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Morocco

Fishery Products

Annual

2003

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Report Highlights:

Morocco's cephalopod catches are expected to be down significantly in 2003 presumably because of the depleted fish resources. As a result, exports of cephalopods (including octopus) are expected to be down in 2003 and 2004.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rabat [MO1]
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Executive Summary

Morocco's cephalopod catches (squids and cuttlefish) are expected to be down significantly during 2003 in spite of similar fishing conditions. The drop in catches has been attributed to the low level of fish stocks in the ocean and is likely to result in lower revenues for the fishing companies this year in spite of the significant increase in fish export prices this year.

Production

Octopus continues to dominate Morocco's cephalopod catches (nearly ¾ of the landings) and GOM policies meant to control octopus catches do affect squids and cuttlefish catches indirectly.

High Sea Cephalopods Catch, MT			
Calendar Year	2000	2001	2002
Octopus	55,373	46,110	18,964
Calamari	13,731	7,335	2,035
Cuttlefish	31,309	26,199	11,020
Total	100,413	79,644	32,019
Coastal Sea Cephalopods Catch, MT			
Calendar Year	2000	2001	2002
Octopus	45,233	32,380	38,664
Calamari	1,954	2,112	2,755
Cuttlefish	3,852	2,688	2,462
Total	51,039	37,180	43,881
Total Calamari	15,685	9,447	4,790
Total Cuttlefish	35,161	28,887	13,482
Total Squids	50,846	38,334	18,272
Estim. Squid Production (PSD Figure) ^(a)	52,000	35,000	30,000

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

(a) Include 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 categories of fishing 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 equipment. Catches from these boats are sorted, frozen and pre-packed 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.

Consumption

Local consumption of squid remains limited because of inadequate distribution channels, the relatively high prices of squid, and also because, traditionally, they have not been part of the Moroccan diet. Consumption of cephalopods in Morocco comes from rowboat catches and part of the coastal catches. No promotional activities are carried out in the local market.

Trade

Spain, Japan, Italy, and more recently Thailand remain the major outlet for Moroccan squid. Cephalopods are sorted and exported in frozen cardboard boxes. The freezing occurs either on board the high sea trawlers or in inland facilities for fish caught by the small coastal boats and rowboats.

Returns from exports during 2003 and 2004 are likely to be low reflecting the 2003 smaller landings of cephalopods. Indeed, export data for the first six months of 2003 show already a drop by about a third in volume compared to 2002. The table below provides available data on Morocco's exports of cephalopods for the most recent years (Quantities in Metric Tons):

Calendar Year	2000	2001	2002
Squids (Calamari & Cuttlefish)	42,933	33,899	30,148
Spain	25,009	23,833	18,032
Japan	9,561	4,718	6,672
Italy	4,605	3,098	2,818
Thailand	480	200	2,265
France	264	219	138
China	500	53	123
Portugal	28	46	36
Greece	36	110	26
Others	2,452	1,632	39
Octopus Exports	76,838	67,780	71,527
Japan	46,076	30,141	40,748
Spain	16,895	22,543	16,008
Italy	9,484	9,494	9,385
Greece	2,432	2,626	3,136
China	291	976	970
Thailand	479	961	567
South Korea	197	562	461
Others	983	476	252

Source: Official Moroccan Trade Data (Office des Changes)

Policy

Resource Management

The government pursues its policy to preserve and better manage its fish resources. Several measures have been taken including banning any increase in the fishing capacity and strictly

controlling the installation and expansion of freezing packinghouses. The GOM continues to impose fishing bans during the September-October and March-April periods.

On May 2001, the GOM took several measures to limit octopus catches and to increase its prices during the 2001-2003 period:

1. The maximum allowable catch for octopus is 85,000 MT. It is allocated between fishing boats categories as follows:

- Large cephalopod trawlers / Freezers 44,000 MT
- Coastal Fishing Boats 6,000 MT
- Small rowboats 28,000 MT

The remaining 7,000 MT is allocated between the three groups depending on the prevailing market and catch situations. In 2003, the low level of catches resulted in quota not being fully used by any of the three categories.

2. The GOM had set prices at which the packers could buy octopus from rowboat owners, and set export prices (see MO2019). In May 2003, price fixing measures were abolished by the GOM.

The quota and price setting was specifically for octopus and was not intended for squid and cuttlefish. However, since octopus is a major source of revenue for the fishing companies the two measures are relevant.

PSD Table

Country Commodity	Morocco Squid/Cuttlefish (MT)						UOM
	2002 USDA Official [Estimate [Revised DA Official [2003 USDA Official [Estimate DA Official [2004 USDA Official [Forecast Estimate [New]	
Market Year Begin	01/2002		01/2003		01/2004	MM/YYYY	
Beginning Stocks	2000	3100	1000	452	0	452 (MT)	
Total Production	45000	30000	0	25000	0	30000 (MT)	
Intra-EC Imports	0	0	0	0	0	0 (MT)	
Other Imports	0	0	0	0	0	0 (MT)	
TOTAL Imports	0	0	0	0	0	0 (MT)	
TOTAL SUPPLY	47000	33100	1000	25452	0	30452 (MT)	
Intra-EC Exports	0	0	0	0	0	0 (MT)	
Other Exports	41000	30148	0	22500	0	27400 (MT)	
TOTAL Exports	41000	30148	0	22500	0	27400 (MT)	
Domestic Consumption	5000	2500	0	2500	0	2500 (MT)	
Other Use/Loss	0	0	0	0	0	0 (MT)	
TOTAL Utilization	5000	2500	0	2500	0	2500 (MT)	
Ending Stocks	1000	452	0	452	0	552 (MT)	
TOTAL DISTRIBUTION	47000	33100	0	25452	0	30452 (MT)	

Export Trade Matrix			
Country	Morocco		
Commod	Squid/Cuttlefish		
Time Period	CY	Units:	Metric Ton
Exports for:	2001		2002
U.S.	1	U.S.	0
Others		Others	
Spain	23833	Spain	18032
Japan	4718	Japan	6672
Italy	3098	Italy	2818
Thailand	200	Thailand	2265
France	219	France	138
Greece	110	China	123
China	53	Portugal	36
Portugal	46	Greece	26
Total for Others	32277		30110
Others not List	1621		38
Grand Total	33899		30148