MACROECONOMIC AND AGRICULTURAL INDICATORS[1]

	UNIT	2000	2005
POPULATION			
Total population	Millions	29.23	31.48
Rural population	Millions	13.02	12.98
Percentage rural/total population	%	44.50	41.20
Total labour force (TLF)	Millions	11.78	12.67
Agricultural labour force (ALF)	Millions	4.25	4.29
ALF/TLF	%	36.09	33.83

	UNIT	2000	2003
PRODUCTION			
Gross domestic product per inhabitant (GDP/Hbt)	$	1 145	1 431
Agricultural GDP/GDP	%	13.53	18.34
FACTORS OF PRODUCTION			
Area under cultivation	1 000 ha	9 652	9 283
Irrigated area	1 000 ha	1 305	1 345
Area under cultivation/tractor	ha	209.37	189.43
AGRICULTURAL TRADE			
Agricultural imports	Million $	1 668	1 668
Agricultural exports	Million $	695	990
Agricultural exports/total exports	%	9.36	11.37
Agricultural imports/total imports	%	14.45	11.77

[1] Source: Med Agri 2005 and UN Population Statistics 2006.

OLIVE GROWING IN MOROCCO

The olive is the principal fruit tree cultivated in Morocco where it has spread across virtually the whole of the country owing to its ability to bear crops in a variety of growing conditions and its adaptability to highly adverse soil and climatic conditions.

1. Historical background

Historical research into the beginnings of olive growing in Morocco, backed by the remains found at Phoenician and Roman sites (Volubilis and Lixus), reveal that it dates back to the first millennium B.C.; oil mills and vessels are tangible evidence of its ancient historical origin, which is tied up with the colonisations of the Mediterranean cultures. For centuries, olive oil was Morocco's main source for covering edible oil requirements. It was only in the 1960s when consumption started to diversify, switching to other vegetable fats. Nowadays, seed oils account for more than 85% of all the edible oils consumed in Morocco, almost 70% of which are imported.

For this reason, the authorities are now going to great lengths to develop the sector in order to satisfy domestic consumption requirements of edible oils and to attenuate the reliance on foreign imports.

2. Socio-economic importance

The olive sector has a vital socio-economic role and plays an active part in stemming rural depopulation by:

- providing almost 20 million workdays;
- providing permanent employment for 60 000 people;
- providing a livelihood for two million people;
- covering 16% of Morocco's consumption requirements in edible vegetable oils;
- helping to strike an equilibrium in the balance of trade by generating the equivalent of one thousand million dirhams in foreign currency earnings on exports of table olives and olive oils. This places Morocco in second place in the world ranking of table olive exporters, after Spain;
- helping to develop marginal land and to protect the environment.

Olive oil output, which averaged 60 000 t during the period from 2000/01 to 2003/04, can vary by around 5.5% owing to the alternate bearing pattern of the olive tree.

3. Resources and location

Nowadays, Morocco has nearly 600 000 ha of olive orchards, which represent 6% of the country's cultivated area, compared with 128 500 ha in the early 1960s. Of this area, 220 000 ha (36.7% of the total) are irrigated and 380 000 ha (63.3%) are rainfed. Only 40 000 ha are under perennial irrigation.

Two types of irrigation are practised: perennial irrigation in the olive-growing areas covered by the Regional Agricultural Development Boards, such as Haouz, Tadla, Errachidia, Souss-Massa, etc., and supplemental irrigation, which is located primarily in the regions of Marrakech, Beni Mellal, Azilal, Taza, El Kelâa, Boulemane, Oujda and Nador.

In 2005/06, the total area under olives was estimated to come to 600 000 ha compared with 590 000 the season before. Crop area has increased at an average annual rate of 2.64% and is divided amongst mountainous areas (230 000 ha), irrigated areas (220 000 ha) and rainfed areas. The potential for the expansion of olive growing by 2010 is evaluated at 400 000 ha. Through the implementation of nationwide olive development programmes, some 2.5M olive trees were expected to have been planted by the end of 2006.

Olive orchard expansion is located in the regions of Haouz-Tadla (16%), Taza (12%), Oriental (11%), Khémiset (10%), Saïs (8%), Chefchaouen (5.5%) and Ouezzane (3%). In addition, there is scope for converting rainfed areas traditionally dedicated to cereal growing.

In 2003, there were 400 000 agricultural holdings with olive orchards, almost 75% of which were under 5 ha.

As far as the possibilities of mechanisation are concerned (cultural practices and harvesting), 360 000 ha (60%) are partially mechanisable while 210 000 ha (40%) cannot be mechanised.

Three categories emerge when olive resources are itemised by orchard age:

- Young orchards (< 5 years old): 85 000 ha (14%)
- Orchards at full bearing (5–50 years old): 424 500 ha (71%)
- Old orchards (> 50 years old): 90 500 ha (15%)

Although the olive is cultivated throughout the country, the geographical breakdown of orchards reveals that there are three major areas, specifically:

North: Chefchauen, Taounate and Ouezzane where the soils are poor, the terrain is rough and the rainfall is 1 000 mm/year.

Centre: Taza, Fez and Meknes where the soils are rich and deep, the terrain is not very rough and the rainfall is between 450 and 500 mm/year.

South: Haouz, Tadla, Safi and Essaouira where the soil is quite rich, the terrain is flat, the rainfall is less than 400 mm/year and orchards receive perennial or supplemental irrigation.

The olives grown in Morocco mainly belong to the 'Picholine marocaine' population variety, which accounts for over 96% of the country's olive assets. The remaining 4% is made up of the 'Picholine du Languedoc', 'Dahbia' and 'Meslala' varieties, which are grown on irrigated land (Haouz, Tadla, El Kelâa), and some Spanish and Italian varieties such as 'Picual', 'Manzanilla' 'Gordal' and 'Frantoio'. The 'Picholine' variety is well suited to the soil and climatic conditions of Morocco. It is a hardy, dual-purpose variety and its start of bearing is intermediate. Its productivity is high but alternating and it gives a middling oil yield at the mill (20%). The oil it produces is excellent in quality and has a high oleic acid content.

The National Agricultural Research Institute began surveying this variety a few years ago under its varietal improvement programme in order to select the top performing clones. This work has led to the selection of two worthwhile clones, called 'Haouzia' and 'Menara', which are currently being disseminated.

4. Production and yield

Moroccan production of olive oil fluctuates widely from year to year although the general trend is upwards as the mean of 22 900 t recorded in the 1970s has risen to the current average of 60 000 t. However, in the 1990s, olive oil production performance varied, averaging 41 800 t in the first half of the decade, then climbing to 64 000 t in the second, which works out at a large 53% increase.

This rise in olive oil production from 1960 onwards is basically due to greater acreage rather than to higher productivity. Review of the changes in acreage since 1960 reveals that the rate of average growth was around 7 600 t/year in the period 1960–1986; this rate then went up to 19 000 h/year in 1990–1999 and currently stands at 15 000 h/year.

Analysis of production performance during 2004/05 (50 000 t) compared with the four preceding seasons shows that Morocco produced a mean of 60 000 t during this period, falling slightly short of the average for the 1990s, probably due to the negative impact of the major drought in Morocco in recent years. This same circumstance explains the wider band of fluctuation with respect to the mean value (minimum of 35 000 t in 2000/01 (-42%) and maximum of 100 000 t in 2003/04 (+67%).

The figures for 2005/06 shows a good assessment for production – 75 000 t – in keeping with the alternate bearing pattern of the olive.

When looking at yields, a distinction has to be drawn between rainfed and irrigated crop. Yields on rainfed orchards, located mainly in the olive-growing regions of the North and Centre, oscillate between 800 and 1500 kg/ha. Under irrigated conditions – the case of olive orchards in the South – yields range from 1 600 to 2 000 kg/ha, and can even reach 3 000 kg/ha when permanent irrigation is applied.

5. Processing sector

In the processing sector traditional oil mills (*maâsras*) and large-scale or medium-scale facilities exist side by side.

The traditional segment of the sector comprises 16 000 olive oil mills with the capacity to crush some 170 000 t of olives per year. Oil extraction rates are low, barely exceeding 14%.

The modern and semi-modern segment of the sector is made up of 334 facilities equipped with an aggregate capacity of roughly 530 000 t of olives per year, and with substantial room for increase.

Owing to obsolete, antiquated equipment some mills still produce lampante grade oils which require refining to be made fit for human consumption. Other reasons are the poor quality of the olive fruits (due to pests and disease or to damage during pole harvesting) and their perishable nature, which is accentuated by the fact that the olives are transported in bulk and sometimes stored for a long time prior to crushing.

This combination of factors has a very negative impact on product quality since 60% of the oils produced are lampante grade (compared with an earlier share of 80%) whereas no more than 5% can be considered extra virgin product.

6. Marketing

Domestic production of fluid edible vegetable oils amounts to about 100 000 t, approximately half of which are olive oils.

The seed oil market is fully regulated and prices are set by the authorities. As some 330 000 t of seed oils are consumed (average for the 1998/99–2001/02 crop years) Morocco needs to import. Average imports during the same period came to some 330 000 t, worth two thousand million dirhams, which means that Morocco depends on foreign supplies to cover over 80% of its demand.

Mainly soybean oil (88%) and sunflower oil (9%) are imported. To stimulate production of these oils, the Administration has set a subsidy for sunflower seed production of MAD 1 910/t, which is the difference between the domestic price and the price on the world marketplace; the Compensation Fund guarantees this intervention.

By contrast, the olive oil market is free and prices swing widely from year to year in step with the volume of production and export opportunities. The retail price of a litre of olive oil varied between MAD 25 and 35, then rising to MAD 47 at the beginning of 2006.

Between 1960 and 1979, olive oil exports amounted to 9 200 t/year, i.e. around 34% of mean production for the period, later declining in the 1990s when they averaged 8 200 t/year (15.5% of mean production for that period). The free trade agreement recently signed with the United States is expected to facilitate olive oil and table olive exports to the US.

Imports are not very high, averaging no more than 1 400 t/year through the 1990s. An increase was observed, however, in the four years between 2000 and 2003, probably to offset the low level of production at the time. In 2002/03 specifically, Morocco had to import 10 500 t of olive oil owing to low home production, but in 2004/05 and 2003/04 the situation was reversed and it exported 10 000 t and 20 500 t respectively.

Olive oil consumption averaged 45 500 t/year through the 1990s and, like production, behaved differently in the first and second halves of the decade. In the first half, the mean was 42 900 t/year, whereas in the second consumption averaged 11.9% higher at 48 000 t/year. Analysis of the mean consumption figures for the four seasons from 2000/01 to 2003/04 reveals an annual figure of 58 000 t, up by 13 000 t on the decade average and representing an increase of 29.2%.

Per capita consumption is quite low, lying at an average of 1.9 kg during the period 2000/01–2003/04.

7. Table olive subsector

Approximately one-quarter of the olives grown in Morocco go for processing as table olives.

With its mean table olive production standing at 93 000 t/year in the seasons between 2000/01 and 2003/04 (6% of the world total), Morocco was fourth in the world production league, positioned behind Spain, Turkey, Syria and Egypt. This tonnage contrasts with the mean production figure for the 1960s, which came to no more than 39 000 t/year.

Morocco is also the world's second biggest exporter of table olives, only beaten by Spain. During the period 2000/01–2003/04 it exported an average of 61 300 t/year (14.3% of the total). This showed an increase of almost 4% on the average for the 1990s (59 000 t) and brought in foreign currency earnings worth MAD 900 million per annum. Exports in 2005/06 were assessed at 68 000 t, up by 11% on the four-year average and by 5.5% on the season-before level.

On the consumption front, the tonnage dropped from a yearly average of 34 600 t in the first half of the 1990s to 25 300 t in the second (-26.9%). The consumption average levelled off at around 29 800 t in the seasons between 2000/01–2003/04 thanks to the bumper harvest of 2003/04 (120 000 t). The provisional figures for 2004/05 and 2005/06 assess consumption at 29 000–30 000 t, which gives a per capita consumption figure of no more than 1 kg.

To sum up, the second part of the 1990s and early 2000s confirmed the expansion of production (+6.15%) and the increase of exports (+41.11%) at the expense of consumption (-39.21%), as can be seen from the table below:

	Average (t) 1990/91-1993/94	Average (t) 1998/99-2001/02	Change %
Production	81 250	86 250	6.15
Consumption	34 750	21 125	- 39.21
Exports	48 000	67 750	41.11

8. National Olive Plan

Morocco has set in place a twelve-year National Olive Plan (NOP: 1998–2010) to cope with the growing demand for vegetable oils, to increase local supply and to reduce reliance on imports by tapping natural potential to the maximum while seeking economic returns for the olive oil production and processing sector.

The goals of the NOP are to double the agricultural resources existing at the end of the 1990s in order to achieve an area of 1 million ha by 2010, and to improve existing resources in order to secure suitable returns on 260 000 ha of land where there is room for improvement (roughly 50% of current crop area), at an average yearly rate of almost 22 000 ha/year.

The Plan entails an aggregate investment of 400 million olive trees, at a total cost of MAD 4 thousand million. The State is to finance 37% of this amount (MAD 1.5 thousand million) and farmers and olive oil processors are to fund the remaining 63% (MAD 2.5 thousand million).

Modernisation schemes are planned for the olive oil industry. These entail:

- Awarding aid for investing in the installation and modernisation of mill processing equipment;
- Making available small continuous-process olive oil extraction units to olive oil cooperatives.

Incentive measures to speed up the integration and development of the sector include:

- supplying farmers with State-subsidised (80%) certified olive plants;
- granting investment premiums for the creation of intensive olive-growing areas at rates of MAD 2 600/ha (irrigated) and MAD 1 800/ha (rainfed);
- defraying the cost of creating uniform olive-growing areas in disadvantaged areas suited to olive cultivation;
- granting an investment premium of MAD 2 000/ha and a subsidy of 30% of the cost of any localised irrigation project;
- granting an investment premium of MAD 5 000/ha for processing units with a capacity of less than 50 t/day and MAD 3 500/t for units with a capacity of more than 50 t/day;
- creating a panel for tasting virgin olive oils.

OLIVE SECTOR PROFILE[1]

I. STATISTICS

A. Statistics on production of olive oils, table olives and other edible oils

1. Olive orchard area and yields

a. Changes in area under olives (ha):

Year	Area planted during the year	Area grubbed during the year	Total area
	Dual-purpose trees		Dual-purpose trees
1996	25 000	--	480 000
1997	25 000	--	500 000
1998	15 000	--	520 000
1999	15 000	--	540 000
2000	15 000	--	550 000
2001	15 000	--	560 000
2002	15 000	--	570 000
2003	15 000	--	580 000
2004 (estimates)	15 000	--	590 000
2005 (estimates)	15 000	--	600 000

N.B.: Planting success rate: 70–80%.

[1] Replies to IOC Executive Secretariat questionnaire.

b. Total area dedicated to olive growing in 2004/05 (ha):

Crop	Total area (excluding abandoned orchards)			Bearing area		
	Dry-farmed	Irrigated	Total	Dry-farmed	Irrigated	Total
Table olives	--	--	--	--	--	--
Oil-olives	--	--	--	--	--	--
Dual-purpose olives	380 000	220 000	600 000	275 000	190 000	450 000
Total	**380000**	**220 000**	**600 000**	**275 000**	**190 000**	**450 000**

c. Average orchard density (no. olive trees/ha):

Type of growing	Dual-purpose trees
Irrigated	100
Dry-farmed	160

d. Breakdown of olive-growing area, by tree age bracket, in 2004/05:

Age	Area (ha)	%
< 5 years old	85 000	14
5–15 years old	158 000	26
16–50 years old	266 500	45
> 50 years old	90 500	15
Total	**600 000**	**100**

e. Average production yield (kg olives/ha):

Type of tree	2000/01 crop year	2001/02 crop year	2002/03 crop year	2003/04 crop year	2004/05 crop year
Dual-purpose olives	760	1 070	790	1 500	850

2. Production sector

a. Number of agricultural holdings growing olive trees in 2003:

Olive crop area on holding	No. of holdings	Total olive crop area (ha)
< 1 ha 1–5 ha	296 00	NA
6–10 ha 11–20 ha	92 000	NA
21– 50 ha > 50 ha	12 000	NA
Total	**400 000**	**580 000**

NA: Information not available.

b. Possibilities of mechanisation (cultural practices and harvesting):

Heading	Area (ha)	%
Can be fully mechanised	--	--
Can be partially mechanised	360 000	60
Cannot be mechanised	210 000	40

c. Share of the olive sector (olive oils and table olives) in the final agricultural production of the country in 1999–2002 (excluding stockfarming products):

Heading	1999	2000	2001	2002
Olive sector (%)	5.9	5.5	5.2	5.3
Final agricultural production	**100**	**100**	**100**	**100**

d. Production infrastructure:

Units	Number	Average production capacity (t/yr)
Traditional oil mills	16 000	170 000
Oil mills with presses or super-presses	334	530 000
Continuous-process oil mills (two or three-phase)		
Dual units (oil + olives)	21	64 000
Table olive processing plants	47	76 500
Olive-pomace oil extraction plants	2	50 000
Seed oil extraction plants	1	300 000
Edible oil refineries	10	350 000

3. Domestic production of fluid edible vegetable oils and table olives

a. Olive oil and table olive production (t):

Crop years	Production of virgin olive oil	Production of table olives
1996/97	80 000	100 000
1997/98	50 000	85 000
1998/99	65 000	95 000
1999/00	40 000	80 000
2000/01	35 000	80 000
2001/02	60 000	90 000
2002/03	45 000	80 000
2003/04 (prov.)	60 000	90 000
2004/05 (prov.)	65000	95 000

b. Olive oil production, by grade, during five crop years:

Grades	1998/99 crop year		1999/00 crop year		2000/01 crop year		2001/02 crop year		2002/03 crop year	
	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%
Extra, up to 1°	1 300	2	800	2	700	2	1 200	2	900	2
Virgin, 1°– 2°	1 950	3	1 200	3	1 050	3	1 800	3	1 350	3
Ordinary, 2°– 3.3°	9 750	15	6 000	15	5 250	15	9 000	15	6 750	15
Lampante, > 3.3°	52 000	80	32 000	80	28 000	80	48 000	80	36 000	80
Total	**65 000**	**100**	**40 000**	**100**	**35 000**	**100**	**60 000**	**100**	**45 000**	**100**

c. Total table olive production, by type, during five crop years:

Quantities	1998/1999 crop year		1999/2000 crop year		2000/01 crop year		2001/02 crop year		2002/03 crop year	
	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%	Quantities (t)	%
Green table olives[3]	40 00	42.1	36 000	45	30 000	37.5	37 000	41.1	30 000	37.5
Table olives turning colour	9 000	9.5	4 000	5	4 000	5.0	6 000	6.7	5 000	6.3
Black table olives	46 000	48.4	40 000	50	46 000	57.5	47 000	52.2	45 000	56.2
Total	**95 000**	**100**	**80 000**	**100**	**80 000**	**100**	**90 000**	**100**	**80 000**	**100**

d. Crop area and domestic production of sunflower seed oils:

	2000	2001	2002
Area (ha)	49 000	60 500	45 000
Seed production (t)	19 000	27 000	16 400
Oil production (t)	7 600	10 800	6 560

4. Cost prices during the 2002/03 crop year (MAD/kg)[1]

a. Production and processing of oil-olives:

Place	Headings	Amount
Holding	Average production cost of oil-olives	MAD 1.66/kg
	Average producer price paid for oil-olives	MAD 2.50–4/kg
	Direct production aid or subsidy	--
Oil mill	Average processing cost of oil-olives	MAD 0.46–0.52/kg
	Average producer price paid for virgin olive oils	MAD 22–27/L
	Direct processing aid or subsidy	--

b. Production and processing of table olives:

- **On the holding:**

Headings	Green olives	Olives turning colour	Black olives	All types together
Average processing cost of table olives	--	--	--	MAD 1.76/kg
Average producer price paid for table olives	--	--	--	MAD 3.50–5.00/kg
Direct processing aid or subsidy	--	--	--	--

- **At the processing plant:**

Headings	Green olives	Olives turning colour	Black olives	All types together
Average processing cost of table olives	--	--	--	MAD 2.30/kg
Average producer price paid for table olives	--	--	-	MAD 10–13/kg
Direct processing aid or subsidy	--	--	--	--

[1] EUR 1 = MAD 10.55 (Moroccan dirhams).

5. Employment generated by the olive sector (workdays)

Employment	1998/99 crop year	1999/00 crop year	2000/01 crop year	2001/02 crop year	2002/03 crop year
Olive growing	--	--	--	--	--
Olive oil industry	--	--	--	--	--
Total	11 million	12 million	13 million	14 million	15 million

In 2004/05 the olive sector generated 20 million workdays.

B. Statistics on consumption and trade

1. Domestic consumption

a. Quantities consumed of olive oils, olive-pomace oils and other fluid edible vegetable oils (FEVOs):

- **Total quantities consumed (t):**

Headings	1998/99 crop year	1999/00 crop year	2000/01 crop year	2001/02 crop year	2002/03 crop year
Virgin olive oils consumed by producer households	17 000	13 000	12 000	16 000	13 000
Virgin olive oils sold loose	25 000	29 000	22 000	30 000	25 000
Packed olive oils	13 000	13 000	11 000	14 000	12 000
Packed olive-pomace oils	500	500	500	500	500
Olive oils used in the food processing industry	--	--	--	--	--
Olive-pomace oil used in the food processing industry	3 000	3 500	3 000	3 500	2 000
Total olive oils and olive-pomace oils consumed	**58 500**	**59 000**	**48 500**	**64 000**	**52 500**
Seed oils for direct consumption	--	--	--	--	--
Seed oils used in the food processing industry	--	--	--	--	--
Total seed oils consumed	**340 000**	**300 000**	**380 800**	**300 000**	**300 000**
Grand total of FEVOs consumed	**398 500**	**359 000**	**429 300**	**364 000**	**352 000**

b. Total quantities of table olives consumed (net drained weight):

- **Total quantities consumed (t):**

Headings	1998/99 crop year	1999/00 crop ye ar	2000/01 crop year	2001/02 crop year	2002/03 crop year
Table olives consumed by producer households	--	--	--	--	--
Bulk table olives					
Packed table olives	--	--	--	--	--
Table olives used in the food processing industry	--	--	--	--	--
Total	**20 00**	**21 000**	**21 000**	**22 000**	**21 000**

c. Quantities of other fluid edible vegetable oils consumed (FEVOs) (t):

Oils	1999	2000	2001	2002	2003
Soybean oil	255 000	228 000	337 000	270 000	270 000
Cottonseed oil	--	--	--	--	--
Sunflower oil	67 000	50 000	40 000	24 000	29 500
Rapeseed oil	9 000	18 000	500	2 500	--
Other oils	9 000	4 000	3 300	3 500	500
Total FEVOs	**340 000**	**300 000**	**380 800**	**300 000**	**300 000**

d. Consumption of oils and table olives per head (kg/head):

Edible oils and table olives	1999	2000	2001	2002	2003
Olive oil	1.83	1.83	1.50	2.00	1.67
Olive-pomace oil	0.12	0.13	0.12	0.13	0.08
Other edible oils (FEVOs)	11.30	10.00	12.70	10.00	10.00
Table olives	0.70	0.70	0.70	0.73	0.70

N.B.: The figures provided are for apparent consumption as opposed to actual consumption, which is normally calculated on the basis of household surveys.

2. Trade in edible oils and table olives:

a. International trade:

- **Trade in olive oils (t):**

Imports/exports	2000	2001	2002	2003	2004	2005
Imports of olive oils	4 000	4 578	4 700	10 500	1 500	0
Imports of olive-pomace oils	1 200	806	19			
Exports of olive oils	500	84	701	3 000	20 500	10 000
Exports of olive-pomace oils	300	22	826			

- **Trade in other fluid edible vegetable oils (t):**

Imports/Exports	1997	1998	1999	2000	2001	2002
Soybean oil imports	--	161 600	255 600	229 620	339 150	189 600
Sunflower oil imports	--	37 200	51 000	16 270	16 890	18 890
Rapeseed oil imports	--	37 700	6 200	6 000	730	1 480
Imports of other oils	--	13 500	13 580	350	4 260	1 823
Total FEVO imports	**282 600**	**250 000**	**326 380**	**252 240**	**361 030**	**211 793**
Soybean oil exports	--	--	30	50	190	2744
Sunflower oil exports	--	--	--	--	10	--
Rapeseed oil exports	--	--	--	--	--	14
Exports of other oils	--	1 200	130	--	--	1
Total FEVO exports	**--**	**1 200**	**160**	**50**	**200**	**2 759**

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- **Trade in table olives (t)**

Imports/exports	1999	2000	2001	2002	2003	2004
Imports of green table olives	30	--	--	--	--	--
Imports of table olives turning colour	26	22	--	--	--	--
Imports of black table olives	--	4	--	--	--	--
Total table olive imports	**56**	**26**	--	--	--	--
Exports of green table olives	37 500	29 100	23 830	21 816	21 500	25 000
Exports of table olives turning colour	2 800	2 100	2 740	3 115	2 500	3 500
Exports of black table olives	40 200	34 600	36 260	32 403	28 000	41 000
Total table olive exports	**80 500**	**65 800**	**62 830**	**61 334**	**52 000**	**69 500**

- **Trade in oilseeds (t)**

Imports/Exports	1997	1998	1999	2000	2001	2002
Soybean imports	18 200	--	--	--	216 420	292 270
Sunflower seed imports	--	26 400	--	67 600	22 150	470
Rapeseed imports	11 900	81 980	--	31 050	--	--
Imports of other seeds	100	540	550	500	533	420
Total seed imports	**30 210**	**108 920**	**550**	**99 150**	**239 103**	**293 190**
Soybean exports	--	--	--	--	--	--
Sunflower seed exports	--	--	--	--	--	--
Rapeseed exports	--	--	21.90	--	--	--
Exports of other seeds	628.58	807.32	456.08	48.77	--	3.3
Total seed exports	**628.58**	**807.32**	**477.98**	**48.77**	**30**	**3.3**

b. Share of the olive sector (olive oils and table olives) in the total agricultural trade of the country in 1999 and 2000 (excluding stockfarming products):

Heading	1999	2000	2001	2002
Olive sector exports (%)	13.5	8.3	--	--
Total agricultural exports	**100**	**100**	**100**	**100**

Heading	1999	2000	2001	2002
Olive sector imports (%)	0.05	0.45	--	--
Total agricultural imports	**100**	**100**	**100**	**100**

II. <u>ORGANISATION OF PRODUCTION SECTOR</u>

A. General arrangements

1. <u>Governmental intervention concerning production capacity (olive tree, products and by-products) and its modernisation</u>

a. Public or private intervention agencies:

- Ministry of Agriculture, Rural Development, Water Resources and Forestry.
- Ministry of Trade, Industry and Craft Trades
- Ministry of General Affairs.
- Chambers of Agriculture.
- Official Chemical Testing and Research Laboratory.
- Autonomous Export Control and Coordination Agency.
- Olive Oil Exporters' Association (ADEHO).
- Federation of Moroccan Agricultural Product Processors (FICOPAM).
- Northern Olive Oil Processors' Association.
- Tensift-Haouz Olive Oil Processors' Association.
- Olive-pomace Oil Extractors' Association.

b. Practical details of intervention:

- Counselling of farmers on appropriate cultural practices and ways of raising productivity.
- Award of subsidies, premiums and aid to achieve production and processing targets.

c. Ongoing and/or planned programmes for olive orchard improvement or reorganisation:

The State has drawn up a National Olive Plan aimed at expanding orchard acreage (1 million hectares by 2020) and at improving existing orchards on 260 000 ha of land.

d. Modernisation programmes for the olive oil industry (olive oils and olive-pomace oils) and utilisation of by-products:

- Award of an investment premium for the installation and modernisation of olive processing equipment.
- Access to small crushing units for olive oil cooperatives having a collection centre.

e. Modernisation programmes for the table olive processing industry:

- No State intervention.

f. Storage of olive oils and olive-pomace oils:

- No State intervention.

i) Public or private intervention agencies that are responsible for or supervise the storage of olive oils and olive-pomace oils:

- None.

ii) Stock accumulation arrangements:

- None.

iii) Purchase price of oils for storage, by grade (price/t):

- No State intervention.

iv) Delivery prices and arrangements for stored oils, by grade (price/t):

- No State intervention.

2. Governmental intervention concerning production capacity of oilseeds and seed oils

a. Public or private intervention agencies:

- Ministry of Agriculture, Rural Development, Water Resources and Forestry.
- Ministry of Industry, Trade, Energy and Mining.
- Ministry of Economic Affairs, Finance and Tourism.
- Ministry of General Governmental Affairs.
- Official Chemical Testing and Research Laboratory.
- Federation of Oleaginous Products (FOLEA).
- National Association of Oilseed Plant and Textile Producers (ASPOT).
- Oils & Fats Federation.
- Moroccan Agricultural Product Marketing Company (COMAPRA).
- Moroccan Seed & Plant Association.
- National Seed Marketing Enterprise (SONACOS).

b. Intervention arrangements for oilseed production:

- Introduction of a subsidy of around MAD 1 910/t for sunflower seed production, representing the difference between the domestic and international price.

c. Intervention arrangements for edible seed oil production:

- Intervention guaranteed by the Compensation Fund.

d. Support arrangements for edible seed oil production:

- Abolition of the consumption subsidy for edible seed oils.

3. <u>Designations of origin, geographical indications, other</u>:

a. Agencies that grant and protect *designations of origin* and *geographical indications:*

- No olive oils are produced under designation of origin schemes.

***b. "Organic" designations* granted at national level for virgin olive oils:**

- No specific regulations.

***c. Protected designations of* origin granted at national level for table olives:**

- No table olives are produced under protected designation of origin schemes.

***d. Protected geographical indications* granted at national level for table olives:**

- No specific regulations.

B. Special arrangements for the 2003/04 crop year

1. <u>Domestic production of olive oils, olive-pomace oils and table olives</u>

Measures to support production: prices, direct and/or indirect aid, etc. (MAD/kg):

- No State intervention in the olive/olive oil market.

2. <u>Domestic production of other fluid edible oil production during 2001</u>

Measures to support oilseed and seed oil production during 2001:

- Introduction of a subsidy of around MAD 1 910/t for sunflower seed production, representing the difference between the domestic and international price.
- No subsidy so far for the production of other oilseeds.

Heading	… seeds or oils:			
	Sunflower	**Soybean**	**Rapeseed**	…
Production target purchase price for seeds	MAD 2 489/t	--	--	--
Direct aid for seed production	MAD 1 910/t	-	-	--
Production target purchase price for seed oils	Free	MAD 8.40/litre	MAD 8.40/litre	--
Direct aid for seed oil production	--	--	--	--

III. ORGANISATION OF TRADE AND CONSUMPTION SECTORS

General arrangements

1. International trade; customs duties and miscellaneous aid for edible oils, oilseeds and table olives

a. Olive oils and olive-pomace oils:

Commodities	HS Code [1]	Imports [2]	Exports [2]
Olive oils, virgin and/or refined	**15 09 10** **15 09 90**	53.5% 53.5%	--
Olive-pomace oils, crude and/or refined	**15 10 00**	53.5%	--

b. Other main fluid edible vegetable oils, crude and/or refined:

Commodities	HS Code [1]	Imports [2]	Exports [2]
Soybean oil	**15 07 00** **15 07 90**	2.5% 25%	--
Groundnut oil	**15 08 10** **15 08 90**	2.5% 25%	--
Sunflower oil	**15 12 11** **15 12 19**	2.5% 25%	--
Cottonseed oil	**15 12 21** **15 12 29**	2.5% 25%	--
Rapeseed/turnipseed	**15 14 10** **15 14 90**	2.5% 25%	--
Corn oil	**15 15 21** **15 15 29**	2.5% 25%	--

[1] Nomenclature of the Harmonised Commodity Description and Coding System.
[2] Taxes (+), refunds (-), premiums (-) or other.

c. Main oilseeds not intended for sowing:

Products	HS code[1]	Imports[2]	Exports[2]
Soybeans	**12 01 00**	2.5%	--
Groundnuts	**12 02 10** **12 02 20**	72.5% 72.5%	--
Sunflower seeds	**12 06 00**	2.5%	--
Cotton seeds	**12 07 20**	157%	--
Rapeseeds/turnipseeds	**12 05 00**	2.5%	--

d. Olives intended for uses other than oil production:

Commodities	HS code[1]	Imports[2]	Exports[2]
Olives provisionally preserved	**07 11 20**	50%	--
Olives prepared or preserved otherwise than by vinegar	**20 05 70**	50%	--

2. Marketing and consumption on the domestic market during the 2003/04 crop year

a. Direct subsidies or aid for domestic edible oil consumption:

i) Olive oils and olive-pomace oils:

- No consumption subsidy.

ii) Other edible oils:

- Abolition of the consumption subsidy for seed oils since November 2000.

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1 Nomenclature of the Harmonised Commodity Description and Coding System..
2 Taxes (+), refunds (-), premiums (-) or other.

b. Domestic trading arrangements for all edible oils and table olives (transportation, packing, labelling, etc.):

i) Olive oils, olive-pomace oils and other edible oils:

- Free market for olive oils and olive-pomace oils.
- Free market for sunflower oil.
- The prices of the other fluid edible vegetable oils are free but must not overstep the ceiling of MAD 8.40/L according to the restraint agreement between the Government and the industry

i) Table olives:

- Free market.

c. *Food* standards applicable to edible oils and table olives:

i) Olive oils, olive-pomace oils and other edible oils:

- CODEX ALIMENTARIUS.

ii) Table olives:

- CODEX ALIMENTARIUS.

d. *Trade* standards applicable to edible oils and table olives:

i) Olive oils, olive-pomace oils and other edible oils:

- Decree of 14 October 1914 on the repression of fraud in the sale of goods and of the adulteration of edible and agricultural products.
- Resolution of 6 February 1916 regulating the use of antiseptics, colouring matters and artificial essences in foodstuffs and beverages.
- Resolution of 22 November 1921 concerning the sale of butter, lard and edible oils and fats.
- Repeal of the Resolution of 12 July 1926 concerning paraffin oils and mixtures of vegetable oils and mineral oils or paraffin oils.
- Resolution of 5 March 1928 concerning the importation of oils and incorporating new rules on paraffin oils and mixtures with vegetable oils.

- Resolution of 28 November 1950 amending the Resolution of 22 November 1921 concerning the sale of butter, lard and edible fats and oils.
- Resolution of 26 January 1955 amplifying the Resolution of 22 November 1921 concerning the sale of butter, lard and edible fats and oils.
- Decree no. 2-56-538 of 12 September 1956 amplifying the Resolution of 22 November 1921 concerning the sale of butter, lard and edible fats and oils.
- Decree of 9 May 1962 laying down rules for the manufacturing of edible oils.
- Decree of 28 August 1989 amending the Resolution of 22 November 1921 concerning the sale of butter, lard and edible fats and oils.
- Decree no. 2-93-179 of 12 December 1995 amending and amplifying the Resolution of 22 November 1921 concerning the sale of butter, lard and edible fats and oils.
- Decree of 20 May 1997 regulating the marketing of olive oils and olive-pomace oils.

e. General measures to protect food consumption of oils and table olives:

i) Olive oil, olive-pomace oil and other edible oils:

- Quality control conducted by the relevant departments of the Ministry of Agriculture, Rural Development, Water Resources and Forestry.

f. Measures to curb fraud:

i) Body:

- Directorate for Plant Protection, Technical Supervision and Fraud Repression (Ministry of Agriculture, Rural Development, Water Resources and Forestry).

- **Results achieved:**

- Any cases of offences detected are brought before the relevant court.