STUDY TOUR TO SPAIN
16th - 21st May 1994

Seafish Report No. 447

September 1994

Sea Fish Industry Authority
Technology Division

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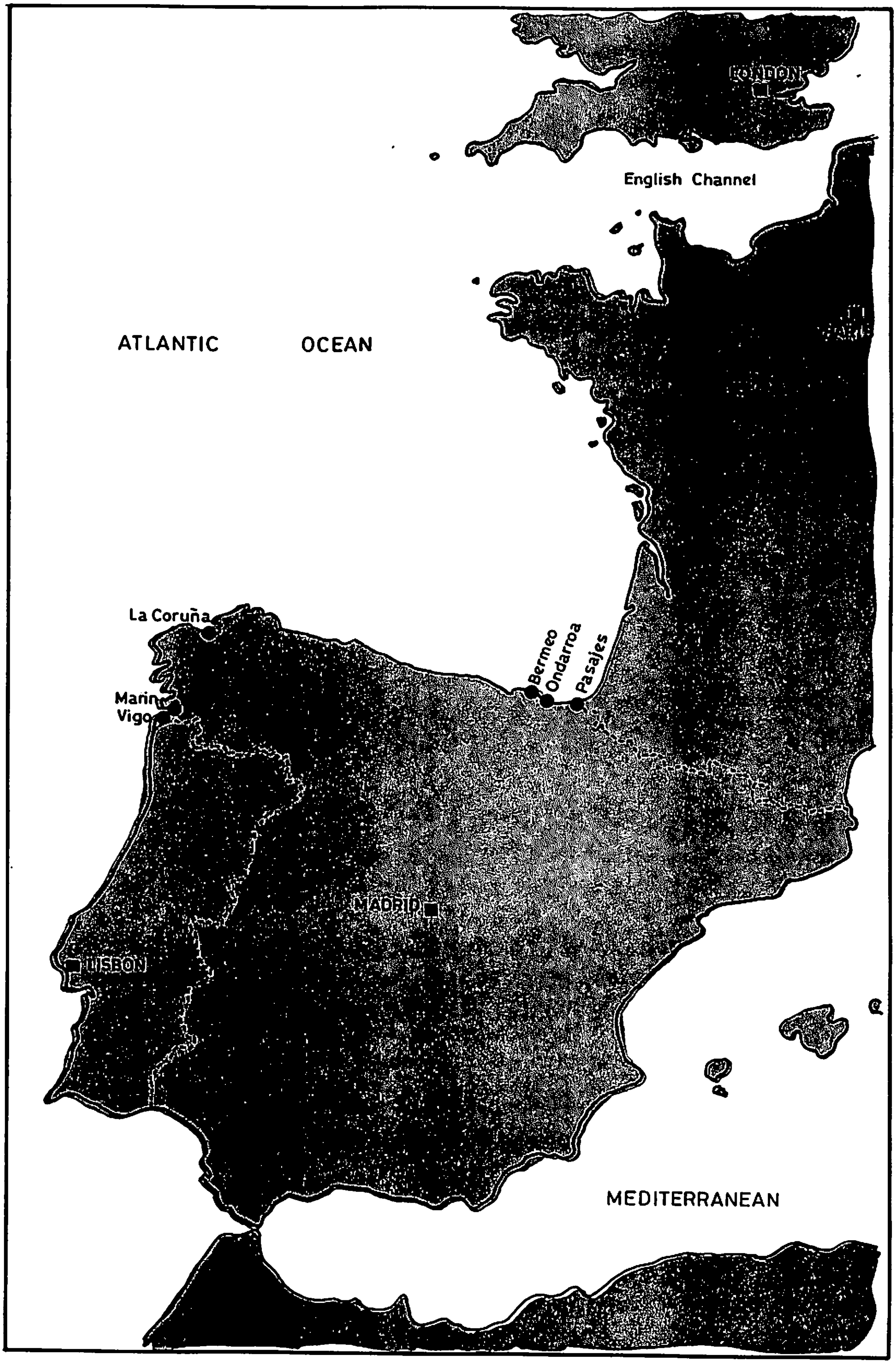
J. E. Tumilty
P. H. MacMullen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SUMMARY

A party of UK fishing industry representatives lead by Seafish, visited the northern Spanish ports of Pasajes, Bermeo, Ondárroa, La Coruña, Marín and Vigo during May 1994. The purpose of the visit was to gain a better understanding of the present situation within the Spanish fishing industry and its problems, in particular the Spanish view on their access to EU waters.

The party was well received at all the ports with open and frank discussions with various parties. The principal problems identified by the Spaniards was that of the illegal activities of some Spanish vessels and that of imports from third countries and the failure of the Central Government to take any effective action to assist its own industry.

The report describes the ports visited and then summarises the discussions held with the various organisations.

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1. INTRODUCTION

There has been a good deal of concern and suspicion by sections of the UK fishing industry over the Spanish and Portuguese accession to EU waters. In order to obtain a clearer picture of the situation within the fishing industries of the Iberian peninsula, Seafish were approached by the industry to organise a study tour. In view of the logistics of organising such a tour and probable time constraints of participants, it was decided to restrict the scope of the tour to visiting ports in Galicia and the Basque Region of northern Spain. It is from these areas that the main Spanish fishing effort prosecuting Community waters is located, also the majority of the Spanish "flag ship" operators are based here.

In order to facilitate the organisation of the tour, the Technical Director and Marine Technology Manager made a preliminary visit to Spain to establish the necessary contacts and a viable itinerary in early March, details of the visit can be found in Internal Report No. 1432. It was found later that this visit was invaluable in ensuring the main visit proceeded without major problems.

The main objectives of the tour were for the party to gain an overview as to how the fishing industry operates in Spain and how Spain's full accession to the European Union will affect each country's prospects. It was also an opportunity for an exchange of views by members of our industry with their counterparts in Spain and also gave the possibility of establishing some trading links.

2. SPAIN: A SKETCH

Spain has been a member of the EC since 1986 but is not currently due to gain full accession to the Union until 2002. Full reciprocal fishing rights, however, are expected to be established in 1996. The country has the second highest per capita consumption of fish in the world at around 40kg/annum and the second biggest fish market in the world at Merca Madrid.

The central government is based in Madrid and it is obviously the main source of power and policy on many issues. Spain operates a type of federal system however. The two regions visited, the Basque Country (Pais Vasco or Euskadi) and Galicia have semi-autonomous status. This means for example that:

- both operate their own research and development agencies in fisheries. There is a central equivalent to MAFF in Madrid but, apart from policy formulation, its functions in fisheries are very circumscribed.

- they operate their own inshore fisheries protection schemes. Officially this is only within the baseline but they actually work out to 12 miles. These services seem to have completely displaced any central authority.

- both are administering quite massive infrastructure development programmes independent of Madrid. There are many outdated facilities to be seen but equally there are many ongoing schemes that dwarf equivalent U.K. projects - for example the Grimsby development.

The most obviously active part of the Spanish MAFF is FROM - Fondo de Regulación y Organización del Mercado (de Productos de la Pesca y Cultivos Marinos) - which is responsible *inter alia* for promoting fish and standards. They run campaigns on under-utilised species and have a long-running, and very high profile, campaign on minimum sizes. Promotional work is funded by an *ad valorum* levy with special extra levy rates for specific sectoral campaigns such as a recent one for bonito.

Fishing in Spain is a vital and powerful primary industry. It is reckoned that 40% of all supplies comes from imports, but that market of 40kg x 40 million people per year powers a machine with immense commercial and political influence. The structure is very complex and has its roots in many functions of the industry, and of the society of which it is a part. For example:

- fishermen are organised into cofradias. These societies can manage social security functions as well as setting boats' landing quotas, helping to organise the auction system and engaging in political lobbying.

- vessel owners are organised into associations of 'armadores'. Each owner may be a skipper but is more likely to head the limited company that runs each boat (or 2 or 3) that constitutes the business.

- Associations of armadores can be based on a port, a species or a set of species (cod or pelagics), or an operating region, and they have set up a number of P.O.s. Most are in Spain, but there are others.

- wholesale buyers - apart from vertically integrated operators - are called 'mayoristas'. There are huge numbers of them and they are networked in very sophisticated ways. They, and the fleet profiles in each port, have also resulted in some of the port markets becoming very specialised. This means that sensible targeting of exports could allow the system to absorb larger quantities of fish than hitherto without necessarily resulting in prices dropping and resentment building against imports.

Another feature of the Spanish industry is its indigenous resource base. The Spanish continental shelf is extremely narrow - only 10kms in some places - and it drops off very sharply on the slope. This means not only that the absolute level of their demersal stocks is intrinsically low, but also that it is very vulnerable to overfishing. The stocks are quite isolated geographically so replenishment from other areas is difficult. It is for these reasons that the inshore fleet now concentrates on pelagic species whereas whitefish and demersal effort must usually be directed elsewhere.

3. TOUR PARTY

Robert Allan	Scottish Fishermen's Federation
Geoff Bullus	National Federation of Fishermen's Organisations
Arthur Cook	The Federation of British Port Wholesale Fish Merchants' Associations
Richard Coulbeck	.... ditto .....
Anthony Conium	Cornish Fish Producers' Organisation Ltd
David Leiper	Scottish Fish Merchants' Federation Ltd
William Madine	National Federation of Fishermen's Organisations
Stephen Main	Scottish Fish Merchants' Federation Ltd
Elizabeth Stevenson	Seafish Board Member
Peter Chaplin	Sea Fish Industry Authority
John Tumilty	.... ditto .....
Phil MacMullen	.... ditto .....
Mike Duran	.... ditto .....

4. ITINERARY

Monday 16th May

Evening departure from London Heathrow to Bilbao

Tuesday 17th May

Pasajes	Visit to Fishmarket and breakfast with Port Authority Tour of port and facilities. Meeting with Boat Owners' Association and Fish Merchants' Association

Transfer by coach to inland market Merca Oiartzun

Ondárroa	Meeting with Boat Owners' Association and Fish Merchants' Association. Tour of port and facilities.

Wednesday 18th May

Bermeo	Meeting with Vessel Owners' Association and Fish Merchants' Association Tour of port facilities. Meeting with Port Authorities Tour of fishmarket and fish auction

Transfer by coach to Txatxaramendi

Visit AZTI-SIO Fisheries Institute

Depart Bilbao - Santiago

Thursday 19th May

La Coruña	Visit to fish markets. Tour of port and facilities and meeting with Port Authority Meeting with Xunta de Galicia (Regional Government), Fishing Vessel Owners' Associations, Merchants and Processors Lunch with Fish Merchants' Association

Friday 20th May

Marín	Visit to fishmarket Tour of port and facilities Meeting with boat owners, fish buyers and visits to processors (Marfrio)
Vigo	Meeting with Merchants' Association Tour of docks complex Visits and meetings with Vigo Boat Owners' Coop

Saturday 21st May

Visit by coach to Ribeira (busy provincial port)
and shellfish growing areas

Return from Santiago to Gatwick.

5. SUMMARY OF VISITS AND MEETINGS

5.1 Pasajes

An early morning visit was made to the fish market at Pasajes in order to observe landing and the firsthand sale of fish. The party was met by José Antonio Urritichoechea and a general tour of the market was made.

Pasajes is a large and thriving commercial port, close to the French border and with a long and successful history of international trade.

In 1976 the port was home to around 200 hake trawlers. The local Association of Armadores claim they have conformed fully with EC capacity reductions and the hake fleet now numbers only 15 large trawlers and 10 liners mostly fishing in European waters. There are also around 35 French boats regularly landing direct plus a small fleet of inshore boats. The locals specialise in hake and monk whereas the French tend to land 'complementary' species - soles, cuttlefish etc.

There is also a modest fleet of cod boats - members of the Vigo Co-operative - fishing outwith Community waters and freshing, freezing and salting.

With the decline in the catching sector Pasajes has developed into a major import/packing/distribution centre drawing supplies from Eire, France, U.K. and Denmark among others. It is claimed that it originated the inclusion of imports in its fish market and it is obviously still an important centre which is always looking to extend its supply base. The port market is complemented by another, stronger on overlanded fish, based near the north coast motorway.

There are two markets at Pasajes, one dealing with overland and fish landed by vessels working offshore and the other dealing with inshore landings.

On the morning of the visit there had been a landing by a French vessel and overland fish from Italy which originated from a Croatian vessel on the offshore market. Landings from several inshore vessels were seen on the inshore market.

A Dutch auction system operates on both markets, the offshore market using auctioneers and the inshore market a clock.

The quality of the fish seen was generally very high having been well looked after and iced. The landings on the offshore market mainly consisted of hake, mackerel, scad and nephrops. There was a wider variety of fish on the inshore market.

The overland fish from Italy consisted of a good deal of small hake and mullet but it was being sold openly as there are no size restrictions on fish emanating from Mediterranean sources.

The fish once sold was moved very quickly by the buyers (wholesalers) and either repacked on the spot or put onto transport for distribution to other parts of Spain. The market was generally clean and well organised with plenty of ice available which was used effectively on the fish.

On the question of market inspection, it was stated that EC inspectors of Spanish origin visit the market about every 2 months. The timing of their visit is normally known about 2 weeks in advance.

5.1.1 Meeting with Vessel Owners and Merchants (Wholesalers)

Following the visit to the market, a meeting was held with the representatives of the vessel owners' association and the wholesalers. José V. Lizarraga is the principal representative of the vessel owners association and Francisco Rodriguez for the wholesalers. There were also several other officials from both organisations present.

A general overview of the position of the vessel owners in the port was given and it was explained how the fleet had been significantly reduced in recent years through the Government/EC decommissioning scheme. There is, however, still a 20,000t annual throughput due mainly to overland fish passing through the market, virtually all of it being auctioned. Much of this is either re-distributed to other parts of Spain or passes through the large Oiartzun market a few kilometres inland where it is then re-distributed.

It was claimed that market stability was maintained by fish passing through the auction. One of the major problems perceived by the wholesalers and the vessel owners was the large quantities of imported fish passing through the central markets of Madrid and Barcelona. They claim that this has forced prices down and that they are now lower than they were 16 years ago. There is no control over imports and Spain is being used as a dumping ground. They have approached the European Commission on this matter but the Commission state that there is insufficient product to satisfy the Spanish market. The merchants maintain that this is untrue and that for some species there is over-supply and for others under-supply.

The vessel owners then put forward their difficulties and problems. Apart from low prices, one of their major problems was seen as the activities of illegal Spanish vessels and the restriction imposed upon the vessels who chose to stay legal with the days-at-sea agreement.

When Spain joined the Common Market in 1985, 300 vessels were given licences to fish in Community waters, however, only 150 of these were allowed to fish at any one time. In order to achieve this position, a strict and inflexible days-at-sea regime was introduced.

Vessel owners are required to inform the European Commission in Brussels three months in advance which area their vessels will be fishing and the number for the next month. The allocation of days to each vessel is decided upon by the local association of vessel owners. A list is produced and circulated to the various regulatory authorities. Once the list has been circulated and vessel time allocated, there is no flexibility in the system. If a vessel is prevented from fishing by bad weather, engine failure or any other problem, it is unable to regain any days lost due to unforeseen circumstances. Vessels must check in and check out at the beginning and end of fishing operations giving their positions. This information is also recorded in their log books.

The definition of what constituted an illegal vessel was somewhat vague, but was generally taken to be vessels with licences, but which were fishing in areas or at times at which they were not permitted. However, it was later stated there were also vessels without licences which were fishing and which should not be fishing under any circumstances. It was said that Madrid was too lax over licencing.

The vessel owners were disappointed that not more action was taken by the regulatory authorities in Areas VI, VII and VIII, in particular the Irish and French, as they were in possession of the list of vessels allowed to fish in their areas. The British were given credit as being stricter about these matters. The numbers of vessels fishing illegally in Community waters also seemed to be rather vague, a figure of anything up to 600 being quoted. Some of these included licensed vessels fishing illegally as well as unlicensed vessels.

There was a general feeling that the vessel owners who chose to stay legal were penalised and that it was difficult to remain viable. Many fishermen have become bankrupt as a result. They are looking for some sort of financial support from the Commission. It is for these reasons that many owners chose to engage in illegal fishing activities as it is sufficiently lucrative to be worth taking the risk of being caught and fined although the fines could be substantial (£150,000). It was also stated that some Spanish vessels without licences were re-flagged under British registry and thus became legal.

The problem of flag-vessels was given a good deal of discussion and the Spaniards found it difficult to understand why the British allow the situation to continue even though it was explained fairly forcefully that we, the British, had been over-ruled by the European Court.

5.1.2 Visit to Processing/Freezing Plant

A short visit was made to the Pasaia processing and freezing plant which was situated adjacent to the fish market. The cold store is 50% public funded and is of 19,000m³ capacity holding 2,000t of product with an annual throughput of 2,500t. At the time of the visit the main activity was the production of squid rings from squid caught off the Falklands (Malvinas) frozen at sea and imported. There were a number of product lines including fillets and cutlets of various white fish species and paella and fish soup packs. The hygiene, health and safety standards could have been better.

5.2 Merka Oiartzun

This is the new inland market situated just off the motorway about 10kms from Pasajes and about the same distance from the French border at Irun. The party was met by the President of the market, Jesús Garcia Morillo, and given an explanation of how the market operated and a tour of the facilities.

He claimed that the market is the first private commercial wholesale centre for fish in Spain that is approved by EC. There are approximately 45 merchants or wholesalers who have premises there with a throughput of 20,000t. Fish is received there from all over the world on a 24 hour basis and is re-distributed by truck throughout Spain. Some of it is sold by auction at the market. Fish can be bought on Pasajes market and sold again at Oiartzun. There is a considerable quantity of cold storage and chill space available. The party's main interest in this facility was the possibility of setting up trade contacts.

5.3 Ondárroa

A visit to Ondárroa, situated some 40kms west of Pasajes, was made in the late afternoon. Because of logistical constraints, it was not possible to be present for the early morning fish sales. Arrangements were made to meet with the local vessel owners' association and the wholesalers.

This is the port where the "Cook Report" was filmed and the meeting held during the preliminary visit was somewhat difficult. However, it was evident that we had broken the ice sufficiently for them to agree to meet the main group.

5.3.1 Meeting with Fishing Vessel Owners and Wholesalers

There were present at the meeting a group representing the wholesalers, President José Muiños Todea, and the fishing vessel owners President, José Aguizzegomez Cora Lecertua. Present in the fishing vessel owner group was Jon Beristain, a flag ship operator, and Chief Executive of vessel owners, Francisco Marin.

The discussion followed similar lines to that held with the owners in Pasajes. The Spaniards felt that they had not been treated equally compared to other fishermen in Europe. Their fleet had been reduced through decommissioning since entry into the Community when they had been assured by their Government that entry would be good for fishing. It was now eight years since entry and all they had was broken promises. The British were criticised for allowing the proliferation of flag vessels. It was explained that the UK had been taken to the European Court following the decision to remove Spanish owned vessels from the register and the Court had found against the UK and the vessels had to be reinstated. This information did not seem to impress the Spanish. The UK was also criticised for not taking steps to reduce its fishing fleet in line with MAGP. The number of Spanish vessels now allowed to fish was less than the original 300, and now numbered about 250. The other problem perceived by the vessel owners was that of restrictive quotas. The Spanish only have quotas for seven species:

hake, monk, megrim, horse mackerel, blue whiting, nephrops and pollock. Any other fish caught has to be discarded, they have no quotas for cod or haddock in Community waters.

The discussions with the merchants also followed similar lines to those in Pasajes. The restrictions on the Spanish fleet require a large amount of fish to be imported into Spain. Unfortunately, the majority of this fish enters via the central markets, for example Merca Madrid and Merca Barcelona, resulting in the price structure being undermined. If imports were directed through the ports rather than the central markets, there could be better distribution throughout the country. This would also give price stability. The merchants claim that they have a good knowledge of the various markets throughout the country and that different areas require different fish. They claim that under the present system, the market becomes glutted with the wrong type of fish.

They want the Spanish Government to develop policies to overcome these difficulties over supply and prices including restrictions on imports. Their Government does not appear to be taking any action along these lines however.

The question of Spain's full accession in 1996 was raised but neither the vessel owners nor the wholesalers thought there would be much change, mainly due to pressure from other Community governments.

The issue of illegal vessels was again raised and it was said that they were the only ones making money. Again it was said that the relevant authorities were not exercising sufficient control of the activities of these vessels. The identification of the relevant authorities was not made clear but it was inferred that it was the Central Government in Madrid.

There then followed some discussion as to how fish was sold in Ondárroa.

The selling arrangement here is curious and reflects the chronic shortage of space. There is no market hall. Each boat owner (= fish seller) has the equivalent of a very large lockup garage in which he displays his own fish. Buyers inspect the fish then gather in a buying room where the auction takes place. Presumably if a potential seller cannot display fish then it cannot be sold.

The fish is sold either via the cofradia or by a wholesaler, the order of selling being according to arrival time. A new quay and access road are being built which will give some relief to the chronic overcrowding and congestion in the port.

After the meeting there was an opportunity for a limited tour of the port, but there was little activity due to the time of day and the week.

5.4 Bermeo

The port of Bermeo is quite different to the two previous ports visited. It is the main blue (pelagic) fish port in the Basque Country. The major fishing seasons are:

February/March - May/June	Anchovy	by purse seine
June - November	Tuna	pole and line and trolling
	Mackerel	hand lining
November - February	no fishing takes place, vessels are laid up or refit/paint during this period	

All fresh tuna is disposed of within Spain. The port also has a tuna cannery but this is fed almost exclusively from frozen material taken from tropical waters. The traditional pelagic sector here is called artesanal even though it includes boats of >20m. Most of them are specifically licensed to fish coastal waters and they have experienced a great deal of conflict with French (and some Irish) netters and pelagic trawlers. The claims are that these fleets take the catch before it comes into range, obstruct the Spanish effort by blocking off areas and - especially the French - catch grossly over-quota.

There are 35 large vessels (>20m) and 50 small (>10<20m) in Bermeo.

All boats belong to the local cofradia and all catches have to go through the auction. The cofradia will set landing limits where necessary to protect prices.

Bermeo has had landings of white fish but the narrowness of the coastal shelf has resulted in these resources being relatively over-exploited for many years.

The port is benefitting from a substantial and prolonged development programme which includes the aim of attracting a more varied mix of boats, landings and buyers. Fernando Loiti is responsible for developing the new market building in all these respects. A Neaff Smit auction clock has been installed successfully and is being used both by the traditional wholesaling sector and by new multiple buyers.

5.4.1 Meeting with Vessel Owners and Wholesalers

The discussions here were somewhat different to those held in Pasajes and Ondárroa because of the main interest in the port being in pelagic fish. The main complaints were against the French who, apart from being blamed for problems in the tuna fishery, were also held responsible for the demise of the local demersal fisheries by overfishing the stocks of bream and monkfish. It was stated that there had been too much effort by the French, both by use of trawls and longlines. Six to seven years ago the coastal fisheries were good and vessels were able to make a living during the winter months on demersal fish by use of gill nets and lines, but this is no longer the case.

The question of the CFP and full Spanish accession in 1996 was raised. The fishermen thought that there would be some advantages with better access to grounds off Portugal, the Azores and in the French sector, for pelagic fish. The 300 vessels mentioned in the two previous ports have no relevance to the pelagic fleet.

There were complaints about lack of controls over fishing activities. The Basque autonomous government has jurisdiction up to 12 miles offshore and the Spanish navy outside of that. However, it was stated that there was no effective policing by the local coastguard, the monitoring of fishing activities and the penalties imposed were no real deterrent to illegal fishing. The Basque Government had promised to provide an effective service but the fishermen felt that it was now too late.

On the question of a policy on vessel building, it was stated that the fleet had been reduced in compliance with the MAGP and it was not possible to increase the tonnage. In order to build a new vessel, the same tonnage had to be disposed of before building. Grants were available, 25% from Basque Government and 15% from the Commission. Twelve pole and line boats have been built recently.

It was mentioned that supplies of pelagic and demersal fish were always required by the wholesalers.

5.4.2 Meeting with the Director of Fisheries and the Director of Basque Ports

The Director of Ports explained how the ports were managed. Bermeo and Ondárroa were administered locally, whereas Pasajes comes under the jurisdiction of Central Government. There has been significant improvement in the infrastructure over recent years and the Basque ports have good facilities for the sale of fish. Additional supplies of fish to the ports from other EU countries are welcomed to supplement the shortfall in landings from Spanish vessels.

The Director of Basque Fisheries, Miguel Muruaga, then spent some time explaining the position with the Spanish fishing fleet, in particular those vessels with access to Community waters. The picture that emerged was a confirmation of the situation that had already been explained in Ondárroa and Pasajes. The Spanish have been restricted to 300 vessels allowed to fish in these areas, however, the real figure should have been 150. At the time of the agreement for entry into EC, the fishermen were under the impression that all 300 would be allowed to fish at the same time, however, this was not the case and only 150 could fish at any one time. These rules caused very great problems for vessel owners and a significant number had gone out of business. It is anticipated that the 300 vessels will eventually be reduced to 150 by natural wastage, i.e. economic viability. However, as these people are endeavouring to make a living for themselves and their families, they will naturally continue fishing for as long as possible, even if this means breaking some rules. It is hoped that once the fleet is reduced to its correct size, then this will not be necessary and Spanish fishermen will be seen in a much better light

In the tuna fishery, two main problems were highlighted.

i. Catching of tuna by use of drift nets by French, Irish and British vessels offshore preventing the tuna from coming within the range of the Spanish pole and line vessels.

ii. Illegal activities of the above-mentioned vessels using illegal lengths of netting and not fishing in designated areas.

In general it was felt that Spanish fishermen were disadvantaged following their accession to the EC in 1986. Promises had been made but not kept by Central Government, the impression gained by the fishermen was that the agreement with the EC was to have been modified but this had not happened.

The problem of illegal vessels was also raised, but Central Government was seen to be turning a blind eye to the situation. There was no mention at this meeting concerning the failure of other countries to take appropriate action against illegals.

The problems caused by the importation of fish from 3rd countries was also raised along with the effect that it had in the market and prices to fishermen.

There was concern by everybody over the level of fish stocks, but there was also a recognition that fishermen were driven by the need to earn a living and, therefore, tended to take a short term view. There was still too much effort deployed in the EU, further funds from the Commission are necessary for decommissioning. This applied particularly to the tuna fishery.

In summary, the view is that Central Government (Madrid) is not doing enough to control fishing activities or to help the industry.

5.4.3 Visit to the Port

Following the meeting, a visit was made to view the port facilities which include a new breakwater and berthage for both commercial and fishing vessels and the new fish market and auction. A large amount of money from both EC Central Government and local Government sources has been made available for this work. Vessels fishing for anchovy land at various periods throughout the day and one such landing was observed along with the auction using the new auction hall and clock. In common with most pelagic fisheries, a sample of the catch is laid out for buyers to inspect before bidding commences rather than the whole catch being viewed. Once sold the fish is quickly transported away for further sale, either locally or in other parts of Spain.

The Port Authority is keen to increase the throughput of the port and is actively encouraging foreign vessels to land in Bermeo. Overlanded fish is also of interest including demersal species. The facilities in Bermeo were some of the best seen during the tour, the market hall and associated cold stores, auction hall and offices are of good quality.

5.5 Visit to AZTI-SIO

A short visit was made to the local fisheries research institute AZTI-SIO which is a part of the Basque Regional Government.

The institute is concerned with three areas of activity:

- Oceanography and Marine Environment
- Fishing Resources
- Food Technology

A short tour of the premises was made. It is very well equipped, thanks to generous funding in recent years. As well as carrying out publically funded work, it is very active commercially selling its services mostly to the food industry. It describes itself as a technological institute for applied research and a service and technical consulting company. It also has the advantage (to staff) of being situated in a very attractive setting on a small island overlooking the river estuary.

The party then proceeded to Bilbao Airport and on to Santiago and La Coruña.

5.6 La Coruña

La Coruña is by far the most important fresh fish landing and distribution centre in Spain and the biggest freshing port in Europe. The first visit of the day was to the fish market. A very few small-looking whiting and mackerel were in evidence but otherwise supply was of good quality large fish including hake, monk, scabbard, forkbeard, cod, saithe and Nephrops.

The situation on the market seemed to be chaotic with an incredibly high level of noise accompanying the sale of fish and its almost simultaneous removal from the market, further fish being brought onto the market either from vessels or from trucks to be sold later. The operation was very labour intensive.

Most of this fish was landed by the larger boats working from La Coruña but outwith Spanish territorial waters. There are about six major fish markets in Galicia with smaller markets every 10-15 miles along the extensive coastline.

The small boat inshore fleet in Galicia comprises some 6000 vessels. However, 'small' in this context ranges from 3-30m in length,

There are now 96 UK flagged boats, over 60 of which landed direct to La Coruña. These boats (apparently) account for more than 50% of all landings into La Coruña. There are a further 30 Dutch flagged boats and a few German flagged.

The fish port committee co-ordinates landings which are planned six days in advance. A maximum of seven trawlers plus four liners is allowed each day as well as whatever is landed direct or overlanded from the inshore fleet.

The quality of the fish, as previously mentioned, was generally high but possibly not quite as good as that seen in Pasajes.

5.6.1 Visit to Port Authority

La Coruña, as well as being a major fishing port, is also a major commercial port with over 12M tonnes of cargo being handled (1992 figures). The amount of fish passing through the auction annually is normally about 70,000t, although there has been a decrease in recent years. The value of fish sold is about 18,000M Pesetas (£90M) which is claimed to be the highest within the EU.

The whole port is being developed with new berthage and facilities being constructed. These include new facilities for the fishing industry which will increase the number of berths and provide a new market building.

A large model of the port and the developments was seen as well as a short video promoting La Coruña. The increase in facilities for the fishing industry seem somewhat curious as the whole sector has been contracting over recent years, but no doubt there were sound political reasons for this to be carried out. It is hoped that the new facilities would attract other EU vessels.

5.6.2 Meeting at Xunta de Galicia

This meeting consisted of representatives of the fisheries Department of the Regional Government (Xunta de Galicia) and representatives of the vessel owners associations (Pesca Galicia & Arpesco), José Carlos Diaz and Don Jesus Etchebers Durán. The Director of the Fisheries Department is Don Juan Otero. There were a number of other owners at the meeting as well as the operator of the local processing/freezing plant Campañia Frigorifica SA - Carlos Fernandez Casal, and some aquaculture interests.

The Xunta is very active in its inshore patrol functions and although officially constrained to operate within the baseline they do work out to 12 miles. In most areas this does, in any case, cover most of the Spanish shelf, hence most of the demersal fisheries. There may be a case for arguing that the national government should monitor semi-pelagic and pelagic species more closely but that sector of the total fleet is relatively small. The case was put strongly that inshore fisheries management is as good as anywhere in Europe and is supported by an impressive array of Land Rovers, helicopters, semi-rigid inflatables and displacement craft.

However, if a vessel is found to be fishing illegally (for whatever reason) between the baseline and 12 miles, the only recourse for the Xunta is to refer the matter to Central Government in Madrid to take suitable action, which is, of course, a protracted business usually.

On the question of minimum landing sizes, it was stated that these were vigorously enforced and for species for which there were no minimum landing size, they had made their own rules and have asked other markets to adopt these sizes. The fine for selling undersized fish is up to 10,000,000 Pesetas (£50,000). These penalties can be imposed anywhere in the chain, i.e. from catcher to retailer. The markets are inspected every 3 months by an EU inspector giving 2 weeks notice, however, these rules are about to be changed and no notice will now be given.

Difficulties are being experienced with new EU regulations concerning the labelling of fish, they require a phasing in of these regulations, and a recognition that the Spanish market is different to the rest of Europe.

The vessel owners felt that the arrangements for Spain within the EU put Spain at a disadvantage. They required that the necessity to provide the list of vessels showing where and when they were fishing should be eliminated. They wanted a system with licences and quotas but with freedom to fish where they wished. It was said that Spanish quotas were much lower than other countries. The British Government were criticised for not introducing a proper decommissioning scheme.

The owners wanted Spain to be treated as an equal with the same fishing rights as other countries. The Irish Box, in particular, should be open to all Community countries - this was agreed in article 158/4 and the Irish have resisted the agreement.

The problem of illegal vessels was raised and a definition of what constituted an illegal vessel was requested. They were said to be either vessels without licences or vessels fishing in areas or by methods not allowed. One of the problems was the difficulty in distinguishing between legal and illegal vessels. The various authorities were not taking action to stop these activities.

Flag of Convenience ships were also seen to be detrimental to Spanish owners operating vessels under the Spanish Flag. Again surprise was registered that the UK allowed such vessels to operate. The consequences of the European Court case against the British was pointed out and the UK was now unable to take action against such vessels and that they had to be allowed on the register.

Fish imports from third countries also rated highly as a difficulty for the catching side of the local industry as it undermines the local markets. The owners did not foresee any significant changes or benefits happening in 1996 and said that they were basically not interested in fishing in the North Sea.

The number of vessels being built in Spain was raised, but it was pointed out that any new tonnage must replace existing tonnage. It was again pointed out that Spain had reduced her fleet according to the MAGP and UK had not and, therefore, it was now difficult for UK to engage in new building.

It was stated that the port of La Coruña was the best in Europe for fish prices. The port development and increased facilities for fishing vessels was queried given that the fleet was decreasing. This concern was echoed by the vessel owners who could not understand whey the Port Authority had spent the money in the way that they had done.

Overall there was a feeling of dissatisfaction with the way in which the affairs of the fishing industry had been handled by Central Government. It was pointed out that fishing in Spain only contributed 1% to GDP, however, in the northern coastal areas much of the economic activity was associated with the fishing industry. Despite this degree of local importance, Central Government had not shown a great deal of interest in the industry.

5.6.3. Visit to La Coruña Wholesale Merchants' Association

The Association is run by a lady, Maria de las Nieves Pallares Manso, and it is the largest in La Coruña.

There are some 1500 wholesale merchants and the Asociación de Mayoristas Exportadores de Pescados y Mariscos has a membership of over 400. It is a cooperative and owns and operates 86 trucks - mostly in the 17 tonne class - but including artics too. Their President and others described passionately how the distribution net from Coruña was the most comprehensive in Iberia reaching every part of the mainland as well as all the island groups. They claimed that with the range of outlets they had that it would be possible to double their throughput without necessarily compromising price levels. The merchants emphasised the importance of quality, handling, packing and general presentation in order to take best advantage of the opportunities in Spain.

The market problems concerned what amounted to dumping of large volumes of mediocre fish direct to the easily accessible Mercas (Madrid, Barcelona, Zaragosa etc.) as well as the supply of good quality Norwegian salmon and air-freighted Chilean hake. Imports were accepted as a necessary fact of life; the complaint here, as elsewhere, was that instability led to price relativities being upset and all concerned making less than they could for their products.

5.7 Visit to Marín

Marín is an old commercial port that is being developed as a mixed port. The level of investment is quite extraordinary. 40000t of cold storage have been built recently with a further 10000t under construction. A brand new fish market, port offices and boat owners' offices are being built alongside a new and fully equipped commercial area specialising in grain and timber. An ice plant had recently been completed on the old market.

The existing fresher fleet comprises some 60 boats. About 20 target Nephrops, 30 go for demersal species in Community waters and a further 10 fish for pelagics in Portuguese waters. There are a further 40 freezers - 25 working off Morocco and 15 in the N.Atlantic - and five flagships working from here.

50 merchants are based here and the port market is very highly specialised towards megrims. The merchants thought they could accommodate almost any quantity of that species as well as >10 tonnes of cod and good volumes of hake daily. The freezer fleet lands bulk cephalopods along with demersal gadoids. 90% of the former are destined for Japan.

The local yards and owners are involved with some of the 17 new buildings that have attracted so much attention recently. Grants are available for new buildings but the old vessels have to be scrapped and do not attract any decommissioning funds.

A short visit was made around the port facilities, this was very much restricted due to the appalling weather conditions, high winds and driving rain.

5.7.1 Meeting with Vessel Owners and Wholesale Merchants

Present at the meeting were Senor Touza Ferrer, President of the Vessel Owners (Asociacion de Armadores de Buques de Pesca), and the Director, Juan Carlos Martin Fraguiro. Senor Touza is also President of the Producers Association. Also present was Fernando Freire, Port Wholesalers.

Following a general description of the operations at Marín, the problems imposed on Spanish vessel owners by the days-at-sea regime was explained at some length. The majority of the information was similar to explanations in previous ports, i.e. requirements for checking in and out of fishing areas, reporting quantities on board every week to the Commission. If there are infringements, action is taken by Central Government, a vessel can be prevented from fishing for up to 4 months and hefty fines imposed. It was reported that a Spanish vessel fishing off Portugal had been fined between 1 and 4M Pesetas for a log book infringement. Vessels are also constrained by quota take up as they are in the UK. The quotas are allocated to the POs and not the individual vessels. If there are infringements outside of Spanish waters, i.e. in other Community waters, these should be dealt with by the appropriate national authorities.

In respect to the situation after 1996, the owners would like, if possible, to have freedom to fish throughout Community waters, i.e. Common waters as well as a Common Market, greater flexibility.

The problem of imports from third countries is seen as a particular problem that was destabilising the market in Spain and the rest of Europe. There should be a common stand against imports, Spain in particular is the dumping ground of Europe for fish. One of the difficulties is that there is little co-operation between merchants and catchers and that fish being an international commodity made it difficulty to control. It was pointed out that some countries do manage to control imports by devious means such as hygiene regulation, but there was no interest in this approach in Spain.

In further discussions concerning the (industry's) future after 1996, it was thought that there would be little change in the current situation. It will be a cosmetic exercise by the Spanish Government who try to show to their fishermen that they have been given a good deal.

The amount of fishing effort by the French using drift nets was criticised for the same reasons as described earlier. The view being that drift nets should be banned totally.

Finally, after a question on fish prices, it was found the hake was fetching about the same as the UK and megrim prices were better in UK than in Spain £4-5 per kilo.

Following the discussions with the vessel owners and wholesalers, a visit was made to Marfrio, a processing plant and cold store in the port area. The company provides a variety of products, white fish fillets, cutlets, etc. and squid rings. There was a good deal of mechanisation in the plant with several different types of freezing equipment. The standards of hygiene were much higher than seen in Pasajes. The company own a number of freezer vessels which operate on a worldwide basis, they produce about 20,000t annually. Fish supplies, therefore, are obtained both from their own sources and on the national and international markets.

5.8 Vigo

Vigo is the largest freezer port in Europe and it supports up to 3000 licensed buyers operating in the wholesale sector, although many of these are quite small. It is worth noting that salmon - fresh and smoked - is sold through the conventional fish market system.

The area obviously supports a large number of processors adding value to the mainly frozen feedstock. By far the largest and most prominent of these is Pescanova which also has subsidiary companies in most of the countries in which they operate to any significant extent. Pescanova (= new fish) directly controls ~140 large fishing vessels and has a fresh fish division called Pescafresca. They are based in frozen fish, processing and ready meals, but their activities now cover the full spectrum of food products in an increasingly vertically integrated operation. Pescanova, like many other Iberian companies, has successfully travelled up the chain of supply towards the resource base to the extent that they now control most of the value-adding stages in their various theatres of operation. It was, unfortunate that Pescanova declined to meet the group despite strenuous efforts to arrange a suitable meeting.

5.8.1 Meeting with Wholesalers Association

Acopevi - Asociacion de Comercializadores de Pescado de Vigo

The association consists of 105 fresh and frozen fish dealers, the throughput of the market is between 80-120t per day, 15 years ago it was 250t. 70-80% of supplies are obtained from local sources. Fish is sold on commission only with no guaranteed price.

The same complaint about the problems of fish being sent directly to the central markets of Madrid, Barcelona, etc. from third countries was raised again. It was argued that the network of fish distribution from the ports was superior to that provided from the central markets. The glut of fish being sent to these markets tended to depress the prices. The ports network could overcome the problems of oversupply in any one area, and that they could match supply with demand. The Madrid market, it was claimed, only had access to 8M consumers whereas the Vigo market could access up to 30M. There was the usual call for controls of imports through the intervention of the Central Government. It was claimed that fish generally reached higher prices when sold through the ports and more fish supplies were actively being sought from elsewhere in Europe.

5.8.2 Meeting with Co-op of Vessel Owners of Vigo

Present - José R. Fuertes, Reinaldo Iglisias Prieto

The meeting opened with a statement that it was time that the rest of Europe had a better understanding of the Spanish situation and that they (the Spanish) had not taken the trouble to explain their point of view. A description of the activities of the co-op then followed, this can be found in Internal Report 1432. There are 280 vessels in the organisation, both fresh and freezer vessels, this has dropped from over 400. The reduction in vessel numbers has been achieved through a decommissioning scheme supported by EU, Government of Galicia, Central Government and through the sale of vessels to countries outside EU. The general terms of Spain's accession to the Community was criticised. The Government was doing nothing about third country imports and the market was flooded with cheap fish. Protection was required against them. The development of fisheries by an independent Namibia had caused problems for the local fleet as much of that fish is finding its way into the market, the negotiations over fishing rights should have been carried out by a Spaniard.

Flag ships were also seen as a threat to the fishermen, although illegal vessels were more so and they affected not only the Spanish but Irish and British fishermen. Only a united approach to respective Governments and to the Commission would force any change to be made to eliminate illegal vessels. Again there appeared to be those with quotas and licences but fishing illegally and those with neither. It was said to be difficult to detect illegal vessels and much easier to target legal vessels for any infringement of rules.

The Group was then informed of a meeting that was to take place on the following Thursday, 26th May, in which representatives of all 300 legal vessels would meet in Madrid to discuss illegal vessels and to persuade Government to take more positive action. Senor Fuerte was chairing the meeting and it was suggested that subsequently representatives of Spain, Britain and Ireland should meet to discuss the same subject and to try to influence the Commission to take action. The Spaniards would, of course, like in return more flexibility over days-at-sea rules. It was agreed that various organisations should keep in touch.

5.9 Visit to Ribeira

There were no meetings in Ribeira, it was simply an opportunity to see one of the larger inshore ports in Galicia. It is one of the two or three biggest inshore ports in Galicia. There are three basins accommodating about 50 trawlers of up to 30 metres (averaging maybe 20m) and at least 50 creel boats of 3-10m. A lot of the larger boats were rigged for pair trawling (parejeros) using 60-70mm mesh nets - apparently for blue whiting. It may be worth noting that although a lot of boats were claimed to be targeting blue whiting for human consumption this species was never seen on the markets. It was said to be sent to Madrid and Barcelona.

The leader of the local Cofradia, José Manuel Perez Raz, showed the party around and explained the wide range of fishing activities that took place from the port. There was a small freezing plant that froze sardine as bait for the longliners. There was also a large fleet of small open boats working fish traps and pots and used for hand dredging of shellfish beds.

The party then returned to Santiago for the flight to London.

6. DISCUSSION

During the visit a number of the problems faced by the Spanish fishing industry were highlighted. There were two particular issues that were common to all the ports and groups visited; one was that of illegal vessels and fishing activities and the other was that of the supply of fish from third countries to the larger internal markets.

6.1 Illegal Vessels and Fishing Activities

The most pressing of these problems was that of illegal fishing or fishing by illegal vessels and the failure of the Spanish Government to take action against them. The situation was seen to be most detrimental to the position of vessels and owners who stayed within the rules.

The definition of what exactly was meant by illegal vessels varied slightly from port to port. In some discussions it encompassed Spanish vessels fishing without licences or quotas and also Spanish vessels with the necessary licences but breaking the current rules.

When Spain joined the Common Market in 1985, 300 vessels were allowed to fish in Community waters, however, out of this 300 vessels, only 150 vessels were allowed to fish at any one time. In order to be able to achieve this position, a strict and fairly inflexible days-at-sea regime was introduced.

Vessel owners are required to inform the European Commission in Brussels, three months in advance, where their vessels will be fishing and for how many days during the next three months, the allocation of fishing time is decided upon through the local associations of vessel owners. A list is produced and circulated to the various regulatory authorities. Once the list has been circulated and vessel time allocated, there is no flexibility in the system. If the vessel is prevented from fishing by bad weather, engine failure or any other problems, they are unable to regain any days lost due to unforeseen circumstances. Vessels must check in and check out at the beginning and end of fishing operations giving their position, this information is also recorded in their log books. This regime obviously makes for operational difficulties for vessels and owners who wish to stay within the law, it also has caused them difficulty in remaining viable.

The owners and operators of the fully legal vessels complain bitterly that there is a fleet of vessels who operate totally illegally, the numbers are put variously between 150-600 in Community waters. These consist of Spanish vessels without licences and those with licences simply breaking the rules. They say that the illegal vessels are well known but Central Government do nothing to stop these practices. However, the official view is that it is difficult to know when a vessel has been fishing illegally, as when it arrives in port it could have come from anywhere. Although it is difficult to understand how an unlicensed vessel can land its fish, however, it is understood that there are ways around this problem given the quite large amounts of money being earned by the illegal vessels. The arguments put by the owners of the legitimate vessels pointed out that it was so lucrative to be illegal that it was worthwhile taking the risk of quite substantial fines if caught. A delegation of Spanish vessel owners were going to put all these points to the Spanish Government officials at a meeting on 26th May. They also implied that other countries enforcement agencies, i.e. Irish and French (in particular) did not take the appropriate action against the illegal vessels even though they are in possession of the official vessel listing.

The issue of flag ships is also of as great concern to the Spanish fishermen as it is to the British as again they perceive that they are undermining their own position and do not have to comply with the same stringent rules. It is obvious that these vessels are landing over-quota fish. Many of the Spaniards were unable to understand why the British have allowed the situation to arise despite the publicity surrounding the European court case. They say it would never have happened in Spain but perhaps they would have had a more devious method of getting around the whole problem. The real problem is that the UK has always had an "open" register and this was the position when entering the Community. The Commission would not let the UK "close" the register after entry. Other countries come in with "closed" registers.

There are obviously areas of common concern for both British and Spanish fishermen and it would seem appropriate to make a common approach to their respective Governments and to the Commission.

6.2 Fish Imports

A further issue raised at all the ports visited was that of imports of fish and sale through the central markets of the large Spanish cities such as Madrid, Barcelona, Zaragosa, etc. The port merchants and the catchers identified this as a problem that undermined and de-stabilised prices at the ports. There is a shortage of domestically landed fish in Spain (some 40% imported) and although there is recognition of the need for imports, it is thought that the appropriate way for them to be distributed is through the fishing ports and the auction system. In this way the prices and quantities could be controlled.

It was also claimed by the merchants that the distribution systems from the various ports was far superior to that of the central markets. In La Coruña, for example, they claimed that they could distribute fish to any part of Spain, including the islands, within hours of it being bought off the market. These are traditional markets that have been supplied by them for many years. The central markets only supplied a limited population.

The principal problem area was fish that was coming in from Russia and other Eastern Block countries, plus supplies from third world countries such as Namibia and Chile, much of which was air-freighted fresh, wereundermining the market.

It was felt strongly in all the ports visited that action should be taken by the Central Government to restrict and control imports as the unrestricted access to the Spanish market (the second largest in the world) caused fish to be dumped and an over-supply of certain species occurs at times. The European Commission had also been approached, presumably by fishing industry representatives, on the matter but they were of the opinion that there was insufficient product to supply Spanish demand.

The basic problem is, therefore, of uncontrolled imports de-stabilising fresh fish market prices with little interest by Central Government to intervene in the situation.

6.3 Future Expectations

On a number of occasions the question was posed to both catching and processing representatives as to what they expected to gain from the present and possible future negotiations with the European Union. The almost unanimous reply received was that they expected very little change in the present situation. The Spanish view is that they would continue to be at a disadvantage with the other Northern European fishing nations. Any changes, such as improved access for Spanish vessels to other EU waters, would be opposed by the other Member States. Their main need is to obtain better access into the waters to the west of the British Isles, ICES Areas VI and VII, however, there were low expectations as to whether there would be any change in the present regulations. There was a repeated assurance from Spanish representatives that they had very little interest in gaining access to the North Sea as the species mix in this area, apart from cod, were of a low priority on Spanish markets. They would like to see a relaxation of the days-at-sea rules that are imposed on their vessels and that they should be given more flexibility in when and where they fished, however, expectations were low. The view shared by most of the representatives was that the Spanish Government would make cosmetic attempts to improve "the lot" of the fishing industry but in reality little would change.

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Emillo Rodriguez	Port Wholesalers, Vigo
Jesus Espada	Xunta de Galicia
Fernando Freire	Vessel Owners/Wholesaler, Marín

APPENDIX I

AUCTION PRICES AT FIRST SALE IN LA CORUÑA ON THURSDAY 19TH MAY 1994

Area 7 Gran Sole Longline

SMALL HAKE - 2,900 - 1,300 - 890 - 550 pts/kg

LING - 15,600 - 7,200 pts/box (50kg)

Area 7 Gran Sole Trawled

SMALL HAKE - 54,000 - 46,000 - 35,000 - 26,600 - 16,800 pts/box (50kg)

MEGRIM - 47,700 - 32,500 - 23,000 - 14,000 pts/box (50kg)

COD - 25,500 - 21,800 - 17,400 pts/kg (50kg)

(BERTORELLA) - 29,800 - 16,500 - 6,600 pts/box (50kg)

MONK - 45,800 - 41,200 - 33,000 - 21,500 pts/box (50kg)

(SOLLOS) - 25,500 - 17,500 pts/box (50kg)

LING - 16,800 - 14,800 - 7,500 pts/box (50kg)

NEPHROPS - 75,000 - 52,700 - 33,000 - 20,000 - 10,800 pts/box (50kg)

APPENDIX II

QUOTAS FOR SPAIN FOR 1994

Quotas for Spain for 1994

Species	Zone		Quota (Tonnes)
Anchovy	VIII		27,000
Cod	I,IIb		11,500
Pollack	Vb, VI, XII, XIV		20
	VII		30
	VIIIa,b		440
	VIIIc		720
	IX, X; Copace 34.1.1 (EC zone)		430
		Total	1,640
Blue Whiting	Vb, (EC zone), VI, VII		20,000
	VIIIa, b, d		10,000
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		44,000
		Total	74,000
Whiting	VIII		2,000
Hake	Vb (EC zone), VI, VII, XII, XIV		9,940
	VIIIa,b,d,e		6,920
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		7,360
		Total	24,220
Jack & Horse Mackerel	Vb (EC zone), VI, VII, VIIIa, b, c, d, e, XII, XIV		31,000
	VIIIc, IX		39,270
		Total	70,270
Mackerel	II, Vb (EC zone), VI, VII, VIIIa, b, c, d, e, XII, XIV		20
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		30,140
		Total	30,160
European Plaice	VIIIc, IX, X; Copace 34.1.1 (EC zone)		120
Common Sole	VIIIa, b		15
Soles	VIIIc, IX, X; Copace 34.1.1 (EC zone)		755
Megrims	Vb (EC zone), VI, XII, XIV		550
	VII		5,400
	VIIIa, b, c, d, e		1,290
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		5,540
		Total	12,780
Anglerfish	Vb (EC zone), VI, XII, XIV		330
	VII		680
	VIIIa, b, d		810
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		10,830
		Total	12,650
Norway Lobster/ Nephrops	Vb (EC zone), VI		25
	VII		1,200
	VIIIa, b		410
	VIIIc		960
	VIIIc, IX, X; Copace 34.1.1 (EC zone)		625
		Total	3,220

EEC Total Allowable Catches by country for the Major Species 1983-1994
(Tonnes liveweight equivalent)

United Kingdom	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Cod	131,070	117,910	128,240	96,670	76,770	91,410	75,360	63,700	57,870	56,420	57,965	56,700
Haddock	145,410	140,840	159,070	179,520	127,420	157,380	83,190	56,220	48,580	53,225	92,400	105,015
Saithe	19,060	20,860	22,480	26,650	22,860	23,440	22,370	18,720	18,405	15,935	13,910	14,080
Whiting	90,200	79,480	86,600	74,730	74,520	67,400	65,110	45,995	46,255	42,430	46,165	46,070
Plaice	49,070	53,710	58,910	56,670	49,130	56,410	60,225	57,875	56,300	54,640	53,625	49,625
Mackerel	220,000	234,700	220,330	197,150	218,230	219,610	191,700	195,030	203,280	236,700	257,910	276,120
Nephrops	-	-	-	22,550	23,720	23,720	24,150	24,150	19,420	21,785	21,785	30,130
Herring	41,970	46,710	105,610	112,850	112,265	107,460	111,445	111,680	98,700	106,400	105,100	106,360
Common Sole	2,725	2,710	3,130	3,190	3,045	2,920	2,680	3,050	3,180	3,000	3,195	3,480
Anglers	4,000	4,000	7,090	7,810	7,810	8,600	8,600	8,600	8,600	8,600	6,110	5,980
Total	703,505	700,920	791,460	777,790	715,770	758,350	644,830	585,020	560,590	599,135	658,165	693,560

France												
Cod	35,280	36,390	39,820	28,370	27,240	32,200	31,440	29,265	30,230	24,925	23,870	23,450
Haddock	19,940	19,340	21,130	23,540	18,060	21,250	10,865	8,655	7,305	7,310	14,030	15,290
Saithe	64,340	69,850	74,840	87,690	76,250	79,630	75,430	64,050	59,710	49,385	41,515	42,035
Whiting	41,550	37,510	40,190	35,720	37,620	34,840	34,430	30,159	31,110	28,980	30,180	30,325
Plaice	6,930	6,840	7,425	6,485	7,610	9,260	10,095	9,205	9,465	8,700	8,010	8,160
Mackerel	16,000	17,100	18,330	15,650	17,550	17,550	15,240	15,385	16,510	19,170	20,890	22,550
Nephrops	-	-	-	-	13,310	13,260	13,570	13,590	10,915	11,425	11,435	11,460
Herring	2,040	6,450	37,270	41,670	42,190	37,670	39,770	35,470	32,450	36,620	36,620	37,210
Common Sole	5,070	5,090	5,730	6,010	7,095	6,825	6,915	7,465	7,905	7,680	8,035	9,220
Anglers	23,000	23,000	26,260	28,930	28,940	31,830	31,470	31,470	31,840	31,830	20,090	19,270
Total	214,150	221,570	268,995	274,065	275,865	284,315	269,225	244,714	237,440	226,025	214,675	218,970

Spain												
Cod	-	-	-	-	10,900	10,900	5,970	2,700	3,650	5,110	8,550	11,500
Haddock	-	-	-	-	0	0	0	0	0	0	0	0
Saithe	-	-	-	-	0	0	0	0	0	0	0	0
Whiting	-	-	-	-	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
Plaice	-	-	-	-	0	100	0	0	120	120	120	120
Mackerel	-	-	-	-	30,160	30,160	30,160	30,160	30,160	30,160	30,160	30,160
Nephrops	-	-	-	-	3,655	3,655	3,805	4,415	2,880	3,030	3,220	3,220
Herring	-	-	-	-	0	0	0	0	0	0	0	0
Common Sole	-	-	-	-	710	810	710	710	765	765	770	770
Anglers	-	-	-	-	12,780	13,050	13,050	13,050	13,050	13,050	12,750	12,650
Total	-	-	-	-	60,205	60,675	55,695	53,035	52,625	54,235	57,570	60,420

Denmark	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Cod	237,570	234,350	181,380	157,930	133,960	123,550	102,310	94,210	75,950	58,610	32,300	49,770
Haddock	17,880	18,615	21,450	24,980	18,770	20,140	10,765	9,865	5,185	5,465	7,290	13,890
Saithe	6,630	7,550	8,390	10,510	8,390	7,800	7,700	5,910	6,120	5,070	4,160	4,250
Whiting	36,880	34,190	35,980	33,000	28,450	26,670	26,070	22,370	23,560	10,860	8,750	11,890
Plaice	43,730	46,110	51,460	51,650	45,395	53,125	54,500	48,440	46,040	47,678	38,950	44,608
Mackerel	6,500	7,400	8,350	10,500	12,390	12,390	9,940	8,960	13,720	15,720	17,290	20,210
Nephrops	-	-	-	-	0	0	0	0	0	0	0	4,170
Herring	46,180	50,690	130,860	134,370	173,290	155,550	161,785	86,250	83,320	144,110	96,500	165,060
Common Sole	1,280	1,280	1,360	1,280	1,270	1,360	1,230	1,390	1,720	1,995	2,605	3,040
Anglers	0	0	0	0	0	0	350	350	0	0	0	0
Total	396,650	400,185	439,230	424,220	421,915	400,585	374,650	277,745	255,615	289,508	207,845	316,888

Germany												
Cod	87,800	84,380	69,310	56,750	50,640	48,835	38,530	34,080	32,770	25,420	19,950	24,130
Haddock	7,120	7,110	8,430	9,710	6,720	8,290	2,320	1,730	1,220	1,375	4,690	5,860
Saithe	18,760	21,110	23,230	28,570	23,230	22,250	21,640	17,050	17,020	13,955	11,405	11,625
Whiting	4,600	3,900	4,370	3,590	3,590	3,130	2,970	1,945	2,245	2,075	2,305	2,330
Plaice	8,900	9,860	10,830	10,340	8,740	10,370	10,940	10,560	10,270	10,110	10,070	9,220
Mackerel	24,000	25,600	24,330	18,080	24,300	24,300	21,170	21,520	22,550	26,240	28,610	30,670
Nephrops	-	-	-	-	0	0	0	0	0	0	0	20
Herring	22,440	26,530	70,530	78,970	80,295	71,240	75,225	66,080	103,490	118,670	133,300	146,900
Common Sole	1,360	1,360	1,500	1,365	980	980	975	1,690	1,840	1,725	2,215	2,240
Anglers	500	500	570	630	630	690	340	340	690	690	550	540
Total	175,480	180,350	213,100	208,005	199,125	190,085	174,110	154,995	192,095	200,260	213,095	233,535

Belgium												
Cod	9,150	8,230	9,330	7,010	5,400	6,860	5,800	5,080	4,530	4,460	4,345	4,245
Haddock	1,700	1,670	1,960	2,270	1,570	1,960	595	435	335	375	1,170	1,385
Saithe	80	80	90	120	100	90	100	80	80	70	80	80
Whiting	4,300	3,680	4,090	3,410	3,390	2,970	2,840	2,005	2,240	2,070	2,255	2,295
Plaice	11,080	12,030	13,225	12,885	11,395	13,290	14,240	13,510	13,150	12,650	12,325	11,565
Mackerel	0	100	330	450	470	470	380	340	520	600	660	770
Nephrops	-	-	-	-	0	0	0	0	0	0	0	680
Herring	0	1,570	9,120	9,625	9,680	9,190	9,365	8,840	8,520	8,950	8,950	9,020
Common Sole	3,910	3,710	4,035	4,510	4,380	3,895	3,710	5,315	4,930	4,595	4,870	5,290
Anglers	2,500	2,500	2,780	3,060	3,060	3,370	3,370	3,370	3,370	3,370	2,090	2,020
Total	32,720	33,570	44,960	43,340	39,445	42,095	40,400	38,975	37,675	37,140	36,745	37,350

Ireland	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Cod	11,720	11,520	11,520	11,720	11,350	11,520	11,720	11,720	11,040	9,825	9,830	7,755
Haddock	4,730	4,370	4,050	4,050	3,850	4,090	4,090	3,220	2,575	2,420	2,720	2,940
Saithe	3,060	3,060	3,060	3,200	3,760	4,790	4,670	4,640	4,515	4,455	4,420	4,420
Whiting	17,800	17,800	17,800	17,800	17,240	17,240	17,470	16,760	15,050	13,885	13,550	13,805
Plaice	3,070	3,070	3,270	3,170	3,295	3,410	4,340	4,020	3,575	3,405	3,205	3,270
Mackerel	80,000	85,300	80,000	75,000	79,350	79,350	69,280	70,550	73,370	85,440	93,090	99,590
Nephrops	-	-	-	-	9,315	9,315	9,805	9,805	7,185	7,535	7,535	7,545
Herring	27,960	27,170	32,880	38,940	38,920	33,440	44,810	52,050	47,830	53,740	53,740	53,740
Common Sole	585	555	555	595	625	370	1,050	990	735	715	665	730
Anglers	2,000	2,000	2,780	3,060	3,060	3,370	3,370	3,370	3,370	3,370	2,320	2,260
Total	150,925	154,845	155,915	157,535	170,765	166,895	170,605	177,125	169,245	184,790	191,075	196,055

Netherlands												
Cod	26,250	23,230	26,820	19,020	13,800	17,790	14,090	11,725	11,345	10,895	10,810	10,975
Haddock	1,120	1,120	1,340	1,560	1,040	1,330	305	205	160	200	800	950
Saithe	170	190	210	260	210	200	190	150	150	130	110	110
Whiting	10,190	8,630	9,670	7,950	7,920	6,880	6,540	4,425	5,105	4,680	5,175	5,265
Plaice	60,420	66,890	73,620	70,680	59,950	68,990	72,900	70,060	67,980	66,975	65,295	61,060
Mackerel	35,000	37,300	35,330	32,370	36,210	36,210	31,500	31,945	33,750	39,260	42,790	46,000
Nephrops	-	-	-	-	0	0	0	0	0	0	0	350
Herring	8,430	16,880	87,720	97,990	99,100	88,350	93,765	85,240	77,450	86,380	86,380	87,830
Common Sole	15,490	15,475	16,875	15,585	11,315	11,240	11,250	19,470	21,080	19,580	24,850	25,035
Anglers	500	500	570	630	630	690	690	690	700	690	530	520
Total	157,570	170,215	252,155	246,045	230,175	231,680	231,230	223,910	217,720	228,790	236,740	238,095

Portugal												
Cod	-	-	-	-	2,300	2,300	1,260	570	770	1,080	1,810	2,390
Haddock	-	-	-	-	0	0	0	0	0	0	0	0
Saithe	-	-	-	-	0	0	0	0	0	0	0	0
Whiting	-	-	-	-	2,640	2,640	2,640	2,640	2,640	2,640	2,640	2,640
Plaice	-	-	-	-	0	100	120	120	120	120	120	120
Mackerel	-	-	-	-	6,230	6,230	6,230	6,230	6,230	6,230	6,230	6,230
Nephrops	-	-	-	-	3,540	3,540	3,540	3,540	2,250	1,875	1,875	1,875
Herring	-	-	-	-	0	0	0	0	0	0	0	0
Common Sole	-	-	-	-	1,160	1,160	1,160	1,160	1,245	1,245	1,245	1,245
Anglers	-	-	-	-	1,990	1,990	1,990	1,990	1,990	1,990	2,160	2,160
Total	-	-	-	-	17,860	17,960	16,940	16,250	15,245	15,180	16,080	16,660

APPENDIX III

IMPORTS AND EXPORTS OF FISH AND FISH PRODUCTS

Spain - Table 1 : Imports of Fish and Fish Products for Human Consumption by Major Variety, January to December

	1991			1992			% Change	
FRESH, CHILLED OR FROZEN (excluding fillets):	Tonnes	Mill Pts	'000 Pts/T	Tonnes	Mill Pts	'000 Pts/T	Wt	Ave Price
Hake	94,984	33,219	350	72,101	30,013	416	-24	19
Tuna	98,558	11,700	119	49,507	7,588	153	-50	29
Cod	5,251	1,584	302	8,449	2,925	346	61	15
Anchovies	17,541	7,115	406	20,661	5,042	244	18	-40
Sole	11,215	7,072	631	12,730	8,548	672	14	6
Ling	1,507	276	183	1,935	425	220	28	20
Salmon	17,032	11,963	702	19,977	12,109	606	17	-14
Monkfish	10,146	6,263	617	10,747	6,872	639	6	4
Mackerel	12,887	836	65	14,136	849	60	10	-7
Sardines	33,011	1,034	31	25,234	754	30	-24	-5
Eels	520	1,929	3,708	460	2,588	5,626	-12	52
Livers & Roes	3,514	1,780	506	1,796	1,062	591	-49	17
Other	141,808	29,584	209	131,424	34,781	265	-7	27
Total	447,974	114,356	255	369,158	113,557	308	-18	21
FRESH OR FROZEN FILLETS:								
Fresh -								
Cod	2,726	1,400	513	2,812	1,790	636	3	24
Other	3,368	2,420	719	5,104	2,933	575	52	-20
Total	6,094	3,820	627	7,916	4,722	597	30	-5
Frozen -								
Hake	30,642	5,715	186	34,112	7,320	215	11	15
Plaice	763	375	491	641	300	468	-16	-5
Other	15,444	5,426	351	16,895	5,772	342	9	-3
Total	46,850	11,516	246	51,648	13,392	259	10	5
Total	52,943	15,336	290	59,564	18,115	304	13	5
DRIED, SALTED OR SMOKED:								
Cod	29,387	14,079	479	25,574	14,314	560	-13	17
Anchovies	6,669	1,487	223	9,455	2,223	235	42	5
Other	8,343	3,552	426	8,361	3,486	417	0	-2
Total	44,399	19,118	431	43,390	20,023	461	-2	7
SHELLFISH:								
Squid	51,774	9,575	185	31,788	9,731	306	-39	66
Shrimps & Prawns	82,009	56,751	692	82,581	57,362	695	1	0
Cuttlefish	28,886	6,391	221	36,532	10,174	279	26	26
Octopus	17,495	6,491	371	20,171	6,909	343	15	-8
Crabs*	9,441	3,296	349	11,030	3,841	348	17	0
Norway Lobster	6,293	6,512	1,035	6,694	6,230	931	6	-10
Oysters	2,933	843	287	2,977	889	298	2	4
Crawfish	725	1,262	1,739	845	1,524	1,804	16	4
Other	89,679	21,833	243	84,169	19,802	235	-6	-3
Total	289,234	112,953	391	276,787	116,462	421	-4	8
PREPARED OR PRESERVED FISH AND SHELLFISH:								
Fish	21,216	9,004	424	29,021	11,998	413	37	-3
Shellfish	21,235	11,533	543	21,891	13,066	597	3	10
Total	42,451	20,537	484	50,912	25,064	492	20	2
TOTAL	877,002	282,299	322	799,811	293,220	367	-9	14

* - Includes freshwater crayfish.
Source - Ministerio de Economia y Hacienda.

Spain - Table 2 : Exports of Fish and Fish Products for Human Consumption by Major Variety, January to December

	1991			1992			% Change	
FRESH, CHILLED OR FROZEN (excluding fillets):	Tonnes	Mill Pts	'000 Pts/T	Tonnes	Mill Pts	'000 Pts/T	Wt	Ave Price
Tunas	84,773	10,148	120	40,509	6,224	154	-52	28
Hake	12,649	3,143	248	17,054	3,520	206	35	-17
Sardines	6,361	549	86	5,457	446	82	-14	-5
Mackerel	1,741	139	80	1,216	89	73	-30	-8
Flounder	2,197	409	186	1,880	246	131	-14	-30
Eels	79	161	2,034	130	258	1,984	64	-2
Sea Bream	405	417	1,031	925	649	702	128	-32
Shark (ex dogfish)	192	129	672	549	414	753	186	12
Redfish	139	18	129	142	25	175	2	35
Other	83,493	15,893	190	60,781	14,420	237	-27	25
Total	192,029	31,007	161	128,642	26,291	204	-33	27
FRESH OR FROZEN FILLETS	6,323	2,452	388	6,321	2,797	443	0	14
DRIED, SALTED OR SMOKED:								
Cod	10,443	5,397	517	2,874	1,799	626	-72	21
Anchovies	3,241	2,461	759	2,244	1,334	594	-31	-22
Other	1,345	1,332	990	1,233	1,144	928	-8	-6
Total	15,030	9,190	611	6,351	4,277	673	-58	10
SHELLFISH:								
Octopus	41,984	11,373	271	41,158	10,449	254	-2	-6
Squid	21,615	3,166	146	26,307	4,359	166	22	13
Mussels	18,679	1,785	96	18,780	1,710	91	1	-5
Cuttlefish	3,158	726	230	2,923	739	253	-7	10
Shrimps & Prawns	1,908	1,936	1,015	3,707	3,277	884	94	-13
Other	8,043	1,307	162	6,671	1,528	229	-17	41
Total	95,387	20,293	213	99,547	22,063	222	4	4
PREPARED OR PRESERVED FISH:								
Sardines	1,983	743	375	1,855	843	454	-6	21
Tunas	11,957	5,873	491	9,787	5,311	543	-18	10
Anchovies	2,192	2,449	1,117	1,835	2,059	1,122	-16	0
Mackerel	460	233	506	535	277	518	16	2
Bonito	407	265	652	331	244	737	-19	13
Other	1,511	1,083	717	2,102	1,209	575	39	-20
Total	18,510	10,646	575	16,446	9,943	605	-11	5
PREPARED OR PRESERVED SHELLFISH:								
Crustaceans	190	121	640	314	188	598	65	-7
Molluscs	10,930	4,218	386	12,747	4,816	378	17	-2
Total	11,120	4,339	390	13,061	5,003	383	17	-2
TOTAL	338,399	77,928	230	270,368	70,374	260	-20	13

Source - Ministerio de Economia y Hacienda.

Spain - Table 1 : Imports of Fish and Fish Products for Human Consumption by Major Variety, January to December

	1989			1990			% Change	
FRESH, CHILLED OR FROZEN (excluding fillets):	Tonnes	Mill Pts	'000 Pts/T	Tonnes	Mill Pts	'000 Pts/T	Wt	Ave Price
Hake	74,177	23,466	316	84,242	26,039	309	14	-2
Tunas	58,269	7,679	132	119,746	14,806	124	106	-6
Anchovies	15,239	4,301	282	17,229	6,222	361	13	28
Sole	7,525	4,466	594	10,642	5,988	563	41	-5
Cod	6,521	1,858	285	5,187	1,665	321	-20	13
Ling	2,316	414	179	1,747	255	146	-25	-18
Mackerel	9,809	567	58	9,261	609	66	-6	14
Salmon	11,372	7,578	666	15,060	9,673	642	32	-4
Monkfish	5,470	3,155	577	7,081	4,046	571	29	-1
Sardines	37,690	209	6	49,123	548	11	30	101
Eels	549	2,451	4,465	641	2,346	3,661	17	-18
Livers & Roes	1,589	750	472	2,370	1,154	487	49	3
Other	104,859	21,560	206	121,445	23,901	197	16	-4
Total	335,384	78,454	234	443,774	97,252	219	32	-6
FRESH OR FROZEN FILLETS:								
Fresh -								
Cod	3,819	1,914	501	3,448	2,069	600	-10	20
Other	2,799	2,002	715	2,303	1,437	624	-18	-13
Total	6,618	3,916	592	5,751	3,506	610	-13	3
Frozen -								
Hake	17,839	2,846	160	20,828	3,731	179	17	12
Plaice	497	181	365	967	416	431	95	18
Other	8,279	2,723	329	14,625	4,125	282	77	-14
Total	26,615	5,750	216	36,420	8,272	227	37	5
Total	33,234	9,666	291	42,171	11,778	279	27	-4
DRIED, SALTED OR SMOKED:								
Cod	18,968	8,940	471	27,780	13,017	469	46	-1
Anchovies	9,562	2,568	269	8,912	1,975	222	-7	-17
Other	11,588	3,229	279	8,020	3,387	422	-31	52
Total	40,118	14,737	367	44,712	18,379	411	11	12
SHELLFISH:								
Squid	68,096	14,429	212	54,102	8,902	165	-21	-22
Cuttlefish	31,409	8,994	286	30,479	7,315	240	-3	-16
Shrimps & Prawns	59,468	42,231	710	71,098	46,267	651	20	-8
Octopus	12,538	3,639	290	12,184	3,772	310	-3	7
Crabs*	7,601	3,140	413	8,953	3,084	344	18	-17
Norway Lobster	5,290	4,965	939	6,368	6,310	991	20	6
Oysters	4,111	1,074	261	3,457	954	276	-16	6
Crawfish	1,110	1,588	1,431	837	1,439	1,719	-25	20
Other	67,620	14,802	219	63,740	16,397	257	-6	18
Total	257,243	94,863	369	251,218	94,440	376	-2	2
PREPARED OR PRESERVED FISH AND SHELLFISH:								
Fish	9,435	4,523	479	15,863	6,594	416	68	-13
Shellfish	22,338	9,470	424	23,106	10,222	442	3	4
Total	31,773	13,993	440	38,969	16,816	432	23	-2
TOTAL	697,752	211,714	303	820,844	238,664	291	18	-4

* - Includes freshwater crayfish.
Source - Ministerio de Economia y Hacienda.

Spain - Table 2 : Exports of Fish and Fish Products for Human Consumption by Major Variety, January to December

	1989			1990			% Change	
FRESH, CHILLED OR FROZEN (excluding fillets):	Tonnes	Mill Pts	'000 Pts/T	Tonnes	Mill Pts	'000 Pts/T	Wt	Ave Price
Tunas	48,093	18,819	391	61,280	11,313	185	27	-53
Sardines	6,622	776	117	8,203	941	115	24	-2
Hake	18,724	2,340	125	15,612	2,589	166	-17	33
Mackerel	1,126	474	421	1,441	107	74	28	-82
Flounder	2,449	368	150	2,191	325	148	-11	-1
Shark (ex dogfish)	35	38	1,086	76	59	776	117	-29
Eels	96	99	1,031	228	82	358	137	-65
Sea Bream	64	57	891	127	132	1,041	98	17
Redfish	9	2	235	206	32	155	>999	-34
Other	100,749	23,416	232	96,770	16,786	173	-4	-25
Total	177,968	46,389	261	186,135	32,367	174	5	-33
FRESH OR FROZEN FILLETS	9,487	1,731	183	7,360	1,897	258	-22	41
DRIED, SALTED OR SMOKED:								
Cod	5,108	2,618	513	10,553	5,005	474	107	-7
Anchovies	3,153	2,777	881	2,954	2,314	783	-6	-11
Other	1,832	1,157	631	1,825	1,235	677	0	7
Total	10,093	6,552	649	15,332	8,555	558	52	-14
SHELLFISH:								
Octopus	24,805	9,628	388	22,706	8,227	362	-8	-7
Mussels	24,267	2,127	88	16,587	1,484	89	-32	2
Squid	9,789	1,757	180	16,413	2,794	170	68	-5
Cuttlefish	6,971	3,031	435	6,078	1,877	309	-13	-29
Shrimps & Prawns	1,493	1,936	1,297	1,480	1,825	1,233	-1	-5
Other	6,957	1,328	191	8,891	2,188	246	28	29
Total	74,282	19,808	267	72,155	18,395	255	-3	-4
PREPARED OR PRESERVED FISH:								
Sardines	5,770	1,548	268	3,356	1,048	312	-42	16
Tunas	9,181	4,900	534	6,200	3,664	591	-32	11
Anchovies	2,544	2,653	1,043	2,496	2,315	928	-2	-11
Bonito	301	224	743	532	389	731	77	-2
Mackerel	1,365	521	382	822	381	464	-40	21
Other	1,250	732	586	1,390	907	652	11	11
Total	20,411	10,577	518	14,796	8,705	588	-28	14
PREPARED OR PRESERVED SHELLFISH:								
Crustaceans	1,908	1,183	620	324	218	672	-83	8
Molluscs	11,384	3,502	308	10,211	3,882	380	-10	24
Total	13,292	4,685	352	10,535	4,100	389	-21	10
TOTAL	305,533	89,742	294	306,313	74,019	242	0	-18

Source - Ministerio de Economia y Hacienda.

Spain - Table 1 : Imports of Fish and Fish Products for Human Consumption by Variety (Non-EC Countries Only), January to September

	1992			1993			% Change	
	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
FRESH, CHILLED OR FROZEN (including fillets):								
Hake	n/a	n/a	-	72,043	119,183	1,654	-	-
Tunas	n/a	n/a	-	45,844	34,007	742	-	-
Cod	n/a	n/a	-	1,993	4,209	2,112	-	-
Alaska Pollack	n/a	n/a	-	638	1,397	2,190	-	-
Dover Sole	n/a	n/a	-	5,610	13,226	2,358	-	-
Ling	n/a	n/a	-	168	352	2,095	-	-
Salmon	n/a	n/a	-	2,850	11,194	3,928	-	-
Monkfish	n/a	n/a	-	2,291	8,897	3,883	-	-
Mackerel	n/a	n/a	-	1,434	454	317	-	-
Sardines	n/a	n/a	-	521	370	710	-	-
Sea Bream	n/a	n/a	-	231	847	3,667	-	-
Livers & Roes	n/a	n/a	-	741	1,982	2,675	-	-
Plaice	n/a	n/a	-	354	478	1,350	-	-
Saithe	n/a	n/a	-	263	271	1,030	-	-
Greenland Halibut	n/a	n/a	-	221	280	1,267	-	-
Other	n/a	n/a	-	16,778	33,524	1,998	-	-
Total	n/a	n/a	-	151,980	230,671	1,518	-	-
DRIED, SALTED AND/OR SMOKED:								
Cod	n/a	n/a	-	17,478	60,215	3,445	-	-
Herring	n/a	n/a	-	24	44	1,833	-	-
Other	n/a	n/a	-	7,623	13,195	1,731	-	-
Total	n/a	n/a	-	25,125	73,454	2,924	-	-
SHELLFISH:								
Shrimps & Prawns	n/a	n/a	-	39,240	198,632	5,062	-	-
Crabs	n/a	n/a	-	512	1,709	3,338	-	-
Lobster	n/a	n/a	-	386	3,149	8,158	-	-
Norway Lobster	n/a	n/a	-	283	2,229	7,876	-	-
Crawfish & Rock Lobster	n/a	n/a	-	200	2,855	14,275	-	-
Squid & Cuttlefish	n/a	n/a	-	38,275	83,008	2,169	-	-
Octopus	n/a	n/a	-	12,400	30,204	2,436	-	-
Oysters	n/a	n/a	-	364	422	1,159	-	-
Mussels	n/a	n/a	-	609	1,438	2,361	-	-
Other	n/a	n/a	-	32,875	58,386	1,776	-	-
Total	n/a	n/a	-	125,144	382,032	3,053	-	-
PREPARED AND/OR PRESERVED FISH AND SHELLFISH:								
Anchovies	n/a	n/a	-	581	2,234	3,845	-	-
Tuna	n/a	n/a	-	128	300	2,344	-	-
Shrimps & Prawns	n/a	n/a	-	243	1,167	4,802	-	-
Molluscs	n/a	n/a	-	3,853	13,873	3,601	-	-
Others	n/a	n/a	-	7,344	22,415	3,052	-	-
Total	n/a	n/a	-	12,149	39,989	3,292	-	-
TOTAL	n/a	n/a	-	314,398	726,146	2,310	-	-

Source - Eurostat

Spain - Table 2 : Exports of Fish and Fish Products for Human Consumption by Variety (Non-EC Countries Only), January to September

	1992			1993			% Change	
FRESH, CHILLED OR FROZEN (including fillets):	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
Tuna	n/a	n/a	-	16,853	21,733	1,290	-	-
Hake	n/a	n/a	-	1,120	2,827	2,524	-	-
Sardines	n/a	n/a	-	2,470	899	364	-	-
Mackerel	n/a	n/a	-	62	32	516	-	-
Atlantic Halibut	n/a	n/a	-	4,822	12,077	2,505	-	-
Greenland Halibut	n/a	n/a	-	1,128	3,103	2,751	-	-
Sea Bream	n/a	n/a	-	4	18	4,500	-	-
Trout	n/a	n/a	-	123	416	3,382	-	-
Sprat & Brisling	n/a	n/a	-	292	143	490	-	-
Cod	n/a	n/a	-	137	679	4,956	-	-
Salmon	n/a	n/a	-	32	194	6,063	-	-
Other	n/a	n/a	-	2,233	12,032	5,388	-	-
Total	n/a	n/a	-	29,276	54,153	1,850	-	-
DRIED, SALTED AND/OR SMOKED:								
Cod	n/a	n/a	-	599	2,590	4,324	-	-
Salmon	n/a	n/a	-	16	325	20,313	-	-
Other	n/a	n/a	-	940	3,663	3,897	-	-
Total	n/a	n/a	-	1,555	6,578	4,230	-	-
SHELLFISH:								
Shrimps & Prawns	n/a	n/a	-	323	2,084	6,452	-	-
Crabs	n/a	n/a	-	12	63	5,250	-	-
Mussels	n/a	n/a	-	708	584	825	-	-
Squid & Cuttlefish	n/a	n/a	-	1,854	3,327	1,794	-	-
Octopus	n/a	n/a	-	2,615	5,104	1,952	-	-
Other	n/a	n/a	-	3,272	7,437	2,273	-	-
Total	n/a	n/a	-	8,784	18,599	2,117	-	-
PREPARED AND/OR PRESERVED FISH AND SHELLFISH:								
Anchovies	n/a	n/a	-	995	8,205	8,246	-	-
Bonito	n/a	n/a	-	327	1,741	5,324	-	-
Sardines	n/a	n/a	-	111	306	2,757	-	-
Tuna	n/a	n/a	-	67	192	2,866	-	-
Shrimps & Prawns							-	-
(canned + other)	n/a	n/a	-	40	201	5,025	-	-
Molluscs	n/a	n/a	-	1,826	7,798	4,271	-	-
Other	n/a	n/a	-	2,382	8,587	3,605	-	-
Total	n/a	n/a	-	5,748	27,030	4,703	-	-
TOTAL	n/a	n/a	-	45,363	106,360	2,345	-	-

Source - Eurostat

Spain - Table 3 : Imports of Fish and Fish Products for Human Consumption by Country of Origin (Non-EC Countries Only), January to September

	1992			1993			% Change	
	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
FRESH, CHILLED OR FROZEN (excluding freshwater fish):								
Chile	n/a	n/a	-	12,014	38,570	3,210	-	-
Morocco	n/a	n/a	-	5,864	12,478	2,128	-	-
Canary Islands	n/a	n/a	-	18,623	16,594	891	-	-
Namibia	n/a	n/a	-	28,637	44,498	1,554	-	-
Norway	n/a	n/a	-	264	986	3,735	-	-
Cyprus	n/a	n/a	-	1,470	869	591	-	-
U.S.A.	n/a	n/a	-	2,754	5,609	2,037	-	-
Argentina	n/a	n/a	-	25,636	27,783	1,084	-	-
South Africa	n/a	n/a	-	7,047	12,695	1,801	-	-
Panama	n/a	n/a	-	13,877	10,810	779	-	-
Mexico	n/a	n/a	-	3,201	2,321	725	-	-
Honduras	n/a	n/a	-	2,092	3,924	1,876	-	-
Ecuador	n/a	n/a	-	1,303	1,254	962	-	-
Taiwan	n/a	n/a	-	4,431	7,668	1,731	-	-
Russia	n/a	n/a	-	4,561	4,023	882	-	-
Uruguay	n/a	n/a	-	1,543	3,637	2,357	-	-
New Zealand	n/a	n/a	-	1,026	2,561	2,496	-	-
Mauritania	n/a	n/a	-	1,331	1,341	1,008	-	-
South Korea	n/a	n/a	-	1,069	1,200	1,123	-	-
Other	n/a	n/a	-	10,840	17,166	1,584	-	-
Total	n/a	n/a	-	147,583	215,987	1,463	-	-
DRIED, SALTED AND/OR SMOKED (excluding freshwater fish):								
Iceland	n/a	n/a	-	10,427	38,793	3,720	-	-
Norway	n/a	n/a	-	4,919	16,433	3,341	-	-
Argentina	n/a	n/a	-	5,405	9,342	1,728	-	-
Canada	n/a	n/a	-	1,081	2,502	2,315	-	-
Belize	n/a	n/a	-	723	1,521	2,104	-	-
U.S.A.	n/a	n/a	-	956	2,346	2,454	-	-
Other	n/a	n/a	-	1,611	2,490	1,546	-	-
Total	n/a	n/a	-	25,122	73,427	2,923	-	-
SHELLFISH:								
Morocco	n/a	n/a	-	24,490	69,159	2,824	-	-
India	n/a	n/a	-	11,680	27,543	2,358	-	-
Ecuador	n/a	n/a	-	9,624	49,770	5,171	-	-
Canary Islands	n/a	n/a	-	10,826	30,845	2,849	-	-
Argentina	n/a	n/a	-	10,317	37,581	3,643	-	-
Mauritania	n/a	n/a	-	7,824	20,902	2,672	-	-
Senegal	n/a	n/a	-	3,068	6,872	2,240	-	-
Russia	n/a	n/a	-	9,064	11,121	1,227	-	-
New Zealand	n/a	n/a	-	5,608	6,589	1,175	-	-
China	n/a	n/a	-	2,340	5,951	2,543	-	-
Tunisia	n/a	n/a	-	2,811	11,690	4,159	-	-
U.S.A.	n/a	n/a	-	2,844	6,422	2,258	-	-
Mozambique	n/a	n/a	-	3,076	18,935	6,156	-	-
Russia	n/a	n/a	-	9,064	11,121	1,227	-	-
Other	n/a	n/a	-	12,508	67,531	5,399	-	-
Total	n/a	n/a	-	125,144	382,032	3,053	-	-

PREPARED /

Spain - Table 3 : Imports of Fish and Fish Products for Human Consumption by Country of Origin (Non-EC Countries Only), January to September (continued)

	1992			1993			% Change	
	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
PREPARED AND/OR PRESERVED FISH AND SHELLFISH (excluding freshwater fish):								
Chile	n/a	n/a	-	2,386	10,193	4,272	-	-
South Korea	n/a	n/a	-	3,928	11,937	3,039	-	-
Thailand	n/a	n/a	-	3,572	8,099	2,267	-	-
Cuba	n/a	n/a	-	296	2,418	8,169	-	-
Morocco	n/a	n/a	-	636	2,306	3,626	-	-
Others	n/a	n/a	-	1,330	5,021	3,775	-	-
Total	n/a	n/a	-	12,148	39,974	3,291	-	-
FRESHWATER FISH:								
Norway	n/a	n/a	-	1,862	8,230	4,420	-	-
Chile	n/a	n/a	-	590	1,830	3,102	-	-
Kenya	n/a	n/a	-	961	1,970	2,050	-	-
Faroe Islands	n/a	n/a	-	187	792	4,235	-	-
U.S.A.	n/a	n/a	-	320	896	2,800	-	-
Tanzania	n/a	n/a	-	238	464	1,950	-	-
Others	n/a	n/a	-	243	544	2,239	-	-
Total	n/a	n/a	-	4,401	14,726	3,346	-	-
TOTAL	n/a	n/a	-	314,398	726,146	2,310	-	-

Source - Eurostat

Spain - Table 4 : Exports of Fish and Fish Products for Human Consumption by Country of Destination (Non-EC Countries Only), January to September

	1992			1993			% Change	
	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
FRESH, CHILLED OR FROZEN (excluding freshwater fish):								
Japan	n/a	n/a	-	6,544	28,066	4,289	-	-
U.S.A.	n/a	n/a	-	1,689	1,424	843	-	-
Taiwan	n/a	n/a	-	2,612	7,716	2,954	-	-
Senegal	n/a	n/a	-	5,175	2,745	530	-	-
Canary Islands	n/a	n/a	-	1,095	3,503	3,199	-	-
Ivory Coast	n/a	n/a	-	5,348	2,843	532	-	-
Russia	n/a	n/a	-	206	56	272	-	-
Chile	n/a	n/a	-	962	501	521	-	-
Hong Kong	n/a	n/a	-	257	1,536	5,977	-	-
Turkey	n/a	n/a	-	1,213	775	639	-	-
Ecuador	n/a	n/a	-	798	414	519	-	-
Thailand	n/a	n/a	-	878	376	428	-	-
Argentina	n/a	n/a	-	1,034	271	262	-	-
Other	n/a	n/a	-	1,210	2,169	1,793	-	-
Total	n/a	n/a	-	29,021	52,395	1,805	-	-
DRIED, SALTED AND/OR SMOKED (excluding freshwater fish):								
Canada	n/a	n/a	-	297	844	2,842	-	-
U.S.A.	n/a	n/a	-	502	1,640	3,267	-	-
Other	n/a	n/a	-	722	3,493	4,838	-	-
Total	n/a	n/a	-	1,521	5,977	3,930	-	-
SHELLFISH:								
Canary Islands	n/a	n/a	-	2,013	4,025	2,000	-	-
Japan	n/a	n/a	-	5,182	11,674	2,253	-	-
Argentina	n/a	n/a	-	246	376	1,528	-	-
Thailand	n/a	n/a	-	194	348	1,794	-	-
U.S.A.	n/a	n/a	-	162	379	2,340	-	-
Switzerland	n/a	n/a	-	123	524	4,260	-	-
Croatia	n/a	n/a	-	112	117	1,045	-	-
Other	n/a	n/a	-	752	1,156	1,537	-	-
Total	n/a	n/a	-	8,784	18,599	2,117	-	-
PREPARED AND/OR PRESERVED FISH & SHELLFISH (excluding freshwater fish):								
U.S.A.	n/a	n/a	-	1,736	6,621	3,814	-	-
Canary Islands	n/a	n/a	-	1,804	7,421	4,114	-	-
Mexico	n/a	n/a	-	306	1,703	5,565	-	-
Switzerland	n/a	n/a	-	592	4,582	7,740	-	-
Canada	n/a	n/a	-	164	1,245	7,591	-	-
Andorra	n/a	n/a	-	295	1,131	3,834	-	-
Japan	n/a	n/a	-	73	594	8,137	-	-
Others	n/a	n/a	-	771	3,645	4,728	-	-
Total	n/a	n/a	-	5,741	26,942	4,693	-	-
FRESHWATER FISH	n/a	n/a	-	296	2,447	8,267	-	-
TOTAL	n/a	n/a	-	45,363	106,360	2,345	-	-

Source - Eurostat

Spain - Table 5 : Imports and Exports of Fish Meal/Flour and Oil by Variety (Non-EC Countries Only), January to September

	1992			1993			% Change	
	Tonnes	'000 Ecus	Ecus/T	Tonnes	'000 Ecus	Ecus/T	Wt	Ave Price
IMPORTS								
Fish Meal/Flours	n/a	n/a	-	34,304	11,752	343	-	-
Fish & Marine Mammal Oil:								
Liver Oil	n/a	n/a	-	46	76	1,652	-	-
Others	n/a	n/a	-	0	0	-	-	-
Total	n/a	n/a	-	46	76	1,652	-	-
Fish Waste	n/a	n/a	-	19	23	1,211	-	-
TOTAL IMPORTS	n/a	n/a	-	34,369	11,851	345	-	-
EXPORTS								
Fish Meal/Flours	n/a	n/a	-	299	108	361	-	-
Fish & Marine Mammal Oil:								
Liver Oil	n/a	n/a	-	528	2,865	5,426	-	-
Others	n/a	n/a	-	0	0	-	-	-
Total	n/a	n/a	-	528	2,865	5,426	-	-
Fish Waste	n/a	n/a	-	287	81	282	-	-
TOTAL EXPORTS	n/a	n/a	-	1,114	3,054	2,741	-	-

Source - Eurostat

APPENDIX IV

COMMISSION OF THE EUROPEAN COMMUNITIES
REGIONAL, SOCIO-ECONOMIC STUDY IN THE FISHERIES SECTOR

ESPAÑA
Galicia, Asturias, Cantabria, País Vasco

XIV412/92

COMMISSION OF THE EUROPEAN COMMUNITIES
Directorate-General for Fisheries

Regional, Socio-Economic Study in the Fisheries Sector

ESPAÑA
Galicia, Asturias, Cantabria, País Vasco

MAIN CONTRACTOR

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ABSTRACT

The Regions covered by this study (the Autonomius Communities of Galicia, Asturias, Cantabria, Basque Country) supply 54% of Spain's total fishing boat crews (47,983 persons) as well as directly employing another 85,984 workers in activities relating to the fishing industry (aquaculture, processing, construction and repair of fishing vessels, etc.) yielding a total of 133,897 persons.

The study has considered 20 areas which are especially dependent on fishing and related activities. These areas supply 121,316 jobs and ECU 2,000m in gross added value, accounting for 14.0% of all jobs in the zones and 8.0% of all gross added value. Fishing represents 40% and 29%, respectively, of these figures. Landings carried out by Regional fleets amounted to 591,000 tonnes in 1990, of which 269,000 tonnes were landed by the deep-sea fleet and 322,000 tonnes by the midwater and coastal fleet. These landings represented 66% of the total domestic landings (78% of the landings by the domestic deep-sea fleet, and 59% of the landings by the domestic midwater and coastal fleet), and were performed by 11,249 vessels of 429,570 GRT (57% and 64% respectively of the Spanish fishing fleet), amounting to a value of approximately ECU 1,000m.

The proposed Community policy to reduce fleet and fishing activity would translate into a loss of direct and indirect jobs, which would mainly affect fleet personnel, but also the workers on land employed by shipowners and firms supplying sectors dependent on fishing activities (wholesale trade, transport, processing etc.) through to investment sectors (fishing boat builders, auxiliary naval industry, etc.).

In order to mitigate the effects of this job loss, a broad range of measures related to every collective and type of zone which they inhabit has been proposed; but, given the professional characteristics of the crew members that jeopardize their redeployment to other sectors without previous retraining, those measures of professional retraining (pre-professional, basic and specialized courses) must be emphasized as an unavoidable preliminary policy in order to facilitate this.

1.- INTRODUCTION

This report focuses firstly on the reasons necessitating this study, defining its objectives and delimiting the geographical and sectorial fields that are its concern according to the criteria laid down by the Contractor. (Chapters 2, 3 and 4)

Chapters 5-7 contain the information and analysis made in meeting the objectives of the project.

2.- REASON FOR THIS SURVEY

The present situation of imbalance between available fishing resources and the fishing capacities of the EEC will effect a hardening of the Common Fishing Policy (CFP) as from 1992. This change will affect the countries of the Community with varying intensity.

This policy, basically orientated to the reduction of the fleet and the catches, will produce significant economic and social consequences which will logically affect more intensely those areas strongly dependent on fishing and related activities.

Within the framework of these considerations, this report will identify the areas most seriously affected, using several indicators to define them, and will propose "auxiliary measures" designed to offset the projected loss of employment which would result from the implementation of the proposed Community policy.

CONTENTS

3.- OBJECTIVES

This responds to the following objectives:

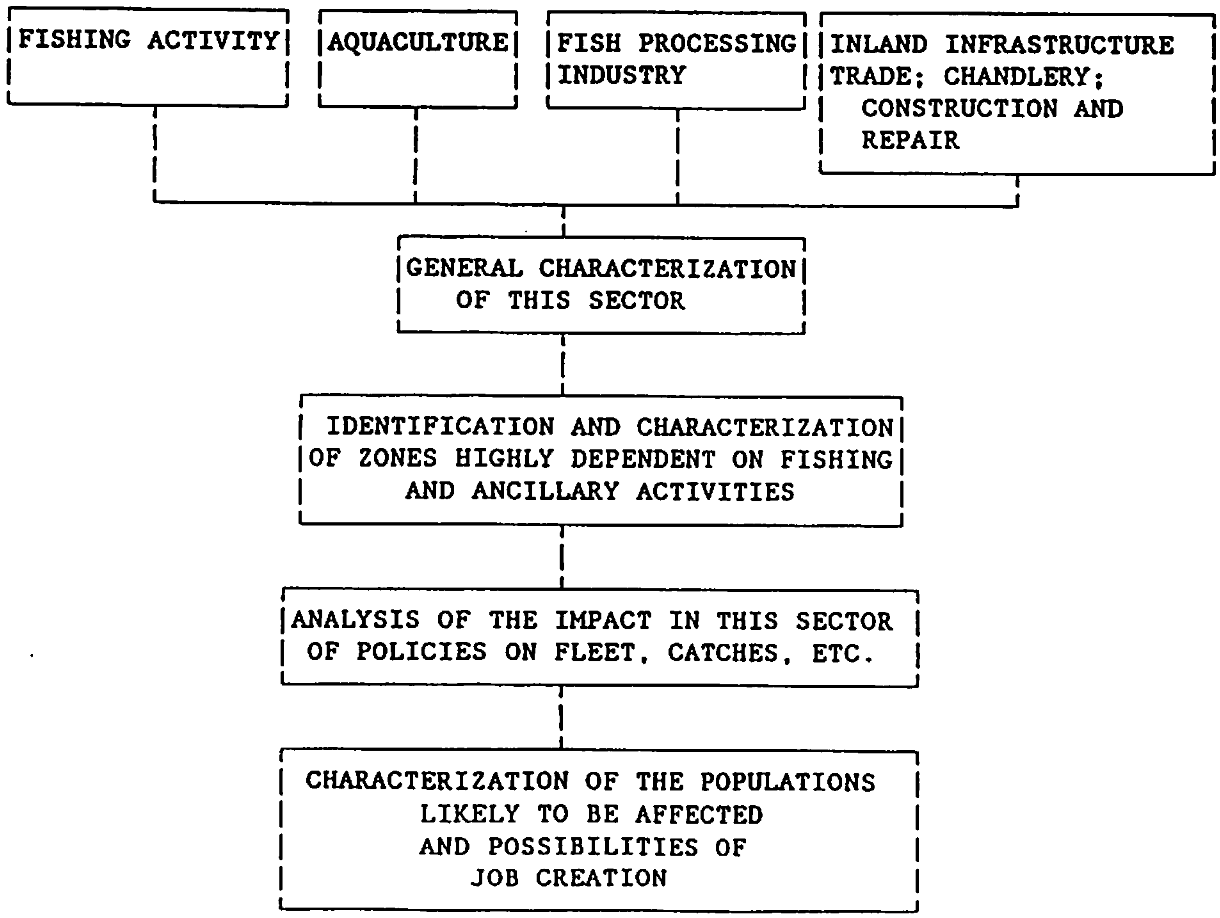
- Identifying and characterizing zones highly dependent on fishing and ancillary activities.

- Analyzing the socio-economic impact of a hardening of the Common Fishing Policy within the zones identified and characterized.

Defining the different measures, called "measures d'accompagnement" that the Commission should implement in order to solve the socio-economic problems stemming from the establishment of a Common Fishing Policy, and specially in order to generate alternative jobs for the fishermen and other people forced to quit their present jobs.

The chart shows the sectors surveyed and the order followed in the analysis of the information.

FIGURE Nº 1



4.- GEOGRAPHICAL AND SECTORIAL AREA

Region E.1 comprises, as defined in the survey contract, the following administrative units (Autonomous Communities):

- Galicia
- Asturias
- Cantabria
- Basque Country

A zone is a part of the Region where the economic and social activity is highly dependent on fishing and ancillary activities. The determination of the characteristics of these zones is the main aim of this survey.

The "extended zone" takes in some neighbouring population centres with significant industrial and services activities. This would be the target areas for policies of job creation.

The fishing and aquaculture sector, the focus of this survey, includes the catching and farming, maintenance, processing, conditioning and marketing of fishing and aquaculture.

Under the heading of "ancillary activities" are those activities dependent on the fishing and aquaculture sector, such as construction, maintenance and repair of fishing vessels and their equipment (gear, engines, electronic equipment, etc.), services and supplies to the vessels and breeding grounds, management and maintenance of fishing ports and their facilities, etc.

5.- GENERAL CHARACTERIZATION OF THE SECTORS OF FISHING AND RELATED ACTIVITIES

Table I contents show the basic information for this Region as a whole.

The activities reflected in these tables are:

Fishing sector

- Fishing activities
- Aquaculture and shellfish harvesting
- Processing industry (of goods derived from fishing and aquaculture)
- Marketing, storage and other activities of this sector

Ancillary sector

FIGURE 1

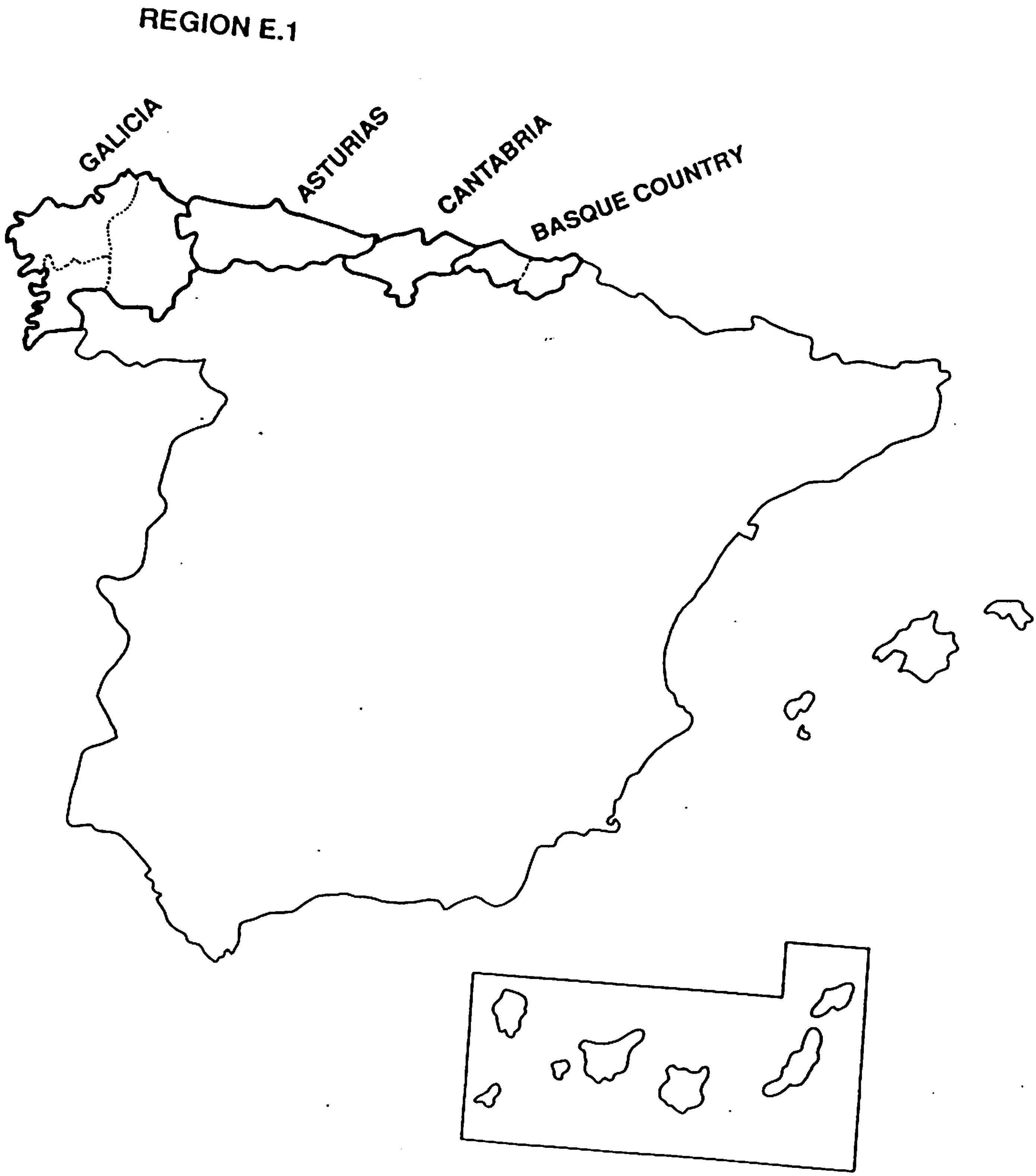


TABLE I
GENERAL CHARACTERIZATION OF FISHING AND ANCILLARY SECTORS (REGION E.1)

FISHING ACTIVITIES	REGION	% SPAIN
FISHING VESSELS		
. NUMBER OF VESSELS	11,249	57%
. GRT	429,570	64%
. ENGINE POWER (KW)	1,075,658	54%
. CREW	47,748	54%
CORPORATE SHIPOWNERS		
. NUMBER OF COMPANIES	7,200	43%
. NUMBER OF ONSHORE JOBS	3,150	30%
LANDINGS (1990)		
. VOLUME (thousands of tonnes)	591.0	66%
- DEEP-SEA	269.0	78%
- MIDWATER AND COASTAL	322.0	59%
. VALUE (millions of ECU)	978.6	52%
- DEEP-SEA	285.1	49%
- MIDWATER AND COASTAL	693.5	55%

AQUACULTURE AND SHELLFISH HARVESTING	REGION	% SPAIN
SALTWATER AQUACULTURE		
- COMPANIES		
. MUSSELS	2,000	99%
. OTHER MOLLUSCS	1,200	99%
. PURIFYING FACILITIES	59	86%
- EMPLOYMENT (permanent and temporary)	7,089	*
- PRODUCTION ADULTS (1990)		
. VOLUME (thousands of tonnes)	176.1	96%
. MUSSELS	170.0	98%
. OTHERS	6.1	63%
. VALUE (millions of ECUs)	105.4	81%
- PRODUCTION IN HATCHERIES (1990)		
. VOLUME (thousands of units)	75.1	31%
. VALUE (millions of ECUs)	3.2	17%
INLAND AQUACULTURE		
- COMPANIES		
. NUMBER OF COMPANIES	34	24%
. EMPLOYMENT (permanent and temporary)	115	24%
- PRODUCTION (1990)		
. VOLUME (thousands of tonnes)	5.1	29%
. VALUE (millions of ECUs)	13.8	29%
SHELLFISH HARVESTING		
NUMBER OF ONSHORE SHELLFISHERMEN	14,520	*

* No data available

PROCESSING INDUSTRY		
	REGION	% SPAIN
- NUMBER OF COMPANIES	210	53%
. CANNING	132	80%
. FROZEN GOODS, PREPARED FOODS & FRESH GOODS	54	39%
. DRYING AND SALTING	18	25%
. INDUSTRIAL USE AND NON-HUMAN CONSUMPTION	6	56%
- EMPLOYMENT (permanent and temporary)	10,405	58%
- PRODUCTION VOLUME, 1989 (thousands of tons)	356,000	58%
- PRODUCTION VALUE, 1989 (millions of ECUs)	1,192,3	58%

MARKETING, STORAGE AND OTHER ACTIVITIES OF THIS SECTOR		
	REGION	% SPAIN
INLAND INFRASTRUCTURE		
. NUMBER OF FISHING PORTS	131	54%
. NUMBER OF FISH-MARKETS	90	52%
. FISH REFRIGERATION CAPACITY	435.000M3	44%
HANDLING, STORAGE, DISTRIBUTION		
. TAX LICENSES, WHOLESALE TRADE	1.914	67%
. EMPLOYMENT	5.973	64%

ANCILLARY ACTIVITIES		
CONSTRUCTION, MAINTENANCE, AND REPAIR OF FISHING VESSELS	REGION	% SPAIN
- SHIPYARD LAUNCHINGS IN THIS REGION, 1990 (100 GRT) FOR THE NATIONAL MARKET	30	83%
. EXPORTED	6	15%
- NUMBER OF SHIPYARDS (100 GRT)	14	82%
- NUMBER OF SMALL AND REPAIR SHIPYARDS	37	*
- EMPLOYMENT	5,215	*
NAVAL GOODS TRADE		
- NUMBER OF TAX LICENSES	115	29%
- EMPLOYMENT	803	26%

* No data available

5.1.- Fishing

The Fishing Fleet

As of 1/1/91 data from the General Council of Fisheries showed a regional fleet consisting of 11,249 vessels with a tonnage (GTR) of 429,570 and 1,075,658 K.W., manned by 47,748 persons. This data reflects the active fleet (boats currently fishing), motorized and unmotorized.

With respect to Spain as a whole, the Region E.1 fleet makes up the following percentages: 56.6% ships, 63.9% tonnage, 54.4% KW, and 54.8% crew members.

Galicia, one of the four Autonomous Communities included in the Region has 83% of all vessels registered and 71% of regional tonnage.

The average tonnage and KW for boats in this Region is 38 tonnes and 96 KW respectively. The average number of crew members is 4.3. The Basque fleet greatly exceeds these averages while the Asturian fleet lies at the opposite extreme.

All 11,249 vessels registered in this Region can be classified into one of six broad categories.

Gill net vessels and longliners are most numerous (respectively, 2,988 and 2,976 vessels), after which come multipurpose vessels (2,565). The other three categories comprise a far lower number of vessels.

Trawlers, on the other hand, are ahead by GRT (they amount to 59% of the whole fleet GRT), following those that use bag-nets (19%) and longliners (16%). Gill net vessels, however, scarcely represent 3% of the whole fleet GRT. Trawlers, purse seiners and longline vessels together amount to 38% of the total number of vessels and 94% of the whole fleet GRT.

Trawlers, on average, have 359 GRT; purse seiners, 125; and longliners, 24 GRT.

Table II contents indicate that Galician vessels are most often small gill-net and all-purpose vessels; Asturian and Cantabrian vessels are, firstly, longliners and, secondly, gill net and all-purpose vessels. In the Basque Country longliner vessels predominate.

By GRT, trawlers and longliners are the most significant in Galicia; purse seiners and trawlers in the Basque Country; longline vessels and trawlers in Asturias, and purse seiners in Cantabria.

TABLE II

FISHING FLEET

COMMUNITY	TOTAL	TRAWLERS	PURSE SEINERS	LONGLINERS	GILL NETS	ALL PURPOSE	OTHERS
GALICIA							
Number of vessels	9,303	529	382	2,218	2,660	2,270	1,245
Tonnage (GRT)	304,845	207,933	29,955	47,409	9,973	7,470	2,105
Engine power (Kw)	718,104	390,227	90,576	134,814	50,910	40,212	11,360
Crew	34,490	10,121	3,493	8,129	5,397	5,295	2,055
BASQUE COUNTRY							
Number of vessels	894	132	202	361	66	127	6
Tonnage (GRT)	102,198	38,252	46,204	15,807	716	1,086	131
Engine power (Kw)	270,760	89,228	117,988	54,568	3,947	4,707	316
Crew	8,027	2,171	3,164	2,149	215	303	25
ASTURIAS							
Number of vessels	753	25	9	285	178	143	113
Tonnage (GRT)	11,061	3,767	597	4,323	1,601	490	282
Engine power (Kw)	46,829	9,541	1,920	20,776	8,899	3,811	1,877
Crew	3,088	316	98	1,327	591	509	247
CANTABRIA							
Number of vessels	299	16	61	112	84	25	1
Tonnage (GRT)	11,467	2,207	4,904	3,047	1,078	227	4
Engine power (Kw)	39,965	5,400	15,914	11,923	5,533	1,237	44
Crew	2,143	193	936	626	290	96	2
TOTAL							
Number of vessels	11,249	702	654	2,976	2,988	2,565	1,365
Tonnage (GRT)	429,571	252,159	81,660	70,586	13,368	9,273	2,522
Engine power (Kw)	1.075,658	494,396	22,398	222,081	69,289	49,967	13,597
Crew	47,748	12,801	7,691	12,231	64,937	6,203	2,329

SOURCE: S.G.P. (M.A.P.A.). Quoted from *Mar*, 287. September, 1991. (Data dated 1/1/1991).

Based on information taken from regional government censuses, the above table does not necessarily match the one produced by the S.G.P.: (8,712 vessels and 41,179 crews), 77% of the fishing fleet consists of small vessels of up to 20 GRT. These vessels (some 6,700) which are involved in coastal fishing, are manned by approximately 13,500 persons, a ratio of 2.0 persons per boat. It should also be noted that of these 6,700 vessels, close to 4,100 have up to 2.5 GRT.

Another 13% of the vessels, mainly engaged in midwater fishing, have between 20 and 250 GRT and account for 38% of all registered crewmen. These comprise approximately 1,130 vessels and 14,000 crew members, an average of 12.4 crew members per vessel.

There are approximately 900 vessels of over 250 GRT, concentrating mainly on off-shore fishing. They employ 13,700 crewmen, and an average of 15.2 crew members per vessel.

On the Autonomous Community level, the division of the fleet by GRT and length offers an approximate idea of the greater or lesser importance of the different types of fishing within each Community.

The following table was drawn up on the basis of information on the operative fishing fleet obtained from the General Council of Fisheries' January 2, 1991 census, (number of vessels), as well as data compiled by the regional governments based on the regional fleet census (1988/1990) between 1988 and 1990 (fleet structure based on tonnage and length).

TABLE III
DISTRIBUTION OF REGIONAL FISHING FLEET

	GALICIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	TOTAL
Up to 20 GRT	81%	89%	64%	29%	77%
Up to 250 GRT	8%	11%	36%	54%	13%
> 250 GRT	11%	--	--	17%	10%
TOTAL	100%	100%	100%	100%	100%
< 9 M Length	67%	66%	22%	13%	60%
9-18 M Length	15%	27%	46%	28%	21%
> 18 M	18%	7%	34%	59%	19%
TOTAL	100%	100%	100%	100%	100%

SOURCE: Own compilation based on regional government censuses (1988/1990) and General Council of Fisheries (1991)

Fishing fleet within the framework of the CFP

Since 1986, and following the directives issued in the EEC Ruling 4028/86, the Community has combined policies of renewal and modernization of fishing fleet with other policies of reduction of the number of vessels and tonnage of the fleet. The former have been implemented through EEC aid to those regions classified as Objective One. Between 1986 and 1990, EEC financial support has aided exclusively the construction and modernization of vessels longer than nine metres (twelve metres for trawlers) which meant the exclusion of an important part of the regional fleet. Nevertheless the Spanish subsidies have been mostly applied to those vessels excluded from EEC aid.

Some experts estimate that 20% of the fleet has been renewed thanks to this policy.

In order to implement the latter the final withdrawal from service of the vessels has been subsidized.

The modification of the above Ruling in December of 1990 (EEC Ruling 3944/90) has allowed access to Community subsidies of vessels whose length is between five and nine metres. Other measures have also been implemented to accelerate the reduction of the fleet, the exportation of vessels, and the setting up of joint ventures.

The above-mentioned measures were included in the Multiannual Guidance Programme for the 1987-91 fishing fleet, which was approved in March 1988. The programme established reduction objectives for the active Spanish fleet. By December 31, 1991, the overall tonnage had to stand at 588,590 gross registered tonnes (GRT) and 1860,689 KW which, with respect to January 1, 1987 meant a 6%

reduction in GRT and 5% in KW. The most affected fleets are those that fish in the domestic fishing area and in waters of third countries with whom they have fishing agreements.

The European Economic Community is now considering taking more action in this respect, even though it needs further data on the most affected fisheries and the fleets that operate in them.

To this end, the recommendations for preparing the Multiannual Guidance Programme for 1992-1996 insist on relating the type of fleet to specific species or groups of species so as to determine the objectives of the fishing effort system according to areas.

Fishing

The regional fleet, which is the largest in the EEC operates in Spanish, EEC and third country waters.

The fishing zones within Spanish waters are the Bay of Biscay, the Northwest coast, the southern part of the South Atlantic coast and the waters surrounding the Canary Islands.

As of 31/12/90 there were 2,011 registered vessels authorized to fish the waters north of Spain, mostly purse seiners (39%) and those using set longline techniques (31%).

The Galician fleet, by far the largest in the Region, participates in these expeditions using a variety of techniques. Line fishing is carried out in the coastal regions and in the Galician rias. These are 20 to 30 tonne vessels engaged in primarily sardine fishing, with mackerel, jack, etc. playing a secondary role in the catch. Trawlers (100-170 GRT), longline vessels and gill net vessels operating the continental shelf near the Galician coast bring a wide variety of species to market (sardines, horse mackerel, conger eel, octopus, mackerel, etc.). In addition to these, using lobster or other techniques, there is a large number of vessels of under 20 tonnes whose activity has a great economic and social impact on many coastal communities, depending on the catch.

Coastal fishing vessels in the Basque Country concentrate mainly on large tuna, anchovies and verdel. This is also the case in Cantabria, while the registered fleet for Asturias catches sardines, anchovies, horse mackerel, etc.

The Spanish waters under discussion support a considerable volume of fishing activity, although this is somewhat controlled by the requirement that vessels must register according to fishing techniques used in order to obtain permission to fish the different Spanish waters.

According to data gathered from specialists, the species which are most affected by overfishing are hake, megrim and monkfish.

Pollution is another factor influencing the deterioration of fishing grounds and causing stock reduction (smaller catch size and smaller fish).

The regional fleet fishes mainly in EEC zones VI, VII, VIII and IX .

Sardines, anchovies and tuna, etc. are captured in zone VIII, using 40 to 125 GRT purse seiners. 200 GRT trawlers and longline vessels operate in Zones VI and VII, capturing mainly hake and monkfish. Article 158 of the Treaty of Accession establishes that 300 vessels, included in a closed register, may operate in these zones until 1995, while only 150 of them may operate at any one time (CIEM Vb/VI: 23 vessels; CIEM VII:70 vessels; CIEM VIIIabd: 57 vessels). All but 5 are allowed to fish only demersals. Article 160 the Treaty authorizes specialized fishing activities all or part of the year, without restrictions on tuna fishing and allows for another 435 fishing anchovies, pomfrets and sardines. Fishing trips last for 21 days.

It is forecast that in 1992 the Spanish fleet will catch 326,402 tonnes of fish, of which 31% will be horse mackerel, 23% blue whiting, 10% anchovies and roughly the same percentage for mackerel.

Type of fish	Area	Quantity for 1992 (in tonnes)
Anchovies	VIII, IX	32,740
Pollock	Vb, VI, VII	1,210
	VbIIIab, VIIIc, IX, X	
Blue whiting	Vb, VI, VII, VIII abd	74,430
	VIIIc, IX	
Black wrasse	VIII	2,000
Hake	Vb, VI, VII, VIIIabde	29,610
	VIIIc, IX	
Horse mackerel	Vb, VI, VII, VIIIabde	101,270
	VIIIc, IX	
Mackerel	VIIIb, VIIIc, IX	30,160
Place	VIII, IX	120
Sole	VIII abcde, IX	855
Megrims	Vb, VI, VII, VIIIabde, VIIIc	19,740
	IX	
Monkfish	Vb, VI, VII, VIIIabde, VIIIc,	3,030
	IX	
Prawn	Vb, VI, VII, VIII ab	13,050
Cod	SV, 3M, 3NO, 2J3KL	18,187
Total		326,402

After the signing of the Accession Treaty, the following was established for Portuguese waters:

* Trawling: 18 vessels
* Longline fishing: 130 vessels
* Bluefin tuna: 150 vessels

The Guadiana agreements further establish a list of 30 vessels of various types authorized to fish the estuary. The 39 boats known as 'famelas', operating on the shores of the Miño, should be added to this list.

The deep sea and off-shore vessels operate in the waters of third countries. The following are the main fishing grounds:

* CECAF:

- Morocco: Trawling for hake and shrimp
- Morocco and the Sahara bank: sardines

- Sahara bank: cephalopods
- Mauritania: shellfish
- Mauritania: Trawling for fresh hake.
- Senegal, Gambia, Guinea Bissau: shellfish
- Nigeria, Cameroon, Western Guinea, Gabon: Trawlers and crustacean freezer processing ships

* ICSEAF:

- Angola: 300 GRT vessels. Crustacean fishing.
- Mozambique: Tuna. Freezer processing ships.

* Falklands and Patagonian Platform
- 800 to 1,000 GRT vessels catching mainly hake and squid.

* CIEM
- Cod fishing (Summer)

* NAFO
- 850 GRT vessels catching mainly cod and haddock.

* ICCAT
- State-of-the-art freezer processing ships

Resources within the frame of the CFP

The Treaty of Accession of Spain to the EEC established the procedures for access to Community waters, the number of vessels which could fish simultaneously in them and the percentage of participation in the TACs, complying with all conditions in force since 1986.

The EEC Ruling 3094/86, that established some technical measures for the preservation of the fishing resources, and Ruling 170/83, that instituted a common regime for conservation and management of fishing resources, have also determined the exploitation of those resources by Spain.

A fundamental aim of these measures has been to delimit fishing activity, matching the catches to the available resources.

The application of the rulings contained in the Commission Report of 1991 to the Council and to the European Parliament on the Common Fishing Policy have had only partial success due to inadequacies in the present system of resource management: coverage for TACs, multi-species fishing grounds, massive discards in the sea, effects on the environment, unoperative control measures, etc.

Present situation of the fishing activity

In 1990, 591,000 tonnes of fish and fish products were landed in this region, constituting 66% of total national catch. The estimated value of these catches was ECU 978,6 m, representing 52% of the national total.

In relation to the number of crew members (47,9833 data obtained from records at the Instituto Social de la Marina (Navy Welfare Institute), the average obtained is 12.3 tonnes and ECU 20,400.

The volume and value of the catch rose 9% and 26% respectively as compared to that of 1986.

Midwater and coastal fishing account for 54% of the overall volume of saltwater fishing and 71% of its total value. This Region's ports receive 59% of the national volume, but only 55% of the value.

Some 37,215 crewmen man the midwater and coastal fishing boats. Thus if 322,000 tonnes is unloaded at port, this comes to 8.7 per crew member, which is 30% below the 12.3 figure for the entire Region. The pro-rata catch value (ECU 693.5 m/37,215) is ECU 18,650.

Some 10,045 vessels with an average crew of 3.7 participates in this type of fishing.

The subregion of Galicia registered midwater and coastal catches of 216,000 tonnes, worth ECU 432.8 m. This means Galician ports unload 67% of all the regional catch, but only 62% of the overall value. For Pontevedra, Coruña and Lugo, the three coastal provinces making up this subregion, the first two account for 92% of volume of catch and 89% of value. In 1989 demersal fish constituted 49% of all midwater and coastal catches in this subregion with pelagic species representing another 43%, the main species being hake/whiting, sardines, tuna, horse mackerel and blue whiting.

The Cantabrian subregion, which is made up of the provinces of Asturias, Cantabria, Vizcaya and Guipúzcoa, brings in 106,000 tonnes of the type of fish studied, which is worth ECU 260,7 m, some ECU 2,459 per ton (23% above the same ratio for the subregion of Galicia). The largest catches (1990 data) are brought in by Vizcaya (35,475 tonnes), with the three remaining provinces bringing in similar quantities between them: Guipúzcoa (25,167 tonnes), Asturias (23,977 tonnes) and Cantabria 21,896 tonnes)

The highest value per ton unloaded is registered in Guipúzcoa (ECU 3,091 per ton).

Pelagic fish clearly predominate in the overall midwater and coastal catches unloaded in this subregion (76%) (1989 data).

The main species landed are anchovies, tuna, horse mackerel, mackerel, with the following distribution respectively for 1990: 22,908 (22% of total), 19,462 (18%) and 13,465 tonnes (13%).

Other significant species are 'verdel' (10,943 tonnes), sardines (8,626 tonnes), hake (6,987 tonnes) and whiting (3,253 tonnes).

Deep-sea fishing brought in some 269,000 in 1990 worth ECU 285.1 m, or ECU 1,060 per ton (as compared with 2,140 by midwater and coastal fishing).

Some 10,768 persons man the 1,204 deep-sea fishing boats (8.5 crewmen per boat). This, related to the figures for catch unloaded, is 25.0 tonnes and ECU 26,480 per crew member.

A few ports in Pontevedra and Coruña receive 100% of all deep-sea fish caught. Out of 269,441 tonnes, 74% arrive at Pontevedra ports (basically Vigo). In terms of value, the ECU 285.1 m are divided 65% and 35% respectively between the provinces of Pontevedra and Coruña.

Demersal fish represented 41% of volume of midwater catch unloaded in 1989, pelagic fish accounted for 39% and mollusc/crustaceans made up the remaining 20%. Hake/whiting, tunas, cephalopods and cod were the most significant species.

The fundamental problems faced by the fishing activity in this Region, as is the case for the rest of Spain and the other countries in the EEC, is the progressive reduction of fishing possibilities.

This situation has led to the existing fishing fleet being considered too large for the different countries in the EEC in relation to their zone of operation.

In percentage indicator terms (number of vessels, GRT, sea-going ersonnel) Spain, and this Region especially, should not be greatly affected, ut the situation changes when absolute figures are considered due to the ignificant role of the Spanish fishing fleet in the fishing activity of the ommunity as a whole.

In general terms, vessels operating in coastal waters, commonly known as "the craft fleet", could be the most affected in the future. Overfishing and industrial pollution of these waters is seen to significantly reduce the total percentage of landings. As the landed tonnage/person rate is substantially lower than in the other fishing activities the negative effect on employment and the economy of several coastal townships can be predicted as being severe. An aggravating factor is that the skills required in this activity cannot easily be deployed in other types of activity.

Other forms of fishing activity will also be affected in the future by a reduction in the possibilities of fishing to a greater or lesser degree, depending on the kind of fleet and the fisheries where they operate. Most likely these reductions will affect midwater fishing more than deep-sea fishing because the latter has access to exploitation of new species, alternative, less exploited fisheries, etc.

This sector as a whole has suffered difficulties caused as much by a reduction in catches due to the exhaustion of the fishing grounds as by the limitations of access to its traditional fisheries.

TABLE IV
LANDED AMOUNT 1990 (TONNES)

ZONES	DEEP-SEA	MIDWATER & COASTAL	FARMS	SEAWEED & SARGASSO	TOTAL
RIA OF VIGO	171017	54755	12562	222	238556
RIA OF PONTEVEDRA	7264	12194	3594	4	23056
RIA OF AROUSA	22106	17807	39911	6	79830
PROVINCE OF PONTEVEDRA	200387	84756	56067	232	341442
RIA OF AROUSA	48175	24865	12724	135	85899
RIA OF MUROS AND NOIA		10973	2883	5	13861
RIA OF CORCUBION		584		53	637
RIA OF CAMARIÑAS		1776		188	1964
RIA OF LAXE		7051		122	7173
RIAS OF CORUÑA AND BETANZOS	20879	66902	1735		89516
ESTACA DE BARES		2850	4		2854
PROVINCE OF LA CORUÑA	69054	115001	17346	503	201904
LUGO COAST		16223		585	16808
PROVINCE OF LUGO		16223		585	16808
TOTAL GALICIA	269441	215980	73413	1320	560154
VALDES		786		29	815
AVILES		18479			18479
GIJON		4712			4712
ASTURIAS		23977		29	24006
CANTABRIAN COAST		21896	72		21968
CANTABRIA		21896	72		21968
GREATER BILBAO		63	1		64
BERMEO		10167			10167
ONDARROA		25245			25245
PROVINCE OF VIZCAYA		35475	1		35476
DONOSTIA		14495			14495
GUETARIA		10672			10672
PROVINCE OF GUIPUZCOA		25167			25167
TOTAL CANTABRIAN COASTLINE		106515	73	29	106617
TOTAL REGION E.1	269441	322495	73486	1349	666771

SOURCES: MAPA and Regional Fishing Councils

NOTES: 1) DEEP-SEA: Frozen fish + green cod
MIDWATER & COASTAL: fresh fish
2) PARKS & FARMS: Products used in the industry are not included

Apart from the necessary securing of reasonable agreements in order to guarantee the activity of the Regional and Spanish fleet, an alternative measure for obviating most of these difficulties has been the constitution of joint ventures with non-EEC countries for securing safer and easier access to non-EEC fisheries.

5.2.- <u>Aquaculture and shellfish harvesting</u>

In Region E.1 saltwater and continental aquaculture reached production levels of ECU 122,4 m in 1990, 73% of the national total. 86% of this figure corresponds to saltwater aquaculture, with 54% applying specifically to mussels.

In 1990, 176,118 tonnes of saltwater aquaculture products for consumption or processing were obtained, with the following distribution: 170,000 tonnes of mussels, 2,740 tonnes of flat oysters, 2,175 tonnes of clams, 224 tonnes of other molluscs, 570 tonnes of turbot and 355 of salmon.

In addition to this, 75 million units of mollusc seed and fish larvae were harvested.

Saltwater aquaculture development has been constant in the Region E.1 since the outset of the former Multiannual Guidance Programme (1987-1991), with the exception of mussels production, whose figure for 1990 is only 70% of the average figure for the period 1985-1988.

Production increase (for adults) has exceeded the forecast for 1991 in some species (clam, salmon); in others (for instance, turbot) it has not, but it has been significant.

Strong growth was also registered in larvae (fish), broods (crustaceans) and seeds (molluscs) although the projected harvests for 1991 were exceeded in only the first case.

Trout production and other species of inland aquaculture have kept stable.

Saltwater and continental aquaculture directly employs some 7,100 persons, 2/3 of whom are in full-time positions. 83% of all jobs correspond to mollusc farming sectors, mainly mussels. Mollusc farming employs some 3,200 family businesses (2,000 of these only raise mussels).

The Multiannual Guidance Programme (1992-1996) has been conceived on the same guidelines as the former, establishing with respect to sea species two levels of priority for different species, and limiting itself to three species of inland aquaculture.

The wonderful natural setting, the maintenance and diversification of demand (except for the products of inland aquaculture) and the investment made favours recovery in mussel production and the continuance of growth for the other species.

Obstacles to this development proceed mainly from the environmental situation, due as much to the activity's effect on it as to its pollution by other industries. This issue is being controlled through legislation.

On the other hand, to secure the production of fry and seed has been and still is essential for the development of this sector.

In short, it can be said that this is a subsector with a bright future though, logically, always playing a secondary and complementary role to the main fishing activity, with a very limited capacity to absorb workers diverted from other sectors.

The fundamental problem regarding shellfish harvesting in Galicia, though not exclusive to this location, arises from the need to sustain rational exploitation. This is done through polices professionalising the harvesting workforce, fixing minimum sizes for the harvested species, and, finally, implementing policies that allow for appropriate preservation and development of the resources.

5.3.- Processing industry

During the eighties this sector, both in Region E-1 and Spain as a whole, experienced an intensification of industrial concentration, accompanied by a sharp decline in the number of companies and jobs which fell to its lowest point in 1985. Since then production has recovered and current figures register above those at the beginning of the decade.

Now, this trend corresponds also to that experienced by the most important subsector, preserved and semi-preserved goods. The subsectors of processing frozen goods and prepared dishes have evolved positively, helped not only by changes in consumption but by the scarcity and rising prices of the fresh product. Nonetheless the presence of this activity in this Region is less significant than preserved and semi-preserved goods because the processing factories are utilized located close to the big consumption centres (Madrid, Barcelona, etc.).

There are 210 companies involved in fish processing or aquaculture products in this region (53% of the national figure, 396 companies). Of these, 204 process foods for human consumption. The majority of them (132 concentrate mainly on the production of canned goods, preserved or semi-preserved food). By geographical area, the largest number of companies is concentrated in Galicia (119) with Cantabria a distant second (51).

The observed trend for the eighties indicates a decrease in the number of companies, from 350 in 1980 to 210 in 1989, due to lockouts or mergers in the canning and drying and salting sectors, caused by several factors, including outdated industrial organization, rising input costs and imports. This decreasing trend would have been steeper has it not been for an increase in the number of companies involved in freezing processing as a partial result of increased consumer demand the number of concerns fell most sharply in Galicia, from 178 to 119.

The majority (22 out of 25) of the most important companies in the sub-sector of canned goods is located in this region, including the top ten. It is an activity dominated by family business, with scant foreign investment and marked fragmentation in comparison to other European countries. Nevertheless, the top ten process almost half the annual production of canned fish. Except for the most important among them relationships with shipowners are not frequent, although a process of increasing integration is on the way.

Companies engaged in semi-preserved anchovies, concentrated in Cantabria, are family businesses of middle or small size. They are very dependent on highly variable seasonal catches, which obliges them to partially rely on imports.

The frozen products processing sub-sector is widely dispersed over the whole country because the companies and their facilities tend to locate close to the big consumption centres. Nonetheless, some companies with an important proportion of the national production are located in this region.

These companies are highly integrated, in the catching sector through different types of relationships: corporate shipowner property, joint ventures with foreign companies, or with other national companies to fund shipowner companies, etc. On the other hand, the biggest companies participate not only in wholesaling but also in retailing to small shops, and they produce processed goods together with pre-cooked or prepared dishes. This sub-sector is also integrated with medium size and small companies -often constituted as processing rooms, producing frozen goods of different degrees of processing, although they also process fresh goods. Their number has risen in recent years following the increasing demand for frozen products.

Finally, drying and salting companies, a declining sub-sector due to increasing difficulties in obtaining raw materials. Most of the companies are still based on craftwork and they are often linked to wholesalers. The most important companies (located in Coruña, Pasajes, and Irún) have their own fleets or are integrated in cartels with some catching involvement.

The product processing industry comprising fishing and aquaculture registered permanent and seasonal employment figures of 10,405 individuals in the Region (1989), 58% of the national total. Employment fell sharply in the eighties both in the country as a whole (30% less) and in the Region (40% less). Galicia accounts for about two thirds of the employment in this industry in the area which we are researching.

The industry of preserved and semi-preserved canned goods registers the highest rate of temporary employment (estimated at 25% of the jobs), due to the seasonality of the catches of anchovies, tuna fish, mussels, sardines, etc. The same phenomenon, and for similar reasons, occurs in the sub-sector of fresh fish processing and the drying and salting industry, though to a lesser degree.

In contrast, the industry processing frozen goods is the one with the lowest proportion of temporary employment, due to the preserving method, and also to the fact that by operating in different seas they secure the regularity of raw material inputs.

In the 1980's the processing industry was faced with a growing scarcity of raw material, a need which it has filled by imports. Between 1980 and 1990, the imported raw materials rose from 10% to 20% of the tonnes consumed by this sector.

Hake and marlin species imports are significant. In 1989 the regional fleet supplied 53% of the volume consumed by the freezing and processing industry. The same is true of the tuna family, where 14% of all raw material used in the canning and packing industry came from third countries. Third imports of cephalopods, crustaceans, anchovies, etc. are significant.

To sum up, this is an activity suffering job reductions due to the following factors:

- Scarcity of raw material
- Need of resources for modernization
- Political and administrative limitations to its export activity

Furthermore, companies do not fully utilize their capacities due to several factors, including the importation of foreign products, etc.

Regarding canned goods in particular, Portugal and Morocco enjoy advantageous trading conditions, which, in the general opinion, has contributed in this sector to a decline in Spain´s export to the EEC market.

The basic guidelines of Community policy regarding the processing sector try to increase the competitiveness of the companies to adjust their processes of production to the new needs of demand and to develop new companies (except for sardine canning). (Community Aide Scheme for Spain. Procèssing and marketing of fishing products. Objective 5(a). 1991-1993).

The specific investment is directed to the technological modernization of processing and packing machinery and equipment, improvement in storage and raw material handling rooms, quality of equipment and hygienic-sanitary control, etc.

5.4.- Inshore infrastructure, handling, storage, distribution

The 131 ports along this regions coastline are distributed by Autonomous Community as follows:

. GALICIA	86
. ASTURIAS	19
. CANTABRIA	8
. BASQUE COUNTRY	18
. TOTAL	131

Ten of these ports are considered of national interest and consequently are ruled by the Central Administration and managed by its respective Council of Port Works. The others belong to the Autonomous Administrations jurisdiction.

The policies of the different administrations have as a frame of reference the Programme for the Improvement and Adaptation of Facilities of the Spanish Fishing Ports, 1989-1993 (EEC Rulings 4028/86 and 2321/88). The investment allotted to the Region in these four years amounts to ECU79,6m, 54% of the figure corresponding to Galicia, basically directed to improving the conditions of the subsidies for fishing vessels, refrigeration facilities, building and ice provisioning.

In these 131 ports there are about 90 fish-markets, 53 of them (59%) being located in Galician ports. These markets are managed by fishermen´s unions ("guilds"), shipowners, fishermen's cooperatives or other groups. Operations of trading, handling and storage of fish products are commonly undertaken in those which are more modernized.

The 90 markets, spread over 53,228 square metres (i.e., an averag surface of 591 square metres), have an annual trade of approximately 343,000 tonnes (average for 1986-1988). This class of fish-market deals basically in fresh fish.

About 80% of the surface occupied by fish-markets in this region is located in the main 10 ports, Pasajes, Vigo and Coruña -in that order- being the most important. The three of them together make up approximately half the surface occupied by fish-markets.

Handling, storage and distribution of fishing and aquaculture products.

The processes and agents involved differ according to the product in question (fresh, frozen or from aquaculture settings).

Landed fresh fish products initially go to fish-markets to be sold. There they are classified by species and size and part of them is transferred, under controlled temperatures, to outhouses called processing rooms. According to information from the General Directorate of Ports, infrastructures dealing with fish handling and canning cover a surface of 41,132 sq. m in those 10 ports that concentrate on the majority of landings.

The commercial wholesalers, operating in these fish markets buy the products by auction to send later to central or local markets, processing factories, etc. Information about the number of fresh fish trading companies is scarce.

Owners personally manage their own business in 85% of all companies. 95% of the companies are family ventures with hardly any formal structure and an extremely low level of mechanization (80% of all tasks are manual).

The main problem for port wholesale trade in this region (and in the rest of Spain) is the lack of storage facilities equipped for fish classification, processing, packing and preservation (or the insufficiency of the existing ones). Other problems are related to the packs and cans used. The Sectorial Plan for 1990-1994 has directed research into these problems and also to other aspects such as access to the settings, parking areas, road traffic, etc.

Marketing at destination point takes place basically in three operating centres:

- Traditional wholesale central markets
- Wholesale markets belonging to the Mercasa Network - modern settings where most fish destinated for the big urban areas is marketed -
- Independent traders and wholesale importers who buy the fish in the original port and sell it to shop-keepers.

The total figure for people employed in wholesale trade at destination point should be 4.000. Nonetheless, only 60% of marketed fish products come from this region. Therefore, to be precise, only 2,400 of these people can be said to be employed in marketing fish products from this region.

Frozen products marketing networks differ very much from those for fresh products. Big fishing companies have often created subsidiaries wholesaling at destination point, participate in processing factories, handling rooms, etc., or have reached agreements to operate jointly. Producer organizations play an important role in the marketing of some species from point of origin.

Frozen products go to following destinations:

- Frozen tunafish (mainly yellowfin tuna and striped tuna) are almost all consigned to the canning industry.
- Frozen cephalopods (mainly squids, shotfin squids, and octopuses) are most often directed to sea products processing rooms.
- Frozen hake destinations are divided between processing rooms and direct consumption.
- Frozen seafood goes mainly to direct consumption.

Companies marketing frozen goods located in this Region are concentrated around the port of Vigo.

According to available information (CAMERDATA), there are 1,914 tax-licenses registered in this region (legally allow wholesaling operations in fresh, frozen, salted fish, etc.). The employment calculated for these companies amounts to 5,973 people. It must be taken into account that 51% of the licensees are independent operators, as against companies.

	REGION E.1	% SPAIN
Number of tax licences for wholesale marketing	1,914	30%

5.5.- Ancillary activities

Construction and repair of vessels has a strong presence in this Region, shipyard production being orientated mainly to the national market.

At present the companies producing vessels of more than 100 GRT try to divert their production to other countries.

About 17 out of 32 existing shipyards launched fishing vessels bigger than 100 GRT, amounting to 53,304 GT.

In 1990, shipyards in Region E.1 produced 30 of the 36 fishing vessels sold to the national market, and 36 of the 39 vessels exported.

During the second half of the eighties this subsector has carried on important construction and modernization of the Spanish fishing fleet (thus effectively reducing its average age) thanks to subsidies offered jointly by the EEC and the Spanish administration.

In this context, ECU137.8m were designated for construction and modernization of vessels between 1986 and 1990, 53% of which was allocated to region E.1. This aid amounted to 25% of the previous budget. It must be pointed out that between 1986 and 1990, 104 construction projects were subsidized amounting to a total investment of ECU 182.5 m (averag investment, 18 million), and also 498 modernization projects amounting to an investment of ECU 115.3 m. Galicia received substantially more aid and had more projects approved than any other autonomous Community.

To these investments, co-financed by the EEC, must be added nationally subsidized Spanish entrepreneurship orientated to vessels of less than 9 metres in length. It is estimated that these investments have amounted to ECU1,538.5m in the last five years (545.3 million from the EEC).

These special national subsidies are justified because EEC subsidies excluded small vessels, which constitute the majority of the Spanish and regional fishing fleet. The modification in 1990 of EEC Ruling 4028/86 opens new perspectives, because the Community participates now in subsidies to vessels shorter than nine metres in length (a minimun of five metres for construction and ECU3,846 for modernization), financing them through the structural funds.

Concurrent with modernization of the EEC fishing fleets (which is to go ahead for some time), has been the proposal, since 1986, concerning the viability of progressively reducing the number of vessels, establishing tasks of annual reduction for every country. Some policies have been implemented with this aim as, for instance, subsidies for definitively leaving fishing activities.

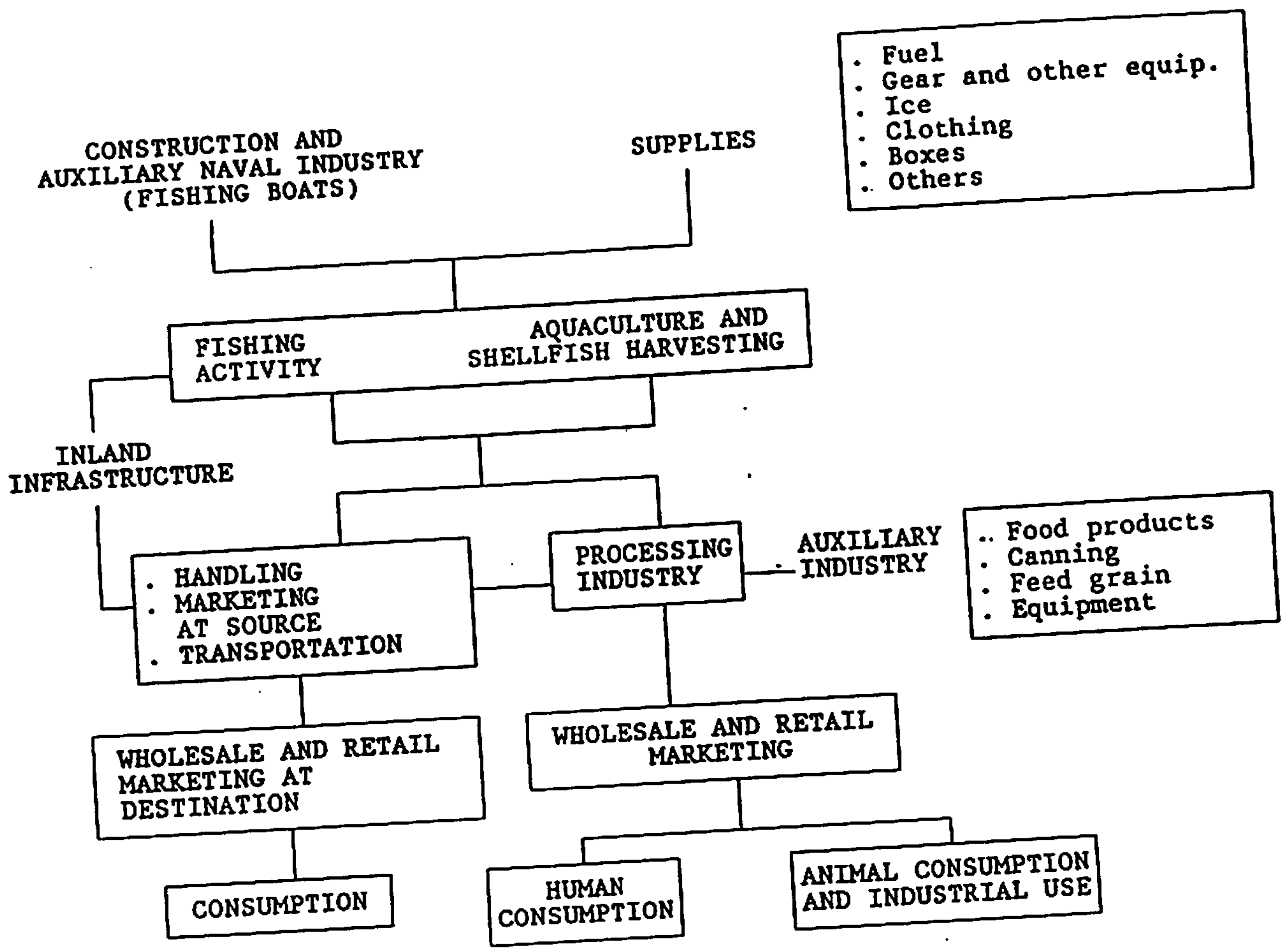
The modification of Ruling 4028/86 has defined several policies aimed at the reduction of the fleet: constitution of joint ventures, subsidies for shipbreaking, and vessel exportation.

The projected reduction of the fleet, which will be intensified in the future, together with a renewal policy, are obviously the basic components to be taken into account in order to estimate the impact on the sector of ship construction and those indirectly dependent on it.

At present, the possible reduction of exploitation of resources and the absence of agreements with countries outside the Community, as well as the loss of fishing grounds such as Namibia, have led to a number of modern vessels being taken out of service. This fact, in addition to the general trends in the fishing sector, negatively affect the construction and repair industry and the auxiliary naval industry, which latter has a strong presence in the Basque Country.

5.6.- Relationships between the different activities in this sector

The following chart shows the connections between the different activities in this sector and ancillary activities:



6.- IDENTIFICATION OF ZONES HIGHLY DEPENDENT ON FISHING AND ANCILLARY ACTIVITIES

6.1.- Delimitation of zones

In order to delimitate the zones of this report we have proceeded as follows:

First of all, we have selected every population centre or business engaged in ancillary activities.

These population centres have been chosen for their geographic proximity and administrative districts.

After delimiting these zones, other dependent areas were chosen if they met one of the following conditions:

1º) Number of fishermen higher than the provincial average.

2º) Tonnage of the fishing sector higher than the provincial average.

3º) Employment figures in absolute terms, are significant, even though not higher than the provincial average.

According to these criteria we delimitated twenty zones highly dependent on the fishing sector, taking in a total of 154 population centres.

These zones are located in eight provinces and four Autonomous Communities within Region E.1 (Figures 5 to 8). This Region accounts for about 54% of all sea fishermen in Spain.

In this respect, the Community of Galicia, to which 71% of the fishermen in this zone belongs (crews on ships registered in the ports in each zone), is in the largest in Spain, followed by the Basque Country (19%), Cantabria (6%) and Asturias (4%).

In the Community of Galicia, the province of Pontevedra accounts for 63% of all fishermen. And, within this province, the Ria of Vigo has 68% of all fishermen in the province.

In the province of La Coruña, which represents 31% of the regional total, prominent is the Ria of Arosa (27%) and the Ria of Coruña and Betanzos (26%).

In the Community of Asturias, the zone of Avilés accounts for almost half the number of fishermen in the Community.

In the Community of Cantabria we have delimitated a single zone.

Finally, in the Basque Country, foremost in the province of Biscay (66%) is the zone of Bermeo (50%) and, within the province of Guipúzcoa (34%), Donostia (68%).

As for the number of jobs connected with the fishing sector, the overall picture is slightly different.

Thus, the Community of Galicia acquires greater relative importance (74%) and within it, although Pontevedra is still the leading province (59%), the figure for La Coruña rises (37%). In the province of Pontevedra the same can be said about the Ria de Vigo (65%) and that of Arosa (22%).

In the province of La Coruña the Ria of Arosa acquires greater importance, (33%) as does the Ria of Coruña and Betanzos (33%), which overtakes the former.

In the Community of Asturias, (4%) for which overall figures are lower, the Avilés zone is the most important one (41%).

The Community of Cantabria and the Basque Country also lose importance to the benefit of Galicia.

In the Basque province of Biscay, Bermeo (43%) retains its first place but loses points -as does Ondarroa (34%)- to Bilbao, which is only important with respect to the number of fishermen.

There are no relevant changes in the zones of Guipúzcoa.

FIGURE Nº 4

CHARACTERIZATION OF THE ZONES ACCORDING TO THE TOTAL NUMBER OF JOBS DEPENDENT ON THE FISHING SECTOR.

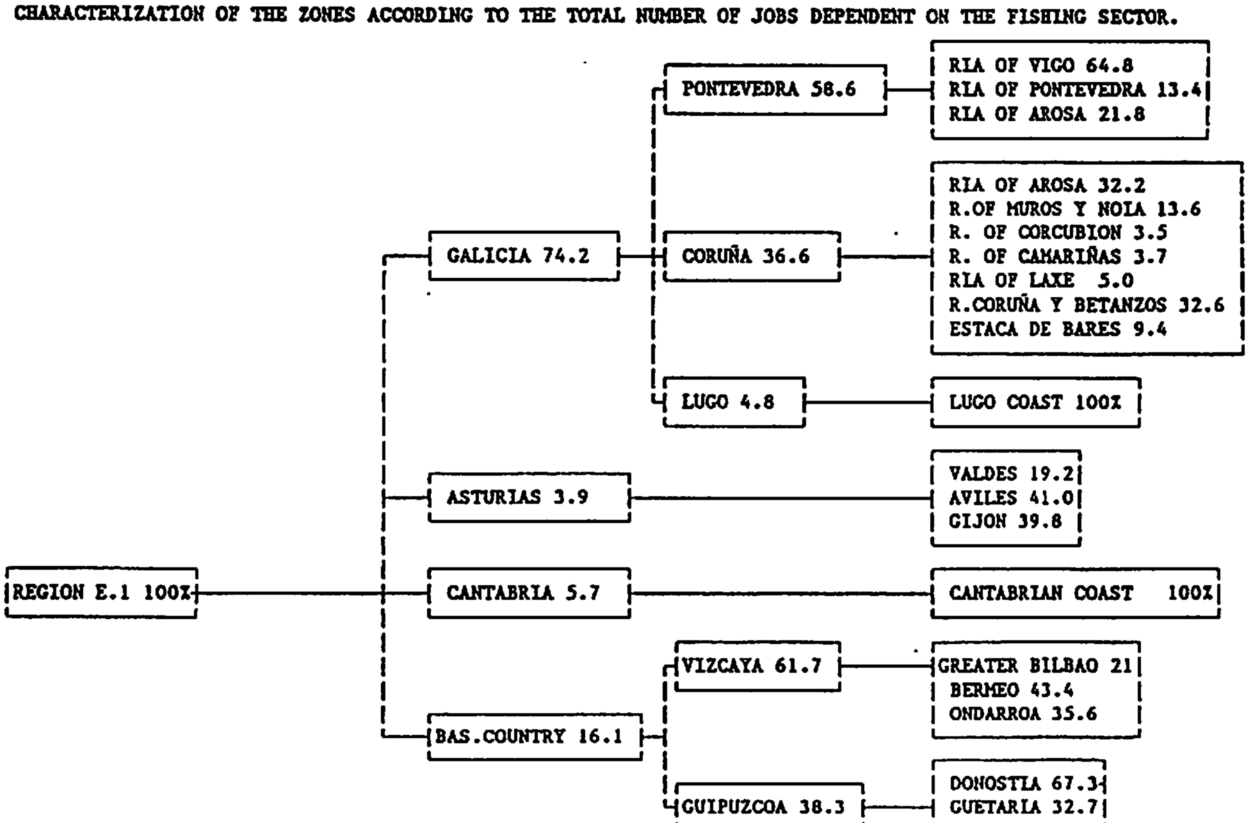


TABLE V
DEPENDENCY RATE (FISHING ACTIVITY ZONES)

ZONE (1)	GENERAL FEATURES OF THE ZONES					NUMBER OF JOBS IN FISHING AND ANCILLARY ACTIVITIES (5)					VALUE ADDED OF FISHERIES AND ANCILLARY ACTIVITIES					RELATIVE DEPENDENCE				% DEPENDENCE ON EC QUOTAS
	TOTAL POPULATION	WORK FORCE (2)	TOTAL NUMBER OF JOBS (3)	G.V.A. (4)		FISHERMEN ONLY	OTHER JOBS (F)			TOTAL	LANDINGS & FIRST HANDLING(6)	OTHER ACTIVITIES (1)			TOTAL	IN TERMS OF JOBS (%)		IN ECONOMIC TERMS (%)		
				TOTAL *	PER CAPITA **		AQUACULTURE	PROCESSING INDUSTRY	OTHER (7)			AQUACULTURE	PROCESSING SECTOR	OTHER (7)						
	A		B	C	D=C/A	E	F 1	F 2	F 3	G=E+F	H	I 1	I 2	I 3	J=H+I	E/B	G/B	H/C	J/C	
RIA OF VIGO	385,623	141,390	108,543	3,096	8,029	14,472	922	2,037	16,760	34,191	151.2	10.2	54.4	315.8	531.6	13	31 ½	5 ½	17	
RIA OF PONTEVEDRA	149,652	51,106	41,985	1,175	7,850	3,192	586	663	2,658	7,099	17.8	3.6	17.7	44.8	83.9	7 ½	17	2	7	
RIA OF AROUSA	69,057	28,096	21,301	490	7,099	3,618	2,039	1,358	4,495	11,510	18.7	35.8	36.3	54.8	145.6	17	54	4	30	
TOTAL FOR PONTEVEDRA *	604,332	220,592	171,829	4,761	7,878	21,282	3,547	4,058	23,913	52,800	187.7	49.6	108.4	415.4	761.1	12 ½	30 ½	4 ½	16	
RIA OF AROUSA	59,820	24,834	20,610	378	6,316	2,837	1,988	1,552	4,233	10,610	38.6	10.6	37.7	58.4	145.3	14	51 ½	11	38 ½	
RIA MUROS Y NOIA	33,608	13,387	10,752	219	6,516	1,681	318	105	2,387	4,491	12.1	2.6	2.5	32.5	49.7	15 ½	42	6 ½	23	
RIA OF CORCUBION	12,885	5,166	4,462	72	5,614	525	5	57	560	1,147	1.6	---	1.4	10.1	13.1	12	25 ½	2 ½	18	
RIA OF CAMARIÑAS	13,548	5,908	5,176	61	4,474	630	25	24	554	1,233	1.7	---	0.6	12.8	15.1	12	24	3 ½	25	
RIA OF LAXE	26,703	11,284	9,964	110	4,127	841	31	40	728	1,640	5.9	---	1.0	15.6	22.5	8 ½	16 ½	5 ½	20 ½	
RIA OF CORUÑA	414,125	148,839	119,667	3,798	8,447	2,732	207	930	6,881	10,751	123.9	1.8	22.6	100.1	248.4	2	9	3 ½	7	
ESTACA DE BARES	24,443	10,625	9,230	150	6,129	1,262	10	452	1,338	3,062	5.8	0.1	11.0	.23.4	40.3	14	33	4 ½	27	
TOTAL FOR CORUÑA *	585,132	220,043	179,861	4,488	7,670	10,508	2,584	3,160	16,682	32,934	189.6	15.1	76.8	252.9	534.3	6	18 ½	4 ½	12	
LUGO COAST	35,268	18,774	10,810	212	5,998	2,187	17	372	1,766	4,342	30.0	---	7.3	26.7	64.0	20	40	15 ½	30	
TOTAL FOR LUGO	35,268	18,774	10,810	212	5,998	2,187	17	372	1,766	4,342	30.0	---	7.3	26.7	64.0	20	40	15 ½	30	
TOTAL FOR GALICIA *	1,224,732	459,409	362,500	9,161	7,724	33,977	6,148	7,590	42,361	90,076	407.3	64.7	192.5	668.3	1,359.4	9 ½	25	5	14 ½	
VALDES	42,690	17,192	15,199	238	5,571	416	55	19	423	913	2.4	1.1	0.6	9.6	13.7	3	6	1	6	29%
AVILES	117,795	42,637	34,209	604	5,128	1,019	10	94	822	1,945	27.0	---	2.8	21.7	51.5	3	5 ½	5	8 ½	
GIJON	301,858	107,808	85,210	2,578	8,541	645	---	47	1,195	1,887	8.0	1.2	1.4	22.3	32.9	1	2	½	1 ½	
TOTAL FOR ASTURIAS *	462,343	167.637	134,618	3,420	7,397	2,080	65	160	2,440	4,745	37.4	2.3	4.8	53.6	98.1	1 ½	3 ½	1	3	
CANTABRIA	268,396	95.227	78,529	2,566	9,561	2,913	274	1,239	2,541	6,967	27.9	2.7	31.8	46.0	108.4	4	9	1 ½	4	
TOTAL FOR CANTABRIA *	268,396	95.227	78,529	2,566	9,561	2,913	274	1,239	2,541	6,967	27.9	2.7	31.8	46.0	108.4	2	9	1 ½	4	
GREATER BILBAO	565,304	214,385	178,358	6,491	11,483	357	---	29	2,139	2,525	0.1	---	1.0	55.5	56.6	0	1 ½	0	1	
BERMEO	23,448	8,942	7,759	226	9,617	2,977	---	339	1,913	5,229	11.5	---	11.4	51.4	74.3	38 ½	67	7	33	
ONDARROA	17,058	7,236	6,181	149	8,726	2,620	---	140	1,531	4,291	38.0	---	4.7	42.6	85.3	42 ½	69 ½	26 ½	57	
TOTAL FOR VIZCAYA *	605,860	230,563	192,298	6,866	11,332	5,954	---	508	5,583	12,045	49.6	---	17.1	149.5	216.2	3	6 ½	1	3	
DONOSTIA	206,266	87,021	74,633	2,578	12,501	2,080	---	238	2,716	5,034	35.1	0.8	7.8	82.2	125.9	3	6 ½	1 ½	5	
GETARIA	19,056	8,478	7,153	178	9,374	979	---	102	1,368	2,449	13.9	---	3.3	42.4	59.6	14	34	10 ½	33 ½	
TOTAL FOR GUIPUZCOA *	225,322	95,499	81,786	2,756	12,231	3,059	---	340	4,084	7,483	49.0	0.8	11.1	124.6	185.5	4	9	2	7	
TOTAL CANTABRIAN COASTLINE *	1,561,921	588,926	487,231	15,608	9,993	14,006	339	2,247	14,648	31,240	163.9	5.8	64.8	373.7	608.3	3	6 ½	1	4	46%
Z.DEPENDENCE E.I.*	2,786,653	1048335	849,731	25,069	8,996	47,983	6,487	9,837	57,009	121,316	571.2	70.5	257.3	1042.0	1,967.7	5 ½	14	2 ½	8	32%
TOTAL E.I.	5,797,038	2348595	1974,800	47,508	8,195	47,983	7,099	10,405	68,410	133,897	571.2	77.2	272.2	1282.4	2,203.0	2 ½	7	1 ½	5	32%

SOURCES: INE (1991), INEM (1990), MAPA (1990), BBV (1987 updated 1990), Regional Fishing Councils (1988-1990), CISE (1989) and others.
* Figures in millions of ECU.
** Figures in ECUS. (1 ECU= 130 PTS.)
(1) Every zone contains several municipalities
(2) Active Population in the working age group
(3) Including self-employed
(4) Gross Value Added
(5) Permanent and temporary employment. Only direct employment. Fishermen: personnel on board
(6) Landings of Spanish ships in the zone
(7) Management and maintenance of port infrastructure, construction & repairing of fishing boats, auxiliary naval industrial fishing, wholesale trade of ship components, wholesale fish processing industry, onshore corporate shipowner activity shellfish harvesting & other. This last category has been estimated from input-output tables which would include textiles, a whole range of services provided to companies that are associated with transport, fuel, credit institutions, etc. (See Table VI)

* Figures for survey zones only (not whole province)

FIGURE 5

ZONES DEPENDENT ON FISHING AND ANCILLARY ACTIVITIES

REGION E.1.: GALICIA

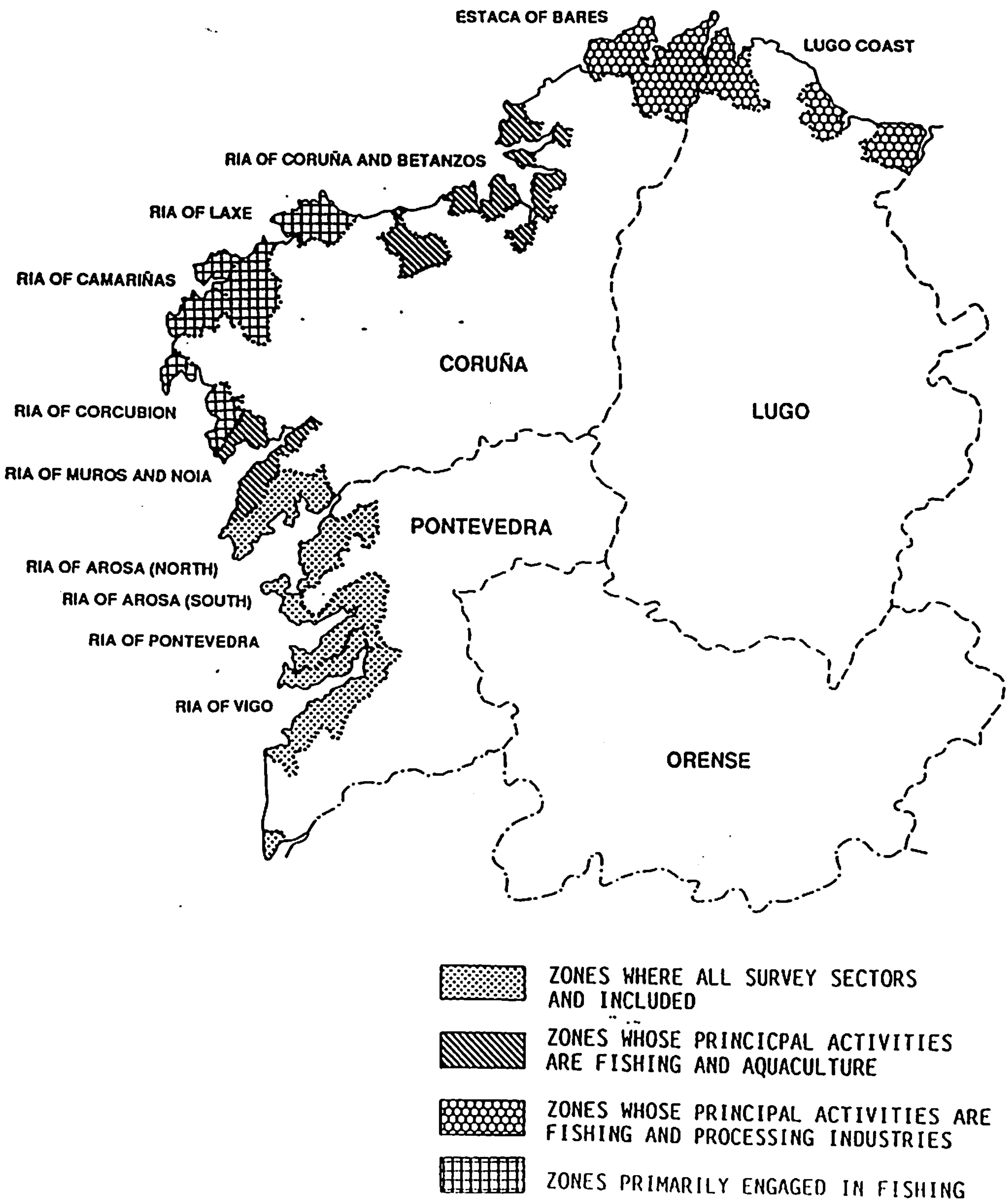


FIGURE 6

ZONES DEPENDENT ON FISHING AND ANCILLARY ACTIVITIES
REGION E.1.: ASTURIAS

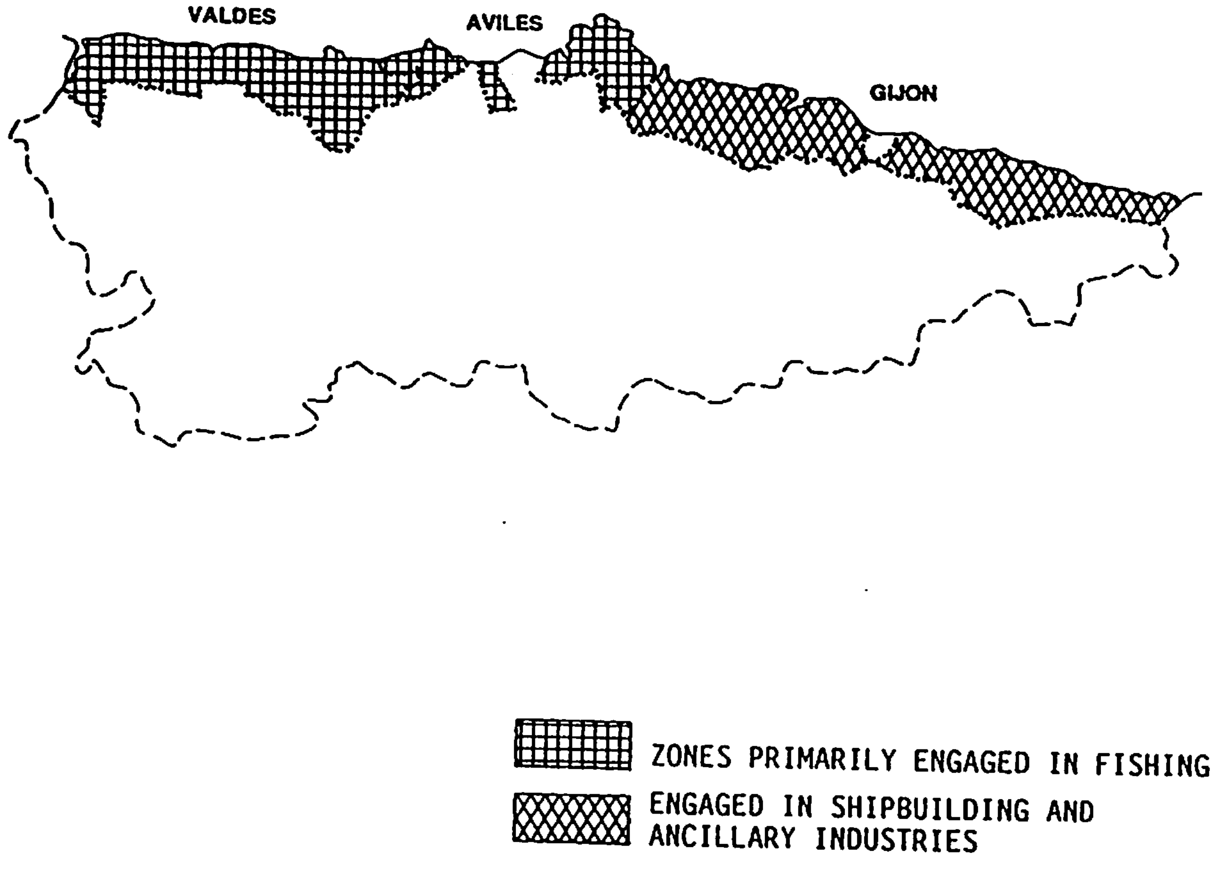


FIGURE 7

ZONES DEPENDENT ON FISHING AND ANCILLARY ACTIVITIES
REGION E.1: CANTABRIA

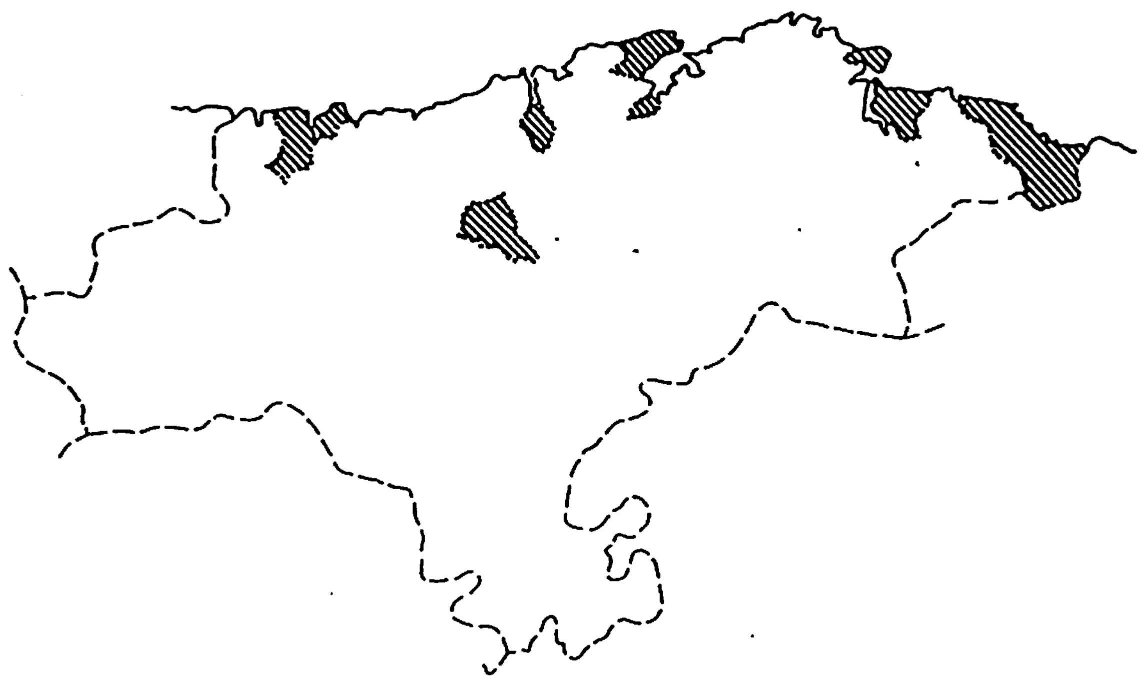
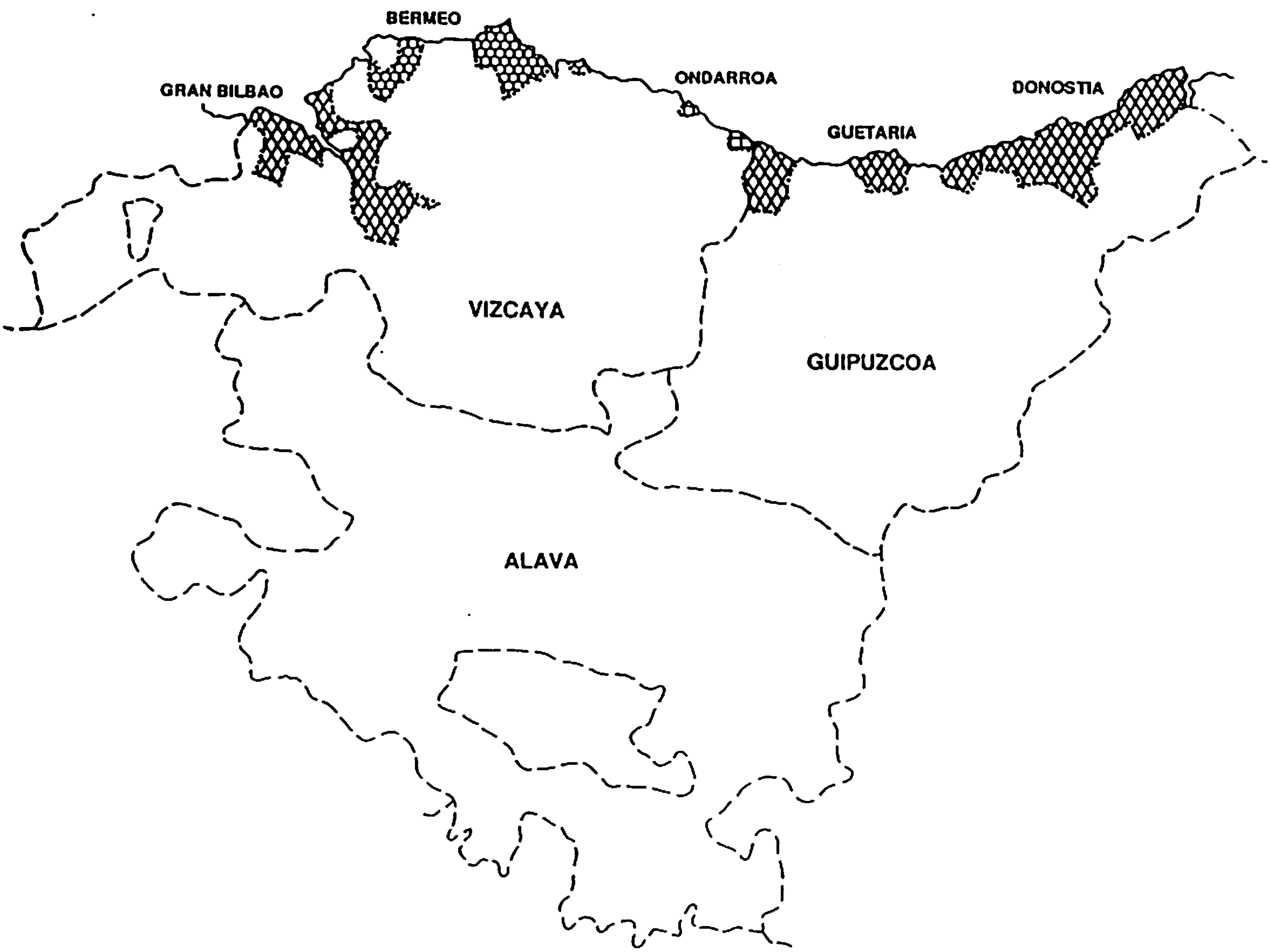


FIGURE 8

ZONES DEPENDENT ON FISHING AND ANCILLARY ACTIVITIES
REGION E.1: BASQUE COUNTRY



ZONES WHOSE PRINCIPAL ACTIVITIES ARE FISHING AND PROCESSING INDUSTRIES

ZONES PRIMARILY ENGAGED IN FISHING

ENGAGED IN SHIPBUILDING AND ANCILLARY INDUSTRIES

E.1. REGION: MUNICIPALITIES

ZONE	PROVINCE	AUT.COMMUNITY
VIGO ESTUARY	PONTEVEDRA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Baiona	. Mos
. Cangas	. Porriño
. Guarda (A)	
. Moaña	
. Nigrán	
. Redondela	
. Soutomaior	
. Vigo	
. Vilaboa	

ZONE	PROVINCE	AUT.COMMUNITY
PONTEVEDRA ESTUARY	PONTEVEDRA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Bueu	
. Marín	
. Poio	
. Pontevedra	
. Sanxenxo	

ZONE	PROVINCE	AUT.COMMUNITY
AROUSA ESTUARY	PONTEVEDRA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Caldas de Reyes	. Catoira
. Cambados	
. Grove (O)	
. Ribadunia	
. Vilagarcía de Arousa	
. Vilanova de Arousa	

ZONE	PROVINCE	AUT.COMMUNITY
AROUSA ESTUARY	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Boiro	. Dodro
. Puebla del Caramiñal	
. Rianxo	
. Ribeira	

ZONE	PROVINCE	AUT.COMMUNITY
MUROS & NOIA ESTUARY	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Muros	
. Noia	
. Porto do Son	

ZONE	PROVINCE	AUT.COMMUNITY
CORCUBION ESTUARY	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Carnota	. Cee
. Cocubion	
. Fisterra	

ZONE	PROVINCE	AUT.COMMUNITY
CAMARIÑAS ESTUARY	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Camariñas	. Cee
. Muxía	

ZONE	PROVINCE	AUT.COMMUNITY
LAXE ESTUARY	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Laxe	
. Malpica de Bergantiños	
. Vimianzo	

ZONE	PROVINCE	AUT.COMMUNITY
CORUÑA & BETANZOS	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Ares	. Arteixo
. Betanzos	. Bergoño
. Coruña (A)	. Caballas
. Ferrol (El)	. Cambre
. Laracha	. Carballo
. Miño	. Culledero
. Mugardos	. Fene
. Oleiros	. Neda
. Pontedeume	
. Sada	
. San Sadurniño	

ZONE	PROVINCE	AUT.COMMUNITY
ESTACA DE BARES	CORUÑA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Cariño	
. Cedira	
. Ortigueira	
. Mañon	

ZONE	PROVINCE	AUT.COMMUNITY
LUGO COAST	LUGO	GALICIA

HIHGLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Foz . Ribadeo . Vicedo . Viveiro	. Cervo . Xove . Mondoñedo

ZONE	PROVINCE	AUT.COMMUNITY
VALDES	LUGO	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Castropol . Coaña . Franco (El) . Navia . Tapia de Casariego . Valdés	

ZONE	PROVINCE	AUT.COMMUNITY
AVILES	ASTURIAS	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Avilés . Carreño . Cudillero . Gozón . Soto del Barco	. Corvera de Asturias . Muros del Nalón

ZONE	PROVINCE	AUT.COMMUNITY
GIJON	ASTURIAS	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Colunga . Gijón . Llanes . Ribadedeva . Ribadesella . Villaviciosa	

ZONE	PROVINCE	AUT.COMMUNITY
CANTABRIA COAST	SANTANDER	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Argoños . Astillero (El) . Castro Urdiales . Colindres . Corrales de Buelna (Los) . Laredo . Polanco . San V. de la Barquera . Santander . Santoña	. Cartes . Medio Cudello . Reocín . Torrelavega . V. de S. Vicente . Villaescusa

ZONE	PROVINCE	AUT.COMMUNITY
GREATER BILBAO	VIZCAYA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Abanto-Zierbana . Bilbao . Getxo . Portugalete . Santurtzi	. Arrigorriaga . Barakaldo . Galdakao . Larrabegua . Leoia . Muskiz . Ortuella . Valle de Trápaga . Zarátamo

ZONE	PROVINCE	AUT.COMMUNITY
BERMEO	VIZCAYA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Bermeo . Elantxove . Lemoniz . Mundaca . Plentzia	. Arrieta . Busturia . Gatika . Gauteguiz . Guernica-Lumo . Maruri . Meñaca . Morga . Muxika . Munguia . Errigoiti . Urduliz

ZONE	PROVINCE	AUT.COMMUNITY
ONDARROA	VIZCAYA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Lekeitio . Ondarroa	. Amoroto . Etxebarría . Guizaburuaga . Markina-Xemein

ZONE	PROVINCE	AUT.COMMUNITY
DONOSTIA	GUIPUZCOA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Donostia . Hondarribia . Pasaia	. Irun . Rentería

ZONE	PROVINCE	AUT.COMMUNITY
GETARIA	GUIPUZCOA	GALICIA

HIGHLY DEPENDENT MUNICIPALITIES	MUNICIPALITIES IMPLEMENTING EMPLOYMENT POLICY
. Getaria . Mutriku . Orio . Zumaia	. Eibar . Elgoibar

6.2. Characterization of employment in the dependent areas of the E.1 region

Fishing and ancillary activities directly employ 133,897 people in Region E.1, although only 121,316 actually reside in the zones considered highly dependent (TABLE VI).

Within these zones, 97,317 jobs are in fishing and aquaculture (offshore and inland) and sectors that supply goods and services, and 23,999 jobs in activities allied to the former.

This first grouping can be subdivided into two main groups: fishing and ancillary activities. The former represent 74% of the 97,317 direct jobs mentioned above.

The other 26% corresponds to onshore personnel engaged in naval industry, services, etc. Prominent is employment in ship construction (21%) and auxiliary naval industry and commercial activities.

Among those activities dependent on the fishing sector and aquaculture (20%), the processing industry is foremost, accounting for 41% of all jobs.

The employment figures shown in TABLE VI are taken from various sources; the main ones are included at the bottom of the table.

The following is important in order to understand the table:

- Shellfish harvesting scores high on the natural shoals market, having great economic and social significance in the Galician sub-region, specifically with reference to marine (mussels, oysters) or continental aquaculture.

- The figures for shipbuilding and ship repairing in the fishing industry and for the auxiliary naval fishing industry refer only to the employment of shipbuilders, manufacturers and wholesalers whose main activity is fishing-related.

- The employment figures have been divided into two groups: The first sub-total corresponds to fishing, aquaculture, shellfish catches and their supply activities. The second corresponds to those sub-sectors whose activities are based on fish products and aquaculture (wholesale distribution, transport, processing industry).

- Both sub-totals have been obtained with the help of direct coefficient tables (input-output) and the sections entitled "Others" were obtained from the difference between the sub-total and detailed activities. "Others" also refers to direct and region-resident employment and includes a range of activities: clothing, various services afforded to companies pertaining to transport, maintenance and upkeep of dock infrastructure, credit institutions and insurance companies, etc.

TABLE VI

DIRECT EMPLOYMENT PROVIDED BY FISHING AND ANCILLARY ACTIVITIES IN DEPENDENT ZONES OF REGION E.1

ZONES	CREWS	ON SHORE CORP. SHIP - OWNER ACTIV.	AQUA-CULTURE	SHELL - FISH HARV.	FISH. ING BOAT AND REPA.	AUX. IND. SALTW FISH. IND.	SALE OF GEAR & NAUT. SUP.FOR F.VESS.	(1) OTHERS	SUB-TOTAL	WHOLE SALE DIST.	TRANS-PORTATION	PROCES. INDUS-TRY	(1) OTHERS	SUB-TOTAL	TOTAL
RIA OF VIGO	14472	986	922	3803	2217	1134	303	4215	28052	1243	865	2037	1994	6139	34191
RIA OF PONTEVEDRA	3192	153	586	692	49	42	10	930	15654	151	191	663	440	1445	7099
RIA OF AROUSA	3618	37	2039	2083		84	2	1054	8917	521	216	1358	498	2593	11510
TOTAL FOR PONTEVEDRA *	21282	1176	3547	6578	2266	1260	315	6199	42623	1915	1272	4058	2932	10177	52800
RIA OF AROUSA	2837	94	1988	2215		40	17	875	8066	269	219	1552	504	2544	10610
RIA OF MUROS AND NOIA	1681	115	318	1286				519	3919	38	130	105	299	572	4491
RIA OF CORCUBION	525	8	5	198	40		1	162	939	17	41	57	93	208	1147
RIA OF CAMARIÑAS	630	14	25	112				194	975	73	49	24	112	258	1233
RIA OF LAXE	841	17	31	211				259	1359	27	65	40	149	281	1640
R. CORUÑA AND BETANZOS	2732	225	207	2735	300	320	185	843	7547	1578	211	930	485	3204	10751
ESTACA DE BARES	1262	32	10	566			2	360	2262	25	98	452	225	800	3062
TOTAL FOR LA CORUÑA *	10508	505	2584	7323	340	360	205	3242	25067	2027	813	3160	1867	7867	32934
LUGO COAST	2187	119	17	619	80		5	548	3575	81	75	372	239	767	4342
TOTAL FOR LUGO *	2187	119	17	619	80		5	548	3575	81	75	372	239	767	4342
TOTAL FOR GALICIA *	33977	1800	6148	14520	2686	1620	525	9989	71265	4023	2160	7590	5038	18811	90076
VALDES	416	34	55		152			150	807	18	19	19	50	106	913
AVILES	1019	151	10		39			370	1589	93	46	94	123	356	1945
GIJON	645	74			741	20		234	1714	20	28	47	78	173	1887
TOTAL FOR ASTURIAS *	2080	259	65		932	20		754	4110	131	93	160	251	635	4745
CANTABRIAN COAST	2913	337	274		700		8	894	5126	128	90	1239	384	1841	6967
TOTAL FOR CANTABRIA *	2913	337	274		700		8	894	5126	128	90	1239	384	1841	6967
GREATER BILBAO	357	34			240	1456	148	119	2354	96	8	29	38	171	2525
BERMEO	2977	247			120	80		989	4413	85	71	339	321	816	5229
ONDARROA	2620	105			80			870	3675	132	62	140	282	616	4291
TOTAL FOR VIZCAYA *	5954	386			440	1536	148	1978	10442	313	141	508	641	1603	12045
DONOSTIA	2080	159			160	940	44	813	4196	262	67	238	271	838	5034
GUETARIA	979	209				586	21	383	2178	10	32	102	127	271	2449
TOTAL FOR GUIPUZCOA *	3059	368			160	1526	65	1196	6374	272	99	340	398	1109	7483
T.CANTABRIAN COSTALINE*	14006	1350	339		2232	3082	221	4822	26052	844	423	2247	1674	5188	31240
TOTAL ZONES REGION E.1	47983	3150	6487	14520	4918	4702	746	14811	97317	4867	2583	9837	6712	23999	121316

SOURCES: MARINE SOCIAL INSTITUTE, REGIONAL FISHING COUNCILS, MAPA, PEDECA, CAMERDATA, CISE AND OTHERS. 1989-90

(1) The difference after applying technical coefficients to direct employment (Input-Output tables). "Others" include textiles, a whole range of services provided to companies associated with transport, fuel, credit institutions, etc (estimated for zones)

* Figures for survey zones only (not whole province)

6.3.- Socio-demographic features of these jobs

Women are a small minority in this sector (4% of all jobs). This proportion is valid for three out of the four Autonomous Communities under study (in Cantabria women constitute 12% of all jobs). (table VII)

By age structure, most of the workforce is included in the 25-54 age group (73%), while in Cantabria there is slightly more staff aged over 54 than under 25. That is, people employed in this sector in Cantabria would be relatively older than those in Galicia or the Basque Country.

Regarding educational background, most of the workforce has completed primary school (61%), followed by those with secondary education (26%). Nevertheless, there is a larger percentage of people without educational qualifications (11%), concentrated in Galicia and the Basque Country. By Autonomous Communities, Galicia has the lowest average educational level (more than three out of four workers has no secondary education) whereas Cantabria and the Basque Country are above average for employees with secondary or further education (44% and 51% respectively).

68% of the workforce are employees and 32% self-employed. The proportion of recruited labour is higher in the Basque Country (96%) than in Cantabria (62%).

Finally, the unemployment rate in Region E.1 reached 7% of the active population in the fishing sector (but 16% in Asturias, and slightly below the average figure in Galicia).

6.4.- Gross value added per job

Regional G.V.A. per job stands at around Ecu24,100. This figure falls to 16,452 when considering only the fishing sector and ancillary activities.

The highest income is located in the Basque province of Guipúzcoa (Ecu24,789) and the lowest (Ecu14,415) in the Galician province of Pontevedra.

By zones, those engaged primarily in fishing are the ones with the lowest relative income (for instance, the Rias of Corcubión and Muros in Galicia).

On the other hand, the Donostia and Guetaria zones (province of Guipúzcoa) far exceed the average, with an income of Ecu24,000. Their principal activities are shipbuilding and auxiliary industry.

Avilés (Principality of Asturias), with an income of Ecu26,478 (the highest in the region, despite being engaged primarily in fishing), is an isolated case. The zone of Gijón, also in Asturias, whose main activities are shipbuilding and auxiliary industry, nevertheless has an income below the Regional average.

TABLE VII
SOCIO-DEMOGRAPHIC PROFILE OF THE WORKFORCE IN THE FISHING SECTOR IN REGION E.1.
(Vertical percentages)

E.1.	GALICIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	TOTAL
SEX					
· MALE	97%	95%	88%	97%	96%
· FEMALE	3%	5%	12%	3%	4%
OCCUPATION					
· SELF-EMPLOYED	35%	*	38%	4%	32%
· EMPLOYED	65%	*	62%	96%	4%
AGE					
-- - UNDER 25	16%	*	13%	16%	16%
· 25 - 54	73%	*	75%	70%	73%
· OVER 54	11%	*	12%	14%	11%
QUALIFICATIONS					
· NO STUDIES	11%	*	--	7%	11%
· PRIMARY	65%	*	56%	42%	61%
· SECONDARY	23%	*	38%	47%	26%
· FURTHER	1%	*	6%	4%	2%
UNEMPLOYMENT RATE	6%	16%	*%	7%	7%

SOURCE: INE 1.990

TABLE VIII

GROSS VALUE ADDED PER JOB FOR FISHING AND ANCILLARY ACTIVITIES

(FIGURES ARE GIVEN IN ECU)

ZONES	G.V.A. PER JOB
RIA OF VIGO	15,547
RIA OF PONTEVEDRA	11,819
RIA OF AROSA	12,649
PONTEVEDRA *	14,415
RIA OF AROSA	13,694
RIA OF MUROS	11,067
RIA OF CORCUBION	11,421
RIA OF CAMARIÑAS	12,247
RIA OF LAXE	13,720
RIA OF CORUÑA	23,105
ESTACA DE BARES	13,161
CORUÑA *	16,226
LUGO COAST	14,740
LUGO *	14,740
GALICIA *	15,092
VALDES	15,005
AVILES	26,478
GIJON	14,415
ASTURIAS *	20,674
CANTABRIA	15,559
CANTABRIA *	15,559
GREATER BILBAO	22,416
BERMEO	14,209
ONDARROA	19,879
VIZCAYA *	17,949
DONOSTIA	24,000
GUETARIA	24,336
GUIPUZCOA *	24,789
TOTAL CANTABRIAN COASTLINE *	19,472
DEPEND. ZONES E.1. *	16,219
TOTAL REGION E.1.	16,452

SOURCE: Compiled by CISE

* Figures for survey zones only (not whole province)

TABLE IX
VALUE ADDED IN FISHING AND ANCIL. ACTIVITIES IN THE DEPENDENT ZONES OF REGION E.1.

ZONES	FISHING	SALTW. ACTV.OF SHIPOWNER COMP.	AQUACULTURE	FISHING BOAT BUILD-ING	AUX. SECT. SALTW FISH. IND.	SALE OF GEAR & NAUT. SUP.FOR F.VESS.	OTHERS	SUB-TOTAL	WHOLESALE TRADE	TRANSPORTATION	ON-SHORE INDUSTRY	(1) OTHERS	SUB-TOTAL	TOTAL
RIA OF VIGO	151.2	15.3	10.2	78.6	23.6	6.8	92.8	378.6	28.0	27.8	54.4	42.9	153.0	531.6
RIA OF PONTEVEDRA	17.8	2.4	3.6	1.7	0.9	0.2	20.5	47.2	3.4	6.1	17.7	9.5	36.7	83.9
RIA OF AROUSA	18.7	0.6	35.8		1.7	0.0	23.2	80.1	11.7	6.8	36.3	10.7	65.5	145,6
TOTAL FOR PONTEVEDRA *	187.7	18.3	49.6	80.3	26.2	7.0	136.5	505.9	43.1	40.7	108.4	63,1	255,2	761,1
RIA OF AROUSA	38.6	1.9	10.6		0.8	0.4	27.0	79.2	5.9	7.1	37.7	15.4	66.1	145,3
RIA OF MUROS Y NOIA	12.1	2.3	2.6				16.0	33.0	0.8	4.2	2.5	9.2	16.7	49,7
RIA OF CORCUBION	1.6	0.2		0.4		0.0	5.0	7.2	0.4	1.3	1.4	2.8	5.9	13.1
RIA OF CAMARIÑAS	1.7	0.3					6.0	7.9	1.6	1.6	0.6	3.4	7.2	15.1
RIA OF LAXE	5.9	0.3					8.0	14.2	0.6	2.1	1.0	4.6	8.3	22.5
R. CORUÑA AND BETANZOS	123.9	4.4	1.8	3.0	6.3	4.1	26.0	169.5	34.7	6.9	22.6	14.9	57.3	248.4
ESTACA DE BARES	5.8	0.6	0.1			0.0	12.0	18.6	0.6	3.2	11.0	6.9	21.7	40.3
TOTAL FOR LA CORUÑA *	189.6	10.0	15.1	3.4	7.1	4.5	100.0	329.6	44.6	26.4	76.8	57.2	204.8	534.4
LUGO COAST	30.0	2.4		2.4		0.1	12.6	47.4	1.7	2.2	7.3	5.4	16.6	64.0
TOTAL FOR LUGO	30.0	2.4		2.4		0.1	12.6	47.4	1.7	2.2	7.3	5.4	16.6	64.0
TOTAL FOR GALICIA *	407.3	30.7	64.7	86.1	33.3	11.6	249.1	882.9	89.4	69.3	192.5	125.7	476.6	1359.4
VALDES	2.4	0.5	1.1	2.0			4.6	10.6	0.4	0.6	0.6	1.5	3.1	13.7
AVILES	27.0	2.2		0.5			11.4	41.1	2.3	1.5	2.8	3.8	10.4	51.5
GIJON	8.0	1.1	1.2	9.6	0.5		7.3	27.6	0.5	1.0	1.4	2.4	5.3	32.9
TOTAL FOR ASTURIAS *	37.4	3.8	2.3	12.1	0.5		23.3	79.3	3.2	3.1	4.8	7.7	18.8	98.1
CANTABRIAN COAST	27.9	4.8	2.7	6.0		0.2	21.9	63.5	0.8	3.0	31.8	9.3	44.9	108.4
TOTAL FOR CANTABRIA *	27.9	4.8	2.7	6.0		0.2	21.9	63.5	0.8	3.0	31.8	9.3	44.9	108.4
GREATER BILBAO	0.1	0.5		2.3	42.0	3.5	3.6	52.0	2.4	0.2	1.0	1.1	4.6	56.6
BERMEO	11.5	3,7		1.1	2.3		30.6	48.6	2.1	2.5	11.4	9.7	25.7	74.3
ONDARROA	38.0	1.5		0.8			26.4	66.7	3.2	2.2	4.7	8.5	18.6	85.3
VIZCAYA TOTAL *	49.6	5.7		4.2	44.3	3.5	60.0	167.3	7.7	4.9	17.1	19.3	48.9	216.2
DONOSTIA	35.1	3.5	0.8	3.4	33.1	1.0	23.9	100.0	7.0	2.3	7.8	8.0	25.1	125.9
GUETARIA	13.9	4.7			20.6	0.7	11.3	51.2	0.3	1.1	3.3	3.7	8.4	59.6
GUIPUZCOA TOTAL *	49.0	8.2	0.8	3.4	53.7	1.7	35.2	152.0	7.3	3.4	11.1	11.7	33.5	185.5
T.CANTABRIAN COASSTLINE *	163.9	22.5	5.8	25.7	98.5	5.4	140.4	462.1	19.0	14.4	64.8	48.0	146.2	608.3
TOTAL ZONES REGION E.1	571.2	53.2	70.5	111.8	131.8	17.1	389.5	1345.0	108.4	83.7	257.3	173.7	622.8	1967.7

SOURCES: Employment Data, (TABLE VI) Bank of Bilbao-Vizcaya, Tables Input-Output

NOTES: Figure in millions of ECU (1 ECU = 130 pts.)
Fishing value added obtained from landings of Spanish vessels in the zone

* Figures for survey zones only (not whole province)

TABLE X
LANDED CATCHES & AQUACULTURE VALUE 1990 (MILLIONS OF ECU)

ZONES	DEEP-SEA	MIDWATER & COASTAL	AQUACULTURE	TOTAL
RIA OF VIGO	159.5	120.8	16.9	297.2
RIA OF PONTEVEDRA	13.4	18.2	6.0	37.6
RIA OF AROUSA	13.2	19.7	59.6	92.5
PROVINCE OF PONTEVEDRA	186.1	158.7	82.5	427.3
RIA OF AROUSA	36.8	33.8	17.6	88.2
RIA OF MUROS AND NOIA		19.1	4.4	23.5
RIA OF CORCUBION		2.6	1.0	3.6
RIA OF CAMARIÑAS		2.5		2.5
RIA OF LAXE		9.3	1.2	10.5
RIAS OF CORUÑA AND BETANZOS	62.2	150.1	4.2	216.5
ESTACA DE BARES		9.2	1.0	10.2
PROVINCE OF LA CORUÑA	99.0	226.6	29.4	355.0
LUGO COAST		47.5	1.0	48.5
PROVINCE OF LUGO		47.5	1.0	48.5
TOTAL GALICIA	285.1	432.8	112.9	830.8
VALDES		3.9	1.8	5.7
AVILES		42.8		42.8
GIJON		12.6	2.0	14.6
ASTURIAS		59.3	3.8	63.1
CANTABRIAN COAST		44.2	4.5	48.7
CANTABRIA		44.2	4.5	48.7
GREATER BILBAO		1.0	0.1	1.1
BERMEO		18.2		18.2
ONDARROA		60.2		60.2
PROVINCE OF VIZCAYA		79.4	0.1	79.5
DONOSTIA		55.7	1.4	57.1
GUETARIA		22.1		22.1
PROVINCE OF GUIPUZCOA		77.8	1.4	79.2
TOTAL CANTABRIAN COASTLINE		260.7	9.8	270.5
TOTAL REGION E.I	285.1	693.5	122.7	1101.3

SOURCE: MAPA, FISHING COUNCILS

NOTE: IN ECUS (1 ECU - 130 PTS.)

6.5.- Summary and conclusions

To conclude, zones can be grouped by the most characteristics features of the populations under survey.

Group 1. Zones where all fishing activities are represented.
It comprises: Rias of Vigo, Pontevedra, and Arosa (Province of Pontevedra), and Ria of Arosa (Province of La Coruña), all of them in the Autonomous Community of Galicia.
Its most relevant features are: increasing and young population, with low educational level. Area very dependent on the fishing sector, with increasing unemployment, and a fishing sector gross value added per capita below the average for the Region E.1.

Group 2. Zones where fishing and aquaculture activities predominate.
It comprises: Rias of Muros-Noia, Coruña and Betanzos (both in the Province of La Coruña, Galicia), and the coast of the Autonomous Community of Cantabria.
Its most relevant features are: almost stable (slightly increasing) population, dependent, with medium educational level. Area highly dependent on the fishing sector, with decreasing unemployment, and a variable fishing sector gross value added per capita (very low in Muros-Noya, medium on the Cantabrian coast, and high in Coruña-Betanzos).

Group 3. Zones where fishing is the prevailing activity.
It comprises: Rias of Corcubión, Camariñas and Laxe (all in the Province of La Coruña, Galicia), Valdés and Avilés (Principality of Asturias), and Ondarroa (Province of Biscay, Basque Country).
Its most relevant features are: stable population, with medium-low educational level. Area very dependent on the fishing sector, with increasing unemployment (except in Avilés), and a below-average fishing sector gross value added per capita (except in Avilés).

Group 4. Zones where fishing and the processing industry are the leading activities.
It comprises: Estaca de Bares (Province of La Coruña), and the coast of Lugo (Province of Lugo), both in the Autonomous Community of Galicia; and Bermeo (Province of Biscay, Basque Country).
Its most relevant features are: almost stable (slightly increasing), mature population, with low educational level. Area very dependent on the fishing sector (except the coast of Lugo), with decreasing unemployment (except Bermeo), and a below-average fishing sector gross value added per capita.

Group 5. Zones where the main activities are shipbuilding and auxiliary naval industry.
It comprises: Gijón, (Principality of Asturias), Greater Bilbao (Province of Biscay), Guetaria and Donostia (Province of Guipúzcoa), the latter three in the Basque Country.
Its most relevant features are: increasing population, young in Greater Bilbao and Donostia, adult in Guetaria, and mature in Gijón, with higher than average educational level. Area scarcely dependent

on the fishing sector (except Guetaria), with decreasing unemployment (except Guetaria), and a fishing sector gross value added per capita well above the average of the Region E.1. (except Gijón).

A noteworthy activity in the Community of Galicia which has not been included in the foregoing is shellfishing. It accounts for 12% of all jobs in the zone and is sited mainly in Ria of Vigo (26%), the Ria of Coruña and Betanzos (19%), the Ria of Arosa (15%, Province of La Coruña), the Ria of Arosa (14%, Province of Pontevedra), and the Ria of Muros and Noia (9%).

TABLE XI

SOCIOECONOMIC FEATURES OF FISHING ZONES (EXTENDED ZONES) IN THE NORTH OF SPAIN

GEOGRAPHICAL AREA	No MUNI-CIPA.	EVOL.OVERALL POP. (1)		C.A.R 60/91	TYPE OF ZONE		EVOLUTION IN WORKFORCE			EVOLUTION REGISTERED UNEMPLOYMENT (6)			
		1.960	1.991	(2)	A(3)	B(4	1.986 (A)	1.991 (B)	(B)-(A)	1.986 (A)	1.991 (B)	(B)-(A)	(B)-(A) %
RIA OF VIGO ZONE	11	242859	413175	2.54	P	J	111574	116035	4461	35741	34528	-1213	-3.39
RIA OF PONTEVED.ZONE	7	110259	149652	1.19	P	J	40370	41985	1615	7190	9121	1931	26.86
RIA OF AROUSA ZONE	5	53669	72599	1.18	P	J	21305	22157	852	5821	7186	1365	23.45
PONTEVEDRA T.E.Z.	23	406787	635426	2.06	P	J	173249	180177	6928	48752	50835	2083	4.27
PROV. OF PONTEVEDRA	61	680229	879872	0.98	P	J	297600	309500	11900	62267	68572	6305	10.13
RIA OF AUROUSA ZONE	5	54541	63179	0.52	E	D	20653	21732	1079	3741	4387	646	17.27
Z.RIA OF MUROS Y NOIA	3	32868	33608	0.08	E	D	10218	10752	534	1067	2635	1568	146.95
RIA OF CORCUBION ZONE	4	19499	19765	0.05	E	D	6514	6854	340	708	1237	529	74.72
RIA OF CAMARIÑAS ZONE	2	13418	13548	0.03	E	D	4919	5176	257	362	732	370	102.21
RIA OF LAXE ZONE	4	29887	26703	-0.36	R	D	9469	9964	495	917	1320	403	43.95
RIAS CORUÑA/BETANZ.Z.	19	402228	512743	0.92	E	D	140566	147910	7344	47045	36325	-10720	-22.79
ESTACA DE BARES ZONE	4	33350	24443	-0.89	R	E	8772	9230	458	578	1395	817	141.30
CORUÑA T. EXT. Z.	41	585791	693889	0.78	E	D	201111	211618	10507	54418	48031	-6387	-11.74
PROV. OF LA CORUÑA	94	991729	1089810	0.33	E	D	365600	384700	19100	73535	67494	-6041	-8.22
LUGO COAST ZONE	7	51744	56987	0.34	E	D	18838	17758	-1080	2643	2948	305	11.54
PROVINCE OF LUGO	66	479530	379077	-0.70	R	E	160400	151200	-9200	19878	21003	1125	5.66
VALDES ZONE	6	54833	42690	-0.74	R	E	14337	15199	862	1833	1993	160	8.73
AVILES ZONE	7	101158	137422	1.19	P	A	37491	39746	2255	10704	9824	-880	-8.22
GIJON ZONE	6	180126	301858	2.25	P	E	80377	85210	4833	23904	22598	-1306	-5.46
ASTURIAS T. EXT. Z.	19	336117	481970	1.81	P	E	132205	140155	7950	36441	34415	-2026	-5.56
ASTURIAS	78	989344	1096155	0.36	E	E	334200	354300	20100	75015	69547	-5468	-7.29
CANTABRIAN COAST ZONE	16	223901	347124	1.83	P	J	93069	100922	7853	22261	20728	-1533	-6.89
CANTABRIA	102	432132	526866	0.73	E	D	150500	163200	12700	31298	28987	-2311	-7.38
GREATER BILBAO ZONE	14	518835	765968	1.59	P	J	217561	241470	23909	63082	49289	-13793	-21.87
BERMEO ZONE	17	47336	61049	0.97	P	J	18580	20622	2042	3990	3460	-530	-13.28
ONDARROA ZONE	6	20410	23202	0.46	E	J	7337	8143	806	1281	1407	126	9.83
VIZCAYA T. EXT. Z.	37	586581	850219	1.51	P	J	243478	270235	26757	68353	54156	-14197	-20.77
PROVINCE OF VIZCAYA	109	754383	1153515	1.76	P	J	338500	375700	37200	91053	74053	-17000	-18.67
DONOSTIA ZONE	5	207222	300777	1.50	P	J	90320	107096	16776	26428	19691	-6737	-25.49
GUETARIA ZONE	6	56540	62243	0.34	E	A	20819	24686	3867	4638	4252	-386	-8.32
GUIPUZCOA T. EXT. Z.	11	263762	363020	1.30	P	J	111139	131782	20643	31066	23943	-7123	-22.93
PROVINCE GUIPUZCOA	87	478337	671743	1.35	P	J	199200	236200	37000	54589	44139	-10450	-19.14
TOTAL EXTENDED ZONES REGION E.1.	154	2454683	3428735	1.32	P	J	973089	1052647	79558	263934	235056	-28878	-10.94
REGION E.1. TOTAL	597	4805684	5797038	0.92	E	J	1846000	1974800	128800	407635	373795	-33840	-8.30

(1) National Statistical Board
(2) Compounden Annual Rate (C.A.R.)
(3) Population Growth: E - stable, P - progressive, R - regressive
(4) Population age: E - aged, A - adult, D - dependant, J - young
(5) Active population survey. INE
(6) Registered unemployment statistics by municipalities. INEM

7.- IDENTIFICATION OF THE MEASURES THAT WILL PROVIDE FOR THE RESTRUCTURING OF THE AFFECTED ZONES

7.1.- Introduction

Restructuring plans applied in Spain in the second half of the eighties (RENAVAL, RESIDER) combined various activities in fields such as the development of infrastructures, creation and promotion of new enterprises, and also employment and professional training policies.

It is precisely because this report is concerned with these latter policies that we have focused special attention on them.

The groups affected by these restructuring plans were initially part of the industrial workforce.

This is not the case for most of the group that could be affected in this instance.

The analysis of the segments has obviously had to take into account the level of training for the different collectives concerned, in addition to the characteristics of every zone, in order to outline the list of indicators.

Before starting our analysis, we wish to stress that conditions at the time of the application of these plans (RENAVAL, RESIDER) were industrially less problematic than at present, consequently their chances of success were greater.

7.2.- Identification of the measures allowing for the restructuring of the affected zones

7.2.1. Typology of collectives and zones

According to the existing statistical indicators (population, employment, unemployment, G.V.A., employment distribution, etc.) we proceeded to a zonal classification that allowed us to establish a very specific typology: dynamic, stable, or regressive zones, on the one hand; and zones with or without the inclusion of some of the groups affected, direct or indirectly, by reduction in catches in the fishing sector.

Having established this classification, we proceeded to apply a list of criteria to determine what measures, and with what content, should be adopted in each of the twenty zones.

From the spatial viewpoint the most significant difference between these zones is the presence or absence of economic dynamism. The report understands this concept as the greater or lesser potentiality for the expansion of activities in the agricultural, fishing, industrial or services sectors. The development of programmes of professional training should be organized differently according to these trends.

Among the collectives taken into account we distinguish five different groups: 1) crew members; 2) onshore support personnel (vessel maintenance or repair, auxiliary operations, commercial activities, etc.); 3) personnel belonging to sectors supplying outputs to fishing activities (demanded by these); 4) personnel belonging to sectors demanding fishing products (wholesalers, canning industries, transportation, etc.); 5) personnel belonging to sectors producing equipment or other goods attendant to investments made in the fishing sector.

In relation to the first cluster of measures considered (support for job creation in the private sector), it was considered that two types of supports incentives should be offered to companies that contract people affected by unemployment: lump-sum subsidies and reduced Social Security contributions applied to permanent or temporary new jobs respectively.

Provided the objective was to maximize the redeployment into the labour market of all the affected personnel (as much from the fishing sector as from others) it was thought that these measure should be applied to all sectors under consideration.

In relation to the second cluster of measures (temporary jobs in the public sector), only those activities related to public works or services were considered. Given the difficulties for job creation in the private sector, it was reckoned that the temporary incorporation of people affected by unemployment into some public activities could be a help to their later reintegration in the labour market of this zone.

To this aim, a preliminary inventory of activities carried out by public entities or organizations was used (whose figures are listed in the text of this report). Every group considered was "assigned" the activities that best matched their professional qualifications; this assignment will obviously be adjusted as soon as the various measures are implemented in the different zones.

The third cluster of measures -professional retraining- is the one of most complex implementation because the selection and assignment of courses will demand the organization of a specific programme in every zone or for neighbouring zones.

As a general criterion it was considered necessary for crew members to undergo a pre-professional training course.

For the majority of this group, whose familiarity with technical tasks is meagre, it is be advisable to provide them with training that enables flexibility in their capability. The same criterion was applied to some of those working onshore (manual operations), and also for some groups of other sectors indirectly related to fishing.

Courses in "basic professional training" are assigned to every group. Nonetheless, as happens in "specialized training" courses, their content will be determined according to the function of the characteristics and potentialities of the zones.

Thus, in an "industrial" zone, it seems sensible to develop specialities oriented to occupations of an industrial or similar character in the affected zone or neighbouring areas. In a zone with more touristic potentialities, courses oriented to training for occupations more appropriate to these services should be preferred.

About "early retirements" it has been considered convenient to support those groups with an older age structure (who also display more resistance to retraining). For this reason the group of crew members is potentially the most appropriate for the application of this measure (early retirement from the age of 55). All other groups more directly affected by a reduction in catches (onshore personnel and personnel dependent on fishing products) are included as potential beneficiaries though only from the age of 60.

Failure to consider some type of courses in certain zones (for instance: mechanics in less industrialized areas) does not mean an absolute absence of a course of that kind in that zone. Eventually some courses will be included according to specific needs and programmes.

In relation to "unemployment benefits" it has been considered that all groups should be protected in a form complementary to the ordinary subsidies contemplated by Spanish legislation. For this reason a complementary allowance has been suggested for those aged 55 -or 50 if they support a family-. In the case of the crew members, this measure is obviously connected with the early retirement age referred to above.

Finally, on "incentives for self-employment" it has been similarly considered necessary to facilitate the development of independent labour. With this aim various measures of support have been contemplated, which are more substantial in the case of crew members and of onshore personnel. In both cases, in addition to immediate payment of the whole amount of the unemployment benefit to which the worker has legal right according to the time she/he has been contributing to Social Security, she/he will receive a lump sum according to the characteristics and amount of the investment to be made in order to establish him/herself independently.

In all cases, the opportunity should also exist for selecting projects, according not only to their economic viability but also according to the characteristics and training of the beneficiary. Accordingly, this measure should be combined eith Facilities for appropriate basic training or professional retraining.

7.2.2.- List of occupations under consideration

The list of occupations to which the above training courses for each group should be addressed have been established according to the possibilities that the economy of the zones and regions of this inquiry offer now and in the future. That is, the assessment of occupations on the increase or showing a higher demand structure, compared with scarcity of personnel in the labour market.

Also taken into account are the real possibilities of retraining the different collectives according to the sector and trade from which they come.

According to these criteria, we have proceeded to draw up a list of target occupations for which both levels of professional training considered -basic and specialized- should be developed.

These contents are included in the CATALOG developed by the INEM (National Bureau of Employment) in Spain, not only directly by it, but also through Employment Centres spread throughout the different districts and Autonomous Communities of the country.

This means that, once the group has been established for inclusion in a certain course and level, the services of the INEM will participate in its subsequent education or retraining. To that end coordinated actions would be organized by those services, which, for the sake of efficiency, might at times necessitate the redeployment of some people from these groups to specific geographical points where they would be taught and trained accordingly.

7.3.- Description of the potentialities for job creation, professional training and redeployment to other sectors

The following tables summarise the measures to boost employment in the most affected groups.

JOBS LOSSES AMONG CREW MEMBERS

- M.1. INCENTIVES TO JOB CREATION
  - M.1.1.- Lump-sum subsidies to companies for permanent contracts
  - M.1.2.- Reduction of Social Security contributions (80% reduction)
- M.2. JOB CREATION IN THE PUBLIC SECTOR
  - A.1.- Fishing and allied
  - A.2.- Forestry
  - A.3.- Farming & Stockbreeding
  - A.10.- Craftwork
  - A.13.- Community services
  - A.14.- Tourism and leisure
- M.3. PROFESSIONAL RETRAINING
  - C.1. Pre-professional
  - C.2. Professional
  - C.3. Specialised
  - 01.- Saltwater aquaculture, fish farms, assisstants in oceanographic institutes
  - 02.- Field sanitation, reforestation, industrial breeding grounds
  - 03.- Intensive cultivation, farming farm cooperatives
  - 04.- Canners, food handling, food processing and treatment
  - 09.- General building work, plank moulding, ironwork, Kilning, dry dealing
  - 011.- Sailors in cargo vessels, sailors in passenger vessels, helmsmen
  - 013.- Street cleaning, Maintenance of roads and ways, beach cleaning, maintenance of installation, maintenance of parks and gardens
  - 014.- Water sports, pleasure sailing, lifeguards
  - 015.- Gardening, building cleaning, surveillance and security, catering, hotel service
- M.4. EARLY RETIREMENTS
  - M.4.2. People aged between over 55
- M.5. UNEMPLOYMENT BENEFITS
  - M.5.2. People aged 50 and 55 years old
- M.6. SELF-EMPLOYMENT INCENTIVES
  - M.6.1. Lump-sum benefit payments
  - M.6.2. Incentives for self-employed workers

DIRECT ONSHORE FISHING SECTOR EMPLOYMENT

- M.1. INCENTIVES TO JOB CREATION
  - M.1.1.- Lump-sum subsidies to companies for permanent contracts
  - M.1.2.- Reduction of Social Security contributions (80% reduction)
- M.2. JOB CREATION IN THE PUBLIC SECTOR
  - A.1.- Fishing and allied
  - A.10.- Craftwork
  - A.13.- Community services
  - A.14.- Tourism and leisure
- M.3. PROFESSIONAL RETRAINING
  C.1. Pre-professional
  C.2. Professional
  C.3. Specialised
  - 01.- Saltwater aquaculture, fish farms, assistants for oceanographic institutes
  - 02.- Field sanitation, reforestation, industrial breeding grounds
  - 03.- Intensive cultivation, farming, farm cooperatives
  - 04.- Canners, food handling, food processing and treatment
  - 06.- Taylaring, Boxing and storing
  - 012.- Commodities handling, consignee of exportation
  - 016.- Home electric appliances, plumbing, installations, electricity
- M.4. EARLY RETIREMENTS
  - M.4.1. People over 60
- M.5. UNEMPLOYMENT BENEFITS
  - M.5.1. People over 55
- M.6. SELF-EMPLOYMENT INCENTIVES
  - M.6.1. Lump-sum benefit payments
  - M.6.2. Incentives for self-employed workers

INDIRECT ONSHORE FISHING SECTOR EMPLOYMENT

- M.1. INCENTIVES TO JOB CREATION
  - M.1.1.- Lump-sum subsidies to companies for permanent contrasts
  - M.1.2.- Reduction of Social Security contributions (80% reduction)
- M.2. JOB CREATION IN THE PUBLIC SECTOR
  - A. 1.- Fishing and allied
  - A.10.- Craftwork
  - A.13.- Community services
  - A.14.- Tourism and leisure
- M.3. PROFESSIONAL RETRAINING
  C.2. Professional
  C.3. Specialised
  - 04.- Canners, food handling, food processing and treatment
  - 010.- Wood carving, preservation
  - 012.- Commodities handling, consignee of exportation
  - 015.- Gardening, building cleaning, surveillance and security, catering, hotel service
  - 016.- Home electric appliances, plumbing, installations, electricity
- M.5. EMPLOYMENT BENEFITS
  - M.5.1. For people over 55
- M.6. SELF-EMPLOYMENT INCENTIVES
  - M.6.1. Lump-sum benefit payments

EMPLOYMENT OF DEPENDANTS ON FISHING SECTOR

- **M.1. INCENTIVES TO JOB CREATION**
  - M.1.1.- Lump-sum subsidies for companies for permanent contrasts
  - M.1.2.- Reduction of Social Security contributions (80% reduction)
- **M.2. JOB CREATION IN THE PUBLIC SECTOR**
  - A.10.- Craftwork
  - A.13.- Community services
  - A.14.- Tourism and leisure
- **M.3. PROFESSIONAL RETRAINING**
  C.2. Professional
  C.3. Specialised
  - 04.- Canners, food handling, food processing and treatment
  - 011.- Sailors in cargo vessels, sailors in passenger vessels, helmsmen
  - 012.- Commodities handling, consignee of exportation
  - 015.- Gardening, building cleaning, surveillance and security, catering, hotel service
- **M.4. EARLY RETIREMENTS**
  - M.4.1.- For people over 60
- **M.5. UNEMPLOYMENT BENEFITS**
  - M.5.1. For people over 55
- **M.6. SELF-EMPLOYMENT INCENTIVES**
  - M.6.1. Lump-sum benefit payments

JOBS LOSSES IN THE INVESTMENT SECTOR

- **M.1. INCENTIVES TO JOB CREATION**
  - M.1.1.- Lump-sum subsidies to companies for permanent contrasts
  - M.1.2.- Reduction of Social Security contributions (80% reduction)
- **M.2. JOB CREATION IN THE PUBLIC SECTOR**
  - A.10.- Craftwork
  - A.13.- Community services
  - A.14.- Tourism and leisure
- **M.3. PROFESSIONAL RETRAINING**
  C.1. Pre-professional
  C.2. Professional
  C.3. Specialised
  - 05.- Mechanics, maintenance, boiler craft
  - 07.- Processing materials
  - 08.- Boiler craft, assembly, shipwrighting
  - 09.- Building, plank moulding, ironwork, kilning, dry dealing
  - 012.- Commodities handling, consignee agent of exportation
  - 014.- Water sports, pleasure sailing, lifeguards
  - 015.- Gardening, building cleaning, surveillance and security, catering, hotel service
  - 016.- Home appliances, plumbing installations, electricity
- **M.5. UNEMPLOYMENT BENEFITS**
  - M.5.1. For people over 55
- **M.6. SELF-EMPLOYMENT INCENTIVES**
  - M.6.1. Lump-sum benefit payments

FIGURE 9

ZONES OF APPLICATION

REGION E.1: GALICIA

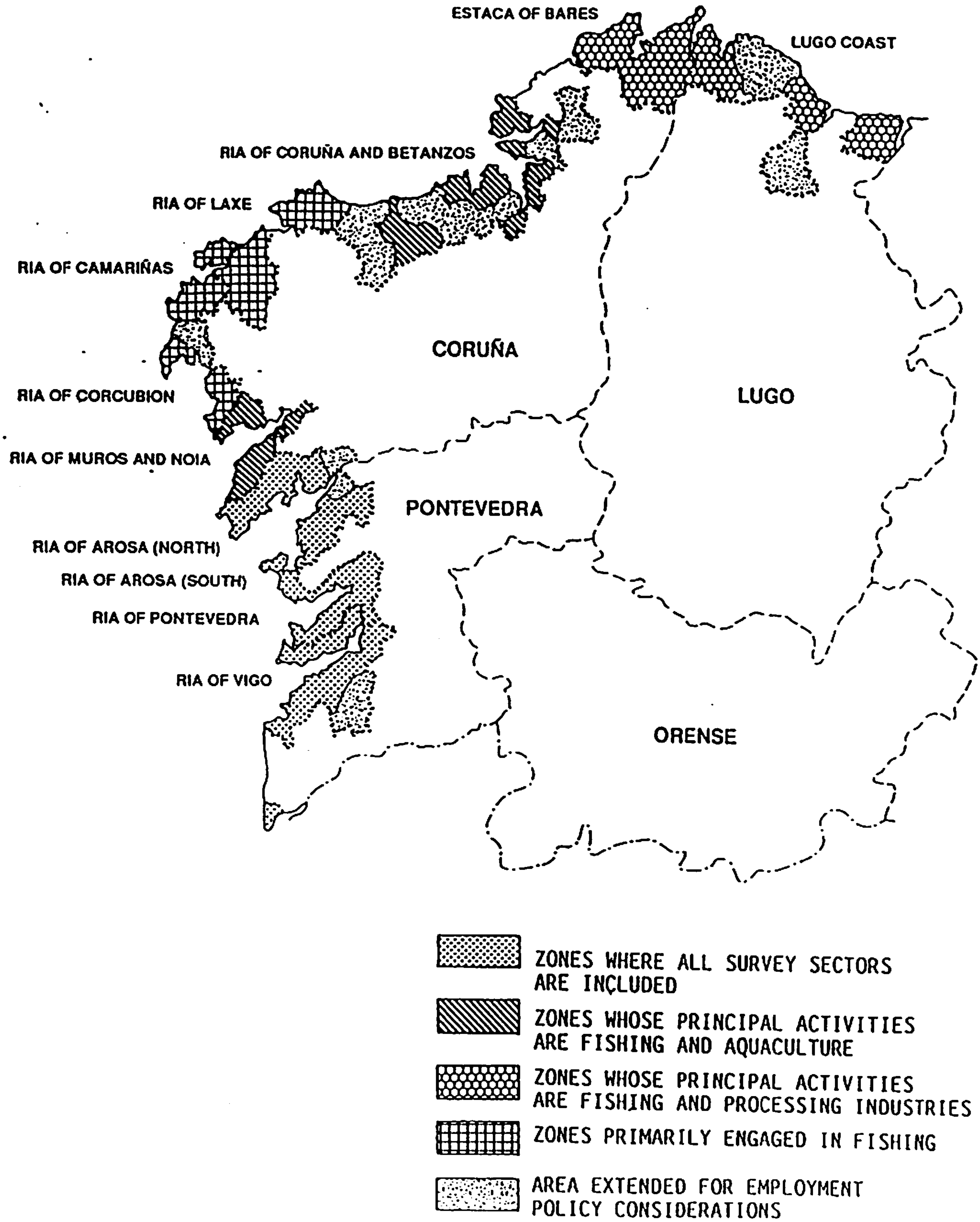


FIGURE 10

ZONES OF APPLICATION

REGION E.1: ASTURIAS

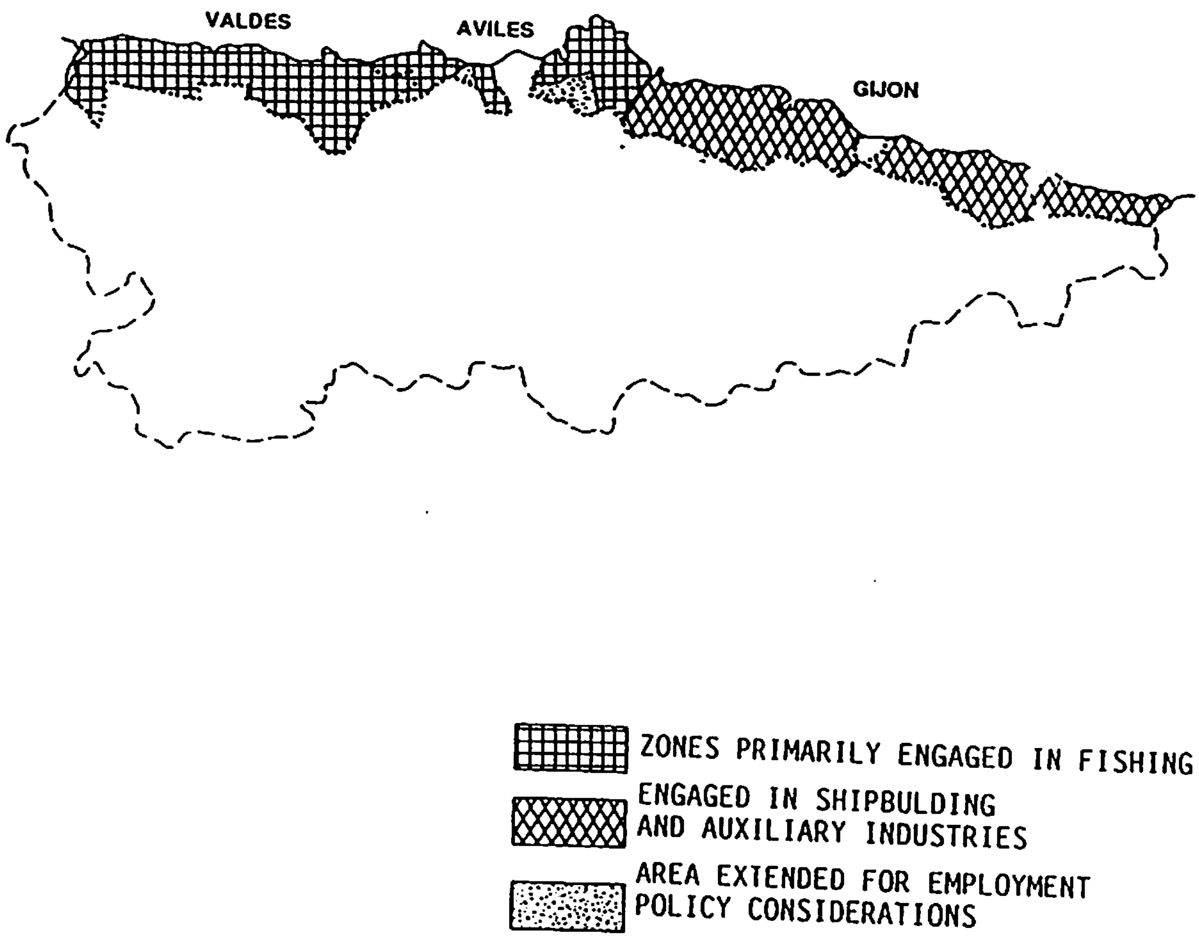
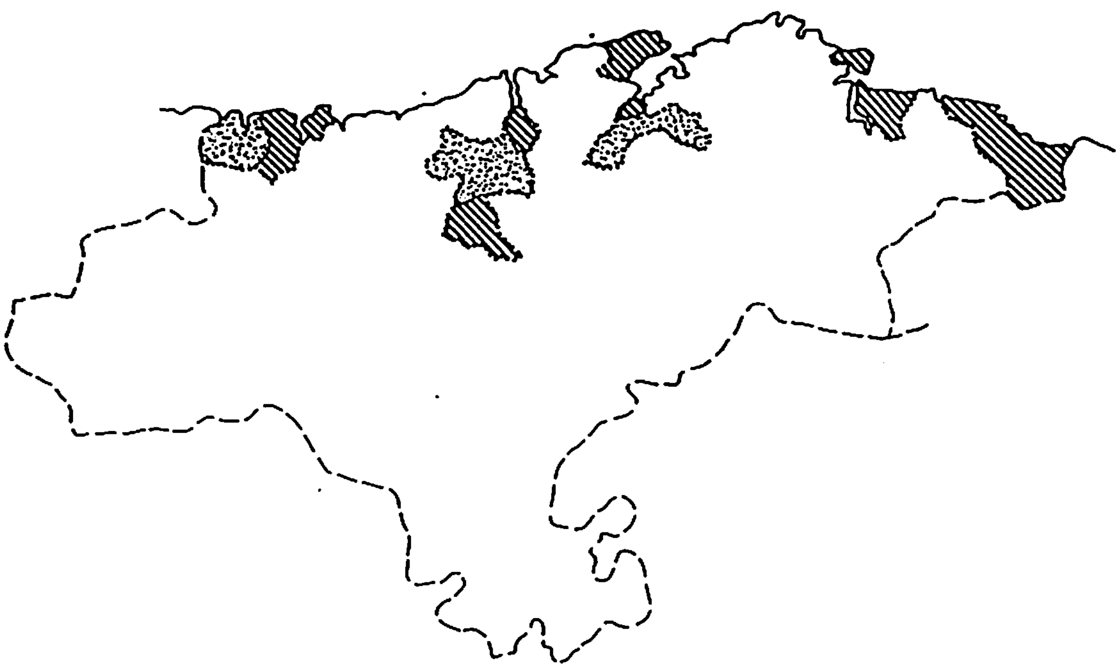


FIGURE 11

ZONES OF APPLICATION

REGION E.1: CANTABRIA

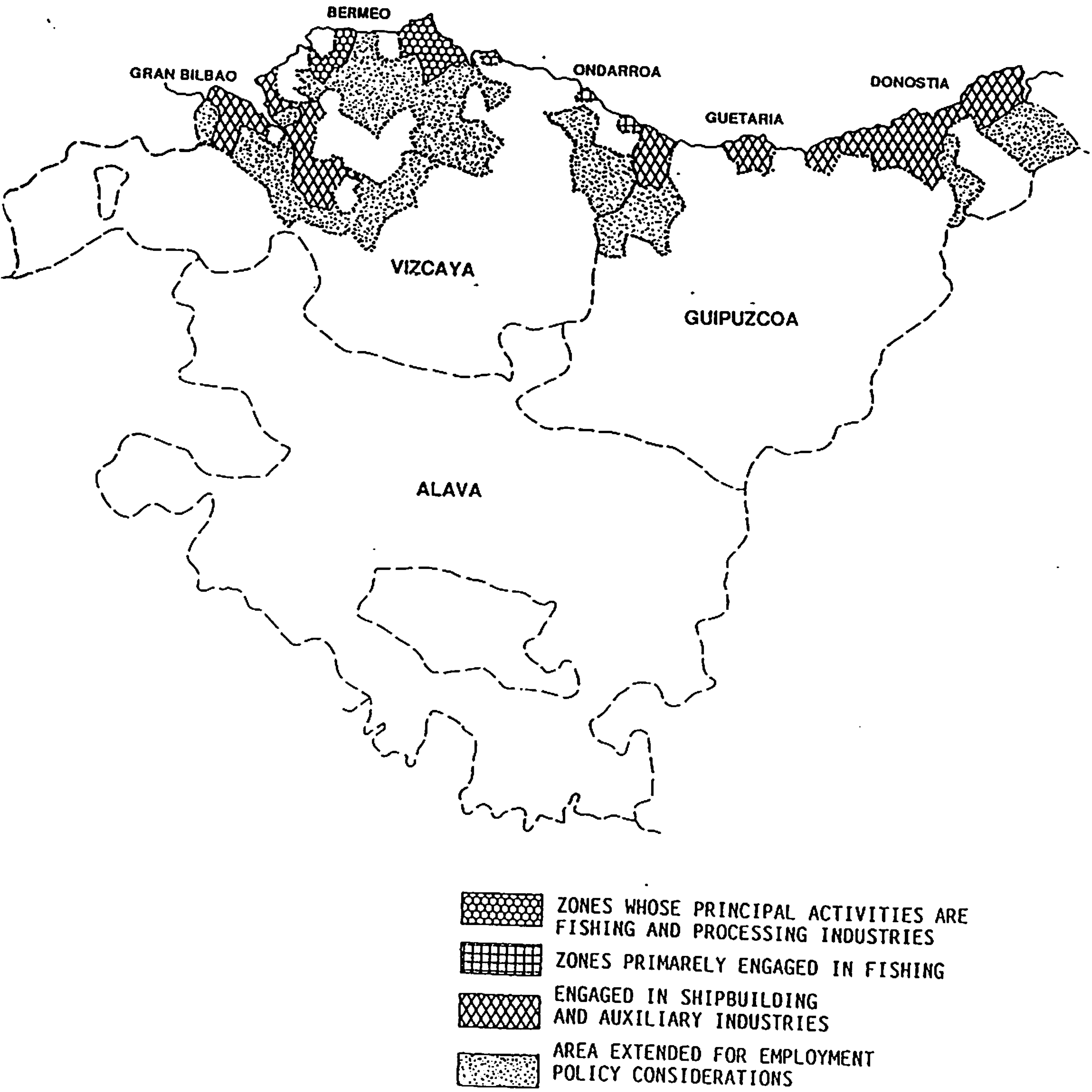


ZONES WHOSE PRINCIPAL ACTIVITIES ARE FISHING AND AQUACULTURE

AREA EXTENDED FOR EMPLOYMENT POLICY CONSIDERATIONS

FIGURE 12

ZONES OF APPLICATION
REGION E.1: BASQUE COUNTRY



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