

The Rose of Kalaat M'Gouna: A Moroccan Local Product seeking Sustainable Development

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ABSTRACT

The rose constitutes an emblematic terroir product of the Mgoun and Dadès valleys. Its evolution has been closely linked to the economic and social transformations experienced by these two territories. Over time, both production and consumption models have undergone profound changes, leading to the emergence of a plurality of actors within the value chain. This dynamic has been accompanied by new rules and strategies for value appropriation, resulting in a fragmented territorial system marked by tensions and conflicts of interest.

At the same time, the state has intervened to frame and regulate the sector through agricultural policies, notably under the second pillar of the Plan Maroc Vert. While this intervention aims to enhance the value of terroir products, it has also intensified ongoing transformations and increased the complexity of the territorial system. In this context, the conditions required to integrate the rose sector into a coherent territorial project capable of generating sustainable territorial development remain constrained.

This article seeks to examine the major transformations shaped by rose production in the Dadès and Mgoun valleys, as well as to assess the role of public agricultural policies in promoting terroir products. It is structured around the following questions: what structural changes has the rose sector undergone? Have cooperatives contributed to reducing the monopoly exercised by companies over this product? To what extent can the rose generate an integrated economic dynamic within a production chain connected to other sectors?

To address these questions, the analysis draws on selected findings from a field study conducted in the two valleys as part of a scientific collaboration between the Faculté des Lettres et Sciences Humaines de Marrakech, the Université Mohammed V à Rabat, and the Université de Montpellier. As the study was primarily based on interviews, the analysis presented here relies on the qualitative interpretation of the data collected through this fieldwork.

Keyword: Local Product, rose industry, traditional and modern management, Mgoun and Dades valleys

Introduction

Traditionally, rose cultivation in the Dadès and M'Goun river basins was limited to the edges of roadsides, where it formed thorny hedges to demarcate properties and protect farmers' crops. As an aromatic plant, the rose attracted little interest from local populations, who considered it a secondary, even marginal, product. This situation contributed to the limited local knowledge and skills associated with its cultivation, especially since its commercialization was not a major concern compared to other, more profitable agricultural products that

contributed more significantly to household income.

This product, however, has been affected by the economic and social transformations experienced by the two basins. Between then and now, production and consumption patterns have evolved, and the rose and its industry have become a key element in the development strategies implemented by local stakeholders. It has been used as a lever for economic, social, and territorial revitalization, with a view to combating poverty and precariousness. This interest has made the rose the emblematic product and territorial symbol of the Dadès and M'Goun regions, due to its national and international renown.

The study aims to analyze the main transformations that the rose product has undergone in the Dadès and M'Goun basins, as well as to examine the effects of agricultural public policies dedicated to the valorization of local products in this area.

The main areas of analysis of the rose value chain revolve around the following questions: What transformations has the rose product undergone at each stage of its supply chain—production, processing, and marketing? To what extent has the policy of creating cooperatives within the rose sector in the Dadès and M'Goun valleys made it possible to realize the principles of economic and social solidarity? Have the cooperatives succeeded in limiting the influence of corporations on the rose product? To what extent is this product capable of generating integrated economic dynamics, linked to other sectors of activity?

To analyze and address these issues, we draw upon our personal knowledge, as I am a native of the region, recent field investigations, and cross-references with the results of certain field studies, notably the one conducted in 2017 as part of a collaboration between the Research Laboratory on Resources, Mobility, and Attractiveness at the Faculty of Arts and Humanities in Marrakech, and Mohammed V University in Rabat and the University of Montpellier in France. In addition, the findings and conclusions of the investigations and our analyses are also based on triangular interviews with stakeholders and the affected population. The data analysis is grounded in a qualitative interpretation of the results, based on the following hypotheses:

- We postulate that the modernization of the rose product has led to a transformation of techniques and consolidated the stereotypical representation of the integration of women in development.
- We assume that the methods of modernizing the rose have not made it a product truly linked to economic production chains, capable of generating integrated development of the region.
- We assume that the agricultural policy of promoting the rose has contributed to complicating the system of actors within the sector.

Evolution of Rose Product Management Methods

Study Area

Dadès and M'Goun valley basins extend along the southern slopes of the Central High Atlas Mountains. They are bordered to the north by the southern edge of the Central High Atlas and to the south by the northern edge of the Jbel Saghro range. Administratively, this area falls within the Boumalne Dadès district, in the province of Tinghir, which belongs to the Drâa-Tafilalet region.



Figure 1: Location of the study area

Geographical Characteristics of the Area and their Relationship to the Rose Product

The Dadès and M'Goun river basins are located at altitudes exceeding 1,585 meters, a favorable factor for the expansion of rose cultivation. The climate, characterized by harsh winters and hot summers, is also a determining factor. The soil plays a crucial role in the quality of the product: both basins offer deep, slightly acidic alluvial soils, but poor in organic matter, conditions particularly well-suited to rose cultivation.

The climate also ensures favorable conditions during the flowering phase, contributing to a higher essential oil content. Low rainfall followed by warm, sunny weather promotes this process. However, the region remains generally arid, with low and irregular rainfall, averaging around 156 mm over a twenty-year period. Spring frost, coinciding with the flowering period, poses a significant threat to production, potentially affecting up to 80% of growth.

Traditional and Modern Management of Rose Products: What Transition and What are the limits?

The cultivation of roses in the Dadès and M'Goun basins dates back to ancient times, although its exact date of introduction remains difficult to determine. The cultivated variety is known as the "Damask rose," leading some researchers to suggest a Syrian origin, introduced to the region by Moroccan pilgrims returning from the Holy Land in the 10th century.

Rose cultivation is spread along the Oued Dadès and the Oued M'Goun, in the territory of five municipalities: Kelaat M'Gouna, Aït Sedrate Est, Aït Sedrate Ouest, Aït Ouassif and Souk El Khemis.

In this section, we analyze the transition from traditional to modern rose production and its effects on the social and economic structures of the area studied. To understand this dynamic, we rely on the results of a sample of 17 rose growers, aged 20 to 70, both men and women, interviewed using semi-structured interviews focusing on production practices and techniques. We also observed the effects of modernization on the society of the two growing regions.

The agricultural landscape is characterized by its organization along the banks of the Dadès River and its tributary, the M'Goun, forming a narrow ribbon where the generally scattered plots extend on either side of the waterway, often close to dwellings. The average plot size is approximately 400 m². Irrigation is traditionally carried out by flooding through canals that directly convey water from the two wadis, according to a collective distribution system.

These plots exhibit a wide diversity of crops: almond, fig, olive, and apricot trees, as well as cereal crops (wheat, barley) and forage crops (alfalfa). Roses are planted as hedges, structuring this mosaic of food crops. The survey reveals that private land ownership is the dominant form of land tenure, with farms being primarily family-run.

The producers interviewed agreed that, for a long time, the rosebush served only one purpose: to protect cultivated fields

from animals. Thorny rose hedges enclosing the plots protected crops such as wheat and barley. This use reflects the paramount importance of food crops for local populations and underscores the lack of direct economic value of the rose.

Producers' interest in this product increased with the rise in their income from selling roses to industrial processing units, particularly the "Saveurs du Maroc" factory. Consequently, the rose acquired a second function: production for the market.

In traditional production methods, cultivation and maintenance techniques remained simple. Planting was carried out by the farmers themselves: during annual pruning, the cut branches were replanted, without the need to purchase nursery stock. Rose cultivation was part of a mixed farming system, and despite low yields, production relied primarily on family labor.

The agricultural landscape has been transformed by the gradual specialization of entire plots of land dedicated exclusively to roses. Rose bushes are now planted in parallel rows, with the spaces between the rows often used for growing alfalfa. This evolution reflects the desire to increase production, driven by rising demand and profitability.

According to statistics from the Kelaat M'Gouna Regional Office for Agricultural Development, the area dedicated to rose cultivation reached approximately 800 hectares in 2017, equivalent to 3,250 km if all the planted rows were laid out in a straight line. By 2025, this area had reached 1,200 hectares, forming hedgerows along cultivated plots stretching over 4,200 linear kilometers. The region produces approximately 3,000 to 5,000 tons of fresh roses annually. This development is attributed to the intervention of this organization, which supports, trains, and raises awareness among farmers to increase production, particularly through the transformation of traditional rose cultivation and maintenance practices and techniques.



Figure 2: Rose harvest fields

According to our sample (17 properties), new techniques applied to rose cultivation—particularly those related to pruning—have significantly contributed to increased yields, leading the majority of farmers to adopt them with optimism. These techniques have gradually spread and replaced traditional rose maintenance practices. However, producers emphasize that farmers demonstrate flexibility in their approach to these innovations: they adopt the techniques they deem suitable for their needs while maintaining certain traditional production practices. Some, for example, combine rose cultivation as a boundary hedge with monoculture in fields.

Consequently, farmers have not focused exclusively on rose cultivation as a highly profitable agricultural activity. Other crops continue to play a vital role as food sources for households in the region. Roses thus remain a supplementary source of income for families.

Farmers who have adopted modern rose production techniques require more agricultural labor. Indeed, modernized production demands a higher level of maintenance than traditional methods, necessitating the use of external labor, the number of which varies depending on the cultivated area and the nature of the work to be performed. For example, one of the respondents, the owner of a one-hectare plot, stated that he needed 14 workers to prune his rose bushes, an operation carried out twice a season under modern production methods.

This agricultural dynamic has also led to a reorganization of crops within the plots. As one farmer interviewed stated: "I was forced to move the rose bushes from a field planted with olive trees—which were blocking the sunlight necessary for their growth—to an empty plot."

Agricultural services also encourage farmers to graft roses. However, the producers interviewed unanimously rejected this practice, reflecting their desire to preserve the local rose variety, a distinctive feature of the two regions. In contrast, this technique is used on farms belonging to the "Saveurs du Maroc" factory. Furthermore, farmers—whether they use traditional or modern methods—unanimously state that they do not use pesticides in rose cultivation.

According to 5 out of 17 respondents (30%), modern techniques are beginning to replace older methods of rose production. However, despite sustained incentives from agricultural services, 3 out of 17 farmers (18%) remain committed to their traditional practices, particularly regarding planting techniques, as purchasing nursery plants involves additional costs. In general, expenses related to rose maintenance have increased compared to the past. Rose cultivation also puts increased pressure on the organization of agricultural work, now occupying a significant place in farmers' schedules.

Nevertheless, increased economic profitability appears to be the main factor justifying the constraints linked to the transition towards the adoption of modern production techniques and practices. It also constitutes an essential condition for making this product a central driver of regional economic development.

The Social, Economic and Environmental Effects of the Transition to Modern Rose Production

The modernization of agricultural techniques and the specialization of entire plots of land in rose production are indicators of the gradual changing agricultural landscape in both basins. A coexistence of two modes of agricultural organization—traditional and modern—is now observed, contributing to the gradual emergence of roses as the dominant crop around which other crops are structured. However, although the two basins are contiguous, it remains difficult to speak of true homogeneity in rose production. Thus, the pace of the transition toward modern management of this crop seems to be determined more by natural factors than by human factors.

The abundance of water resources in the M'Goun oasis is an incentive for adopting modern rose cultivation techniques, especially since the snowmelt coincides with the flowering period. In contrast, the Dadès Valley oasis is experiencing water scarcity, particularly pronounced in recent years, which negatively impacts production quality, according to farmers. Some are considering innovating by grafting their rose bushes with another variety, *Rosa indica*, known for its greater drought resistance.

Our research on the impact of modern rose production practices and techniques on the relationships between local populations and resources shows that economic, social, and environmental contexts strongly influence agricultural production systems. The dynamics of innovation and the adoption of new production methods are closely linked to farmers' social capacity. This capacity is particularly characteristic of those who benefit from support from agricultural services, which provide them with techniques and training that primarily serve as a lever for integration into new relational networks, facilitating access to expanded marketing channels. It depends, in particular, on the level of education, the individual's ability to search for information, and social capital, as a structuring factor in social and territorial relations.

Agricultural development policy has contributed to strengthening the social capacities of certain individuals or groups, often already enjoying a relatively favorable social position, making them visible and influential in the local area. Consequently, it is possible that the policy for developing the rose sector has partially deviated from its initial objectives of combating poverty and precariousness, producing, in practice, effects of social exclusion and exacerbated inequalities in the region.

The modernization of rose production has also generated economic momentum by creating employment opportunities for various social groups in both regions. These new production methods have fostered the emergence of a developing economic fabric, both in agriculture and in processing and marketing units. This demonstrates a trend towards the expansion of the local economy as a space for activity for the population.

The adoption of modern techniques has led to an increased division and specialization of labor among the various actors in production, each developing specific skills related to their link in the production chain. Plowing now requires tractors; the use of nursery-grown seedlings—nonexistent in the traditional system—has become necessary; the demand for labor for planting increases; skilled workers are required for pruning and grafting; and finally, harvesting primarily involves a specialized, generally female, workforce, although men also participate due to increased production.

Young graduates are increasingly drawn to the trade of rose-derived products or to the use of information technologies applied to this sector, which may encourage other young people to return to their regions of origin after migrating. The dynamics of rose cultivation also involve returning migrants: for example,

a retiree returning from France uses agricultural skills acquired abroad, particularly in grafting, to increase production and better adapt to natural constraints.

The traditional rose production system is undeniably environmentally friendly. However, in the modern system, the environmental effects of rose monoculture on biodiversity remain difficult to assess, especially since crop diversity still persists in some plots. According to farmers, the absence of significant pest infestations explains why no pesticides are currently used. Nevertheless, the expansion of rose cultivation could exacerbate water scarcity, particularly in the context of climate change. The growth of monoculture could therefore generate significant constraints in the future.

In general, agriculture in both basins requires both intensification and diversification of production, as well as the adoption and learning of new techniques and skills by local populations. These transformations are necessary to ensure the diversity of agricultural resources and maintain a sustainable balance between supply and demand.¹

The players in the rose industry — strategies and challenges

In this section, we analyze the evolution of the value added to rose products at the processing and marketing stages, which follow the production phase within the supply chain. The aim here is to identify the characteristics of the actors involved, according to their categories, strategies, stakes, and the relationships they maintain with each other [1].

Our analysis is based on the results of interviews conducted with a range of stakeholders involved in the processing segment of the rose industry. This sample includes about ten stakeholders distributed as follows: an association working to improve the status of women, two women's cooperatives specializing in rose distillation, a men's cooperative, two family cooperatives, a private distillation company and, finally, two technicians from the regional agricultural advisory center.

The emergence of each category of actors involved in processing rose products is closely linked to the evolution of the very process of adding value to this resource. Historically, the populations of the Dadès and M'Goun valleys placed little economic importance on roses. At best, dried roses were sold to itinerant intermediaries who transported them to the cities in exchange for modest prices.



¹Mouhmed Ait Hamza, Socio-spatial mobility and local development in the South of the Moroccan Atlas Mountains « Dades- Todgha' El Maarif El Jadida .2015, p 134

It was the French colonists who recognized the potential economic importance of this product, leading to the establishment of several distillation units and marking the first steps in adding value to the production. Subsequently, as mentioned earlier, the company Saveurs du Maroc continued the legacy of the factory founded during the colonial era in Kelaat M'Gouna, becoming the largest rose processing plant (producing rose water and essential oil). This factory long held a near-monopoly on rose products. It was the sole buyer from farmers, relying on collectors from each village, tasked with gathering the harvest directly from the fields using mobile scales [2].

In an effort to limit this monopoly, the Errachad Cooperative was created in 1980, following a crisis in rose production. This crisis erupted when farmers, faced with the very low prices imposed by the Saveurs du Maroc factory, began uprooting their rose bushes. This crisis led to the factory's closure for two years.

In the early 2010s, the rose was integrated into national strategies through the agricultural policy of the Green Morocco Plan, which aimed to institutionalize the processing of local products in order to promote alternative development in poor and vulnerable rural areas. Numerous cooperatives emerged under the impetus of the agricultural administration, which finances the equipment necessary for rose processing and provides essential technical training.

The administrative services of the Moroccan Ministry of Agriculture consistently encourage farmers to form cooperatives and work together to benefit from government aid and support. The advantages granted to these structures have led some private companies to change their legal status to become cooperatives, thus enabling them to access financing, training, and tax exemptions.

The Moroccan Interprofessional Federation of Aromatic Roses (FIMAROSE) is the professional organization responsible for representing and defending the interests of the rose sector. It brings together producers (farmers, collectors, suppliers, and women's cooperatives) and processors (factories and artisanal distilleries). This professional organization was established to access public funding and subsidies allocated to the sector, within the framework of a contractual program signed between the federation and the Ministry of Agriculture.

Private Companies: A Traditional Player in the Rose Industry

We have already discussed the role of the private sector in the processing of rose products in the Dadès and M'Goun basins, particularly through the company Les Arômes du Maroc, which represents a continuation of the processing unit established during the colonial era. In 1998, two other companies joined this industrial network: Biolandes and ARD Guisser. These three companies constitute the main industrial units for rose processing in the two basins [3].

The private sector also includes smaller industrial units, such as Exir M'Goun, whose founder states that it was established in partnership with a French associate in 2011. For those involved in processing, the main challenge remains the supply of raw materials—roses—which form the basis of all their

production activities. Supply strategies therefore differ among the various players, particularly between industrial companies and cooperatives.

In the case of the company Exir M'Goun, its founder relies on relationships of trust and prior knowledge with farmers to secure the supply of roses. He also ensures that they do not use pesticides or chemical fertilizers in their cultivation, which leads him to offer attractive prices to guarantee the quantities necessary for the production of rose water and, to a lesser extent, essential oil. He personally transported these products by car to sell them in France, emphasizing that exporting requires obtaining quality certifications, which are particularly costly for processors.

The company Exir M'Goun participates annually in the Rose Festival, which its founder considers an essential platform for meeting clients and establishing business relationships. He also emphasizes the increasing prevalence of counterfeit or substandard products on the market. Therefore, the establishment of quality labels for products sold, both in cooperatives and in markets, appears crucial to enable consumers to distinguish authentic, high-quality products from lower-value processed goods [4].

The Structures of the Ministry Of Agriculture And The Challenge of Ending the Monopoly

Given the increasing importance the State places on rose products, and with the aim of reorganizing the sector by improving its profitability and enhancing its value as a local product specific to the two basins, an institutional reorganization has been implemented. Supervision of the rose sector has thus been transferred from the Regional Office for Agricultural Development of Ouarzazate to the National Office for Agricultural Advisory Services, whose local headquarters are located in Kelaat M'Gouna.

This organization supports farmers in the areas of management, training, and dissemination of best technical practices in rose cultivation, with the aim of increasing production volumes. It also focuses on strengthening the entire sector through the creation and support of agricultural cooperatives, both women's and men's.

Technicians from the Moroccan Ministry of Agriculture are now responsible for providing direct technical support to farmers. As one of the technicians interviewed pointed out: “Previously, setting up a cooperative required a preliminary technical and economic study, which was included in the incorporation documents. Today, no such study is required: anyone can create a cooperative, and there are no specific controls in place.”

Cooperatives : Between Family Solidarity And Individual Initiatives

Community action preceded the formation of cooperatives in the Dadès basin. As early as 2003, the women of the Souk El Khemis Dadès Association were working to improve the status of women in the region, bringing together approximately 500 members. At the beginning of 2011, some of them decided to create agricultural cooperatives specializing in rose production, notably the Women of Dadès Cooperative and the Titimatine Cooperative [5].

The leaders of these two cooperatives we met share similar characteristics. The president of the Titimatine cooperative explains the creation of this structure as follows: “We founded this cooperative to increase our income and benefit from public funding; through our activities, we also seek to improve the condition of women in our society.”

These cooperatives source their raw material—roses—from the production of their members, which covers approximately 30% of their needs. The remainder is acquired through collectors at a price between 15 and 20 dirhams per kilogram, higher than the market price, in order to encourage farmers and secure their supply. They primarily produce distilled rose water, essential oil, and dried rosebuds [6].

The Titimatine cooperative holds a quality label issued by the National Office for Food Safety (ONSSA) and participates annually in the International Agricultural Show in Morocco (SIAM) held in Meknes. In contrast, the Femmes du Dadès cooperative, despite holding several quality certifications for its products, has never been selected to participate in this national event, as participation is contingent upon significant market visibility.



Figure 3 : Some common tools for distilling roses from Dadès and M'Goun

Family Cooperatives: Private Businesses Disguised As A Solidarity Economy

The logic of state support and benefits granted to cooperatives has encouraged many private companies to change their legal status and transform into cooperatives. This is the case of a family that owned a rose distillery in 2009 and converted its operations into a cooperative structure in 2011.

The Soufi family cooperative comprises 17 members, both men and women. It relies on its own rose farms, covering an area of 12 hectares, which allows it to be self-sufficient in raw materials, producing approximately 40 tons of roses. The cooperative also employs a female workforce for the harvest, mobilizing nearly 70 women who are paid three dirhams per kilogram picked [7].

The Soufi cooperative has a local sales outlet for its products, while internationally, exports are facilitated by the quality labels its products hold, which cost approximately 15,000 dirhams to obtain. It participates annually in the International Agricultural Show in Morocco (SIAM), but does not take part in the Rose Festival held in Kelaat M'Gouna, believing that its products face competition from industrial rose-based products, often of chemical origin.



A similar situation can be observed with the Woul Cooperative, formerly known as Florose, which markets its products abroad with the support of migrants living in Europe. Family cooperatives are essentially based on relationships of trust between family members and between them and consumers. Each member assumes a specific role contributing to the development of the collective activity.

In summary, the analysis highlights the crucial role of the State in the emergence of new players in the rose industry and in reducing the monopoly previously held by private companies over raw material prices. Today, thanks to competition from cooperatives, the price of a kilogram of roses has reached approximately 20 dirhams.

However, the promotion of the cooperative model through public policy has also led some private actors to exploit the advantages associated with the social and solidarity economy—initially intended for socially vulnerable groups. Yet, the reality of the sector shows that it requires the joint involvement of the private and social sectors.

Regarding women's cooperatives, despite the public support they receive, the situation of women remains precarious, as these structures do not always guarantee stable incomes capable of lifting them out of poverty in the long term. In some cases, their vulnerability can even increase due to internal organizational constraints and power dynamics within the cooperatives.

Furthermore, the inadequate monitoring of support and training programs—particularly downstream in the supply chain, i.e., at the marketing level—leaves stakeholders to operate according to their own strategies, in a context where competitive conditions are not necessarily fair. The existence of family cooperatives operating on a model similar to that of private companies illustrates the need to rethink the principles and values that underpin rose cooperatives.

The cooperatives interviewed emphasize that possessing quality labels is not, in itself, a determining factor, as these can be obtained through financial resources. Ultimately, it is primarily economic and social capital that continue to differentiate the actors. This situation highlights the absence of a genuine social strategy capable of ensuring a competitive balance in a sector whose initial aim was to combat poverty and precariousness in a region long marked by exclusion and marginalization.

Conclusions

The shift from traditional to modern management of rose production has generated a dynamic territorial dynamic in the M'Goun and Dadès river basins. This dynamic would not have emerged without the government's initiative through the agricultural policy of the Green Morocco Plan. The second pillar of this program aims to create employment and improve the incomes of rural households, particularly by promoting certain local products through mechanisms such as the Protected Designation of Origin (PDO), which has benefited the rose.

In this context, the State has mobilized material and institutional resources to train and support rose producers, while also facilitating the creation of cooperatives and professional organizations representing the sector. All of these measures and interventions underscore the need for public support to drive change in the marginalized territories of Dadès and M'Goun. Our study shows that producers have adopted modern techniques compatible with their resources and financial capabilities, as well as their work constraints, even though food crops remain a priority in their production systems.

Within this sector, women's role remains largely limited to rose harvesting. Despite the existence of women's cooperatives, these have not succeeded in ensuring genuine economic and social autonomy for their members. Nevertheless, the cooperatives have generally contributed to reducing the dominance of private companies over the product.

For private actors, specializing in rose monoculture represents a strategic supply opportunity and a prospect of long-term self-sufficiency, reducing their dependence on producers. However, this trend could lead to overproduction and a devaluation of the product, as cooperatives lack the capacity to absorb large volumes.

Our study also concludes that the interventions of the Ministry of Agriculture have not been sufficient to make the rose a genuine driver of integrated development in the region. This limitation stems largely from the implementation methods of the Green Morocco Plan. The multiplicity of actors—private companies, producer cooperatives, and processing units—has generated divisions, conflicts of interest, and a lack of convergence between their strategies.

If a territorial approach is meant to be the foundation of local development, then the rose, as a territorial resource, should be managed according to the principles of local governance. This implies that local stakeholders reconcile their individual interests with the rational management of the resource, within the framework of a territorial project aimed at the development of all the municipalities in the rose-growing region. Therefore, the question arises as to the role of elected officials in promoting rose products and integrating them into action programs that can be linked to production chains generating integrated and sustainable territorial development for both basins.

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