



Strategic Choices of Moroccan Agri-food SME Exporters

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Research Article

Abstract

Purpose This study aims to ascertain whether or not there is an ultimate strategy for improving the export performance of Moroccan SMEs operating in the agri-food sector.

Methods Performance is apprehended in this research by two variables (export performance and the evolution of export turnover). At the same time, strategic choices are split into six orientations: differentiation, cost leadership, focus, marketing diversification, innovation, and alliance. Data are collected from a sample of 25 SMEs. Chi-square (Chi) and FCA (Factorial correspondence analysis) determine the relationship between two variables in a population by plotting statistical maps of the contingency table.

Results Based on the survey, the commercial performance of Moroccan SME exporters operating in the agri-food sector remains unaffected by the selection and implementation of a particular strategy.

Implications The result implies that no single strategy can be deemed superior to another. Instead, hybrid strategies are adopted and integrated based on individual companies' unique requirements, objectives, and limitations.

Keywords: Strategic choice, Performance, SME exporters, Agri-food sector, Comparative study, Morocco.

1. Introduction

While extensive literature discusses the significance of internationalization and the necessity of well-defined strategies to ensure survival and goal attainment, there are a limited number of domestic publications offering insights into the strategies that Moroccan SMEs should adopt despite the continual evolution of these concepts.

The selection of SMEs as the analytical framework is warranted by the substantial impact these entities have on various countries' economic, industrial, and social structures, with a particular emphasis on Morocco. Certainly, Moroccan small and medium-sized enterprises (SMEs) make up 93% of the total businesses in the country and employ more than 46% of the workforce. Nevertheless, they contribute only 40% to the country's Gross Domestic Product (GDP) and represent 31% of its export activities (Ministry of Economy and Finance, 2023).

Hence, in the current business landscape, SMEs aspiring to venture into international markets need to adapt their management and organization to new international business conditions while planning and

implementing judicious, coherent strategies that are compatible with the company's resources and skills, to ensure its long-term survival, better counter the competition and become more competitive.

Indeed, the strategic options available to companies have been the subject of several studies backed up by examples of companies that have succeeded where others have failed. Moreover, the international arena calls for different strategies from those implemented by companies in their local markets (Boyer, 1994). However, companies face a myriad of strategic options, including costs, quality, innovation, partnerships, and diversification. The challenge lies in determining the most effective choice for international success (Leroy, 2008; Parthasarthy et al., 2009; Porter, 1980; Soparnot, 2010). Given this complexity, our current research focuses on the following research question:

Are some strategies more suitable than others for Moroccan SMEs to improve their export performance?

The nature of our research question implies the choice of a particular sector of activity to identify, determine, and compare the strategies adopted by Moroccan SME exporters in their quest for better performance. Therefore, we chose the agri-food sector, one of Morocco's flagship global businesses, characterized by its weight and strategic importance for the national economy.

2. Literature review

In the upcoming segments, we will analyze the agri-food sector in terms of its importance and influence on the Moroccan economy. Following this, we will conduct a comparative analysis, examining Morocco alongside its primary competitors in this sector, namely Spain and Turkey. The objective of this comparison is to identify and scrutinize the essential strategies implemented by companies in these nations to achieve success on the international stage. Finally, we will discuss the strategic choices made by the companies in order to ensure their long-term survival.

2.1. Overview of the Moroccan agri-food sector

The Agri-food sector, one of Morocco's classic sectors and one of its global businesses, is ranked as the country's second-largest industrial sector and benefiting from strong domestic and international demand. However, despite the sector's experience and potential, its performance remains weak in a delicate and highly competitive global environment.

"According to the Ministry of Industry and Trade, the agri-food sector generates sales of almost 158 billion DHs (\approx 17.08 billion US dollars), or 26% of industrial GDP, with exports reaching 36.4 billion DHs (\approx 3.95 billion US dollars) in 2021. The sector has been on a growth and performance dynamic for several years, thanks to the ambitious strategy established by the public authorities and the sector's operators. The agri-food sector has thus recorded significant growth under the program contract (2017-2021)" (Finances News Hebdo, 2022, p1).

As outlined in the September 2022 report by the Moroccan Institute of Strategic Intelligence (IMIS) (Azirar et al., 2022), the sector encompasses approximately 2,000 enterprises. It sustains a workforce exceeding 150,000 individuals, constituting 25% of the industrial labor force.

The sector's main branches are Fruits, vegetables, Fish, and preserves; Meat and poultry; Beverage oils; Dairy products; Flour cereals; Cookies, confectionery, chocolate, sugar, pasta, and couscous; Tobacco products. These branches differ in terms of size and market. Indeed, the number and size of companies vary from one branch to another, and not all of these branches' products are export-oriented. Some are (fruit, vegetables, and fish), while others are intended exclusively for domestic consumption (dairy industry, meats, beverages, etc.).

The following figure shows that Moroccan agri-food exports rose by 28% in 2022 compared to 2021 according to the Ministry of Industry and Trade (Benabdellah, 2022).



Fig. 1. Agri-food Industry Export Trends

Unsurprisingly, the European Union remains the favorite destination for Moroccan agri-food exports. However, Asian, and African markets offer new niches for Morocco in most sectors, particularly agro-food. However, despite efforts to make the Moroccan agri-food sector more competitive internationally, according to the report by the Research and Financial Forecasting Department (2010) on the performance and prospects of the agri-food industry sector in Morocco, it remains marked by a negative trade balance, essentially due to challenges such as under-qualified human capital, precarious work, weak innovation and quality, deficiencies in company management organization, obstacles in agricultural raw material supply to factories, limited solvent demand, low investment rates coupled with technological lag, financing issues, elevated transport, packaging, and energy costs, as well as the low added value of exported products, all exacerbated by intense competition from Mediterranean countries.

The public authorities, aware of the importance of the agri-food sector in ensuring the country's food security and export competitiveness, have implemented numerous programs and reforms, notably the Green Morocco Plan, the Halieutis Plan, and other measures under the National Pact for Industrial Emergence.

The government's plan for the agri-food sector currently revolves around the "Green Generation 2020-2030" strategy, introduced in February 2020. It focuses on two key aspects: prioritizing human development by fostering a new agricultural middle class and supporting young entrepreneurs, mobilizing one million hectares of collective land, and implementing innovative support mechanisms; and ensuring sustainable agricultural growth by doubling exports and the agricultural GDP by 2030, modernizing wholesale markets for improved product distribution, and laying the groundwork for enhanced resilience and sustainability. Implementation requires an annual sector budget increase of around 2.5% from 2020 (World Bank, 2020). Whether in the agri-food or other sectors, Morocco's main competitors are in the Mediterranean basin. Indeed, Spain and Turkey compete directly with Morocco in the agri-food sector.

For instance, tomatoes serve as the primary export commodity for Morocco. In 2022, the nation secured the third position in the worldwide ranking of tomato exporters, outpacing Spain (4th) and Turkey (5th). Morocco's tomato exports constituted 10.54% of the global aggregate, reaching a volume of 740.66 million kilograms. Spain contributed 8.69% to the total, amounting to 610.4 million kilograms, while Turkey followed with 520.18 million kilograms (Hortoinfo, 2023).

2.2. Comparative Analysis of the Moroccan agri-food sector: Spain and Turkey

According to the World Economic Forum's Economic Power Ranking 2021, Spain, the world's fifteenth-largest economy, has an 11.6% share of the European agri-food market, placing it fifth in Europe in the agri-food industry (Fellah-trade, 2017).

Indeed, with sales of over 139 billion euros (\approx 152.55 billion US dollars, 2.7% of GDP) and employing around 450,000 people, the Spanish agri-food industry is the country's leading manufacturing activity. The dynamism of Spanish agri-food exports, which have posted a surplus for twelve consecutive years and account for almost 20% of the country's total exports, has made the industry Europe's fourth-largest

exporter and the world's seventh-largest. More than 30,000 companies in the sector currently export food and beverages from Spain, with internationalization one of the main pillars of its strong position and growth (González, 2023).

2020 Spanish agri-food exports reached 18.4 billion euros (\approx 20.21 billion US dollars), up 3.7% from 2019. Spain's main trading partners are the European Union, the United States, and the United Kingdom (fellow-trade, 2023). These performances by Spanish agri-food companies are essentially due to a capacity to restructure and a high volume of exports, diversity of activities and destinations to minimize risks, technological innovations (both products and processes) to cope with the pressure of internal and external competition, and continuous training of workers (Franco-Spanish Chamber of Commerce and Industries, 2013).

On the other hand, Turkey, the world's nineteenth-largest economy and seventh-largest in Asia (2022), has become "*one of the largest economies and export-oriented manufacturing industries in the region*" (Çağlar, 2013, 139). Agricultural production in Turkey has increased considerably in recent years. According to World Bank data, agri-food exports soared to around 20.7 billion US dollars in 2020, representing around 10% of national exports. The sector accounts for 6.6% of the Turkish economy and employs around 18% of the workforce (World Bank, 2023). Indeed, according to the 2022 Foreign Agricultural Service, Turkey's agricultural economy is one of the top ten in the world, with half the country made up of farmland and almost a quarter of the population employed in agriculture.

Apart from government initiatives, the flow of foreign direct investment, and favorable climatic and ecological conditions, Turkish SMEs are among the reasons for their success. They explain the significant evolution of the economy, thanks in particular to their great capacity for adaptation and flexibility, as well as the adoption of various strategies to grow and succeed in the different sectors of the agri-food industry, including product differentiation, alliances (Koç, 2012), innovation and marketing diversification (Cheriet & Tozanli, 2010).

2.3. Strategic choices

Once the company has defined its objectives and conducted an external and internal diagnosis to assess its strengths, weaknesses, opportunities, and threats, the next step is choosing a relevant strategic option. In this section, we will analyze the main strategic choices (drawn from theory and the experiences of SMEs in competitor countries) available to companies, particularly SMEs, wishing to expand their activities internationally and succeed in this field.

2.3.1. Porter's generic strategies

According to Michael Porter (1980), formulating a strategy requires a thorough understanding and analysis of the company's sectors and rivals. He explains that a company's success is the direct consequence of how it confronts the competition, basing its strategy on the search for either cost advantage or differentiation.

This logic enabled Porter (1986) to highlight three so-called generic strategies. The first one, Cost domination, can be successful if it enables companies to charge lower prices than their main competitors, bear lower costs, and thus generate higher margins (Soparnot, 2010). The second one, Differentiation, "*is based on the ability to develop a specific and different offer valued by the customer, thereby gaining a competitive advantage by selling the product at a higher price and benefiting from higher margins*" (Lendrevie & Lévy, 2014, 676). The last one, Focusing or The strategy of niche concentration, generally adopted by SMEs, consists of concentrating efforts on a narrow segment of the market, i.e. a particular geographical segment, a particular group of customers, a segment of the product range (Porter, 1980).

For Porter (1986), the three generic strategies outlined above are incompatible. Thus, if a company tries to take advantage of all these strategies simultaneously, it will fail on all fronts.

According to Porter, a company that wants to succeed over the long term must choose only one of the three generic strategies. Applying more than one will result in a "stuck in the middle" situation; in other words,

the company will be bogged down in the middle path and thus emerge with lower profits and no competitive advantage. Indeed, the least successful companies adopt an unclear or inconsistent strategy, trying to reconcile cost domination and differentiation (Soparnot, 2010).

Nevertheless, Porter (1986) does not rule out the application of more than one strategy in the case of a company with several independent entities by setting a single strategy for each entity.

On the other hand, some researchers believe that a combined or hybrid strategy is not only possible but highly desirable, especially in markets characterized by intense competition, rapid technological change, and short product cycles (Leroy, 2008).

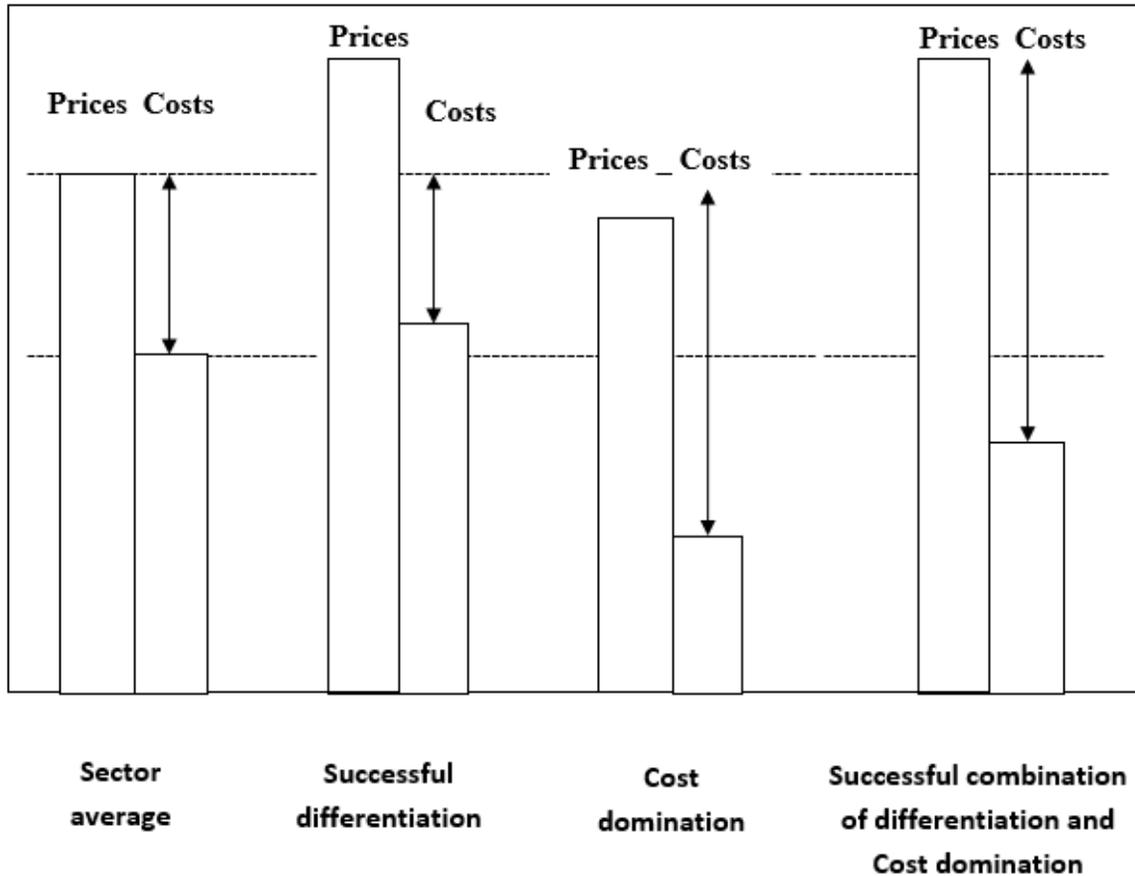


Fig. 2. Effectiveness of a Hybrid Strategy

Source: Soparnot (2010)

Figure 2 shows that a company can outmaneuver rivals who adopt a single strategy and achieve interesting results by combining differentiation and cost domination (Soparnot, 2010).

Of Michael Porter’s three generic strategies, differentiation and focus appear to be the most suitable and most widely used by SMEs (Boyer, 1994), while the strategy of cost domination, based on a logic of volume production requiring heavy investment and consequent resources, is often far from accessible to SMEs. However, these findings differ from one business sector to another.

2.3.2. Other strategies

In the agri-food industry, beyond Porter's generic strategies, a documentary analysis highlights the adoption of various strategies by Spanish and Turkish companies. These strategies primarily revolve around innovation, marketing diversification, and collaboration.

2.3.2.1. Innovation strategy

INSEE (Institut National de la Statistique et des Etudes Economiques, 2020) defines innovation as a significant change of a technical, commercial, organizational, structural, logical, or relational nature that has a significant impact on the company's activity and competitive environment. It is based on the results of new technological developments or the use of other knowledge acquired by the company.

On the one hand, we distinguish two dimensions of innovation (Rauscher, 2008). Firstly, Incremental innovation involves permanent technological improvements, enabling an existing product or service to evolve and surpass the competition. The goal is not to create a new need but to position the product in terms of continuity of use, price, and marketing. Secondly, Radical innovation represents a revolutionary differentiation from the competition, creating a significant departure from the usual way of satisfying a need. It is essential for shaking up existing markets and conquering new ones.

On the other hand, the OCDE & Statistical Office of the European Communities (2005) have identified four classes of innovation: technological innovation, which encompasses new products and production processes; marketing innovation, which targets the company's customers and markets; and organizational innovation, which concerns the introduction of new organizational forms.

2.3.2.2. Diversification strategy

According to Détrie (2005), diversification goes beyond simply broadening a company's field of activity. Whereas specialization relies on applying a single set of skills, diversification requires using a new set of skills, required by the new competitive universe into which the company is entering.

There are various reasons why companies diversify, as outlined by Détrie & Ramanantsoa (1988). Investment diversification occurs when a company, enjoying a strong position in a growth sector, views diversification as an investment of surplus financial resources. Consolidation diversification, on the other hand, involves a company diversifying to enhance its current competitive position, particularly if it is considered average, thereby consolidating the position of its existing activities. Redeployment diversification is pursued by companies in a strong market position, seeking to secure their future by venturing into other, more profitable sectors when their core business lacks appeal. Finally, diversification for survival becomes imperative when a company finds itself in a precarious competitive position.

At this point, we should point out the difference between strategic diversification, which enables the company to establish itself in several Strategic Business Areas, and marketing diversification, which covers the following two avenues: product diversification (new products for existing customers) and market diversification (new customers for existing products). The latter is still considered a specialization strategy as long as the company does not need to apply new skills (Dussauge et al., 2009).

2.3.2.3. Alliance and partnership strategy

Since the 1980s, alliance and partnership strategies have grown considerably, partly due to globalization and partly due to technological change. According to Bouayad (1996), *It is difficult, if not impossible, for a company to operate independently in an increasingly complex and evolving set of activities while positioning itself in ever wider and more unstable geographical areas, hence the importance of resorting to alliances and partnerships.*

An alliance is a collaboration between competing or potentially competing organizations. Partnerships, on the other hand, involve collaboration between non-competing companies (Koenig, 2004).

Gemser et al. (2004) have shown that a strategy based on strategic alliances on an international scale is the preferred route to internationalization for SMEs. Indeed, implementing this strategy improves access to the complementary resources required to create new products, exploit distribution channels, minimize production costs, and gain access to know-how, which is one of the main reasons for SME internationalization.

3. Hypothetical framework

Based on the literature review we envision the following central and operational hypotheses.

Central hypothesis:

Successful Moroccan SME exporters adopt a particular strategy.

Operational Hypotheses:

H1: Successful Moroccan SME exporters follow a differentiation strategy.

H2: Successful Moroccan SME exporters follow a focus or niche strategy.

H3: Successful Moroccan SME exporters follow a strategy of cost domination.

H4: Successful Moroccan SME exporters follow an innovation strategy.

H5: Successful Moroccan SME exporters follow a strategy of alliances and partnerships.

H6: Morocco's successful SME exporters follow a marketing diversification strategy.

4. Materials and Methods

In the present work, we have opted for a positivist stance and a deductive approach to shed light on the strategic choices adopted by successful Moroccan SME exporters operating in the agri-food sector. Determining the precise count of these enterprises proves challenging. However, an estimate of around 300 companies is derived from the directory obtained from the Kompass website.

To conduct our survey, we utilized a convenience sampling method by distributing a questionnaire to as many target companies as possible. This approach allowed us to receive 25 completed and usable questionnaires from sales managers of the respective companies. Before this, we conducted a pre-test with one exporting SME to evaluate the clarity of the questions, the time needed for responses, and potential biases associated with the questionnaire's structure.

We applied cross-tabulations (Chi-square) and correspondence analysis (CA) to verify our research hypotheses. Correspondence analysis seeks to establish associations between two variables within a population through graphical representations of statistical outcomes derived from a contingency table. This analytical approach is particularly applicable when dealing with qualitative or nominal data.

5. Results

The export performance of companies can be assessed by several indicators, which may be quantitative or qualitative. In this study, we have focused on qualitative indicators, which enable us to assess the export performance of SMEs, with particular emphasis on their commercial aspect (taking into account turnover evolution) due to their accessibility.

5.1. Descriptive findings of the survey

Overall, 44% of our sample declared an average export performance, 32% a strong performance, and 8% a very strong performance, while 16% declared a relatively weak performance (Figure 3). Figure 4 shows a positive trend in export turnover for 72% of SMEs surveyed, against 28% who reported a decline in sales. On the other hand, figure 5 shows that the order of strategies applied by companies is as follows: 33.3% of SMEs in our survey apply a marketing diversification strategy, 24.4% an innovation strategy, 17.8% an alliance and partnership strategy, while just 8.9% of companies choose a cost domination strategy and 6.7% a differentiation strategy.

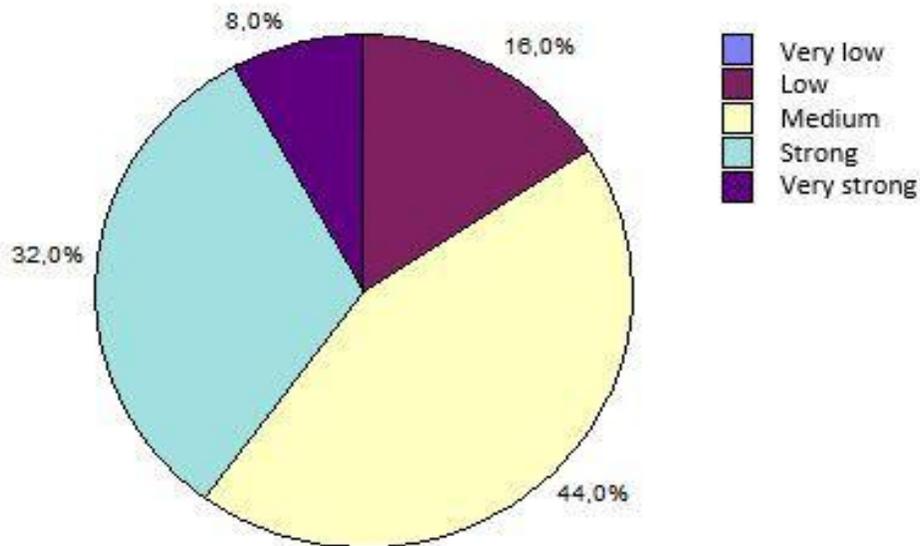


Fig 3. Perceived Export Performance

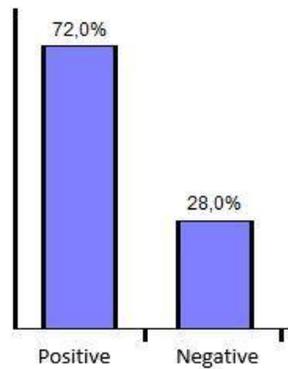


Fig. 4. Evolution of Export Turnover

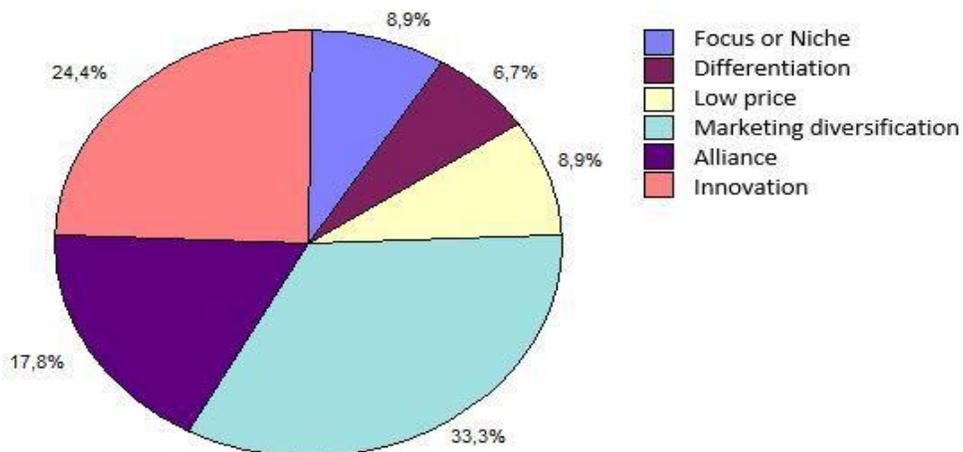


Fig. 5. Strategies Adopted by the Moroccan SMEs

5.2. Strategic choice and company performance

As for the relationship between the SME export strategies variable and the evolution of the export turnover variable, we obtain the following table:

Table 1: Relationship between the strategic choice and the evolution of the company’s export turnover

STRATEXP	EVOLCHEXP	Positive	Negative	TOTAL
Focus or Niche		2	2	4
Differentiation		3	0	3
Low price		4	0	4
Marketing diversification		12	3	15
Alliance		4	4	8
Innovation		10	1	11
TOTAL		35	10	45

Khi2 = 8,50 p-value = 0,1309.

The relationship between the strategic choices made by Moroccan SME exporters and the evolution of their export sales is not very significant. However, once again, this table shows that almost 4/5 of the responses claiming a positive evolution of their sales correspond to strategies of marketing diversification, innovation, alliance, and cost domination.

At this level, the Correspondence Factorial Analysis enabled us to highlight the links between strategic choices and export performance (Figure 6). The variance represented by the two factorial axes is 95.2%. This analysis shows that Moroccan SME exporters exhibiting strong performances employ strategies focused on cost reduction, differentiation, and innovation, confirming hypotheses 1, 3, and 4. Conversely, SMEs with medium to weak performances tend to adopt a strategy involving marketing diversification, alliances, and focus or niche, leading to the non-confirmation of hypotheses 2, 5, and 6.

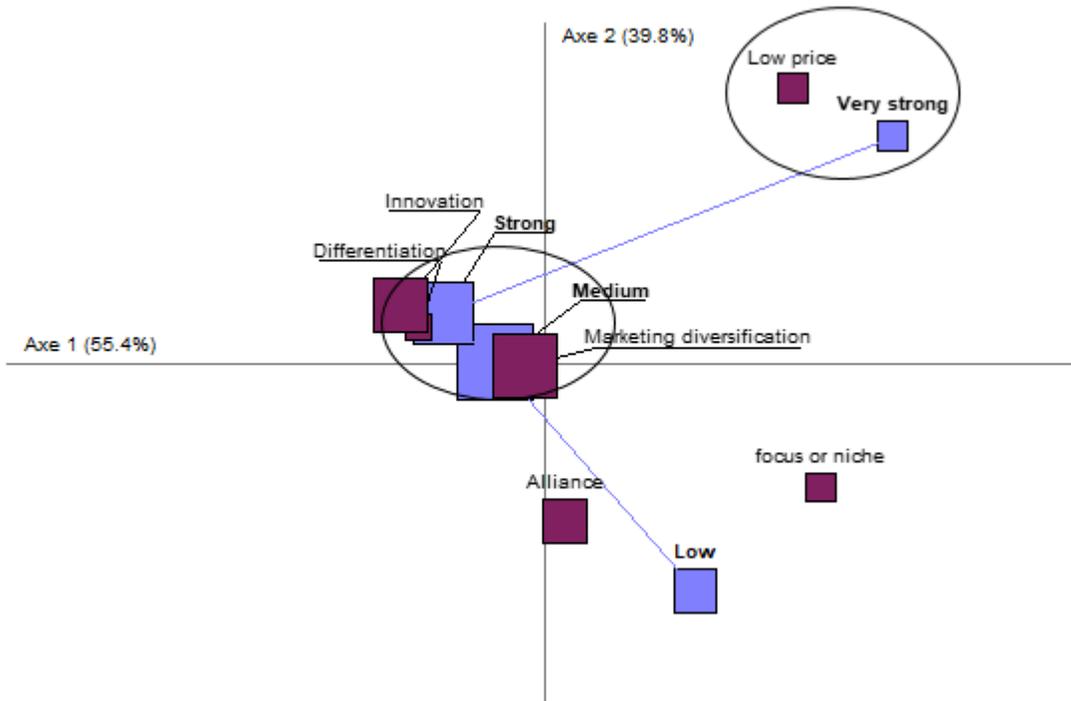


Fig. 6. Factor Map of the Relationship between Strategic Choices and Export Performance

6. Discussion

To summarize, our central hypothesis predicted the existence of a relationship between strategic choice and the performance of Moroccan SME exporters in the agri-food sector. According to our observation, strategic choice has almost no impact on the evolution of export sales (commercial performance). These results are understandable and rational. Indeed, if there were a winning strategy for exporting agri-food SMEs, all companies would apply it, and there would not be all these different strategic orientations. Moreover, as we pointed out earlier, each strategy chosen by the company enables it to acquire a competitive advantage that will subsequently bring benefits on several levels.

Similarly, the SMEs in our survey indicated that they use several strategies in parallel rather than just one. It is known as a hybrid strategy, which can be very promising, contrary to Porter's (1986) view that a company's attempt to benefit from the advantages of several strategies is bound to lead to total failure.

Therefore, no single strategy guarantees significant export performance, but rather combinations of several strategies that vary according to the SME's internal skills and the constraints of its environment.

7. Conclusion

This research aimed to study the existence or otherwise of a strategic choice likely to help Moroccan SMEs improve their international performance, using companies in the agri-food sector as a framework for analysis.

According to the survey, Moroccan SME exporters apply different strategies. However, the cross-tabulation analysis did not reveal any impact of strategic choice on company performance (mainly commercial performance). Thus, contrary to our hypothesis, no one strategy is better than another for exporting. The Factorial Correspondence Analysis (FCA) results did, however, show the preeminence of cost domination, innovation, and differentiation over the other strategies in terms of satisfactory performance. However, these strategic options are not mutually exclusive. The companies in our sample apply hybrid strategies on the international stage. Several combinations are mentioned, but coordination between the strategy of cost domination and marketing diversification, or the latter with innovation, remains the combination with the strongest international performance for Moroccan agri-food SMEs.

8. Limitations and directions for future research

This research has several limitations. Firstly, the inability to collect quantified commercial and financial data hindered the determination of actual company performance. Secondly, the absence of longitudinal data prevented tracking the SMEs' strategy evolution and success or failure over an extended period.

Finally, it would be helpful to study the relevance and success of the strategies envisaged by Moroccan agri-food exporting SMEs over time by analyzing the performance of these companies over a long period. It would also be possible to carry out more in-depth comparative studies with Morocco's competitors in the agri-food sector, notably through surveys, while targeting SMEs operating in the same sub-sectors to homogenize and enrich the results.

Authors' contributions: Kaoutar Benyetho conceived the idea and wrote the paper; All authors collected the Data, provided critical feedback, and helped shape the research, analysis, and manuscript.

Conflict of Interest: The authors declare no conflict of interest.

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