

Corporate Brochure



MOROCCO

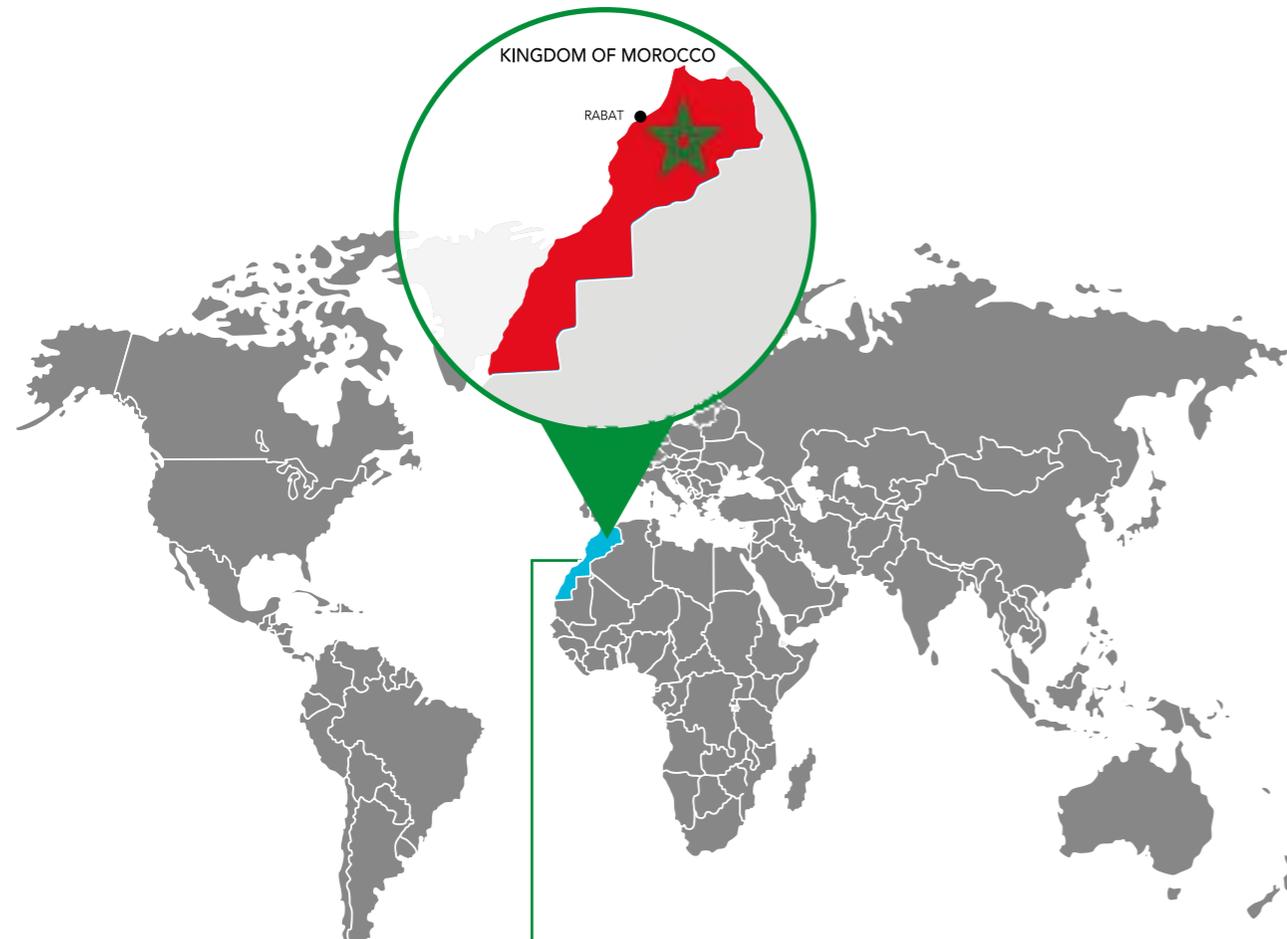


Kingdom of Morocco



Ministry of Agriculture
and Maritime Fisheries

KINGDOM OF MOROCCO



- Capital: Rabat
- Size: 710 850 sq Km
- Population: 33,8 millions
- Currency: Moroccan Dirham (MAD)
- Time zone: UTC + 0 ; + 1 summer time



His Majesty The King Mohamed VI

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The agriculture sector in Morocco

THE AGRICULTURE SECTOR IN MOROCCO

The agricultural sector in Morocco holds a strategic position in the Moroccan economy and plays an important role in the socio-economic development of the Kingdom. It contributes up to 16.5% of the GDP and remains an income source for 40% of the working population in Morocco.

A vital sector	16.5% of national GDP
Employment Provider	40% of the working population of the Kingdom
A great potential for export	2.2 billion (USD), which counts as 11% of total exports of Morocco
Covered area	9.2 million hectares of which 11% in irrigated area



Moroccan agriculture possesses several assets, the most important being:

- ✿ The geographical location of Morocco and its immediate proximity to the European market, with a significantly progressing logistics sector;
- ✿ The presence of a national potential and a dynamic market, which is a major outlet through the population growth and the rise of living standards;
- ✿ A qualified and highly competitive agricultural workforce;
- ✿ Demonstrated comparative advantages for several products (in particular fruits and vegetables);
- ✿ The presence at a national level of several models of successful agricultural and agro-industrial companies.



AGRICULTURAL STRATEGY « GREEN MOROCCO PLAN »

GREEN MOROCCO PLAN

The new agricultural strategy «Green Morocco Plan», launched in 2008, was developed to make agriculture a key driver of the national economy growth within the next 10 to 15 years, with significant impact in terms of GDP growth, job creation, exports and fight against poverty. The plan aims to develop a plural, open to external markets, territorially diversified and especially sustainable agriculture.

MACRO- ECONOMIC OBJECTIVES OF THE GREEN MOROCCO PLAN



THE GREEN MOROCCO PLAN IS BASED ON SEVEN PRINCIPLES :

First principle is considering agriculture as the main growth driver in Morocco until 2020, through the strengthening of its contribution to national GDP, the creation of employment, the exports and the fight against poverty.

Second principle is based on the choice of aggregation as an innovative tool for organizing a better distribution of profits within the agricultural value chain, along with promoting the quality of agricultural inputs, the transfer of skills and technology, the creation of balanced links between small farmers and capital markets, and thereby price stability.

Third principle is about the development of Moroccan agriculture as a whole with no exception. Indeed, given the great diversity of national agriculture, the Green Morocco Plan has adopted two approaches that are differentiated according to the actors.

The fourth principle promotes the attraction of private investment to a level of around 10 billion Dirhams via a targeted Morocco's offer supported by public aid.

The fifth principle is the adoption of a participatory and contractual approach as a pragmatic transactional basis for achieving the identified projects.

Therefore, targeted partnerships should take different forms with tailored programs:

1. The Regional Agricultural Plans (RAP) established between Regions, Chambers of Agriculture and the Ministry of Agriculture and Maritime Fisheries;
2. Contracts-programs (CP) about farming sectors, signed between interbranch organizations or representative professional organizations and the Ministry of Agriculture and Maritime Fisheries;
3. The aggregation agreements signed between the government and the aggregator, along with aggregation contracts between aggregators and aggregated.

The sixth principle is related to the recasting of the sectoral framework involving many levels: the land, the water policy, the taxation and national marketing chain, along with the support, the monitoring and the evaluation.

The seventh and last principle is linked to the preservation of natural resources for a sustainable agriculture.

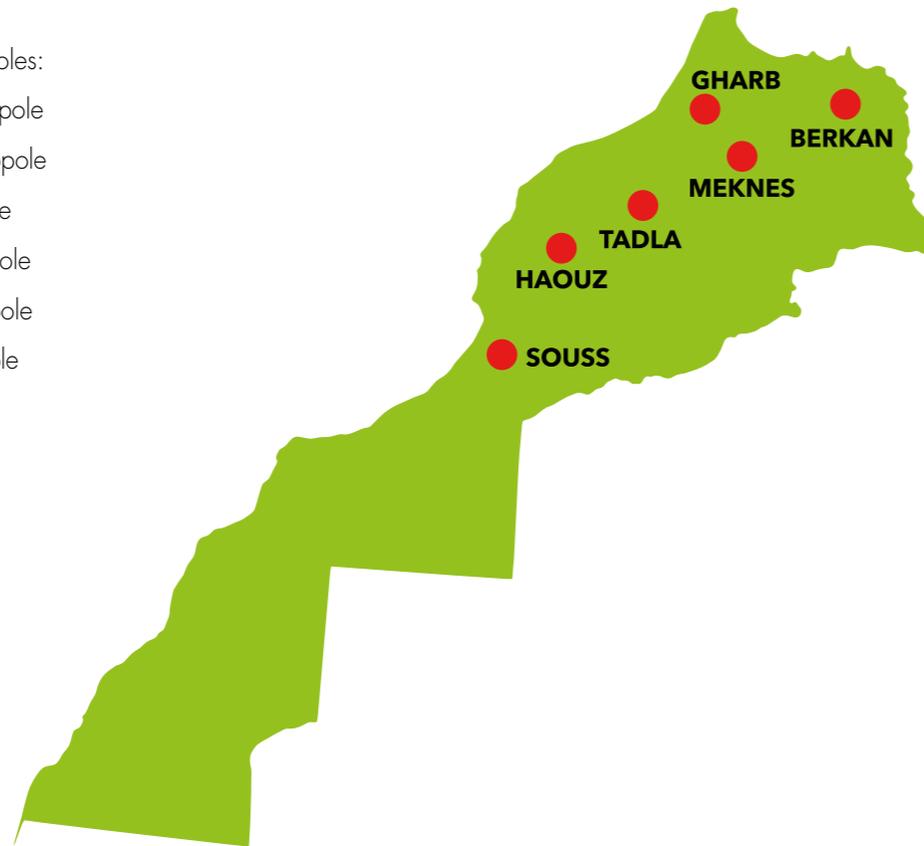
AGROPOLE

Agropole's creation is part of the Green Morocco Plan strategy which also aim to improve, in quantity and quality, the supply of agricultural raw materials for processing and export.

The agropole system provides an integrated offer including a business park of agribusiness and logistics activities, a development center for research and quality control, commercial & services platforms and a dedicated management structure.

There are six Agropoles:

- The Meknes Agropole
- The Oriental Agropole
- The Sous Agropole
- The Gharb Agropole
- The Haouz Agropole
- The Tadla Agropole

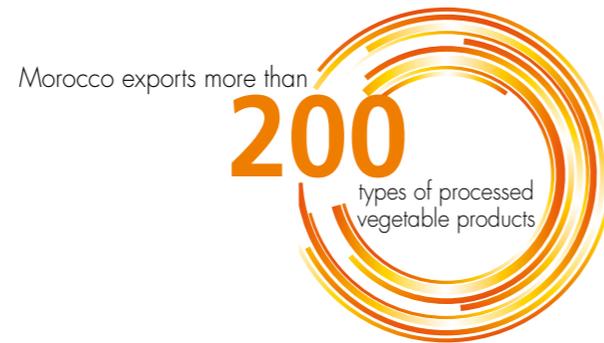


AGRO INDUSTRY SECTOR

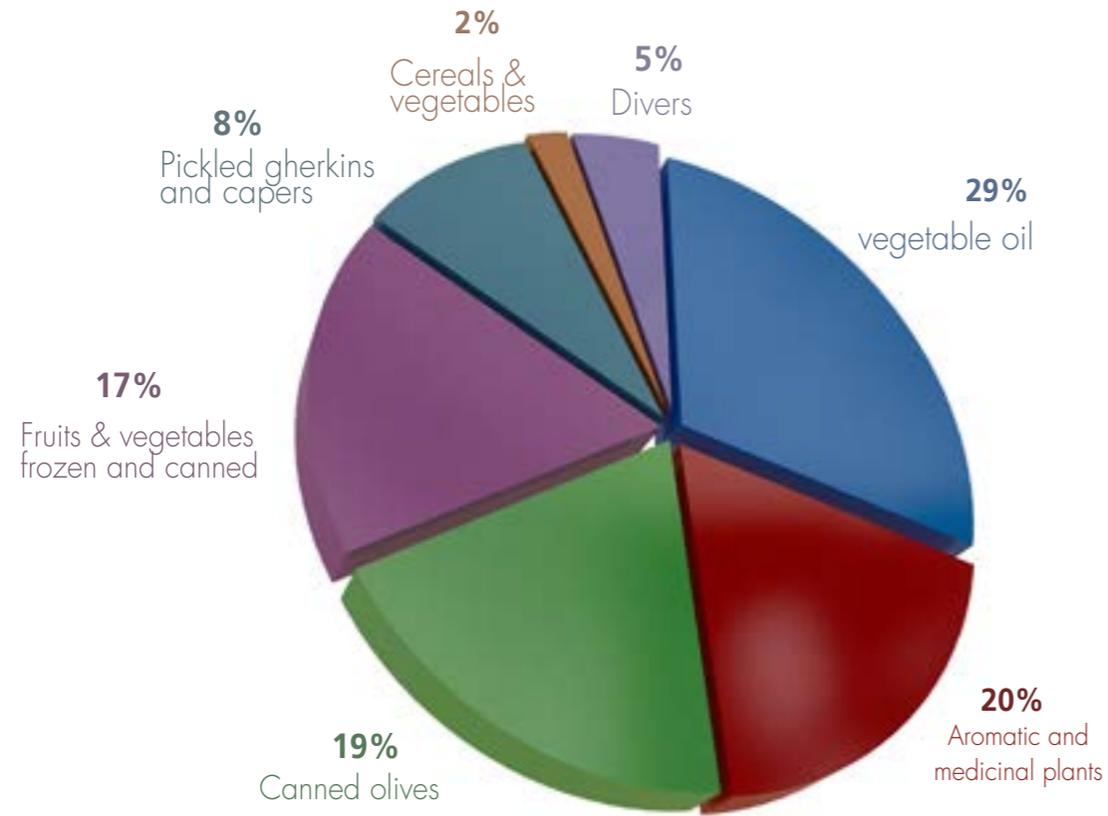
Thanks to the combined efforts of public authorities and private economic stakeholders, the Moroccan sector of agri-business has experienced a sustained growth over the last decade. Its contribution to gross domestic product has become important at the present time.

The sector demonstrates its full potential given the comparative advantages it enjoys, especially regarding the climate and crop biodiversity of Morocco, the quality of its human resources and free trade agreements with the European Union, the Arab countries and United States of America.

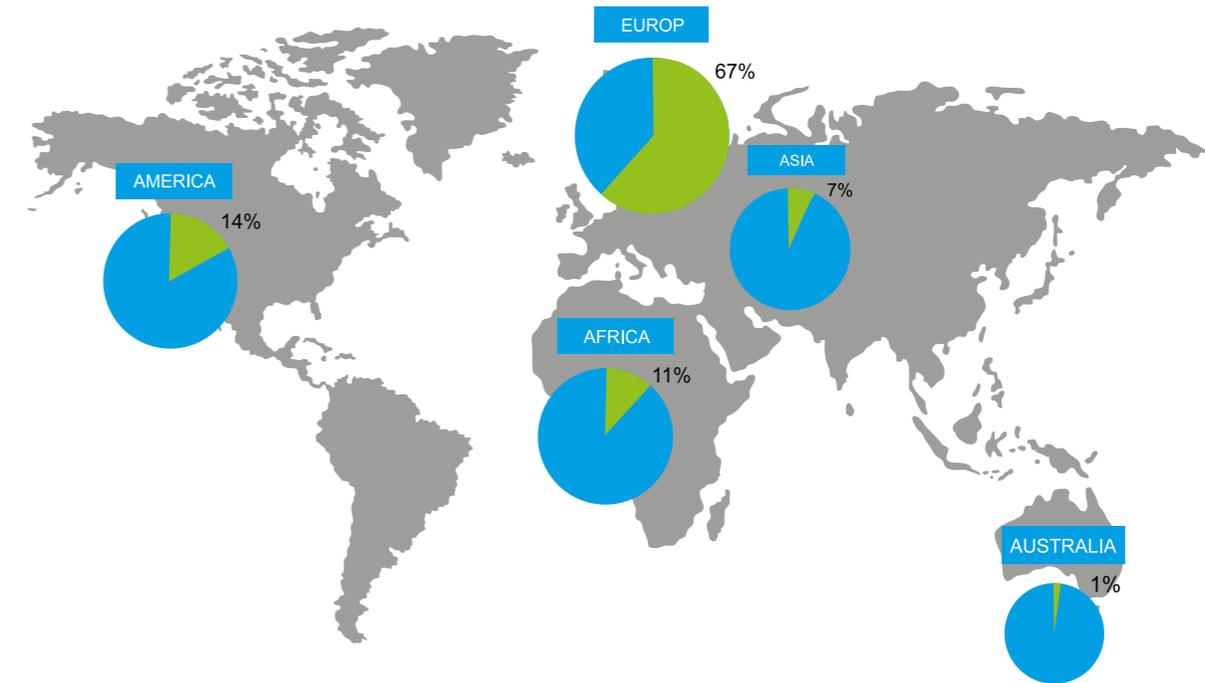
2015 EXPORT KEY FIGURES:



The main products exported during 2015 are vegetable oils, with a share of 29%, aromatic and medicinal plants followed by canned olives and frozen fruits and vegetables and canned with respective shares of 19% and 17%.



MOROCCAN AGRO-INDUSTRY PRODUCTS ARE EXPORTED TO 110 COUNTRIES AROUND THE WORLD



Regarding external markets, the European Union and North America receive more than 80% of Moroccan exports of processed vegetable products. France remains the main client of the Kingdom with a turnover of US \$ 120 million, followed by Spain and the United States of America.

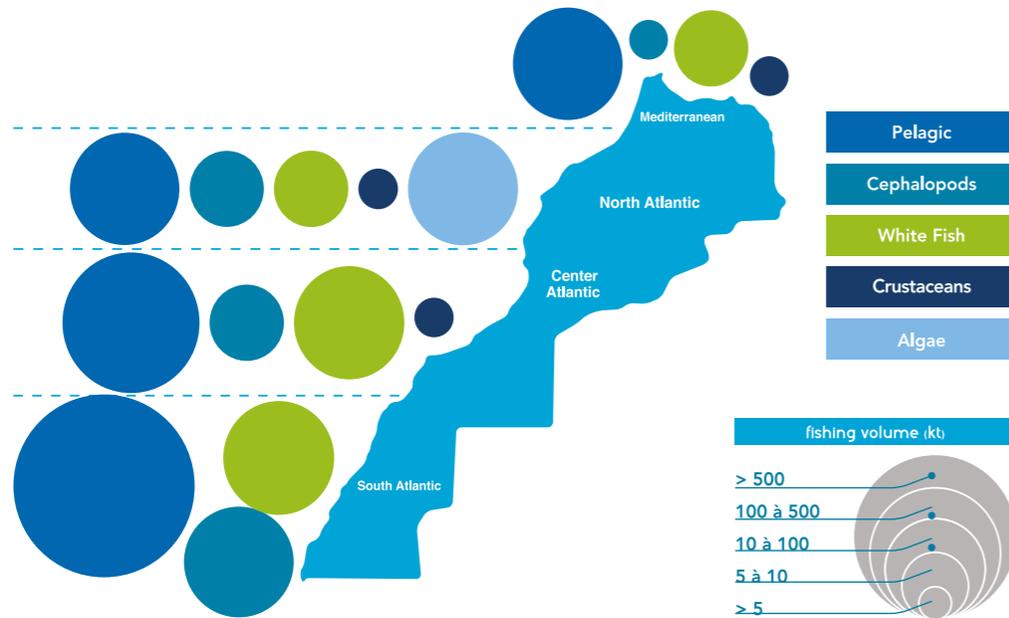


The Fisheries sector in Morocco

FISHING SECTOR IN MOROCCO

With more than 3500 km of coastline and a strategic geographical position, which stands as a crossroad of Canary cold currents combined with the Upwelling, Morocco displays an exceptional range of submarine ecosystems hosting a wide variety of fish, mollusks, crustaceans and shellfish.

Ranked among the richest fishing areas in the world, the Moroccan coast, with more than one million square kilometers of exclusive economic zone, ranks the Kingdom among the leading producers of seafood in the world. Morocco is the world's first exporter of sardines, including the *Sardina Pilchardus Walbaum 1792* species, internationally known and recognized.



A VITAL SECTOR

2,5%
Of national GDP

JOBS PROVIDER :

170.000

Direct jobs

490.000

Indirect jobs

A HIGH POTENTIAL IN EXPORT :

8,5%

Of total exports

44 %

Of agrifood exports

1st SARDINES EXPORTER WORLDWIDE :

Sardina Pilchardus Walbaum 1792, internationally known and recognized.

FISHING FLEET

Morocco has three types of operational fishing fleet:



Traditional fleet

15 594 small boats



Inshore fleet

1 725 coastal vessels



Offshore fleet

303 offshore vessels

PORT INFRASTRUCTURE

Morocco has 2 kinds of structures, spread over the entire territory, handling the disembarkation of Moroccan fisheries products:

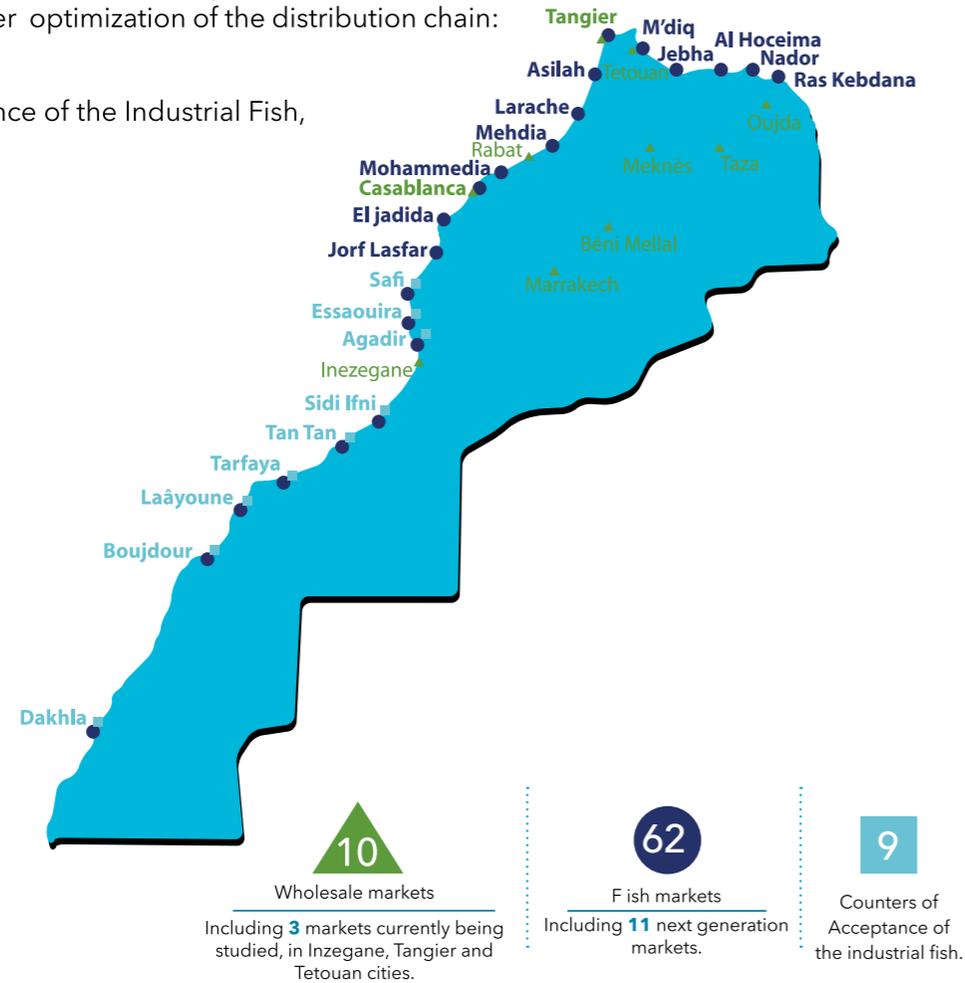
- Fishing ports,
- Equipped points;
 - *Equipped Landing Points,
 - *Fishing Villages.



COMMERCIAL INFRASTRUCTURE

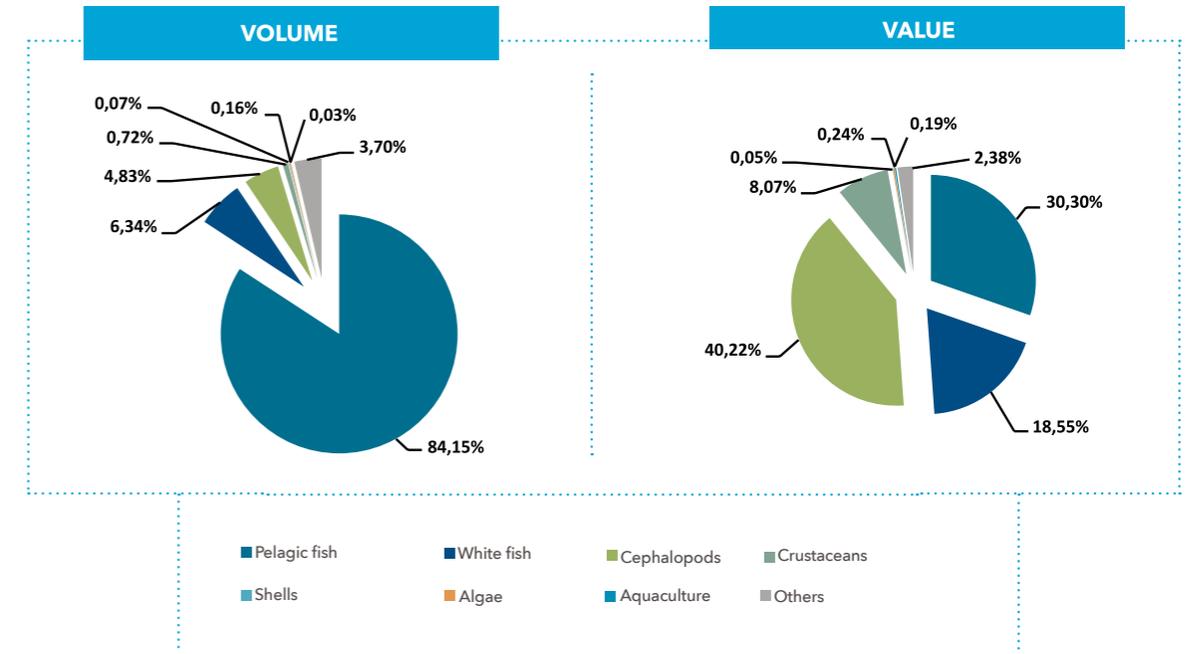
Morocco has 3 kinds of structures, spread over the entire country, ensuring better optimization of the distribution chain:

- Fish markets,
- Counters of Acceptance of the Industrial Fish,
- Wholesale markets.



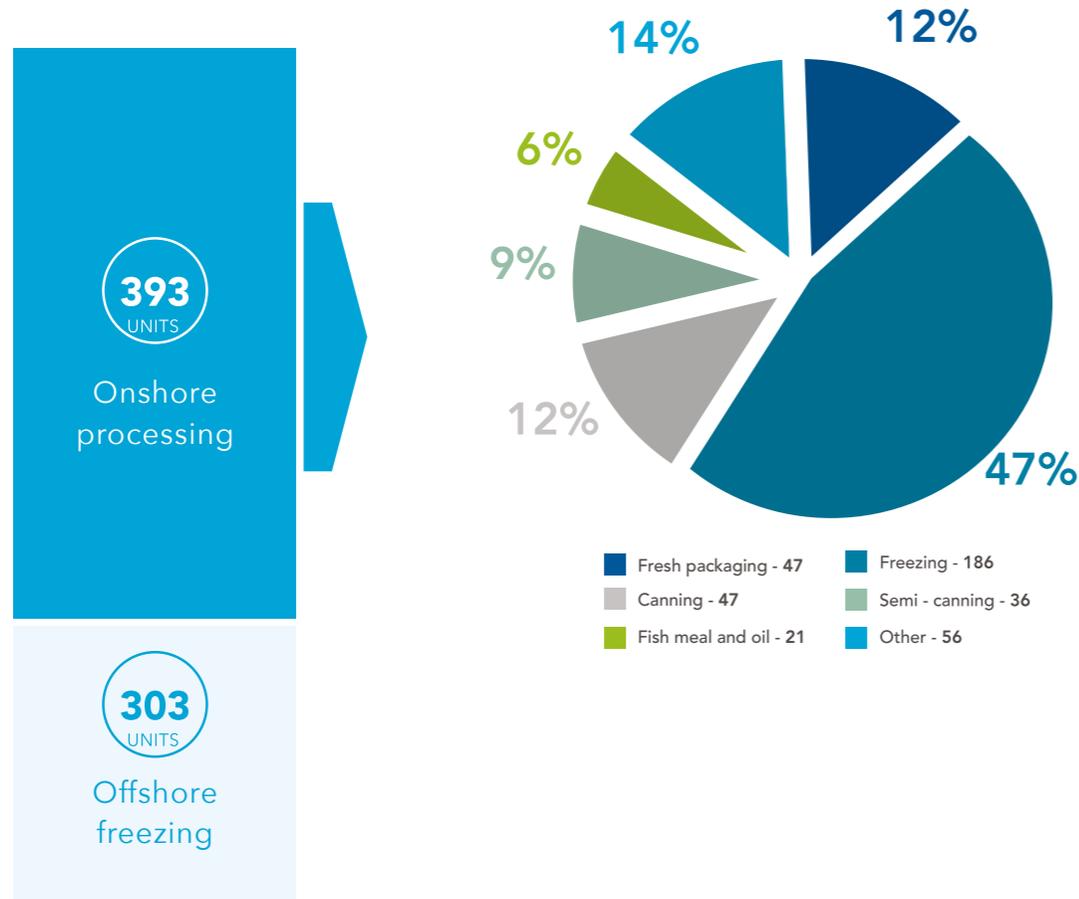
HALIEUTIC PRODUCTION

In 2014, the fishing production reached 1,65 million tons valued at more than USD 1 billion, distributed as follows:



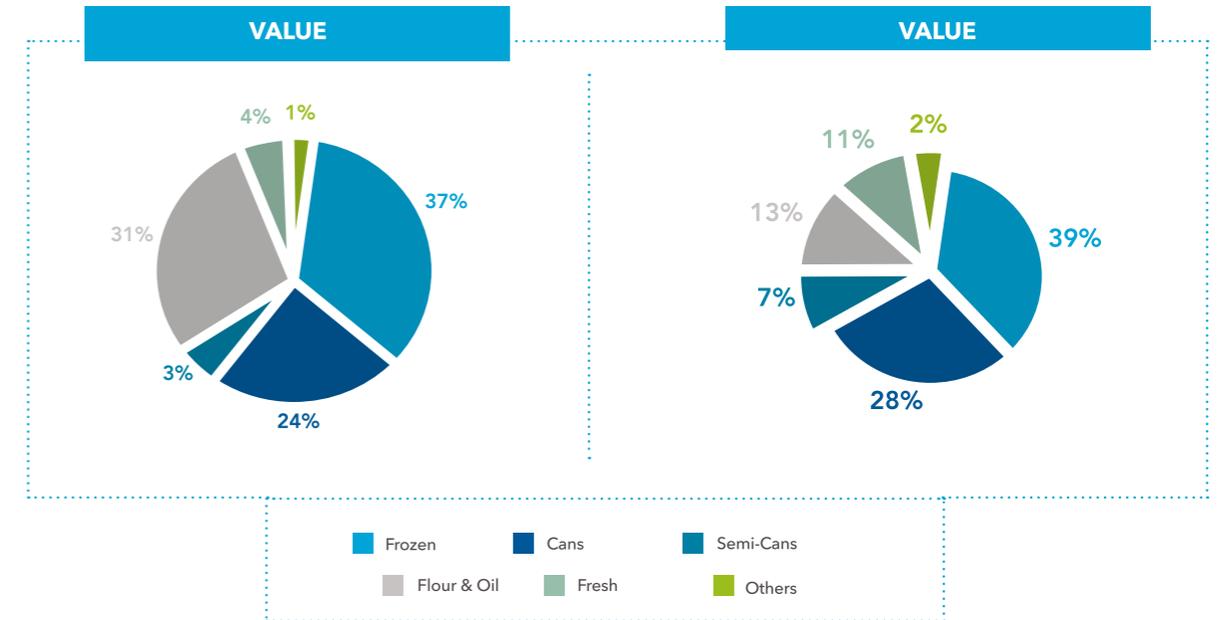
VALUATION INDUSTRIES

The fisheries processing sector in Morocco is composed of:



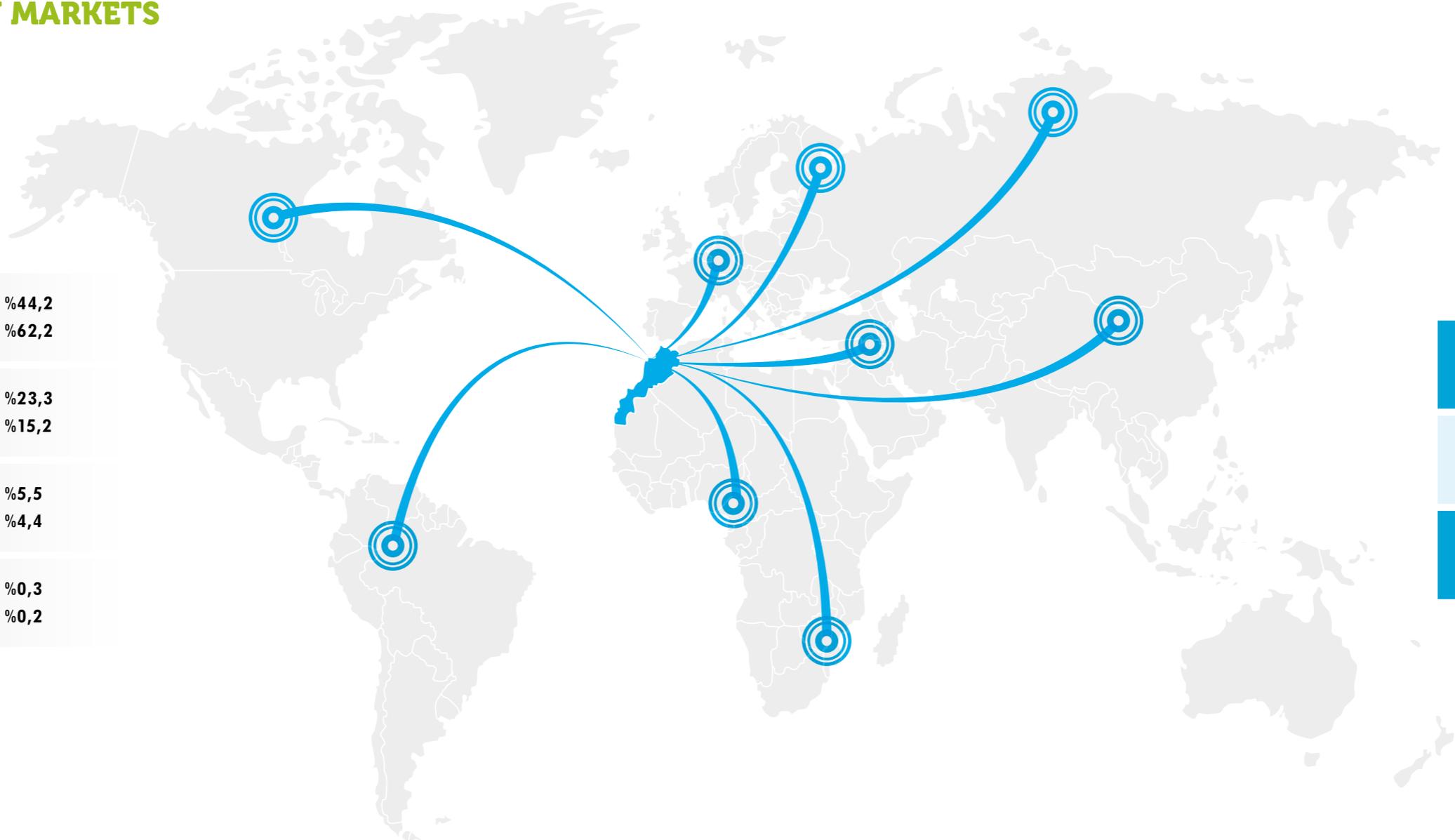
SEAFOOD EXPORT

In 2014, the Moroccan fisheries exports reached 590 264 tons, valued at USD 1,7 billion distributed as follows :



DESTINATION MARKETS

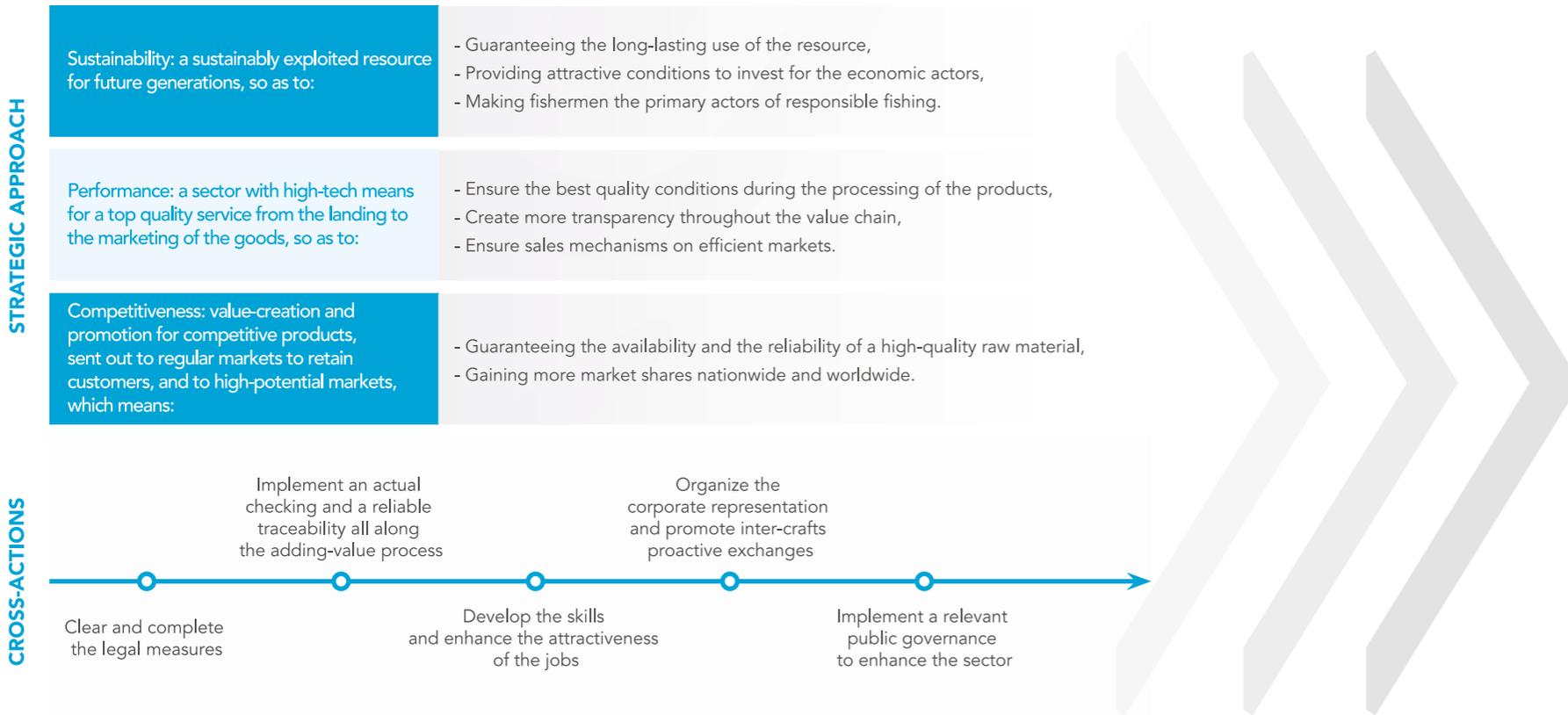
EU	Volume : %44,2 Volume : %62,2
AFRICA	Volume : %23,3 Volume : %15,2
AMERICA	Volume : %5,5 Volume : %4,4
OTHER	Volume : %0,3 Volume : %0,2



REST OF EUROPE	Volume : %16,2 Volume : %6,5
ASIA	Volume : %7,9 Volume : %9,0
MIDDLE EAST	Volume : %2,6 Volume : %2,5

HALIEUTIS PLAN

Since 2009, Morocco has adopted a strategy called HALIEUTIS, aimed for the development and competitiveness of the National fisheries sector. Developed in accordance with the strategic guidelines of His Majesty the King Mohammed VI, HALIEUTIS intends to build the sector into a real growth driver for the economic and social development of the Kingdom.



Based on the sustainable development of national fishery resources, its objective is to bring the Moroccan fishery products exports to USD 3,1 billion and to rise threefold the sector's GDP by 2020.



MOROCCAN SEAFOOD

As an implementation of the Halieutis plan, the Moroccan Seafood program, issued by the Ministry of Agriculture and Marine Fisheries, is dedicated to the institutional marketing and labeling of Moroccan sea products.



Promoting Moroccan sea products nationwide and worldwide, while supporting quality efforts undertaken by all the actors in the Moroccan fishing industry.

SUSTAINABILITY

Give prominence to the effort made in contribution to a sustainable management of the fishing sector in Morocco

SENSORY VALUE

Highlight the sensory assets of the Moroccan sea products (taste, look, texture)

MAKE THE FOREIGN CONSUMERS USE PRODUCTS OF MOROCCAN ORIGIN

AUTHENTICITY AND TRADITION

Promote the authenticity of the Moroccan halieutic species and value the traditional and the craft fishing methods

KNOW-HOW

Share about the know-how and the expertise of the Moroccan halieutic industry



**INSTITUTIONAL
ACTORS**

NATIONAL FOOD SAFETY OFFICE



The National Food Safety Office for Food Safety (ONSSA) is a public institution with its own legal personality and financial autonomy.

The ONSSA operates on behalf of the State in all the fields concerning the consumers' healthcare as well as the protection of healthiness for animals and vegetables.

The ONSSA applies the government policies and regulations regarding healthcare security as for the vegetables, the animals and the foodstuffs, from the raw materials up to the end-customer, including the animal feed.

ONSSA missions are :

- To assure the control and the sanitary protection of plants and animals species at the national level and at the borders,
- To assure the foodstuffs safety since the raw materials up to the end consumer, including the fishing products and the animal feed,
- To approve and check the inputs in agriculture (seeds, pesticides, fertilizer), the same goes for the veterinary medicines.

Address: Direction générale. Avenue hadj Ahmed Cherkaoui - Agdal. Rabat - Morocco

Phone: 00212 5 37 67 65 05 / 06 / Fax: 00212 5 37 68 20 49

Website: www.onssa.gov.ma

NATIONAL FISHERIES RESEARCH INSTITUTE



Created in 1996, the National Fisheries Research Institute (INRH), a reference in fisheries research in Morocco, undertakes all research activities, studies, experimental activities and offshore or onshore jobs that target the development and rationalization of managing fisheries resources and aquaculture as well as their valuation.

INRH is in charge of :

- Fishing resources stock-takings and monitoring of their use,
- Survey of the sea environment quality and safety,
- Study of the sea and shore ecosystems' functioning,
- Testing of new fishing techniques and upgrading of sea products,
- Research and participation in the Moroccan aquaculture growth.

Address: Route Sidi Abderrahmane Club équestre Ould Jmel. Casablanca - Morocco

Phone: 00212 5 22 94 07 73 / Fax: 00212 5 22 94 07 73

Website: www.inrh.ma

NATIONAL OFFICE OF FISHERIES



Created in 1969 as manager of the first-sale market of seafood, the National Office of Fisheries (ONP), is a major actor in the national fisheries sector in terms of promotion and marketing of the fishery products.

ONP is in charge of :

- Promoting the local whole sale consumption of sea products,
- Managing and handling the wholesale fish markets in compliance with the global standards for food safety and product quality,
- Approving the industrial fishing for supplying the onshore processing,
- Implementing promotion and upgrading programs for the modernization of that coastal fishing fleet still operating with traditional means.

Address: 13 rue du Lieutenant Mahroud Mohamed - 20300. Casablanca - Morocco

Phone: 00212 5 22 24 05 51 / 52 / Fax: 00212 5 22 24 23 05 / 22 24 36 92

Website: www.onp.co.ma

NATIONAL AQUACULTURE DEVELOPMENT AGENCY



Created in 2011, the National Agency for the Development of Aquaculture (ANDA) aims to promote the development of national aquaculture.

ANDA is in charge of :

- Implementing the government measures and policies regarding aquaculture,
- Proposing specific action plans in line with the guidance given by the national strategy dedicated to the fishing sector and by the relevant regulatory framework,
- Promoting the aquaculture activity and developing the trade of the aquaculture products on both local and global markets.

Address: Avenue Annakhil, Immeuble les Patios, 4ème étage, Hay Ryad. Rabat - Morocco

Phone: 00212 5 38 09 97 00 / Fax: 00212 5 38 09 97 70

Website: www.anda.gov.ma



FOOD EXPORT CONTROL AND COORDINATION ORGANIZATION



The Food Export Control and Coordination Organization (EACCE) started operating as from 1986 as a public body in the service of the food-processing sector for the products intended to be exported. As such, its scope of intervention covers as well the fresh fruits and vegetables, the processed products and the sea products.

EACCE missions:

The Food Export Control and Coordination Organization (EACCE) has been created in 1986. Since then, its main missions involve the promotion of agricultural and marine export-oriented products, considering them as pillars of the country's economic growth.

The EACCE missions are:

Technical control:

- Performing technical control of Moroccan agricultural and marine food products aimed for export.

Exports coordination:

- Animating sectoral specialized coordinating committees for exports of Moroccan agricultural and marine food products,
- Ensuring respect of the technical requirements referring to the various conventions related to export of Moroccan agricultural and marine food products.

Exports promotion:

- Contributing in the promotion of the image and quality of Moroccan agricultural and marine food products in foreign target markets,
- Organizing, setting up and participating in events or actions aimed at the promotion and development of Moroccan agricultural and marine food products exports, in Morocco and abroad.

Sectoral monitoring:

- Providing operational strategic watch on export markets for Moroccan agricultural and marine food products,
 - Supporting small enterprises exports for the qualification and development of products intended for export.
- The EACCE has also 4 delegations in Europe that contribute to the technical surveillance and coordination processes by sending information on the status of the arrival of exported goods and their compliance to quality standards. They also track the products from competitors states. This not forgetting the providing of strategic information for the benefit of Moroccan agricultural and marine food products intended for exports.

Address: 72, Angle Bd Med Smiha et Rue Med El Baâmarani, Casablanca, Morocco

Phone: 00212 5 22 30 51 04 / Fax: 00212 5 22 30 25 67

Website: www.eacce.org.ma



Food Exports Control And Coordination Organization

72, Angle Bd Med Smiha et Rue Med El Baâmarani, Casablanca, Morocco

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