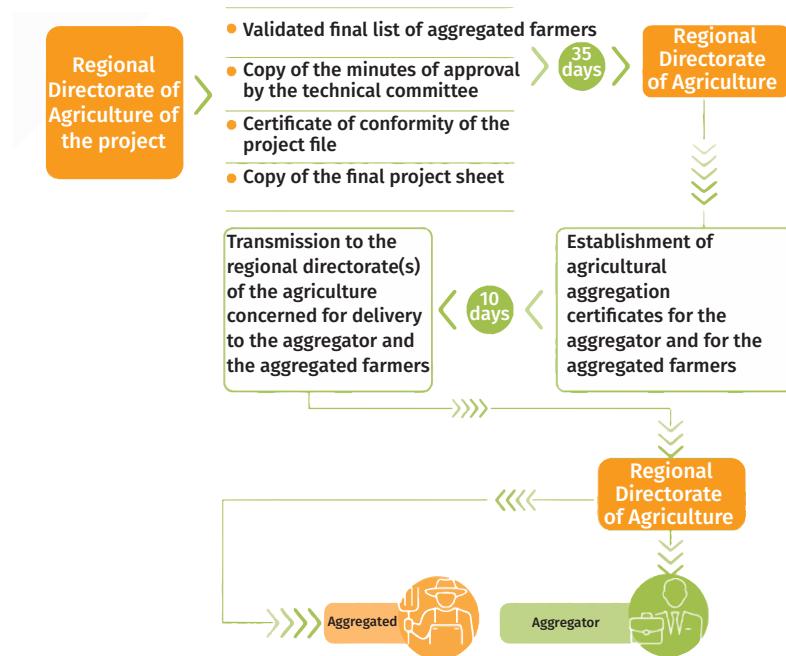
The aggregator is required to complete its file within a maximum of three (3) months from the date of receipt of the project approval decision by the following:

- The final list of aggregated farmers, signed by the aggregator, with an indication of their identity, the province and the municipality hosting the agricultural holding, indicating the area, the number of livestock or the number of hives, as the case may be, as well as a numerical version of the said list;
- CNI of the aggregate for natural persons and the copy of the articles of association for legal persons as well as the copy of the CNI of their legal representative. Aggregation contracts must be signed and legalized for natural persons and signed and sealed for legal persons. These contracts must have a duration that may not be less than five (5) years;
- The final sheet relating to the aggregation project, provided for in the first phase of the assembly process as indicated above, as approved by the technical committee, signed by the aggregator and validated by the chairman of the said committee.

d. Allocation phase of agricultural aggregation certificates

Once the final file of the agricultural aggregation project is received with the certificate of conformity of the final file of the agricultural aggregation project established by the DRA, the ADA assigns a national identifier to this project which will be associated with it throughout the duration of its implementation and registers the said project in a National Register.

The ADA establishes the agricultural aggregation certificates for the aggregator and for the aggregated farmers. These certificates are transmitted to the Regional Directorate(s) of Agriculture concerned, for their delivery to the aggregator and the aggregated farmers.



3.2. STATE FINANCIAL AID

In order to support the implementation of the agricultural policy, the State grants financial aid to the agricultural sector to stimulate private investment. Implemented through the Fund for Agricultural Development (FDA), these are periodically reviewed to meet the strategic objectives of the policy.

The revision of aid proposes, firstly, the introduction of new aid in accordance with the commitments made in the framework of the program contracts signed between the State and the inter-branch association of the main production sectors, as well as the strengthening of the aid allocated to certain headings, but also an encouragement and a strong incentive for aggregation.

In addition, in order to facilitate the process of granting its aid, accompanying measures have been put in place, such as formalized and fully adapted procedures, Single Desk (GU), with antennas if necessary, with DPAs and ORMVA with an E-deposit service provided through the platform "Electronic Single Desk (GUE)" accessible via the following link: fda.agriculture.gov.ma/gue, in addition, a specific application, entitled System of Agricultural Aids and Subsidies 'SABA'. The latter, accessible from the MAPMDREF web portal, under the heading 'online services', offers a multitude of advantages:

- Speed and simplification of the transformation of files;
- Collaborative work and real-time information sharing between the different levels of the territory;
- An improvement in the quality of services offered to users;
- Traceability of operations;
- Instant follow-up of files;
- Control of public funds.

UNIVERSAL SUBSIDY SCHEME:

Depending on the field of intervention, this scheme has the following objectives and objectives:

Hydro-agricultural developments and farmland improvements:

- Promotion of water saving through the adoption of water-efficient irrigation techniques;
- Improved productivity and water valorization;
- Promotion of access to drip irrigation techniques for smallholder farmers..

Support for plant trees:

- Achieve the objectives of the "Green Generation" strategy;
- Improve the rate of agricultural mechanization;

- Improve production techniques and increase the productivity of all agricultural sectors;
- Improve access of small farmers to state financial support;
- Extension of fruit growing (olive trees, rosacea...);
- Increase the production of fresh and processed fruits and vegetables;
- Improve the performance of valuation units;
- Improve the quality of agricultural products (organic certification of products);
- Modernization of the agro-industrial fabric;
- Promotion of exports of agricultural and local products;
- Improve the trade balance of agricultural products by strengthening Morocco's position on historical markets and conquer new markets.

Support for animal sectors:

- Improve the performance of milk and meat breeds;
- Modernize dairy, red meat and poultry farms;
- Improve the productivity of livestock (milk, meat, honey, etc.);
- Develop the downstream of the milk and red meat sectors;
- Valuing products of animal origin;
- Promote exports of animal products;
- Ensure self-sufficiency in animal products (dairy products and meat).

Thus, to benefit from FDA aid, farmers and investors in the private sector are required to file, before making their investments, the subsidy application files according to the nature of the investment subject to applications, with the one-stop shop of the Provincial Directorate of Agriculture (DPA) or the Regional Office for Agricultural Development (ORMVA), in the jurisdiction of which the land is located, investment support.

Depending on the nature of the investment, grant applications can be processed according to two procedures.

- Two-stage procedure: this procedure concerns projects relating to aid headings which require the actual implementation of investments on the ground. The transformation of files for this type of project goes through two phases:
 - Prior approval phase during which the applicant must submit an application for approval of his project before the investment is carried out. This phase generally consists of studying the eligibility of the investments proposed for the grant.
 - Grant application phase that follows the completion of the investment following the obtaining of the certificate of prior approval on the project. The departments concerned carry out on-site checks on the site of the actual implementation and according to the required standards of the corresponding investments on the basis of a grant application file to be submitted by the applicant. On the basis of a complete grant application file and the compliant achievements of the investments, the CAM (Crédit Agricole du Maroc) is notified for the release of the corresponding grant amount on the applicant's account.
- Single-stage procedure: This procedure covers files relating to investment headings that can be subsidized without recourse to a prior approval phase.

Examples of subsidies for agricultural investments are illustrated in Annex 3.

SYSTEM OF SPECIFIC AID FOR AGGREGATION PROJECTS:

State financial aid is granted to agricultural aggregation projects in the form of:

- Subsidy at preferential rates for investments made in the acquisition of agricultural equipment and livestock equipment and/or equipment of farms with drip irrigation systems or supplements;
- Flat-rate agricultural aggregation incentive subsidy for the aggregator's assistance and technical support for the benefit of aggregated farmers with a view to achieving the objectives set out in the agricultural aggregation project concerned.

Preferential Rate Subsidy:

The subsidy at preferential rates related to irrigation and equipment in agricultural and livestock equipment is granted to farmers (aggregators or aggregated farmers), on the basis of a single file filed with the competent services of the Regional Directorate of Agriculture of the place of the holding concerned. This grant is paid in two installments:

- The first tranche: calculated on the basis of the rates and ceilings set under the universal scheme. This tranche is paid as soon as the certificate of agricultural aggregation is obtained and after completion of the investment to be subsidized;
- The second tranche: calculated on the basis of the rates and ceilings linked to agricultural aggregation projects, less the amount granted in the first tranche on the basis of the same grant application file.

Flat-rate agricultural aggregation incentive subsidy:

As regards the flat-rate subsidy, it is paid in three installments on the basis of the lists of aggregated farmers provided annually by the aggregator and approved by the competent services, during the first three years of delivery of the production of the agricultural aggregation project concerned, as follows:

- 1st tranche: 1/3, at the end of the 1st year of delivery of the production by the aggregated farmers;
- 2nd tranche: 1/3, at the end of the 2nd year of delivery of the production by the aggregated farmers;
- 3rd tranche: 1/3, at the end of the 3rd year of delivery of the production by the aggregated farmers.

To this end, during the first three years of implementation of the project, the aggregator submits an annual application for a flat-rate aggregation incentive subsidy relating to the aggregated areas or numbers of livestock.

The release of the lump sum subsidy is made at the end of each of the schedules provided for on the basis of a report established by the competent services of the Regional Directorate of Agriculture concerning the following:

- The average performance observed with a representative sample of aggregated farmers;
- A report on the register kept by the aggregator specifying in particular the aggregated farmers who delivered their production for the previous commercialization year, the total quantity delivered by the aggregated farmers, the area/number of the stock of the aggregated farmers who delivered their production.

BANK FINANCING

For the financing of investment projects in the agricultural sector, the Moroccan Government, under the high royal instructions, has launched the INTELAKA integrated financing program. The INTILAKA program is a financing, support, advice and guidance program that targets early stage companies willing to establish their project or accelerate their development.

This financing plan is a loan to finance operating and capital expenditures. It targets the following classes:

- Individual Farmers and Farmers;
- Very small businesses and individual entrepreneurs in the rural world;
- Cooperatives;
- Micro-enterprises including craftsmen;
- Independent entrepreneurs who do not have the status of auto-entrepreneur (informal);
- Small enterprises exporting to Africa;
- Emerging companies;
- Young graduates/qualified project leaders;
- Self-employed project leaders;
- Individual Entrepreneurs and VSEs in the rural world;
- Start-ups.

To qualify for **INTELAKA** funding, certain conditions are required. Namely:

- For companies in the process of being created: they must have a projected turnover equal to or less than 10 million dirhams.
- For existing companies operating in urban areas: they must have a turnover equal to or less than 10 million dirhams, they must be less than five years old.
- For companies operating in rural areas: they must have a turnover equal to or less than 10 million dirhams, they must be less than five years old.

* Agricultural companies which may be either new creations, or significant conversions of the holding, or innovative investments or allowing a modernization of the activity are Exempt from these conditions.

The products are broken down according to the type of need to be financed and according to the location of the projects:

- Need to finance an investment;
- Need to finance operating expenses;
- Need to finance start-up working capital;
- Location in urban areas according to the reference system of the Ministry of the Interior;
- Location in rural areas.

CROP INSURANCE

Climate multi-hazard for cereal, pulse and oilseed crops:

The insurance contract, developed by Moroccan Agricultural Mutuelle of Insurance (MAMDA), is open to farmers whose production covers cereal crops, soft wheat, durum wheat, barley and maize, pulse crops, beans, lentils, peas, chickpeas and beans and oilseed rapeseed and sunflower crops. This insurance covers the following risks: drought, hail, frost, high winds, sand winds and excess water.

The multi-risk climate insurance product extends to all rural municipalities in the Kingdom.

Farmers will be able to subscribe to the following levels of guarantee depending on the area where the insured parcel is located, the area and the type of insured harvest:

Zone	Guarantee level	Eligible area	Types of crops Grain/Legume
Zone 1: unfavorable in Bour	600 MAD/ha	All areas	Cereals and legumes
Zone 2: moderately unfavorable in Bour	900 MAD/ha	All areas	Cereals and legumes
Zone 3: favorable in Bour and irrigated area	Level 1: 1.450 MAD/ha	All areas	All types of insurable crops
	Level 2: 2.900 MAD/ha	Area greater than or equal to 10 ha	All types of insurable crops
	Level 3: 4.350 MAD/ha	Area greater than or equal to 20 ha	Common wheat, durum wheat, maize, rapeseed and sunflower
	Additional level Level 4: 6.000 MAD/ha	Area greater than or equal to 100 ha	Common wheat, durum wheat, maize, rapeseed and sunflower
	Additional level Level 5: 8.000 MAD/ha	Area greater than or equal to 100 ha	Common wheat, durum wheat, maize, rapeseed and sunflower

For rural communes in zones 1 and 2, a **guaranteed minimum compensation amount** of 300 Dh/Ha has been introduced in the event of a disaster to cover part of the cost of inputs and reduce the vulnerability of small farmers in difficult climatic conditions.

It should be noted that irrigated plots and oilseed crops are insurable at levels 1, 2.3 and additional levels regardless of the areas where they are located.

Irrigated plots are not covered against the risk of drought.

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

The subscription period runs from 1 September each year to 15 December for autumn crops (common wheat, durum wheat, barley, broad beans, lentils, peas and rapeseed) and 28 February for spring crops (maize, beans, chickpeas and sunflower).

The guarantee period shall begin at sowing and at the earliest on the dates fixed by type of harvest and by zone and shall end at harvest.

To this end, the State subsidizes part of the amount of contributions due by insured persons, determined according to the level of guarantee, of 57%, 68% and 90%.

The amount of contributions payable by farmers is thus, depending on the level of guarantee subscribed, as shown in the following table:

Warranty Levels	Contribution subsidy rate	Contribution paid by farmers
Unfavorable areas in Bour: 600 DH/ha	90%	16 DH/Ha
Moderately favorable areas in Bour: 900DH/ha	90%	22 DH/Ha
Favorable areas in Bour and irrigated areas:		
- Level 1: 1.450 DH/ha	90%	26 DH/Ha
- Level 2: 2.900 DH/ha	68%	199 DH/Ha
- Level 3: 4.350 DH/ha	57,3%	398 DH/Ha

The State's contribution is paid from the FDA's own resources via the Natural Disaster Fund, into the account of the MAMDA.

Multi-risk climate guarantee program fruit growing:

- Insurable productions: Pome Rosaceae (apple, pear and quince), Stone Rosaceae (apricot, plum, peach, nectarine and cherry), Citrus, Olive, Almond, Pomegranate and Fig;
- Risks covered: Hail, Frost, Strong wind, Cheergui, High temperatures, Excess water;

- Territorial coverage: The guarantee program extends to the main fruit growing areas;
- Conditions of membership: The guarantee contract "Multi-risk Climate Fruit Arboriculture" is marketed by the MAMDA, is open to any farmer whose crop nature to be guaranteed is part of the list of eligible crops covered;
- The guaranteed parcel must be located in one of the provinces covered by the Guarantee Program;
- Subscription period:

Type of harvest	Subscription period
Apple tree	January 1 to June 15
Pear tree	January 1 to May 31
Quince	January 1 to May 31
Apricot	January 1 to April 30
Plum	January 1 to April 30
Peach and Nectarinier	January 1 to April 30
Cherry tree	January 1 to May 31
Citrus fruits	January 1 to June 15
Olive tree	January 1 to June 30
Almond	January 1 to May 31
Pomegranate tree	January 1 to May 31
Fig tree	January 1 to May 31

Guaranteed capital (Dh) = Guaranteed capital per Ha (Dh/Ha) x Guaranteed area (Ha)

The guaranteed capital corresponds to the amount of production costs incurred by the farmer, however, this capital may not exceed the ceiling set below by type of harvest.

Crops	Guaranteed capital limit in Dh/ha
Apple and pear trees	34 500
Quince	19 500
Rosaceae (apricot, plum, peach, nectarine and cherry)	13 700
Citrus fruits: Small fruits	35 000
Citrus fruits: Oranges	28 700
Olivier Bour	3 400
Olivier Irrigated (density <285 plants/ha)	7 600
Olivier Irrigated (density >= 285 plants/ha)	11 500
Almond tree Bour	5 700
Irrigated almond tree (density < 330 plants/ha)	8 600
Irrigated almond tree (density >= 330 plants/ha)	15 000
Pomegranate tree	15 600
Bour fig tree	2 100
Irrigated fig tree	5 700

Contribution amount: **Contribution (Dh) = Guaranteed capital (Dh) x Subsidized contribution rate (%)**

Crops	Contribution rate range	
	Min.	Max.
Citrus fruits	3.6%	7.5%
Rosaceae	2.7%	7.5%
Almond	2.7%	7.5%

Crops	Contribution rate range	
	Min.	Max.
Olive tree	2.7%	7.5%
Pomegranate tree	2.7%	7.5%
Fig tree	2.7%	7.5%

- State subsidy to contributions: Modulated according to the guaranteed area:
- Subsidized contribution rate - **Varies depending on the province where the operation is located:**

Area	State subsidy (% of contribution amount)
≤20 ha	70%
20 ha < Super.≤ 50 ha	60%
Greater than 50 ha	50%

A 15% discount **on the contribution rate** will be granted to areas equipped with an anti-hail net and / or frost fighting wind machine (called "Wind machine").

Other insurance products:

Fire insurance

- Fire straw and fodder

It guarantees reimbursement for damage caused by fire to straw and fodder, whether contained in a building or made of grinding wheels. It also covers fire damage to neighbors and third parties.

- Fire vehicle and agricultural equipment

This insurance covers all damage caused by fire to: Agricultural tractors, combines; Sugar cane harvesting machines and any self-propelled machinery used for agricultural work. It also covers any damage caused to third parties' crops.

- Crop fire insurance

It guarantees damage caused by fire to the crops of standing crops or millstones.

Hail insurance

It covers the farmer's production against quantitative and qualitative losses caused by the mechanical action of hailstone shock to standing crops.

Hail insurance insures the total value of crops (fruit or grain), the contribution of which is calculated according to a rate expressed in % which is based on the class of crops as well as the municipality in which the holding is located.

Livestock mortality insurance

The purpose of livestock mortality insurance is to protect the farmer against unforeseen events that may cause the death of his livestock. It compensates him in the event of death of bovine animals or horses following the following events: Accident, Breeding, Gestation, Farrowing, Electrocution and drowning, Slaughter authorized either by MAMDA or by the health authorities, Slaughter by decision of a veterinarian, Death in case of emergency operation to keep the animal, Death of the insured animal during transport (less than 50 km from the place of breeding)...

Agro-industrial multi-risk insurance

This multi-risk offers a complete formula of guarantees designed for professionals in agro-industrial and refrigeration units (flour mills, oil mills, storage depots.) to protect themselves against the risks of fire, theft, water damage and civil liability.

Liability insurance

This product guarantees the insured effective protection against the pecuniary consequences of the civil liability that he may incur, due to physical, material and immaterial damage caused to third parties by an accident resulting from:

- Its farm staff or other persons in its custody;
- Its buildings, animals, equipment, and facilities.

Individual farmer accident insurance

Its purpose is to guarantee the payment of compensation to insured persons in the event of accidental death, bodily injury, disability or disability resulting from accidents during their professional or private lives.

3.3. PUBLIC-PRIVATE PARTNERSHIP PROGRAMS

PUBLIC-PRIVATE PARTNERSHIP AROUND STATE OWNED FARMLANDS

Scope of the operation:

The public-private partnership operation around agricultural land (State owned farmlands and habous land) aims to mobilize national and foreign private capital for the realization of agricultural projects allowing an optimal valuation of this land while contributing to the creation of employment in rural areas.

As part of this operation, the Moroccan State makes available to investors, through a long-term contract, agricultural farms with reasonable leasing rates. For its part, the partner undertakes to implement the project subject to its offer and to take in charge all the workers associated with the farmland.

Implementation modalities:

The partnership operation is implemented through calls for tenders launched periodically by the ADA, as and when a suitable state-owned farmland is available.

May participate in the Call for Tenders, any natural or legal person, Moroccan or foreign, presenting satisfactory references in technical and financial matters in the agricultural field and / or in sectors related to agricultural sectors (agricultural inputs, production, commercialization, transformation, distribution, etc.) and / or in activities related to rural development. References in other sectors are also taken into consideration provided that the bidder surrounds itself with agricultural expertise.

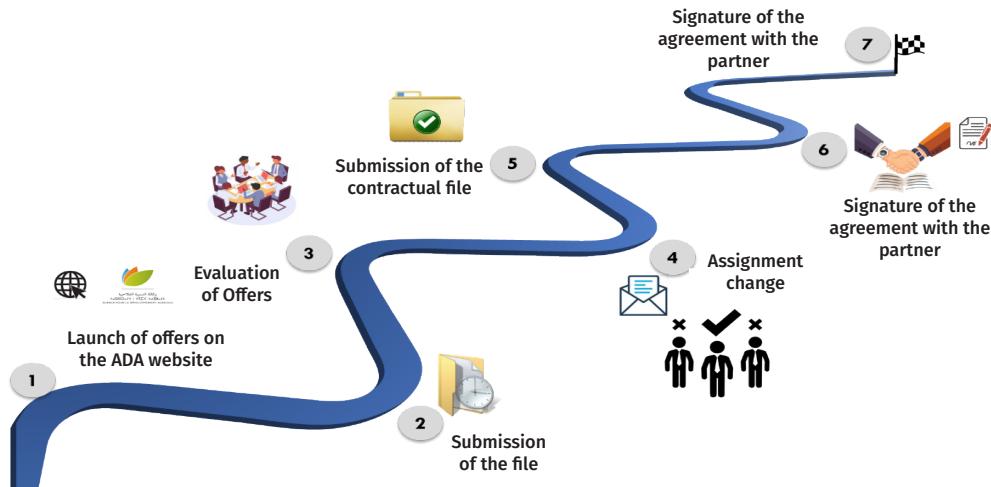
Before signing the partnership agreement, the successful bidder must satisfy the following main conditions:

- The constitution of a Moroccan company under private law whose successful bidder must hold at least 34% of the shares in the capital of the company signatory to the partnership agreement;

- The production of a topographic plan of the land composing the allocated project, carried out by an approved topographic firm and validated by the Directorate of State Domains;
- The constitution of a bank guarantee intended to secure the payment of the equivalent of an annual leasing rate;
- The constitution of a bank guarantee to secure the investments planned at the level of the land object of the project, equivalent to:
 - 5% of the total amount of investment projected in the offer, for medium and large-scale projects (area greater than 20 ha);
 - 2.5% of the total amount of investment projected in the offer, for small projects (area less than or equal to 20 ha).
- The payment receipt by the partner of the amount of the first annual leasing rate;
- An authorization to directly debit the leasing rate along with a RIB certificate.

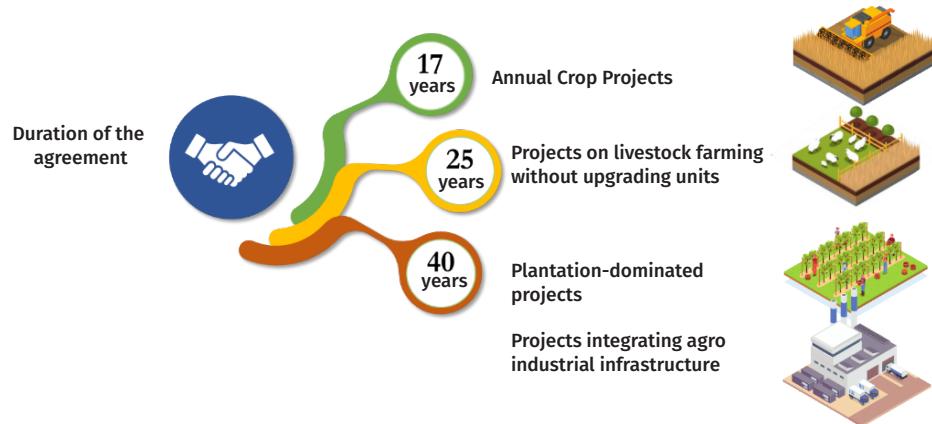
Selection process:

The selection process goes through the following 7 steps from the launch of the call for tenders to the handing over of the land to the partner:



Duration of the partnership agreement:

The partnership agreement is concluded for a period ranging from 17 to 40 years depending on the nature of the project:



As for habous land, the lease is concluded for a period of 10 years that might be renewed twice.

Rental fee:

The annual leasing rate is set in advance by the Administration for each project before the launch of the call for tenders and will be increased by 10% every 5 years.

Regarding habous land, the leasing rate is part of the evaluation criteria with a minimum set in advance by the Administration for each project before the launch of the call for tenders. It is increased upwards by 25% every 10 years.

Governance:

The governance of the partnership operation is ensured by four Inter-ministerial Commissions in charge of the public-private partnership operation around state owned farmlands:

Four inter-ministerial commissions responsible for the operation of the public/private partnership



The governance of the partnership operation around the habous lands is ensured by a joint commission (Ministry of Agriculture, Fisheries, Rural Development and Water and Forests and the Ministry of Endowments and Islamic Affairs).

Evaluation of tenders:

The evaluation of tenders is carried out according to the following criteria:

- The bidder's references;
- The technical, economic and financial coherence of the project;
- The level of investment;
- Aggregation;
- The degree of upstream-downstream integration of the project;
- Job creation;
- The leasing rate (for habous land).

Scoring grid template:

	large scale project *	Medium project **	Small project ***
References of the bidder	25	30	30
- The technical, economic, and financial coherence of the project	20	25	35
- The level of investment;	15	15	25
- Aggregation;	20	5	-
- The degree of upstream-downstream integration of the project	5	10	-
- Employment	15	15	10

* Large scale project (≥ 100 ha).

** Medium project (> 20 ha and < 100 ha).

***Small project (≤ 20 ha).

DELEGATED MANAGEMENT FOR IRRIGATION WATER (PPP in irrigation):

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

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

The first PPP project to be implemented is that of the Sebt El Guerdane citrus fruit perimeter in the Souss Massa Region. This project, since its inauguration in 2009 by His Majesty the King, has been monitored by operating performance and demonstrates satisfactory results of the PPP in irrigation with better efficiency in the management of the water service irrigation (97% as network efficiency and 99% as recovery performance for 2017).

The second PPP project is the co-financing, design, construction and operation of irrigation infrastructure in the coastal zone between Azemmour and Bir Jdid on 3200 ha. The delegation contract was signed in 2013 and the work to build the irrigation infrastructure was completed. The actual impoundment of the project took place in October 2021. Other projects will be launched, in the short term, within the framework of irrigation PPPs, in particular for the exploitation of the Kaddoussa perimeter (5,000 ha), the extension and modernization of lot 1 of Gharb on 30,000 ha and the irrigation of the plain of Saïs on 30,000 ha.



Seawater desalination projects:

Another program, relating to the desalination of seawater for irrigation, is also initiated. This is of particular importance given its direct contribution to the achievement of the objectives of the Green Morocco Plan, through support for the development of agricultural production with high added value, as well as the limitation of the environmental impacts generated by the overexploitation of groundwater resources (continuous decline in the level of the water table in some regions, worsening of water stress...).

As an illustration, MAPMDREF signed in June 2017 two agreements with a private partner to co-finance, design, build and operate, for a period of 30 years, the desalination and irrigation infrastructure on 15,000 ha in the plain of Chtouka (Souss-Massa-Drâa Region). Construction work began in July 2018. The gradual commissioning of the desalination plant started on 29/01/2022.



A second desalination irrigation PPP project in the Dakhla Oued Eddahab Region on an area of 5000 ha has been completed and will be the first project to be carried out under Law 86-12 on PPP contracts. The partnership contracts were signed in November 2019 with two private partners, Dakhla Water & Energy Company S.A. for the desalination plant and the wind farm, and TIRISMA S.A. for the irrigation

network, for a total investment amount of 2.2 billion dirhams with a contribution from private partners to the investment of about 500 million dirhams. The process of preparing the prerequisites for the entry into force of the contracts was completed in June 2022 and preliminary work was launched on 02/08/2022 on site.

The irrigated land will be subdivided, serviced and allocated to agricultural investors and young developers in the region as part of a project offer to be contracted within the framework of PPPs around agricultural land led by the Agency for Agricultural Development. The call for tenders for leasing this land for the benefit of private investors was launched on 05/09/2022 and the opening of bids is set for November 2022.

In addition, other structuring studies for two new desalinated water irrigation projects have been launched and focus on:

Project for the construction and management of the irrigation network of the Sidi Rahal perimeter from the Casablanca desalination plant:

As part of the construction of a seawater desalination unit that is planned to be built for the drinking water supply of Greater Casablanca by 2030, it is planned to carry out an irrigation project with a perimeter of about 5000 ha, located between Sidi Rahal and Azemmour, which will benefit from an endowment of 30 Mm³ from the Casablanca desalination plant.

Seawater desalination project for the irrigation of a perimeter in the region of Guelmim Oued Noun:

In order to develop irrigation in the region, which suffers from a lack of surface water resources, it is planned to carry out an irrigation project of 5,000 ha from desalinated water in the region of Guelmim Oued Noun.

Downstream development project of the Kaddoussa dam on oued Guir:

The project for the hydro-agricultural development of the Boudnib perimeter of 5000 ha downstream of the Kaddoussa dam is located in the region of Draa Tafilalt. The dam will mobilize on average about 30 Mm³ of which 10 Mm³ for the recharge of oases (825 ha) and the remaining 20 Mm³ will be able to irrigate the extensions of investors (3020 ha) and small and medium-sized entrepreneurs (1055 ha).

Hydro-agricultural development project in the south-east zone of the Gharb plain on 30,000 ha:

The hydro-agricultural development project of the South-East zone of the Gharb plain on 30,000ha (Zrar, Zirara, Zrar Extension, Beht extension, Beht East, Boumaiz) is programmed as part of the Generation Green 2020-2030 strategy and the National Drinking Water Supply and Irrigation Water Supply Program 2020-2027 launched by His Majesty King Mohamed VI in January 2020.

The perimeter of Gharb is one of the most important perimeters of the country, both by the extent of its surface area and by its high contribution to national agricultural production. The region owes its strategic place in the country's food security to the availability of water resources.

In this large perimeter, a potential area of 30,000 ha has been identified to be the subject of a first phase of development that will be irrigated from the Koudiat El Borna dam.

In 2022, Directorate of Irrigation and Agricultural Land Planning (DIAEA) in consultation with Regional Office of Agricultural Development of Gharb (ORMVAG) continues to carry out the feasibility and structuring study of the project as a Public-Private Partnership. Mission 1 on the technical feasibility study has been completed and mission 2 on structuring the PPP project is in progress.

PPP project for the operation of irrigation infrastructure in the Saïss plain:

The project covers an area of 30,000 ha and benefits from an endowment of 125 Mm³ from the Mdez dam. It essentially aims to safeguard irrigation in the Saïss plain, reduce the deficit in the Saïss aquifer (currently estimated at 100 Mm³/year), intensify agricultural development and sustain and improve the agricultural income of farmers in the project area.

The construction work of the project's infrastructure is underway, the completion of the works is scheduled for the end of 2023. The management of the project works is planned within the framework of a management delegated by a private operator who will be responsible for operating and managing the irrigation infrastructure. The private delegate will be selected through an international call for tenders. A study for the structuring of the project under delegated management and the choice of the delegate will be launched.

3.4. AGRICULTURAL FACTORS AND MEANS OF PRODUCTION

LEASING OF AGRICULTURAL LAND

Terms of leasing agricultural land from private owners:

Any investor, whether natural or legal person and whether of Moroccan or foreign origin, may enter into contracts for the lease of agricultural land from private owners for any period that suits him, except in the case of land located within the demarcated irrigation schemes. Indeed, within these perimeters, rental contracts are governed by the provisions of Articles 32 to 34 of Dahir No. 1-69-25 forming the Agricultural Investment Code.

The investor can rent an agricultural property from a private owner for the duration he wishes, except in irrigation schemes where this duration cannot be less than one crop rotation cycle. The emphyteutic lease is also possible.

Before the conclusion of any rental agreement that must be made in writing, it is required to inquire about the legal situation of the property and to check if it is not burdened. In addition, it is advisable to establish authentic contracts with notaries or Adouls, to legalize signatures, to register them with the registration and stamp services and to register them with the ANCFCC for properties registered or in the process of registration. On this basis, guarantees for a peaceful and peaceful enjoyment of the rented property may be offered.

OPTIMIZATION OF TECHNICAL CHOICES

Through its publications and the various IT solutions it develops, INRA offers a rich knowledge base that can be used to optimize technical choices to be made by the investor. The following aspects are a non-exhaustive illustration of this. For further details, please refer to INRA's official website at: www.inra.org.ma

The agricultural vocation of the land for a good choice of crops by region:

Optimal choice of speculations according to the ecological requirements of the crops, the type of soil, the shape of the land and according to the climate. The INRA has a database that covers several species over an area of more than 6.5 million hectares.

Advice on the fertility of cultivated soils in Morocco:

A GIS-Web expert system for the recommendation in fertilization of the main crops accessible via the net. The database covers several species over an area of more than 7 million hectares.

Agrometeorological prediction of cereal yields in Morocco:

INRA offers a Crop Growth Monitoring System CGMS expert system using meteorological and satellite indicators to predict yields. This system is useful for both investors and agricultural insurance.

SIG-palm to advise investors in phoeniciculture:

System allowing the mapping of plantations and the monitoring of bayoud risk areas in traditional palm groves, oases and extension areas.

TECHNOLOGICAL CHOICES

Technological choices mainly concern genetic material, cultivation techniques, and transformation processes. In addition to scientific publications, a hundred books and technical sheets covering most of these themes are available at INRA (Contact the Information and Communication Division).

Improvement, characterization and conservation of plant and animal genetic resources and natural resources :

INRA has listed in the official catalogue more than 280 productive varieties of better technological value and adapted to different biotic and abiotic stresses.

In cereals, the new range of varieties has resistance genes to the various fungal diseases associated with midge resistance. In addition, these varieties have several technological features developed in consultation with millers (See the catalogues published by INRA).

For oilseed crops, the latest varieties of rapeseed are characterized by low erucic acid content.

Several new varieties of cacti resistant to cochineal, and other interesting varieties of argan tree, and ecotypes of forest trees such as carob, or fruit trees are available at INRA for the benefit of investors.

In addition, and in addition to the development of two animal breeds for the benefit of breeders; INRA 180 and Deroua, databases on zoo technical performance and carcass characteristics have been compiled for several Moroccan sheep breeds.

Development of technologies that respect the productive environment, protect crops and the consumer:

- Water and soil management and conservation: Conservation agriculture, reasoning of crop installation work, fertilization and irrigation management;
- Development of integrated pest management on various crop and post-harvest speculations;
- Development of bio fertilizers and bio pesticides;
- New approaches in agricultural machinery: direct sowing, animal-drawn machines, machines adapted for the application of liquid fertilizers and/or pesticides, etc.
- Technologies for the optimization of animal production (artificial insemination, control of reproduction, etc.);
- Diversification and improvement of the food supply of livestock;
- Strengthening of public-private partnership through the creation of in vitro multiplication laboratories (date palm, argan tree, etc.).

Valorization of local agricultural products and by-products:

- Development of easy, simple and transferable transformation processes;
- Characterization and valorization of local and local products and by-products;
- Development and adaptation of preservation and storage techniques for extending the shelf life of plant and animal products;
- Assistance, supervision and support to agricultural cooperatives.

COMMITMENT OF DIRECT PRODUCTION COSTS

Direct production costs include inputs, labor, energy and, if this is the case, water for irrigation. The following elements give indications for a pre-evaluation of certain loads.

Salaries and social security contributions:

The guaranteed minimum wages in Morocco, in the agricultural sector (SMAG) and the industrial sector (SMIG), and the associated social charges are as follows:

Salary expense	Agricultural sector	Industrial sector
Guaranteed minimum wage	2193.62 MAD/ MONTH (SMAG)	2970.05 MAD/ MONTH (SMIG)
Senior level bonus	2years	5%
	5years	10%
	12years	15%
	20years	20%
	25years	25%
Social Security (CNSS)	P. Salary	4,29%
	P. Employers	8,60%

The SMAG and the SMIG are applied mainly to manual workers without any particular qualifications. For other skills, salaries remain negotiable and depend largely on the profiles required.

Electricity use costs:

A green tariff schedule is applied to operators carrying out an agricultural activity recognized by a certificate issued by the competent services of the MAPMDREF. The rates thus applied, expressed VAT included are indicative, as follows:

Pricing options	Fixed premium kW/ Year in MAD	Price per kWh in MAD			
		Peak hours		Regular hours	
		Winter	Summer	Winter	Summer
TLU	2 844,18	0,6874	0,6457	0,6228	0,5984
MU	1 279,88	1,3548	0,7724	1,0657	0,6755
CU	568,84	2,0220	0,8988	1,4646	0,7474

For further details, please contact the local sales department of the National Office of Electricity or obtain further details on their official website at: www.one.org.ma.

Costs of using irrigation water:

The pricing of irrigation water in Morocco is governed by the provisions of the Agricultural Investment Code (Dahir 1-69-25). The rates applied at the beginning of the 2022-2023 agricultural seasons in the perimeters of large hydraulics are as follows:

ORMVA	Perimeter / charging zone	Rate (MAD / m ³)
Gharb	Beht without lifting	0,32
	Beht with lifting	0,38
	Gharb gravity plain	0,38
Souss-Massa	Plain Gharb sprinkling	0,60
	Massa	0,77
	Souss Amont	0,74
	Issem Moderne	0,70
	Issem traditionnel	0,25
	Gravity sectors without lifting	0,27
Doukkala	Gravity sectors with lifting	0,36
	Boulaouane	0,54
	Zemamra	0,52
	T.Gharbia and Ext Faregh and S.Smail	0,51
	High Service	0,44

ORMVA	Perimeter / charging zone	Rate (MAD / m ³)
Loukkos	Rmel Drader	0,69
	Plain and Low Hills	0,62
	Gravity sectors Plaine RD	0,39
	Merja	0,47
Moulouya	Sectors without lifting (Triffa BS)	0,35
	Lifting sectors (Triffa HS)	0,65
	Perimeter of Garet	0,67
Tadla	Tarfata	0,50
	Tadla	0,28
	Haouz Central	0,35
Haouz	Tessaout upstream	0,31
	Tessaout downstream	0,30
Tafilalt	Tafilalt	0,24
Ouarzazate	Ouarzazate	0,24
Oued Mellah	Oued mellah	0,28

Source: DIAEA / MAPMDREF

Oil and Gas Products:

The prices charged in Morocco for petroleum products, including diesel, are liberalized and indexed on the basis of international quotations.

For gas products and with the exception of butane intended for household consumption, whose selling prices of bottles of different weights are determined by the State, the prices charged in Morocco are liberalized but are indexed to international quotations given the import by the country of the majority of its needs in this area.







LEGAL, NORMATIVE AND INSTITUTIONAL FRAMEWORK



4.1. SECTOR-SPECIFIC LEGAL FRAMEWORK AGRICULTURAL

AGRICULTURAL INVESTMENT CODE

Investment in the agricultural sector is specifically regulated by Dahir No. 1-69-25 of 10 Jumada I 1389 (25 July 1969) as subsequently amended and supplemented, which forms the Agricultural Investment Code. This defines the benefits that farmers can receive from the State, in the form of technical and financial aid, and the obligations incumbent on them as a result.

In terms of common provisions, State support could lead to:

- Bonuses and subsidies;
- Long, medium or short-term loans depending on the nature of the operations;
- Technical and material assistance from public services and in particular those of the government authority in charge of agriculture.

The specific provisions of the above-mentioned Code relate in particular to:

- The development of agricultural land in irrigation schemes, according to operating standards that take into account the vocation of the soil and economic imperatives, by reference to the crop rotation plan, cultivation techniques, the regulation of irrigation methods and the discipline of water use as well as the introduction of adequate animal speculation with a view to enhancing crop production and preserving soil fertility;
- The possibility of the State carrying out external and internal sanitation works as well as the operation and maintenance of primary, secondary and tertiary networks for dry-cultivable regions of the Kingdom where agricultural properties are threatened by floodwater, upwelling of groundwater or surplus surface water;
- The obligation to put agricultural land outside irrigation schemes and dry sanitation zones into use;
- The mechanism for monitoring the obligations imposed on farmers, by mobilizing properly constituted committees, as well as the sanctions that could be applicable to them in the event of deviations from the pre-established provisions.

TAX PROVISIONS SPECIFIC TO THE AGRICULTURAL SECTOR

Agriculture benefited from huge tax exemptions extended until the end of 2013. The tax exemption of the sector is supposed to promote, attract and develop private investment in this sector. The General Tax Code has instituted new provisions and tax benefits for the agricultural sector:

- Permanent exemption from income tax and corporate tax for small farmers with a turnover of less than DH 5,000,000;
- Reduced rate of 20% of the income tax and 17.5% of the corporate tax during the first 5 financial years from the first year of taxation;
- Exemption from VAT on sales of harvested products, equipment and inputs intended exclusively for agricultural use and the import of agricultural products and equipment, purebred live animals, fertilizers and plant material.
- Reduced rate of 7%, 10% or 14% of VAT on sales of certain specific products.

HEALTH CONTROL OF LIVESTOCK, ANIMAL PRODUCTS AND PRODUCTS OF ANIMAL ORIGIN AND ANIMAL FEED

Procedure for the control of live animals and animal products and feed:

The control of live animals including breeding products (semen, embryos, hatching eggs,), animal products, animal by-products and animal feed is carried out by the veterinary services under the ONSSA in accordance with the legislative and regulatory provisions in force, in particular:

- Law No. 24-89 and its implementing decree enacting veterinary health measures for the importation of animals, animal foodstuffs, products of animal origin, animal propagation products and seafood and fresh water;
- The aforementioned Law 28-07 on the safety of food products and the texts adopted for its application;
- Dahir of 24 chaoual 1397 (8 October 1977) on the sanitary and quality control of animal products and products of animal origin and the texts adopted for its application;

- Law 13-83 promulgated by Dahir No. 1-83-108 of 9moharram 1405 (5 October 1984) on the suppression of fraud on goods and the texts adopted for its implementation.
- The action of the veterinary services under the ONSSA is reflected in particular by:
- Negotiation of sanitary conditions with a view to establishing model veterinary health certificates for the import of live animals including animal propagating products (semen, embryos, hatching eggs...), animal products, animal by-products and feed;
- The approval and/or prior authorization by the ONSSA of establishments for handling, transformation, transformation, packaging, storage, distribution as well as food transport equipment;
- Health control of the conditions under which primary products, food and feed are handled, treated, processed, packaged, packaged, transported, stored, distributed, displayed for sale and those intended for export;
- Sampling of animal products or products of animal origin, animal feed as part of the control and surveillance plans set up by the ONSSA in the various animal sectors at the level of production establishments, points of sale and import;
- Direct findings when it comes to food health control operations, in particular the verification of conformity of their labeling and presentation in points of sale, in accordance with the regulations in force;
- Coercive actions are taken by the veterinary services materialized by the seizure and suspension of sale, when it comes to damaged, fraudulent, toxic or questionable quality products in accordance with the regulations in force.

Prior approval or authorization of establishments:

The authorization or approval of food and feed establishments and businesses in the health plan shall be issued prior to the placing on the market of these products.

The application for authorization or approval in terms of health must be addressed to the local veterinary service of the link of implantation of its unit.

Approval of lazarettos for the quarantine of animals (cattle, sheep, goats, equidae):

The health approval of lazarettos for the quarantine of certain animal species (cattle, sheep, and goats) for import or export (equidae) is issued by the veterinary services under the National Office for Food Safety (ONSSA).

The constitution of the application file for approval and the deadlines to be respected are specified in the codes of procedures in force, available on the ONSSA website under the Import/Export section www.onssa.gov.ma/?lang=en .

Veterinary health controls on import and export:

The importation of live animals and animal propagating products, animal products and products of animal origin, including fishery products and animal by-products, and feed, shall be subject to the laws and regulations in force, including:

- Law 24-89 promulgated by Dahir No. 1-89-230 of 22 Rabii I 1414 (10 September 1993) enacting veterinary health measures for the importation of animals, animal foodstuffs, animal products, animal propagating products and seafood and fresh water, and Decree No. 2-89-597 of 25 Rabii II 1414 (12 October 1993) adopted for the application of the aforementioned Law No. 24 – 89;
- The aforementioned Law 28-07 of 11 February 2010 on the safety of food products and Decree No. 2-10-473 of Chaoual 1432 (6 September 2011) taken for the application of certain provisions of Law No. 28 - 07- on the safety of food products.

This control is carried out at border inspection posts (PIF) including the Directorates of Control and Quality (DCQ) whose list is fixed by joint order of the Minister of Agriculture and Agricultural Development and the Minister of Finance and External Investment No. 1726-96.

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

The veterinary health control on imports consists of three successive stages:

a. A documentary check

It is a systematic step that consists in checking the content and form of import files (health certificates or documents, other documents accompanying the goods imported into Morocco).

b. An identity check

It is a question of checking the concordance between the elements identifying the consignment of imported animals or products and the health documents accompanying it.

c. Physical and analytical control

The physical control is intended to verify the health status of the animals and the safety of the products and their compliance with regulatory health requirements (e.g. labeling for products and clinical condition for animals). This check shall be carried out on a representative sample of each consignment of imported animals or products in order to carry out the necessary checks in accordance with the procedures and regulations in force.

The use of analytical investigations according to the health risk analysis approach is linked to the nature of the imported goods. To this end, the inspector shall take samples for analytical investigations to verify the conformity of the goods with the health requirements in force.

Poultry unit authorizations:

The authorization of poultry units is governed by:

- Law No. 49-99 on the sanitary protection of poultry farms, the control of the production and commercialization of poultry products, promulgated by Dahir No. 1-02-119 of 1 Rabii II 1423 (13 June 2002), and its Decree No. 2-04-684 of 27 December 2004;
- Order of the Minister of Agriculture, Rural Development and Fisheries No. 2124-05 of 15 December 2005 setting out the documents making up the application for authorization for the exercise of poultry farming, egg brooding, transport and distribution of live poultry as well as for the creation of egg packing or transformation centers, poultry slaughterhouses, establishments for cutting, transformation, wrapping, freezing meat and the commercialization of such meat and eggs for consumption;

- The Minister of Agriculture, Rural Development and Fisheries Decree No. 2125-05 of 15 December 2005 setting the health requirements to be met by marketed day-old chicks;
- Order of the Minister of Agriculture, Rural Development and Fisheries No. 2126-05 of 15 December 2005 setting the form and content of the health monitoring register for poultry farms and hatcheries;
- Order of the Minister of Agriculture, Rural Development and Fisheries No. 2127-05 of 15 December 2005 setting the common and specific sanitary and hygienic requirements to be met by premises, equipment and operation of poultry farms and/or hatcheries;
- Order of the Minister of Agriculture, Rural Development and Fisheries No. 2129-05 of 15 December 2005 setting the minimum distances to be respected between one poultry farm and another, or between a poultry farm and a hatchery or between two hatcheries.

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

The authorization to carry out the poultry farming activity must be sent to the local veterinary service of the location link of the unit subject to the application before any batch is placed.

Health and conformity checks on plant and plant products, food additives and food supplements:

The sanitary and conformity control of plant and plant products, food additives and food supplements are governed by laws and regulations, in particular:

Law 28-07 on food safety, promulgated by Dahir No. 1-10-08 of 26 Safar 1431 (11 February 2010) and the texts adopted for its implementation;

Law 13-83 promulgated by Dahir No. 1-83-108 of 9 Moharram 1405 (5 October 1984) on the suppression of fraud on goods and the texts adopted for its implementation;

Pursuant to these texts, the action of the services for the control of plant products and products of plant origin is reflected in:

a. The approval or authorization of health establishments and enterprises:

- Health approvals and authorizations are issued by the ONSSA for the benefit of establishments and companies for the treatment, transformation, packaging, packaging, distribution, storage or preservation of plant products and products of plant origin;
- The application for authorization or approval in terms of health is addressed to the local Plant Products and Plant Origin Control Service of the place where the establishment or food;
- The application form, the constituent documents of the application file and the deadlines to be respected are specified in the code of procedures in force relating to the granting of approvals and health authorizations to food establishments and businesses, available on the ONSSA website business is located.

b. Health control of the conditions under which primary products, food products are handled, treated, processed, packaged, packaged, transported, stored, distributed, and offered for sale:

- These controls consist of verifying compliance with hygiene conditions, risk control and product traceability at the level of food establishments and businesses. These controls are organized within the framework of a control plan based on risk analysis.

c. Control of regulatory compliance (quality and safety) of plant and plant products, food additives and food supplements:

These controls, carried out at the local market, import and export level, consist of:

- Sampling and analysis in official laboratories;
- Direct findings of infringements in the case of verification of the labelling, presentation and quantity of products;
- Precautionary measures materialized by the seizure and suspension of sale, in the case of damaged, fraudulent, toxic or questionable products.

These controls are carried out in implementation of control programs (permanent, reinforced, cyclical or other), control plans and monitoring plans.

c.1. Sanitary and export compliance control of plant and plant products:

This control consists in the issue, at the exporter's request, of a health certificate attesting to the quality and safety of the products intended for export.

The exporter or his representative shall submit an application for health certification to the local plant and plant products control service of the place where the production establishment is located. This request for verification shall be accompanied by the documents required by the procedure for health certification for exports of plant products and products of plant origin. This control goes through three steps:

Step 1: The documentary control: It consists of the verification of the form and content of the health documents to ensure the admissibility and conformity of the application and the accompanying file.

Step 2: The identity and physical control which consists of:

- Identify the lot or batches of products to be exported and check if they correspond to the documents presented;
- Physically inspect a representative sample of the lot or lots of products and their packaging;
- Check the compliance of the products to be exported with the requirements of the regulations in force in the country of destination.

Step 3: Analytical control:

This involves taking samples, carried out in the presence of the exporter or his representative.

This control consists in verifying the conformity of the results of analyses of the batches of the products to be exported with the requirements of the national regulations and those of the countries of destination. This control shall take into account the risks inherent in the product.

c.2. Sanitary Control and Import Compliance:

Sanitary control and import compliance are carried out by the ONSSA services under the Control and Quality Directorates (DCQ) and Border Inspection Posts (PIF) under the Regional Directorates of the ONSSA in accordance with the legislation and regulations in force.

For any request for import control, the operator or his representative must approach the local service concerned of the ONSSA (DCQ or PIF) for the transformation of his file.

Sanitary control and import compliance consist of three successive steps:

Step 1: A documentary check:

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

Step 2: An identity check:

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

Step 3: A physical check:

This control consists of:

- Physically inspect the goods and their packaging;
- Control, as appropriate, the means of transport and the temperature;
- Check the conformity of labeling and presentation.

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

This control is carried out on a representative sample of each batch of the imported goods in order to carry out the necessary checks in accordance with the regulations in force. Sampling is carried out in the presence of the importer or his representative and, where appropriate, a customs officer.

PLANT HEALTH CONTROL OF PLANTS AND PLANT PRODUCTS AT FRONTIERS AND WITHIN THE COUNTRY

The purpose of phytosanitary control is to prevent the introduction into the national territory of new potentially dangerous quarantine organisms and to limit their spread from one zone to another, by

checking at border posts the phytosanitary status of imported plants and plant products, by sanitary surveillance of crops within the country and by preserving the quality of export goods.

The regulatory texts governing the control actions of these products can be consulted on the ONSSA website, according to the link:

www.onssa.gov.ma/phytosanitary-control/?lang=en

Phytosanitary import control procedure:

At each import declaration, the operator or his representative shall lodge at the level of the plant protection service against a receipt, an application for phytosanitary inspection accompanied by the following documents:

- Original phytosanitary certificate issued by the competent authorities of the country of origin or provenance;
- Copy of the invoice certified by the importer;
- Copy of the seed import authorization;
- Technical Import Authorization (ATI) for rosacea and vine seedlings;
- ISTA Bulletin or Seed Analysis Report;
- Copy of customs declaration (DUM);
- Packing list;
- Copy of bill of lading or the air waybill (LTA);
- Non-GMO certificate for seed varieties not listed in the official catalogue of Morocco;
- Any other document required by regulation.

Phytosanitary control at import consists of:

- Documentary control;
- Identity check;

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

In view of the results of the control, the Plant Protection Service concerned issues a certificate of phytosanitary inspection on import (C.I.P.I) mentioning the decision of the control results.

Export phytosanitary control procedure:

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

This application, bearing a stamp of 20 Dhs, must contain all the information that may assist the inspector in carrying out the control for the issuance of the phytosanitary certificate, namely:

- Name and address of the sender;
- Country of destination;
- Means of transport;
- Name and address of the packing station;
- Goods (description, quantity, nature and number of packages, Origin,);
- Transformation carried out if applicable;
- Expected date for export.

Other documents (e.g. import permit, treatment certificate, document helping to trace the goods, etc.).

The inspection may take place either at the level of production fields or packing stations, or at the place of storage or at border posts.

This control makes it possible to ensure the phytosanitary status of the goods to be exported (absence of quarantine pests of the countries of destination and also other dangerous enemies) through the verification of documents, identification and physical inspection of the goods, in accordance with the phytosanitary regulations of the importing country. Laboratory testing and treatment can be undertaken when required.

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

Phytosanitary control of nurseries:

The control of nurseries is carried out in three stages:

- A first check is carried out following a production declaration made by the nurserymen to the regional plant protection service concerned, to ensure the species and quantities declared. At the end of this control a control card is issued to the nurseryman;
- The second control is carried out in full vegetation to ensure the phytosanitary status of the plants (absence or presence of diseases and / or pests);
- The third control, carried out at the time of uprooting of the plants, aims to ensure the work carried out by the nurseryman to prevent the spread of pests, on the one hand, and to observe the root system that could host pests, on the other hand. If the sanitary conditions are met, a pass is issued to nurserymen who prove that the nursery has been approved for the current commercialization year.

Control of wood packaging manufacturing units:

Any company carrying out manufacturing and transformation activities of wood packaging materials (pallets, boxes), intended for international trade must be approved by the National Office for Food Safety to acquire the right to apply the marking of standard 15 of the International Plant Protection Convention (IPPC).

In accordance with this standard, the phytosanitary certification system for wood packaging material aims at compliance with the application of phytosanitary measures, with a view to avoiding the introduction or spread of harmful organisms that may harm the national plant heritage.

The control and certification stages of packaging units consist of:

- Filing with the regional plant protection service (SPV) concerned of an application (SPV form) accompanied by the following documents: Certified copy of the company's statute, CIN copy of the

person in charge, Certified copy of the certificate of ownership of the premises or lease contract, Legalized copy of the patent or commercial register, Photos of the premises and the deposit, Certified copy of the authorization of the authorities, list of personnel and name of the technical manager, technical documents of the packaging transformation equipment;

- Documentary control;
- Identity and physical control of the unit and transformation equipment (furnace);
- Issuance of the certificate of conformity.

The list of authorized wood packaging units is available on the ONSSA website under the heading: Wood packaging: www.onssa.gov.ma/?lang=en .

SEED CONTROL

The production, control, certification and commercialization. of seeds are governed by the provisions of Dahir No. 1-69-169 of 25 July 1969, as amended by the Dahir containing Law No. 1-76-472 of 19 September 1977 and its implementing texts set out below.

- The 9 decrees approving technical regulations relating to the production, control, packaging and certification of straw cereal seed, maize, food legumes, fodder legumes, fodder crops, oilseed crops, sunflower hybrids, industrial and fodder beet, cotton, standard vegetable seeds and citrus fruits;
- Order No. 966-93 of 20 April 1993 setting the conditions for importing and commercialization of seeds to be cultivated in Morocco as amended and supplemented.

The objective of seed certification is to provide farmers with certified authentic and healthy seeds, which contributes to the improvement of agricultural production.

Only the production of varieties entered in the official catalogue may be accepted for inspection and certification.

Control with a view to certification shall be carried out at all stages of production. It is based on the control of the filiation of generations, from the starting material to the commercial seed. The checks carried out take place in three stages:

- Field checks;
- Laboratory checks;
- Ex post controls.

Field checks are carried out in accordance with the requirements of the technical regulations in force, and on the basis of the methods established by the OECD (Organization for Economic Co-operation and Development) schemes. These checks are carried out in two periods:

- Phytosanitary control, which consists of checking the technical conditions and the sanitary status of the crops;
- Varietal and specific control, which consists in determining impurities of plants of other species and varieties present in the propagation field.

Laboratory control is carried out on samples taken from approved field production. This control is carried out according to the methods of the International Association of Seed Analysis (ISTA) and includes two types of analyses: physiological analysis (germination) and physical analysis (specific purity, specific weight, humidity, weight of 1000 grains, number of seeds of other cereal species and other plants).

Seed lots that meet the field and laboratory control standards prescribed in the technical regulations shall be sealed and labeled after treatment. The labels shall bear the particulars of the products (species, variety, category, number, lot weight). They must be white for pre-basic and basic seed, blue for 1st generation seed and red for 2nd generation seed.

The ex-post verification is carried out in accordance with the requirements of the OECD schemes. It is exercised on seed lots of the different categories that have met the field and laboratory certification standards. It is systematic for pre-basic seed, 20% for 1st generation seed and 10% for 2nd generation seed. This control shall also apply to imported seed lots.

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

www.onssa.gov.ma/seed-and-seedlings/?lang=en

CONTROL OF CERTIFIED SEEDLINGS

The use of certified seedlings guarantees farmers varietal authenticity and sanitary quality. The certified seedlings are produced by nurserymen who have approved wood yards from varieties listed in the catalog, efficient, authentic, healthy and adapted to Moroccan pedoclimatic conditions.

The production, control, certification and commercialization of seedlings are governed by the provisions of Dahir No. 1-69-169, of 10 Jumada I 1389 (25 July 1969), as amended by the Dahir bearing Law No. 1-76-472, of 05 Chaoual 1397 (19 September 1977) and its implementing texts:

- Technical regulations relating to the production, control, packaging and certification of seedlings of olive trees, citrus fruits, stone and pome rosacea, vines, date palms, sugar cane, argan trees, saffron bulbs, fig trees, perfume roses, pomegranate trees and red fruit species (strawberry, raspberry, blueberry, mulberry, gooseberry and blackcurrant) and potato;
- Order No. 966-93 of 20 April 1993 setting the conditions for importing and commercialization of seeds to be cultivated in Morocco as amended and supplemented.

The technical regulations specify the criteria to be available to nurserymen, the categories of propagating plant material (start, pre-basic, base and certified), the production techniques and the different stages of control and certification.

The control of seedlings for certification shall be carried out at all stages of production. It is based on the control of the filiation of generations, from the starting material to the certified plant.

The check shall be carried out as follows:

- Control in the nursery to verify the origin of the plant material, isolation, rotation, number of plants produced, percentage of recovery, health status and varietal authenticity;
- Laboratory control shall cover the detection of diseases provided for in the species-specific technical regulation.

Only plants approved in nurseries and laboratories are certified. The latter shall bear a red label mentioning the name of the nursery, the name of the variety and the lot number. Certified seedlings may only be

marketed by approved bodies in accordance with the provisions of Decision of the Minister of Agriculture, Fisheries, Rural Development and Water and Forests No. 295 ONSSA / DPPAV / DCSP of 19 August 2021.

Registration of varieties:

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

- Order No. 863-75 of 22 September 1977 setting the conditions for the registration of varieties in the official catalogue;
- Order No. 864-75 of 22 September 1977 amended and supplemented by Order No. 3538-13 of 4 December 2013 on the composition and powers of the National Committee for the Selection of Seeds and Plants.

The inclusion of varieties in the official catalogue aims to protect users by providing them with high-performance varieties adapted to the country's soil and climate conditions.

All new varieties resulting from national breeding programs or introduced from abroad must undergo experimentation prior to listing. This experiment includes two types of tests conducted in parallel:

- A test for the distinctiveness, uniformity and stability of the variety (DUS);
- Agronomic and technological value (VAT) testing.

The test results (DUS and VAT) are reviewed by the technical sections. The latter submit their proposals to the National Committee for the Selection of Seeds and Seedlings (CNSSP) which will judge the varieties according to the results obtained and their economic interest for Moroccan agriculture.

The CNSSP's proposals are submitted to the Minister of Agriculture, who authorizes, by decree, the listing of the variety in the official catalogue. This decree also sets the period of validity of the registration, which is 10 years, and the conditions for re-registration.

The list of varieties listed in the catalogue is updated regularly and can be consulted at the following e-mail address:

www.onssa.gov.ma/seed-and-seedlings/varietys-homologation/?lang=en

Plant variety protection:

Law 9/94 on the Protection of New Varieties of Plants was promulgated by Dahir No. 1-96-255 of 21 January 1997. This law is in line with the provisions of the 1991 Convention of the International Union for the Protection of New Varieties of Plants (UPOV).

The Act entered into force on 28 October 2002, when the following implementing regulations were published:

- Decrees No. 2-01-2324 as amended;
- 6 Orders No. 1578-02, No. 1579-02 as amended, No. 1580-02, No. 1581-02, No. 1582-02 and No. 1806-18.

These above-mentioned regulatory texts are available at the following web address:

www.onssa.gov.ma/seed-and-seedlings/?lang=en

Plant variety protection by certificate makes it possible to recognize and guarantee the breeder's right. Protection applies to varieties belonging to genera and species whose list is fixed by order of the Minister responsible for agriculture.

New varieties with a denomination and which have the characteristics of distinctness, uniformity and stability may be protected by the plant variety certificate.

The right of obtaining it may be required by Moroccan or foreign natural or legal persons.

Applications for plant variety certificates for varieties for which distinctness, uniformity and stability (DUS) testing has been completed or the DUS examination report is transferred are reviewed by the National Seed and Plant Breeding Committee (CCPOV) which meets in April and September each year.

The term of protection begins from the date of publication of the order of the Minister of Agriculture protecting new plant varieties in the Official Bulletin. It is 20 years for field crop species, 25 years for arboreal species and vines and 30 years for date palm.

The list of new protected varieties is updated regularly and can be consulted at the following e-mail address:

IMPORT AND COMMERCIALIZATION OF SEEDS AND SEEDLINGS

The import and commercialization of seeds and seedlings are governed by Order No. 966-93 of 20 April 1993. This order provides, in particular, that:

- The establishment must be accredited;
- The variety must be entered in the official catalogue or on the provisional lists drawn up for this purpose;
- However, the foregoing provisions shall not apply to seed imported under the temporary importation procedure; such seed may not be marketed within the country;
- Seed must be certified according to the OECD scheme and meet EEC the United Nations economic commission for Europe (CEE-ONU) (standards or be of standard category for vegetable species).

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

APPROVAL FOR THE COMMERCIALIZATION. OF SEEDS AND PROPAGATING MATERIAL

Seeds and plants may only be marketed by bodies approved by order of the Minister for Agriculture, pursuant to Article 5 of the Dahir No. 1-76-472 of 19 September 1977.

The decision of the Minister of Agriculture, Fisheries, Rural Development and Water and Forests No. 295 ONSSA/DPPAV/DCSP of 19 August 2021 provides, for the granting of approvals for the commercialization. of seeds and seedlings, the following conditions, in particular:

- Approved establishments must only market seeds and propagating material belonging to varieties listed in the official catalogue for species with technical regulations;
- Establishments must have qualified agricultural technical staff with at least a diploma in agricultural technician and appropriate premises for the storage and conservation of seeds and seedlings and/ or means of production;

- Respect the obligations set by the inter professional agreements published in the official bulletin of the competent Administration;
- Establishments must submit their application for approval, accompanied by a file including the relevant documents, to the competent service of the ONSSA and must have a trade register and a statute, specifying an activity of commercializing seeds and / or seedlings;
- The period of validity of the authorization is limited to five years, renewable for five-year periods, provided that the establishments continue to fulfill the conditions laid down in that decision.

Applications for accreditation are examined by a committee composed of representatives of the administrative profession. The chairmanship and secretariat of this commission are provided by the ONSSA.

Approval shall be valid for a period of five years from the date of its publication in the Official Bulletin. It may be renewed following the submission of a new application for approval, seven (7) months before the expiry of the period of validity of the initial approval.

The list of establishments approved to import and market seeds and propagating material is updated regularly and can be consulted at the following e-mail address:

www.onssa.gov.ma/seed-and-seedlings/?lang=en

Benefits for services rendered:

The services for services rendered by the ONSSA for the approval of varieties, the protection of plant varieties, the granting of approvals, as well as the control and certification of seeds and seedlings are subject to payments whose amounts and method of payment can be consulted at the site level:

www.onssa.gov.ma/tarifs-des-prestations/?lang=en

REGULATIONS ON PESTICIDES FOR AGRICULTURAL USE

The legal arsenal regulating the import, manufacture, possession with a view to sale, offering for sale or distribution, even free of charge, of pesticide products for agricultural use consists in particular of the following texts:

- The Dahir of 2 December 1922 regulating the import, trade, possession and use of poisonous substances;
- Law No. 42-95, promulgated by Dahir°1-97-01 of 12 Ramadan 1417 (21 January 1997) on the control and organization of trade in pesticide products for agricultural use as amended and supplemented by Law No. 32-00 amending and supplementing Law No. 42-95 promulgated by Dahir No. 1 - 97-01 of 12 Ramadan 1417 (21 January 1997);
- Law No. 34-18 on plant protection products promulgated by Dahir No. 1-21-67 of 3 Hijja 1442 (14 July 2021);
- Decree No. 2-99-105 of 18 Moharram 1420 (5 May 1999) on the registration of pesticide products for agricultural use and Decree No. 2-99-106 of 5 May 1999 on the exercise of import, manufacture and commercialization. activities of pesticides for agricultural use;
- Decree No. 2-01-1343 of 28 Jumada II 1422 (17 September 2001) establishing the Commission on Pesticide Products for Agricultural Use.

Thus, it is required to obtain a certificate of approval or, failing that, a sales authorization from the ONSSA.

In addition, the registration of pesticides for agricultural use is carried out according to a procedure which aims to guarantee the efficacy, selectivity and safety of the product to be placed on the market. It follows an examination to verify their efficacy and safety with regard to humans, animals and their environment. Such verification may be carried out, in particular, by checking their physical, chemical, biological or toxicological behavior, possibly supplemented by biological tests carried out by the services responsible for plant protection.

After study, applications for registration are submitted to the opinion of the Commission des pesticides à agricole, established by Decree No. 2-01-1343 of 17 September 2001, which evaluates them. Approvals are then granted for a renewable period of ten years, after review, for the same period and at the request of the applicants. On the other hand, the authorization for sale is granted for a period of four years which can be extended for a maximum period of two years.

Natural or legal persons wishing to carry out the activities of manufacturing, importing, distributing and retailing pesticides for agricultural use must first obtain an approval issued by the MAPMDREF, after

verification of prerequisites related to the competence of the stakeholders and the quality of the premises to be used.

Also and in accordance with Law 28-07 promulgated by Dahir No. 1-10-08 of 26 Safar 1431 (11 February 2010) on the safety of food products, and Order of the Minister of Agriculture and Fisheries No. 1129-13 of 21 Jumada I 1434 (2 April 2013) relating to the maintenance and management register of primary products of plant origin, ONSSA ensures the establishment and control of registers at the level of farms and farms, tracing the use of chemical and organic materials for the maintenance and management of crops.

The list of registered agricultural pesticide products, the list of approved phytosanitary societies, the minutes of the meetings of the Agricultural Pesticides Commission and the regulatory texts that are published in the phytosanitary index at the following e-mail address:

www.onssa.gov.ma/?lang=en&s=eservice

REGISTRATION OF MEDICINES AND VETERINARY INPUTS

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

The manufacture, import and wholesale of veterinary medicinal products are governed by the following legal arsenal:

- Dahir No. 1-80-340 of 17 Safar 1401 (26 December 1980) promulgating Law No. 21-80 on the private practice of veterinary medicine, surgery and pharmacy;
- Decree No. 2-82-541 of 29 Jumada I 1403 (15 March 1983) adopted for the application of Law No. 21-80;
- Joint Circular No. 1/94 on the preparation of application dossiers for commercialization authorization for proprietary medicinal products for veterinary use;
- Joint Circular No. 834 of 7 June 2007 on Good Manufacturing Practices and Good Distribution Practices (Annex 1, Annex 2, Annex 3, Annex 4);
- Circular note on the pharmacovigilance procedure for veterinary medicinal products.

The registration and import authorization of biocidal products used in the livestock and agro-food industries are carried out in accordance with the provisions of the circular note on the authorization of farmed biocidal products (disinfectants, antiseptics, etc.).

The registration, authorization and commercialization of additives in pre mixtures of additives and complementary feeding stuffs for animal nutrition shall be governed by the following texts:

- The Dahir promulgating Law No. 28-07 on food safety and its implementing decree;
- The Order of the Minister of Agriculture and Fisheries No. 1490-13 of 03/05/2013 setting the list and maximum levels of undesirable substances in animal feed as well as the list and limits of use of additives, pre mixtures, compound feeds and complementary feeds intended for animal feed;
- The procedural code for the authorization of additives in pre mixtures of additives and complementary feeding stuffs for animal feed.

The regulatory texts governing medicines and veterinary inputs as well as the positive lists of authorized products are available on the ONSSA website at the following email address:

www.onssa.gov.ma/animal-diseases/?lang=en

LAND OWNERSHIP REGIME

The main rights that may be registered with the ANCFCC, by Article 65 of Law No. 14-07 promulgated by Dahir No. 1-11-117 of 25 Hijja 1432 (22 November 2011), supplementing and amending the Dahir of 9 Ramadan 1331 (12 August 1913) relating to land registration, concern:

- All facts and agreements inter vivos whether free of charge or for consideration;
- All reports of seizure of immovable property;
- All judgments that have become res judicata, having the object of constituting, transmitting, declaring, modifying or extinguishing a right in rem in immovable property;
- All leases of buildings exceeding 3 years;
- Any receipt or transfer of a sum worth more than one year's rent or rent not due;

- All acts such as forced mortgage, petitive action made in court to make known the ownership of a building, court orders and right of inheritance and legacy;
- All material operations tending to modify the nature, consistency or extent of the property, such as constructions and destruction;
- Certain particulars relating to civil status and the matrimonial regime tending to modify the civil status of the owners and holders of the real rights encumbering the registered immovable.

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

The mobilization of one million hectares of collective agricultural land as expressed by His Majesty the King may God assist him during the royal speech on the occasion of the opening of the first parliamentary session of the 3rd legislative year 2018-2019 of the 10th legislature, is a major pillar of the agricultural strategy that will make it possible to set up a new incentive system to encourage agricultural investments.

The legal texts governing this area are as follows:

- Dahir No. 1-21-70 of 3 Hijja 1442 (14 July 2021) promulgating Law No. 62-19 enacting special provisions relating to the acquisition by public limited companies or partnerships limited by shares, of agricultural or agricultural properties outside urban perimeters;
- Law No. 63-18 on the allocation to farmers of agricultural or agricultural land that is part of the private domain of the State;
- Law No. 62-17 on administrative supervision of Soulaliyate communities and the management of their property promulgated by Dahir 1-19-115 of 7 Hijja 1440 (9 August 2019);
- Law 63-17 on the administrative delimitation of community lands Soulaliyates promulgated by Dahir 1-19-116 of 7 Hijja 1440 (August 9, 2019);
- Law No. 64-17 amending and supplementing Dahir 1-69-30 on collective land located in irrigation schemes, promulgated by Dahir 1-19-117 of 7 Hijja 1440 (9 August 2019);
- Decree No. 2-19-973 of 9 January 2020 adopted pursuant to Law 62-17 on administrative supervision of Soulaliyate communities and the management of their property.

GENERALIZATION OF SOCIAL SECURITY FOR FARMERS

In order to generalize social security coverage for farmers and to implement the State's commitment to social protection policy for farmers and their families, the Government has put in place a legal and regulatory framework, namely:

- Decree No. 2-21-1019 implementing Law No. 98-15 on the basic compulsory health insurance scheme and Law No. 99-15 establishing a pension scheme for the categories of professionals, self-employed persons and self-employed persons exercising a liberal activity, with regard to farmers.

The said decree determines the modalities of application of the provisions of Articles 6 and 22 of Law 98-15 referred to above and the provisions of Articles 4 and 14 of Law 99-15 referred to above, for the category of farmers. To this end, it aims to:

- Determine the flat-rate income of farmers according to the area and type of land, irrigated or non-irrigated, taking into account the specificity of high value-added crops and greenhouse crops, the list of which will be fixed by an order of the government authority in charge of agriculture;
- Set the flat-rate income as follows:
- Between 0.65 and 6 times the value resulting from the multiplication of the legal minimum wage in non-agricultural activities fixed in accordance with the provisions of Article 356 of Law 65-99 on the Labor Code by the normal annual working hours for non-agricultural activities provided for in Article 184 according to each category;
- Designate the Department of Agriculture, the liaison body responsible for providing the CNSS with the information necessary for the inclusion of these categories;
- Set the rhythm of monthly payments for the payment of contributions to the CNSS as well as the registration procedures;
- Determine the effective date of registration on May 1st with the possibility of registering and benefiting from it before this date is opened.

- Decree No. 2-21-1017 supplementing the annex to Decree No. 2-18-622 of 17 January 2019 implemented Law No. 98-15 on the basic compulsory health insurance scheme and Law No. 99-15 establishing a pension scheme for the categories of professionals, self-employed workers and self-employed persons exercising a liberal activity.

The purpose of this decree is to supplement the annex relating to the list of categories and subcategories of persons falling within the categories of professionals, self-employed persons and self-employed persons exercising a liberal activity benefiting from the AMO and pension schemes, to include the following categories:

- Farmers;
- Craftsmen other than those subject to the single professional contribution scheme, and the Auto entrepreneur scheme and those keeping accounts.

OTHER REGULATIONS IN THE SECTOR

There are several other legal texts in the agricultural sector, namely:

- Law No. 80-21 establishing the National Agricultural Register, promulgated by Dahir No. 1-22-36 of 23 Chaoual 1143 (24 May 2022);
- Law No. 37-21 enacting special measures relating to the direct commercialization of fruits and vegetables produced within the framework of agricultural aggregation, promulgated by Dahir R ° 1-21-72 of 3 Hijja 1442 (July 14, 2021);
- Law No. 76-17 on plant protection, promulgated by Dahir No. 1-21-66 of 3 Hijja 1442 (July 14, 2021);
- Law No. 34-18 on plant protection products, promulgated by Dahir No. 1-21-67 of 3 Hijja 1442 (14 July 2021);
- Law No. 53-18 on fertilizers and growing media, promulgated by Dahir No. 1-21-68 of 3 Hijja 1442 (July 14, 2021);
- Law No. 113-13 on pastoral transhumance, development and management of pastoral and silvopastoral areas promulgated by Dahir No. 1-16-53 of 19 Rajab 1437 (27 April 2016);

- Law No. 39-12 on the organic production of agricultural and aquatic products, promulgated by Dahir No. 1-12-66 of 4 Rabii I 1434 (16 January 2013);
- Decree No. 2-22-475 (of 3 August 2022) adopted pursuant to Law 80-21 establishing the National Agricultural Register;
- Decree No. 2-22-243 of 21 Hijja 1443 (21 July 2022) adopted for the application of certain provisions of Law No. 76-17 on plant protection;
- Decree No. 2-17-620 of 19 Rabii I 1439 (8 December 2017) amending Decree No. 2-05-84 of 29 Chaoual 1426 (2 December 2005) setting the conditions to be met by imported milk intended for animal feed.

Other legal texts exist in the agricultural sector, particularly in terms of labeling, inter-branch and livestock, to which reference should be made to the official website of the MAPMDREF: www.agriculture.gov.ma

4.2. GENERAL LEGAL AND NORMATIVE FRAMEWORK

INVESTMENT CHARTER

Investment in Morocco is governed by framework law No. 03-22, which updates the entire framework of assistance and support mechanisms for both Moroccan and foreign companies. It repeals the previous charter (framework law No. 18-95 of November 8, 1995). This is a major text that guides the industrial policy of the kingdom and also aims to direct investments towards regions less favored than the major economic hubs of the Kingdom (Casablanca, Tangier, Rabat, Fes, etc.).

A key point for non-Moroccan investors, the charter also reaffirms the guarantee of repatriation of funds in foreign currency arising from foreign investments in Morocco.

In terms of criteria, to be eligible for assistance, the investor must either create at least 150 permanent jobs without a minimum investment amount or invest at least 50 million dirhams for a minimum of 50 permanent jobs created.

The charter details five types of cumulable common incentives. The first, ranging from 5 to 10% of the investment, relates to the created jobs and the committed capital. The second incentive is linked to gender and amounts to 3% if the female payroll exceeds 30% of the total. A third type of incentive is related

to "future professions" (biotech, 5G, automotive, electric vehicles, fintech, aerospace, railway, etc.) and amounts to 3%. A fourth incentive relates to sustainable development criteria (energy savings, renewable energies, etc.), and the company must implement water-saving or recycling measures to qualify. Finally, the fifth incentive, also at 3%, pertains to the level of local integration.

To be eligible, a company must conduct an activity with a local integration rate (purchases of goods and services in Morocco) exceeding 20% for agri-food or health and 40% for any other industrial activity.

In addition to these five incentives, a territorial incentive is granted to encourage investment in the less favored provinces, with an aid rate ranging from 10% (36 provinces known as A) to 15% (24 provinces known as B), depending on the zones.

Finally, a sectoral incentive can be granted for investments in priority sectors: tourism, industry, digital, transport, outsourcing, logistics, cultural activities, aquaculture, renewable energies, and waste valorization. This incentive amounts to 5% of the eligible investment made.

All these incentives can be cumulated up to 30% of a project. Investments in commerce, agriculture, and real estate are not covered by the provisions of the Investment Charter.

Note that the inclusion of land in the total eligible investments is subject to special treatment. In the case of rental, for example, eligible expenses are capped at seven years of rent.

The processing of applications is carried out by Regional Investment Centers (CRI), or directly by the Moroccan Agency for Investment and Export Development (AMDIE) or the relevant ministry for very large strategic projects.

SIMPLIFICATION OF ADMINISTRATIVE PROCEDURES

For the simplification of procedures and administrative formalities, Law No. 55-19 of 6 March 2020 has been put in place. This law concerns the fixing of maximum deadlines for the transformation of administrative acts, providing that a period of 30 days is set for the transformation of files of administrative acts necessary for the realization of investment projects, and 60 days for other administrative acts. In addition, the implementation of this project within the MAPMDREF has given rise to extensive coordination, collection, identification, transformation, selection and transcription work in consultation with the Minister of Digital Transition and Administration Reform.

The national portal www.idarati.ma has been set up to consult all procedures and administrative formalities.

In the same context, Decree No. 2-20-956 of 5 April 2021 concerns the application of the provisions relating to publication in the e-commerce register and the filing of summary statements of companies by electronic means, to this end, the said decree aims to develop a comprehensive national strategy to improve the business climate in Morocco.

The official website established by the Ministry of Justice for this purpose is as follows: servicesenligne.justice.gov.ma.

CUSTOMS PROCEDURE

Morocco has concluded preferential agreements with several countries and economic groupings providing for customs facilities and advantages. These result in different regimes which are applied to economic operators according to the specificities of the operations carried out. The main texts in force, namely the Customs Code and regulations, customs duty tariffs and agreements and conventions signed by the country, can be consulted directly on the official website of the Customs and Indirect Taxes Administration (ADII) of Morocco: www.douane.gov.ma

TAX REGIME

The provisions applicable in terms of taxes and duties derive in particular from the General Tax Code (CGI) and Law No. 47-06 promulgated by Dahir No. 1-07-195 of 19 Kaada 1428 (30 November 2007 relating to the taxation of Local Authorities, as amended and supplemented, as well as its implementing texts. These can be consulted on the official website of the Directorate General of Taxes (DGI) of Morocco: www.tax.gov.ma.

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

EXCHANGE RATE REGIME

In this context, the 2022 version of the General Instruction on Foreign Exchange Operations brings new liberalization and relaxation measures, both in terms of current and capital transactions, thus reflecting the irreversible orientations of foreign exchange regulations in terms of consolidation of the convertibility regime and simplification of provisions in favor of legal and natural persons.

The new measures include:

- The increase to two hundred million dirhams of the ceiling of annual transfers for investments abroad for legal entities;
- Support and encouragement of early stage innovative companies in new technologies (start-ups) by:
 - The increase of the e-commerce endowment to one million dirhams;
 - The possibility of making investments abroad.
- The easing of the rules for managing accounts in foreign currency and convertible dirhams for exporters:
 - The possibility of paying for imports of goods and services, in advance or with a deposit rate higher than the authorized ceiling;
 - The possibility of paying by international payment card all imports of services for the needs of the exporter's activity.
- Relaxation of the settlement regime for imports of goods and services:
 - An e-commerce endowment capped at 200,000 dirhams (determined on the basis of 100% of the tax paid), in favor of Moroccan legal entities that do not have an account in foreign currency or convertible dirhams, allowing to pay for imports of services by international payment card;
 - A 5% flexibility in the payment of deposits to avoid any blockage in case of exceeding the authorized deposit rate;

- Simplification of import settlement procedures in line with changes in international trade practices.
- The possibility of transferring the first tranche of 25% immediately after the funds are credited to the convertible term account;
- Reduction of the transfer period to three years instead of four.
- The consolidation of the regime for foreigners residing in Morocco;
- The consolidation and simplification of the system of grants granted to natural persons:
 - The establishment of a global allocation for personal travel of 100,000 dirhams plus an additional endowment of 30% of the IR, all capped at 300,000 dirhams per calendar year and per person;
 - This endowment can be used on the occasion of personal trips abroad of any kind (tourist, religious, medical care ...).

The provisions applicable to the exchange rate regime can be consulted on the official website of the Office des Changes of Morocco: www.oc.gov.ma/en.

CREATION 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 a Sole Partner (SARL AU);
- The general partnership (SNC);
- The Joint Venture (SP);
- The Limited Partnership (SCS) and the Partnership Limited Partnership by Share (SCA);
- The Simplified Joint Stock Company (SAS).

The SA is governed by Law No. 17-95 promulgated by Dahir No. 1-96-124 of 14 Rabii II 1417 (30 August 1996) on public limited companies, as subsequently supplemented and amended, in particular by Law No.

20-05 of 17 Jumada I 1429 (23 May 2008). The other forms of companies are governed by Law No. 5-96 promulgated by Dahir No. 1-97-49 of 05 Chaoual 1417 (February 13, 1997), on the general partnership, the simple limited partnership, the limited partnership by shares, the limited liability company and the joint venture, as amended and supplemented by Law No. 24-10 of 29 Jumada II 1432 (June 2, 2011). Law No. 19-20 of 14 July 2021 concerns the creation of the simplified joint-stock company.

The creation of a company requires the following procedures to be performed:

- Obtaining the negative certificate;
- Establishment of statutes;
- Establishment of subscription forms and, where applicable, contribution deeds;
- Freezing of the amount of paid-up capital;
- Establishment of the declaration of subscription and payment;
- Publication in the official bulletin and in a journal of legal announcements;
- Filing of deeds of incorporation and execution of registration formalities;
- Registration for the License and Tax Identification (IS, IR and VAT);
- Registration in the Trade Register;
- Affiliation to the CNSS and declaration of existence to the labour inspectorate.

The execution of the aforementioned formalities is facilitated by the investor assistance window in place in each Regional Investment Center (CRI). In this regard, further details can be obtained on the official website set up by the Ministry of the Interior for this purpose: www.cri-invest.ma

CONSTITUTION OF A COOPERATIVE

Cooperatives are governed by Law No. 112.12 of 18 December 2014 promulgated by Dahir No. 1 - 83 - 226 of 9 Moharram 1405 (5 October 1984), establishing the general status of cooperatives and the missions of the Office for the Development of Cooperation (ODCO) as amended and supplemented and its implementing texts.

The incorporation procedure then includes the following main steps:

- Application for approval of the name: is made to the ODCO, it is (signed by at least 5 persons (natural or legal), the ODCO grants a certificate of approval of the name of the cooperative;
- Incorporation procedures: Signature of the statute by all members, subscription to the capital and valuation of shares, if applicable, and payment of paid-up capital to a banking institution;
- Receipt from the local administrative authority: submission of the cooperative's file to the local administrative authorities against a receipt. This file includes the following documents:
 - The statute of the cooperative signed by the constituent members and approved by the competent authorities;
 - The list of cooperative members with the shares and capital subscribed as well as the paid-up capital;
 - Copies of identity documents of all members as well as officials of administrative and management bodies;
 - A bank certificate of paid-up capital;
 - Valuation minutes of subscribed units.
- Registration at the local register of cooperatives is done with the court of first instance, which issues a certificate of registration. The registration dossier shall include the following documents:
 - The certificate of approval of the name of the cooperative issued by the ODCO;
 - The receipt from the local administrative authority;
 - The statute of the cooperative signed by the constituent members and approved by the competent authorities;
 - The list of cooperative members with the shares and capital subscribed as well as the paid-up capital;

- Copies of identity documents of all members as well as officials of administrative and management bodies;
- A bank certificate of paid-up capital;
- Valuation minutes of subscribed units.
- Notification of the administrations concerned: deposit of a copy of the cooperative's file as well as the certificate of registration with the regional services of the ODCO and the technical administration concerned by the cooperative's activity.

ESTABLISHMENT OF AN ECONOMIC INTEREST GROUP (EIG)

Law No. 13-97 promulgated by Dahir No. 1-99-12 of 18 Chaoual 1419 (5 February 1999), relating to the economic interest grouping. It is an intermediate form between a company and an association and can only have as its object the extension of the activity of its members which allows them to carry out joint actions while maintaining their independence.

An EIG has the following characteristics:

- It is governed by a legal act signed between its members;
- It may be civil or commercial in nature. That character is derived either from the status of its members where they are all traders or non-traders, or from the activity actually carried out by the EIG where it is composed of both traders and non-traders;
- Contributions are not an essential element of the constitution of the EIG. In their absence, the rights of the members derive from their participation predefined in the statutes;
- The name of the EIG must be made in such a way that it can only be used by him and must be indicated on the acts and documents emanating from the grouping with the mention 'EIG'.

LABOUR LEGISLATION

Moroccan labor legislation, as defined in Act No. 65-99 promulgated by Dahir No. 1-03-194 of 14 Rajab 1424 (11 September 2003) on the Labor Code and its implementing regulations, is characterized by its

consistency with the international standards provided for in United Nations conventions and by specialized organizations in the field of labor.

The rights protected by employees whose exercise, both inside and outside the structure, is guaranteed include those contained in ratified international labor Conventions and the rights provided for in the main conventions of the International Labor Organization, which include:

- Freedom of association and the effective adoption of the right to organize and collective bargaining;
- The prohibition of all forms of forced labor;
- Effective elimination of child labor;
- Prohibition of discrimination in employment and occupation.

In addition, during the procedure for the settlement of individual or collective labor disputes, the following shall be taken into consideration in order:

- The Labor Code, conventions and international charters ratified in this area;
- Collective agreements;
- The employment contract;
- Arbitration decisions and case law;
- Custom and usage if they are not in contradiction with the provisions of the Labor Code;
- The general rules of law;
- The principles and rules of equity.

Finally, the Labor Code, supplemented, where appropriate, by the statutes, provides a comprehensive framework for personnel administration, thanks to the various aspects contained, such as those set out below.

- The different forms of the employment contract (CDI, CDD, CTD, ANAPEC ...);
- The collective labor agreement;

- Collective bargaining;
- Working conditions: working hours, protection of minors and women, health and safety, etc;
- Professional unions, employee delegates, works council and union representatives in the company;
- Intermediation in recruitment and hiring;
- Control bodies;
- Methods of settling collective labor disputes...

Further details can be found on the official website of the government employment authority: www.emploi.gov.ma.

ENVIRONMENTAL REQUIREMENTS

In accordance with the 2011 constitution, which enshrined sustainable development as a right for all citizens, and the provisions of Framework Law 12-99 on the National Charter for the Environment and Sustainable Development, Morocco has developed its National Sustainable Development Strategy (NSDS) adopted at the Council of Ministers chaired by His Majesty King Mohammed VI on June 25, 2017. The NSDS is supported by legal measures. A number of laws have been promulgated or are being prepared, including:

- **Protection and enhancement of the environment:** This is Law No. 11-03, which sets out the guiding principles for environmental protection and management. It deals with obligations that pose a risk to the environment and provisions to combat pollution and nuisances. It also deals with environmental management instruments such as norms and standards, impact studies and emergency plans.
- **Environmental impact assessments:** Decree No. 2-04-563 on the powers and functioning of the national committee and regional committees for environmental impact studies in all sectors. Decree No. 2-04-564 laying down the procedures for the organization and conduct of the public inquiry relating to projects subject to environmental impact studies (internal link).
- **Water quality:** Pursuant to the provisions of Law No. 10-95 on water (Article 51) and its implementing regulations, in particular Decree No. 2-97-787 of 4 February 1997 on quality

standards and the inventory of the degree of water pollution, several water quality standards have been prepared setting out the requirements that an environment must meet according to the different uses. These are:

- **Drinking water:** Joint Order No. 1277-01 of 17 October 2002 setting standards for the quality of surface water used for the production of drinking water – B.O No. 5062 of 5 December 2002: The main objective of this standard is to define the quality of surface water intended for the production of drinking water and the treatment methods corresponding to each category;
- **Irrigation water:** Joint Order No. 1276-01 of 17 October 2002 setting standards for the quality of water intended for irrigation – B.O No. 5062 of 5 December 2002: The promulgation of this decree aims to define the quality of water to be used for irrigation and especially purified wastewater to ensure protection of citizens against the various waterborne diseases carried by this water and optimal production;
- **Surface water:** Joint Order No. 1275-01 of 17 October 2002 defining the surface water quality grid – B.O No. 5062 of 5 December 2002: This standard grid, whose main purpose is the classification of surface water according to the values of pollution indicator parameters, is also the basic reference for carrying out the various inventories of water quality provided for by Law No. 10-95 on water and its implementing texts;
- **Fish water:** Order No. 2028-03 of 5 November 2003 setting the quality standards of fish water – B.O No. 5196 of 18 March 2004: The purpose of this standard is to define the quality objectives that an environment must meet to be suitable for fish life.
- **Waste management:** Decree No. 2-07-253 classifying waste and establishing the list of hazardous wastes, Decree No. 2-09-139 on the management of medical and pharmaceutical waste, Decree No. 2-09-284 on the establishment of administrative procedures and technical requirements for controlled landfills, Decree No. 2-09-285 on the preparation of prefectural and provincial master plans for household waste, Decree No. 2-09-683 setting the procedures for the development of the master plan regional management of non-hazardous industrial, medical and pharmaceutical waste, ultimate, agricultural and inert waste and the procedure for organizing the public inquiry relating to this plan;

- Draft decree on the establishment of the national plan for the management of hazardous waste;
- Draft decree laying down the technical details of waste incineration and co-incineration;
- Law No. 28-00 on waste management and disposal;
- The fight against air pollution:
 - Act No. 13-03 on combating air pollution;
 - Draft decree establishing air quality standards and establishing air quality monitoring networks;
 - Decree No. 2-09-631 setting the limit values for the release, emission or discharge of pollutants into the air from fixed sources of pollution and the procedures for their control.
- **Protection of coastal zones:** Bill No. 31-06 on the protection and development of the coastline. Environmental Information Exchange: Draft Law on the Public's Right of Access to Environmental Information and Participation in Decision-Making;
- **Soil conservation:** Draft law on soil protection, the fight against the nuisances caused by persistent organic products: Draft decree n ° 2-09-243 establishing the polychlorinated biphenyl commission "PCBs".

For more details, please refer to the official websites of the governmental authority for the environment: www.mem.gov.ma and www.equipement.gov.ma/eau/.

NORMATIVE FRAME OF REFERENCE

In general, standards contribute to increasing the reliability and performance of the goods and services concerned and are the basic reference points for any system of certification and control of their conformity.

Moroccan standards dealing with agribusiness are structured as follows:

- Plant products;
- Canned fruit and vegetables;
- Other products derived from fruit and vegetables;

- Milk and derived 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	Common 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

NORMALIZATION

Standardization is the activity that aims at the development of standards. It is governed in particular by the following texts:

- Law No. 12-06 on standardization, certification and accreditation promulgated by Dahir No. 1-10-15 of 26 Safar 1431 (February 11, 2010);
- Dahir No. 1-70-157 of 26 Jumada I 1390 (30 July 1970) relating to industrial standardization, with a view to the search for quality and the improvement of productivity, as amended and supplemented in particular by Law No. 1-93-221 of 10 September 1993;
- Decree No. 2-70-314 of 6 Chaâbane 1390 (8 October 1970) establishing the composition and attributions of the bodies responsible for industrial standardization, with a view to the search for quality and the improvement of productivity;

- Decree No. 2-93-530 of 03 Rabii II 1414 (20 September 1993) adopted for the application of Dahir No. 1-70-157 of 26 Jumada I 1390 (30 July 1970) relating to industrial standardization with a view to the search for quality and the improvement of productivity.

The standardization unit is composed of clusters responsible for the following sectors:

- Chemistry and Para chemistry;
- Agribusiness;
- Textiles and leather;
- The mechanical and metallurgical industries;
- Electrical and electronic industries;
- Building and public works;
- Health, safety, quality and environment;
- Services, crafts and documentation.

Technical work on the development of Moroccan standards is carried out by Technical Standardization Committees (TNCs). It takes place in 7 main steps as illustrated by the following diagram:



CERTIFICATION

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

- Certification of quality management systems (ISO 9001: 2008);
- Certification of environmental management systems (ISO 14001: 2004);
- Certification of occupational health and safety systems (NM 00.5.801:2009);
- Certification of industrial and agro-food products according to the corresponding Moroccan specification standards;
- Labeling of industrial and agro-food products according to the corresponding Moroccan standards;
- Certification of hazard analysis systems and critical control points (HACCP);
- Certification of food safety management systems (ISO 22 000);
- Certification of social compliance (NM 00.5.601);
- NM certification of products: The NM certification of a product results in obtaining the right to use the NM mark on the certified product.

NM Mark:

The NM mark is voluntary national certifications mark which, affixed to a product, certifies that the latter has been assessed and certified in accordance with the relevant Moroccan standards.

Certification standards:

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

- The circular on the attribution of the right to use the mark of conformity to Moroccan standards on products;
- The circular specific to the product and which essentially sets out the modalities of self-control;

- The standards of specifications and tests of the said product.

ISO 22000 certification:

ISO 22000 is the only international standard to date harmonizing food safety management practices. It is applicable to all the stakeholders in the food chain.

The ISO 22 000 standard identifies four main blocks that are closely linked:

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

Certification is thus the assurance provided to the various stakeholders in the food chain of a more effective and dynamic control of food safety hazards, the ability to continuously provide safe finished products that meet both customer requirements and international regulatory requirements for hygiene and food safety.

HACCP certification:

HACCP is an abbreviation of the English expression: "Hazard Analysis of Critical Control Points" which translates as "Hazard Analysis - Critical Points for their Control". This is a voluntary certification mark attesting that the system of the body concerned has been assessed and certified in accordance with the following standards:

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

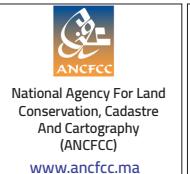
This certification is aimed at companies in the agro-food sector or with customers or suppliers in this sector.

Stakeholders in certification when it is done by the Ministry of Industry and Trade:

- Certifying body: the Ministry of Industry which does so through the Moroccan Institute of Standardization (IMANOR). It was created by Law No. 12-06 and its implementing texts. He then took over the activities carried out in the past by the Moroccan Industrial Standardization Service (SNIMA);
- Technical Certification Committees (CTCs): they are established by decree, on the proposal of IMANOR;
- Qualified verification officers/auditors, in charge of verification and surveillance visits;
- Accredited testing laboratory.

4.3. INSTITUTIONAL FRAMEWORK

The institutional framework, as described below, includes the MAPMDREF, in its capacity as governmental authority in charge of agriculture, the entities under its supervision, each specialized by field of intervention and, where appropriate, by territory concerned, as well as professional organizations.

 <p>المملكة المغربية Royaume du Maroc وزارة الفلاحة والصيد البحري التنمية الريفية والبيئة Ministère de l'Agriculture et du Développement Rural et des Eaux et Forêts www.agriculture.gov.ma</p>	 <p>ادارة التنمية الريفية Agency for Agricultural Development (ADA) www.ada.gov.ma</p>	 <p>ادارة التنمية في الازواد والشجرة الارقانية ANDZOA Agence Nationale pour le Développement des Zones Oasiennes et de l'Argan www.andzoa.ma</p>	 <p>ادارة التنمية الريفية Regional Agricultural Development Offices (ORMVA) www.agriculture.gov.ma</p>	 <p>ادارة الكيمياء والتحليل LOARC Official Laboratory of Chemical Analysis and Research (LOARC) www.loarc.org</p>	
 <p>الجامعة الوطنية للبحث الزراعي Institut National de la Recherche Agronomique National Institute of Agricultural Research (INRA) www.inra.org.ma</p>	 <p>ادارة الارض وال Catastre et la Cartographie ANCFC National Agency for Land Conservation, Cadastre And Cartography (ANCFC) www.ancfcc.ma</p>	 <p>ادارة التحفيز لمحب ومحب الخيل SOREC Royal Society for the Encouragement of the Horse (SOREC) www.agriculture.gov.ma</p>	 <p>الجامعة الوطنية للزراعة ادارة التربية والتكوين ENA National School of Agriculture (ENA) www.enameknes.ma</p>	 <p>ادارة التسويق SONACOS National Seed Marketing Society (SONACOS) www.agriculture.gov.ma</p>	 <p>ادارة المجلس الوطني للسلسلة الغذائية Office National du Conseil Agricole National office of agricultural council www.onca.gov.ma</p>
 <p>ادارة الارجهان والكتفاف ONICL National Interprofessional Office For Cereals And Legumes (ONICL) www.onicl.org.ma</p>	 <p>ادارة الزراعة والطب البيطري Hassan II Agricultural And Veterinary Institute (IAV) www.iav.ac.ma</p>	 <p>ادارة التصدير Autonomous Export Control and Coordination Establishment (EACCE) Web2.eacce.org.ma</p>	 <p>ادارة الحاويات SOSIPO Port Silos Society (SOSIPO) www.sosipo.com</p>	 <p>ادارة السلامة الغذائية ONSSA The national office of food safety www.onssa.gov.ma</p>	

Focus on the Agency for Agricultural Development

Since its establishment in 2009, the Agency for Agricultural Development (ADA) has played a fundamental role in achieving the strategic ambitions set out for the agricultural sector.

It is involved in many areas, such as land mobilization, the development of agricultural aggregation projects, the development of solidarity agriculture, the promotion of local products, the mobilization of financing, engineering and project monitoring.

ADA also plays an important role in sustainable development. This earned it accreditation with the Adaptation Fund and the Green Climate Fund and access to funding from these donors

Main professional organizations

FIMA SUGAR	Moroccan Inter professional Sugar Federation www.fimasucre.ma	APEFEL	Moroccan Association of Fruit and Vegetable Exporting Producers
FIMA MILK	Moroccan Interprofessional Milk Federation www.fimalait.ma	FIMA ASPAM	Association of Citrus Producers in Morocco
FISA	Inter professional Federation of the Poultry Sector www.fisamaroc.org.ma	ASPEM	Association of Producers / Exporters of leaf vegetables, vegetables and early vegetables in Morocco
FNM	National Milling Federation www.finm.org.ma	FIMD	Moroccan Inter professional Federation of Dates
FEDAM	Federation for the Development of Arboriculture in Morocco	UNAPPSM	National Union of Associations of Sugar Plant Producers of Morocco
FIMAR	Inter professional Federation of Red Meats	AMABIOPP	Moroccan Association of the Organic Production Sector
FCG	Federation of fats industries in Morocco	FIMAP	Moroccan Inter professional Federation of Beekeeping
INTER PROLIVE	Moroccan Interprofessional Federation of Olive	FIMA ROSE	Moroccan Inter professional Federation of Perfume Rose
FENAGRI	National Agri Food Federation	FIMA SAFRAN	Moroccan Inter professional Federation of Saffron
FICOPAM	Canning Industries Federation of Agricultural Products of Morocco	FIMA ARGAN	Moroccan Inter professional Federation of the Argan Sector
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
		ANPCL	National Association of Cereal and Legume producers
		FNM	National Federation of Milling
		AUTRES ORG	Southern Provincial Associations of Camel Breeders





COMMERCIALIZATION OF AGRICULTURAL INPUTS AND PRODUCTS

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5.1 INTERNAL MARKET

COMMERCIALIZATION CHANNELS IN MOROCCO (overview)

The commercialization of products in the domestic market is carried out through the following main channels:

- Large and medium-sized supermarkets: these have recorded a sustained growth rate since the 80s. Thus, the number of hypermarkets increased from 6 in 1997 to more than 500 at the end of 2020;
- Network businesses and franchises: they experienced rapid development from the 90s. In addition, since 2005, the sector has recorded a growth rate of more than 20% and, in 2010, Morocco had nearly 330 franchise networks with more than 2200 points of sale that are concentrated in major cities, mainly Casablanca and Rabat;
- Commercial public spaces under the responsibility of the municipalities: whether wholesale markets or slaughterhouses, these spaces prevail in terms of supplying the local market with fruit, vegetables and meat. To this end, they have a multitude of assets.

BROAD REGIONAL COVERAGE

- Large volumes of transactions processed at certain wholesale markets;
- The possibility of their concession to the private sector (e.g. Casablanca slaughterhouses); An important role in setting product prices;
- A health control system, *inter alia* applied to slaughter, and guaranteeing the quality of products to the consumer;
- Local commerce: it occupies an important place in the national economy because of its participation, in particular, in job creation. This mode of trade, economically and socially anchored in national identity, contains countless assets, the most significant of which are:
 - Proximity to consumers;
 - Established practices of payment facilities granted by merchants to customers;

- Adapted opening hours;
- A personalized service associated with a personalized contact between merchants and customers.

FOCUS ON AGRO-SUPPLY

Seed market:

The importation and commercialization of seed shall be governed by the regulations stipulating, in particular, that the establishment must be approved, that the variety must be entered in the official catalogue or on the provisional lists, that the seed must be certified in accordance with the OECD scheme and meet EEC standards or be of the standard category for vegetable species, and the introduction of limited quantities of new varieties for testing. In this regard, nearly 80 private institutions are approved to import and market seeds in Morocco. They operate in particular in the fields of vegetable seeds, oilseeds and maize.

In addition, the seed sector includes a set of integrated activities, ranging from varietal breeding to the commercialization of certified seed. Its main links relate to the activities of breeding, propagating, packaging and commercializing seeds.

From an economic point of view, the seed sector achieves an average annual turnover of around 600 MMAD, while its potential turnover is MAD 2.7 billion.

Fertilizers market:

The liberalization of the fertilizer sector took place in Morocco in July 1990. From this date, interested parties can freely source fertilizer from the local or international market. The MAPMDREF had, for its part, the mission of monitoring and evaluating the supply of the national market, through:

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

In terms of fertilizer consumption, an upward trend has been recorded since 2000. However, there is a large gap between the theoretical requirements and the volumes of fertilizers actually used. Indeed, the annual consumption of fertilizers is 500 thousand T and 1.1 million T.

Agricultural products market:

The MAPMDREF is equipped with a market monitoring and analysis system that allows to know in real time the dynamics of agricultural markets. The system focuses on the ASAAR information system, which is a powerful decision-making tool for public and private stakeholders, offering useful information on prices and market conditions. Thus, it makes it possible to collect, process, analyze and disseminate information on agricultural markets in real time.

The information system on prices of agricultural products introduced in 2011 is equipped with qualified human resources, adequate infrastructure and methodological instructions that meet quality statistical standards. This allows the system to be operational on a daily basis and cover all regions of the Kingdom.

The price monitoring system is fed in real time thanks to the mobilization in the field of experienced investigators and a central team responsible for transformation and analyzing the transmitted prices. Currently the scheme covers all regions for nearly 150 agricultural and food products including animal products and animal feed. Thus, it deploys nearly 100 investigators spread over 50 provinces.

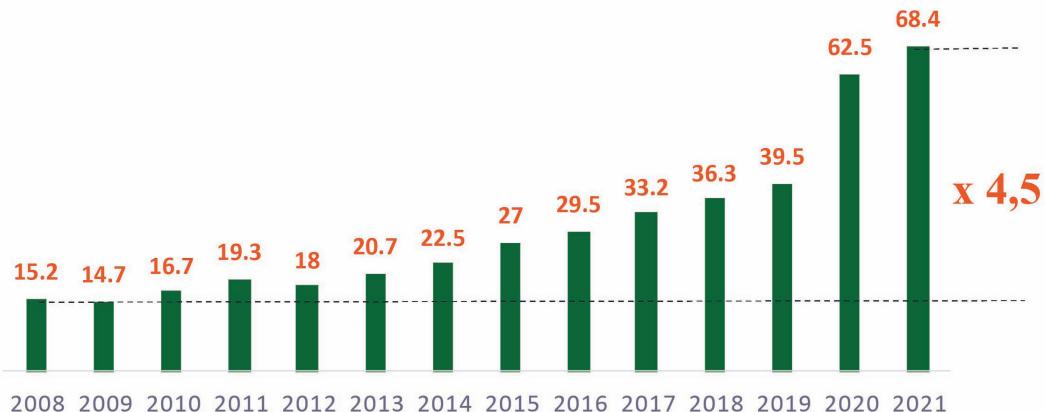
Price collection takes place at different levels of the commercialization chain. The system makes it possible to monitor prices on a regular basis at the following stages:

- Wholesale stage: 11 wholesale markets are covered, with fruit and vegetables as the main products monitored;
- Retail stage: two levels of detail are collected, namely points of sale and supermarkets and supermarkets. Nearly 70 consumer products are affected by this stage;
- Rural Souks: the prices of Live Animals, Cereals, Legumes, Livestock Feed and Fertilizers are collected every week at these markets;
- Community slaughterhouses: prices cover red meat and poultry products.
- The collection also includes a component of business surveys to monitor prices during the month of Ramadan and on the eve of the Eid Al kbir festival.

The link for: asaar.agriculture.gov.ma.

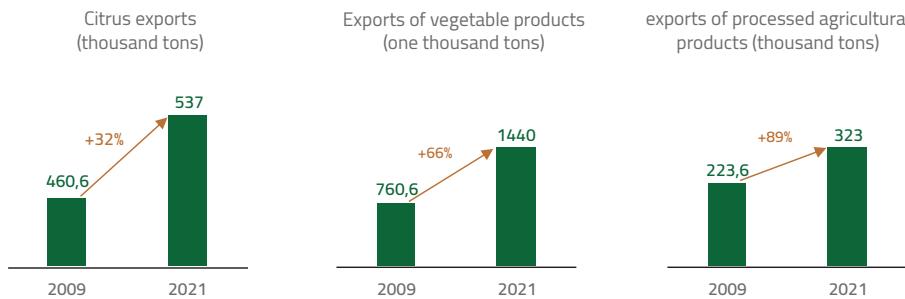
5.2 EXPORT MARKET

Evolution of Moroccan exports in agricultural products (Billion dirhams)



As part of the PMV implementation aimed at modernizing the agricultural sector, Morocco has given pride of place to agricultural trade policy.

Despite the difficult global situation marked by the economic crisis of 2008-2012, the COVID 19 pandemic of 2020-2021, the measures undertaken by the Department of Agriculture for the promotion of foreign trade contributed to the 4.5-fold increase in the value of agricultural exports between 2008 and 2021, from 15.2 billion dirhams to 68.4 billion dirhams. This performance is due to the strong growth in exports from all export sectors.



In 2020, the agricultural sector represented the third source of currency with exports totaling 62.5 billion MAD after the automotive sector and remittances from Moroccans living abroad. This trend is expected to further strengthen in the coming years, given the dynamism and policies implemented (Generation Green Strategy 2020-2030). The contribution of this sector to the total value of Moroccan exports ranges between 13% and 16%.

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

The dynamic experienced by the agricultural export sector in recent years has enabled Morocco to become one of the world's leading exporters. Morocco is in the TOP 5 of world exporters for the following products:

- 1st world exporter of capers;
- 1st world exporter of argan oil;
- 3rd largest exporter of canned olives in the world;
- 3rd largest exporter of citrus fruits in the world.

COMMERCIAL AGREEMENTS BETWEEN MOROCCO AND THE FOREIGN COUNTRIES

The agreements described below relate some of those signed by Morocco with its main trading partners. For further details, please refer to the official website of the government authority in charge of foreign trade at the following address: www.mcinet.gov.ma/en.

Morocco-EU Agreement:

The agricultural agreement concluded between Morocco and the EU in 2010 on reciprocal liberalization measures on agricultural products, processed agricultural products and fishery products is part of the 1996 Morocco-EU Association Agreement. This agreement entered into force on 1 October 2012 and is currently in the 6th year of implementation.

The main aim of this agricultural agreement is to further liberalize trade in agricultural, processed agricultural and fishery products. Thus, this agreement provides for liberalization at the end of a transitional

period of 10 years with the exclusion of sensitive products of both Parties for which access is guaranteed with special treatment in the form of quotas with preferential treatment and/or timetables.

On the Moroccan side, sensitive products are between cereals (soft wheat and durum wheat, meats, certain fruits such as apples, some legumes such as beans and field beans).

On the European side, sensitive products are tomatoes, cucumbers, zucchini, garlic, clementine and strawberries.

Free Trade Agreement between Morocco and the United States of America:

Signed on June 15, 2004 and entered into force on January 1, 2006, the free trade agreement between Morocco and the United States of America set multiple objectives:

- The promotion of economic growth, stability of relations and cooperation between the two countries;
- The liberalization and development of trade and investment between the two countries, especially in the agricultural sector;
- Improving competitiveness and actively contributing to Morocco's development.

Specific treatment has been accorded to the agricultural sector under the agreement, which provides:

For agricultural products from the United States of America:

- A gradual dismantling of customs duties, lasting up to 25 years;
- Introduction of tariff quotas for certain highly sensitive agricultural products, given the political, economic and social stakes associated with their liberalization. This category includes: red beef, poultry meat, wheat (common wheat and durum wheat) and their primary and secondary transformation derivatives (meal and pasta).

For agricultural products from Morocco:

- A gradual dismantling of customs during a transitional period ranging from 0 to 18 years;
- Introduction of tariff quotas for certain agricultural products whose customs duties are exempt upon entry into force of the Agreement under these quotas and are progressively dismantled over

15 years without quota. These products include beef, certain dairy products, canned tomatoes and sauces, dried onions, etc.

In addition to progressive dismantling and to protect certain agricultural products, the Agreement provides for agricultural safeguard measures based on price thresholds for the USA (processed tomatoes, asparagus, canned olives, pears, apricots, peach, orange juice, etc) or volume thresholds for Morocco (chickens and turkeys, chickpeas and lentils, bitter almonds, etc.).

In addition, it is important to note that despite the liberalization of access to the US market, agricultural products must meet certain sanitary and phytosanitary requirements and fairly stringent technical standards.

In 2023, the Morocco-US Free Trade Agreement is in its 18th year of implementation.

Morocco-European Free Trade Association (EFTA) Free Trade Agreement:

The Morocco-EFTA Free Trade Agreement, including Liechtenstein, the Republic of Iceland, the Kingdom of Norway and the Swiss Confederation, was signed on 19 June 1997 and entered into force on 1 March 2000. In order to give effect to one of its aims, namely the progressive liberalization of agricultural trade bilaterally with each of the EFTA States, provisions have been introduced concerning, in particular:

- The conclusion of bilateral arrangements providing for measures facilitating such trade between Morocco and each of the EFTA countries;
- Non-discriminatory enforcement of sanitary and phytosanitary regulations and non-introduction of trade-hindering measures.

Morocco-Turkey Free Trade Agreement:

Signed on 7 April 2004 and entered into force on 1 January 2006, the Morocco-Turkey free trade agreement aims in particular at the progressive liberalization of agricultural trade in industrial products between the two countries and an exchange of tariff concessions for agricultural products with the possibility of improving the concessions granted in favor of both parties.

Thus, Turkish products benefiting from concessions granted by Morocco to Turkey are mainly dried fruits (hazelnuts, pistachios, grapes, figs, etc.), legumes (chickpeas, lentils), spices (cumin), sesame seeds, vegetable seeds and some cheeses.

Regarding the tariff concessions granted by Turkey to Morocco, this concern in particular flowers (orchids), vegetables (mushrooms, asparagus, capers, sweet corn, and cucumber) and fruits (avocados), spices, locust beans, bran, wines and canned apricots.

Agadir Agreement:

Signed on 25 February 2004 between Morocco, Tunisia, Egypt and Jordan and entered into force on 27 March 2007, the Agadir Declaration provides, *inter alia*, for the free transit of goods originating in the countries concerned through total exemption from customs duties and charges having equivalent effect with specific Pan-euro-med rules of origin.

Morocco-United Arab Emirates Free Trade Agreement:

This Agreement was signed on 25 June 2001 and entered into force on 9 July 2003. The total liberalization of agricultural, agro-industrial and fisheries trade between the two countries has been operational since 1 January 2005.

The products not benefiting from preferential arrangements are those:

- Made in free zones;
- On the list of restrictions for reasons of health, morality and safety;
- Agricultural products subject to the preference clause with the USA under the Free Trade Agreement (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 Implementing Circular No. 5080/233 of 31/12/2007 while for others the valuation rule of at least 40% applies.

Agreement on the Facilitation and Development of Trade between Arab Countries (Arab League):

Free Trade Agreement signed on 27 February 1981 between the Arab countries, entered into force on 1 January 1998.

The agreement provides for total exemption from import duty into Morocco and charges having equivalent effect for all agricultural products from 01/01/2005.

Products not benefiting from the preferential regime are those subject to the exclusion list for reasons of health, morality and safety.

The rules of origin adopted are either specific or of at least 40% depending on the case of the products (the specific rules are the subject of Implementing Circular No. 5080/233 of 31/12/2007). For the rest of agricultural products, negotiations are being finalized within the framework of the Arab League.

EXPORT PROCEDURES

Terms of export:

The exercise of the export activity requires registration in the Trade Register (RC). This registration is made with the court of first instance of the place of location of the main establishment of the merchant or the registered office of the Company. The analytical number of the commercial register must be entered on the export permits.

a. Free goods for export

All products are free for export with the exception of products, which are subject to export license in accordance with the provisions of the Order of the Minister of Foreign Trade, Foreign Investment and Handicrafts (No. 1308-94 of 19 April 1994 as amended and supplemented). For free goods for export, the operator draws up a Foreign Exchange Commitment in 3 copies on the form entitled "Foreign Exchange Commitment, Export License".

b. Exemption from the exchange commitment

The Exchange Undertaking shall be presented directly to the customs office at the time of exportation of the goods accompanied by a pro forma invoice in duplicate comprising:

- The total value and the unit price expressed as ex-works, FOB (Free On Board), FAS (Free Alongside Ship) ou FCA (Free Carrier);
- The quantity expressed in units of adequate measurement;
- The commercial description of the goods;

- Payment terms.

c. Goods subject to export license

For products subject to an export license, the latter must be drawn up in 6 copies on the form entitled "Exchange commitment, Export license" and accompanied by two copies of a pro forma invoice specifying:

- The total value and the unit price expressed as ex-works, FOB, FAS or FCA;
- The quantity expressed in units of adequate measurement;
- The commercial description of the goods;
- Payment terms.

The Export License is deposited with the Department of Foreign Trade, against receipt and transmitted for opinion to the Ministry concerned. The latter keeps one copy and submits the other copies to the Department of Foreign Trade for approval.

After approval, the Department of Foreign Trade keeps one copy, returns one copy to the exporter and sends two copies to the customs office concerned.

Upon charge, a copy of the export license shall be sent to the Exchange Office by the customs office concerned.

The decision to grant or refuse the export license shall be notified to the applicant by the Department of Foreign Trade within a period not exceeding 30 days from the date of its deposit. Reasons must be given for any rejection of the application for an export license.

The export license is valid for 3 months; this period begins to run from the date of the visa of the Department of Foreign Trade.

d. Export exchange regulations

d.1. Tolerances

The export of goods must give rise to the subscription of export certificates, however, are exempt from the subscription of the exchange commitment, exports:

- Goods with a value equal to or less than 10,000.00 MAD made without commercial value and without payment;
- "Non-payment" samples whose value is equal to or less than MAD 20,000.00;
- Goods sent on a temporary basis under one of the customs economic regimes (temporary export for outward transformation, temporary export, etc.);
- Goods of Moroccan origin, exported by a foreign tourist for his own account, at the end of his stay in Morocco. When the value of these goods exceeds MAD 10,000, the tourist concerned remains required to justify to the customs services of the borders the payment in Morocco of these goods in foreign currency or dirhams from the transfer of currency and justified by any appropriate means: exchange slips, invoices in case of use of international credit cards or any other means of payment;
- Goods acquired and paid for in Morocco by a foreign tourist whose value is less than or equal to 50,000.00 MAD, shipped by the trader, the Moroccan freight forwarder or any other person on behalf of said tourist. In this case, the responsibility for justifying the foreign currency settlement of the export rests with the sender.

d.2. Repatriation of export earnings:

The exporter is required to collect and repatriate to Morocco the full proceeds of his export within a maximum period of 150 days from the date of shipment of the goods (Circular of the Exchange Office No. 1606 of 21 September 1993). This period may be extended to:

- 180 days from the date of customs charging in the case of consignment sales abroad;
- Up to 8 years in the case of export credits granted to foreign customers in accordance with the provisions of this Instruction. Repatriations must take place in accordance with the repayment deadlines provided for in the credit agreements.

Any postponement of the deadline for the repatriation of the product of an export or a reduction in value of this product, for any reason whatsoever, must be the subject of a request for prior authorization to be submitted to the Exchange Office before the expiry of the 150-day period. In order to enable the Exchange Office to discharge these exports, the exporter must send periodic reports to the Board of Exchanges

accompanied by supporting documents. For exports of services, the maximum period for repatriation is 30 days from the due date of payment for the provision of services.

e. Customs declaration of goods:

The export of goods is subject to presentation to the customs office, in addition to the export document, of a customs declaration on the form "Single Declaration of Goods" (DUM).

f. Preferential regimes:

In order to benefit from the preferences provided for in bilateral or multilateral agreements and conventions, exports under this framework must comply with the origin criteria. Certificates of origin attesting compliance with these criteria are drawn up on forms endorsed by the Customs Administration.

In general, a product is deemed to originate in Morocco when it is entirely produced or manufactured in Morocco or if it has received sufficient transformation or working. The origin criteria are defined in detail by bilateral or multilateral agreements and conventions.

The Certificate of Origin is required for exports made under the following framework:

- Exports under bilateral trade and tariff agreements and free trade agreements must be covered by the certificate of origin;
- Similarly, exports to certain French-speaking countries are covered by a "pink" certificate of origin or any other document in lieu duly stamped by the customs administration;
- Exports to the European Union must be covered by the "EUR 1" movement certificate or the "EUR-MED" certificate of origin under the pan-Euro med cumulating rules;
- Exports under the Generalized System of Preferences (GSP) must be accompanied by Form "APR" for shipments by post or Certificate of Origin "Form A" for other modes of shipment. "Form A" is not required for exports to the United States of America. A declaration is made out by the exporter and submitted only at the request of the District Collector Custom.

g. Technical export control of fresh or processed animal and vegetable products

Technical export control was introduced under the Dahir of 1 September 1944. For fresh or processed animal and vegetable products, this control has been entrusted to MOROCCO FOODEX – EACCE – The Autonomous Establishment for Export Control and Coordination, under Dahir No. 1-88-240 of 28 May 1993 promulgating Law No. 31-86 establishing the EACCE (B. O. n° 4210 of 7 July 1993).

The EACCE (currently Morocco Foodex) is a public body created in 1986 which took over the attributions devolved to the ECO by the Dahir of 1 September 1944 on technical control, the viziriel decree of 1 September 1944 relating to the application of the technical control of manufacturing, packaging and export and the decree of 13 July 1948, relating to the approval of factories and manufacturing workshops, packaging or storage of food products. The following products are subject to ECCCE control:

- Fresh or processed fruits and vegetables;
- Fresh or processed fishery products;
- Wines and wine products;
- Cereals, legumes, dried fruits and herbal products;
- Exporters of the above products must be registered in the EACCE.

g.1. Approval of establishments

Any establishment that manufactures processes or packages food products for export must be registered by Morocco Foodex. Approval is made effective by entry in the ECCCE register, which assigns the establishment an approval number. For the purpose of monitoring the control, entries in the register shall be renewable annually.

g.2. Product control

The first check of an administrative nature concerns the certificates of inspection to ensure that the lot to be examined has not been classified or rejected during a previous inspection. The product shall be checked on a representative sample of the batch chosen for examination. The control is sanctioned by a certificate of control containing all the information defining the product, the stakeholders and the export circuit.

ICUSTOMS FORMALITIES:

a. Customs clearance of goods

After payment of the control formalities (sanitary, phytosanitary, etc.) and transport formalities, depending on the mode of transport chosen (air, sea or TIR), and after obtaining the certificate of origin and subscribing to an export document, the exporter or his representative constitutes an export file including the following documents for simple exports:

- Single Goods Declaration (DUM);
- Commercial invoice;
- Packing note;
- Export title;
- Ticket;
- Certificate of origin;
- Certificate of control according to the nature of the products.

The customs clearance and loading of the goods requires:

- Registration and filing of the DUM by computer means;
- The physical deposit of the DUM and documents constituting the export file;
- Verification of the declaration;
- The scheduling of the visit of the goods if necessary;
- The issuance of the voucher to be charged for the loading of the goods;
- Handling invoicing;
- The issuance of the invoice in lieu of the voucher to be embarked.

b. Customs charge:

Customs charging is the act by which the customs service's record that the exported goods have passed through customs. It consists of affixing the following information on the export document:

- The designation of the customs office;
- The signing of the person in charge of the customs office of exit of the goods;
- The number and date of the single declaration of goods;
- The date of the allocation the quantity and value of the exported goods.

As soon as it is charged, a copy of the export document shall be sent to the Exchange Office by the customs office concerned.

5.3 IMPORT MARKET

The import market consists of the following main food products, the value of which is expressed (in millions of dollars):

	2017	2018	2019	2020	2021
Grain	1404	1546	1610	2281	2389
Animal or vegetable fats and oils	630	618	556	579	889
Sugars and sugar	534	401	441	499	700
Cotton	531	506	484	400	588

The main features of the applicable procedure are as follows:

Import procedures:

Any import operation requires registration in the commercial register. This registration is made with the Court of First Instance of the place of location of the main establishment of the trader.

a. Import procedure

a.1. Goods free on importation

All goods are free to import, except for powders, explosives, retreaded tires, ozone-depleting substances and equipment using these substances... for which restrictions exist. To carry out an import, the operator subscribes to an Import Undertaking on the form entitled "Import Commitment, Import License, and Prior Import Declaration".

The import undertaking must be domiciled with a bank chosen by the importer. The commitment is drawn up in 5 copies and accompanied by a preformat invoice in 5 copies.

Prior approval from the Ministry of Foreign Trade is required for import commitments made by natural or legal persons not registered in the commercial register, as well as by those not registered in the register of foreign trade operators and carrying out import operations of a non-commercial nature or for professional use.

Import transactions without payment (non-commercial donations, goods giving rise to payments by assets legally constituted abroad, replacement under the guarantee, etc.) are exempt from the obligation to import.

a.2. Goods Subject to Import Licensing

Only powders and explosives retreaded or used tires, thrift stores, ozone-depleting substances and equipment using these substances is subject to import licensing.

The import license is deposited, against receipt, with the Ministry responsible for foreign trade. It is issued by this department, after consulting the ministry concerned.

The import license is valid for a maximum of 6 months. This period begins to run from the date of the visa of the Ministry of Foreign Trade. The import license allows customs clearance and financial settlement of the goods.

Note: All invoices and Preformat invoices must include the following specifications:

- The unit price expressed in value;
- The quantity expressed in units of adequate measures;
- The commercial description of the goods.

a.3. Goods subject to the Prior Import Declaration

Imports of goods which cause or threaten to cause serious injury to domestic production (massive imports, imports of products subsidized by exporting countries or imported at dumped prices) are subject to the Prior Import Declaration at the dumped price. The Prior Import Declaration is drawn up in 6 copies on the form "Import commitment, import license, prior import declaration" accompanied by a preformat invoice in 5 copies. The period of validity of the Prior Import Declaration is 3 months.

a.4. Goods subject to the Application for Relief from Customs Duty (DFD)

The DFD is required for the importation of free import goods, admitted free of customs duties, under trade and tariff agreements concluded between Morocco and certain countries.

The Application for Duty-Free Relief is submitted to the Ministry of Industry and Trade – Directorate of Foreign Trade Policy (Import Division) by importers wishing to benefit from customs relief. It is issued by this department after consulting the Ministry concerned.

The application is drawn up in 4 copies on the form entitled "Application for Relief from Customs" and accompanied by a preformat invoice in 3 copies.

The validity period of this request is a maximum of 6 months.

a.5. Single declaration of goods

The customs declaration of goods is made on the form entitled "Single Goods Declaration" – DUM. This declaration must be accompanied by the invoice, the import document and, where appropriate, any other documents required depending on the nature of the products.

This declaration must be made within a maximum period of 60 days, from the arrival of the goods. The goods, which have not been the subject of this detailed declaration, are considered abandoned in customs. Goods for which a detailed declaration has been lodged but which have not been removed within 3 months from the date of registration of the declaration shall also be considered abandoned in customs. The same applies to goods for which duties and taxes have not been paid or guaranteed.

b. Import Control

b.1. Import quality control

Quality control has been instituted for the import of industrial products whose standards are made mandatory in accordance with the provisions of laws and texts relating to standardization. The import and removal of this type of industrial product is subject to the presentation of a certificate or certificate of conformity to standards, issued by the Ministry of Industry. However, operators who obtain their supplies from the same suppliers are authorized to import those products without checking compliance with the mandatory standards. The exemption is obtained by the presentation of a document entitled "authorization for the admission of products exempt from the control of conformity with standards made mandatory application" issued by the Ministry of Industry and whose validity is fixed for one year. In the event of a change of suppliers, the submission of the above-mentioned documents of conformity or authorization is required. The certificate of conformity is the subject of a request sent by the operator to the Ministry of Industry notifying it of each arrival of the products concerned at the customs offices. In the case of sampling, a sampling report shall be drawn up accordingly. These samples are transmitted by the services of the Ministry of Industry to the laboratory concerned to carry out the necessary tests. If the industrial products concerned conform, the certificate of conformity, a copy of which shall be sent to the importing office, shall be issued to the operator. In the event of non-compliance, the results of the tests are notified by the services of the Ministry of Industry to the customs service and to the importer. In case of dispute, the latter has a period of 8 days to request a second analysis on the same sample. If, on expiry of the eight-day period, the second test has not been requested or if the results of the second test are consistent with the results of the first tests, the product in question must be re-exported. In the event of refusal to re-export, the provisions of Law No. 13.83 on the repression of fraud on goods remain applicable. Where the second analysis invalidates the results of the first tests, a certificate of conformity shall be issued to the operator.

b.2. Veterinary and phytosanitary control

- Veterinary health control

The importation of live animals, animal foodstuffs, products of animal origin, animal propagating products and fresh water and seafood shall be subject, at the operator's expense, to health and quality inspection. Such animals and products shall be prohibited for import where the country of origin or provenance is not recognized as free from contagious diseases. Animals are subject to the quarantine regime. For products of animal origin, the inspection consists of one or more of the following operations, depending on the research envisaged:

- Document review;
- Physical control of the product;
- Sampling for analysis.

In the light of the results of the inspection, a health certificate is issued to the importer, which shall result in either the admission or rejection of the product concerned. Products and foodstuffs recognized as unfit for human or animal consumption may, at the choice of the importer, be either destroyed or incinerated.

- Phytosanitary control:

The import of plants and plant products is subject to systematic and compulsory phytosanitary control. The import of these products or some of them, from specific countries or regions may be prohibited. Dried plants are, however, exempt from phytosanitary control. The services concerned may order:

- Either the disinfection or fumigation of plant products;
- Either the repulsion or destruction of these products.

The import of these products is authorized by the customs service's only after production of a phytosanitary inspection certificate issued by the plant protection service.







APPENDICES







ANNEX1

PROGRAM CONTRACTS OF AGRICULTURAL PRODUCTION SECTORS

Citrus sector	
Baseline 2020	
<ul style="list-style-type: none">• The area covered is 130,000 ha;• Average production (2017-2020) of 2,224,000 t per year;• Average exports (2017-2020) of citrus fruits are around 627,300 T for a value of 5 billion dirhams per year;• The sector provides more than 17 million working days per year at the orchard level;• Challenges related to the development of the downstream value chain, including packaging, transformation and commercialization.	
2030 goals	
<ul style="list-style-type: none">• Stabilize the current citrus-growing area, capping it at 130,000 hectares;• Renew old plantations covering 22,500 hectares;• Enhance production to reach 3,340,000 tons, particularly through increased yields;• Improve the packaging rate to reach 66% compared to 33% in 2020;• Enhance the processing rate to reach 10% compared to 2% in 2020;• Promote exports to reach 1,000,000 tons compared to 630,000 tons in 2020.	
Investments	
Total investment: MAD 5.61 billion including MAD 2.84 billion as a contribution from the State	
Data on the signed program contract	
Period covered: 2021 - 2030.	
Signatory Parties:	
<ul style="list-style-type: none">• Government :<ul style="list-style-type: none">- The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;- The Minister of the Interior;- The Minister of Economy and Finance;- The Minister of Industry and Trade.• Profession: Moroccan Inter professional Federation of Citrus "Maroc-Citrus"	

Olive sector
Baseline 2020
<ul style="list-style-type: none"> • A planted area of about 1,117,000 ha which represents more than 65% of the national arboreal area; • An average production of 1.7 million T with an average productivity of 1.5 T/ha; • Industrial production of table olives for 200,000 T and a production of olive oil and olive-pomace oil of 150,000 T; • An important source of employment providing more than 200,000 permanent jobs; • A coverage of 19% of the country's needs for edible oils; • Average exports of olive oil including olive-pomace oil and table olives are respectively of the order of 32,000 T/year and 83,000 T/year; • Challenges related to the development of the downstream of the value chain, including the production of quality olive and table olive oil, packaging and commercializing. On the local market of quality and packaged olive products.
2030 Goals
<ul style="list-style-type: none"> • The extension of the area to reach 1.4 million ha in 2030; • Improving production to reach 3.5 million T in 2030; • The improvement of industrial production of table olives to reach 270,000 T in 2030; • The promotion of olive oil exports including olive-pomace oil and table olives to reach 100,000 T and 150,000 T respectively in 2030.
Investments
<p>Total investment: MAD 16.9 billion including MAD 8.3 billion as a contribution from the State</p>
Data on the signed program contract
<p>Period covered: 2021 - 2030.</p> <p>Signatory Parties:</p> <ul style="list-style-type: none"> • Government : <ul style="list-style-type: none"> - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests; - The Minister of the Interior; - The Minister of Economy and Finance; - The Minister of Industry and Trade; - The Minister of Energy Transition and Sustainable Development. • Profession: Moroccan Olive Inter profession (Inter prolife).

Vegetable grower sector

Situation de référence 2020

- An area of 251,000 ha;
- Production of about 7.4 million T divided into three sub-sectors: seasonal vegetable crops (5.4 million T), early crops (2 million T) and crops for agro-industry (110,000 T);
- Nearly 60 million working days (50 million in production and 10 million in packaging);
- Challenges related to the development of the downstream value chain, including packaging and transformation.

2030 Goals

- A market garden area of 308,000 ha including 20,200 ha under glass;
- A production of 11.4 million T;
- An export volume of 2.5 million T compared to 1.2 MT with market diversification;
- A conditioning rate of 35% against 25%;
- A conversion rate of 10% against 5%;
- A cold storage rate of 15% vs. 10%.

Investments

Total investment: MAD 8.42 billion, including MAD 3.27 billion as a contribution from the State

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government:
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: Moroccan Inter professional Federation for the Production and Export of Fruits and Vegetables (FIFEL).

Seed sector
Baseline 2020
<ul style="list-style-type: none"> • Tripling of annual availability, which currently stands at around 2M qx per year; • Doubling of average sales between 2008 and 2019: 700,000 to 1,170,000 QX with a record of 1.67 Qx Miles in 2017; • A strategic sector for the upgrading of the agricultural sector through its strategic role in improving productivity and quality for all crop and animal production sectors.
2030 Goals
<ul style="list-style-type: none"> • Enrichment and renewal of the varietal profile to reach 5,750 varieties; • Securing the availability of certified seeds through the orientation of the seed multiplication program to irrigated areas to reach 100% for seed starters and 50% for certified cereal seeds; • The maintenance of an annual safety stock of cereal seeds at around 30% of availability to reach 700 Thousand Qx; • The diversification of the seed supply through the implementation of national certified seed production programs to achieve: <ul style="list-style-type: none"> - 2.5 million Qx for autumn cereal seeds; - 50 miles Qx for seeds of food and fodder legumes; - 10 thousand Tons for potato seeds. • Modernization of cereal seed industrialization capacity to reach 3 million Qx; • Strengthening cereal seed storage capacities to reach 3 million Qx; • Strengthening the storage capacity of potato fridges to reach 70 thousand T; • Expansion of the private seed distribution network to 2,200 points of sale; • Improving the utilization rates of certified seed to achieve: <ul style="list-style-type: none"> - 40% for certified cereal seed; - 15% for certified seed of edible legumes and fodder; - 40% for certified seed of potatoes; - 60% for standard seeds.
Investments
<p>Total investment: MAD 3.03 billion including MAD 2.81 billion as a contribution from the State.</p>
Data on the signed program contract
<p>Period covered: 2021 - 2030.</p> <p>Signatory Parties:</p> <ul style="list-style-type: none"> • Government: <ul style="list-style-type: none"> - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests; - The Minister of Economy and Finance; • Profession: National Interprofessional Federation of Seeds and Plants (FNIS).

Arboreal sector
Baseline 2020
<ul style="list-style-type: none"> • The tree area is 376,800 ha; • Total production is 1.7 million tons; • The sector provides 29.3 million working days upstream.
2030 Goals
<ul style="list-style-type: none"> • Extend the areas of ecologically resistant and economically promising arboreal species to reach a fruit tree area of 722,049 ha; • Renew aging orchards with the introduction of improved fruit varieties that meet market requirements; • Achieve fruit production of 3.8 million T; • Export a tonnage of 100,000 T; • Achieve a cold storage rate of 50% compared to 17%; • Achieve a conditioning rate of 30% against 10%; • Achieve a conversion rate of 30% versus 18%.
Investments
Total investment: MAD 13.77 billion, including MAD 6.63 billion as a contribution from the State
Program contract data
<p>Period covered: 2021 - 2030.</p> <p>Signatory Parties:</p> <ul style="list-style-type: none"> • Government: <ul style="list-style-type: none"> - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests; - The Minister of the Interior; - The Minister of Economy and Finance; - The Minister of Industry and Trade. • Profession: Inter professional Federation of the Fruit Arboriculture Sector in Morocco (FEDAM).

Saffron sector

Baseline 2020

- The area of saffron extends over 1,944 ha;
- Average production is 6.2 t/year;
- The average quantity exported is 235 Kg.

2030 Goals

- Increase the area reserved for saffron cultivation to 3,000 ha;
- Improve saffron production to reach 13.5 t/year;
- Increase packaged quantities to 70% instead of 55%;
- Increase the quantities exported to 1 t/year.

Investments

Total investment: 297 MMAD, including 247.1 MMAD as a contribution from the State.

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: Moroccan Inter professional Federation of the Saffron Sector (FIMASAFRAN).

Argan sector

Baseline 2020

- The argan grove covers an area of more than 830,000 ha of forest land;
- The argan tree is the second largest forest species in the country with a production of 5,300 T of argan oil;
- 164,470 ha rehabilitated;
- 2,160 ha of agricultural argan tree.

2030 Goals

- Continue the rehabilitation of the argan grove to reach an area of 411,000 ha;
- Plant agricultural argan trees to reach an area of 50,000 Ha, including 48,000 ha as part of solidarity agriculture;
- Improve argan oil production to 10,000 T;
- Improve the conditioning rate of argan oil to 50% compared to 20% in 2020.

Investments

Total investment: MAD 3.64 billion, including MAD 3.51 billion as a contribution from the State.

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government:
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade;
 - The Ministry of Energy Transition and Sustainable Development.
- Profession: Inter professional Federation of the argan Sector (FIF ARGANE).

Red fruits sector

Baseline 2020

- The area of red fruits is 9,350 ha, including strawberry: 3,100 ha, raspberry: 3,100 ha and blueberry: 3,000 ha;
- The average global production of red fruits is 230,000 T;
- Exports of red fruits are of the order of 183,000 T, including 98,000 T fresh and 87,000 T frozen, for a value of 6 billion dirhams per year;
- The sector provides more than 16 million working days, including 10 million at the farm level and 6 million at the packaging and freezing unit level.

2030 Goals

- Increase the area of red fruits to 13,550 ha, taking into account the water availability of the regions concerned;
- Improve production to reach 360,000 T;
- Increase the export volumes of red fruits to eventually reach 230,000 T, including 128,000 T fresh and 102,000 T frozen;
- Improve the rate of valorization of production.

Investments

Total investment: MAD 2.31 billion, including MAD 435 million as a contribution from the State.

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: Moroccan Inter professional Federation of Red Fruits (Inter proberries Morocco).

Perfume rose sector

Baseline 2020

- The area of the perfume rose is 950 ha;
- The overall production of fresh roses is 3,606 T;
- The quantities processed are estimated at 1,000 T/year of fresh roses treated by 25 transformation units;
- The perfume rose is of economic, social and environmental importance in the Draa Tafilalet region;
- The perfume rose of Morocco is recognized nationally and internationally for its water, essential oil, concrete and all its derived products;
- Challenges related to improving the quality of perfume rose products and combating counterfeiting.

2030 goals

- Extension of the area of the perfume rose to 1,200 ha and rehabilitation of 150 ha;
- Improvement of production to reach 6,000 T;
- Improved packaging rate to 70% compared to 33% in 2020;
- Improved conversion rate to 56% compared to 18% in 2020;
- Export promotion to reach 150 T compared to 87 T in 2020.

Investments

Total investment: MAD 169 million including MAD 156 million as a contribution from the State

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- The Credit Agricole Group of Morocco;
- Profession: Moroccan Inter professional Federation of Perfume Rose (FIMAROSE).

Sugar sector

Baseline 2016-2020

- The average area over the past five years for sugar crops is 64,544 hectares, including Sugar Beet: 55,920 Ha and Sugarcane: 8,624 Ha.
- The average production over the past five years for sugar crops is 4.4 million tons (MT), comprising Sugar Beet: 3.8 MT and Sugarcane: 0.6 MT.
- Sugar production amounts to 560,000 tons.
- The sugar industry provides approximately 10 million seasonal workdays per year.
- Approximately 80,000 farmers are involved in sugar crop cultivation.
- The sugar industry consists of 7 mills and a refinery owned by the COSUMAR group.

2030 goals

- Increase the area of sugar crops to reach 85,000 hectares, including 68,000 hectares of sugar beet and 17,000 hectares of sugarcane, an additional area of 20,500 hectares.
- Enhance the sugar yield per hectare to 12T/ha for sugar beet and 10T/ha for sugarcane. Improve white sugar production to reach 753,000 tons, achieving a coverage rate of 60%.
- Enhance processing capacity, increasing from the current 4.4 million tons per year to 4.7 million tons per year.
- Improve refining capacity, increasing from the current 1.25 million tons per year to 1.50 million tons per year.

Investments

Total investment: MAD 5,7 billion including MAD 3.8 billion as a contribution from the State.

Data on the signed program contract

Period covered: 2021 – 2030.

Signatory Parties:

- Government:
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: The Moroccan Interprofessional Federation of Sugar FIMASUCRE.

Oilseed sector

Baseline 2016-2020

- The average area for oilseeds is approximately 27,600 hectares, comprising 19,000 hectares of sunflower and 8,600 hectares of rapeseed.
- The overall average production amounts to about 34,500 tons.
- The total crushing capacity is 700,000 tons, managed by two operators: Lesieur Cristal and Huileries Belhassan.

2030 goals

- Expand the oilseed crop area to reach 250,000 hectares.
- Diversify the oilseed varieties: 120,000 hectares of sunflower, 80,000 hectares of rapeseed, and 50,000 hectares of soybeans.
- Improve production to reach 360,000 tonnes.
- Enhance the coverage rate of needs to reach 25%.
- Strengthen oilseed seed storage capacity to reach 100,000 tons.

Investments

Total investment: MAD 1.29 billion, including MAD 823,1 million as a state contribution

Program contract data

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: Inter professional Federation of Oilseeds (FOLEA).

Rice sector

Baseline 2020

- The area covers 8,810 hectares.
- Production amounts to 65,675 tons.
- The capacity for packaging white rice is 118,800 tons per year.
- Rice storage capacity is 65,000 tons.

2030 goals

- Increase the rice-growing area to reach 10,800 hectares.
- Improve production to reach 95,200 tons.
- Increase the capacity for packaging white rice to reach 125,000 tons per year.
- Increase rice storage capacity to reach 125,000 tons.

Investments

Total investment: 339.3 million Dhs, including 174.4 million Dhs as a contribution from the State.

Program contract data

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- The Credit Agricole Group of Morocco;
- Profession: National Inter professional Federation of the Rice Sector (FNIR).

Cereals and Legumes Sector

Baseline2020

- A sector that represents 10-20% of agricultural GDP;
- A predominant sector for almost all farms;
- An average area of 4.4 Mha, an average production of 64 MQx;
- A stabilization of the average coverage rate of national cereal needs at around 70% during the last agricultural seasons;
- An area subscribed to the multi-risk climate insurance of 1 Mha;
- A strong dependence with climatic conditions.

2030 goals

- The improvement in the rate of use of certified seeds to reach 40% against 19% in 2020 for cereals and 15% against 2% in 2020 for legumes;
- The balance of cereal/legume rotation over an area of 5 million ha;
- Increasing cereal production to QX 95 million and pulses to QX 6.5 million;
- The extension of the area insured against climatic hazards to reach 2.2 million ha against 1 million ha in 2020;
- The establishment of a strategic safety stock of cereals and legumes;
- The establishment of local storage capacities;
- Improving the rate of incorporation of national wheat in flour production to 50% and 10% respectively for common wheat and durum wheat;
- Improving the utilization rate of national durum wheat semolina in pasta and couscous production to 10%.

Investments

Total investment: 7.3 billion Dhs including 6.2 billion Dhs as contribution of the State.

Program contract data

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- The Credit Agricole Group of Morocco;
- Profession: The Inter professional Federation of Cereals and Legumes Activities (FIAC).

Phoenicicultural sector

Baseline 2020

- The increase in the area of date palm by 25% from 48.000 ha in 2010 to 60.000 ha in 2020 through the planting of 3,1 million plants of which 2 million plants concern traditional palm groves and 1.1 million plants for modern palm groves
- The improvement in date production by 66%, from 9000 T in 2010 to 149000 T in 2022
- Cleaning of 1,8 million tufts at the end of 2022;
- Strengthening of the recovery infrastructure through the creation and equipment of 50 recovery units for an overall production, capacity of 27,00 T/ year and storage capacity of 6000 T/year
- Significant increase in exports to reach 3600 T in 2020

2030 Goals

- The planting of 5 million plants includes 3 million plants at the level of the traditional palm grove;
- The extension of the area outside the traditional palm grove of 14,00 ha to reach 21,00 ha to through the planting of 2 million vitro plants;
- The improvement of production to reach 300,000 T.

Investments

Total investment: MAD 7.47 billion, including MAD 3,87 million as a contribution from the State.

Data on the signed program contract

Period covered: 2021 - 2030.

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
- Profession: Moroccan Interprofessional Federation of Red Fruits (Inter proberries Morocco).

Organic sector

Baseline

- Area cultivated under the 2021 campaign: 19,000 ha and a production of 103,000 T;
- Area of spontaneous plantations: nearly 272,000 ha, represented mainly by aromatic and medicinal plants (143,000 ha), argan forest (103,000 ha) and cedar (10,000 ha);
- Exports: 20 100 T including 8 000 T of fresh products and 12 100 T of processed products.

Goals

- Reach a total area of 100,000 ha for a crop production of 600,000 T (including 114,000 T for export);
- Create 20 million working days;
- Increase the consumption of organic products at the national market level.

Investments

Total investment: MAD 1.5 billion, including MAD 0.75 billion as a contribution from the State.

Data on the signed program contract

Period covered: 2022 – 2030

Signatory Parties:

- Government :
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade;
 - The Ministry of Energy Transition and Sustainable Development.
- The Credit Agricole Group of Morocco;
- The profession: The inter professional federation of the organic sector "Maroc BIO"

Milk sector	
Baseline	
<ul style="list-style-type: none"> • A national milk production that increased from 2.10 billion liters in 2010 to 2.50 billion liters in 2020; • A sector that generates 49.5 MJT; • A productivity per cow per year of nearly: 4200 kg for pure breeds, 2300 kg for crossbreeds and 600 kg for local breeds 	
Goals	
<ul style="list-style-type: none"> • The production of 3.5 billion liters of milk by 2030; • Improving the conditions of access of milk and dairy products to consumers to reach 90 liter equivalent per capita per year in 2030; • The increase in productivity per cow per year to 5500 liters for the pure breed, 3500 liters for the cross breed and 700 for the local breed; • Reduce peddling to 10% compared to 30% in 2020; • Creation of 70,000 new jobs. 	
Investments	
Investment cost: 12.13 billion MAD, including 3.31 billion MAD from the government contribution.	
Data on the signed program contract	
<p>Period covered: 2022-2030.</p> <p>Signataires :</p> <ul style="list-style-type: none"> • The Inter professional Milk Federation (MOROCLAIT) • Government of the Kingdom of Morocco: <ul style="list-style-type: none"> - The Minister of Economy and Finance; - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests; - The Minister of Industry and Trade; - The Credit Agricole Group of Morocco; 	

Poultry sector	
Baseline	
<ul style="list-style-type: none"> Production of 782,000 tonnes of white meat; Production of 6.9 billion table eggs; An estimated consumption of white meat at 22.1 kg/inhabitant/year and eggs at 195 units/inhabitant/year; Investments of 13.5 billion Dhs with a turnover of 32.5 billion Dhs; Creation of 530,000 jobs, including 160,000 direct jobs and 370,000 indirect jobs in distribution and marketing channels. 	
2030 Goals	
<ul style="list-style-type: none"> A production of 912 000 tons of poultry meat; A production of 7.6 billion units of table eggs; Generalization of social security coverage to 80,000 people in the poultry sector; Creation of 70,000 new jobs to reach 600,000 jobs in 2030; Improvement of distribution channels to reach 90% of controlled white meat from poultry slaughterhouses and approved local slaughter units. 	
Investments	
Investment cost: 2.02 billion Dhs, of which 0.62 billion Dhs contribution from the State	
Data on the signed program contract	

Period covered: 2022-2030.

Signatories:

- THE INTERPROFESSIONAL FEDERATION OF THE POULTRY SECTOR -FISA
- Government of the Kingdom of Morocco:
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Industry and Trade.
 - The Minister of Energy Transition and Sustainable Development
- CREDIT AGRICOLE GROUP OF MOROCCO

Red meat sector	
Baseline (2020)	
• Meat production (kt/year)	540
• Average carcass weight of bovine animals (kg)	245
• Average carcass weight of sheep (kg)	16
• Slaughterhouses to standards	6
2030 Goals	
• Meat production (kt/year)	850
• Average carcass weight of cattle (kg)	270
• Average carcass weight of sheep (kg)	20
• Slaughterhouses to standards	120
Investments	
Investment cost: 14.45 billion Dhs, of which 7.75 billion Dhs contribution from the State.	
Data on the signed program contract	

Period covered: 2022–2030.

Signatories:

- THE INTERPROFESSIONAL FEDERATION OF RED MEAT "FIVIAR"
- Government of the Kingdom of Morocco:
 - The Minister of the Interior;
 - The Minister of Economy and Finance;
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of Industry and Trade;

Beekeeping sector

Baseline (2020)

- Production of 7,960 tons of honey;
- Number of modern hives: 640,000 hives;
- Number of beekeepers: 36,000 beekeepers;
- Productivity: 12 kg/hive/year;
- a consumption of 250 g/inhabitant/year;
- Investments valued at 574.6 million dirhams;
- A turnover of 1.1 billion dhs;
- Creation of 2.45 million direct jobs.

2030 goals

- Production of 16,000 tons of honey;
- Increase in the number of modern hives to 1,000,000 hives;
- Increased hive productivity to 16kg honey/hive / year.

Investments

Total investment: 1.595 billion dirhams, including 0.51 million dirhams contribution from the State

Data on the signed program contract

Period covered: 2022 - 2030.

Signatories:

- **Moroccan Inter professional Federation of Beekeeping: FIMAP**
- **Government of the Kingdom of Morocco:**
 - The Minister of Agriculture, Fisheries, Rural Development and Water and Forests;
 - The Minister of the Interior;
 - The Minister of Economy and Finance.



ANNEX 2



LIST OF THE 80 SDOQ RECOGNIZED UNTIL 2023

Year of recognition	Number of the SDOQ recognized	Name of the product
2009	2	The PGI " argan "
		The PDO « Tyout Olive Oil - Chiadma
2010	4	The PGI "Clementine of Berkane"
		The PDO "Saffron of Taliouine"
		The PGI "Dattes Majhoul de Tafilalet"
		The Agricultural Label "Lamb Brass"
2011	5	The PGI "Lamb meat Béni Guil"
		The PGI " Pomegranate Sefri Ouled Abdellah"
		The PGI " Goat cheese Chefchaouen"
		The PGI "Fig of Barbary of Aït Baâmrane" Souss-Massa and Guelmim-Oued Noun
2012	4	The PDO "Rose of Kelâat M'Gouna-Dades"
		The PGI "Dates Aziza of Figuig"
		The PGI "Almond of Tafraout"
		The PGI "Boufeggous Dates"
2013	6	The PGI "Tadla-Azilal Euphorbia Honey"
		The PGI "Apple of Midelt"
		The PGI "Ouezzane Extra Virgin Olive Oil"
		The PGI " Strawberry tree honey Jbal My Abdessalam"
		The PGI "Bouittob dates from Tata"
		The PGI "Nequats of Zegzel"
		The PGI "Keskes Khoumassi"

Year of recognition	Number of the SDOQ recognized	Name of the product
2014	8	The PGI "Capers da Safi"
		The PDO "Lavandin of Oulmès Essential Oil"
		The PDO "Ghmat Aylane Extra Virgin Olive Oil"
		The PGI "Raisin Doukkali"
		The PGI " Nut of Azillal"
		The PGI "Jihel Dates of Draa "
		The Agricultural Label "Najda Dates"
		The PGI "Almond of Rif"
2015	9	The PGI "Henné of Ait Ouabelli"
		The PGI "Olive Oil Outat El Haj"
		The PGI " dried fig"
		Nabout ofTaounate"
		The PGI "Tafersite Olive Oil"
		The PGI "Sahara Euphorbia Honey"
		The PGI "Zaer's lentil"
		The PGI "Coing Oued El Maleh"
		The PGI "Essential Oil of Rosemary of the Oriental"

Year of recognition	Number of the SDOQ recognized	Name of the product
2016	8	The PGI "Henné Foum Zguid"
		PGI "Cumin Beldi of Rhamna"
		The PGI "Dellahia Prickly Pear"
		The PGI "Amande d'Aknoul"
		PGI "Amandes d'Amellago"
		PGI "Olive oil of Sefrou"
		The PGI "Camel milk from the Sahara"
		The Agricultural Label "Al Alfiya Olive Oil"
2017	7	PGI "Thyme Honey from Souss-Massa"
		PGI "Zerhoune olive oil"
		The PGI "Outoukdjm dates of Toudgha Tinghir"
		Honey of zendaz from the Bouiblane Massif »
		The PGI "Ait Attab Olive Oil"
		The agricultural label "free-range chicken"
		The Agricultural Label "Camel Cheese from the Sahara"
2018	9	PGI "Rosemary honey from the Oriental"
		PGI "Spurge Honey from Souss Massa"
		PGI "Zenatia Fort Pepper"
		PGI "Olive Oil of Amez Miz"
		PGI "Bousthemi Dates"
		PGI "Dir Beni Mellal Olive Oil"
		PGI "Lemta Fez Olive Oil"
		PDO "Eau de Rose Kelâat Mgouna Daidès"
		The Agricultural Label "Moroccan Wrinkled Black Olives"

Year of recognition	Number of the SDOQ recognized	Name of the product
2019	5	The PGI "Apple of Ifrane"
		The PGI "Dates Assiane of Figuig"
		The PGI "Atlas walnuts Haouz Marrakech"
		The PGI "Figue Ouled Frej"
		The PGI "Apple of Lhaouz"
2020	3	The PGI « Olive Oil of Ziz Guir
		The PGI "Lamb of Bejaad"
		« Kid of Atlas »
2021	4	The PGI "Henna of Maider Basin "
		The PGI "Tadiyinit-Nador Olive Oil"
		The PGI "Apricot of Midelt"
		GI "Mint Lbrouje"
2022	2	The GI " El Mangoub cumin"
		The PGI "olive oil of Oasis Skoura"
2023	4	The PGI "olive oil of Guerrouane"
		The PGI "dried fig of El Quoti Labiad Ouezzane"
		The PGI "olive oil of Essaouira Mogador"
		The PGI "almonds of Béni Snassen"
TOTAL		80 SDOQ

LOCAL PRODUCTS OFFER BY REGION

Region	Some key products
Tanger-Tetouan-Al Hoceima	Chefchaouen Goat Cheese, Jbal My Abdessalam Strawberry Honey, Ouezzane Extra Virgin Olive Oil, Rif Almonds, Dellahia Prickly Pear from Al Hoceima, Zghiri Orange, Samet (grape syrup), Figs from Ouezzane, Table olive from Ouezzane, Aromatic and medicinal plants, Honey from Al Hoceima, Peas from Aït Kamra, Melon from Rissana, Peanut, small onions of Tetouan.
Oriental	Clementine of Berkane, Meat Lamb Beni Gui, Aziza Bouzid Dates of Figuig, Boufeggous Dates, Nefles of Zegzel, Rosemary Dried Leaves of the Oriental, Rosemary Essential Oil of the Oriental, Olive Oil of Tafersite, Rosemary Honey of the Oriental, Desert Truffles, Quicotte, Chetouia Fig, argan Oil, Shell Bean, Talsint Goat Meat, Assiane Dates, Taddart Canned Olives, Prickly pear from El Guerbouz, Almonds from Sidi Bouhria, Olive Oil from Zkara.
Fes-Meknes	Lamb Meat of Beni Gui, Outat El Haj olive oil, Nabout de Taounate Dried Fig, Aknoul almond, Seffou olive oil, Timahdite lamb meat, Taounate olive oil, Lemta olive oil, Skoura olive oil, L'mta table olive, Guigou onion, Missour turnip, Meslagh watermelon, Honey, Immouzzer endive, "Chaari" figs, Tafajight apple, Capers, Taounate figs, Ain Leuh cherry, Agourai anise, Azrou apple, Sefrou plums.
Rabat-Sale-Kenitra	Lavender essential oil of Oulmes, Zaer Lentil, Maamora Truffles, Muscat Skhirate Grapes, Extra Fine Green Bean of Skhirate, Lavender of Oulmès, Middle Atlas young goat Meat, Couscous, Oulmes-Zaër Bovine Meat, Cactus of S'houl, Honey, Chamomile, Artichoke, Capers of Sidi Kacem .

Region	Some key products
Beni Mellal-Khenifra	Sefri pomegranate of Ouled Abdellah, Euphorbia honey, walnut of Azilal, Almonds of Azilal, grapes of Iwariden-Demnate, Aromatic and medicinal plants , olive oil of Ait Attab, olive oil of Dir Béni Mellal, olive oil of Ouaoumana, durum wheat of Ifermorgh, young goat meat of Moulay Bouazza, lamb meat of Boujaad, Figs of « Aïn kaïcher, young goat meat of Boujaad, grapes of Kerrouchen, pepper of Ouled Ali.
Casablanca-Settat	Doukkali grape, Quince of Oued El Maleh, Cactus Haddaoui, Cactus of Mejdoubia, Hot pepper of Oued El Maleh, Mint of "Tamaris", Mint of L'Brouj, Pomegranate Tmassine, Sardi lamb meat, White truffle of the Littoral, Figs of Had Ouled Frej, Doukkali rancid butter .
Marrakech-Safi	argan products, Tyout Chiadma olive oil, Safi capers, Aghmat Aylane Extra Virgin Olive Oil, Beldi Cumin of Rhamna, Haha almonds, Sardi lamb meat, Haha honey, Rhamna Cactus, Skhour Pomegranate, Pomegranate "Aïn Hjar", Pomegranate "Sour Lâaz", Chiadma Grape, Iggout Grape, Mint "El Fellouia", Iris, Okra d'Alouidane, Lemon bergamot of Marrakech, Fennel, Azembou semolina, Atlas Walnuts, Coastal white truffle, Kahhouli figs, Maachi mint, Amizmiz Olive Oil, Akermoud pea (Essaouira).
Draa-Tafilalet	Taliouine saffron, Majhoul dates from Tafilalet, Kelaat M'gouna-Dades rose, Boufeggous dates, Midelt apple, Jihel dates from Draa, Amellagou-Assoul almonds, Okra from Sifa Arfoud, Imlilchil apple, Rich honey, Durum wheat from Haut Ziz, Tazarine henna, Aromatic and medicinal plants, Rich olive oil, Alnif cumin, Saghrou lamb meat, Siroua lamb meat, young goat meat of Drâa, Millet of Aghbalou N'kardous.

Region	Some key products
Souss-Massa	argan products, Saffron of Taliouine, Amande de Tafraout, Boufeggous Dates, Bouittob of Tata Dates, couscous Khoumassi, Jihel Dates of Draa, Henne d'Ait Ouabelli, Henna of Foum- Zguid, euphoribia honey of Sahara, camel milk of Sahara, aromatic and medicinal plants, carobs, Capers, honey, bananas of Tamri.
Guelmim-Oued Noun	argan products, Ait Baamrane prickly pear, Sahara spurge honey, Guelmim cactus, couscous Khoumassi, Sahara camel milk, Camel milk fresh cheese, Fermented camel milk "Lfrik", Loudek, Tichtar.
Laayoune-Sakia El Hamra	couscous Khoumassi, Sahara Camel Milk, Camel Milk Fresh Cheese, Jdari, Camoun Reg, Fermented Camel Milk "Lfrik", Loudek, Tichtar.
Dakhla-Oued Eddahab	couscous Khoumassi, Sahara Camel Milk, Camel Milk Fresh Cheese, Fermented Camel Milk "Lfrik", Loudek, Tichtar.



ANNEX 3

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EXAMPLES OF SUBSIDIES FOR AGRICULTURAL INVESTMENTS

SUBSIDIES FOR HYDRO-AGRICULTURAL FACILITIES

Operations	Subsidized operations	Subsidy rates (% of cost) and ceilings	
Collective drip irrigation projects			
Collective drip irrigation project associated with the pressurized irrigation network	- Head station, pipes, and drippers	100% 38.000 Dh/Ha	
Collective drip irrigation project not linked to the pressurized irrigation network	- Wells and boreholes - Pumping device, - Head station, pipes and drippers	100% 38.000 Dh/ha	
	- Construction of the water storage basin	100% 12.000 Dh/ha	
Operations	Subsidy rates (% of cost) and ceilings		
	Less than 5 ha	Between 5 ha and 20 ha	More than 20 ha
Individual drip irrigation			
Wells and boreholes			
Pumping device			
Header station	100%	75%	60%
Lines	38.000 Dh/ha	28.500 Dh/ha	23.000 Dh/ha
Drippers			
Automatism			
Water storage basin	100% 12.000 Dh/ha	75% 9.000Dh/ha	60% 7.000 Dh/ha

SUBSIDIES FOR FARM EQUIPMENT

Agricultural tractors	Subsidy rate (% of acquisition cost)	Subsidy ceiling (DH/unit)
2WD tractors:		
- Less than 50 HP	30%	52.000
- From 50 HP to less than 70 HP		62.000
- 70 CV and more		72.000
4WD tractors: :		
- Less than 50 HP	30%	60.000
- From 50 HP to less than 70 HP		70.000
- 70 CV and more		80.000

SUBSIDIES FOR TREE PLANTS

Operations	Rate and amount of subsidy
Planting and creation of orchards	
Acquisition of certified olive and almond seedlings, certified or common fig, carob, pistachio, walnut, pomegranate, cherry and medlar seedlings	60% to 80% of the purchase price
Date palm	Acquisition of seedlings for the densification and rehabilitation of approved multiplying palm groves
	Acquisition of seedlings for the extension of palm groves
Creation of homogeneous olive orchards	From 3,500 to 5,000 Dh/Ha

aid to animal sectors

Operations	Rate	Grant ceiling (DH)
Production of selected breeding animals of pure sheep breeds		700 to 850 MAD/head
Acquisition of the following imported dairy heifers: Friesian Holstein, Black-coated Holstein, Red-coated Holstein, Red-coated Breeds, Brune, Jersey, Tarentaise, Normande		<ul style="list-style-type: none"> - 3,000 Dhs/Head for the first 3 imported heifers - 5,000 Dhs/Head from the 4th to the 10th imported heifer - 2,500 Dhs/Head for the 11th imported heifer and beyond
Acquisition of livestock equipment		
Crusher		6.000
Mixer		15.000
Feed unit attached to the farm		60.000
Flail forage harvester		13.500
1-spout corn forage harvester		16.500
2-spout corn forage harvester		42.000
Self-propelled corn forage harvester		300.000
Artificial insemination equipment		2.000
Seed storage container		6.000
Pad cooling system for cage layer rearing units		30.000
	30%	

Construction of livestock buildings

Operations	Rate	Subsidy ceiling (MAD/Sheltered head)
Modern barn:		
- Covered shackled		200
- Free stall		50
Traditional barn	25%	75
Sheepfold and Goat Farm:		
-Modern		80
-Traditional		60

AID WITH ORGANIC CERTIFICATION

Products of plant origin:

Superficie de l'Unité de production	Taux de subvention (% de coût)	Plafonds en DH/Unité/an
Equal to or greater than 0.5 ha and less than 5 ha	90%	10.000
Equal to or greater than 5 ha and less than 10 ha		20.000
Equal to or greater than 10 ha and less than 20 ha	70%	30.000
Greater than 20 ha		40.000

Products of animal origin:

Certification of livestock and beekeeping products	Subsidy rate (% cost)	Ceilings in DH/Unit/year
	80%	25.000

PROMOTION AND DIVERSIFICATION OF AGRICULTURAL EXPORTS

Fresh vegetable products:

- For citrus fruits

Destination	Amount of aid in Dirhams/Ton	Quantities eligible for aid
Ukraine, China and Arab Gulf countries	500	the quantities exported, from 1 September 2017, in excess of the quantities exported during the reference commercialization year from 1 September 2000 to 31 August 2001
Destinations other than Russia, Ukraine, China, Arab Gulf States and EU Member States	500	the quantities exported in excess of the quantities exported during the reference commercialization year from 1 September 2000 to 31 August 2001

- For the tomato

Amount of aid in Dirhams/Ton	Quantities eligible for aid
750	The quantities exported outside the European Union in excess of the quantities exported during the reference season from 1 September 2007 to 31 August 2008

- For the strawberry

Aid amount in Dirhams/Ton	Quantities eligible for aid
500	All quantities exported outside the European Union

- **Animal products:**

Concerned products	Amount of aid
Hatching eggs	1 dirham per kilogram exported
Day-old chicks	1 dirham per kilogram exported

Valued Products: Olive Oil Export Promotion Subsidy

Category	Amount of aid in Dirhams/Ton
All categories except lamp oil	2.000

AID TO RECOVERY UNITS

Crop production:

Type of unit	Subsidy rate	Subsidy ceiling (DH)
Construction and equipment of packaging units for seed production	10%	1.500.000
Construction and equipment of cereal storage units	10%	3.200.000
Construction and equipment of citrus fruit packaging units	30%	14,000,000 for a production capacity of 5,000 T/year to less than 10,000 T/year
		21,000,000 for a production capacity of 10,000 T/year and more
Construction and equipment of packaging units for leaf vegetables and vegetables products, tree products and any other fresh fruit, with the exception of citrus fruit	30%	4,000,000 for a production capacity of less than 4,000 T/year
		10,000,000 for a production capacity of 4,000 T/year to less than 10,000 T/year
		15,000,000 for a production capacity of 10,000 T/year and more

Type of unit	Subsidy rate	Subsidy ceiling (DH)
Construction and equipment of cold storage units for agricultural products other than dates	25%	3.000.000
Construction and equipment of cold storage units for dates.	25%	800.000
Construction and equipment of olive crushing units	10%	2.000.000
Construction and equipment of modern olive oil bottling units	10%	1.000.000
Equipment for bottling olive oil	10%	500.000
Construction and equipment of olive-pomace transformation and upgrading units	10%	1.500.000
Construction and equipment of units for the valorization of plant products by transformation and/or preserving and/or freezing/deep-freezing and/or drying and/or crushing and/or extraction of essential oils and oils other than olive oil, including packaging of products resulting from the abovementioned recovery operations	20%	2.000.000

Animal production:

Type of unit	Subsidy rate	Subsidy ceiling (DH)
Construction and equipment of fresh milk upgrading units for the manufacture of cheese and dairy derivatives	30%	3.000.000
Construction and equipment of industrial red meat slaughterhouses with cutting room	30%	18.000.000

Type of unit	Subsidy rate	Subsidy ceiling (DH)
Construction and equipment of red meat cutting units	30%	4.500.000
Construction and equipment of red meat transformation units	30%	4.500.000
Equipment of red meat transformation units	30%	600.000
Construction and equipment of industrial poultry slaughterhouses with cutting room	30%	12.000.000
Construction and equipment of poultry meat cutting units, whether or not processed, including wrapping	10%	3.000.000
Construction and equipment of egg packing units	10 %	600.000
Construction and equipment of transformation units for eggs intended for consumption	10%	2.200.000
Construction and equipment of poultry droppings drying units	30%	600.000
Construction and equipment of beekeeping products upgrading units	10 %	500.000

Milk collection centers

Types of units	Rate (%)	Aid ceiling (Calculation basis)
Construction and equipment of milk collection centers	30 %	130.000 Dh for milk trays 200.000 Dh for the generator or electrification of the milk collection center 200.000 Dh for the construction of the milk collection center

LUMP-SUM GRANTS FOR AGGREGATION PROJECTS

Unit amounts for the calculation of the flat-rate subsidy to encourage agricultural aggregation in the plant sectors

Catégorie de projet d'agrégation agricole	Montant unitaire		
	Small areas (*)	Medium areas (*)	Large areas (*)
Citrus aggregation project around a packaging and/or processing unit	2 250 dhs/ha	1 500 dhs/ha	750 dhs/ha
Olive tree aggregation project around an olive crushing and/or canning unit	Bour : 675 dhs/ha Irrigated : 1 650 dhs/ha	Bour : 450 dhs/ha Irrigated : 1 100 dhs/ha	Bour : 225 dhs/ha Irrigated : 550 dhs/ha
Project for the aggregation of fruit growing around a cold storage and/or packaging and/or processing unit	2 250 dhs/ha	1 500 dhs/ha	750 dhs/ha
Vine aggregation project around a packaging and/or processing unit	2 250 dhs/ha	1 500 dhs/ha	750 dhs/ha
Projet d'agrégation des cultures maraîchères autour d'une unité d'entreposage frigorifique et/ou de surgélation et/ou de conditionnement et/ou de transformation	4,500 dhs/ha or 4,500 dhs/80 feet (**)	3,000 dhs/ha or 3,000 dhs/80 feet (**)	1,500 dhs/ha or 1,500 dhs/80 feet (**)
Project for the aggregation of market garden crops around a cold storage and/or freezing and/or packaging and/or processing unit	5,250 dhs/ha	3,500 dhs/ha	1,750 dhs/ha

Catégorie de projet d'agrégation agricole	Montant unitaire		
	Small areas (*)	Medium areas (*)	Large areas (*)
Project for the aggregation of autumn cereals (durum wheat, soft wheat, barley) around a grain storage and/or processing unit	Bour: 600 dhs/ha Irrigated: 825 dhs/ha	Bour: 400 dhs/ha Irrigated: 550 dhs/ha	Bour: 200 dhs/ha Irrigated: 275 dhs/ha
Project for the aggregation of irrigated spring cereals (rice, corn) around a grain storage and/or processing unit	Rice: 1,200 dhs/ha Corn: 825 dhs/ha	Rice: 800 dhs/ha Corn: 550 dhs/ha	Rice: 400 dhs/ha Corn: 275 dhs/ha
Project for the aggregation of legumes around a storage and/or packaging and/or processing unit	750 dhs/ha	500 dhs/ha	250 dhs/ha
Project for the aggregation of oilseed crops around a crushing unit	1,955 dhs/tonne of production delivered		
Project for the aggregation of sugar crops around a processing unit (***)	825 dhs/ha	550 dhs/ha	275 dhs/ha
Project for the aggregation of certified cereal seeds around a packaging unit	1,500 dhs/ha	1,000 dhs/ha	500 dhs/ha
Project for the aggregation of certified potato seeds around a refrigeration and/or packaging unit	6,000 dhs/ha	4,000 dhs/ha	2,000 dhs/ha
Project for the aggregation of certified legume seeds around a packaging unit	1,500 dhs/ha	1,000 dhs/ha	500 dhs/ha

Agricultural aggregation project category	Unit amount		
	Small areas (*)	Medium areas (*)	Large areas (*)
Project for the aggregation of organic citrus fruits around a packaging and/or processing unit	3,000 dhs/ha	2,000 dhs/ha	1,000 dhs/ha
Olive tree aggregation project carried out in organic cultivation around a crushing and/or preserved olive unit	1,425 dhs/ha	950 dhs/ha	475 dhs/ha
Project for the aggregation of organic market garden crops around a refrigeration and/or packaging and/or freezing and/or processing unit	6,000 dhs/ha	4,000 dhs/ha	2,000 dhs/ha
Argan tree aggregation project around a crushing and/or extraction and/or processing unit	500 DH/tonne of production delivered		
Saffron aggregation project around a packaging and/or processing unit	7,500 dhs/ha	5,000 dhs/ha	2,500 dhs/ha
Perfume rose aggregation project around a processing and/or packaging unit	7,500 dhs/ha	5,000 dhs/ha	2,500 dhs/ha
Sesame aggregation project around a packaging and/or processing unit	3,000 dhs/ha	2,000 dhs/ha	1,000 dhs/ha
Carob aggregation project around a packaging and/or processing unit	2,250 dhs/ha	1,500 dhs/ha	750 dhs/ha

Agricultural aggregation project category	Unit amount		
	Small areas (*)	Medium areas (*)	Large areas (*)
Project for the aggregation of aromatic and medicinal plants grown around a packaging and/or processing unit	3,000 dhs/ha	2,000 dhs/ha	1,000 dhs/ha
Cactus aggregation project around a packaging and/or processing unit	3,000 dhs/ha	2,000 dhs/ha	1,000 dhs/ha

Unit amounts for calculating the flat-rate subsidy to encourage agricultural aggregation in the animal sectors

Agricultural aggregation project category	Unit amount		
	Small herds (*)	Medium herds (*)	Large herds (*)
Project for the aggregation of red bovine and/or sheep and/or goat meat around a fattening unit and/or a slaughterhouse	525 dhs/head for cattle 150 dhs/head for sheep and goats	350 dhs/ head for cattle 100 dhs/head for sheep and goats	175 dhs/ head for cattle 50 dhs/head for sheep and goats
Project for the aggregation of camel red meats around a fattening unit and/or a slaughterhouse	1,200 dhs/head	800 dhs/head	400 dhs/head
Cow's milk aggregation project around a dairy processing unit	420 dhs/head	280 dhs/head	140 dhs/head
Goat milk aggregation project around a dairy processing unit	150 dhs/head	100 dhs/head	50 dhs/head
Camel milk aggregation project around a dairy processing unit	1,350 dhs/head	900 dhs/head	450 dhs/head

Agricultural aggregation project category	Unit amount		
	Small herds (*)	Medium herds (*)	Large herds (*)
Project for aggregating table eggs around a packaging unit	300 dhs/tonne of production delivered	200 dhs/tonne of production delivered	100 dhs/tonne of production delivered
Project for aggregating table eggs around a processing unit	600 dhs/tonne of production delivered	400 dhs/tonne of production delivered	200 dhs/tonne of production delivered
Beekeeping aggregation project around a honey extraction and packaging unit (honey house)	11,250 dhs/tonne of production delivered	7,500 dhs/tonne of production delivered	3,750 dhs/tonne of production delivered

USEFUL CONTACT



CENTRAL INSTITUTIONS

INSTITUTION	PHONE
Ministry of Agriculture, Maritime Fisheries, Rural Development and Water and Forests (MAFRDW) Department of Agriculture.	+212 537 66 53 00 +212 537 66 54 50 +212 537 66 56 00
General Council for Agricultural Development (CGDA)	+212 537 68 64 61
Strategy and Statistics Direction (SSD)	+212 537 66 5517/18
IT Systems Department (DSI)	+212 537 10 31 82
Financial Management (DF)	+212 537 10 31 81
Administrative and Legal Affairs Direction	+212 537 10 31 71/72
Human Resources Department (HRD)	+212 537 10 31 73/74
Development of Production Chains Direction	+212 537 10 31 76
Department of Irrigation and Spatial Planning (DIAEA)	+212 537 10 31 78
Education, Training and Research Direction (ETRD)	+212 537 10 31 79
Development of Rural Areas and Mountain Areas Direction (DRAMAD)	+212 537 66 76 71
National Office of the Agricultural Council (ONCA)	+212 537 77 65 13 +212 537 21 73 12/02
National Interprofessional Office for Cereals and Legumes (ONICL)	+212 537 21 73 12/02
Agency for Agricultural Development (ADA)	+212 537 57 38 01
National Agency for the Development of the Oasian Zones and the Argan Tree (ANDZOA)	+212 537 70 66 77
National Food Safety Office (ONSSA)	+212 537 67 65 05/06 +212 537 77 94 72

INSTITUTION	PHONE
Food Export Control and Coordination organization	+212 522 30 81 22
National Institute of Agricultural Research (INRA)	+212 537 77-09-55/ 77-26-42
Agricultural Credit of Morocco (ACM)	+212 537 73 88 88 +212 537 72 78 55
Hassan II Agricultural and Veterinary Institute (IAV Hassan II)	+212 537 77 09 35 +212 537 77 81 10
National Seed Marketing Company (SONACOS)	+212 537 76 24 89
National School of Agriculture of Meknes (ENA Meknes)	+212 535 30 02 39/40/ 41
National Forestry School of Engineers (ENFI)	+212 537 86 11 49 +212 537 86 37 04
Official Laboratory of Chemical Analysis and Research (LOARC)	+212 522 30 21 98
Biological, Pharmaceutical and Veterinary Production Company (BIOPHARMA)	+212 537 69 16 92
Royal Society for the Encouragement of the Horse (SOREC)	+212 537 27 10 04/05
Port Silos Company (SOSIPO)	+212 522 97 47 61 +212 522 23 55 74
National Agency for Land Conservation, Cadastre and Cartography (ANCFC)	+212 537 70 90 01 +212 537 70 57 17
Pillar II Resource Center (PRC II)	+212 535 56 72 02

REGIONAL AGRICULTURAL DIRECTIONS

ENTITY	PHONE
Regional Agricultural Direction of Tanger-Tetouan-Al Houceima	+212 539 34 34 13
Regional Agricultural Direction of Oriental	+212 536 70 20 18
Regional Agricultural Direction of Fes-Meknes	+212 535 51 56 62
Regional Agricultural Direction of Rabat-Sale-Kenitra	+212 537 36 30 22
Regional Agricultural Direction of Beni Mellal-Khenifra	+212 523 42 49 55
Regional Agricultural Direction of Casablanca-Settat	+212 523 39 40 20
Regional Agricultural Direction of Marrakech-Safi	+212 524 45 73 68
Regional Agricultural Direction of Draa-Tafillalet	+212 535 57 04 00
Regional Agricultural Direction of Souss-Massa	+212 528 82 71 31
Regional Agricultural Direction of Guelmim-Oued Noun	+212 528 77 20 96
Regional Agricultural Direction of Laayoune-Sakia-Al hamra	+212 528 99 33 04
Regional Agricultural Direction of Dakhla-Oued Ed-Dahab	+212 528 93 16 98

SINGLE DESK FOR DPAS AND ORMVAS

REGION	DPA/ORMVA	CONTACT DETAILS
BENI MELLAL-KHENIFRA	DPA OF AZILAL DPA OF BENI MELLAL DPA OF KHENIFRA DPA OF KHOUBIBGA ORMVA OF TADLA	Phone : +212 523 45 83 98 Phone : +212 523 48 25 76 Phone : +212 535 58 67 10 Phone : +212 523 56 26 68 Phone : +212 523 43 50 48
CASABLANCA-SETTAT	DPA OF BENSIMMANE DPA OF BERRCHID DPA OF CASABLANCA DPA OF EL JADIDA DPA OF SETTAT ORMVA OF DOUKKALA	Phone : +212 523 29 11 12 Phone : +212 522 03 06 03 Phone : +212 522 27 88 71 Phone : +212 523 34 29 90 Phone : +212 523 40 22 87 Phone : +212 523 34 22 70

REGION	DPA/ORMVA	CONTACT DETAILS
ORIENTAL	DPA OF FIGUIG DPA OF NADOR DPA OF OUJDA DPA OF TAOURIRT DPA OF GUERCIF DPA OF JERADA DPA OF DRIOUCH ORMVA OF MOULOUYA	Phone : +212 536 79 81 65 Phone : +212 536 60 64 13 Phone : +212 536 68 49 02 Phone : +212 536 69 94 22 Phone : +212 536 67 62 94 Phone : +212 536 82 13 96 Phone : +212 536 60 64 13 Phone : +212 536 61 34 68
MARRAKECH-SAFI	DPA OF CHICHAOUA DPA OF ESSAOUIRA DPA OF MARRAKECH DPA OF RHAMNA DPA OF SAFI	Phone : +212 524 35 30 86 Phone : +212 524 78 41 12 Phone : +212 524 43 10 59 Phone : +212 524 41 24 44 Phone : +212 524 62 31 88
DRAA-TAFILALET	ORMVA OF OUARZAZATE ORMVA OF TAFLALET	Phone : +212 524 88 26 14 Phone : +212 535 57 04 00
RABAT-SALE-KENITRA	DPA OF KHEMISSET DPA OF RABAT ORMVA OF GHARB	Phone : +212 537 55 29 13 Phone : +212 537 63 13 60 Phone : +212 537 37 45 02
FES-MEKNES	DPA OF BOULMANE DPA OF FES DPA OF EL HAJEB DPA OF IFRANE DPA OF MEKNES DPA OF SEFROU DPA OF TAOUNATE DPA OF TAZA	Phone : +212 535 58 54 58 Phone : +212 535 62 57 42 Phone : +212 535 54 33 03 Phone : +212 535 56 21 87 Phone : +212 535 52 00 14 Phone : +212 535 68 26 73 Phone : +212 535 62 76 92 Phone : +212 535 67 32 32
SOUSS-MASSA	DPA OF TATA DPA OF TIZNIT DPA OF AGADIR ORMVA OF SOUSS MASSA	Phone : +212 528 80 20 58 Phone : +212 528 86 20 76 Phone : +212 528 84 00 63 Phone : +212 528 84 08 27
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REGION	DPA/ORMVA	CONTACT DETAILS
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THE CHAMBERS OF AGRICULTURE

THE CHAMBERS OF AGRICULTURE	PHONE
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The Chamber of Agriculture of Fes-Meknes	+212 535 52 20 70
The Chamber of Agriculture of Rabat-Sale-Kenitra	+212 537 32 72 86 +212 537 37 38 59
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The Chamber of Agriculture of Casablanca-Settat	+212 523 34 27 26
The Chamber of Agriculture of Tanger-Tetouan-Al Hoceima	+212 539 96 46 59
The Chamber of Agriculture of Draa-Tafillalet	+212 535 79 10 65/70
The Chamber of Agriculture of Souss-Massa	+212 528 23 09 28
The Chamber of Agriculture of Guelmim-Oued Noun	+212 528 77 36 08
The Chamber of Agriculture of Laayoune-Sakia-Al hamra	+212 528 89 47 52
The Chamber of Agriculture of Dakhla-Oued Ed-Dahab	+212 528 89 70 44/63

INTERPROFESSIONAL ORGANIZATIONS IN THE MOROCCAN AGRICULTURAL SECTOR

NAME	ADDRESS	CONTACT DETAILS
Olivie	Moroccan Interprofessional Olive Federation (INTERPROLIVE), Housing estate Elwiffak Errak, Sector 3, n°3310, Temara	Phone : +212 537 58 28 98 Fax : +212 537 62 97 94 benali.rachid1961@gmail.com
Vegetable grower	Moroccan Interprofessional Federation for the Production and Export of Fruits and Vegetables (FIFEL), Chamber of Agriculture of the Souss Massa Drâa Region, New administrative district- Haut Founty- Agadir	Phone : +212 528 22 99 17 Fax : +212 528 22 82 34 fifel.fifel@gmail.com
Seed	National Interprofessional Federation of Seeds (FNIS), 5 Rue Oum Rabii, Appt n°3 Agdal, Rabat	Phone : +212 537 77 40 24 Fax : +212 537 77 20 40 fnis.semences@gmail.com
Cereals and Legumes	Interprofessional Federation of Cereal Activities (FIAC), Corner Bd Abou Majid Al Bahar and El Bribhi El Idrissi Street, Casablanca	Phone : +212 522 30 73 23 Fax : +212 522 30 65 51 fnm@fnm.org.ma fiac.cereales@gmail.com
Citrus	Moroccan Interprofessional Federation of Citrus Fruits (Maroc Citrus), Building F, project "the Yacht" n ° 79, corner bd of the Corniche and Abu Waqt street, Casablanca	Phone : +212 522 94 18 71 Fax : +212 522 94 19 08 Maroccitrus2014@gmail.com
Sugar	Moroccan Interprofessional Federation of Sugar (FIMASUCRE), Av. Ibn Al Hajjar, Res. Al Waha, Agdal, app 9, Rabat	Phone : +212 537 68 31 50 Fax : +212 537 68 31 52 againg@menara.ma
Arboreal	Federation for the Development of Fruit Arboriculture (FEDAM), Av. Allal Ben Abdellah, Imm. Al Watania, App. 631, New Town, Meknes	Phone : +212 535 52 82 40 Fax : +212 535 40 41 42 abelkora@agrojus.com fedammaroc@gmail.com
Organic	Organic morocco	
Date palm	Moroccan Interprofessional Federation of Dates (FIMADATTES), N° 5, Imm. Kawtar, Inuit Street, Errachidia	Fax : +212 535 57 70 86 fimadattes@gmail.com
Argan	Interprofessional Federation of the Argan Sector (FIFARGANE) INRA - Ait Melloul, Prefecture Inezgane, Ait Melloul	Phone : +212 528 24 00 06 omegainstitut@gmail.com

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Saffron	Moroccan Interprofessional Federation of Saffron (FIMASAFRAN), Dar Zaafrane, Taliouine	Phone : +212 528 53 40 42 Fax : +212 528 53 44 13 darzeafra@gmail.com
Rice	National Interprofessional Rice Federation (FNIR), 45 Industrial district, Kenitra	Phone : +212 661 13 74 61 Fax : +212 537 36 49 15 Khalile1955@gmail.com
Oilseed	Interprofessional Federation of Oilseeds (FOLEA), 1 Rue du corporal Corbi, Roches Noirs, B.P 3095, 20300, Casablanca	Phone : +212 661 16 86 26 Fax : +212 522 35 87 40 zaz@lesieur-cristal.co.ma
Milk	Interprofessional Federation of the Dairy Sector MOROCCO MILK Sector 25, ARRYANA Street, villa 134, Ennakhil Avenue, Hay RIAD RABAT - Rabat.	Phone : +212 537 57 20 85 Fax : +212 537 57 20 85 fimalait14@gmail.com
Beekeeping	Moroccan Interprofessional Federation of Beekeeping (FIMAP), 6 Ibn Al hajjar Street, Appt. N°5, Agdal, Rabat	Phone : +212 537 77 10 62/63 Fax : +212 537 77 10 62/63 fimap-maroc@yahoo.fr
Poultry	Interprofessional Federation of the Poultry Sector (FISA), 123, Emile Zola Street, Casablanca	Phone : +212 522 31 12 49 Fax : +212 522 54 24 88/89 fisamaroc@gmail.com
Red meat	Interprofessional Federation of Red Meats (FIVIAR), Sector 19, lot B9, villa Hourre, Hay Riad, Rabat	Phone : +212 537 80 32 46 Fax : +212 537 80 32 46 k.chajai@gmail.com/fiviar@fiviar.ma
Red fruits	Moroccan Interprofessional Federation of Red Fruits (INTERPROBERRIES MOROCCO) Chamber of Agriculture of the Tangier-Tetouan region-Al Hoceima, Bd, Mehdi Ben Toumart 92000 Larache	Phone : +212 537 43 27 79
Agroalimentaire	National Federation of Agri-Food (FENAGRI) Casablanca - Morocco	Phone : +212 703 18 10 17 Fax : +212 522 99 63 58 fenagri@fenagri.org
Canning industry	Federation of Canning Industries of Agricultural Products of Morocco (FICOPAM) Ain Sebaâ Center, Esc B, 2nd floor, N° 35, Rabat Casablanca Road 20 250	Phone : +212 522 35 10 81 Fax : +212 522 35 17 40 dg@ficopam.ma / sec2@ficopam.ma

REGIONAL INVESTMENT CENTERS

REGIONAL INVESTMENT CENTERS	ADDRESS	CONTACT DETAILS
RIC Casablanca-Settat	60, Avenue Hassan II, 20000, Casablanca	Phone : +212 522 48 18 88 Fax : +212 522 48 15 21 www.casainvest.ma
RIC Rabat-Sale-Kénitra	23, avenue of Victory, 10090, Rabat	Phone : +212 537 77 64 00 Fax : +212 537 77 63 88 www.rabatinvest.ma
RIC Tanger-Tetouan-Al Hoceima	Avenue Omar Ibn Al Khattab, Tanger	Phone : +212 539 34 23 03 Fax : +212 539 94 33 14 www.investangier.com
RIC Fes-Meknes	Place of the Resistance angle Bd. Moulay Youssef and Allal El Fassi, Fez	Phone : +212 535 65 20 57 Fax : +212 535 65 16 46 www.fesmeknesinvest.ma
RIC Marrakech-Safi	Bd John Kennedy, Jnane El Harti, Guéliz, Marrakech	Phone : +212 524 42 04 91 Fax: +212 524 42 04 92 www.crimarrakech.ma
RIC Souss-Massa	Cite Founty B.P: 31.333, Agadir	Phone : +212 528 23 08 77 Fax : +212 528 23 08 81 www.agadirinvest.com
RIC Oriental	Bd Prince Mly El Hassan, 60000, Oujda	Phone : +212 536 68 28 27 Fax: +212 536 69 06 81 www.orientalinvest.ma
RIC Beni Mellal-Khenifra	Bd. Bayroud, 23000, Béni Mellal	Phone : +212 523 48 20 72 Fax : +212 523 48 23 13 www.coeurdumaroc.ma
RIC Dakhla-Oued Eddahab	Avenue Ahmed Ben Chekroun, Massira II, B.P.01 Dakhla	Phone. : +212 528 89 85 35 Fax : +212 528 89 79 12 www.cridakhla.com
RIC Laayoune-Sakia Elhamra	Bd Mekka, BP 2266, 70 000, Laayoune	Phone. : +212 528 89 11 89 Fax : +212 528 89 11 79 www.laayouneinvest.ma
RIC Guelmim-Oued Noun	Mohamed VI Street, 81000, BP 202, Guelmim, Morocco	Phone. : +212 528 77 15 55 Fax : +212 528 77 17 77 www.guelmiminvest.ma
RIC Draa-Tafilalet	N° 23 Bd Bir Anzarane, Downtown, Errachidia	Phone : +2125 35 57 38 01 Fax: +2125 35 57 31 50 www.draatafilaletinvest.com

HYDRAULIC BASIN AGENCIES

HYDRAULIC BASIN AGENCIES	ADDRESS	CONTACT DETAILS
Hydraulic Basin Agencie of Oum Er-Rbia (ABHOER)	BP. 511, Code Postale 23 000, Béni Mellal	Phone : +212 523 48 23 55 Fax : +212 23 48 94 15 agence@abhoer.ma www.abhoer.ma
Hydraulic Basin Agencie of Bouregreg et de la Chaouia (ABHBC)	Casablanca Road, PO Box 262, Benslimane	Phone : +212 523 29 08 21 FAX : +212 523 29 09 99 abhbouregreg@yahoo.fr abhbc@abhbc.ma www.abhbc.ma
Hydraulic Basin Agencie of Tensift (ABHT)	Av. Postal address: 2388, Marrakech	Phone : +212 524 44 89 64 Fax : +212 524 43 56 20 info@eau-tensift.net www.eau-tensift.net
Hydraulic Basin Agencie of Sebou (ABHS)	Place of the Resistance angle Bd. Moulay Youssef and Allal El Fassi, Fez	Phone : +212 535 64 29 97 Fax : 0535640444 www.abhsebou.ma
Hydraulic Basin Agencie of Moulouya	Comics Jean Kennedy, Jean El Harti, Gueliz, Marrakech	Phone : +212 536 68 27 94 Fax : +212 536 68 38 48 contact@abhmoulouya.ma www.abhmoulouya.ma
Hydraulic Basin Agencie of (ABHSMD)	Avenue Moulay Abdellah, B.P 432, 80000, Agadir	Phone : +212 528 84 25 51 Fax : +212 528 84 20 82 abhsmd@menara.ma
Hydraulic Basin Agencie of Guir-Ghris-Ziz	Agency of the hydraulic basin of Guir-Ghris-Ziz, Errachidia	Phone : +212 535 57 19 64
Hydraulic Basin Agencie of Sakia El Hamra & Oued Eddahab	BP 492, 70,000, Laayoune	Phone : +212 528 89 33 08 Fax : +212 528 89 34 25

However, for further information concerning the rates and ceilings and the procedure for filing for subsidies, interested parties can consult the MAMPDREF www.agriculture.gov.ma website or the ADA website: www.ada.gov.ma or contact the one-stop shops directly at the level of the Provincial Directorates of Agriculture and the Regional Offices of Agricultural Development or the Regional Directorates of Agriculture.



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