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The Mediterranean fish capture and markets

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In a preliminary approach, referring to means of production, two main groups of countries can be identified in the Mediterranean; The EU countries, with larger fleets (between 8000 and 20000 units each, 80% small scale) and with a total fleet of more than 70000 units. These are fleets with high fishing capacity but fisheries administrations are trying to reduce it. The second group, are countries with smaller fleets (between 2000 and 18000 units, 90-95% small scale) and lesser individual fishing capacity. Morocco, Algeria, Tunisia, Libya, Croatia, Turkey and Egypt with a total of around 65000 units.

In many cases, these fleets include an important percentage of not powered boats; however, these countries are developing their fleets, increasing the number of vessels and improving their technological characteristics. (A third group, less important, with smaller fleets under development, is performed by a group of small countries or with a reduced littoral - Israel, Lebanon, Syria, Malta, Cyprus, Albania and Slovenia - that totalized, all together, around 5000 vessels in some cases not powered or even undecked). Looking at the employment, can be pointed out that the crew members in vessels of similar characteristics is bigger in fleets of the two last groups than in those of the EU countries. That explains why in these countries concentrate two thirds of the total employment in the region.

The demand for fishery products in the EU countries and the relative shortage in relation to demand, together with the decrease in landings due to overfishing and to the reduction of fishing fleets, are forcing prices up. The EU countries present a high consumption, growing despite the resource limitations. The demand is much bigger in the EU member as well as in Israel than in the rest of countries. Inside the EU, Portugal (58 Kg.) and Spain (41Kg.) have the highest consumption, meanwhile the other member countries and candidates have a consumption between 20 and 30 Kg per capita and year. In the non EU countries the consumption is relatively low, with a level under 10 Kg per capita and year. This scenario is also stimulating the development of fisheries in the southern and eastern countries, where the sector provides a real source of income and employment.

The fact that the southern Mediterranean countries are not too far from the European markets, where there is high demand, means that these countries have an advantage over other countries around the world, because they can provide fish rapidly and without any major conservation problems. It must also be borne in mind that developing these fishing industries does not require significant investment, a fact which explains the rapid growth observed in the past few years. This process is currently having a positive impact on the immediate development of fisheries in the southern countries, but it could jeopardise it in the future. Given the limitation of resources, it is only if production allows their sustainability that fishing will contribute positively to development in southern countries, i.e. to investment recovery and employment stability, as well as providing a supply to EU consumers.

The evolution of population concentrated in the Mediterranean region as well as their distribution between northern and southern Mediterranean countries, together with the trade processes and the consumer habits, are major elements to be taken into consideration in relation with the demand of fishing products and markets. In addition, it has to be taken into account that the Mediterranean is the biggest tourist region in the world, with tourism increasingly concentrated on the coasts and heavily seasonal.

Furthermore, in the EU countries the costs of exploitation are going up because the need for improving the fishing techniques constantly, but at same time the incomes go down or remain stables because the reduction of the resources and the globalization of markets. This phenomenon has an impact over the wages; related directly with the landings in a wage system based in a proportion of the sales. When the wages go down, many crews go outside of the activity to find best wages in other sectors. Recently, many of these jobs in the northern fleets are covered by fishermen from the southern countries. They are coming from a labour market with an average wages under the ones of EU countries and for this reason they accept to work on the European fleets when the local fishermen don't.

The result is a migratory movement from Morocco to Spain, Algeria to France, Tunis and Albany to Italy, Egypt and Turkey to Greece. However, it is probable that if wages not improve, with a new equilibrium between cost and resources state, those of these new workers that will remain in the northern countries will probably move to the other sector of activity in the medium term. The evolution of this situation it is uncertain because the fisheries policies in both sides, EU and non EU countries, are not clear. There are real options for future, mainly based in the introduction of sustainable practises in the exploitation of resources and valorization and traceability of Mediterranean fishing products as well as transparency in the EU and non EU fishing markets, however at moment it is not clear if these elements will be incorporated at the Fishing Policies or not.