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## Morocco

## Fishery Products

## Annual

## 2002

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### Report Highlights:

**The GOM policy to increase export prices for octopus helped improve revenues of cephalopod fishing companies in spite of the decrease in quantities exported. The GOM will likely continue its stringent policy to improve the management of its resources while keeping revenues from cephalopods high.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Rabat [MO1], MO

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## Production

Octopus catches continue to dominate Morocco's cephalopod catches (nearly 3/4 of the landings). Squids (calamari and cuttlefish) are affected by policies meant primarily to control catches of octopus, as well as by the octopus market since revenues from octopus are a major source of income fishing companies.

Cephalopod catches went down significantly in 2001 primarily as a result of the implementation of the May 2001 GOM policy to restrict overall octopus catches to 85,000 MT. Although, there are no restrictions applied specifically on squid catches, the restrictions on octopus catches increased its prices significantly and made fishing squids alone rather unattractive both to deep sea and coastal fishing boats. Total catches of squids and octopus are not likely to increase significantly in the future as the GOM has currently no plans to phase out its restrictions.

**Moroccan Cephalopod Catches**  
(Metric Tons, Live Weight)

Calendar Year	2000	2001
<b>Deep Sea Cephalopod Fishing</b>		
- Octopus	55,373	46,896
- Squids	13,730	8,504
- Cuttle Fish	31,309	14,474
<b>Coastal Cephalopod Fishing</b>		
- Octopus	45,233	32,380
- Squids	3,275	3,046
- Cuttle Fish	2,531	2,688
<b>Total Octopus</b>	<b>100,606</b>	<b>79,276</b>
<b>Squids &amp; Cuttlefish Total</b>	<b>50,845</b>	<b>28,712</b>
<b>Estim. Squid Production (PSD Figures) <sup>(a)</sup></b>	<b>52,000</b>	<b>35,000</b>

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

*(a) includes some catches from unregistered rowboats and from fish that does not reach the official GOM channels. In the PS&D, AgAtt has accordingly adjusted estimates upward for catches to avoid inconsistencies.*

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. Their catches include also some white fish mostly exported. These steel boats are relatively modern and equipped with freezing equipments. 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 6,000 registered small rowboats fishing along the Atlantic and Mediterranean coasts whose catches are frozen inland for export but also used in the local market. There is a great deal of speculation about the number of small rowboats that are not registered and that have been particularly recently encouraged by the high prices of octopus.

## Trade

Proceeds from octopus sales still account for a large part of revenue of cephalopod fishing companies and the increase in octopus export prices during 2001 boosted profit significantly in spite of the decline in squid prices. Export prices are believed to have increased because of the GOM May 2001 policy to set a minimum export price (see MO1019). Japan, Spain and Italy are still the major outlets for Morocco's cephalopods, including squids. Cephalopods are sorted and exported in frozen cardboard boxes. The freezing occurs either on board the high sea trawlers or in inland for fish caught by the small coastal sea boats and rowboats.

The table below provides data on Moroccan exports of cephalopods, including squids:

Calendar Year	2000		2001	
	MT	\$1,000	MT	\$1,000
Exch. Rates (dh/\$US):		10.5874		11.2558
<b>Octopus</b>				
- Japan	46,076	130,631	30,141	116,591
- Spain	16,895	49,459	22,543	92,496
- Italy	9,484	18,158	9,494	28,486
- Greece	2,432	6,332	2,626	9,510
- China	291	792	976	4,184
- Thailand	479	1,477	961	3,878
- Others	1,180	2,559	1,038	3,372
<b>Total Octopus</b>	<b>76,838</b>	<b>209,408</b>	<b>67,780</b>	<b>258,517</b>
<b>Squids (Calamari &amp; Cuttle fish)</b>				
- Spain	25,009	71,934	23,835	73,081
- Japan	9,561	33,648	4,718	12,981
- Italy	4,605	11,273	3,098	10,314
- Turkey	0	0	1,467	586
- France	264	702	219	571
- Thailand	480	1,052	200	414
- Others	3,016	3,062	363	996
<b>Total Squids</b>	<b>42,935</b>	<b>121,671</b>	<b>33,900</b>	<b>98,944</b>

Source: Official Moroccan Trade Data (Office des Changes)

## Policy

After several trials to renew the fishing agreement with Morocco that allowed EU boats (mostly Spanish) to fish in Moroccan waters, negotiations were abandoned in 2000, which resulted in Morocco becoming a major supplier of cephalopods especially octopus.

### Resource Management

Over the past decade, the GOM has been taking several measures to preserve and better manage its fish resources. These include banning any 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 octopus 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  |
| - Small 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 Price for Octopus:

a) The GOM set a minimum price of 25 dirhams per kilogram (\$2.20/Kg) at which the packers could buy local octopus from rowboat owners. This helped to increase significantly income of thousands of small fisherman.

b) A minimum export price is set by a committee made of representatives of various professional organizations. Currently companies 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. In 2001, total revenues from octopus sales increased significantly in spite of the drop in the total quantities exported.

### 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. Last year, the GOM extended the fall ban from 2 to 3 months to include November 2001 to presumably follow recommendations of the National Fishery Research Institute (INRH). Whether the November ban will be applied in 2002 will depend on the recommendations of the INRH but also likely on the prices of octopus in the export market.

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.

The increase in periods of fishing bans caused the revenue of the average fishermen who is typically paid by month to go down significantly. Meanwhile, revenues of the octopus fishing companies increased because of the higher export price which led fisherman labor organizations to call for strikes, especially in Tan Tan port where the largest packer in Morocco is located. As a result, 55 high sea trawlers based in Tan Tan were unable to sail for an additional one and half month before a compromise was found between the parties.

PSD Table						
Country	Morocco					
Commodity	Squid/Cuttlefish				(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	5000	5000	2000	3100	1000	3600
Total Production	45000	35000	45000	40000	0	40000
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	50000	40000	47000	43100	1000	43600
Intra-EC Exports	0	0	0	0	0	0
Other Exports	43000	33900	41000	36000	0	37000
TOTAL Exports	43000	33900	41000	36000	0	37000
Domestic Consumption	5000	3000	5000	3500	0	3500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	5000	3000	5000	3500	0	3500
Ending Stocks	2000	3100	1000	3600	0	3100
TOTAL DISTRIBUTION	50000	40000	47000	43100	0	43600

Export Trade Matrix			
Country	Morocco		
Commodity	Squid/Cuttlefish		
Time period	Cal. Year	Units:	Metric Tons
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Spain	25009	Spain	23835
Japan	9561	Japan	4718
Italy	4605	Italy	3098
Thailand	480	Turkey	1467
France	264	France	219
		Thailand	200
Total for Others	39919		33537
Others not Listed	3016		363
Grand Total	42935		33900

