

Required Report: Required - Public Distribution

Date: January 23, 2025

Report Number: MO2025-0001

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:

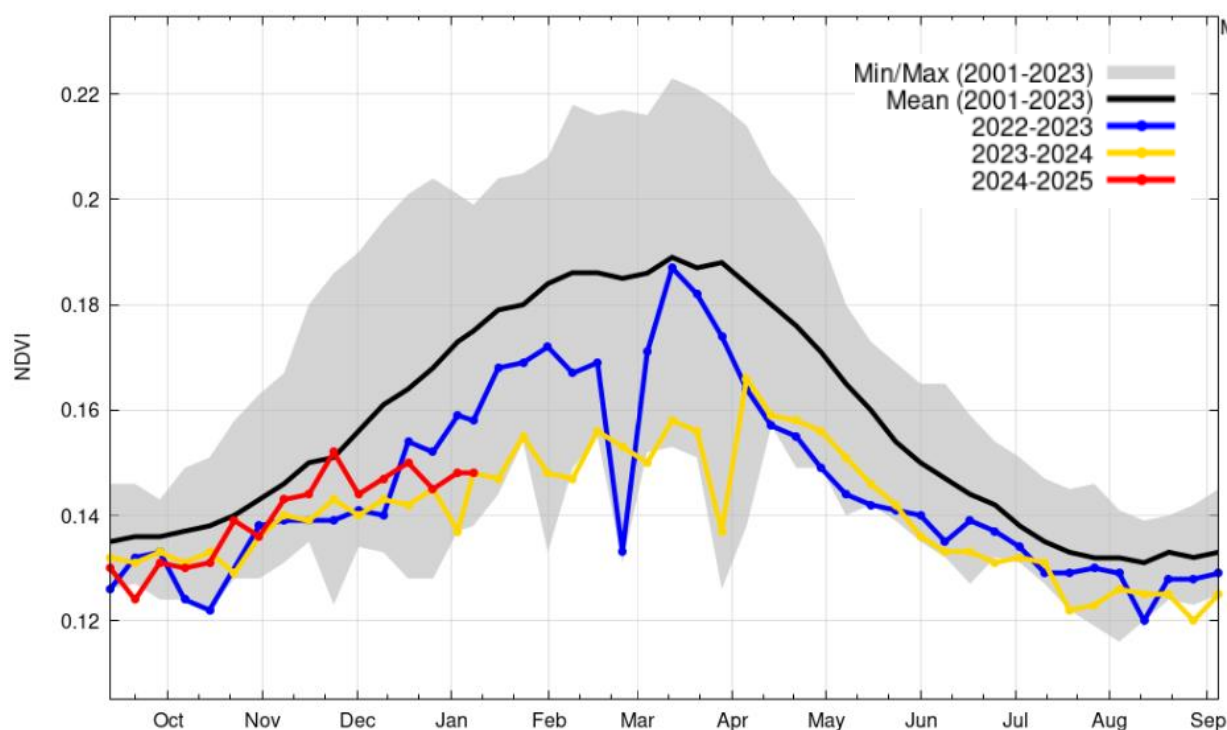
The Government of Morocco continues to subsidize bread wheat imports based on a fixed flat-rate premium. This measure is valid until April 30, 2025, and is intended to maintain low bread prices and encourage stock building. Post has no changes for production, supply, and demand estimates for MY 2024/2025.

General Information:

Production Update

The late arrival of rains in 2024 delayed wheat and barley planting, sowing in some areas was not completed until the end of December. The total area planted to cereals for common wheat, durum and barley is estimated by the Ministry of Agriculture to reach 5 million hectares (HA), about 30 percent above five-year average. Post notes that this season has started off better than the previous one, however, the vegetation index remains below average, the upcoming rainfall during February until the end of March are critical for crop development and will determine the success of the 2025 production campaign. Post's production, supply, and demand forecast (PSD) for MY 2025/26 will be published in its Grain and Feed Annual Report on April 1, 2025.

Figure 1: Morocco Crop Conditions-MODIS Normalized Difference Vegetation Index (NDVI)



USDA United States Department of Agriculture
Foreign Agricultural Service

IPAD International Production
Assessment Division

Policy Update

On December 25, 2024, the Government of Morocco announced the continued subsidy of bread wheat imports based on a fixed flat-rate premium in response to strong global wheat prices. The current subsidy measures are valid until April 30, 2025. ([link](#))

Trade Update

Traditionally, Morocco has sourced most of its wheat from the European Union, particularly from France. However, due to France's reduced harvest and quality issues in MY2024/25, Moroccan importers have shifted towards Black Sea countries. Morocco has exported 125,343 MT equivalent of wheat products in MY 2023/24. This is primarily as pasta and couscous to the West African markets.

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

Partner Country	Marketing year			Year to Date		
	2021/22	2022/23	2023/24	06/23-10/23	06/24-10/24	%Δ
EU 27	1,593,372	5,001,668	4,415,584	1,827,898	1,185,774	-35.13%
Canada	539,608	1,068,583	839,246	193,134	374,996	94.16%
Russia	29,830	0	503,440	54,800	595,576	986.82%
Ukraine	596,634	14,801	174,062	49,465	218,914	342.56%
United States	1	31,902	28,813	19,989	15,874	-20.59%
Other	1,311,286	123,506	44,704	30,385	2,030	-93.32%
Total	4,070,732	6,240,459	6,005,850	2,175,674	2,393,166	10.00%

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

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

Partner Country	Marketing Year			Year to Date		
	2021/22	2022/23	2023/24	06/23-10/23	06/24-10/24	%Δ
EU 27	30,084	24,620	28,898	7,864	12,233	56%
Senegal	14,617	22,616	38,343	11,868	13,956	18%
Togo	4,383	6,072	8,681	4,579	4,694	3%
Benin	3,571	5,642	8,192	4,439	3,734	-16%
Guinea	7,670	10,154	8,159	2,624	4,376	67%
Cote d'Ivoire	1,875	2,534	4,144	1,513	1,610	6%
Burkina Faso	2,897	1,558	3,086	853	1,638	92%
Haiti	0	0	2,562	205	3,075	1400%
Other	18,272	19,843	23,282	8,303	9,075	9%
Total	83,366	93,042	125,343	42,249	54,393	29%

Source: Morocco office de change, *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		
	2021/22	2022/23	2023/24	07/23-10/23	07/24-10/24	%Δ
EU 27	786,171	346,445	1,222,044	438,206	331,105	-24
Russia	49,369	0	269,397	37,632	0	-100
Ukraine	50,238	0	28,337	6,797	32,650	380
Moldova	0	0	13,298	13,298	0	-100
Other	90,600	-	-	0	0	0
Total	976,378	346,445	1,533,078	495,934	363,755	-27

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

Production, Supply, and Distribution

Table 4: PSD for Wheat

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	2434	2434	2200	2200
Beginning Stocks (1000 MT)	2281	2281	1137	1137	1176	1176
Production (1000 MT)	2708	2708	4158	4158	2460	2460
MY Imports (1000 MT)	6241	6241	6006	6006	7500	7500
TY Imports (1000 MT)	5770	5770	6205	6205	7500	7500
TY Imp. from U.S. (1000 MT)	62	62	29	29	0	0
Total Supply (1000 MT)	11230	11230	11301	11301	11136	11136
MY Exports (1000 MT)	93	93	125	125	75	75
TY Exports (1000 MT)	93	93	127	127	75	75
Feed and Residual (1000 MT)	200	200	200	200	200	200
FSI Consumption (1000 MT)	9800	9800	9800	9800	9800	9800
Total Consumption (1000 MT)	10000	10000	10000	10000	10000	10000
Ending Stocks (1000 MT)	1137	1137	1176	1176	1061	1061
Total Distribution (1000 MT)	11230	11230	11301	11301	11136	11136
Yield (MT/HA)	1.1117	1.1117	1.7083	1.7083	1.1182	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: PSD for Barley

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	598	598
Production (1000 MT)	696	696	1350	1350	660	660
MY Imports (1000 MT)	346	346	1533	1533	1150	1150
TY Imports (1000 MT)	734	734	1462	1462	850	850
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1651	1651	2948	2948	2408	2408
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	1550	1550	1500	1500
FSI Consumption (1000 MT)	700	700	800	800	800	800
Total Consumption (1000 MT)	1586	1586	2350	2350	2300	2300
Ending Stocks (1000 MT)	65	65	598	598	108	108
Total Distribution (1000 MT)	1651	1651	2948	2948	2408	2408
Yield (MT/HA)	0.6121	0.6121	1.1538	1.1538	0.825	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 = October 2024 - September 2025						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments