

Kingdom of Morocco



Ministry of Agriculture
and Maritime Fisheries

"A legacy
of know-how,
An expertise
in perpetual renewal"



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MOROCCAN SEAFOOD
Naturally

Fisheries treasures recognized worldwide !

Morocco ranks high in the ranking of the largest producers and exporters of seafood. This world renown is due to a diversified fishery resource of high quality, as well as to an efficient infrastructure. One could add to these advantages a considerable fleet and cutting edge techniques of production. These meet the most demanding standards of quality and safety, reinforcing the reputation and expertise of the Moroccan fisheries sector.

A vital sector :

2.5%
of GDP

Source of employment :

170 000
direct jobs

490 000
indirect jobs

Great potential for export :

8.5%
of global exports

44%
of food exports

First exporter of sardine in the world :

Sardina pilchardus (walbaum, 1792). Known and recognized worldwide.

This pillar sector of the Moroccan economy is characterized by qualified human resources, operating in all segments of the fishing industry from catching to commercialization. Fishermen, wholesale fish merchants, processors, distributors and fishmongers enhanced over time their know-how to provide consumers with quality products meeting their expectations.

Reference year : 2014



An equipped and structured sector

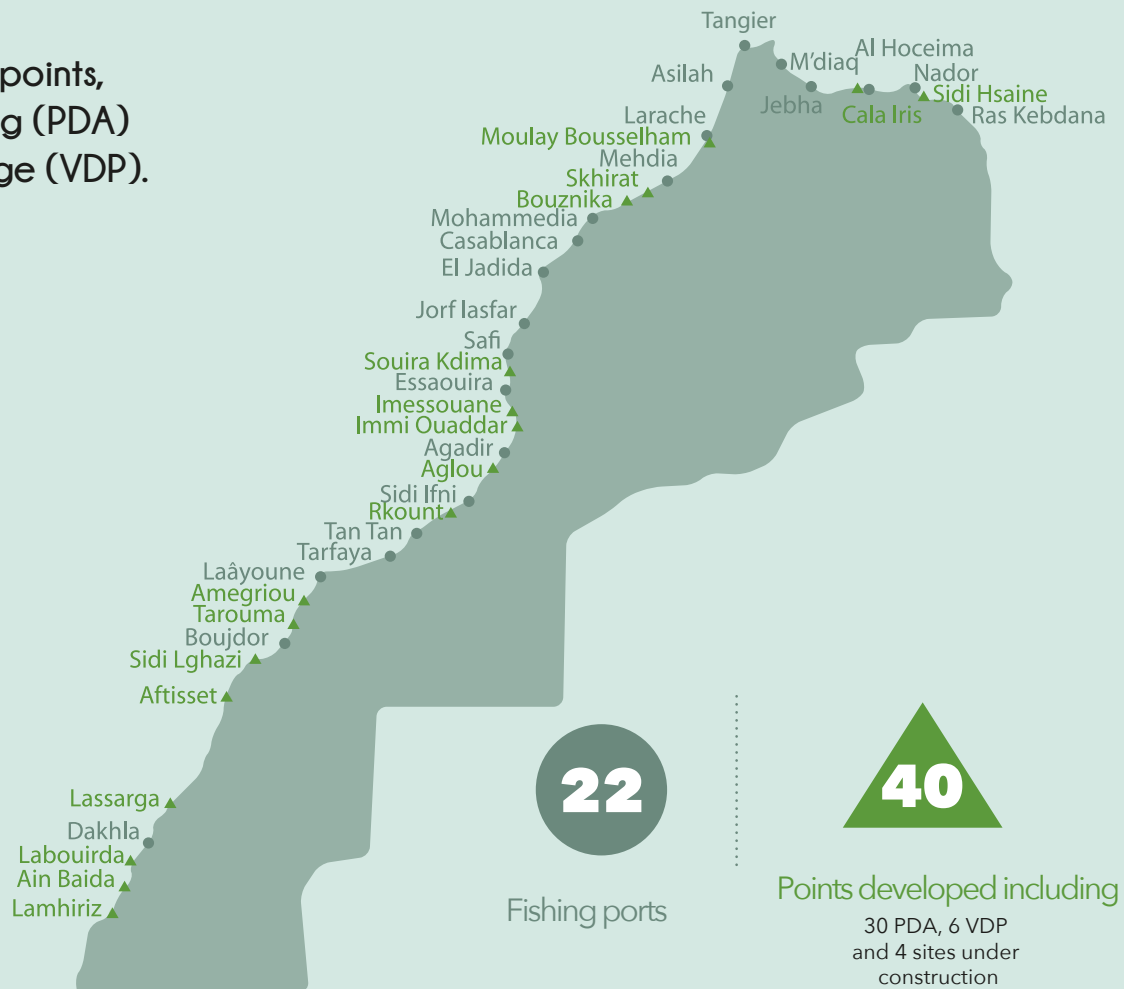
The geographical location of Morocco allows it to have a dual oceanic and Mediterranean coast. This environment is conducive to fish resources, sustainably exploited by a powerful fleet: artisanal, inshore and offshore, operating along the Moroccan coast. Such a crucial sector had to be equipped with modern infrastructure. Fishing fleets, modern ports, PDAs (Set Point Landing) and VDPs (Fishermen's Village), fish markets, processing factories, wholesale markets, all testify to the significant investment made in a sector in order to meet the highest standards.

Infrastructure, the development challenge

The marine fisheries sector remains a leading sector of the socio-economic development thanks to expanding port infrastructure and reception, as well as coastal development programs to promote and organize fishing activity.

Two types of structures, scattered throughout the country, receive the Moroccan landings of fishery products:

- Fishing ports,
- The developed points,
 - Set Point Landing (PDA)
 - Fishermen's Village (VDP).



Fishing Fleet... expertise to practical daily use

Distributed on all fisheries in the Mediterranean and the Atlantic and present in all fisheries, the Moroccan fishing fleet consists of artisanal boats, coastal vessels and offshore vessels.



The artisanal fleet

The artisanal fishing fleet is composed of small boats made of wood, measuring 5 to 6m long. Most of them use speedboat engines and carry less than 2 tons.

The total active artisanal fleet is around 15 600 units.



The coastal fleet

The coastal fleet includes units with a tonnage of less than 150 GRT and an Overall average length of 16 to 22m.

The active coastal fleet includes 1 750 units composed of :

Longliners, Trawlers, Seiners, Trawlers seiners, Longliners, Purse seiners, Trawlers longliners, Trappers, Seaweeder, Tuna trawlers, Coral divers, Lobster boats.



The offshore fleet

The offshore fleet consists of vessels longer than 24m and a tonnage of 150 GRT.

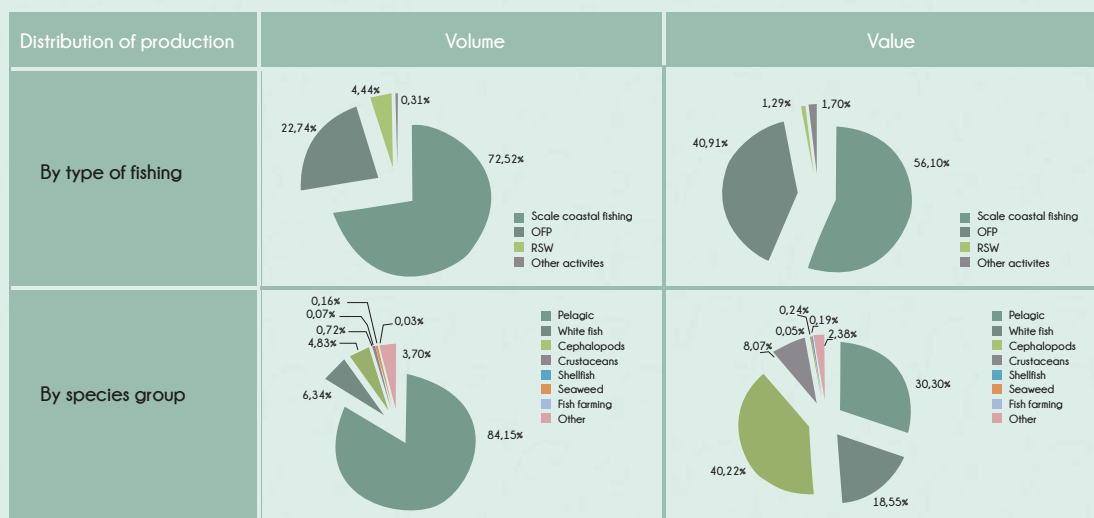
The active offshore fleet includes 303 units including :

Cephalopod boats, Shrimp trawlers freezer, Trawlers R.S.W, Pelagic boats, Refrigerated, Tuna boats, Tuna seiners R.S.W.

Reference year : 2014

Morocco, a world champion in production

Thanks to an efficient infrastructure, Morocco is now a production area and recovery of fishery products, which has no reason to envy any world champion in this field. Thus, the Moroccan fisheries production amounted to 1.7 million tons worth more than 10 billion Dh.



Moroccan Valuation: at the cutting edge

The valuation of seafood in Morocco dates back more than a century; it is a long history punctuated by milestones in Morocco's important evolution over the decades. The Moroccan industry valuation of seafood started in the 1920s, with the emergence of some manufacturing units for canned sardines. Over time, the recovery operation has diversified into several components, thereby developing a reputation nationally and internationally for a wide range of seafood products.

Throughout this evolution, the Moroccan professionals were able to build an industrial know-how combined with the availability of good quality seafood. This has helped to position Morocco as a chief producer and exporter of canned sardines.

In the beginning : an excellent raw material

All industrials are aware of the importance of high-quality raw material, which is a guarantee of the excellence of the elaborated finished products. Hence the importance given to the reception step done by a skilled workforce which is responsible for accepting or rejecting the lot. These experienced staffs are familiar with each species caught and its various states of degradation. Experienced, they can decide very quickly on the freshness of taking over the control of texture, colour, smell, or the eyes, gills, scales, ... etc.

This organoleptic control is combined with that of the temperature of transport conditions, traceability, packaging, and analyses carried out in laboratories equipped with advanced technology, in order to define the physical, chemical and microbiological quality of each batch of raw material.



Performance and technical expertise

Industrial valuation of seafood is ranked among the most successful food industries.

In Morocco this sector is ruled by strict regulations. The exercise of the seafood processing business requires obtaining a license from the Department of Marine Fisheries, on the advice of the National Food Safety Office. It is an approval which requires, among other things, compliance with a series of location requirements, construction, production tools, quality and nature of the equipment. In addition to these requirements there are technical specifications and production parameters, as well as requirements for the health product quality which require the establishment of a self-control plan according to HACCP (Hazard Analysis Critical Control Point).

All approved units are subject to control and monitoring by the central and regional commissions, to verify compliance with regulations, hygiene and manufacturing and quality seafood. To modernize their units, professionals are equipped with all the human and material resources needed to achieve compliance with regulations and ensure continuous optimal quality of the products produced. Anxious about standards and quality assurance standards, they have engaged themselves in other types of certification to better meet the expectations of their customers, such as QMP, ISO, BRC, FOS, IFS, ... etc.

Behind the success of our facilities of valuation and our seafood products there stand men and women who grew up with respect for the sea and its marine heritage. These seasoned professionals have all the know-how to control all the parameters that define the health quality, nutrition and taste of seafood.

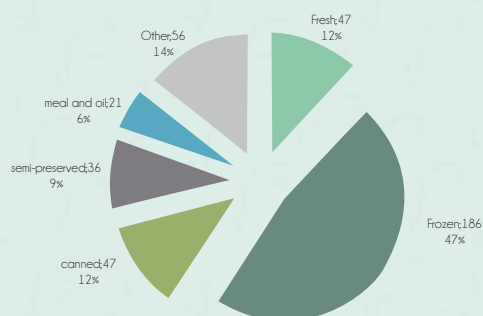
A diverse valuation

The fishery products valuation industry occupies an important place in the Moroccan economy.

The industrial fabric account :

303 sea freezing vessels

393 onshore processing units



Canned Fish

The activity of manufacturing canned seafood products consists of a packaging in hermetically sealed containers, coupled to a heat treatment sufficient to ensure commercial sterility. Fish canning is a secular activity in the Kingdom. According to some historians, the first sardine canning factories emerged during the First World War. This activity has developed greatly over the years, thanks to improved manufacturing technology, the richness of Moroccan waters in fish, including *Sardina pilchardus walbaum*, and to the innovation and diversification of products. Thus Moroccan fish canning managed to tap into multiple international markets and to place Morocco as a leading exporter of canned sardines.

The manufacture of canned fish concerning 47 units located primarily in Safi (20) and Agadir (12).

Production : **181 300 Tons**

Export turnover : **6.1 billion DH**

Reference year : 2014



Semi-preserved

The semi-preserving industry is based on several techniques including; salting, marinating in vinegar, with or without technical treatment which consists in inhibiting bacterial growth while maintaining the sensory and organoleptic characteristics of seafood.

The semi-preserved Moroccan anchovies, which is a fruit of the combination of a highly sought natural resource and a real local expertise, is a globally known product.

The semi-preserving industry has 36 units, including 17 based in Agadir.

Production : **17 600 Tons**

Export turnover : **1.3 billion DH**

Reference year : 2014

Packaging of Fresh products

The packaging activity of fishery fresh products processes a wide range of seafood products: white fish, pelagic fish, bivalve molluscs, crustaceans and cephalopods.

The fresh fish processing industry, which focuses on processing high value species sought after by consumers, buys daily from a variety of wholesalers. These products landed by small-scale coastal fishing fleet, are treated by a skilled workforce, with a proven expertise and real expertise in processing, handling, packaging, refrigerated transport and delivery to offer customers a varied product that meets the international standards.

Fresh seafood packaging benefits from the availability of organized distribution channels. These allow good control of the cold chain and better compliance with hygiene rules.

The packaging of fresh seafood products is performed by 47 authorized facilities located throughout the Moroccan coast, mainly in Casablanca (12) and Tangier (10).

Production : **21 100 Tons**

Export turnover : **1.8 billion DH**

Reference year : 2014



Freezing

Freezing the Moroccan seafood is the dominant activity in terms of number of units. It is practiced by ground units in freezer vessels. The ground freezing industry, initially oriented towards the valuation of cephalopods has expanded over the years to benthic fish, as well as small pelagic. The facilities inherent in this industry are new, equipped with modern technology and meet international standards of quality, hygiene and respect for the environment. The sea is frozen by a fleet freezer-shrimp and cephalopod.

Freezing seafood is practiced by 186 ground units, located primarily in Dakhla (71), Agadir (39), Laayoune (19), Casablanca (18).

Production : **218 300 Tons**

Export turnover : **6.6 billion DH.**

Reference year : 2014

Meal and oil

The fishmeal industry appeared in Morocco in the 50s in order to meet the waste disposal needs of the canning industry.

This also includes the fish that cannot be processed which is refused at the Grading Counters of the Industrial Fish and does not meet the criteria of freshness, quality and mould. This industry looks increasingly towards the production of a recovered oil for human consumption as well as a high protein meal for which demand is increasing.

Fishmeal and fish oil are intended to supply the local poultry market and international livestock and aquaculture market that are great seekers of animal protein.

The activity of the meal and fish oil is provided by 21 units. These units are mainly located in Laayoune (8) and Tan Tan (4).

Production : **227 600 Tons**

Export turnover : **2.7 billion DH**

Reference year : 2014

Shellfish processing and packaging

Professionals benefit from the quality of the Moroccan waters rich in nutrients and suitable for the development of shellfish to offer their customers the best products regarding the quality and taste. Shells Packaging in Morocco is governed by a series of regulations and strict standards in order to ensure their safety and quality.

Our professionals, all certified by the Department of Marine Fisheries, are very aware of the quality and safety of their products. They proceed to shellfish harvesting only in healthy shellfish production areas, using well adapted techniques that meet the standards in force.

The traceability of each lot is provided from the production area to the dispatch centre, through the purification or relaying stations.

Processing and packaging shellfish are currently performed by 14 approved facilities.

Reference year : 2014



Other activities

Besides the basic sectors, the sector of fisheries products valuation expands to other activities, including fish smoking, salting and drying, along with shrimp peeling and meals preparing.

Seaweed treatment

In Morocco, the exploitation of seaweed is a major socio-economic activity. It involves a sizeable population tied primarily to the collection of commercial seaweed (*Gelidium*). Industrial exploitation of marine seaweed in Morocco began in El Jadida in 1948. It is an export-oriented agar food. Morocco is currently ranked third global producer of agar.

Marketing: an efficient & competitive system

Morocco does not spare efforts to provide the sector of sea fishing with state-of-the-art equipment, itself combined with an exemplary organization. The aim of all this is to achieve optimal quality from landing to commercialization. Several major projects were completed in the Moroccan fisheries sector. They are part of a strategy of performance and enable the upgrading and modernization of marketing channels. These projects aim at ensuring optimum quality conditions in the processing of products, creating more transparency throughout the value chain, and ensuring the sale of mechanisms on the most promising markets, concern:

- The widespread use of standardized plastic containers,
- The establishment of new generation fish markets, modern wholesale markets and counters grading of industrial fish,
- Regulation and organization of fish trade.

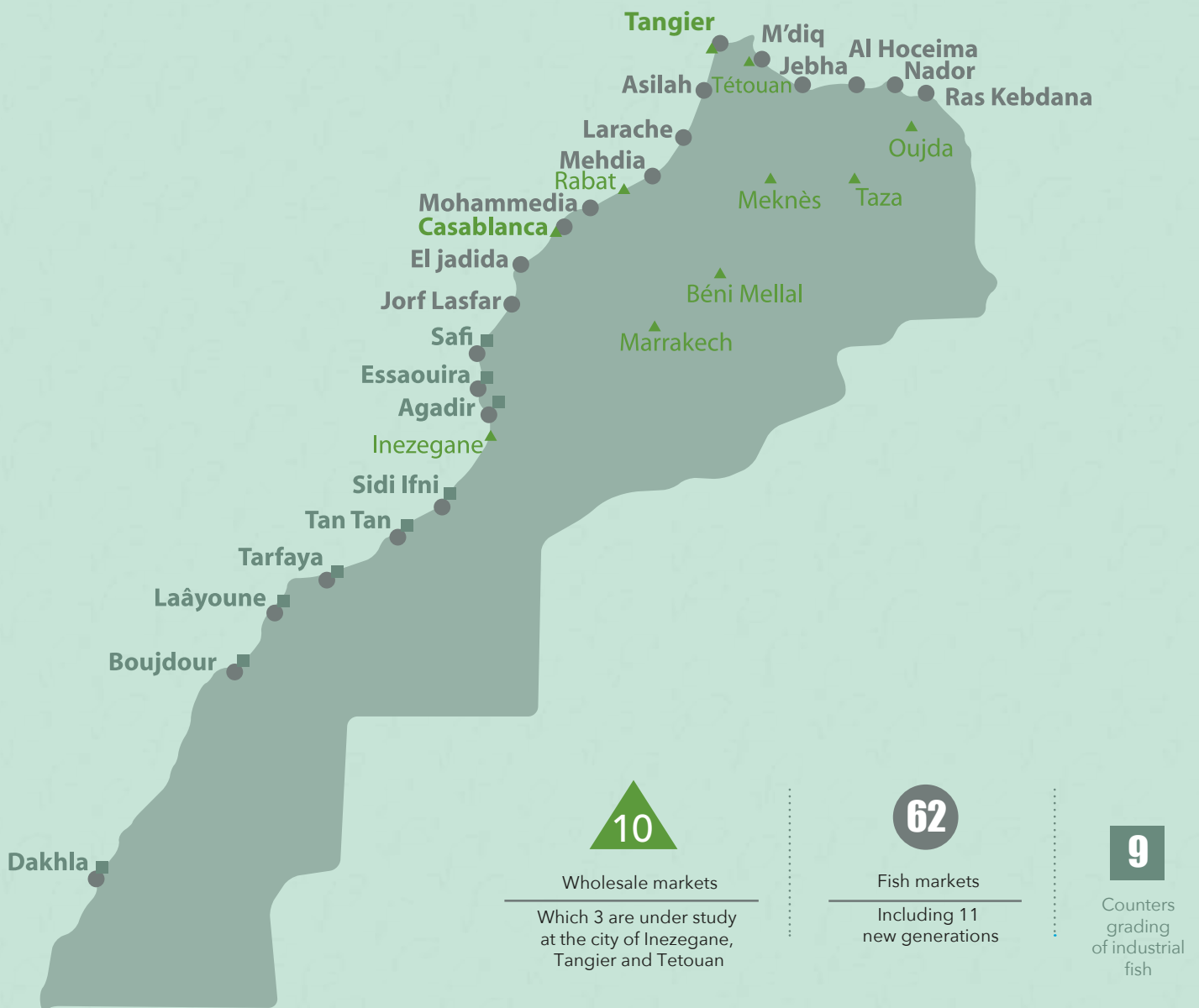


An exemplary commercial infrastructure

Morocco has an efficient, diverse and dynamic business infrastructure. It is spread over the whole country, ensuring a better optimization of marketing channels through an ideal connection between the production centres and consumption centres.

Three types of structures, present throughout the UK, provide better optimization of marketing channels:

- Fish markets
- Counters Grading of Industrial Fish
- Wholesale markets.



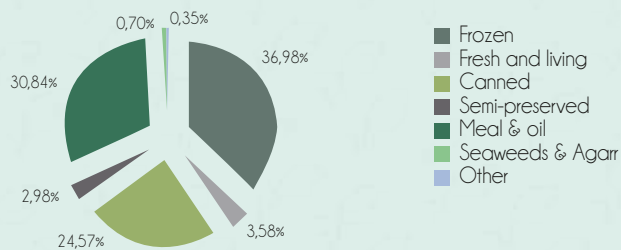


The Moroccan export sector, which operates in an international environment marked by intense competition and increasingly high technical and commercial requirements, has gained a worldwide reputation which ranks Morocco among the major exporters in seafood.

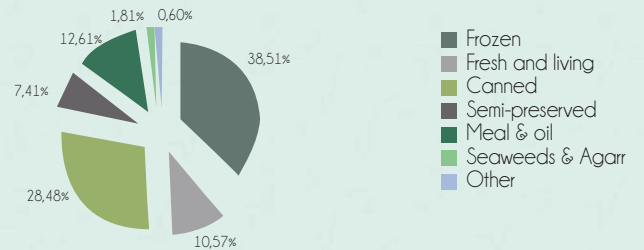
Morocco is one of the most active countries in the export of marine products. The volume of Moroccan exports in these products is about 590 300 tons worth 17 billion Dirhams.

Reference year : 2014

Distribution of the volume of Moroccan exports of seafood products by activity



Distribution of the value of Moroccan exportation of seafood by activity



The Morocco is now a must-regional platform for export of fishery products.

