



2016

Country Profile: Morocco

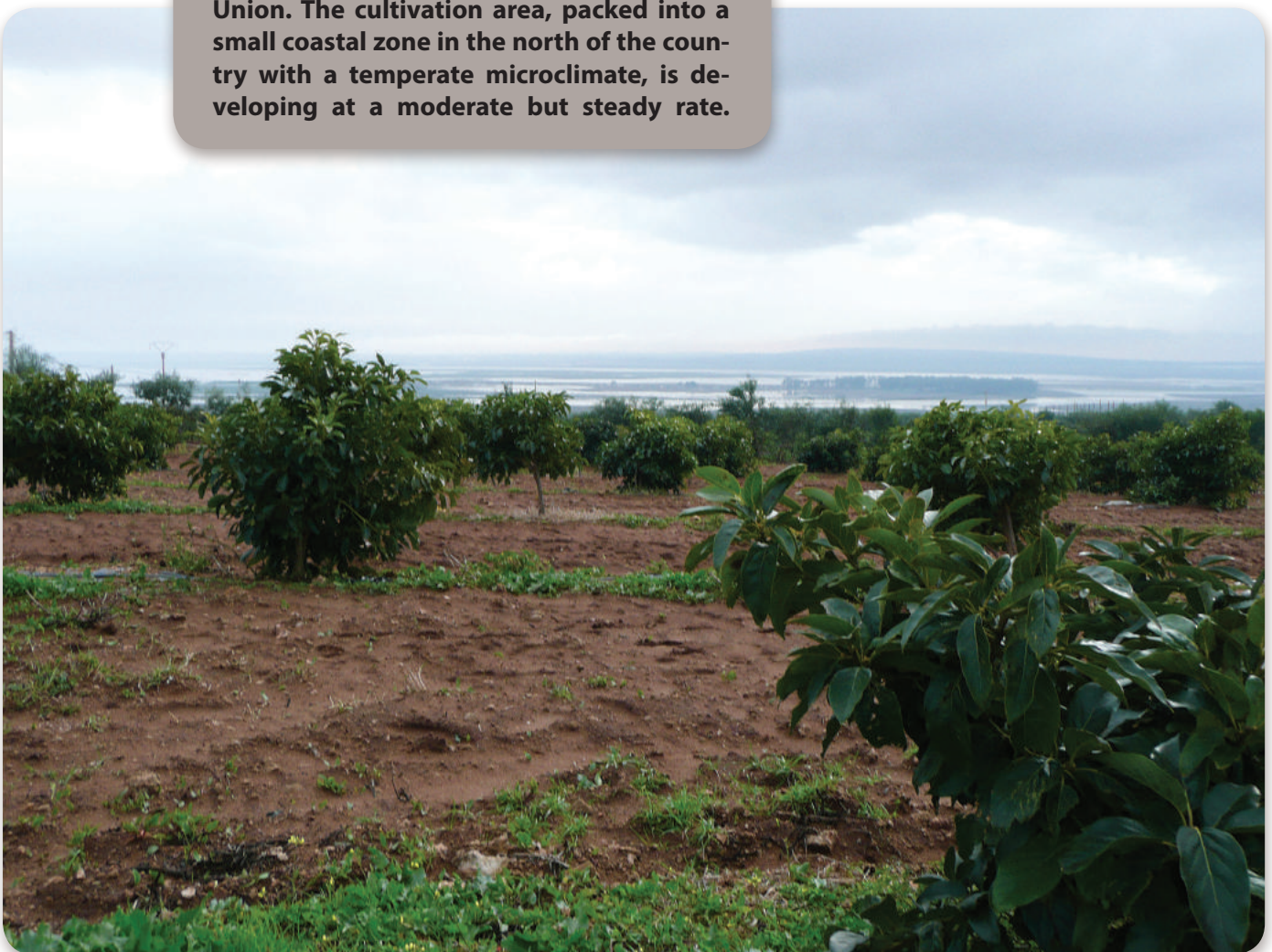
Producer country profile produced by *CIRAD, The Centre De Cooperation International En Recherche Agronomique Pour Le Développement*.

Producer country file

The avocado in Morocco

by Eric Imbert

After entering the international avocado scene around a decade ago, Morocco remains a modest player, with exports of between 5 500 and 7 500 t in recent campaigns, practically entirely aimed at the European Union. The cultivation area, packed into a small coastal zone in the north of the country with a temperate microclimate, is developing at a moderate but steady rate.



Avocado — Morocco

Location

The cultivation area, estimated at 3 000 and 4 000 ha, is located mainly in the north of the country, in the Gharb region. The cultivated surface areas are practically all packed in between Kenitra in the south and Larache in the north, on a coastal strip approximately 130 km long and 7 to 8 km wide. The prevailing microclimate in this zone, which is temperate thanks to the immediate proximity of the sea and several lagoons (Merja Zerga, etc.), is well suited to the crop, although frost protection is advisable. Furthermore, the soils, generally sandy and well drained, limit the risks of *Phytophthora*. The decreasing rainfall, which has been between 350 and 800 mm in recent years, is enforcing use of irrigation. Agricultural water resources are good in the north of the zone (from Moulay Bouselham to Larache) thanks to the irrigated area of Loukkos, supplied by the river of the same name and the reserve lake of the El Makhazine dam. They are tending to dwindle further south (from Moulay Bouselham to Kenitra), where irrigation is based on wells dug into the R'mel water table. Some moderately sized plantations have also been established south of Casablanca, in the Azzemour region.

The production facilities comprise 80 % small or medium plantations, which range between 1 and 20 ha. The average yield of an adult orchard is 10 to 12 t/ha. Sanitary problems are very limited, given the dispersal and young age of the cultivation area.



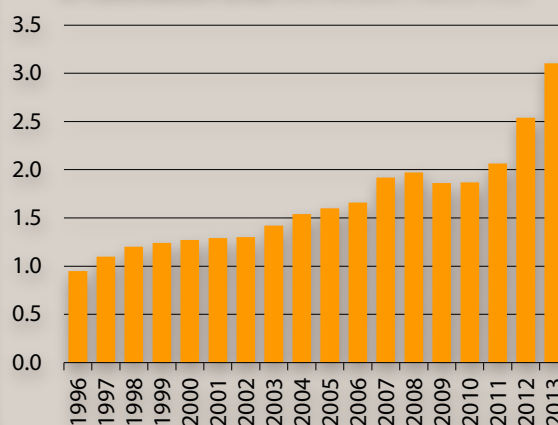
Avocado — Morocco

Production

Though some planting trials on a significant scale were conducted in the early 1960s, the Moroccan Hass industry only developed very recently. The first dedicated export orchards were set up in the early 2000s by Abaz, the country's main architect of the industry's boom. The avocado cultivated area, estimated at approximately 1 500 ha in 2010, apparently at least doubled in recent years. The "Maroc Vert" plan did not have a decisive effect on this growth, as the avocado was not part of the targeted products (aid limited to a significant subsidisation of the irrigation system). The development of the industry was built around the agronomic potential of the Gharb zone and the prospects offered by the proximity of the developing Community market, where the Moroccan market enjoys special access conditions (zero customs

duty, no entry price). This high added-value crop attracts a growing number of producers, especially since the region is among the poorest in the Kingdom and one of its economic pillars, namely the strawberry industry, is facing major commercial problems. The cultivation area is expanding by approximately 200 to 300 ha/year. The plants are imported (especially from Spain) or produced locally in the country's only specialised nursery (Brokaw in Moulay Bouselham). While large surface areas are still available, land law remains a real obstacle to development (paucity of agricultural investments due to the absence of long-term leases, extensive parcelling-up of land still largely belonging to the State and under collective management). Furthermore, the low technical level of most producers and the absence of a national support body could pose problems in the future, when technical management of the crop will become more complex. Producers have a representative authority, the AMPEA (Moroccan Association of Avocado Exporting Producers), but at present it is dormant. The emergence of a cooperative sector could help organise production, manage technology transfer and better defend the interests of the small and medium producers. However, the statutes of this type of organisation currently in force in the country must be modernised, to be more like a private business.

**Avocado - Morocco - Evolution
of cultivation area** (000 hectares / source: FAO)



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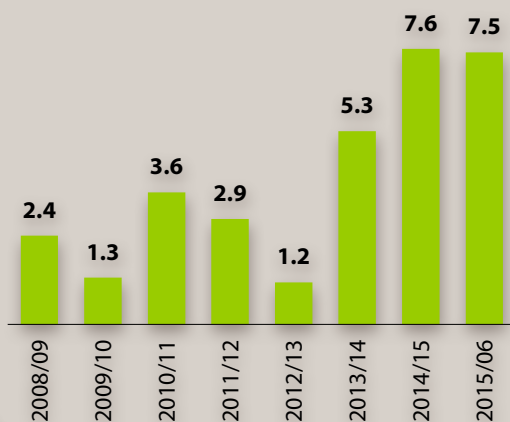
Avocado — Morocco

Exports

Morocco is still a modest player on the international scene. Exports have been between 5 500 and 7 500 t in recent seasons, though they are tending to increase. Approximately 90 % are aimed at the EU-28 in a normal production year, and are mainly imported via Spain, France and Germany. Those volumes shipped out of the Community market are aimed above all at the Arabian Peninsula (United Arab Emirates and Saudi Arabia in particular). The sector is concentrated around two main players which each have a specialised packing station: Abaz, the country's only big producer/exporter, and Tropical Millenium. Three other stations, which handle more limited volumes, also process the avocado on a spot basis via service contracts or purchased batches.



Avocado - Morocco - Evolution of exports
(000 tonnes / source: Comtrade)



Production calendar and varieties

Hass currently occupies approximately 50 % of surface areas, and is tending to increase its share. Fuerte is the main green variety. Mature from late October/early November, it can remain on the market until February. Zutano and Bacon, both used as pollinators, have a small presence in October.



Avocado — Morocco — Production calendar

Varieties	O	N	D	J	F	M	A
Hass							
Fuerte*							

* local market

Avocado — Morocco

Outlets

Hass production is aimed primarily at the export sector. Nonetheless, the local market consumes increasing volumes of green varieties and small Hass, produced locally or imported (approx. 7 000 to 9 000 t/year). The fruits are often consumed in the form of smoothies (known locally as Panachi).

Logistics

Fruits bound for the EU-28 are exported in refrigerated lorries, which can reach the main West European markets in 48 hours.

