

# The Sahrawi fisheries sector in the world economy: extraction, industry and commercialisation under occupation

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## ABSTRACT

The study of the Moroccan-occupied Western Sahara has traditionally been approached from the perspectives of legal or political conflict analysis, often overlooking the defining significance of the conflict's political economy. However, in recent decades, the fisheries sector has come to play a decisive role in the territories and can thus serve as an analytical vantage point from which to explore the detailed workings of occupation within the global capitalist economy. This article examines the development of the octopus and sardine industries in Western Sahara. It identifies the local, Moroccan and transnational actors that promote and have benefited from the globalisation of production in recent decades. The article highlights how the dispossession and exploitation of fisheries resources play a critical role in strengthening Morocco's settler colonial project and semi-peripheral position, while also serving global capitalist elites and their control of, and profit making via, global value chains. Far from being an exceptional practice, occupation provides a controlled space of accumulation for global and Moroccan elites, as well as a handful of Sahrawi actors, fitting smoothly into historical dynamics of imperialism.

## KEYWORDS

Western Sahara; fishing; occupation; settler colonialism; global value chains; imperialism

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## Introduction

Western Sahara has not traditionally been primarily associated with the sea and its natural resources. In the last two decades, however, fisheries have become one of the key economic sectors in the Moroccan-occupied territories, accounting for 72.4% of the volume of the total coastal and artisanal fishing for all of Morocco.<sup>1</sup> While the related infrastructure and the apparent economic and social development around the sector strengthen the occupation's entrenchment, they also constitute one of the legitimising tools for Morocco's occupation of Western Sahara.

To fully understand the exploitation of all of Western Sahara's fisheries resources requires specific analytical tools that do not necessarily apply to other cases in Africa. Besides sharing a model of overfishing with most of West Africa's other coasts,<sup>2</sup> Western Sahara is characterised by ongoing occupation and settler colonialism resulting from a period of European colonial occupation. The situation is perhaps more comparable to that of Timor-Leste or Papua New Guinea and has also recently been compared with Palestine and New Caledonia (Barreñada-Bajo 2021). Unlike traditional colonialism, with its structures functionally differentiated 'between the colony and the metropole', settler colonialism erases, or attempts to erase, that distinction (Veracini 2011, 3). This raises several questions: what does the Moroccan colonial occupation mean for the exploitation of resources and their integration into the global value chains (GVCs) of the fisheries sector? How are the actors in this sector configured around the interests of global capitalism, and how are global and local elites situated in the framework of the Moroccan political-economic project of occupation?

Western Sahara highlights the intertwining of colonial and neocolonial dispossession and exploitation with global capitalism. While colonial Spain focused on exploiting phosphate resources and maintained certain economic privileges after 1975 (Vilar 2005), other global powers have diversified their economic interventions in the region, from industrial agricultural projects to renewable energy. In this case, the exploitation of natural resources is an integral part of the Moroccan project. Research on the subject has undergone a significant evolution in recent years (Allan and Ojeda-García 2022), with the question of fisheries approached from an analysis of the legal aspects of fisheries or commercial agreements (Prickartz 2019; Allen 2020; Suárez-Collado and Contini 2021) and the controversies that may arise. These may relate to the need to have the express consent of the people of the territory in order to exploit its natural resources. This would comply with the doctrine of former United Nations legal counsel Hans Corell (Torrejón Rodríguez 2023). Yet, in quantitative terms, these agreements represent only a small percentage of the total Sahrawi fisheries catch. The most recent Morocco–European Union (EU) fishery agreement, which expired in July 2023 and cannot be renewed following a European Court of Justice decision (European Court of Justice 2024), applied to only 6% of the 2021 catch, including the Moroccan fishing grounds, somewhat less than the agreement with Russia. In contrast, in 2022 alone (Royaume du Maroc 2022), the catch unloaded in Dakhla and Laayoune (the two largest Sahrawi coastal cities) represented 71.58% of the total of the five largest ports under Moroccan control, including occupied Western Sahara.<sup>3</sup> The value of the offshore fishing catch unloaded at

Dakhla that same year represented 24.8% of the entirety of Morocco's offshore fishing, with Agadir, the Moroccan city where the most Sahrawi octopus is unloaded, accounting for 54%.

Given these data, this study hypothesises that both the bilateral agreements – which violate the duty of non-recognition (Allen and Trinidad 2024) – and the exploitation and fisheries development actions planned by Morocco constitute powerful tools to legitimise the occupation. This helps to explain how they seamlessly form part of the dynamics of global capitalism. By examining the historical development of the fisheries sector in Western Sahara and tracing the movements of the various transnational elites and actors, the study reveals how direct extraction under the protection of agreements has ceased to be the main activity conducted by European companies, which now primarily operate in the commercialisation phase of the value chain.

To examine the role of the different actors in the fishing sector from the perspective of political economy, the article first outlines the operations analysed and methodological tools deployed. It then looks at the stages in the development of fishing in the Sahrawi fishing grounds, highlighting the decisions made by the Moroccan authorities that have set the tone for the evolution of the sector and how these have influenced GVCs. The final section presents the study's findings and their implications for analysing the Moroccan colonial project and its insertion into global capitalism.

## The global value chains of plundered fish in Western Sahara

Western Sahara may well seem like a unique case, due to its historical and contemporary characteristics. Research within the framework of conflict studies and the increased involvement of economic actors in the area requires a political economy analysis. The globalisation of production processes in the last decades has produced structural changes in semi-peripheral territories such as Morocco, blurring the North–South divide and creating a more nuanced picture beyond the core–periphery (Amin 1989; Ghosh 2021). Some authors argue that this model of globalised production has expanded through 'the proliferation of land *enclosures* dominated by export processing zones, tourist resorts, financial centres and extractive mining zones' (Cairó-i-Céspedes and Palacios Cívico 2022, 1951, emphasis in original) where the surplus value is maximised. These special areas or zones act as catalysers of the model. Incentives for investment and often stricter control of workers become spaces of accumulation for capitalist elites. The territories of Western Sahara under military occupation can be added to the list of places of enhanced accumulation, as a massive land enclosure for the controlled development of a clientelist regime. The Moroccan state plays an important role in ensuring the climate that economic actors need (Harvey 2019), while the actors' businesses solidify Morocco's project on the territory. Tax exemptions and other incentives for investment are applied (Ennagach and Radi 2022), and an inflow of migrant workers from southern Morocco ensures weaker community ties and encourages attempts at creating a more docile workforce.

Analysing the development of occupation using the concept of GVCs provides a precise tool that includes a macro-analysis of world-systems theory and a meso- and

micro-analysis of the fisheries sector and its firms. GVCs situate the fisheries sector within a broader dynamic of Morocco's occupation of Western Sahara and how occupation advances Morocco's global position at the expense of Sahrawis. Retracing the sector's GVC helps identify the actors involved in every stage of the production, from extraction to end-consumer commercialisation. According to Natasha Hamilton-Hart and Christina Stringer, the concept of GVCs helps when 'distinguishing the "vertical" relationships linking actors directly involved in a value chain [from one stage to the next] from the "horizontal" relationships that participants in a value chain have with outside actors', be it with political actors or other capitalist groups in other sectors (Hamilton-Hart and Stringer 2016, 2). Contrary to the neoliberal idea of a distinction between the market, the economy and politics, a critical approach to GVCs in both dimensions, vertical and horizontal, provides an understanding of the political and institutional contexts in which global capitalism thrives.

The study of the political economy of occupation shows how no case can be isolated from the global structures of accumulation, helping to avoid methodological nationalism. In other words, 'GVCs bring a level of interconnectedness that is structurally deeper than a straightforward exchange of goods' (Nathan et al. 2022, 28). However, GVC-focused research has been criticised for obscuring class relations (Selwyn 2016). Indeed, 'the concepts of core and periphery, or North and South, are increasingly not geographic per se so much as relating to social class' (Cairó-i-Céspedes and Palacios Cívico 2022, 1951). In our research, fieldwork was fundamental in the assessment of the class and labour exploitation dimension of the fisheries sector in Western Sahara. Yet, GVCs remain a limited tool for class relations analysis and more suited to an overview of value-extraction structures and flows.

In this study, the GVC approach helps to identify and describe the paths followed in the fisheries sector, and business and political actors and their bargaining strategies, and to assess how certain actors or geographies have historically 'upgraded', as it is commonly termed in the GVC literature, their positions along the different stages of the chain. We take a critical approach to GVCs, especially in the context of occupation, as the political configurations of fisheries policies become apparent. We use the GVC concept as a conceptual and analytical tool to identify the transition from direct European colonial extraction to GVC integration in Western Sahara, as a reconfiguration of centre–semi-periphery–periphery relations.

A detailed study of the fisheries sector was undertaken, using the GVC model of stages, desk research and, especially, research in the territory over the years. Two research residencies, one in Agadir in July 2022 and a second in Dakhla and Laayoune in January 2023, provided valuable information from interviews with key actors in the sector and accompanied observational work in industrial and port zones. Researchers are not usually allowed to carry out fieldwork in the occupied territories (Veguilla, Parejo and Feliu 2024), and when they do they are systematically persecuted by the Moroccan secret police, which presents significant challenges. Other primary sources included information from official Moroccan institutions (particularly the Department of Maritime Fisheries), the companies themselves, business websites, the Food and Agriculture Organization of the United Nations and the EU, among others. Secondary sources included media reports and relevant academic studies.

## Valuable fishing grounds

The waters adjacent to Western Sahara contain one of the richest fishing grounds in the world. While the species are varied, two families predominate, defined by their habitat: demersal and pelagic fish. Within these families, the octopus (demersal cephalopod) and the sardine (pelagic) are the most fished species, and they have come to form the basis for two fisheries with the associated necessary industrial operations for the species and their destination markets. Octopus quality depends on quick freezing and its markets are primarily in Europe and Asia, while the sardine, whose value as a fresh or frozen product is relatively low, is canned and processed into flour or fish oil and is primarily shipped to Europe and Africa. Major global value chains have developed alongside each of these fisheries, with a growing presence of large business groups around the two species and the different stages of the chain.

The octopus fishing ground is located off the southern coasts of Western Sahara, from Boujdour to Lagouira. Almost all the production data published by the Moroccan government concern Sahrawi octopus. Morocco has promoted the development of this fishery in three sectors, categorised according to the production methods used: boats or fishing gear. The offshore sector (O1) fishes for octopus using 38-metre trawlers with onboard freezing, meaning they can stay at sea for several months. The coastal sector (O2) uses smaller trawlers that lack freezing equipment, making them highly dependent on onshore industry. The same is true of the artisanal sector (O3), which uses small motorboats that go out and return each day to drop off or pick up small traps.

Sardine fishing in Western Sahara is known as Stock C, the sardine that is fished in Area C, or the southern area between Laayoune and Lagouira. Since the sector was restructured in 2010, Moroccan exploitation of this species has used industrial refrigerated seawater (RSW) vessels (S1). Before that time, however, there was a major coastal sardine fleet (S2), largely operating out of the ports of Agadir, Tan Tan and Laayoune and mainly comprising seiners without onboard refrigeration.

Proximity, or lack thereof, to the fishing ground of the octopus – the most profitable species – has influenced the configuration of the GVCs of the Sahrawi fisheries resources. Its proximity to Dakhla, for instance, favoured the local development of an artisanal fishing sector that specialised in this species (O3). In Laayoune, on the other hand, this fishery has been limited to the work of coastal trawlers (O2), and in the 1990s the city began to specialise in sardines and their processing. Agadir, the capital of the Moroccan Souss region, has become the epicentre of the octopus offshore sector (O1) and is the port of reference for 85% of the cephalopod freezer fleet.<sup>4</sup> Moreover, it is home to a major industry around cephalopod freezing and storage and pelagic transformation.

This is the background to the complex plundering of fishing grounds that are protected by international law (Haugen 2007; Naïli 2019), conducted via diverse global production chains. Each of the stages in these chains involves a variety of actors, elites from the semi-periphery or core countries, whose participation is also diverse in terms of value and benefits. To study them, this article follows the simplified stages of fishing extraction, industrial processing and commercialisation (which includes other steps, from logistical handling to consumer engagement). The first two stages

help us analyse the roles of Moroccan and Sahrawi actors in the chain, whereas in the commercialisation stage the main players are international actors. We focus on the first two phases, extraction and processing,<sup>5</sup> where it is possible to analyse the Sahrawi and Moroccan actors in greater detail, considering the constraints of field-work in an economy under occupation.

The aim is to shed light on the emergence and development of operations that begin with the extraction of Sahrawi fisheries resources and end in supermarkets around the world. This includes studying how the internationalisation of these operations reinforces the political occupation project, focusing on actors in each of the phases and their plundering in terms of value; and the decisions and decision-making capacity of actors that result from the power relations in the sector, produced by highly political/military and economic configurations.

## From colonial extractivism to ‘upgrading’ occupation: the colonial settler project in global capitalism

### Early colonial plunder

During the early years of the Moroccan occupation of Western Sahara, fisheries sectors in the Sahrawi coastal cities were practically non-existent. The Spanish colonial economy had been largely based on the export of resources extracted directly from the sea to the metropolis, using an offshore fleet that grew over time and was enlarged further by a foreign fleet, especially from the 1960s onwards (Morillas 1988).

Moroccan occupation of the sea followed the same model during the early years. The sea was established as a strategic sector in 1981 (following the annexation of the southern region of Western Sahara, Rio de Oro, in August 1979). Morocco prioritised the strategic development of the capital-intensive offshore sector, which would contribute to the accumulation of a surplus of key actors from the regime through the distribution of exploitation licences and financial and fiscal instruments to acquire large vessels, often without repaying the loans (*L’Économiste* 1992). The powerful families that benefited from this arrangement included the royal family itself, through the creation of Marona, the fisheries sector of the Omnium Nord-Africain (ONA) holding company,<sup>6</sup> as well as senior military officials. Beginning in the 1970s, the fisheries sector became a key sector for the distribution of resources to the senior military officials who were at the time participating in the Western Sahara War (1975–91). These included Abdelaziz Bennani, Hosni Benslimane and Abdelhak Kadiri, significant figures in the Moroccan security regime (CFB et al. 2019). After factions in the military led two attempts to dethrone the king in 1971 and 1972, ‘recovering’ Western Sahara came to form part of a strategy to re-legitimise the monarchy and redefine relationships between the two main powers, the military and the monarchy. This ensured the promotion of the intensive fishing of a high-value species on the international market, the octopus, only found in the waters off Western Sahara. **Table 1** outlines how the offshore sector of this species (O1) has become specialised.

As the data show, this sector grew rapidly during the first two decades of Moroccan occupation. The proximity of Moroccan shipowners to the regime’s power



**Table 1.** Evolution of offshore boats.

Year	Total freezer boats	No. of cephalopod freezer boats	Percentage of octopus boats
1976	0	0	0
1996	331	273	82.5
2016	320	237	74
2021	321	253	79

Source: Authors' elaboration, using official data provided by Moroccan maritime fishing associations.

circles explains this sector's significant capacity to exert pressure. During negotiations with the European Commission in 1994 and 1995, the Professional Association of Moroccan Offshore Fishing Shipowners (APAPHAM), affiliated with the General Confederation of Moroccan Enterprises (CGEM), participated for the first time in defining Morocco's negotiating position, opposing any fisheries agreement that included octopus. Although the agreement signed in 1995 did include octopus, the collective action of the shipowners ensured that this was the last agreement that included octopus as an authorised catch for European operators (Veguilla 2011).

It was only in the 2000s that some Sahrawi businessmen began to take an interest in this sector. This coincided with the publication of the 2002 Corell Report and the legal conditions for the exploitation of natural resources in a non-self-determined territory (see Corell 2002; Veguilla and Gómez Martín (2025), in this issue), which suggests that this could have been a strategy favoured by the regime to legitimise the plunder. Since the octopus fishing offshore sector was exclusively of Moroccan and foreign capital, introducing Sahrawi shipowners helped to make the argument that the sector benefited the Sahrawi population. Additionally, for the first time since Moroccan occupation began, in the 2010s semi-public Chinese companies starting to invest in the first stage (extraction/freezing) (Figure 1).

### The large fisheries groups

The business groups that operate in the sector contain several key actors who illustrate its evolution and constitutive relations and interactions.<sup>7</sup> Along with the former Marona, Omnium Marocain de Pêche (OMP), the royal family's fishing subsidiary, is a key company in Morocco's occupation of the sea. It was established in 1982 as a Moroccan company with mixed capital, headed by Moroccan engineer Mohamed Laraki, and received significant foreign direct investment, from sources that have changed with time. Laraki initially worked with businessman Hassan Ali Zarrouk, rumoured to have close ties to the Libyan Al-Senussi family, and the construction of the Tan Tan shipyard owned by the OMP was attributed to that family's capital. In

**Figure 1.** Value chain of the octopus fishing offshore sector (O1).

Source: Authors' elaboration.

1989, Cheikh Abdallah Saleh Kamel of the Saudi Dallah Al Baraka Holding Company bought the Libyan businessman's stock, in what was the group's first investment in Morocco (Veguilla 2011). In 2002, Laraki joined forces with Japanese company Nippon Suisan Kaisha through its Spanish subsidiary in the city of Vigo (Europacifico Alimentos del Mar) (El Faro de Vigo 2008). Mohamed Laraki has acquired an increasingly important role in the decision making around fisheries in Morocco. His early participation in occupying the sea and his position as owner of the largest company in the primary sector in a province with high unemployment, especially among young people, have given Laraki a trump card that he has played with successive Moroccan authorities. The OMP group currently controls the largest fleet of ships: both OMP Flotte (37 cephalopod freezer boats) and Phiasud (a subsidiary with eight cephalopod freezers). The OMP's trajectory cannot be analysed without acknowledging the incentives offered by the Moroccan regime in terms of foreign direct investment, which have positioned the group as a key intermediary between international capital and the fishing resources of Western Sahara.

The Joundy Group, owned by Taoufik Joundy, a businessman originally from Casablanca, is the second-largest group and has joined forces with Chinese investors. It has a stake in five companies that owned 28 cephalopod freezer boats in 2021: the Moroccan China fishery corporation, Haifen Fisheries (the largest, with 13 cephalopod freezer boats), Sopechemat, Filaka, Saly Fishing Corporation and Moroccan-China Fishery SA. In 2022, Joundy was elected vice-president general of the General Confederation of Moroccan Enterprises (CGEM) Federation of Maritime Fisheries. Jawad Hilali, a businessman from the Casablanca family of the current Moroccan prime minister (their wives are sisters), is deeply involved in the sector as the owner of three companies (Zima Ficheries, Drimane Pêche and Merseamar SARL) that together have 18 cephalopod freezer boats. For several years, Hilali held the presidency of the CGEM Federation of Maritime Fisheries.

The Zniber Group, owned by Casablanca businessman Abderrahim Zniber, is also active through Sofinas, which has 10 boats. It is currently a mixed company, with 50% associated with PROFAND, one of the largest Spanish fishing groups. Sofinas is responsible for all production (sending a daily fishing report and doing on-site packaging according to its partner's instructions), with PROFAND responsible for commercialisation.

Mohamed Zebdi, a businessman from Casablanca, is the current owner of the King Pelagique Group and represents the CGEM in Dakhla. He has had ties to the CGEM since he first began working in the sector, and at times was the only industrial businessman in Dakhla who was not associated with the Association of Marine Fisheries Industrialists of Oued Ed-Dahab (AIPMOD). He maintains links with Chinese capital through his Gold Sea Fish and Benni Pêche companies, each of which owns a cephalopod freezer boat. Previously, Zebdi managed General Bennani's offshore fishing interests, six cephalopod freezer boats.

In recent years Mokhtar Joumani, a Sahrawi businessman from Laayoune and familiar presence in the artisanal octopus and sardine fishing sectors, has burst onto the octopus offshore sector scene (O1). His support for the Moroccan monarch when Spanish troops left Western Sahara won Joumani extremely profitable businesses in the fuel and transport sectors. He has held the position of president



of the *Chambre des Pêches Maritimes de l'Atlantique Sud* for several terms, was re-elected in 2021, and is the only shipowner who has registered his boats in the ports of Dakhla and Laayoune, although he largely operates in Agadir. The Joumani family began to buy freezer boats in the 2000s and have gradually built a significant fleet (29 boats in 2020 and 21 in 2021, a difference explained by strategic management decisions around the fishing quotas assigned to each vessel within the same business group) through various companies, including *Société de Pêche du Sud de l'Atlas*, *Samak Sahara*, *Miramar Pêche*, *Artere Congel* and *Sakia Alhamra de Pêche*.

Two other businessmen who manage these types of vessels also come from Sahrawi tribes. The first is Ali Bouaïda of the *Holsatek* holding company, owned by the Bouaïda family from the Aït Lahsen tribe and originally from Gulemine. Ali Bouaïda was a founding member of the Moroccan political party *National Rally of Independents (RNI)*, with strong ties to the monarchy. He was one of RNI's main funders, thanks to the profits from *Petrom Sahara*, a former subsidiary of *Esso* until the 1974 Moroccanisation law, and which was later returned to the Bouaïda family in 1993 as part of the privatisation of the petroleum sector in Morocco. Ali Bouaïda has maintained ties with the RNI over the years, which allowed his daughter, Mbarka Bouaïda, to win her first term as a deputy in 2007, filling positions such as secretary of state in the Department of Maritime Fisheries under Aziz Akhannouch, Morocco's prime minister since 2021. She is currently president of the *Guelmim-Oued Noun* region. *Holsatek* has six cephalopod freezer boats through its company *Pescado Sur Oceano, SA*.

A second Sahrawi, Malainine Hibatou Al Abadila, originally from Laayoune but based in Casablanca, is the managing director of two companies, *Cisneros Sea Food* and *Smadep*, which own seven fishing vessels. They have ties with Chinese capital and, according to interviews, currently manage the interests of the deceased General Bennani. Finally, capital risk funds like *Alantra Private Equity* are also invested in this activity through the Spanish company *Unión Martín*. This business acquired *Palma Pesca* in 2014 and *Fine Fishing* in 2018, which owned four and three octopus boats, respectively, in 2021.

The analysis shows that the offshore sector developed due to privileged authorisations distributed by the regime to powerful Moroccan families, and due to a legal and financial framework that encouraged foreign investment through mixed companies. The data also highlight powerful Saharawi families, close to the regime's circles of influence, entering this sector coinciding with the publication of the 2002 Corell Report.

## The development of the fisheries sectors in Sahrawi coastal cities: reinforcing the occupation

Fishing operations in the Sahrawi coastal cities of Laayoune and Dakhla began their tentative development in the early 1990s. In Laayoune (where fieldwork was conducted in January 2023), the lack of an industrial cooling facility led to investments in fish flour factories, which do not require high-quality pelagic fish. This operation became very profitable for the first directors, including Sahrawis *Ahl Hoummad Haj Brahim*, *Tayeb El Moussaoui*, a CGEM representative in the House of Councillors (the

**Table 2.** Main companies involved in fish flour production in Laayoune.

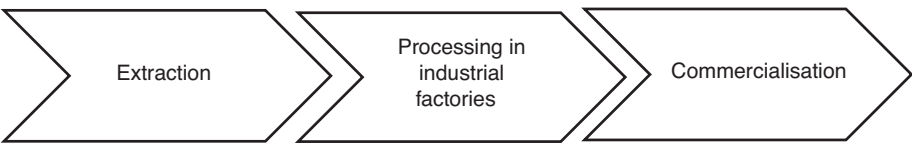
Directors	Company	Origin
Ahl Hoummad Haj Brahim	Sepomer	Saharawi
Tayeb El Moussaoui	Laayoune Elevage	
Mohamed Kantaoui	Sotragel	
Ali Razama	Laayoune Proteine	
Tariq Kabbage	KB Fish	Moroccan
Hassan Setissi	Copelit	

Source: Authors’ elaboration.

upper chamber of the Moroccan parliament) for several terms, Mohamed Kantaoui and Ali Razama; and Moroccans Tariq Kabbage, the former mayor of Agadir and associate of Aziz Akhannouch, and Hassan Sentissi (**Table 2**).

The industry associated with the human consumption of pelagic fish subsequently developed in the late 1990s and early 2000s (**Figure 2**). IgloFish, owned by Casablanca native Mohamed Tazi, was the first fish exporter, starting in 1996. During these early years, investments were also made by the Ould Errachid family (Rijal Sakia al Hamra Frigo), one of the most powerful in Sahara, which played a key role during the Moroccan occupation, along with the Joumani and Derhem families, all beneficiaries of concessions in the fossil fuels sector (Sopétrole, PNA and Atlas, respectively). A member of the R’guibat tribe, Handi Ould Errachid has served as mayor of Laayoune since 2009 and deputy for the Istiqlal Party since 2002 and member of its central bureau, in addition to coordinating the party across Western Sahara. His brother Khalihenna was also a key figure during the years of Spanish decolonisation and the Moroccan occupation and was appointed Minister of Saharan Affairs by King Hassan II between 1977 and 1995, and later president of the Royal Advisory Council for Saharan Affairs (Corcas) after its creation in 2006. In 2021, his son-in-law and nephew was elected president of the Laayoune-Sakia El Hamra Regional Council, and his son elected to the upper chamber of the Moroccan parliament on 12 October 2024, replacing his son-in-law Naâm Miyara.

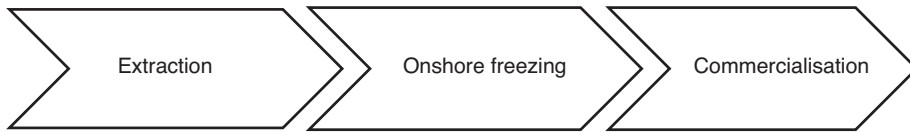
At the same time, industrialists (or other shipowners) were beginning to amass the significant fleet needed for provisioning purposes: 194 coastal seiners (S2), boats that deploy a net, according to data from the National Institute of Fisheries Research (INRH [n.d.a](#); [n.d.b](#)), 68% of all of the coastal boats registered in Sahrawi ports (286), or 57% when Tan Tan is included. According to the same data, the coastal extractive sector in Laayoune is the main producer of pelagic fish, even when all the Moroccan Atlantic and Mediterranean ports are included. It supplies – along with Dakhla and



**Figure 2.** Value chain of the sardine fisheries coastal sector (S2).

Source: Authors’ elaboration.

Tan Tan – the industrial units in Agadir to which the product is transported by land, which is less expensive than sea transport.



**Figure 3.** Value chain of the octopus fishing coastal sector (O2).

Source: Authors' elaboration.

Regarding coastal octopus fishing (O2), according to INRH data, 150 trawlers fish for octopus from the ports of Laayoune and Tan Tan (INRH [n.d.c](#)). The INRH regional director confirmed that in the December 2021 campaign, the coastal octopus sector quota was mainly taken by Laayoune (interview in Dakhla, 13 January 2023). The octopus tunnel freezers play a much smaller role than the pelagic fish-processing industries ([Figure 3](#)).

Octopus fishing largely developed in Dakhla, with its artisanal sector (O3). It dates to the early 1990s, in the wake of the 1991 ceasefire between Morocco and the Polisario Front, with the creation of tunnel freezer operators like CCID, owned by the Derhem family, and Dakmar, whose construction was financed by Banco Popular, a semi-public financial institution at the time. Its profitability created a domino effect or inspired imitation. Refrigeration units proliferated thanks to licences and financial loans granted to notables with little knowledge of the sector, and to Moroccan operators who came to invest in Dakhla. One example was Mohamed Zebdi, who was the first to manage a pelagic industry in the city (Gold Sea Fish I and II) before the 2000s.

There were only four officially approved industrial units in Dakhla in 1994, but by 2002 the number had risen to 90 (Veguilla [2009](#)). Moreover, there was a detectable economic/political overlap within an elite that would come to take up the role of promoters, backing Moroccan interests in the conflict (Veguilla, Parejo and Feliu [2024](#)). Examples in the Dakhla-Oued Eddahab region include parliamentarians elected in 2002 and re-elected in 2007 (Sliman Derhem, M. Boubakr, Amar Cheikh and Mohamed Lamine Hormatallah) who had tunnel freezers; three of the four deputies (Boubakr, Hassan Derhem and A. Akfas) in the 2011 elections; S. Youmani, the cousin of Moktar Youmani and mayor of Dakhla between 2003 and 2021, who managed the family business Artere Congel; and Khattat Yanja, elected regional president in 2016 and re-elected in 2021.

This rapid development sparked unrest among the Moroccan octopus shipowners close to the political authorities, who were responsible for enacting the first Moroccan fisheries management policy in 2004. During negotiations, AIPMOD opted for a strategy of differentiation, as opposed to affiliation with the CGEM, and a discourse that linked the local artisanal octopus fishing sector to Dakhla's economic development (O3), to the extent that the offshore sector unloaded its catches in the Moroccan port of Agadir (O1). In the early 2000s, this development-centric and autochthonous discourse was in keeping with the Moroccan strategy to legitimise the plunder of resources. This discourse also took hold in European institutions and was used to legitimise the fishing agreements signed with Morocco. The octopus

artisanal (O3) and coastal fishing sectors (O2, S2) attracted settlers from Morocco, enabling the settler colonial project and its narrative of 'economic development' for the territory to become a reality on the ground.

Nonetheless, the decisions adopted in 2004 fundamentally benefited the shipowners (O1). Interviews with the heads of the Department of Fisheries Resources of the National Institute of Marine Research in 2009 and 2023 revealed that shipowners were resistant to a reduction in the offshore octopus fleet (which did not occur) and that they benefited from a quota of 63% of the total allowable catch, as opposed to 26% for artisanal fishing (O3) and 11% for coastal fishing (O2). The interests of large Moroccan and foreign economic holdings were thus preserved.

### **Reorganising the sector in the 2020s: a new neoliberal paradigm for fishing exploitation?**

The decisions made by the Moroccan fisheries ministry in the new century, formalised in the Halieutis Plan,<sup>8</sup> have produced significant transformations in the fisheries sectors in Sahrawi coastal cities and, therefore, in the global value chains. Although the measures to reorganise the octopus fishery in 2004 included plans to convert octopus tunnel freezers into pelagic transformation units, the reorganisation of the sardine fishery was brought about by Halieutis. Converting small tunnel freezers was ultimately considered to be unviable, with many then sold or rented out. In the sardine fishery, large industrial units were favoured that were already specialised, either partially (the Derhem family's CCID and the Youmani family's Artere Congel) or totally (Mohamed Zebdi's Gold Sea Fish I and II). Moreover, this facilitated investment by large pelagic industrial groups from Agadir and Laayoune in Dakhla, through the authorisation of the construction of processing units and licences to acquire RSW boats to supply the emerging industry in Dakhla and traditional Moroccan canning, which received a quota of 20,000 tonnes from Stock C. The regime ensured the profitability of the investing companies through a distribution system for quotas and the possibility of transferring them to the RSW boats (interview in Dakhla, January 2023). The facilities also benefited from low wages in the industry (the net monthly guaranteed minimum wage was set at 2,970.05 dirhams in September 2023, equal in early 2025 to US\$295.78). The result was major surpluses from the extraction and processing of Sahrawi sardines.

The beneficiaries include the large capital holders in the fishing industry sector, most of whom are members of the Moroccan business elite. According to data from the Moroccan Confederation of Industrial Pelagic Fishing Shipowners (COMAIP) (COMAIP n.d.), 11 groups control 26 RSW licences, alongside companies that are not members of this organisation, like Khattat Yanja, the current president of the region, and the Yumani Group (with one licence each; interview in Dakhla, January 2023) (Table 3).

These were already important companies in the sector, owners of large Moroccan financial groups, regardless of having any ties with foreign capital. The Halieutis Plan has provided an opportunity for these groups to expand their operations and ensure the supply of Sahrawi fisheries resources for their industries, both preexisting and newly created. These groups are active in both the industrial handling phase and the extraction phase (S1), as seen in the example of King Pelagique (Figure 4).

**Table 3.** Group members of COMAIP.

Group	Company	Number of RSW vessels
Sentissi	Copelit (Laayoune)	6
Zebdi – King Pelagique	Benis Pélagique	5
Ouckacha	Alia Pêche	3
Muntandis	Les Grandes Marques Chérifiennes-LGMC	2
Atlantic Harvest	Indusmar, Sarma, Oceamic, KB Fish	2
Sanam Holding	Unimer	2
Belhassan	Cibel	2
Talem Africa	Silver Food (capital from the United Arab Emirates)	1
Union Pelagique	Sjovic Morocco (mixed company with Norwegian capital)	1
Ylara Holding	CUMAREX, Atuneros del Sur	1
Bicha	Aveiro	1

Source: Authors' elaboration, based on data from COMAIP (n.d.).

**Figure 4.** King Pelagique's five refrigerated seawater (RSW) vessels in the global value chain of the sardine fisheries offshore sector (S1).

Source: Authors' elaboration.

The interests of the shipowners and the industrialists have converged in the CGEM's two federations: the Maritime Fisheries Federation (FPM), which has traditionally represented the interests of the octopus fisheries shipowners (O1) and is currently led by Ali Ouckacha (Alia Pêche), the son of the founder of the APAPHAM; and the Federation of Fish Processing and Valorization Industries (FENIP), the traditional representative of the Moroccan pelagic industry. For example, Hassan Sentissi (one of the first Moroccans to invest in the fishing industry in Laayoune, through Copelit) is president of the FENIP and his son, Rida, represents the family's interests in the FPM as an industrial pelagic vessel owner (S1). In this way, the regime has contributed to the development of semi-peripheral elites in line with its interests as an occupying power in the territory, and in the case of the Sahrawi businessmen, as guarantors of social control in Western Sahara. This capital accumulation makes it possible for the Sahrawi elite to engage in politics and maintain clientelistic ties with their electorate, strengthening links with the population that help to maintain social control (Veguilla, Parejo and Feliu 2024). As analysed elsewhere in Africa (Daloz 2018), these ties play a role in the strategy of the central elites, in this case, the occupying elites, to maintain control of the territory, beyond the everyday resort to coercion.

In addition to the concentration of capital and diversification of operations in the chain, horizontally and vertically, another decisive dynamic in the sector concerns the interests of two major global powers, Russia and China (Table 4). Russian

**Table 4.** New and old foreign actors in the Western Sahara fisheries sector: main characteristics of their operations.

Countries	Characteristics of operations
Russia	– Uses industrial refrigerated seawater vessels (S1) – Undertakes direct extraction through bilateral agreements with Morocco
China	– Is involved in the offshore sector (O1) through joint ventures – Has different business ventures with Joundy, Hibatou and Zebdi
UAE and Norway	– Use industrial refrigerated seawater vessels (S1)
Japan	– Was formerly the major buyer in Dakhla but no longer buys from there and has shifted to become the major buyer in Nouadhibou (Mauritania)
Spain	– Lost the ability to deploy refrigerated seawater vessels (S1) with the end of EU agreements – Main buyers of octopus in Dakhla – Has some joint ventures (PROFAND, Union Martín)

Source: Authors’ elaboration.

operations date back to the 1960s during Spanish colonisation and have been renewed through agreements with Morocco since the occupation that authorise industrial sardine fishing using 120-metre boats (S1). Capital from Norway and the United Arab Emirates has also increased the Russian presence in the sector with the country’s acquisition of RSW vessels. China, in turn, has repositioned itself in the GVCs, with a growing presence in the extraction and freezing phases of the octopus fishing offshore sector (O1), with companies mainly associated with the Joundy Group, but also Sahrawi businessmen Melainine Hibatou and M. Zebdi. Both Joundy and Melainine have tunnel freezers in the Agadir port: Haifen Frigo and Cisneros Seafood. Other Chinese companies like Hai Sheng Fisheries are also active in the area, with three boats. Japan has ceased to be the top buyer of octopus in Dakhla, having shifted towards the cheaper Mauritanian market. Spain lost its presence in the production phase when the fisheries agreement between Morocco and the EU, of which Spain was the primary beneficiary, was not renewed. However, the country has positioned itself as the main purchaser of cephalopods in Dakhla, distributing the product to other European markets and regions of the world, as in the case of Moyseafood, operating out of Cadiz. Some Spanish companies that have traditionally been involved in the different phases of the chain, like PROFAND, or invested during the 2010s in the extraction phase of the offshore octopus chain, like Unión Martín, remain involved through joint ventures or acquisitions. The non-renewal of fishery agreements between the EU and Morocco has not ended the participation of European actors in the exploitation of Western Sahara fisheries. These actors and other foreign interests have relocated their businesses within the value chain, ensuring a surplus value on the global market of Sahrawi fish.

## Corporate surplus and the benefit to the Sahrawi population

The dynamics described above clearly show that the major beneficiaries of the plunder of Sahrawi fishing resources are the CEOs of large business groups (or their



shareholders if they are public companies). This is because they are able to control several stages in a single global value chain (for example, in S1 and S2 or O1), or even to expand their operations to both fisheries. Transport and commercialisation in international markets, in turn, generate large surpluses that become greater as the presence of the transnational company grows in the different phases of the chains. One example of this phenomenon is Grupo Unión Martín (O1), which became involved in all the stages of the chain after it acquired Palma Pesca and Fine Fishing in the 2010s (Grupo Unión Martín [n.d.](#)).

In terms of costs and benefits in the octopus fishing offshore sector (O1), each vessel begins its trip catching around US\$20,000 worth of fish, an amount that decreases as the days pass until the fish caught are worth around US\$7,000, at which point the ship returns to port because it has ceased to be profitable. Each boat consumes an average of 150 tonnes of fuel during the two months that it is usually at sea. The distance between the fishing ground and Agadir takes around two days to cover, and the total expenses per day come to some US\$9,000 or US\$10,000. The price of the product, which is used to calculate the profitability of the boat, is established beforehand (the buyer finances the boat operation at a preset price) or during the trip (the captain provides information about the species and size every day).<sup>9</sup> When the ship returns to port, fish are either unloaded into trucks for export or left in a storage tunnel owned or rented by the company. As ground transport is cheaper than by sea, octopus is usually driven to Tangier or Algeciras in trucks, from where it is transported by boat if the final destination is Asia (in the case of companies financed by Chinese capital or Japanese buyers) or continues on by truck if the purchasing or distributing company is located in Algeciras or another Spanish city. The ground transport companies can be Moroccan or Spanish, while the international trading companies that transport by sea and operate out of Moroccan ports, whether Agadir or Tangier, are Maersk (Denmark) and CMA-CGM (France).

The first stage of the process also includes payments to the ship's crew,<sup>10</sup> generally Moroccans, whose earnings vary according to their professional role ([Table 5](#)).

In general, captains have the highest income, based on their knowledge of the location of fishing grounds, as each boat's production depends on them. Captains have traditionally come from countries with a significant fishing tradition (such as Spain, China and Scandinavian countries). In the last 10 years, however, Moroccan professionals have been gradually incorporated.

In the case of the octopus artisanal sector (O3), the demand for resources produced by the onshore freezing industry has also been met by Moroccan fishermen. They were encouraged by the *laissez-faire* attitude of the Moroccan authorities when they facilitated the use of licences in Dakhla that had been granted for fishing in other regions. These professionals, as well as the Sahrawis who obtained licences, employed the settlers who arrived in the late 1980s and early 1990s, thus reinforcing the occupation (Veguilla [2009](#), [2022](#)), a trend that has also been observed in Laayoune (S2 and O2) (Tanabe [2016](#)). In addition to the lack of appreciation for fishing in the Sahrawi mindset (Veguilla [2011](#)), low salaries, living conditions on the coast during the fishing season and the exclusive presence of Moroccans in this operation have all made it a niche profession for settlers. For fishermen who do not own their

**Table 5.** Approximate crew earnings in the offshore sector (O1).

Professional categories	Wages and bonuses in Moroccan dirhams and US dollars
Captain	7% – 200,000 (US\$19,918) per fishing trip*
Head mechanic	30,000 (US\$2,988) per month (does not include bonuses according to catch)
Second captain	20,000 (US\$1,992) per month
Second head mechanic	20,000 (US\$1,992) per month
Sailors	7,000/8,000 (includes bonuses according to catch) (US\$697/797) per month

Source: Authors’ calculations, using fieldwork data.

Notes: \* Fishing trip is the term used to refer to the period of activity of a fishing vessel from departure to return to port. For the offshore sector (O1), this is about two months.

boats, their base salary is supplemented by a percentage of the catch. Finally, the activity requires workers to operate the onshore industries (handlers or cleaners, a very feminised profession), the most precarious jobs in the chain, filled largely by the sub-Saharan immigrant or settler population.

In this respect, discussion of the benefits for the Sahrawi population must be conducted with extreme caution, even more so bearing in mind ‘the great excluded’: the Sahrawi men and women who live in refugee camps in Tindouf or in the diaspora, as well as Saharawi activists living in the cities of the territories occupied, who are subject to economic discrimination by the Moroccan authorities (see Veguilla and Gómez Martín 2025).

## The Moroccan colonial project and Sahrawi fisheries

This article has helped to provide an analysis of the relationship between the Moroccan colonial project to plunder Sahrawi fisheries resources and the dynamics of global capitalism. It has studied the different development phases of the two most important fisheries, octopus and sardine fishing, in their primary value chains. In the first phase of colonial extractivism, both Spanish and Moroccan, the fisheries resources were plundered without any direct economic benefit for Western Sahara. Moroccan extractivism formed part of the (re-)legitimation strategies of the monarchy and the legitimation of the occupation project through the clientelist distribution of resources to both the Moroccan elite and to foreign companies connected to plunder through bilateral agreements.

Moving into the early 1990s, Morocco promoted the development of fisheries sectors in Sahrawi coastal cities and, with that, the transformation of the colonial model into a settlement model, from which it would extract a good portion of the precarious labour. This required not only investment in infrastructure but also the development of industrial operations associated with the commercialisation of each species. The model was closely tied to the imperialist narrative of ‘economic development’ and ‘modernisation’ that served specific actors, including European institutions, as an argument to justify the economic benefit for the Western Saharan population and, therefore, the alleged legitimacy of dispossession and the over-exploitation of their resources.

Finally, the 2010s witnessed a phase in which capital became concentrated in large business groups. Moroccan actors with ties to the regime and its exploitation model were positioned as the key players in the extraction and improved their position in other stages of the global value chain, such as processing and packaging. This occurred not only with Moroccan institutional and state support, but also thanks to business agreements with foreign actors (Spanish, Chinese, Japanese, and so on), confirming the hegemony of global financial interests over legal and political considerations. For their part, the presence of Sahrawi businessman was aimed at legitimising the Moroccan occupation project and contributed, along with the coercion of the regime itself in Western Sahara, to social control in the territory.

From a global perspective, the sector has favoured the emergence of mostly Moroccan semi-peripheral elites with support from the Moroccan state as legislator, police and financial guarantor. Morocco has fostered, on the one hand, accumulation by Moroccan businesses (as seen in the exclusion of the most highly valued species, octopus, from the agreements with the EU) and, on the other, a neoliberal model that concentrates capital in large Moroccan business groups, with or without foreign capital.

Overall, this has reinforced Morocco's semi-peripheral role by guaranteeing control over the sector, at the same time as the plunder has been inserted into global capitalism. The country's companies act as intermediaries between the commodity and the global centres of consumption, while taking advantage of an occupation structure that both marginalises the local populations and attracts settlers to further entrench the occupation project. In this respect, the nationalist goals of the regime are reinforced by Western Sahara's unfolding potential as a land to exploit, a massive land enclosure from which to extract benefits.

Within these logics of control, capitalist accumulation and the legitimisation of the occupation, foreign partnerships are essential, and the Moroccan project has ensured and incentivised this support. The case of OMP is instructive, since its evolution and development has depended on foreign investments facilitated by the financial, legal and political framework of the Moroccan state. OMP provides an example of how semi-peripheral economies like Morocco manage foreign investments and natural resources within a frame of structural dependence. At the same time, local actors such as Mohamed Laraki capitalise on these dynamics to consolidate their power, acting as intermediaries between international capital and peripheral economies. This case also illustrates both the limitations and the opportunities encountered by the comprador bourgeoisie in the global capitalist system and how it replicates the extraction patterns that are typical of the colonial or neocolonial centre, which extracts wealth from the periphery to maintain competitiveness and profits in the global markets.

In the case of international actors, the fisheries agreements between the EU and Morocco clearly did not aim to expel European interests from the GVCs analysed or from the exploitation of Sahrawi resources. Rather, they renegotiated their role and gains in the chain, stepping away from extraction/production, which reverted to the semi-peripheral elites, primarily Moroccans and Sahrawis. For their part, other actors from rising peripheral economic powerhouses like China and Russia – but also regional players like the United Arab Emirates (S1) – have been willing to take on the role played to date by European shipowners. As observed by Samir Amin (1989), the legal

limits of the EU contrasted with other global actors indicate that multipolarity does not necessarily mean a decline in exploitation, imperialism and global hierarchies.

The close relationship between imperialism and global capitalism is clear in the case of the fisheries sector in Western Sahara. The model of exploitation and occupation by force is, thus, constitutive with global capitalism and its dynamics, outweighing international law. The fisheries show how insertion in global capitalism has reinforced the Moroccan occupation project. Benefits of capital accumulation in the fisheries sector highlight dividends and their division among global and local actors aligned with the political and economic settler colonial project. This takes place in the contemporary period at the same time that the most precarious cheap labour is exploited within the framework of the colonial settlement project and the blocking of West African migration routes in the north of Africa.

## Notes

1. The last official figures available from the Moroccan Ministry of Agriculture and Fishery are from 2022 (Royaume du Maroc [2022](#), 8–10). All the figures in this article come from this source, unless otherwise indicated.
2. Among the FAO's 16 major fishing areas, the Eastern Central Atlantic (Area 34), to which the waters of Western Sahara belong, has 51.3% of overfished stocks, particularly sardine and mackerel. This percentage has increased 'drastically' in recent years (FAO [2024](#)).
3. A United Nations map of Western Sahara is provided in the introduction to this Special Issue. See Camps-Febrer and Bengochea Tirado ([2025](#), 142).
4. Information obtained from interviews conducted in Agadir in July 2022 was compared to the official list of freezer boats in 2021. See ONSSA ([n.d.](#)).
5. We include within the processing stage both primary and secondary processing taking place in the occupied territories or in Morocco.
6. Marona ceased to exist in 2014, after ONA was absorbed by another holding company that also belongs to the royal family, the National Investment Company (SNI), in 2010.
7. Four operators from the sector in Agadir were interviewed, two multiple times, in July 2022.
8. The Halieutis Plan is an initiative of the Moroccan king for the fishery sector, launched in 2009, which sets guidelines to further develop the sector.
9. Based on fieldwork in July 2022 and January 2023, the wholesale price of octopus ranges from 120 to 140 dirhams/kilo (US\$12–14), according to size.
10. This simplified approach to GVCs does not include other activities like boat building, provisioning or repair.

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