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REPORT

FISHERIES, AQUACULTURE AND THE PROCESSING INDUSTRY IN SPAIN

CHALLENGES FOR THEIR SUSTAINABILITY

CONCLUSIONS, CHALLENGES FOR THE FUTURE AND PROPOSALS FOR ACTION



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INTRODUCTION

The purpose of this report is to analyse extractive fishing, aquaculture and the processing industry, within the framework of the European Green pact and the Common Fisheries Policy (CFP) and the necessary adaptation to the new Law 5/2023, which establishes the guiding principles of fisheries policy for the coming years, and which will be complemented by a law to modernise control and inspection and the sanctioning regime, and another aimed at digitalisation, management and marketing.

The analysis will be carried out from a threefold perspective: conservation of aquatic ecosystems; social cohesion and employment; and economic activity. Three interrelated and essential axes to ensure the future and structuring of communities, the provision of public goods associated with these activities, landscape protection, inter-territorial equity, the offer of alternative economic activities, the sustainable provision of food of aquatic origin or the safeguarding of cultural heritage, reconciling all of this with the protection of biodiversity.

To this end, a diagnosis of the socio-economic situation of the sector, its contribution to European strategies, and the reforms and investments planned for its transformation and digitalisation are addressed, based on the four cross-cutting axes of the National Plan for Recovery, Transformation and Resilience (PRTR): ecological transition, digital transformation, gender equality and social cohesion.

In this regard, it should be noted that the Addendum to the PRTR published in September 2023¹, includes among the actions corresponding to component 3 (environmental and digital transformation of the agri-food and fisheries system) the revision of the national regulatory framework for the regulation of sustainable fishing, which will promote economic and social sustainability as a central element of fisheries management, grouping together in a single law the currently dispersed regulations that will adapt the management of the different gears, modalities and censuses of fishing grounds, and a Plan to promote sustainability, research, innovation and digitalisation, aimed at foster-

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- 1 Government of Spain, Addendum. Second Phase of the Recovery, Transformation and Resilience Plan for the Kingdom of Spain. Boosting strategic industrialisation. Executive Summary (September 2023).

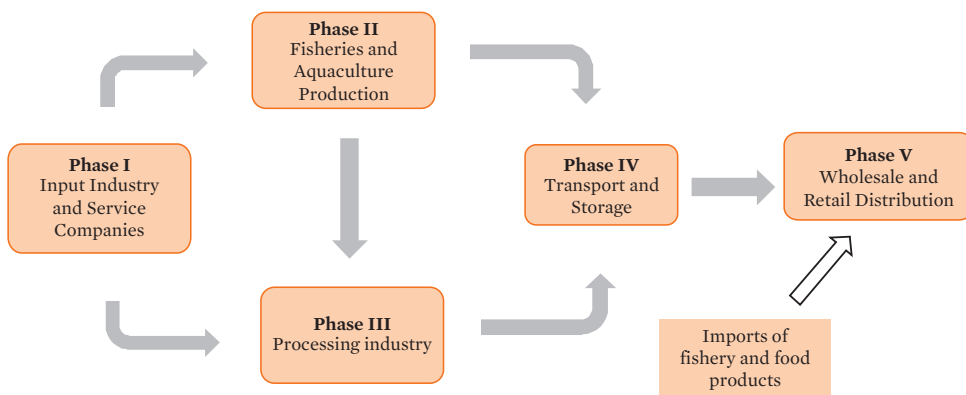
ing technological development and innovation in the fisheries and aquaculture sector to promote the blue economy.

In this diagnosis, it is important to explain some basic concepts of each activity and how they fit into the productive structure, starting with what is known as the Fisheries Food System (FFS), as it is not only a question of determining the direct contribution of fishing, aquaculture and the processing industry to the economy, but also of remembering their drag and pull effects on other activities and on the socio-economic fabric of the territories where they are located. On the other hand, given the specific nature of the concepts used throughout the report, a final glossary is included with the main definitions.

The fisheries food system (FFS)

The FFS is made up of a set of activities (or phases) that make the food produced by the fishing and aquaculture sector, as well as that processed by the fishing industry, available to consumers. It therefore includes the fisheries and aquaculture sector, the fish industry, and associated activities in industry, services, transport, storage and distribution (Figure 1).

FIGURE 1. PHASES OF THE FISHERIES FOOD SYSTEM



Note: the original name of Phase III (fish industry) has been changed to the processing industry in order to adapt this nomenclature to that used in the rest of the document.

Source: Ministry of Agriculture, Fisheries and Food (MAPA, by its initials in Spanish), Analysis and Prospective - series Fishing no. 6 (November 2022).

Throughout the chain, each activity, in its relationship and dependence on the production of food from fisheries and aquaculture, generates an economic value that can be quantified as a contribution of the fisheries food system to the economy.

The report will focus on phases II and III, i.e., fisheries and aquaculture production and fish processing industries, for two main reasons. On the one hand, because the activities associated with the fisheries and aquaculture sector and its processing industry are one of the factors in food security. On the other hand, because they play a key role in the

backbone of the chain, as they shape the demand for phase I and, to a certain extent, the demand for phase IV and the supply of commercial distribution, as well as generating, via exports and imports, especially in the fish industry, different foreign trade balances.

These activities (II and III) have also historically been a key sector for the Spanish economy, especially in certain coastal areas due to their concentration, where employment and economic activity are linked to their sustainability and prosperity. In this respect, it should be remembered that Spain has a great maritime-river heritage, with approximately 8,000 km of coastline and one million km² of marine waters, whose complexity and biodiversity are largely due to its location on the border between the Atlantic Ocean and the Mediterranean Sea²; this coastline is home to a population of 18.6 million inhabitants in the so-called coastal municipalities, of which around 870,000 people live in rural coastal municipalities, and the rest in urban areas.

In addition, Spain has 528,547 km² of continental hydrological surface area distributed along 82,577 km of river sections³, characterised by specific climatic and geological factors that determine the various Spanish river typologies.

However, at least the data for phases I (supplies and services), IV (transport and storage) and V (wholesale and retail distribution), given its importance in the fisheries food system in terms of GVA and employment, as well as in price formation mechanisms. These three phases together account for 73% of the GVA of the FFS, with a particularly significant weight of phase V. In terms of employment, employment in the distribution phase accounts for 37% of the total in the FFS, and 25% in the transport and storage phase.

Traditionally, fishery products, which came exclusively from fishing, were landed in ports and marketed through the fish markets. Today, fishery products from the Spanish fleet share the market with aquaculture products farmed in Spain and with the import of very significant quantities of fishery and aquaculture products from third countries to Spain. All these products are marketed both through fish markets and through other officially authorised shipping centres.

In Spain, marketed fish originates at different unloading points, such as seaports (currently the point of origin of many changes in the marketing chain), dry ports (one of the main entry points to the Spanish market for imported fish products, whether arriving by land or air transport, and which are shipped to distribution companies within the country or re-exported within and outside the European Union), and aquaculture farms (which may ship their products directly to the retailer or concentrate production through wholesalers at origin or purchasing centres). In addition, direct sales to links in the chain closer to the final consumer contribute to the diversification of distribution channels, although these initiatives are of little relevance in terms of marketing volume.⁴

2 Law 5/2023, 17th March, Sustainable Fisheries and Fisheries Research.

3 European Commission, Report from the Commission to the European Parliament and the Council on the implementation of the Water Framework Directive (2000/60/EC) and the Floods Directive (2007/60/EC). Second Cycle Hydrological Plans, First Cycle Flood Plans [SWD (2019) 42 final].

4 FAO, "El mercado de productos pesqueros en España" (*Globefish Research Programme*, volume 106, 2012).

CONCLUSIONS, CHALLENGES FOR THE FUTURE
AND PROPOSALS FOR ACTION

Structure and evolution of the sector. Territorial dimension

Over the last few years, the deterioration of Spain's fisheries food system has been noted. The fishing fleet, mostly small-scale, fell by 12.3% between 2013 and 2022, to 8,657 vessels, with catches and landings falling accordingly (by 21% in terms of live weight, and 18% in terms of value). Despite all this, Spain continues to be the leading power in terms of fishing volume and the third in terms of fishing vessels.

The number of aquaculture establishments fell by 1.5% to 5,182 between 2019 and 2021, although production has been on an upward trajectory since 2013. Similarly, the number of companies in the fishery and aquaculture products processing industry has decreased by 14% since 2012, although their production has increased significantly: 36% in quantity and 55% in value.

In any case, according to MAPA estimates, the food fishing system generated in 2020 (latest available data) a gross value added equivalent to only 0.75% of GDP, and although in the last decade it increased by almost 10%, discounting the GVA corresponding to imports of agri-food products, the growth was practically nil, giving an idea of the importance of foreign purchases in maintaining the sector's GVA.

CHALLENGE: IMPROVING THE ECONOMIC VIABILITY OF THE FISHERIES AND FOOD SYSTEM BY IMPROVING ITS COMPETITIVENESS

Proposals:

1. A decisive commitment to research, development and innovation, as well as digitisation is required throughout the entire fisheries food system, with adequate financial and technical support for the sector.
2. Promote collaboration between scientific research (research institutions and public research bodies) and the activities of the fisheries, aquaculture and processing industry.
3. Develop new fishery and aquaculture products through innovation in their processing and the development of new forms of presentation, which adapt to new demands for quality, food safety and convenience on the part of consumers and which, ultimately, make it possible to increase the added value of the products on offer, while contributing to the decarbonisation of the economy.

4. With regard to costs, reducing energy operating costs by accelerating the energy transition in the value chain is a priority. And in general terms, there is a need for rapid and effective action mechanisms to minimise the impact of external shocks on companies' operating costs.
5. Strengthen the access of companies in the sector to external financing, e.g., by securing guarantees for loans.
6. Facilitate the sector's access to resources from the European Maritime, Fisheries and Aquaculture Fund for the period 2021-2027.
7. Enable the fisheries and aquaculture processing industry to access support for industrial, digital and environmental transformation of production processes.
8. Make progress in the simplification and organisation of the regulations of the fisheries food system, given the numerous areas to be covered (health, food, environment, etc.) and the different competent administrations.
9. In particular, continue to make progress in simplifying, reducing and streamlining administrative burdens and simplifying administrative procedures in areas such as licensing, obtaining permits, or reporting obligations. With regard to the latter, attention should be drawn to the approval by the European Commission in October 2023 of the proposal for a Regulation (COM (2023) 643 final) on certain reporting obligations. This proposal is part of the Communication "Long-term Competitiveness of the European Union: Beyond 2030", in which the Commission undertook to make progress in streamlining and simplifying reporting obligations, with the ultimate aim of reducing these burdens by 25%. Likewise, technical, legal and economic-financial advisory services should also be offered to companies in the sector.

Consumption of fishery and aquaculture products

The successive crises and other factors related to inadequacies in communication aimed at consumers, the perception of health risks derived from the consumption of these products and the inflationary scenario, have led to an accumulated fall in the final consumption of fishery and aquaculture products of 33% between 2008 and 2022 in Spanish households (38% if only fish is taken into account). The fall also affects consumption of these products outside the home (bars, restaurants, cafeterias, etc.), which between 2018 and 2022 was almost 11%.

There is a perceived association between the fall in consumption of fishery and aquaculture products and the socio-economic changes faced in recent years (such as the loss of purchasing power, the abandonment of the Mediterranean diet or the change in lifestyles towards a model that devotes less time to buying and cooking fresh products), together with other factors such as the perception of the health risks derived from this consumption (such as those related to the presence of contaminants or the incidence of parasitosis).

CHALLENGE: PROMOTING INCREASED CONSUMPTION OF FISHERY AND AQUACULTURE**PRODUCTS****Proposals:**

1. Recover the Mediterranean diet, where fishery and aquaculture products occupy a key place as a source of healthy and sustainable food.
2. Improve social awareness of fishery and aquaculture products, through general communication and information, actions to raise awareness of the health benefits of sustainable consumption of these products and, in general, of the role played by this activity in food safety and nutrition. Consumers must be made aware that these are safe products, subject to exhaustive controls and monitoring by the European and Spanish health authorities.
3. A major effort is required in campaigns to promote the consumption of fishery and aquaculture products, through a public body that coordinates the sector's promotional activity at the institutional level. Likewise, in the development of promotional actions, collaboration agreements should be established with sectoral associations. These campaigns should pay special attention to the age groups with the lowest consumption of fishery and aquaculture products.
4. The incorporation of food and nutrition education as a compulsory subject in primary and secondary school curricula could be appropriate.
5. Ensure that legislative developments in the area of consumer information are properly discussed with the sectors concerned.
6. Establish mechanisms to regulate the use of commercial names for fish products in the so-called imitation vegan products, which do not contain marine protein, avoiding fraudulent or ambiguous use of commercial brands and clarifying the references and contents of these products.

External trade of fishery and aquaculture products

Spain is a key Member State in Community trade in fishery and aquaculture products, being the European Union's leading importer and the third largest exporter in terms of value. However, it maintains an important import dependence, with a coverage rate that in the last decade has been around 60%, below the average rate of Spanish trade (85%) and, especially, of some very competitive activities in the food sector.

This import dependence is shared by the rest of the EU countries and, in general, by the developed countries, and occurs mainly with non-EU countries, which have notably increased their participation in world trade in recent years, in a context of greater globalisation of trade and relocation of the production and processing of products to those countries, due to their comparative advantages. In addition, the restrictions on fishing options resulting from the extension of exclusive economic zones and measures to regulate fishing and aquaculture within the European Union have reduced the fishing capacity of Community fleets and aquaculture production, with production being insufficient to supply the domestic market.

On the other hand, certain non-EU countries base their commercial strategies on lower fixed costs and, therefore, cheaper products, associated with low socio-economic and environmental conditions compared to EU standards. Thus, the numerous regulations and policies that EU operators are obliged to comply with place them at a disadvantage compared to these countries, leading to unfair competition or a lack of a level playing field.

CHALLENGE: IMPROVING EXTERNAL TRADE AND FISHERY AND AQUACULTURE PRODUCTS

Proposals:

1. The Community authorities shall ensure the proper functioning of the control systems for imports of fish from outside the Community in all Member States. The European Union must continue to move towards a catch certification scheme that guarantees not only the legality of imported fishery products, but also their sustainability. The aim is to achieve a balanced competitive framework between fishery and aquaculture products imported from third countries and those from the Member States, which guarantees compliance with the requirements prevailing in the internal market with regard to quality standards, food safety and socio-labour and environmental standards. A step in this direction would be the adoption of the Proposal for a Regulation of the European Parliament and of the Council of the European Union banning products made with forced labour from the EU market.
The powers of the authorities to control and monitor imports of fishery and aquaculture products should be strengthened, with stricter deterrents to help achieve a level playing field for operators.
2. To enhance the internationalisation of the fisheries food system, promoting exports and investments of companies in third countries.

Employment and industrial relations. Keys to securing the future of the sector

LACK OF BALANCED PARTICIPATION OF WOMEN

The activities of the food fishing industry as a whole continue to show a high presence of men, only partly compensated by the frequency of women in the processing industry, where they are in a large majority, although with a lower presence in managerial, professional and technical positions.

The food fisheries sector therefore faces a double challenge. The first is to encourage women's labour participation in the extractive fishing sector. This can foster intergenerational changeover and contribute to filling the lack of new fishermen. On the other hand, in the processing industry sector, the challenge for public policies and social partners may also be to close the gender gap. However, in this case, one of the key issues is to improve women's working conditions.

CHALLENGE: PROMOTING THE BALANCED PARTICIPATION OF WOMEN IN ALL ACTIVITIES OF THE FISHERIES FOOD SYSTEM

Proposals:

1. Broaden and deepen the non-discrimination protocols and measures for reconciling work and family life that have been established in the collective agreements of the sector.
2. Promote the approval of equality plans in companies.
3. Offer mentoring programmes (as some companies already do on an ad hoc basis) to enable women candidates to gain access, through internal promotion, either horizontally or vertically, to positions in the sector traditionally occupied by men: management positions and those such as goods transport and warehouse operations.

AGEING OF THE WORKFORCE IN THE SECTOR

Based on data from the Special Regime for the Sea (fishing, aquaculture, auxiliary fishing industry and other activities carried out on board fishing vessels), it can be seen that the maritime-fishing sector has a high need for generational replacement. Only 27% of the workers are under 40 years of age and 42% of the total are over 50 years of age. This situation is aggravated by the fact that the sector is not being replenished at an adequate rate by new graduates. In a survey carried out by the General Secretariat for Fisheries, the majority of students in maritime and fisheries training programmes stated that they prefer to work in the merchant navy or recreational marine rather than in fishing. The reasons for this are their perception of the danger and hardship of the activity, the long periods of time away from home and the belief that it is not sufficiently well remunerated.

However, measures have already been taken to improve the coordination of training programmes and the productive fabric of the sector and to facilitate the transition of students to the labour market. The first professional experiences of dual vocational training in the maritime and fishing sector show very high rates of professional insertion; for example, in the case of the programmes provided by the Xunta de Galicia in the dual modality, this is 97%.

CHALLENGE: ENSURING THE GENERATIONAL HANDOVER

Proposals:

1. Improve and enhance educational and continuous training programmes in the maritime fisheries sector to address the lack of generational replacement.
2. Increase the offer of paid traineeships, especially in the framework of training programmes and practical experience required for professional qualifications.
3. Promote basic, intermediate and advanced vocational training qualifications specific to fisheries, aquaculture and the processing industry as a way of guaranteeing generational changeover in the sector. For example, the extractive industry does not have specific qualifications, but is covered by the intermediate level of vegetable,

meat and fish canning technician. Therefore, due to the multiplicity of companies that vertically integrate aquaculture and fish processing activities, the possibility of establishing a qualification that combines these contents could be analysed.

4. Increase the number of places offered and the number of educational centres offering these qualifications and, in particular, guarantee the existence of a homogeneous training offer throughout the national territory. Such training need not be limited to coastal provinces or provinces with a fishing tradition. For example, in the case of aquaculture, it is possible to offer training in landlocked provinces, benefiting from agreements with local companies. In order to facilitate the geographical mobility of students, initiatives such as the creation of residences for students coming from another province could be facilitated.
5. Increase the offer of dual-mode or online training, expanding the current offer, which is limited to the seafarer-fishermen's course. In the case of qualifications in the field of extractive fishing, the possibility could be explored of offering a first part of the training, of an eminently theoretical nature, entirely online, and a second practical phase in educational centres and companies located on the coast.
6. Advance in the integration of academic and professional qualifications, allowing certificates of professionalism to grant access to professional qualifications, while at the same time reducing the on-boarding time required to obtain the lesser qualifications. Likewise, it is advisable to promote the recognition of professional experience as a form of professional promotion, establishing an equivalence between academic training and years of work experience in each category.
7. Ensure a smooth transition from training to the world of work by expanding the offer of dual vocational training in the maritime-fisheries sector. To move in this direction, a joint exchange of internship offers for graduates in training programmes in the sector can be developed, promoting transparency and allowing graduates' first work experience to be best adapted to their preferences.
8. Attract talent by carrying out promotional campaigns among young people, for example, by promoting orientation talks in the last year of secondary school or the baccalaureate or participation in educational fairs. These can focus on the job opportunities offered by the maritime-fishing sector in order to awaken vocations and need not be limited to territories with no fishing tradition. Along the same lines, the offices of the State Public Employment Service (SEPE, by its initials in Spanish) could play a role in providing information on the offer of training programmes in the sector.

ABSENCE OF AN INTEGRATED INDUSTRIAL RELATIONS SYSTEM IN THE EXTRACTIVE FISHING SECTOR

Substantial progress has been made in labour regulation in the maritime-fishing sector, partly driven by Directive (EU) 2017/159, the result of European social dialogue. However,

there are significant differences between the sub-sectors analysed, so that the regulation of labour relations between them does not present a homogeneous picture. While in aquaculture there is a relatively stable conventional regulatory framework, in the processing industry a relevant part of employment is seasonal and extractive fishing is characterised by a reduced presence of collective agreements.

Notwithstanding the changes that have taken place, continuing to improve working conditions is one of the most effective ways to address the challenges facing the activity. This would ensure continuity in attracting talent while measures such as reducing seasonality could have positive effects on productivity.

CHALLENGE: BUILDING AN INTEGRATED SYSTEM OF INDUSTRIAL RELATIONS IN THE EXTRACTIVE FISHING

Proposals:

1. Without prejudice to the autonomy of the parties, reach a framework collective agreement covering the different fishing gears and applicable to all fishing grounds where the Spanish fleet operates.
2. Ensure that seafood products imported from non-EU countries comply with working conditions equivalent to those required in the EU, in order to avoid that higher costs resulting from higher standards lead to unfair competition and loss of competitiveness of the sector.
3. Achieve full implementation of the Fishing Vessel Journey Log in application of the legislation in force and specify the conditions for its application.
4. Improve workers' pay and, in the case of extractive fishing, make it more stable. In order to improve the remuneration of fisheries, ways could be explored to obtain complementary income, increasing the remuneration and thus addressing the perception that the remuneration is not sufficient. For example, this could be articulated through the integration of tourism activity in certain sectors of the fishing fleet.
5. Make a greater effort to publicise the progress made in working conditions and wages. Information on the improvements articulated could be provided through campaigns promoted by the public sector and involving the social partners. These would be aimed at the general public and especially at young people who are at the point of making their career choices. In order to reach this target audience more effectively, consideration could be given to prioritising their broadcasting through non-conventional communication channels, such as social networks or streaming service playback platforms and video streaming platforms on the internet.
6. Improve safety at work, reducing the number of accidents and occupational accidents. Significant progress has already been made in this direction. These include the National Plan to raise awareness of health and safety at work in the fishing sector, which aims to increase the awareness of workers in the fishing sector of

the importance of maritime safety. It is therefore necessary to continue to make progress in raising awareness among fishermen, ship captains and shipowners, for which the General Secretariat for Fisheries could offer continuous training courses whose content would include the current regulations on occupational risks in the sector, as well as a decalogue of good practices.

7. Modernise the fleet in order to improve its habitability and adapt it to favour the presence of women on board.
8. Advance in the renewal of the fleet as a means for its decarbonisation and to reduce accidents and occupational risks. Vessels are simultaneously the place where the fishermen's work and personal lives are carried out when they are on board. Therefore, a reconfiguration of spaces can have a positive impact on achieving gender parity in the sector. To facilitate their adaptation, a fund could be established to partially compensate for the costs incurred in fleet renewal. Similarly, in line with the EESC's proposal in its opinion 2023/C 349/08 on the decarbonisation of the fishing fleet, it might be appropriate to reconsider the use of vessel tonnage as a metric of fishing capacity, given the desirability of increasing living space and the larger size of less polluting engines.
9. Many of these measures on employment and labour relations should be considered within the framework of social dialogue as a way of ensuring both the most complete diagnosis and the greatest support from the different actors for the lines of action and measures proposed. In this sense, the ESC's contributions are a first approximation to the work to be carried out by all those involved.

Contribution of the fisheries food system to European strategies

Three major strategies are currently underway in the European Union to which the food fisheries system can, and indeed is already making a significant contribution: strategic food autonomy, the achievement of a sustainable food system and European climate change goals.

STRATEGIC FOOD AUTONOMY OF THE EUROPEAN UNION

The COVID-19 pandemic and, above all, Russia's invasion of Ukraine, have highlighted the vulnerability that the European Union's high level of insertion in global value chains and its strategic dependence on third countries represent for its productive activity, in a convulsive and uncertain global environment that is also marked by a process of changes in globalisation.

In this context, the interest in promoting strategic autonomy has regained strength, and in the case of the European Union it is moving towards a new paradigm, the so-called "open strategic autonomy" which, broadly speaking, aims to achieve strategic autonomy while keeping the economy open. One of the priority areas for the EU is food, where the fisheries and aquaculture sectors and the processing industry can play an important role,

given their contribution to food security, environmental sustainability and the socio-economic situation of the territorial areas in which they operate.

CHALLENGE: TO ENSURE AT ALL TIMES THAT THE POPULATION IS SUPPLIED BY THE FISHERIES FOOD SYSTEM

Proposals:

1. The European Union and its Member States must have mechanisms in place to facilitate rapid and decisive action in extreme situations, so that the supply of food to the entire population is guaranteed at reasonable prices.
2. Have an impact on the fight against unfair competition in the external trade of products of the fisheries food system.
3. Strengthen cooperation with third countries and international organisations with a view to improving compliance with international standards related to the fight against illegal, unreported and unregulated fishing.
4. Prioritise the further integration of fisheries and aquaculture products into food security related strategies and policies in the European Union. In particular, the Common Fisheries Policy should ensure that the fisheries and aquaculture sector is able to deliver the products that consumers demand, recognising its strategic role in food security.

EUROPEAN GOALS OF THE CLIMATE CHANGE AND THE SUSTAINABLE FOOD SYSTEM

The European Council has set the objective of reducing greenhouse gas (GHG) emissions by at least 55% by 2030 compared to 1990 levels and achieving climate neutrality by 2050, to which the food fisheries system is expected to continue to contribute.

On the other hand, the need to make the European Union's food system sustainable necessarily requires the contribution of fishing and aquaculture products. In addition to being a source of healthy food, they represent an opportunity to increase the sustainability of the system, since they are products that, caught, produced and processed in a sustainable way, generate a lower carbon and water footprint than products of animal origin on land.

CHALLENGE: REINFORCE THE SUSTAINABILITY OF FISHERY AND AQUACULTURE PRODUCTS IN ORDER TO ACHIEVE THE SDGS OF THE UNITED NATIONS AGENDA 2030 AND THE GOVERNANCE OF THE OCEANS AND PROMOTE THE SUSTAINABILITY OF THE FOOD SYSTEM

Proposals:

1. Continue supporting the sustainability of fishing and aquaculture to ensure the conservation of resources, through improved knowledge and greater integration of the sector in conservation and protection tasks, promoting green and blue investments.

2. Advance in improving fisheries management to recover fish populations above the levels of Maximum Sustainable Yield (MSY), which will allow increasing catches and restoring ecosystems.
3. In order to avoid overfishing, fisheries management must be improved based on scientific information, and marine reserves must be established, equipped with sufficient means, in order to guarantee the sustainability of the resource.
4. Intensify the fight against illegal, unreported and unregulated fishing. For Spain to be able to maintain the leadership position it holds worldwide in this area, it must have the necessary material means to ensure surveillance and control activities. In this sense, it is worth highlighting the inclusion in the PRTR, within the Plan to promote sustainability, research, innovation and digitalization of the fishing sector, of an investment aimed at the acquisition of four light patrol vessels and the modernization of three high-altitude patrol vessels destined to the surveillance of the activity of the fishing fleet.
5. Continue adapting the size of the fleet to fishing opportunities, and when scrapping programs with budgetary resources are necessary, these should involve professional retraining options for crew members.
6. Advance in the development of innovative and more selective fishing gear, to reduce unwanted catches, and apply the landing obligation to eliminate discards.
7. Promote greater use of new technologies for data collection and fishing optimization to minimize unwanted catches. In particular, the installation on vessels of devices for the electronic sending of catches and for their geolocation and electronic observation systems for remote monitoring of fisheries and the fight against discards should be encouraged.
8. Promote the commercial value of bycatch, either through its use as direct consumption, or through processing and transformation into food for human and/or animal consumption.
9. Support the green and digital transition in aquaculture farms, which strengthens the optimization of resource use, the valorization of production and contributes to decarbonization and climate neutrality. It is necessary to develop aquaculture farms with a lower environmental and climate footprint, promoting the use of sustainable sources of protein for feed, feed efficiency, energy efficiency and the use of renewable resources.
10. Promote diversification in aquaculture production methods, for example through open ocean aquaculture, recirculating aquaculture systems (RAS), polyculture in ponds or integrated multi-trophic aquaculture.
11. Promote the contribution of aquaculture to good environmental status, and promote the environmental services it can offer, through the recovery and restoration of degraded areas; the preservation of coastal wetlands; or the recovery, surveillance or monitoring of the areas of the Natura 2000 Network.

12. Support the processing industry in improving energy efficiency, reducing the use of natural resources (water, energy, fuels and materials), and reducing the generation of discharges, waste and emissions. Specifically, it is necessary to establish energy efficiency measures in production processes, and the use of renewable and alternative energies; introduce environmental criteria in the design of products and their packaging and presentation; reduce the generation of waste and food waste and apply measures for their valuation, or introduce new technologies and innovative products that contribute to the sustainability of the processes.
13. Provide greater support for the financing of investment projects aimed at reducing energy consumption, improving energy efficiency and advancing the transition towards energies with less impact on climate change.
14. Adapt ports and land infrastructure as service providers to facilitate the energy transition in the sector, through the adoption of electricity supply facilities, liquefied methane, etc.
15. Make fishing and aquaculture activities compatible with offshore wind energy, and other activities, giving priority to the former.
16. Highlight the role of artisanal and small-scale fishing as a fundamental sustainable activity of the local economy, for which greater support is required, especially with regard to the marketing of its products, through shorter distribution chains. short cuts, promotion of new distribution channels, and promoting mechanisms to improve product differentiation.
17. Promote awareness in the sector about the problem of pollution of seas and oceans, for example, by participating in collection actions, where the trawling fleet has a strategic value, and promoting the reuse of plastic nets and utensils.
18. Promote in extractive fishing the captures of species that occupy low levels of the trophic chain and, in the case of aquaculture, integrated multi-trophic production that incorporates species of low trophic level.
19. Promote sustainable and healthy consumption habits among the population, disseminating clear and accessible information to consumers and creating a sustainable labeling framework that covers the nutritional, climatic, environmental and social aspects of food products.
20. Promote the consumption of species with low trophic levels, such as bivalve mollusks, shellfish or seaweed, among others.
21. Impact the reduction of food loss and waste, and intensify the fight against food fraud throughout the entire supply chain.

CHALLENGE: DESCARBONISING THE FLEET

Proposals:

1. In the field of extractive fishing, progress must continue in the decarbonization of the fleet and aquaculture vessels, promoting the use of renewable fuels with

low carbon emissions. A short-term solution could be the introduction of hybrid engines, with existing renewable technologies in a complementary or auxiliary manner (solar, wind, electric), as well as the use of advanced alternative fuels (not produced from food and feed crops).

2. A renewal plan for the Union fleet must be addressed, which makes it possible to complete the process of sustainable fishing with modern vessels, which requires having adequate human resources and qualifications to design, build and manage these vessels. In this sense, talent recruitment plans could be developed in third countries, in collaboration with the fishing sector, to solve the problem of generational changeover.
3. Promote the construction of more efficient vessels from an energy point of view, with greater selectivity, optimization and precision of fishing. However, any change in energy source will require new vessels with greater onboard capacity (gross tonnage) to accommodate the new machinery, although the definition and limits of fishing capacity established in the Common Fisheries Policy make such progress difficult. In this sense, the European Commission should review the definition of fishing capacity in order to implement new technologies related to the energy transition.
4. The decarbonization of the fishing fleet requires institutional support and specific financing and credit measures from the European Union, but the current limitations of the European Maritime, Fisheries and Aquaculture Fund do not allow its use to carry out this transition. In this sense, the EESC has expressed the need to explore other sources of financing, such as the European Investment Bank, the use of tariff collections for border carbon adjustment, or the mobilization of resources related to the taxation of energy reallocating them to the fishing sector. In any case, it is necessary for the European Commission to create an emergency fund to accelerate decarbonization, while there should be greater complementarity between existing policies and cohesion and regional development funds to help channel funds and avoid competition. between regions.
5. To evaluate progress in the fleet's CO₂ reductions, a reference base year for emissions reduction should be defined that does not penalize the fishing sector, recognizes the efforts made since 1990 and continues to drive it towards neutrality.
6. The decarbonization of the fishing fleet and aquaculture requires the application of a holistic strategy, which tries to find synergies between the different links in the chain.

CHALLENGE: ACHIEVING A JUST ENERGY TRANSITION

Proposals:

1. Ensure that the transition towards sustainability is accompanied by compensatory measures for the sectors involved, with technical and financial assistance from

community instruments such as the European Maritime and Fisheries Fund, as well as awareness-raising campaigns on the advantages and opportunities what it can mean to them.

2. Promote the involvement in this process of all levels of government, private sector agents in the food value chain, social partners, academia, non-governmental organizations and citizens.

CHALLENGE: IN THE AREA OF GOVERNANCE OF THE FISHERIES FOOD SYSTEM, MANAGEMENT AND ADMINISTRATIVE COORDINATION MUST BE OPTIMISED

Proposals:

1. Group the management and coordination of everything related to fishing, aquaculture and maritime affairs in a new Secretary of State.
2. Enforce the relevance of Spain as the leading fishing power of the European Union, so that it has greater weight in the European institutions, especially in the DG MARE of the European Commission.
3. Promote Participatory Local Development (LPD) as a tool to energize the territory, generating employment and quality business fabric in the affected populations. Promote the Spanish Network of Fishing Groups in its work to promote communication, the exchange and dissemination of experiences and activities that contribute to the DLP, and the strengthening of local action groups in the fishing and aquaculture sector.

Final considerations

The analysis carried out by this report identifies certain challenges that affect the structure and evolution of the sector, the consumption of its products, employment and labor relations, and in terms of its contribution to European strategies, providing proposals to achieve the objectives pursued. And it reminds in all cases the importance of reinforcing the role of social dialogue in this process.

The ESC considers that the fishing food system has strategic importance in supplying healthy food to the population and for balancing the food balance. In addition, it plays a fundamental role in the socio-economic well-being of coastal communities, local development, employment, maintenance and creation of upstream and downstream economic activities in the supply chain, and the conservation of local cultural traditions.

Spain, with a powerful fishing food system, framed in the European Green Deal, includes in Law 5/2023, of March 17, on Sustainable Fishing and Fisheries Research, the need to guarantee a balance between the conservation of the marine environment and the development of a profitable activity, attractive for business development and generational change, and the consolidation of a modern and competitive sector.

In this regard, the interest of fishing, aquaculture and processing industry activities comes from both their capacity to generate added value (directly or indirectly, through their push and pull effects on other economic activities), and their role in establishing the population, where they can be decisive in rural or intermediate coastal communities that, according to official population figures, group around 900,000 inhabitants, and in those rural areas where continental aquaculture and some processing industries. They have great roots and development potential.

The fisheries food system increasingly demands more scientific knowledge and advanced technologies, as well as sophisticated services and new industrial productions, for example, those derived from the needs to decarbonize the fleet. On the other hand, the development of aquaculture stimulates biotechnological research and the processing industry, subject to the challenge of new consumer demands, is in continuous search for new preparations, new processes and new products. This generates greater driving effects on the entire economy, including activities that are in principle very far removed from those traditionally associated with fishing. The connections of this entire system with what has come to be called “blue economy” in fact focus on large ports, and more on fishing ports than on merchant ports, the emergence of research and technology clusters that are opening new futures for the sector.

The Common Fisheries Policy has responded to the need to reverse the loss of marine biodiversity with evident environmental, social and economic impact on the Union’s fishing sector, the coastal and island territories, and the outermost regions, promoting the restoration, preservation, the conservation and sustainable use of marine biodiversity, promoting the collection of data for the monitoring and scientific evaluation of sea and

ocean populations, including the evaluation of safe biological limits, for their sustainable management.

However, to achieve the social sustainability of the sector, policies should integrate and improve working conditions, health and safety, training, social inclusion and an equitable standard of living. And remember that in many communities and fishing regions the social importance of the fishing and aquaculture sectors is greater than their direct economic contribution. In fact, the opening of the fishing food system to society is necessary for generational changeover and the balanced participation of women.