
2.9

FISHING



European fisheries policy aims to achieve a balance between the fleets' capacity and fishing opportunities so as to ensure fishery sustainability. Spain, as one of Europe's largest fishing powers, plays its part in these efforts. In April 2006, the European Commission brought together several elements of the Common Fisheries Policy (CFP) under a single reformed framework. The aims of this reform are to achieve sustainable fishing through long-term management, striking a better and more lasting balance between fishing and existing marine resources, involving the parties committed to the CFP process, increasing efficiency and uniformity in the application of fishing regulations and combating illegal fishing in both EU waters and beyond.

According to Eurostat figures, the fishing fleet of the EU15 dropped from 85,480 vessels in 2004 to 83,677 in 2005, one notable feature being that 20.3% of this fall came from reductions in the Spanish fleet.

The analysis differentiates between total catches and catches in adjacent waters, which are understood to be catches made in marine ecosystems within 200 miles of the Spanish coastline (Bay of Biscay-North-West, Gulf of Cadiz, Canary Islands and Mediterranean).



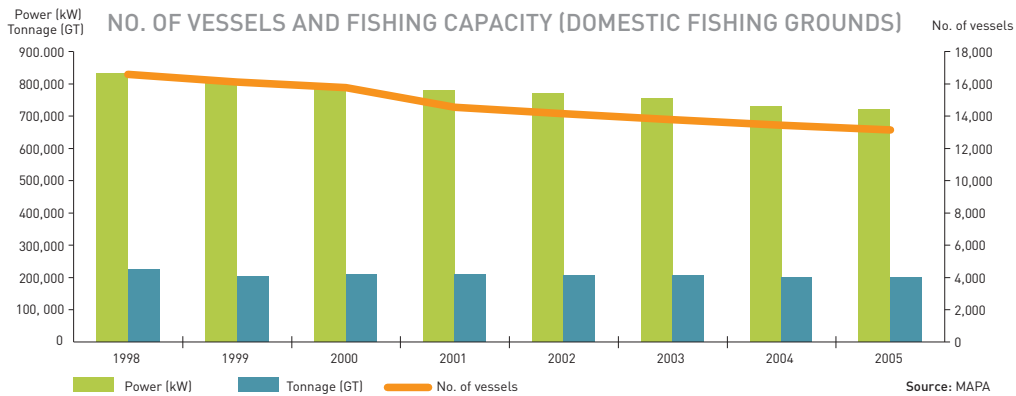
Catches in waters adjacent to Spain rose in 2004 by only 7,732 tonnes, while the total catches for the same year fell by 42,903 tonnes.

There was a sharp drop in marine aquaculture in 2004 as a result of reduced mussel production (which makes up the bulk of output), although fish production continued to increase.

INDICATOR	GOAL	TREND
Number of vessels and fishing fleet capacity	Adjust fishing capacity to sustainable limits	Spain's fishing fleet continues to decrease in terms of number of vessels and capacity
Fishing fleet catches	Contribute to food security and facilitate fishing grounds' recovery	Overall catches falling
Marine aquaculture production	Increase and diversify production	Mussel production falling, fish production rising
Eco-efficiency in the fishing and marine aquaculture sectors	Sustainable exploitation of resources	GVA rising while catches and fleet capacity fall

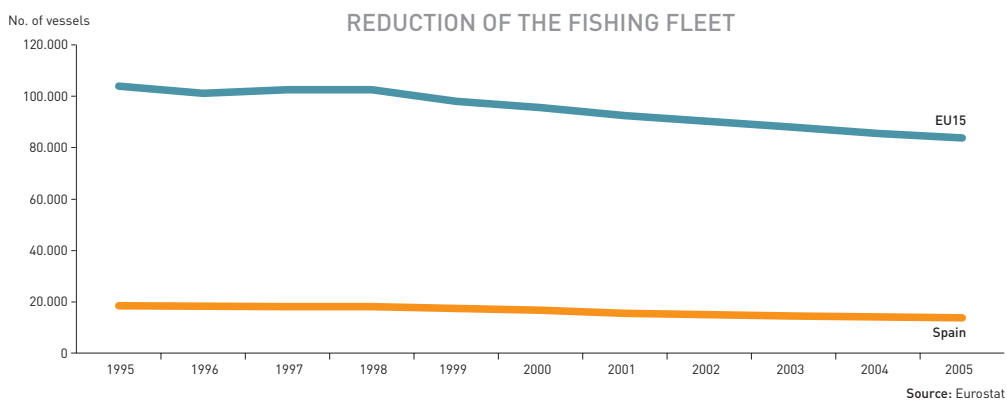
Number of vessels and fishing fleet capacity

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



The number of vessels in the Spanish fishing fleet operating in all fishing grounds fell from 14,071 on 31 December 2004 to 13,694 on 31 December 2005. The overall tonnage and power of the fleet also declined over the year.

Neither the Spanish nor the European fishing industry can grow unless a balance is achieved between the volume of fish caught and fisheries' biological state. A whole range of important commercial species have been at grave risk of exhaustion in recent years within European waters.

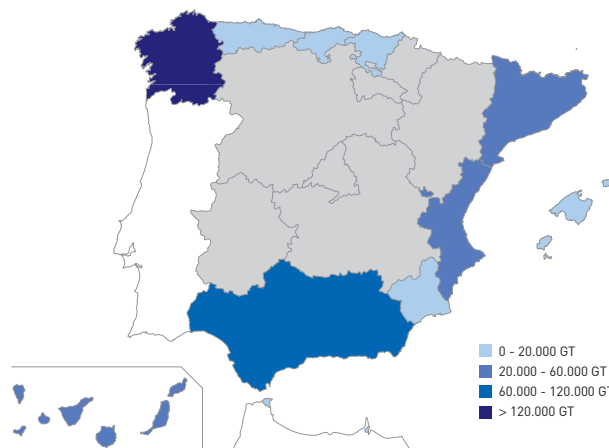


Over the period 1995-2005, Europe’s fishing fleet shrank by 19.4%, while the Spanish fleet was reduced by 25.5%.

The major objectives established for the fishing industry in general are: elimination of excess capacity and over-fishing; re-establishment of exhausted populations; protection of associated and dependent species; and achieving a balance between ecosystems’ state and increased production.

FISHING FLEET TONNAGE (March 2005)

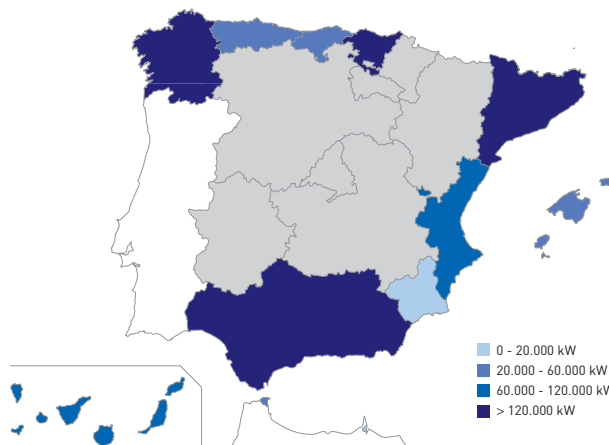
ALL FISHING GROUNDS	
Autonomous Community	Tonnage (GT)
Andalusia	64,754
Asturias	7,570
Balearic Islands	3,916
Canary Islands	36,953
Cantabria	11,643
Catalonia	27,177
Ceuta	10,066
Galicia	204,466
Melilla	296
Murcia	4,226
Basque Country	17,896
Valencia	27,917



Source: Secretariat General for Marine Fisheries, MAPA.

FISHING FLEET POWER (March 2005)

ALL FISHING GROUNDS	
Autonomous Community	Power (kW)
Andalusia	184,129
Asturias	30,827
Balearic Islands	24,091
Canary Islands	76,003
Cantabria	28,347
Catalonia	128,905
Ceuta	23,790
Galicia	377,331
Melilla	998
Murcia	17,130
Basque Country	150,679
Valencia	104,735



Source: Secretariat General for Marine Fisheries, MAPA.

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NOTES

- This indicator refers to vessels on List 3 of the General Vessel Register (*Lista 3ª del Registro General de Buques*), which make up the Statistical Register of Fishing Vessels (*Censo de Flota Pesquera Operativa*) in service on 31 December each year. The inshore fishing fleet, made up of vessels fishing adjacent waters, is the most numerically significant and represents 86% of the overall Spanish fishing fleet. These vessels operate in four distinct coastal areas (Bay of Biscay-North-West, Gulf of Cadiz, Canary Islands and Mediterranean) and are entered on Registers that permit them to fish in defined areas using specific methods or equipment. Over the course of the year, some of these vessels 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

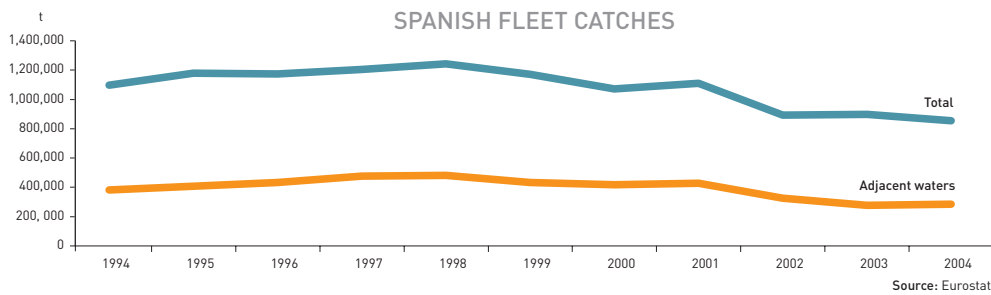
- Data provided by the Secretariat General for Marine Fisheries (*Secretaría General de Pesca Marítima*). Spanish Ministry of Agriculture, Fisheries and Food (Ministerio de Agricultura, Pesca y Alimentación).
- EU figures from Eurostat website (<http://epp.eurostat.ec.europa.eu>), "Data", "fishing fleet".

FURTHER INFORMATION

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

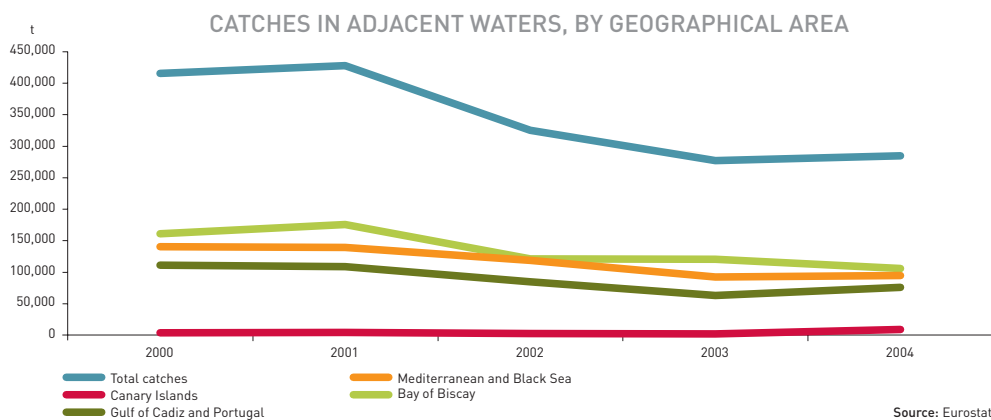
Fishing fleet catches

The decline in catches is sharpest in waters close to the Spanish coast

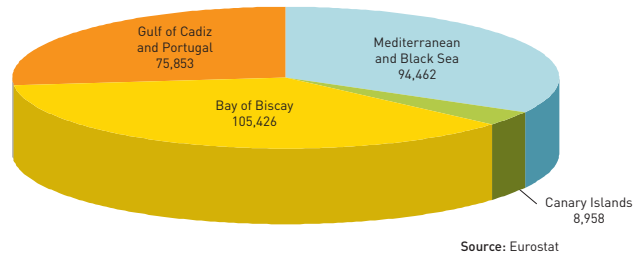


This indicator shows the changes in catches made by the Spanish fleet in adjacent waters (Bay of Biscay, Gulf of Cadiz, Canary Islands and Mediterranean) together with overall catches. Compared with 2003, the Spanish fleet's total catches in 2004 fell by 42,903 tonnes, whilst the catches in adjacent waters increased by 7,732 tonnes. Over the ten-year period 1994-2004, the Spanish fleet's total catches fell by 22.07%.

During the same period, catches in adjacent waters fell by 25.26%. The decline in catches is sharper in waters close to the Spanish coast than in more remote fishing grounds. This inevitably has implications for the large part of the national fleet made up of smaller vessels.



CATCHES IN ADJACENT WATERS, BY FISHERY, 2004 (t)

**NOTES**

- The story of anchovy fishing in the Bay of Biscay over recent years is particularly relevant to the current situation. The anchovy is a short-lived species (around three years). The report by the Scientific, Technical and Economic Committee for Fisheries (STECF, the European Commission's consultative group) recommended that all fishing be stopped, having established that the anchovy population was far below safe biological levels, and that the number of young specimens among the population was far lower in 2005 than ever recorded before. A temporary ban was placed on anchovy fishing in July 2005, which above all affected the Spanish and French fleets. In July 2006, the STECF again recommended a ban on fishing until at least December 2006. In the opinion of the STECF, the stock of adult anchovies in the Bay of Biscay during the spring spawning season should not drop below 28,000 tonnes. The Committee estimated that in spring 2006 the biomass stood at 18,640 tonnes, well below safe biological levels.
- The eel was another species found to be in a critical situation. In October 2005, the European Commission indicated that Member States needed to establish national plans to ensure that 40% of adult eels could, in the absence of fishing and the effects of other human activities, migrate from rivers to the sea in order to spawn. The percentage of young specimens had fallen to levels as low as 1% of those seen in the past. Eels spawn in the Sargasso Sea, in the Atlantic Ocean. The larvae migrate to river estuaries throughout Europe and North Africa and swim upstream, where they spend most of their life. The older eels begin a new downstream migration and cross the Atlantic to spawn and die. The preservation of this species requires both river management measures and limits placed on estuary fishing for fish farming. The national plans requested by the European Commission should come into force in July 2007. Meanwhile, the Commission has established a ban on eel fishing between the 1st and 15th of each month.

SOURCES

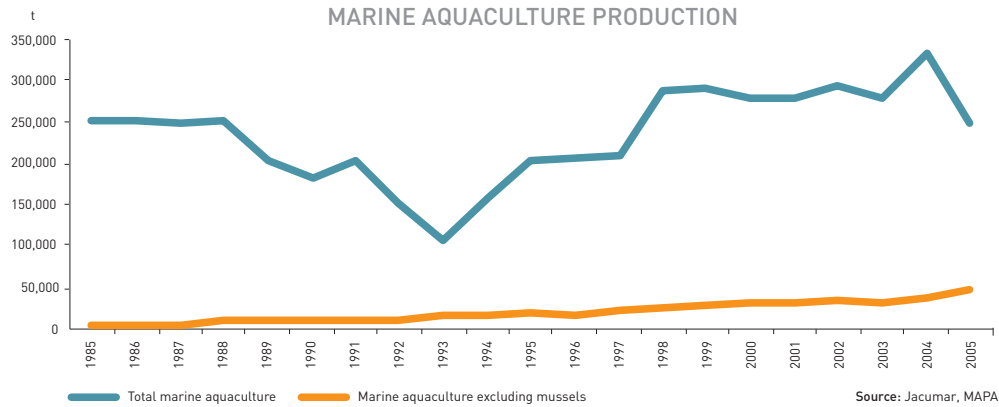
- EUROSTAT, Data, Fisheries. The data used for the Mediterranean, Bay of Biscay-North-West, Gulf of Cadiz and Canary Islands, respectively, are the EUROSTAT figures for the "Mediterranean and Black Sea", "North-East Atlantic, zone R27-08", "North-East Atlantic, zone R27-09a", and "Central Eastern Atlantic, zone 34.1.2" regions.
- No figures are available for 1994 and 1995 for the Canary Islands.

FURTHER INFORMATION

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

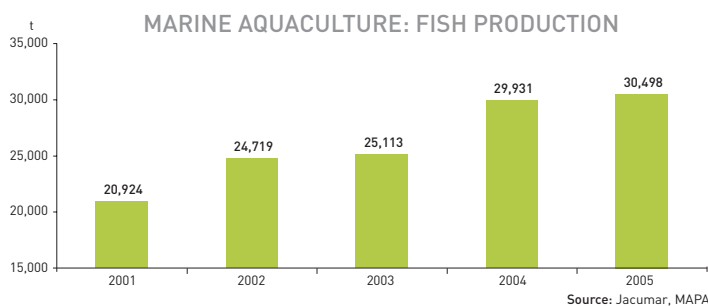
Marine aquaculture production

Aquaculture presents new challenges for the marine environment



Spain is one of the European Union's leading consumers of fish. Falling catches in traditional fishing grounds have led to the exploitation of new fishing grounds further afield and a rise in fish imports. For some years aquaculture has constituted an alternative source of fish. Revenue and employment within the industry have risen significantly and dependence on imports has been reduced.

The general trend reveals fluctuations caused mainly by mussel production, which makes up around 85% of all marine aquaculture output. In 2005, for instance, mussel production fell by 85,511 tonnes compared to 2004. There were also downturns in production of other molluscs (clams, oysters, cockles) and crustaceans. The upward trend continued in 2005, however, in fish production, in particular in that of gilthead seabream (14,180 tonnes), turbot (5,511 tonnes) and European sea bass (6,208 tonnes). The total figure for marine aquaculture fish production in 2005 stood at 30,498 tonnes.



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Aquaculture increases the variety of fish and seafood products available without placing further pressure on natural populations. It requires the application of very clear environmental principles and standards, since it can otherwise have an environmental impact, meaning that careful management of aquaculture facilities must be a priority for all authorities responsible for the development of this sector.

The Secretariat General for Marine Fisheries (*Secretaria General de Pesca Marítima*) has set up a number of studies, under the aegis of the Spanish National Advisory Board for Marine Aquaculture, to analyse the possible environmental impact of fish farm cages. It is also working on operational protocols to identify the most appropriate areas for such fish farm cages and determine the environmental management issues involved.

SOURCES

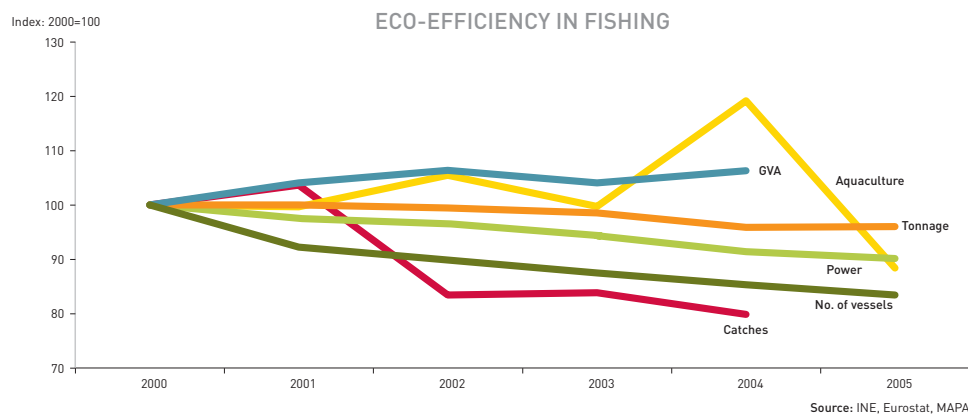
- JACUMAR, Spanish National Advisory Board for Marine Aquaculture (*Junta Nacional Asesora de Cultivos Marinos*). Spanish Ministry of Agriculture, Fisheries and Food (*Ministerio de Agricultura, Pesca y Alimentación*).

FURTHER INFORMATION

- www.mapa.es

Eco-efficiency in the fishing and marine aquaculture sectors

GVA is rising in the sector, despite reductions in fleet capacity and catches



In general, the fall in the number of vessels, power and capacity of the Spanish fishing fleet has been accompanied by a greater fall in catches, although slight fluctuations continue to occur. Modernisation is also reducing the size of the fleet whilst generating a moderate increase in the fishing sector's Gross Value Added (at current prices).

Aquaculture experiences major fluctuations, driven largely by mussel production, which makes up around 80% of overall marine aquaculture output. Despite these fluctuations, however, there is an underlying upward trend in fish production, in particular in that of gilthead seabream, European sea bass and turbot.

Therefore, despite pressure on species and ecosystems, the fishing sector reveals favourable economic efficiency, since the increase in GVA has gone hand-in-hand with a reduction in power, tonnage and, above all, catches. Nonetheless, the increasing development of aquaculture (despite the downturn in 2005) is playing a particularly significant role in the sector's economic growth.

SOURCES

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

FURTHER INFORMATION

- www.mapa.es
- www.ine.es