

2.9

FISHERIES



The European Union's fishing industry is the world's third largest, catching almost 7 million tonnes of fish a year. European fisheries policy is common to all countries in the EU, which has the world's largest maritime area. The EU has 1200 ports, and close to 400,000 jobs depend on fishing and the industries which process its products.

Fisheries policy and the environment are increasingly seen as going hand in hand. The EU is broadening its perspectives in order to integrate all aspects of the marine environment, via maritime research, technology and innovation values, in accordance with the Lisbon Strategy and the EU's global compromise to ensure that economic progress does not have a negative impact on environmental sustainability. This integrated maritime policy therefore covers sea transport, the competitiveness of maritime companies, scientific research, fishing and protection of the marine environment.

Its objectives include guaranteeing the fishing industry's long-term viability through the conservation, management and exploitation of fishing resources, limiting fishing's impact on the environment and adapting fishing capacity to these considerations. In compliance with these goals, the EU passed Council Regulation (EC) 734/2008, of 15 July 2008, on the



protection of vulnerable marine ecosystems in the high seas from the adverse impacts of bottom fishing gears. Upon Spain's request, and in accordance with the 2006 UN resolution, bottom fishing cannot be undertaken in any region of the high seas where its impact on the sea floor has not been assessed scientifically. This means that bottom fishing cannot be undertaken in those regions identified as containing vulnerable marine ecosystems. The approval of Council Regulation 1005/2008, in September 2008, which establishes a common system to prevent, deter and eliminate illegal, unreported and unregulated fishing, is also worthy of mention.

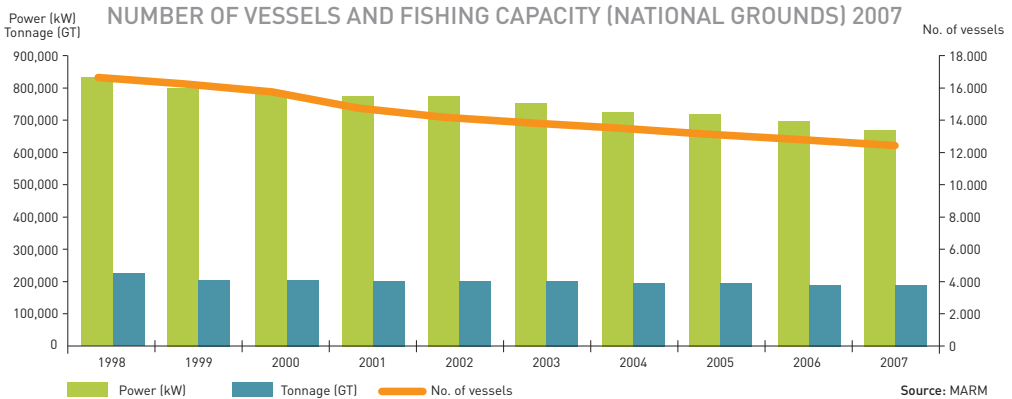
The size of the EU-25's fleet has dropped from 88,467 vessels in 2005 to 87,004 in 2006, according to data from Eurostat. The Spanish fleet accounts for 21.12% of this

INDICATOR	GOAL	TREND
Number of vessels and fishing fleet capacity	Adjust fishing capacity to sustainable limits	Reduce the number of vessels and the power of the Spanish fleet
Fishing fleet catches	Contribute to food security and facilitate fishing grounds' recovery	Increase the total landed catches for the Spanish fleet slightly
Aquaculture production	Increase and diversify production	Variations in mussel production reduce the total volume of aquaculture production
Eco-efficiency in the fishing and aquaculture sectors	Sustainable resource exploitation	The sector's Gross Added Value increases despite the reduction in the fleet's power.

reduction. In Spain, the fishing industry as a whole (including fishing, aquaculture, processing and sales) represents around 1% of the country's Gross Domestic Product. In areas that rely on fishing, however, this sector can contribute 10% or more to local GDP. All of Spain's coastal Autonomous Regions have interests in the fishing sector, particularly Galicia, Andalusia, the Basque Country and the Canary Islands. Marine aquaculture grew in 2007, especially due to an increase in fish production.

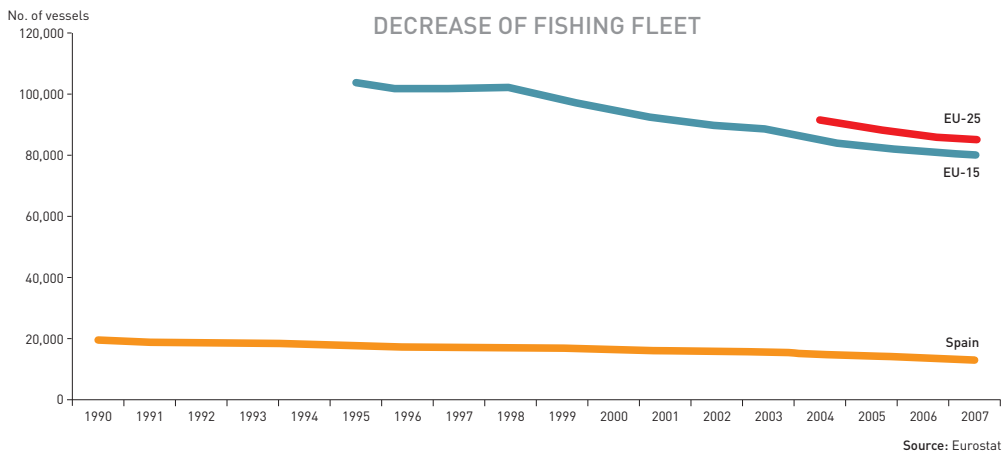
Number of vessels and fishing fleet capacity

The reduction in the number of vessels in the Spanish fishing fleet was greater than in the European fleet



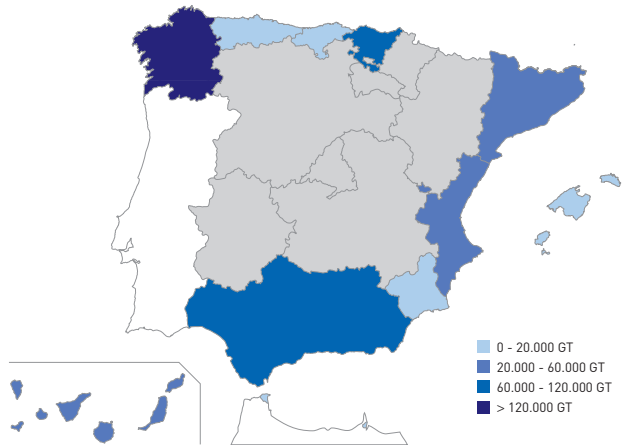
The number of vessels in the EU-15's fishing fleet decreased by 1.9% in 2007 with respect to 2006, according to Eurostat figures. The EU-25's fishing fleet suffered a similar decrease, whereas the Spanish fishing fleet in all fishing grounds decreased by slightly more (2.9%).

As of December 31st, 2007, the Spanish fishing fleet consisted of 13,006 vessels, 12,475 of which were operating in national fishing grounds and 531 in others. The fleet's tonnage and power also decreased, although total catches did not.



TONNAGE OF THE FISHING FLEET (December 2007)

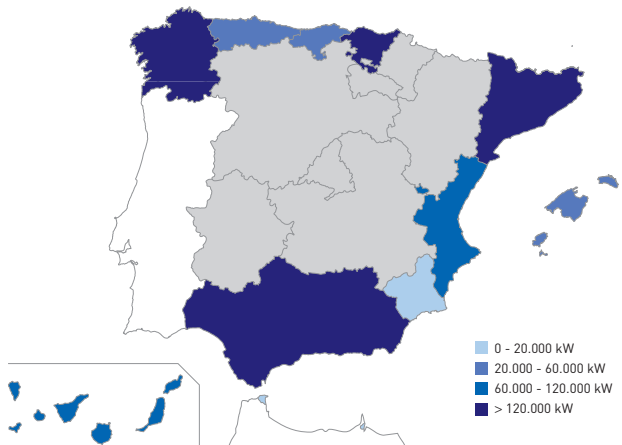
TOTAL FISHING GROUNDS	
Community	Tonnage (GT)
Andalusia	57,148
Asturias	10,772
Balearic Islands	3,985
Canary Islands	32,368
Cantabria	10,898
Catalonia	26,863
Ceuta	12,974
Galicia	195,845
Melilla	287
Murcia	3,785
Basque Country	86,940
Valencia	26,173



Source: MARM

POWER OF THE FISHING FLEET (December 2007)

TOTAL FISHING GROUNDS	
Community	Power (kW)
Andalusia	164,784
Asturias	26,766
Balearic Islands	23,215
Canary Islands	67,546
Cantabria	26,021
Catalonia	122,374
Ceuta	17,407
Galicia	349,306
Melilla	1,005
Murcia	14,872
Basque Country	149,808
Valencia	95,228



Source: MARM

NOTES

- This indicator refers to vessels in List 3 in the General Shipping Registry, which makes up the Operational Fishing Fleet active as of December 31 each year. Some of these vessels may change fishing ground during the year, which means that their total may differ depending on the date. A large number of these vessels are traditional fishing boats and some even have no fixed engine.
- To calculate this indicator, the fishing capacity, in accordance with regulation 2371/2002/EC of the Council, is expressed in terms of power, in kilowatts (kW), and load capacity (gross tonnage). This unit replaced gross register tonnage in 1998.

SOURCES

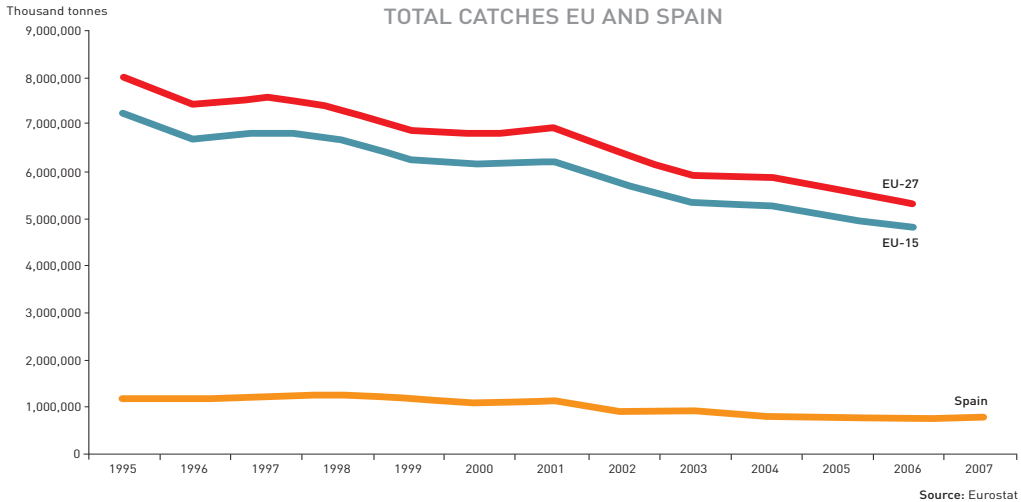
- Data provided by the General Secretariat for the Sea. MARM.
- EU data, Eurostat (<http://epp.eurostat.ec.europa.eu>) webpage, "Data", "fishing fleet".

MORE INFORMATION

- <http://www.marm.es>
- <http://epp.eurostat.ec.eu.int/>

Fishing fleet catches

Landed Spanish catches increased by 6.8% in 2007

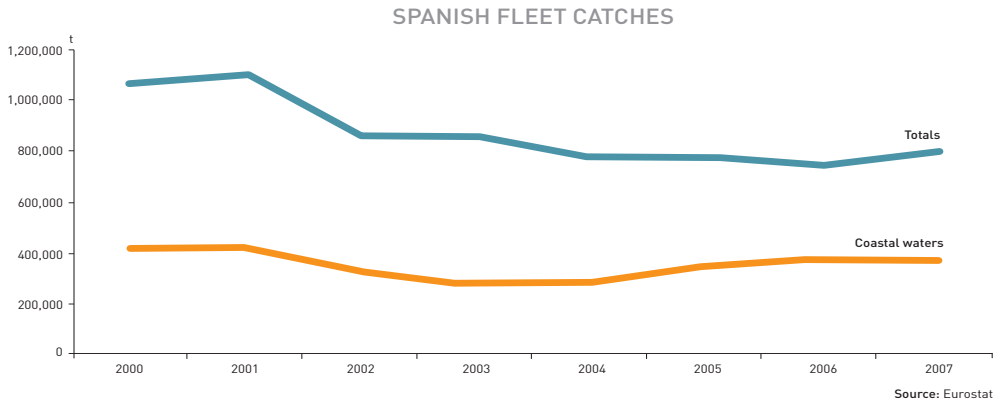


The data for this indicator, obtained from Eurostat, are expressed in terms of live weight equivalent for the landings. They do not include products which, for whatever reason, are not landed.

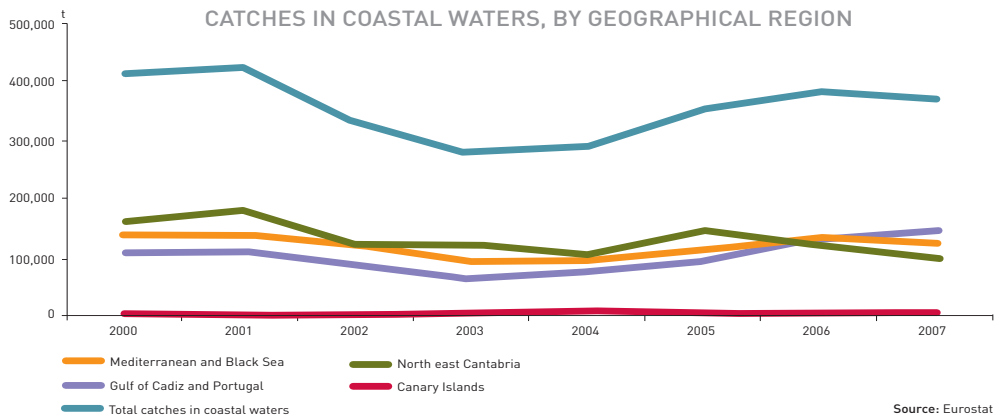
Around 90% of the European fleet's fish catches come from waters in the NE Atlantic where, according to the European Environment Agency, more than a quarter of the commercial fish populations assessed are outside the biological safety limits. The measures put into place by the EU include the creation of the European Fisheries Agency and the Action Plan to ensure compliance with fishing restrictions, eradicate illegal landings and uncontrolled or unregulated fishing.

Pan-European seas commonly suffer from overfishing and some species are outside the biological safety limits. Around 10-20% of stocks in the Aegean and Cretan Seas are considered to be outside these limits, and the stock of Red Tuna in both the eastern Atlantic and the Mediterranean is considered to be essentially exhausted.

The evolution of the Spanish fleet's captures is a mirror image of that seen last year. Thus, catches in coastal waters decreased by 3.22% in 2007 with respect to 2006, whereas total catches (in both national and international fishing grounds) increased by 6.86%.

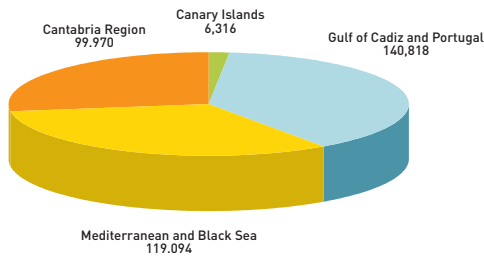


The evolution of catches in coastal waters was very different in 2007 in comparison with the situation in 2006. In the Cantabrian region, for example, catches decreased by 11.47%, and they also decreased in the Mediterranean and Black Sea (by 8.8%). The decrease in the Canary Islands region was even greater, at 37.50%, whereas catches in the Gulf of Cadiz and in Portuguese waters increased by 12.95%.



Marine reserves are a specific measure that helps to achieve sustainable exploitation of fisheries resources by enabling specific protection measures in defined regions of traditional fishing grounds. These regions have contributed to a significant recovery in the fishing grounds. Ten marine reserves have been established in Spanish waters: Cabo de Gata, Cabo de Palos-Islas Hormigas, Cala Rajada-Levante de Mallorca, Isla de Alborán, Islas Columbretes, Isla Graciosa, Isla de Tabarca, La Palma, La Restinga-Mar de las Calmas and Masía Blanca.

CATCHES IN COASTAL WATERS, BY GEOGRAPHICAL AREA, 2007 (t)



Source: Eurostat

SOURCES

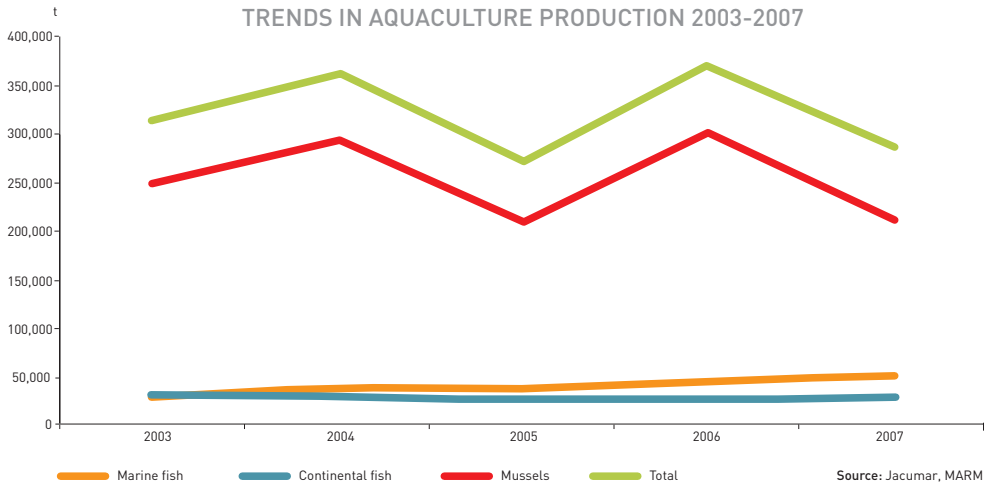
- EUROSTAT, Data, Fisheries. The Eurostat data for the regions "Mediterranean and Black Sea", "NE Atlantic, zone R27-08 c", "NE Atlantic, zone R27-09a" and "Central-Eastern Atlantic, zone 34.1.2" were used for the Mediterranean, NE-Cantabrian, Gulf of Cadiz and Canary Islands zones, respectively.

MORE INFORMATION

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

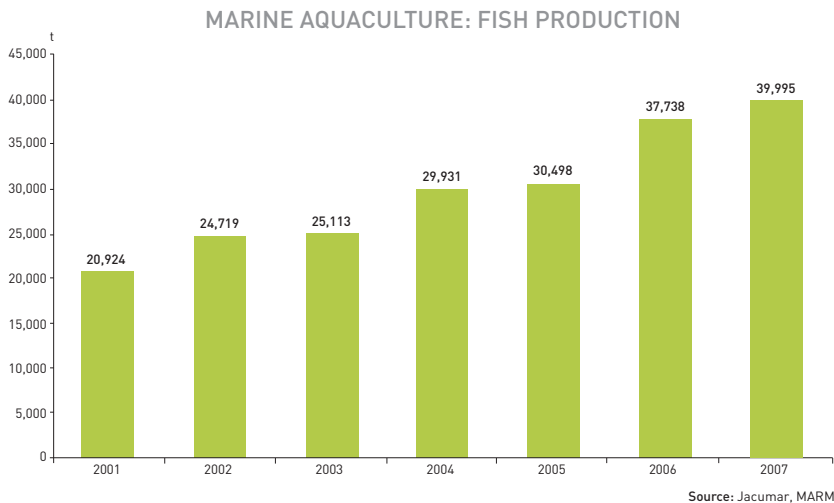
Aquaculture production

Spanish aquaculture production varies in volume depending on mussel production



The overall figures for Spanish aquaculture production over the past few years mirror the significant variations in mussel production, which represents almost 80% of the total number of tonnes produced and close to 30% in economic terms.

Mussel production in 2007 was 211,983 tonnes, a decrease of almost 30% (29.78%) with respect to 2006.



The good fish production figures for marine aquaculture were maintained. Gilthead bream production increased by 11.32% with respect to 2006 to 19,855.4 tonnes and sea bass production increased by 6.37% to 10,049.21 tonnes, whereas turbot production decreased by 2.88% to 6,035 tonnes.

Fish production in inland aquaculture also increased in general terms, with rainbow trout production increasing by 11.52% to 28,416.65 tonnes.

Aquaculture has begun to be considered a possible alternative to wild fishing for human consumption. The European Environment Agency (“The environment in Europe: fourth assessment”, 2007) considers, however, a series of impacts it may have on the environment. These include the eutrophication and localised enrichment of sediments, the use of wild fish to manufacture feed for fish farms (4 kg of wild fish are required to raise 1 kg of farmed salmon), the use of antibiotics, chemical products, etc.

On the basis of these figures, it can be seen that aquaculture is an alternative means of providing consumers with high-quality fish proteins and that it is gaining ground as a complementary activity to fishing and offers excellent prospects for economic growth and job creation.

SOURCES

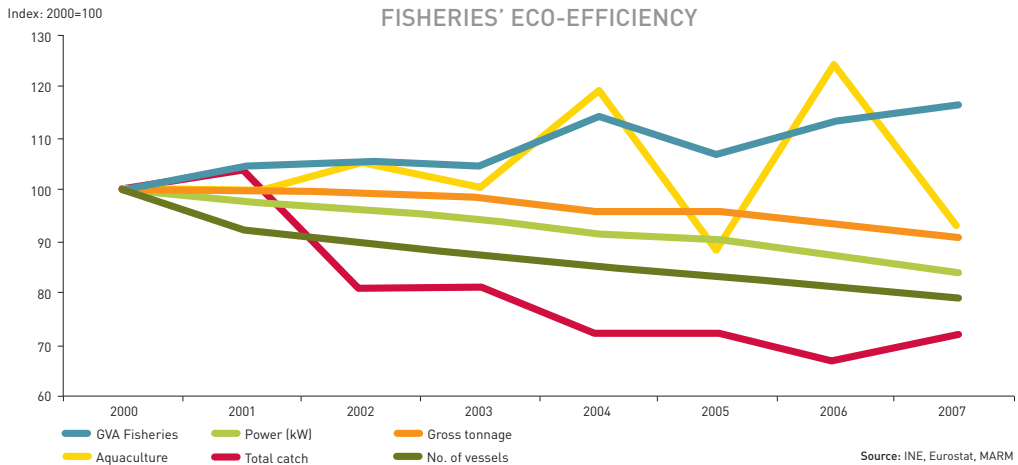
- JACUMAR, National Advisory Board for Marine Aquaculture. MARM.

MORE INFORMATION

- <http://www.marm.es>

Eco-efficiency in the fishing and aquaculture sectors

The increase in GVA and the decrease in fleet capacity were maintained in 2007



The Gross Value Added of the fisheries sector (at current prices) increased by 2.5% in 2007 with respect to 2006. This increase occurred at the same time as total catches also increased (by 6.86%). whereas the number of vessels decreased by 2.91%, the power decreased by 3.49% and the fleet's tonnage by 2.88%.

The Gross Value Added, which increased in the last two years for which data are available, varied, with increases due to the greater efficiency and modernisation of the sector. The variations in mussel production produce a series of peaks in aquaculture.

The sector's overall trend, as a result of the Common Fisheries Policy, is a continual decrease in fishing capacity and in catches landed by the Spanish fleet. This trend is not applicable to fish production in marine aquaculture facilities, where output continues to rise each year.

The sector's economic growth in the past few years has occurred at the same time as the number of vessels and the fleet's tonnage and power have decreased.

However, the increase in the sector's gross value added, which has occurred as total

catches have dropped every year since 2001, with a slight rebound in landed catches in 2007, is particularly significant.

NOTES

- Gross Value Added for the sector has been calculated using the Gross Value Added data at basic prices (reference year 2000=100) provided by the National Institute of Statistics.

SOURCES

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

MORE INFORMATION

- <http://www.marm.es>
- <http://www.ine.es>
- <http://epp.eurostat.ec.eu.int/>