FISHING

2.12

Environmental Profile of Spain 2012

Spain maintains a close relationship with the sea and its natural resources, especially with fishing. Spain leads the EU in terms of fleet tonnage, volume and value of fish landed, number of fishers and aquaculture production.

Likewise, fishing is part of common EU policy, subject to continuous development that seeks conditions that will provide a better future not only for fish resources and fishing itself but also of the marine environment upon which it relies. The scope of policy application includes conservation and management as well as the exploitation of live aquatic resources and aquaculture, together with the transformation and commercialisation of fish and aquaculture products.

The reform of the Common Fisheries Policy (CFP) is aimed at solving the challenges faced by fishing in the EU.

On 13 July 2011, the European Commission presented its reform proposals for the CFP and, on 2 December of the same year, proposed a new fund for European maritime and fisheries policies during the period 2014-2020: the European Maritime and Fisheries Fund (EMFF). Sustainability is the core component of the proposed reform, and the aim is that the fishing sector is sustainable from an ecological, economic and social point of view. The reform is in favour of restoring sustainability to fish stocks and, therefore, to be

able to offer a stable, certain food supply, while at the same time dimensioning the fishing sector in order to end instability and the dependence on subsidies. This will create new employment opportunities and growth in coastal areas.

At the same time, the new CFP will promote the responsibility of the sector with respect to good management of the sea. In this sense, the Commission proposes that, by 2015, stocks are exploited at acceptable levels generating the maximum sustainable yield.

Aquaculture, being the farmed production of fish, shellfish and aquatic plants, as well as algae, is one of the fastest growing subsectors, and provides almost half the fish consumed on the planet. Nevertheless, in Europe, aquaculture only represents 20% of fish production. The development of aquaculture that is more competitive and ecological is a primary objective for the EU.

KEY MESSAGES

- The Spanish fishing fleet catch (in live weight) increased in 2011 by 11.9%, from 768,691 t in 2010 to 860,221 t caught in 2011.
- The total aquaculture production in Spain in 2011 experienced a year-on-year increase of 3.3%, reaching 291,235 t. This increase is mainly due to the recovery of mussel production, which in the most recent year grew by 0.5%.
- In 2011 the trend of a reduction in the capacity of the Spanish fishing fleet continued.

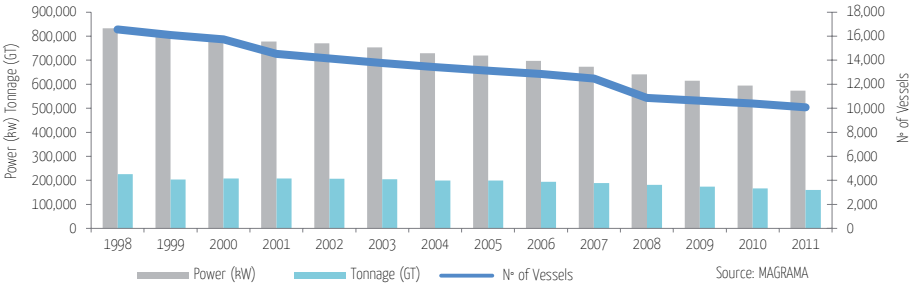
INDICATORS

- Number of vessels and fishing fleet capacity
- Fishing fleet catches
- Aquaculture production
- Environmental efficiency in fishing and aquaculture

Number of vessels and fishing fleet capacity

The trend of a reduction in the number of vessels and the capacity of the Spanish fishing fleet continues

Number of vessels and fishing fleet capacity (domestic fishing grounds)

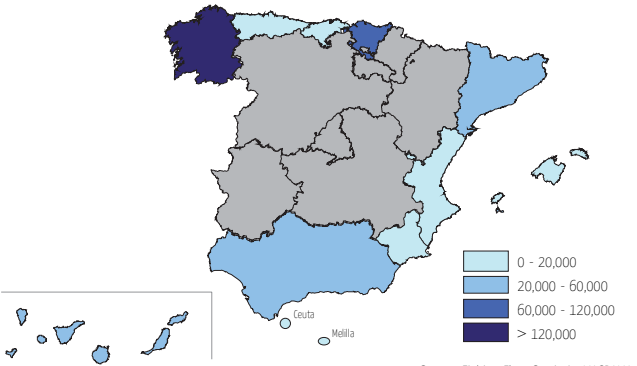


In 2011 the structural adjustment to Spain's fishing fleet continued, and, as in previous years there was a year-on-year decrease, of almost 3.1%, from 10,847 vessels in 2010 to 10,505 vessels in 2011. 96% of this fishing fleet (10,084 vessels) fished in Spain's domestic fishing grounds.

Analysing the evolution of the fishing fleet, through the number of vessels, tonnage and engine power, we can see how during the period 1998-2011 the Spanish fishing fleet has decreased in terms of the number of ships by 39.1%, tonnage by 29.2%, and engine power (kW) by 35.5%. By autonomous community, Galicia, the Basque Country and Andalusia had the largest fishing fleets.

Autonomous communities	Tonnage (GT)
Andalucía	47,473
Asturias	7,424
Baleares	3,780
Canarias	25,429
Cantabria	8,722
Cataluña	23,766
Ceuta	11,543
Galicia	167,657
Murcia	3,277
País Vasco	80,859
C. Valenciana	18,970

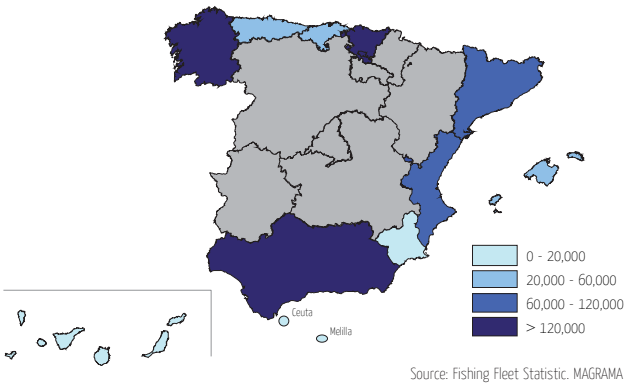
Tonnage of the fishing fleet. Year 2011 (GT)



Source: Fishing Fleet Statistic. MAGRAMA

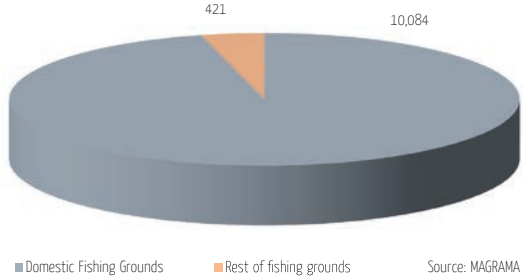
Autonomous communities	Power (kW)
Andalucía	137,874
Asturias	20,868
Baleares	21,633
Canarias	58,759
Cantabria	21,250
Cataluña	105,824
Ceuta	15,038
Galicia	304,453
Murcia	12,435
País Vasco	134,197
C. Valenciana	67,642

Fishing fleet power. Year 2011 (kW)



Source: Fishing Fleet Statistic. MAGRAMA

Number of vessels of the spanish fishing fleet per fishing grounds. Year 2011



Source: MAGRAMA

NOTES

- The 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 the 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 the 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 has replaced gross registered tonnage (GRT) since 1998.

SOURCES

- Data provided by:

-General Secretary for the Sea. Ministry of Agriculture, Food and Environment.
-Fishing Fleet Statistic. Ministry of Agriculture, Food and Environment.

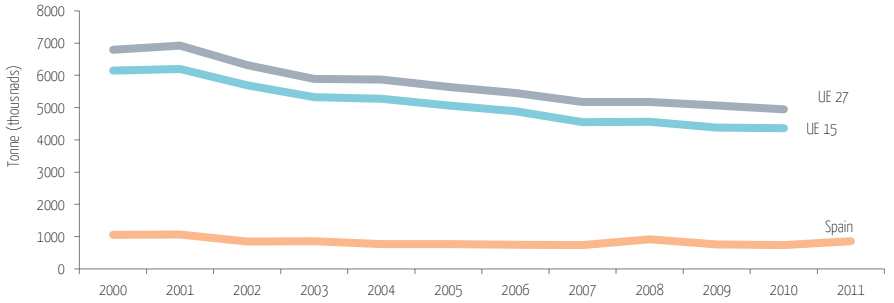
FURTHER INFORMATION

- http://www.magrama.es
- http://epp.eurostat.ec.europa.eu/

Fishing fleet catches

The total catch landed by the Spanish fishing fleet increased by 11.9% during the last year

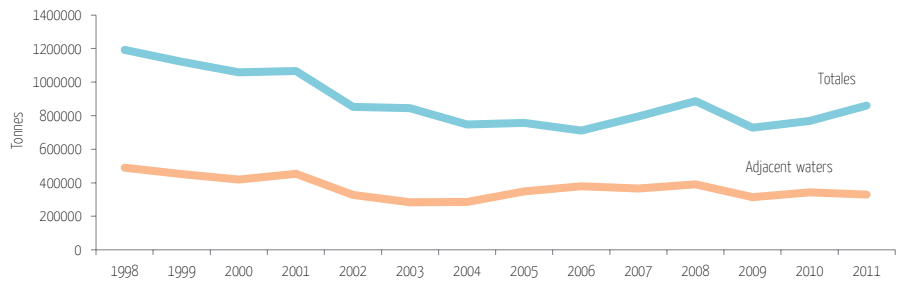
Total catches: Spain and EU



Source:E urostat. MAGRAMA

Fishing in Spain is an active sector that makes a major contribution to the national economy. The importance of this sector can be analysed through the Sea Fishing Catch and Landing Statistics, an annual report on the catches made in all fishing grounds and fishing areas where Spanish-flagged vessels carry out their activity. According to this report, in 2011, the total catches made (referring to live weight) increased by 11.9%, rising from 768,691 t in 2010 to reach 860,221 t caught in 2011.

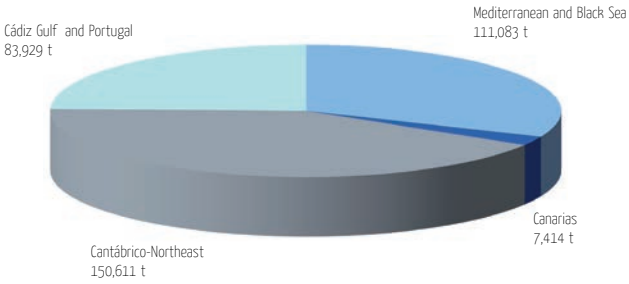
Catches of the spanish fishing fleet



Source: MAGRAMA

However, the analysis of the catches made in adjacent waters shows that during the most recent year there was a slight fall, specifically of 3.7%, from 342,182 t in 2010 to 329,472 t caught in 2011

Catches in adjacent waters per geographical areas, 2011



Source: MAGRAMA

The distribution of these catches in adjacent waters by geographical areas shows a similar behaviour, although to a different extent: all of them register lower catches than in the previous year. Total catches in the Bay of Biscay suffered the highest fall (8.7%): in 2011 the catches amounted to 137,546 t while in 2010 they were 150,611 t. A significant decrease in the volume of catches also occurred in the Mediterranean, with a decline of 6.8%, from 111,083 t in 2010 to 103,505 t in 2011.

To a lesser extent, the Gulf of Cadiz and Canary Islands have registered less significant decreases in their catches. In the Gulf of Cadiz there was a decline of 3.4%, from 83,929 t in 2010 to 81,088 t in 2011, while in the Canary Islands the reduction was 1.1%, that is, from 7,414 t in 2010 to 7,333 t in 2011.

NOTES

- The data used for the Mediterranean, Bay of Biscay-Northwest, Gulf of Cadiz and Canary Islands fishing grounds respectively, has been taken from the Eurostat figures for the 'Mediterranean and Black Sea', 'North-East Atlantic, Zone R27-08c', 'North-East Atlantic, zone R27-09a' and 'Central Eastern Atlantic, zone 34.1.2'.

SOURCES

- Sea Fishing Catch and Landing Statistics 1992-2011. MAGRAMA
- EUROSTAT, Data, Fisheries

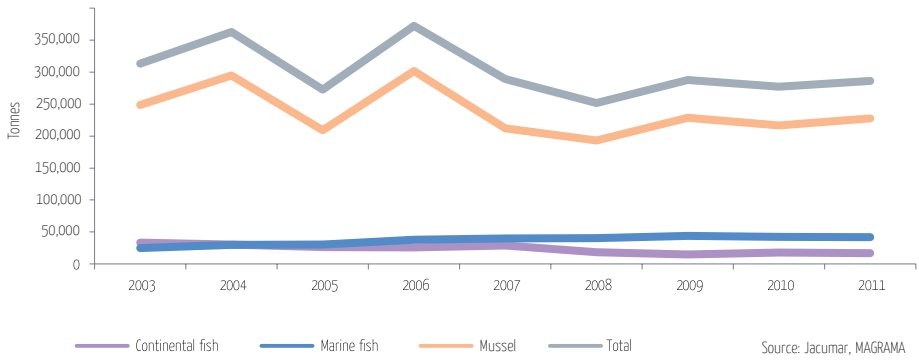
FURTHER INFORMATION

- www.magrama.es
- http://epp.eurostat.ec.eu.int/

Aquaculture production

Aquaculture production increased by 3.2% last year

Evolution of the aquaculture production 2003-2011



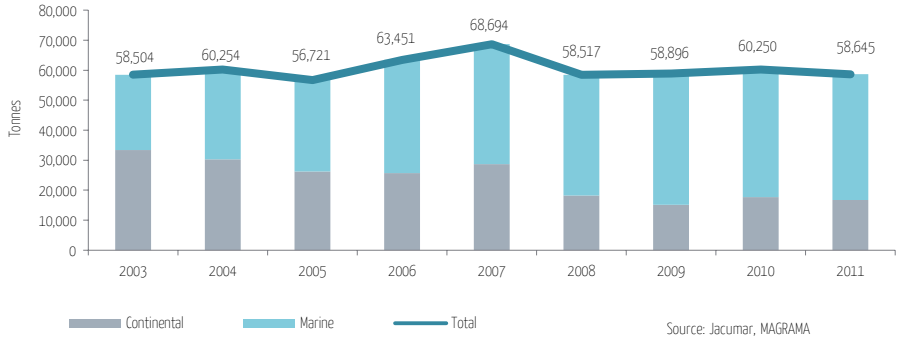
Aquaculture is the farming of aquatic organisms such as fish, shellfish, crustaceans and plants. Spain's geographical situation, ample coastline and the quality of some of the inland waters favour the existence of a wide range of areas that are suitable for the farming of these species, both marine and freshwater. This has allowed the development of multiple production systems that have encouraged the farming of different species of fish, shellfish and crustaceans. Currently, Spain is one of the top 20 aquaculture producers in the world, and has consolidated its position as the second largest within the EU.

According to the data offered by the National Sea Harvest Advisory Board (JACUMAR), in charge of facilitating the coordination and cooperation between the central and autonomic administrations regarding aquaculture, in Spain, in 2011, the total aquaculture production experienced a year-on-year increase of 3.3%, reaching 291,235 t. This increase is mainly due to the recovery of mussel production, which in the most recent year increased by 5.0%, from 216,745 t in 2010 to 227,589 t in 2011, registering values close to those recorded in 2009, when production reached 228,596 t.

However, if we analyze inland and marine, fish aquaculture production, is observed, in both cases, an evident downturn. In 2011, with an annual decrease 4.4% in inland aquaculture, production stood at 16,919 t, while marine aquaculture, with a decrease of 1.6%, stood at 41,876 t.

The trend in production by species is different. In the case of inland aquaculture rainbow trout, which represents 99% of the inland production, has experienced a year-on-year reduction of 4.1%, falling to 16,769.8 t in 2011. For marine aquaculture, the species with the largest production are gilt-head sea-bream and the European seabass; the change in production in 2011 was different for the two species with European seabass production increasing 27.7% to reach 14,876 t, and the gilt-head sea-bream production falling 16.0%, to 16,032 t in 2011.

Marine and continental aquaculture: Fish production



Source: Jacumar, MAGRAMA

Aquaculture in Spain is concentrated in the Mediterranean, south Atlantic and the Canary Islands, where there are marine farms for the cultivation of gilt-head sea-bream, European seabass, meagre and tuna, estuary farms and rafts for shellfish cultivation. In the north there are land-based farms for the cultivation of turbot, sole and red bream, as well as rafts for the cultivation of shellfish. In inland areas there are farms for trout, sturgeon, tench and salmon.

Spanish aquaculture in 2012 was made up of 5,120 establishments; 4,937 in marine waters and 183 in inland waters. Overall, the total number of establishments decreased by 0.9% last year.

SOURCES

- JACUMAR, National Advisory Board for Marine Crops. Ministry of Agriculture, Food and Environment
- Official Statistics on Fisheries and Aquaculture 2011. Ministry of Agriculture, Food and Environment

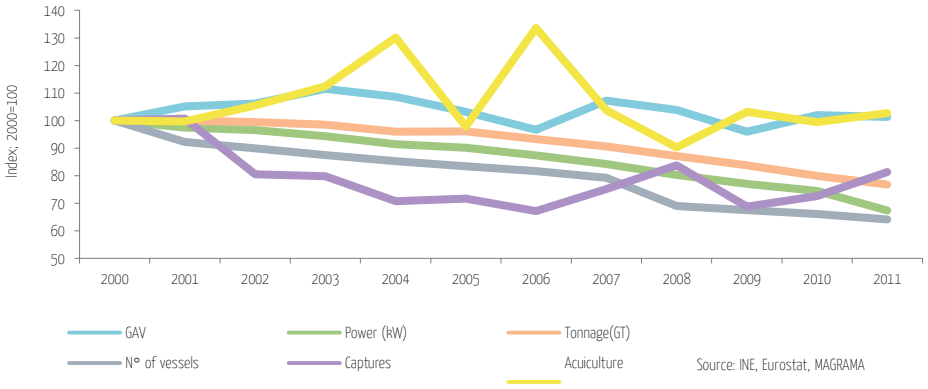
FURTHER INFORMATION

- www.magrama.es

Environmental efficiency in fishing and aquiculture

Fleet capacity continued to decrease in 2011, although catches and aquaculture production increase

Environmental efficiency in the fishing sector and the aquaculture



The analysis of the economic profitability of the sector and the pressure on resources utilised, allow us to analyse in part how the sector has evolved in terms of its environmental efficiency.

The number of vessels, power (measured in kW) and tonnage (GT) of the fishing fleet, have seen a significant decline over the reference period 2000-2011. The fall in the number of vessels, power and tonnage during that period were 35.9%, 32.6% and 23.2% respectively. Last year, the number of vessels declined by 3.1%, from 10,404 ships in 2009 to 10,084 in 2011; power declined 9.5%, from 594,219 kW to 537,807 kW in 2011 and tonnage fell 3.9%, from 166,058 GT to 159,580 GT in 2011. These declines can be attributed to the implementation of the CFP's sustainable guidelines and the aim of achieving a balance between fish stocks and fishing capacity.

In terms of catches, the trend has been variable over the reference period, with catches decreasing by 17.8%, however last year they experienced a recovery of 5.6%, from 276,995 t in 2010 to 286,236 t in 2011.

Aquaculture is an alternative to the exploitation of fish stocks, and is becoming highly important as a sector. Although last year inland aquaculture declined 3.7% with respect to the previous year, in the overall period studied (2000-2011) it grew 2.7%. The large variations the sector

experiences year-on-year are mainly due to fluctuations in mussel production.

At the same time, in economic terms, during 2011 there was a slight decrease in GVA of Agriculture, Livestock and Fisheries, both overall and at current prices of 0.7%. In 2010 the value was 24,554 million euros, while in 2011 it was 24,383 million euros. Nevertheless, for the period 2000-2011, the trend has been upward (1.3%), albeit with slight fluctuations over the years under consideration.

NOTES

- It was not possible to obtain a breakdown of data for Agriculture, Livestock, Forestry and Fisheries to calculate GVA in 2010. For this reason, GVA data at basic prices (total industry), provided by the National Statistics Institute have been used to analyse the indicator.

SOURCES

- GVA: Spanish National Accounts. INE
- Number of vessels, power and tonnage. General Secretary for the Sea. Ministry of Agriculture, Food and Environment
- Catches: Eurostat data, Fisheries.
- Marine aquaculture: Jacumar, General Secretary for the Sea. Ministry of Agriculture, Food and Environment

FURTHER INFORMATION

- http://www.magrama.es
- http://www.ine.es
- http://epp.eurostat.ec.europa.eu/