

Exploring the Potential of Morocco – Türkiye Trade Relations: Opportunities and Challenges

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Abstract: This study analyzes the current state and potential of trade and economic cooperation between Morocco and Türkiye. The analysis is based on a comprehensive review of existing literature, data from international organizations, and interviews with key stakeholders in both countries. The study explores the historical context of the trade relationship between the two countries and identifies key areas for collaboration, including agriculture, textiles, energy, and transportation. The results show that trade between Morocco and Türkiye has been growing steadily in recent years, with a total trade volume of \$ 2.2 billion in 2020. Energy trade, particularly in renewable energy, has become an important area of cooperation between the two countries. Morocco has ambitious targets to generate 52% of its electricity from renewable sources by 2030, while Türkiye is looking to increase its renewable energy capacity to 38 GW by 2023. However, the study also identifies challenges to further trade and economic cooperation, including transportation infrastructure, bureaucratic barriers, and limited awareness of business opportunities. The study provides recommendations for addressing these challenges, including improving transportation infrastructure, simplifying bureaucratic procedures, and increasing business-to-business contacts between the two countries.

Overall, the study highlights the significant potential for trade and economic cooperation between Morocco and Türkiye, particularly in the areas of renewable energy and agriculture. By addressing the identified challenges and pursuing collaborative initiatives, both countries can benefit from increased trade and economic growth.

Keywords: Morocco, Türkiye, Energy Trade

JEL Classification: F50

1. Introduction

Trade relations and economic cooperation between countries have become increasingly important in the globalized world. This has led to the emergence of regional economic integration agreements, such as the African Continental Free Trade Area (AfCFTA) and the European Union (EU), which aim to promote trade and investment between member

states. In this context, the partnership between Morocco and Türkiye has gained momentum in recent years, as both countries seek to deepen their economic ties and explore new opportunities for cooperation.

This paper aims to provide an overview of the current state of trade relations between Morocco and Türkiye and explore potential areas for further collaboration. The paper will first analyze the economic performance and trade patterns of the two countries. It will identify the main opportunities for trade and investment between the two countries, with a particular focus on agriculture, energy, textiles, and some of challenges such as transportation, regulatory barriers and political instability. Finally, the paper will provide recommendations for policymakers in both countries to enhance their economic cooperation and maximize the benefits of their partnership.

In recent years, the issue of climate change has become an urgent and pressing concern for the global community. The adverse impacts of greenhouse gas emissions and the resulting changes in weather patterns and natural systems have made it imperative for nations to take bold steps towards mitigating the effects of climate change. One such step is the transition to renewable energy sources, which has gained significant momentum in the last decade. This shift towards renewable energy sources is driven by the need to reduce greenhouse gas emissions and to secure a sustainable and reliable energy supply. While there has been progress towards this transition in many parts of the world, there remain significant challenges that need to be addressed. This paper examines the challenges and opportunities of the transition to renewable energy sources, with a focus on the experiences of Morocco and Türkiye. The paper provides an overview of the renewable energy sector in these countries, analyzes the challenges and opportunities of the transition to renewable energy, and offers recommendations for policymakers and stakeholders

1.1. Objectives

The primary objectives of this article are to:

- Identify the potential sectors for trade between Morocco and Türkiye
- Analyze the challenges and opportunities that exist in the current economic relationship
- Provide recommendations to enhance economic cooperation between the two countries

1.2. Methodology

The methodology for this report involved conducting a comprehensive analysis of the economic and trade relations between Morocco and Türkiye. This analysis was based on a review of relevant literature, reports, and data sources, as well as interviews with key stakeholders in both countries, including government officials, business leaders, and experts in various fields.

To gather data and information, we used a variety of sources, including official government statistics, industry reports, academic publications, and media sources. We also conducted surveys and interviews with key stakeholders to gather additional insights and perspectives on the economic and trade relations between the two countries.

To analyze the data and information gathered, we used a combination of qualitative and quantitative methods. Qualitative analysis involved reviewing and synthesizing relevant literature and reports to identify key themes and trends in the economic and trade relations between Morocco and Türkiye. Quantitative analysis involved analyzing and interpreting data from various sources to identify patterns and trends in trade flows, investment, and other economic indicators.

Overall, the methodology used for this report was designed to provide a comprehensive and rigorous analysis of the economic and trade relations between Morocco and Türkiye. By using a combination of qualitative and quantitative methods, and drawing on a wide range of data sources, we aimed to provide a balanced and accurate assessment of the opportunities and challenges for economic cooperation between the two countries.

2. Opportunities

In this section, we will explore the potential opportunities for trade and economic cooperation between Morocco and Turkey in the areas of agriculture, textile, and energy. These three sectors have been identified as key areas for collaboration based on their current state and future growth potential. We will provide an overview of the current status of trade and investment in each sector, as well as the challenges and opportunities for further cooperation. Additionally, we will highlight specific initiatives and projects that have been implemented or proposed in each sector to enhance bilateral relations between Morocco and Turkey. By examining these opportunities, we aim to provide insights into the potential for increased trade and economic growth between the two countries in the coming years.

2.1. Agriculture

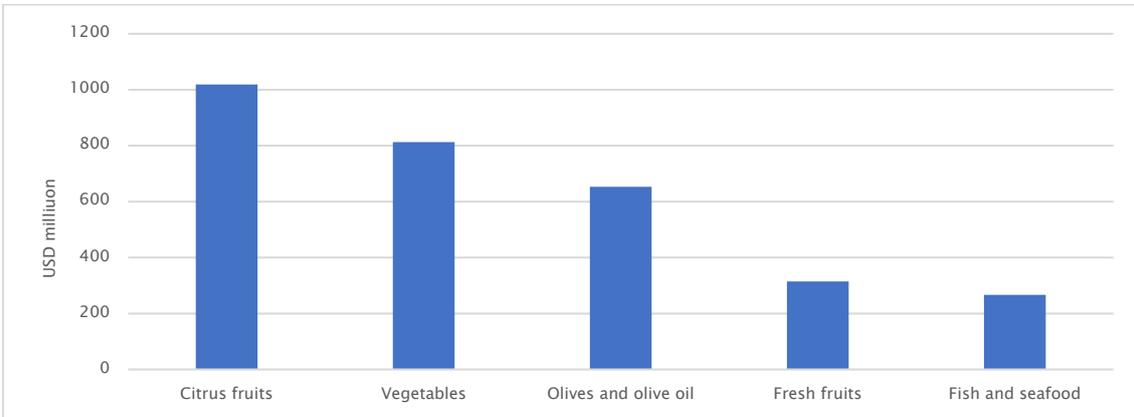
Morocco and Türkiye have complementary strengths in the agricultural sector, making it a promising area for cooperation. Morocco is a significant producer of fruits and vegetables, with key exports including citrus fruits, olives, and vegetables. According to the International Trade Centre, Morocco exported \$2.8 billion worth of fruits and vegetables in 2019. Türkiye, on the other hand, is a major producer of cereals and other crops such as pulses and nuts. In 2019, Türkiye exported \$1.3 billion worth of fresh or dried nuts, fruits, and other edible parts of plants, as well as \$1.1 billion worth of cereal grains (International Trade Centre [ITC], 2021).

Collaboration in the agricultural sector could allow Morocco to leverage Türkiye's expertise in dryland farming techniques, which are particularly relevant given Morocco's semi-arid climate. « *Les zones arides, semi-arides et subdésertiques au Maroc représentent plus de 90 % de la superficie totale* ». (Éric Roose, 2014). Türkiye, on the other hand, could benefit from Morocco's expertise in sustainable agriculture practices and irrigation techniques.

Despite the potential for cooperation, there are significant regulatory barriers to trade between the two countries, particularly with respect to phytosanitary and sanitary regulations. According to the Turkish Ministry of Trade, these barriers have limited the export potential of Turkish agricultural products to Morocco. For example, Türkiye has faced restrictions on the export of tomatoes and peppers to Morocco due to concerns over the presence of pests. These barriers will need to be addressed to fully realize the potential of agricultural cooperation between the two countries (Turkish Ministry of Trade, 2021).

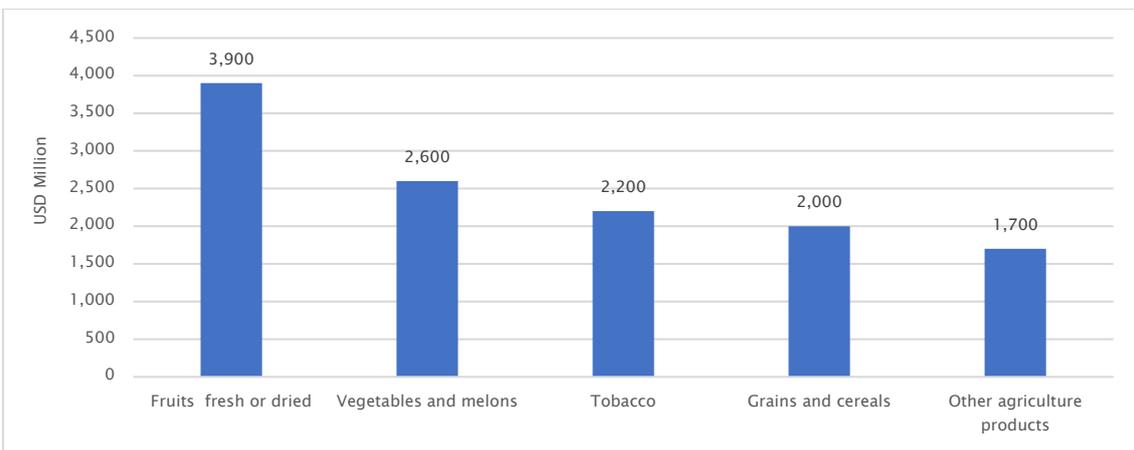
Data from the International Trade Centre shows that the volume of trade in agricultural products between Morocco and Türkiye has been relatively modest in recent years. In 2019, Morocco imported \$487 million worth of agricultural products from Türkiye, while exporting \$100 million worth of agricultural products to Türkiye. However, there is significant potential for growth in this area (International Trade Centre [ITC], 2021).

Morocco and Türkiye have a strong agricultural sector, and there is great potential for trade in agricultural products. Morocco is known for its citrus fruits, olives, and vegetables, while Türkiye is a major producer of fruits such as figs, apricots, and cherries. In 2020, Morocco's total agricultural exports amounted to \$ 3.93 billion, while Türkiye's total agricultural exports amounted to \$ 20.8 billion (Trade Map, 2021).



Sources: (TUIK, 2023)

Figure 1. Top 5 Agricultural Products Exported by Morocco in 2020



Sources: (TUIK, 2023)

Figure 2. Top 5 agricultural products exported by Türkiye in 2020

By increasing trade in agricultural products, both countries could benefit from access to a wider range of produce and increased exports. In particular, there is potential for Morocco to increase its exports of citrus fruits, vegetables, and olives, while Türkiye could increase its exports of fresh and dried fruits, vegetables, and tobacco.

In addition to traditional agricultural products, there is also significant potential for trade in organic and specialty foods between Morocco and Türkiye. Morocco has seen a rapid expansion in its organic agriculture sector in response to increasing domestic and international demand (El Ghmari, Harbouze, & Bilali, 2019). In 2020, Morocco had a total of 888,000 hectares of organic farming land, making it one of the largest producers of organic food in Africa (El Ghmari, Harbouze, & Bilali, 2019).

Türkiye has also seen significant growth in its organic agriculture sector in recent years. According to the Food and Agriculture Organization (FAO), Türkiye had a total of 1.8 million hectares of organic farming land in 2020, making it one of the largest producers of organic food in the world (Food and Agriculture Organization., n.d). However, there is still room for improvement in the organic farming sector in Türkiye, as many small-scale farmers struggle with access to information, technical support, and markets. By addressing these challenges, Türkiye could further expand its organic agriculture sector and capitalize on the growing demand for organic food products in global markets (İsmet & Cevahir, 2019).

Morocco and Türkiye both have a strong agricultural sector, and there is great potential for trade in agricultural products. Morocco is known for its citrus fruits, olives, and vegetables, while Türkiye is a major producer of fruits such as figs, apricots, and cherries. In 2020, Morocco's total agricultural exports amounted to \$ 3.93 billion, while Türkiye 's total agricultural exports amounted to \$ 20.8 billion. By increasing trade in agricultural products, both countries could benefit from access to a wider range of produce and increased exports (Trade Map, 2021).

2.2. Textiles

Textiles have been a key driver of trade between Morocco and Türkiye, with both countries boasting competitive textile industries that are ripe for collaboration. In 2019, Türkiye exported \$189.3 million worth of textiles to Morocco, while Morocco exported \$17.2 million worth of textiles to Türkiye (International Trade Centre [ITC], 2021). Morocco's textile industry has been growing rapidly in recent years, with a focus on fast fashion and niche markets. According to the Moroccan Ministry of Industry, Trade and Green and Digital Economy, the country's textile exports were worth MAD 41.3 billion (approximately \$4.6 billion) in 2020, up 4.3% from the previous year. The sector has been boosted by the country's favorable trade agreements with the European Union, which is a major market for Moroccan textiles. In addition, the industry employs over 200,000 people and accounts for around 15% of Morocco's total exports (Moroccan Ministry of Industry and Trade, s.d.).

Meanwhile, Türkiye's textile industry is one of the largest in the world, with over 52,000 companies employing around 1.6 million people. The industry exports around \$15 billion worth of textiles annually, with key markets including the European Union, the United States, and the Middle East (Turkish Ministry of Trade, 2021). Turkish textile companies have been increasingly investing in Morocco in recent years, drawn by the

country's strategic location, skilled workforce, and favorable business environment (Turkish Ministry of Trade, 2021)

By collaborating in the textile industry, Morocco and Türkiye can leverage each other's strengths to increase their global competitiveness and gain access to new markets. For instance, Morocco's focus on fast fashion and niche markets complements Türkiye's expertise in high-end textiles and technical fabrics, creating opportunities for joint ventures and complementary supply chains (Turkish Ministry of Trade, 2021).

Furthermore, by aligning their textile standards and regulations, the two countries can reduce trade barriers and enhance trade flows, as demonstrated by the free trade agreement between Morocco and Türkiye that entered into force in 2006 (Koubida & Brim, 2019). Overall, the textile industry represents a promising avenue for growing trade between Morocco and Türkiye, one that can create jobs, increase exports, and drive economic growth for both countries.

The exchange of expertise and technology between the two countries can improve the quality and efficiency of their respective textile industries. For example, Morocco could benefit from Türkiye's advanced machinery and production techniques, while Türkiye could learn from Morocco's expertise in natural fiber production and handicrafts.

Collaborative efforts can also develop new markets for Moroccan and Turkish textiles. By working together, the two countries could explore new markets and promote their textiles jointly, which could lead to increased sales and higher profits. However, there are also significant challenges in the textile sector, including competition from other low-cost producers such as China and Bangladesh, as well as regulatory barriers to trade. According to the Turkish Ministry of Trade, Türkiye has faced restrictions on the export of textiles and clothing to Morocco due to concerns over quality standards (Turkish Ministry of Trade, 2021).

These barriers will need to be addressed to fully realize the potential of cooperation in the textile sector. Yet, according to data from the International Trade Centre, the volume of trade in textiles and clothing between Morocco and Türkiye has been relatively modest in recent years. In 2019, Morocco imported \$1.3 billion worth of textiles and clothing from Türkiye, while exporting \$99 million worth of textiles and clothing to Türkiye (ITC, n.d.)

2.3. Energy

Morocco is a net importer of energy, while Türkiye has significant energy resources. Collaboration in the energy sector could help Morocco meet its energy needs and reduce its reliance on imports.

In recent years, energy trade between Morocco and Türkiye has been on the rise due to the increasing demand for energy and the development of renewable energy resources. Morocco has set an ambitious goal of generating 52% of its electricity from renewable sources by 2030, making it a leading renewable energy producer in the region (International Energy Agency, 2019). Türkiye, on the other hand, is a significant energy importer with a growing demand for energy to support its economic growth.

According to the Moroccan Ministry of Energy, Mines, and Environment, the total trade volume between Morocco and Türkiye in 2020 was about \$ 2.2 billion, with energy being a significant component of their trade relations. The value of Morocco's exports of refined oil products to Türkiye increased by 77% in 2020, reaching \$ 222 million (Moroccan Ministry of Energy, Mining and Environment, 2019). The rise in demand for Moroccan refined oil products in Türkiye is due to the Turkish government's efforts to reduce its dependence on oil and gas imports.

Renewable energy has also become an important area of cooperation between the two countries. Morocco has significant potential for renewable energy generation, particularly in solar and wind power. It has launched several large-scale renewable energy projects in recent years, such as the Noor Ouarzazate Solar Complex, which is the largest concentrated solar power plant in the world (Power Technology, 2020), and the Tarfaya Wind Farm, which is the largest wind farm built to date on the African continent (Nareva, n.d)

Turkish companies have been involved in several renewable energy projects in Morocco. For example, TAV Insaat won a contract to build the Noor Ouarzazate Solar Complex, while Akfen Renewable Energy developed a part of the Tarfaya Wind Farm. These projects are part of Morocco's efforts to increase its renewable energy capacity and reduce its dependence on fossil fuels.

Türkiye is also looking to increase its renewable energy capacity to 38 GW by 2023, which creates opportunities for Moroccan renewable energy companies to export their products and expertise to the Turkish market. This could lead to further cooperation

between the two countries in the energy sector and contribute to the development of renewable energy in the region.

In conclusion, energy trade between Morocco and Türkiye has been growing in recent years, with a particular focus on oil and gas and renewable energy. As Morocco becomes a leading renewable energy producer in the region, there are opportunities for Turkish companies to invest in and develop renewable energy projects in Morocco. Additionally, as Türkiye looks to increase its renewable energy capacity, there is future potential for Moroccan renewable energy companies to export their products and expertise to the Turkish market.

3. Challenges

The chapter on challenges focuses on the potential barriers that may impede the development of trade and economic cooperation between Morocco and Turkey. In this chapter, we will explore three key areas that pose significant challenges: transportation infrastructure, regulatory barriers, and political instability.

First, transportation infrastructure is a critical factor in facilitating trade between countries. However, both Morocco and Turkey face significant challenges in this area, including inadequate road and rail networks, outdated ports, and limited air transport options. These issues can result in delays, increased costs, and decreased competitiveness, all of which can hinder trade relations.

Second, regulatory barriers can create significant obstacles for businesses seeking to engage in cross-border trade. These barriers may include complicated customs procedures, restrictive regulations, and bureaucratic red tape, which can slow down the trade process and increase costs. Addressing these issues requires a collaborative effort between the two countries and a commitment to simplifying regulations and improving the ease of doing business.

Finally, political instability can pose a significant challenge to trade and economic cooperation. Instability can lead to uncertainty and insecurity for businesses, making them hesitant to invest in the region. Both Morocco and Turkey have experienced political unrest in the past, and the potential for instability remains a concern. Addressing these challenges requires a coordinated effort to promote political stability and foster an environment of trust and cooperation between the two countries.

Overall, the challenges identified in this chapter highlight the need for a comprehensive approach to promoting trade and economic cooperation between Morocco and Turkey. By addressing these challenges and pursuing collaborative initiatives, both countries can benefit from increased trade and economic growth.

3.1. Transportation

Transportation is a major challenge in Morocco, with a lack of adequate infrastructure and services leading to significant inefficiencies in the sector. The country's road network, which is the main mode of transportation for goods and people, suffers from poor maintenance and limited capacity, resulting in congestion and high travel times. According to the World Bank, only 20% of Morocco's national road network is in good condition, with the rest in fair to poor condition (World Bank, 2019).

In addition to the road network, Morocco's rail and air transportation systems also face challenges. The country's rail network is outdated and requires significant investment to modernize and expand its capacity, particularly for freight transport. According to the Moroccan Ministry of Equipment, Transport, Logistics and Water, the country's railway network covers only 2,100 kilometers, with limited connectivity to major economic centers. The country's air transportation system, while relatively modern, is also limited in terms of capacity and connectivity, with only a few major airports serving international destinations.

The inadequate transportation infrastructure in Morocco has significant economic and social costs. The high transportation costs and long travel times increase the cost of doing business in the country, reducing its competitiveness and hindering economic growth. Additionally, the poor transportation services limit access to education, healthcare, and other essential services, particularly for rural populations.

To address these challenges, the Moroccan government has launched several initiatives to improve transportation infrastructure and services. The government has established several public-private partnerships to develop and modernize transportation infrastructure, including the Tangier-Med port and the Casablanca tramway system (World Bank, 2019).

In conclusion, transportation remains a significant challenge in Morocco, with a lack of adequate infrastructure and services leading to inefficiencies and high costs. However, the government's initiatives to improve transportation infrastructure and services, including significant investments in road and rail networks, and the development of public-private partnerships, provide hope for the future of transportation in Morocco.

3.2. Regulatory Barriers

Differences in technical standards and customs procedures have created barriers to trade between the two countries.

Regulations can also act as a barrier to trade between countries. Each country has its own set of rules and regulations that can make it difficult for businesses to operate in another country. These regulations can relate to product safety, environmental standards, labelling requirements, and more. In some cases, regulations can be designed to protect domestic industries from foreign competition.

For example, Morocco and Türkiye have different regulations related to product safety and labelling requirements. This can make it difficult for businesses in one country to sell their products in the other country without making significant changes to their products and packaging. In addition, regulations related to customs procedures, documentation requirements, and other bureaucratic processes can also add significant costs and time to the shipping process.

One way to address these regulatory barriers is through the use of harmonization agreements, where countries agree to adopt common regulations and standards. The EU–Morocco Association Agreement, for example, aims to harmonize regulations related to product safety, environmental standards, and other areas to facilitate trade between the two regions.

Another potential solution is to streamline customs procedures and documentation requirements through the use of technology. For example, the use of electronic documentation and automated customs clearance systems can reduce the time and cost of shipping goods between countries.

Data on the specific effects of regulatory barriers to trade between Morocco and Türkiye are limited. However, a 2020 report by the World Bank notes that Morocco has made progress in recent years in reducing trade barriers through regulatory reforms, including simplifying customs procedures and adopting international standards. The report also highlights the need for further reforms to address remaining regulatory barriers to trade (World Bank Organisation, 2020).

3.3. Political Instability

Instability in some parts of the region has affected trade and investment in the region, making it difficult to establish long-term economic partnerships. Political instability is another significant barrier to trade, as it can lead to uncertainties and disruptions in supply chains, affecting the transportation and logistics between countries. Morocco and Türkiye have experienced some political instability in recent years, which has affected their economic and trade relations.

For example, Türkiye has been facing political instability due to the ongoing conflicts with neighboring countries, such as Syria and Iraq. This has led to disruptions in trade routes and affected the transportation of goods between Türkiye and Morocco. Morocco has also experienced political instability in the past, including protests and civil unrest, which have disrupted trade and investment.

The effects of political instability on trade can be severe, as it can lead to increased costs, delays, and risks. It can also make it difficult for companies to plan for the future and make long-term investments.

Another example is the ongoing tensions between Morocco and Algeria over the Western Sahara. The two countries have been in a long-standing dispute over the region, which has led to border closures and restrictions on trade and movement between the two countries. This has created challenges for businesses looking to operate in the region, as well as increased costs and risks associated with transport and logistics.

In addition, both Morocco and Türkiye have experienced political instability and uncertainty in their domestic politics. In Morocco, there have been protests and unrest over issues such as corruption and economic inequality, which can create risks for investors and businesses. Similarly, in Türkiye, there have been concerns over the government's response to political dissent and human rights violations, which can create uncertainty for investors and affect the country's reputation as a reliable trading partner.

Finally, bureaucratic procedures and administrative hurdles can also present a challenge to trade between Morocco and Türkiye. The lack of transparency and predictability in customs procedures can increase the cost and time required for importing and exporting goods.

Potential solutions to political instability include the establishment of stable political systems and strong institutions that promote economic growth and trade. Governments

can work to create a stable business environment by implementing policies that support investment and entrepreneurship. Additionally, increased regional cooperation and diplomatic efforts can help to resolve conflicts and reduce political tensions that can disrupt trade.

4. Recommendations

Based on the analysis, it is recommended that both Morocco and Türkiye continue to focus on expanding their trade relations and exploring new opportunities for collaboration, particularly in the areas of renewable energy, textiles, and agriculture.

In terms of renewable energy, Morocco's significant potential for solar and wind power and Türkiye's growing demand for renewable energy make for a strong potential partnership. Moroccan renewable energy companies should consider exporting their products and expertise to the Turkish market, while Turkish companies should continue to invest in and develop renewable energy projects in Morocco.

Regarding textiles and agriculture, both Morocco and Türkiye have established industries in these sectors, and collaboration could lead to increased competitiveness and lower production costs. Companies from both countries could explore joint ventures and partnerships to take advantage of each other's strengths and resources.

It is also recommended that both countries work to address the transportation challenges that currently limit trade between them. This could involve improving infrastructure, reducing trade barriers, and increasing air and sea connectivity. By addressing these challenges, the potential for increased trade and collaboration can be fully realized.

In addition, policymakers should also focus on facilitating cultural and educational exchange programs, as these can help build stronger relationships between the two countries and provide valuable opportunities for learning and growth.

Overall, there are many opportunities for Morocco and Türkiye to deepen their trade relations and collaborate in a range of sectors. By taking steps to address the challenges and foster a spirit of cooperation, both countries can benefit economically and socially.

5. Conclusion

In conclusion, there is great potential for increased economic cooperation between Morocco and Türkiye. The two countries have complementary economies and share a strategic location at the crossroads of Europe, Africa, and the Middle East. As outlined in this report, there are several areas of opportunity for collaboration, including trade, investment, tourism, and energy.

To fully realize the potential of this partnership, both countries must take proactive steps to address the challenges that exist. This includes addressing barriers to trade and investment, enhancing transportation infrastructure, and promoting cultural and educational exchanges.

Morocco and Türkiye have already taken important steps towards deepening their economic ties, including the signing of several bilateral agreements and the establishment of joint ventures in key sectors such as textiles and energy. These efforts should be continued and expanded upon to create a more comprehensive and mutually beneficial economic relationship.

Moreover, the potential benefits of the Morocco–Türkiye partnership extend beyond the two countries themselves. Enhanced economic cooperation between these two countries could contribute to regional stability and economic development, and serve as a model for other countries in the region.

In short, the Morocco–Türkiye partnership represents a promising opportunity for both countries to expand their economic horizons and contribute to regional prosperity. With sustained efforts to address challenges and enhance cooperation, the potential benefits of this partnership can be fully realized.

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