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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 4

for the period:
April--June 1992

by

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COP

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USAID Cereals Marketing Reform Project

ACCOMPLISHMENTS OF THE FOURTH QUARTER (April-June 1992)

This quarter has been a busy one for the cereals marketing reform project, with much of the work focused on initial steps in the design and execution of the Phase II applied research program. These activities are reported under two headings: technical assistance and training.¹

Technical Assistance

During the quarter there were 10 separate technical assistance activities undertaken or begun. These involved 14 different consultants paid with project funds by DAI, subcontractors, or other collaborating institutions. Thirty-six person-weeks of consulting work were undertaken during the quarter, in addition to the full-time efforts of the resident chief-of-party. This means that, on the average, there were at least three consultants working on CMR business in Morocco at any one time during the quarter.

1. Design of Market Information System for Moroccan Cereals

DAI consultant R. Bruce Schulte assisted personnel from ONICL and MARA/DPAE (SEE and SSD) in the conceptualization and design of an improved system for the collection and dissemination of market price information for domestic cereals. The proposed system, called the SIM ("système d'information sur le marché"), has the following important characteristics:

- o It is designed to be "demand-driven", collecting and diffusing information that is needed by users in the private sector cereals trade or in various GOM departments;
- o It will make maximum use of the latest telecommunications technology to assure rapid and accurate price reporting and accumulation of information in a publically-accessible data base in the Ministry of Agriculture; and
- o It will produce both "market news" (relatively undigested market price information diffused within a period of no more than several days, primarily by radio or newspaper) and information that can be used in the production of more analytical "market outlook" reports.

Before the GOM can begin the year-long development phase of the SIM, there is a

¹ For more detail on the origins and objectives of the CMR project see David C. Wilcock, "The Cereals Marketing Reform Project: Quarterly Report 1" (Report CMR-3), October, 1991.

major institutional question to be resolved. A decision must be made by MARA on where the cereals price data collection activity should be located, whether in ONICL, in DPAA/SSD, or in the newly-created joint DPV/DPAE "cellule des prix". It does not make sense to undertake additional training or technical assistance activities related to the SIM until this problem is resolved.

An overview of the functions to be played by market information systems for farm commodities is contained in CMR Report No. 14 (Bruce Schulte, "Agricultural Market Information Systems", May, 1992). CMR Report No. 15 is the development "action plan" for the SIM for Moroccan cereals. (See the bibliography of Project Documents in Annex 1.)

2. Reducing the Risk of Price Increases for Moroccan Cereals Imports

CMR COP Wilcock and personnel from ONICL provided assistance to a World Bank consultant, Dr. Ronald Anderson (Department of Economics, University of Louvain, Belgium), in the completion of his assignment of gathering information on the possible use of risk reduction methods (particularly taking hedging positions on foreign futures markets) in reducing import price risk and the development of stronger, more predictable domestic cereals markets. Dr. Anderson's paper ² was one of a number presented at a three day seminar on risk reduction in agricultural markets, organized in Paris by the World Bank, June 3-5, 1992, and attended by Wilcock and DPAA/SEE agricultural economist, Abderrahim Houmy.

3. Initial Assessment of Cereals Storage Needs

DAI consultant, agricultural engineer Henriot Sabourin, devoted about ten days to an initial examination of the current situation in the commercial storage of cereals in Morocco. He focused both on technical issues (such as the need for the proposed silo in the port of Agadir and priorities in the rehabilitation of the one of the two silo complexes owned by the Meknes SCAM), and on economic/technical issues, particularly on the need for increased use of modern bulk handling and storage facilities at the farm level. One of the more important recommendations of his trip report (CMR Report No. 17, "Rapport Technique: Diagnostic du Volet Stockage) was that CMR contribute to the sponsorship of a pilot program in the development of appropriate on-farm storage techniques in conjunction with important technical research that has been conducted over the past few years by Moroccan agricultural engineer El Houssine Bartali of IAV Hassan II. This recommendation will be discussed with the CMR technical committee in July but it does seem to have real merit for the following reasons:

- o The amount of modern grain storage and handling capacity at the farm level in the more important cereals production zones is clearly insufficient;

² Ronald W. Anderson, "Case Study: Risk Management In Morocco's Cereals Subsector", Paper Prepared for: IBRD Seminar on Risk Management in Liberalizing Economies: Issues of Access to Futures and Options Markets, Paris, June 3-5, 1992.

- o In the context of cereals market liberalization, a government effort to provide some support to the development of on-farm storage (applied research, extension programs, or even special lines of credit for facility construction) would be viewed very positively by farm groups who feel they will be disadvantaged by the reform program, particularly elimination of the BT (Blé Tendre) support price; and
- o This is a program, once technical solutions are demonstrated and policy barriers removed, that can be implemented by the private sector.³

Increased investment in modern storage facilities, at all levels within the cereals subsector, will be dependent on the development of significant seasonal price differentials that, for BT at least, will only be possible once the remaining controlled marketing channel is dismantled. However, once there is both free domestic trade in wheat and the opportunity for private parties to freely import cereals, it is quite likely that the current amount, location, and ownership of both port and interior storage will not allow for optimal trade from a logistical point of view. This is a condition which may further slow progress toward liberalization if not addressed. In the interior, a major part of this problem is the future disposition of the SCAM/CMA storage facilities; in the ports it involves the adequacy of existing silo facilities for future imports requiring even more segregation of cereals in lots by quality.⁴ It is proposed that these issues be added to the CMR/ONICL/IAV joint storage research program proposed for the fall of 1992.

4. Modeling Potential Impacts of Cereals Liberalization

Purdue University Professor Philip Abbott, while in Rabat to teach a three week course on trade modeling (see training section below), assisted the project in further defining approaches to be used in the economic modeling of impacts of both reform measures (such as the elimination of the current GOM program of "primes de stockage et de transport" for BT) and of policy options in matters such as the type of border protection system to use for cereals (fixed tariff rate, variable levy, etc). The three modeling efforts that will be undertaken as part of CMR Phase II are the following:

- o A linear programming "transport model" will be developed by ONICL and Agro-Concept to initially investigate what the elimination of the current "péréquation" transport subsidy on BT and flour will do, *ceteris paribus*, to the competitive position of Morocco's 82 industrial flour mills. The model, once developed, will allow other optimization and impact questions to be addressed;
- o A simulation model will be developed to assess the likely outcomes of the

³ Such a technology demonstration and private sector delivery program might very well be of interest to AID/Morocco's new Agribusiness Promotion Project. This investment possibility has apparently drawn preliminary interest from other donors as well.

⁴ CMR is indebted to James Fry of Landell Mills, working on a World Bank agro-industry study in Rabat in June 1992, for this important observation.

two major options for cereals border protection, the current variable levy system and the "full tariffication" approach felt to be a likely outcome of any GATT agreement. Key exogenous variables, world price levels and the level of domestic cereals production, will be determined stochastically, and the model solved through repeated simulations. This model will be developed initially at Purdue University by Dr. Abbott with the help of Moroccan graduate students; and

- o A model will be developed to study the likely seasonal price patterns for domestic cereals to assess the adequacy of incentives for storage (the likely seasonal gap between interior and border prices). Under the variable levy system, the two major policy options are an administered seasonal adjustment to the border price or a post-harvest decline in interior cereals prices.

Dr. Abbott's methodological observations are contained in his May, 1992 trip report (CMR Report No. 19).

5. The Industrial Flour Milling Industry in Competition

DAI consultant, Cluade Falgon (ICEA-Entreprise, Paris), spent two weeks in Rabat defining a program of applied research studies of the wheat flour subsector that will begin in mid-September, 1992. The general question being addressed is what is likely to happen to the firms making up Morocco's wheat flour industry as they move from an ONICL-administered system to free market conditions on both the input (wheat supplies) and output (flour) sides. Dr. Falgon proposed (In CMR Report No. 16, *La Minoterie en Competition*) that, in addition to the three other milling studies by ONICL and the CMR project⁵, that the following information collection actions be undertaken:

- o Focus group study of main characteristics of consumer demand and substitution among different flours (BT and BT industrial and artisanal flour and semoules) and flour products (commercial breads, cous-cous, pasta, etc.). Guided group discussions will be held with consumers at different income levels, in both urban and rural portions of different regions in Morocco;
- o Quality and price data will be systematically collected at wholesale and retail levels in areas where consumer information is collected; and
- o All industrial mill owners will be interviewed by senior staff members to provide a qualitative assessment of their preparedness for open competition and the likelihood of their survival.

⁵ The INSEA artisanal milling study (point 6), an in-house ONICL study of the rapidly-increasing number of hard wheat "semouleries", and the LP transport model (point 4).

The results of these information collection efforts (in addition to other available information) will be compiled in a report on the strategic development of the industry. This report will serve as the basis of regional educational meetings that will be held for milling industry personnel in two or three locations in Morocco in early 1993.

6. Artisinal Flour Milling

In June, 1992, the CMR project agreed with ONICL to support faculty and students at INSEA in undertaking a repetition of the 1989 study of Morocco's almost 10,000 artisinal flour mills and the roles they play in competition with the industrial flour mills. This applied research effort, results of which will be available in the fall of 1992, has 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 household's "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 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.

7. Moroccan Cereals Market Liberalization and Food Security

Due the recent winter drought (November 1991-February 1992) Morocco's predicted 1992 harvest for the four major cereals is 2.7 million tons, which would represent only 32 percent of the 1991 harvest of 8.5 million tons (a record level but nearer to the trend line of recent years). In this context, DAI consultant Charles Steedman (Center for Research on Economic Development, University of Michigan) and Agro-Concept's Hassan Benabderrazik devoted a month to producing a first draft of a CMR position paper on the role of cereals in Moroccan food security and the potential impact of market liberalization on the "food security equation" and the possible options in the use of compensatory measures, such as GOM-sponsored grain stocks. This paper (CMR Report No. 18, *Sécurité Alimentaire et Réforme des Marchés Céréalières*) will be used to advance the debate of these important issues in GOM circles. Among the more important topics discussed in the paper are the following:

- o The fact that food security involves both questions of the physical availability of food in the system and the financial ability of the population to access food supplies. This means that a big part of food security in any country involves issues of poverty and the ability of the poorest groups to access food supplies. In Morocco a key issue involves the tradeoff between lower flour prices for all consumers and higher support prices for a certain group of wheat producers;

- o From summary data available from the ENNV, the team found that the elimination of FNBT would only have a relatively small impact on the average food expenditure of the poorest fifth of both the urban and rural populations. The question that must wait for further data analysis is the potential impact of subsidy elimination on the very poorest parts of the lowest quintile; and
- o The team enumerated a set of questions that need to be addressed further in order to define GOM options for holding some form of wheat security stock, at least during the transitional period to a freer cereals market.

8. 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 dialoguing with the GOM to try and identify opportunities for 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. These will be discussed with Moroccan colleagues and will serve as the basis for a forthcoming CMR working paper.

9. Consumption Patterns for Cereals and Cereals Products

AIRD President Dirck Stryker spent two weeks in Rabat undertaking initial meetings with personnel in the Ministry of Plan and in MARA regarding the analysis of household data from the recently completed (1990-1991) Living Standards Measurement Survey ("LSMS" or "ENNV" in French), conducted by the *Direction de la Statistique* in the Ministry of Plan. His work is being jointly sponsored by CMR and other AID project 191 funding channeled through the central CAER (Consulting Assistance in Economic Reform) project.

For CMR, central issues that can be addressed by this data analysis are levels and patterns of consumption of grain, flour (including FNBT), and flour products by Moroccan urban and rural households at different income levels and in different parts of the country. This will allow analysis, for example, of the relative importance of FNBT and the impact that its elimination would have on the welfare of different socio-economic groups, particularly the urban and rural poor.

10. Needs for Agricultural Statistical Data in Morocco

The needs of Morocco's public and private sectors for good-quality agricultural statistics have changed in recent years, in large measure due to:

- o Changes in GOM policy orientation with more emphasis on agricultural development being led by the private sector;
- o Changes in computer data processing and communications technologies, creating new opportunities for the production of useful information; and
- o Changes in the professional training of MARA staff with a much larger number of economists, who need different types of information to do their work.

In addition, analysts undertaking economic policy studies for CMR and for other projects and GOM offices, have encountered serious problems in the lack of appropriate information on the economics of Moroccan agriculture. For these reasons, three AID projects working with MARA (CMR, the 182 institutional strengthening project, and the new MAP project), combined resources to undertake a review of Morocco's public and private agricultural data needs, and current and future data collection and dissemination systems for this information.

CMR COP Wilcock, in collaboration with the 182 project coordinator, drafted the terms of reference for this study, and recruited the three US and three Moroccan consultants who were given the assignment. The CMR project paid for all the expenses of data collection specialist Thomas Zalla and part of the expenses of study team leader, Dr. Wally Tynes, Head of the Agricultural Economics Department at Purdue University. The study team will produce a report on data needs that will be discussed with the MARA leadership in early July.

CMR Training Activities

The project's three long-term trainees continue to make good progress in their Master's degree training programs. ONICL employees Kchit and El Harti spent their first term at the Economics Institute in Boulder, Colorado, and anticipate transferring to the Agricultural Economics Department at Purdue University to join the ever-expanding community of Moroccan students.

Among the short-term training activities undertaken during the quarter are the following:

- o Dr. Philip Abbott of Purdue taught a three week course on international agricultural trade theory and computerized trade modeling to approximately 20 staff members from MARA (DPAE and DPV) and ONICL. It is anticipated that some of those in the training course will be active in the policy impact modeling described above in Technical assistance point 4;
- o The CMR project paid for 3 trainees to attend a three week international training course on cereals storage conducted by IAV Hassan II;
- o The CMR project made a small grant to support the "3eme cycle" thesis

research of three agricultural economics students from ENA, Meknes. These three students were to conduct research in the Meknes region on cereals and flour demand, competition between industrial and artisanal flour mills, and the economics of current and future cereals storage systems. In addition, a fifth year student from the ENA agricultural economics department received a small grant from CMR to assist Agro-Concept in the early development of the linear programming "transport model" (point 4 above);

- o Much of the support provided to INSEA to conduct the second artisanal milling study will be directed to approximately 20 advanced students of statistics and applied economics; and
- o DPAE staff member Abderrahim Houmy attended a three day workshop on "Risk Management in Liberalizing Economies: Issues of Access to Futures and Options Markets" organized by the World Bank in Paris. The discussions and output of this workshop, particularly the Anderson paper cited above in point 2, have been very helpful in defining a CMR position on the use of risk-reduction measures as part of the process of liberalization of Moroccan cereals markets.

ISSUES IN PROJECT MANAGEMENT

In contrast with past reports, there are fewer administrative issues in report for the fourth quarter of project Implementation. There is one issue that has been discussed with DPAE management and that concerns the **limited participation by DPAE staff in project activities (except training) during the quarter**. This was partly due to the fact that most staff members participated in two three week training programs during the quarter and, during the rest of the time, were very busy with the preparation of documents for various international meetings and other donor studies. It is also perhaps partly due to the fact that the type of subsector and marketing studies being undertaken in Phase II of CMR do not correspond very well the administrative organizational chart of DPAE. However, it is also partly due to the project being viewed as a part-time responsibility by numerous staff members. Resulting from these observations, preliminary discussions have been held with DPAE management to undertake two remedial actions:

- o Assign perhaps two staff members to the project on a full-time basis with others available on an occasional basis;
- o Look seriously at the need to create a Marketing and Subsector Studies Branch within the Economic Studies Section of DAE to be able to give these studies the attention they deserve. As the GOM moves to much greater reliance on free market mechanisms this type of marketing or "filière" study will become more and more important within MARA.

The other issue that is more far-reaching for the CMR project is the **lack of**

progress on the cereals reform agenda. The CMR project has a dual mission to (a) undertake studies that help to inform the process subsector liberalization but also (b) to use seminars and others means of information dissemination to help advance the process of reform (or, once policy decisions are taken, to assist in planning transitional measures to help attain policy goals in a practical manner). In the case of cereals, while various commitments have been made by the GOM in the context of agreements with the World Bank or in anticipation of other national (new Foreign Trade law) and international (GATT) agreements, many of the implementation decisions have not been undertaken.

These are sensitive issues politically and, to some extent, decisions of this type in Morocco are often put off due to the current political situation ("la conjoncture"). For example, the growing effects of the 1991-1992 winter drought on domestic cereals availability and prices make mid-1992 a less desirable time to begin to reduce the FNBT consumer subsidy. Further, pending national elections also induce (as in the US) a certain "temporary public policy paralysis". It is important that these issues be addressed directly as part of an evaluation of the CMR project planned for Fall 1992.

Update on Financial Status of CMR

The CMR Project, by the end of the fourth quarter, has spent approximately 36 percent of contract funding. The details by main budget line items are contained in Table 1 on the next page. Certain categories of expenditure, such as training, are running behind since the long term trainees have only been in the US for a few months and, in the case of one of them, training costs are being covered by USAID until the end of September, 1992. The majority of the budget is in various categories of technical assistance. Spending has been fairly uniform across the prime contractor and AIRD in the US and Agro-Concept in Morocco. Purdue University had not been spending its part of the budget as rapidly as the other partners but this is partially explained by slower billing procedures by the University and the fact that various recent assignments have not been billed.

More detailed budget projections will be made before the end of the next quarter to isolate those budget amounts that will not likely be spent by the end of the first two years of the project when the presence in Morocco of the long term advisor is scheduled to end. This information should be useful in discussions of the third year of the project (through September 1994) that can take place with MARA and USAID once the mid-term evaluation of the project is conducted in October or November of 1992.

QUARTERLY REPORT 4

TABLE 1

CMR BUDGET SITUATION

CONTRACT NO 608-0191-C-00-0047-00

JULY 1992

CATEGORY	BUDGET AMOUNT	INCEPTION TO LAST REPORTED PERIOD (THRU JUNE 92)	THIS PERIOD APRIL 92 THRU JUNE 92	CUMULATIVE AMOUNT	PERCENT OF BUDGET EXPENDED
1. TECHNICAL ASSISTANCE					
DAI COSTS					
SALARIES	\$360,195	\$88,240	\$47,085	\$135,325	38%
FRINGE BENEFITS	\$31,353	\$12,913	\$5,323	\$18,236	58%
OVERHEAD	\$278,305	\$73,635	\$38,267	\$111,902	40%
TRAVEL & TRANS.	\$85,502	\$42,428	\$11,918	\$54,346	64%
ALLOWANCES	\$162,026	\$61,472	\$16,316	\$77,788	48%
SUBTOTAL	\$917,381	\$278,688	\$118,908	\$397,596	43%
FEE	\$61,383	\$18,505	\$7,896	\$26,400	43%
TOTAL TA DAI COSTS	\$978,764	\$297,193	\$126,804	\$423,997	43%
SUBCONTRACT COSTS					
PURDUE	\$193,306	\$14,422	\$10,167	\$24,589	13%
AIRD	\$203,795	\$74,326	\$4,594	\$78,920	39%
AGRO-CONCEPT	\$112,651	\$41,495	\$6,371	\$47,866	42%
SUBTOTAL	\$509,752	\$130,243	\$21,132	\$151,375	30%
FEES	\$33,644	\$8,648	\$1,403	\$10,051	30%
TOTAL SUBCONTRACT COSTS	\$543,396	\$138,891	\$22,535	\$161,426	30%
2. TRAINING					
SEMINARS AND TRAINING	\$306,000	\$8,701	\$10,448	\$19,149	6%
SUBTOTAL	\$306,000	\$8,701	\$10,448	\$19,149	6%
FEE	\$20,318	\$578	\$694	\$1,271	6%
TOTAL TRAINING COSTS	\$326,318	\$9,279	\$11,141	\$20,420	6%
3. DIRECT COSTS					
OTHER DIRECT COSTS	\$35,896	\$10,511	\$3,462	\$13,973	39%
PROJECT SUPP. COSTS	\$200,168	\$95,517	\$26,036	\$121,553	61%
SUBTOTAL	\$236,064	\$106,029	\$29,498	\$135,526	57%
FEE	\$15,675	\$7,040	\$1,959	\$8,999	57%
TOTAL DIRECT COSTS	\$251,739	\$113,069	\$31,456	\$144,525	57%
GRAND TOTAL	\$2,100,217	\$558,431	\$191,936	\$750,368	36%

ANNEX

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