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**Ministry of Agriculture
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**Agriculture and Natural
Resources Office**

**CEREALS MARKETING REFORM PROJECT
(CMRP--PHASE II)**

QUARTERLY REPORT 6

**For the Period:
October -- December 1992**

by

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Report CMR--QR 6

USAID Cereals Marketing Reform Project

ACCOMPLISHMENTS OF THE SIXTH QUARTER (October-December 1992)

In this quarter, work was carried out on activities in all four of the CMR project's Phase II applied research themes and in the area of training.

Applied Research Theme 1: Future Competition in the Wheat Milling Industry

A large part of the work program defined for Phase II of the project involves predicting the potential impact of policy changes on the country's cereals milling industries and on future competition among products of these three groups of firms, collectively making up the milling portion of the wheat flour subsector.¹

Of the seven activities in the "wheat milling industry in competition" program, work was carried out on five of them during the quarter:

- o Qualitative assessment of consumer and industrial demand for the output of Moroccan flour mills;
- o Interviews with owners/managers of bread wheat mills about readiness and prospects for competition under free market conditions;
- o Conducting a second national survey of artisanal flour milling; and
- o Development of a linear programming "transportation model" to begin to assess major impacts on individual mills of subsector liberalization;
- o Design and pre-testing of an initial survey of Morocco's 50 or so industrial Durum Wheat and Barley mills.

1.1 Consumer and Industrial Demand for Moroccan Wheat Flour

This is the first activity under the ICEA-Enterprise subcontract and was completed during the quarter. It involved interviewing groups of female consumers (and separately industrial users) about their quality/price preferences and substitutions among the milled products (flour, semolina) of the three industrial channels, concentrating on the output of the industrial mills. In October, DAI personnel Ann McDermott and Najat Bouzri, assisted by ICEA staff member Gregoire Baudonnel, conducted these consumer panel

¹ This program of activities is described in greater detail in CMR Report No. 10, in CMR Working Paper No. 9, and in the previous quarterly report (October, 1992), pp. 2-3.

sessions with 27 groups of consumers in the following areas:

| | Urban | Rural | Total |
|--|-------|-------|-------|
| Central Region (Casa, Rabat, Meknes) | 11 | 4 | 15 |
| Eastern Region (Nador, Oujda) | 5 | 1 | 6 |
| Southern Region (Taroudant, Ouarzazate) | 2 | 4 | 6 |
| Total | 18 | 9 | 27 |

The results of these qualitatively-oriented demand investigations were reported in **CMR Working Paper No. 11** (Ann McDermott and Najat Bouzri, "*Caracteristiques de la Demande des Menages pour les Produits de Premiere Transformation du Blé*", Rabat, December, 1992"). The report looks at the major consumer uses of wheat flour (bread overwhelmingly dominant, followed by couscous, and other uses such as home-made sweets -- cakes, crepes, and cookies -- and soups), then at patterns of purchases, degree of consumer recognition of industrial brands, the aspects of quality sought for different products, and price/substitution relationships. The strong Moroccan consumer preference for hard wheat flour (alone or in mixtures) in bread was confirmed, along with major consumer discontent with the varying quality level of both FNBT and Farine de Luxe produced by the industrial mills. This and other findings indicate that the firms that make up the industrial flour industry would be likely to aggressively modify their product mix and quality level if allowed freedom in product marketing and in buying their own supplies of wheat.

Industrial flour demand interviews were conducted with a sample of bakeries in the areas where the consumer interviews were conducted.² The results of this work are reported in **CMR Working Paper No. 12** (Najat Bouzri and Gregoire Baudonnel, "*Caracteristiques de la Demande des Boulangers pour la Farine*", Rabat, December, 1992). Among the results discussed are the highly decentralized nature of the Moroccan bakery industry, the fact that certain bakeries make much more profit from their pastry making than from their breads (due to the controlled price structure for the five "official" types of bread), and the problems that bakers too have with highly variable industrial flour quality. There is a description of the use of additives to attempt to compensate for low quality flour and the fact that bread yield from 100 kilos of flour can vary between 535 and 630 200-gram loaves, depending on flour quality (a factor that obviously affects profit levels, particularly with fixed product prices).

These and other survey results will be incorporated into the strategic subsector

² To complete the picture of industrial demand for wheat flour, it will be necessary to conduct additional interviews with other "flour-using industries" (cookies, pasta, etc.). It is anticipated that this will be done in early February.

diagnostic report that will be produced in the first quarter of 1993.

1.2 Survey of Bread Wheat Flour Mills

This survey is being conducted under the sponsorship of the Moroccan Professional Millers' Committee, or CPM. The sample consists of those 30 or so mills for which detailed cost of production data from 1989 were already available from the CPM. The field teams are also being assisted by ONICL regional personnel to better understand local market conditions within which these enterprises are operating. The main objectives of this survey are:

- o to analyze the physical and financial position of a wide sample of mills;
- o to assess the preparedness of the mills for free market competition and their plans for the future; and
- o to develop a better picture of the six major regional flour markets in Morocco.

Approximately 25 of these interviews, taking approximately one person-day each to complete, were conducted in November and December by personnel from subcontractor Agro-Concept assisted by ICEA-Enterprise. Interviews are to be completed in January and the data they produce will be one of the most important elements in the diagnostic report and the informational program to be presented to the industry in April.

1.3 Artisinal Flour Milling

In June, 1992, the CMR project agreed with ONICL to contract with faculty at INSEA to undertake a second study of Morocco's 9,500 artisinal flour mills and the roles they play in competition with industrial flour mills. This applied research effort had three specific objectives:

- o In rural areas, to assess the impact of the 1991-92 winter drought on household use of artisinal mills and obtain a better picture of rural households' "coping strategies";
- o In urban areas, to get a more accurate picture of the larger scale, more sophisticated artisinal mills that, by having the capacity to produce mechanically sifted flour, are able to compete more directly with industrial mills; and
- o To obtain a picture of the evolution of the artisinal milling subsector since 1989.

A draft of CMR Report No. 13 (*Lahcen Achy and others, "Deuxieme Enquête National sur la Minoterie Artisanale: Rapport de Synthèse", Rabat, January 1993.*) was

completed during the quarter and this report was to be revised and a clean SPSS data set was to be provided for future analysis in January, 1993.

1.4 Development of an LP Model for the Milling Industry

The initial objective was to construct a linear programming model that contains the geographical location all the industrial soft wheat mills, to assess the likely first steps in decontrol of the industry: impacts of elimination or cut-back of transportation and/or storage subsidies on the financial position of mills in different parts of Morocco. During this quarter initial model results were presented to personnel at ONICL and a working group made up of ONICL personnel and Agro-Concept staff was charged with adding additional data on transport and other costs to allow the model to be as realistic as possible. This work continues into 1993.

1.5 Survey of Durum Wheat and Barley Industrial Mills

To complete data gathering on the wheat flour subsector, the project is assisting ONICL to undertake the first detailed survey of Morocco's 50 or so "*semouleries*" and "*orgeries*" (durum and barley mills). In December, Lahcen Achy of INSEA was engaged to help complete the design and testing of the survey questionnaire. It is anticipated that data collection will be done mostly by ONICL regional personnel in February. This "*filière*" (marketing channel) of the subsector has grown rapidly since durum wheat marketing was decontrolled in two steps (1982 and 1987) and has been an area of substantial private sector investment. These entrepreneurs have also led the way in the introduction of higher quality hard wheat flours and the use of new types and sizes of packages to better meet consumer demand.

Applied Research Theme 2: Impact Analysis of Subsector Policy Changes

An important task for the CMR project is the analysis of the likely impacts of anticipated policy changes on the agricultural economy or for key groups in the society. In the project's second year of work, in addition to the major effort devoted to the analysis of the wheat flour subsector (Applied Research Theme 1 above), three types of impact analysis are being undertaken:

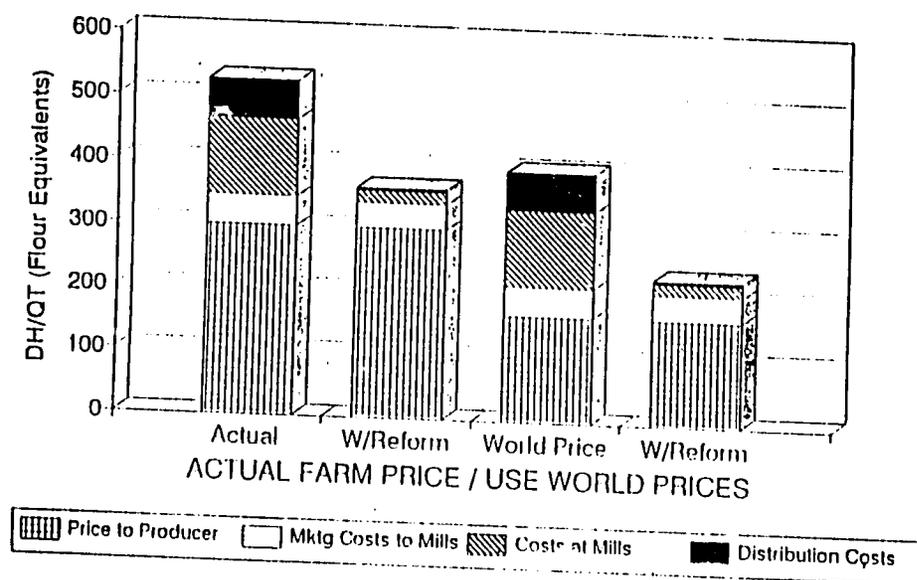
- o A summery estimate of aggregate financial and economic savings to the Moroccan economy of completing the reforms of bread wheat marketing;
- o A number of economic models to examine the impacts of changes in grain trading policy on domestic prices and stocks by region and by season; and
- o Analysis of alternatives to the GOM's current FNBT wheat flour subsidy program.

2.1 Estimation of Benefits from the Reform of Blé Tendre Policy

In November Lynn Salinger of AIRD began to construct a spreadsheet model that can be used to add up the aggregate financial and economic benefits to the GOM, to the economy, and to consumers of completing the planned liberalization measures in the bread wheat flour subsector. In December this effort was continued in Rabat with a committee of GOM staff.³ Initial analysis was narrowly focused on estimating the total, real marketing margin (including farm-gate to mill marketing costs, milling costs, and mill to consumer distribution costs) for the production of FNBT, if all the "hidden" costs (ONICL payment of transport and storage costs, "leakage" from the FNBT subsidy, etc.) are taken into account, and by how much this real marketing margin could be reduced if the controlled bread wheat marketing and FNBT subsidy systems were eliminated.

The results of this initial analysis are startling. In the graph below four cases are illustrated. First, if the "indirect costs" of producing FNBT are included, the total

REAL CONSUMER COST OF FNBT (With and Without Reforms, in DH/QT)



real cost of producing 100 kilos of FNBT is about 531 DH/QT. What happens when liberalization occurs? The biggest immediate change involves removal of the consumer subsidy. In fact, of 164 DH/QT of cost reductions in the first years after reform, 95 %

³ Mr. El Amrani of DPAB, Mme. Tagmouti of ONICL, and Mme Kahilija of DPV.

comes from the removal of the consumer subsidy:

| | |
|------------------------------------|-------------------|
| Total actual cost of 100 kg FNBT: | 531 DH/QT |
| Less Savings: | |
| Immediate efficiency savings: | 8 (5%) |
| Consumer subsidy savings: | 101 (62%) |
| Subsidy "leakages" (rents in FNBT) | 55 (33%) |
| TOTAL Savings: | 164 (100%) |

New Average Cost to Consumer of FNBT: 367 DH/QT

The figure of 367 DH/QT (Second column in Graph) represents what the average consumer would have to pay for FNBT in a free market with no subsidies. This is about 38% higher than what the consumer is currently paying and 84% higher than the ignored official price of FNBT. It should also be emphasized that these savings per quintal, also represent approximately \$180 million/year in aggregate additional resources that the GOM could devote to more targeted programs for poverty alleviation. These results are presented in more detail in **CMR Working Paper No. 10** (Lynn Salinger, "Bread Wheat Marketing Margins under Liberalization: A Cost-Benefit Analysis", Rabat, December, 1992).

If the GOM wanted to lower the price of FNBT in a free market, the main option would be to lower the variable levy on wheat imports, thus driving down the general price level of wheat in Morocco. The Graph also illustrates a somewhat extreme version of this option: Column three represents the price of FNBT (397 DH/QT) with the current subsidy and state-directed marketing in place, but having all grain go to mills at 167 DH/QT (in flour equivalent) which is approximately equal to the current world price for wheat, delivered to Casablanca (but with no import duties). Further, if the subsidy and controlled marketing systems were also removed, FNBT could be sold to consumers at approximately 233 DH/QT, lower than its current average price to consumers today (Graph, column 4).

The consequences of reducing the average producer price to 56 % of its current support level would undoubtedly be a reduction in the levels of Moroccan production of BT, difficult for the GOM to accept politically. However, these simple examples do illustrate the major factors at work in any decision to go ahead and implement the BT reforms. The GOM, in its decision-making, must more consciously begin to balance consumer and producer interests, as well as take into account marketing, processing and distributional efficiencies, and the "rents" associated with the current quota system for FNBT.

In addition, it is also likely that with freer markets, over time, there would be additional efficiency savings so it might be possible to envision an "average flour" (of much better and more consistent quality than now available) sold in Morocco for 250 DH/QT, with a 50 DH/QT real marketing margin, and a producer grain price at 160 DH/QT (200 DH/QT flour equivalent). This illustrates what would be a strongly

"consumer-oriented" policy. These rather simple model results will be refined over the course of the next six months.

2.2 Modeling Impacts of Trade Policy Changes on Domestic Prices

During this period several economic modeling efforts, identified as priorities in the first phase of the project, were begun at the Agricultural Economics Department of Purdue University. These models will be refined collaboratively with GOM personnel beginning in the first quarter of 1993. The overall objective of these efforts is to predict the likely consequences of eliminating the current producer support price for bread wheat and moving to a system where the only protection for national production of all four cereals will be border trade policies. Domestic price impacts will be estimated in two ways:

- o The first model will track the supply, demand, and annual equilibrium price of all four cereals based on randomly fluctuating world prices and domestic production and different approaches to border price protection. The stochastic portions of this model involve the averaging of model results from 100 random picks from probability distributions (shape of distributions can be varied, for example, to make national production at "drought levels" more or less likely) for domestic production and world price levels which are then combined with static assumptions about Moroccan cereals supply and consumption behavior. This produces figures on how frequently (out of a hundred years, for example) key price, production and consumption levels will deviate from threshold levels -- the key questions involved in food security modeling for Morocco; and
- o The second model, in contrast, will concentrate on inter-regional and inter-seasonal price variations based on transport costs, regional patterns of production and consumption, and assumed importing and storage behavior. Thus, while the first model looks at the aggregate situation from year to year, the second concentrates on how different annual situations vary across regions and across the seasons of the year.

2.3 Alternatives in Providing Targeted Food Subsidies to the Poor

It is clear that no matter how administratively flawed the GOM's *Farine Nationale de Blé Tendre* (FNBT) wheat flour subsidy system is, its reduction or elimination will have some negative impact on Morocco's poor. Therefore, the donor community to Morocco (particularly the World Bank under its new SAL II) has been conducting a dialogue with the GOM to identify opportunities for providing more targeted assistance to the poor. DAI staff economist and home office technical backstop to the CMR project, Ann McDermott, undertook several weeks of interviews and desk research in Washington on the experience of other countries in the Mediterranean basin in closer targeting of food subsidies. In addition to reviewing the most recent academic literature, she examined recent targeting experiences in Tunisia, Algeria, and Egypt, as well as in Morocco. Final

revisions were made to her **CMR Working Paper No. 7** in December. ⁴

Applied Research Theme 3: Strengthening Moroccan Cereals Production and Marketing Systems

As Morocco decontrols its main agricultural field crop subsectors (cereals, sugar, and oil seeds) as foreseen by reform programs such as ASAL II, it is clear that domestic production and marketing systems -- long sheltered from foreign competition and the need for aggressive innovation and investment -- will be at some disadvantage when domestic production is placed in more direct competition with imports. The implication is that there are things that the GOM can do -- in partnership with the private sector -- to optimize productivity in these domestic production and marketing systems.

For example, in cereals marketing, lack of appropriate grading standards and ONICL market manipulation, together, have left a legacy such that the quality of Moroccan cereal is inferior (cheaper) for Moroccan millers to that of imports. In addition, there has been inadequate or inappropriate investment in marketing (bulk transport and storage) and milling infrastructure. The thrust of this theme is to identify activities that can be undertaken by the GOM, in collaboration with private sector operators, to allow domestic cereals production to compete more equally with imports. This should be a high priority for MARA in preparing for market liberalization but, so far, virtually nothing of this kind has been undertaken.

The project has inadequate resources to fully tackle these topics, but can undertake initial study efforts to better define the dimensions and orientation of the work that could be done in the future.

3.1 Improving Grain Grading and Cereals Storage Systems

During the quarter, initial contacts were made with potential consultants (US and Moroccan) to work on these two topics. Detailed terms of reference will be developed for these topics during the next quarter with actual consulting to take place in the second quarter of 1993.

Grain grading is a complex topic from both theoretical and practical points of view. What CMR would like to accomplish over the next four or five months is to outline a prioritized plan of concrete steps that the GOM can undertake -- in collaboration with private operators -- that will result in future years in the private marketing system being able to deliver larger, more homogeneous, and higher quality lots of domestic cereal to the industrial mills at competitive prices.

Improving Cereals Storage Systems: One of the elements of an improved marketing system is storage. To date, the CMR project has concluded that Moroccan bulk

⁴ Ann K. McDermott, "Targeting Cereals Subsidies: Case Studies of Morocco, Algeria, Egypt and Tunisia", Rabat, December, 1992. (Report CMR-WP7.)

storage is inadequate at both the commercial and farm levels. At the commercial level, the amount, condition, ownership and location of current bulk silos is probably not sufficient for the needs of a future free trade in domestic and imported cereals. At the producer level (on or near the farm) as well, the amount of appropriate bulk storage is clearly inadequate to allow farmers to fully defend their interests in a competitive domestic cereals market.

The project, with current funding, will thus concentrate its efforts on two preliminary studies: (1) a macro-level overview of the adequacy of Moroccan bulk handling and storage facilities for a private trade organized around quality differences and the development of real marketing margins, and (2) provide detailed technical and economic evaluations for different types of bulk, on-farm storage systems and "identify" a project that could be submitted to different donors for the funding of on-farm demonstration and transfer of appropriate silo technology.

3.2 Cereals Marketing Reform and the Feed and Livestock Industries

AIRD agricultural economist Jeff Metzel, in October, completed a rapid assessment of the Moroccan livestock sector and its use of cereals and cereal-based feeds. This activity comprised several specific tasks:

- o To identify trends and policies in livestock feed use and in feed-grain imports;
- o To assess the current health of feed sector: its competitiveness, and reliance on international markets for primary feed inputs;
- o To evaluate the impact of cereals market policies on the feed industry and the livestock sector;
- o To analyze problem areas, such as the very high prices for both red and white meats in Morocco; and
- o To identify areas for further applied research in the area.

A revised draft of **CMR Working Paper No. 8** (Jeffrey Metzel, "The Impact of Cereals Marketing Reform on the Feed and Livestock Industries") was available by early November. Among the most important tentative policy recommendations in this paper is that the GOM should change its import policies to allow for the unrestricted importing (except for appropriate levels of variable levy) of maize and barley used for feed purposes. This, plus the GOM's heavy subsidization of manufactured ruminant feeds (part of the current *Programme de Sauvgarde de Cheptel* -- likely to be continued for a second year due to a poor anticipated 1993 harvest), suggest that these issues should be subject to additional, detailed economic and technical analysis in the near future.

Applied Research Theme 4: Institutional Change in Support of Cereals Policy Reform

There are a variety of changes that will take place in both public and private institutions as Morocco develops freer cereals markets. To date the CMR project has focused on three areas of needed change:

- o Changes in the structure and functioning of ONICL in order for it to be supportive of a private cereals trade;
- o Changes needed in MARA to reorient its efforts in data collection and analysis to be compatible with and supportive of private market development;
- o Changes that will likely occur in private cereals trading to promote greater efficiency and to provide regular market users more access to appropriate risk reduction mechanisms.⁵

4.1 Future Market Development

During the term, CMR collaborator Abderrahim Houmy of DPAAE, wrote the first draft of a paper in which he spells out a likely vision of future liberalized Moroccan cereals markets and ideas concerning the appropriate roles that the GOM might play in aiding that private development. The project will continue in the months to come to develop the "vision" of future market environments.

4.2 CMR Work in Cereals Prices

Creating a Cereals MIS: The project in 1992 had provided assistance to MARA and ONICL in the design of improved MIS (Market Information Systems) for Moroccan cereals (CMR Report No. 9 and CMR Working Paper No. 4). Taking the next steps to develop the cereals MIS were put on hold until some basic decisions were made in MARA on the division of responsibilities for this activity (also addressed in CMR Report No. 12). In October, MARA officials decided to give ONICL the major responsibility for cereals price data collection while allocating responsibility for maintaining a crop price data bank to the MARA "Cellule de Prix" (a unit involving personnel from two MARA divisions, DPV and DPAAE). While not all the dimensions for the future dissemination of "market news" have been worked out, enough progress was made to allow the CMR project to continue to support this activity. An experienced MIS consultant has been located who will begin to assist the cereals MIS -- both in ONICL and in MARA -- by the end of the next quarter.

Accessing International Cereals Price Data: ONICL uses a variety of sources

⁵ Ironically, the development of private markets often increases price volatility as a means of efficiently reallocating resources in agricultural production and marketing. This greater price variation then gives rise to mechanisms that some market actors use to reduce the risk exposure for their own businesses.

to get up-to-date international cereals price information to use in "organizing" the country's cereals imports. Until recently it received international market news from Reuters by daily telex. When this service was discontinued there was a substantial delay until Reuters was able to install the needed equipment to sell this information to its customers through a proprietary satellite transmission system. This new system provides both market news and outlook analyses, but has the double disadvantage of being quite expensive and only delivering data on paper (and not in more useful electronic computer files).

During this quarter CMR COP Wilcock, with temporary help from a communications consultant, connected one of the project's office computers to Morocco's new Packet Data Switch (MAGHRIPAC) in order to improve communications with DAI's home office in Maryland but also to experiment with alternative means of electronically receiving international cereals market news. Through the use of MCI-Mail (available at MAGHRIPAC with a local telephone call), two ways of accessing price data in "close-to-real time" were demonstrated to ONICL and MARA personnel:

- o US futures prices for wheat, corn and barley were accessed through the commodity market news service of Dow Jones News/Retrieval and billed through MCI-Mail; and
- o Similar market reports were automatically downloaded as Electronic Mail (E-Mail) messages four times a day, through Internet, from a pilot USDA/Extension Service project called "Almanac" (located at Oregon State University). These E-Mail messages were sent to the CMR project mail box on MCI-Mail.

Based on these experiences, we can draw a few summary conclusions on how ONICL or private Moroccan grain traders can obtain international cereals reference prices, and other market news or analyses:

- o With a little additional experimentation, Moroccan users should be able to electronically receive international cereals price information (from US, European or Asian markets) directly through packet data transmission at rates substantially cheaper than those offered by the major commercial services;
- o To correctly use packet data transmission in Morocco, interested institutions (ONICL, MARA, larger private traders) should obtain a leased data line from PTT/MAGHRIPAC, and the hardware and software needed for higher speed, synchronous transmission; and
- o For the moment, market news may be obtained most easily as automatically-generated electronic mail messages using a commercial E-Mail service. The larger international grain companies undoubtedly have set up alternative computerized data transmission systems that may be accessible to some degree by their Moroccan affiliates. For the moment the

cheapest alternatives involve receiving market news directly from public suppliers rather than through private information "repackagers".

5. CMR Training Activities

5.1 Short-Term Training

The CMR project, about a year ago, provided small amounts of funding to three Masters-level (3eme Cycle) agricultural economics students at ENA (*l'Ecole Nationale de l'Agriculture*) in Meknès, to do their thesis work on topics related to CMR interests. These students defended their work in December, with COP Wilcock participating as a member of each "jury":

- o Ali Abidar, "Estimation de Déterminants de la Demande en Farine de Blé: Cas de Wilaya de Meknès";
- o Ali Zahri, "Estimation des Coûts de Production et Indices de Fonctionnement de l'Industrie Meunière: Cas de Meknès";
- o Mohamed Drissi, "Economie du Stockage des Céréales dans la Région de Meknès".

5.2 Long-Term Training

The project's three long-term trainees continue to make good progress in their Master's degree training programs in the Department of Agricultural Economics at Purdue University. Mr. Imrani of MARA/DPAE, focusing on international agricultural trade modeling, will finish his program in approximately one year. ONICL employees Kchit and El Harti, focusing on international and domestic cereals prices respectively, will finish in about a year and eight months after post-graduate applied training programs at USDA/Washington.

UPDATE ON FINANCIAL STATUS OF CMR

The CMR Project, by the end of the sixth quarter, has spent approximately 57 percent of contract funding. A detailed budget summary by major line items will be provided to USAID under separate cover as well as budget projections for the remaining 19 months of project life.

ANNEX

BIBLIOGRAPHY OF CMR DOCUMENTS

Major CMR Reports

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- CMR-4 Abderrahim Houmy et.al., "Tendances de la Production des Céréales au Maroc", Rabat, Final version: October, 1992 (In French only).
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- CMR-6 Lynn Salinger et.al., "Commerce Extérieur, Rapport de la Première Phase", Rabat, Final Version: March, 1992 (In French only).
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- CMR-8 David C. Wilcock, "Synthesis Report: CMR Phase I", Rabat, February, 1992 (In English and French).
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- CMR-10 Claude Falgon, "La Minoterie en Concurrence" (Plan d'Etudes Appliqués), Rabat, May, 1992 (In French only).
- CMR-11 (DRAFT) Charles Steedman et Hassan Benabderazzik, "Sécurité Alimentaire et Réforme des Marchés Céréalières", Rabat, Juin, 1992 (In French only).
- CMR-12 Benatya, Driss et.al., "Agricultural Data Needs of the Moroccan Ministry of Agriculture", Rabat, July, 1992 (In English and French). NB: This report was jointly sponsored by three USAID Agriculture Sector Projects: No. 182 (PESA), No. 191 (CMR), and No. 210 (MAP).

CMR-13 Achy, Lachen et.al., "Deuxième Enquête National sur la Minoterie Artisanale", Rabat, January 1993 (In French Only).

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- CMR-QR2/3 David C. Wilcock, "The Cereals Marketing Reform Project: Quarterly Reports 2 and 3", Rabat, April, 1992 (English and French).
- CMR-QR4 David C. Wilcock, "The Cereals Marketing Reform Project: Quarterly Report 4", Rabat, July, 1992 (English and French).
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- CMR-QR6 David C. Wilcock, "The Cereals Marketing Reform Project: Quarterly Report 6", Rabat, January, 1993 (English and French).

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- CMR-WP6 Philip Abbott, "Agricultural Trade Modeling: Report on Training Course and Current Modeling Efforts", Rabat, June, 1992 (In English only).
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