DOMESTIC FISHERY

The fishing industry in Spain is a fundamental element in the socio/economic structure of the country and is one of the major sources of food production. Since the liberalization of the Spanish economy in the late 1950's, the growth of the Spanish fishing industry has been exponential. The Spanish fishing fleet has increased from obscurity to third in the world behind Japan and Russia in terms of T.R.B. power and technological advancement. However, catches have decreased dramatically since the mid-1980's resulting in overcapacity for the fleet, and the industry has searched out ways to secure additional fishing grounds, as well as protecting their interests in existing zones.

Spain was the first country in Europe to extend the radius of its fishing activities to the Southern Hemisphere, the Atlantic Ocean, the Pacific and Indian Oceans. As a result, the Spanish fleet has been involved in territorial disputes over fishing grounds in Canadian waters, waters off the coast of Namibia, and in the fishing areas around the Falkland Islands. Declining stocks in these areas and others have forced the Spanish government to seek fishing agreements from New Zealand, Australia, Chile, South Africa and India.

LANDINGS

Data published in *The Spanish Economy: Monthly Report* for October 1992 indicate that for the fourth consecutive year in 1991, production in the fisheries sector showed a recessive performance with a significant drop compared with 1990. Landings for sea fish at Spanish ports or produced in hatcheries fell by 12% in 1991, with total fisheries production declining by 2.1% The worst performance was evident for landings of frozen fish and production in fish ponds and hatcheries, while fresh and refrigerated fish did not show as dramatic a decrease in landings. Frozen fish showed a drastic decrease for 1991 with a decline of 22.7% in landings, after having shown increases for 1989 and 1990. Landing for fresh fish fell by 3.6% in volume over 1990, but increases in prices for fresh fish led to an overall increase of 0.3% in value terms. By fishing region, the areas most heavily affected by the decreases in landing volumes are as follows: 1) North-west (-17.9%); 2) Canary Islands region (-12.9%); 3) Cantabria (-9.4%); 4) Tramontane coast (-8.1%); and, 5) the South Atlantic region (-2.7%). The negative performance in fish production may be attributed to two basic factors. On the one hand, the legal framework which regulates operations at the international level and on the other hand, the state of conservation of fish resources, especially in the area of European Community waters.

SPECIES

The most recent statistics for the Spanish domestic catch are Food and Agriculture Organization (FAO) data for 1990. Nominal landings for that year indicate approximately 213 different species accounted for within the national catch. Leading species in order of magnitude for Spain included: 1) European pilchard, *Sardina pilchardus* (231,786 metric tonnes); 2) blue mussel, *Mytilus edulis* (173,300 metric tonnes); 3) cape hakes, *Merluccius capensis, Merluccius paradox* (155,000 metric tonnes); 4) yellowfin tuna, *Thunnus albacares* (113,974 metric tonnes); and, 5) skipjack tuna, *Katsuwonus pelamis* (105,897 metric tonnes).

EXPORTS

Spanish exports of fishery products showed an increase of 5.9% in 1991, with the biggest growth appearing for molluscs and fish preserves. Sales of crustaceans abroad grew by only 2.3% in value,