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FISHING



The Spanish fishing industry has developed over time, establishing itself as one of the most important fishing fleets in the world. Fishing makes an important contribution to Spain's economy.

The European Union's Common Fisheries Policy (CFP) started in 1970 by financing the first structural measures of the European Agricultural Guidance and Guarantee Fund (EAGGF) and includes a series of measures designed to make the European fishing industry both prosperous and sustainable. In 2011, the European Commission presented its proposals to reform the CFP, including a new fund for maritime and fisheries policy for the period 2014-2020, namely the European Fisheries Fund (EFF).

The new CFP aims to return sustainability to fish stocks and thus provide a stable, safe and healthy food supply in the long term, while also allowing the fishing industry to continue, ensuring the economic viability of European fishing fleets and creating new opportunities for employment and growth in coastal regions. At the same time, the new CFP encourages the industry to manage marine resources more responsibly. All these aspects, which will be debated throughout 2012 in the European Parliament and the Council, are expected to come into force in 2013.

With the aim of attaining good environmental status of the marine environment, Spain has adopted the Marine



Environment Protection Act 41/2010. In addition, the Marine Fisheries Act 3/2001 is being reviewed in order to ensure that living marine resources are used under sustainable economic, environmental and social conditions and that this activity is committed to protecting the marine environment.

The future law will highlight the importance and rise in aquaculture, which is an alternative source of marine food products and market supply, taking into account the current trend of reducing fishing capacity in the interests of sustainability.

KEY MESSAGES

The Spanish fishing fleet has been diminishing since 1998, both in number of vessels (37.2%) and also in fishing capacity (26.3% in tonnage and 28.7% in power). In 2010, the number of vessels fell by 2.9% in comparison to 2009.

In general, the catches of the Spanish fishing fleet (relating to live weight) have also decreased since 1998, albeit recording annual fluctuations. However, in 2010 catches were up by 5.6% on 2009, amounting to 768,691 tonnes. In this sense, catches in adjacent waters increased by 12.5%, to 353,036 tonnes in 2010.

Total aquaculture production in Spain fell by 5.1% in 2010, inland aquaculture recording a downturn of 14.22%. Whilst total fish production has grown by 3% (marine production by 69.4% and inland production by -47.0%), the production of mussels, which is a very important part of aquaculture production, has fallen by 12.9%.

Fishing GVA increased in 2010, while fleet capacity, catches and aquaculture production all fell.

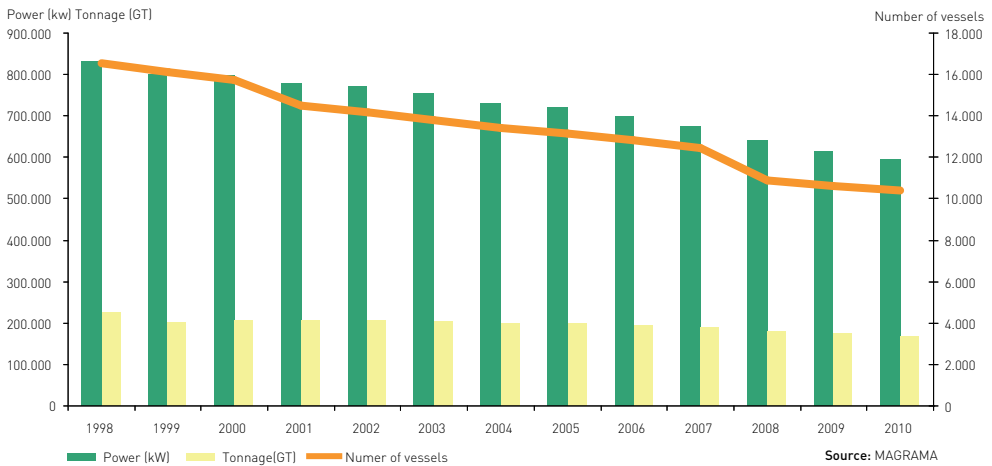
INDICATORS

- Number of vessels and fishing fleet capacity
- Fishing fleet catches
- Aquaculture production
- Eco-efficiency in fishing and aquaculture

Number of vessels and fishing fleet capacity

The Spanish fishing fleet continues to shrink, both in terms of vessel numbers and also capacity

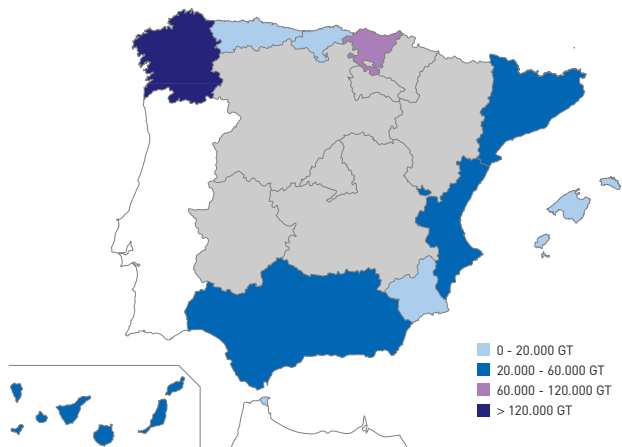
NUMBER OF VESSELS AND FISHING FLEET CAPACITY
(Domestic fishing grounds)



The number of vessels in the Spanish fishing fleet decreased by 2.9% in 2010 from 11,116 vessels as at 31 December 2009 to 10,847 vessels on the same date in 2010. Of the vessels that made up the fleet on December 31, 2010, a total of 10,404 operated in Spanish fishing grounds.

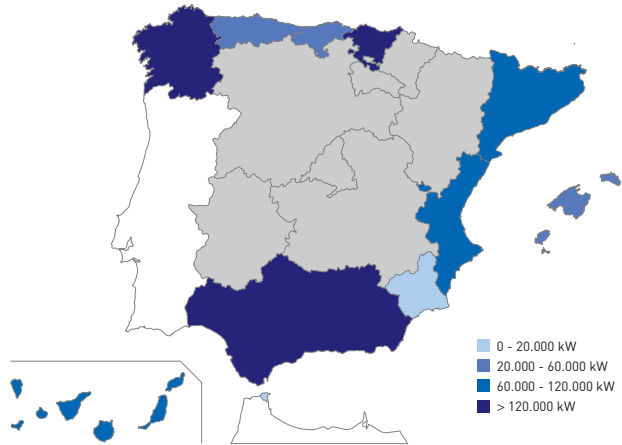
FISHING FLEET TONNAGE, 31 DECEMBER 2010

ALL FISHING GROUNDS	
AC	Tonnage (GT)
Andalusia	49,180
Asturias	7,835
Balearic Islands	3,801
Canary Islands	26,772
Cantabria	9,515
Catalonia	24,731
Ceuta	12,231
Galicia	173,054
Murcia	3,308
Basque Country	83,699
Valencia	20,837



FISHING FLEET POWER, 31 DECEMBER 2010

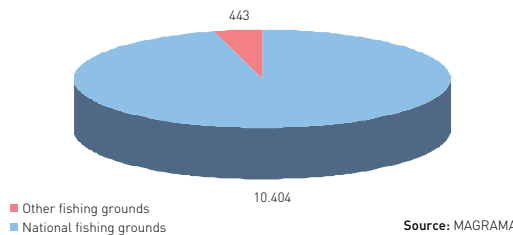
ALL FISHING GROUNDS	
AC	Potencia (kW)
Andalusia	143,201
Asturias	21,528
Balearic Islands	22,061
Canary Islands	60,481
Cantabria	22,797
Catalonia	107,330
Ceuta	15,861
Galicia	313,280
Murcia	12,574
Basque Country	140,095
Valencia	74,187



Source: Secretariat-General for the Sea, MAGRAMA.

Between 1998 and 2010, the number of vessels in the Spanish fishing fleet decreased by 37.2%, tonnage (GT) by 26.3% and power (kW) by 28.7%. By Autonomous Community, Galicia, the Basque Country and Andalusia have the largest fishing fleets in terms of both tonnage and power.

SPANISH FISHING FLEET DISTRIBUTION BY FISHING GROUND. 2010 (N° vessels)



Source: MAGRAMA

NOTES

- This indicator refers to the vessels on List 3 of Spain's General Vessel Register that make up the Statistical Register of Fishing Vessels in service on 31 December each year. Over the course of a year, some of these vessels may move between fishing grounds, meaning that the total figure may vary depending on the date in question. A significant number of vessels operate in small-scale fisheries and some even lack a built-in engine.
- For the purpose of calculating the indicator, fishing capacity, in accordance with Council Regulation (EC) 2371/2002, is stated in terms of power, measured in kilowatts (kW), and carrying capacity (tonnage), measured in Gross Tonnes (GT). This latter unit replaced gross registered tonnage (grt) in 1998.

SOURCES

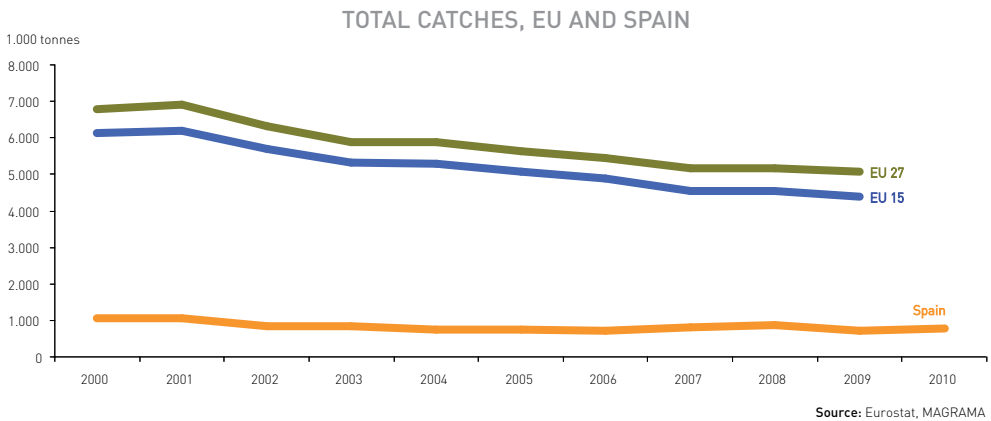
- Data provided by the Secretariat-General for the Sea. Ministry of Agriculture, Food and Environment.

FURTHER INFORMATION

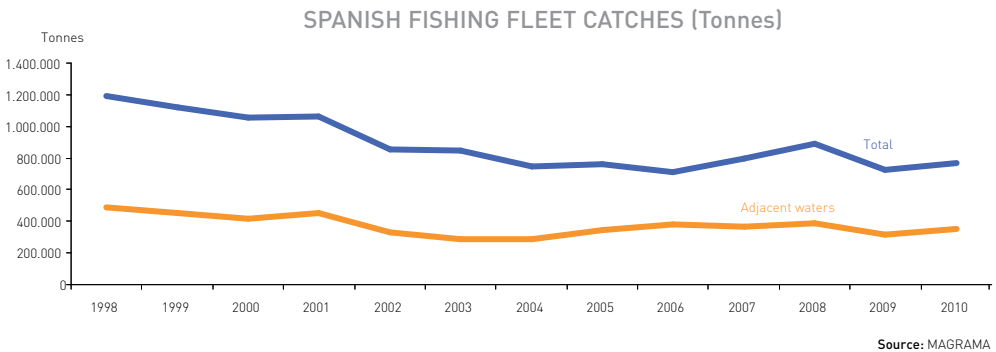
- <http://www.magrama.es>
- <http://epp.eurostat.ec.europa.eu/>

Fishing fleet catches

The total catch landed by the Spanish fishing fleet in 2010 was 5.6% higher than in 2009



Fishing catches are, primarily, those landed by Spanish fishing vessels in any of the fishing grounds they operate in, regardless of whether they belong to Spain, other EU countries or third international countries. According to Sea Fishing Catch and Landing Statistics, total catches made by the Spanish fishing fleet (relating to live weight) in 2010 rose by 5.6% from 727,993 tonnes in 2009 to 768,691 tonnes in 2010.

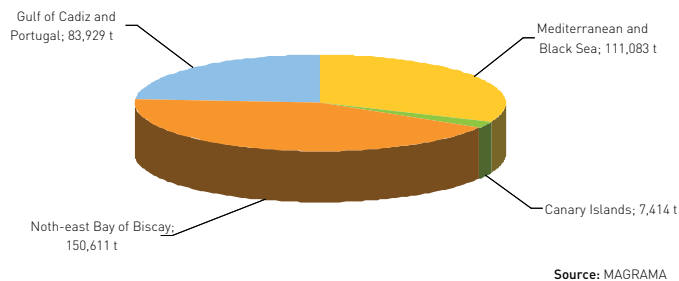


Catches in adjacent waters witnessed a 12.5% increase from 313,703 tonnes in 2009 to 353,036 tonnes in 2010.

By area, catches in the Bay of Biscay and the Mediterranean were up slightly, recording increases of around 5%. Total catches in the Bay of Biscay amounted to 150,611 tonnes (annual increase of 5.4%) and in the Mediterranean to 111,083 tonnes (up by 4.9%).

However, catches in the Gulf of Cadiz and the Canary Islands fell significantly. In the Gulf of Cadiz catches decreased by 49.9% (83,929 tonnes), while in the Canary Islands catches dropped by 36.4% (7,414 tonnes).

CATCHES IN ADJACENT WATERS BY GEOGRAPHICAL AREA (2010)



NOTES

- The data used for the Mediterranean, Bay of Biscay–North-West, Gulf of Cadiz and Canary Islands fishing grounds, respectively, are taken from the EUROSTAT figures for the “Mediterranean and Black Sea”, “North-East Atlantic, zone R27-08 c”, “North-East Atlantic, zone R27-09a”, and “Central Eastern Atlantic, zone 34.1.2”.

SOURCES

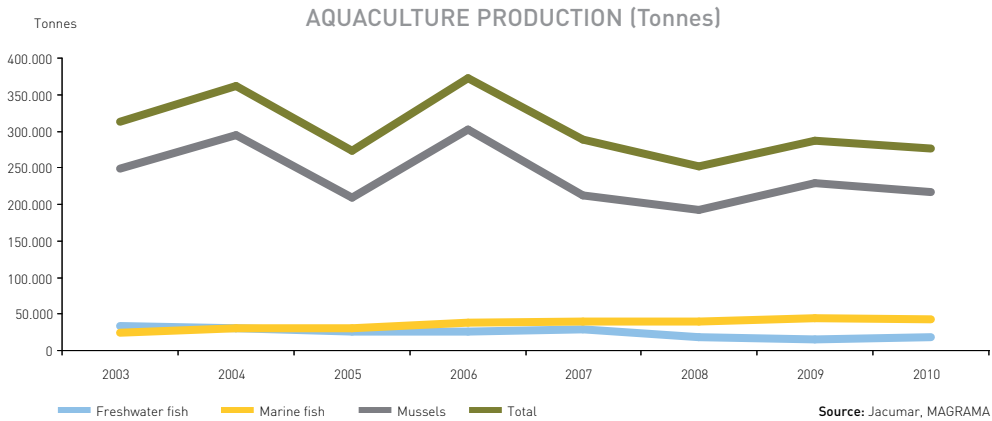
- Ministry of Agriculture, Food and Environment, 2011. Sea Fishing Catch and Landing Statistics. 1992-2010 series.
- EUROSTAT Data, Fisheries

FURTHER INFORMATION

- <http://www.magrama.es>
- <http://epp.eurostat.cec.eu.int/>

Aquaculture production

Marine aquaculture production has increased by 70% since 2003



Faced with growing worldwide demand for fish and the state of some fishing grounds, both marine and inland aquaculture are emerging as alternative means of meeting this demand.

Aquaculture, which has a great potential to contribute to the growth of national economies, can provide support for the sustainable livelihoods of many communities, as an activity that creates employment and contributes to household economies. The Fisheries and Aquaculture Department of FAO in its 2010 report on *“The State of World Fisheries and Aquaculture”* said that while growth in global aquaculture is decreasing, it still remains the fastest-growing field of animal food production and currently accounts for nearly half (46%) the total supply of edible fish.

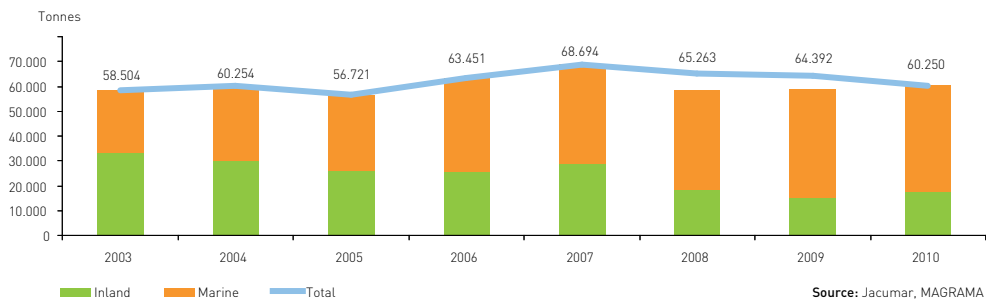
The wide variety of enclaves in Spain for farming marine and inland species has resulted in the growth of multiple production systems that have seen Spain become one of the top 20 aquaculture producers in the world and the second largest in the European Union, with more than 280,000 tonnes per year. In Spain, total aquaculture production in 2010 was 5.1% lower than the year before. This decline can be attributed to the production of mussels, which fell from 228,596 tonnes in 2009 to 216,745 in 2010, a decrease of 5.2%. Over the period 2003-2010, total aquaculture production decreased by 10.24% (including marine and inland fish production and mussels).

Fishing production as a whole fell by 6.87% over the last year to 60,250 tonnes. Inland aquaculture recorded a 14.22% decrease mainly due to the production of

rainbow trout, which fell from 20,435.5 tonnes in 2009 to 17,491.9 tonnes in 2010. The trend in marine fish farming displayed a slight downturn of 2.8% in 2010, producing 42,549 tonnes. Although the trend in production by species is different, the decrease is mainly due to the reduction in the production of sea-bream (from 21,319 to 19,080 tonnes) and turbot (7,628 to 6,866 tonnes), although the production of species such as the meagre rose significantly (from 1,088 tonnes to 2,661 tonnes).

Spain's aquaculture industry comprised 5,168 companies in 2011, of which 4,985 (96.5%) are located in marine areas and the remainder on inland waters (183 companies). Overall, vertical farming (shellfish), mainly mussels, accounts for 71% of production, while 22.6% of production is horizontal and only 3.6% of production is farmed on land.

INLAND AND MARINE AQUACULTURE PRODUCTION (Tonnes)



SOURCES

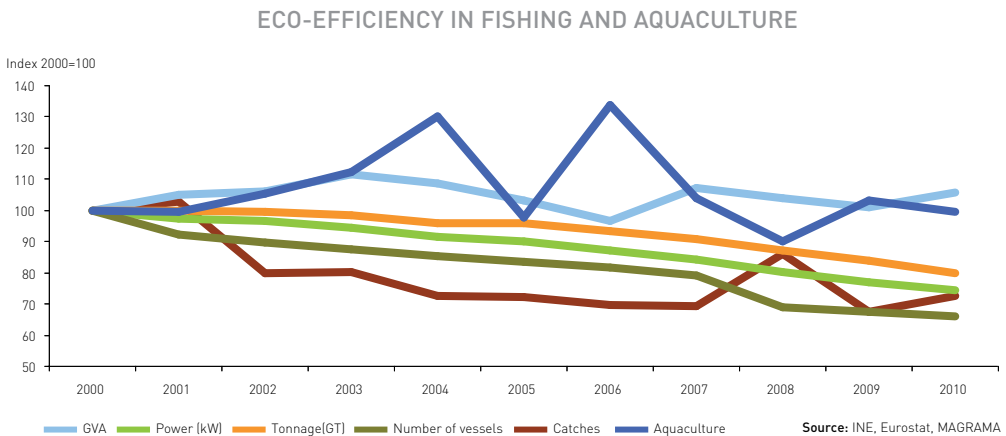
- ACUMAR, National Sea Harvest Advisory Board. Ministry of Agriculture, Food and Environment.
- Official Statistics on Fisheries and Aquaculture 2010. Ministry of Agriculture, Food and Environment.

FURTHER INFORMATION

- www.magrama.es

Eco-efficiency in fishing and aquaculture

Fleet capacity, catches and aquaculture production continue to decrease. In contrast, GVA increased over the same period



Gross Value Added in Agriculture, Livestock and Fisheries at current prices increased by 4.7% in 2010, from 24,298 million euros in 2009 to 25,454 million in 2010.

However, this increase occurred at the same time as a change in trend in fishing variables. In this sense, the number of vessels fell by 2.5% from the 11,116 in 2009 to 10,847 in 2010. This decrease also affected the capacity of the fleet, which shrank by 4.6% in terms of power (kW) and 5.6% in terms of tonnage (GT). As shown in the graph, over the last ten years the Spanish fishing fleet's power, tonnage and number of vessels have all gradually decreased. This decline is the result of both national and community Fishing Policy directives, which for the past few years has been committed to adjusting fleet capacity to available resources in pursuit of more responsible and sustainable management of fisheries.

Notwithstanding, and despite fleet capacity still being in the process of adjusting, catches increased by 5.6% in 2010 to 768,691 tonnes. As shown in the graph, although the general trend in the number of catches over the past decade is downward, the irregular pattern experienced in the last three years places the level of catches in line with the average for the decade. On a different note, despite the remarkable growth in inland aquaculture, calculated at 16.9% in the past year, aquaculture production as a whole fell by 3.7% in comparison with the previous year.

As we can see, this variable displays the largest annual fluctuations, mainly caused by the variability in the production of mussels in Galicia.

Finally, Gross Value Added (at current prices) for Agriculture, Livestock and Fisheries as a whole displays an upward trend, albeit with slight fluctuations over the past 10 years under consideration.

NOTES

- It was not possible to obtain a breakdown of data for Agriculture, Livestock, Forestry and Fisheries to calculate Gross Value Added in 2010. For this reason, Gross Value Added data at basic prices (total industry), reference year 2000=100, provided by the National Institute of Statistics have been used to analyse the indicator.

SOURCES

- GVA: Spanish National Accounts. INE.
- No. of vessels, power and tonnage: Secretariat-General for the Sea. Ministry of Agriculture, Food and Environment.
- Catches: Eurostat Data, Fisheries.
- Marine aquaculture: Jacumar, Secretariat-General for the Sea. Ministry of Agriculture, Food and Environment.

FURTHER INFORMATION

- <http://www.magrama.es>
- <http://www.ine.es>
- <http://epp.eurostat.ec.europa.eu/>