



# GIEWS Country Brief Morocco

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## 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.

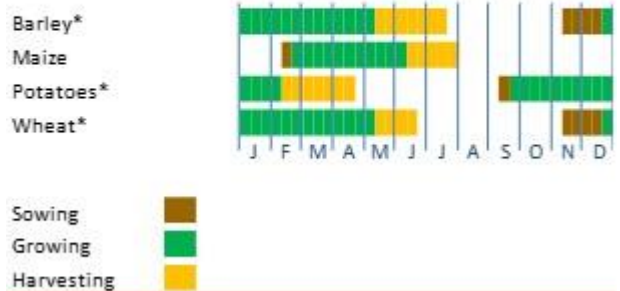
## Wheat imports to decrease in 2018/19 owing to ample domestic production

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
<b>Total</b>	<b>8 379</b>	<b>9 842</b>	<b>10 463</b>	<b>6.3</b>

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.

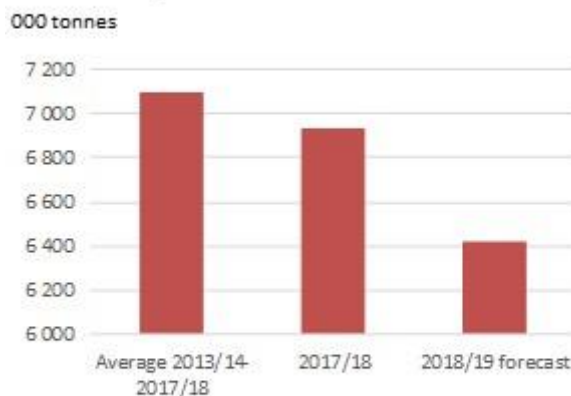
### Food inflation remains low

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.