

SPAIN

SUPPLY AND CONSUMPTION

Spain has the largest fishing fleet in the EEC, with landings of approximately one million metric tons per year. Imports of fish products continue to increase steadily reaching 715,000 metric tons, valued at over \$2 billion in 1987. Total annual domestic consumption of seafood is 1.4 million metric tons, equal to 36 kilograms per person, the second highest seafood consumption in the world next to Japan. Spanish imports of fresh salmon in 1989 totalled 19,918 metric tons, with Norway supplying 9,106 metric tons and Canada supplying none. Spain did however purchase 52 metric tons of frozen Pacific salmon from Canada; 3 metric tons of frozen Atlantic salmon; and one metric ton of both smoked salmon and canned salmon.

Marketing initiatives by Norwegian suppliers in Spain during recent years have been persistent and highly successful. Product is delivered by air transport and has an additional advantage because fresh salmon is imported at a lower tariff rate than frozen. The Spanish market for salmon has given preference to farmed Norwegian salmon which is either sold as steaks, or smoked by Spanish salmon producers.

TARIFFS

Imported salmon products entering the Spanish market are subject to the following tariff rates: fresh salmon, Canada 1.3 percent, the EEC nil; frozen salmon, Canada 6.2 percent, and the EEC 4.9 percent; smoked salmon products, Canada 13 percent, and the EEC 4.1 percent; and for canned salmon, Canada 11.6 percent, and the EEC 6.1 percent.