



Facilitating the export of fruit and vegetables

The role of state institutions in Morocco

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Jörg Gertel and Sarah Ruth Sippel

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The social costs of eating fresh



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14 Facilitating the export of fruit and vegetables

The role of state institutions in Morocco

Mads Barbesgaard and Niels Fold

Introduction

Recent academic debates on the impacts on smallholders of neoliberal, export-orientated agricultural strategies have been considered within the conceptual and analytical framework of global value chain (GVC) dynamics.¹ Despite its analytical bias towards inter-firm transactions (cf. Bair, 2005), one line of research in GVC-inspired analyses aims to examine the gains of participation in GVCs for agricultural producers in the Global South (cf. e.g. Fold and Gough, 2008; Lee et al., 2012). This chapter seeks to uncover Morocco's and Moroccan producers' insertion in the GVC for fresh fruit and vegetables (FFV) by documenting how the role of national institutions in the two dominant sub-sectors (tomato and citrus) has altered as a result of changes in the international institutional environment along with the rise of lead firms in the EU market. Our argument is that the institutional framework has played a crucial role in the incorporation of mainly large-scale producers and the concomitant exclusion and marginalization process of smaller and less integrated producers. The inclusion of producers in a particular GVC, and their ability to learn how to comply with technical, organizational and other buyer requirements in order to add value to their products, is conceptualized as 'upgrading' in the GVC framework. Competing but overlapping categorizations for upgrading in agriculture have been proposed (cf. e.g. Gibbon, 2001; Ponte and Ewert, 2009). The aim of this chapter is not to dive into a detailed understanding of the nature of upgrading processes in Moroccan FFV sub-sectors but rather to understand the exclusionary effects of the upgrading processes and the crucial role of national institutions in designing and implementing upgrading mechanisms.

The first section describes how the GVC for FFV is increasingly controlled by the large retailers and supermarkets that dominate the EU markets and consequently have considerable control *vis-à-vis* the upstream actors in the GVC. The second section examines the institutional framework looking at changes in the EU trade regime, before moving on to the institutional set-up at a national scale following Morocco's independence in the third section. The last section finally uncovers the structural transformation that has occurred in the citrus and tomato agro-industries. We conclude that while the sector has certainly been