

An aerial photograph of a vast agricultural landscape, likely in Morocco, showing a dense grid of rectangular fields. The fields are covered with various shades of green and brown, indicating different crops and stages of growth. In the top right corner, there is a red and white logo for 'WAR ON WANT' with the tagline 'FIGHTING GLOBAL POVERTY' below it.

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WANT**

FIGHTING GLOBAL POVERTY

BITTER FRUITS

**Trade, labour and inequality in
UK–Morocco food supply chains**

Bitter Fruits: Trade, labour and inequality in UK-Morocco food supply chains

July 2026

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Data analysis and research conducted by Alec Desbordes.

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Cover image: Aerial view of large-scale greenhouse agriculture near Agadir, in Morocco's Souss-Massa region. © alexandrumagurean

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Preface

This briefing traces the story behind the tomato and the raspberry you ate last week. It reminds us that their taste and colour are not simply the products of a particular cultivar: they are material expressions of the labour embodied in each fruit. That labour includes the workers who planted and irrigated seeds in Moroccan greenhouses, the hands that harvested the fruit at peak ripeness, and the continuous movement of people who transport goods, driving trucks and navigating ships that collapse the distance between field and kitchen.

This transnational network of labour is the essence of modern supply chains. Trade routes function as connective arteries, linking individuals across vast geographies and coordinating labour in different regions through a single commodity. While specific routes emerge and fade over time, these shifts reflect more than changing consumer preferences. They reveal the broader global division of labour generated by capital's ongoing search for lower production costs and weaker social protections, particularly in the Global South. Ultimately, this system is structured to maximise profit.

Wages on Moroccan farms remain drastically lower than those of their European counterparts, while weak environmental regulation has led to the overexploitation of water resources and the systematic pollution of agricultural regions

In theory, Morocco holds a comparative advantage in the production of certain fruits and vegetables. **Cultivating tomatoes and berries in the arid regions of southern Morocco enables year-round production due to consistent heat and sunlight, making it significantly more cost-effective than relying on heated greenhouses in Europe.** However, this apparent natural advantage obscures a range of negative impacts associated with such production. Wages on Moroccan farms remain drastically lower than those of their European counterparts; the export-oriented nature of these operations limits their contributions to the development of local social services and infrastructure; and weak environmental regulation has led to the overexploitation of water resources and the systematic pollution of agricultural regions.

British workers and consumers are not bystanders in the dynamics of global trade or in shaping the

conditions faced by agricultural workers and landscapes abroad. The distance between workers in both countries is, in reality, narrow: it is the same tomato that passes through their hands. From this shared connection emerges the potential for solidarity. International solidarity can help ensure that Morocco's economic development does not merely serve national elites or multinational corporations, but instead supports equitable and sustainable outcomes for working communities.

Workers in the vast expanse of greenhouse farms covering Morocco's Souss-Massa region have made their demands for change increasingly clear. **Working conditions have stagnated, even as capital, livelihoods, and land and water 'resources' – our common goods – are increasingly concentrated within export-oriented agribusiness.**

This trajectory cannot be meaningfully described as 'development'.

A fairer model must be grounded in the provision of infrastructure and social services that sustain and enhance labour, enabling countries in the Global South to build resilient and self-supporting economic systems. This includes improved working conditions that protect workers' health and safety – such as reliable transportation and strict oversight of toxic agricultural inputs like pesticides – as well as wages that reflect the true value generated by agricultural labour.

It must also encompass a more just food system, centred on food sovereignty. Such a model would **prioritise territorial food systems, balancing export-oriented production with investment in staple crops** (e.g. cereals and horticulture) for local consumption, rather than focusing on off-season fruits and vegetables destined primarily for UK and EU markets.

This briefing tells the story of these 'bitter fruits', while also highlighting the potential for change behind every fruit and vegetable leaving southern Morocco.

Introduction

The role of trade in food policy in the UK

In 2024, the Department for Environment, Food & Rural Affairs (DEFRA) presented its UK Food Security Report to parliament.¹ This 450-page long document examines global food availability, the UK's food supply sources, and food supply chain resilience, among other themes. It provides a valuable entry point for understanding the country's approach to food security and the role of trade within its broader food policy framework.

The report outlines the UK's level of self-sufficiency, both overall and specifically for fresh fruits and vegetables. In this context, the supply ratio is defined as the share of a given commodity that is produced domestically relative to total consumption. **In 2023, the production to supply ratio for all food stood at 62%, meaning that just under two-thirds of the food consumed in the UK was produced domestically.** The country therefore relies on imports for the remaining share. While the UK is largely self-sufficient in cereals, meat, dairy and eggs, this is not the case for all food categories.

Around 50% of all vegetables and more than 80% of fruit consumed in the UK are imported

The supply ratio is considerably lower for fruits and vegetables. The report finds that, in 2023, the UK's supply ratio for fresh vegetables stood at 53%, while that for fresh fruit was just 16%. In other words, around half of all vegetables and more than 80% of fruit consumed in the UK are imported to supply supermarket shelves.

Significant variations also exist within these categories. The latest available data for 2023 show particularly low production to supply ratios for certain fruits: plums (12%), tomatoes (16%), pears (17%) and raspberries (33%). By contrast, the UK remains largely self-sufficient in crops such as carrots, turnips, swedes and cabbages.

Even when focusing solely on fruits and vegetables, it is clear that **trade plays a central role in the availability of food and in shaping the consumption patterns of British consumers.** Many products depend heavily on overseas production. Moreover, **imports are often sourced from a limited number of highly specialised and geographically concentrated growing regions.**

Morocco is home to one such region. The conditions faced by agricultural workers in the greenhouse farms of Souss-Massa, in the south of the country, are closely bound to the demand generated by British consumers and supermarket supply chains.

Table 1 UK production to supply ratio of fruits and vegetables

Food type	2023
Carrots, turnips and swede	95%
Cabbages	85%
Strawberries	61%
Cauliflowers and broccoli	55%
Lettuce	47%
Mushrooms	45%
Apples	38%
Raspberries	33%
Pears	17%
Tomatoes	16%
Plums	12%

From field to market: the politics of UK-Morocco trade

The UK was a member of the European Union from 1973 for several decades, during which its international trade patterns were largely structured by the European Single Market and the EU's network of free trade agreements with the rest of the world. Morocco's position as a privileged trading partner of the European Union (and, by extension, the UK) was consolidated in the late 1990s. The EU-Morocco Association Agreement, signed in 1996 and entering into force in 2000, progressively liberalised trade between the two parties as part of broader efforts to deepen economic integration across the Mediterranean.

Following Brexit and the UK's decision to leave the EU, ensuring continuity in its international trade relations became a central concern and Morocco was no exception. In 2019, the UK and Morocco negotiated and signed a bilateral association agreement to maintain existing trade flows. A report published that same year summarised the economic relationship between the two countries: Morocco ranked as the UK's 52nd largest import partner, with total trade valued at approximately £1.3 billion. Key imports included electrical machinery, vehicles and apparel, with edible vegetables and fruits ranking fourth and fifth respectively.² **While Morocco may appear to be a relatively minor trading partner overall, it plays a disproportionately significant role in supplying certain commodities.**

This is particularly evident in agriculture.

Morocco's combination of relatively low labour costs and favourable climatic conditions enables year-round production of fruits and vegetables. As of autumn 2025, these imports remain subject to tariff-rate quotas (TRQs), which impose a two-tiered tariff system: lower tariffs apply up to a specified volume, after which higher tariffs are triggered. These measures originate in the earlier EU framework and were designed to protect major European agricultural producers, notably Spain and the Netherlands, from external competition.

However, the United Kingdom does not necessarily share the same incentives to maintain these protections. The UK-Morocco Agreement provides for periodic reviews of agricultural tariffs, and in late 2023 a review process was initiated to explore further liberalisation and strengthen bilateral trade relations.

This process was ongoing as of end of 2025. Within this context, the Moroccan business association, the Confédération Générale des Entreprises du Maroc (CGEM), formally called for the complete removal of quotas on fresh produce exports to the UK, arguing that TRQs artificially restrict supply and "are hangovers from the pre-Brexit era".³

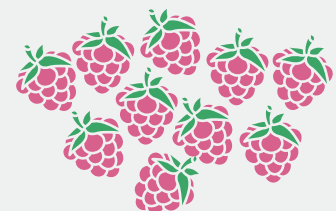
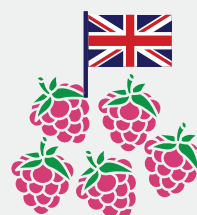
A country of imports: Britain's fruit and vegetable gap

As noted earlier, the UK produces only a limited share of the fruits and vegetables it consumes. Some of these products – notably **tomatoes and raspberries** – are key specialisations of Morocco's export-oriented greenhouse sector. In 2023, the UK's supply ratio stood at just 16% for tomatoes and 33% for raspberries, underscoring a significant reliance on imports.

In just ten years, Morocco has climbed from 27th to 6th place among the UK's fruit and vegetable suppliers: a trade now worth over £620 million



Only 16% of tomatoes and 33% of raspberries we consumed in 2023 were grown in the UK



In 2024, the UK imported over £14 billion worth of vegetable products.⁴ **Morocco has emerged as an increasingly important supplier, rising from 27th to 6th place over the past decade, with fruit and vegetable exports to the UK valued at over £620 million⁵** (figure 1). This places Morocco alongside major agricultural exporters such as Brazil, India and France, highlighting its growing role within the UK food system.

A closer look at trade within sections 7 and 8 of the Harmonised System, covering edible vegetables and fruits respectively, reveals a significant shift in agricultural trade between Morocco and the UK.⁶ The value of this trade has increased dramatically, rising from under £100 million in 2013 to approximately £600 million in 2024 (figure 2). This represents a **fivefold expansion in the value of fruit and vegetable imports from Morocco, highlighting the rapid intensification of its agricultural trade relationship with the UK.** This dramatic expansion is not broad-based, but driven by a handful of commodities, in particular tomatoes and berries.

Figure 1 Major exporters of fruits and vegetables to the UK in 2024

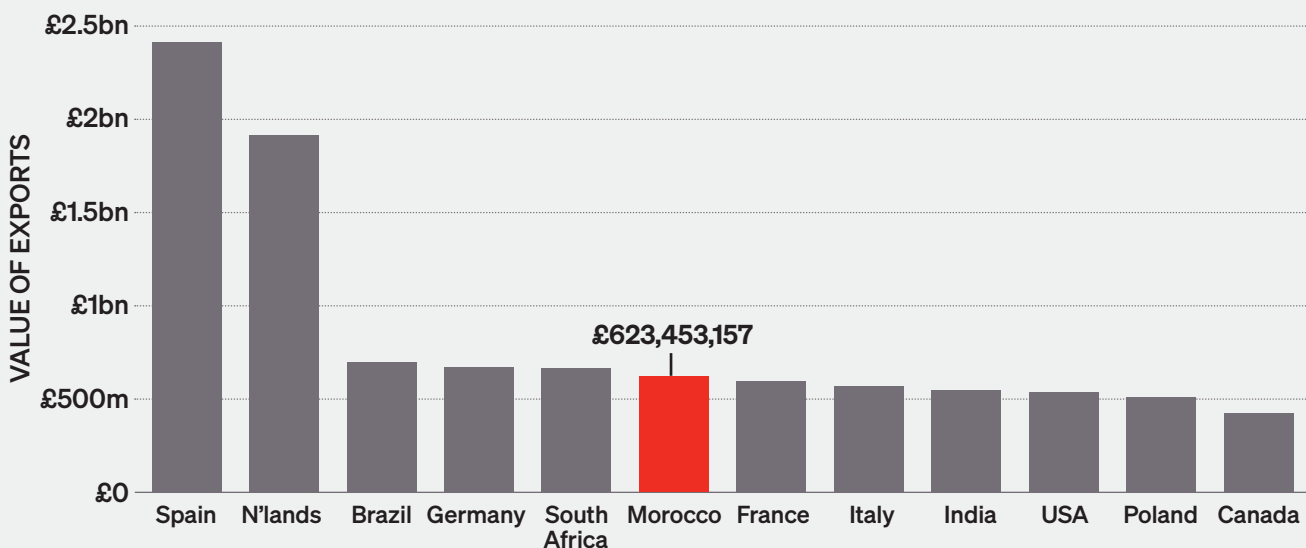
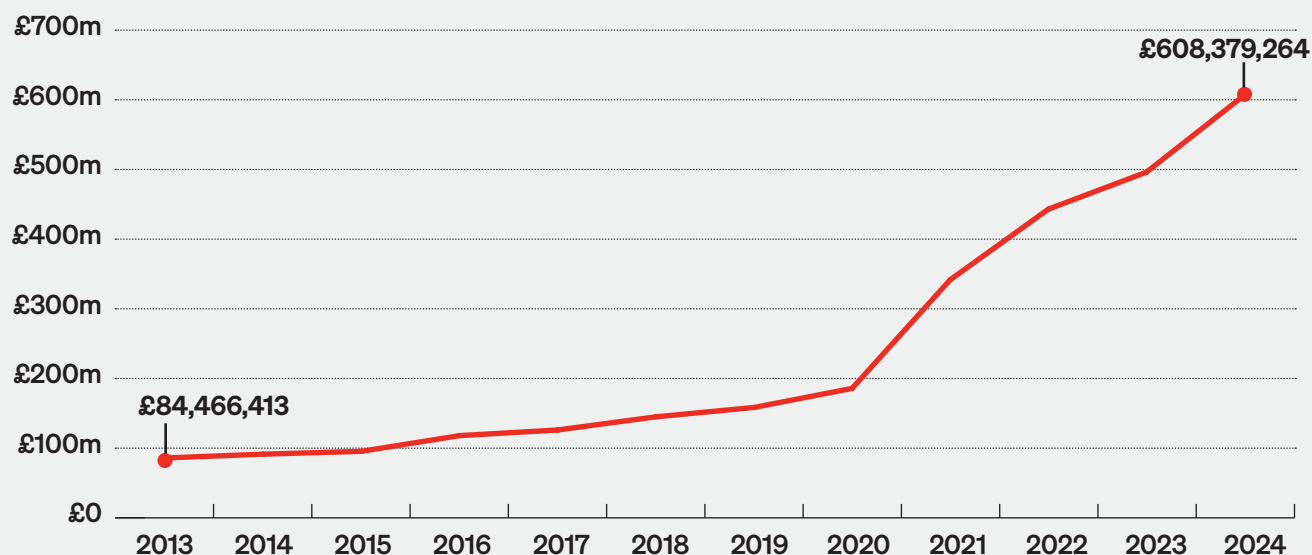


Figure 2 Value of all UK imports of fruits and vegetables from Morocco



Moroccan tomatoes overtake European rivals

The volume of tomatoes imported by the UK from Morocco has risen sharply since the mid-2010s. A decade ago, imports stood at around 50,000 tonnes; by 2024, they had exceeded 130,000 tonnes. As illustrated in figure 3, **this sustained growth has enabled Morocco to overtake Spain and rival the Netherlands**, long considered an agricultural export powerhouse, as one of the UK's leading tomato suppliers.

This expansion began prior to Brexit and cannot be attributed solely to the reconfiguration of trade routes that followed. Until 2019, Spain and the Netherlands effectively balanced one another in supplying the UK market year-round. However, from 2020 onwards, both countries experienced a simultaneous decline in market share, creating space for Morocco to emerge as a dominant exporter.

This growth is underpinned by **Morocco's capacity to produce winter tomatoes in large-scale greenhouse operations, particularly in the Souss-Massa region**. Such production is not viable under the UK's natural climatic conditions, while domestic alternatives, such as heated greenhouses, are both energy-intensive and costly.

Moroccan producers, alongside corporate actors in the agricultural sector, have capitalised on this shift by specialising in higher-value varieties, including non-round and cherry tomatoes, which include price premiums. By 2024, this trade alone was valued at £169 million, accounting for approximately 8.6% of total UK imports from Morocco.

A new monopoly on British berry consumption

A similar, though even more pronounced trend can be observed **in the UK's berry supply, particularly within the category that includes raspberries, blackberries, mulberries and loganberries**. At its peak, Spain dominated this market, exporting around 20,000 tonnes annually to the United Kingdom. This position began to shift in 2020 as Morocco rapidly expanded its presence. It now exports volumes comparable to Spain at its height and accounts for more than half of all berry imports into the UK.

Tomatoes and berries combined make up more than 15% of Morocco's exports to the UK

By 2024, the value of berry imports had reached £147 million, representing approximately 7.5% of total UK imports from Morocco. Tomatoes and berries combined make up more than 15% of Morocco's exports to the UK, underscoring the concentration of trade in a small number of high-value agricultural commodities.

Strawberries, however, stand apart from this broader pattern. The UK produces a significant share of its own supply, while Spain remains the leading external supplier, accounting for roughly half of the country's imports.

© Ed Rooney / Alamy



Figure 3 Major exporters of tomatoes to the UK

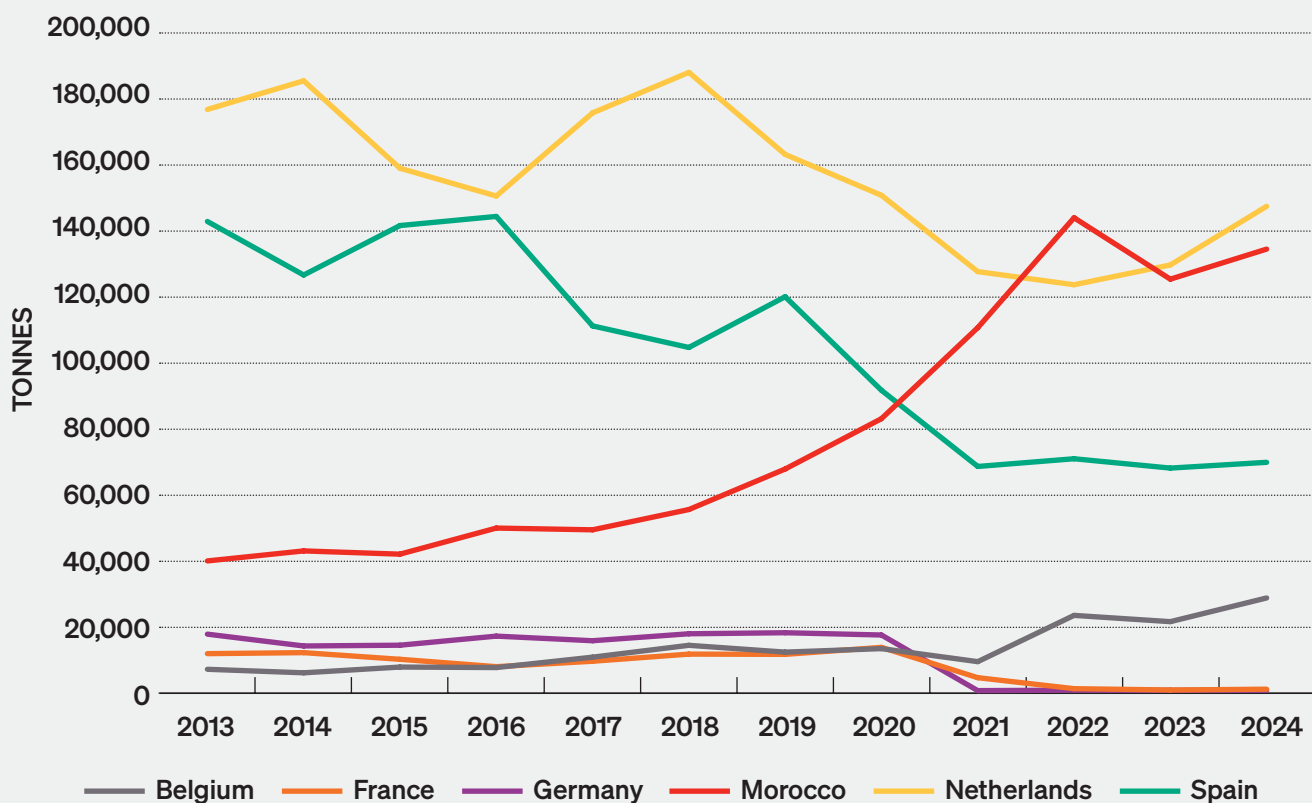
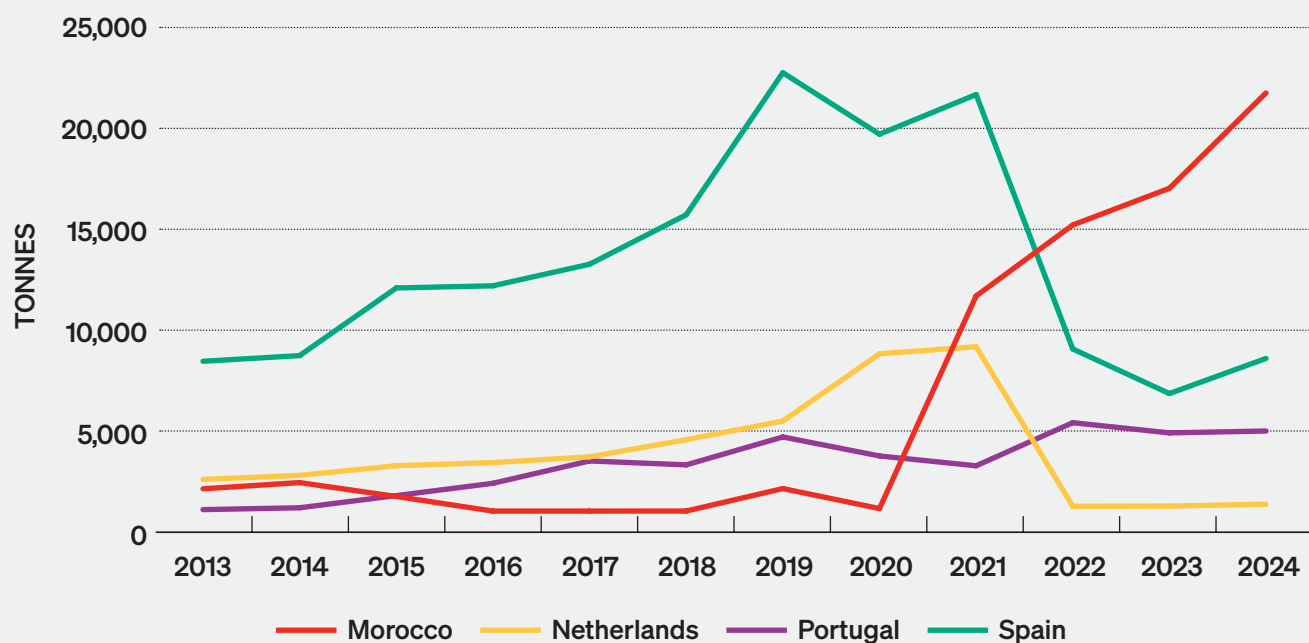


Figure 4 Major exporters of raspberries to the UK



Inside Morocco's export-oriented agricultural hub

Greenhouse megafarms dedicated to the production of tomatoes, berries, citrus, and other fruits and vegetables are highly concentrated in the province of Chtouka-Aït Baha within the Souss-Massa region (see figure 5).

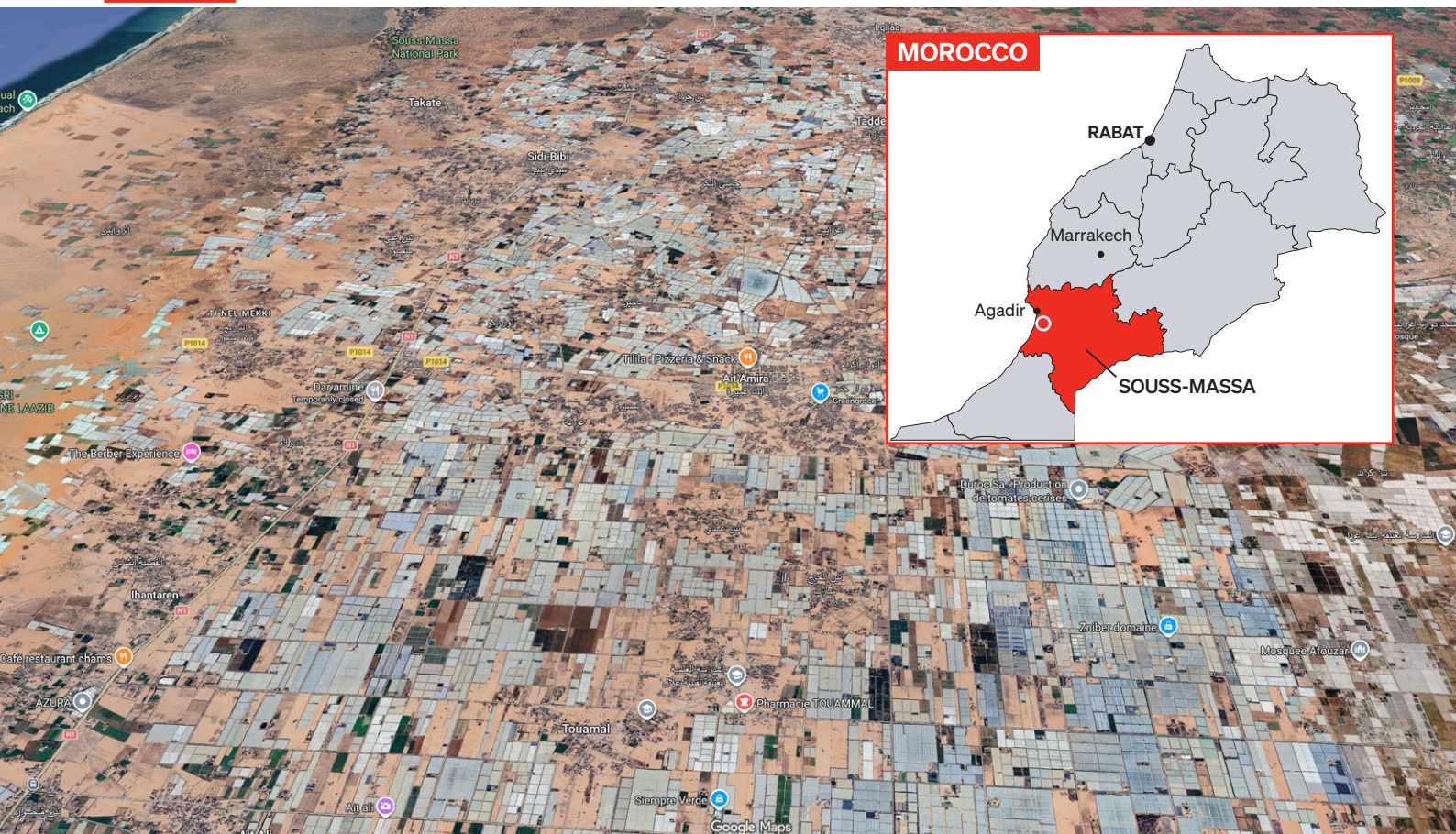
This region specialises in high value-added products such as cherry tomatoes, which command significantly higher retail prices than standard round varieties. Morocco is now the world's fourth-largest exporter of tomatoes, well behind Mexico but increasingly close to major European producers such as the Netherlands and Spain.

Corporate giants: Azura, Duroc and others

This production model is dominated by a small number of large corporate actors. Azura, a Franco-Moroccan agricultural company founded in 1988, employs around 18,000 workers globally. It operates a major logistics platform in Perpignan, France, through which produce is redistributed across Europe. In 2023, the company reported revenues of approximately £435 million. Azura owns 55 farms covering 1,200 hectares and produces around 180,000 tonnes of tomatoes annually.⁷

These figures illustrate the high degree of concentration within the export-oriented agricultural sector in Souss-Massa. **Azura alone produces more tomatoes than the total volume that Morocco exports to the United Kingdom.**

Figure 5 Greenhouse megafarms of Souss-Massa



Imagery © 2026 Airbus, Data SIO, NOAA, U.S. Navy, NGA, GEBCO, Landsat / Copernicus, imagery © 2026 Airbus, CNES / Airbus, Landsat / Copernicus, Maxar Technologies. Map data © 2026 Google

Another dominant actor is Duroc, established in 1989 and now a subsidiary of the Delassus Group. The company produces and exports approximately 80,000 tonnes of tomatoes each year. A deputy general director of Delassus stated that Duroc holds an estimated 28% share of the UK tomato market.⁸ This market penetration is supported by 620 hectares dedicated to tomato production.⁹

Together, Azura and Duroc exemplify the extreme concentration of export-oriented farming in Morocco. Smaller producers are largely marginalised and often consolidate into cooperatives in order to remain competitive. Comaprim, for example, brings together 35 mid-sized growers into a 400-hectare operation exporting around 33,000 tonnes to the UK market.¹⁰ In such a highly competitive environment, the space for truly small-scale, independent producers is clearly limited.

Tomatoes at a discount

Moroccan megafarms have sustained and expanded their export market share in part by offering lower prices than most European competitors. While pricing varies by variety, Morocco has successfully positioned itself to supply premium tomato products at comparatively lower cost.

This advantage reflects relatively stable – and in some cases declining – production costs. By contrast, European producers have experienced greater volatility, particularly in the wake of rising energy prices.

These megafarms' cost competitiveness is largely underpinned by access to low-cost seasonal labour and comparatively weak environmental regulation.

In 2024, the average price of a kilo of tomatoes imported from Morocco stood at £1.02: approximately 23% lower than Dutch tomatoes and 35% lower than Spanish equivalents in the same year

Port of Agadir: the primary export hub

The port of Agadir is the closest export hub to the farms of Souss-Massa and serves as the primary gateway for fruits and vegetables produced in the region. According to the Moroccan National Ports Agency, more than 100,000 tonnes of produce now transit through the port annually.¹¹

Agadir is, by a wide margin, the country's main maritime export route for fresh produce. Of the more than 120,000 tonnes exported via Moroccan ports in 2024, over 85% passed through Agadir. Even this substantial maritime flow represents only part of Morocco's total exports, as a significant share of produce is also transported overland, particularly via the Strait of Gibraltar.

Figure 6 Average price of UK tomato imports by country of origin

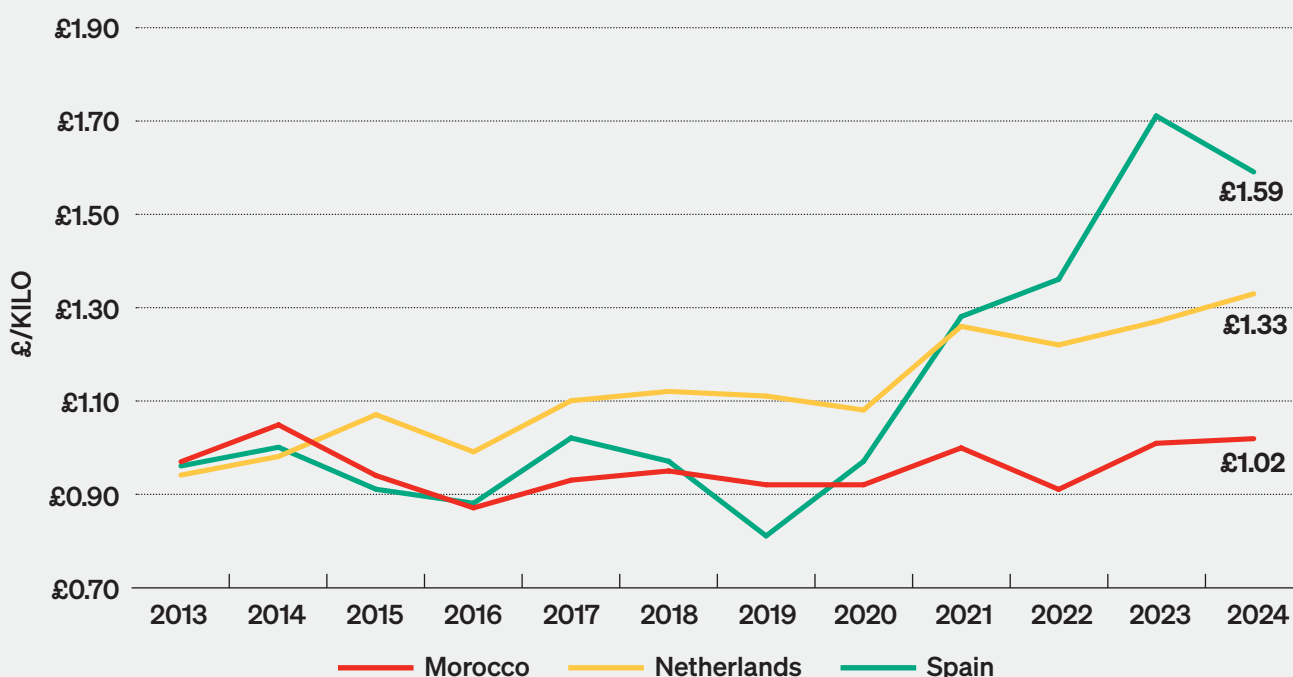
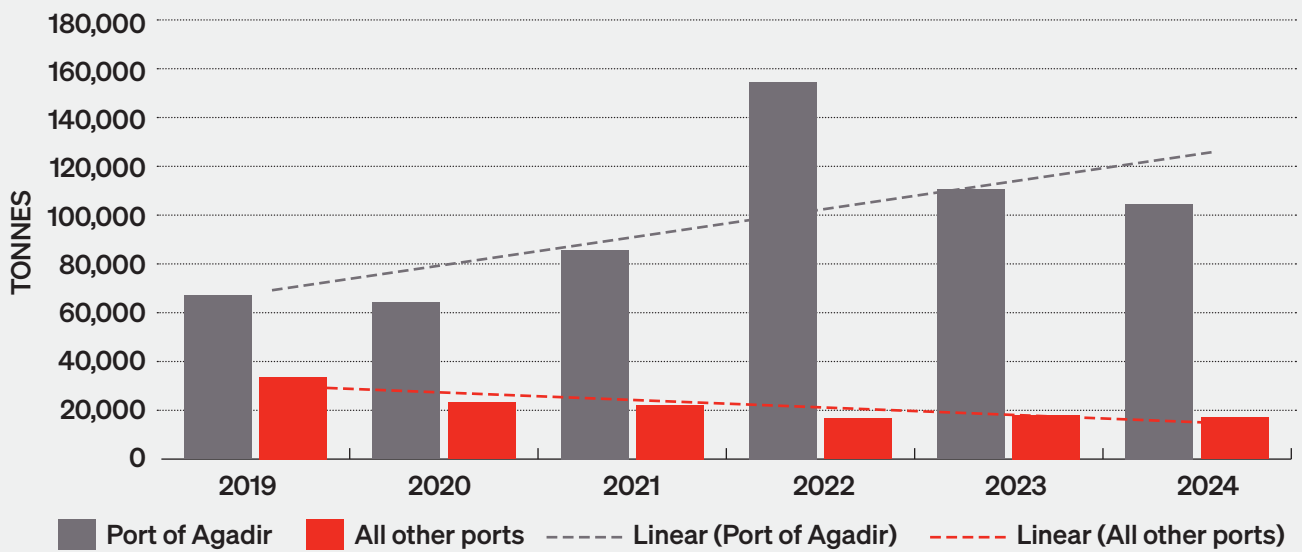
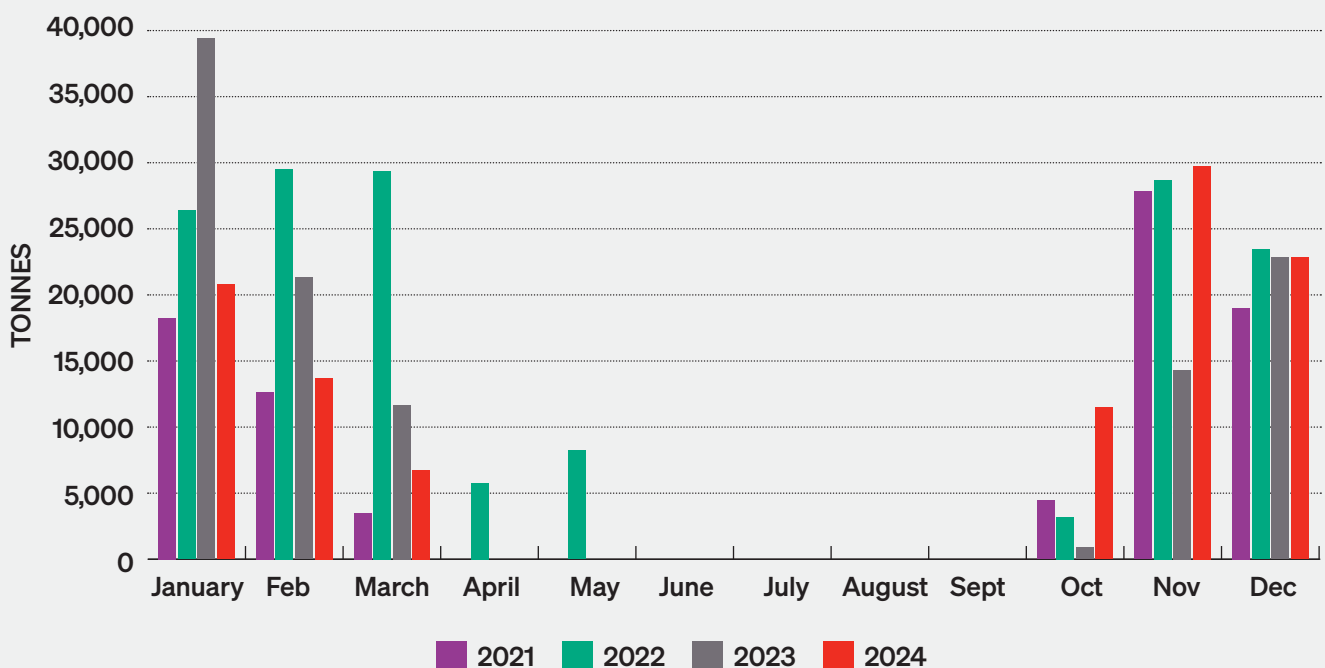


Figure 7 Moroccan export of citrus fruits and early vegetables by port



Exports are highly seasonal, concentrated between October and March when European production is constrained by winter conditions. The peak months are November, December and January, during which volumes passing through Agadir can reach up to 30,000 tonnes per month. Figure 8 illustrates this pronounced seasonal pattern and underscores Morocco's role as a key winter supplier to European markets.

Figure 8 Export of fruits and vegetables at the Port of Agadir per month





The commercial shipping port of Agadir, the main export gateway for fruits and vegetables produced in the region.

New maritime routes

The journey from Moroccan farms to British supermarket shelves depends on a time-sensitive logistics network designed to maintain freshness. In recent years, dedicated maritime routes have been established to connect Moroccan ports directly with key UK entry points, streamlining a supply chain that previously relied heavily on transit through Spain. Private operators have played a central role in developing these routes, responding to – and accelerating – the rapid growth in agricultural trade between Morocco and the United Kingdom.

In 2021, the shipping start-up United Seaways introduced a new route linking the port of Tanger Med in northern Morocco to the port of Poole in southern England. This service reduces transit time to approximately three days, compared to around six days via combined road and ferry transport. However, it still requires overland trucking from the agricultural hubs of Souss-Massa to Tanger Med.

In January 2024, the Dutch operator WEC Lines launched a direct maritime connection between Agadir and the port of Liverpool. Vessels operating on existing routes between the UK and the Canary Islands can now return carrying refrigerated goods, with additional capacity to load containers in Spain and Portugal en route from Agadir. This marks the first direct shipping link between Agadir and Northwest England.

More recently, in August 2025, the Icelandic shipping company Samskip introduced the Moroccan Refrigerated Service (MRS) connecting the ports of Agadir and Casablanca to London Thamesport in the UK and to Rotterdam on the European continent. This service further strengthens the cold chain logistics network underpinning the trade in perishable agricultural products between Morocco and northern Europe.

Table 2 Recently opened maritime routes between Morocco and the UK

Route	Operator	Launch date
Tanger Med – Poole	United Seaways	2021
Agadir – Liverpool	WEC lines	2024
Agadir/Casablanca – London Thamesport	Samskip	2025

From Moroccan farms to British supermarket shelves

Supermarkets, under increasing public scrutiny, occasionally publish lists of their suppliers. These documents are valuable sources for tracing the links between retailers and their agricultural producers. However, the absence of standardised reporting requirements makes comparison and analysis challenging. Despite these limitations, this research draws on Tier 1 supplier lists from Tesco, Sainsbury's and Asda.

Together, these three retailers account for 55% of the UK grocery market.¹² All have disclosed supply relationships with Moroccan megafarms. These greenhouse operations are therefore not remote or isolated sites of production, but **integral components of the supply chains that stock the UK's largest supermarkets.**

Table 3 Tier 1 suppliers to UK supermarkets

Tier 1 supplier	Tesco	Sainsbury's	Asda
Agrafresh		X	
Azura	X	X	
Comaprim	X		X
Duroc/Delassus	X	X	X
Emporio Verde	X		X
Quality Bean	X		

The fact that all three of the UK's largest supermarkets – Tesco, Sainsbury's and Asda – list either Duroc or Azura as Tier 1 suppliers **highlights the high degree of concentration within the supply chain.** A small number of large Moroccan producers are directly supplying the British market, making their labour practices an immediate concern for both workers and consumers in the UK.

Tomatoes from Morocco on sale in Morrisons supermarket



© Andy Solomon / Alamy

The role of social audits: a worker's perspective

Social audit assessments of Moroccan megafarms, provided by private auditing firms, are intended to ensure compliance with labour and ethical standards. However, workers' testimonies point to a significant gap between corporate commitments and lived reality.

War on Want's local trade union partners, the SDA (*Syndicat Démocratique de l'Agriculture*), conducted an independent worker survey in 2024 aimed at uncovering conditions that corporate audits tend to overlook. This survey seeks to document the everyday realities faced by agricultural workers employed on Morocco's large export-oriented farms. The findings presented below illustrate why social audits are often perceived as ineffective, and why they fail to provide meaningful protection.

Unsurprisingly, agricultural workers in the Souss-Massa region receive particularly low wages, which are insufficient to cover basic living and family expenses. For context, the guaranteed minimum agricultural wage (*SMAG – Salaire Minimum Agricole Garanti*) was set at 2,255 dirhams net per month, or 93 dirhams per day, as of 1 April 2025. This is equivalent to approximately £7.55 per day, or £183.22 per month. Such poverty-level wages leave workers with little choice but to take on debt to meet everyday needs or make significant personal sacrifices to make ends meet.

Social services are severely lacking in the region of Souss-Massa. **Neither employers nor government ensure childcare**, which causes great organisational difficulty for workers with young children. **Medical services within the farms are non-existent or insufficient, while public medical services are also inadequate.**

Workers are regularly exposed to agrochemicals such as pesticides without adequate protective equipment or information about the substances they are handling

The health and safety of workers are constantly put at risk. Workers are regularly exposed to agrochemicals such as pesticides, without adequate protective equipment or minimal information about

the substances they are handling. Often, labels on the pesticides' bottles are removed. Health and safety committees, when they exist, have no power to mitigate the dangerous work conditions that are prevalent throughout the farms.

In addition, **workers are transported from their towns to the farms in poorly maintained buses and trucks, often over roads that are themselves in disrepair.** These unsafe conditions make the daily commute both arduous and hazardous. Workers are frequently forced to travel standing in overcrowded vehicles, packed tightly together, which not only increases the risk of accidents but also exposes women in particular to harassment. The journeys are long and uncomfortable, contributing to fatigue, stress and broader health concerns, with direct consequences for workers' wellbeing and productivity.

Members of trade union committees have faced reprisals, including dismissal, across several large farms



Above and next page: Members of the SDA union protesting outside Duroc Farm against union-busting and in solidarity with a worker dismissed following his affiliation with the union. © SDA Morocco



Trade union recognition and worker representation remain highly dependent on the balance of power between employees and employers. In practice, **workers who attempt to organise are often targeted and penalised. Testimonies indicate that members of trade union committees have faced reprisals, including dismissal, across several large farms.**

In its 2024 supplier list, Sainsbury's reports on the presence of trade unions within its supplier companies (below).¹³ Suppliers are given the option not to respond, to state that no request for union recognition has been made, or to indicate the presence of a company union, a state-affiliated union, or a free and independent union.

In the Souss-Massa region, Sainsbury's identifies at least three farms – Delassus (the parent company of Duroc), Comaprim, and Agafresh – as having company 'unions'. **Company 'unions' are organisations that are largely influenced or**

controlled by management, limiting or preventing them from fulfilling their representative function.

As such, they are prohibited under international labour law, notably Article 2 of the ILO Conventions for the Right to Organise and Collective Bargaining (Convention no. 98) and the Right to Freedom of Association (ILO Convention no. 87). It is therefore notable that Sainsbury's reports the presence of such arrangements without systematically addressing the associated restrictions on freedom of association.

Taken together, these findings demonstrate the failure of social audits commissioned by British supermarkets to meaningfully improve the lives and working conditions of Moroccan agricultural workers. In practice, **these mechanisms do little to challenge existing power structures, allowing harmful conditions to persist.** Farm owners face few incentives to address these issues, as the prevailing model prioritises the extraction of maximum value from both labour and land.

Lower Hope	Marsh Court Farm Pencombe Bromyard Herefordshire Unit	Other food service activities
QINGDAO TANFORD FOC	133, Shuangyuan Road, Chengyang District, Qingdao China	Raw fish products & preparations
COMAPRIM	Tin Mensour, Chtouka Ait Baha Belfaa Morocco 80250	VMGLOBALG.A.P, Fruits, vegetables and
Bakkavor Salads Bourne	Spalding Road Bourne Lincolnshire United Kingdom PE10 0	Salad Pots
H Weston & Sons Ltd	Much Marcle Ledbury Herefordshire United Kingdom HR8 2	Alcoholic drinks and fermented/brewed p

245 Lower Hope Fruit Ltd	No, we have not received a request to recognise a union	Yes, with freely elected representatives
276 QINGDAO TANFORD FOC	Yes, free and independent union	Not Applicable
484 COMAPRIM	Yes, company union	Not Applicable
1785 Bakkavor	Yes, free and independent union	Not Applicable
262 H Weston & Sons Ltd	No, we have not received a request to recognise a union	Yes, but it does not meet regularly

Conclusions

The journey of a winter tomato or a raspberry from a Moroccan greenhouse to a British plate is **a story of modern global trade in our food systems: shaped by logistics, profits and consumer demand, and detached from the reality of local, sustainable food systems.** This briefing has traced that journey, revealing a supply chain that has undergone rapid and far-reaching transformation. The data points to a decisive shift between 2020 and 2021, when Morocco moved from being a significant supplier to a dominant force in the UK's winter produce market. This rise has been enabled by deepening commercial and political ties, alongside the development of dedicated maritime routes.

Testimonies from workers reveal a consistent pattern: poverty wages that entrench debt, dangerous exposure to agricultural chemicals, and transport conditions that undermine dignity and safety

Yet this efficiency comes with a bitter taste. The competitive pricing of Moroccan tomatoes and berries is not simply a result of favourable climate conditions; it is rooted in a production model that externalises its social and environmental costs. Testimonies from workers in Souss-Massa reveal a consistent pattern: poverty wages that entrench debt, dangerous exposure to agricultural chemicals, and transport conditions that undermine dignity and safety. The megafarms – such as Azura and Duroc – that drive export growth and supply major UK supermarkets operate within a system where such conditions persist.

This briefing has exposed the failure of current voluntary due diligence mechanisms to address this imbalance. Corporate social audits, intended as a tool of accountability, act rather as a box-ticking exercise that fail to alter the material conditions of workers. At the same time, the lobbying efforts of Moroccan business associations like the CGEM to entirely eliminate tariff-rate quotas demonstrate a push for further liberalisation, disconnected from commitments to increase labour or environmental standards. This leads to a scenario where supply chains become more integrated and efficient for capital, while becoming increasingly precarious for labour.

British supermarkets must move beyond ineffective auditing practices and require living wages and safe working conditions as non-negotiable standards

The same trade agreements, logistics networks and supermarket abundance that deliver affordable produce to British consumers also uphold a system that withholds a fair share of value from Moroccan agricultural workers. This interdependence is not neutral: it is structured by inequality.

This interdependence also carries a risk that extends beyond questions of fairness. The UK's reliance on imported, just-in-time horticulture is not only a structural imbalance: it is a climate vulnerability. A 2026 UK government national security assessment warned that global ecosystem degradation and collapse threaten the country's access to food and economic stability, with impacts such as crop failures and intensified natural disasters already underway.¹⁴ Southern Morocco's greenhouse regions, which supply much of Britain's winter produce, are themselves exposed to worsening drought and water stress. A food system built on speed, cost and exploitation of workers and nature, rather than food sovereignty and climate justice, leaves both countries more exposed to the shocks ahead.¹⁵

This situation is not inevitable. It reflects a series of political and economic choices that prioritise cost, speed and convenience, while marginalising the people who produce the food.

British supermarkets, as direct beneficiaries of these supply chains, have the capacity and responsibility to move beyond ineffective auditing practices and require living wages and safe working conditions as non-negotiable standards.

Similarly, **policymakers must ensure that trade agreements include enforceable protections for workers' rights, preventing a race to the bottom.**

Ultimately, supply chains do not simply connect 'commodities': they connect people. The distance between those who grow food and those who consume it is shorter than it appears. Recognising this interdependence opens the possibility for solidarity across borders, ensuring that the fruits of Moroccan labour are no longer bitter, but shared more fairly.

Annex: Methodology note

This research is the result of a multilevel exploratory approach to trade relations between the United Kingdom and Morocco, specifically concerning export-oriented agricultural products. Its aspiration is to uncover the nature and evolution of trade routes between both countries for fruits and vegetables by tracing a path from the Moroccan farms to the British grocery stores.

The use of varied first and second-hand sources is necessary to assemble a puzzle of which some pieces are deliberately hidden. This work uses institutional reports and publications to clarify the political and economic ties between the United Kingdom and Morocco. These first-hand sources, such as the UK-Morocco Association Agreement, the Moroccan National Ports Agency annual report, or the UK Food Security Report, paint a general trend and deliver institutional context which we refer to, albeit with caution, throughout the report.

Macroeconomic trade data further enables the reader to visualise and understand trade relations between the United Kingdom and Morocco. All trade data are extracted from the United Nations ComTrade database,¹⁶ which gathers detailed import and export statistics reported by national statistical authorities.

Throughout our report, we use the Harmonised Commodity Description and Coding System, also known simply as the *Harmonised System* (HS), to identify and categorise products. Our focus will be on section 2 of the HS, which covers all vegetable products. A preliminary examination of general agricultural trade patterns (volume and value) between the United Kingdom and Morocco revealed the following commodities to be major interlinkages between British consumers and Moroccan agricultural workers:

Table 4 Harmonised System codes for a selection of commodities

Section 2: vegetables products	HS06 to HS14
Edible vegetables and certain roots and tubers	HS07
Tomatoes, fresh or chilled	HS 0702.00
Edible fruit and nuts; peel of citrus fruit or melons	HS08
Strawberries	HS 0810.10
Raspberries, blackberries, mulberries, and loganberries	HS 0810.20

Specific import-export routes and direct relationships between British and Moroccan companies are more difficult to uncover than national trade routes. Supplier lists are a good first step in linking supermarkets directly to specific Moroccan farms. There are certain limitations, however; not all UK supermarkets disclose their supplier lists, and where they do, these lists are challenging to analyse and have shown discrepancies with field observations carried out in the supermarket themselves.

All values are calculated and shown in British pounds (GBP or £). Annual average exchange rates between GBP and Moroccan Dirham (MAD) and GBP and United States Dollar (USD) were sourced from OFX, a reputable foreign exchange service provider. These averages are used to convert trade values for consistency across yearly comparisons and avoid the volatility of daily rates.

Table 5 Yearly average exchange rate of GBP to MAD and USD

Year	Value of 1 GBP in MAD	Value of 1 GBP in USD
2013	MAD 13.151301	USD 1.564768
2014	MAD 13.849283	USD 1.647701
2015	MAD 14.906275	USD 1.528504
2016	MAD 13.289584	USD 1.355673
2017	MAD 12.496923	USD 1.288611
2018	MAD 12.525855	USD 1.334801
2019	MAD 12.276893	USD 1.276933
2020	MAD 12.174778	USD 1.284145
2021	MAD 12.368109	USD 1.375083
2022	MAD 12.687267	USD 1.237188
2023	MAD 12.599775	USD 1.243779
2024	MAD 12.695736	USD 1.277925
2025	MAD 12.307064	USD 1.318508

Finally, from a qualitative perspective, the description of agricultural working conditions presented here draws directly on workers' own testimonies.

War on Want's partner, the SDA union, conducted a survey over a period of more than four months, combining individual interviews with group discussions among members of a local branch in the Souss-Massa region. This body of evidence highlights the most pressing issues and adverse conditions faced by the workforce employed on Morocco's export-oriented megafarms.

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