

# 2.9 FISHING



European fisheries policy is common to all EU countries. 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. European measures are gradually being implemented in an attempt to apply an ecosystem-friendly fisheries management regime that takes into account the standard of living of those whose livelihood depends on fishing as well as consumer interests.

In Spain, the fishing industry as a whole (including fishing, aquaculture, processing and sale) represents around 1% of the country's Gross Domestic Product. In areas that rely on fishing, this sector can contribute 10% or more to local GDP. All of Spain's coastal Autonomous Communities have interests in the fishing sector, particularly Galicia, Andalusia, the Basque Country and the Canary Islands.

According to Eurostat figures, the EU-25 fishing fleet dropped from 88,467 vessels in 2005 to 87,004 in 2006, with 21.12% of this fall resulting from reductions in the Spanish fleet.

When calculating the indicators, a distinction is made between total catch and catches in adjacent waters, the latter being understood as catches made in marine ecosystems within 200 miles of the coastline of Spain



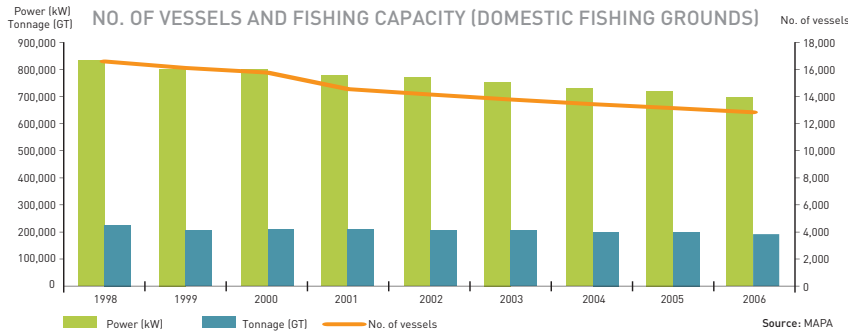
national territory (Northwest-Bay of Biscay, Gulf of Cadiz, Canary Islands and the Mediterranean). The total catch dropped from 769,000 tonnes in 2004 to 711,000 tonnes in 2006, although catches in adjacent waters increased from 255,000 tonnes to 390,000 tonnes over the same period.

There was a significant increase in aquaculture in 2006, with a particular rise in mussel production following the previous year's drop in output. Meanwhile, fish production continued to rise.

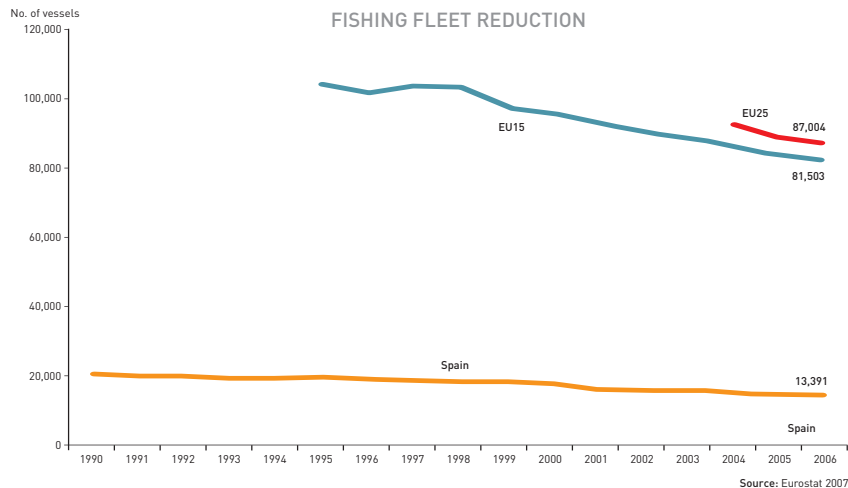
INDICATOR	GOAL	TREND
<b>Number of vessels and fishing fleet capacity</b>	Adjust fishing capacity to sustainable limits	Spain's fishing fleet continues to decrease in terms of number of vessels and capacity
<b>Fishing fleet catches</b>	Contribute to food security and facilitate fishing grounds' recovery	Total catch is decreasing slightly, although catches in adjacent waters are rising
<b>Aquaculture production</b>	Increase and diversify production	Further rise in mussel and fish production
<b>Eco-efficiency in the fishing and aquaculture sectors</b>	Sustainable resource exploitation	Falling fleet capacity, catches and GVA

# Number of vessels and fishing fleet capacity

Spain's fishing fleet continues to decrease in terms of number of vessels and capacity



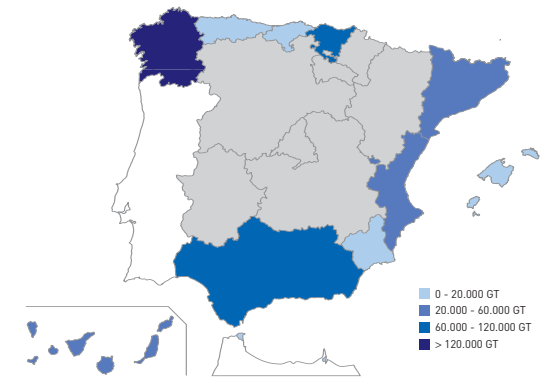
The number of Spanish fishing fleet vessels operating in all fishing grounds fell from 13,694 on 31 December 2005 to 13,398 on 31 December 2006. Overall fleet tonnage and power also declined over the year. In July 2006, Spain's main port structure consisted of 78 ports in Galicia, 56 in the Canary Islands, 39 in Catalonia and 38 in Andalusia.



Trap netting, which is used to catch blue-fin tuna and other species (bonito, frigate mackerel, swordfish, etc.), has a long tradition in Spain. This method of fishing is employed predominantly in the South-Atlantic region, where it is restricted to five authorised trap-net fisheries, an auxiliary fleet of 97 vessels and 1,693 GT. There are also two trap-net fisheries in the Mediterranean. In 2006, the catch from these trap-net fisheries was approximately 985,000 kg, 83% of which was blue-fin tuna.

FISHING FLEET TONNAGE (December 2006)

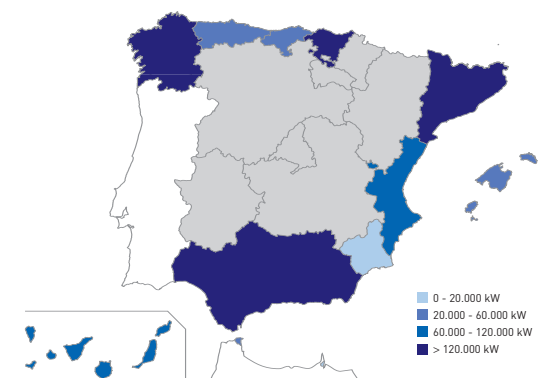
ALL FISHING GROUNDS	
Auton. Comm.	Tonnage (GT)
Andalusia	62,009
Asturias	11,948
Balearic Islands	3,912
Canary Islands	35,204
Cantabria	11,125
Catalonia	26,917
Ceuta	12,655
Galicia	199,722
Melilla	323
Murcia	4,187
Basque Country	85,478
Valencia	27,383



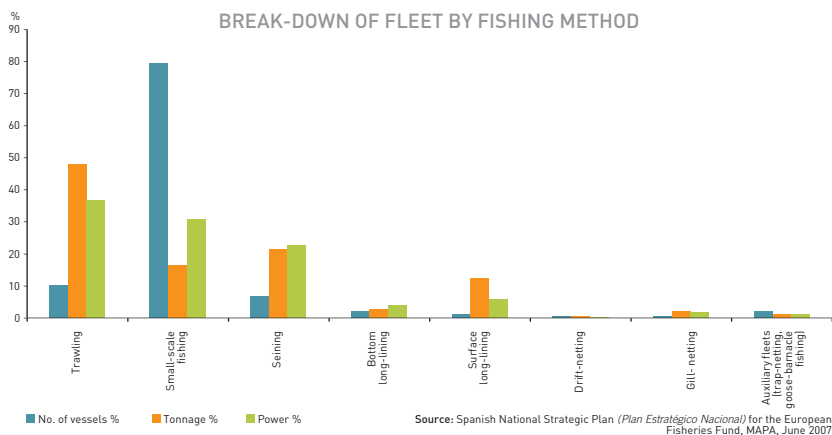
Source: Secretariat General for Marine Fisheries (Secretaría General de Pesca Marítima), Spanish Ministry of Agriculture, Fisheries and Food (MAPA - Ministerio de Agricultura, Pesca y Alimentación)

FISHING FLEET POWER (December 2006)

ALL FISHING GROUNDS	
Auton. Comm.	Tonnage (GT)
Andalusia	174,858
Asturias	29,384
Balearic Islands	23,390
Canary Islands	71,874
Cantabria	26,846
Catalonia	124,163
Ceuta	16,764
Galicia	359,198
Melilla	1,151
Murcia	17,005
Basque Country	149,717
Valencia	99,371



Source: Secretariat General for Marine Fisheries, MAPA



It is important to take into account the composition of the fleet. According to the Statistical Register of Fishing Vessels (*Censo de la Flota Pesquera Operativa*), in December 2005, 78.63% of vessels in the Spanish fleet were classified as “small-scale” and as operating in adjacent waters. However, these vessels represented just 15.86% of fleet tonnage and 30.71% of fleet power. Bottom-trawling vessels, on the other hand, represented 9.86% of the total number, but 46.55% of fleet tonnage and 36.84% of fleet power.

**NOTES**

- This indicator refers to vessels on List 3 of the General Vessel Register (*Lista 3ª del Registro General de Buques*) included in 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 examined. A significant number of vessels are of traditional type and some do not even have a built-in engine.
- In calculating the indicator, in accordance with Council Regulation (EC) 2371/2002, fishing capacity is stated in terms of power, measured in kilowatts (kW), and load capacity (tonnage), measured in gross tonnes (GT). This unit replaced GRT (gross registered tonnage) in 1998.

**SOURCES**

- Data provided by the Secretariat General for Marine Fisheries. Spanish Ministry of Agriculture, Fisheries and Food (MAPA).
- EU figures from the Eurostat website (<http://epp.eurostat.ec.europa.eu>), "Data", "fishing fleet".

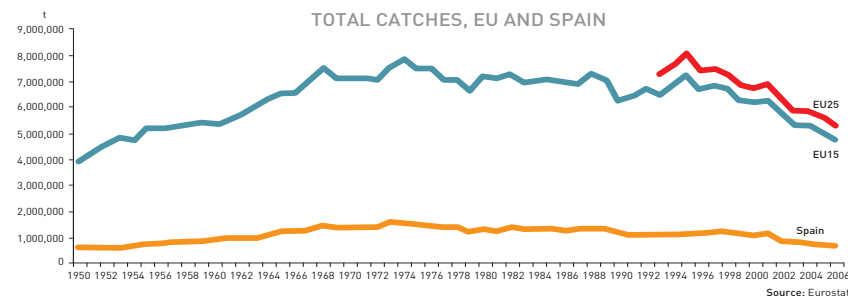
**FURTHER INFORMATION**

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

## Fishing fleet catches

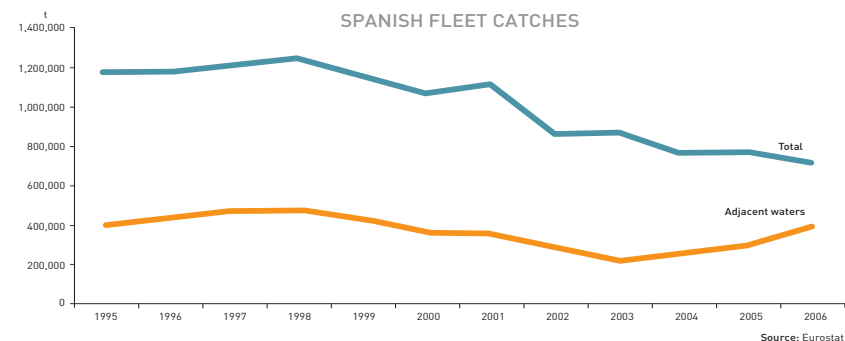
The total Spanish catch has dropped to the level of 50 years ago, although there is a rise in catches in adjacent waters

Following application of the Common Fisheries Policy, the Spanish fleet's total catch has returned to a level similar to that recorded almost 50 years ago. This is in keeping with changes in the catch made by all EU countries.

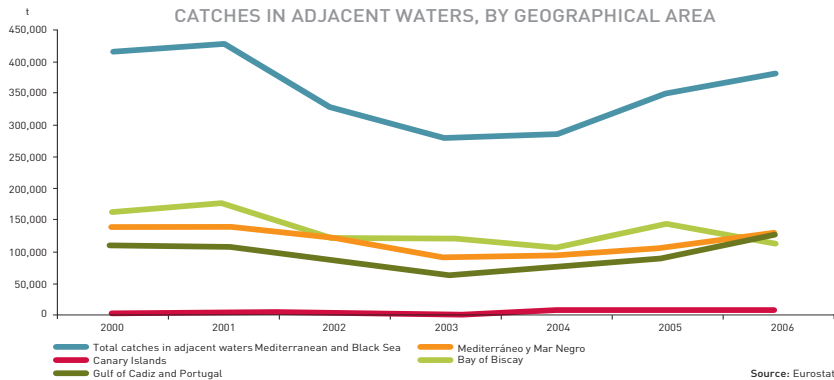


Over the last two years, there has been a drop in the Spanish fleet's total catch, although there has been a rise in catches in adjacent waters closer to the Spanish coastline (in particular in 2006), where small vessels can operate. Catches have increased in the Mediterranean fishing grounds.

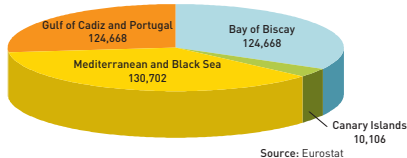
As in previous editions, catches in adjacent waters (areas of the Bay of Biscay, Gulf of Cadiz, Canary Islands and Mediterranean) are shown here, comparing changes in these catches with trends in the total catch by the Spanish fishing fleet. The total catch in 2006 stood at 92% of that made in 2004. However, catches in adjacent waters in 2006



represented 153% of that recorded in 2004, with a particularly pronounced increase in the waters of the Mediterranean, the Gulf of Cadiz and Portugal.



CATCHES IN ADJACENT WATERS, BY GEOGRAPHICAL AREA, 2006 (t)



**NOTES**

• One of the fishing-related initiatives carried out by the Spanish Ministry of the Environment (MMA - *Ministerio de Medio Ambiente*), in close collaboration with the Ministry of Agriculture, Fisheries and Food (MAPA), is the proposal to create Spain's first Marine Protected Area around the underwater mountain known as El Cachucho. This area of great ecological value is situated 65 kilometres off the coast of Ribadesella in Asturias. The new Natural Heritage and Biodiversity Act (*Ley de Patrimonio Natural y Biodiversidad*), which was passed in 2007, envisages creation of a Network of Marine Protected Areas (*Red de Áreas Marinas Protegidas*). Almost 600 species have been found around El Cachucho, two of which are new. It is a highly vulnerable ecosystem that is important to reproduction of many fish species. Its base is home to cold-water coral reefs, sponges and sea fans. Sperm whales and other cetaceans inhabit its waters. Protection of this area may have a small impact on the fishing sector, but the reserve effect resulting from this protection would facilitate recovery of the fishing ground and fishery resources in the surrounding area.

**SOURCES**

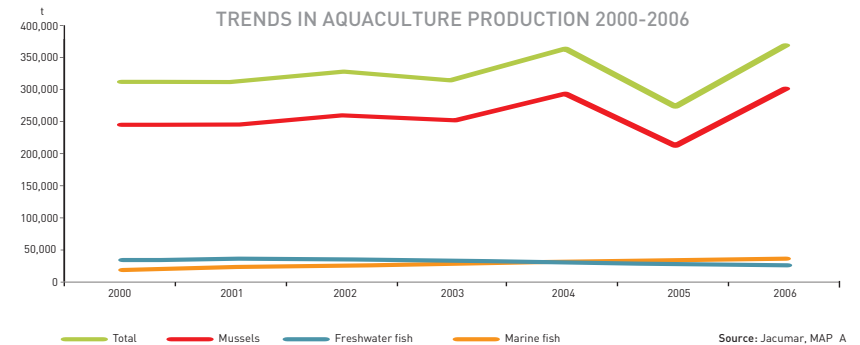
• EUROSTAT, Data, Fisheries. The data used for the Mediterranean, Bay of Biscay-North-West, Gulf of Cadiz and Canary Islands, respectively, are the EUROSTAT figures for the "Mediterranean and Black Sea", "North-East Atlantic, zone R27-08 c", "North-East Atlantic, zone R27-09a", and "Central Eastern Atlantic, zone 34.1.2" regions.

**FURTHER INFORMATION**

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

## Aquaculture production

Spain's aquaculture industry is steadily providing an ever-greater alternative source of fish



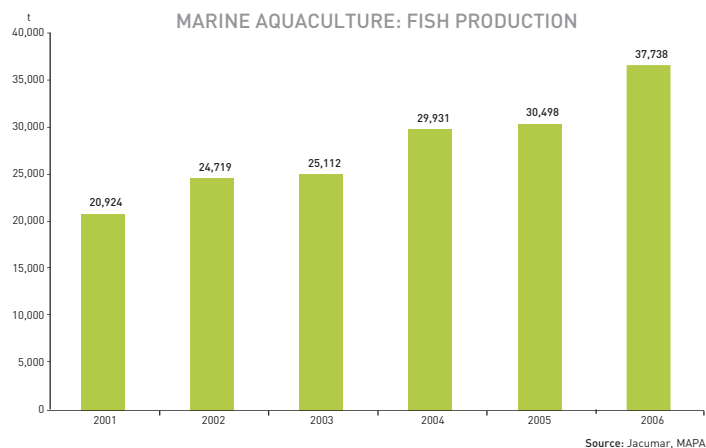
In 2006, Spanish aquaculture reached its highest level ever in terms of both production and economic value, which points to favourable prospects for the sector. Despite the fact that overall production still depends to a large extent on trends in mussel farming (which represents over 80% of total output and 30% of economic value), new species with good market prospects are being introduced each year, making it possible to diversify production and offer consumers new products.

In 2006, 301,865.86 tonnes of mussels were produced, an increase of almost 40% on the 209,000 tonnes produced in 2005.

Mention must be made of the excellent figures recorded in recent years for marine fish, primarily gilt-head sea-bream (17,836 tonnes), European sea-bass (9,438 tonnes), turbot (6,214 tonnes) and tuna (2,938 tonnes), which are now established farmed species steadily undergoing continuous growth, having increased from almost 30,000 tonnes in 2004 to 38,000 tonnes in 2006. New species include meagre, which has undergone spectacular growth of more than 150% in the last year, making it the fifth- biggest species in terms of production.

Trout must also be mentioned, as it is a traditional farmed fish that is widely consumed in Spain. In recent years, a stable level of trout production has been achieved to meet consumer demand.

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



Marine aquaculture facilities can be found along the entire Spanish coastline from the Mediterranean to the Atlantic and Bay of Biscay. In 2005, there were 5,206 marine aquaculture establishments, including mussel platforms, fish farms and marine facilities, and 230 inland aquaculture facilities. At that time, the industry employed 22,741 people, 1,000 of who worked in inland aquaculture. The economic value of aquaculture production in 2006 was estimated at 466 million.

#### SOURCES

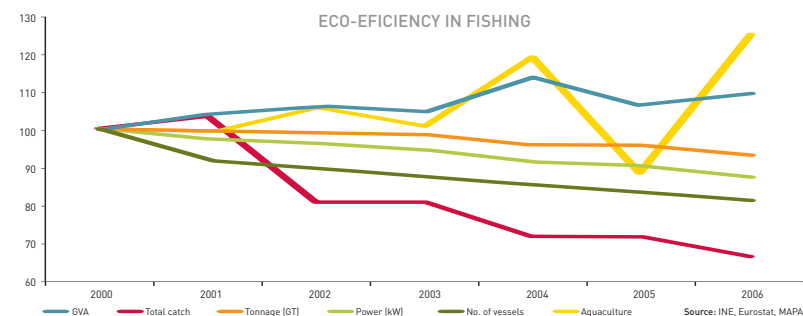
- JACUMAR, Spanish National Advisory Board for Marine Aquaculture (*Junta Nacional Asesora de Cultivos Marinos*). Spanish Ministry of Agriculture, Fisheries and Food (MAPA).

#### FURTHER INFORMATION

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

## Eco-efficiency in the fishing and aquaculture sectors

The general trend in the sector is towards a fall in capacity and catches whilst aquaculture production fluctuates



The Spanish fishing fleet's number of vessels and power continue to fall in line with the general trend seen in other European countries. In Spain's case, there has been a slightly sharper drop in the number of vessels than in fleet power and tonnage. There has been an even greater decrease in total catch, with certain fluctuations among fishing grounds.

Fluctuations have also been observed in Gross Value Added, which shows growth that can be attributed to greater efficiency and modernisation in the sector. However, there have also been significant variations from one year to another as a result of changes in mussel production, which has led to peaks in aquaculture and has affected the sector's overall figures. Nevertheless, the general trend shows a continuous decrease in fishing capacity and catches made by the Spanish fleet. This trend is not applicable to fish production in marine aquaculture facilities, in which output continues to rise each year.

#### NOTES

- GVA: Gross Value Added for the sector has been calculated using the chained volume indices of Gross Value Added at basic prices (reference year 2000=100), based on data provided by the Spanish National Institute of Statistics (*Instituto Nacional de Estadística*).

#### SOURCES

- GVA: Spanish National Accounts (*Contabilidad Nacional de España*). Spanish National Institute of Statistics.
- No. of vessels, power and tonnage: Secretariat General for Marine Fisheries. Spanish Ministry of Agriculture, Fisheries and Food (MAPA).
- Catches: Eurostat, Data, Fisheries.
- Marine aquaculture: Secretariat General for Marine Fisheries. Spanish Ministry of Agriculture, Fisheries and Food (MAPA).

#### FURTHER INFORMATION

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