



USDA Foreign Agricultural Service

# GAIN Report

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## Morocco

### Grain and Feed

### Ministry of Agriculture Estimates for Wheat and Barley Production

**2005**

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**Report Highlights:**

The Ministry of Agriculture released official production estimates for the 2005 wheat and barley crops. Production is slightly lower than forecast of AgAtt and suggests that, under the Free Trade Agreement, the tariff rate quotas for US wheat will be at its maximum level of 700,000 MT.

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Includes PSD Changes: Yes  
Includes Trade Matrix: No  
Unscheduled Report  
Rabat [MO1]  
[MO]

The Ministry of Agriculture released estimates of the wheat and barley crop for 2005. Estimates are slightly lower than the forecast made by AgAtt and is significantly lower compared to last year level. The drier than normal weather during the spring (virtually no rain since first week of March) affected negatively the barley and wheat yields throughout Morocco and resulted in many fields being completely lost or left out for grazing, especially in the center and center south area of the country.

Year of Harvest	2000	2001	2002	2003	2004	5 Year Avg		AgAtt Forecast	MinAg Estimates
<b>Planted Area (1,000 MT)</b>									
Durum	1,079.1	976.7	881.7	1,092.9	1,110.5	1,028.2		900.0	1,059.0
Wheat	1,822.5	1,723.9	1,744.7	1,896.0	1,953.2	1,828.1		1,800.0	1,906.7
TotalWheat	2,901.6	2,700.6	2,626.4	2,988.9	3,063.7	2,856.2		2,700.0	2,965.7
Barley	2,250.9	2,126.0	2,002.4	2,266.5	2,324.1	2,194.0		2,000.0	2,180.0
TotalArea	<b>5,152.5</b>	<b>4,826.6</b>	<b>4,628.8</b>	<b>5,255.4</b>	<b>5,387.8</b>	<b>5,050.2</b>		<b>4,700.0</b>	<b>5,145.7</b>
<b>Production (1,000 MT)</b>									
Durum	427.4	1,038.8	1,031.5	1,766.2	2,024.8	1,257.7		900.0	766.5
Wheat	953.3	2,277.6	2,325.2	3,380.6	3,515.1	2,490.4		2,000.0	1,752.6
TotalWheat	1,380.7	3,316.4	3,356.7	5,146.8	5,539.9	3,748.1		2,900.0	2,519.1
Barley	466.8	1,155.2	1,669.0	2,620.4	2,760.4	1,734.4		1,100.0	1,054.8
<b>Total Prod.</b>	<b>1,847.5</b>	<b>4,471.6</b>	<b>5,025.7</b>	<b>7,767.2</b>	<b>8,300.3</b>	<b>5,482.5</b>		<b>4,000.0</b>	<b>3,573.9</b>

At the production level announced by Ministry of Agriculture, the TRQ for U.S. wheat (non-durum) under the FTA should be at its maximum level i.e. 700,000 MT during the next quota period. In addition, the United States has a TRQ for durum wheat of 250,000 MT. Thus, the U.S. share in the wheat market should increase considerably during 2005/2006.

Under the Morocco-EU FTA, the EU TRQ for non-durum wheat depends on the level of Morocco's production and it should be at its maximum level i.e. 1.06 MMT. The EU durum wheat quota is relatively small (5,000 MT) and does not depend on the level of production. The EU has also a flat TRQ for barley (100,000 MT) and malting barley (12,000 MT in 2005 increasing to 16,000 MT in 2007).

## PSD Table

Country Commodity	Morocco				(1000 HA)(1000 MT)		UOM
	2003	Revised	2004	Estimate	2005	Forecast	
	USDA Official	Estimate [DA Official]	Estimate [DA Official]	Estimate [DA Official]	Estimate [New]		
Market Year Begin	07/2003		07/2004		07/2005	MM/YYYY	
Area Harvested	2989	2989	3064	3064	2700	2966	(1000 HA)
Beginning Stocks	1143	1235	2231	2312	2971	3152	(1000 MT)
Production	5147	5147	5540	5540	2900	2519	(1000 MT)
TOTAL Mkt. Yr. Imports	2414	2575	2200	2200	2700	2900	(1000 MT)
Jul-Jun Imports	2414	2575	2200	2200	2700	2900	(1000 MT)
Jul-Jun Import U.S.	402	491	0	80	0	1000	(1000 MT)
TOTAL SUPPLY	8704	8957	9971	10052	8571	8571	(1000 MT)
TOTAL Mkt. Yr. Exports	73	45	100	100	100	100	(1000 MT)
Jul-Jun Exports	73	45	100	100	100	100	(1000 MT)
Feed Dom. Consumption	200	0	200	100	200	100	(1000 MT)
TOTAL Dom. Consumption	6400	6600	6900	6800	7000	6800	(1000 MT)
Ending Stocks	2231	2312	2971	3152	1471	1671	(1000 MT)
TOTAL DISTRIBUTION	8704	8957	9971	10052	8571	8571	(1000 MT)

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Market Year Begin	07/2003		07/2004		07/2005	MM/YYYY	
Area Harvested	2267	2267	2324	2324	2000	2180	(1000 HA)
Beginning Stocks	225	253	636	610	996	1170	(1000 MT)
Production	2620	2620	2760	2760	1100	1055	(1000 MT)
TOTAL Mkt. Yr. Imports	91	137	100	300	200	800	(1000 MT)
Oct-Sep Imports	143	198	100	200	200	800	(1000 MT)
Oct-Sep Import U.S.	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	2936	3010	3496	3670	2296	3025	(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	1400	1400	1500	1500	1300	1300	(1000 MT)
TOTAL Dom. Consumption	2300	2400	2500	2500	2100	2450	(1000 MT)
Ending Stocks	636	610	996	1170	196	575	(1000 MT)
TOTAL DISTRIBUTION	2936	3010	3496	3670	2296	3025	(1000 MT)