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Report Highlights:

The 2025 crop season in Morocco has benefited significantly from abundant rainfall, particularly during the winter months from January through March, leading to a strong recovery after several years of droughts. Post forecasts for MY 2026/27 production at 4.2 MMT for common wheat, 2.3 MMT for durum wheat, and 1.5 MMT for barley. The anticipated strong domestic production is expected to reduce import demand, with wheat imports projected to be 5 MMT and barley imports at 0.5 MMT.

Executive Summary:

MY 2026/27

USDA field assessments in March 2025 indicated regional variation in crop development, with southern areas more advanced than northern regions where January snowfall and cold temperatures delayed germination. Despite these regional differences, overall conditions remain favorable and farmers report satisfaction with progress. For MY 2026/27, Post projects production of 4.2 MMT common wheat, 2.3 MMT durum wheat, and 1.5 MMT barley a substantial year-over-year recovery driven by improved weather conditions.

Post forecasts for MY 2026/27 wheat imports at 5 MMT, representing a 28 percent decrease from MY 2025/26 due to anticipated improved domestic production. Industry sources indicated that French imports would double, driven by strong production and competitive pricing. In contrast, Russian imports are expected to decline due to logistical challenges and higher insurance and freight costs.

During the USDA field trip, large numbers of sheep and goats were observed grazing, reflecting improved pasture and grassland conditions, which could help reduce feed demand, including for barley. Post projects MY 2026/27 barley imports at 500,000 MT, down 44 percent year-over-year due to improved pasture availability and expected good production.

In MY 2026/27, the Moroccan government maintains its policy of exempting (0% tariff) common wheat imports of duties to guarantee ample supply and stabilize prices in the domestic market. As a result, the preferential tariff granted under the U.S.-Morocco Free Trade Agreement (FTA) does not provide a competitive advantage to U.S. wheat exports, given the current zero-duty regime applied to all origins

Heavy winter rains flooded parts of northern Morocco's grain growing region. In March 2026, the Government of Morocco announced a recovery plan in response to the flooding in the Gharb and Loukkos regions. The plan explicitly includes support for spring crops, including rice, through subsidized seeds and fertilizers, as well as rehabilitation of irrigation and drainage infrastructure. A package totaling $33 million USD was allocated for affected farms in the two regions.

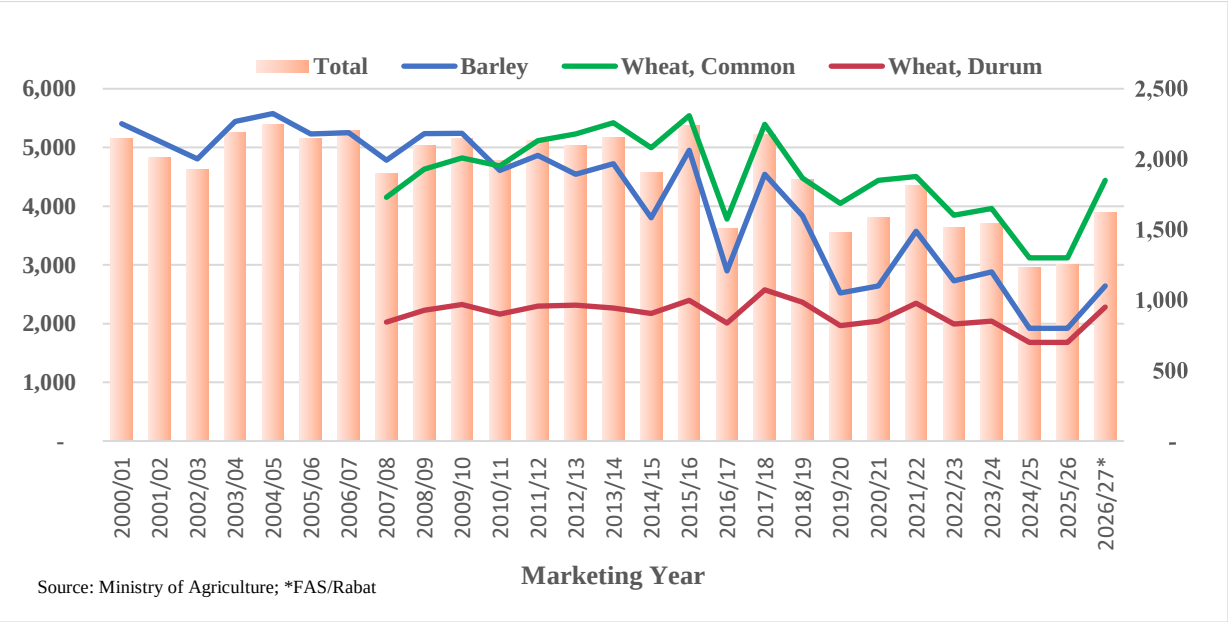
The Government of Morocco continues to support common wheat imports based on a fixed flat rate premium. This measure is valid until April 30, 2026, and is intended to maintain low bread prices and encourage stock building (link).

Commodities: Wheat and Barley

Area

The 2025 crop season started late due to insufficient and irregular early rainfall, which delayed sowing and created uncertainty among farmers, some fields were not planted until early January 2026. Weather conditions improved significantly from late December through March, allowing planted area to recover. Industry contacts have indicated that the area sown this season is expected to be about 30 percent above last year's levels due to improved weather. However, this remains 40 percent below the 20-year average. The MY 2026/27 total area harvested to common wheat and durum wheat is projected at 2.8 million hectares while barley is estimated at 1.1 million hectares.

Figure 1: Moroccan Harvested Area (1,000 MT)



Production

Following delayed seeding in late 2025/early 2026, wheat and barley production in Morocco progressed under favorable weather conditions with sufficient rainfalls throughout most of the growing season. According to the latest official figures presented in March 2026, Morocco recorded about 462 mm of cumulative rainfall between September 1, 2025, and March 11, 2026, which is 56 percent above the 30-year average and 134 percent higher than the same period a year earlier. These rainfall levels have significantly improved crop and pasture conditions across the country.

USDA field visits in March 2026 confirmed that crop development is more advanced in the southern areas than in the north, where snowfall and cold temperatures in January slowed germination; however, overall conditions remain favorable and farmers are satisfied with the season's progress. Despite this positive outlook, farmers faced important challenges during the production season. This included high production costs, especially for fertilizers and other inputs

due to continuing pressure from volatile international fertilizer markets, especially for nitrogen fertilizers. It also included temporary logistics problems in getting some fertilizer shipments into Moroccan ports because of bad weather, and some wheat fields were affected by flooding in parts of the Gharb and Loukkos region.

Morocco's 2026 growing season is performing well above normal. After starting near the historical average in autumn, NDVI increased sharply from January onward and reached exceptional levels in March and early April, exceeding the historical range. This confirms stronger vegetation and crop development than in the previous three years. For MY 2026/27, Post projects production of 4.2 MMT for common wheat, 2.3 MMT for durum wheat, and 1.5 MMT for barley. These figures reflect a substantial recovery from last year attributable to improved weather conditions.

Figure 2: Morocco Crop Conditions-MODIS Normalized Difference Vegetation Index (NDVI)

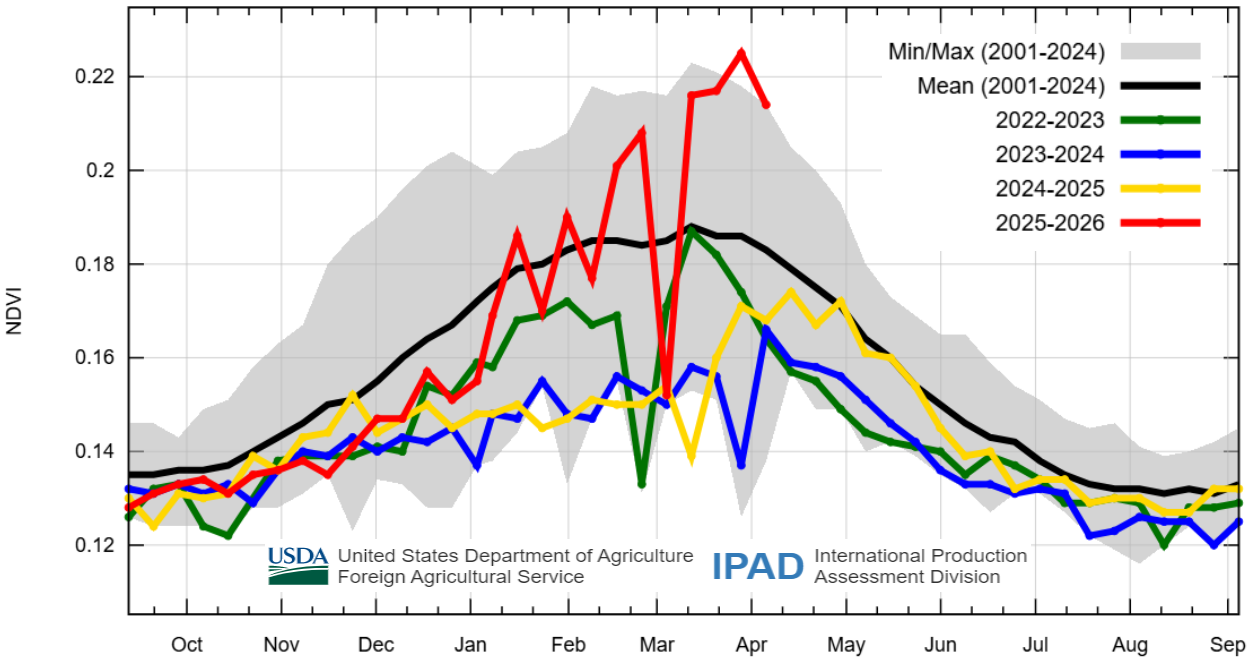
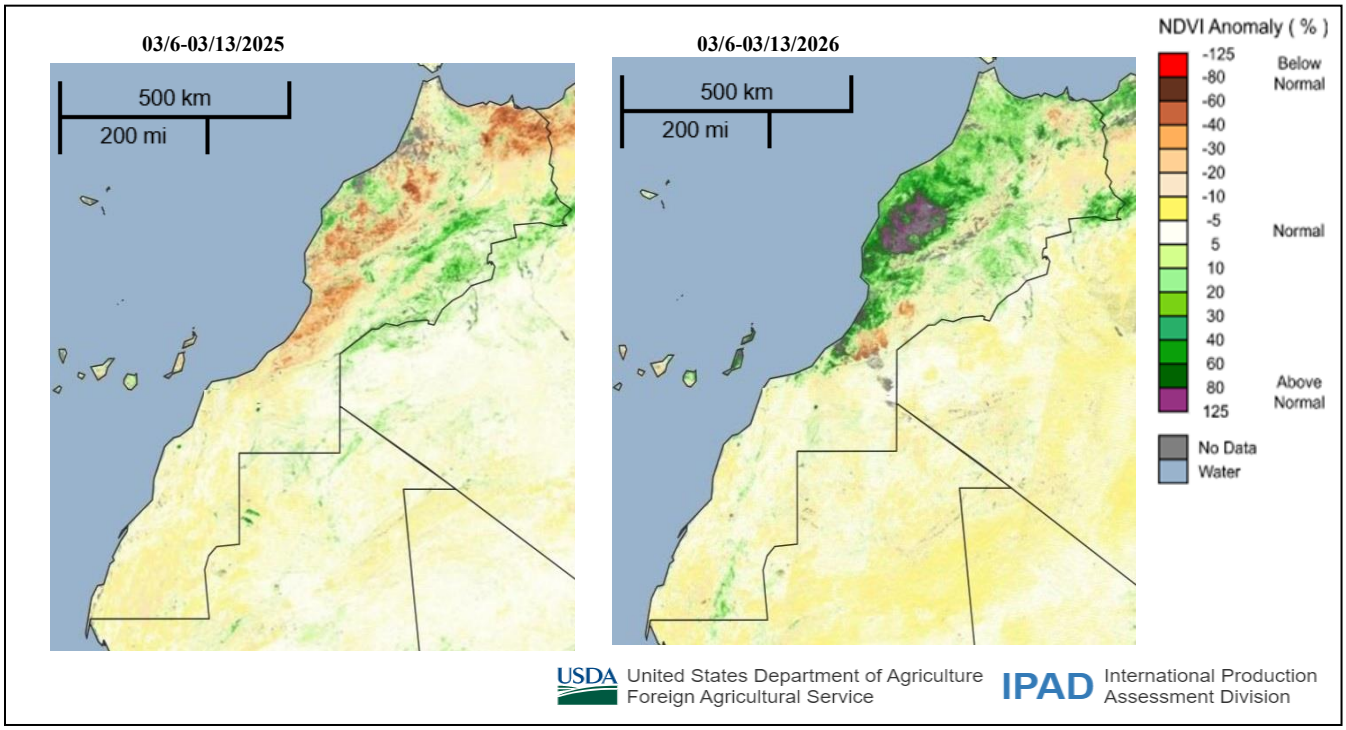


Figure 3: Morocco – WMO Monthly Precipitation, October- August

The Moroccan vegetative index comparison shows a clear improvement in crop conditions during the current growing season relative to the same period last year. In particular, northern parts of the country display a strong recovery, with vegetation conditions shifting from mostly below normal in MY 2025/26 to largely above normal in MY 2026/27 which reflects a better season for crop development in the main wheat and barley producing areas.

Figure 3: Moroccan Vegetative Index Comparison MY 2026/27 and MY 2025/26



Consumption

Wheat

Bread is an important staple in the Moroccan diet and is served with most meals. Post expects total domestic consumption in MY 2026/27 to slightly increase to 10.1 MMT reflecting the average population growth trend of approximately one percent. Common wheat represents nearly 70% of the consumption in urban areas and 66% in rural areas.

Barley

Barley is consumed mostly as animal feed and consumption rates vary depending on local availability and pasture conditions. USDA's crop travel survey indicates that rangeland conditions for Moroccan sheep and goats are well above average in MY 2026/27, which is expected to reduce barley demand during the same marketing year. For MY 2026/27, Post forecasts barley total consumption at 1.9 MMT.

Prices

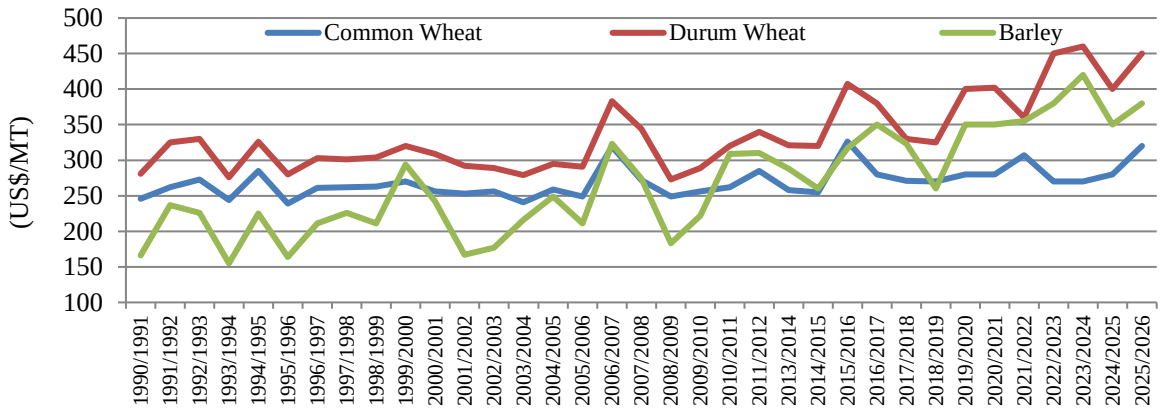
Moroccan wheat, flour, and bread prices are politically sensitive and are strictly managed.

- Morocco's National Inter-Professional Office for Cereals and Legumes (ONICL) varies MFN tariff rates throughout the year in order to control Moroccan common wheat prices.

ONICL aims to maintain bread wheat prices between $260/MT and $280/MT. This marketing season is set at $280/MT

- ONICL subsidizes common wheat flour, known as "National Flour," to support low-income consumers and maintain the price of domestic flour at an affordable level. In the MY 2026/27, the quota was set at 630,000 MT.

Figure 4: Moroccan Average Local Prices for Wheat and Barley



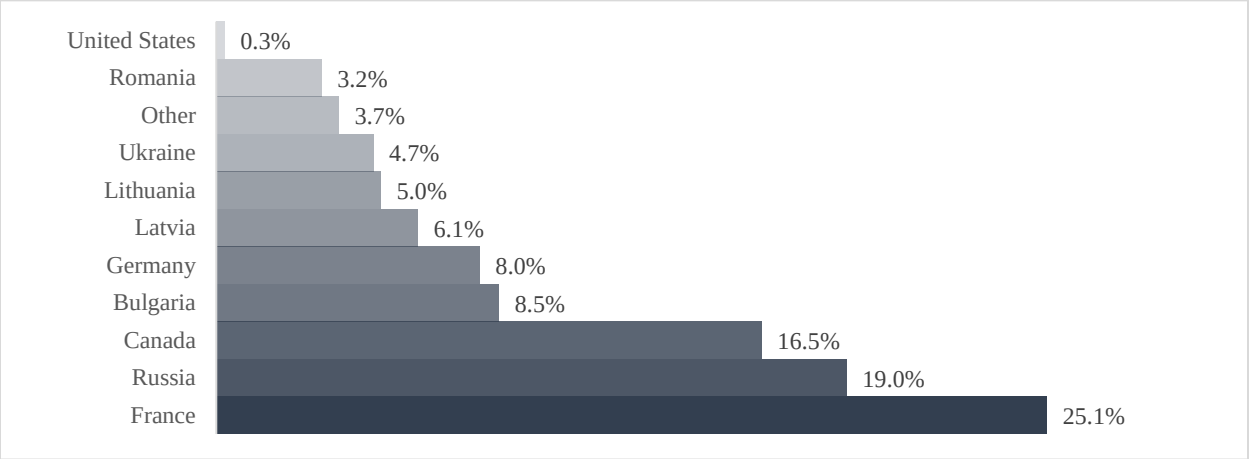
Source: Ministry of Agriculture (Exchange rate of 4/15/2024: 1 US$ = 10.14 dirham) * Latest available data (March 20, 2025).

Trade

Wheat

Post forecasts for MY 2026/27 wheat imports at 5 MMT, representing a 28 percent decrease from MY 2025/26 due to anticipated improved domestic production. Morocco continues to diversify its wheat import sources. Traditionally reliant on France, the country has expanded its suppliers to include Germany, Canada, Russia, Bulgaria, and Romania. In MY 2026/27, sources project that French imports will double, driven by strong production and competitive pricing. In contrast, Russian imports are expected to decline due to logistical challenges and higher insurance and freight costs.

Figure 5: Morocco Wheat Imports by Origin (%) in MY 2025/26



Source: Trade Data Monitor, Moroccan Office des Changes

Table 1: Wheat Imports by Origin (MT Wheat Equivalent)

Partner Country	Marketing Year					Year to Date		
	2020/21	2021/22	2022/23	2023/24	2024/25	06/24-01/25	06/25-01/26	%Δ
France	1,083,612	1,291,719	3,175,958	2,566,166	1,573,854	882,027	2,297,801	161%
Russia	205,675	29,830	0	503,440	1,194,512	960,137	385,146	-60%
Canada	1,290,992	539,608	1,068,583	839,246	1,033,716	689,158	804,644	17%
Bulgaria	103,649	27,208	4,722	98,649	535,650	352,669	0	-100%
Germany	113,927	33,057	977,389	850,495	499,161	194,085	113,628	-41%
Latvia	187,518	21,200	93,249	30,337	381,966	152,771	82,720	-46%
Lithuania	117,772	6,320	192,428	189,390	311,888	75,362	63,000	-16%
Ukraine	1,101,408	596,634	14,801	174,062	232,414	232,414	28,800	-88%
Romania	69,460	28	184,608	329,906	199,543	168,628	74,343	-56%
Argentina	390,629	941,770	85,870	0	97,987	0	201,840	0%
Other	779,541	583,357	442,851	424,158	215,497	124,419	145,641	17%
Total	**5,444,178**	**4,070,732**	**6,240,459**	**6,005,850**	**6,276,187**	**3,831,673**	**4,197,563**	**10%**

Source: Morocco office de change, applied converting factor: 1.368, MY used for wheat June-May

Table 2: Wheat Imports by Marketing Year (MT Wheat Equivalent)

HS Code	Description	Marketing Year			Year to Date		
		2022/23	2023/24	2024/25	06/24-01/25	06/25-01/26	%Δ
1001	Wheat and meslin	6,225,815	5,988,882	6,265,208	3,824,689	4,190,900	9.57
190219	Pasta uncooked	10,940	14,255	8,827	5,600	5,307	-5.23
190230	Pasta, prepared, nesoi	3,125	2,228	1,279	776	774	-0.26
1101	Wheat or meslin flour	420	292	488	267	344	28.84
190240	Couscous	7	74	276	251	154	-38.65
190430	Bulgur wheat	152	119	108	89	85	-4.49
Total	**Psd-wheat**	**6,240,459**	**6,005,850**	**6,276,187**	**3,831,673**	**4,197,563**	**9.55**

Source: Morocco office de change, applied converting factor: 1.368, MY used for wheat June-May

Morocco mainly exports processed wheat products (Pasta and Couscous). Exports are the result of excess milling capacity and Morocco's relative competitiveness in the Mediterranean region and Africa. Exports primarily target EU and African countries.

Table 3: Wheat Exports by Marketing Year (MT Wheat Equivalent)

HS	Description	Marketing Year			Year to Date		
		2022/23	2023/24	2024/25	01/25-01/25	01/26-01/26	%Δ
190240	Couscous	63,323	68,442	68,817	5,026	3,894	-22.52
190219	Pasta uncooked	42,186	59,354	60,328	4,161	5,788	39.1
190230	Pasta, prepared, nesoi	6,748	4,693	3,773	568	477	-16.02
1101	Wheat or meslin flour	1,892	8,365	3,151	622	222	-64.31
190430	Bulgur wheat, pre-cooked	3	3	2	0	0	0
1001	wheat and meslin	0	59	0	0	0	0
Total	**Psd-Wheat**	**114,152**	**140,914**	**136,070**	**10,377**	**10,381**	**0.04**

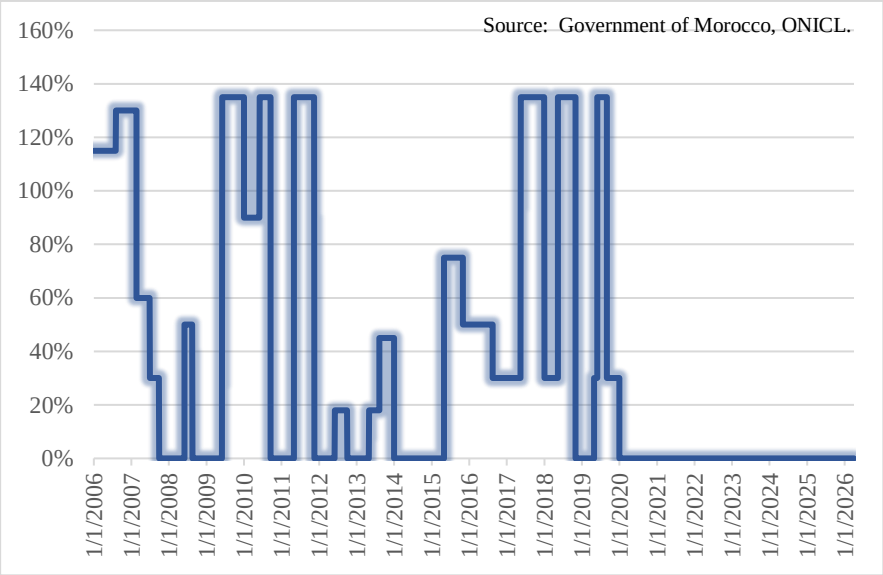
Source: Morocco office de change, applied converting factor: 1.368, MY used for wheat June-May

Wheat Imports duties

Morocco uses import duties to provide protection to local grain producers during their marketing season, to regulate prices, and to manage stocks.

In MY 2026/27, the Moroccan government maintain its policy of exempting (0% tariff) common wheat imports of duties to guarantee ample supply and stabilize prices in the domestic market. As a result, the preferential tariff granted under the U.S.-Morocco Free Trade Agreement (FTA) does not provide a competitive advantage to U.S. Wheat exports, given the current zero-duty regime applied to all origins.

Figure 6: Morocco MFN Tariff on Common Wheat Imports



Barley

Morocco's barley imports are heavily influenced by the size of the national livestock herd and prevailing climatic conditions. Following the cancellation of Eid Al-Adha last year after consecutive drought seasons, sources this year indicate that no cancellation is expected due to improved conditions and the rebuilding of livestock stocks. During the USDA field trip, large numbers of sheep and goats were observed grazing, reflecting improved pasture and grassland conditions, which could help reduce feed demand, including for barley. Post projects MY 2026/27 barley imports at 500,000 MT, down 44 percent year-over-year due to improved pasture availability and expected good production.

Table 4: Barley Imports by Origin in MY 2025/26

Partner Country	Marketing Year				Year to Date		
	2021/22	2022/23	2023/24	2024/25	07/24-01/25	07/25-01/26	%Δ
France	416,485	13,888	84,478	413,279	141,544	189,970	34%
Romania	6,350	12,531	339,878	129,303	129,303	15,604	-88%
Lithuania	22,003	20,496	61,262	84,340	33,191	30,971	-7%
Germany	238,837	287,276	446,082	69,031	69,031	79,177	15%
Bulgaria	0	0	179,704	62,583	62,583	0	-100%
Ukraine	50,238	0	28,337	32,650	32,650	0	-100%
Hungary	0	11,018	66,797	8,213	8,213	0	-100%
Estonia	25,494	0	32,998	25,854	25,854	0	-100%
Other	216,970	1,235	293,541	43,214	5,814	11,242	93%
Total	**976,378**	**346,445**	**1,533,078**	**868,468**	**508,183**	**326,963**	-36%

Source: Morocco office de change, MY used for wheat July-June

Stocks

Although official statistics on wheat and barley stocks are not publicly available, industry contacts indicated that as of April 1, 2026, Morocco has a wheat supply that can last for three months of industrial milling needs. However, since mid-December 2025, importers have faced significant difficulties unloading wheat shipments at Casablanca and Jorf Lasfar Ports due to bad weather, including strong winds and rains that disrupted docking the vessels and cargo handling. These disruptions, compounded by port congestion and reduced quay capacity, led to long vessel waiting times, high demurrage costs, and tighter grain flows for some operators.

Policy

The Government of Morocco continues to support common wheat imports based on a fixed flat rate premium. This measure is valid until April 30, 2026, and is intended to maintain low bread prices and encourage stock building (link).

On April 2, 2026, the Moroccan Confederation of Agriculture and Rural Development (COMADER) hosted a conference bringing together Moroccan public and private stakeholders to discuss the cereal sector, particularly wheat, which remains critical to food security yet structurally exposed to climate variability, rising input costs, and global market volatility. Discussions focused on boosting domestic production to reduce reliance on imports, enhancing farmer profitability through improved seeds and technology adoption, and modernizing the value chain particularly storage, collection, and logistics. The event concluded with the signing of an MOU between the government, traders, and millers' federations to better use of the domestic common wheat production, while maintaining a balanced approach to imports to ensure supply and price stability.

Table 5: PSD for Wheat

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2200	2200	2200	2200	0	2800
Beginning Stocks (1000 MT)	1475	1475	673	673	0	1073
Production (1000 MT)	2460	2460	3500	3500	0	6500
MY Imports (1000 MT)	6276	6276	7000	7000	0	5000
TY Imports (1000 MT)	6328	6328	7000	7000	0	5000
Total Supply (1000 MT)	10211	10211	11173	11173	0	12573
MY Exports (1000 MT)	138	138	100	100	0	120
TY Exports (1000 MT)	139	139	100	100	0	120
Feed and Residual (1000 MT)	200	200	200	200	0	200
FSI Consumption (1000 MT)	9200	9200	9800	9800	0	9900
Total Consumption (1000 MT)	9400	9400	10000	10000	0	10100
Ending Stocks (1000 MT)	673	673	1073	1073	0	2353
Total Distribution (1000 MT)	10211	10211	11173	11173	0	12573
Yield (MT/HA)	1.1182	1.1182	1.5909	1.5909	0	2.3214
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Wheat begins in July for all countries. TY 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 6: PSD for Barley

Barley	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	800	800	800	800	0	1100
Beginning Stocks (1000 MT)	598	598	126	126	0	176
Production (1000 MT)	660	660	950	950	0	1500
MY Imports (1000 MT)	868	868	900	900	0	500
TY Imports (1000 MT)	661	661	700	700	0	500
Total Supply (1000 MT)	2126	2126	1976	1976	0	2176
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	1200	1200	1000	1000	0	1100
FSI Consumption (1000 MT)	800	800	800	800	0	800
Total Consumption (1000 MT)	2000	2000	1800	1800	0	1900
Ending Stocks (1000 MT)	126	126	176	176	0	276
Total Distribution (1000 MT)	2126	2126	1976	1976	0	2176
Yield (MT/HA)	0.825	0.825	1.1875	1.1875	0	1.3636
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Barley begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						

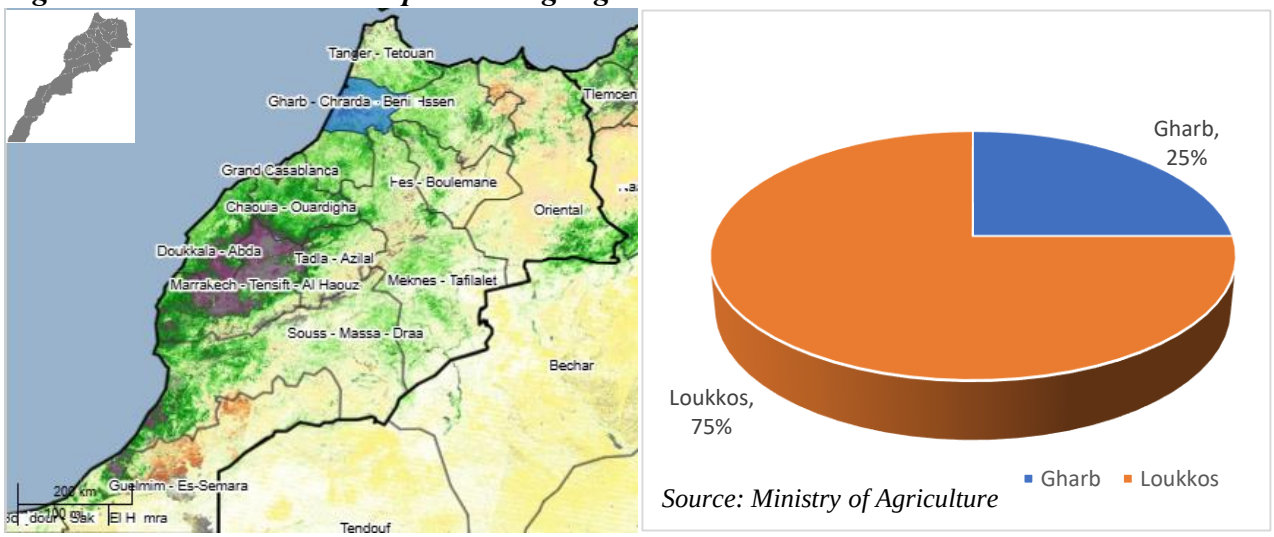
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Commodities: Rice, Milled

Production

The Gharb and Loukkos basins, Morocco's two principal rice production regions, experienced heavy rainfall in February 2026 that triggered significant flooding across an estimated 100,000 hectares. The flooding damaged autumn/winter crops and agricultural infrastructure. However, as rice is a spring/summer crop planted after the main rainy season, the floods primarily affected earlier plantings and infrastructure rather than the rice cultivation areas. For MY 2026/27, industry projections indicate that planted area will reach 9,000 hectares, with production anticipated at 55,000 MT, representing approximately a 15 percent increase over the previous year, attributable to favorable weather conditions during the planting period.

Figure 7: Rice Production Map- Area Highlighted in Blue



Source: Ministry of Agriculture

Consumption

Rice consumption in Morocco remains modest and relatively stable. Unlike wheat or couscous, rice is not a dietary staple in Moroccan cuisine. For MY 2026/27, Post projects total domestic consumption at 200,000 MT, approximately 1 percent above the previous year's level. This marginal increase is attributed to continued expansion of the hotel, restaurant, and institutional (HRI) sector, particularly Asian dining establishments, and sustained growth in tourism arrivals.

Trade

Morocco's rice imports have nearly doubled over the past seven years due to drought, reflecting increased reliance on external supply. India remains the primary supplier, followed by Egypt, with Thailand, Pakistan, and smaller exporters providing additional volumes. Early MY 2025/26 data show imports up 48 percent, driven by higher shipments from Pakistan and Uruguay. However,

improved domestic production from favorable rainfall in the Gharb and Loukkos regions is expected to partially offset import requirements. Post forecasts for MY 2026/27 imports at 145,000 MT.

Table 7: Rice Imports by Origin in MY 2025/26

Partner Country	Marketing Year				Year to Date		
	2021/22	2022/23	2023/24	2024/25	10/24-01/25	10/25-01/26	%Δ
India	30,163	51,753	46,016	75,780	16,156	21,016	30%
Egypt	0	0	14,574	35,374	12,243	15,581	27%
Thailand	19,872	8,656	6,699	11,070	2,371	6,923	192%
Pakistan	7,475	1,114	2,381	2,969	174	1,169	572%
Portugal	1,884	1,907	3,358	1,488	664	411	-38%
Uruguay	3	0	4	1,360	35	1,751	4903%
Italy	1,309	1,138	3,648	1,008	240	83	-65%
Spain	1,192	4,679	1,275	903	284	42	-85%
United States	2,832	572	1,568	414	153	308	101%
Other	1,960	4,141	9,276	740	314	922	194%
Total	**66,688**	**73,960**	**88,800**	**131,107**	**32,635**	**48,205**	**48%**

Table 8: Imports by Marketing Year (MT) Conversion to Milled Eq.

HS	Description	Marketing Year			Year to Date		
		2022/23	2023/24	2024/25	10/24-01/25	10/25-01/26	%Δ
100630	Rice, semi-milled or wholly milled	72,516	86,293	109,047	32,196	43,734	35.84
100620	Rice, husked (brown)	54	294	20,877	26	4,255	16,265.38
100640	Rice, broken	527	1,609	809	412	216	-47.57
100610	Rice in the husk (paddy or rough)	863	604	374	1	0	-100
Total	**PSD-Rice, milled**	**73,960**	**88,800**	**131,107**	**32,635**	**48,205**	**47.71**

Source: Morocco office de change, MY used for Rice October-September

Policy

In March 2026, the Government of Morocco announced a recovery plan in response to the flooding in the Gharb and Loukkos regions. The plan explicitly includes support for spring crops, including rice, through subsidized seeds and fertilizers, as well as rehabilitation of irrigation and drainage infrastructure. A package totaling $33 million USD was allocated for affected farms in the two regions.

Table 9: Production, Supply, and Distribution

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	7	7	9	9	0	9
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Milled Production (1000 MT)	36	36	48	48	0	55
Rough Production (1000 MT)	55	55	74	74	0	85
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	0	6500
MY Imports (1000 MT)	131	131	150	150	0	145
TY Imports (1000 MT)	142	142	150	150	0	145
Total Supply (1000 MT)	167	167	198	198	0	200
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	167	167	198	198	0	200
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	167	167	198	198	0	200
Yield (Rough) (MT/HA)	7.8571	7.8571	8.2222	8.2222	0	9.4444

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2026/2027 = January 2027 - December 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Attachments:

No Attachments