

economy and growing affluence along with increased female participation in the work force has helped create a growing demand for new products/species and for more prepared and luxury seafood products.

This change in consumption habits is clearly demonstrated by a visit to an ultra modern Spanish supermarket where one observes a remarkably varied display of seafood representing the whole range of fish products from fresh whole fish to processed frozen fillets and portions, a large variety of molluscs and shrimps, as well as seafood salads, smoked salmon and other ready to eat products. There is also the large section devoted to salt cod in a variety of forms but mainly in small blocks in eye-catching controlled atmosphere packaging. One also notes the relatively small amount of shelf space devoted to both breaded and battered products and prepared dinners compared with North American and other western European countries. The potential for the latter products is believed to be largely untapped.

The Mission visited the large wholesale fish markets in Madrid and Barcelona. Here also one gets a good sense of the scale of activity and the enormous variety and different forms of product traded. The Madrid wholesale market, Mercamadrid, is second in size only to that of Tokyo. More than 150,000 tonnes of fish products pass through the market each year. Product arrives at the market daily from the main European fishing ports and by air from overseas. Some 150 wholesalers operate at Mercamadrid and sell directly to the food service sector, retail fish shops, distributors and other smaller wholesalers in the market. The market, which also handles fruit and vegetables attracts some 10,000 retailers every day.

The mission encountered a remarkable interest and enthusiasm for Canadian products on the part of Spanish importers. The most serious obstacle appears to be lack of Canadian knowledge of local needs and tastes and the remarkable segmentation and sophistication of the Spanish market. The most telling counsel the mission received from major wholesalers was to spend the time to understand this vast market and to study and copy the techniques of successful exporters in Iceland, France, and elsewhere.

The Canadian exporters were advised in effect that they cannot merely sell fish into Spain - they will have to market their products in light of profound