

SPAIN

Introduction

- Spain is the fastest growing economy in the European Community and represents virtually a new market for Canadian seafood.
- Spain is second only to Japan in fish consumption with per capita consumption of some 30 kilos per capita.
- Spain operates one of the world's largest fishing fleets and is the least import dependent of the EC countries.
- Nevertheless in 1987 Spain imported about \$1.5 billion out of a total seafood market of \$4 billion and imports are increasing. In 1985 imports were \$800 million.
- Canadian fish exports to Spain reached a high of \$22 million in 1980. Exports virtually ceased after 1982 when Spain imposed an "unofficial" import ban.
- The ban was lifted in 1986 and by 1988 exports had grown to \$9.7 million.

Main market characteristics

- Spain is a relatively stable and conservative market with a very high consumption of fresh fish, a wide variety of shellfish and salted cod.

Retail

- Consumers purchase products on a daily basis from some 6,000 small retail fish stores throughout the country.
- However, recent years have seen profound changes in consumption habits and Spaniards are quickly developing a taste for new products and species including more prepared and luxury seafood products. Much of this product appears in frozen form.
- In the past two years Spain has become the fastest growing market in Europe for frozen fish. This has been associated with increased female participation in the labour force and has resulted in increased market share by supermarkets.
- On a visit to the fish section of a modern spanish supermarket one might see the following, fresh whole fish, frozen fillets and pieces, a large variety of