

## Introduction

The Department of External Affairs lead a Fisheries mission to Spain October 24-26, 1988. Seven Canadian fish exporting companies along with David Shortall, Fisheries Division, External Affairs and Michael Crawcour, Canadian Embassy, Madrid participated in the mission. Mission members held meetings with some 60 Spanish fish importers in Madrid, Barcelona, San Sebastian, Vigo, Santandar and La Coruna. The group also visited the main wholesale fish markets in Madrid and Barcelona.

The purpose of the mission was to explore new opportunities for Canadian fish products following Spain's accession to the European Community in 1987 and to enable Canadian companies to benefit from improved access conditions as Spain's import regime becomes aligned with that of the Community. This process will be completed by 1992.

Spain is the European Community's largest consumer of fish products with per capita consumption of some 30 kilograms per capita in 1987. The wholesale value of fish and shellfish sales is approximately \$4 billion of which some \$1.5 billion are imports. Canadian exports to Spain reached a high of \$22 million in 1980. However, exports had virtually ceased after 1982 when Spain imposed an unofficial import ban on Canadian fish following the failure of Canada and Spain to agree on fish quotas for Spanish vessels in Canadian waters. The ban was lifted in 1986 and exports were recorded at \$1.2 million. By 1987 Canadian fish exports had grown to \$6 million.

At the present time Spain is not an easy market to access. Spain maintains the EC's largest fishing fleet which supplies a major portion of the country's requirements for groundfish and pelagics, the most important species consumed. Spain also imposes quotas and restrictive tariffs on certain fish imports although these will be modified or eliminated by 1992 to comply with the EC import regime.

Spain is a relatively stable and conservative market with a well established demand for specific products and product forms - salt cod, fresh seafood and unprocessed fish and shellfish. Spain is served by some 6,000 small retail fish stores where fresh fish is readily purchased on a daily basis. However, profound changes in consumption habits have occurred in recent years and Spaniards are rapidly adopting the more varied eating habits and taste preferences of their western European cousins. Spain has become Europe's fastest growing