

Spain's Fish Market a Catch For U.S. Exporters

By Magdalena Escudero

In 2001, only half of the 2 million metric tons of seafood consumed in Spain were caught by the Spanish fishing fleet, largely due to past overfishing. Compounding Spain's fish shortfall was Morocco's refusal to renew an agreement allowing Spanish fishing boats to fish in its waters. Imported and aquaculture products stepped into the breach left by the domestic ocean shortfall. Spanish importers must supply the remainder.

The largest seafood exporters to Spain include Argentina, Morocco and France. With only a 2-percent share of the import market, the United States still exported almost 26,600 tons of seafood to Spain in 2001, valued at \$71 million, up 10 percent



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Fish 'n' Facts

- Spain's per capita consumption of seafood weighs in at 31.3 kilograms, more than double that of Europe's 15-kilogram average.
- In 2001, Spain's largest fresh food distributor, MERCAMadrid, sold over 160,000 tons of seafood products worth \$806.4 million—105,510 tons were fresh fish; 18,388 were fresh shellfish; 36,177 were frozen product.
- Seafood accounts for 14 percent of the average Spanish consumer's food budget.
- Three-fourths of seafood is eaten at home.
- Pricey hake is the most popular species.
- In 2000, Spanish aquaculture firms produced over 45,000 tons of finfish and 242,000 tons of shellfish, primarily mussels.

Most Popular Products

Whether fresh or frozen, these species are preferred:

- Hake, whiting
- Shrimp
- Sardines, anchovies
- Salmon, trout
- Octopus, squid
- Tuna, cod
- Flat fish

from 2000. During 2001, the United States was Spain's main supplier for frozen long-finned tuna, surimi and lobster.

Spain Loves Seafood

Spain's long tradition of seafood consumption means consumers are very knowledgeable and selective when it comes to eating fish. Freshly caught seafood is still the food of choice in Andalusia, Madrid, the Basque country, Galicia, Asturias and Catalonia.

However, there have been some shifts in demand patterns. In 2001, overall frozen seafood sales increased a healthy 5 percent. Demand for smoked and canned seafood was also up, with per capita consumption at 4 kilograms. Fresh finfish consumption decreased by 2 percent, while demand for fresh shellfish grew by 3 percent during this same timeframe.

Home Cooks Serve Up Most Seafood

	At Home (percent)	Hotel, Restaurant, Institutional (percent)
Fresh fish	79.2	20.8
Fresh shellfish	77.8	22.2
Frozen seafood	35	65
Canned seafood	81	19
Smoked fish	45	55
Total	74.8	25.2

U.S. SALES TO SPAIN SHOULD GO UP AS DOMESTIC SUPPLIES DIMINISH.

Seafood Retail Leaders: Fresh? Fishmonger; Frozen or Canned? Supermarket

	Traditional fishmonger (percent)	Supermarket (percent)	Hypermarket (percent)
Fresh	49.4	38.9	11.7
Frozen	24.8	50.8	24.4
Canned	12.6	58	29.4
Total	40.4	43.7	15.9

In 2001, surimi and shellfish represented 45 percent of the total frozen seafood sales, followed by fish with 23 percent. The remaining frozen products included prepared fish, fish sticks and other ready-to-eat products.

Frozen products are purchased by 85

percent of Spanish families, though those with children purchase them more often. Regions with greater demand for frozen seafood include Valencia, Murcia, Castilla-LaMancha, Catalonia and Aragon. Canned seafood is popular in the Canary Islands, Murcia, Asturias and large cities.



From Docks to Plates

When fish is unloaded at the docks, it is sold to authorized wholesalers. Most seafood (along with other fresh food products) is marketed and distributed in Spain through the state-owned MERCA (market) food distribution network, where retailers and restaurants purchase the products.

For cities without a MERCA outlet, wholesalers distribute seafood through central city markets.

With the euro getting stronger, it is expected that demand for U.S. products will increase for 2002-03 because they will be more affordable. Though the United States ranks No. 15 among countries supplying seafood to Spain, U.S. sales increased, in tonnage, almost 10 percent from 2000 to 2001. ■

The author is an agricultural marketing specialist with the FAS Office of Agricultural Affairs at the U.S. Embassy, Madrid, Spain. Tel.: (011-34-91) 564-5275; Fax: (011-34-91) 564-9644; E-mail: AgMadrid@bitmailer.net



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