

Mission: 407 Madrid

Market: 499 Spain

Key Subsector: 021 Fish & Shellfish and Other Products

The Spanish fisheries market is expected to import about \$1.5 billion in 1989 and Canada supplied only about half of one per cent of the market.

Specific Product Opportunities: Current Imports (\$CDN)

Wet salted cod, incl. fillets	\$64.80 M
Fresh and frozen Pacific salmon	\$20.20 M
Fresh and frozen cod, incl. fillets	\$10.60 M
Frozen fish blocks, various species	\$.00 M
Frozen shrimps	\$10.40 M
Live clams and gooseneck barnacles (British Columbia)	\$.00 M
Frozen Illex Squid	\$31.60 M
Canned Salmon (pink and sockeye)	\$.00 M
Live Lobster	\$2.40 M
Fresh and frozen monkfish (tails)	\$7.80 M
Frozen flounder, plaice and whiting	\$.00 M

The above products are imported directly, either through wholesalers or by the large processing companies located throughout Spain.

Comments on Above Products/Species

Wet Salted Cod

This is Canada's largest export to Spain amounting to \$3.8 million in 1987. Canadian salt cod is also believed to enter Spain through third countries, notably Portugal and France. Spain imports some \$75 million of salt cod annually. There is little demand for dried salted cod. The 1989 import quota is 17,500 tonnes. Major suppliers are Iceland, Faroe Islands, Norway and Canada. The market for salt cod is very competitive and Canadian salt cod tends to be purchased on a price basis. Preference is for hand split product.

Fresh and Frozen Pacific Salmon

Spain has the potential to become a major market for salmon. This has been due entirely to the introduction of farmed Atlantic salmon from Norway. Until quite recently, salmon was virtually unknown in Spain. The product is now found in the major wholesale markets. Imports of salmon and trout in 1987 were \$4.2 million.

Canadian exports of frozen salmon while modest, show positive trends. Canadian frozen salmon appeared in the Spanish market for the