

SEAFOOD MARKET IN BRIEF

Spain is the European Community's largest consumer of fish products with a per capita consumption of over 31 kilograms per annum. To date, Spain maintains the largest fishing fleet in the EC which supplies a large portion of domestic fisheries requirements. However, the consumption demands require the importation of significant quantities of seafood products. In addition, Spain is losing access to numerous foreign fishing grounds which will inevitably create a larger demand for imported fisheries products. Statistics released by the Spanish Ministry of Agriculture, Fisheries and Food indicate that in 1991, Spaniards consumed 880,324.5 pesetas per capita of fish products in their food purchases which represented 11.8% of total food purchases for the year.

Spain is a relatively stable and conservative market for imported seafood, but with a well established demand for a large variety of species and product forms. Spanish consumers are well served in all urban areas by numerous small retail fish stores as well as the traditional local markets (which house retailers of all types of fresh and frozen foods), and a comprehensive network of modern supermarket chains. Fresh fish may be purchased through all of these outlets. Profound changes in consumption patterns have occurred in recent years and Spaniards are rapidly adopting the more varied eating habits and taste preferences evident in other western European countries. Increased living standards, combined with an increase in female participation in the workforce, has helped create a growing demand for new products and species, as well as greater demand for prepared and luxury seafood products.

As Spanish fishing fleets are forced to venture farther from home ports in search of viable fishing grounds, domestic processors are being pressured to accept a greater supply of frozen seafood products. As a result, a previous low demand for frozen seafood products in Spain is disappearing as more frozen product forms are gaining greater acceptance with Spanish consumers. An increased reliance on frozen seafood is creating new opportunities for many Canadian frozen export products. In addition, the ease of preparation for prepared and microwaveable seafood products is prompting many Spanish consumers to increase the use of value-added fisheries goods. As such, the demand for seafood products from Canada is currently strong and growing in Spain.

Cod and hake are two species which are in great demand in Spain, along with various species of pelagics and cephalopods. Spanish consumers have a long tradition of eating dishes such as paella which is a combination of whitefish and cephalopods prepared in stew form, and tapas which is a type of appetizer or snack, and many traditional Spanish dishes have called for cod for hundreds of years. In addition to these species, products like flounder, plaice, squid, gooseneck barnacles, baby eels, monkfish tails, lobster, shrimp and salmon are also developing greater acceptance by consumers.