European Commission, DG MARE

Studies for carrying out the Common Fisheries Policy:
Lot 3 Socio-economic dimensions in EU fisheries

Spain/Galicia case study reports

October 2013

Universidad de Vigo
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List of abbreviations and acronyms

**FLAG**: Fisheries Local Action Groups (Coastal Action Group)

**GT**: Gross Tonnes

**GDP**: Gross Domestic Product

**GVA**: Gross Value Added

**ICES**: International Council for the Exploration of the Sea

**IGE**: Galician Statistical Institute – Instituto Gallego de Estadística

**INE**: Spanish Statistical Institute – Instituto Nacional de Estadística

**Kw**: Kilowatt
1. National background

1.1 General description of the location at the national level

Spain is in south-west Europe. With an area of 504,645 km$^2$, it is the world’s 52nd largest country and occupies the majority of the Iberian Peninsula. Spain also includes the Balearic Islands and a number of uninhabited islands in the Mediterranean Sea, and the Canary Islands in the Atlantic. Mainland Spain is mountainous, being dominated by high plateaus and mountain chains. There are three main climatic zones:

- Mediterranean: this is the dominant climate, characterised by dry, warm summers with more extreme conditions in some areas (including much of central and north-central Spain) where it is hotter in the summer and cold in winter;
- Semi-arid: in the south-eastern quarter of the country, especially in Murcia and the Ebro valley, where the dry season extends beyond the summer; and,
- Oceanic: in the northern quarter of the country - especially in the Basque Country, Asturias, Cantabria and partly Galicia - where the winter and summer temperatures are influenced by the ocean and there is no seasonal drought.

There is also an alpine climate in the Pyrenees and Sierra Nevada, and a typical subtropical climate in the Canary Islands.

Politically, Spain has a central government and 17 autonomous regional governments forming the Estado de las Autonomías (system of autonomies) that also includes two autonomous cities (Ceuta and Melilla, both located on the north coast of Africa).

The region of Galicia (29,365 km$^2$) is located in the north-west quadrant of the Iberian Peninsula. Galicia is divided into four administrative provinces (A Coruña, Lugo, Ourense and Pontevedra) and it has a total of 1,498 km of coastline. This latitudinal location in the westernmost part of the Iberian Peninsula means that the region is exposed to the ‘westerlies’ (prevailing winds) and, as a result, Atlantic atmospheric disturbances reaching land in Galicia. These air masses have widely-differing thermodynamic characteristics ranging from warm and humid (maritime tropical) to various types of cold air from higher latitudes and each with different moisture contents (for example, maritime arctic, Arctic continental and polar continental air masses).

Galicia has two distinctly different geographical areas: the coast, which is much wealthier and more densely populated; and the mountainous interior with a lower demographic density and scattered population. Northern Galicia is clearly Atlantic in character whilst southern Galicia is much more Mediterranean. This combination of relief, climate and vegetation gives Galicia a distinct personality, with the coast characterised by estuaries and an Atlantic climate and the mountainous inland area featuring a continental climate. Galicia is mild (with an average minimum temperature of 8°C and average maximum temperature of 24 °C); it has abundant rainfall that nearly always exceeds 800 mm annually, reaching its maximum in winter and minimum in summer. The hours of sunshine increase from north to south, and decrease inland from the coast, reaching 2,065 hours on average for Galicia in 2011.

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1 Instituto Nacional de Estadística – Spanish Statistical Institute ([www.ine.es](http://www.ine.es)).
2 Instituto Nacional de Estadística ([www.ine.es](http://www.ine.es)).
1.2 Demographics

In 2011, the population of Spain (Figure 1) officially reached 47 million. Spain’s population density at 91 inhabitants km\(^{-2}\) is lower than that of most western European countries, and its distribution across the country is very unequal. With the exception of the region surrounding the capital (Madrid), the most populated areas lie around the coast. The total population has more than doubled since 1900, when it stood at 18.60 million, principally due to a spectacular demographic boom in the 1960s and early 1970s. The majority of the population (Figure 2) is aged between 40 and 65 (33% in the last five years). Native Spaniards make up 88% of the total population (Figure 3). After the birth rate plunged in the 1980s and the population growth rate dropped, there was an upward trend, initially due to the return of many Spaniards who had emigrated to other European countries during the 1970s, and, more recently, large numbers of immigrants who now make up 12% of the population. The immigrants originate mainly from Latin America (39%), North Africa (16%), eastern Europe (15%), and sub-Saharan Africa (4%). A sizeable portion of foreign residents in Spain also derive from other western and central European countries. These are mostly British, French, German, Dutch and Norwegian people residing primarily on the Mediterranean coast and the Balearic Islands.

![Figure 1. Trends in Spanish population, 2001 - 2011](source: Instituto Nacional de Estadística (INE))

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3 Data source: Instituto Nacional de Estadística (National Statistics Institute, Spanish Statistical Office) ([www.ine.es](http://www.ine.es)), unless otherwise indicated.
The rate of immigration to Spain has been decreasing since 2007, whereas the rate of emigration has been increasing since 2006 (Figure 4). The net difference between the two variables notably decreased in the later years of the period 2002-2011.
Finally, life expectancy at birth is increasing for both women and men (Figure 5); life expectancy for babies born in 2011 is 85 for women and 79 for men, up from 83 (women) and 76 (men) in 2001.

![Figure 5. Life expectancy for Spanish men and women, 2001-2011](image)

Source: Instituto Nacional de Estadística

Galicia had a population of about 2.8 million in 2011 (6 % of the Spanish total), with a slight increase between 2001 and 2010 (see Figure 6). Subsequently, there was been a slight decrease of 8,101 in 2011. The average annual increase over the period was 0.23 %. In 2011, some 52 % of the population was female. The overall population density was 94 inhabitants km⁻².

![Figure 6. Trends in Galician population, 2001-11](image)

Source: Instituto Gallego de Estadística.

Most of the population is aged between 18 and 65 (Figure 7), with the greatest increase being seen among the 40-65 age group (1.33 % on average over the period). The over-65 age group also increased, by 1.02 %, while the younger age groups declined; the 0-18 group shrank by 1.05 % whereas the 19-40 age group contracted by 0.85 %.
In 2010, about 95% of the Galician population was of local origin (Figure 8), while the remaining 5% came from outside the autonomous region, particularly from Latin America. The latter were made up mainly of former Galician emigrants returning to home country from their or their grandparents’ more recent places of origin in that region.

The net migration balance was positive throughout the period 2001-2010 in Galicia (Figure 9). However, the trend turned downwards with the onset in 2008 of the ongoing (2013) economic crisis. Since 2008, departures have outstripped arrivals. Departures – especially to destinations outside Spain – rose from 5,467 in 2007 to 9,170 in 2010, while migration to the rest of Spain decreased from 22,722 to 19,672 over the same period. Young people aged 18 to 40 made up the majority of emigrants (around 70%), although immigration is also highest in that same age group, at nearly 60% of the total. By gender, the numbers departing and arriving were roughly equal at 52% men compared to 48% women in 2010 - figures that have remained stable over the past 10 years.
Life expectancy at birth in Galicia (Figure 10) is similar to that in Spain as a whole; 79 and 86 years respectively for men and women in 2010, with a rise of two years since 2001. The observed seven-year life expectancy difference between the sexes remained constant over the period.

1.3 Employment opportunities/sector overview
With a GDP of EUR 1,063,355 million in 2011, Spain has the 12th largest economy in the world, the fifth largest in the European Union, and the fourth largest in the Eurozone\(^4\). A negative GDP growth was forecasted for 2012. GDP is largely based on services. By each sector, agriculture contributes 2.3 % (with capture fisheries activity contributing less than 1 %); industry and energy 15.5 %; construction 9.3 %; services 64.7 % and net taxes 8.2 %. The Gross Value Added (GVA) from catching and aquaculture sectors represented just 0.18 % of total GVA in 2007\(^5\).

\(^4\) International Monetary Fund (www.imf.org).
\(^5\) Last available year (INE, 2010). The Input-Output Tables for Spanish economy is the single source which supplies the GVA for these activities, although jointly for both activities. The annual National Accounts aggregate all primary activities in a single sector (Agriculture, forestry and fishing) and it doesn’t allow knowing the percentage for 2011. On other hand, the Processing activities are included in “Other food industry” in the I-O Tables and in “Manufacturing industry” in the annual accounts, and then isn’t possible to obtain disaggregated data. However, and due to the relevance of these activities in the Galician economy, the IGE supplies separately the figures for both sectors (Fishing and aquaculture and Processing) in the annual Galician Account.
The Spanish economy supported more than 17.2 million full-time jobs in 2011, representing an activity rate of around 60%. Unemployment has been a long-term challenge to the Spanish economy, although there were improvements in the second half of the 1990s and during the 2000s which took a few regions closer to full employment. However, Spain suffered a severe setback after the economic crisis beginning in October 2008. The unemployment rate has surged back to 1996 levels. Currently, the number of unemployed is close to 6,000,000, and the unemployment rate was 23% in 2011 (25% in October 2012 and increasing). By economic sector, employment has been increasing significantly in the activities of the private sector (approximately 6% in 2001-11) and slightly in the public sector (approximately 2%); and decreasing significantly in construction (3% in 2001-2011), and slightly in industry (more than 2%) and in agriculture (approximately 2%). The average annual wage was close EUR 23,000 in 2011.

Galicia’s share of GDP is the seventh-largest in Spain (accounting for 5% of the total GDP): it totalled some EUR 58 billion in 2011, and is the seventh largest regional GDP in Spain. The GDP growth forecast for 2012 is 0%. The main revenue-generating sectors are food (6.4%), automotive and component production (6.1%), metallurgy (3.8%), power production (2.3%) and textiles (1.8%).

Employment in Galicia is approximately 1.10 million, resulting in a labour-force participation rate of 55.5% in 2011. The number of unemployed in 2011 approached 200,000, an unemployment rate of 20.2%. There were increases in unemployment in 2010 and 2011, especially among first job seekers (rising from 12,200 in 2009 to 18,500 in 2011) and those without work for more than a year (up from 58,200 to 116,700 in the same period).

The economic activities generating the majority of jobs are construction (7.36% of total employment in 2011), commercial activities trade (6.18%), restaurant & hotel (5.78%) and healthcare (2.93%). Fisheries and aquaculture contributed 1% of Galicia’s total employment, and the food industry contributed 2%. Both figures have been on a slight upward trend within the total employment figures for Galicia since 2009. While these activities remained relatively stable in the region, construction became progressively less important after Spain’s housing sector bubble burst; its contribution stood at 11% in 2009. The average annual wage in Galicia in 2010 was around EUR 20,000 in 2011. The GVA generated by the fishing and aquaculture was 1.38% and 1.46% in 2009 and 2010, respectively; while the GVA from processing was 0.89% and 0.84%.

1.4 Institutions and services
Spain offers comprehensive social services. In addition to free and universal healthcare for Galicians and immigrants with work permits, there are additional social security provisions. These include monthly payments of a minimum wage of EUR 641 (2011) plus pensions for permanent disability (EUR 741 in 2010), retirement (EUR 734), widowhood (EUR 483), orphans (EUR 347) and care for dependents (EUR 424), although this latter assistance was discontinued in summer 2012. In Galicia, social assistance coverage extends to those having no income; individuals may receive a minimum income (known as RISGA) aimed at integrating them society and the labour force. A minimum income is also provided to those who are unable (primarily due to illness) to cover basic, urgent needs. There are also specialised assistance centres such as elderly care residences, day-care centres for children, homeless shelters, and rehabilitation centres for those with drug addictions.
1.5 Fisheries
There are more than 250 fishing ports in Spain. In 2011, the fleet comprised 10,505 vessels, with a capacity close to 400,000 GT and 900,000 kW. Most, in particular those under 12 m long, use artisanal gears. The number of vessel by gear used is: 1,159 trawlers, 670 purse seiners, 430 long liners and 8,246 boats using artisanal gears. The majority of these vessels operate in the Cantabrian Sea and north-western Spanish waters (51%) and the Mediterranean Sea (29%). In 2011, total landings exceeded 769,000 t with a value of approximately EUR 1,822 million. In 2010, the catching sector employed around 41,000 people directly.

In Galicia, there are about 100 ports or landing points supporting a fleet of 4,734 vessels in 2011 (45% of the total Spanish fleet, excluding aquaculture vessels). Their combined capacity of 163,000 GT equated to 41% of the Spanish fleet) and 303,000 kW (34% of that of the Spanish fleet). Most were artisanal vessels of less than 10 m in length – compared to the average of 8.86 m – and were using different gears to target several species. By vessel/gear type there were 170 trawlers (operating mainly in Spanish and European waters); 161 purse seiners (operating in Spanish waters); 215 longliners (operating mainly in international and European waters) and 4,188 boats using minor gears (operating in Spanish waters). Nearly all of the Galician fleet operates in Spanish waters (95%), 2% in European waters, and 3% in international waters. In 2010, there were approximately 16,000 fishermen operating out of Galicia, or 38% of the Spanish total. In 2011, landings in Galicia totalled 183,500,000 t valued at EUR 474.8 million; these figures represent approximately 24% and 26% of Spanish landings respectively.

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8 More than 35,000 employed full time (2012).
9 Xunta de Galicia (http://mediorural.xunta.es/)
10 Ministerio de Agricultura, Alimentación y Medio Ambiente (www.magrama.gob.es).
11 Xunta de Galicia (http://mediorural.xunta.es/)
12 Xunta de Galicia (http://mediorural.xunta.es/)