

The Post in Madrid has identified 10 seafood products for which it believes there are good prospects for Canadian seafood exporters, as noted below.

1. Wet salted cod
2. Frozen flounder, plaice and similar
3. Fresh & frozen cod, including fillets
4. Frozen fish blocks
5. Live & frozen lobster
6. Live gooseneck barnacles
7. Canned salmon
8. Fresh & frozen salmon
9. Frozen monkfish tails
10. Frozen prawns and shrimp

### **SALMON**

Marketing initiatives by Norwegian suppliers in Spain during recent years have been persistent and highly successful. Product is delivered by road transport (not by air) in refrigerated containers, which allow it to be sold as fresh, 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. 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.

### **LOBSTER**

Fisheries landings by species are not published by the Spanish government, but the domestic lobster catch is small and only meets a fraction of demand. Traditional preference in Spain has been for domestic lobster (some *Homarus*, but mostly spiny) from the Galicia region in northwest Spain, followed by spiny lobster imported from the United Kingdom, Eire and France. Third in order of preference is spiny lobster from Morocco, then North American lobster for which there is a growing recognition and acceptance. Imports from Portugal (Azores) are mostly rock lobster, considered inferior in quality. Cuban lobster is at the bottom of the list, but sells well due to the low price and constant availability. The latest Spanish customs statistics are for 1991 and show the following imports: H.S.0306.11 frozen (426 tonnes); 0306.12 frozen/in brine (2890 tonnes); 0306.22 live (955 tonnes); and 1605.3 meat/cooked (7 tonnes). Total C.I.F. value for all imports of lobster in 1991 was approximately Cdn\$1 million.

For airfreight, live product is shipped to Madrid, Bilbao, or Barcelona. Trans-shipment through other European airports, is now being avoided at all costs, due to the inspection delays and added costs for inspection/testing introduced on January 1, 1993. Spanish importers represent the first link, as they are the main suppliers to wholesalers, retail outlets, and restaurant trade, which usually do not import for their own account. All Spanish food importers must be registered with the Ministry of Health and are identified by their registration number. Spanish importers are legally responsible for the goods they introduce into the Spanish marketplace from outside the EEC.