

quota (5500 tonnes). The Spanish preference is for the larger sizes (1 kg +) with smaller sizes re-exported to Portugal.

Demand also exists for frozen butterfly cod (similar to split fish with centre bone removed). This product is used to prepare rectangular shaped portions which are a very popular product in retail pack.

A small but growing market also exists for skinless cod fillets both fresh and frozen.

Frozen Hake

Hake is by far the most important groundfish species consumed in Spain. H and G Hake is landed fresh by Spanish vessels and also produced in frozen-at-sea form. In 1987, fresh landings of hake and whiting amounted to 71,000 tonnes while frozen hake and whiting accounted for 78,000 tonnes. In addition Spain imported 86,000 tonnes of hake and whiting in 1987, principally from the EEC, Chile and Argentina.

The true hake (*M. merluccius*) is the dominant species consumed and is sold mainly in fresh form, largely as whole fish and steaks. This product best resembles halibut in eating quality and reaches prices as high as \$40 Canadian per kilo at the wholesale level. True hake is supplemented by fresh Chilean hake (*M. australis*) which is airfreighted to Spain. However, wholesale prices are normally only half those of the true hake. Both the Spanish and Chilean hake produce the large size fish favoured by consumers. The smaller size Canadian silver hake (*M. bilinearis*) or North Pacific hake (*M. productus*) would seem to have little potential in the Spanish market. However, the larger size red hake (*Urophycis chuss*) may have scope for development and a number of Spanish importers expressed interest in receiving offers for frozen product. The import quota for frozen H and G hake is 22,700 tonnes. Demand also exists for frozen hake fillets both skin on and skinless.

Manilla Clams

Spain is rapidly becoming Canada's most important market in Europe for live little neck clams (*Tapes philanarium*) replacing Italy which has begun to culture a similar product. While exports accounted for only \$125,000 in 1987, it was one of the more actively sought-after products during the mission and there is substantial scope for expanding Canadian exports.