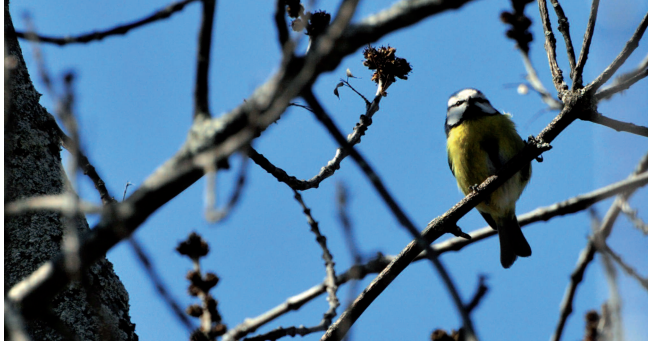


2.11

FISHING



The European Union's Common Fisheries Policy (CFP) is reviewed every 10 years to adapt it to changes in circumstances. The next reform will conclude in 2012 and the European Commission's aim is to produce an efficient CFP that preserves the marine environment, is easy to administer, and is integrated with other marine and coastal activities. At an international level, the Common Fisheries Policy should continue to promote the principle of responsible and sustainable fishing and development of coastal regions.

In 2008, Council Regulation 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, and Council Regulation 1005/2008 of September 2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing were adopted. In April 2009, the European Commission published the *Green Paper on the Reform of the Common Fisheries Policy*, which includes consideration of environmental issues during formulation of fisheries policy.

The Commission offers a realistic account of the situation and addresses negative aspects such as overfishing, overcapacity among the various fleets, and the sector's economic fragility. In fact, it is this eco-



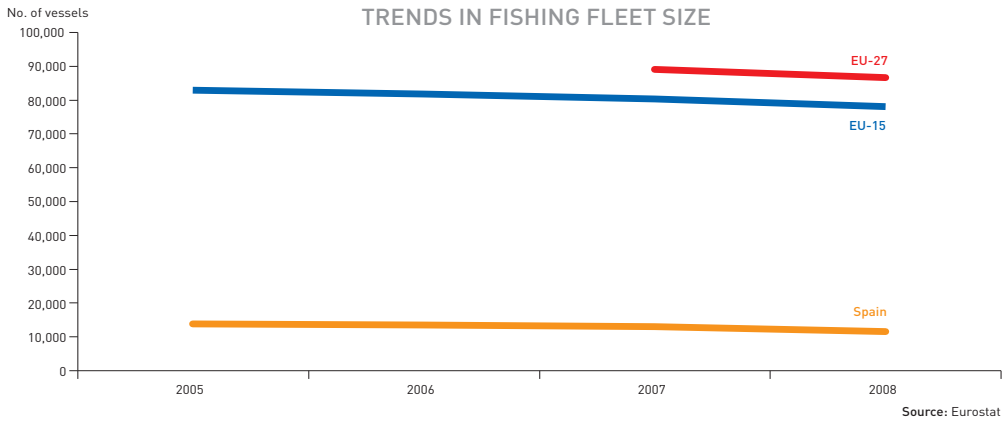
conomic fragility that leads to overfishing, which in turn can harm fish stocks. In addition to these aspects, it also considers the progress made in relation to fishery sustainability since the 2002 reform of the CFP (long-term management plans, creation and implementation of Regional Advisory Councils, regulations, etc.).

In Spain, a Sustainable Fishing Bill, which was made available for public consultation in October–November 2009 and was approved by the Council of Ministers, is currently under debate. The bill aims to reinforce further the principles of fishery sustainability and responsible trade.

| INDICATOR | GOAL | TREND |
|--|---|--|
| Number of vessels and fishing fleet capacity | Keep fishing capacity within sustainable limits | Significant reduction in the number of vessels and, to a lesser extent, in the Spanish fishing fleet's power and carrying capacity |
| Fishing fleet catches | Contribute to food security and facilitate fishery recovery | Increase in the total catch landed by the Spanish fleet |
| Aquaculture production | Increase and diversify production | Mussel and freshwater fish production are declining, while marine fish production is increasing |
| Eco-efficiency of fishing and aquaculture | Achieve sustainable resource exploitation | The sector's GVA is falling due to the increase in fuel prices and the reduction of the fleet |

Number of vessels and fishing fleet capacity

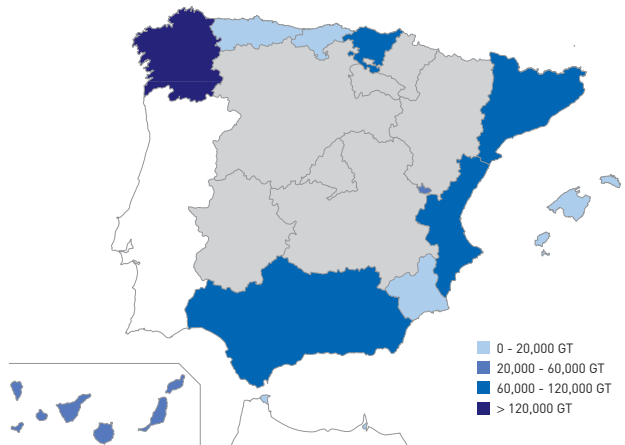
In a single year, the reduction in the Spanish fishing fleet was four times greater than the reduction in the European fleet



According to Eurostat figures, in 2008 the number of vessels in the European fishing fleet decreased year-on-year by around 3% (2.97% for the EU-15 and 2.71% for the EU-27). However, in the same period the Spanish fishing fleet's numbers dropped by 12.93%, four times higher than the EU average. Vessel power and tonnage also fell, albeit on a lesser scale — power, expressed in kW, decreased by 3.50% and carrying capacity (tonnage), expressed in gt (gross tonnes) decreased by 2.12%.

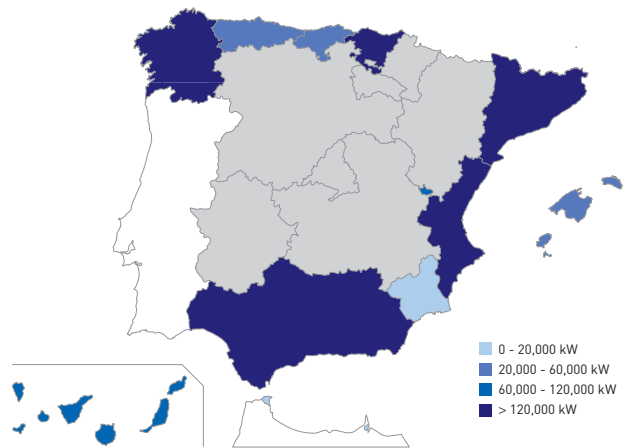
FISHING FLEET TONNAGE, 31/12/2008

| (by fishing ground) | |
|---------------------|--------------|
| AC | Tonnage (GT) |
| Andalusia | 55,474 |
| Asturias | 10,543 |
| Balearic Islands | 3,896 |
| Canary Islands | 30,112 |
| Cantabria | 10,758 |
| Catalonia | 25,458 |
| Ceuta | 13,981 |
| Galicia | 194,750 |
| Melilla | 209 |
| Murcia | 3,667 |
| Basque Country | 84,916 |
| Valencia | 24,415 |



FISHING FLEET POWER, 31/12/2008

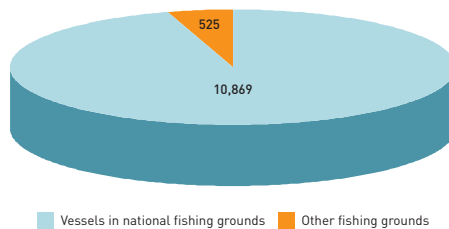
| (by fishing ground) | |
|---------------------|------------|
| AC | Power (kW) |
| Andalusia | 159,427 |
| Asturias | 26,135 |
| Balearic Islands | 22,549 |
| Canary Islands | 66,338 |
| Cantabria | 25,427 |
| Catalonia | 114,974 |
| Ceuta | 19,297 |
| Galicia | 343,688 |
| Melilla | 544 |
| Murcia | 13,928 |
| Basque Country | 143,457 |
| Valencia | 87,089 |



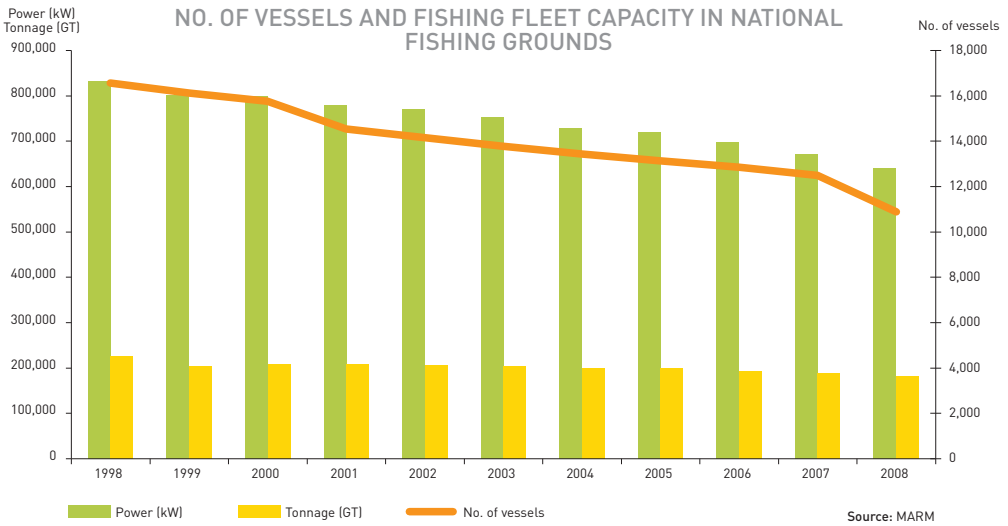
Source: Secretariat-General for the Sea, MARM

Of the 11,394 vessels that made up the Spanish fishing fleet on 31 December 2008, 10,869 operated in national fishing grounds and 525 fished in other waters. In terms of number of vessels, 71% of the Spanish fleet operated in small-scale fisheries (<12 miles, within EU waters). The tuna fleet, which comprises 33 vessels (0.29% of the total number of vessels), had a carrying capacity of 80,163 gt and a power of over 113,000 kW.

SPANISH FISHING FLEET DISTRIBUTION BY FISHING GROUND (31 december 2008)



Between 1998 and 2009, the number of vessels in Spain's fishing fleet fell by 35%, dropping from 17,518 to 11,394. In parallel, power (kW) and capacity (gt) also decreased.



NOTES

- This indicator refers to vessels on List 3 of the General Vessels Register (which in turn makes 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

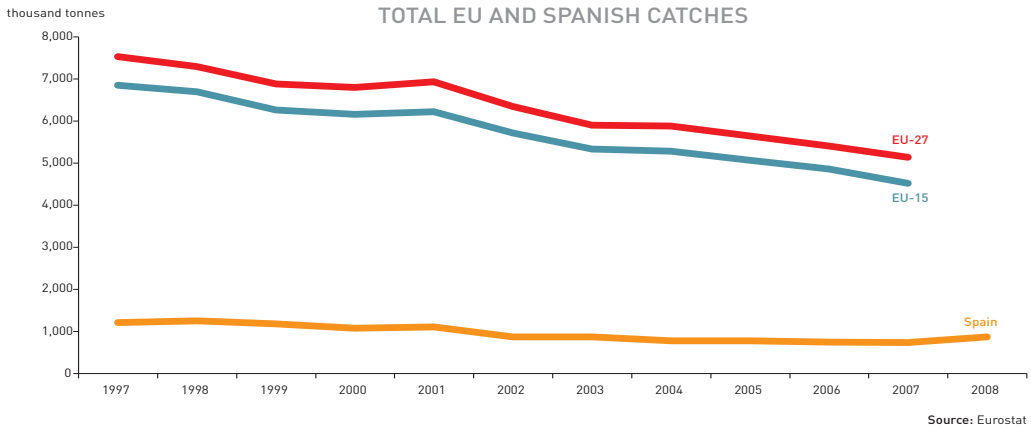
- Data provided by the Secretariat-General for the Sea. MARM.
- EU data taken from the Eurostat website: Data, Fishing fleet.

FURTHER INFORMATION

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

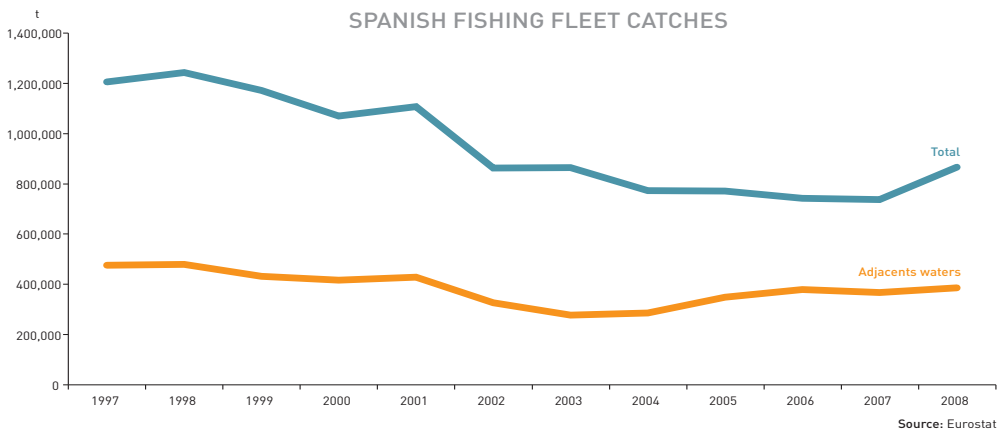
Fishing fleet catches

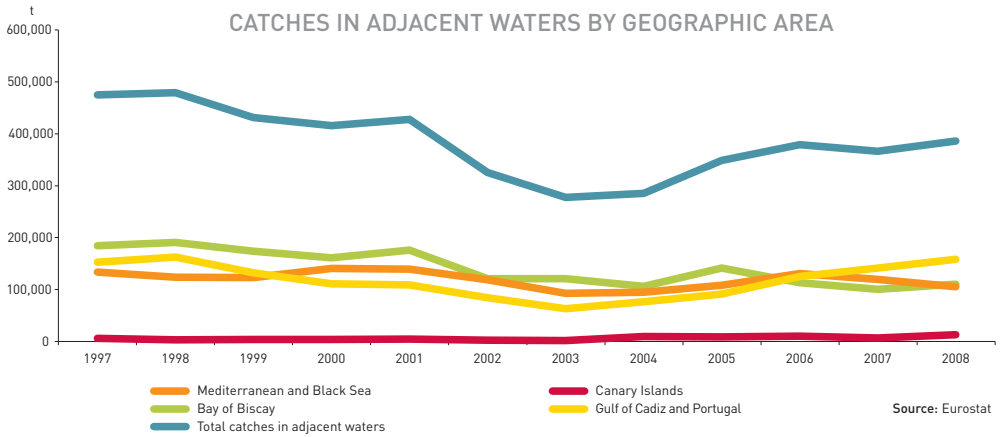
The total catch landed by the Spanish fleet rose by 17.5% in 2008



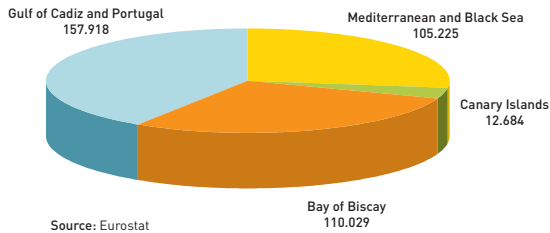
According to Eurostat figures, the Spanish fishing fleet's catch in 2008 was 17.5% greater than in 2007. It should be noted that these figures indicate the equivalent live weight landed and do not include products that, for various reasons, are not landed.

In 2008, catches in the Mediterranean fell by 11.65% on the previous year, while they increased in the fishing grounds in the Canary Islands, Bay of Biscay and Gulf of Cadiz. In general, catches in adjacent waters increased by 5.37% in 2008, a percentage well below the rise in the Spanish fleet's total annual catch (estimated by Eurostat to be 17.5%).





CATCHES IN ADJACENT WATERS BY GEOGRAPHIC AREA (2008) (t)



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

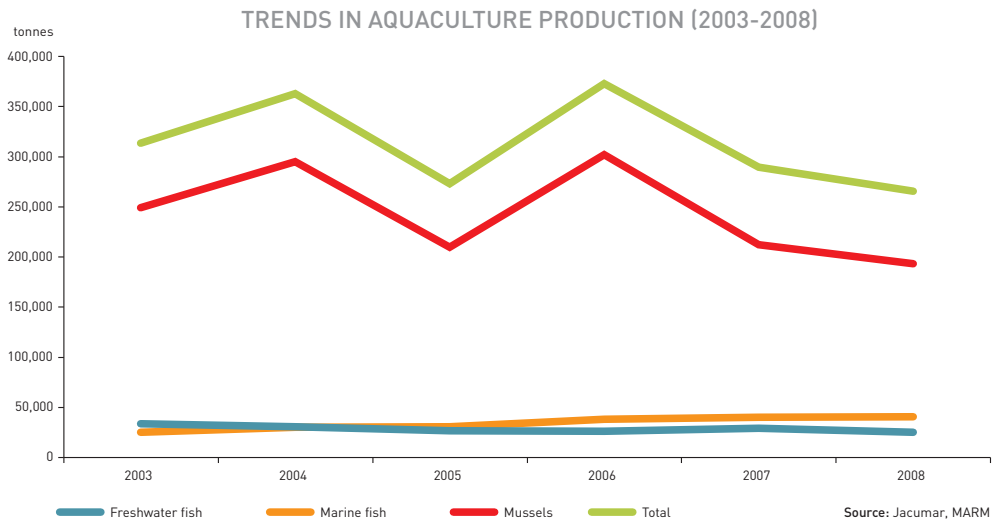
- Eurostat: Data. Fisheries.

FURTHER INFORMATION

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

Aquaculture production

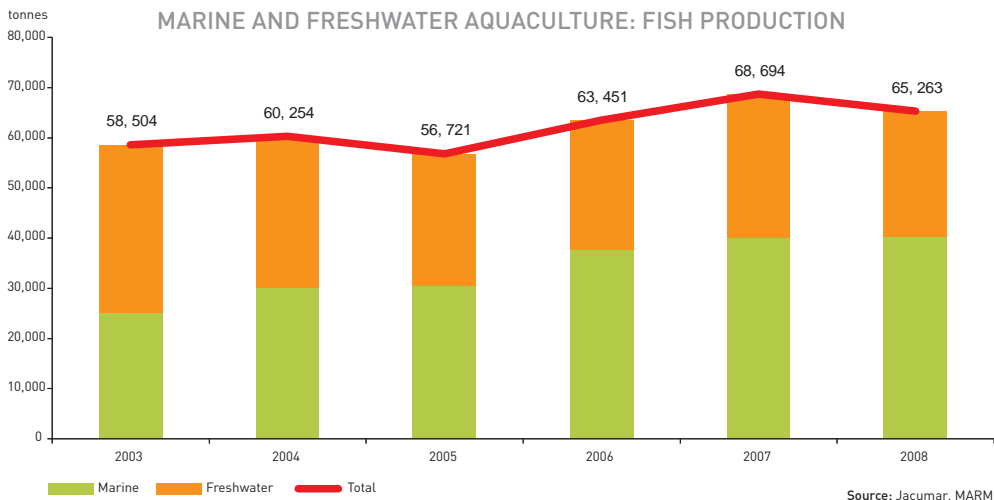
Mussel and freshwater fish production declined, while marine fish production increased



In 2008, overall aquaculture production was almost 8% lower than in 2007, falling from 289,000 tonnes to 265,000 tonnes. This downturn was due primarily to a drop in mussel production, which decreased from almost 212,000 tonnes in 2007 to approximately 193,000 in 2008. Marine fish production rose slightly to stand at over 40,000 tonnes, while that of freshwater fish declined, dropping from nearly 29,000 tonnes in 2007 to just below 25,000 in 2008.

Within the fish-farming segment, production of rainbow trout decreased by 14.2% (from 28,400 t in 2007 to 24,300 t in 2008), that of gilt-head sea-bream rose by 4.4% (from 19,900 t in 2007 to 20,700 t in 2008), that of European sea-bass fell by 10.5% (from 10,000 t in 2007 to 8,900 t in 2008) and that of turbot increased substantially, rising by 18.1% (from 6,000 t in 2007 to 7,100 t in 2008).

Aquaculture remains a valid alternative means of providing consumers with high-quality fish proteins and is establishing itself as a complement to fishing that offers excellent prospects for economic growth and job creation.



SOURCES

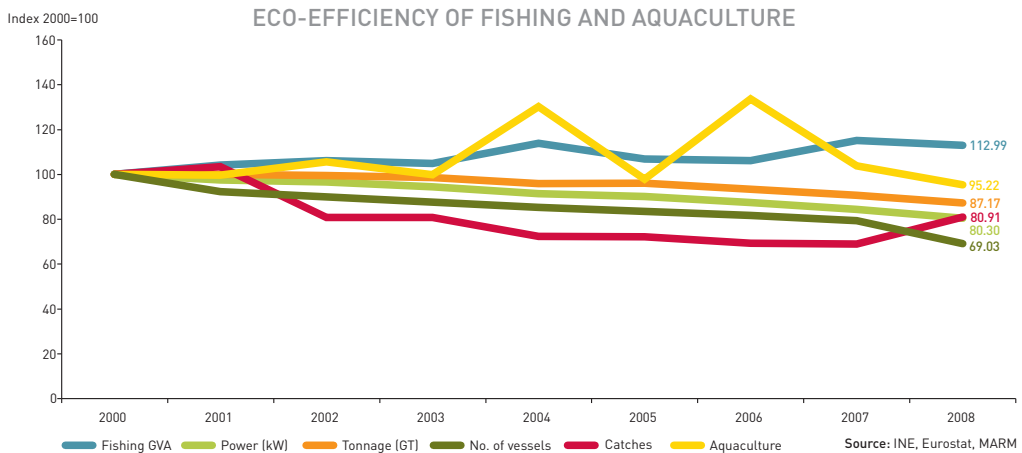
- JACUMAR, MARM.

FURTHER INFORMATION

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

Eco-efficiency of fishing and aquaculture

There was a pronounced reduction in fishing fleet capacity and the downward trend in mussel production continued



In 2008, the sector's gross value added (at current prices) decreased slightly (by around 1%). Larger decreases were recorded in fleet power (around 4%), tonnage (over 3%) and, above all, in the number of vessels, which fell by 12.8% in comparison with the previous year. Aquaculture production also dropped slightly (mainly attributable to a downturn in mussel production), while the estimated catch moved closer to the 2003 figure again.

The socio-economic sustainability needed by the sector is conditioned by factors such as increases in the price of fuel, which rose in 2007 and 2008. Economically driven reactions to these factors, such as increasing catches, could be detrimental to biological sustainability. The quest to balance these two aspects underlies the EU's regulatory efforts as it seeks to achieve socially and environmentally sustainable exploitation of fishery resources.

NOTES

- For the purpose of calculating the sector's gross value added, data for GVA at basic prices (reference year 2000=100) provided by the INE have been used.

SOURCES

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

FURTHER INFORMATION

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

