



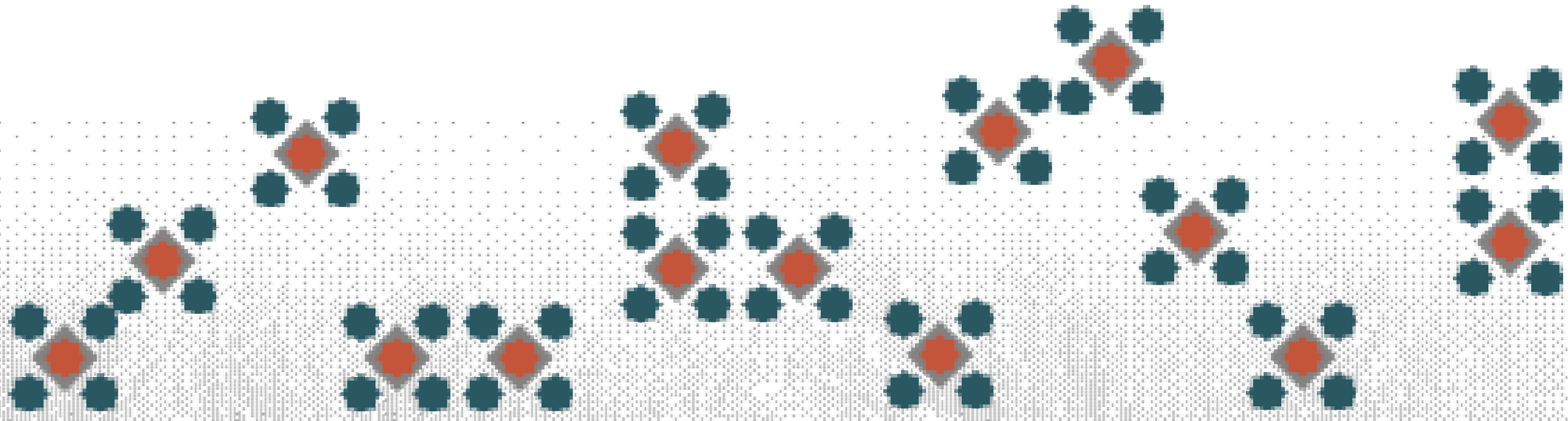
Food and Agriculture  
Organization of the  
United Nations



European Bank  
for Reconstruction and Development

# EBRD/FAO technical cooperation package to support Food Security in the SEMED region

Key trends in the agrifood sector in Morocco





## Overview

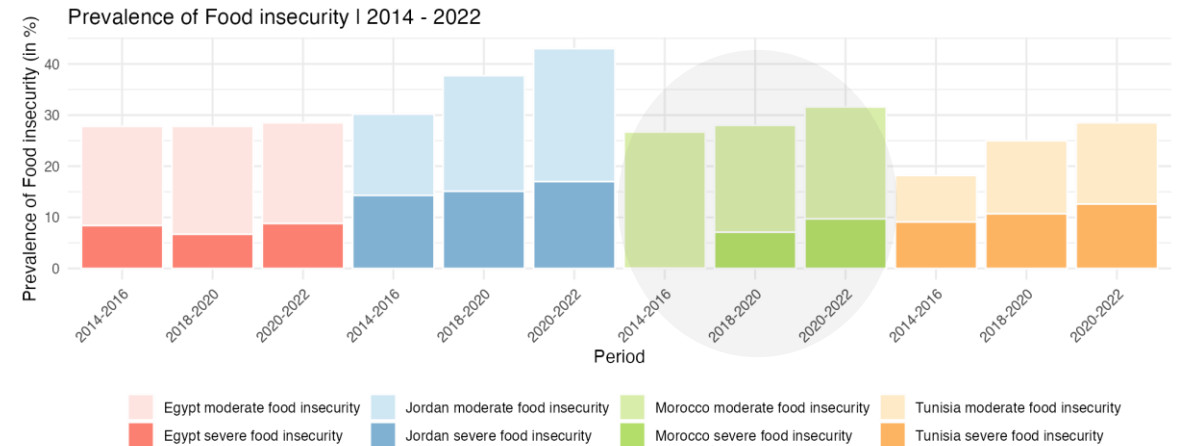
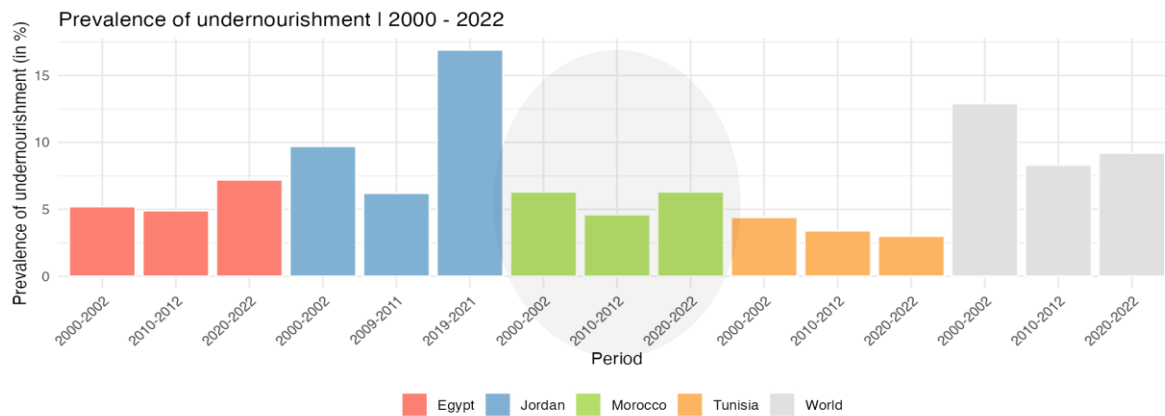
- Updates on food insecurity and malnutrition in Morocco.
- Local agrifood systems for improved agricultural productivity and food security.
- Agricultural trade: focusing on resilience to ensure food and nutrition security for all.
- Policy strategic direction.

# Food insecurity and nutrition update

After decades of decline, prevalence of undernourishment (PoU) in Morocco and other SEMED countries increased.

Morocco witnessed increasing levels of severe food insecurity based on Food Security Experience Scale (FIES).

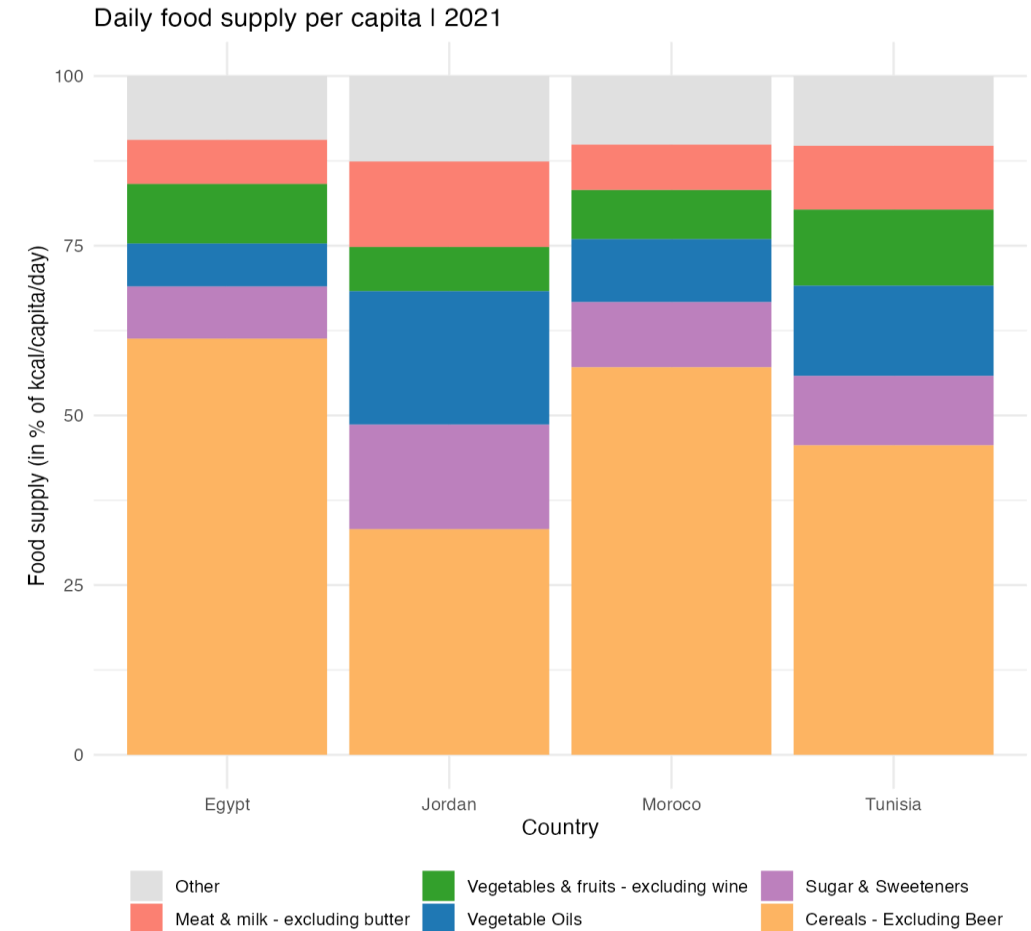
Increasing hunger and food insecurity are due to COVID-19 pandemic, outbreak of war in Ukraine and recent extreme weather events and natural disaster.



Source: FAO STAT, Data for Jordan: Regional Overview of Food Security and Nutrition 2023

# Despite nutrition transition, cereals remain main source of dietary energy, and adult obesity is on the rise

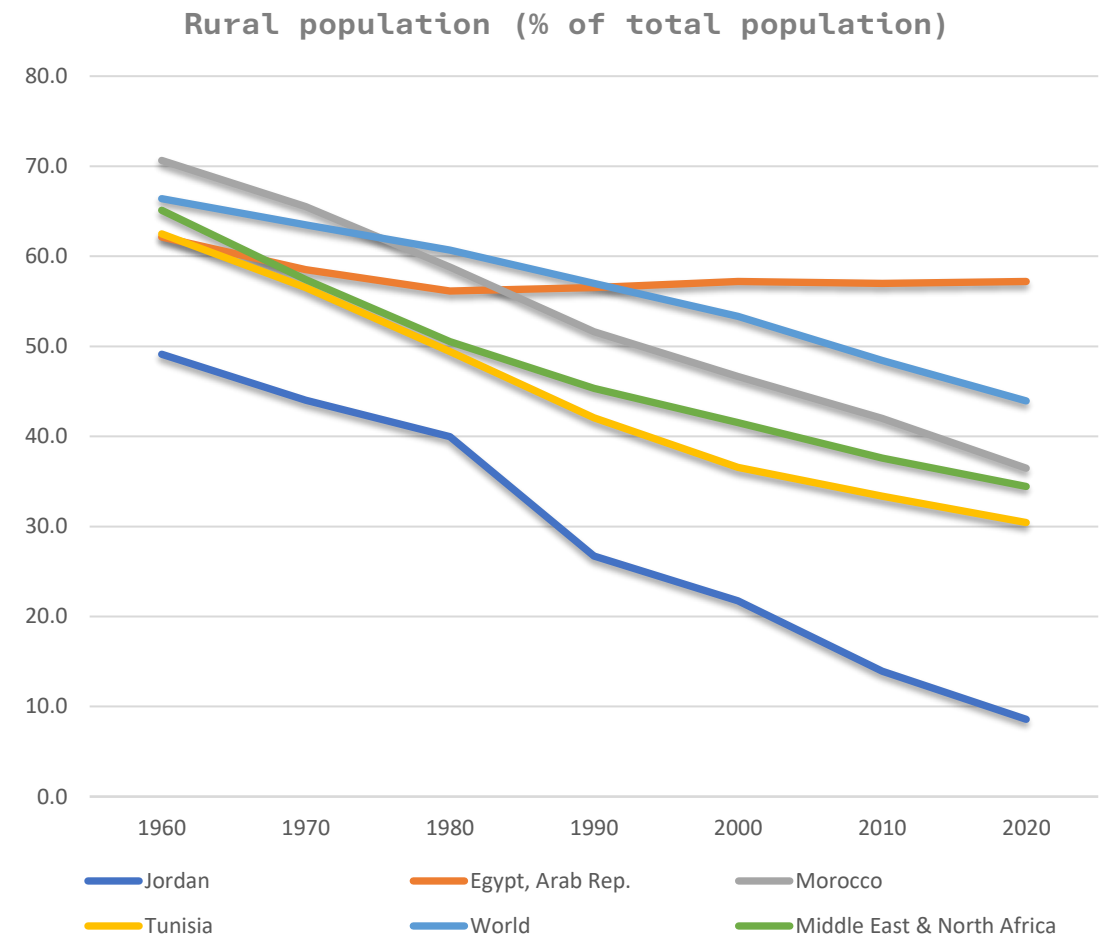
- Sustained economic growth triggered nutrition transition, reducing malnourishment and leading shift in consumption patterns towards greater dietary diversity.
- Obesity among adults in Morocco increased from 16.7% in 2012 to 21.8% in 2022, though level is lower than other three countries. Projections indicate that adult obesity will continue to increase through 2035.
- Cereals account for 57% of dietary energy intake in Morocco, higher than in Jordan and Tunisia but slightly lower than in Egypt.



Source: FAO, 2023

# Demographics, poverty and economic resilience in Morocco

- Morocco's fertility rate and population growth are close to global averages, and 35% of population lives in rural areas. Population density and distribution influence food security and agricultural productivity.
- Poverty is increasing but remains lower than in other SEMED countries, with 4.7% of the population below the national poverty line in 2022.
- While Morocco experienced reduced economic growth during the pandemic, GDP has recovered positive growth.
- While the social protection system is more fragmented compared to other SEMED countries, Morocco has implemented various new programs and subsidies to mitigate effects of external shocks, particularly since the COVID-19 pandemic and onset of Ukraine war.



Source: World Bank, 2024

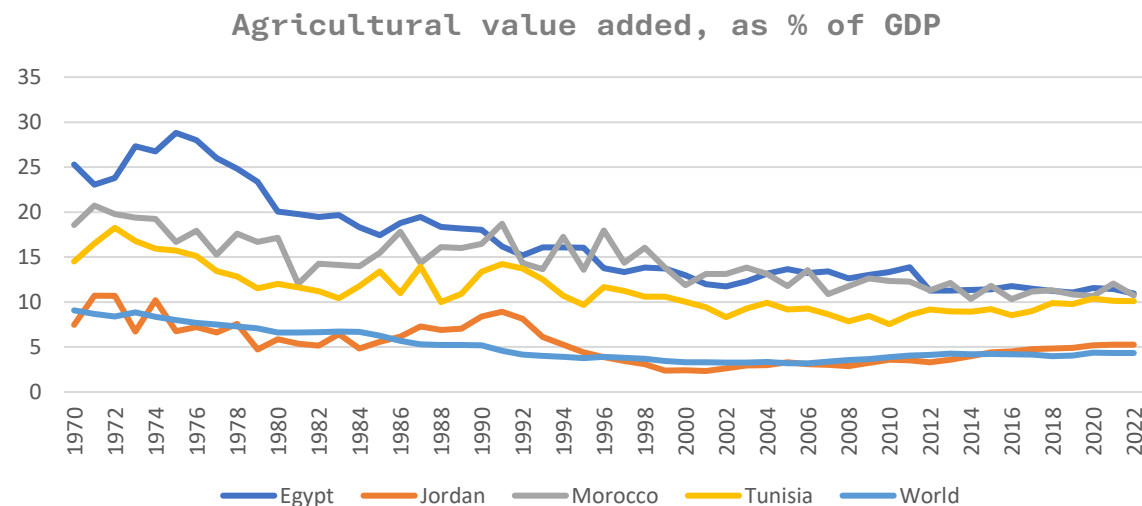
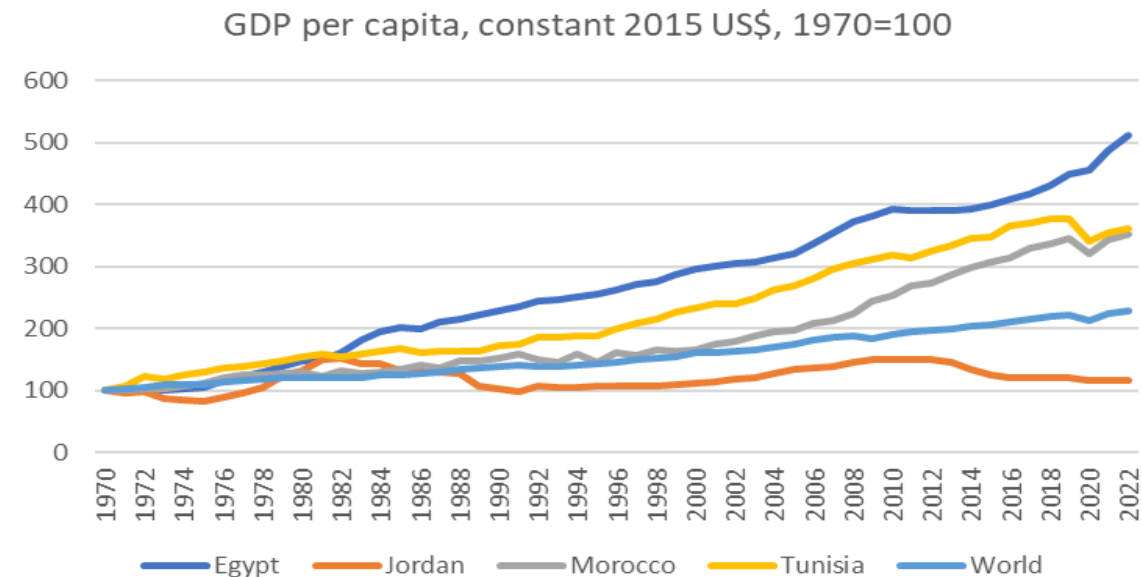
# Local agricultural productivity

**Since 1970, GDP per capita in Morocco, like Tunisia and Egypt, has grown at rate faster than world average.**

In Morocco, similar to Egypt and Tunisia, agriculture contributes approx 10% to total GDP, well above World average of 5%.

**Decline in agriculture's contribution to GDP over past 50 years consistent with structural transformation, though constant since 2000.**

Growth rate of agriculture has outpaced rest of economy over last 20 years.

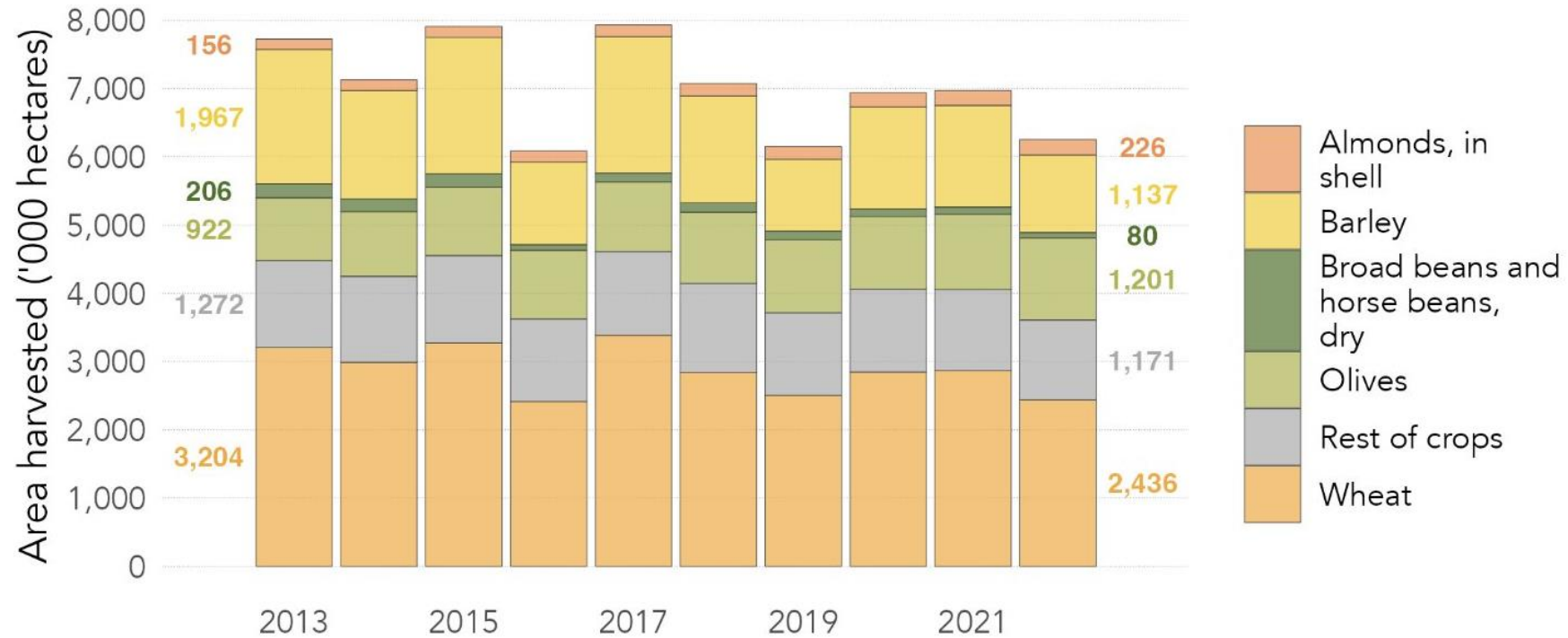


Source: FAOSTAT, 2024

# Main Crops in Morocco

Wheat  
Olives  
Barley  
Almonds, in shell

## Major crops by extent of harvested area

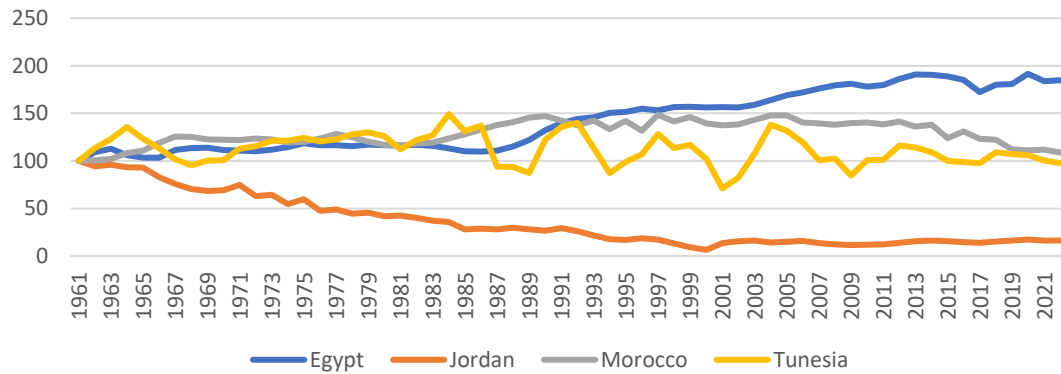


Source: FAOSTAT

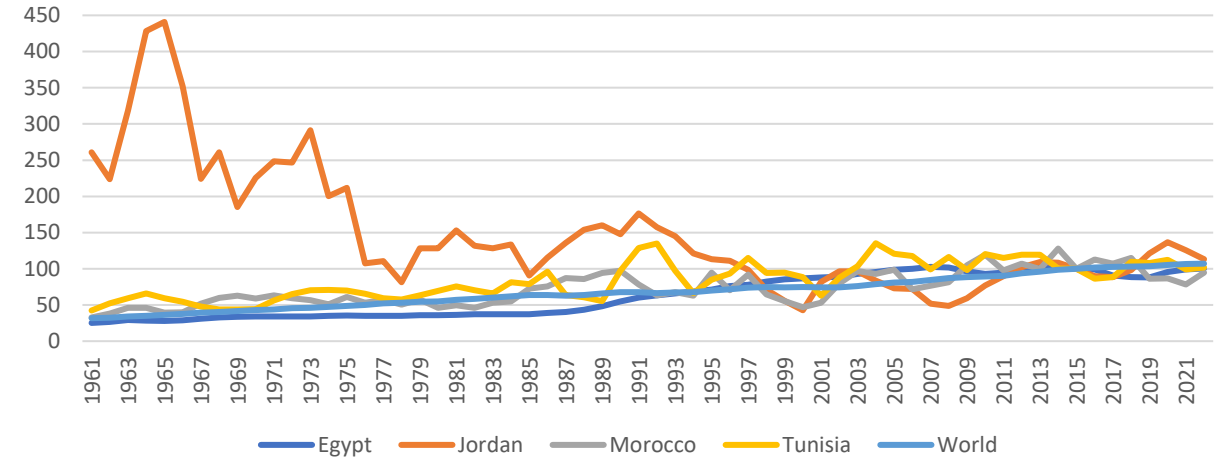


# Trends in cereal production in Morocco

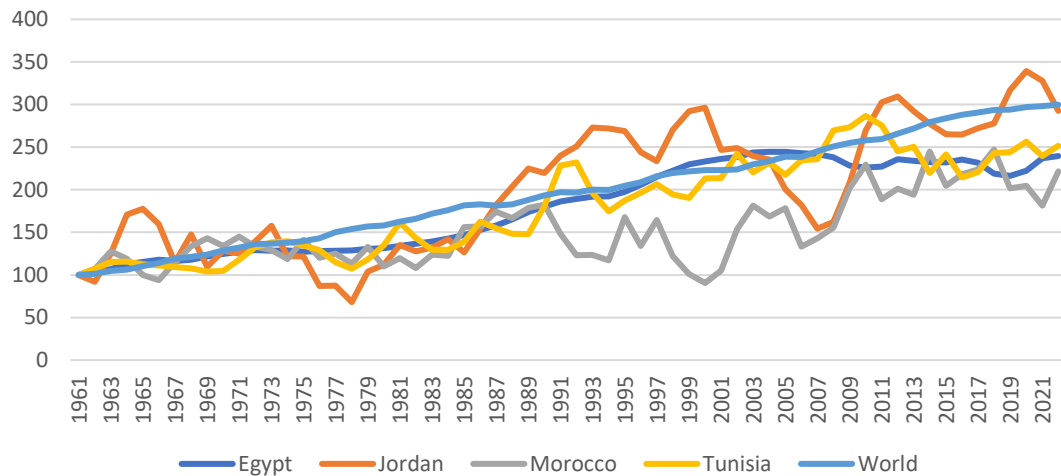
Area under production in cereals, 3 year moving average (1961=100)



Cereals, gross production index (2014-2016=100)



Cereal yields, three year average, 1961=100

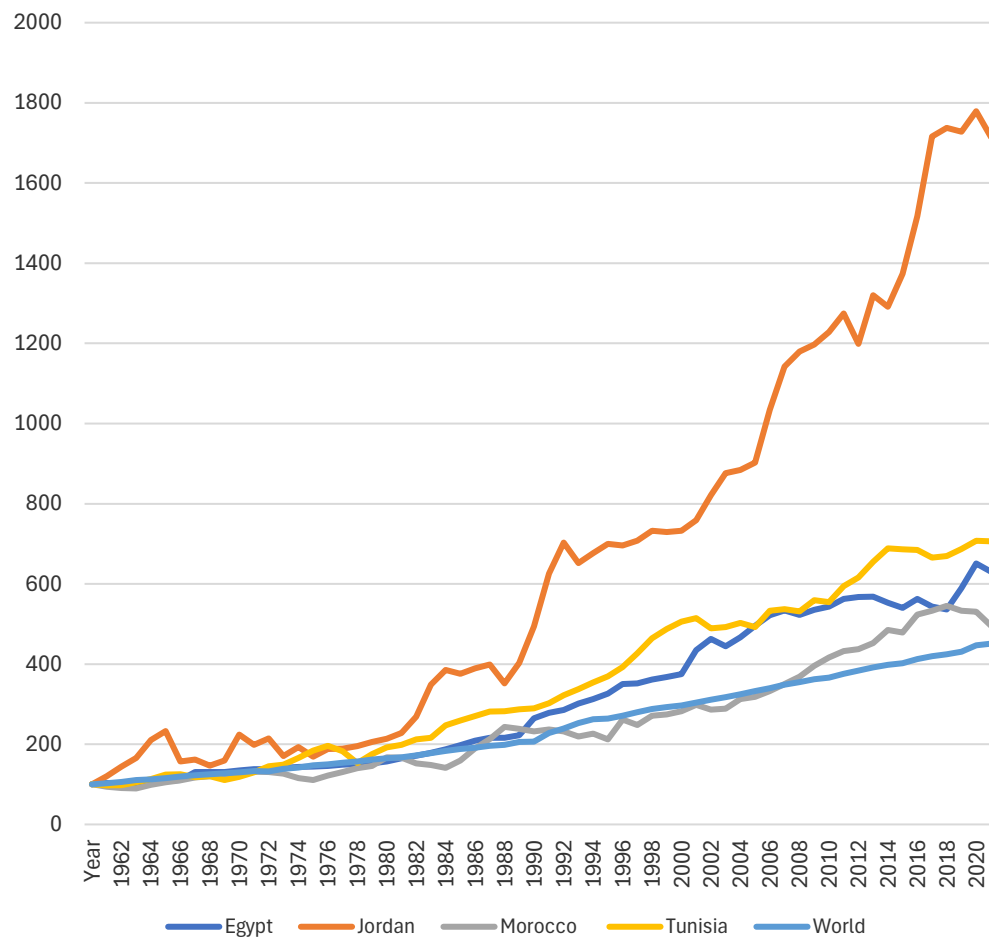


While area harvested in cereals declined, increases in yields led to increased levels of production.

Wheat self-sufficiency is 37%.

# Assessing the contribution of Morocco's livestock sector to economy and food supply

Livestock gross production value  
(constant 2014-2016 '000 US\$,  
1961=100)

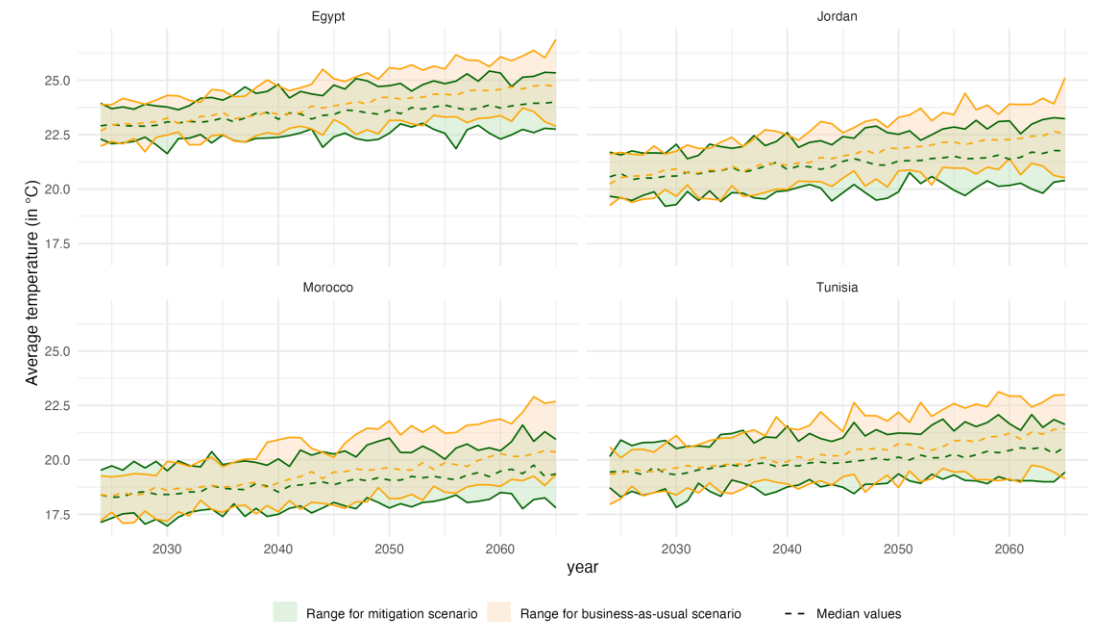
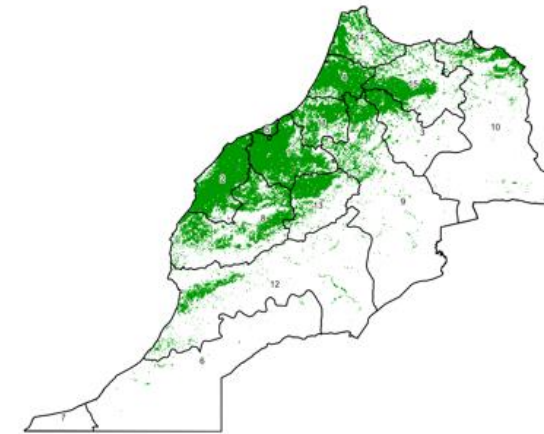


Source: FAO, 2024

- Livestock contributes 38% of agricultural GDP, with diverse practices of traditional and modern farming and increasing poultry production to meet demand.
- While aquaculture is still minor contributor to GDP, it has been prioritized by government and employs predominately women.
- Morocco's agrifood value chains are largest manufacturing sector by output but face challenges such as high food losses, limited infrastructure, and governance issues.
- Moroccan agribusinesses, particularly SMEs, face barriers such as limited market access and regulatory ambiguity, hindering sector transformation.
- The Green Morocco Plan (2008) modernized agriculture, improved GDP and exports, but lacked emphasis on food security and climate adaptation; the Green Generation 2020–2030 aims to address these gaps with a focus on sustainability, resilience, and investment in human capital.

# Land use, climate vulnerability, and critical water scarcity in Morocco

- Desert covers over 65% of Morocco, with 16.5% cropland and 3.8% forested areas
- Since 1980, average temperatures (in cropland areas) have steadily risen, with projections of further increases through 2065.
- These rising temperatures and drought risk threaten agriculture, water resources and livelihoods.



Data Source: ECMWF - ERA5 (Hersbach et al. 2020) and NEX-GDDP-CMIP6 (Thrasher et al. 2012)

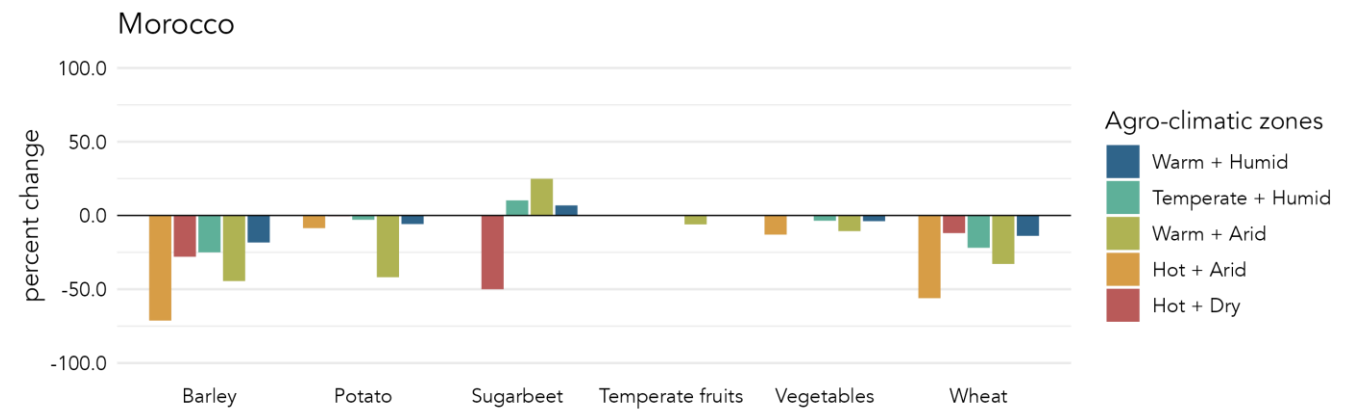
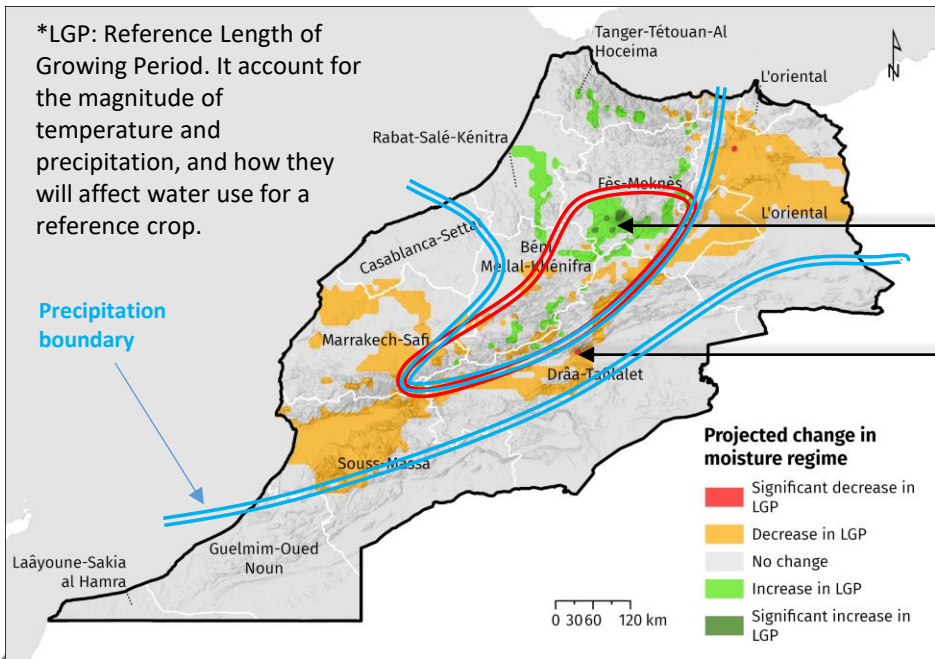
# The potential impact of climate change in Morocco is greater than in other three countries: slower yield growth for wheat, barley, potato and vegetables

## Potential changes (%) in national agricultural outputs in the SEMED under climate change in the near-term (2011-2040)

Some positive effects of warming conditions  
(Increase in growing season in areas previously too cold for farming)

Where warming conditions would reduce farming suitability

	Morocco
Wheat	-22%
Potato	-14%
Barley	-34%
Vegetables	- 6%
Temperate fruit	- 6%
Sugarbeet	+16%



# Morocco's agricultural emissions and National Climate Commitments (NDCs)

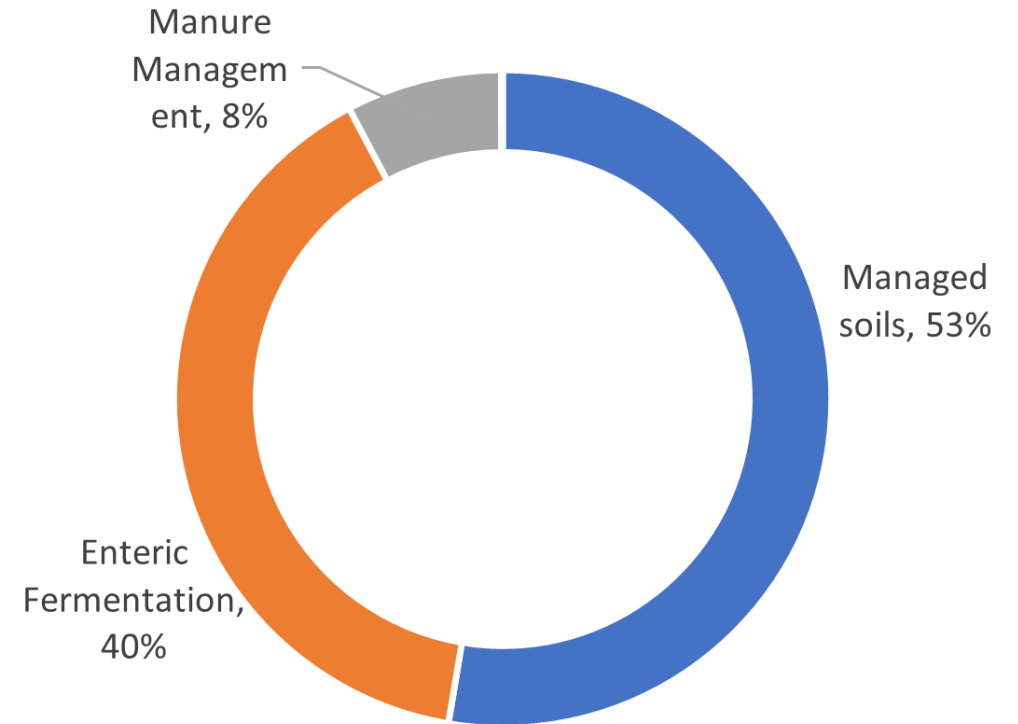
Morocco faces moderate water scarcity, with higher per capita availability than other SEMED countries but below sustainable levels.

Agriculture is largest water consumer, using 85% of total water, with 16% of cropland irrigated.

Main emissions sources include managed soils (53%) and enteric fermentation (40%). Agriculture contributes 14% to Morocco's total emissions, higher than other SEMED countries.

Morocco's mitigation targets focus on extensive arboriculture, rangeland development, and industrial energy reduction (17% by 2030), while aiming for 52% renewable power.

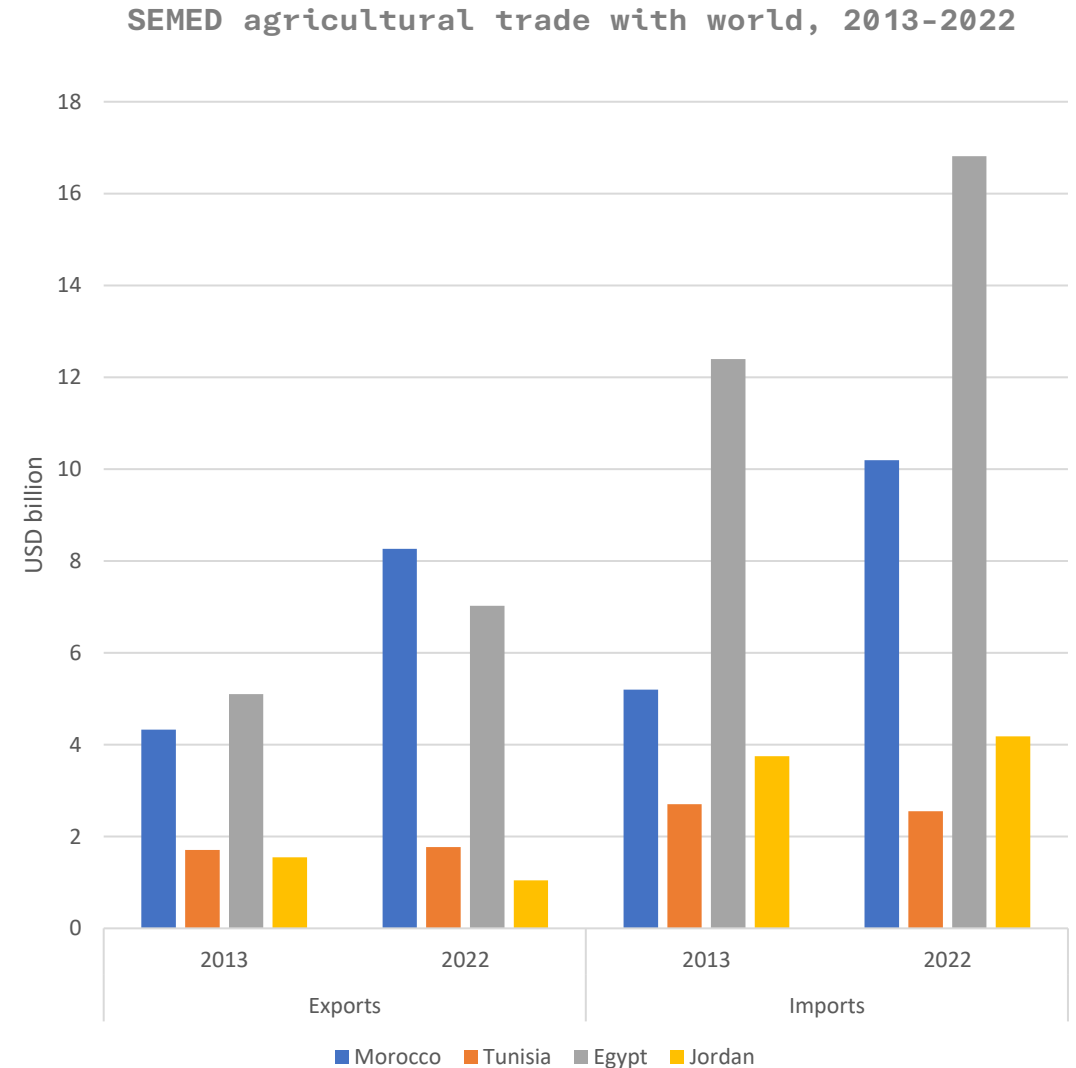
Morocco's climate financing needs reach 6% of GDP, the highest in SEMED, highlighting reliance on international finance to meet adaptation and mitigation goals.



Sources: Latest National Communications to the UNFCCC

## Agri-trade doubled between 2013 and 2022

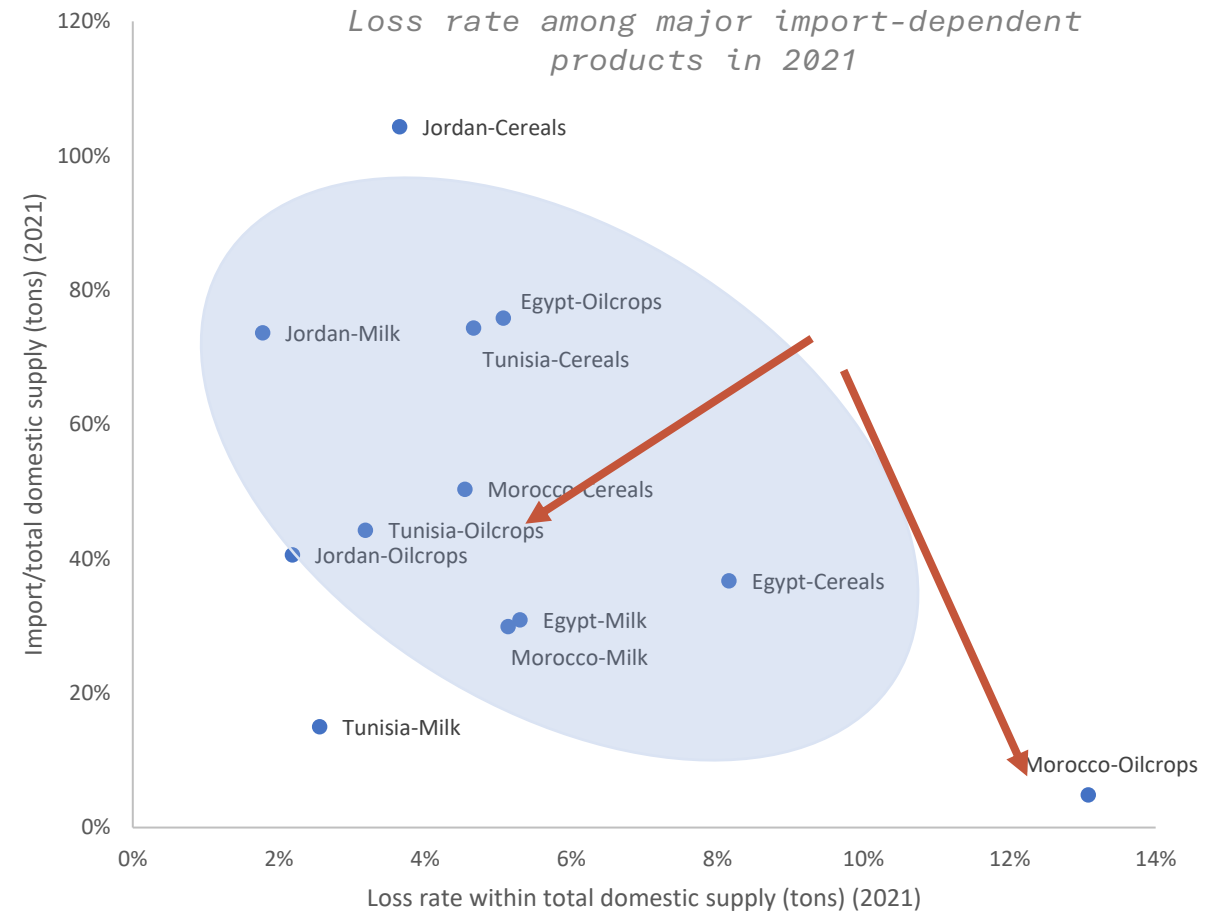
- Relative to GDP, agri-trade deficit in Morocco is 1%, lowest among the four countries.
- Share of cereals in agrifood trade deficit increased by 14pp in Morocco, to 53%, the greatest increase in the region. Represents strain on public budgets due to subsidizing of wheat and bread.
- Morocco relies on only a few suppliers in cereals, from EU (54%), Latin America (29%) and North America (14%), indicating need for diversification.
- Top trade surplus generators are fruits and vegetables (and their preparations, especially tomatoes), fish and crustaceans, and preparations of meat, fish and crustaceans. However, Morocco has a relatively higher concentration of export markets.



Source: International Trade Center (ITC). 2023. *Trade map*.  
<https://www.trademap.org/Index.aspx>

# Morocco's agri-trade dynamics: fertilizer dominance and import logistics

- Morocco leads in fertilizer exports, holding 70% of global phosphate reserves, with 24% annual export value growth in the past five years. Fertilizer exports quadrupled in value terms between 2013 and 2022.
- Agricultural input trade grew threefold, with fertilizer surpluses helping offset overall agricultural trade deficit.
- Significant food losses occur in key imports, with 5% in cereals and 13% in oil crops due to handling inefficiencies.
- Morocco applies moderate tariffs, comparable to regional averages but higher than Egypt and Jordan. Non-tariff measures (NTMs), especially sanitary and phytosanitary standards, are widely used for import-export regulation.



Source: Food and Agriculture Organization (FAO). 2023



- **Food security should remain a top priority and strengthened through continued enhancement of the social protection system.** The government could consider replacing current broad subsidy system with targeted cash assistance for vulnerable households, as this would be more cost-effective and efficient and promoting dietary diversity.
- **Value chains play a crucial role in Morocco's agrifood systems performance.** Enhancing processing, retail, and distribution channels can reduce food loss and increase system efficiency.
- **Climate change and water scarcity present pressing challenges for Morocco.** Building resilient agrifood systems is essential, particularly through the integration of technology to address these issues.

# Thank you

Areej Jafari  
Jacopo Monzini  
Berkin Sener  
Francesca Galiazzo  
Dietmar Uberbacher  
Thales de Haulleville  
Andry Rajaoberison  
Irena Mnatsakanyan  
Steve Goss

