



GIEWS Country Brief The Kingdom of Morocco

Reference Date: 26-July-2023

FOOD SECURITY SNAPSHOT

- **Below-average cereal production harvested in 2023**
- **Close-to-average cereal import requirement expected in 2023/24**
- **Food price inflation eases reflecting slightly lower global prices**

Below-average cereal production harvested in 2023

Harvesting of the 2023 main winter grain crops concluded in mid-July. Cereals, cultivated on slightly over half of the arable land, are almost entirely rainfed and their output is highly variable year-on-year depending on rainfall amounts and distribution. Out of the past five agricultural seasons, four were affected by drought with different degrees of intensity.

Following a favourable start of the season between October and December 2022, large areas of the country experienced below-average rainfall amounts last January. Then, improved rains in February brought some respite to crops in north and western areas of the country. Rainfall returned to significantly below-average levels in March and April, and high temperatures in April accelerated grain maturation. However, production fared better in some western and central parts of the country due to slightly enhanced rainfall amounts.

As a result of drought conditions, wheat production is estimated at about 4.1 million tonnes, about 17 percent below the five-year average, but over 60 percent more than the severely drought-stricken production in 2022. Barley output in 2023 is estimated at 1.35 million tonnes, 20 percent above the five-year average and almost twice the 2022 harvest.

The government supports wheat production through the establishment of a reference price for purchasing local production. The price for 2023 was set at MAD 3 000/tonne, unchanged from the previous year, up from MAD 2 800/tonne between 2017 and 2021. As of June, the amount was equivalent to USD 300/tonne. The government also provides a storage premium to farmers that decide to store wheat grain in licensed facilities.

In June 2023, the [government](#) extended the ongoing plan to mitigate the impact of recurrent droughts on the agricultural sector. The support, worth MAD 10 million (equivalent to slightly over USD 1 billion) includes measures for livestock production

Morocco

Crop Calendar

(*major foodcrop)



Morocco

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Wheat	4 794	2 500	4 100	64.0
Barley	1 625	690	1 350	95.7
Rice (paddy)	61	54	54	1.5
Others	82	74	62	-16.2
Total	6 562	3 318	5 566	67.8

Note: Percentage change calculated from unrounded data.

(including feed), horticultural value chains and the provision of financing for agriculture.

Cereal imports to ease in 2023/24 as domestic production recovers slightly

The country relies heavily on cereal imports to cover its consumption needs. The 2023/24 cereal import requirement (July/June) is forecast at an average level of 8.3 million tonnes, about 5 percent below 2022/23 imports.

Wheat constitutes about 60 percent of the cereal imports. In the past, the European Union and the Black Sea countries supplied most of the common “soft” wheat, although the share of Argentina and Brazil has been increasing. During the past four years, wheat imports from Ukraine and the Russian Federation were about 20 and 7 percent, respectively, of the total imports. In the 2022 calendar year, a negligible 1 percent of total wheat grain imports was sourced from Ukraine and no grains were imported from the Russian Federation.

The country applies tariffs on wheat imports to protect local producers from international competition and revises the duties on a periodic basis depending on the domestic supply and demand situation. Usually, import duties are set at the highest levels at harvest time. Since November 2021, import duties on the “soft” (common) and “durum” wheat have been suspended to encourage stock building. The current suspension remains valid until 31 December 2023.

Due to the excess milling capacity in the country, some quantities of wheat flour, couscous and pasta, are exported to neighbouring countries.

Food price inflation eases, reflecting adjustments in international prices

The country is dependent on grain and energy imports. As the world’s main exporter of phosphate, the value of the country’s phosphate exports doubled in the first quarter 2022 compared to the same period in 2021, supported by high international fertilizer prices. While phosphate prices declined from their peaks, they remain currently above the levels from two years ago and only partially offset the increase in the total import bill resulting from still elevated global food and energy prices.

In spite of the country’s high import dependency rate, the transmission of high international prices on domestic markets is mitigated by government subsidies. In June 2023, the annual food inflation rate was estimated at 13.1 percent, steadily decreasing from the peak of 20 percent recorded in February 2023, the highest level recorded since the beginning of the series in 2010. The general price inflation in June was estimated at 5.5 percent.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

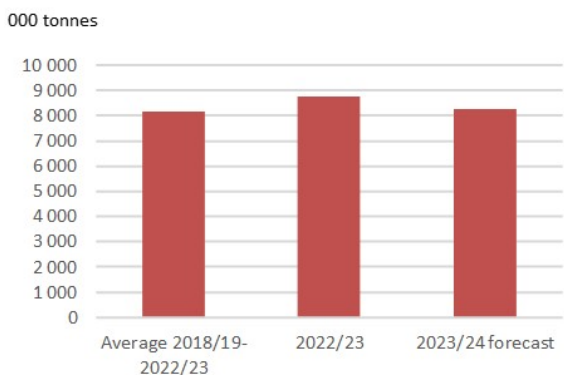
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

Morocco

Cereals Imports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).



GIEWS Country Brief Morocco

Reference Date: 21-July-2022

FOOD SECURITY SNAPSHOT

- Well below-average cereal production harvested in 2022
- Wheat imports expected to increase in 2022/23 owing to constrained domestic production
- Food price inflation increases

Well below-average cereal production harvested in 2022

Harvesting of the 2022 main winter grain crops concluded in mid-July. The country's cereal production is highly variable year on year depending on rainfall amounts and distribution. Local dams provide irrigation for only 15 percent of the agricultural land and rainfed agricultural production accounts for 85 percent of the aggregate output.

Following a good start of the rainy season, cumulative rainfall amounts between November 2021 and February 2022 were about half the average, causing widespread drought conditions across the country. Abundant rainfall amounts in March and April, up to 40 percent above the average in some areas, were too late to instigate a recovery in vegetation conditions as the cereal crops had already reached the grain filling stage.

As a result of the prolonged and widespread drought conditions, wheat production is estimated at about 2.5 million tonnes, over 55 percent below the five-year average and over 65 percent less than the exceptional production in 2021. Barley output in 2022 is estimated at 690 000 tonnes, one-third of the five-year average and about one-fourth of the 2021 harvest.

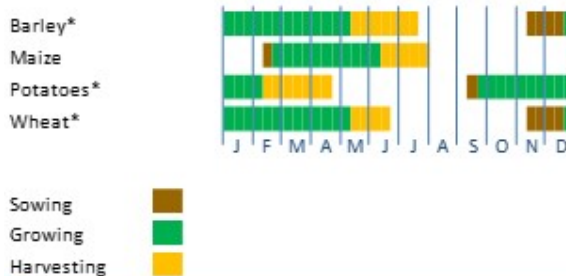
The government supports wheat production through the establishment of a reference price for purchasing local production, currently at MAD 3 000/tonne, up from MAD 2 800/tonne between 2017 and 2021. As of mid-June, the amount was equivalent to USD 300/tonne, down from USD 318/tonne in the previous season due to the weakening of the national currency. The government also provides a storage premium to farmers that decide to store wheat grain in licensed facilities.

To provide relief to livestock farmers, amidst high feed prices, the government announced an emergency distribution of 700 000 tonnes of subsidized barley in the regions most affected by the drought.

Morocco

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Morocco

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Wheat	5 712	7 540	2 500	-66.8
Barley	1 981	2 780	690	-75.2
Maize	82	100	30	-70.0
Others	102	93	98	4.8
Total	7 877	10 513	3 318	-68.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports to increase in 2022/23 owing to constrained domestic production

The country relies heavily on cereal imports to cover its consumption needs. The 2022/23 cereal import requirement is forecast at 10.4 million tonnes, about 35 percent more than the average import requirement in 2021/22. Wheat constitutes about 60 percent of the cereal imports. In the past, the European Union and Black Sea countries supplied most of the common “soft” wheat, although the share of Argentina and Brazil has been increasing. During the past four years, wheat imports from Ukraine and the Russian Federation were about 20 and 7 percent, respectively, of the total imports. Canada is the traditional supplier of “durum” wheat.

The country applies tariffs on wheat imports to protect local producers from international competition and revises the duties on a periodic basis depending on the domestic supply and demand situation. Usually import duties are set at the highest levels at harvest time. Since November 2021, import duties on the “soft” (common) and “durum” wheat have been suspended.

In February 2022, the *Office National Interprofessionnel des Céréales et des Légumineuses* (National Inter-Professional Office for Cereals and Legumes) reinstated a restitution system intended to keep “soft” (common) wheat prices below USD 270/tonne. Wheat importers are reimbursed the difference between a baseline wheat price, calculated every two weeks based on prices from four origins, and the target price of USD 270/tonne. The system was extended until the end of 2022.

Due to the excess milling capacity in the country, some quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

Food price inflation increases, amidst high international prices

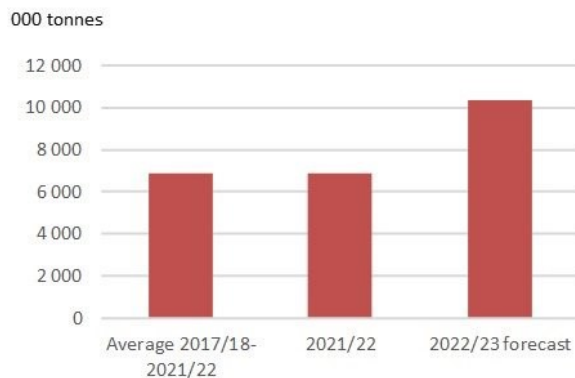
The country is dependent on grain and energy imports. As the world’s main exporter of phosphates, the value of its phosphate exports doubled in the first quarter 2022 compared to the same period in 2021, supported by high international fertilizer prices. However, increases in the net import bill for food and energy exceeded the gains from strong fertilizer prices, widening the trade balance.

In spite of the country’s high import dependency rate, the transmission of high international prices on domestic markets is mitigated by government subsidies. In May 2022, the annual food inflation rate was estimated at 8.6 percent, showing a slight decrease from the 9.4 percent recorded in the previous two months, but up from about 5 percent at the beginning of the year. Although relatively contained compared to other countries in the region, it is the highest level recorded since the beginning of the series in 2010. The general price inflation in May was estimated at 6 percent.

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Morocco

Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 02-August-2021

FOOD SECURITY SNAPSHOT

- Above-average cereal crop harvested in 2021
- Wheat imports expected to decrease in 2021/22 owing to ample domestic production
- Economy recovers, food price inflation remains low

Above-average cereal crop harvested in 2021

Harvesting of the 2021 main winter grain crops is about to be concluded under favourable weather conditions. Although cumulative rainfall amounts between September and December 2020 accounted only for two-thirds of the average, precipitations were adequately distributed over time and space to facilitate sowing and early crop development. Favourable rainfall since early January, with some areas receiving up to twice the average amounts, abundantly replenished moisture deficits across the country, with the only exception of some marginal producing regions in the northeast.

Overall, according to official sources, 2021 wheat production is estimated at about 7.2 million tonnes, about 50 percent above the average and almost three times more than the drought-stricken harvest in 2020. Barley output in 2021 is estimated at 2.6 million tonnes, almost four times the amount harvested in the previous year and over 60 percent above the five-year average. At 10 million tonnes, the 2021 cereal production exceeded the five-year average by over 60 percent. The country's cereal production is highly variable, with local dams providing irrigation for only 15 percent of the agricultural land and rainfed agricultural production accounting for 85 percent of the aggregate output.

The government supports wheat production through the establishment of a reference price for purchasing local wheat, maintained at MAD 2 800/tonne since 2017. Currently, the amount is equivalent to USD 318/tonne, up from USD 280/tonne in the previous season due to strengthening of the national currency. The government also provides a storage premium to farmers that decide to store wheat grain in licensed facilities.

Wheat imports expected to decrease in 2021/21 owing to ample domestic production

The country relies heavily on wheat imports to cover its consumption needs. After two consecutive years of drought, which increased the cereal import requirements in the 2020/21 marketing year (July/June) to 10.5 million tonnes, the 2021/22

Morocco

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Morocco

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	4 765	2 560	7 160	179.7
Barley	1 548	640	2 600	306.3
Maize	92	50	100	100.0
Others	99	105	103	-1.9
Total	6 504	3 355	9 963	197.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

cereal import requirement is forecast at an average level of 8 million tonnes, about 25 percent less than in 2020/21. The European Union and Black Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

The country applies tariffs on wheat imports to protect local producers from international competition and revises the duties on a periodic basis depending on the domestic supply and demand situation. Usually import duties are set at the highest levels at harvest time. In May 2021, the government increased common wheat import duties from 0 to 135 percent and durum wheat import duties from 0 to 170 percent.

Due to the excess milling capacity in the country, limited quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

Economy starts recovering and food price inflation remains low

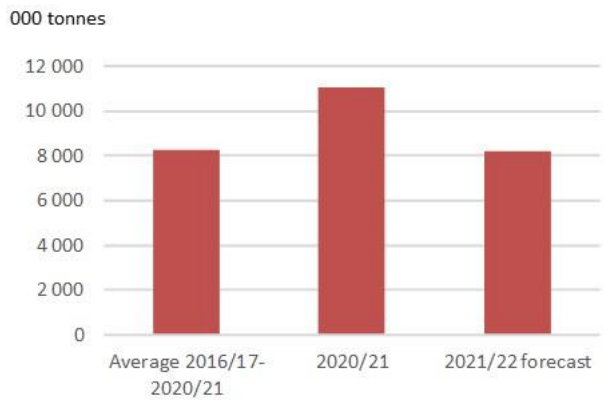
The economy contracted 7 percent year on year in 2020, mostly due to the impact of the COVID-19 pandemic containment measures on tourism, transportation services, manufacturing and construction, and reduced agricultural production due to drought. Although the tourism sector remains subdued, the Gross domestic product (GDP) in 2021 is expected to grow by 4.2 percent, supported by the recovery in the agricultural sector and some gradual improvements in manufacturing and service sectors.

The food price inflation in May 2021 (last data available) recorded a 1.5 percent increase on a yearly basis, up from the negative levels between November 2020 and March 2021. In the last five years, food inflation was very contained, ranging from a negative 3 percent to a positive 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by government subsidies.

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Morocco

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 15-October-2020

FOOD SECURITY SNAPSHOT

- Below-average cereal crop harvested in 2020
- Wheat imports expected to increase owing to below-average domestic production
- Economy contracts but food price inflation remains low

Below-average cereal crop harvested in 2020

Land preparation for sowing of the 2021 grain crops is currently ongoing under favourable weather conditions. Seasonal rains started in September with above-average amounts in most cropping areas. Winter wheat and barley crops will be sown from early November after the rains adequately replenish soil moisture.

Harvesting of the 2020 winter grains finished in July. The season was characterized by poor rainfall, both in terms of amount and distribution, coupled with high temperatures. Rains in late March and April 2020 proved to be too late for a production recovery of the winter grains that were already at filling to maturing stages. Farmers in the most drought-affected areas decided to let their livestock graze the fields instead of harvesting.

Overall, according to official estimates, about 2.56 million tonnes of wheat were harvested in 2020, a decrease of about 40 percent compared to the previous year's harvest and less than half of the five-year average. Barley output in 2020 amounted to 640 000 tonnes, almost 45 percent less in the previous year and less than one-third of the five-year average. At 3.32 million tonnes, the 2020 cereal production remained 60 percent short of the five-year average and 38 percent below the 2019 harvest. The 2020 harvest is the third lowest one on record in the last 20 years. The country's cereal production is highly variable, with local dams providing irrigation for only 15 percent of the agricultural land and rainfed agricultural production accounting for 85 percent of the aggregate output. The 2020 production estimates were based on a telephone survey of grain yields as travel restrictions imposed to contain the spread of the COVID-19 pandemic prevented the Ministry of Agriculture from carrying out field assessments.

The Government supports wheat production by establishing a reference price for purchasing local wheat (maintained at MAD 2 800 per tonne since 2017, equivalent to USD 280 per tonne) and by providing a storage premium to store wheat in licensed facilities.

Morocco

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Morocco

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	5 868	4 100	2 560	-37.6
Barley	2 099	1 161	640	-44.9
Maize	101	41	50	22.0
Others	99	95	74	-22.4
Total	8 167	5 397	3 324	-38.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Wheat imports to increase in 2020/21 owing to constrained domestic production

The country relies heavily on wheat imports to cover its consumption needs. A second consecutive year of drought increased the cereal import requirements in the 2020/21 marketing year (July/June) to 10.5 million tonnes, almost 20 percent more than in 2019/20 and about 30 percent above the average. The European Union and Black Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

The country traditionally applies tariffs on wheat imports to protect local producers from international competition and revises the duties on a periodic basis depending on the domestic supply and demand situation. Usually import duties are set at the highest levels at harvest time. In May 2020, the Government extended the exemption of the 35 percent import duty on soft wheat until 31 December 2020 with the aim to ensure regular flows of good quality wheat imports from the international market and prevent price hikes of non-subsidized wheat products.

Due to the excess milling capacity in the country, limited quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

No major disruptions in production activities as well as national and export agricultural supply chains due to the measures introduced to contain the spread of the COVID-19 pandemic were reported.

Economy contracts and food price inflation remains low

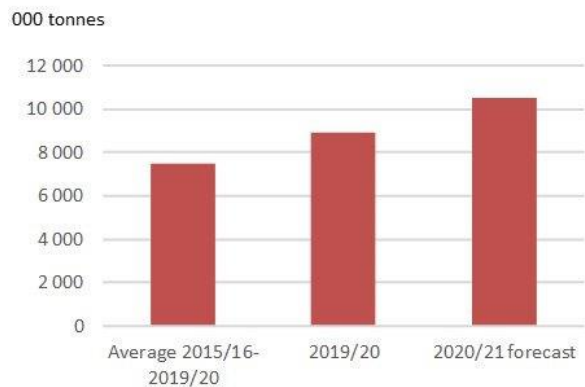
The economy contracted 14.9 percent year on year in the second quarter of 2020, compared to 0.1 percent in the first quarter, mostly due to the collapse of tourism and the seriously eroded transportation services, manufacturing and construction. A decrease in employment opportunities is likely to impact the purchasing power of informal sector workers in particular. Following the pandemic outbreak in March, the Government has been providing between USD 80 to USD 120 per month to the families in need. Special provisions were also introduced for formal employees who lost their jobs and are affiliated to the National Social Security Fund.

The food price inflation in August 2020 (last data available) recorded a 1.7 percent increase on a yearly basis. In the last five years, food inflation was very contained, ranging from a minus 3 to a positive 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies.

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Morocco

Cereals Imports



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Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 29-April-2020

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2020 crop due to production drought and high temperatures
- Wheat imports expected to increase owing to below-average domestic production
- Food price inflation remains low

Unfavourable prospects for 2020 crop production

Harvesting of the 2020 winter grains will start in the second half of May. Crop conditions in the southwestern parts of the country (including Marrakech-Safi and Casablanca-Settat regions) are poor due to the late onset of the rains that delayed plantings and drought conditions since the beginning of the year following below-average precipitation amounts coupled with high temperatures. While planting in northern Morocco and Oriental Region took place on time, dry weather conditions and high temperatures from January to March affected growth and decreased yield potential. Rains in late March and April proved to be too late for a production recovery for winter grains already at filling to maturing stages.

The total area of winter cereals to be harvested in 2020 is estimated at 3.8 million hectares, about 20 percent below the average of 4.7 million hectares. Local reports indicate that, given the low rainfall amounts and the general expectations of low yields, farmers refrained from mid-season application of plant protection materials and fertilizers. Farmers in the most affected areas have decided to let their livestock to graze the fields instead of harvesting.

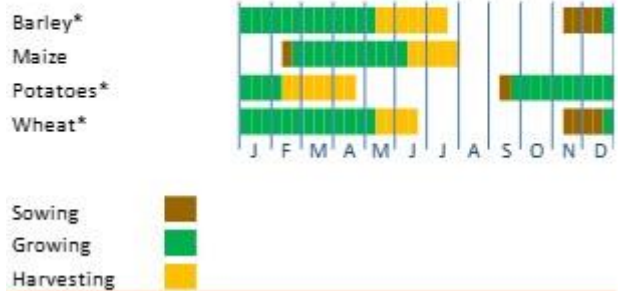
Preliminary forecasts point to a total cereal production of about 4.1 million tonnes, almost one-fourth lower than the previous year's already weather-stricken harvest and about 50 percent below average. Wheat production is expected to decrease from 4.1 million tonnes gathered last year to 3 million tonnes, a decline of almost 50 percent compared to the average.

To protect the livestock farmers affected by the drought, the Government announced a "Safeguard of Livestock Programme" which includes the distribution of 250 000 tonnes of subsidized barley feed.

Morocco

Crop Calendar

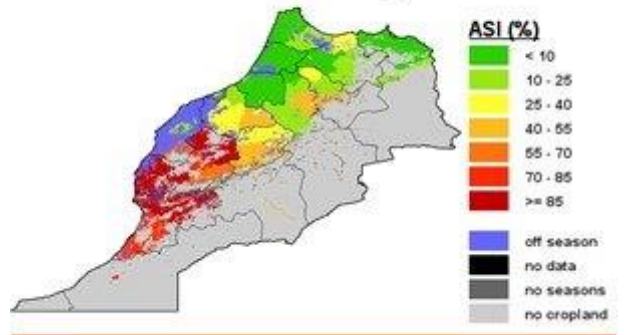
(*major foodcrop)



Source: FAO/GIEWS.

Morocco - Agricultural Stress Index (ASI)

from start of season 1 to Dekad 1, April 2020



Source: FAO/GIEWS Earth Observation System.

Wheat imports to increase in 2020/21 owing to constrained domestic production

The country relies heavily on wheat imports to cover its consumption needs. A second consecutive year of drought increased the cereal import requirements in the 2020/21 marketing year (July/June) to 9.4 million tonnes, about 7 percent more than in 2019/20 and almost 30 percent above average. The European Union and Black Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

The country traditionally uses tariffs on wheat imports to protect local producers from foreign competition and revises the duties on a periodic basis depending on the supply and demand situation in the country. Import tariffs for “soft” wheat have been suspended until 15 June 2020.

Due to the excess milling capacity in the country, limited quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

Food price inflation remains low

The food price inflation in March 2020 recorded a 3 percent decrease on a yearly basis. In the last five years, food inflation was very contained ranging from a negative 3 to a positive 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies. In 2019, some 600 000 tonnes of common wheat flour were subsidized, down from 650 000 tonnes subsidized in 2018. The “durum” wheat market is not regulated.

COVID-19 and measures adopted by the Government

The Government declared a “Health State of Emergency” on 20 March 2020 restricting the movement of people and closing non-essential public spaces. To support the informal sector workers, the Government is providing between USD 80 to USD 120 per month to the families in need. Special provisions were also introduced for formal employees affiliated with the National Social Security Fund who lost their jobs.

In addition to suspending customs duties on common wheat in response to unfavourable production prospects, starting from 1 April 2020, the Government suspended customs duties on durum wheat, lentils, chickpeas and beans to maintain the markets supplied in preparation for Ramadan.

No disruptions in national and export agricultural supply chains were reported.

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Morocco

Cereal Production

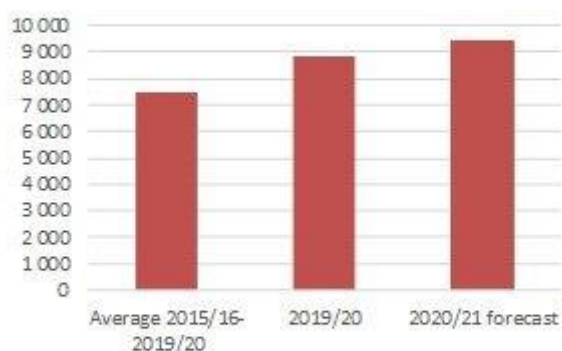
	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Wheat	5 868	4 100	3 000	-26.8
Barley	2 099	1 161	900	-22.5
Maize	101	41	50	22.0
Others	96	95	95	-0.4
Total	8 164	5 397	4 045	-25.1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Morocco

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 21-May-2019

FOOD SECURITY SNAPSHOT

- Spring drought constrained 2019 production prospects
- Wheat imports expected to increase owing to below-average domestic production
- Food price inflation remains low

Spring drought constrained 2019 production prospects

Harvesting of the 2019 winter grains will start in the second half of May and production prospects are not favourable. Above-average precipitation across the main growing areas between September and December provided abundant moisture for early planting in October and consequent emergence of wheat crops under favourable moisture conditions. However, rainfall deficits between January and March affected growth and decreased yield potential, particularly in the western and northern part of the country. Rains in April proved to be too late for a production recovery.

The total area planted with winter cereals in 2018 was 4.7 million hectares, close to 4.6 million hectares planted in the previous year. The utilization of certified seeds remained unchanged at 300 000 tonnes compared to the previous season. Local reports indicate that, given the low rainfall amounts and the general expectations of low yields, farmers refrained from mid-season application of plant protection materials and fertilizers.

The Government's preliminary forecasts from late April 2019 point to a cereal production of about 6.4 million tonnes, more than one-third lower than the previous year's exceptional harvest of 10.5 million tonnes and about 25 percent below average. Wheat production is expected to decrease from 7.3 million tonnes gathered last year to 4.9 million tonnes, a decline of almost 20 percent compared to the average.

The Government supports wheat production by establishing a reference price for purchasing local wheat (MAD 2 800 per tonne in 2019, unchanged from 2018, equivalent to USD 290 per tonne) and by providing a storage premium to store wheat in licensed facilities.

Morocco

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Morocco - NDVI anomaly

Relative difference to Long Term Average - Dekad 2, April 2019

Difference to LTA



Source: FAO/GIEWS Earth Observation System.

Wheat imports to increase in 2019/20 owing to constrained domestic production

The country relies heavily on wheat imports to cover its consumption needs. Cereal import requirements in the 2019/20 marketing year (July/June) are forecast at 8.2 million tonnes, almost 30 percent more than in 2018/19 and about 15 percent above average. Wheat imports are expected to increase from 3.3 million tonnes in 2018/19 to about 4.7 million tonnes to cover the shortfall in domestic production. The European Union and Black Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

The country traditionally uses tariffs on wheat imports to protect local producers from foreign competition and revises the duties on a periodic basis depending on the supply/demand situation in the country. Import tariffs for soft wheat were suspended from January to April 2019.

Due to the excess milling capacity in the country, limited quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

Food price inflation remains low

According to the last data available, the food price inflation in March 2019 recorded a 2.7 percent decrease on a yearly basis. In the last five years, food inflation was very contained ranging from a negative 3 to a positive 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies. In 2019, some 600 000 tonnes of common wheat flour were subsidized, down from 650 000 tonnes subsidized in 2018. The “durum” wheat market is not regulated.

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Morocco

Cereal Production

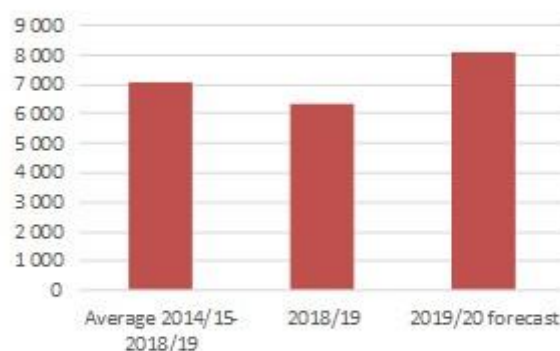
	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Wheat	6 071	7 342	4 900	-33.3
Barley	2 208	2 920	1 300	-55.5
Maize	111	109	109	0.0
Others	97	103	96	-6.8
Total	8 487	10 474	6 405	-38.8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Morocco

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 20-September-2018

FOOD SECURITY SNAPSHOT

- Near-record cereal production gathered in 2018
- Wheat imports expected to decrease in current marketing year owing to ample domestic production
- Food inflation remains low

Near-record cereal production gathered in 2018

Harvesting of the 2018 winter grains was completed in July. Despite the late offset of the rains, about 7.3 million tonnes of wheat were harvested in 2018, slightly above the previous year's harvest and 22 percent above the five-year average. Barley output in 2018 amounted to 2.9 million tonnes, about 17 percent more than in the previous year and over 30 percent above the five-year average. At 10.5 million tonnes, the 2018 cereal production exceeded the five-year average by almost 25 percent, but remained below the record-breaking cereal output of 11.8 million tonnes gathered in 2015.

Parts of the country experienced dry weather conditions in the autumn of 2017, which delayed plantings up to late December 2017. Abundant precipitation in the spring replenished soil moisture and improved yield prospects. The total area planted with winter cereals in 2017 was 4.6 million hectares, compared to 5.1 million hectares in 2016. The utilization of certified seeds in the most recent crop season increased by over 100 000 tonnes to 300 000 tonnes compared to the previous season, driven by increased use of certified durum wheat and barley seeds.

The Government supports wheat production by establishing a reference price for purchasing local wheat (MAD 2 800 per tonne in 2018, equivalent to USD 299 per tonne) and by providing a storage premium to store wheat in licensed facilities.

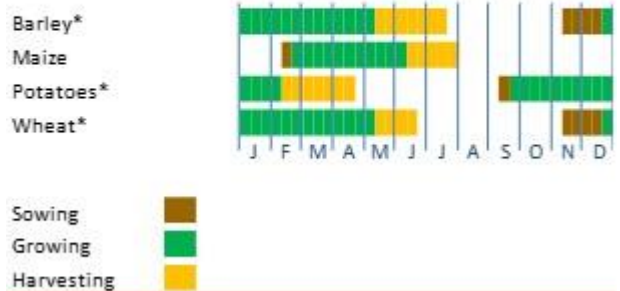
Wheat imports to decrease in 2018/19 owing to ample domestic production

The country relies heavily on wheat imports to cover its consumption needs. Cereal import requirements in the 2018/19 marketing year (July/June) are forecast at 6.4 million tonnes, 8 percent less than in 2017/18, of which wheat imports would account for about 3.2 million tonnes. European Union and Black Sea countries supply most of the common "soft" wheat, while Canada is the traditional supplier of "durum" wheat.

Morocco

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Morocco

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
				percent
Wheat	5 991	7 100	7 330	3.2
Barley	2 176	2 500	2 920	16.8
Maize	116	140	110	-21.4
Others	97	102	103	1.0
Total	8 379	9 842	10 463	6.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

In May 2018, the Government announced the increase of the import duty on “soft” wheat from 30 to 135 percent, effective until 31 October 2018. The country has traditionally used tariffs on wheat imports to protect local producers from foreign competition and revised the duties on a periodic basis depending on the supply/demand situation in the country.

Due to the excess milling capacity in the country, limited quantities of wheat flour, couscous and pasta are exported to neighbouring countries.

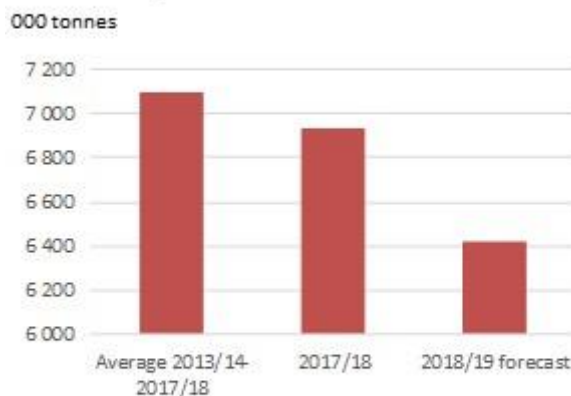
Food inflation remains low

According to the last data available, the food inflation in July 2018 recorded a 1.8 percent decrease on a yearly basis. In the last five years, food inflation was very contained ranging from a negative 3 to a positive 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of some 650 000 tonnes of the “national flour”, a common wheat of standard quality used to make flour for the low-income consumers. “National flour” is currently marketed at MAD 2 588 per tonne in 2018, equivalent to USD 277 per tonne. The Government covers the difference between the actual price and the guaranteed milling price. The “durum” wheat market is not regulated.

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Morocco

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Morocco

Reference Date: 30-October-2017

FOOD SECURITY SNAPSHOT

- Above-average cereal production gathered in 2017
- Wheat imports to decrease in current marketing year owing to ample domestic production
- Food inflation remains negative

Above-average cereal production gathered in 2017

Land preparation for sowing of the 2018 grain crop is currently underway under favourable weather conditions. Winter wheat and barley will be sown from early November.

Harvesting of the 2017 winter grains finished in July. While parts of the country experienced dry weather conditions up to mid-November 2016, which delayed plantings in some areas, good precipitation later in the season replenished soil moisture, improving yield prospects. The total area planted with winter cereals in the 2017/18 marketing season was 5.11 million hectares, compared to 3.6 million hectares in the previous year.

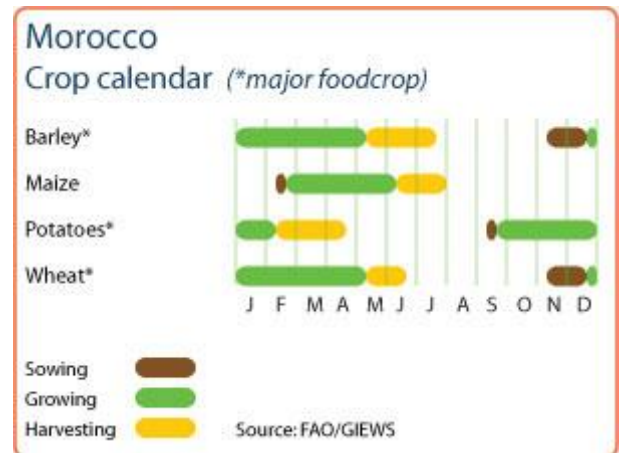
Overall, some 7.1 million tonnes of wheat were harvested in 2017, an increase of over 163 percent compared to the previous year's weather-stricken harvest and 33 percent above the five-year average. Barley output in 2017 amounted to 2.5 million tonnes, four times as much as in the previous year and 30 percent above the five-year average. At 9.9 million tonnes, the 2017 cereal production exceeded the five-year average by over 30 percent, but remained 14 percent short of the record-breaking cereal output of 11.8 million tonnes gathered in 2015.

The Government supports wheat production by establishing a reference price for purchasing local wheat (MAD 2 800 per tonne in 2017, equivalent to USD 286 per tonne) and by providing a storage premium to store wheat in licensed facilities.

Being largely rainfed, country's cereal production is highly variable. Local dams cover only 15 percent of agricultural land, with rainfed agricultural production accounting for 85 percent of aggregate output.

Wheat imports to decrease in 2017/18 owing to ample domestic production

The country relies heavily on wheat imports to cover its consumption needs. Cereal import requirements in 2017/18



Morocco
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	5 324	2 700	7 100	163
Barley	1 932	600	2 500	317
Maize	127	165	165	0
Others	104	87	106	22
Total	7 487	3 552	9 871	178

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

(July/June) are forecast at 7.7 million tonnes, 7 percent down on 2016/17, of which wheat imports would account for about 4.5 million tonnes. European Union and Black Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

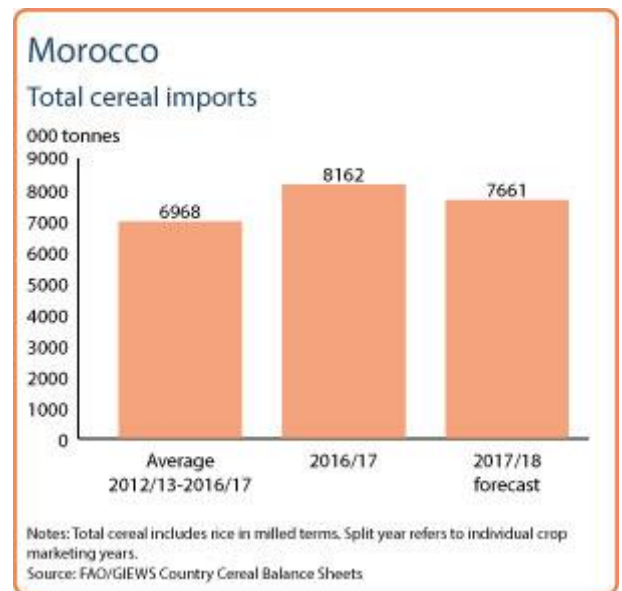
In May 2017, the Government announced the increase of the import duty on “soft” wheat from 30 percent to 135 percent. The customs duty will last until 31 December 2017. The country has traditionally used tariffs on wheat imports to protect local producers from foreign competition and revises the duties on a periodic basis depending on the supply/demand situation in the country.

Due to excess milling capacity in the country, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains negative

According to the last data available, the food inflation in September 2017 recorded a 0.7 percent decrease on a yearly basis. Food inflation has been negative since March 2017. In 2016, food inflation ranged from 0 to 4 percent. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of some 650 000 tonnes of the “national flour”, a common wheat of standard quality used to make flour for the low income consumers. The amount of subsidized flour decreased in June 2017, down from 1 million tonnes subsidized in 2016. The Government covers the difference between the actual price and the guaranteed milling price. The “durum” wheat market is not regulated.

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GIEWS Country Brief Morocco

Reference Date: 10-May-2017

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2017 winter grain harvest
- Wheat imports increased in current marketing year but expected to decline in 2017/18
- Food inflation remains moderate

Favourable prospects for 2017 winter grain harvest

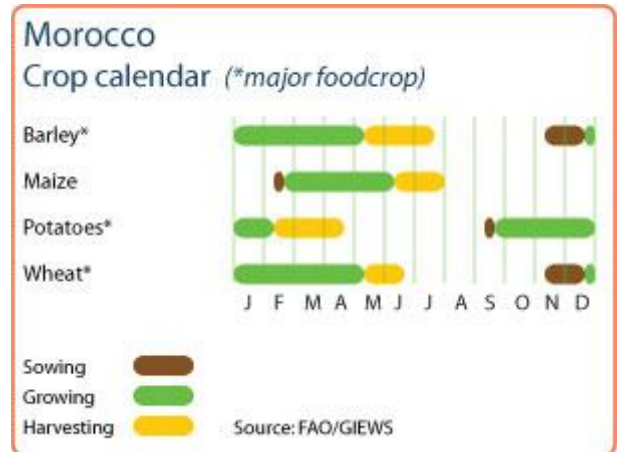
Harvesting of the 2017 winter grains will start shortly. Unlike in 2016 when only 2.7 million tonnes of wheat and 600 000 tonnes of barley were harvested mainly due to poor and erratic rains, prospects for the 2017 harvest look very promising. While parts of Morocco suffered from autumn drought up to mid-November 2016, which delayed plantings in some areas, good precipitation later in the season replenished soil moisture, improving yield prospects. The total area planted with winter cereals in the current season is 5.11 million hectares, compared to 3.6 million hectares in the previous year.

Being largely rainfed, cereal production in Morocco is highly variable. Moroccan dams cover only 15 percent of its agricultural land, with rainfed agricultural production accounting for 85 percent of aggregate output.

Wheat imports increased in 2016/17 owing to limited domestic production but expected to decrease in 2017/18

Morocco relies heavily on wheat imports to cover its consumption needs. Morocco's cereal imports in 2016/17 (July/June) are forecast at 9.1 million tonnes, 23 percent up on 2015/16, of which wheat imports account for about 5 million tonnes. A larger increase in import requirements was limited by ample carryover stocks from the previous year's above-average harvest, European Union and Black Sea countries supply most of the common "soft" wheat, while Canada is the traditional supplier of "durum" wheat. In 2017/18, owing to a favourable domestic harvest, imports are foreseen to decline.

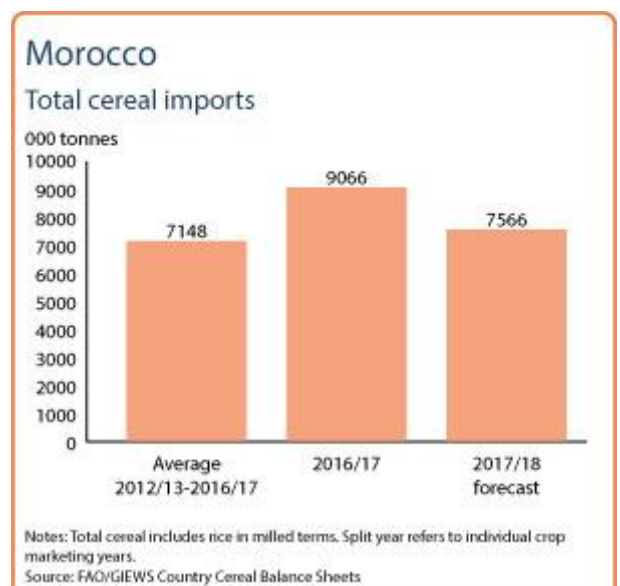
In May 2017, the Government announced the increase of the import duty on "soft" wheat from 30 percent to 135 percent. The customs duty will become effective upon publication in the official bulletin and will last until 31 December 2017. Morocco has traditionally used tariffs on wheat imports to protect local producers from foreign competition and revises the duties on a



Morocco
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	5,324	2,700	7,000	159
Barley	1,932	600	2,800	367
Maize	127	165	165	0
Others	107	92	106	15
Total	7,491	3,557	10,071	183

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



periodic basis depending on the supply/demand situation in the country.

Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

In March 2017 (the last data available), the food inflation recorded a 1.8 percent decrease on a yearly basis. In 2016, food inflation ranged from 0 to 4 percent. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of more than 1 million tonnes of the "national flour", a common wheat of standard quality used to make flour for the low income consumers. The Government covers the difference between the actual price and the guaranteed milling price. The "durum" wheat market is not regulated.

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GIEWS Country Brief Morocco

Reference Date: 21-September-2016

FOOD SECURITY SNAPSHOT

- **Widespread drought resulted in 70 percent drop in cereal production compared to last year's harvest**
- **Wheat imports expected to increase in current marketing year**
- **Food inflation remains moderate**

Below-average cereal crop harvested in 2016

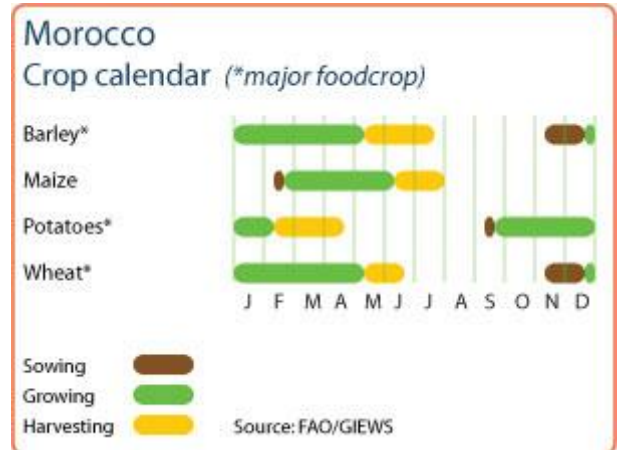
Harvesting of the 2016 winter grains was completed in July. Only 2.7 million tonnes of wheat and 600 000 tonnes of barley were harvested compared to 8 and 3.5 million tonnes, respectively, in 2015. This decrease is mainly due to poor rains that delayed planting activities, reduced the area sown and significantly restricted yields. After a favourably wet start of the winter season in October 2015, significant precipitation deficits built up from November in several parts of Morocco, reaching 80 percent by January 2016 in some areas. Erratic spring rains in February and March were not sufficient to significantly improve soil moisture and crop conditions. Some wheat farmers switched to cultivating sunflower instead of wheat.

Being largely rainfed, cereal production in Morocco is highly variable. Morocco dams cover only 15 percent of its agricultural land, with rainfed agricultural production accounting for 85 percent.

The Government has allocated MAD 4.5 billion (approximately USD 452 million) to mitigate the effects of the rainfall deficit focusing on three main areas, including support to livestock. The barley subsidy programme plans to supply 800 000 tonnes of barley to livestock producers at fixed subsidized prices of MAD 2 per kg. The Government also supports the transport of this barley to remote areas. In addition, a potential compensation in the framework of a climate multi risk insurance for cereal and spring crops of around MAD 1.25 billion (approximately USD 126 million) is also considered.

Wheat imports expected to increase in 2016/17 owing to limited domestic production

Morocco relies heavily on wheat imports to cover its consumption needs. Morocco's cereal imports in 2016/17 (July/June) are forecast at 8.8 million tonnes, 18 percent up on 2015/16, of which wheat imports account for about 5 million tonnes. A larger increase in import requirements was limited by ample carryover stocks from last year's above-average harvest, EU and Black



Morocco Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes		percent	
Wheat	5 998	8 000	2 700	-66
Barley	2 288	3 500	600	-83
Maize	161	165	165	0
Others	94	92	92	0
Total	8 541	11 757	3 557	-70

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

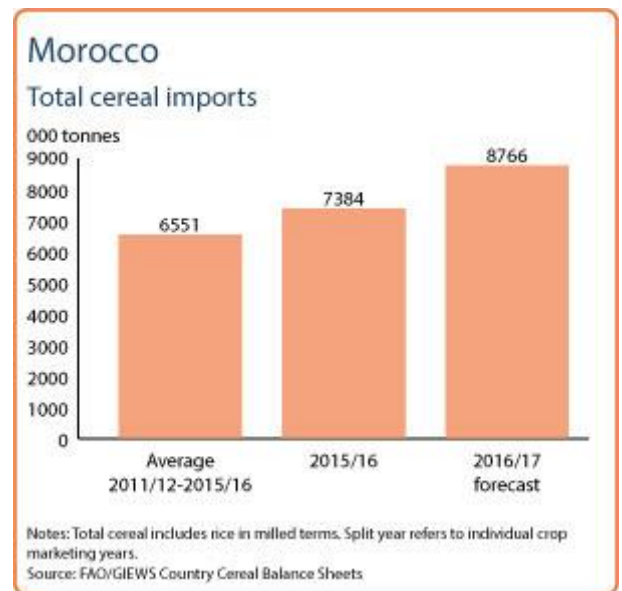
Sea countries supply most of the common “soft” wheat, while Canada is the traditional supplier of “durum” wheat.

In June 2016, the Government announced that the common wheat import tariff would be increased to 65 percent (from the previous level of 30 percent, valid from December 2015) to stabilize the domestic price at MAD 2 800–2 850 per tonne (around USD 290).

Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

In July 2016 (the last data available), food inflation recorded a 3 percent increase on yearly basis, compared to the negative rates recorded earlier in the year. In spite of the country’s high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of more than 1 million tonnes of the “national flour”, a common wheat of standard quality used to make flour for the low income consumers. The Government covers the difference between the actual price and guaranteed mill price. “Durum” wheat market is not regulated.



Reference Date: 15-March-2016

FOOD SECURITY SNAPSHOT

- Widespread drought decreasing production potential
- Above-average cereal harvest gathered in 2015 following timely and abundant rains
- Wheat imports expected to decrease in current marketing year
- Food inflation remains moderate

Widespread drought decreasing production potential

Planting of the 2016 winter grains started in mid-November and concluded at the end of December. After a favourably wet start of the winter season in October, significant precipitation deficits have built up from November 2015 in several parts of Morocco, reaching 80 percent by January 2016 in some areas. Large swathes of land normally planted to cereals have been adversely affected by drought conditions. In addition, above-average temperatures have exacerbated the impact of rainfall deficits on crop development.

Widespread rains in the last decade of February 2016 improved soil moisture conditions. Improved rainfall during the remainder of the season would partly mitigate the negative impact of early seasonal dryness but would not lead to a full production recovery.

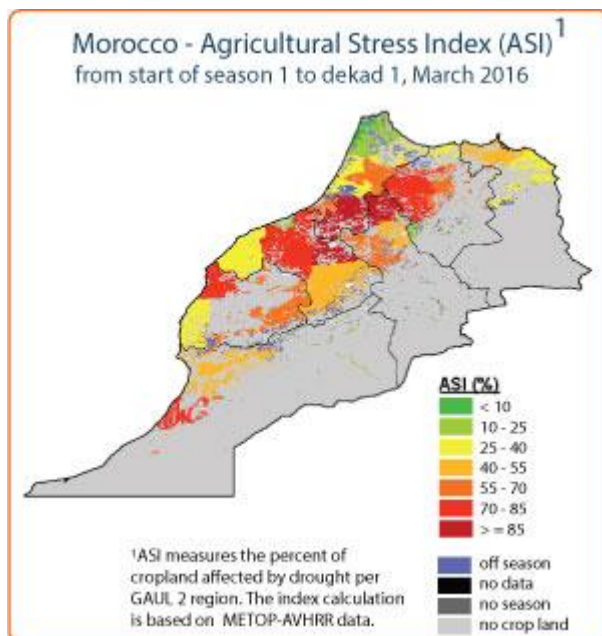
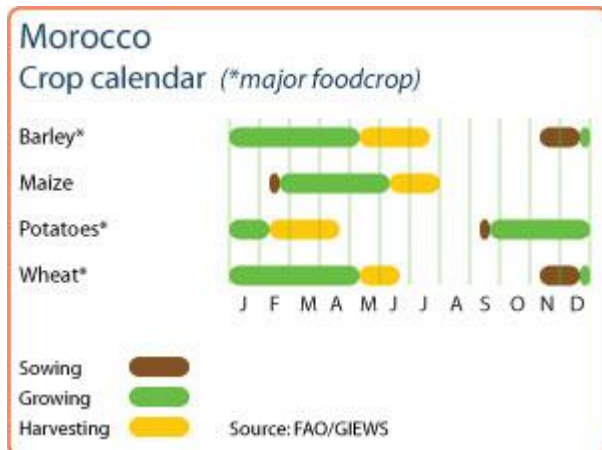
Being largely rainfed, cereal production in Morocco is highly variable. Morocco dams cover only 15 percent of its agricultural land with rainfed agricultural production accounting for 85 percent.

The Government has allocated MAD 4.5 billion to mitigate the effects of the rainfall deficit focusing on three main areas, including support to livestock. Barley subsidy programme plans to supply 800 000 tonnes of barley to farmers at fixed subsidized prices of 2 dirhams per kg. The Government also supports the transport of this barley to remote areas. In addition, a potential compensation in the context of climate multi-risk insurance for cereal and spring crops of around MAD 1.25 billion is also considered.

Above-average cereal crop harvested in 2015

Owing to favourable weather conditions with timely and locally-abundant rains, about 8 million tonnes of wheat were harvested in 2015, a 57 percent increase compared to the 2014 weather-stricken harvest. The total barley harvest, used mostly as feed, reached 3.5 million tonnes, about 106 percent higher than the previous year and some 65 percent above the five-year average.

As part of the Plan Maroc Vert agricultural strategy, the Government continues to implement measures supporting cereal production. Measures include establishing a reference price for local wheat purchases, storage premium as well as subsidies for certified seeds (MAD 500 per tonne), farm machinery purchases (20 to 50 percent of the cost), irrigation equipment (ranging from 50 to 70 percent of the



Morocco Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	5 375	5 100	8 000	57
Barley	2 102	1 700	3 500	106
Maize	168	165	165	0
Others	94	91	92	1
Total	7 740	7 056	11 757	67

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

cost) and soil testing to optimize fertilizer application. Agricultural insurance schemes are also supported.

Wheat imports expected to decrease in 2015/16 owing to ample domestic production

Morocco relies heavily on wheat imports from the international market to cover its consumption needs. Morocco's cereal imports in 2015/16 (July/June) are forecast at 5 million tonnes, 30 percent down on 2014/15, of which wheat imports account for about 2 million tonnes. EU and Black Sea countries supply most of the common (soft) wheat, while Canada is the traditional supplier of durum wheat.

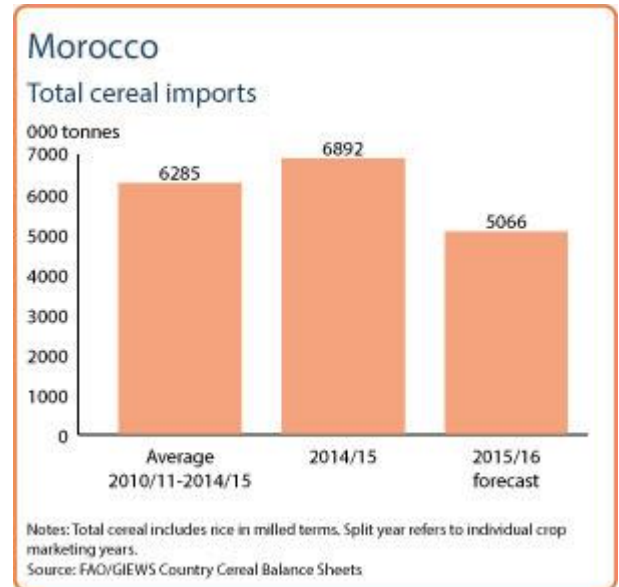
As of 1 January 2016, Morocco estimated a total stock of soft wheat at 760 000 tonnes, durum wheat at 105 000 tonnes and barley at 102 000 tonnes. These stocks will cover domestic demand only through March, speeding up the rate of imports.

In December 2015, the Government announced that the common wheat import tariff would be decreased to 30 percent (from the previous level of 50 percent, valid from October 2015) to maintain a reference target price of MAD 2 600 per tonne beginning from 1 January 2016.

Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

In January 2016 (the last data available), food inflation recorded a decline of 0.2 percent on yearly basis, a slight increase from a negative 1.3 percent in November 2015. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of more than 1 million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference between the actual price and guaranteed mill price. Durum wheat market is not regulated.



Reference Date: 14-December-2015

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest gathered in 2015 following timely and abundant rains
- Wheat imports expected to decrease
- Food inflation remains moderate

Planting of the 2016 winter grains started in mid-November and should conclude by the end of December. After a favourably wet start of the winter season in October, a short-term dryness persisted across the country's growing regions, reducing top soil moisture for winter grain establishment.

Above-average cereal crop harvested in 2015

Harvesting of 2015 winter grains was concluded in mid-July. Being largely rainfed, cereal production in Morocco is highly variable. Favourable weather conditions with timely and locally abundant rains maintained good yield prospects. While in early May excessively hot weather prevailed in the region and threatened grain filling, winter crops in Morocco were generally unaffected by the heat as crops were already matured or approaching maturity.

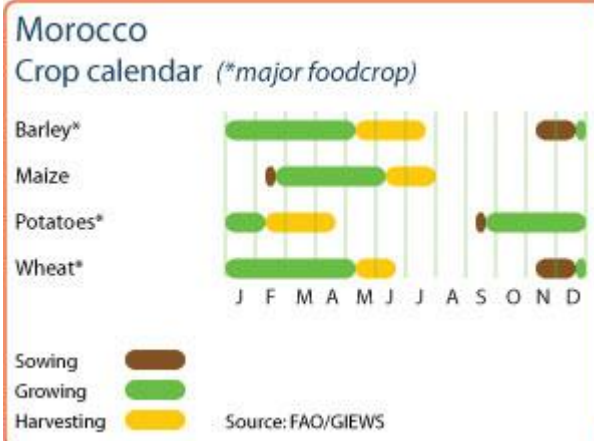
About 8 million tonnes of wheat were harvested, a 57 percent increase compared to the 2014 weather-stricken harvest as well as the above average. Total barley harvest, used mostly as feed, reached 3.5 million tonnes, about 106 percent higher than last year and some 65 percent above the five-year average.

As part of the Plan Maroc Vert agricultural strategy, the Government continues to implement measures supporting cereal production. Measures include establishing a reference price for local wheat purchases, storage premium as well as subsidies for certified seeds (MAD 500 per tonne), farm machinery purchases (20 to 50 percent of the cost), irrigation equipment (ranging from 50 to 70 percent of the cost) and soil testing to optimize fertilizer application. Agricultural insurance schemes are also supported.

Wheat imports expected to decrease in 2015/16 owing to ample domestic production

Morocco relies heavily on wheat imports from the international market to cover its consumption needs. Morocco's cereal imports in 2015/16 (July/June) are forecast at 4.9 million tonnes, 30 percent down on 2014/15, of which wheat imports account for about 2 million tonnes. EU and Black Sea countries supply most of the common (soft) wheat, while Canada is the traditional supplier of durum wheat.

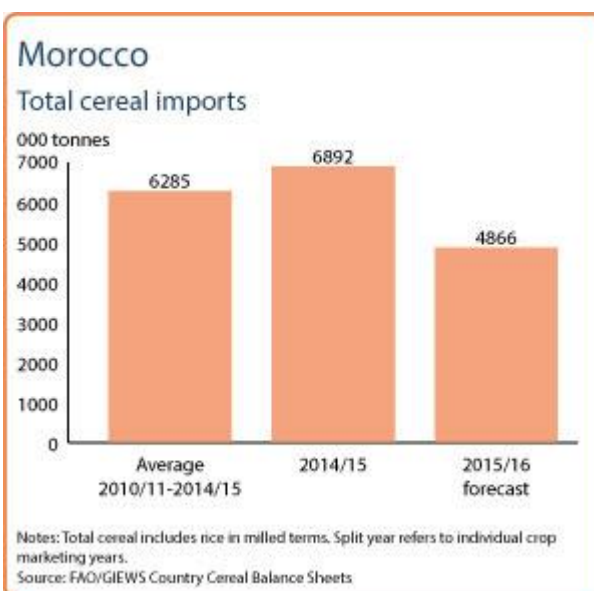
In October 2015, the Government announced that the common wheat import tariff would be decreased to 50 percent for the price band up to MAD 1 000 per tonne (from the previous level of 75 percent, valid from May 2015) and 2.5 percent for the price band above MAD 1 000 per tonne, beginning from 1 November 2015. Durum wheat imports are subject to 2.5 percent duty.



Morocco
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	5 375	5 100	8 000	57
Barley	2 102	1 700	3 500	106
Maize	168	165	165	0
Others	94	91	92	1
Total	7 740	7 056	11 757	67

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

In October 2015 (the last data available), food inflation increased by 3.4 percent on yearly basis, a slight increase from 2.5 percent in May 2015. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of more than 1 million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference between the actual price and guaranteed mill price. Durum wheat is not regulated.

Reference Date: 2-June-2015

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest forecast in 2015 following timely and abundant rains
- Despite below-average 2014 crop, wheat imports seen lower in just ending 2014/15 marketing year (July/June) due to high carryover stocks
- Food inflation remains moderate

Above-average cereal harvest forecast in 2015

Harvesting of 2015 winter grains started in mid-May and will continue until mid-July. Being largely rainfed, cereal production in Morocco is highly variable. Favourable weather conditions with timely and locally abundant rains maintained good yield prospects. While in early May excessively hot weather prevailed in the region and threatened grain filling, winter crops in Morocco were generally unaffected by the heat as crops were already matured or approaching maturity. Beginning of the harvest coincided with a series of unseasonable showers and thunderstorms which hampered early harvesting.

The preliminary forecast indicates wheat production of 7 million tonnes, well above average, as well as, last year when dry conditions in autumn 2013 slowed down wheat planting and despite generally favourable weather conditions later in the season, yields were not sufficient to offset the area reduction. Total barley harvest, used mostly as feed, is forecast at 2.5 million tonnes, about 47 percent higher than last year and some 20 percent above the five-year average.

As part of the Maroc Vert agricultural strategy, the Government continues to implement measures supporting cereal production. Measures include establishing a reference price for local wheat purchases, storage premium as well as subsidies for certified seeds, farm machinery purchases, irrigation equipment (ranging from 30 to 70 percent of cost) and soil testing to optimise fertiliser application.

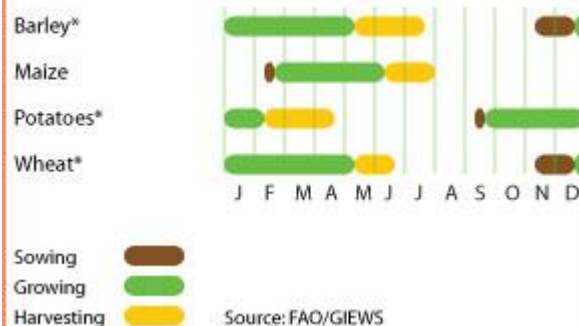
Wheat imports expected to decrease in 2014/15 due to high carryover stocks

Morocco relies heavily on wheat imports from the international market to cover its consumption needs. Morocco's cereal imports in 2014/15 (July/June) are forecast at 5.9 million tonnes, 9 percent down on 2013/14, of which wheat imports account for 3.3 million tonnes. EU and Black Sea countries supply most of the common (soft) wheat, while Canada is the traditional supplier of durum wheat. Lower import forecast is supported by higher carryover stocks, despite the below-average 2014 harvest.

The Attijariwafa Bank, one of Morocco's three major banks, signed a deal with Moroccan wheat trade federation to finance USD 300 million of Russian wheat imports in the 2014/15 season. Morocco typically imports from October to May (the start of the local harvest). However, wheat importers are seeking to establish a longer window for imports to take advantage of Black Sea exporters offloading large volumes at attractive prices at the start of the international marketing year in July.

Morocco

Crop calendar (*major foodcrop)



Morocco

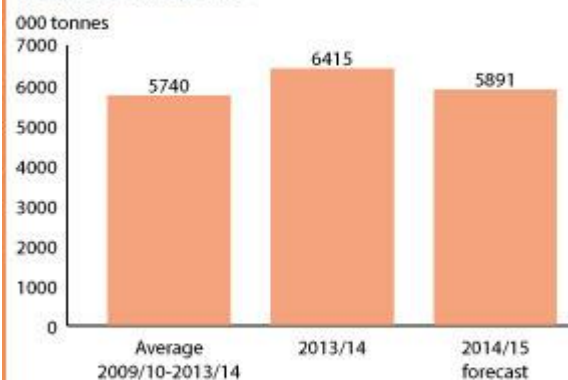
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	5 375	5 100	7 000	37
Barley	2 102	1 700	2 500	47
Maize	168	165	165	0
Others	94	91	92	1
Total	7 740	7 056	9 757	38

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

In April 2015, the Government announced that the common wheat import tariff would be increased to 75 percent (from the current level of 17.5 percent) beginning from 1 May 2015.

Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

In April 2015 (the last data available), food inflation increased by 2.5 percent on yearly basis. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by Government subsidies of more than 1 million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference between the actual price and guaranteed mill price. Durum wheat is not regulated.

The Government removed fuel subsidies in February 2014, narrowing the fiscal deficit from MAD 36.9 billion (USD 4.4 billion) in June 2013 to MAD 23.6 billion in June 2014. A reform of food subsidies remains unlikely.

Reference Date: 25-August-2014

FOOD SECURITY SNAPSHOT

- Below-average cereal harvest in 2014 following inadequate soil moisture in the southern—most parts
- Wheat imports expected to decrease in 2014/15
- Food inflation remains moderate

Below-average cereal harvest gathered in 2014

The 2014 grain harvest is concluded. Being largely rainfed, cereal production in Morocco is highly variable. Dry conditions in autumn 2013 slowed down wheat planting. Compared to previous year, about 15 percent less land was planted to cereals. Despite generally favourable weather conditions later in the season, yields were not sufficient to offset the area reduction.

The Ministry of Agriculture puts a preliminary cereal production forecast in 2014 at about 7 million tonnes, some 29 percent below the last year's exceptionally high harvest, and 16 percent below the five-year average. Total wheat harvest is put at 5.1 million tonnes, some 10 percent below the five-year average and 27 percent below last year. Total barley harvest, used mostly as feed, is forecast at 1.7 million tonnes, about 37 percent lower than last year and some 32 percent below the five-year average.

Wheat imports expected to decrease in 2014/15 due to high carry-over stocks

Morocco relies heavily on wheat imports from the international market to cover its consumption needs. Morocco's cereal imports in 2014/15 (July/June) are forecast at 6.275 million tonnes, 7 percent down on 2013/14, of which wheat imports account for 3.5 million tonnes. EU and Black Sea countries supply most of the common (soft) wheat while Canada is the traditional supplier of durum wheat. Lower import forecast is supported by higher carry-over stocks, despite the below-average 2014 harvest.

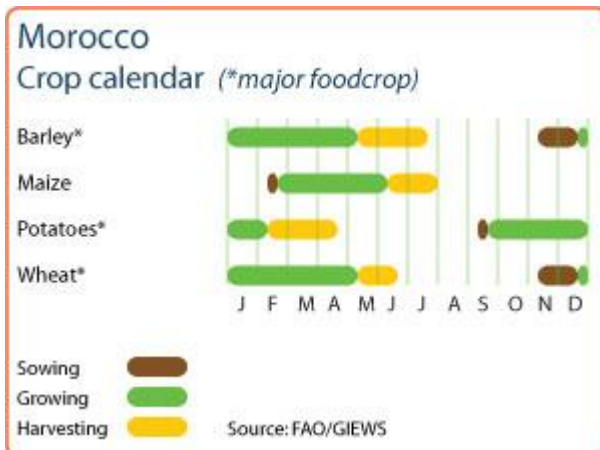
The Attijariwafa Bank, one of Morocco's three major banks, signed a deal with Moroccan wheat trade federation to finance USD 300 million of Russian wheat imports in the 2014/15 season. Morocco typically imports from October to May (the start of the local harvest). However, wheat importers are seeking to establish a longer window for imports to take advantage of Black Sea exporters offloading large volumes at attractive prices at the start of the international marketing year in July.

In July 2014, the government announced that the common wheat import tariff would be lowered to 17.5 percent (from the current level of 45 percent) beginning from 1 September 2014.

Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

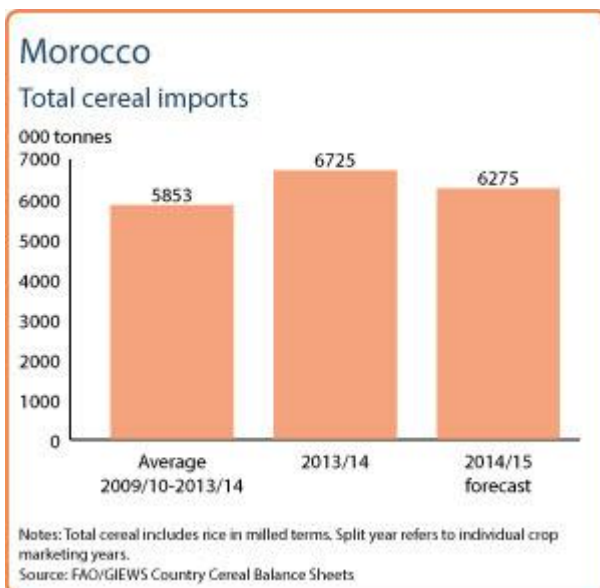
The food inflation stood at 0.2 percent in the 12 months to the end of December 2013. In April 2014 (the last data available), there was no



Morocco Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	5 635	7 000	5 100	-27
Barley	2 522	2 700	1 700	-37
Maize	165	159	165	4
Others	102	113	114	1
Total	8 424	9 972	7 079	-29

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



change reported in food indices compared to a year ago. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by government subsidies of more than 1 million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference between the actual price and guaranteed mill price. Durum wheat is not regulated.

The Government removed fuel subsidies in February 2014, narrowing the fiscal deficit from MAD 36.9bn (USD 4.4bn) in June 2013 to MAD 23.6bn in June 2014. A reform of food subsidies remains unlikely.

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Above average cereal harvest in 2013 following timely and adequate rainfall
- Wheat imports expected to decrease in 2013/14
- Food inflation remains moderate

Planting of the 2014 winter grains is concluded. Winter grain prospects are mostly favourable, although a lack of soil moisture remains a concern in southern-most portions of the country. Being largely rain-fed, cereal production in Morocco is highly variable.

Above average cereal harvest gathered in 2013

The Ministry of Agriculture's preliminary cereal production forecast in 2013 was put at almost 10 million tonnes, 30 percent above the five-year average and some 87 percent above last year's drought affected, exceptionally low harvest. The largest ever cereal harvest of 10.4 million tonnes was gathered in 2009. At 7 million tonnes, the total wheat harvest was some 40 percent above the five-year average and 81 percent above last year. The barley harvest, used mostly as feed, reached 2.7 million tonnes, 125 percent increase compared to last year and some 20 percent above the five-year average. Favourable weather also improved conditions of pastures, reducing demand for feed barley.

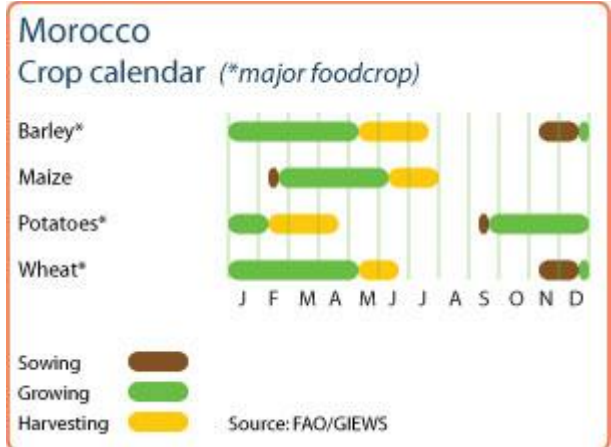
The Government has taken various measures to improve yields, including the provision of certified seeds (at 40-60 percent of the cost), subsidies for farm machinery and irrigation equipment (30-70 percent of the purchase cost), and subsidies for soil testing to optimise fertiliser application. The cultivated area covered by crop insurance, with 50 to 90 percent of insurance premiums subsidised, was planned to increase from 300 000 hectares in 2012 to 500 000 hectares in 2013. The projection is to cover 1 million hectares in 2015.

Wheat imports expected to decrease in 2013/14

Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to rainfall variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Morocco's cereal imports in 2013/14 are forecast at 4.7 million tonnes, 22 percent down on 2012/13. Wheat imports account for 2 million tonnes of this total. EU and Black Sea countries supply most of the common (soft) wheat while Canada is the traditional supplier of durum wheat. Due to excess milling capacity in Morocco, limited quantities of wheat flour are exported to neighbouring countries.

Food inflation remains moderate

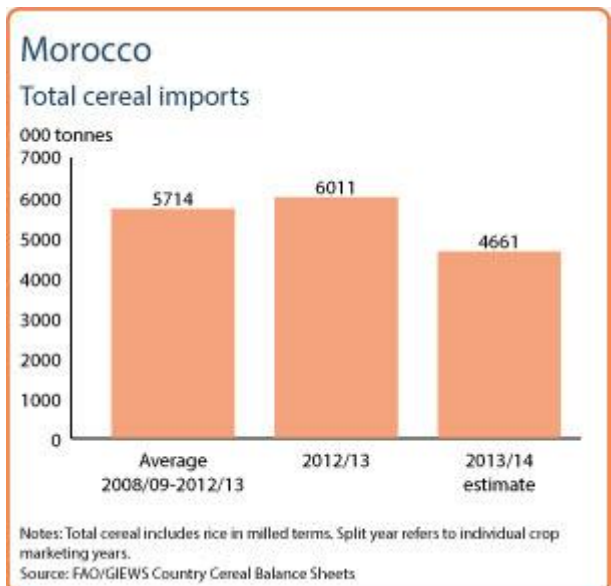
The food inflation stood at 0.7 percent in the 12 months to the end of December 2013. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by government subsidies of more than one million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference



Morocco
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Wheat	4 989	3 870	7 000	81
Barley	2 253	1 200	2 700	125
Maize	158	149	159	7
Others	96	112	113	1
Total	7 496	5 331	9 972	87

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



between the actual price and guaranteed mill price (MAD 2 600/tonne as of April 2013). Durum wheat is not regulated.

Reference Date: 08-August-2013

FOOD SECURITY SNAPSHOT

- Above average cereal harvest in 2013 following timely and adequate rainfall
- Wheat imports expected to decrease in 2013/14
- Food inflation remains moderate

Above average cereal harvest forecast

The 2013 grain harvest is concluded. Being largely rain-fed, cereal production in Morocco is highly variable. Owing to favourable weather conditions, timely and adequate rainfall in the most of the grain producing region, an above average cereal harvest is forecast.

The Ministry of Agriculture's preliminary cereal production forecast in 2013 is put at almost 10 million tonnes, 30 percent above the five-year average and some 87 percent above last year's drought affected, exceptionally low harvest. The largest ever cereal harvest of 10.4 million tonnes was gathered in 2009. The total wheat harvest is put at 7 million tonnes, some 40 percent above the five-year average and 81 percent above last year. The barley harvest, used mostly as feed, is forecast at 2.7 million tonnes, 125 percent increase compared to last year and some 20 percent above the five-year average. Favourable weather also improved conditions of pastures, reducing demand for feed barley.

The Government has taken various measures to improve yields, including the provision of certified seeds (at 40-60 percent of the cost), subsidies for farm machinery and irrigation equipment (30-70 percent of the purchase cost), and subsidies for soil testing to optimise fertiliser application. The cultivated area covered by crop insurance, with 50 to 90 percent of insurance premiums subsidised, was planned to increase from 300 000 hectares in 2012 to 500 000 hectares in 2013. The projection is to cover 1 million hectares in 2015.

Wheat imports expected to decrease in 2013/14

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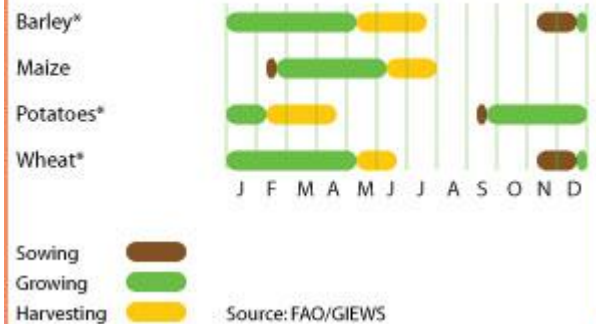
To protect prices in the local market, the Government in early August 2013 announced raising its customs duty for imports of soft wheat from 17 to 45 percent. Wheat stocks, as of 15 July 2013, stood at 2.1 million tonnes, covering five months of soft wheat consumption.

Food inflation remains moderate

The food inflation rose 3.2 percent in the 12 months to the end of June

Morocco

Crop calendar (*major foodcrop)



Morocco

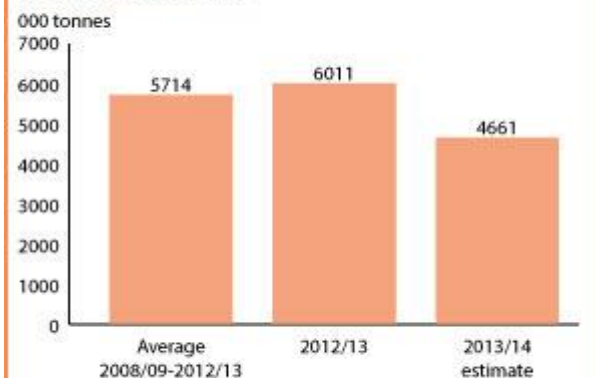
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Wheat	4 989	3 870	7 000	81
Barley	2 253	1 200	2 700	125
Maize	158	149	159	7
Others	96	112	113	1
Total	7 496	5 331	9 972	87

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

2013, against 3.4 percent in May 2013. In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices is mitigated by government subsidies of more than one million tonnes of "national flour", a common wheat of standard quality used to make flour for the low-income consumers. The Government covers the difference between the actual price and guaranteed mill price (MAD 2,600/tonne as of April 2013). Durum wheat is not regulated.

Reference Date: 20-November-2012

FOOD SECURITY SNAPSHOT

- Favourable rains herald a good start to the winter cropping season
- Cereal production was reduced significantly in 2012 following poor rains
- Food prices are stable despite some increases in cereal prices

Good start to the new season

Planting of the winter crops (mainly wheat and barley), for harvest from May next year, is under way. Although above average rains have hampered some field work, soil moisture has improved significantly encouraging early planting. Projections from the Ministry of Agriculture indicate that total area under cereals would remain at about 5 million hectares, similar to last year. The government has taken various measures to improve yields, including the provision of certified seeds (at 40-60 percent of the cost), subsidies for farm machinery and irrigation equipment (30-70 percent of the purchase cost), and subsidies for soil testing to optimise fertiliser application. The area covered by crop insurance with 50-90 percent of insurance premium subsidised is expected to increase from current 300 000 to 500 000 hectares (with an intention to reach 1 million hectares covered by 2015).

Low numbers of adult locusts are present in northeast Morocco. Depending on the developments in the northern Sahel, some groups and small swarms could be expected to move as far as Morocco.

Sharp decline in 2012 cereal production

Cereal production in 2012 was estimated at 5.3 million tonnes, some 38 percent below the last year's exceptional harvest and 23 percent below the five-year average. Late sowing, cold spells in early 2012 and subsequent drought conditions have contributed to the decline. To encourage local purchases of crops, the government extended the 2012 government procurement period by one month, to September 2012. By the end of September domestic soft wheat stocks were about 1.3 million tonnes, covering the milling needs for about three months.

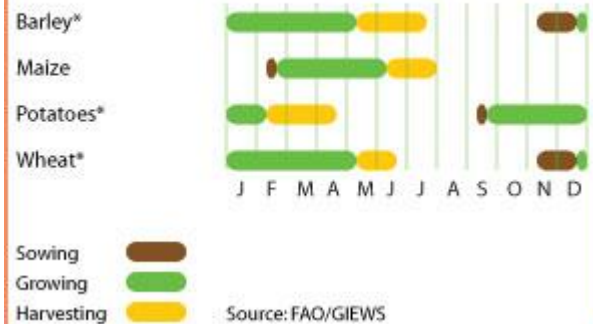
Furthermore, Morocco's citrus fruit production in 2012 is expected to decrease by 25 percent following unfavourable weather conditions. By contrast, the date harvest is expected to increase by 10 percent compared to the last five years.

Wheat imports expected to increase in 2012/13

Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Given tight local supplies, Morocco's cereal imports in 2012 are estimated to reach a record high level of 8.4 million tonnes, 35 percent up on 2011. Wheat constitutes the bulk of the imports amounting to about 5.2 million tonnes. France and Canada are likely to re-emerge as dominant sellers of wheat to Morocco following difficulties with export supplies in the

Morocco

Crop calendar (*major foodcrop)



Morocco

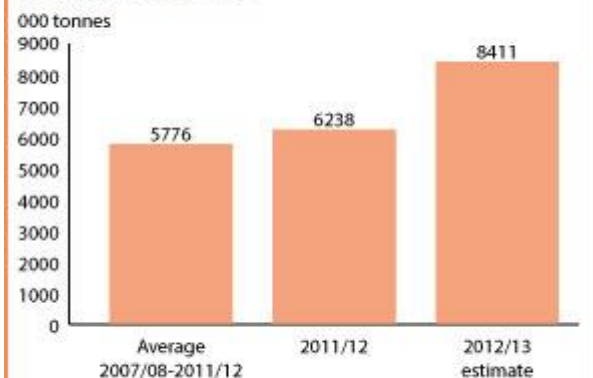
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	4,532	6,020	3,870	-36
Barley	2,165	2,340	1,200	-49
Maize	147	169	149	-12
Others	87	93	94	1
Total	6,931	8,622	5,313	-38

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Black Sea region.

In light of the large import requirements, Morocco suspended a 17 percent import duty on soft wheat from 1 October until 31 December and on durum wheat from 1 May until 31 December 2012.

The import restitution scheme, whereby the Government reimburses wheat importers for the difference between a government-set price and the prices in the international market was expanded from 1 October to 31 December 2012. Wheat importers are reimbursed 85 percent of the difference between a government reference price (dirhams 2 600/tonne, about USD 300/tonne) and international price levels. The allocated budget for the wheat market stabilization scheme is estimated at USD 116 million. Previously the import restitution scheme reimbursed 100 percent of the difference.

Food inflation remains moderate despite some increase in cereal prices

In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices were mitigated by government interventions, including the above mentioned import restitution scheme and other subsidies. According to the Government, the price of bread (a loaf of 200 grammes) is to stay at dirhams 1.2 (USD 0.14).

However, the current poor production is exerting some upward pressure on food prices. The food inflation rose 1.4 percent in the 12 months to the end of September, against 1.5 percent in August.

Morocco was granted over USD 6 billion liquidity line by the International Monetary Fund (IMF) in September 2012 to balance the impact of the euro-zone, its main trading partner, and the threat of further depletion of the country's hard currency reserves due to lower tourism and smaller remittances.

Like other countries in the subregion, Morocco is considering a reform of its subsidy system to achieve greater targeting to the neediest people. Nevertheless, in 2013 the preliminary budget for subsidy spending on energy and staple commodities is kept at similar levels to 2012. Widening fiscal and current account deficits resulted in a downgrading of its economic outlook. Morocco expects its economic growth to strengthen to 4.5 percent in 2013.

Reference Date: 23-May-2012

FOOD SECURITY SNAPSHOT

- Large decline forecast in the 2012 winter cereal crops
- Cereal imports lower in 2010/11, following last year's bumper crop
- Food prices are stable despite some increase in cereal prices

Poor prospects for the 2012 winter crops

Prospects for the 2012 winter wheat and coarse grain crops, about to be harvested, are poor. In November, timely but significantly above average precipitation delayed planting activities into December and January. Subsequently, rainfall levels dropped rapidly to minimal amounts from December until early March. In addition, the unusually low temperatures in early and mid-February affected standing crops. Despite a resumption of rainfall in April, much of the yield potential had already been lost as the typical reproductive period of March, especially for wheat, has passed. The most affected areas include the Gharb, Loukkos, Rabat-Sale-Zemmour-Zaer, Souss-Massa, Chaouia-Ouardigha and the Eastern region. Satellite based vegetation indices indicate less vegetation and biomass, corroborating the impact of moisture stress.

As a result, the early forecast for wheat, the main staple, at some 2.7 million tonnes, point to a sharp reduction of about 55 percent and 40 percent compared to last year and of the previous five year average, respectively. Production of barley, consumed mostly as animal feed, is forecast to also significantly decline to 900 000 tonnes, less than half of the output of last year and of the average.

Wheat imports observe a decline in the just ended 2011/12 (June/May) marketing year

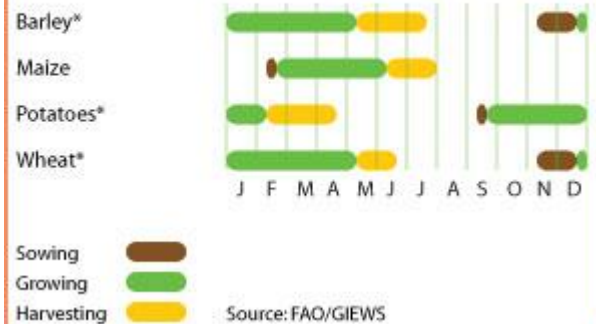
Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Following the reduced crop in 2010, wheat production increased by 23 percent in 2011 due to increased planting and adequate rainfall during the growing season. As a result, the cereal import in marketing year 2011/12 (June/May) is estimated at about 5.5 million tonnes, some 13 percent below 2010/11.

However, given the poor prospects this year, cereal import requirements are expected to increase in the current 2012/13 marketing year (June/May).

Food inflation remains moderate despite some increase in cereal prices

In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices were mitigated by government interventions, including the establishment of an import restitution scheme, whereby the Government reimbursed wheat importers for the difference between a government-set price and the

Morocco Crop calendar (*major foodcrop)

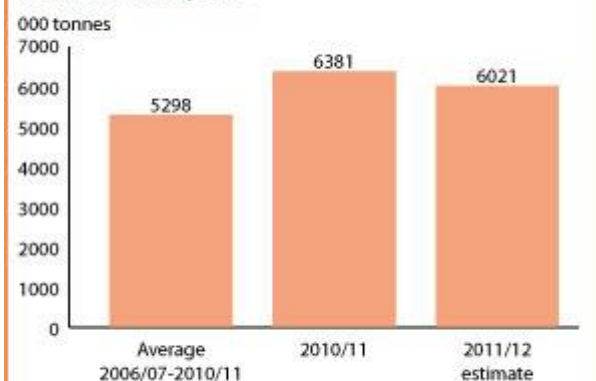


Morocco Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Wheat	4 532	6 020	2 700	-55
Barley	2 165	2 340	900	-62
Maize	147	169	149	-12
Others	84	87	87	0
Total	6 928	8 616	3 836	-55

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

prices in the international market.

However, the current poor production prospects are exerting some upward pressure on food prices. In February 2012, the food price inflation registered an increase of 0.7 percent compared to January 2012 mainly due to an increase in the price of cereals (11.9 percent) and fish (4.5 percent), and subsequently stabilised in March.

The year-on-year inflation rate in the food sector was estimated in March at 0.8 percent, which is low in absolute terms but still more than double the general rate of inflation, estimated at 0.3 percent.

GIEWS Country Brief

Morocco



Reference Date: 03-April-2012

FOOD SECURITY SNAPSHOT

- Early prospects for the 2012 winter crops unfavourable due to erratic rains
- Cereal imports decreased in 2010/11, following last year's good crop
- Domestic food price inflation remains moderate despite increasing cereal prices

Poor prospects for the 2012 winter crops

Early prospects for the 2012 winter wheat and coarse grain crops, to be harvested from around June, are generally poor. In November, timely but significantly above average precipitation delayed planting activities into December and January. In addition, the unusually low temperatures in early and mid-February may have also caused damage to standing crops. While a resumption of rainfall could still be beneficial, much of the yield potential may have already been lost as March is a typical reproductive period for wheat. The most affected areas include the Gharb, Loukkos, Rabat-Sale-Zemmour-Zaer, Souss-Massa, Chaouia-Ouardigha and the Eastern region. Early satellite vegetation indices are poor, indicating less vegetation and less dense biomass and suggesting a likely reduction in yields.

Wheat import requirements estimated to decline in 2011/12 (June/May) marketing year

Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Following a reduced crop in 2010, wheat production increased by 23 percent in 2011 due to above adequate rainfall during the growing season. As a result, cereal imports in marketing year 2011/12 (June/May) is estimated to decline to about 5.5 million tonnes, some 13 percent below 2010/11.

However, given mixed prospects for this year's crop, cereal import requirements are expected to increase in the next 2012/13 marketing year (June/May).

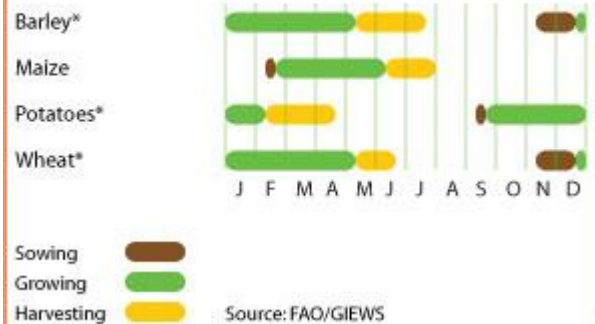
Food inflation remains moderate despite increasing cereal prices

In spite of the country's high import dependency rate, the impact of the changes in international prices on domestic prices were mitigated due to government interventions, including the establishment of an import restitution scheme, whereby the Government reimbursed wheat importers for the difference between a government-set price and the prices in the international market.

However, mixed domestic production prospects are exerting some upward pressure on cereal prices. In February 2012, the food price inflation registered an increase of 0.7 percent compared to January 2012 mainly due to an increase in the price of cereals (11.9 percent)

Morocco

Crop calendar (*major foodcrop)



Morocco

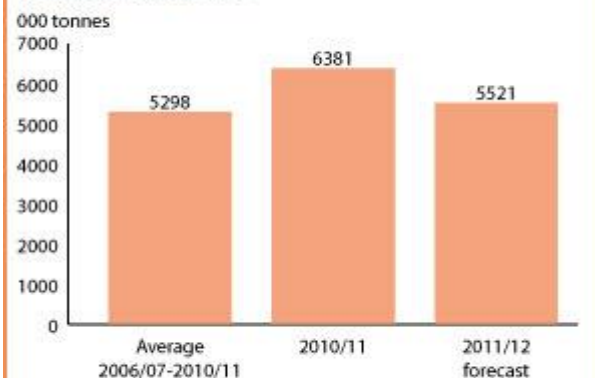
Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	4 593	4 887	6 020	23
Barley	2 204	2 570	2 340	-9
Maize	173	200	169	-16
Others	82	88	87	-1
Total	7 052	7 745	8 616	11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

and fish (4.5 percent). However, the year-on-year inflation rate in the food sector was estimated at 0.4 percent.

Reference Date: 24-August-2011

FOOD SECURITY SNAPSHOT

- A good cereal crop is expected this year despite delayed seasonal rains
- Cereal imports increased in 2010/11, following last year's reduced crop
- Lower wheat import requirements forecast in 2011/12 (June/May) marketing year
- Domestic food price inflation remains moderate

Good cereal harvest in 2011 following favourable rainfall

Harvesting of the 2011 winter crops (wheat and barley) has just been completed. Estimates indicate increased production due to above the average, although delayed, rainfall during the growing season. Wheat output, estimated at more than 6 million tonnes, is around 29 percent more than last year's reduced crop and 36 percent higher than the past five-year average.

Wheat import requirements expected to decline in 2011/12 (June/May) marketing year

Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Following a record crop in 2009, wheat production dropped by 24 percent in 2010 due to insufficient soil moisture at planting and subsequent erratic rains in the main growing areas. As a result, cereal imports increased significantly in the marketing year 2010/11 (June/May) to about 6 million tonnes, some 30 percent above 2009/10, according to the Moroccan National Office of Cereals and Vegetables.

Given this year's good crop, cereal import requirements are forecast to decline in 2011/12 marketing year (June/May).

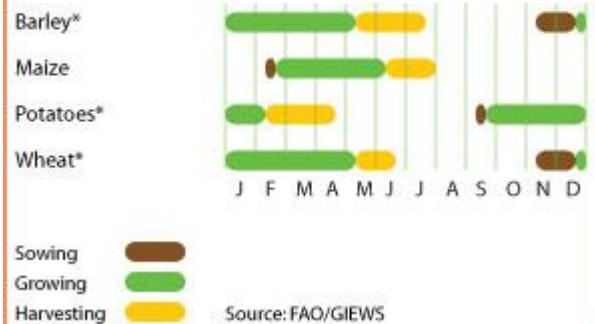
Food inflation remains moderate

In spite of the country's high import dependency rate, the changes in international prices have had limited impact so far on domestic prices due to government interventions. The Government took several measures to limit the impact of high international prices on consumers, including the establishment of an import restitution scheme. As of June 2011, despite the boost in production, the Government increased the farm gate price of wheat from 280 DH to 290 DH per quintal.

In July 2011, the year-on-year inflation rate in the food sector was estimated at 3.1 percent. With respect to a month earlier, the food price inflation registered an increase of 1.2 percent mainly due to an increase in the price of fish (4.3 percent), vegetables (3.7 percent) and meat (2 percent).

Morocco

Crop calendar (*major foodcrop)



Morocco

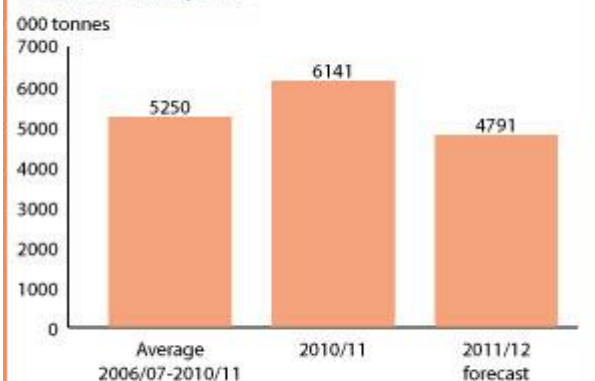
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	4 616	4 900	6 300	29
Barley	2 190	2 600	2 500	-4
Maize	173	200	169	-16
Others	43	42	43	2
Total	7 062	7 788	9 057	16

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- A good cereal crop is expected this year due to favourable rainfall situation
- Cereals' imports increased in 2010/11, following last year reduced crop
- Domestic food price inflation remains moderate

Planted area increased following timely and widespread seasonal rains

Early prospects for the 2011 winter wheat and coarse grain crops, to be harvested from around June, are good. Timely and good rains during land preparation and plantings led to an increase in planted area. About 4.9 million hectares have been planted to wheat (2.2 million hectares of soft wheat and 1.5 million hectares of durum wheat) and barley (1.6 million hectares). This figure is around 3 percent above the previous year's level.

A good cereal harvest is in prospect

Moreover, soil moisture levels have generally been adequate to meet the crops' water requirement since the beginning of the growing season, allowing satisfactory crop development in main producing zones. The Government has also continued its support to the agricultural sector through the implementation of the "Plan Maroc Vert" Programme. Nearly 110 000 tonnes of improved seeds have been sold at subsidized prices by late March, which is similar to the quantity distributed over the same period in the previous year. In addition, 560 000 tonnes of fertilizers have been sold over the same period. Overall, a good cereal harvest is anticipated from June, assuming normal conditions continue.

Cereal imports Increase

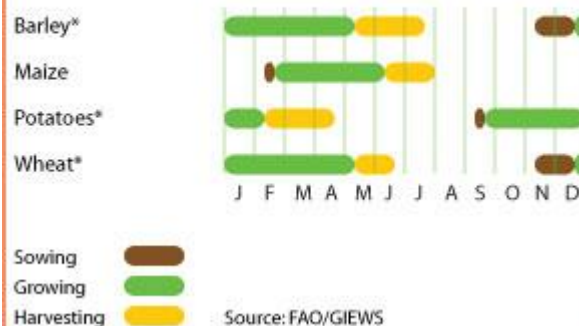
Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Even in good years, the country relies heavily on wheat imports from the international market to cover its consumption needs. Following a record crop in 2009, wheat production dropped by 24 percent in 2010 due to insufficient soil moisture at planting and subsequent erratic rains in the main growing areas. As a result, cereal imports are forecast to increase significantly in marketing year 2010/11 (July/June). About 5.8 million tonnes of cereals have been imported as of late April, according to Moroccan National Office of Cereals. This number is 55 percent above the quantity imported in the previous year.

Food inflation remains moderate due to Government interventions

In spite of the country's high import dependency rate, the changes in international prices have had minor impact so far on domestic prices because of government interventions. The Government took several measures to limit the impact of high international prices on consumers. These include: the suspension of import duties and the establishment of an import restitution scheme. As a result, the food price inflation rate

Morocco

Crop calendar (*major foodcrop)



Morocco

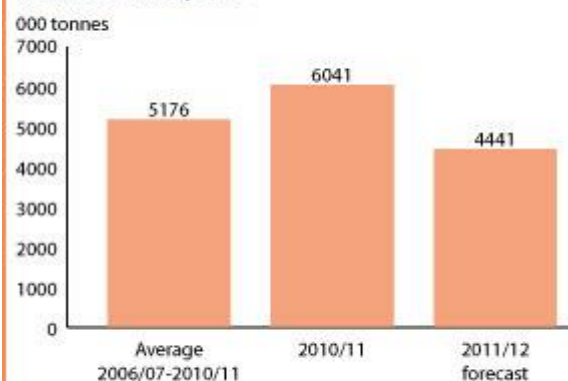
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	4 593	4 887	5 900	21
Barley	2 204	2 570	3 100	21
Maize	173	200	169	-16
Others	43	42	43	2
Total	7 053	7 745	9 257	20

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Morocco

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

has been following a downward trend since November 2010. It declined by 0.1 percent between February and March 2011. The year-on-year inflation rate in the food sector was estimated at 4 percent in December 2010.

Reference Date: 31-January-2011

FOOD SECURITY SNAPSHOT

- A good cereal crop is expected this year due to favourable rainfall situation so far.
- Food prices declined in December

Crop prospects are favourable following good rains

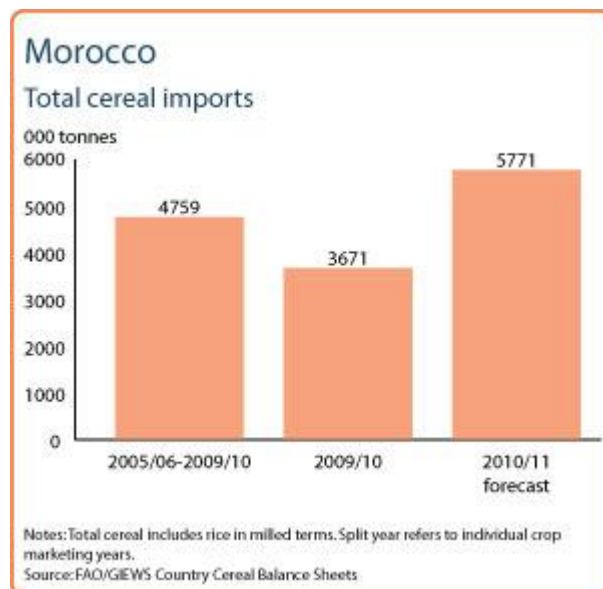
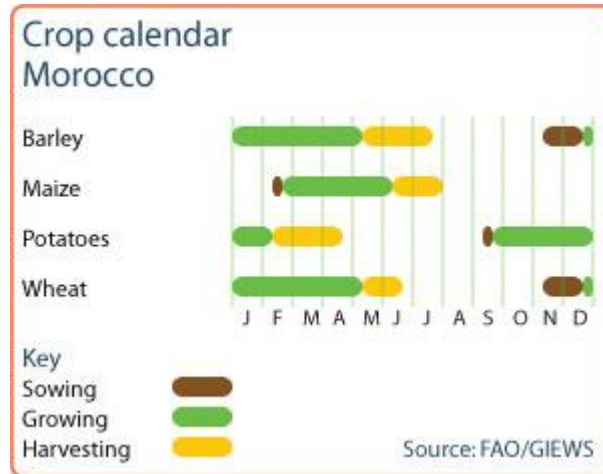
Early prospects for the 2011 winter wheat and coarse grain crops, to be harvested from around June, are good. Soil moisture has been generally adequate to meet crops' water requirement since the beginning of the growing season, allowing satisfactory crop development in main producing zones. Moreover, the Government has continued its support to the agricultural sector through the implementation of the "Plan Maroc Vert" Programme. An estimated 100 000 tonnes of improved seeds have been sold at subsidised prices by late December, which is similar to the quantity distributed over the same period in the previous year. Similarly, 275 000 tonnes of fertiliser have been sold by late December. About 4.5 million hectares have been planted to wheat and barley by late December, which is 34 percent above last year's level.

Morocco is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a record crop in 2009, wheat production dropped by 24 percent in 2010 due to insufficient soil moisture at planting and subsequent erratic rains in the main growing areas.

Food inflation remains moderate

Morocco relies heavily on wheat imports from the international market to cover its consumption needs. In spite of the record crop gathered in 2009, the country imported about 2 million tonnes of wheat, 25 percent of its domestic utilization, in the 2009/010 marketing year. Import levels are anticipated to be much higher during 2010/11 (July/June), due to last year's reduced crop. Consequently, the recent sharp rises in food prices have raised serious concerns over the food supply outlook in the country.

The changes in international prices, however, have had minor impact so far on domestic prices. The food price inflation rate declined by 2.1 percent between November and December 2010. The year-on-year inflation rate in the food sector was estimated at 4 percent in December 2010. Nonetheless, the country's food import bill is expected to increase significantly in the 2010-11 marketing year.



Reference Date: 16-September-2010

FOOD SECURITY SNAPSHOT

- A reduced cereal crop is expected this year due to delayed rains and reduced area.
- High international wheat prices will affect food import bill.

Lower cereal production following delayed seasonal rains

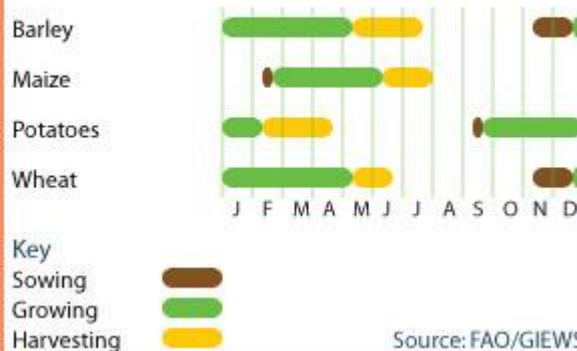
Harvesting of the 2010 winter crops (wheat and barley) has been virtually completed. Production is estimated to have dropped sharply, due to below-normal rains in October and November, which has led to a decline in planted area. Wheat output is estimated at about 4 million tonnes, which is 36 percent below last year record crop and 4 percent below the past 5-year average.

The drop in production occurred in spite of Government continued support to the agricultural sector. In the framework of the implementation of the Government's "Plan Maroc Vert" Programme, distribution of subsidised inputs has increased significantly. An estimated 110 000 tonnes of improved seeds have been sold at subsidised prices by late July, which is 63 percent higher than the quantity distributed over the same period in the previous year. Similarly, 830 000 tonnes of fertiliser have been sold by late July.

High international wheat prices will lead to higher food import bill

Morocco still relies heavily on wheat imports from the international market to cover its consumption needs. In spite of last year record crop, the country imported about 2 million tonnes of wheat, 25 percent of its domestic utilization, in the 2009/010 marketing year. Import level is anticipated to be much higher during 2010-11, due to this year's reduced crop. Consequently, the recent Russian ban on wheat exports and subsequent sudden sharp rises in prices has raised serious concerns over the food supply outlook in the country. Although Morocco imports very limited quantity from Russia, the country's food import bill will increase significantly.

Crop calendar Morocco

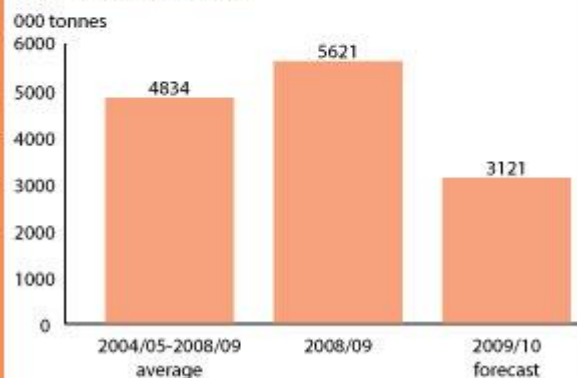


Morocco Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	4045	3730	6370	71
Barley	1686	1272	3700	191
Maize	178	150	200	33
Others	80	80	79	-1
Total	5989	5232	10349	98

Note: percentage change calculated from unrounded data.

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 24-March-2010

FOOD SECURITY SNAPSHOT

- Early prospects for the 2010 winter crops are mixed due to delayed rains, reduced area planted and substantial flooding.
- Cereal imports are forecast to decline steeply in 2009/10 marketing year in response to last year record crop

Lower planted area following delayed seasonal rains

Early prospects for the 2010 winter wheat and coarse grain crops, to be harvested from around June, are mixed. Land preparation and plantings were delayed by below-normal rains in October and November, which has led to a drop in planted area. About 4.7 million hectares have been planted to wheat and barley by late February, which is 8 percent lower than in the previous year. However, precipitation increased significantly in December and January and remained abundant in February, leading to flooding in several regions notably in Gharb, Souss-Massa and Tangerois regions. In Gharb, the most affected region, an estimated 120 000 hectares of crops have been damaged by heavy rains and floods.

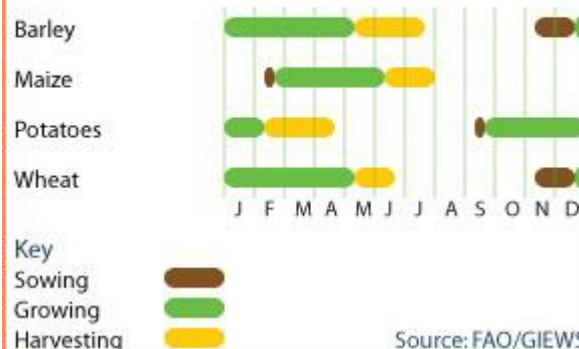
Input use increased due to Government support

In the framework of the implementation of the Government's "Plan Maroc Vert" Programme, distribution of subsidised inputs has increased significantly. An estimated 109 000 tonnes of improved seeds have been sold at subsidised prices by late February, which is 60 percent higher than the quantity distributed over the same period in the previous year. Similarly, 540 000 tonnes of fertiliser have been sold by late February, 11 percent more than in the previous year. Nevertheless, harvest prospects remain mixed due to the impact of the initial dry conditions and subsequent floods.

Cereal imports forecasted to decline steeply in 2009/10 following 2009 record crop

Aggregate cereal production in 2009 was estimated at about 10.4 million tonnes, more than double the 2008 harvest. Wheat output reached 6.4 million tonnes, 71 percent over previous year's level and more than four times the poor crop harvested in 2007, following exceptionally favourable weather throughout the winter cropping season. Consequently, imports of wheat in 2009/10 (July/June) are forecast to drop by nearly 60 percent to about 1.5 million tonnes.

Crop calendar Morocco

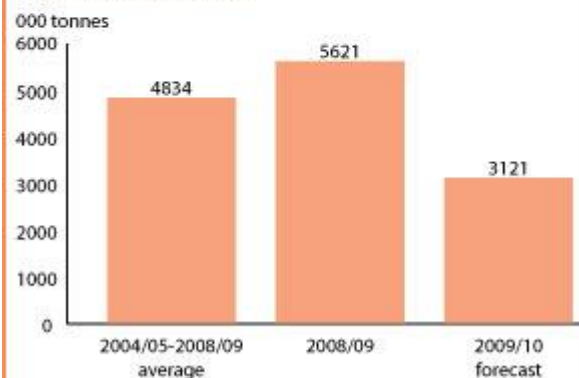


Morocco Cereal production

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Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 05-February-2010

FOOD SECURITY SNAPSHOT

- Early prospects for the 2010 winter crops are mixed due to delayed rains and reduced area planted.
- Cereal imports are forecasted to decline steeply in 2009/10 commercial year in response to last year record crop
-

Lower planted area following delayed seasonal rains

Early prospects for the 2010 winter wheat and coarse grain crops, to be harvested from around June, are mixed. Land preparation and plantings were delayed by below-normal rains in October and November, which is likely to lead to a drop in planted area. About 3 million hectares have been planted to wheat and barley by late December. The Ministry of Agriculture forecasts total planted area at the end of the season at about 4.5-4.8 million hectares, which is lower than the average of 5 million hectares in the past 5 years. However, precipitation increased significantly in December and January, leading to flooding in some areas. An estimated 58 000 hectares of crops have been damaged by heavy rains and floods in Gharb region.

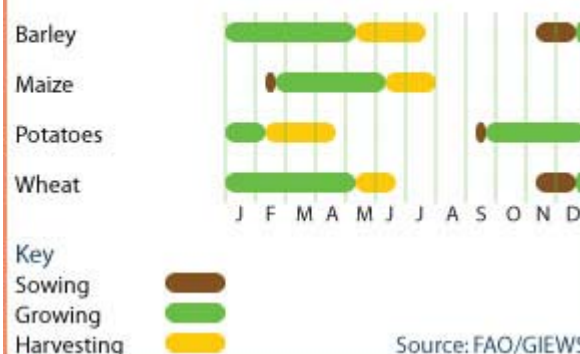
Input use increased due to Government support

In the framework of the implementation of the Government's "Plan Maroc Vert" Programme, distribution of subsidised inputs has increased significantly. An estimated 105 tonnes of improved seeds have been sold at subsidised prices by late December, which is 58 percent higher than the quantity distributed over the same period in the previous year. Nevertheless, due to the delayed rains and initial dry conditions increased rains will be crucial during the next few months to avoid loss of yield potential.

Cereal imports forecasted to decline steeply in 2009/10 following 2009 record crop

Aggregate cereal production in 2009 was estimated at 10.4 million tonnes, more than double the 2008 harvest. Wheat output reached 6.5 million tonnes, 74 percent over previous year's level and more than four times the poor crop harvested in 2007, following exceptionally favourable weather throughout the winter cropping season. Consequently, imports of wheat in 2009/10 (July/June) are forecast to drop by nearly 60 percent to about 1.5 million tonnes.

Crop calendar Morocco

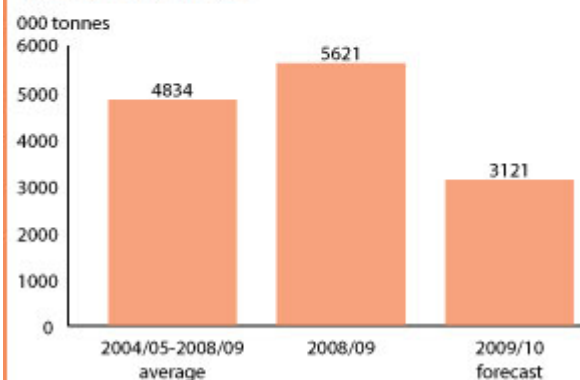


Morocco Cereal production

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Source: FAO/GIEWS Country Cereal Balance Sheets