



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

Date: 5/17/2006

GAIN Report Number: MO6006

Morocco

Grain and Feed

MinAg Releases Official Grain Production Estimates 2006

Approved by:

Michael J. FAY
U.S. Embassy

Prepared by:

Aziz ABDELALI

Report Highlights:

The Moroccan Ministry of Agriculture issued its first production estimates for wheat and barley. As expected, wheat and barley production, at 8.6 MMT, is good this year and double from the previous year. Wheat (non-durum) production reached an all time record suggesting that next year's TRQ under the FTA will be at its minimum (293,333 MT).

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Rabat [MO1]
[MO]

The Ministry of Agriculture issued the first estimates of the 2006 wheat and barley crops. As expected, Morocco will have a good crop this year because of the regular and more abundant rainfall since beginning of December 2005 and throughout the production season.

Production of wheat (non-durum), at 4.2 MMT, reached an all time record level because of the combined record planted area and adequate moisture. Barley production turned out to be smaller than anticipated due partly to the lower planted area but also, to a lesser extent, to a relatively less favorable rain in the southern parts of Morocco where barley tends to prevail. The total area planted to wheat and barley was comparable to last year but was still about 350,000 ha short of the record planting in 1996.

	2000	2001	2002	2003	2004	2005	2006 (First Estimates)
PLANTED AREA (1000 MT)							
<i>Durum Wheat (1)</i>	1,079	977	882	1,093	1,111	1,059	1,069
<i>Soft Wheat (2)</i>	1,823	1,724	1,745	1,896	1,953	1,907	2,037
Total Wheat (1)+(2)	2,902	2,701	2,626	2,989	3,064	2,966	3,106
Barley	2,251	2,126	2,002	2,267	2,324	2,180	2,188
Total Planted	5,153	4,827	4,629	5,255	5,388	5,146	5,294
PRODUCTION (1000 MT)							
<i>Durum Wheat (1)</i>	427	1,039	1,032	1,766	2,025	941	1,900
<i>Soft Wheat (2)</i>	953	2,278	2,325	3,381	3,515	2,102	4,200
Tot.Wheat (1)+(2)	1,381	3,316	3,357	5,147	5,540	3,043	6,100
Barley	467	1,155	1,669	2,620	2,760	1,102	2,500
Total Production	1,848	4,472	5,026	7,767	8,300	4,145	8,600

Source: Ministry of Agriculture, Official Production data.

With a wheat crop this large, imports of wheat are expected to be significantly lower compared to last year. The tariff rate quota (for non-durum wheat) for the United States under the FTA is tied to Moroccan wheat production. This year, the tariff rate is expected to be set at its minimum level (293,333 MT for the second year of the agreement) since the estimated wheat production at 4.2 MMT exceeds the 3.0 MT. Barley imports should also be lower because of the good crop but also because of the abundance of forage this year.

The United States will still benefit significantly from the FTA preference for durum wheat and, in fact, is expected to displace other suppliers such as Canada, and Australia. Imports of durum wheat are not expected to occur from any origin during June and July because of the prohibitive duties imposed on durum wheat during these two months. On April 10th, The Moroccan government issued a tender for delivery of 40,000 MT of durum wheat from August 1 to August 31st as part of the US TRQ for durum wheat (250,000 MT first year of the agreement). The bids will be opened on May 30th.

PSD Table

Country Commodity	Morocco		(1000 HA)(1000 MT)				UOM
	2004	Revised	2005	Estimate	2006	Forecast	
Market Year Begin	USDA Official [	Estimate[1]	A Official [	Estimate[1]	A Official [	Estimate[New]	MM/YYYY
	07/2004		07/2005			07/2006	
Area Harvested	3064	3064	2966	2966	3100	3106	(1000 HA)
Beginning Stocks	2231	2312	3043	3135	1786	1506	(1000 MT)
Production	5540	5540	3043	3043	5500	6100	(1000 MT)
TOTAL Mkt. Yr. Imports	2272	2283	2900	2300	2200	1500	(1000 MT)
Jul-Jun Imports	2272	2283	2900	2300	2200	1500	(1000 MT)
Jul-Jun Import U.S.	28	19	0	100	0	500	(1000 MT)
TOTAL SUPPLY	10043	10135	8986	8478	9486	9106	(1000 MT)
TOTAL Mkt. Yr. Exports	100	100	100	72	100	100	(1000 MT)
Jul-Jun Exports	100	100	100	72	100	100	(1000 MT)
Feed Dom. Consumption	200	50	200	0	200	0	(1000 MT)
TOTAL Dom. Consumpti	6900	6900	7100	6900	7300	7000	(1000 MT)
Ending Stocks	3043	3135	1786	1506	2086	2006	(1000 MT)
TOTAL DISTRIBUTION	10043	10135	8986	8478	9486	9106	(1000 MT)

Import Trade Matrix

Country Morocco
Commodity Wheat

Time Period	MT	Units:	
Imports for:	2004		2005
U.S.	18570	U.S.	
Others		Others	
France	1016883		
Russia	365092		
Canada	332680		
Argentina	147371		
Ukraine	144110		
Australia	66000		
Uruguay	51469		
Germany	49550		
Bulgaria	45150		
Lithuania	39534		
Total for Others	2257839		0
Others not Listed	6954		
Grand Total	2283363		0

PSD Table

Country Commodity	Morocco		(1000 HA)(1000 MT)				UOM
	2004	Revised	2005	Estimate	2006	Forecast	
Market Year Begin	USDA Official [	Estimate[1]	USDA Official [	Estimate[1]	USDA Official [	Estimate[New]	MM/YYYY
	07/2004		07/2005		07/2006		
Area Harvested	2324	2324	2180	2180	0	2188	(1000 HA)
Beginning Stocks	636	610	1178	1175	380	527	(1000 MT)
Production	2760	2760	1102	1102	0	2500	(1000 MT)
TOTAL Mkt. Yr. Imports	482	405	800	700	0	500	(1000 MT)
Oct-Sep Imports	565	524	800	700	0	500	(1000 MT)
Oct-Sep Import U.S.	0	18	0	0	0	0	(1000 MT)
TOTAL SUPPLY	3878	3775	3080	2977	380	3527	(1000 MT)
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0	(1000 MT)
Oct-Sep Exports	0	0	0	0	0	0	(1000 MT)
Feed Dom. Consumption	1850	1500	1800	1300	0	1700	(1000 MT)
TOTAL Dom. Consumpti	2700	2600	2700	2450	0	2500	(1000 MT)
Ending Stocks	1178	1175	380	527	0	1027	(1000 MT)
TOTAL DISTRIBUTION	3878	3775	3080	2977	0	3527	(1000 MT)