

Required Report: Required - Public Distribution

Date: July 03, 2024

Report Number: MO2024-0009

Report Name: Grain and Feed Update

Country: Morocco

Post: Rabat

Report Category: Grain and Feed

Prepared By: Mohamed Fardaoussi

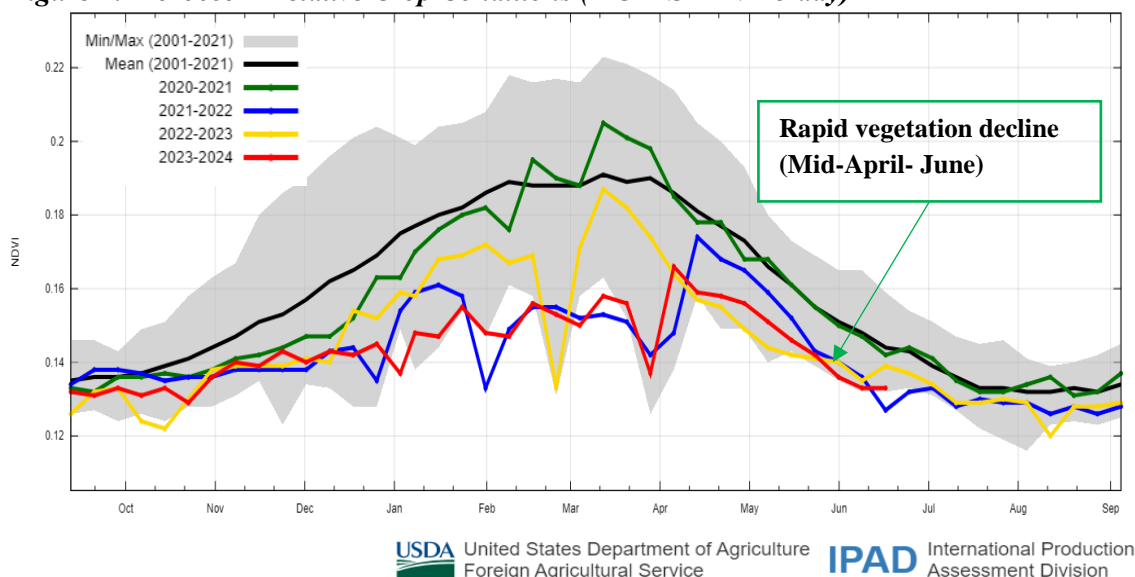
Approved By: Benjamin Rau

Report Highlights:

Morocco is facing low wheat production in marketing year 2024/25 due to drought. The Ministry of Agriculture forecasts total wheat and barley production at 3.12 million metric tons, about 43 percent down from the previous year's crop. In response to low production and rising wheat prices globally, the government of Morocco continues to support bread wheat imports based on a fixed flat-rate payment through June 30, 2024.

Production update: Morocco’s 2024/25 wheat and barley marketing year experienced inadequate rainfall and weak weather conditions during the growing season (January – April), resulting in a very poor vegetation index. Morocco farmers began harvesting earlier, near the end of April 2024.

Figure 1: Morocco – Relative Crop Conditions (MODIS NDVI 8-day)



USDA United States Department of Agriculture Foreign Agricultural Service IPAD International Production Assessment Division

On May 24, 2024, the Ministry of Agriculture announced its first harvest estimate for MY 2024/25 wheat and barley production, which is closely aligned with USDA’s April forecast – set at 3.12 MMT, down 43 percent from the previous year’s crop. The harvest includes 1.75 MMT of common wheat, 0.71 MMT of durum wheat, and 0.66 MMT of barley. The Ministry of Agriculture will publish its final production estimate in late July-early August 2024. Post revised its production estimate for MY 2024/25 for wheat and barley based on Ministry of Agriculture estimate.

Trade Update: No change.

Table 1: Morocco – Wheat Imports by Country (MT Wheat Equivalent)

Partner Country	Marketing Year				Year to Date		
	2019/20	2020/21	2021/22	2022/23	06/22-04/23	06/23-04/24	%Δ
EU 27	2,631,974	2,353,907	1,593,372	5,001,668	4,518,982	4,234,402	-6.3
Canada	927,924	1,290,992	539,608	1,068,583	816,111	731,055	-10.42
Argentina	27,050	390,629	941,770	85,870	85,870	0	-100
United States	32,200	103	1	31,902	31,902	28,793	-9.75
Ukraine	631,303	1,101,408	596,634	14,801	11,240	158,841	1313.18
Russia	364,276	205,675	29,830	0	0	375,974	0
Other	11,286	101,467	369,516	37,636	12,751	44,134	2.46
Total	4,626,017	5,444,178	4,070,732	6,240,459	5,476,856	5,573,201	1.76

Source: Office des changes

Table 2: Morocco – Wheat Exports by Marketing Year (MT Wheat Equivalent)

HS	Description	Marketing Year			Year to Date		
		2020/21	2021/22	2022/23	06/22-04/23	06/23-04/24	%Δ
190240	couscous	55,816	54,283	52,882	46,786	59,406	26.97
190219	pasta (spaghetti, macaroni, etc.), uncooked	13,069	20,373	30,214	26,682	43,812	64.2
190230	pasta, prepared, nesoi	5,670	7,444	8,042	7,659	5,779	-24.55
1101	wheat or meslin flour	1,956	1,263	1,781	1,759	4,223	140.08
1001	wheat and meslin	58	0	120	120	59	-50.83
190430	bulgur wheat, pre-cooked	0	3	3	3	1	-66.67
Total	PSD-wheat	76,570	83,366	93,042	83,010	113,279	36.46

Source: Office des changes, applied converting factor: 1.368, MY used for wheat June-May

Table 3: Barley Imports by Marketing Year (MT)

Partner Country	Marketing Year				Year to Date		
	2019/20	2020/21	2021/22	2022/23	07/22-04/23	07/23-04/24	%Δ
EU 27	943,971	440,994	786,171	346,445	203,121	1,127,623	455.15
Argentina	0	0	90,600	0	0	0	0
Moldova	0	0	0	0	0	13,298	0
Russia	0	25,041	49,369	0	0	206,494	0
Syria	0	3,337	0	0	0	0	0
Ukraine	131,649	12,099	50,238	0	0	28,337	0
Total	1,075,620	481,472	976,378	346,445	203,121	1,375,753	577.31

Source: Office des changes, MY used for barley July-June

Policy update:

On May 3, 2024, the Minister of Agriculture released a [circular](#) outlining a series of measures to support the marketing of the domestic wheat crop in MY2024/25. The measures are effective June 1 through July 31, 2024, and include:

- Maintaining the reference price (minimum price paid to producers) for common wheat at 2,780 Dh/MT (≈\$280/MT).
- A biweekly storage premium of 25 Dh/MT (≈\$2.52/MT) for grain traders and Moroccan agricultural cooperatives to store their wheat at facilities licensed by the Moroccan Cereals Office (ONICL) and has the health authorization from the Food Safety Authority (ONSSA).

The Government of Morocco continues to support common wheat imports based on a fixed flat-rate "payment" in response to strong global wheat prices. The current subsidy measures are valid until June 30, 2024. ([link](#))

Table 4: Wheat- Production, Supply, and Distribution

Wheat	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jun 2022		Jun 2023		Jun 2024	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2436	2436	2500	2500	2200	2200
Beginning Stocks (1000 MT)	2281	2281	1137	1137	1422	1422
Production (1000 MT)	2708	2708	4160	4160	2500	2460
MY Imports (1000 MT)	6241	6241	6500	6500	7500	7500
TY Imports (1000 MT)	5770	5770	6500	6500	7500	7500
TY Imp. from U.S. (1000 MT)	62	62	0	0	0	0
Total Supply (1000 MT)	11230	11230	11797	11797	11422	11382
MY Exports (1000 MT)	93	93	75	75	75	75
TY Exports (1000 MT)	93	93	75	75	75	75
Feed and Residual (1000 MT)	200	200	300	300	200	200
FSI Consumption (1000 MT)	9800	9800	10000	10000	10000	10000
Total Consumption (1000 MT)	10000	10000	10300	10300	10200	10200
Ending Stocks (1000 MT)	1137	1137	1422	1422	1147	1107
Total Distribution (1000 MT)	11230	11230	11797	11797	11422	11382
Yield (MT/HA)	1.1117	1.1117	1.664	1.664	1.1364	1.1182

(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 2024/2025 = July 2024 - June 2025
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Table 5: Barley- Production, Supply, and Distribution

Barley	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jul 2022		Jul 2023		Jul 2024	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1137	1137	1170	1170	800	800
Beginning Stocks (1000 MT)	609	609	65	65	615	115
Production (1000 MT)	696	696	1350	1350	500	660
MY Imports (1000 MT)	346	346	1400	1400	1050	1500
TY Imports (1000 MT)	734	734	1200	1200	750	1500
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1651	1651	2815	2815	2165	2275
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)	886	886	1400	1800	1300	1200
FSI Consumption (1000 MT)	700	700	800	900	800	900
Total Consumption (1000 MT)	1586	1586	2200	2700	2100	2100
Ending Stocks (1000 MT)	65	65	615	115	65	175
Total Distribution (1000 MT)	1651	1651	2815	2815	2165	2275
Yield (MT/HA)	0.6121	0.6121	1.1538	1.1538	0.625	0.825

(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 2024/2025 = Oct. 2024 – Sept. 2025
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Attachments:

No Attachments