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Report Name: Grain and Feed Annual

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Report Highlights:

Despite heavy rains in March, the 2025 wheat crop will be below the 10-year average. Production will be slightly higher than the drought impacted levels of 2024, but hot and dry weather early in the growing season and less area planted will limit total wheat production. Post forecasts MY 2025/26 production at 1.7 MMT for common wheat, 1.1 MMT for durum wheat, and 700,000 MT for barley. To cover demand while maintaining stock levels, Post forecasts Morocco's wheat imports in MY 2025/26 at 7.3 MMT, while barley imports are forecast at 0.9 MMT.

Executive Summary:

MY 2025/26

- USDA field visits in March 2025 confirmed that the Moroccan wheat and barley crop is experiencing below average vegetation growth specially in the southern regions of Marrakesh–Tensift–El Haouz, Souss-Massa. Post forecasts MY 2025/26 wheat production at 1.7 MMT for common wheat, 1.1 MMT for durum wheat, and 700,000 MT for barley. Slightly higher than MY 2024/25, yet still below the 10-year average.
- For MY 2025/26, wheat imports are projected to reach 7.3 million MT, representing approximately a 42 percent increase compared to the 10-year average.
- Russia has emerged as a significant supplier, with Morocco importing 960,137 MT of wheat from Russia between June 1 and December 30, 2024. This is about a 278% increase compared to the same period in 2023.
- Morocco’s barley imports are heavily influenced by the size of its livestock population and climatic conditions. In MY 2025/26, Morocco has announced the cancellation of Eid Al-Adha due to consecutive years of drought, which have severely impacted the size of the livestock population with numbers dropping by an estimated 38 percent from last year. This sharp reduction in livestock is expected to have a considerable impact on barley imports and barley feed consumption.
- The Government of Morocco continues to support common wheat imports based on a fixed flat-rate premium. This measure is valid until April 30, 2025, and is intended to maintain low bread prices and encourage stock building ([link](#)). On March 24, 2025, the government announced an extension of the restitutions until December 31, 2025 ([link](#)).
- In January 2025, the government of Morocco implemented a new policy aimed to support the manufacture of rice sector by eliminating tariffs and value added tax (VAT) on imported cargo rice designated for industrial use. This exemption applies within the framework of a specified quota, allowing up to 55,000 MT of cargo rice (*HS code: 1006.20.90.00*) to be imported under these conditions. The policy is set to remain in effect until December 31, 2025 ([link](#)).

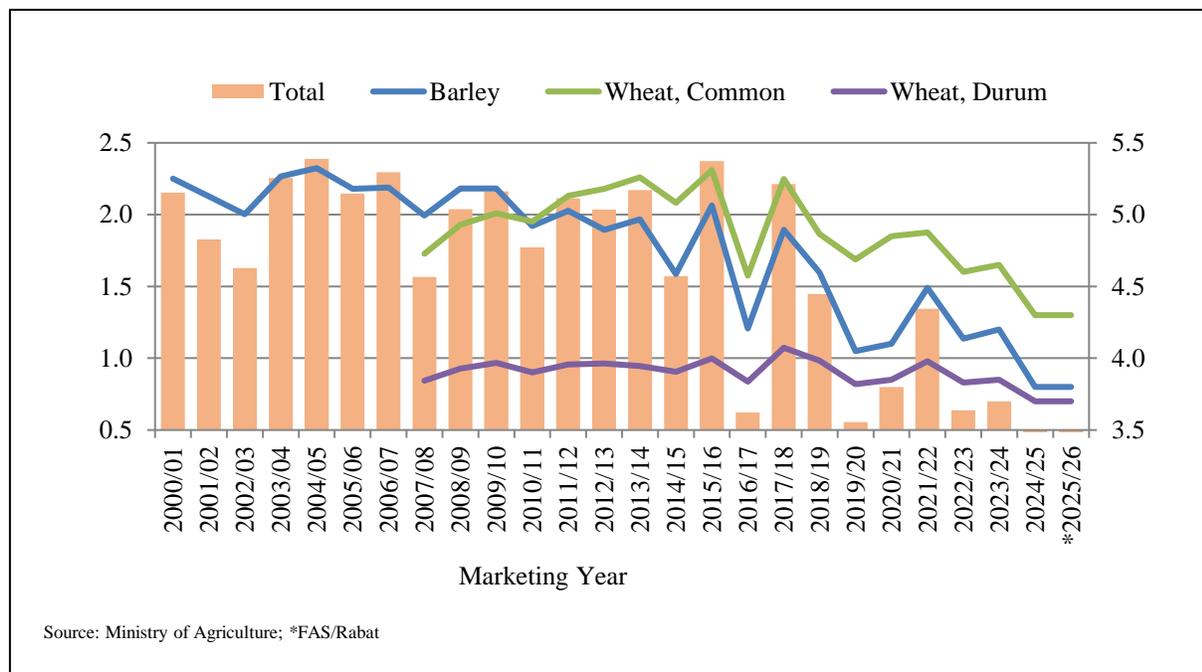
Commodities: Wheat and Barley

Area:

The 2025 season faced significant challenges, primarily due to an extended period of drought. The severe lack of rainfall at the beginning of the season resulted in substantial delays, particularly in the southern regions, where seeding was not completed until the first week of January 2025. Many farmers had postponed planting while awaiting the season's first rainfall, which arrived later than expected. Industry sources reported that at the beginning of the season, the Ministry of Agriculture had projected a total sowing area of 5 million hectares. However, the prolonged dry conditions and inadequate rainfall caused general discouragement among farmers, preventing many from proceeding with their planting plans. Consequently, only 40 percent of the initially anticipated sowing area was seeded.

Industry contacts have indicated that the area sown this season is expected to be similar to last year's levels. However, this remains 30 percent below the 10-year average. The MY 2025/26 total area harvested of common wheat and durum wheat is projected at 2.2 million hectares while barley is estimated at 800,000 hectares.

Figure 1: Moroccan Harvested Area in Hectares (HA)



Source: Ministry of Agriculture; *FAS/Rabat

In MY 2025/26, the Ministry of Agriculture is actively promoting the adoption of no-till planting practices as part of its broader strategy to support farmers in managing climate challenges. The areas of Rabat-Kenitra, Khemissat, Meknes and Fes have set a goal to apply this technique across 200,000 Ha by 2030.

Production:

Morocco's grain production continues to face significant challenges due to persistent dry weather conditions. At the start of the planting season, limited precipitation resulted in delayed planting, which extended until January. This variance in planting timelines has led to noticeable differences in crop development across the fields. Crops that were planted earlier in the season appear considerably weaker and are expected to produce yields well below average due to prolonged dry conditions that persisted from December through February. However, crops planted later in the season are showing more promising conditions. These fields benefited from improved soil moisture following the heavy rains that arrived in March, providing a much-needed boost to crop development. USDA field visits in March 2025 confirmed that the Moroccan wheat and barley crop is experiencing below average vegetation growth especially in the southern regions of Marrakesh–Tensift–El Haouz, Souss-Massa. Post forecasts MY 2025/26 wheat production at 1.7 MMT for common wheat, 1.1 MMT for durum wheat, and 700,000 MT for barley. Slightly higher than MY 2024/25, yet still below the 10-year average.

Figure 2: Morocco – Relative Crop Conditions (Modis NDVI 8-Day), October- September

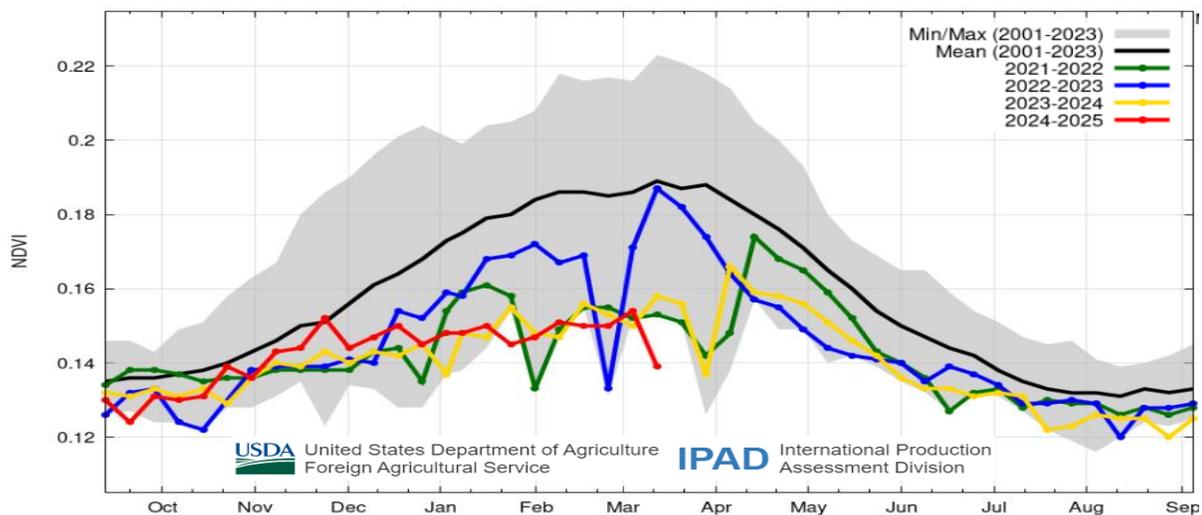


Figure 3: Morocco – WMO Monthly Precipitation, October- August

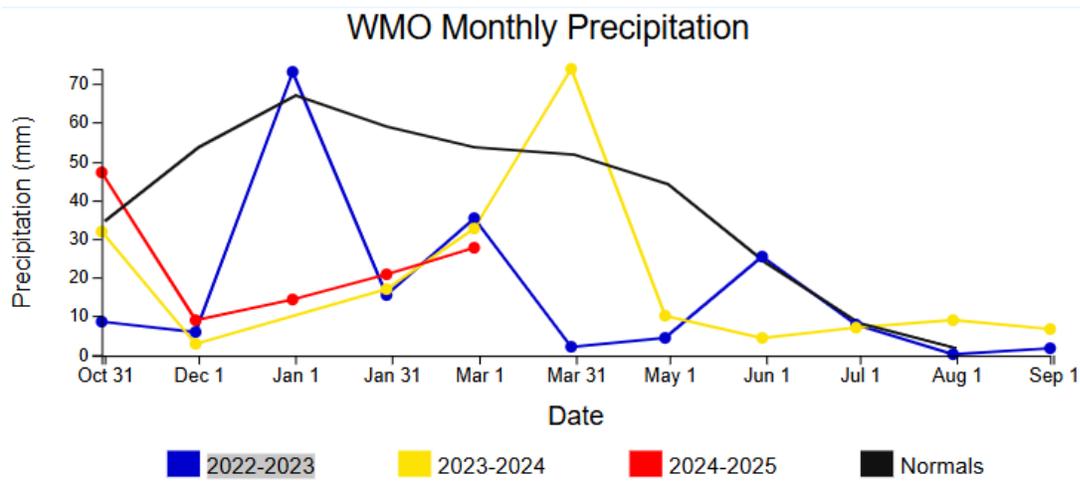
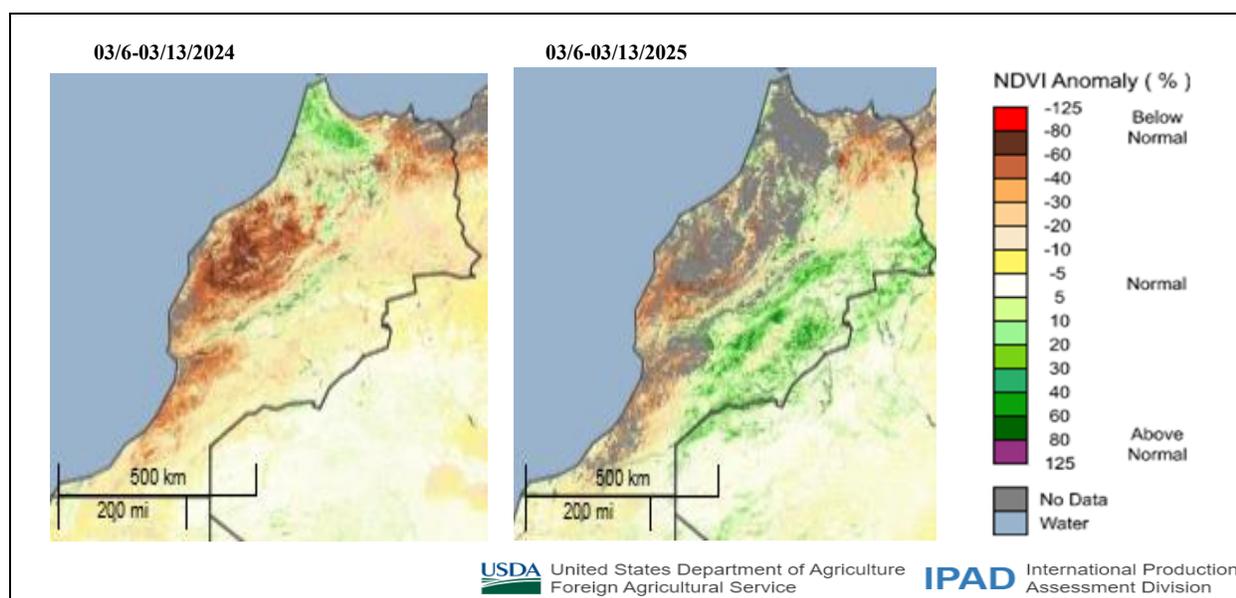


Figure 4: Moroccan Vegetative Index Comparison MY 2025/26 and MY 2024/25



Morocco continues to experience drought conditions; however, the situation is showing signs of improvement compared to last year.

Consumption

Bread is an important staple in the Moroccan diet and is served with most meals. In MY2025/26, Post holds total domestic consumption steady on a per capita basis at 288 kg, based on a population of 36.3 million, at around 10 MMT. 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. For MY 2025/26, the industry anticipates a substantial decline in feed consumption due to significant decrease in livestock numbers in Morocco. Current estimates suggest that feed consumption is expected to drop by approximately 42 percent compared to the previous year. This reduction is attributed to reduced livestock populations due to consecutive years of drought. Post forecasts barley total consumption at 1.6 MMT. The total amount for barley for industrial uses is quite steady.

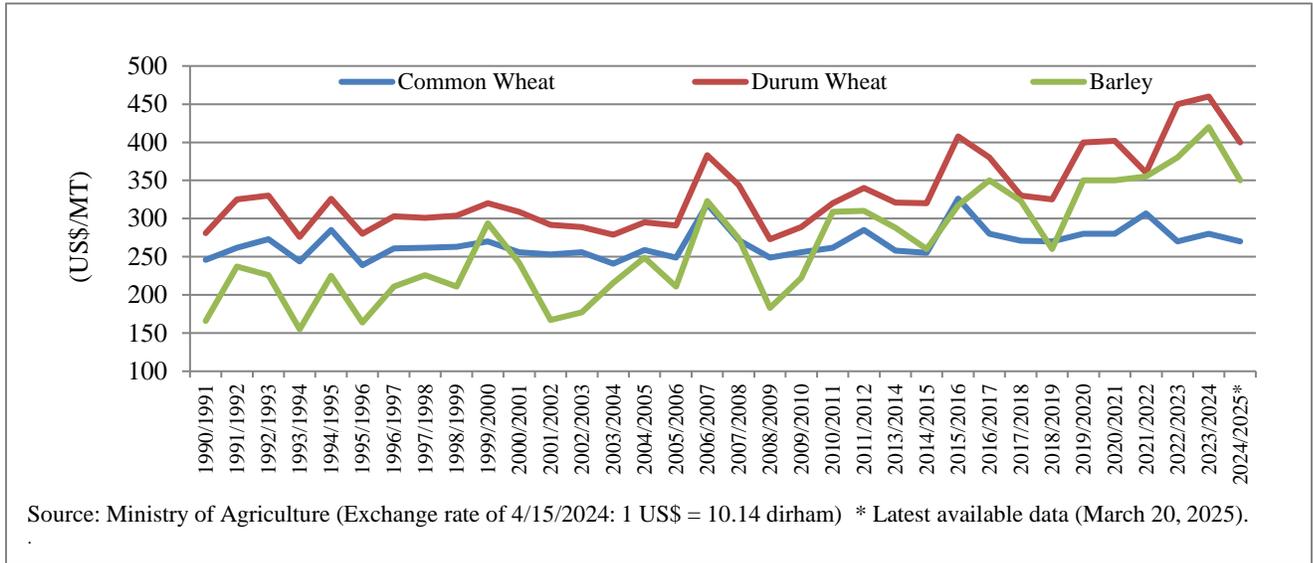
Prices

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 ([Link](#)).

- ONICL subsidizes common wheat flour, known as “National Flour,” to support low-income consumers. In calendar year 2025, the quota was set at 600,000 MT, unchanged from 2024.
- Common wheat prices are falling and returning to levels from before the war in Ukraine.

Figure 5: Moroccan Average Local Prices for Wheat and Barley

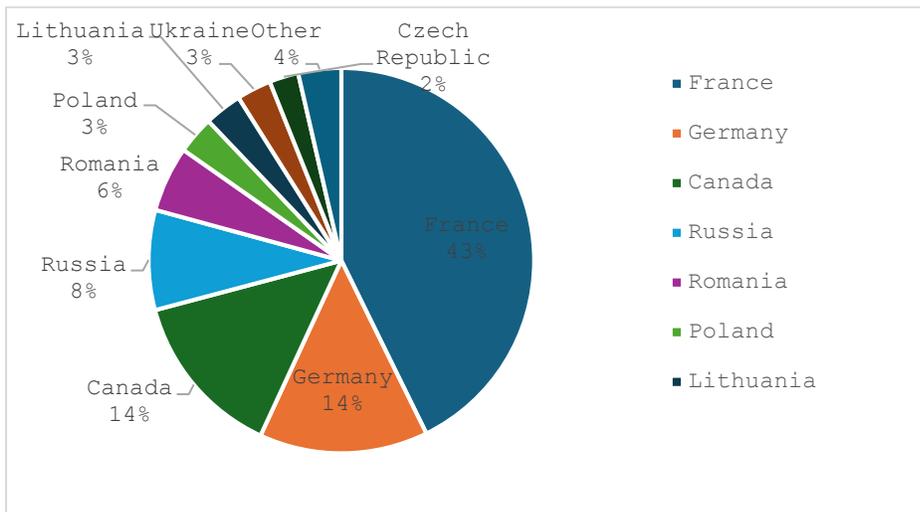


Trade

Wheat

For MY 2025/26, wheat import is projected to see a slight decrease from last year, reaching 7.3 million MT, due to a modest increase in domestic production compared to last year. However, this figure still represents a 42 percent increase compared to the 10-year average.

Figure 6: Morocco Wheat Imports by Origin in MY 2024/25



Source: Trade Data Monitor, Moroccan Office des Changes

In MY 2024/25, Morocco has diversified its wheat import sources. Traditionally reliant on France, the country has expanded its suppliers to include Germany, Canada, Russia, Romania, Poland. Russia has emerged as a significant supplier, with Morocco importing 960,137 MT of wheat from Russia between June 1 and December 30, 2024, about 278% increase during the same period in 2023.

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

	Marketing Year					Year to Date		
	2019/20	2020/21	2021/22	2022/23	2023/24	06/23-12/23	06/24-12/24	%Δ
France	1,894,879	1,083,612	1,291,719	3,175,958	2,566,166	1,270,953	832,689	-34
Germany	424,590	113,927	33,057	977,389	850,495	406,183	172,073	-58
Canada	927,924	1,290,992	539,608	1,068,583	839,246	339,664	536,143	58
Russia	364,276	205,675	29,830	0	503,440	253,741	960,137	278
Romania	52,155	69,460	28	184,608	329,906	274,412	168,628	-39
Poland	128,162	380,083	171,926	257,276	189,530	128,987	31,792	-75
Lithuania	33,000	117,772	6,320	192,428	189,390	173,510	75,362	-57
Ukraine	631,303	1,101,408	596,634	14,801	174,062	61,044	232,414	281
Czech Republic	0	0	0	57,967	147,163	92,459	58,863	-36
Other	169,725	1,081,254	1,401,609	311,449	216,451	146,166	382,753	2
Total	4,626,017	5,444,178	4,070,732	6,240,459	6,005,850	3,147,122	3,450,855	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	Description	Marketing Year			Year to Date		
		2021/22	2022/23	2023/24	06/23-12/23	06/24-12/24	%Δ
1001	Wheat and Meslin	4,056,643	6,225,815	5,988,882	3,135,286	3,444,807	10
190219	Pasta, Uncooked, Not Stuffed	11,404	10,940	14,255	10,090	4,812	-52
190230	Pasta, prepared, nesoi	2,112	3,125	2,228	1,477	638	-57
1101	Wheat or Meslin Flour	381	420	292	201	259	29
190430	Bulgur wheat, pre-cooked	78	152	119	32	89	178
190240	Couscous	113	7	74	36	250	594
Total	PSD-Wheat	4,070,732	6,240,459	6,005,850	3,147,122	3,450,855	10

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		
		2021/22	2022/23	2023/24	06/23-12/23	06/24-12/24	%Δ
190240	Couscous	54,283	52,882	65,140	36,993	40,295	9
190219	Pasta, Uncooked, Not Stuffed	20,373	30,214	48,747	25,583	36,189	41
190230	Pasta, prepared, nesoi	7,444	8,042	6,170	4,078	2,601	-36
1101	Wheat or meslin flour	1,263	1,781	5,226	1,384	4,522	227
1001	Wheat and meslin	0	120	59	0	0	0
190430	Bulgur wheat, pre-cooked	3	3	1	0	2	0
Total	PSD-Wheat	83,366	93,042	125,343	68,037	83,608	23

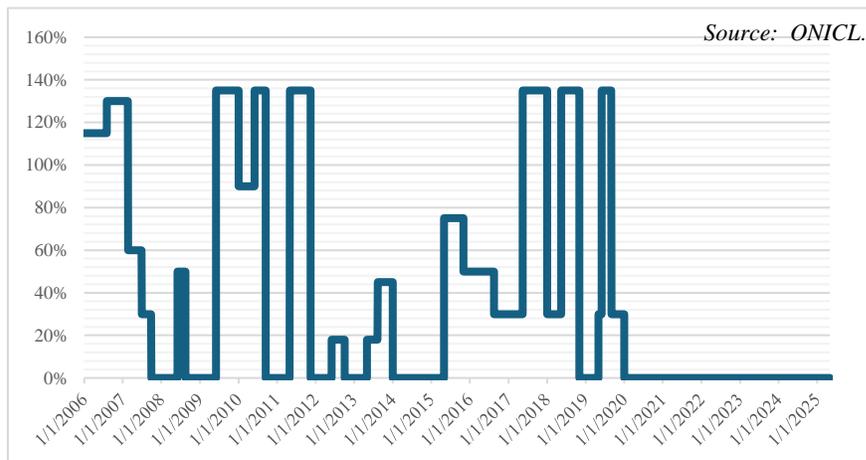
Source: Morocco office de change, applied converting factor: 1.368, MY used for wheat June-May

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 MY2025/26, the Moroccan government maintains its policy of exempting common wheat imports of duties to guarantee ample supply and stabilize prices in the domestic market. As a result, U.S. wheat exports to Morocco will not have an advantage due to their preferential tariff under the U.S.-Morocco FTA for the rest of the import season.

Figure 7: Morocco MFN Tariff on Common Wheat Imports



Barley

Morocco's barley imports are heavily influenced by the size of its livestock population and climatic conditions. In MY 2025/26, Morocco has announced the cancellation of Eid Al-Adha due to consecutive years of drought, which have severely impacted the size of livestock with numbers dropping by an estimated 38 percent from last year. This sharp reduction in livestock is expected to have a considerable impact on barley imports. Post forecasts barley imports to reach 900,000 MT.

Table 4: Barley Imports by Origin in MY 2024/25

Partner Country	Marketing Year				Year to Date		
	2020/21	2021/22	2022/23	2023/24	07/23-12/23	07/24-12/24	%Δ
Germany	129,946	238,837	287,276	446,082	134,281	69,031	-49
Romania	34,500	6,350	12,531	339,878	302,496	129,303	-57
Russia	25,041	49,369	0	269,397	126,902	0	-100
Bulgaria	57,565	0	0	179,704	126,772	62,583	-51
France	6,247	416,485	13,888	84,478	7,312	56,850	677
Hungary	2,085	0	11,018	66,797	27,686	8,213	-70
Lithuania	38,876	22,003	20,496	61,262	16,428	31,686	93
Other	187,212	243,333	1,235	85,479	42,090	38,464	-9%
Total	481,472	976,378	346,445	1,533,078	783,967	396,130	-49

Source: Morocco office de change

Stocks

Although official statistics on wheat and barley stocks are not publicly available, industry contacts indicated that as of March 1, 2025, Morocco has a wheat supply that can last for two and half months of consumption, and that importers are actively engaging in contract negotiating to build up stocks. Generally, stocks held by agents licensed by ONICL, including grain merchants, cooperatives, processors, and government managed port silos, are generally known.

These agents are paid a storage premium based on wheat stored and declared to ONICL, which calculates the storage premium every 15 days at a rate of \$2/MT. Only a small portion of Moroccan barley passes through official collection channels, and data on barley stocks is inconclusive.

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, 2025, and is intended to maintain low bread prices and encourage stock building. ([link](#)). On March 24, 2025, the government announced an extension of the restitutions until December 31, 2025 ([link](#)).

Production, Supply, and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jun 2023		Jun 2024		Jun 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2434	2434	2200	2200	0	2200
Beginning Stocks (1000 MT)	1137	1137	1176	1176	0	1026
Production (1000 MT)	4158	4158	2460	2460	0	2800
MY Imports (1000 MT)	6006	6006	7500	7500	0	7300
TY Imports (1000 MT)	6205	6205	7500	7500	0	7300
TY Imp. from U.S. (1000 MT)	29	29	0	0	0	0
Total Supply (1000 MT)	11301	11301	11136	11136	0	11126
MY Exports (1000 MT)	125	125	110	110	0	100
TY Exports (1000 MT)	127	127	110	110	0	100
Feed and Residual (1000 MT)	200	200	200	200	0	200
FSI Consumption (1000 MT)	9800	9800	9800	9800	0	9800
Total Consumption (1000 MT)	10000	10000	10000	10000	0	10000
Ending Stocks (1000 MT)	1176	1176	1026	1026	0	1026
Total Distribution (1000 MT)	11301	11301	11136	11136	0	11126
Yield (MT/HA)	1.7083	1.7083	1.1182	1.1182	0	1.2727

(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 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1170	1170	800	800	0	800
Beginning Stocks (1000 MT)	65	65	598	598	0	108
Production (1000 MT)	1350	1350	660	660	0	700
MY Imports (1000 MT)	1533	1533	1050	1050	0	900
TY Imports (1000 MT)	1462	1462	750	750	0	900
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2948	2948	2308	2308	0	1708
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)	1550	1550	1400	1400	0	800
FSI Consumption (1000 MT)	800	800	800	800	0	800
Total Consumption (1000 MT)	2350	2350	2200	2200	0	1600
Ending Stocks (1000 MT)	598	598	108	108	0	108
Total Distribution (1000 MT)	2948	2948	2308	2308	0	1708
Yield (MT/HA)	1.1538	1.1538	0.825	0.825	0	0.875
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

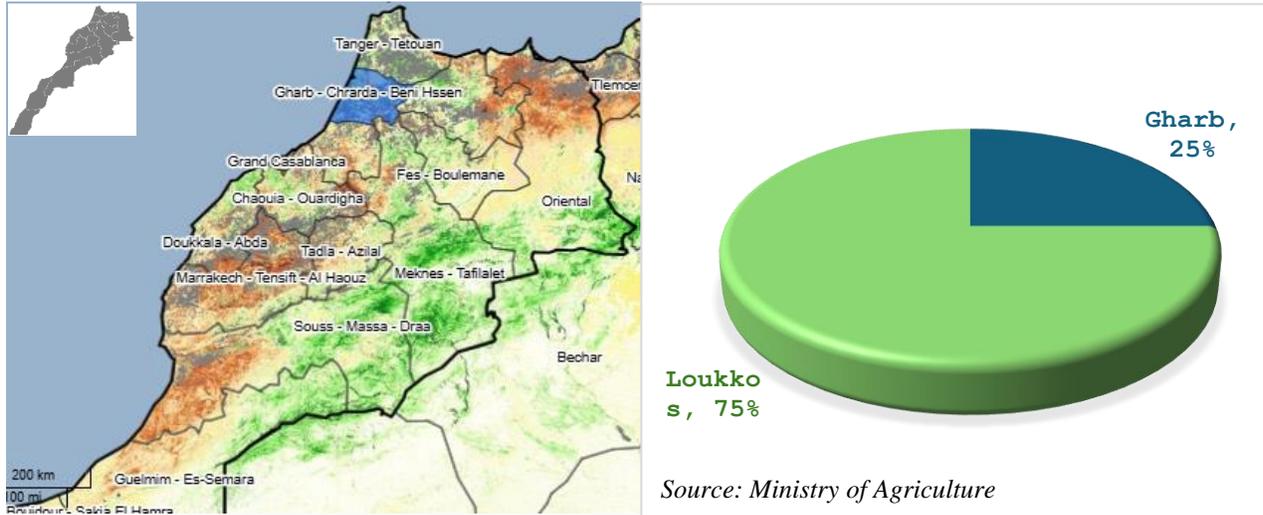
Commodities: Rice, Milled

Production

In contrast to wheat and barley, rice cultivation in Morocco relies on irrigation. The main rice growing areas are in the Gharb plain, particularly in the provinces of Loukkos and Gharb, where irrigation systems support rice production. The sowing period starts between April and May. Industry sources indicate that the late rains country received in March are expected to support the start of the rice growing season. For MY 2025/26, the industry projects that the planted area will reach 9000 hectares, with production is anticipated to reach 48,000 MT, about 33 percent increase from previous year, due to favorable weather conditions during the planting.

For MY 2024/25, Post is adjusting its estimates downward for both the harvested area and production numbers due to prolonged drought and insufficient irrigation in 2024 season, which have impacted crop development.

Figure 8: Rice Production Map- Area Highlighted in Blue



Consumption

Rice is not a staple food in Morocco and its consumption has not increased significantly as consumers continue to opt for bread wheat and couscous. For MY 2025/26, Post projects total domestic consumption at 128,000 MT about 2 percent increase from the previous year. This forecast is based on the ongoing growth of the hotel, restaurant, and institutional (HRI) sector, along with an increase in tourism industry.

Trade

India maintained its dominant position in the Moroccan market in MY 2023/24, exporting 46,000 MT to Morocco, which account for 52 percent of the country's total rice imports. For MY 2024/25, Egyptians rice exports to Morocco showed notable growth. Between October and December, Egypt exported 10,668 MT to the Moroccan market. However, industry sources indicated that a significant quantity of this rice is sourced from China and subsequently packaged

in Egypt before being exported. For MY 2025/26, Morocco's rice imports are projected to reach 80,000 MT about 10 percent down compared to the previous year. This decline is attributed to the weather improvement and the heavy rainfall the country received in March which improved domestic production.

Table 4: Rice Imports by Origin in MY 2024/25

Partner Country	Marketing Year				Year to Date		
	2020/21	2021/22	2022/23	2023/24	10/23-12/23	10/24-12/24	%Δ
India	16,846	30,163	51,753	46,016	16,212	12,595	-22
Egypt	0	0	0	14,574	75	10,668	14124
Thailand	4,856	19,872	8,656	6,699	269	1,998	643
Italy	1,198	1,309	1,138	3,648	1,098	223	-80
Greece	700	0	0	3,612	50	100	100
Portugal	410	1,884	1,907	3,358	561	664	18
Pakistan	1,911	7,475	1,114	2,381	1,542	174	-89
China	11,894	1,556	3,480	1,803	1,551	1	-100
Taiwan	0	0	0	1,750	0	0	0
United States	1,069	2,832	572	1,568	763	133	-83
Other	523	1,599	5,340	3,390	111	454	
Total	39,409	66,688	73,960	88,800	22,233	27,011	21

Source: Morocco office de change

Table 7: Imports by Marketing Year (MT) Conversion to Milled Eq.

HS	Description	Marketing Year			Year to Date		
		2021/22	2022/23	2023/24	10/23-12/23	10/24-12/24	%Δ
100630	Rice, semi-milled or wholly milled	65,153	72,516	86,293	22,192	26,693	20
100640	Rice, broken	129	527	1,609	27	304	1026
100610	Rice in the husk (paddy or rough)	1,218	863	604	0	1	0
100620	Rice, husked (brown)	188	54	294	14	14	0
Total	PSD-rice, milled	66,688	73,960	88,800	22,233	27,011	21

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

Policy

In January 2025, the government of Morocco implemented a new policy aimed to support the manufacture of sector by eliminating tariffs and value added tax (VAT) on imported cargo rice designated for industrial use. This exemption applies within the framework of a specified quota, allowing up to 55,000 MT of cargo rice (*HS code: 1006.20.90.00*) to be imported under these conditions. The policy is set to remain in effect until December 31, 2025.

Production, Supply, and Distribution

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8	8	8	7	0	9
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Milled Production (1000 MT)	45	45	45	36	0	48
Rough Production (1000 MT)	69	69	69	55	0	74
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	0	6500
MY Imports (1000 MT)	79	79	80	89	0	80
TY Imports (1000 MT)	57	57	80	89	0	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	124	124	125	125	0	128
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)	124	124	125	125	0	128
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	124	124	125	125	0	128
Yield (Rough) (MT/HA)	8.625	8.625	8.625	7.8571	0	8.2222
(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 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments