Spanish Fish and Seafood Industry Sector Profile[1] - Madrid, Spain (January 2015)

1. The Fish and Seafood Sector in Spain

The Spanish fisheries and aquaculture sector is the EU’s biggest by a substantial margin. Whether in terms of fleet size (approximately 13,000 vessels), employment in the sector (41,500), catches (812,465 tonnes of fish), imports, farmed fish and shellfish production, or even consumption (43 kg per capita a year), Spain is typically among the top EU nations. Seafood products continue to be very important in the Spanish shopping cart, representing 11% of total household food expenses.

The fisheries sector in Spain is divided among the coastal autonomous communities (similar to Canadian provinces) bordering the Atlantic Ocean and the Mediterranean Sea off mainland Spain, as well as the Canary and the Balearic Islands. Galicia, in the northwest, has by far the biggest fleet (50%) and the most extensive fisheries sector in Spain, and is home to Vigo, the fisheries port with the highest amount of landings in Europe. Other autonomous communities with significant fleets are the Basque Country, Andalucía, Catalonia, and the Canary Islands.

As far as aquaculture is concerned, in 2013, the Spanish farming of marine fish and seafood amounted to approximately 253,000 tonnes from species including mussels, turbot, sea bass, sea bream and sole. In addition, the freshwater fish sector contributed approximately 10,000 tonnes: rainbow trout and small volumes of eel and sturgeons are key species. Molluscs, and in particularly mussels, are the largest category of the total Spanish farmed production, accounting for 210,000 tonnes. More than 95% of Spanish mussels’ production is carried out off the coast of Galicia, one of the largest seafood production sectors in the world. “Galician Mussels Protected Designation of Origin” is currently the only aquaculture geographical indicator in Spain.

Cooke Aquaculture Inc. of New Brunswick has made significant investments in Spain through the Culmarex Group, one of Spain’s leaders for breeding and raising sea bass and sea bream. With these investments, Cooke’s fish-packing plant has become the largest for sea bass and sea bream in the Mediterranean region.
Regarding processing, Spain is home to the largest fish processing industry in Europe, with a turnover of €3.9 billion in 2012. Historically, it was focused on salted and canned fish and shellfish. However, since the 1950s, processing has diversified significantly and has become export oriented. The industry is mainly composed of medium-sized companies mostly in the canning sector and to a lesser extent in frozen and fresh processed seafood. The canning sector has a production volume of 348,000 tonnes valued at nearly €2 billion. Tuna is the most important species in the national fish canning sector, amounting to 241,500 tonnes, while other key species include sardines and anchovies. The industry has responded to trends in demand, has reduced its dependence on the local market in favour of international customers in Europe and beyond, as well as improved the quality of semi-processed products. In addition, it has made an effort to develop new products and sustainable packaging. These measures have contributed to the increase in turnover within the sector even during the recent years of the crisis in contrast to other parts of the Spanish economy.

### 2. Fish and Seafood Trade

Considering the large capacity of the Spanish fish and seafood market, Spain relies heavily on imports to cover its consumption needs (predominately from developing countries). The country is also an important exporter, mainly to the EU, which acquires approximately two thirds of Spanish exports. In 2013, Spain imported 1.5 million tonnes of seafood, valued at around €5 billion. During the economic crisis, both imports (-1.3% in volume / -2.9% in value) and exports (-2.6% in value and -4.5% in volume) decreased. In 2013, the EU supplied Spain with 411,000 tonnes of fish and seafood products. The EU received 620,000 tonnes of the Spanish fisheries and aquaculture products.

**Spanish imports** are predominantly composed of **crustaceans, molluscs and cephalopods**. These made up 40% of the value of total fisheries and seafood imports. In 2013, crustacean imports increased slightly (1.6%), while mollusc and cephalopod imports decreased remarkably (-15.9%).

In terms of distribution, seafood is sold predominantly in supermarkets/hypermarkets (54.9%), independent retailers (29%), convenience stores (5.9%), specialist retailers (5.2%) and others (5%). Public markets such as Mercamadrid (Madrid) and MercaBarna (Barcelona), still control about 50% of the distribution and sell to most hypermarkets/supermarkets and to smaller fish markets.

### 3. Business Opportunities for Canadian Industry

Based on Canadian export data, Spain was the 22nd largest recipient of Canadian fish and seafood exports in 2013, valued at CAD$ 11.8 million. This means that Spain received around 0.27% of Canadian fish and Seafood exports in 2013. During the economic crisis, Canadian exports dropped in 2010-2012 and started to increase again in 2013. Following estimated real GDP growth of 1.1% this year, and annual growth of 1.7% in 2015-19, there are business opportunities for Canadian companies,
as Spain remains the largest per capita fish and seafood consumer among the member countries of the European Union.

### Canadian Fish and Seafood Exports to Spain in Millions of Current Canadian Dollars

<table>
<thead>
<tr>
<th>Year</th>
<th>2009</th>
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<th>2011</th>
<th>2012</th>
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<td>12.7</td>
<td>13.5</td>
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</tbody>
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Spaniards eat fish and seafood on a regular basis, often several times a week, and many traditional and celebratory dishes include fish ingredients. Furthermore, the country's annual influx of more than 60 million tourists makes for a thriving foodservice industry.

With the Canada-EU Comprehensive Economic and Trade Agreement (CETA) on the horizon, Canadian exporters will enjoy preferential access to the Spanish/EU market. Most barriers between the two economies will be eliminated or reduced, creating new opportunities and advantages on both sides.

**Fish and Seafood Tariff Elimination in the EU:**

- Fish and seafood: 95.5% of tariff lines duty-free immediately at entry into force
- 95.5% of tariff lines at 0% at entry into force
  - Immediate tariff elimination includes:
    - live lobster: current duties at 8%
    - frozen lobster: current duties from 6% and 16%
    - frozen scallops: current duties at 8%
    - frozen shrimp: current duties at 12%
    - cooked and peeled shrimp in retail packages: current duties from a rate of 20%
    - fresh or chilled hake: current duties at 15%
    - dried and salted cod: current duties at 13%
    - frozen herring: current duties at 15%
    - frozen mackerel: current duties at 20%
    - fresh or chilled halibut: current duties at 15%
    - salmon: from rates of up to 15%
    - processed salmon: current duties at 5.5%
    - snow crab: from rates up to 8%
    - fresh, chilled and frozen mussels: from rates up to 20%
    - dogfish: from a rate of 6%
  - Duty-free transitional TRQs with no end-use requirements for:
    - processed shrimp (two tariff lines): 23,000 tonnes: current duties at 20%
    - frozen fillets of cod (one tariff line): 1,000 tonnes: current duties at 7.5%
- Favourable rules of origin under which the majority of Canadian fish and
seafood products will qualify for preferential treatment

- Derogations for key products processed in Canada that use imported inputs, including:
  - prepared or preserved salmon: 3,000 tonnes
  - cooked and frozen lobster: 2,000 tonnes
  - prepared and preserved sardines: 200 tonnes
  - processed shrimp: 5,000 tonnes

- 100% of tariff lines will be duty-free seven years after entry into force


This agreement ultimately presents excellent opportunities for Canadian fish & seafood exporters looking to enter the lucrative Spanish marketplace.

### 4. Challenges and Certification

Success in introducing your product to the Spanish market depends on acquiring local representation and making personal contact. The advantages of local representation include market knowledge, up-to-date information and guidance on business practices and trade laws, sales contacts, and market development expertise.

Spain has a number of sales channels ranging from traditional distribution methods, in which wholesalers sell to small shops that sell to the public, to large multinational supermarkets and retail stores. However, personal relationships are still very important, especially within smaller organizations. There is no substitute for face-to-face meetings with Spanish business representatives in order to break into this market. A representative in Spain will likely know the different consumption patterns and preferences in each of the country’s 17 autonomous communities.

The European Union establishes the rules and regulations governing acceptable sanitary, phytosanitary, general trade, and labeling in Spain. As a result, Canadian exporters, already exporting to other EU countries, more than likely already know and can meet most of the requirements for exporting to Spain.

For Canadian exporters who have never exported to the EU it is important to get familiarized with the EU’s requirements including labeling and packaging and tolerances/guidelines, among others. For a detailed list of requirements please visit: [http://www.inspection.gc.ca/food/fish-and-seafood/exports/by-jurisdiction/european-union/certification-requirements/eng/1308322862954/1308323053859](http://www.inspection.gc.ca/food/fish-and-seafood/exports/by-jurisdiction/european-union/certification-requirements/eng/1308322862954/1308323053859)

### 5. Canadian Contacts

Mr. Máximo Hurtado  
Trade Commissioner, Agriculture and Processed Foods  
The Embassy of Canada to Spain
For information about international markets, you can also consult the Agri-Food Trade Service of Agriculture and Agri-Food Canada (AAFC): ats-<br>sea.agr.gc.ca/general/home-e.htm<br>The AAFC Agri-Food Trade Service provides centralized access to market information, trade counseling and support for export activities.

6. Fisheries and Seafood Trade Fairs in Spain, 2015

**Conxemar 2015** - [www.conxemar.com](http://www.conxemar.com)<br>Vigo, Spain<br>October 6-8, 2015

Conxemar is an international frozen seafood products Exhibition which takes place annually in Vigo, an important fishing port in Europe, and serves as the meeting point for buyers and suppliers active in the following areas: wholesalers, importers, exporters, transformers manufacturers, distributors, refrigeration equipment, machinery, auxiliary industry (cooling, packaging, plastics, etc.). Since its inauguration in 1999, it has grown steadily in visitors and exhibitors, with an exhibition area of 31500 m². Conxemar is almost three times the size of Seafood Southern Europe (520 exhibitors). It welcomed over 26,000 visitors from 94 countries in 2014. If you are going to commit to one show in Spain, this is the one.


Launched in 2012, Seafood Expo Southern Europe (formerly Seafood Barcelona), is a three-day seafood specific trade event. More than 3,000 buyers, suppliers, media, and other seafood professionals from over 75 countries visit the exposition. The trade fair is also attended by more than 160 exhibitors and it is planning to grow in the coming years. The trade fair brings together buyers and suppliers of all seafood categories: live, fresh, frozen, value added, processed and packaged seafood, as well as processing and packaging equipment.


*Alimentaria* is the most important International Food and Drink Exhibition in Spain and it is ranked among the best in the world. The must-attend event features recent innovation, the latest trends and internationalisation. Companies and institutions from over 50 countries participated in the 2014 edition, making Alimentaria a leading international event.

In 2014, Alimentaria was divided into 14 specialized product group shows with the
latest in each sector including: wines, meat, oils, restaurants, beverages, sweets, organic products, preserves, frozen foods, fish and seafood, among others. Splitting the fair into 14 shows made the event practical and effective for visitors. In addition, this year Expoconser (specialized group showcasing: preserved, semi-preserved, smoked, salted, marinated and pre-cooked food) was combined with Interpesca (specialized group showcasing: products from the sea, aquaculture and fish farming) for further convenience.

7. Sector Associations

**Spanish Federation of Associations of Fishery and Aquaculture Products Processing and Marketing Industries (FEICOPESCA)**
Apartado 258
36200 Vigo, Spain
Tel.: +34 986 46.93.30 - Fax: +34 986 46.92.69
Email: [anfaco@anfaco.es](mailto:anfaco@anfaco.es)
URL: [www.anfaco.es/](http://www.anfaco.es/)

**Spanish Association of Sea Fish Farmers**
Apdo. Postal 266 - Crta. del Marquesado Km. 3,400
11130 Chiclana de la Frontera (Cádiz)
Tel: 956 40.42.16 Fax: 956 40.33.88
E-mail: [info@apromar.com](mailto:info@apromar.com)
URL: [www.apromar.es](http://www.apromar.es)

**Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of Fish Products and Fish Farming (Conxemar)**
Avda. Beiramar, 29
36202 Vigo, Spain
Tel.: +34 986 43.33.51 - Fax: +34 986 22.11.74
Email: [conxemar@conxemar.com](mailto:conxemar@conxemar.com)
URL: [www.conxemar.com](http://www.conxemar.com)

[1] The Government of Canada has prepared this report based on primary and secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information.

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