

knowledge of what appeals to the Spanish consumer. Canadian exporters are encouraged to participate at major food shows such as Alimentaria which is held annually in Barcelona. The last show attracted 4,500 exhibitors and 500,000 visitors.

Both fish wholesalers and the fish retailers associations in Barcelona expressed keen interest in expanding contacts with Canadian authorities and suppliers and furthering the mutual education which must now ensue if Canadian exporters are going to exploit what is perhaps the last major untapped market for Canadian fish products in Europe.

PRODUCTS OF INTEREST TO SPANISH IMPORTERS

Wet Salted Cod

In 1987 wet salted cod was Canada's largest fish export to Spain amounting to \$3.8 million. There is little demand in Spain for dried salted cod. Virtually all product is imported in wet salted form. Spain has traditionally obtained most of its supplies from Iceland. While the product is available in retail stores throughout the country the major consumption centres are in northern and eastern Spain. The market for salt cod is very competitive and Canadian salt cod tends to be purchased on a price basis.

An impediment to the trade is the quota system, and the need for import licenses. Allocations are granted on a quarterly basis and there is a requirement to deposit 5% of the value of the shipment to obtain an import license. If the supplier fails to deliver, the deposit is forfeited. While the importer has three months to complete the transaction, to be successful the trade depends on confidence between buyers and sellers and the capacity of suppliers to fill orders and meet delivery dates. Given the relatively large size of Canadian salt cod exports the Spanish measures have not proved to be a significant barrier to trade.

Frozen Cod

Spain has a large fish processing sector which utilizes considerable quantities of headless and gutted cod for further processing into fillets and steaks and the production of prepared seafood dishes. The country also imports fresh H and G cod which is imported under annual