

*Feasibility Study on Water Resources Development in
Rural Area in
the Kingdom of Morocco*

Final Report

Volume III Supporting Report (1)

Basic Study

Supporting Report III

Socio-economy

**FEASIBILITY STUDY
ON
WATER RESOURCES DEVELOPMENT
IN
RURAL AREA
IN
THE KINGDOM OF MOROCCO**

FINAL REPORT

**VOLUME III
SUPPORTING REPORT (1)
BASIC STUDY**

**SUPPORTING REPORT III
SOCIO-ECONOMY**

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SUPPORTING REPORT III

SOCIO-ECONOMY

III1 Administration

The Kingdom of Morocco is a constitutional monarchy. It has 16 regions, which consist of 50 provinces and 17 urban prefectures. They are further divided into 160 Circles consist of 1,544 Rural and Urban Communes. The capital of Morocco is Rabat. The locations of the major cities and provinces are shown in Figure III1.1.1

III2 Population

III2.1 Population of Morocco

The total population of Morocco was 26,073,717 according to the latest population census in 1994. Population censuses were conducted in the years of 1960, 1971, 1982, and 1994. The results of the censuses are summarized below.

Population of Morocco, Urban and Rural					
Year	Urban		Rural		Total Population
	Population	%	Population	%	
1960	3,389,613	29.1	8,236,857	70.9	11,626,470
1971	5,409,725	35.1	9,969,534	64.9	15,379,259
1982	8,730,399	42.7	11,689,156	57.3	20,419,555
1994	13,407,835	51.4	12,665,882	48.6	26,073,717
Average annual growth rate (%)					
1960-1971	4.3		1.8		2.6
1971-1982	4.4		1.5		2.6
1982-1994	3.6		0.7		2.1

Source: Recensement 1994, Les Caracteristiques Socio-economiques et Demographiques de la Population, Niveau National

Population growth in urban area is remarkably high all through the period from 1960 to 1994. It is probably due to influx of rural population into urban areas. Because of draughts in these decades, rural population might have moved to urban areas for jobs.

According to World Development Indicator 2000 published by World Bank, total population of Morocco is estimated at 27.8 million in 1998 and 35.3 million in 2015. Average annual population growth rate for the period from 1998 to 2015 is estimated at 1.4% per annum. If we assume that the same trend of the population growth continues until the year 2020, the total population of Morocco is estimated to be 37.8 million in 2020 and it is more than 30 % larger than the present population.

III2.2 Population in the Study Area

The population of the provinces and prefectures located in the zones defined in this study is shown in Table III2.2.1 and summarized below.

Population of Provinces and Prefectures in the Study Area

Zone	Population in 1971 (1,000)			Population in 1982 (1,000)			Population in 1994 (1,000)			Annual growth (%) 1971 - 1982			Annual growth (%) 1982 - 1994		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Zone I	887	2,240	3,127	1,325	2,622	3,947	2,094	2,950	5,044	3.7	1.4	2.1	3.9	1.0	2.1
Zone II	2,187	617	2,804	3,306	731	4,037	4,566	727	5,293	3.8	1.6	3.4	2.7	0.0	2.3
Zone III	1,033	3,583	4,616	1,692	4,201	5,893	2,547	4,624	7,171	4.6	1.5	2.2	3.5	0.8	1.6
Zone IV	179	1,346	1,525	386	1,599	1,985	896	1,739	2,635	7.2	1.6	2.4	7.3	0.7	2.4
Zone V	51	370	421	101	421	522	206	433	639	6.4	1.2	2.0	6.1	0.2	1.7
Total	4,337	8,156	12,493	6,811	9,575	16,386	10,310	10,473	20,783	4.2	1.5	2.5	3.5	0.7	2.0

Population growth of urban areas in Zone IV and Zone V is remarkably high with annual growth rates at more than 6%. On the contrary, population growth rate of rural area is low in almost all areas during the last decade.

Table III2.2.2 shows the population and the number of households by the provinces and prefectures in the Study Area. The table shows that average family size in urban area is 5.3 persons while that in rural area is 6.6 persons. The population projection made by Direction de la Statistique is presented in Table III2.2.3 and summarized below.

Population Projection by Provinces and Prefectures in the Study Area

Zone	Population Census in 1994 (1,000)	Population Projection (1,000)		Average Annual Growth Rate (%)		
		2000	2010	1994-2000	2000-2010	1994-2010
Zone I	5,044	5,532	6,340	1.6	1.4	1.4
Zone II	5,293	5,932	7,148	1.9	1.9	1.9
Zone III	7,171	7,727	8,561	1.3	1.0	1.1
Zone IV	2,636	2,683	3,267	0.3	2.0	1.4
Zone V	639	684	750	1.1	0.9	1.0
Total	20,783	22,558	26,066	1.4	1.5	1.4

Higher population growth is estimated for the provinces and prefectures in Zone II, which includes such cities as Rabat and Casablanca. On the contrary, the lowest population growth is estimated for Zone V, the driest area among five zones. Population growth rates of Zone III and V from 2000 to 2010 are lower than that of national average estimated by World Bank as discussed above.

III3 Labor Force

Economically active population is defined as persons aged 7 years and over who are working and persons aged 15 years and over who are working or looking for a job. The economically active population of Morocco was 8.3 million and it accounted for 32% of total population in 1994 as shown below.

Economically Active Population in 1994 (1,000 persons)

1994	Economically active population			Inactive Population	Not Stated	Total	Unemployment rate
	Employed	Unemployed	Sub-total				
Male	5,653	927	6,580	6,201	1.1	12,782	14.1%
Female	1,348	405	1,753	11,315	0.4	13,068	23.1%
Total	7,001	1,332	8,333	17,516	1.5	25,850	16.0%

Source: Recensement 1994, les Caracteristiques Socio-economiques et Demographiques de la Population, Niveau National, Direction de la Statistique, Morocco.

The population of economically active women is small at 1.75 million and it accounts for only 13% of total women's population.

Unemployment ratio of Morocco was high at 16% in 1994. Women's unemployment ratio was remarkably high at 23.1%. Unemployment of Morocco in 1982 and 1994 is as shown below.

Unemployment of Morocco in 1982 and 1994(1,000 persons)

	Male			Female			Total		
	1982	1994	Growth rate (82-94)	1982	1994	Growth rate (82-94)	1982	1994	Growth rate (82-94)
Urban	232	577	249%	91	343	377%	323	920	285%
Rural	285	350	123%	35	62	177%	320	412	129%
Total	517	927	179%	126	405	321%	643	1,332	207%

Source: Recensement 1994, les Caracteristiques Socio-economiques et Demographiques de la Population, Niveau National

Unemployment in urban areas increased remarkably during these 12 years. Provably this occurred because migrant workers from rural area come into urban area for job opportunities.

III4 Cultural Conditions

III4.1 Ethnic Division

Arab-Berber is the dominant ethnic group of Morocco and it accounts for 99.1% of the entire population. About 0.2% of the population is Jewish and about 0.7% is Harratin and other ethnic groups.

III4.2 Religion

Islam is the established state religion of Morocco. Almost the entire population is Sunni Muslim. About 1% of the population is Christian, and less than 0.2% is Jewish.

III4.3 Education

Table below shows school enrollment ratio in Morocco. The school enrollment ratios are rising in every level of education in recent years. However, they are still low among developing countries.

Education Level	School Enrollment Ratio			
	Total enrollment % of relevant age group		Children of official school age % of relevant age group	
	1980	1997	1980	1997
Preprimary education		98		
Primary education	83	86	62	77
Secondary education	26	39	36	38
Tertiary education	6	11		

Source: World Development Indicators 2000, World Bank

Morocco's adult illiteracy rate is high at 40% of men and 66% of women in 1998. Youth illiteracy rate has improved rapidly from 43% to 25% in men, and 72% to 45% in women during 18 years from 1980 to 1998. However, women's illiteracy rate is still very high at 66% in adults and 45% in youths.

Age Group	Illiteracy Rate (%)			
	Male		Female	
	1980	1998	1980	1998
Adult illiteracy rate (aged 15 and over)	58	40	85	66
Youth illiteracy rate (aged 15 - 24)	43	25	72	45

Source: World Development Indicators 2000, World Bank

III5 Economic Conditions

III5.1 Gross Domestic Product

Gross Domestic Product (GDP) of Morocco in 1998 was 341,385 million DH (approximately US\$ 33 billion) and GDP per capita in the same year could be estimated at 12,291 DH (approximately US\$ 1,170) as shown in Table III5.1.1.

Average annual growth rate of GDP during 10 years from 1988 to 1998 was 2.7% on 1980 constant price basis. However, the average annual growth rate of GDP per capita was 0.9% on the same basis. This shows that the economic growth has not caught up with the population growth. Yearly changes of GDP and GDP per capita are shown in Figure III5.1.1 and III5.1.2, respectively.

GDP by industrial origin is shown in Table III5.1.2. GDP of the primary industry including agricultural sector have accounted for 15 to 20% of the total GDP, while the secondary industry accounted for 31 to 33%, and the tertiary industry accounted for 37 to 40% during 10 years from 1988 to 1998.

Table III5.1.3 shows growth rate of GDP by industrial origin. GDP of the secondary and tertiary industries have been stable and growing favorably. However, GDP of the primary industry has fluctuated by a large amount according to weather conditions and it gives influence to whole GDP of Morocco. Agriculture sector still is of the utmost importance to Morocco since it is providing a living for approximately 40% of the labor force.

III5.2 Export and Import

The merchandise trade balance of Morocco runs a structural deficit, with exports covering approximately two-thirds of imports. The export had been increasing slightly faster than that of import and the trade deficit had narrowed until 1997. However, it widened again in 1998.

Merchandise Trade of Morocco (Million DH)						
Type	1994	1995	1996	1997	1998	Average annual growth rate
Export (FOB)	50,965	58,672	60,013	67,057	68,608	7.7%
Import (CIF)	76,059	85,493	84,612	90,712	98,676	6.7%
Balance	-25,094	-26,821	-24,599	-23,655	-30,068	

Source: Annuaire Statistique du Maroc 1999

Table III5.2.1 shows import and export of major commodities. The major import commodities are wheat, crude oil of petroleum, chemical products, machines and various devices. One other hand, the major export commodities are marine products, fruits and vegetables, phosphates and phosphate by-products, and textiles and leather products.

Table III5.2.2 shows import and export of major agricultural crops. Morocco regularly imports large amount of serials such as soft wheat, hard wheat, and barley. Since wheat is the staple food of Moroccan people, it is desirable to attain a greater degree of food self-sufficiency from the viewpoint of food security. On the other hand, major export crops are tomatoes, potatoes, olives, and almonds. Especially fresh tomato export is large at more than 1.2 billion DH in 1999.

III5.3 Prices

Prices in urban areas of Morocco rose remarkably in almost all the categories from 1994 to 1995. Especially the price of food rose eight % in the same period. Since 1996 the prices have generally slowed down.

The average annual increasing rate of general index was 2.7% from 1994 to 1999, while that of food is 1.9% during the same period.

Consumer Prices (Urban Area)

Category	% change year on year					Annual average 1994 - 1999
	1995	1996	1997	1998	1999	
Food	8.0	0.7	-1.1	3.1	-0.9	1.9
Clothing	3.2	3.4	3.7	3.8	3.0	3.4
Housing	6.6	7.7	1.5	2.5	3.5	4.3
Domestic equipment	2.9	3.6	2.6	1.8	1.3	2.4
Medical care	1.8	4.8	2.1	3.3	1.2	2.6
Transport and communication	5.0	4.1	4.3	2.8	1.7	3.5
Leisure and culture	4.1	6.2	4.4	1.8	1.3	3.5
Other goods and services	4.6	4.1	3.0	1.7	1.5	3.0
General	6.1	3.0	1.0	2.7	0.7	2.7

Source: Annuaire Statistique du Maroc 1999

III5.4 Foreign Currency Exchange Rate

Bank Al-Maghrib is the central bank of Morocco. They use a basket of currencies, weighted on an undisclosed trade basis, to set the value of Dirham. The government has been maintaining a relatively strong Dirham to keep down inflation. Foreign currency exchange rates against U.S. dollar and Japanese Yen are shown in Table III5.4.1 and summarized below.

Foreign Currency Exchange Rate (DH)

Currency	1995	1996	1997	1998	1999
One U.S. Dollar	8.49	8.72	9.54	9.59	9.84
100 Japanese Yen	9.11	7.98	7.85	7.36	8.76

Note: Middle rate, average of the rates at the end of each month

Source: Bank Al-Maghrib

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Tables

Table III2.2.1: Population of Provinces and Prefectures in the Study Area

Provinces and Prefectures	Population in 1971 (1,000)			Population in 1982 (1,000)			Population in 1994 (1,000)			Annual Growth Rate (1971-1982)			Annual Growth Rate (1982-1994)			Annual Growth Rate (1971-1994)		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Zone I																		
SIDI - KACEM	72	342	415	119	395	514	175	471	646									
IFRANE	31	50	81	45	56	100	61	67	128									
MEKNES EL MENZEH	288	204	492	386	241	627	191	103	294									
AL ISMAILIA	-	-	-	-	-	-	274	41	315									
EL HAJEB	-	-	-	-	-	-	65	115	180									
BOULEMANE	5	101	106	12	119	131	37	125	162									
FES JDID - DAR - DBIBAGH	372	219	591	548	257	805	243	14	256									
FES - MEDINA	-	-	-	-	-	-	267	18	285									
SEFROU	-	-	-	-	-	-	102	135	237									
ZOUAGHA - MOULAY.YACOUB	-	-	-	-	-	-	265	117	383									
AL HOCEIMA	22	224	247	59	252	311	113	270	383									
TAOUNATE	9	441	450	21	515	536	52	577	629									
TAZA	71	427	498	108	505	613	206	502	708									
CHEFCHAOUEN	16	231	248	26	283	309	43	396	439									
Total of Zone I	887	2,240	3,127	1,325	2,622	3,948	2,094	2,950	5,044	3.7%	1.4%	2.1%	3.9%	1.0%	2.1%	3.8%	1.2%	2.1%
Zone II																		
BENSLIMANE	22	119	142	34	140	174	65	149	213									
AIN-CHOCK-HAY HASSANI	129	50	179	230	68	298	438	78	516									
AIN SEBAA-HAY MOHAMMADI	280	0	280	421	0	421	521	0	521									
AL - FIDA - DERB SULTAN	-	-	-	-	-	-	387	0	387									
BEN MSICK-SIDI OTHMANE	356	25	381	593	47	640	688	16	704									
CASABLANCA - ANFA	746	9	755	914	9	924	523	0	523									
MACHOUAR CASABLANCA	-	-	-	-	-	-	4	0	4									
MOHAMMADIA	70	30	101	105	49	154	170	0	170									
SIDI BERNOUSSI ZENATA	-	-	-	-	-	-	210	59	269									
KHEMISSSET	49	300	348	115	291	406	175	311	486									
RABAT	534	83	618	893	127	1,020	623	0	623									
SALE	-	-	-	-	-	-	586	45	632									
SKHIRATE TEMARA	-	-	-	-	-	-	176	69	245									
Total of Zone II	2,187	617	2,804	3,306	731	4,037	4,566	727	5,293	3.8%	1.6%	3.4%	2.7%	0.0%	2.3%	3.3%	0.7%	2.8%
Zone III																		
KHOURIBGA	143	185	328	241	196	437	295	186	481									
SETTAT	96	480	576	144	548	692	236	612	847									
EL KELAA DES SRAGHNA	30	431	461	72	506	578	131	551	682									
ESSAOUIRA	32	311	343	47	347	394	75	358	434									
AL HAOUZ	-	-	-	-	-	-	33	402	435									
CHICHAOUA	-	-	-	-	-	-	32	280	312									
MARRAKECH-MENARA	353	640	993	483	784	1,267	333	99	433									
MARRAKECH-MEDINA	-	-	-	-	-	-	189	0	189									
SIDI YOUSSEF BEN ALI	-	-	-	-	-	-	157	82	239									
EL JADIDA	92	499	591	150	613	763	240	731	971									
SAFI	162	392	555	267	439	707	376	447	823									
AZILAL	7	320	327	32	355	387	62	393	455									
BENI-MELLAL	117	324	442	256	413	669	387	483	870									
Total of Zone III	1,033	3,583	4,615	1,692	4,201	5,893	2,547	4,624	7,171	4.6%	1.5%	2.2%	3.5%	0.8%	1.6%	4.0%	1.1%	1.9%
Zone IV																		
AGADIR-IDA-OU-TANANE	101	285	387	246	334	580	263	103	366									
CHTOUKA AIT BAHHA	-	-	-	-	-	-	26	214	240									
INEZGANE-AIT MELLOUL	-	-	-	-	-	-	262	31	293									
OUARZAZATE	26	387	413	49	485	534	142	553	695									
TAROUDANNT	26	423	448	51	508	559	134	560	694									
TIZNIT	26	251	277	41	272	313	70	278	348									
Total of Zone IV	179	1,346	1,525	386	1,599	1,985	896	1,739	2,636	7.2%	1.6%	2.4%	7.3%	0.7%	2.4%	7.2%	1.1%	2.4%
Zone V																		
FIGUIG	20	68	88	36	65	101	51	66	117									
ERRACHIDIA	31	302	333	65	356	421	155	367	522									
Total of Zone V	51	370	421	101	421	523	206	433	639	6.5%	1.2%	2.0%	6.1%	0.2%	1.7%	6.3%	0.7%	1.8%
Grand Total (Zone I to V)	4,337	8,156	12,493	6,811	9,575	16,386	10,310	10,473	20,783	4.2%	1.5%	2.5%	3.5%	0.7%	2.0%	3.8%	1.1%	2.2%

Note: The provinces and prefectures listed above are located approximately in the zones defined in this study.

Administrative boundaries and names of provinces and prefectures in 1971 and 1982 are not same as that in 1994 because of structural reforms.

Source: - Recensement 1994, Population Legale du Maroc, Direction de la Statistique

- Population Legale du Maroc, D'Après le Recensement Général de la Population et de l'Habitat de 1982

**Table III2.2.2: Population and Number of Household by
Provinces and Prefectures in the Study Area**

Provinces and Prefectures	Population in 1994 (1,000)			Household in 1994 (1,000)			Average Size of Family		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Zone I									
SIDI - KACEM	175	471	646	33	71	104	5.3	6.7	6.2
IFRANE	61	67	128	13	11	24	4.7	5.9	5.3
MEKNES EL MENZEH	191	103	294	37	17	53	5.2	6.2	5.5
AL ISMAILIA	274	41	315	54	6	60	5.1	6.8	5.3
EL HAJEB	65	115	180	12	18	30	5.3	6.4	6.0
BOULEMANE	37	125	162	7	20	27	5.1	6.4	6.0
FES JDID - DAR - DBIBAGH	243	14	256	48	2	50	5.1	6.9	5.2
FES - MEDINA	267	18	285	49	3	52	5.4	6.7	5.5
SEFROU	102	135	237	21	22	43	4.9	6.2	5.6
ZOUAGHA - MOULAY.YACOUB	265	117	383	47	16	63	5.7	7.2	6.1
AL HOCEIMA	113	270	383	20	41	61	5.5	6.7	6.3
TAOUNATE	52	577	629	10	89	98	5.4	6.5	6.4
TAZA	206	502	708	36	72	108	5.7	7.0	6.5
CHEFCHAOUEN	43	396	439	8	61	70	5.1	6.5	6.3
Total of Zone I	2,094	2,950	5,044	395	447	842	5.3	6.6	6.0
Zone II									
BENSLIMANE	65	149	213	12	23	35	5.5	6.4	6.1
AIN-CHOCK-HAY HASSANI	438	78	516	79	14	93	5.6	5.6	5.6
AIN SEBAA-HAY MOHAMMADI	521	0	521	92	0	92	5.7	-	5.7
AL - FIDA - DERB SULTAN	387	0	387	73	0	73	5.3	-	5.3
BEN M'SICK-SIDI OTHMANE	688	16	704	116	3	119	5.9	5.8	5.9
CASABLANCA - ANFA	523	0	523	110	0	110	4.8	-	4.8
MACHOUAR CASABLANCA	4	0	4	1	0	1	4.9	-	4.9
MOHAMMADIA	170	0	170	32	0	32	5.4	-	5.4
SIDI BERNOUSSI ZENATA	210	59	269	37	10	47	5.7	5.8	5.7
KHEMISSSET	175	311	486	35	50	84	5.0	6.3	5.8
RABAT	623	0	623	127	0	127	4.9	-	4.9
SALE	586	45	632	109	6	116	5.4	7.1	5.5
SKHIRATE TEMARA	176	69	245	32	11	44	5.4	6.0	5.6
Total of Zone II	4,566	727	5,293	854	118	972	5.3	6.2	5.4
Zone III									
KHOURIBGA	295	186	481	54	28	82	5.5	6.6	5.8
SETTAT	236	612	847	44	87	131	5.4	7.1	6.5
EL KELAA DES SRAGHNA	131	551	682	23	78	101	5.7	7.1	6.8
ESSAOUIRA	75	358	434	16	60	76	4.8	6.0	5.7
AL HAOUZ	33	402	435	6	61	67	5.2	6.6	6.4
CHICHAOUA	32	280	312	6	47	53	5.3	5.9	5.9
MARRAKECH-MENARA	333	99	433	62	15	77	5.4	6.4	5.6
MARRAKECH-MEDINA	189	0	189	37	0	37	5.1	-	5.1
SIDI YOUSSEF BEN ALI	157	82	239	27	13	40	5.7	6.4	5.9
EL JADIDA	240	731	971	48	113	161	5.0	6.5	6.0
SAFI	376	447	823	71	68	139	5.3	6.6	5.9
AZILAL	62	393	455	12	57	69	5.0	6.9	6.6
BENI-MELLAL	387	483	870	73	69	141	5.3	7.0	6.2
Total of Zone III	2,547	4,624	7,171	480	696	1,176	5.3	6.6	6.1
Zone IV									
AGADIR-IDA-OU-TANANE	263	103	366	54	17	71	4.9	6.1	5.2
CHTOUKA AIT BAHA	26	214	240	5	38	43	5.0	5.6	5.5
INEZGANE-AIT MELLOUL	262	31	293	52	5	57	5.1	5.8	5.1
OUARZAZATE	142	553	695	22	68	90	6.5	8.1	7.7
TAROUDANNT	134	560	694	25	85	110	5.3	6.6	6.3
TIZNIT	70	278	348	14	49	63	4.9	5.7	5.5
Total of Zone IV	896	1,739	2,636	172	262	434	5.2	6.6	6.1
Zone V									
FIGUIG	51	66	117	10	11	21	5.3	6.0	5.7
ERRACHIDIA	155	367	522	26	51	76	6.1	7.2	6.8
Total of Zone V	206	433	639	35	62	97	5.9	7.0	6.6
Grand Total (Zone I to V)	10,310	10,473	20,783	1,936	1,585	3,522	5.3	6.6	5.9

Source: - Recensement 1994, Population Legale du Maroc, Direction de la Statistique

**Table III2.2.3: Population Projection by Provinces
and Prefectures in the Study Area**

Provinces and Prefectures	Population	Population Projection (1,000)		Annual Average Growth Rate		
	Census in 1994	2000	2010	1994-2000	2000-2010	1994-2010
Zone I						
SIDI - KACEM	646	700	779	1.4%	1.1%	1.2%
IFRANE	128	139	159	1.4%	1.4%	1.4%
MEKNES EL MENZEH	294	316	349	1.2%	1.0%	1.1%
AL ISMAILIA	315	340	375	1.3%	1.0%	1.1%
EL HAJEB	180	200	230	1.7%	1.4%	1.5%
BOULEMANE	162	173	193	1.1%	1.1%	1.1%
FES JDID - DAR - DBIBAGH	256	332	486	4.4%	3.9%	4.1%
FES - MEDINA	285	301	323	0.9%	0.7%	0.8%
SEFROU	237	251	269	1.0%	0.7%	0.8%
ZOUAGHA - MOULAY.YACOUB	383	460	618	3.1%	3.0%	3.0%
AL HOCEIMA	383	411	452	1.2%	1.0%	1.0%
TAOUNATE	629	659	692	0.8%	0.5%	0.6%
TAZA	708	745	792	0.9%	0.6%	0.7%
CHEFCHAOUEN	439	505	623	2.4%	2.1%	2.2%
Total of Zone I	5,044	5,532	6,340	1.6%	1.4%	1.4%
Zone II						
BENSLIMANE	213	230	251	1.3%	0.9%	1.0%
AIN-CHOCK-HAY HASSANI	516	629	890	3.3%	3.5%	3.5%
AIN SEBAA-HAY MOHAMMADI	521	582	686	1.9%	1.7%	1.7%
AL - FIDA - DERB SULTAN	387	378	358	-0.4%	-0.5%	-0.5%
BEN M'SICK-SIDI OTHMANE	704	796	908	2.1%	1.3%	1.6%
CASABLANCA - ANFA	523	528	531	0.1%	0.1%	0.1%
MACHOUAR CASABLANCA	4	5	5	4.0%	0.0%	1.5%
MOHAMMADIA	170	205	272	3.2%	2.9%	3.0%
SIDI BERNOUSSI ZENATA	269	299	390	1.8%	2.7%	2.4%
KHEMISSSET	486	520	574	1.1%	1.0%	1.1%
RABAT	623	658	699	0.9%	0.6%	0.7%
SALE	632	788	1,118	3.8%	3.6%	3.6%
SKHIRATE TEMARA	245	314	466	4.2%	4.0%	4.1%
Total of Zone II	5,293	5,932	7,148	1.9%	1.9%	1.9%
Zone III						
KHOURIBGA	481	491	497	0.3%	0.1%	0.2%
SETTAT	847	916	989	1.3%	0.8%	1.0%
EL KELAA DES SRAGHNA	682	732	796	1.2%	0.8%	1.0%
ESSAOUIRA	434	441	449	0.3%	0.2%	0.2%
AL HAOUZ	435	460	492	0.9%	0.7%	0.8%
CHICHAOUA	312	324	338	0.6%	0.4%	0.5%
MARRAKECH-MENARA	433	519	687	3.1%	2.8%	2.9%
MARRAKECH-MEDINA	189	184	179	-0.5%	-0.3%	-0.4%
SIDI YOUSSEF BEN ALI	239	291	388	3.3%	2.9%	3.1%
EL JADIDA	971	1,057	1,204	1.4%	1.3%	1.4%
SAFI	823	877	945	1.1%	0.7%	0.9%
AZILAL	455	482	518	1.0%	0.7%	0.8%
BENI-MELLAL	870	953	1,079	1.5%	1.2%	1.4%
Total of Zone III	7,171	7,727	8,561	1.3%	1.0%	1.1%
Zone IV						
AGADIR-IDA-OU-TANANE	366	447	611	3.4%	3.2%	3.3%
CHTOUKA AIT BAHA	240	252	265	0.8%	0.5%	0.6%
INEZGANE-AIT MELLOUL	293	391	638	4.9%	5.0%	5.0%
OUARZAZATE	695	490	566	-5.7%	1.5%	-1.3%
TAROUDANNT	694	748	822	1.3%	0.9%	1.1%
TIZNIT	348	355	365	0.3%	0.3%	0.3%
Total of Zone IV	2,636	2,683	3,267	0.3%	2.0%	1.4%
Zone V						
FIGUIG	117	122	132	0.7%	0.8%	0.8%
ERRACHIDIA	522	562	618	1.2%	1.0%	1.1%
Total of Zone V	639	684	750	1.1%	0.9%	1.0%
Grand Total (Zone I to V)	20,783	22,558	26,066	1.4%	1.5%	1.4%

Source: Projections au 1er juillet de l'annee (evolution de 2000 a 2010), Direction de la Statistique

Table III5.1.1: Gross Domestic Product of Morocco

Year	At Current Market Price				At 1980 Constant Price			
	GDP		GDP Per Capita		GDP		GDP Per Capita	
	Amount	Growth	Amount	Growth	Amount	Growth	Amount	Growth
	(Million DH)	Rate	(DH)	Rate	(Million DH)	Rate	(DH)	Rate
1988	181,583		7,818		101,496		4,370	
1989	193,931	6.8%	8,182	4.7%	104,031	2.5%	4,389	0.4%
1990	213,803	10.2%	8,843	8.1%	107,642	3.5%	4,452	1.4%
1991	242,360	13.4%	9,832	11.2%	115,579	7.4%	4,689	5.3%
1992	242,912	0.2%	9,671	-1.6%	110,920	-4.0%	4,416	-5.8%
1993	249,223	2.6%	9,742	0.7%	109,797	-1.0%	4,292	-2.8%
1994	279,323	12.1%	1,0713	10.0%	121,170	10.4%	4,647	8.3%
1995	281,702	0.9%	1,0676	-0.3%	113,197	-6.6%	4,290	-7.7%
1996	319,340	13.4%	1,1894	11.4%	127,027	12.2%	4,731	10.3%
1997	318,346	-0.3%	1,1657	-2.0%	124,168	-2.3%	4,547	-3.9%
1998	341,385	7.2%	1,2291	5.4%	132,276	6.5%	4,762	4.7%
Average Annual Growth Rate								
1988 - 1998 (last 10 years)	6.5%		4.6%		2.7%		0.9%	
1994 - 1998 (last 4 years)	5.1%		3.5%		2.2%		0.6%	

Source: Annuaire Statistique du Maroc 1993, 1996, and 1999

Table III5.1.2 Gross Domestic Product of Morocco by Industrial Origin (Million DH, Current Price)

	1988		1989		1990		1991		1992		1993		1994		1995		1996		1997		1998	
	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.	Amount	Distr.
Primary Industry	31,347	17%	33,370	17%	37,675	18%	48,703	20%	37,369	15%	36,602	15%	51,759	19%	41,161	15%	61,634	19%	49,140	15%	56,690	17%
Agriculture, forestry, and fishery	31,347	17%	33,370	17%	37,675	18%	48,703	20%	37,369	15%	36,602	15%	51,759	19%	41,161	15%	61,634	19%	49,140	15%	56,690	17%
Secondary Industry	60,492	33%	64,335	33%	70,050	33%	74,818	31%	78,523	32%	80,475	32%	86,103	31%	92,931	33%	99,120	31%	104,975	33%	109,266	32%
Mining	5,243	3%	5,172	3%	5,343	2%	5,313	2%	5,073	2%	4,958	2%	5,151	2%	5,060	2%	5,603	2%	7,132	2%	7,217	2%
Energy	14,220	8%	14,067	7%	13,069	6%	15,706	6%	17,359	7%	18,665	7%	21,305	8%	23,722	8%	25,568	8%	26,867	8%	28,106	8%
Manufacturing	31,891	18%	34,554	18%	40,284	19%	41,739	17%	44,050	18%	44,851	18%	47,586	17%	51,715	18%	54,500	17%	56,212	18%	58,497	17%
Building and public works	9,139	5%	10,542	5%	11,354	5%	12,060	5%	12,040	5%	12,000	5%	12,062	4%	12,434	4%	13,449	4%	14,764	5%	15,447	5%
Tertiary Industry	69,838	38%	73,417	38%	80,736	38%	89,582	37%	96,041	40%	99,639	40%	107,327	38%	110,531	39%	117,848	37%	120,840	38%	128,195	38%
Commerce and import taxes	35,913	20%	37,769	19%	43,530	20%	49,354	20%	51,168	21%	51,313	21%	55,274	20%	55,780	20%	61,496	19%	62,072	20%	66,103	19%
Transport and communication	12,030	7%	12,735	7%	13,205	6%	13,907	6%	15,408	6%	16,465	7%	16,631	6%	17,508	6%	17,980	6%	18,555	6%	20,102	6%
Other services	21,895	12%	22,912	12%	24,002	11%	26,321	11%	29,465	12%	31,861	13%	35,421	13%	37,243	13%	38,372	12%	40,212	13%	41,991	12%
Sub-total	161,677	89%	171,122	88%	188,462	88%	213,102	88%	211,933	87%	216,716	87%	245,189	88%	244,623	87%	278,602	87%	274,955	86%	294,152	86%
Public Administration	19,906	11%	22,809	12%	25,341	12%	29,258	12%	30,979	13%	32,507	13%	34,134	12%	37,079	13%	40,738	13%	43,391	14%	47,234	14%
Total	181,583		193,931		213,803		242,360		242,912		249,223		279,323		281,702		319,340		318,346		341,386	

Source: Annuaire Statistique du Maroc 1993, 1996, and 1999

Table III5.1.3 Growth Rate of GDP by Industrial Origin (Million DH, 1980 Constant Price)

	GDP by Industrial Origin (Million DH on 1980 Constant Price Basis)											Average Annual Growth Rate										
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	'88-'89	'89-'90	'90-'91	'91-'92	'92-'93	'93-'94	'94-'95	'95-'96	'96-'97	'97-'98	10 years '88-'98
Primary Industry	19,885	20,798	19,760	24,048	15,163	14,457	23,333	13,078	23,280	17,120	21,166	4.6%	-5.0%	21.7%	-36.9%	-4.7%	61.4%	-43.9%	78.0%	-26.5%	23.6%	0.6%
Agriculture, forestry, and fishery	19,885	20,798	19,760	24,048	15,163	14,457	23,333	13,078	23,280	17,120	21,166	4.6%	-5.0%	21.7%	-36.9%	-4.7%	61.4%	-43.9%	78.0%	-26.5%	23.6%	0.6%
Secondary Industry	29,252	28,853	31,502	31,599	32,347	32,018	33,298	34,787	36,463	38,535	39,240	-1.4%	9.2%	0.3%	2.4%	-1.0%	4.0%	4.5%	4.8%	5.7%	1.8%	3.0%
Mining	3,983	3,195	3,518	3,115	3,262	3,156	3,426	3,467	3,544	4,088	3,942	-19.8%	10.1%	-11.5%	4.7%	-3.3%	8.5%	1.2%	2.2%	15.3%	-3.6%	-0.1%
Energy	3,360	3,528	3,754	3,928	4,183	4,125	4,448	5,157	5,849	6,276	6,361	5.0%	6.4%	4.6%	6.5%	-1.4%	7.8%	16.0%	13.4%	7.3%	1.3%	6.6%
Manufacturing	17,137	17,031	19,061	19,573	20,099	19,911	20,665	21,429	22,058	22,806	23,360	-0.6%	11.9%	2.7%	2.7%	-0.9%	3.8%	3.7%	2.9%	3.4%	2.4%	3.1%
Building and public works	4,772	5,099	5,169	4,983	4,804	4,827	4,760	4,734	5,012	5,365	5,577	6.9%	1.4%	-3.6%	-3.6%	0.5%	-1.4%	-0.5%	5.9%	7.0%	4.0%	1.6%
Tertiary Industry	36,929	38,077	39,807	42,113	45,068	44,076	45,357	45,059	45,992	46,744	49,406	3.1%	4.5%	5.8%	7.0%	-2.2%	2.9%	-0.7%	2.1%	1.6%	5.7%	3.0%
Commerce and import taxes	19,477	20,476	21,936	23,531	24,974	23,549	23,821	23,429	24,468	24,582	26,463	5.1%	7.1%	7.3%	6.1%	-5.7%	1.2%	-1.6%	4.4%	0.5%	7.6%	3.1%
Transport and communication	5,308	5,381	5,697	5,930	6,864	7,083	7,436	7,568	7,777	7,961	8,497	1.4%	5.9%	4.1%	15.8%	3.2%	5.0%	1.8%	2.8%	2.4%	6.7%	4.8%
Other services	12,145	12,220	12,174	12,653	13,230	13,445	14,100	14,062	13,747	14,200	14,446	0.6%	-0.4%	3.9%	4.6%	1.6%	4.9%	-0.3%	-2.2%	3.3%	1.7%	1.8%
Sub-total	86,065	87,728	91,070	97,760	92,578	90,551	101,988	92,924	105,735	102,399	109,811	1.9%	3.8%	7.3%	-5.3%	-2.2%	12.6%	-8.9%	13.8%	-3.2%	7.2%	2.5%
Public Administration	15,521	16,303	16,572	17,819	18,342	19,246	19,182	20,273	21,292	21,769	22,465	5.0%	1.7%	7.5%	2.9%	4.9%	-0.3%	5.7%	5.0%	2.2%	3.2%	3.8%
Total	101,586	104,031	107,642	115,579	110,920	109,797	121,170	113,197	127,027	124,168	132,276	2.4%	3.5%	7.4%	-4.0%	-1.0%	10.4%	-6.6%	12.2%	-2.3%	6.5%	2.7%

Source: Annuaire Statistique du Maroc 1993, 1996, and 1999

Table III5.2.1: Import and Export of Major Commodities

Major Commodities	Amount (Million DH, current price)										
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
IMPORT											
Food, beverage, tobacco	4,175	4,992	4,801	5,146	7,619	9,036	7,348	11,630	11,223	10,149	11,393
Dairy products	350	564	623	611	842	680	759	814	730	538	644
Wheat	1,415	1,818	1,410	1,314	2,736	3,267	1,491	3,997	4,137	3,486	3,728
Sugar	558	673	666	593	808	864	1,164	1,320	1,349	1,521	1,490
Others	1,852	1,937	2,102	2,628	3,233	4,225	3,934	5,499	5,007	4,604	5,531
Energy and lubricant	5,156	7,157	9,652	8,631	9,598	8,895	10,239	10,053	11,199	12,347	8,842
Crude oil of petroleum	4,380	6,094	8,142	6,580	8,007	6,693	6,902	6,721	7,397	8,389	5,412
Petroleum gas and other hydrocarbon	234	289	546	784	504	748	1,003	1,320	1,424	1,685	1,300
Others	542	774	964	1,267	1,087	1,454	2,334	2,012	2,378	2,273	2,130
Raw materials	6,407	5,332	6,886	7,034	6,939	6,106	7,497	9,067	7,745	8,192	7,691
Raw vegetable oil	631	827	637	755	973	1,054	1,241	1,364	1,428	1,280	1,489
Wood and timber	1,145	1,234	1,506	1,343	1,666	1,400	1,734	1,964	1,544	1,784	1,646
Raw sulfur	2,748	1,047	2,374	2,191	1,829	1,071	1,126	1,585	1,234	1,440	1,081
Others	1,883	2,224	2,369	2,745	2,471	2,581	3,396	4,154	3,539	3,688	3,475
Half-finished goods	10,323	12,131	13,753	15,219	14,777	14,078	16,679	17,882	16,840	17,821	19,402
Chemical products	1,758	1,955	2,413	2,529	2,393	2,718	2,937	3,237	3,202	3,283	3,415
Natural and chemical manure	474	431	394	557	439	454	632	553	959	634	818
Artificial plastic materials	1,054	1,132	1,418	1,433	1,459	1,484	1,961	2,297	2,132	2,315	2,424
Paper and cardboard	677	760	854	1,016	1,115	1,078	1,092	1,430	1,284	1,367	1,474
Dishes, sheet metal, iron hoop	880	1,074	1,212	1,016	1,100	828	827	1,248	861	939	1,151
Steel wire, bar, and palplanches	398	503	579	907	1,048	881	760	778	653	654	827
Others	5,082	6,276	6,883	7,761	7,223	6,635	8,470	8,339	7,749	8,629	9,293
Finished goods of equipment	8,752	11,960	15,301	16,236	16,781	17,047	16,990	16,257	15,375	15,815	21,581
Agricultural machine and equipment	409	462	554	752	415	365	832	515	956	648	875
Piston engine and other engine	357	292	428	486	523	409	407	490	525	517	601
Pumps and compressors	323	354	437	442	462	395	370	470	529	524	643
Furnace	12	26	271	49	622	2,436	178	29	50	41	1,504
Machines and various devices	1,506	1,757	2,314	2,461	2,712	2,645	2,747	3,541	3,193	3,531	3,933
Industrial vehicles	759	942	1,100	1,220	1,311	922	1,207	1,325	1,169	1,685	1,784
Others	5,386	8,127	10,197	10,826	10,736	9,875	11,249	9,887	8,953	8,869	12,241
Finished goods of consumption	4,319	5,018	6,630	7,446	7,091	6,743	7,275	7,980	9,581	10,689	12,010
Medicine	388	452	598	645	750	801	927	974	1,007	1,183	1,281
Textile	746	1,006	1,439	1,615	1,396	1,327	1,380	1,545	1,574	1,631	1,721
Television and radio receiver	280	287	247	205	164	271	217	347	612	791	1,002
Vehicles for tourism	464	624	933	1,118	811	677	736	659	1,559	1,656	1,446
Others	2,441	2,649	3,413	3,863	3,970	3,667	4,015	4,455	4,829	5,428	6,560
Industrial gold	0	4	0	18	0	0	0	0	0	6	17
Total Import	39,132	46,594	57,023	59,730	62,805	61,905	66,028	72,869	71,963	75,019	80,936
EXPORT											
Food, beverage, tobacco	7,528	7,261	8,636	10,412	8,966	9,051	10,352	12,393	13,079	13,090	13,702
Crustacean, mollusk, shellfishes	1,612	1,563	1,757	2,729	2,501	2,924	3,521	4,310	4,110	3,843	3,940
Fresh Tomato	391	286	390	468	515	492	404	612	719	865	1,020
Citrus fruits	1,610	1,168	1,397	1,819	1,461	1,443	1,384	1,716	2,700	2,377	2,725
Canned fishes	904	1,002	1,169	1,347	1,360	1,354	1,440	1,542	1,535	1,664	1,829
Canned beans	564	709	879	901	749	661	845	1,098	1,167	1,223	929
Others	2,447	2,533	3,044	3,148	2,380	2,177	2,758	3,115	2,848	3,118	3,259
Energy and lubricant	613	733	1,250	936	1,068	914	770	886	673	866	997
Raw materials	6,266	6,575	6,151	5,248	4,813	4,464	5,434	5,645	6,123	7,739	7,238
Of animal and vegetable origin	1,130	1,323	1,485	1,134	1,120	974	1,429	1,631	1,572	1,859	1,312
Phosphate	4,154	4,148	3,600	3,016	2,621	2,416	2,515	2,426	3,030	4,141	4,398
Others	982	1,104	1,066	1,098	1,072	1,074	1,490	1,588	1,521	1,739	1,528
Half-finished goods	8,642	5,941	8,768	9,458	8,152	8,369	9,105	10,472	10,630	11,587	10,762
Natural and chemical manure	2,637	2,653	3,387	3,316	2,446	2,895	2,489	3,076	3,321	3,353	3,309
Phosphoric acid	4,672	1,454	2,868	3,716	3,425	3,256	3,937	4,699	4,598	5,534	4,878
Others	1,333	1,834	2,513	2,426	2,281	2,218	2,679	2,697	2,711	2,700	2,575
Finished goods of equipment	359	986	1,258	1,525	1,482	1,704	1,296	1,312	1,334	1,421	1,937
Industrial	359	983	1,252	1,506	1,476	1,700	1,292	1,309	1,331	1,412	1,929
Others	0	3	6	19	6	4	4	3	3	9	8
Finished goods of consumption	6,343	6,775	8,795	9,704	9,478	9,864	9,595	9,532	9,517	9,849	9,864
Knitwear	1,190	1,387	1,915	2,165	2,406	2,732	2,708	2,856	3,046	3,237	3,263
Clothes	2,443	2,557	3,637	4,187	4,137	4,012	3,804	3,640	3,412	3,323	3,298
Others	2,710	2,831	3,243	3,352	2,935	3,120	3,083	3,036	3,059	3,289	3,303
Industrial gold	0	0	0	0	0	0	0	0	0	0	7
Total Export	29,751	28,271	34,858	37,283	33,959	34,366	36,552	40,240	41,356	44,552	44,507

Source: Annuaire Statistique du Maroc 1993, 1996, and 1999, Direction de la Statistique

Table III.2.2: Import and Export of Major Crops
(Current Price)

	1995		1996		1997		1998		1999	
	Volume (ton)	Value (1,000DH)	Volume (ton)	Value (1,000DH)	Volume (ton)	Value (1,000DH)	Volume (ton)	Value (1,000DH)	Volume (ton)	Value (1,000DH)
IMPORT (CIF, Morocco)										
Hard wheat (except seeds)	260,931	551,423	322,524	675,448	450,865	1,010,574	454,914	984,182	496,411	940,502
Soft wheat (except seeds)	2,288,181	3,445,638	1,917,399	3,460,275	1,603,797	2,474,056	2,126,103	2,743,988	2,306,542	2,857,349
Barley (except seeds)	465,029	536,110	29,478	47,437	83,819	118,046	725,391	580,585	755,235	717,360
Potato (seeds)	54,387	311,287	20,066	110,748	38,260	112,126	39,177	137,070	35,316	151,356
Broad bean (grain except seed)	25,104	53,973	3,873	9,343	2,736	5,821	1,908	3,103	11,667	19,734
Almond (dried, soft, without hull)	7	77	27	1,396	6	449	7	293	46	1,171
Dates	574	8,958	764	15,570	1,049	20,931	1,319	25,408	2,067	24,540
EXPORT (FOB, Morocco)										
Tomato (Nov. 1 - May 14)	144,202	565,260	144,077	673,973	165,571	758,890	234,376	1,148,153	242,112	1,205,319
Tomato (May 15 - Oct. 10)	12,019	47,064	8,969	44,630	23,082	106,514	4,230	18,233	1,461	6,433
Potato (Jan. 1 - May 15)	89,633	395,070	50,464	214,450	46,529	168,271	26,262	111,644	86,768	288,490
Potato (May 16 - Jun. 30)	5,732	15,146	1,739	7,238	3,084	9,789	3,126	11,478	2,664	12,230
Melon	7,326	53,167	10,745	66,045	11,146	66,796	576	2,090	3	32
Water melon	49	287	33	222	107	170	45	496	0	0
Grape (Nov. 1 - Jul. 14)	0	0	0	0	174	2,020	603	12,197	364	3,570
Grape (Jul.15 - Oct.31)	0	0	55	689	38	266	130	769	741	7,867
Olive (preserved, not for food)	280	2,116	193	1,444	1,739	16,002	925	9,315	2,718	24,889
Broad bean (seed)	203	2,838	450	5,072	554	6,239	678	7,057	373	3,793
Broad bean total	203	2,838	450	5,072	554	6,239	678	7,057	373	3,793
Almond (dried, bitter, without hull)	1,198	46,895	749	39,719	918	40,186	1,684	51,169	1,398	33,093
Dates	42	591	46	321	11	157	5	54	0	0

Source: Office des Changes, Morocco

Table III5.4.1: Foreign Currency Exchange Rate
(Middle Rate, at the end of each month)

(Unit: Dirham)

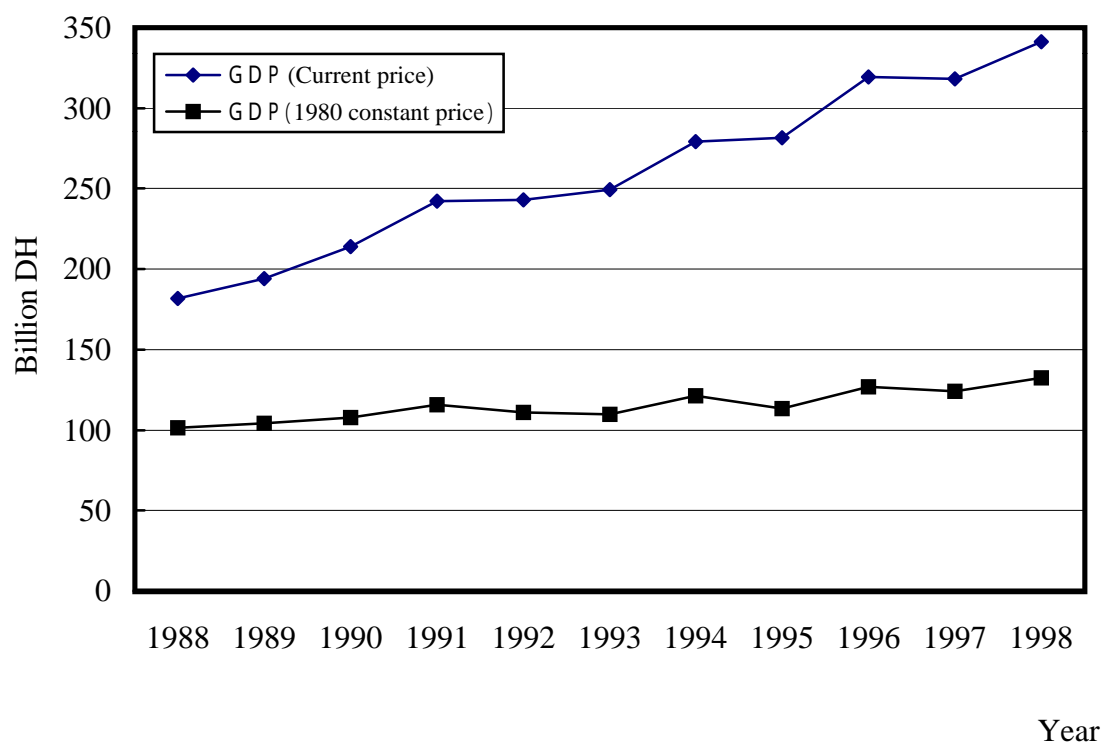
Month	1995		1996		1997		1998		1999		2000	
	US\$ 1	JPY 100	US\$ 1	JPY 100	US\$ 1	JPY 100	US\$ 1	JPY 100	US\$ 1	JPY 100	US\$ 1	JPY 100
January	8.80	8.93	8.74	8.16	9.18	7.56	9.80	7.82	9.46	8.15	10.25	9.60
February	8.71	9.00	8.61	8.22	9.39	7.78	9.80	7.77	9.67	8.10	10.35	9.44
March	8.39	9.63	8.64	8.11	9.32	7.55	9.90	7.44	9.77	8.24	10.35	10.11
April	8.40	10.00	8.83	8.29	9.54	7.52	9.71	7.36	9.86	8.27	10.68	9.90
May	8.39	10.11	8.83	8.15	9.43	8.12	9.72	7.01	9.95	8.17		
June	8.36	9.86	8.78	7.99	9.55	8.35	9.78	7.03	10.04	8.31		
July	8.28	9.42	8.58	8.04	9.90	8.36	9.69	6.72	9.79	8.51		
August	8.63	8.89	8.65	7.95	9.77	8.19	9.62	6.80	9.83	8.99		
September	8.45	8.59	8.78	7.87	9.66	7.99	9.26	6.80	9.75	9.23		
October	8.44	8.27	8.68	7.64	9.47	7.87	9.21	7.93	9.83	9.43		
November	8.55	8.43	8.76	7.70	9.59	7.52	9.37	7.63	10.08	9.88		
December	8.47	8.21	8.80	7.56	9.71	7.46	9.26	8.03	10.09	9.88		
Average	8.49	9.11	8.72	7.98	9.54	7.85	9.59	7.36	9.84	8.76	10.41	9.76

Note: US\$ means United States Dollar, JPY means Japanese Yen

Source : Bank Al-Maghrib

*Feasibility Study on Water Resources Development in
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the Kingdom of Morocco
Final Report
Volume III Supporting Report (1)
Basic Study
Supporting Report III
Socio-economy*

Figures

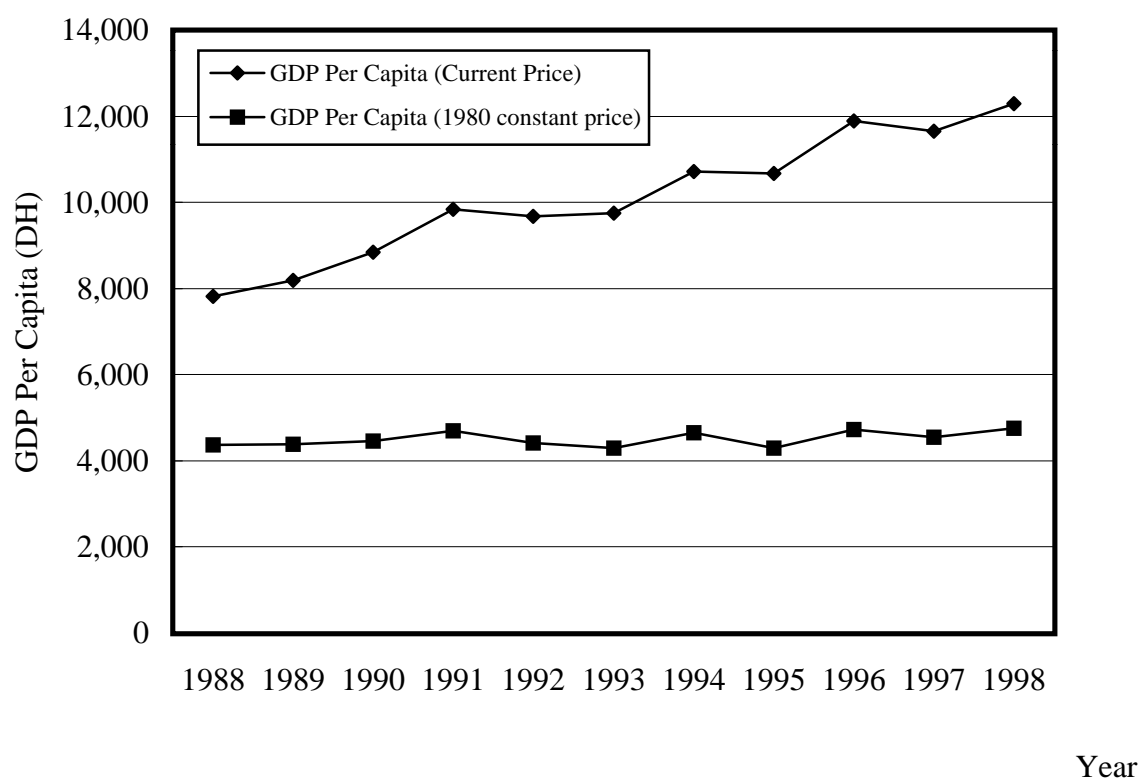


FEASIBILITY STUDY ON
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Figure III5.1.1

**Gross Domestic Product (GDP) of
Morocco**



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Figure III5.1.2
GDP per Capita