
2.11

FISHING



The European Union's Common Fisheries Policy (CFP), which has been in place for many years, establishes the fishing opportunities and regulations necessary to ensure that fishing remains sustainable and does not harm the marine environment. The CFP seeks to meet the goal set at the World Summit on Sustainable Development of ensuring that by 2015 fish stocks are not exploited beyond their maximum sustainable yield. In its 2011 report, the Scientific, Technical and Economic Committee for Fisheries (STECF) highlighted the deficient state of many fishery resources in EU waters. According to the Committee, only 40% of fish stocks studied were fished in a sustainable way. In October 2010, the European Commission proposed not to increase fishing opportunities for deep-sea fish stocks in European and north-east Atlantic waters.

In Spain, the Sustainable Fisheries Bill, which will replace Law 3/2001 on marine fisheries, is in the final stages of its passage through Parliament. It aims to ensure rational, responsible and sustainable exploitation of fishery resources and includes all of the *acquis communautaire* related to the CFP. Since Law 3/2001 was passed, various pieces of Community legislation have been adopted in an effort to guarantee that marine living resources are exploited in an economically, environmentally and socially sustainable way. This includes implementation of the new Community regime

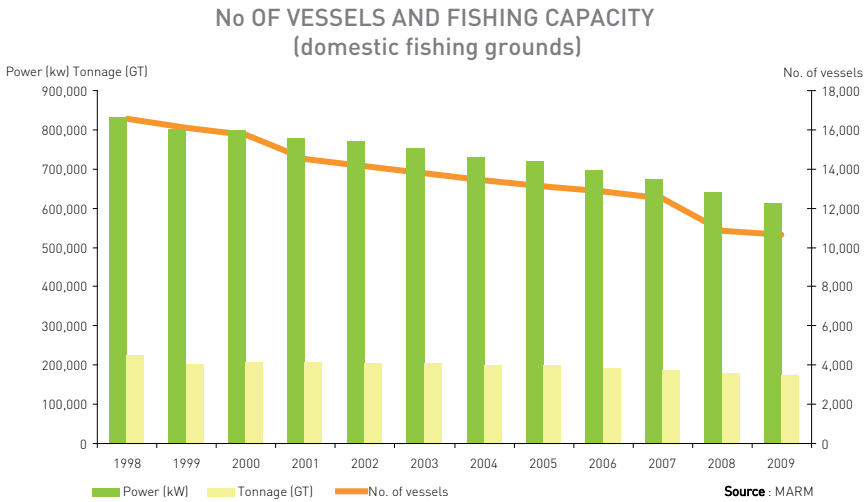


to combat illegal and unreported fishing, and the CFP's new control regime. The law also adapts fishing legislation to the Marine Strategy Framework Directive. This bill will regulate recreational fishing, fishing tourism, removal of marine flora and access to the marine environment's genetic resources. It promotes oceanographic and fishery research and the study of genetic resources and seeks to apply their findings when determining fish stock productivity. It will also regulate aquaculture, considering it a complementary economic activity to sea fishing. One of its main new features is that it will create a national fishing reserve, which will improve control of fishing and favour its management.

INDICATOR	GOAL	TREND
Number of vessels and fishing fleet capacity	Keep fishing capacity within sustainable limits	The Spanish fishing fleet continues to shrink in terms of number of vessels, power and tonnage
Fishing fleet catches	Contribute to food security and facilitate fishery recovery	Overall Spanish fishing fleet catches are falling
Aquaculture production	Increase and diversify production	Mussel and fish production in marine aquaculture are increasing
Eco-efficiency in fishing and aquaculture	Achieve sustainable resource exploitation	In 2010, the sector's GVA and aquaculture production increased, while fleet catches and capacity decreased

Number of vessels and fishing fleet capacity

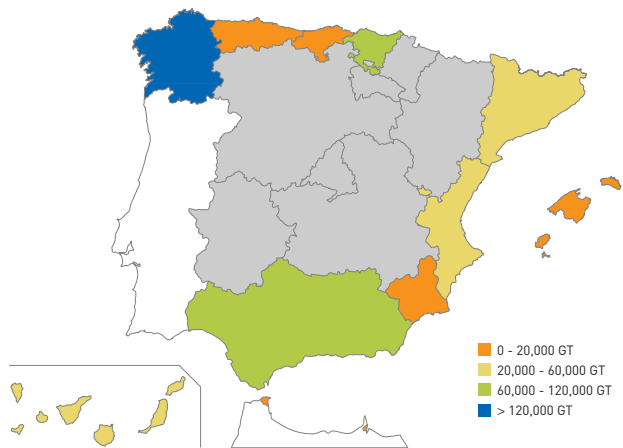
The Spanish fishing fleet continues to shrink



On 31 December 2009, the number of vessels in the Spanish fishing fleet stood at 11,116, a drop of 2.4% on the 11,394 registered on 31 December 2008. Of the vessels that made up the fleet on 31 December 2009, a total of 10,625 operated in Spanish fishing grounds.

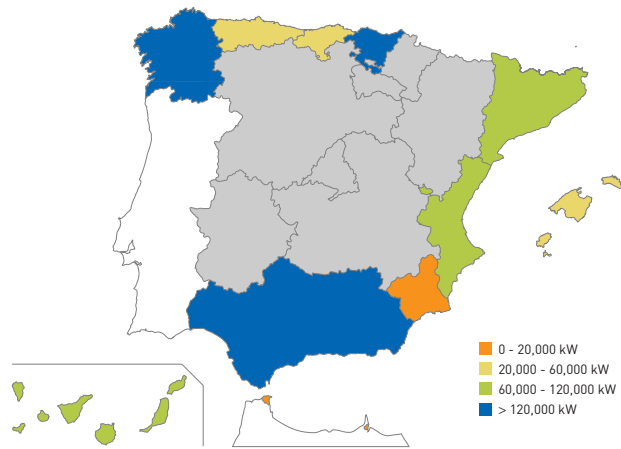
FISHING FLEET TONNAGE AS AT 31 DECEMBER 2009 (all fishing grounds)

ALL FISHING GROUND	
AC	Tonnage (gt)
Andalusia	55,474
Asturias	10,415
Balearic Islands	3,896
Canary Islands	30,112
Cantabria	10,758
Catalonia	25,459
Ceuta	13,981
Galicia	194,750
Melilla	210
Murcia	3,667
Basque Country	84,916
Valencia	24,415



FISHING FLEET POWER AS AT 31 DECEMBER 2009 (all fishing grounds)

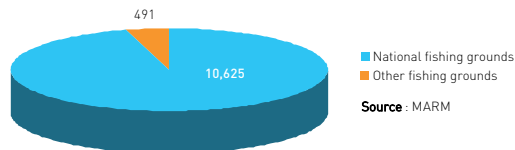
ALL FISHING GROUND	
AC	Power (kW)
Andalusia	159,427
Asturias	26,135
Balearic Islands	22,550
Canary Islands	66,338
Cantabria	25,427
Catalonia	114,974
Ceuta	19,297
Galicia	343,688
Melilla	544
Murcia	13,928
Basque Country	143,457
Valencia	87,089



Source: Secretariat-General for the Sea, MARM

Between 1998 and 2009, the number of vessels in the Spanish fishing fleet decreased by 35.8%, tonnage (gt) dropped by 22.8%, and power (kW) by 26.2%. In general, this was above the average decrease in the European fishing fleet in the same period. By autonomous community, Galicia still has the largest fishing fleet in terms of both tonnage and power.

SPANISH FISHING FLEET DISTRIBUTION BY FISHING GROUND (31 December 2009)



Source: MARM

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

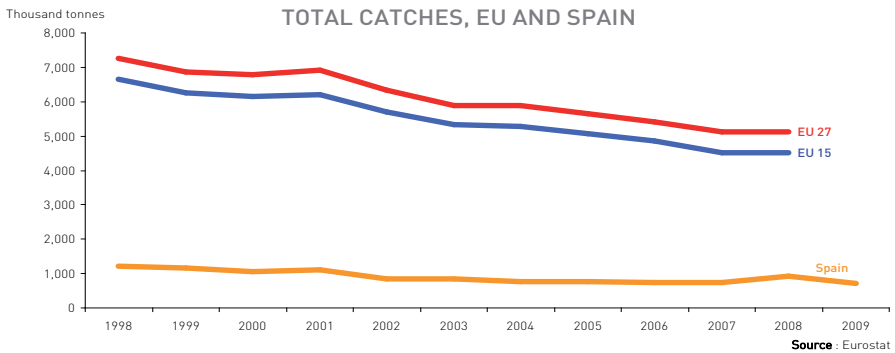
- Data provided by the Secretariat-General for the Sea. MARM.
- EU data from the Eurostat website (<http://epp.eurostat.ec.europa.eu>), "Data", "Fishing fleet".

FURTHER INFORMATION

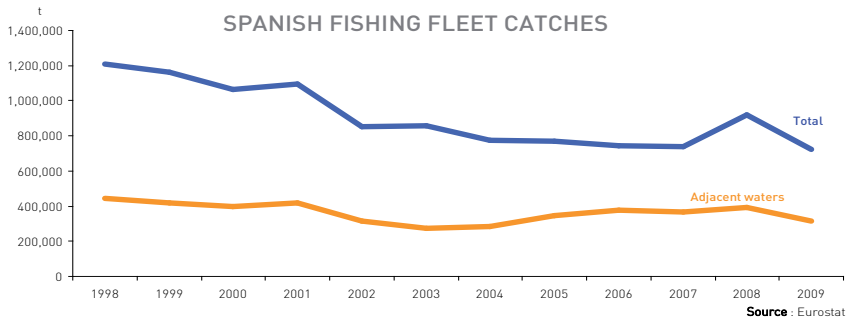
- <http://www.marm.es>
- <http://epp.eurostat.ec.europa.eu/>

Fishing fleet catches

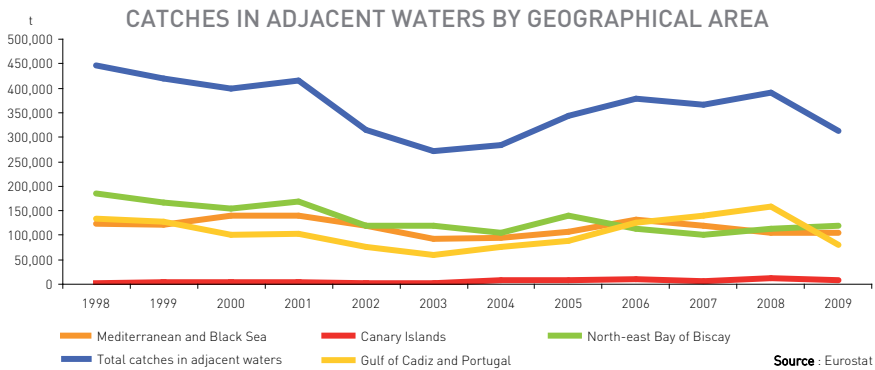
The total catch landed by the Spanish fleet in 2009 was 21.5% lower than in 2008



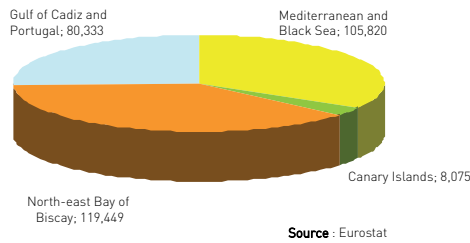
According to Eurostat figures, the Spanish fleet's catches in 2009 were 21.5% lower than the year before. Catches fell from 918,705 tonnes in 2008 to 721,080 tonnes in 2009. As in previous years, these Eurostat figures indicate the equivalent live weight landed and do not include products that, for various reasons, are not landed.



Catches in the Mediterranean Sea in 2009 remained stable in comparison with the previous year, while in the Bay of Biscay they increased by 5.4%. However, catches fell sharply in the Canary Islands and in the Gulf of Cadiz. Total catches by the Spanish fishing fleet in adjacent waters dropped by 19.6% in 2009 on the year before, falling from 390,284 to 313,677 tonnes.



CATCHES IN ADJACENT WATERS BY GEOGRAPHICAL AREA (t) (2009)



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

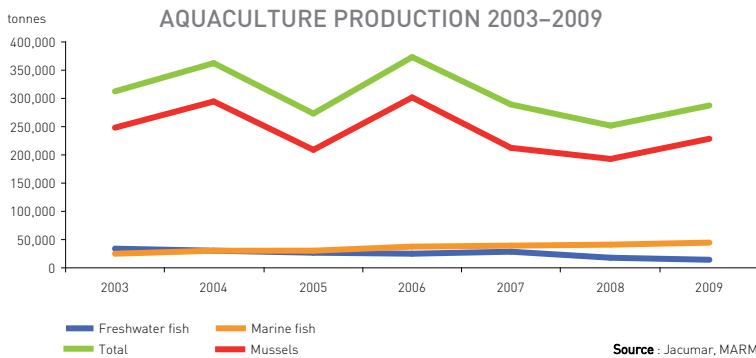
- Eurostat: “Data”, “Fisheries”.

FURTHER INFORMATION

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

Aquaculture production

Mussel and fish production in marine aquaculture are increasing

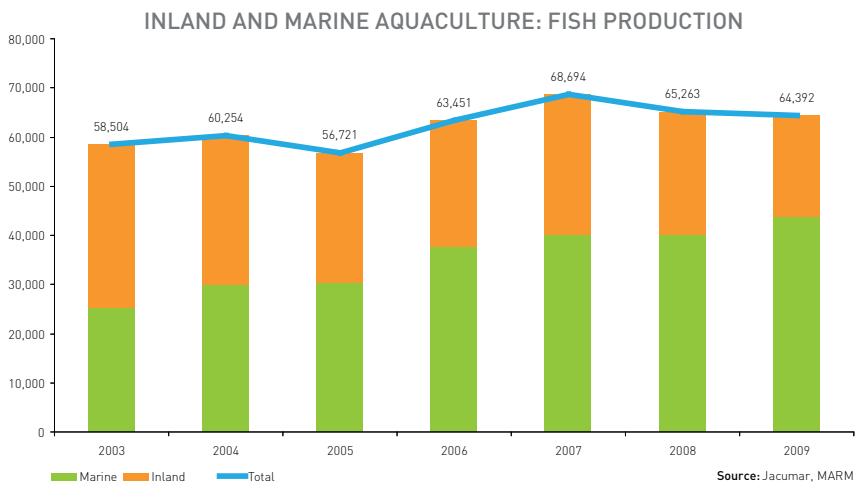


Faced with growing worldwide demand for fish and the state of some fishing grounds, both marine and inland aquaculture are emerging as alternative means of meeting this demand. According to a study by the FAO, aquaculture now accounts for 47% of aquatic food produced worldwide, and this percentage is predicted to continue rising. Aquaculture has already progressed from being a mainly family-run low-volume activity to a business producing high-value species on an industrial and commercial scale that makes a significant contribution to national economies.

In Spain, total aquaculture production in 2009 was 12.18% higher than the year before. Much of this increase is due to a rise in mussel production, which climbed from 192,859 tonnes in 2008 to 228,596 tonnes in 2009, an 18.5% increase.

Spanish aquaculture's fish production remained relatively stable, recording a 1.35% decrease in 2009 on 2008, a downturn due to a fall of around 17% in fish production in inland aquaculture (from 25,000 tonnes to 20,637 tonnes). This descent in freshwater fish production was partially compensated for by an increase in marine fish production, which rose from 40,263 tonnes in 2008 to 43,755 tonnes in 2009. These figures continued the downward trend in rainbow trout production (which decreased from 25,480 tonnes in 2006 to 20,435 tonnes in 2009) and the growth in production of European sea-bass (from 9,438 tonnes in 2006 to 11,548 tonnes in 2009) and gilt-head sea-bream (from 17,836 tonnes in 2006 to 21,319 tonnes in 2009). It is worth highlighting that several non-traditional species have become very well established in aquaculture in recent years, among them meagre, production of which shot up from 14 tonnes in 2004 to 1,088 tonnes in 2009.

According to data provided by the MARM's Sub-Directorate-General for Statistics, Spain's aquaculture industry now comprises 3,400 companies, which in turn operate 5,503 facilities. Of these, 95% are located in marine areas, while the remainder are located on inland waters. Shellfish, particularly mussels, account for the majority of production (79.5% of the total in 2009). In recent years, mussel production has fluctuated greatly as a result of red tides in Galicia. These variations have a notable effect on the total figures for Spanish aquaculture.



SOURCES

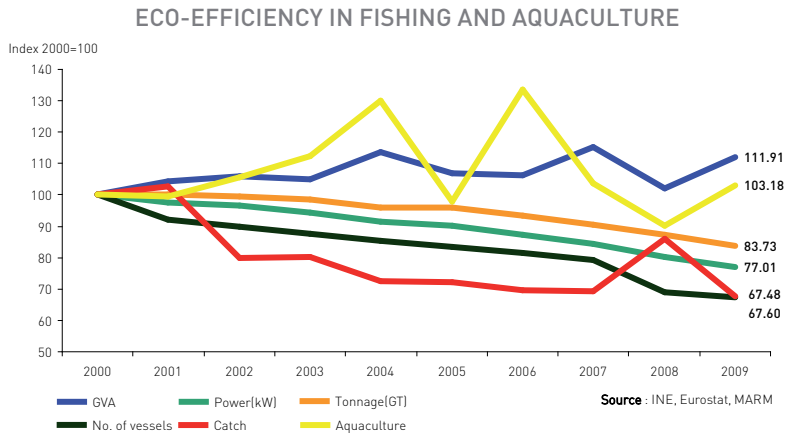
- JACUMAR. MARM.

FURTHER INFORMATION

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

Eco-efficiency in fishing and aquaculture

Fleet capacity and catches continue to decrease, while aquaculture production rises and the sector's GVA fluctuates



Gross value added at current prices increased by 9.5% in 2009, from €1,518 million in 2008 to €1,663 million in 2009. This rise occurred as fleet capacity decreased — power (kW) fell by 4.1%, tonnage by 4%, and the number of vessels by 2.3%, dropping from 10,869 vessels in 2008 to 10,625 in 2009. This is the lowest figure in recent years and, when combined with the decrease in power and tonnage, indicates that the Spanish fleet is following the Common Fisheries Policy's guidelines. Catches also decreased, in this case by 1.2%, while total aquaculture production grew by 14.3%.

As shown in the graph, over the last ten years the Spanish fishing fleet's power, tonnage and number of vessels have all decreased. Catches have also followed a downward trend, although with some fluctuations. Meanwhile, aquaculture production has varied significantly due to the effect on mussel production of red tides in Galicia. Gross value added (at current prices) shows a slightly upward trend, although it has fluctuated over the ten years analysed.

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/>