



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 10/02/2001

GAIN Report #MO1019

Morocco

Fishery Products

Annual

2001

Approved by:

Merritt Chesley

U.S. Embassy, Rabat, Morocco

Prepared by:

Aziz Abdelali

Report Highlights:

The Morocco-EU Fishing Agreement has not been renewed, which strengthens Morocco's position as an exporter of cephalopods. The Ministry of Fisheries took several measures to limit the catches of octopus and to increase its export prices.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rabat [MO1], MO

Table of Contents

Executive Summary 1

Production 1

Trade 2

Policy 2

 Morocco-EU Fishing Agreement 2

 Resource Management 3

Production

Morocco's cephalopod catches continue to be dominated by octopus (up to 3/4 of the total landings of cephalopods). Squid (calamari and cuttlefish) catches continue to be affected by policies meant primarily to control catches of octopus, and by the octopus market since it accounts for the major source of revenue for fishing companies.

Cephalopod catches increased considerably in 2000 in line with the upward trend recorded during the past few years. Most of the increase in cephalopod landings in 2000 came from the deep-sea trawlers, with catches of squid nearly doubling. Total catches in 2001 are expected to be slightly lower since the GOM imposed a maximum allowable catch for octopus of 85,000 MT (see Policy section).

Moroccan Cephalopod Catches (Metric Tons, live weight)

Calendar Year	1998	1998	1999	2000
Deep-Sea Cephalopod Fishing	46,211	62,986	78,707	97,909
- Calamari	5,409	8,208	6,842	13,478
- Cuttlefish	14,963	13,608	18,984	30,273
- Octopus	25,839	41,170	52,881	54,158
Coastal Cephalopod Fishing ^(a)	17,752	22,109	33,719	49,717
- Calamari	3,580	3,144	1,283	1,954
- Cuttlefish	1,824	1,061	1,184	2,531
- Octopus	12,348	17,904	31,252	45,233
Total Deep-Sea & Coastal Fishing	63,963	85,095	112,426	147,626
- Calamari	8,989	11,352	8,125	15,432
- Cuttlefish	16,787	14,669	20,168	32,804
- Octopus	38,187	59,074	84,133	99,391
SQUID (Calamari & Cuttlefish)	25,776	26,021	28,292	48,235
Estim. Production (PSD figure)^(b)	32,000	28,000	30,000	50,000

Source: Ministry of Fishery, National Fishery Office (ONP)

(a) includes some catches from rowboats: Official GOM figures take into account only fish that are marketed through official channels. Catches from an estimated 5,000 small rowboats from villages along the Atlantic coast are not all included in the GOM data. Since these catches are believed to be significant AgAtt has inflated the GOM squid figures in order to avoid inconsistencies in the PS&D table.

(b) AgAtt Estimates to take into account catches not accounted for.

Cephalopod fishing in Morocco is done by three types of boats:

- 1) The deep-sea cephalopod fishing fleet with 291 trawlers account for two-thirds of the catches. These are relatively modern steel boats equipped with freezing equipment. Catches from these boats are

sorted, frozen and prepacked on board for exports. Deep-sea trawlers stay out to sea for up to three months.

2) Coastal cephalopod catching fleet is made up of an estimated 40 wooden boats that are much smaller, more traditional, and lack refrigeration equipment which forces them to unload their catches very often. About 95 % of the catch of these boats are frozen on land for export, the remainder being used directly in the local market.

3) There are an estimated 5,000 small rowboats fishing along the Atlantic and Mediterranean coasts whose catches are frozen inland for export but also used in the local market.

Trade

Morocco's squid exports continue to be concentrated on the EU market (Spain, Italy) and Japan. As octopus account for most of the catches, revenues from export depend largely on octopus prices and thus on the demand from Japan. Since, Morocco did not renew the Fish Agreement with the EU, Moroccan fishing companies are believed to be in a better position to affect the octopus supply and prices for octopus. For the past few year, the few Japanese buyers were successful in lowering significantly the world prices for octopus which led the GOM to take several measures to boost export prices up (see policy section).

In 2000, Export of squids increased considerably reflecting the larger landing of squids this year. Exports are expected to remain high as the EU boats are no longer permitted to fish in Moroccan waters.

Policy

Morocco-EU Fishing Agreement

After several rounds of negotiations, the EU failed to convince the GOM to re-implement the Fishing Agreement. Morocco requested that the number of fishing licenses granted to EU boats be reduced significantly and that all fish catches by EU boats be first downloaded in Moroccan ports for control purposes. More importantly, Morocco was looking to sign an agreement that would boost joint ventures with the EU fishing industry and would result in increasing the value added and reducing the catches.

Resource Management

Over the past decade, the GOM has been taking several measures to preserve and better manage its fish resources. These include banning increases in fishing capacity and strictly controlling installation or expansion of fish freezing packing houses. In addition, the GOM has limited the minimum mesh size for deep-sea and coastal-fishing trawlers. In 1996, the GOM imposed restrictions on fishing gear used by small rowboats.

More recently, on May 2001, the Moroccan Ministry of Fishery took several measures to limit octopus catches

and increase the export prices during the 2001-2003 period:

- A maximum allowable catch for octopus of 85,000 MT has been implemented. This quota has been divided between fishing boat categories as follows:

- Large cephalopod trawlers/freezers 44,000 MT of octopus
- Coastal fishing boats 6,000 MT of octopus
- Artisanal rowboats 28,000 MT of octopus

The remaining 7,000 MT is allocated between the three groups depending on the prevailing market and catch situations. This quota does not apply to squids (calamari & cuttlefish) and other white fishes.

- Minimum Export Price for Octopus: The GOM set a minimum price of 25 dirhams per kilogram (\$2.20/Kg) for sales of octopus to exporting packers. Large trawlers are not allowed to export octopus at less than \$3.80 to \$5.00/Kg depending on the size category. This measure was taken in an attempt to force buyers (especially Japan) to offer high prices for Moroccan octopus. This measure does not apply to squids and other white fish but is relevant since octopus largely determines the revenues of fishing companies. Octopus exporting companies (packers) expressed concern about this measure, which will limit the price competitiveness of Moroccan octopus in the export market.

- Fishing bans: In addition to the traditional fishing ban (September and October), during the past few years the GOM has imposed a fishing ban during March and April of each year. On May 2001, the GOM announced that the March-April total ban will be replaced by a closing of a specific area (24°N20' to 25°N20') within the 40-mile strip during this period. These bans apply also to squid since they are caught by the same trawlers and rowboats.

*

PSD Table						
Country	Morocco					
Commodity	Squid/Cuttlefish				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	3000	3000	2000	5000	1000	2000
Total Production	32000	50000	32000	45000	0	45000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	35000	53000	34000	50000	1000	47000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	31000	42933	31000	43000	0	41000
TOTAL Exports	31000	42933	31000	43000	0	41000
Domestic Consumption	2000	5067	2000	5000	0	5000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	2000	5067	2000	5000	0	5000
Ending Stocks	2000	5000	1000	2000	0	1000
TOTAL DISTRIBUTION	35000	53000	34000	50000	0	47000

Export Trade Matrix, Morocco			
Commodity: Squid/Cuttlefish			
Time period: CY 2000		Units:Metric Tons	
Exports for:	1999		2000
U.S.	14	U.S.	10
Others		Others	
Spain	15302	Spain	25009
Japan	5617	Japan	9561
Italy	2323	Italy	4605
Egypt	1500	Egypt	2388
China	556	China	500
Thailand	503	Thailand	480
France	78	France	264
Greece	22	Greece	36
Netherlands		Netherlands	32
Portugal	0	Portugal	28
Total for Others	25902		42902
Others not Listed	37		21
Grand Total	25953		42933