PRELIMINARY ANALYSIS

| April **2020**

The Spanish Mediterranean fishing sector and its market reaction to the ongoing coronavirus crisis

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SUMMARY

The Spanish fishing fleet has been severely impacted by the coronavirus crisis, with an important decrease in the fishing activity all around the Spanish Mediterranean coast.

There are two key elements to understand this evolution.

On one hand there are technical difficulties to ensure safe health conditions in fishing vessels with an average length of less than 12 meters.

But the Mediterranean fishing sector market structure it is also relevant. Almost 100% of the Spanish Mediterranean fish captures are sold on fresh fish markets. Moreover, one of its more important channels is the HORECA channel (hotels, restaurants and catering). All around Spain 23% of the fish is sold through this channel, but in the Mediterranean area fresh fish sales values are even higher. For some ports and species in touristic areas' values can be up to 70%. This channel has been closed since the 15th of March. Home consumption of fresh fish has remained similar to the same period of last year, so no compensation has been produced in the HORECA channel loss.

As a consequence, in the first week of the crisis offer clearly surpassed demand. In some extreme cases in the first days even some sales where lost because the distribution channel was unable to absorb the fish extraction. Fishermen -also under difficulties to ensure healthy working conditions- quickly decreased their activity. As a consequence, Spanish Mediterranean fishing captures decreased at a rate higher than the overall fish fresh market decrease, i.e. in Valencian and in most of the Balearic Islands lonjas (first sales points) volume sales decreased by almost 50%. In the second week of the crisis total traded volumes in Mercabarna – the main fish wholesale market coming from Catalonian sources had decreased 66%, and sales in euros decreased up to 70%. In the following weeks a partial recovery has been achieved but still with lower fish traded volumes (-36% in reference to the week before the crisis started).

Fish fleet activity has also evolved since the start of the crisis. While in most ports the reduction started in the first week after the decree of the alarm was set it was in the second week when most of the cease of activity in fishing ports in the Mediterranean took place. The impact was uneven; between 30 and 80% of the vessels depending on the region stopped their activity in the worst moments.

THE SPANISH MEDITERRANEAN FISHING FLEET HAS BEEN SEVERELY AFFECTED BY CORONAVIRUS CRISIS

HORECA CHANNEL (HOTELS, RESTAURANTS AND CATERING) SHUTDOWN IS A KEY ELEMENT TO UNDERSTAND THE ACTIVITY DECREASE OF THE SPANISH MEDITERRANEAN FISHING FLEET, AND ITS FUTURE EVOLUTION

THE IMPACT HAS BEEN UNEVEN; BETWEEN 30 AND 80% OF THE VESSELS, DEPENDING ON THE REGION, HAVE STOPPED THEIR ACTIVITY IN THE WORST MOMENTS. ON THE LAST WEEKS SOME RECOVERY HAS TAKEN PLACE

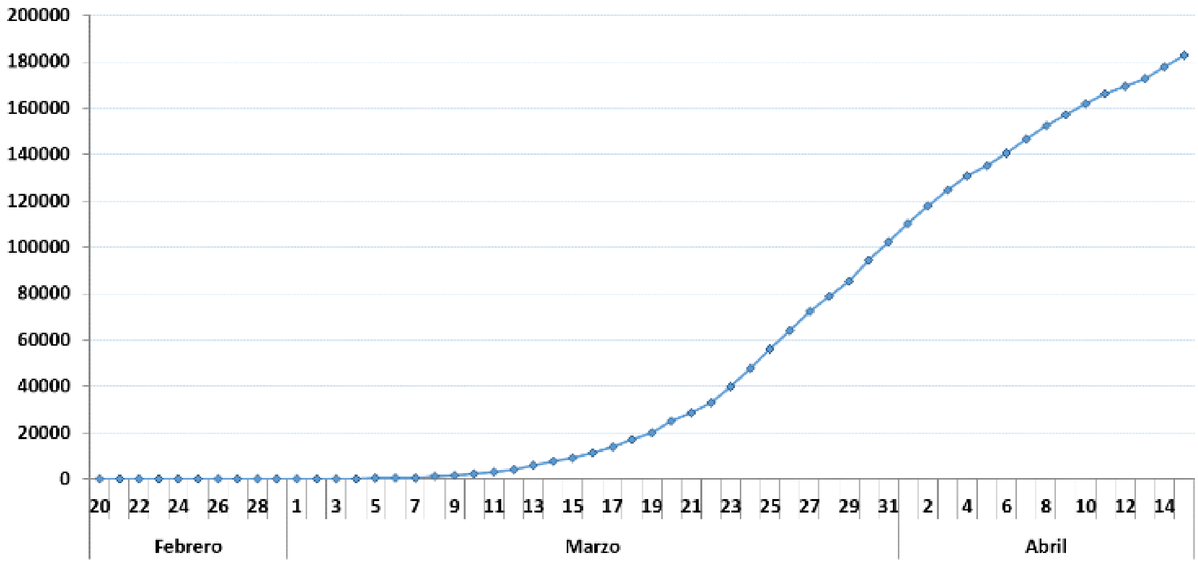
With the recovery of prices that has took place last two weeks, a clear increase in fishing activity has taken place in the last two weeks but volumes continue to be smaller than before the crisis, figures of around a 50% decrease in activity are still usual in many cofrarias.

It is likely that the full recovery of fishing fleet activity will not take place even if the health technical problems are solved, until the HORECA channel is reopened. Moreover, what the future demands of the HORECA channel in the Mediterranean will be is uncertain because it is also linked with tourism and there are severe doubts about its near reactivation.

1. CONTEXT

Coronavirus crisis started in Spain in mid-March.

Figure 1. Evolution of coronavirus cases in Spain



Source: Gobierno de España. Ministerio de Salud.

The Spanish government declared a state of alarm on March 13th and closed the schools.

Since the 15th of March citizens movement has been restricted. People should stay at home unless they have to buy food or medicine or go to work or hospital.

All non-essential shops remain closed since then, along with bars, restaurants, cafes and cinemas. Tourism, a very important economic sector in terms of fresh Mediterranean fish consumption, has collapsed. The Government set up special temporal labour force adjustment plans -ERTE- due to the coronavirus crisis. Fishermen, were also allowed to use this economic adjustment tool.

In the period of 30th of March – 12th of April all non-essential economic activity was closed. Fisheries were considered as an essential activity so theoretically they were not affected.

Nevertheless, as we will see in the followings sectors the combination of low prices and technical difficulties to ensure the new health standards have produced a major break down in the Mediterranean fisheries sector.

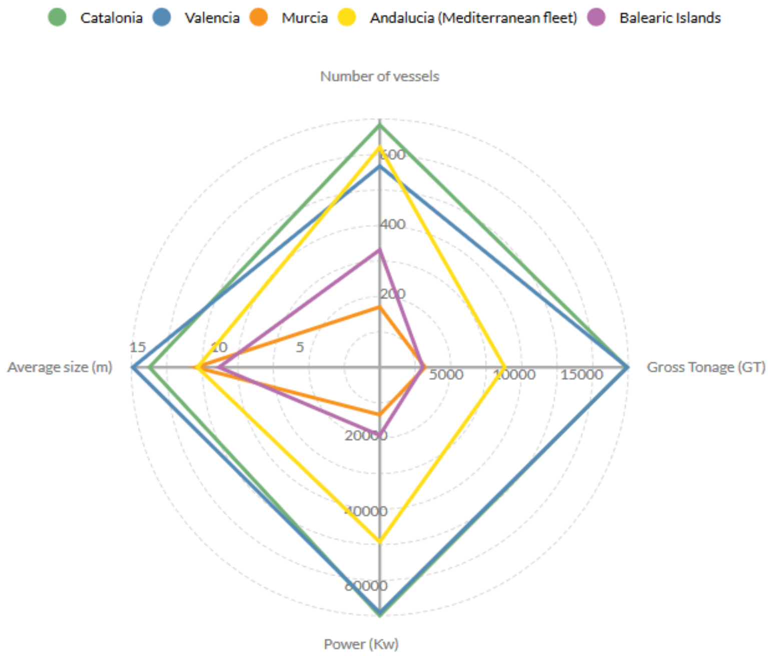
2. MEDITERRANEAN SPANISH FLEET MAIN CHARACTERISTICS

The Spanish Mediterranean fishing fleet is distributed all along the coast in five regions: Andalucia, Murcia, Valencia, Catalonia and Balearic Islands.

Figure 2. Spanish Regions

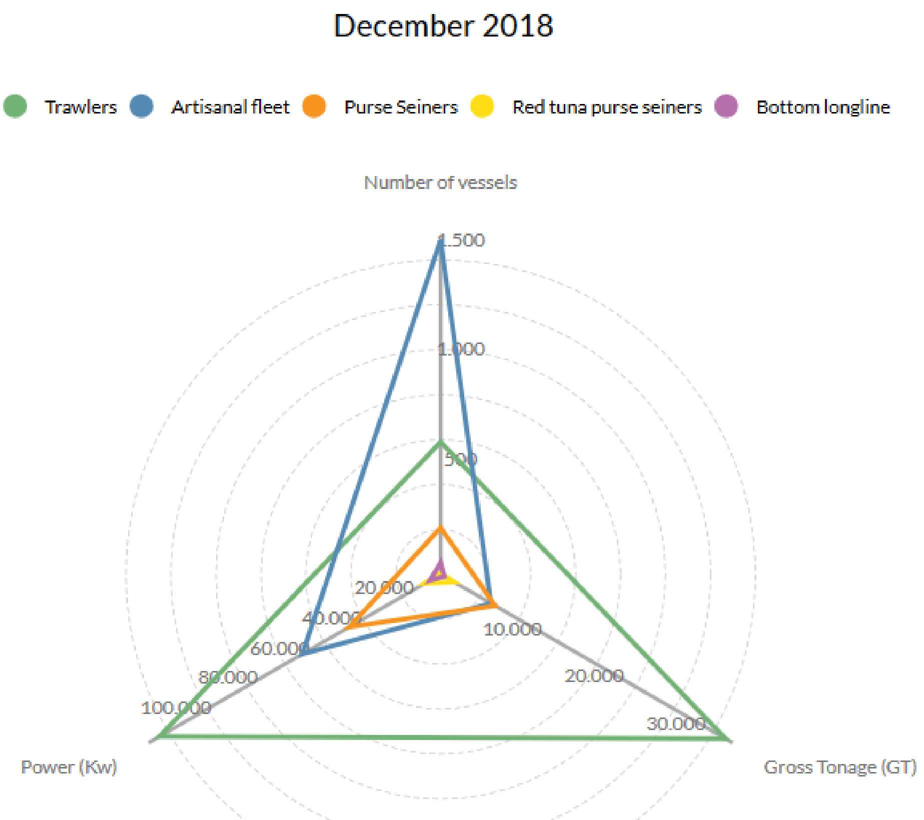
The Mediterranean Spanish fishing fleet main characteristics can be found in Figure 3 and Figure 4.

Figure 3. Spanish Mediterranean fleet distribution



Source: Data have been obtained from Estadísticas Pesqueras noviembre 2019. Ministerio de Agricultura, pesca y alimentación. Andalucian Mediterranean fleet information comes from: La flota pesquera Andaluza: situación a 31 diciembre de 2018. Junta de Andalucía.

Figure 4. Spanish Mediterranean fleet segments



Source: Data have been obtained from Documentación complementaria informe anual de la actividad de la flota pesquera año 2019. Ministerio de Agricultura, pesca y alimentación..

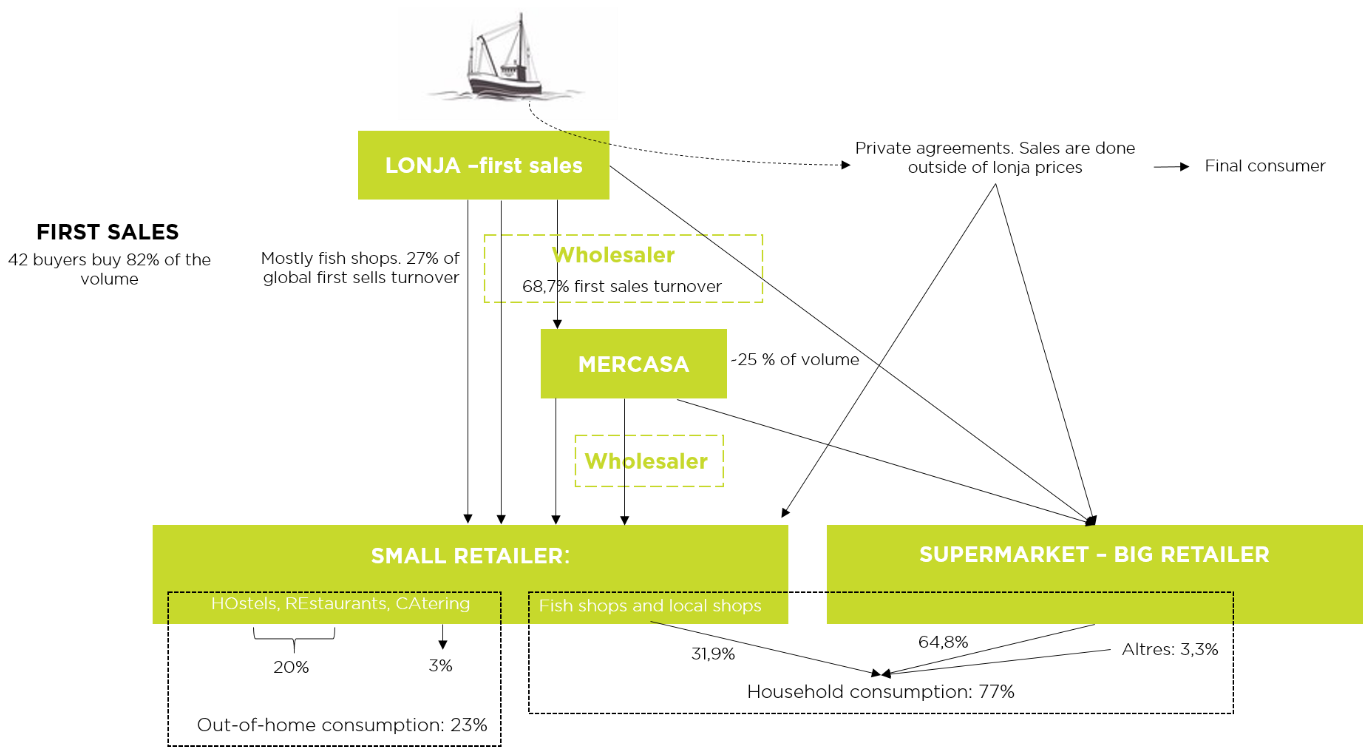
3. MARKET EVOLUTION

The captures of the Spanish Mediterranean fishing fleet are almost completely sold in the fresh fish market.

It is a very complex market (figure 2) with different degrees of transparency and public information.

The availability and quality of the market information depends both on the commercialization channel and the region where captures and sales are done. There are five different regions involved: Catalonia, Valencia, Murcia, Balearic Islands and Andalucía each one with its own characteristics in terms of public reporting of information.

Figure 5. Main commercialization channels of fresh fish in the Mediterranean Sea



Note: all figures are for Catalonia markets from official sources. The distribution between home consumption and extra-home consumption are data for Spain produced by the European Commission.

The HORECA channel is a key one in the distribution of fresh fish in the Mediterranean. According to EUMOFA (European Observatory of the Market of Aquaculture and Fishery Products) figures 23% of fresh fish consumed in Spain is sold through this channel[1]. In the case of the Mediterranean captures this value is even higher, but the

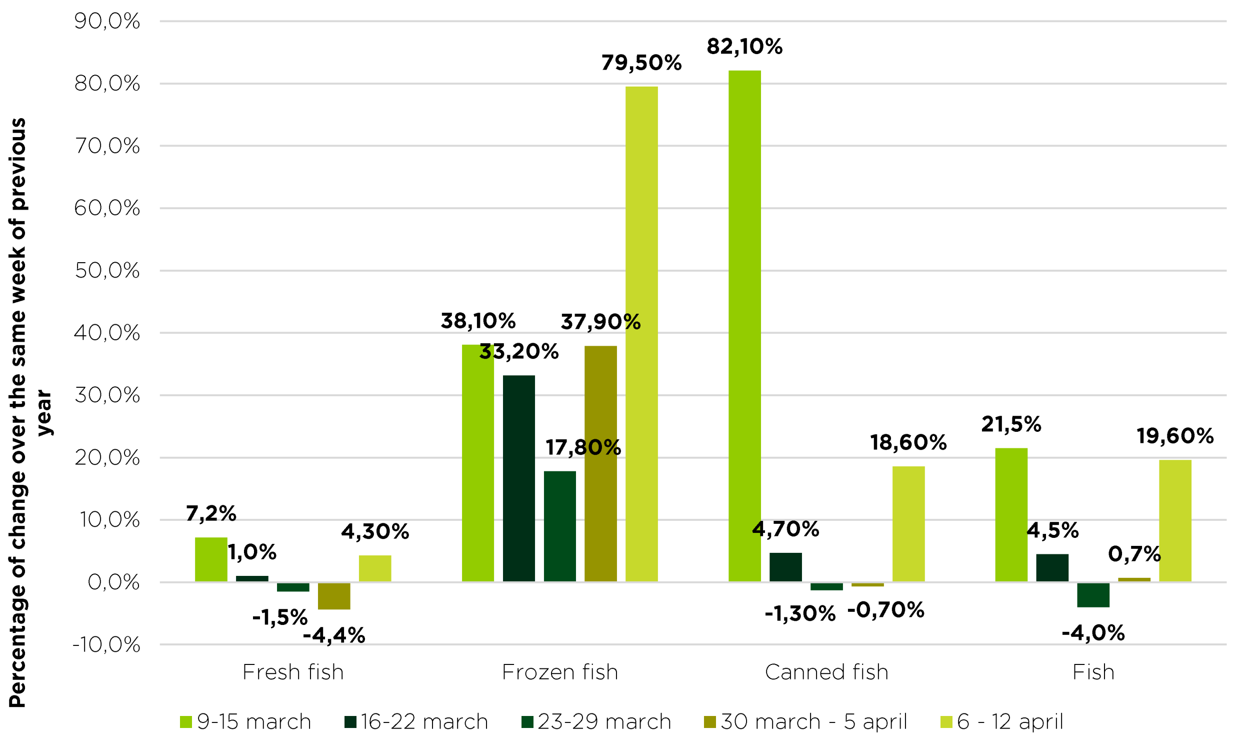
[1] 20% hotels and restaraurants, 3% institutional caterings (schools, hospitals, etc). Source: The EU fish market 2019 edition. European Commission.

figure depends on the area and the period of year. In some Mediterranean touristic areas and for some species this channel can sell up to 70% of the fishing captures.

The HORECA channel has been almost completely closed. The state of alarm has forced the closing of all hotels and restaurants since the 15th of March, only some minor catering services remain active. The shutdown of this channel is a key element to understand the fishing fleet decrease.

Fish home consumption has remained quite constant, with the exception of the week before the state of alarm started, when a very important stockpiling took place (increase of 21% of consumption over the same week of last year) mainly focused on canned (82% increase) and frozen fish (38%). In the following weeks the most relevant change in comparison with previous year data has been the maintained increase in frozen fish consumption (with an average increase of 30% on the same weeks as the previous years) while fresh fish consumption has had minor oscillations. This pattern is caused by a change in buyers' behaviour, where an increase in supermarkets (one shop – all products) and a decrease of specialized retailers has taken place. As a consequence, in the case of fresh fish there has not been any compensation for the losses from the HORECA channel by the home consumption channel.

Figure 6. Fish home consumption evolution in Spain

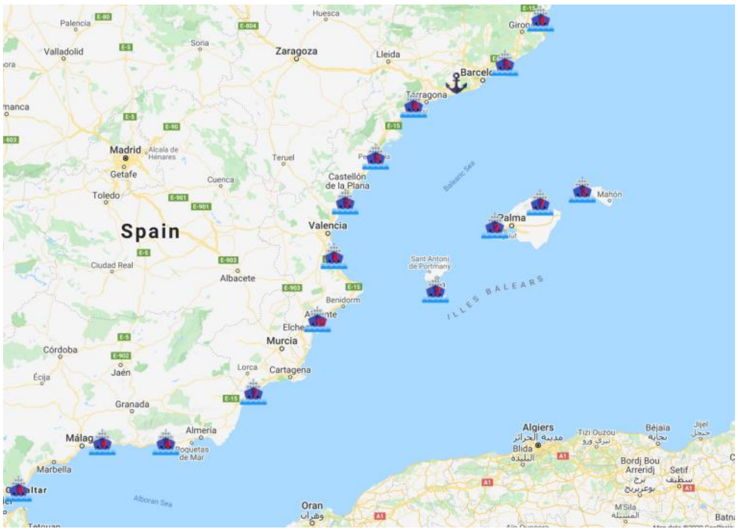


Source: Análisis de consumo en el hogar. Ministerio de Agricultura, Pesca y Alimentación
Note: 6-12 April 2020 was Holly week, where traditionally some more consumption of fresh fish take place. This fact can distort statistics on this week.

3.1. First sales

There are 79 first sales points in the Spanish Mediterranean (Lonjas).

Figure 7. First sales points distribution – lonjas - in Spain



Source: European Market Observatory for Fisheries and Aquaculture Products

The information on the captures and sales at these points usually is available for public scrutiny only with very important delays, even if the information is reported from the Lonjas to the regional governments electronically on a daily basis. Researchers can obtain, on demand, daily information from the Spanish administration but the time lag between demand and answer by the public administration made this source of information of limited use for a quick respond analysis as this one. We have tried to get the information from the Spanish, Catalan and Valencian administration but we have only received information from Catalonia and the Valencian Autonomous Community.

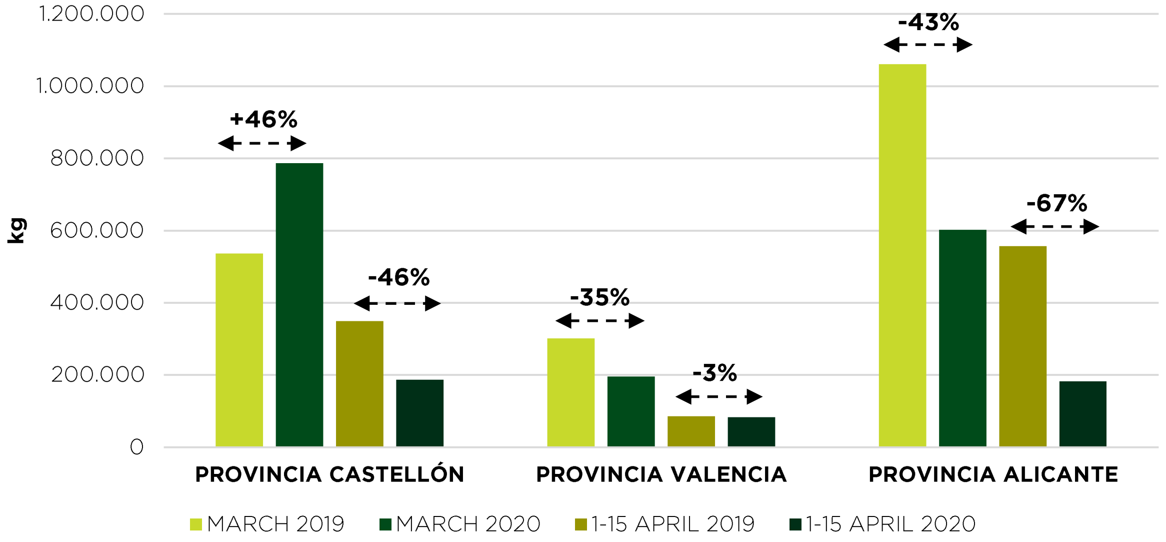
The aggregated monthly evolution (updated at 15th of April) of total captures and generated income at first sales points in the three subregions of Valencian community can be observed in Figure 8.

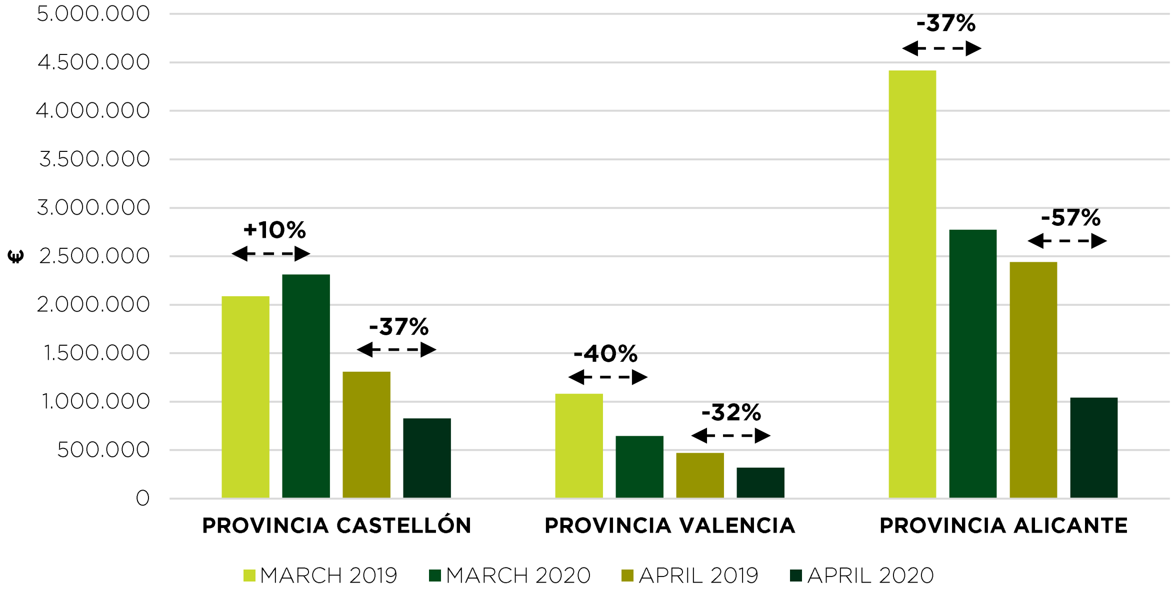
In comparison with the same last year period **at the regional level fishing turnover in the Valencian Community at first sales points decreased by 24% in March and 48% the first 15th days of April. Since the crisis started in mid-March, the information suggests around a 50% decrease on turnover up to the 15th of March**.

In the same period the **captures volume decreased by 17% in March and 54% in the first 15 days of April**.

In Figure 8 we can observe that the Alicante subregion is the more affected, both in March and April, and in quantity and turnover, while Castellon the impact is concentrated in April. Castellon volumes and turnovers are closely related to the important role of pelagic captures.

Figure 8. Monthly Valencian captures volume and sales income in first points sales by subregion





Source: Direcció general de Pesca. Generalitat Valenciana

A list of the change produced in all the first sales points (cofrarias) of Valencia can be found in Table 1.

Table 1. Volume and value change in Valencian cofrarias

	Volume		Value	
	MARCH	**1-15 APRIL**	**MARCH**	**1-15 APRIL**
LP VINARÒS	421%	59%	146%	32%
LP BENICARLÓ	-2%	-8%	-8%	-21%
LP PEÑÍSCOLA	-32%	-55%	-39%	-55%

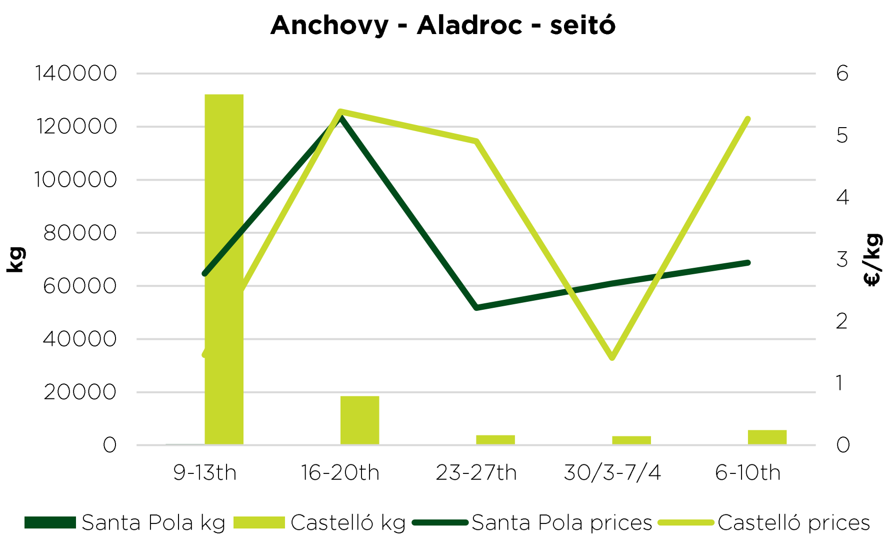
LP CASTELLÓN	31%	-81%	15%	-68%
LP BURRIANA	11%	-28%	-14%	-12%
LP SAGUNTO	6%	32%	-33%	-38%
LP VALÈNCIA	-28%	-26%	-41%	-37%
LP CULLERA	41%	-13%	-23%	-32%
LP GANDIA	-60%	15%	-56%	-28%
LP DÉNIA	-47%	-100%	-56%	-100%
LP JÁVEA	-89%	-87%	-79%	-89%
LP MORAIRA	1759%	706%	128%	155%
LP CALP	-24%	19%	-33%	27%
LP ALTEA	-79%	-96%	-62%	-90%
LP VILLAJOYOSA	-24%	-100%	-36%	-100%
LP EL CAMPELLO	-60%	-100%	-52%	-100%
LP ALICANTE	-80%	-100%	-96%	-100%
LP SANTA POLA	-2%	-37%	-14%	-35%
LP GUARDAMAR	-71%	-100%	-65%	-100%
LP TORREVIEJA	-1%	-66%	-18%	-22%

Source: Direcció general de Pesca. Generalitat Valenciana
Note: Percentage of change in relation to the week 2-9th of March.

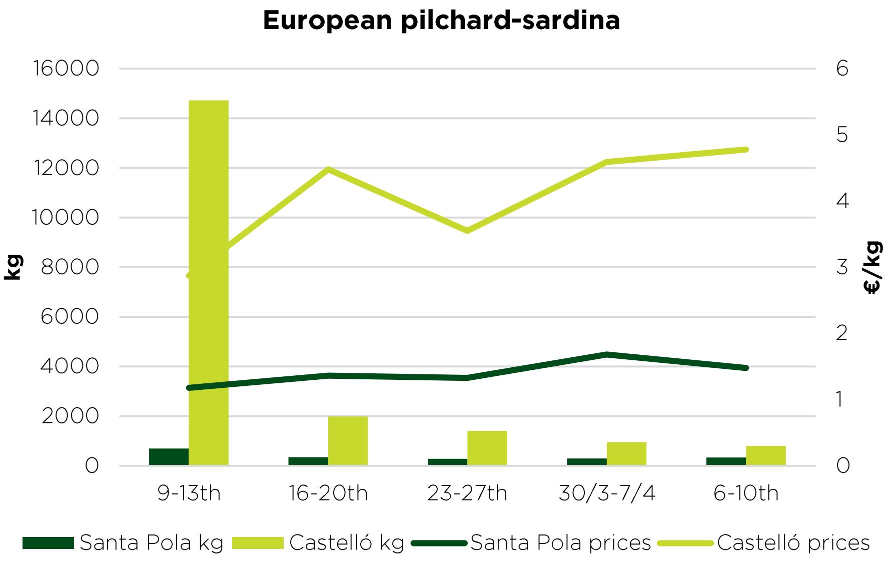
The Autonomous Community of Valencia also publishes reports of prices for 11 fish products in three mains first sales points of Valencia Community (Santa Pola, Cullera & Castelló)[2], that are at the same time the three most important fishing harbours.

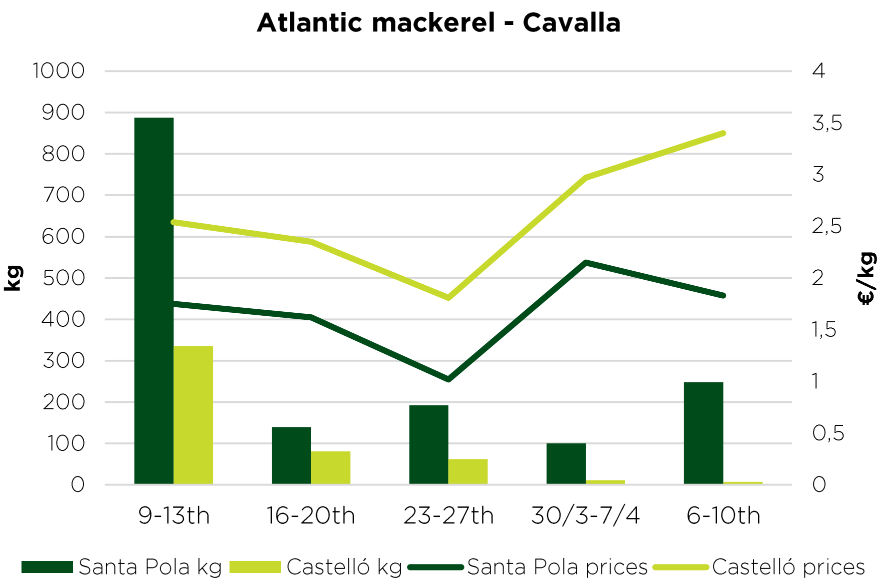
The evolution of nine of these products can be observed in Figure 9.

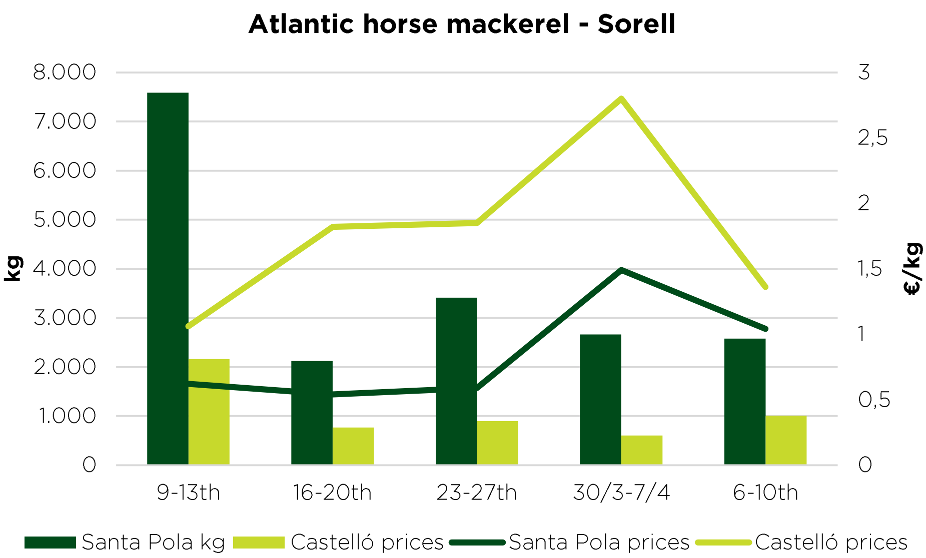
Figure 9. Key species evolution in selected Valencian cofrarias

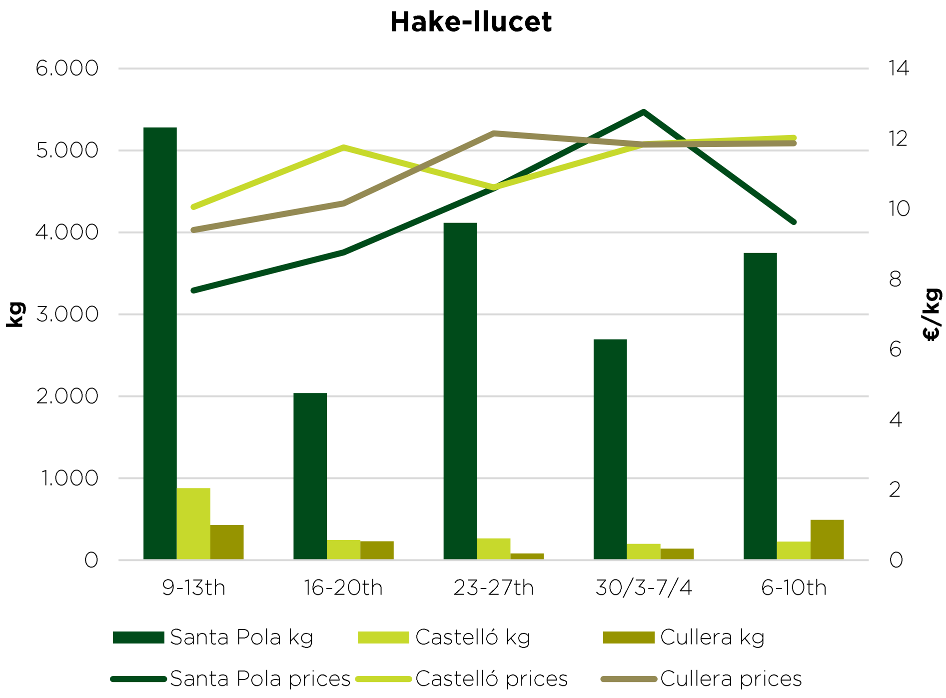


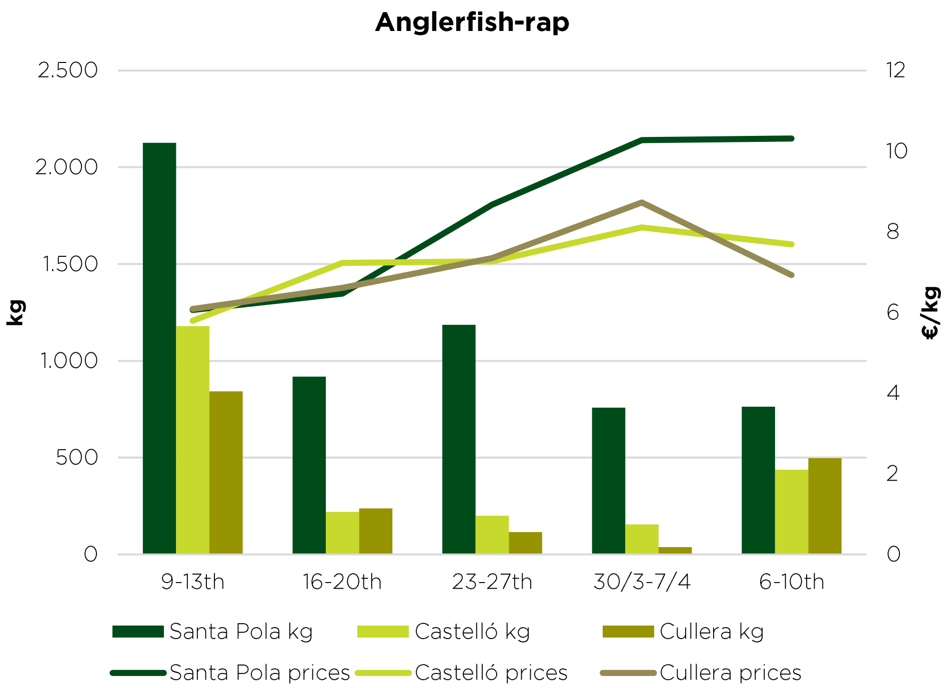
[2] http://www.agroambient.gva.es/va/precios-pesca

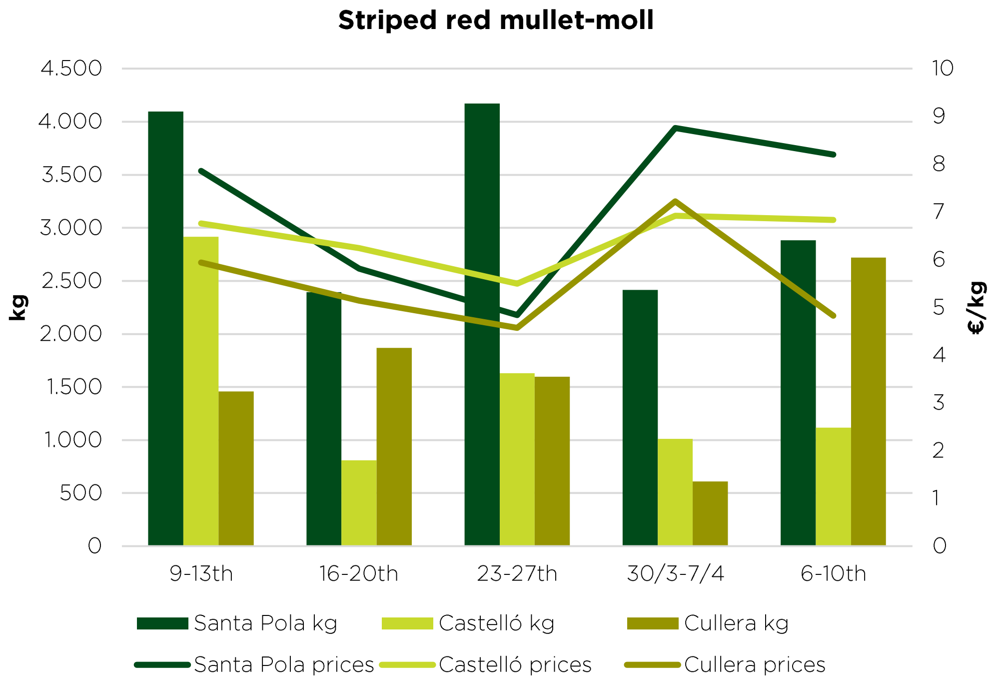

European pilchard-sardina
16000
14000
12000
10000
8000
6000
4000
2000
0
kg
6
5
4
3
2
1
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Santa Pola prices
Castelló prices

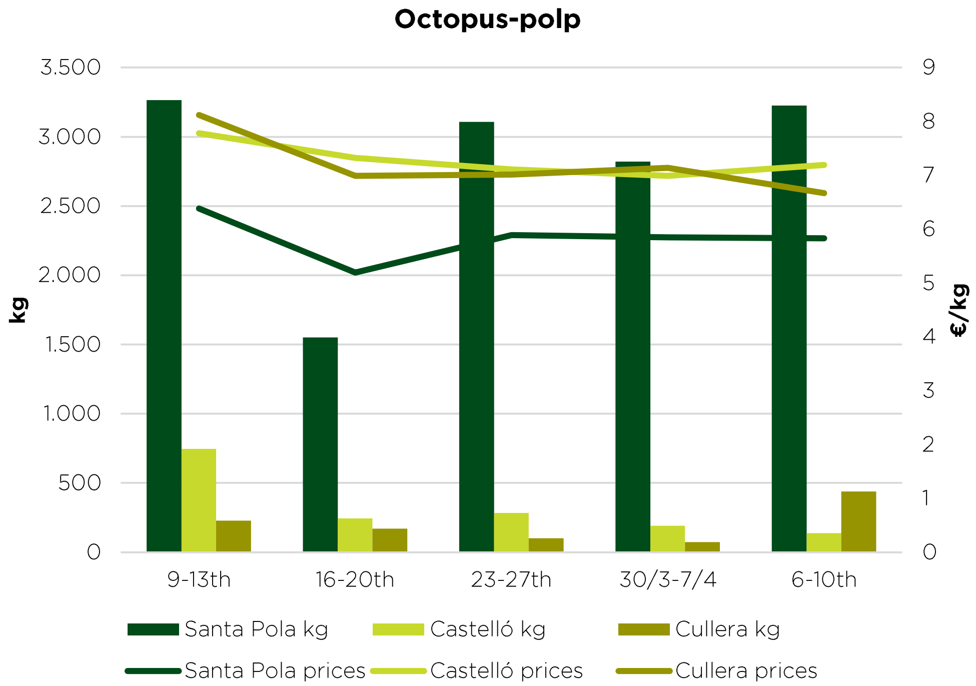

Atlantic mackerel - Cavalla
1000
900
800
700
600
500
400
300
200
100
0
kg
4
3,5
3
2,5
2
1,5
1
0,5
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Santa Pola prices
Castelló prices

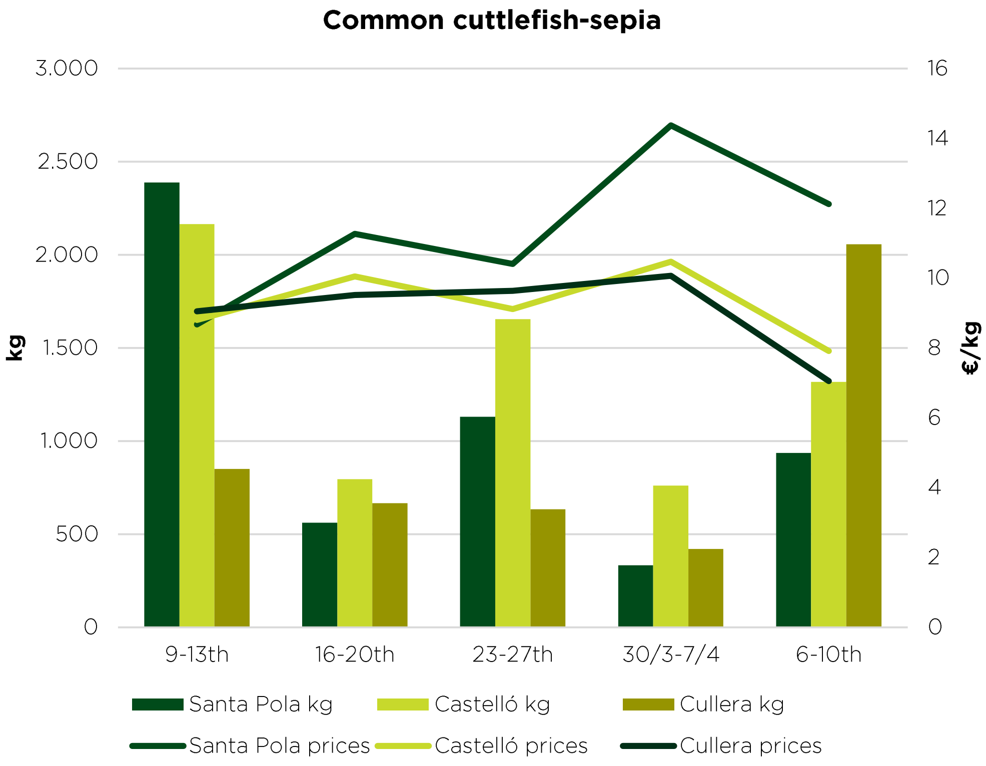

Atlantic horse mackerel - Sorell
8.000
7.000
6.000
5.000
4.000
3.000
2.000
1.000
0
kg
3
2,5
2
1,5
1
0,5
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló prices
Santa Pola prices
Castelló prices


Hake-llucet
6.000
5.000
4.000
3.000
2.000
1.000
0
kg
14
12
10
8
6
4
2
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Cullera kg
Santa Pola prices
Castelló prices
Cullera prices


Anglerfish-rap
2.500
2.000
1.500
1.000
500
0
kg
12
10
8
6
4
2
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Cullera kg
Santa Pola prices
Castelló prices
Cullera prices


Striped red mullet-moll
4.500
4.000
3.500
3.000
2.500
2.000
1.500
1.000
500
0
kg
10
9
8
7
6
5
4
3
2
1
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Cullera kg
Santa Pola prices
Castelló prices
Cullera prices

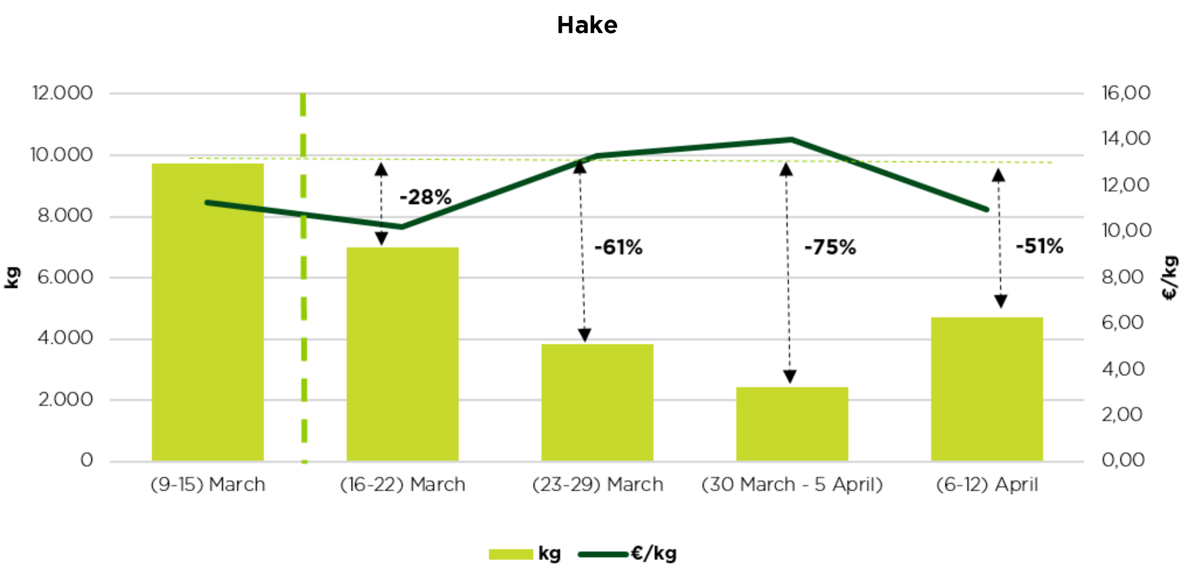

Octopus-polp
3.500
3.000
2.500
2.000
1.500
1.000
500
0
kg
9
8
7
6
5
4
3
2
1
0
€/kg
9-13th
16-20th
23-27th
30/3-7/4
6-10th
Santa Pola kg
Castelló kg
Cullera kg
Santa Pola prices
Castelló prices
Cullera prices

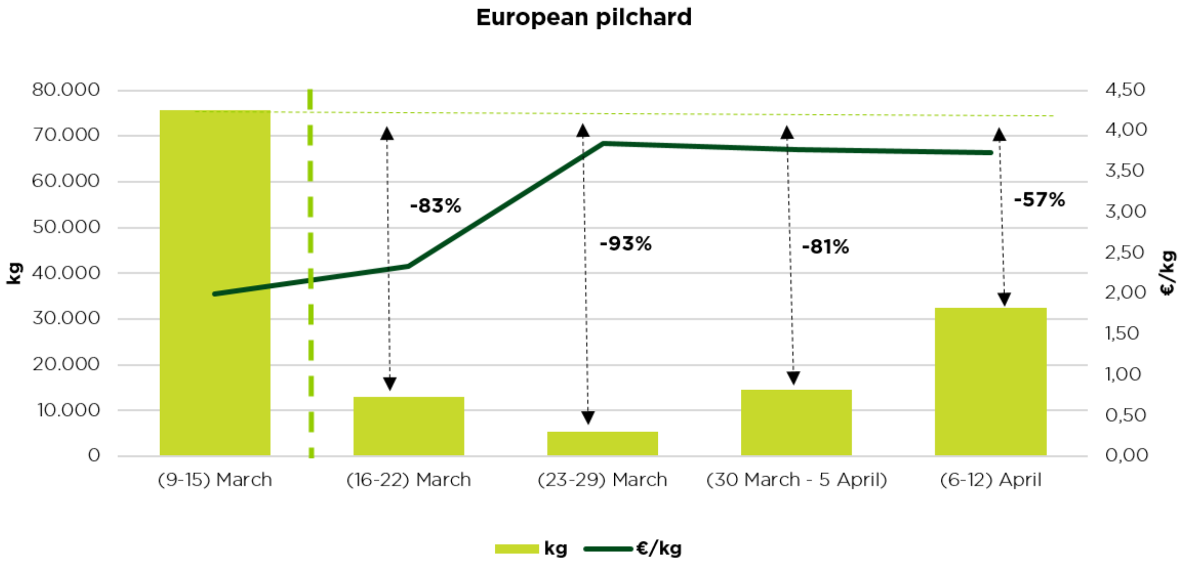


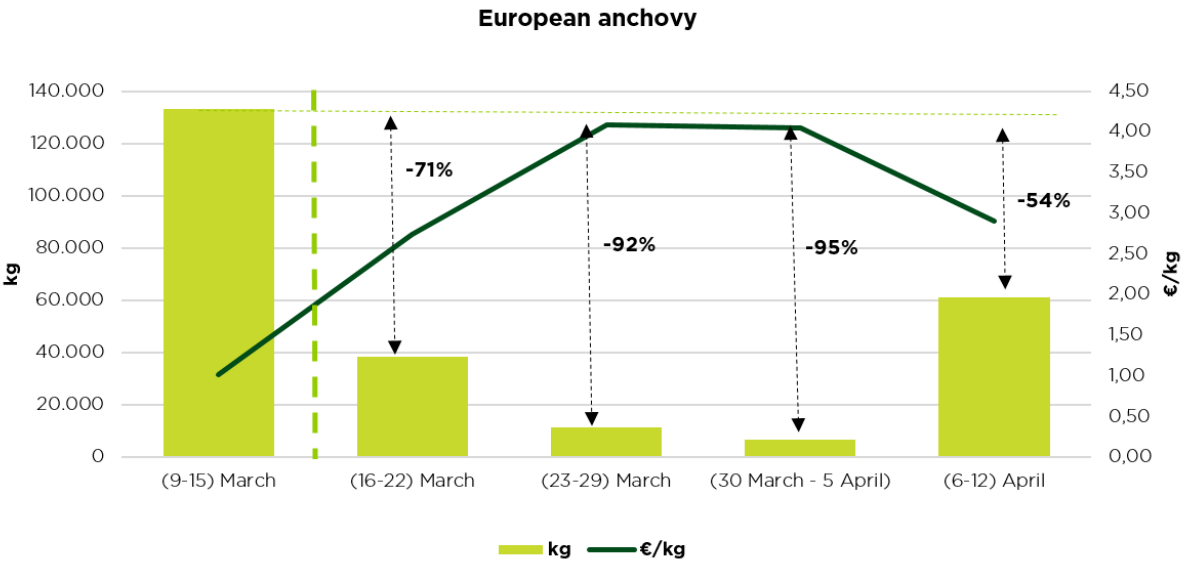
Source: Generalitat Valenciana. Agricultural prices.

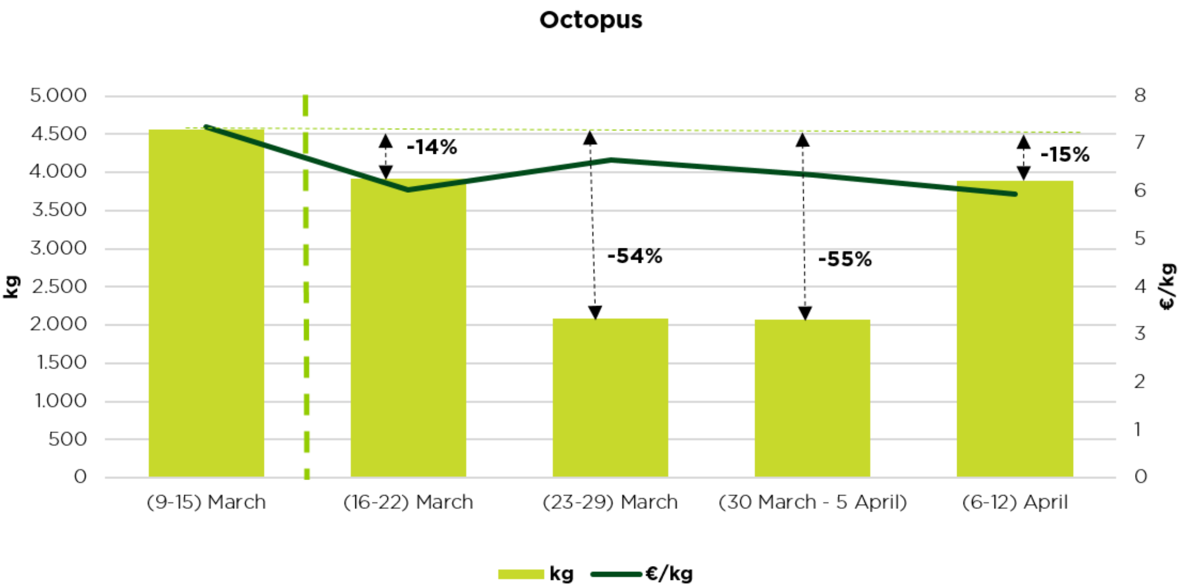
From the Catalan administration we have obtained the volume and price evolution in first sales points of the main commercial species in Catalonia.

Figure 10. Key species evolution in selected Catalan cofrarias

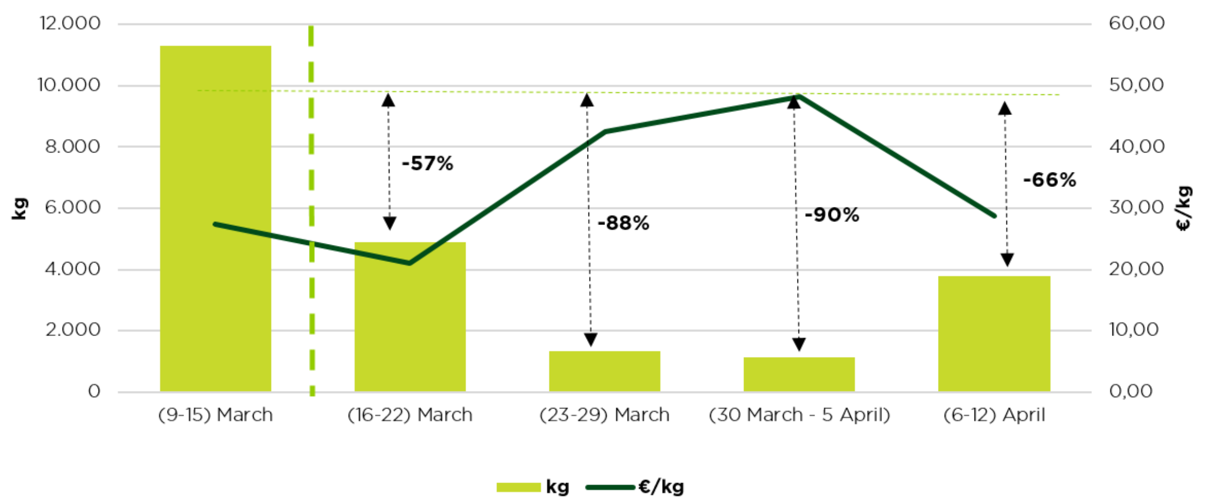



European pilchard
80.000
70.000
60.000
50.000
40.000
30.000
20.000
10.000
0
kg
4,50
4,00
3,50
3,00
2,50
2,00
1,50
1,00
0,50
0,00
€/kg
-83%
-93%
-81%
-57%
(9-15) March
(16-22) March
(23-29) March
(30 March - 5 April)
(6-12) April
kg
€/kg

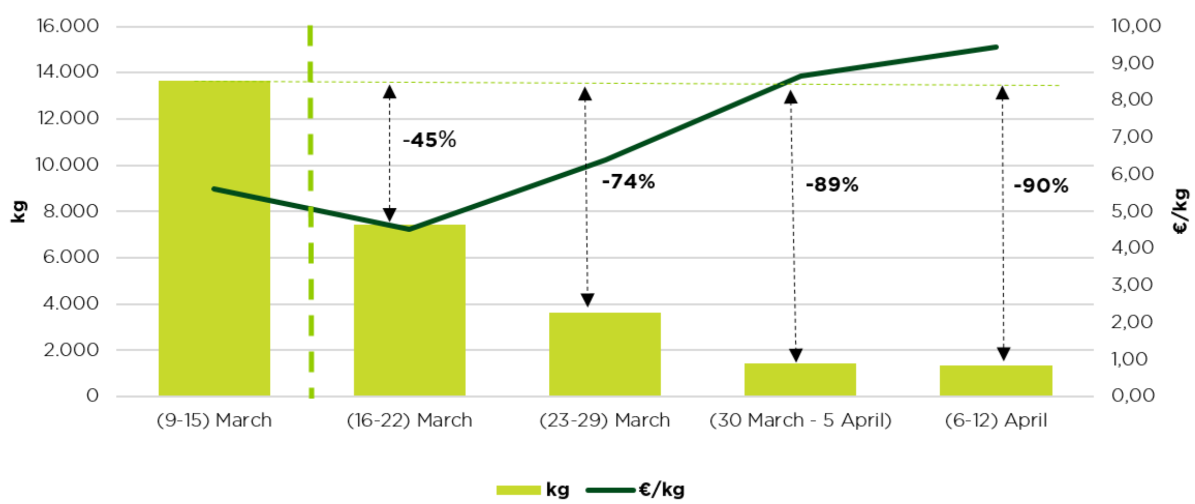

European anchovy
140.000
120.000
100.000
80.000
60.000
40.000
20.000
0
kg
4,50
4,00
3,50
3,00
2,50
2,00
1,50
1,00
0,50
0,00
€/kg
-71%
-92%
-95%
-54%
(9-15) March
(16-22) March
(23-29) March
(30 March - 5 April)
(6-12) April
kg
€/kg


Octopus
5.000
4.500
4.000
3.500
3.000
2.500
2.000
1.500
1.000
500
0
kg
8
7
6
5
4
3
2
1
0
€/kg
-14%
-54%
-55%
-15%
(9-15) March
(16-22) March
(23-29) March
(30 March - 5 April)
(6-12) April
kg
€/kg

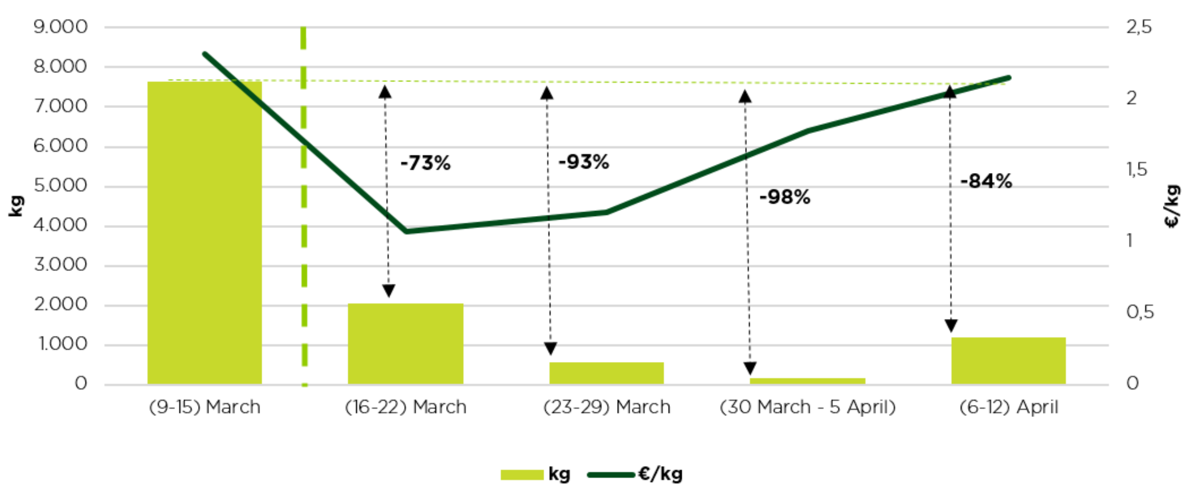
Red shrimp



Mantis squilla



Blue crab



Source: Generalitat de Catalunya.

A very abrupt change in the activity was produced after the state of the alarm activation driven by a reduction of demand due to the HORECA channel closure. In some extreme cases in Valencia community it has been reported that in some ports in the first days part of the captures weren't able to find a buyer.

Similar situations were found all around the Spanish Mediterranean. The reaction of fishermen was very quick. Health concerns together with low prices quickly lead to a decrease in their activity. This clear trend can already be seen in the first week captures after the state of alarm declaration. In some ports, as Castellon and Catalonia industrial purse seiners, decide very quickly to stop their activity. All around purse seiners have been one of the more affected segments due to the technical difficulties to ensure safe working environments in small vessels.

In most of the products this quick response was able to stop the downward trend of the price product and a fast-new equilibrium based on a decreased volume of capture was achieved (in some cases as the blue crap in Catalonia, the volume of captures remain extremely low due to lack of demand. In general purse seiners have technical difficulties to ensure healthy environments. Those that remain active soon saw that prices recovered. This is something that has been clearer in the last two weeks.

While it has not been possible to obtain detailed information on the Balearic Island evolution according to the Balearic Island government Balearic Islands first sales points in Palma (Mallorca), Sant Antoni (Eïvissa) and Formentera dropped prices by around 50%, and in Ciutadella (Menorca) by 30% in the first week. It has not been possible to get evidences on how the evolution has been in the following weeks.

A second source of information is the EUMOFA online database which provides scattered weekly information of six Spanish Mediterranean first sales points (Blanes, Palamós, Palma de Mallorca, San Pedro de Pinatar, Mazarrón, Aguilas) and 3 products (common octopus, blue and red shrimp and round sardinella), with some delay (three weeks).

An overview of the data available in the EUMOFA database can be found in Figure 11.

Not much relevant information can be obtained due to the poor data. For example, regarding blue and red shrimp, both ports (Blanes and Palamós) where information is available decided to stop their trawling activities in the last week of March[3], but this has not been the case in all red and blue shrimp relevant fishing ports.

Due to the poor amount of information the EUMOFA database cannot be used to have a picture of what is happening at the Spanish Mediterranean level.

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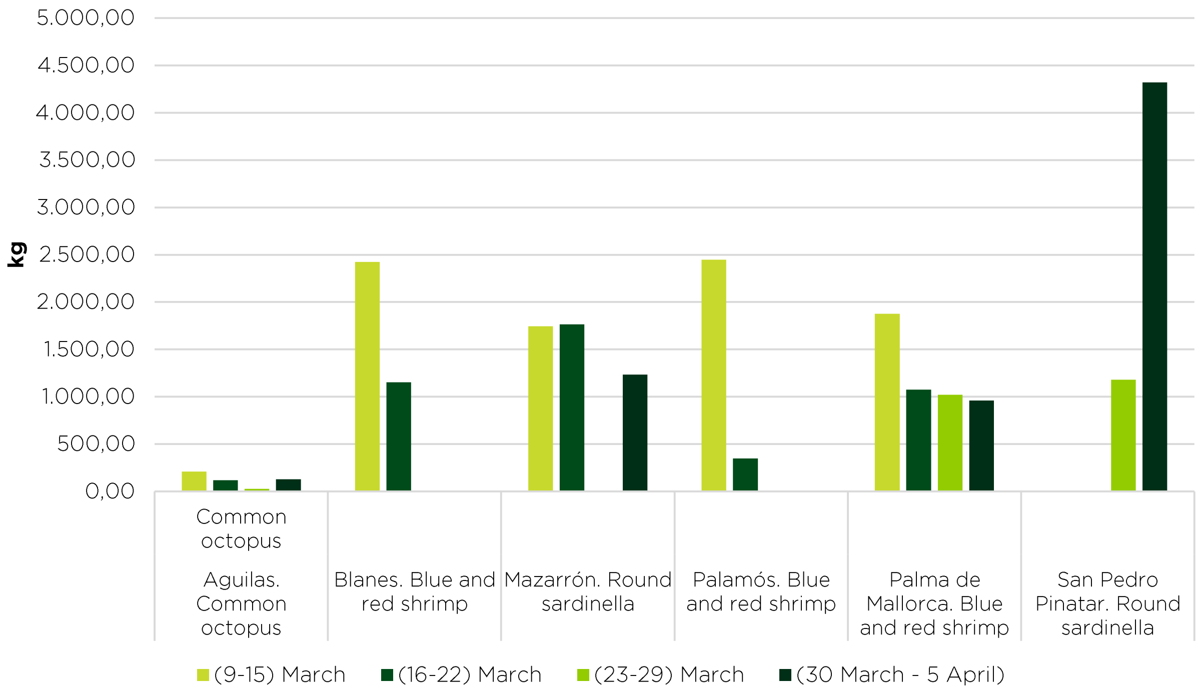
[3] Blanes decided to stop all fishing activities while Palamós decided to maintain only some small scale fisheries activities.

Figure 11. Captures in selected first sales points of the Spanish Mediterranean coast



Source: EUMOFA. Consulted on the 23rd of April. Mazarron fisheries on Round Sardinella of 23-29 have been considered an out layer (11.206,7kg).

Finally, some information has also been obtained from some public declarations of fishermen to the media:

- In Andalucia first point prices of blue and red shrimp in the first week went down by 80%. In the second week several ports reported that while prices have plummeted in first sales, they have not fallen in supermarkets (i.e.octopus are bought at 3 €/kg and sold at 6 €/kg, red mullet 3 €/kg and sold at 12 €/kg). In general fishermen claim that crustacean prices have fallen around 50%.
- In Valencia (Cullera) prices went down in the first week by between 50 % and 60 %.
- In the Confraries in the south of Catalonia in the first week prices fell between 25% and 60% in many products, especially in high value products such as prawns and crayfish.
- In Murcia in the second week of the crisis prices in first sales points were still down up to 70% in some products, such as sea bream and octopus.

3.2. Wholesale information

Without the option of obtaining better information on first sales until the regional or State Administration provides it, a complementary approach on what is happening in the market can be obtained using the wholesale MERCASA network.

Mercasa is a public entity under the Spanish General State Administration. It provides public services for the entire food chain, particularly within the wholesale fresh food sector through Red de Mercas.

Mercasa has 23 markets, the most important for fresh fish both in volume and value are Mercabarna (Barcelona), Mercamadrid (Madrid) and Mercavalencia (Valencia). Most of the fresh fish Mediterranean captures are sold near the coast so they are commercialized mainly in Mercabarna and Mercavalencia.

Figure 12. Volume and value of the Spanish Mercas

	VOLUMEN		VALOR	
	Toneladas	%	Millones euros	%
MERCALGECIRAS	2.047	0,3	8,8	0,2
MERCALICANTE	1.441	0,2	9,6	0,2
MERCASTURIAS	2.129	0,4	14,1	0,4
MERCABADAJOZ	785	0,1	3,8	0,1
MERCABARNA	178.546	30,3	1.329,8	33,3
MERCABILBAO	27.683	4,7	179,3	4,5
MERCACÓRDOBA	6.609	1,1	25,8	0,6
MERCAGALICIA	158	0,0	1,0	0,0
MERCAGRANADA	8.922	1,5	43,1	1,1
MERCAIRUÑA	3.291	0,6	24,6	0,6
MERCAJEREZ	295	0,1	1,3	0,0
MERCALASPALMAS	2.908	0,5	17,2	0,4
MERCALEÓN	1.169	0,2	7,8	0,2
MERCAMADRID	146.570	24,9	1.081,5	27,1
MERCAMÁLAGA	39.166	6,6	188,0	4,7
MERCAMURCIA	7.981	1,4	61,0	1,5
MERCAPALMA	9.709	1,6	64,5	1,6
MERCASALAMANCA	850	0,1	5,2	0,1
MERCASEVILLA	25.962	4,4	125,4	3,1
MERCATENERIFE	-	-	-	-
MERCAVALENCIA	100.077	17,0	644,0	16,2
MERCAZARAGOZA	23.418	4,0	151,7	3,8
TOTAL	589.716	100,0	3.987,4	100,0

Fuente: Elaboración propia con datos de Mercasa (2017).

Source: MERCASA. (Consumo de pescados y mariscos en España. Un análisis de los perfiles de la demanda. Víctor J. Martín Cerdeño)

Mercabarna's level of information availability is very good. It includes public daily information of the amount and value of all the fresh fish products sold in the market, including the origin of the products.

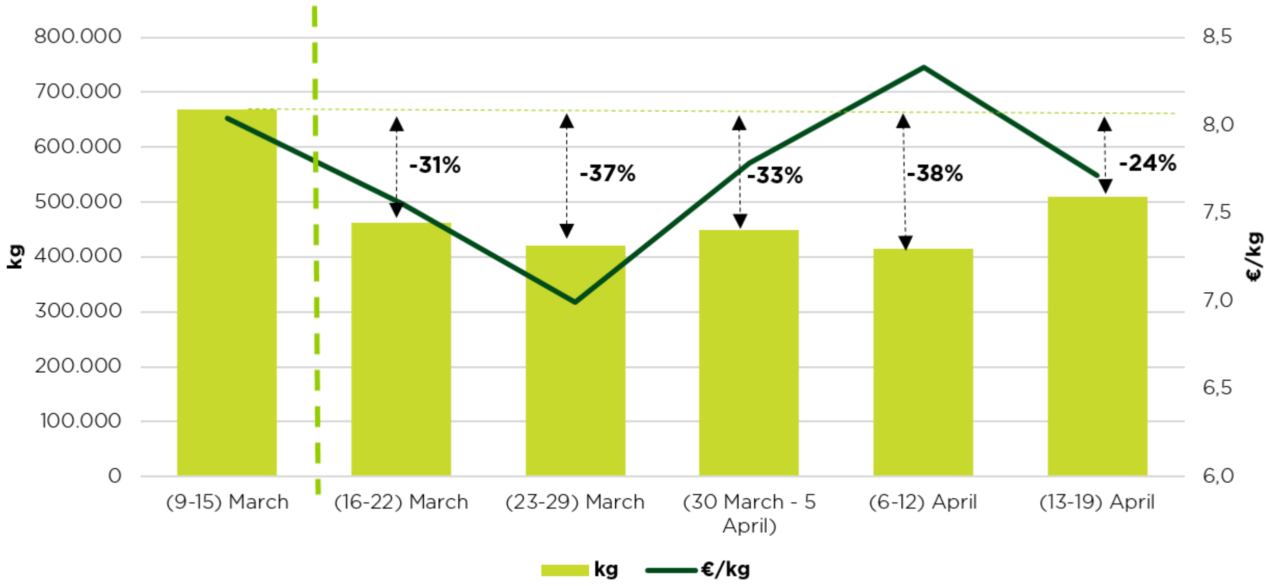
55% of the Spanish fresh fish consumption is traded in the Mercasa Network. In the Catalan case -that can be considered as significant in terms of what happens in the Spanish Mediterranean context- if we compare the volume of fish traded in Mercabarna labelled with a Catalonian register with the volume of captures registered in Catalonia Lonja's in 2018 we can estimate that the amount of Catalan captures traded in Mercabarna, under usual circumstances, is much less, around 25% of total captures in volume.

Figure 14 shows the trend on volume and price of traded fresh fish in Mercabarna during the coronavirus crisis.

We can observe a very quick response to the state of alarm. HORECA (HOtels-REstaurants-CAtering) demand dramatically fall. As a consequence, the traded amount of fish quickly decreased already in the first week of the crisis and has remained quite stable with a decrease in the following weeks, with fluctuations of between a 33% and 37% decrease. Last week some recovery can be observed, with a decrease in volume of 24% of the traded volume in comparison with the last pre-crisis registers.

Prices in the first two weeks fell dramatically, but after the new equilibrium between captures and demand was achieved, they have globally recovered (but with important differences between products).

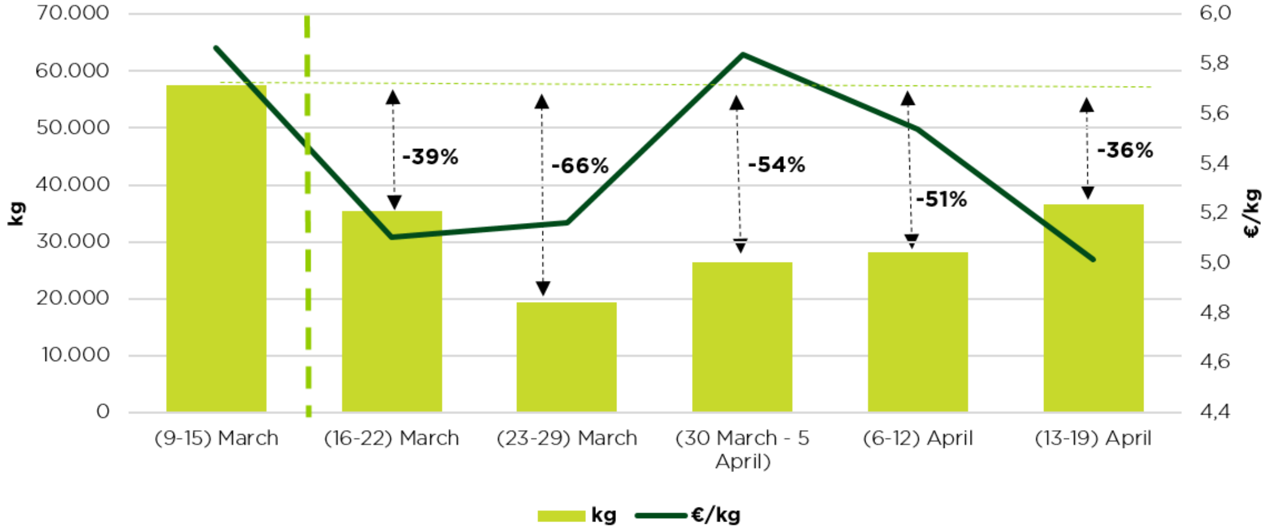
Figure 13. Fresh fish Mercabarna's sales evolution



Source: Mercabarna product statistics

If we analyse the quantity and price of fish coming from Catalan-Mediterranean waters we can observe a similar trend that the global trend but with more acute behaviour, with a maximum decrease of the traded quantity in relation to the previous week of the alarm decree approval of 66% in the second week, and a progressive recovery on the following weeks. Last week the traded volume decrease was 36%. A similar trend of fall and recovery, as we will see in the following's sections, can also observed in the Mediterranean fleet evolution.

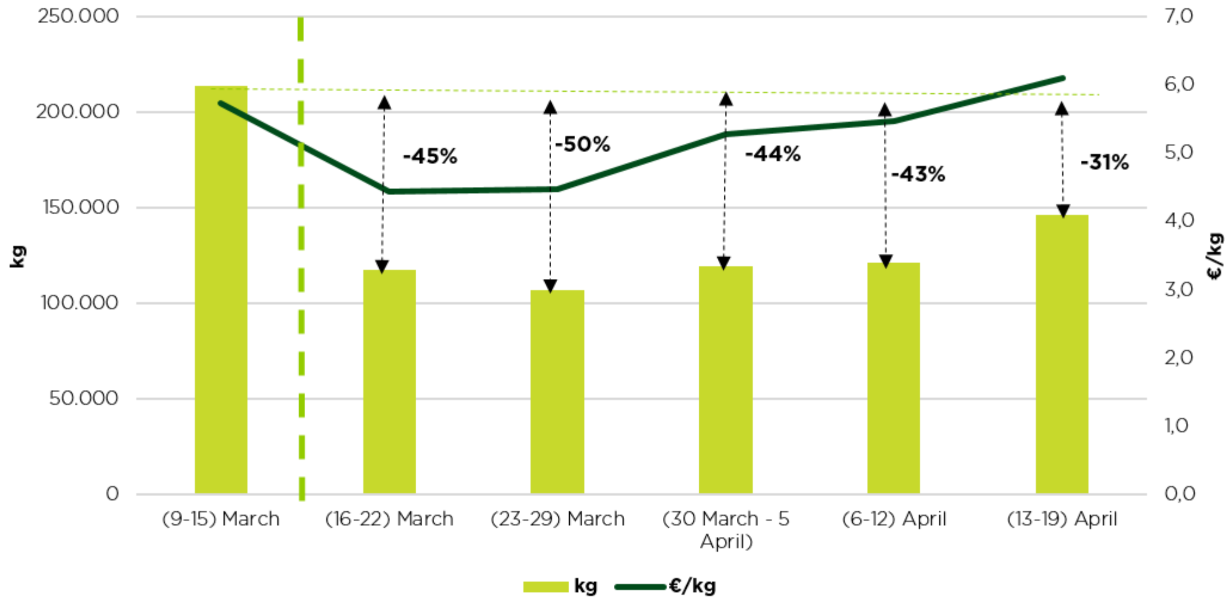
Figure 14. Catalan Fresh fish Mercabarna's sales evolution



Source: Mercabarna product statistics

If we analyze the crustaceans market evolution in Mercarbarna an even more exaggerated trend can be found. The decrease of the total traded amount in the second week (where minimum values were achieved) was 50% in comparison with the volume of the week before the state of alarm declaration. A slow recovery is also taking place in the traded volume but still the decrease was of 31% five weeks after the start of the crisis. In terms of prices after the two first weeks of shock they have fully recovered (Figure 15).

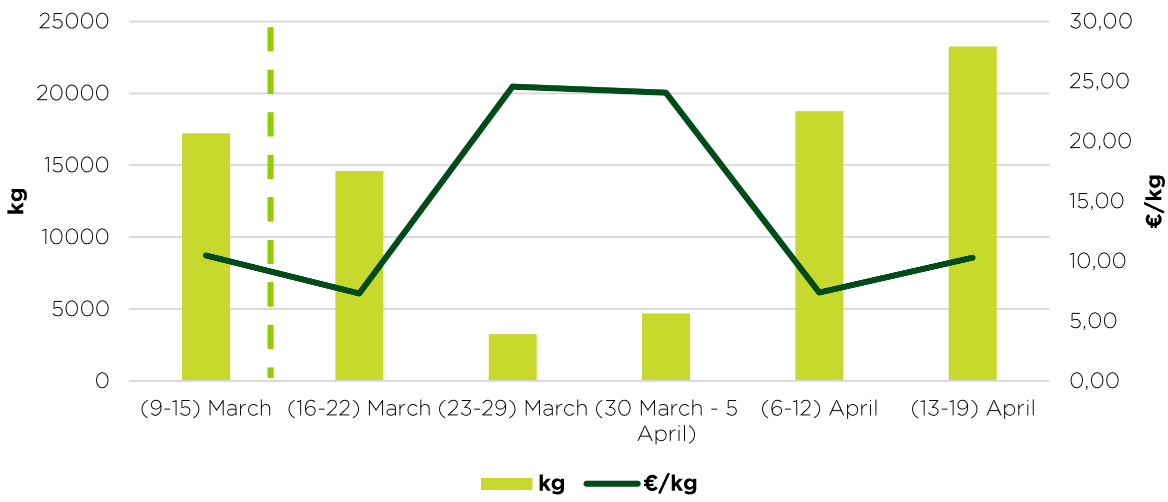
Figure 15. Crustacean Mercabarna's sales evolution



Source: Mercabarna product statistics

Trends in the Catalan crustaceans sales in Mercabarna can be found in Figure 16. A different behaviour to the global crustaceans can be observed. This is due to the fact that the volume of Tarragona's mussel production is so high (more than 9.000 kg/week in the usual circumstances) in comparison with the other products volumes, that affect the whole picture. In the second and third week there was no mussel production, and this is the main reason to explain both volumes and prices changes. A full recovery of the traded volumes in Mercabarna can be observed in the last two weeks.

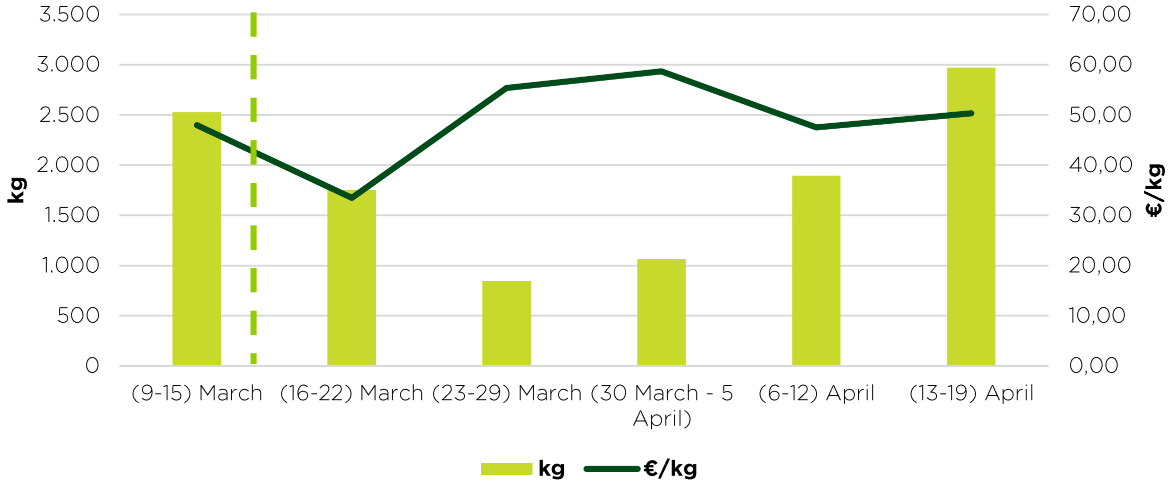
Figure 16. Catalan crustacean Mercabarna's sales evolution



Source: Mercabarna product statistics

If we focus our attention on fresh blue and red shrimp (Figure 17), a highly valuable specie, we can observe the usual pattern, including the initial shock on price, the decrease of fishing volumes, the price recovery in the last weeks and in this case we can see a total recovery of fishing traded volumes in Mercabarna, which is linked to a recovery of the fishing activity in the Mediterranean and maybe also to some transference from the usual quantities traded directly to the HORECA channel to sales in the Mercabarna market.

Figure 17. Blue and red shrimp Mercabarna's catalan's origin sales evolution



Source: Mercabarna product statistics

4. FISHING FLEET ACTIVITY

In this section we will briefly describe what is the current situation and trends in the main Mediterranean Spanish fisheries harbours. It is very difficult to have a complete picture of what is going on, since the public administration is not providing updated and complete public information. Most of this information relies on direct information provided by fishermen and in some cases from media information. As a consequence, this information should be considered as provisional.

4.1. Catalonia

There are 34 confraries (fisher guilds). Some of them are very small and don't have selling points (lonjas). We have analysed what has been the reaction to coronavirus of the 15 confraries with more vessels. They represent 83% of the fleet. They are also the main first salespoints: 98% of the Catalan captures (in volume) and 96% (in price) are sold in their facilities. ***According to our information around 80% of the vessels in most of the segments stopped their activity in the period of maximum impact (during the first two weeks), during last two weeks a clear recovery in the activity can be observed***.

There has been an important social impact in the fishing sector. According to the official Catalan Government figures on 15th of April 1514 aquaculture and fisheries workers were under a temporal labour force adjustment plans -ERTO- due to the coronavirus crisis. On the 21rst of April the figure has fallen down to 941.

Table 2. Catalan fleet evolution

Number of vessels	Trawlers	Artisanal Fleet	Purse Seine	Bottom longline	Surface longline	Others	TOTAL	Evolution
Sant Carles de la Ràpita	41	48				2	**91**	On the first weeks around 50% of trawler activity stop working, slowly they have recovered and now between 60 and 70% are active. Artisanal fleet remains active.
L'Ametlla de Mar	22	19	2	1	2	17	**62**	Confraria was closed in the period 30th March – 3rd April. 4 trawlers, 2 purse seiners, 2 surface longline and 18 artisanal vessels remain active. The situation has been quite stable with a slight recovery on the last two weeks.

Number of vessels	Trawlers	Artisanal Fleet	Purse Seine	Bottom longline	Surface longline	Others	TOTAL	Evolution
Vilanova i la Geltrú	21	24	6	5	2	2	**60**	First two weeks where the worst (at some points only 40% of trawlers were active and almost none purse seiners). Right now, trawler activity is around 70% and artisanal and purse seiners work at 90%
Palamós	23	17	4	5	1	8	**58**	Trawlers and purse seiners do not work. Around 7 artisanal vessels work every day. It is possible that next week trawlers and purse seiners will start to partially work again.
Roses	19	21	3	3		7	**53**	Trawling activity was at 25% from the second week until the 14^{th} April (4 trawlers). Purse seiners activity were almost stopped. Since then most of the activity has been recovered, 15 trawlers are active again.
Arenys de Mar	13	28	7	1	1		**50**	Cofraria was closed in the period 27^{th}-March 15^{th} April. Since 15^{th} of April 4 trawlers and the artisanal fleet are active. Purse seiners remain stopped.
Blanes	15	20	7	2	3		**47**	Cofraria and first sell point was closed the 29^{th} of March. No more information is available since then.
Tarragona	25	7	6		2		**40**	Cofraria closed in the period 25th of March-16h April. On the first weeks only 10% of fishing fleet was active. Since the 16^{th} of April most trawling start to work again. They will stop again on the 1rst of June for two months due to the yearly biological temporary cessation.
Barcelona	10	2	11			1	**24**	Trawlers are inactive under biological temporary cessation since the 30^{th} of March until 3 may. 2 artisanal vessels remain active. 8 purse seiners have stopped their activity since 15 may, and 3 continue working.
Cambrils	11	7	4				**22**	Since the 23^{rd} only 2 trawlers remain active. Purse seiners and artisanal fleet remain active.
L'Escala		11	5	1		3	**20**	On the second week onwards only 5 vessels remain active. Since the 20^{th} of April activity has recovered
Deltebre		15				5	**20**	100% active
Sant Feliu de Guíxols		11	3	1	1	2	**18**	Purse seiners are stopped. The other segments are 100% active.
Llançà	7	6		2		1	**16**	100% active since the start of the crisis
L'Ampolla	2	10		1		3	**16**	80% of the artisanal fleet and 1 trawler remain active

Source: December 2019 Vessels figures, Generalitat de Catalunya. Estadístiques pesqueres. Fleet evolution: direct confrarias information and media review.

4.2. Valencia

In the Valencian region there are 21 fishing ports with 20 confraries. The first two weeks of the coronavirus crisis most of them have remained almost totally closed and the fleet has been under labour adjustment plans (ERTO), except for the artisanal fleet. From the third week on, some ports have recovered their activity to 100%, but in most of the cases, around 50% of the fleet is yet not working.

Table 3. Valencian fleet evolution

Number of vessels	Trawlers	Artisanal fleet	Purse Seiners	Longline	TOTAL	Evolution
Alacant		4	2		**6**	100% of the fleet active
Altea	11	4	4		**19**	56% of the fleet active; 7 trawlers and 3 artisanal fleet.
Calp	13	6			**19**	73% of the fleet active; 9 trawlers and 2 artisanal fleet
El campello		10			**10**	100% of the fleet active
Dénia	18	11		1	**30**	Confraria still closed
Guardamar del segura		10			**10**	No answer
Illa de tabarca		7			**7**	95% of the fleet active
Xàbia	6	8	5		**19**	40% of the fleet active; only 1 trawler and some artisanal boats.
Moraira		3			**3**	100% of the fleet active
Santa pola	33	56		1	**90**	95% of the fleet active
Torrevieja	1	6	3	1	**11**	50% of the own fleet active; but 15-20 purse seiners from other ports have stopped auctioning here.
La vila joiosa	28	12		1	**41**	22,5% of the fleet active; 9 artisanal fleet
Benicarló	16	14			**30**	100% of the fleet active

Number of vessels	Trawlers	Artisanal fleet	Purse Seiners	Longline	TOTAL	Evolution
Borriana	8	15	4	1	**28**	78% of the fleet active; 5 trawlers, 11 artisanal fleet and 2 purse seiners
Castelló	14	17	15	3	**49**	85% of trawlers, 38% of pure seiners, 50% of surface longliners and 36% of artisanal fleet are active.
Peníscola	21	16		1	**38**	56% of the fleet active; 13 trawlers and 8 artisanal fleet
Vinaròs	8	16	3		**27**	85% of the fleet active; 7 trawlers, 2 purse seiners, 14 artisanal fleet
Cullera	14	33		2	**49**	50% of trawlers and almost all artisanal fleet active
Gandia	6	36	4		**46**	65% of the trawlers and artisanal fleet active; purse seiners not working
Sagunto	1	7			**8**	No information is available
València	6	13			**19**	No information is available

Source: December 2018 Vessels figures, Generalitat Valenciana. Fleet evolution: direct information from confraries.

4.3. Balearic Islands

The measures that have been applied by the Balearic Island confraries have been mainly driven by the decrease in demand, and are focused on Mallorca island where a 50% decrease in demand is estimated. Sales in Palma, Sant Antoni and Formentera have dropped around 50%, and in Ciutadella also 30%[4]. According to our information ~ 60% of fishing vessels, and trawlers, have decreased their activity by half.

[4] http://www.caib.es/govern/sac/fitxa.do?codi=4138193&coduo=2390901&lang=es

Table 4. Balearic Island fleet evolution

Number of vessels	Trawlers	Artisanal fleet	Purse Seiners	Bottom Longline	Surface Longline	Others	TOTAL	Measures
MALLORCA ISLAND								
Alcúdia	3	28		1	1	2	**35**	Since the 20th of March they work on alternative days
Andratx	5	6			1		**12**	Since the 20th of March they work on alternative days
Cala Ratjada	4	10					**14**	Since the 20th of March they work on alternative days
Colònia de Sant Jordi		24		1			**25**	Since the 20th of March they work on alternative days
Palma	4	17	5		1		**27**	Since the 20th of March they work on alternative days
Pollença		12					**12**	Since the 20th of March they work on alternative days
Porto Colom	1	10					**11**	Since the 20th of March they work on alternative days
Porto Cristo		9					**9**	Since the 20th of March they work on alternative days
Santanyí	4	8					**12**	Since the 20th of March they work on alternative days
Sóller	2	6		1			**9**	Since the 20th of March they work on alternative days
MENORCA ISLAND								
Ciutadella	4	2		2	4		**12**	No changes in the usual activity
Fornells		9				2	**11**	No changes in the usual activity
Maó	3	8					**11**	No changes in the usual activity
EIVISSA ISLAND								
Eivissa	4	22					**26**	No changes in the usual activity
Sant Antoni de Portmany	2	15					**17**	No changes in the usual activity
FORMENTERA ISLAND								
Formentera	2	15					**17**	Working at the same level as in winter. 2 trawlers and 8 artisanal vessels. Usually in this period the other artisanal vessels start to work (linked to the HORECA channel), they have not activated.

Source: December 2017 Vessels figures. Estadístiques de l'argricultura, ramaderia i pesca a les Illes Balears. Govern de les Illes Balears. Fleet evolution: Govern de les Illes Balears

4.4. Murcia

The Murcian fleet is rather small, with 523 fishermen, mostly in Mazarrón and San Pedro del Pinatar. Local sales in this region are closely linked to the HORECA channel, up to 70% of total sales. Aguilas, that relies very much on blue and red shrimp was the first port where a decrease in activity was decided.

Table 5. Murcia fleet evolution

Number of vessels	Trawlers	Artisanal fleet	Purse Seiners	Surface Longline	TOTAL	Evolution
San Pedro del Pinatar	7	17	2	3	**29**	No decrease of activity
Cartagena	5	27	11		**43**	80% of the purse seiners are not working, 100% on the artisanal fleet and 80% of the trawlers are active
Mazarron	9	17	3		**29**	90% of the fleet active; except purse seiners
Aguilas	7	17	2	3	**29**	No decrease of activity

Source: December 2018 vessels figures. Fleet evolution: Direct information from confraries and media review.

4.5. Andalucía

Low prices are, according to most of the declarations, the main driver to decrease fishing activities. Most of trawlers and artisanal fleet stopped the first days after the activation of the alarm decree, but soon they return to work again.

Table 6. Andalucía (Mediterranean) fleet evolution

Number of vessels	Trawlers	Seg gilnets	Purse Seiners	Drifting longlines	Set Longline	TOTAL	Situation
Adra	2	21	6			**29**	33% of trawlers and artisanal fleet active, purse seiners are under closed season
Almería	30	42	13	1		**86**	33% of the trawlers an artisanal boat active

Number of vessels	Trawlers	Seg gilnets	Purse Seiners	Drifting longlines	Set Longline	TOTAL	Situation
Carboneras	11	17	4	30	1	**63**	30% of the fleet active; 3 trawlers and 9 artisanal boats.
Garrucha	7	17				**24**	60% decrease of activity
Roquetas de Mar		10	2	5	1	**18**	60% decrease of activity
Motril	13	17	2	1	1	**34**	47% of the fleet active; 10 trawlers, 5 artisanal boats and 1 purse seiner
Estepona	6	55	5			**66**	70% of the trawlers and purse seiners active
Fuengirola	8	31	3			**42**	70% decrease of activity
Málaga		26	2			**28**	70% decrease of activity
Marbella	4	27	8			**39**	70% decrease of activity
Vélez-Málaga	18	45	16			**79**	45% of the fleet active; 12 trawlers, 20 artisanal boats and 1 purse seiner
Algeciras		26	4	1	1	**32**	No information
La Línea		54	1			**55**	No information
Tarifa		38	4		5	**47**	Mostly closed

Source: 2018 Vessels figures: GFCM register. Fleet evolution: media review and direct information from confraries

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