



# ANDALUSIAN GOVERNMENT POSITION BEFORE THE REFORM OF THE COMMON FISHERY POLICY



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## 1. Introduction

The European Commission promotes a reform of the Common Fishery Policy as of 2013, to face and resolve the structural problems affecting this productive sector. Since the Green Papers for the reform of the CFP, the European Commission proposes lines of thought/development and proposes an extensive consultation with all the sectors and society in general, which will become the bases to define the new, EU regulatory framework with which to guarantee sustainable fishing, both from the stand point of the conservation of resources, as well as the economic profitability of fishing activities for companies, workers and the families that make a living from fishing.

In Andalusia, the fishing sector constitutes one of the main pillars of the economy and employment in 25 fishing municipalities located along the more than 800 kilometres of the Andalusian coastline. In recent years, the Andalusian fishing sector has advanced greatly in achieving the objectives of the Common Fishery Policy, adapting the fleet to the possibilities that the resources offer, resizing the fleet dependent upon the fishing grounds located in third countries, developing productive activities on land linked to fishing, making efforts to protect and preserve our own fishing grounds, etc. However, there is still a need to consolidate and modernise the sector to guarantee sustainable fishing.

Specifically, traditional local fishing is extremely important for Andalusia, and oblivious to the imbalances caused by the industrial fleets, needs greater attention and support in the framework of the new Common Fishery Policy. Likewise, the support of aquaculture, from the development and diversification in the areas that make a living from fishing, the adaptation of fishing boats for fishing practices that are compatible with the preservation and conservation of resources, the continuity of the management plans for the various fisheries, constitute, among other objectives, things to be considered when making the final decision.



## 2. Common Fishery Policy (CFP)

The CFP is composed of a set of rules, regulations and mechanisms that cover the activities of capturing fish, crustaceans, and molluscs—including aquaculture—as well as the processing and commercialisation of these.



The objectives of the CFP are the same as those of the common agriculture policy, established in article 33 of the EC Treaty:

- *Increase fishing productivity*, by promoting technical progress, guaranteeing the rational development of the fishing production, as well as optimal use of the production factors, especially labour.
- *Guarantee a fair standard of living*, for the fishing population, especially by increasing the individual income of those working in fishing.
- *Stabilize the markets*.
- *Guarantee the security of supplies*.
- *Guarantee consumers supplies at reasonable prices*.

The CFP covers the activities that are undertaken within the territory of a member State and in its jurisdictional or sovereign waters (Community Fishing Waters), or those activities performed by fishing vessels with the flag of a member State in the waters of third countries or in international waters, and that have four main scopes of action:

The conservation and sustainable management of fishing resources constitutes the essence of this policy at a time in which fishing activities have reached a high level of technical skill, especially in the industrial fleet segment, which must not diminish the objective of conserving fishing resources.

The common organisation of the markets for fish products adequately meets the offer and demand for the benefit of both producers and consumers. This is articulated around four essential elements: common commercial norms, producer organisations, stable price system with financial intervention mechanisms, and finally, norms that regulate commercial exchanges with third countries.

The fishing structural policy helps the “fishing” and “aquaculture” sectors adapt their equipment and the organisation of production processes to the demands imposed by resources and the market. In an effort to mitigate the possible social, economic and regional repercussions of the re-structuring of the sector, imposed by the critical situation of the various fishing populations, the reform foresees complementary socio-economic measures.

International relations in the field of fishing constitute another important aspect of the CFP. This constitutes two main aspects, knowing about the celebration of fishing agreements with third countries and the participation of the EU, as a member or observer, in the various international bodies that are responsible for fishing resources at high sea. Through actions at the international lever, the EU also seeks to contribute to guaranteeing a long-lasting use of fishing resources outside its own jurisdictional waters.

The common fishery policy contributes considerably to the exercise of responsible fishing both in and outside Community waters. Several integrated aspects are continually being consolidated to be able to more effectively manage the fishing populations, maintain employment in coastal regions and guarantee consumers with a safe and quality food supply.

The European Union has incorporated ten new member nations, of which seven are coastal nations (Poland, Estonia, Latvia, Lithuania, Slovenia, Malta and Cyprus), who want to continue

to perform an important function, together with their partners throughout the world, with their sights on the sustainable use of live resources in the oceans.

In 2004, the European Union provides some new elements for the application of the Common Fisheries Policy (CFP) reform, which, basically, were undertaken in 2002 and continued into 2003.

In this respect, the Council created seven Regional Consulting Councils to promote the CFP and greater involvement of the agents within the sector in its development. The Commission proposed the creation of the Community Fisheries Control Agency (CFCA) and in relation with its orientations, in terms of financial perspectives, the creation of the European Fisheries Fund (EFF) 2007-2013 substituted the Financial Instrument for Fisheries Guidance (FIFG).

With the daily application of the CFP, most of the activities arise from the concerns for the conservation and management of resources, both within as well as outside the Union. The key points are:

- In the framework for the financial perspectives for 2007-2013, the Commission presented a proposal by the European Fisheries Fund (FEP) aimed at facilitating the application of measures destined to guaranteeing sustainable fishing and the diversification of economic activities in fishing areas. This fund substitutes the Financial Instrument for Fisheries Guidance (FIFG)
- Created in 2004 by the Council, the Regional Consulting Councils will reinforce the participation of the various agents in the development of the fisheries sector. To date, seven councils have been created, which cover the following, among other areas; the Baltic Sea, the Mediterranean Sea and the Northern Sea, the existence of pelagic species and the high sea fishing fleet.
- The Commission adopted a communication that lists the means that will allow for the promotion of more environmentally friendly fishing methods. Its three main objectives are to reduce fishing to sustainable levels and maintain these levels, optimize the captures of target species and minimise undesirable captures, and reduce the impact of fishing on the habitat to minimal levels.

The legal framework that regulates activities linked to the sub-sector of fisheries in Spain is included in Law 3/2001, dated 26 March regarding State Maritime Fishing, which seeks to, in keeping with the principles and rules of the common fishery policy and the International Treaties and Agreements, cover the following points:

- The regulation of maritime fishing, which is a competence that is dependent exclusively upon the State.
- Establish the basic legislation to plan the fisheries sector.
- Establish basic legislation to plan the commercial activity of seafood products.
- Program research in fisheries and oceanography as a competence of the State.
- Establish a system of violations and fines in the area of maritime fisheries in external waters.

The main needs detected in the fisheries sector at the national level will be covered in the 2007-2013 period with the National Strategic Plan which establishes priorities, core objectives, financial resources and a timeline for the application of strategies, with special reference to the following:





- Management and adaptation of the community fishing.
- Sustainable development of: aquaculture, the processing and commercialisation of fish products, interior fisheries and fishing zones.
- Competitiveness of the fisheries sector, including the improvement of its structures and organisation and work environment.
- The conservation of human resources in the fisheries sector, by improving the professional qualifications, guaranteeing sustainable employment and reinforcing the position and function of women.
- The protection and improvement of the coastal waters linked to the fisheries sector.



### 3. Productive Framework



The economic and social importance of the fisheries sector forces us to define it as an activity that is not strictly extractive, but as a conglomerate of closely related activities, which, based on the management and use of marine resources and live aquaculture species, covers the economic activities developed by the fresh and frozen fish extractive fleets, the companies dedicated to purse seine fishing activities and marine aquaculture production companies. It also contemplates the traditional industries such as fish preserves as well as salted and smoked fish products. Likewise, there are other fishing related activities such as: refrigeration industries (cold storage, blast freezer), auxiliary industries (shipyards, dry docks, naval equipment) and commercialisation firms (wholesalers, retailers, merchants).

#### Basic data for the Andalusian Fisheries Sector

Currently, the Andalusian fishing fleet is composed of **1778 vessels** which accumulate some 54,776 GT and 157,240 Cv of power, of which 804 operate in the Gulf of Cadiz fishing grounds, while 901 are working the Mediterranean fishing grounds (therefore, 1705 vessels are operating in national fishing grounds), to which you must add another 73 vessels that work in third-country fishing grounds, basically trawler vessels dedicated to the capturing and freezing on board of crustaceans along the African coast.

Total Andalusian Fleet Year 2008	Fishing Ground Gulf of Cadiz	Fishing Ground Mediterranean	Total National Fishing Ground	Total Fishing Grounds 3rd Countries
Trawler	165	157	322	62
Purse Seine Fishing	100	106	206	3
Traditional Tackle	535	557	1.092	-
Long-line Fishing	4	81	85	5
Others	-	-	-	3
Total Fishing Grounds	804	901	1.705	73

Today, the Andalusian fishing production surpasses **72,500 tonnes** and the 251 million euro mark. The relative participation of each type of production shows that 62% of the total regional fisheries business turnover is provided by fresh fish sold in the Fish Market, followed by captures by the freezer fleet (18%), marine aquaculture (14%) and purse seine activities (6%).

Trawler fishing accounts for almost half of the total turnover of all commercial activities in the fish market. Purse seine fishing is the second category in terms of its commercial value, with a turnover that represents a fourth of the total in Andalusia.

The tradition fishing production, although these captures represent only 8.2%, in terms of commercial value, accounts for almost 20% of the total regional value. The importance of traditional fishing acquires even greater importance in terms of employment, as it generates more than 50% of the direct posts on board.

Moreover, these categories concentrate around 90% of the total regional business volume generated by fresh fish in origin.

Andalusian Fish Production. Year 2008	Captures (Tm.)	% captures	Value (Thousands of euros)	% value	Average Price €/kg.
Fresh, Auctioned Fish	58,946.70	81.3%	155,687.45	61.8%	2.64
Frozen Fish	5,679.44	7.8%	46,169.44	18.3%	8.13
Almadraba Nets	1,191.17	1.6%	14,576.99	5.8%	12.24
Marine Aquaculture	6,720.37	9.3%	35,395.94	14.1%	5.27
<b>Total regional</b>	<b>72,537.68</b>	<b>100.0%</b>	<b>251,829.82</b>	<b>100.0%</b>	<b>3.47</b>

The Fish Markets in terms of commercial volume are those in Cadiz, Isla Cristina, Almería, Caleta de Vélez and Punta Umbría, which jointly sell more than half of the total regional tonnage. Other important markets are those in Barbate, Motril, El Puerto de Santa María and Sanlúcar de Barrameda, which account for another 20% of all fresh fish auctioned off in Andalusia.



It can be said that Andalusia presents a noticeable specialisation in marketing in origin of sardines, anchovies, horse mackerel, shrimp, octopus, red sea bream, Venus Shells, Norwegian lobster or common cuttlefish, the tonnage for all these species accounts for 70% of all fish auctioned at the fish markets found in the region.

In Andalusia there are **four almadraba fishing** operations located in Barbate, Tarifa and Conil, commercialising a capture volume of around 1195 tonnes, which generates a commercial turnover of almost 15 million euros.

The **captures from the Andalusian freezer fleet** fishing in third country waters, landed and auctioned in Andalusia reached some 5600 tonnes and a value of approximately 46 million euros. These landings refer to crustaceans, which with common shrimp and Blue-and-red shrimp are the two species that lead the quota within the product basket, accounting respectively for 47% and 32% of the commercial value.

Fresh production commercialised at the Fish Market by Fishing Categories. Year 2008	Captures (Tm.)	% captures	Value (euros)	% value	Average Price €/kg.
Trawler	19,481,429	33.0%	74,700,290.99	48.0%	3.83
Purse Seine fishing	29,174,391	49.5%	39,112,017.58	25.1%	1.34
Traditional Tackle	4,850,987	8.2%	28,224,729.26	18.1%	5.82
Hydraulic Dredge	2,644,076	4.5%	6,955,116.80	4.5%	2.63
Rake fishing	2,152,431	3.7%	3,444,098.49	2.2%	1.60
Long-line surface fishing	587,739	1.0%	3,058,796.52	2.0%	5.20
Shell fishing by immersion	34,114	0.1%	153,722.10	0.1%	4.51
Almadraba Nets	20,917	0.0%	37,959.87	0.0%	1.81
Mussel trays	612	0.0%	721.20	0.0%	1.18
<b>Total Andalusia</b>	<b>58,946,697</b>	<b>100.0%</b>	<b>155,687,452.81</b>	<b>100.0%</b>	<b>2.64</b>

In terms in origin, the Andalusian freezer production proceeds, for the most part, from the fleet that operates in the fishing grounds of Mauritania, Guinea Bissau, Angola and Congo, which, together with the vessels operating in the Gabon and Nigeria fishing grounds, provide 88% of the tonnes commercialised by the Andalusian freezer fleet sailing under a Spanish flag.

Currently, the Andalusian **marine aquaculture production** surpassed the 6800 tonne mark for fresh products, with a value of almost 36 million euros.

Andalusia focuses its marine aquaculture production on the growing of fish, which is the most commonly found along the coasts and the most developed. Fish accumulate 89% of the total tonnage associated with the production and 94% of the commercial value of all regional aquaculture. In second place are the molluscs with 10% of the tonnage and 2% of the turnover, and finally, crustaceans account for the rest.

The **traditional preserve industry**, salted and smoked fish is composed of 17 companies, which represents 56% of the total Andalusian fish processing sector. These companies are located in the municipalities of Ayamonte, Isla Cristina, Barbate, La Línea de la Concepción, Tarifa and Malaga. The province of Cadiz boasts the largest concentration of traditional industries with 47% of the total, followed by the province of Huelva, with 33% and finally Malaga with 20%.



In terms of the types of products the traditional Andalusian industry offers, the traditional production of fish processing products come from productive processes that are well differentiated: preserves, salted fish and smoked fish. The traditional nature of each of these is a differentiating element when compared to the rest of the fish processing industry. The preparation of craft products implies such aspects as manual removal of heads, guts and peeling, washing with fresh water and the non utilisation of chemical preservatives.



The analysis of the 2008 production shows that the traditional fish industry in this region generated more than 26,248 tonnes, for a turnover of 171.03 million euros. This translates to a 16.3% growth of the sector in terms of production and 8.3% in terms of turnover.



In terms of the concentration of the various productive processes, the manufacturing of preserves includes 64.4% of the tonnage produced by the traditional industry, followed by smoked (fish) which accounts for 17.3% and salted (fish) which ranks with 15.3%. To this, another 3.0% must be added, which is linked to other processing products such as pre-cooked dishes.

The **wholesale fish activity** in Andalusia is made up of 640 firms, and a total of 864 establishments, which register a turnover of more than 1700 million euros, and generate almost 6600 jobs in Andalusia.

### Added value and employment

In 2007, the Andalusian fish sector generated a gross value added of 209.49 million euros, which was 0.14% of the regional GDP (which was 146,707.32 million euros). In a wider sense, the direct activities (captures and aquaculture) concentrated 2.4% of the gross value added generated by the region's primary sector, while the processing industry represents 1.9% of the Andalusian agri-supply network activity.

In spite of this apparent limited importance, the Andalusian fishing sector presents connotations indicating that certain coastal municipalities depend upon the sector for the generation of employment, contributing to their development. This is the case of the towns of Isla Cristina and Barbate where fisheries represent some 20%.

**Extractive activities** generate an added value of 124.62 million euros of which 67.8%—84.44 million euros—correspond to fresh fish, to which 28.86 millions coming from freezer activities must be added; this activity is included in the agreements with third countries and the 11.31 million euros that is generated by the *almadraba* net fishing activities.

In 2007, the **Andalusian aquaculture** generated an added value of 25.76 million euros, which translated into an inter-annual growth of 20.1%. Based on the type of aquaculture, marine aquaculture concentrated 79.2% of the gross value added (GVA), while that generated by continental waters presented a gross value added of 5.35 million euros in 2007.



The **fish processing industry** added some 58.5 million euros to the Andalusian economy, which provided 0.04% of the Andalusian GDP, of which 39.7 million euros were generated by the traditional preserve, salting and smoked fish industries.

Currently, **employment dependant upon fishing** in Andalusia, which can be estimated in some 27,800 workers, of which, 34% perform their tasks in direct activities (linked to the extractive fleet and aquaculture production) and 66% in indirect activities, with special relevance in processing companies and wholesale and retail sellers of fish products. In geographic terms, the generation of fishery-related employment is greatly concentrated in the provinces of Cadiz—with 27% of the employment generated by the Andalusian fishery sector—and Huelva with 22%.

## 4. Traditional Local Fishing

The current definition of traditional local coastal fishing fails to adjust to our fleet and consequently to our needs. Other aspects must be taken into consideration such as the freshness, the daily fish, micro enterprises and family businesses. This type of capture uses practices that are more respectful and less aggressive to marine resources, and constitute a sustainable activity model that enriches the economic and social fabric of the municipalities dependents upon fishing, thus it is essential to articulate a set of measures that promote the modernisation and development of traditional coastal fishing along the entire Andalusian coast.

To guarantee the profitability of the traditional fleets, a management system for the resources must be designed that takes into consideration the maintaining of the principle of the 12 nautical miles, the sustainability of the activity, balance, transparency, control and greater co-management between the fishing sector and Public Administrations. In this sense, the establishment of total allowable catches (TAC) and individual, transferable fishing quotas (ITQs) limits the exclusiveness and the complementarity, but does not guarantee the effectiveness and the sustainability of the fisheries. Consequently, adapting the extractive capacity of the Andalusian fishing fleet to an optimal regimen when working the fishing grounds must be accompanied with differentiating strategies, based upon systems of traceability of the products sold coming from the local traditional fishing, which provides information about where the capture is from (selective, fresh and environmentally friendly), as an added, differentiating value in the markets.



Likewise, the management plans must be applied to the traditional local fishing either by categories or ports, seeking to improve the resources and their protection in the light of fleet's excessive capacity. Among the interventions for the protection and regeneration of the most important fishing grounds, are the declaration and management of protected fishing areas, the installation of conservation elements, the development of actions to regenerate fishing resources and the inspection plans and reinforcement of measures to avoid illegal fishing practices.

Finally, it is essential to maintain the aids for the fleet to comply with the objectives of competitiveness, safety and living conditions on board, improvement of energy efficiency and selection of fishing equipment. In this sense, the prevention of occupational hazards based on the modernisation of the facilities on board and the improvement of professional skills and training for fishermen and ship's husbands dedicated to traditional local fishing is crucial to minimise the risks for the safety and health of those working on board fishing vessels.

Likewise, **investment in R+D+i** could generate solutions for the lack of profitability obtained from the Andalusian fishing fleet in recent years, due to the increase of fuel prices, through advances in the research of new fuels, fuel-saving systems or the use of alternative power. To this end, the development and implementation of new technologies to improve power efficiency in the fishing industry seeking to reduce fuel consumption, the incorporation of renewable energy and the decrease of polluting emissions have become a key factor for the survival of the companies, which is compatible with the model of sustainable activity while at the same time environmentally friendly.

In response to this situation, the Andalusian regional Public Administration supports all those projects that promote the use and fishing practices that tend towards decreasing the consumption of fuel, the reduction of polluting emissions and adapting to new, environmentally-friendly power sources and decrease the dependence on fossil fuels. Finally, it is necessary to continue to develop and apply technological advances (innovative designs and materials for fishing equipment and gear), which allows for better identification of the species (decreasing unwanted captures) and improved management of the wastes generated, to reduce the negative effects of the fishing activity in terms of the environment.



## 5. Management and conservation of fisheries

It is necessary to bear in mind an ecosystem focus as an integrating focus for the resources, the environment and the economy of the area. Sustainable development of fisheries and marine activities, and the protection of the environment, together with the conservation of the marine biodiversity, continues to be one of the greatest challenges for this Andalusian Regional Ministry of Agriculture and Fisheries. As a consequence, interventions must continue to be developed—from a stand point that contemplates the peculiarity of the Mediterranean and the Gulf of Cadiz as specific fishing grounds—that have the following objectives: **the protection and regeneration of fishing grounds by declaring and managing protected fishing areas, the installation of conservation elements together with the development of actions for the regeneration of fishing resources, and the reinforcement of inspections to avoid illegal fishing practices.** On the one hand, this strategic line responds to the EU demand of integrating environmental measures into the various policies of the sector—in this case fishing policies—while on the other hand, it contemplates protection measures to preserve biological diversity.

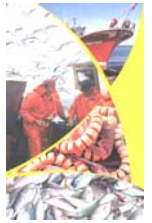


For the protection and regeneration of fishing grounds, the regional Government considers that it is necessary to continue with the **declaration of reserve fishing areas that allow the regeneration of the fishing grounds and the sustainable development of the fishing activity.** These areas, the selection of which must bear in mind their state of conservation, must have certain characteristics that allow the improvement of reproduction conditions of the fish species of interest and the survival in their juvenile forms.

In this sense, it is crucial to improve the information about the target species of the main Andalusian fisheries, as well as selectivity in the tackle and gear used by fisheries, the possibility of implementing systems for the administration of accessory captures and discard, the impact of the fishing and aquaculture activities on the marine ecosystems along the Andalusian coast, plus the development of awareness programs about the impact of the fishing and aquaculture activity, and the development of campaigns promoting responsible consumption of Andalusian fishing products. Other measures contemplated along this line refer to the creation of artificial reefs, preferably for the deterrence of the illegal use of fishing equipment, along with measures to regenerate resources by repopulating species of fishing interest.

The new financial instruments must support the implementation of management plans that include the adaptation of the fleet to the resource possibilities, including amongst other options, the retiring of unprofitable vessels, socioeconomic measures, temporary cessation and collective actions. These financial instruments must also include the support of the *almadraba* tuna fishing and shellfish activities.

The objective continues to be the **adaptation of the extractive capacity of the fleet to achieve the sustainability of fishing resources**, by adjustment plans that seek to regulate the volume of captures of certain species with regards to their available populations, thus safeguarding the capacity of the species to be reconstituted (permanent cessation such as scrapping or the assignment to alternative activities; temporary cessation depending on the fishing methods; and grants for temporary cessation not included in adjustment plans due to natural disaster, closing of fishing grounds for reasons of public health or suspension of fishing agreements).



However, the development **of socioeconomic measures and complementary social protection** to those established in the fishing effort adjustment plans, must guarantee income levels and safeguard acceptable working conditions for the crew (individual subsidies, voluntary redundancies, training, **grants for young fishermen** to acquire vessels for the first time, early retirement to permanently abandon fishing and re-conversion bonus).



Finally, collective actions developed by operators and associative bodies in the fisheries sector, aimed towards the improvement in competitiveness and the **decentralization of the fishing management, bringing the task of decision making closer to the fisherman.**



## 6. External dimension of the fisheries sector

Defence of the maintenance and renovation of International Fishing Agreements: The Andalusian fisheries sector requires the maintenance of fishing agreements with third countries, on the bases of fisheries that are profitable, sustainable and respectful to the use of resources. A large part of the Andalusian fleet fishes thanks to bilateral agreements between the European Union and third countries such: Morocco, Mauritania, Guinea-Bissau, Guinea-Conakry, and the Ivory Costa, amongst others, by which the fleet has access to non-EU fishing resources. These agreements are extremely important to the Spanish fishing companies, as they allow both the traditional fishing fleet and the large vessel fleet work in fishing grounds with surplus resources. The Agreements must offer conditions that allow the feasibility and profitability of all the operations necessary to perform responsible fishing practices. As a consequence, they must eliminate the restrictions deriving from the exclusivity clauses, which limit the fishing possibilities in third countries. The new CFP must respond to the ship owners, which, due to a lack of agreement or technical limitations, cannot maintain the ships operating.

The organizations representing the sector must participate both in the negotiations of the technical fishing conditions as well as in the follow-up of the agreements. To guarantee the activity of the ships operating in third-party fishing grounds, all competent government organs must prioritize the **renewal and stability of the Agreements**.

Thus, it has been proposed to present before the European Commission the need to reformulate the nature of the Fishing Agreements, with the objective of promoting direct investments in third-party territories that will generate sustainable development, acting as a complementary measure to the traditional quotas negotiated per operative ship.

This strategy could be articulated by means of the creation of a specific Commission made up of representatives of the frozen fishing activity and technicians of the competent administration, to raise the real demands and necessities of the national frozen food companies at the forums, where the new EU fishing agreements with third countries are designed.



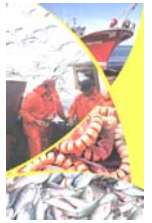
Study of the hygienic-health harmonization between the European Union and third countries in response to the commercial interests of the Andalusian frozen food companies. Currently, the “Mixed Societies” implemented in countries such as Gabon, Mozambique, Senegal, Angola, Republic of Congo, Ivory Costa and Guinea Bissau, present problems in the export of their fishing productions to the European Union. This is due to the fact that each third country has its own hygienic-health regulatory scheme that is applicable to the fishing products, and this fails to meet the regulations imposed by the E.U.



All this leads to the fact that the productions of some countries, which do not have the appropriate permits to for their imports which stop complying with their supply commitments acquired with the EU. To solve these limitations, the creation of a regional Commission has been proposed, made up of representatives from the sector and technicians from the corresponding administration, with the objective of promoting the specific demands related to the problems of health harmonization of the fishing productions coming from the Mixed Societies at the EU level.



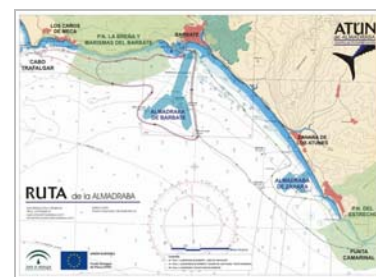
## 7. Socio-economic Diversification of the Fisheries Sector



The Regional Ministry of Agriculture and Fisheries **backs the diversification and sustainable development of the fishing areas and communities**; this being understood as the growth that generates new sustainable sources of income and satisfies the necessities of the present generations without compromising the possibilities of future generations. **Women, in general, and the wives of the fishermen, in particular, must play an active role in the attainment of the objectives of diversification and development.**

The organizations of the Andalusian fisheries sector must be actively involved in the creation of the Groups of Fishery Development that will promote the socioeconomic diversification of the sector in those areas and municipalities dependent upon fishing. **To involve the Andalusian fisheries sector in the participation and leadership of projects that favour the diversification and administration of Andalusian coastal areas, by creating fishery development groups that energize the self-management of the activity and the resources by the sector's associative bodies.**

The implementation of development fishery groups in the Andalusian municipalities that are dependent upon fishing activities will be a space where proposals by economic and social agents can make proposals that favour the development and preservation of the social and productive fabric of the said municipalities. Through these groups activities may be proposed and managed that are directed to the protection of natural resources.



Therefore, the development fishery groups to be established in the Andalusian municipalities dependent on fishing activities will be the framework reference so that those associative bodies linked to fishing, which are interested in organizing their productive management systems will be able to find in these the consultancy and public backing necessary for their objectives.



The diversification of the fisheries sector must be promoted from within an integrated focus of sustainable development of fishing in an economic, social and environmental way and must be aimed towards the progress and improvement of the standard of living in those areas dependent on fishing. In recent years, the Regional Ministry of Agriculture and Fisheries has been promoting investment projects to modernise and improve infrastructures and equipment in Andalusian facilities for the production, processing and commercialization of fishing and aquaculture products. This tendency must continue to be consolidated through the vitalization of the activity at fish markets, expedition centres, processing plants and aquaculture facilities, as well as the foundation of this fishing product trade within the local dynamics.

The public actions must also be focused on local diversification and socioeconomic development from the use of the potential of sustainable tourism that generates employment and wealth related with the appreciation for cultural heritage of fishing and the environmental protection of coastal areas. For the revitalization of the socio-productive fabric of the municipalities dependent upon fishing in Andalusia, structures will be developed to set up eco-tourist activities related to the marine environment, in which the associative bodies of the sector can actively participate along with local and regional institutions.

## 8. Commerce and Fishing Markets



Today, commercialization conditions constitute a key factor to provide food products with an appropriate value, both at markets in origin and in destination. Advances in the field of information technology, the growing degree of consumer knowledge and the importance of international commercial transactions, are modelling a more and more dynamic market in which profit margins of the sector's professionals depend more and more on the **quality and final image of the products on the market.**

The increase in competition in the markets, a result of the globalization process, affects, amongst other things, the commercial dynamics of fish products. This fact constitutes an additional challenge for the Andalusian fishing sector. The increase in sector's competitiveness depends on its ability to adapt fishing activities to be able to face the limitations imposed by the available resources and by market demand.

Moreover, the European integration process has had a major impact on the regional economies, which, such as that of Andalusia, has adapted to a more demanding competitive environment in terms of productive efficiency and innovation.

**The demands of professionalism, information and technology in the commercial sector have substantially increased, generating new challenges for the competitiveness of many small-and medium-sized commercial enterprises in Andalusia.**



In this scenario, the intervention of **fish markets** as transparent modern first sales markets and promoters of concurrence between purchasers, the performance of health controls, and compliance with minimum sizes for the marketed captures, statistical control, etc. are growing in importance.

The sector must improve its organization. In this sense it is necessary to highlight the importance of OPP as a vehicle for the improvement of the commercialization and to guarantee the supply at the market. Within this situation, supporting the organizations within the fishing sector, promoting initiatives and coordinating strategies within the sector and professionals constitutes a priority factor: it is necessary to energize and strengthen the associative fabric to adopt collaboration agreements in the various business environments: innovative actions that stimulate collective production, promote professionalism in the management of these organizations for the design, commercialization and promotion of the products.



The fisheries sector must regulate itself **to develop an integral management of Andalusian fishing production** by means of coordinating the extractive-productive, processing and commercialization activities that offer greater control of the availability and the distribution channels and, in consequence, generate more added-value. The Government will support the development of cooperation and collaboration agreements between operators of the various activities within the fishing sector, in an effort to be able to offer greater added value to clients,

respond quickly to diversity, cover deficiencies in productive resources, and cushion the risks deriving from participating in a global economy.

Guarantee traceability, labelling and transparency of prices. Today, promoting the quality of Andalusian fishing and aquaculture products constitutes a priority to reach higher quotas of commercial **differentiation on the market, by means of compliance with the regulations in terms of labelling and traceability, the development and promotion of quality brands,** promotional actions and the organization or participation in trade fairs and events aimed at reinforcing the quality of Andalusian fishing products.



All the fishing and aquaculture products must be marketed under the best health conditions. Therefore, the standardisation of the health quality standards at handling facilities must broadly cover from the elaboration of good practices guides for the maintenance of appropriate quality and hygiene parameters for fishing products on board, to the installation of general plans of hygiene and laboratory analysis for the various productive processes, strategies that will facilitate the achievement of higher levels of food safety for fishing and aquaculture products.



There must be the necessary financial instruments for fishing to sell and improve the information from the sector to technicians and consumers. To achieve greater business cohesion, it is essential to speed up the communication systems between the Andalusian companies dedicated to this activity, by applying IT technology to work in networks, thus promoting the development of cooperation networks in different fields and areas of knowledge. For this, computer equipment that is suited to the work in networks is necessary, as well as technical help and training, regarding the equipment, personnel and the effective use of these new technologies.



## 9. Development of Marine Aquaculture

The Andalusian Regional Government supports **innovation and technological development** for the progress of aquaculture activities. The competitiveness of these is due to the constant improvement of technical and productive procedures in harmony with the sustainability of the environment.

Aquaculture is not an appendix to fishing and must be treated differently in the new CFP. It must guarantee market supplies and contribute to the socioeconomic development of coastal areas with the creation of new jobs and productive activities.

Supporting companies to carry out new projects, diversification of species, etc. In Andalusia, there are currently 102 authorized companies (a company is understood as any legally established firm, where an individual persona or not), that incorporate a total of 177 marine aquaculture establishments. The business fabric of Andalusian aquaculture is made up of small- and medium-sized enterprises, of which 79% are micro-companies (< 10 workers), 17% are small companies (10-49 workers) and the remaining 4% are medium (50-249 workers). In 2007, the Andalusian marine aquaculture production almost reached 7,000 tonnes of fresh products, with a value of some 44 million Euros, and employed 660 workers.

One of the main challenges that the Commission must confront is to **simplify the complex regulative framework that currently regulates aquaculture activities**, to strengthen its development and to improve production levels.



Andalusian aquaculture must be developed in a scenario of compatibility with the environment and profitability.

In Andalusia, there are two types of production areas that are well differentiated from the points of view of the environment and the type of cultivations and establishments that are carried out in them: **aquaculture areas on land and aquaculture areas at sea.**

The aquaculture areas on land (inter-tidal areas and the continental coastal fringe), mainly carried out on the south Atlantic

fringe, includes 88% of the authorisations and 94% of the authorised surface area. The types of establishments located in this area are divided into three groups: those located in natural areas, those located on the mainland and cultivation parks.

The facilities in natural areas are made up of salt ponds and transformed wetlands, 90% are located in the province of Cadiz, 9% in the province of Huelva and only 1% in Seville.

The **mollusc cultivation areas** are distributed between the provinces of Huelva and Cadiz. The authorised surfaces for each cultivation parks in Huelva are much smaller than those of Cadiz, because the management models are different: in Huelva individual parks prevail while in Cadiz they are cooperatives.

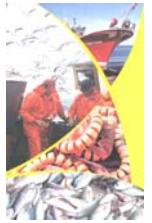
Fish **hatcheries, nurseries, and fattening farms** and micro-algae production facilities are the various types of establishments located on the mainland.

In **open sea aquaculture**, there are two types of establishments: cultivation in fish cages and others with vertical-type cultivations (trays and long-lines). Despite representing fewer establishments (12%) and less authorised surface (6%), they generate 35% of the economic value and 50% of the biomass of the entire production generated in Andalusia.





R+D+i must play a very important role in the growth of this sector and in the use of all its potential. One of the main problems that Andalusia is currently facing in aquaculture is the necessity **to improve its productivity levels by supporting the installation of innovative productive processes in the marine cultivation environments, and the adoption of new systems for the production, handling, conservation, identification, commercial administration, distribution and sales of the aquaculture products.**



From the various competent administrations, jointly with the private sector, there is a need to carry out major efforts to ensure that aquaculture is an attractive activity for investment, allowing research to be reinforced from private initiatives.

With this strategic line, it is intended, firstly, to strengthen the business fabric by means of increasing the business structures dedicated to aquaculture in Andalusia. Secondly, to modernize the existent marine infrastructures, impelling the use of more efficient technologies in the continental and aquaculture productions, to achieve a production that differs from the rest of the market, based on the quality and having become more technical. And thirdly, a diversification of species is required as a measure by which to consolidate the productive structures and to resolve the problems of the main products when faced with the various national and trans-national scenarios. For this, the Regional Administration proposes the concession of grants for projects for the cultivation of new species, throughout their various phases of productive development.



## 10. The Consensus between the Fishing Sector and the Andalusian Administration



After the publication of the Green Papers for the Reform of the Common Fishing Policy, the Andalusian fishery sector and its regional management were mobilized to reflect on and present the future proposals that are included in the this document.

Working Groups were created for the extractive fishing sector, for the sector of marine aquaculture and for the industries of commercialization and processing of fish products, which have debated and concluded on specific proposals.

The Workshop on the Reformation of the Common Fishing Policies, which took place in Granada on the 9<sup>th</sup> and 10<sup>th</sup> July 2009, under the motto, “We back the sustainable development of fishing”, organized by the Andalusian Administration and the Ministry of the Environment and Rural and Marine Affairs had special relevance. The collaboration received from the European Commission contributed decisively to deepen in the analyses and in the strategies that the fishing sector requires. The conclusions of this Workshop constitute a faithful reflection of the concerns, necessities and future proposals suggested by Andalusia.

Nevertheless, there is still a long road to travel until the adoption of the new regulations and directives that make up the new CFP. Andalusia will continue to work so as to continue transferring its worries and proposals with regards to its sectors of fishing, aquaculture, processing and commercialization and of its areas that live off fishing.

