

THE SPANISH MEDITERRANEAN FISHING SECTOR AND ITS MARKET REACTION TO THE ONGOING CORONAVIRUS CRISIS

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 Catalanian 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).

▶ **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**





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.

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.

NOTE

This report is an in-depth urgent analysis about the evolution of the fishing sector at the spanish mediterranean coast in a daily changing environment. Thus, the data used here is preliminar and it will be completed in the future with other evaluation reports ex post.

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**LINK TO THE
FULL REPORT**

For further **information**
please contact us:

Fundació ENT

Josep Llanza, 1-7, 2n 3a
08800 Vilanova i la Geltrú
+34 93 893 51 04

info@ent.cat | www.ent.cat

