



Boosting Organic Trade in Africa

Market analysis and recommended strategic interventions to boost organic trade in and from Africa

COUNTRY MARKET BRIEF FOR MOROCCO

This Market brief series is based on a study commissioned by IFOAM – Organics International in 2020 in order to better understand possible interventions that can promote market development and trade of organic produce in Africa.

The study was financed in the framework of the global project “Knowledge Centre for Organic Agriculture in Africa” (KCOA). The objective of the project is to establish five knowledge hubs that promote organic agriculture in Africa by disseminating knowledge on the production, processing and marketing of organic products as well as shaping a continental network. The project is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the German Ministry of Economic Cooperation and Development (BMZ) as part of the special initiative ONE WORLD – No Hunger.

Imprint

Published by the

Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH

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Bonn and Eschborn, Germany
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As at

Bonn / Eschborn, 2020

Design

DIAMOND media GmbH
Neunkirchen-Seelscheid

Photo credits

Mohamed Bahssine, Rudi Ernst, Hindrik Johannes de Groot / Shutterstock.com

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Referencing this report:

ProFound Advisers in Development, Organics & Development, Markus Arbenz (2020),
Boosting Organic Trade in Africa, IFOAM – Organics International, Bonn /
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Bonn / Eschborn.

GIZ is responsible for the content of this publication.

On behalf of the

German Federal Ministry for Economic Cooperation and Development (BMZ)
Division 124 – Rural Development, Land Rights, Forests
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INTRODUCTION

Farmers in the Dades Valley

The Morocco Market brief is part of a series with 12 specific Market briefs. They include information on the status of the organic sector and on the development of organic agricultural production and trade. They also provide deeper insight into how the organic market is organised: supply and demand dynamics including trends, supporting functions available and rules and regulations. All this is relevant information when trading with or in African organic markets.

The objective of the Market briefs is to inform national, regional and international specialists and interested public about the potentials of trade in organic products in and with African countries. The insights gained will facilitate the identification of possible interventions and opportunities and help to further build the organic sector in Africa.

This Market brief focuses on the organic market of Morocco. The complete series includes the following Market briefs:

1 Regional Market brief covering the 5 regions of the African continent: Southern, Eastern, Central, West and North Africa.

8 Country Market briefs covering the countries: Burkina Faso, Egypt, Kenya, Morocco, South Africa, Togo, Tunisia, Uganda

3 Product Market briefs covering the value chains: Coffee, Tropical fruits, Shea

Overview and development

Since Morocco's independence in 1956, agriculture has been a priority sector. The country's activities in organic agriculture started in 1986 with citrus exports to the European Union (EU). Soon other fruits and vegetables were cultivated organically targeting EU off-season demand and medicinal and aromatic plants (MAPs). The certified organic area in Morocco grew rapidly initially and has thereafter remained relatively constant with a recent dynamic particularly in export volumes. The surface dedicated to organic agriculture increased from approx. 500 ha in 1997 to 8,300 ha in 2003 and 9,300 ha in 2019. In addition, the surface for wild collection has grown by 80% since 2016 reaching 270,000 ha in 2019. Production volume has reached 100,000 tonnes, of which 17,000 tonnes are exported. With 302 certified producers (by internal control systems), 76 processors, 15 exporters and 1 PGS¹ (30 operators), the organic sector in Morocco is still relatively small.²

The main national organic products are the Argan tree (72%) and MAPs (22%). The main organic products under cultivation are MAPs, carob, olive as well as fruit & vegetable crops. The most important countries importing Moroccan organic products are (by share) France, Germany, Switzerland, the Netherlands, Turkey, Spain, the UK and the USA. The government has been fostering the organic sector since 2004 when it established a central office for organic agriculture. In 2010, it set up the Moroccan Organic Association (AMABIO), the then organic umbrella organisation, which in 2016 was reorganised to the Moroccan Interprofessional Federation of the Organic Sector (FIMABIO) as an exclusive interprofessional organisation. The government has ambitious goals triggering 100 million euros of investments, achieving 40,000 ha of organic agriculture land, a production of 400,000 t, exports of 60,000 t creating 45,000 jobs and generating 70 million euros of annual foreign currency income. In 2012, an organic law passed to regulate and promote the sector. It entered into force in 2018, making it the second national organic regulation in Africa, after Tunisia.

Participating in the global organic movement

In 2016, the Moroccan organic movement hosted the global organic advocacy to the Conference of the Parties (COP22) in Marrakesh. In 2017, it proposed to host the Organic World Congress (OWC) 2020 (ranked 2nd out of 12). It will propose again for the OWC 2024 on behalf of whole Africa together with the African Organic Network (AfrONet). Morocco is the first North African member in the AfrONet and it will host the next African Organic Congress in 2021.

Two certification bodies are accredited to certify organic products according to the Moroccan regulation, a precondition for the local market. Morocco doesn't have equivalence status with any other country. Farmers that are exporting must therefore use a foreign standard and certification body. PGS are not foreseen in the regulation, but the Network of Agro-ecological Initiatives in Morocco (RIAM) has set up at least one functioning example in the country.

The domestic market is emerging with considerable investments into organic outlets with local and international products, the latter mainly from France. Large retailers and wholesalers discovered the potential of organic products and started supplying. Even though the country imports organic products considerable activities in local production, marketing and export (e.g. of organic inputs such as fertilisers or seeds) can be observed.

¹ Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange. More information can be found here: www.ifoam.bio/pgs

² Kundermann, B. and Arbenz, M. (2020). Agroecology – A Rapid Country Assessment.

In 2019, a specialised trade fair for organic products, the BioExpo Maroc for domestic and international markets, was organised for the first time. The Moroccan organic sector is supported by international cooperation from France, Germany and Switzerland. These include value chain developments from Swisscontact, the organic component of the Agricultural and Forestry Technical Dialogue (DIAF) project of the German Ministry of Agriculture, the Knowledge Hub for Organic Agriculture in North Africa funded by the German Ministry of Economic Cooperation and Development and implemented by GIZ in cooperation with the Egyptian non-governmental organisation Sekem and FIMABIO, as well as the institution building projects of the African Organic Network (AfrONet) and Naturland, Germany. As a result of such projects, the Moroccan organic sector is one of the best researched in Africa.

Private and government stakeholders believe in growth and designed new strategies and investment plans within the framework of the Generation Green 2020 – 2030 strategy. These plans consider the opportunities of a well-organised sector, growing domestic opportunities of an increasingly health conscious middle class, the comparative advantages of production (climate, seasonality, special products) and the vicinity of European markets, where Morocco has a good reputation. Challenges include short seasonal windows for vegetables, significant competition with producers in southern Spain, lack of research and advice for producers.



Fruits on offer in the old town of Fez



An apple grower near Casablanca

Morocco's organic production

Infographic Morocco's organic production



Organic certified agriculture land:
9,917 ha (converted and under conversion)



Organic certified other areas (wild collection):
268,129 ha



Percentage of organic agriculture (on agriculture land):
0.03%



Organic producers:
277

List of active certification bodies:

■ Controllo e Certificazione Prodotti Biologici (CCPB, branch office Morocco) ■ Control Union (branch office Morocco) ■ Ecocert (branch office Morocco) ■ Certification of Environmental Standards (CERES) ■ Demeter ■ ProCert Safety



Table: Products and production in 2018 in Morocco

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Temperate fruits	a) 3,759	a) 21,408	n/a.	
Fresh vegetables and melons	a) 2,160	a) 53,850	n/a.	
Olives	a) 1,284	a) 5,840	n/a.	
Citrus fruits	a) 1,274	a) 19,900	n/a.	Raw materials for around 3,500 tonnes of orange juice
Rose	a) 246	a) 379	n/a.	Raw material for rose oil
Argan (wild)	a) 31,692	a) 15,846	n/a.	470 tonnes of oil
Rosemary	a) 56,000	n/a.	n/a.	
Cactus	a) 40,700	n/a.	n/a.	
Opuntia (wild)	a) 4,367	a) 22,667	n/a.	
Carob (wild)	a) 1,820	a) 18,201	n/a.	
Caper	a) 250	a) 501	n/a.	

Sources: a) Research Institute of Organic Agriculture – FiBL (2018) statistics; United Nations Conference on Trade and Development, UNCTAD (2018)

Of the around 300 operators 35% are located in Souss-Massa, 23% in Marrakesh-Safi and 14% in Casablanca-Settat. The largest area dedicated to organic agriculture is found in Rabat-Sale-Kenitra with 35% of the country's 9,300 ha of organic agriculture land, while Tanger-Tetouan-Al Houceima occupies 29%, Draa-Tafilalet 18% and FES-Meknes

15% of the organic agriculture land. Wild collection (about two thirds for Argan trees and one third for MAPs) is mostly found in the East and in the region of Timahdit. About 1,000 ha are in conversion including land for vegetables, olives, citrus and other fruits and dates.³

³ FiBL (2020). Analyse des besoins/diagnostic pour la production, transformation et de marchés nationaux et internationaux des produits bio du Maroc.

Morocco's organic market

Infographic Morocco's organic market



Main products for interregional export markets:
Temperate fruits, citrus fruits (incl. orange juice), vegetables



Main products for domestic and regional markets:
Complete range including imported packed products



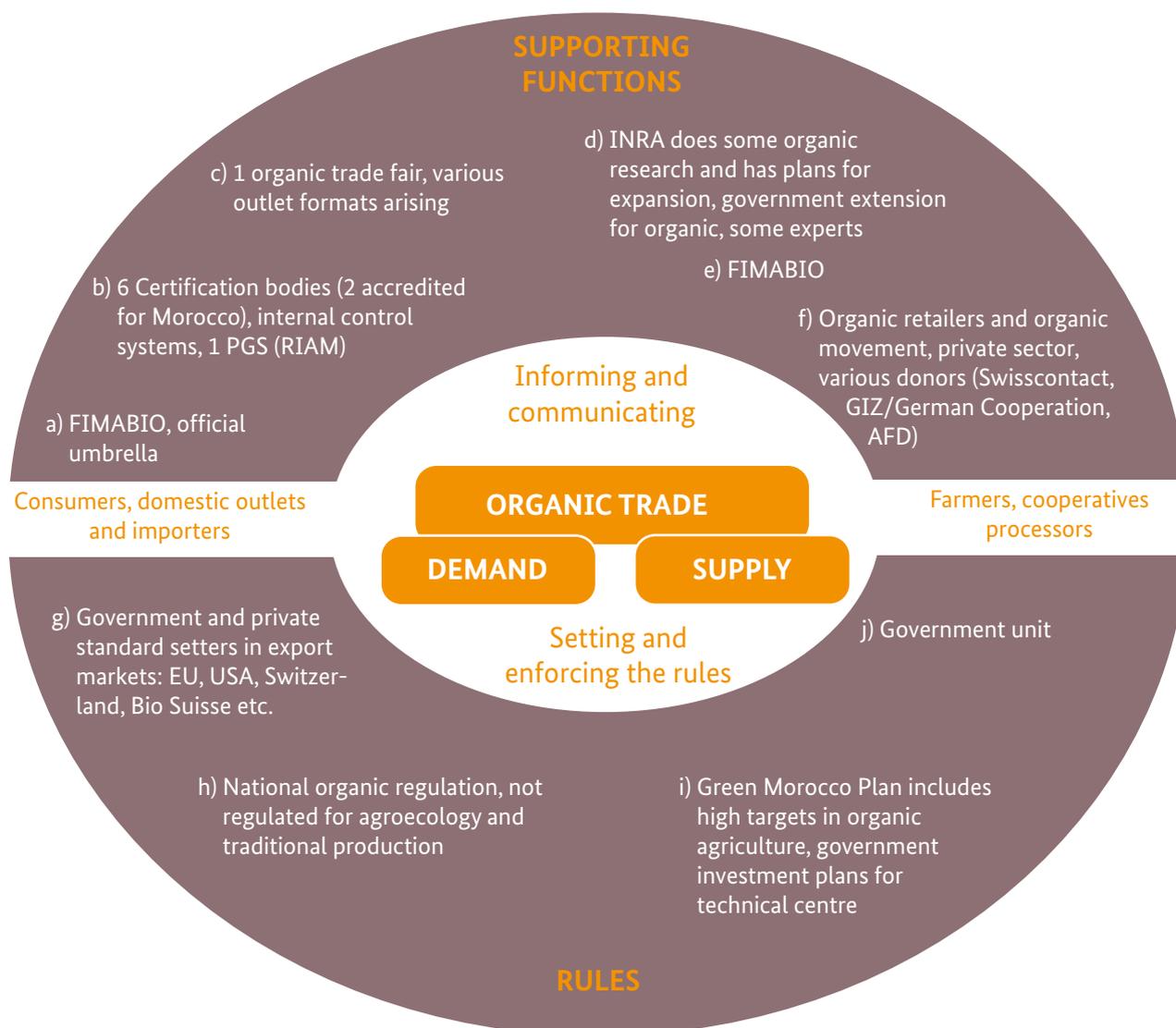
Total volume of the exports:
589 tonnes to the USA in 2019
20,744 tonnes to the EU in 2019



Total value of the exports:
2.9 million USD to the USA in 2019



Number of operators that are exporting from Morocco: **215**



Letters in the doughnut refer to:

- | | |
|--|-----------------------------------|
| a) Organic umbrella | f) Promotion & PR |
| b) Certification, Internal Control Systems & PGS | g) Export Standards |
| c) Trade Facilitation | h) Private Standards & Regulation |
| d) Research & Advise | i) Promoting Policies |
| e) Advocacy | j) Trade Governance |

Supply chains' demand

Demand in Europe for products from Morocco and export quantities are increasing. 45% of the export volume go to France, 40% to Germany, 8% to Switzerland, 2% to the Netherlands and 5% to other countries. In terms of products, 56% of exports are processed plant products, 22% are fresh vegetables and 21% are citrus fruits.⁴

Domestic demand is reported to be increasing. A 2014 survey showed that the population is interested in organic produce. Consumers are both sensitive to healthy/safe products and prices. Studies from the DIAF project show that consumers wish for a diversification of products, availability around the year, and improved quality management. DIAF promotes a so-called 4x4 strategy (4 measures for the domestic and 4 measures for the export markets) to accelerate demand.

Supply chains' supply

There is a wide range of products with potential to increase production and diversity in order to continue the trend since 2010 (production increased from 40,000 t to 100,000 t, exports from 10,000 to 17,000 t). Particularly the wild collection area grew.

In a 2019 Swisscontact survey, 85% of operators reported that they market their products directly, 20% delivered to specialised stores, 25% sold through wholesalers and 45% exported directly. Operators often use various chains, cater to domestic and international markets, and supply to organic and conventional channels.⁵

About 100 operators work with a total 40 export companies for product export. Supply quantities for various products vary considerably from year to year.

Input suppliers exist (e.g. Eléphant Vert) and the domestically produced organic fertilisers include export to West Africa, but farmers report difficulties in terms of availability, in particular for (organic) seeds.

⁴ Azim, Khalid (2020). Situational analysis of organic and ecological agriculture in Morocco

⁵ Charras, C. and Gignoux, S. (2019). Etat des lieux et cartographie des filières de la production biologique au Maroc.

Market place

There is a diversity of marketing strategies and market places for organic products. Export markets (and conventionally sold organic products) dominate in terms of quantity. However, more diverse domestic markets including both certified and traditional forms of trade are becoming more important. Around 15 shops and restaurants market organic products to consumers, mainly in Casablanca, Rabat, Marrakesh and Tanger. The chain Green Village (formerly called La Vie Claire) consists of 4 shops (with a substantial range of 4,000 products. Of these, 65% are high priced organic import products). Domaine Agricole has 2 shops. There are also online market places like *natureoshop.com*, *bioland.ma* or *epicerieverte.ma*. Various producers supply short chain markets offering basket schemes, sell from the field/farm or supply farmers markets.

Recent consumer interviews revealed a positive spirit and the expectation of growing demand with a potential of 1% of the population regularly buying organic produce, particularly fresh produce and typical Moroccan products. About 40% of operators for the domestic market supply packed and 60% supply unpacked products.⁶

⁶ Charras, C. and Gignoux, S. (2019). Etat des lieux et cartographie des filières de la production biologique au Maroc.

Terrace cultivation in the Atlas Mountains



Supporting functions

<p>Organic Umbrella: FIMABIO is a small umbrella organisation (based on voluntary and consultant work) bringing together three associations each representing one aspect of the value chain: Producers, processors and distributors / exporters. Swisscontact (earlier the Swiss State Secretariat for Economic Affairs), Naturland, BMZ, AfrONet, and the French Development Agency (AFD) support FIMABIO regarding institutional development and stakeholder services.</p>	<p>Promotion and PR: Operators, non-governmental organisations and the media promote organic without centralised coordination. Improving promotion and PR is part of the proposed 4x4 strategy of DIAF.</p>
<p>Certification, ICS⁴ and PGS: The following certification bodies are active in Morocco: Controllo e Certificazione Prodotti Biologici (CCPB, branch office Morocco), Control Union (branch office Morocco), Ecocert (branch office Morocco), Certification of Environmental Standards (CERES), Demeter, Pro-Cert Safety.</p> <p>There is one PGS with 26 operators supervised by RIAM.</p>	<p>Advocacy: An organic desk at the Ministry of Agriculture does not exist, but there are well-established relationships between the organic movement and decision makers on a national level. The National Food Safety Office (ONSSA) is the government unit supervising the implementation of the organic regulation.</p> <p>A number of civil society organisations work towards supporting general sustainable and agro-ecological approaches including World Wide Opportunities on Organic Farms (WWOOF), Migrations & Développement, Terre et Humanisme, RIAM, Fondation Pierre Rhabi etc.</p>
<p>Trade Facilitation Services: One organic trade fair took place so far. It was organised by the Club des Entrepreneurs Bio (CEBio) and Agissions Vert. FIMABIO and members use the conventional food fair to promote organic.</p>	<p>Research and Advise: The National Institute for Agricultural Research (INRA) is the only government institution dedicated to agronomy research in Morocco with one employee dedicated to organic agriculture. A more comprehensive organic research programme of INRA is under consideration.</p> <p>FIMABIO is cooperating with Sekem and GIZ for the implementation of the Moroccan chapter of the Knowledge Hub for Organic Agriculture in North Africa.</p> <p>Financed by AFD, AfrONet implements a project to promote innovations.</p>

⁷ Internal Control Systems



Processing of argan seeds in Essaouira

Rules

Export Standards: There is no equivalence of the Moroccan regulation with any other organic regulation. Therefore, export countries' and private standards need to be applied.

Private Standards and Regulations: Despite the government regulation, cases of misuse of the term "organic" in the local market appear.

Promoting Policies: Organic subsidies do not exist.

Trade Governance: Administration procedures for export are complex. The National Multidisciplinary Commission on Organic Agriculture (CNPBio) is the government's committee to coordinate the sector.

Conclusions

Morocco has good organic governance structures and was rated second best in Africa by the Ecological Organic Agriculture Initiative of the African Union. The structures and required elements of an organic sector are in place. Stakeholders are committed and participate in the global organic movements (e.g. BIOFACH presence, membership of IFOAM – Organics International, International Society of Organic Agriculture Research and AfrONet). Considering the size of Morocco, there is potential for expansion of the country's organic sector. After a successful start in the 1980s and 1990s, the sector developed dynamically in recent years and export volumes increased considerably to 17,000 tonnes in 2018 including fresh (off-season vegetables) and processed products (e.g. frozen fruits, juices or oils). Wild collection products (MAPs and argan oil) registered a particular growth.⁸

The domestic organic market has mainly grown in the larger cities. The initiatives are diverse: On the one hand, non-certified agro-ecological grassroots initiatives as well as PGS leaning to traditional Moroccan products can be found. On the other hand, professionalised value chains exist with certified operators supplying to processing industries who again supply the local wholesale and the export market. The organic market serves both a price-sensitive clientele that is aware of food safety, and affluent consumers with special food preferences relying strongly on imports.

Moreover, organic trade is relevant for organic inputs for organic and non-organic operators. For the non-certified and exporting operators the use of organic fertilisers and pesticides often is more convenient. Such organic fertilisers and pesticides are produced in Morocco and exported.

⁸ Charras, C. and Gignoux, S. (2019). Etat des lieux et cartographie des filières de la production biologique au Maroc.

