

SUNFLOWER IN MOROCCO

M. MEDOUAR (*) and M. EL ASRI()**

(*) : Director of ASPOT, National Association of the Producers of the Oleaginous and Textile Plants, 14 Street Michlefen N° 7 Agdal Rabat Morocco. Fax: 212 37 672273.

(* *) : Coordinator of the National Program of the Annual Oilseeds, INRA/Regional Center Saïs-Midle Atlas, B.P. 578 Meknès Morocco. Fax: 212 55 300244.

SUMMARY

The edible oil deficit, in Morocco, is of the order of 80% of needs. The potential of the oleaginous cultures is estimated 470000 ha. During the last ten campaigns, the average surface of the oleaginous cultures amounts to 120000 ha / year. The sunflower is the principal oleaginous culture in Morocco. The National Association of the Producers of Plant Oleaginous and Textile aims at the defense of interest of the producers of oleaginous, to them organize and to contribute to the development of oleaginous network. The purpose of the Federation of the oilseeds is to contribute to the organization, the development, the promotion and the integration of the oleaginous network. Research on the annual oilseeds are led by a multi-field team of the INRA and the other institutions of research and Education in the zones where they present a high potential of production. The programming of the research projects is made according to a participative method. The development prospects of the oleaginous cultures aim at a level of autosufficiency of the order of 40 % of needs.

PRESENTATION OF THE SECTOR

The sector of the annual oilseeds takes on a great importance on the technical, economical and social plans. Indeed, the annual oleaginous cultures allow a rationalization of the development, an improvement of the income of the farmers and creation of an important number of employments on the level of the production, marketing and transformation. Furthermore, the guarantee of the security of supply of our edible oil country by the national production, constitutes one of the essential objectives of our agricultural politics, but currently Morocco imports on average 260000 tons of oil seeds per year. Indeed, for a consumption of our edible oil country 350000 tons / year, the national production covers only 20 % including 40000 tons of olive oil (12 %) and 25000 T of oil seeds (8 %). On the basis of these considerations, important efforts were deployed by the State especially during the 1980s to develop and diversify the oleaginous cultures whose potential is estimated 470000 ha for a production of 1000000 tons seeds and 400000 tons of oil.

Average surface of the oleaginous cultures during ten last campaigns amounts to 120000 ha / year. These achievements recorded a clear decrease of 40 % during five last years, in comparison with 1988-92 period. The productions also knew a reduction, passing from 116000 tons during the period 1988-92 to 45000 tons during the period 1993-97. The grain yield are irregular and remain on levels still rather low: 0,75 ton / ha for the sunflower and 1

ton / ha for rape seed. The extracted oil from trituration of local seeds represented only 9,6 % of oil production refined during the period 1993-97 against 19,8 % during the period 1998-92. With the deregulation in 1996, the oleaginous network knew certain disturbances. The economic conditions lived by the network exerted tensions on the incomes of the operators compared to a more favorable former situation owing to the fact that the former profited from a protection.

The sector of oleaginous seeds has the principal following assets which militate for its development :

- The necessity to assure the edible oil security to answer a strong demand generated by the demographic growth,
- The great possibilities of production so much on the level of the potential surfaces as and at the level of the realizable grain yield,
- Existence of a processing industry equipped and a great capacity of trituration,
- The technological experiences realized by INRA and other institutions of research and education, offering great improvement possibilities of the sector,
- The installation of a professional organization (ASPOT) and inter professional one (FOLEA).

However, the sector of oleaginous seeds is also confronted with constraints of technical order, of which particularly :

- The weakness of the grain yields on the level of the principal zones of production, which affects the profitability of these cultures,
- The slow extension of surfaces,
- The low contents in fat of local seeds,
- Low advising of the producers because of the lack of means of the CT and the CDA.

A development plan of the network was elaborated in the order to alleviate these constraints :

- The extension and intensification of the oleaginous cultures essentially in the irrigated zones and the favorable environments (rainfall more than 450 mm),
- The improvement of the context of production through the improvement of the farming techniques and farmers advising,
- The improvement of the economic context by the granting to the producers of a equitable price, the rise of the productivity and the organization of marketing so as to make profit to the producers from the negotiated prices,
- The outlet and the price being acquired with the producers on the basis of lease defining reciprocal engagements in a vision of market,
- The support for the professional organizations to help them to deal with certain specific operations to the development of this sector.

1. National association of Producers of the Oleaginous and Textile Plants (ASPOT)

The ASPOT, created in 1994, groups together all the producers of oleaginous plant in order to defend their interests, to organize them and contribute to the development of the oleaginous network, however by fault of means they did not became operational until 1997. The ASPOT is essentially financed by a levy on the production. It has established an agreement with the DEPAAP for the intensification of extension programs.

The ASPOT is also coupled with AGROPOL, which represents French oleaginous programs abroad and has the technical support via projects of partnership. The ASPOT which leans on Producers' regional associations, chairs the Federation of the Oilseeds (FOLEA) which gathers all the speakers of the oleaginous network, the producers up to trituration, including the collectors and the seed companies.

Since its creation in 1994 and especially since the deregulation of the network in 1996, the association started to play an active role in the network in particular by :

- The negotiation with the trituration and the collector to define the production prices,
- The initiation of a study which served as base for the elaboration of the plan of development of the oleaginous network which was validated by all the partners in July 2000,
- The implication of SONACOS for marketing of seed of sunflower and rape seed,
- The intervention of the Moroccan Agricultural Cooperatives, at request of COMAPRA, in the case significant production,
- The contribution to the programs including trials of demonstration, commented visits, days of sensibilization, farmers trips in Morocco and abroad, etc.,
- The organization of training courses for the benefit of a hard core of engineers and technicians of the DPA/CT and the ORMVA, concerning the technical aspects and of communication,
- The production and the diffusion of support audio-visual, in collaboration with INRA, include brochures of sunflower in French and in Arab, posters, spotlight and television emission, a film about the sunflower (in progress),
- The dynamization and the intensification of the inter profession by the transformation of the CETIO into FOLEA.

2. Federation of oilseeds (FOLEA)

The federation of the oilseeds gathers the representatives of the Federation of the Greasy Substances (FCG), National Association of Producers of the Oleaginous and Textile Plants (ASPOT), of the Moroccan Company of Marketing of Farm produces (COMAPRA), Moroccan Association of the Seeds and Plants (AMSP) and the Moroccan Association of the of Seeds Increase (AMMS). The object of the FOLEA is to contribute and take part in the organization, the development, the promotion and the integration of the oleaginous network and in particular :

- To promote among the various partners constituting current inter profession, a politics of dialogue, in particular for the conclusion of inter professional agreements,
- To promote studies network and research on the production and the use of seeds and the products which result from this,
- To represent the inter profession near the public authorities and of the various national and international authorities.

In order to fulfill its prerogatives, FOLEA lays out a technical commission and an economic commission emanating from the board of directors as well as from the technical center. Thus, the FOLEA constitutes a suitable framework of dialogue and coordination between its members in sight :

- To elaborate a main plan for the promotion and the quantitative and qualitative development of the oleaginous production,

- To realize experiments to improve farming techniques and increase the productivity,
- To carry out actions of extension to increase and diversify the surfaces reserved for the oleaginous cultures,
- To negotiate the prices of the national production of the oil seeds and margins of collection.

3. National institute for agricultural research (INRA)

The orientations formulated for the oleaginous network within the framework of the Economic Plan of Development and Social 1999-2003 and of the Plan of Development of the Oleaginous Network 2000-2004 relate to the intensification of the means of the INRA to intensify the activities of research on the oleaginous cultures, the contribution to the efforts of transfer of technologies and improvement of the production of seeds. Indeed, the Ministry for Agriculture, Rural Development and Maritime fishing has a role crucial to play in the organization of all of the speakers in the oleaginous network through the encouragement of projects of partnership (or contract / program) of a common interest and an insertion of the agronomic research as an engine of the development. Thus, the contribution of INRA, in addition to research, lies on development and production of seeds. INRA also plays an important role in the professional environment of the oleaginous network.

The National Program of the Annual Oilseeds was created with an aim of contributing to the development of the annual oleaginous cultures in Morocco by the development of new technologies adapted to our soil and climate conditions and by the transfer of the research results in real environment. On the research plan, the principal objectives of the Program of the Annual Oilseeds are the diversification of the genetic material and the valorization of the production of the principal annual oleaginous cultures in Morocco (sunflower, rape seed, soybean and safflower). In front of this diversity of the species and agro-climatic zones in Morocco, a strategic choice of research is essential. Indeed, the priority research orientations were defined according to the method of the programming by objectives. The latter is a participative method and includes 7 stages going from the identification of the constraints to the production until the prioritization of the research projects for medium term. The results highlighted that the priority is granted to the sunflower and rape seed in the rain fed favorable zones where they have a high potential of production. Between the research projects, the priority is granted to the selection and the creation of varieties of the sunflower (population and hybrid) and of rape seed 00 (double zero). Seven other research projects are under development including four related to the sunflower and 3 related to rape seed.

The research projects are carried out by a multi-disciplinary team of seven researchers in the following disciplines: Genetic improvement, Agronomy, Pathology, Soil Science and Entomology. The Program also has a staff of support for the manpower of eight research technicians and three assistant agents.

PERSPECTIVES OF DEVELOPMENT

The objectives laid down by economic and social development plan 2000-2004, approved by all the partners, aim to reach 180 000 Ha of oilseeds, that is mainly sunflower and rapeseed, including 30 000 Ha in irrigated area, for a production of 250 000 MT of oilseeds and 100 000 MT of oil, in addition to 75 000 MT of olive oil. That amount will cover 40 to 50% our needs VS. 20% know.

In the horizon 2020, the forecasts of our oil needs would be at 600 000 MT including 400 000 MT to be covered by oilseeds.

In order to reach these objectives, a strategy was set up, based on :

- Enhancement of the research and experiment programs,
- intensification of the extension programs in order to improve the cultural techniques,
- set up an insurance against drought,
- improvement of the marketing system of oilseeds,
- reinforcement of the oilseeds producer's organization,
- development of contractual relationships between different partners, i.e producers, collector, industrial, etc.