

REGIONAL AGRICULTURE PROFILE (RAP) MOROCCO HUB



MOROCCO

TUNISIA

ALGERIA

LIBYA

MAURITANIA





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AGRICULTURE INFRASTRUCTURE DIVISION

2020 ECONOMIC & SOCIAL INFRASTRUCTURE DEPARTMENT IN COLLABORATION WITH
ECONOMIC AND RESEARCH INSTITUTIONAL LEARNING DEPARTMENT

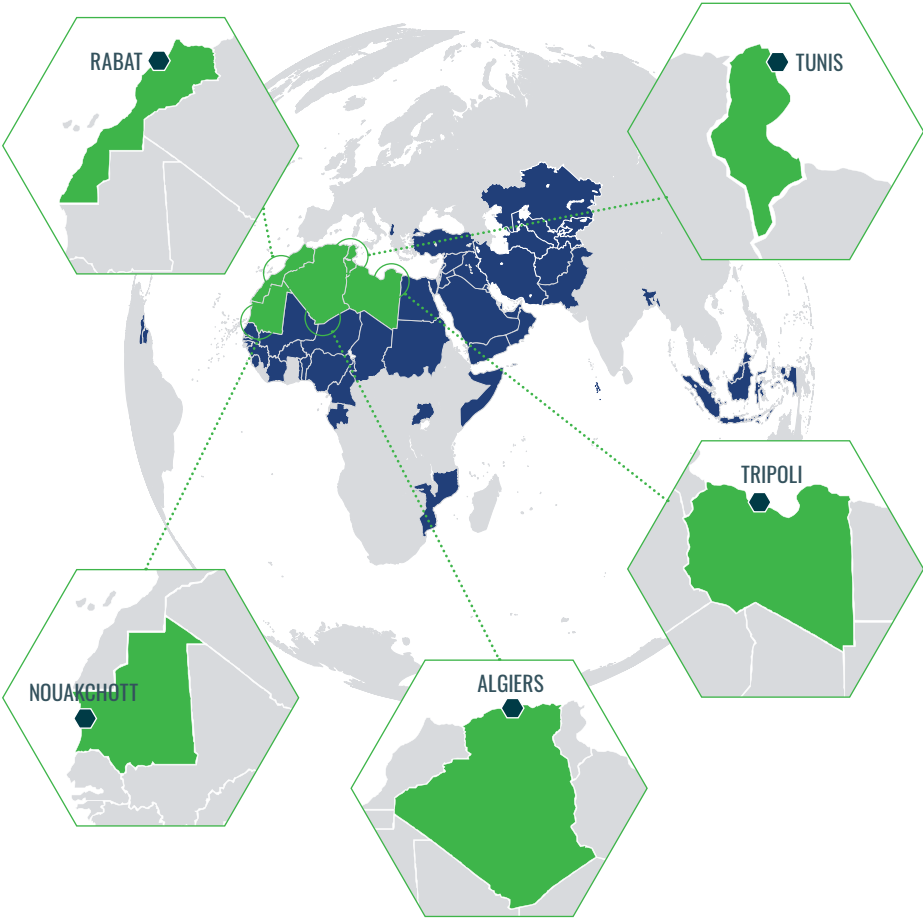
INTRODUCTION

The Islamic Development Bank (IsDB) Regional Hub in Morocco is based in Rabat, Morocco.¹ The hub is responsible of the Bank's operations in Algeria, Libya, Mauritania, Morocco and Tunisia.

THE PRESENT MEMBERSHIP OF THE ISDB CONSISTS OF

57 COUNTRIES

- ISDB MEMBER COUNTRIES
- REGIONAL AGRICULTURE PROFILE HUB



¹ IsDB opened a regional office in 1994 and was transformed to regional hub in 2018

ALGERIA

JOINING DATE 1974
 SUBSCRIBED CAPITAL (SC) US\$ 1,285.59 MILLION
 % OF TOTAL IsDB SC 2.54

LIBYA

JOINING DATE 1974
 SUBSCRIBED CAPITAL (SC) US\$ 4,771.66 MILLION
 % OF TOTAL IsDB SC 9.43

MAURITANIA

JOINING DATE 1974
 SUBSCRIBED CAPITAL (SC) US\$ 35.77 MILLION
 % OF TOTAL IsDB SC 0.07

MOROCCO

JOINING DATE 1974
 SUBSCRIBED CAPITAL (SC) US\$ 256.69 MILLION
 % OF TOTAL IsDB SC 0.51

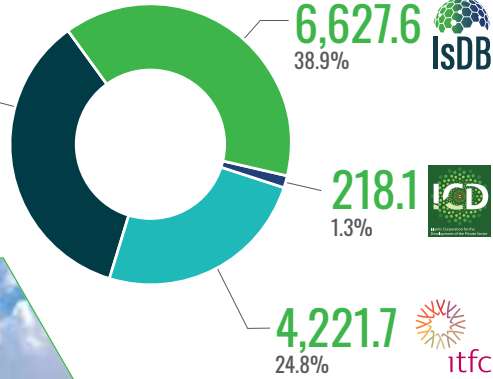
TUNISIA

JOINING DATE 1974
 SUBSCRIBED CAPITAL (SC) US\$ 36.40 MILLION
 % OF TOTAL IsDB SC 0.07

IsDB GROUP TOTAL NET APPROVALS
 1974-2019
 (MILLION US\$)

TOTAL
US\$ 17,040.5

OTHER FUNDS
5,973.2
 35.1%



MOROCCO HUB

TOTAL COUNTRIES AREA ('000 HA)

578,214



TOTAL POPULATION ('000)

100,904



2018

GDP PER CAPITA (CURRENT PRICES, US\$)

3,846

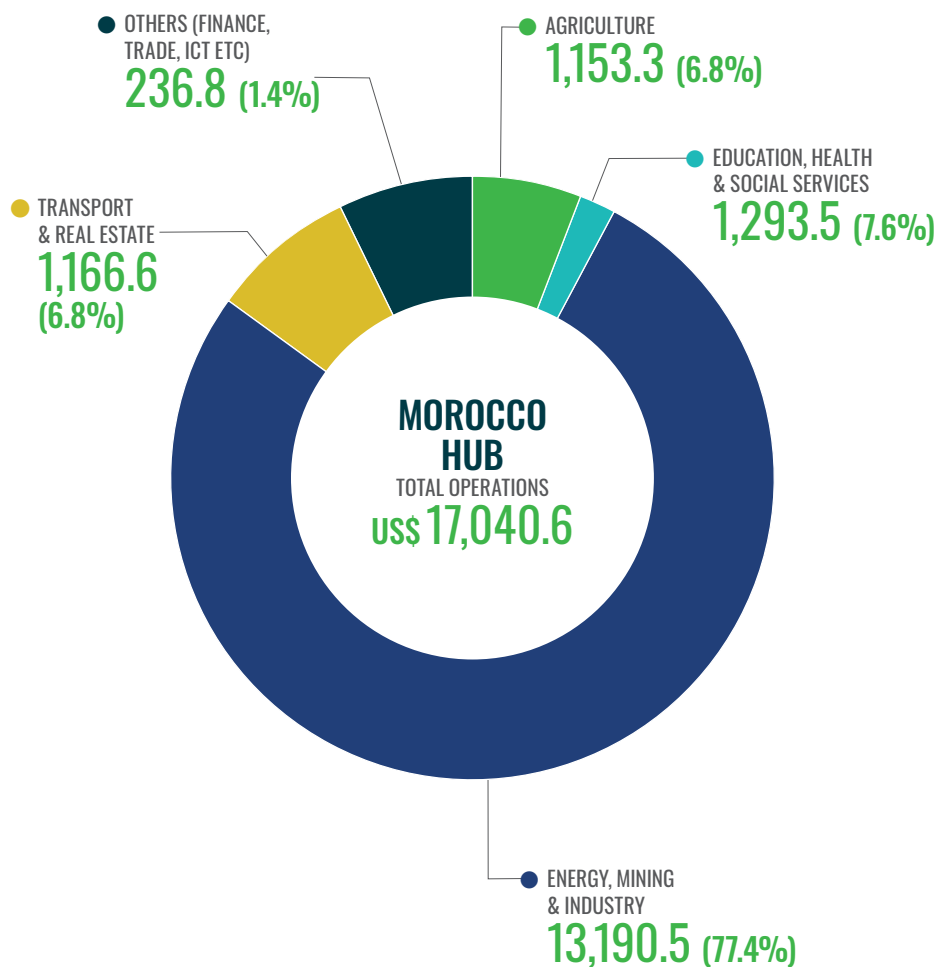


2010



IsDB GROUP OPERATIONS BY SECTOR 1974-2019

(MILLION US\$)



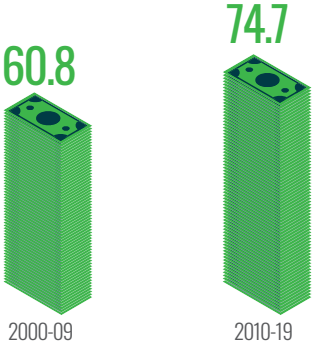


THE ENERGY,
MINING AND INDUSTRY
SECTOR HAS RECEIVED
THE HIGHEST APPROVALS AT
US\$12,835.1M
FROM 1974-2019

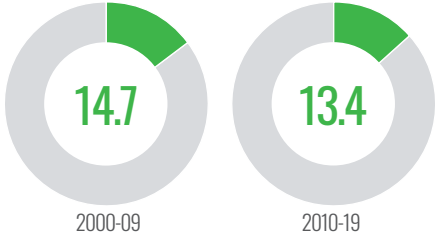
ECONOMIC RELEVANCE OF AGRICULTURE SECTOR

Agriculture is an important source of livelihood in the RH member countries. The sector accounts for about 13.4% of the region's overall GDP and provides employment for more than 28.79% of the active population.

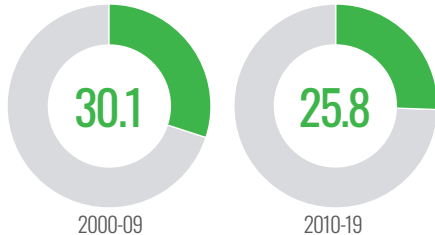
GDP (BILLIONS US\$)



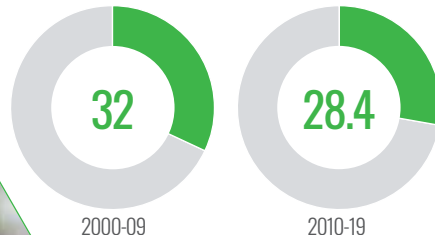
% AGRICULTURE TO GDP¹



% OF AGRIC. EMPLOYMENT TO TOTAL EMPLOYMENT



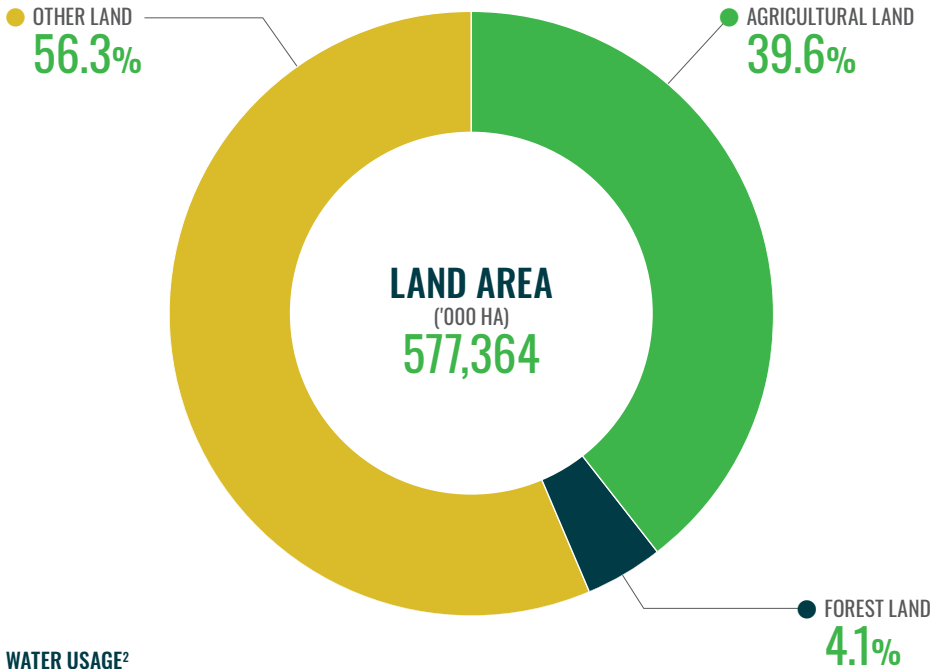
% OF FEMALE EMPLOYMENT IN AGRIC. TO FEMALE EMPLOYMENT



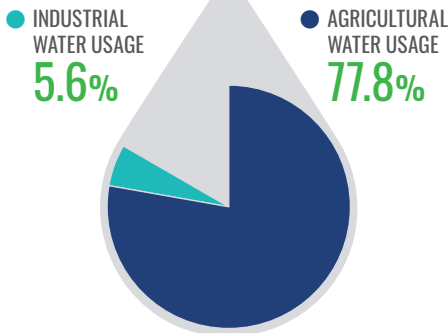
¹ Without Libya.

AGRICULTURE AND LAND USE

The agriculture land represent 39.6% of the region's total land area. Over the past two decades, the irrigated lands have increased substantially by 100,000 hectares. The agriculture sector is noticeably the highest water consuming sector utilizing 77% of the available water resources compared to 5.66% for the industrial use.



WATER USAGE²
(% OF TOTAL WATER USAGE)



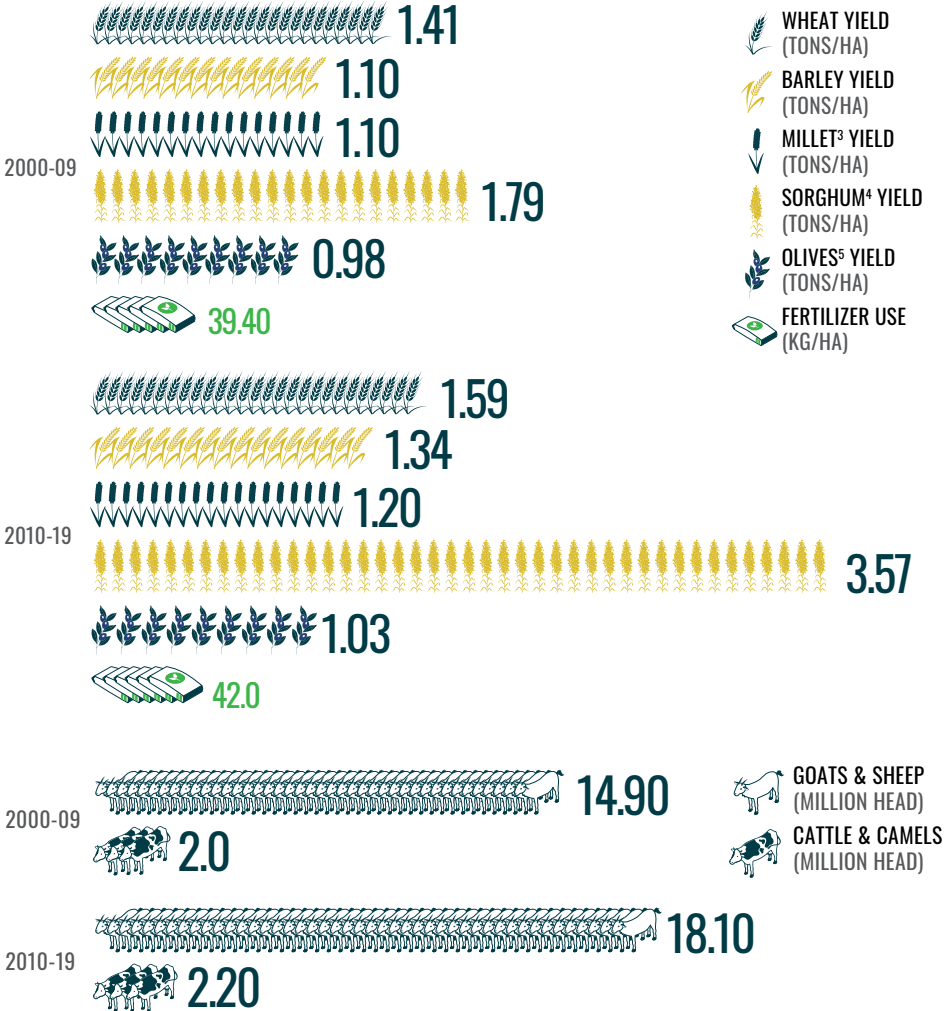
LAND AREA EQUIPPED FOR IRRIGATION
(%)



² Without Mauritania.

FOOD SECURITY AND NUTRITION

The cereals productivity (tons/ha) has increased with a very low rate during the last twenty years. The sorghum has witnessed noticeable yield increase and almost doubled. The aggregate of the global food security index has shown improvement over the last 10 years. This is also evident and substantiated by the noticeable decline in the Global Hunger Index and undernourishment indicators.

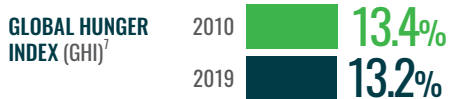


³ Without Algeria and Tunisia.

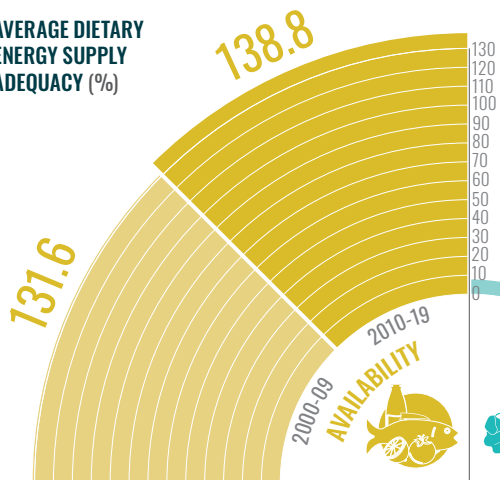
⁴ Without Libya.

⁵ Without Mauritania.

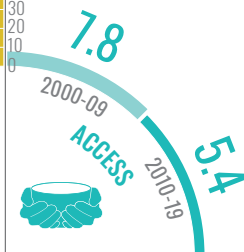
Overall, the food security situation in the region has improved in recent years. Global Food Security Index increased from 38.3 in 2010-14 to 43.8 in 2019, while Global Hunger Index declined by 13% during the same period.



AVERAGE DIETARY ENERGY SUPPLY ADEQUACY (%)



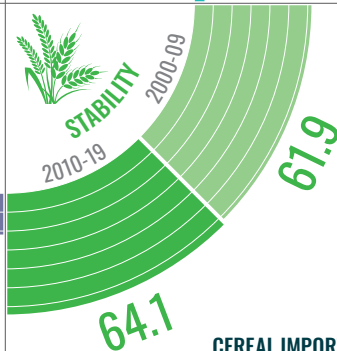
PREVALENCE OF UNDERNOURISHMENT (%)



% STUNTING IN CHILDREN UNDER 5 YEARS




CEREAL IMPORT DEPENDENCY RATIO (%)



⁶ Without Libya and Mauritania.

⁷ Without Libya.



THE HUB REGION
DEPEND PRIMARILY ON
RAINFALL AS THE MAIN
WATER SOURCE FOR
AGRICULTURE WHICH IS HIGHLY
VULNERABLE TO CHANGES IN
RAINFALL AMOUNT AND
PATTERNS

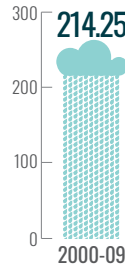
2010-19
RECORDED A
1.44°
TEMPERATURE
RISE



CLIMATE CHANGE

The member countries of the hub depend primarily on rainfall as the main water source for agriculture which rank the region as highly vulnerable to changes in rainfall amount and patterns. The region has witnessed increase in temperature by 0.28 C over the last twenty years.

NATIONAL RAINFALL INDEX (NRI) (MM/YEAR)



CHANGES IN TEMPERATURE (DEGREES CELSIUS)



MOROCCO REGION



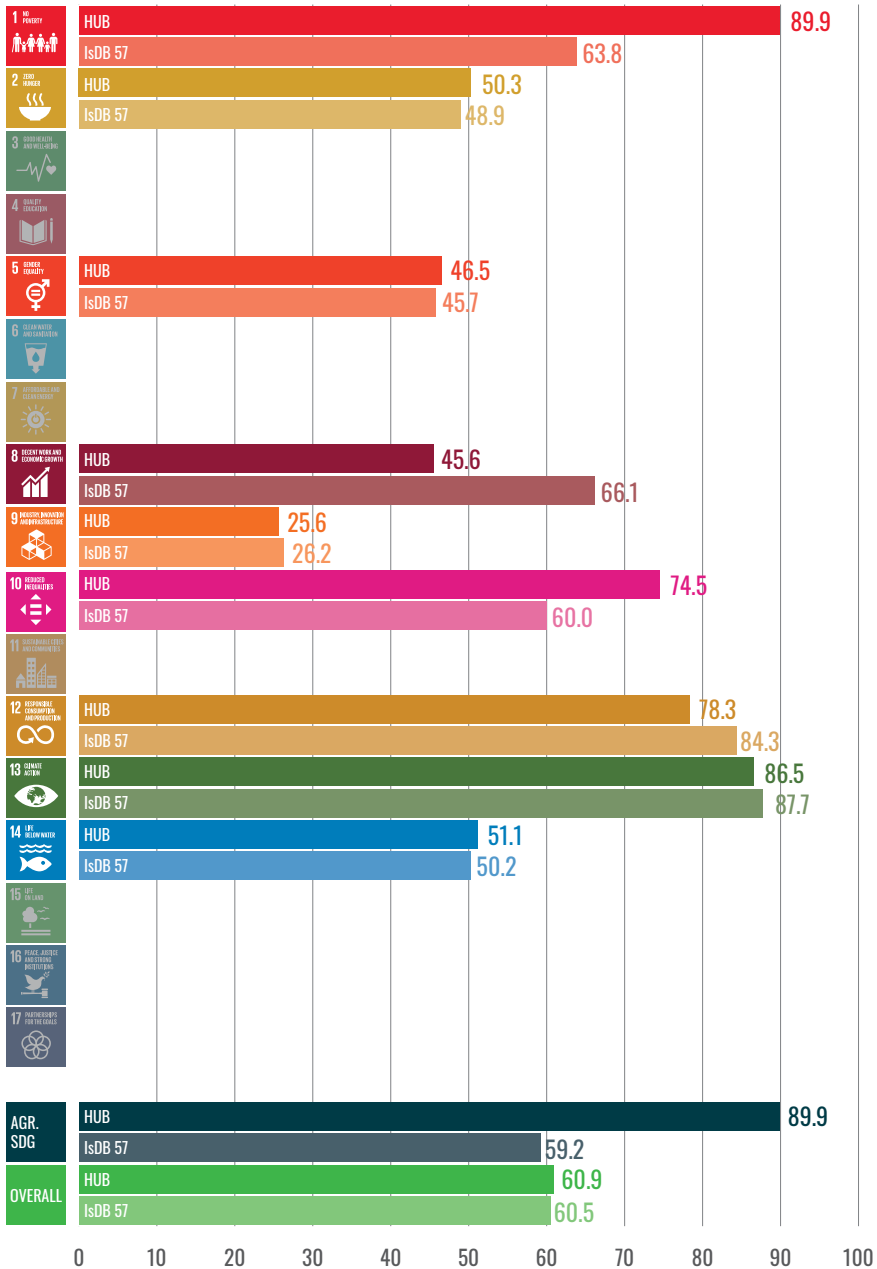
2000-09



2010-19

PROGRESS TOWARDS THE SDGs

AGRICULTURE-RELATED SDG SCORES | MOROCCO HUB vs IsDB 57





MOROCCO HUB
HAS ACHIEVED THE
HIGHEST PROGRESS
IN NO POVERTY (SDG 1)
WITH A SCORE OF
89.9%

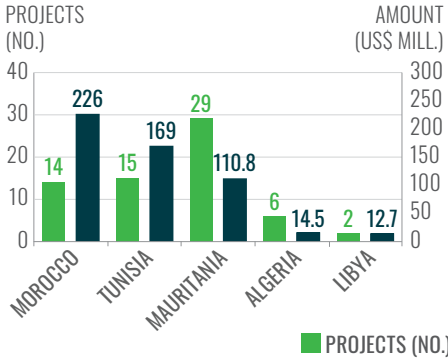


IsDB FOOTPRINT IN THE REGION

IsDB AGRICULTURAL FINANCING | 1974-2019

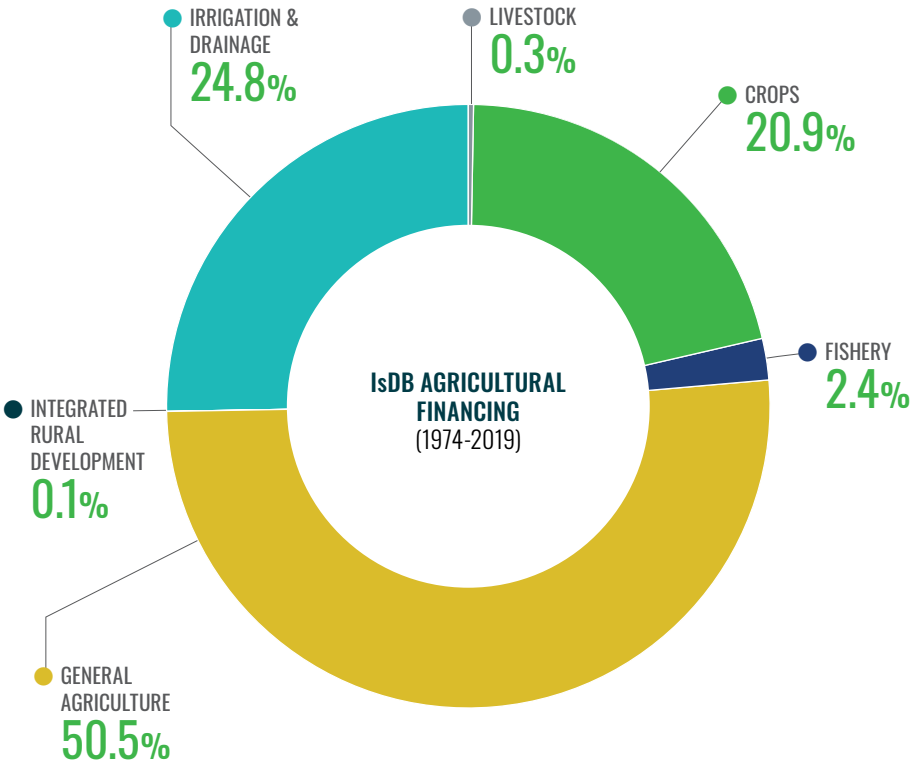
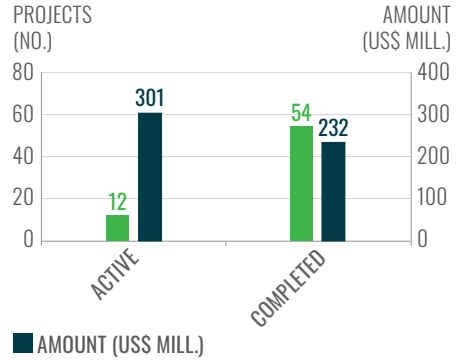
COUNTRY OPERATIONS

ACTIVE & COMPLETED (PROJECT NO AND US\$)



REGIONAL HUB OPERATIONS

ACTIVE & COMPLETED (PROJECT NO AND US\$)



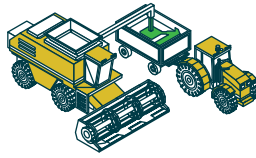
IsDB ONGOING INVESTMENT & KEY EXPECTED OUTPUT IN MOROCCO HUB



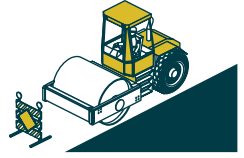
DEVELOPMENT
OF IRRIGATED LAND (HA)
10,112

TOTAL PROJECT INVESTMENT:

US\$114.09M



CROP PRODUCTION (TONS)
442,265



RURAL ROADS (KM)
214



IsDB PARTNERSHIP/OUTLOOK IN THE REGION

IsDB new business model, which is based on Global Value Chain, aims to boost the competitiveness of member countries. IsDB aims to achieve this goal by supporting member countries develop strategic industries in which they have comparative advantage, creating local supply chains and integrating them with Global Value Chains. This new business model will be implemented through GVC based Member Country Partnership Strategy (MCPS). In 2019, the bank has initiated the preparation of MCPS for Morocco based on the GVC model and plans to launch the Mauritania MCPS in 2021. The Bank is expected to support the region in the following thematic areas:



Increase crop and livestock production/
productivity



Building resiliency to climate change



Inclusive and competitive value chains
with private sector participation



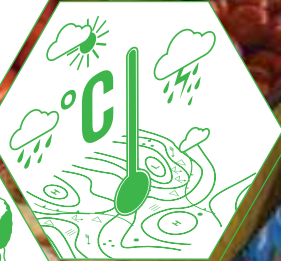
Islamic Financial Services Industry
Development

DATA SOURCES

IsDB project data is taken from the existing IsDB Database, while most other indicators are calculated based on the data available from FAOSTAT (<http://www.fao.org/faostat/en/#data>), except for the following indicators:


- (i) National Rainfall Index and total water withdrawal, agricultural water withdrawal and industrial water withdrawal as well as temperature change are taken from FAO AQUASTAT (www.fao.org/nr/water/aquastat/data/query/index.html?lang=en)
- (ii) Global Food Security Index is taken from 2018 Global Food Security Index and 2019 Global Food Security Index (<https://foodsecurityindex.eiu.com/>).
- (iii) Global Food Hunger Index Scores from 2000 to 2019 from 2019 Global Hunger Index (<https://www.globalhungerindex.org/download/all.html>).
- (iv) SDG Index Scores are taken and calculated from the 2019 publication of Bertelsmann Stiftung and Sustainable Development Solutions Network (SDSN) titled Sustainable Development Report 2019: Transformations to Achieve the Sustainable Development Goals. Some of the Scores are taken and calculated from the 2019 IsDB Publication titled Reaching the SDGs: Progress of the IsDB Member Countries.
- (v) Percentage agriculture GDP to total GDP is from the World Bank (<https://data.worldbank.org/>). Agriculture includes agriculture, forestry and fishing.
- (vi) Percentage of agricultural employment to total employment is from the World Bank (<https://data.worldbank.org/>).
- (vii) Percentage of female employment in agriculture to female employment is from the World Bank (<https://data.worldbank.org/>).
- (viii) Agricultural productivity is from the World Bank (<https://data.worldbank.org/>).

Note: The figures for the specified period provided in this RAP are based on simple average of available data across the years and countries in the region (Hub) during the period. In some cases, the figures for the Hub may be based only on some years during the period and/or only on some countries in the Hub.





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