

Required Report: Required - Public Distribution

Date: September 13, 2021

Report Number: MO2021-0019

Report Name: Grain and Feed Update

Country: Morocco

Post: Rabat

Report Category: Grain and Feed

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Report Highlights:

The Government of Morocco has released its final wheat and barley production numbers for the 2021 crop, including 5.06 MMT of common wheat, 2.48 MMT of durum wheat, and 2.78 MMT of barley. On September 7, 2021, the National Interprofessional Office of Cereals and Pulses (ONICL) issued an import tender for 363,636 MT of common wheat from the United States under the Tariff Rate Quota (TRQ) with auction results to be announced September 21, 2021. Given Morocco's strong production in MY 2021/22, Post expects no changes to Morocco's current customs duties for common wheat or durum wheat through December 31, 2021.

General Information

Production Update

On July 26, 2021, the Government of Morocco released its [final](#) wheat and barley production numbers for the 2021 crop (5.06 MMT of common wheat, 2.48 MMT of durum wheat, and 2.78 MMT of barley). This harvest performance is mainly due to abundant rainfall during the growing season, which was 32 percent higher than the previous year. The growing regions of Chaouia, Abda, Haouz, Tadla, and Sais recorded yields 44 percent above the ten-year average. Post adjusts MY2021/22 production numbers for wheat and barley based on Morocco's final official numbers.

Policy

On September 7, 2021, the Moroccan National Interprofessional Office of Cereals and Pulses (ONICL) issued an import [tender](#) for 363,636 MT of common wheat from the United States under the Tariff Rate Quota (TRQ) with auction results to be announced September 21, 2021.

On August 6, 2021, ONICL issued an import [tender](#) for 363,636 MT of durum wheat from the United States under the TRQ. ONICL set December 31, 2021, as a deadline for delivery with a minimum of 5,000MT. On August 24, 2021, ONICL announced that no bids were received for the U.S. durum tender. Wheat industry contacts report that they declined to bid on the August tender because U.S. durum wheat prices were not competitive in the Moroccan market, largely due to limited U.S. supply.

Trade Update

Moroccan wheat imports are expected to return to normal levels in MY 2021/2022. Post forecasts Morocco will import 4.5 million MT, primarily from common wheat suppliers in France, Ukraine and Russia. Canada is expected to remain Morocco's primary durum wheat supplier. U.S. wheat remains priced out of the Moroccan market. Post has updated the PSD tables to reflect increased wheat exports in MY and TY 2020/21. Post has decreased Moroccan Barley imports in MY and TY 2020/21.

Wheat Imports by Marketing Year (MT Wheat Equivalent)

HS	Description	Marketing Year			Year to Date		
		2018/19	2019/20	2020/21	06/20-06/20	06/21-06/21	%Δ
1001	Wheat and meslin	3,705,893	4,607,874	5,426,833	251,620	0	-100
190219*	Pasta (spaghetti, macaroni, etc), uncooked	13,859	14,784	14,383	1,971	1,098	-44.29
190230*	Pasta, prepared, nesoi	3,607	2,775	2,363	345	143	-58.55
1101*	Wheat or meslin flour	512	517	512	40	40	0
190430*	Bulgur wheat, pre-cooked	71	60	60	5	0	-100
190240*	Couscous	5	7	26	7	8	14.29
Total	PSD-wheat	3,723,947	4,626,017	5,444,178	253,987	1,288	-99.49

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

Wheat Exports by Marketing Year (MT Wheat Equivalent)

HS	Description	Marketing Year			Year to Date		
		2018/19	2019/20	2020/21	06/20-06/20	06/21-06/21	%Δ
190240*	Couscous	31,283	36,835	55,816	4,731	4,525	-4.35
190219*	Pasta (spaghetti, macaroni, etc), uncooked	14,351	17,788	13,069	1,971	2,013	2.13
190230*	pasta, prepared, nesoi	3,840	4,722	5,670	687	433	-36.97
1101*	Wheat or meslin flour	26,187	3,427	1,956	410	376	-8.29
1001	Wheat and meslin	50	-	58	10	-	-100
190430*	Bulgur wheat, pre-cooked	-	-	-	-	-	0
Total	PSD-wheat	75,710	62,772	76,570	7,809	7,347	-5.92

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

Barley Imports by Marketing Year (MT)

Partner Country	Marketing Year			Year to Date		
	2017/18	2018/19	2019/20	07/19-06/20	07/20-06/21	%Δ
EU 27	356,592	142,688	943,971	943,971	440,994	-53.28
Ukraine	43,458	8,249	131,649	131,649	12,099	-90.81
Syria	-	-	-	-	3,337	0
Russia	19,658	-	-	-	25,041	0
Other	9,900	-	-	-	-	-
Total	429,609	150,937	1,075,620	1,075,620	481,472	-55.24

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

Production, Supply, and Distribution

Wheat:

Wheat Market Year Begins	2019/2020		2020/2021		2021/2022	
	Jun 2019		Jun 2020		Jun 2021	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,506	2,506	2,758	2,758	2,855	2,855
Beginning Stocks (1000 MT)	5,423	5,423	3,611	3,611	1,145	1,138
Production (1000 MT)	4,025	4,025	2,560	2,560	7,500	7,540
MY Imports (1000 MT)	4,626	4,626	5,444	5,444	4,500	4,500
TY Imports (1000 MT)	4,879	4,879	5,400	5,200	4,500	4,500
TY Imp. from U.S. (1000 MT)	32	32	0	0	0	0
Total Supply (1000 MT)	14,074	14,074	11,615	11,615	13,145	13,178
MY Exports (1000 MT)	63	63	70	77	75	75
TY Exports (1000 MT)	66	66	70	76	75	75
Feed and Residual (1000 MT)	400	400	300	300	500	500
FSI Consumption (1000 MT)	10,000	10,000	10,100	10,100	10,200	10,200
Total Consumption (1000 MT)	10,400	10,400	10,400	10,400	10,700	10,700
Ending Stocks (1000 MT)	3,611	3,611	1,145	1,138	2,370	2,403
Total Distribution (1000 MT)	14,074	14,074	11,615	11,615	13,145	13,178
Yield (MT/HA)	1.6061	1.6061	0.9282	0.9282	2.627	2.641

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Wheat begins in July for all countries. TY 2021/2022 = July 2021 - June 2022

Barley:

Barley	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1,050	1,050	1,467	1,467	1,490	1,490
Beginning Stocks (1000 MT)	411	411	128	148	68	69
Production (1000 MT)	1,161	1,161	640	640	2,780	2,780
MY Imports (1000 MT)	1,056	1,076	500	481	300	300
TY Imports (1000 MT)	1,073	1,080	550	500	300	300
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2,628	2,648	1,268	1,269	3,148	3,149
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	1,700	1,700	600	600	1,700	1,700
FSI Consumption (1000 MT)	800	800	600	600	1,000	1,000
Total Consumption (1000 MT)	2,500	2,500	1,200	1,200	2,700	2,700
Ending Stocks (1000 MT)	128	148	68	69	448	449
Total Distribution (1000 MT)	2,628	2,648	1,268	1,269	3,148	3,149
Yield (MT/HA)	1.1057	1.1057	0.4363	0.4363	1.8658	1.8658
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Barley begins in October for all countries. TY 2021/2022 = October 2021 - September 2022						

Attachments:

No Attachments