

# Spain



UK seafood industry exports from Spain 2018*		
Fish type	Value, £	Weight, tonnes
Tuna	34,260,527	6628
Octopus	7,048,426	1239
Anchovies	8,081,261	795
Cod	3,864,567	788
Warm Water Shrimps and Prawns	5,319,065	661
Squid	2,012,524	517
Other Fish	3,085,601	401
Seabass	1,651,328	259
Cold Water Shrimps and Prawns	1,766,774	242
Other Shellfish	1,070,494	207
Mixed	608,203	191
Crayfish	315,367	154
Sardines	475,396	134
Mackerel	250,688	121
Mussels	340,381	115
Surimi	421,177	94
Turbot	800,162	92
Horse/Jack Mackerel	243,330	80
Swordfish	621,975	79
Caviar	226,162	75
Prepared and Preserved Shrimps and Prawns	754,172	71
Cuttlefish & Squid	193,035	68
Hake	195,852	46
Seabream	192,921	36
Ornamental	335,987	32
Crabs	111,856	24
Redfish	15,164	22
Monkfish	118,622	13
Other Flat Fish	87,030	11
Lobster	208,312	10
Haddock	40,895	10
Salmon	63,873	6
Carp	19,643	6
Cuttle Fish	20,095	4
Eels	76,106	4
Herring	23,059	3
Scallops	27,972	3
Clams, Cockles and Arkshells	1,450	2
Toothfish	6,092	1
Sole	10,993	1
Plaice	3,723	1
Offal	350	0

\*Source: Her Majesty's Revenue and Customs (HMRC).

## Introduction

This report is part of a series of country risk profiles that are designed to provide an understanding of the social risks associated with source countries that play a key role in the UK's seafood industry. Each report covers risks related to the production and processing of wild catch and aquaculture seafood products.

This report covers issues such as labour rights, working conditions, illegal fishing and impacts of the industry on local communities; and the mitigation efforts and regulatory frameworks put in place to address these issues.

This country risk profile has been compiled by Verisk Maplecroft on behalf of Seafish. Information on issues has been collated from publicly available sources, varying from international rankings and ratings, research by academics and other organisations, through to media articles. It has been prepared for general information only. You should not rely solely on its contents; always verify information from your own suppliers in your own supply chain. References for all information sources are provided.

## Overview

Spain has over 8,000 km of coastline, with varied landscape and climate, which give it the environmental characteristics ideal for the development of marine and freshwater aquaculture. This attribute has positioned the country in top place as the largest producer of fish in the EU by volume.<sup>1</sup> Major seafood exports from Spain to the UK include tuna, anchovy, octopus, squid, seabass, shrimp and cod.

## Social risks

**Social risks related to Spain's fishing industry are generally low, linked to the country's comprehensive regulatory framework and adherence to international standards.** Membership of the EU means that the industry is well-regulated and monitored, while working conditions are also mandated by EU regulations. As such, the main social challenge to the fishing and aquaculture industry is increased social concern linked to environmental issues. This risk is somewhat mitigated by regular and transparent reporting by the EU and the Spanish government, as well as increased industry commitments to sustainable fishing.

**Within the context of Spain's comprehensive regulatory framework, labour issues pose the greatest challenge to the industry.** The majority of aquaculture sector workers are self-employed. Statistics compiled by the Ministry of Agriculture, Fishing and Food (MAPA) show that 8,295 people were employed in the maritime fishing industry in 2017,<sup>2</sup> while 16,151 were employed in the marine and freshwater aquaculture sector.<sup>3</sup> Of those in the aquaculture sector, more than half were self-employed (9,324). While this reflects the flexibility of Spain's labour market, it also poses several labour rights risks. In particular, a lack of permanent staff may put less pressure on companies to maintain high labour and working standards, leading to a greater risk of accidents due to lower standards and reduced workplace training.

**Precarious work undermines working conditions in Spanish aquaculture, potentially presenting reputational and operational risk to investors.** In 2016 (latest data available), there were 33,025 non-fatal injuries in the fishing and agriculture sector,<sup>4</sup> placing it mid-ranking within Spain's economic sectors in terms of propensity for workplace injuries.

**Freedom of association and strike action are permitted by Spain's labour regulation and often utilised by workers in the fishing and aquaculture industry.** For example, in 2013 workers at the six Spanish sites of Norwegian aquaculture producer Stolt Sea Farm went on strike to protest against proposed changes to working conditions,<sup>5</sup> while in 2017 workers at Pescanova did the same.<sup>6</sup> The industry can also be disrupted by strikes along the supply chain, such as a 2019 port strike or transport strikes, which delay the export of fish.<sup>7</sup>

## Regulations and risk mitigation

**Spain's health and safety regulations for the seafood sector are appropriate for improving the safety of workers.** Spain has ratified almost all of the ILO Conventions that govern the criteria that seafarers should meet. The most noteworthy Convention ratified is the Maritime Labour Convention 2006 (MLC 2006). It consists of 300 rules that cover operations, personnel requirements, health and safety, maintenance, documentation and other key aspects of commercial maritime operations. It also seeks to limit social dumping to secure fair competition for ship owners who respect seafarers' rights.<sup>8</sup>

The Spanish Government takes significant steps to close down on illegal fishing – a crime that can involve serious human rights violations. Over the last decade, Spanish authorities have launched investigations to fight illegal fishing – a major cause of overfishing which disadvantages legal fishers. The country has received recognition from WWF and Oceana for its new fisheries law (Law 33/2014), which is also the first to link to the EU's regulation on illegal, unreported and unregulated (IUU) fishing activities.<sup>9</sup> Law 33/2014 requires all EU Member States to take action against citizens and/or companies found to be involved in IUU fishing activities in the world. The law introduced a doubling in the value of fines imposed on those involved and increased sentence lengths in an effort to deter illegal behaviour.<sup>10</sup>

## International conventions and rankings

The following tables indicate which International Labour Conventions Spain has ratified. The ratification of these conventions is a good indicator of a source country's commitment to enforcing internationally accepted best practices in the seafood industry when combined with thorough national legislation and well-resourced enforcement mechanisms.

International Labour Organization (ILO) Conventions	Ratification
Freedom of Association and Protection of the Right to Organise (No. 87)	Yes
Right to Organise and Collective Bargaining (No. 98)	Yes
Forced Labour (No. 29)	Yes
Abolition of Forced Labour (No. 105)	Yes
Equal Remuneration (No. 100)	Yes
Discrimination (Employment and Occupation) (No. 111)	Yes
Minimum Age (No. 138)	Yes
Worst Forms of Child Labour (No. 182)	Yes
Hours of Work (Industry) (No.1)	Yes
Weekly Rest (Industry) (No.14)	Yes
Protection of Wages (No. 95)	Yes
Minimum Wage Fixing (No.131)	Yes
Occupational Safety and Health (No. 155)	Yes
Occupational Health Services (No. 161)	No
Labour Inspection (No. 81)	Yes
Private Employment Agencies (No. 181)	Yes
Maritime Labour Convention (No. 186)	Yes
Work in Fishing Convention (No. 188)	No

United Nations (UN) Conventions	Ratification
Convention against Transnational Organized Crime and the Protocol to Prevent, Suppress and Punish Trafficking in Persons, Especially Women and Children	Yes
Convention against Transnational Organized Crime	Yes
Convention for the Suppression of the Traffic in Persons and of the Exploitation and the Prostitution of Others	Yes
Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families	No
Convention to Suppress the Slave Trade and Slavery	Yes
Supplementary Convention on the Abolition of Slavery, Slave Trade and Institutions and Practices Similar to Slavery	Yes

Other Conventions	Ratification
FAO Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing	No

# Rankings in global indices

## US Department of State Trafficking in Persons (TIP) Report

The TIP report is released annually by the US Department of State and offers a summary of the laws and enforcement efforts of various countries with respect to human trafficking. Specifically, it ranks countries based on a '3P paradigm' of prosecuting traffickers, protecting victims and preventing crime. Scoring on these elements is then collated to give each country a ranking. The rankings range from Tier 1, which indicates governments of countries that fully comply with the Trafficking Victims Prevention Act (TVPA) minimum standards for the elimination of trafficking to Tier 3 for the governments of countries that do not fully comply with the TVPA's minimum standards and are not making significant efforts to do so.

### Rating: Tier 1

According to the US Department of State's 2019 Trafficking in Persons report, Spain fully meets the minimum standards for the elimination of trafficking.<sup>11</sup>

## Global Slavery Index

The 2018 Global Slavery Index measures the extent of modern slavery country by country, and the steps governments are taking to respond to this issue, to objectively measure progress toward ending modern slavery.

There are two rankings:

1. Rankings of countries by prevalence of the population in modern slavery. Rankings range from 1 to 167 - with 1 the worst and 167 the best, in terms of the prevalence of slavery.
2. Rank of countries in terms of Government response to the issue. This is an indication of how are governments tackling modern slavery.

**For prevalence Spain ranks: 124/167 (where a ranking of 1 indicates highest risk).**

The Global Slavery Index rates Spain as low risk for the prevalence of forced labour and gives the government a good rating for its response to the issue.<sup>12</sup>

In terms of Government response Spain ranks BBB. This indicates the government has implemented key components of a holistic response to some forms of modern slavery with victim support services, a strong criminal justice response, evidence of coordination and collaboration, and protections in place for vulnerable populations. Governments may be beginning to address slavery in supply chains of government procurement, or of businesses operating within their territory. There may be evidence that some government policies and practices may criminalise and/or cause victims to be deported.

## EU Illegal, Unreported and Unregulated Fishing Carding Process/Watch List

Under the IUU Regulation, non-EU countries identified as having inadequate measures in place to prevent and deter this activity may be issued with a formal warning (yellow card) to improve. If they fail to do so, they face having their fish banned from the EU market (red card) among other measures.

**Spain is not listed on the EU IUU watch list.**

**Endnotes**

- 1 Eurofish, 2017, Overview of the Spanish fisheries and aquaculture sector, Available at <https://www.eurofish.dk/spain>
- 2 MAPA, estadísticas 2017: [https://www.mapa.gob.es/images/es/2017\\_06\\_empleo\\_estratos\\_local\\_tcm30-121815.pdf](https://www.mapa.gob.es/images/es/2017_06_empleo_estratos_local_tcm30-121815.pdf)
- 3 MAPA, estadísticas 2017: [https://www.mapa.gob.es/images/es/2017\\_01\\_empleo\\_tipo\\_tcm30-121821.pdf](https://www.mapa.gob.es/images/es/2017_01_empleo_tipo_tcm30-121821.pdf)
- 4 ILO, OHS statistics by country: [https://www.ilo.org/ilostat/faces/oracle/webcenter/portalapp/pagehierarchy/Page27.jspx?subject=OSH&indicator=INJ\\_NFTL\\_ECO\\_NB&datasetCode=A&collectionCode=YI&\\_afLoop=1064306991742709&\\_afWindowMode=0&\\_afWindowId=dfs3tmptv\\_1#%40%40%3Findicator%3DINJ\\_NFTL\\_ECO\\_NB%26\\_afWindowId%3Ddfs3tmptv\\_1%26subject%3DOSH%26\\_afLoop%3D1064306991742709%26datasetCode%3DA%26collectionCode%3DYI%26\\_afWindowMode%3D0%26\\_adf.ctrl-state%3Ddfs3tmptv\\_78](https://www.ilo.org/ilostat/faces/oracle/webcenter/portalapp/pagehierarchy/Page27.jspx?subject=OSH&indicator=INJ_NFTL_ECO_NB&datasetCode=A&collectionCode=YI&_afLoop=1064306991742709&_afWindowMode=0&_afWindowId=dfs3tmptv_1#%40%40%3Findicator%3DINJ_NFTL_ECO_NB%26_afWindowId%3Ddfs3tmptv_1%26subject%3DOSH%26_afLoop%3D1064306991742709%26datasetCode%3DA%26collectionCode%3DYI%26_afWindowMode%3D0%26_adf.ctrl-state%3Ddfs3tmptv_78)
- 5 Undercurrent News, 'Workers at Stolt Sea Farm in Spain go on strike', 13 December 2013, <https://www.undercurrentnews.com/2013/12/13/workers-at-stolt-sea-farm-in-spain-go-on-strike/>
- 6 Fish Information and Services, 'Nueva Pescanova's workers to go on strike', 3 June 2017, <https://fis.com/fis/techno/newtech.no.asp?l=e&id=90341&ndb=1>
- 7 Ports Europe, 'Trade unions call off strike at Spanish ports' 16 April 2019, <https://www.portseurope.com/trade-unions-call-off-strike-at-spanish-ports/>
- 8 International Labour Organization, Maritime Labour Convention, 2006, as amended (MLC, 2006), Available at [https://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:91:0::NO::P91\\_INSTRUMENT\\_ID:312331](https://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:91:0::NO::P91_INSTRUMENT_ID:312331)
- 9 WWF, 16 January 2015, Spain announces law to fight pirate fishing, Available at [http://wwf.panda.org/wwf\\_news/successes/?242046/Spain-announces-law-to-fight-pirate-fishing](http://wwf.panda.org/wwf_news/successes/?242046/Spain-announces-law-to-fight-pirate-fishing)
- 10 ClientEarth, June 2017, The control and Enforcement of Fisheries in Spain, Available at <https://www.documents.clientearth.org/wp-content/uploads/library/2017-09-29-the-control-and-enforcement-of-fisheries-in-spain-ce-en.pdf>
- 11 United States Department of State, June 2019, 2019 Trafficking in Persons Report: Spain. Available at <https://www.state.gov/reports/2019-trafficking-in-persons-report-2/spain/>
- 12 Global Slavery Index, 2018, Country Data. Available at: <https://www.globalslaveryindex.org/2018/data/country-data/spain/>

For further information see the **Seafish ethics in Seafood** web page.  
Available at: <https://www.seafish.org/article/ethics-in-seafood>