Voluntary Report – Voluntary - Public Distribution **Date:** April 06, 2023

Report Number: SP2023-0013

Report Name: Spain Seafood Report 2023

Country: Spain

Post: Madrid

Report Category: Fishery Products

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Report Highlights:

Spain is one of the largest markets worldwide for fish and seafood. In 2022, Spain was the fourth largest importer of fish and seafood in the world after the United States, China, and Japan. It not only has the largest fish processing industry in Europe, but also has a high per capita consumption and a high per capita expenditure on fish and seafood products. However, Spanish fish and seafood production through commercial fishing and aquaculture is not sufficient to meet domestic demand and imports remain a key element in meeting market demand. Top sellers from the United States in 2022 included surimi, squid, hake, Alaska pollock, and lobster.

SECTION I: SPAIN SEAFOOD MARKET OVERVIEW

Spain is a net importer of fish and seafood and sources these products from almost one hundred countries around the world. In 2022, Spain's imports of seafood products from all origins were $9.6 billion, up 7.6 percent from 2021. The largest seafood supplying country in 2022 was Morocco with $975 million, followed by Ecuador ($781 million), and Sweden ($678 million). The United States was the 23rd largest origin of seafood products to Spain with a value of $95 million, up 16 percent compared to the previous year. Imports originating from other European Union (EU) Member States ($3.4 billion) accounted for 35 percent of Spain's total fish and seafood imports in 2021.

Total Spanish exports in 2022 reached $5.9 billion, up 3.4 percent compared to the previous year. Imports are expected to continue to outpace exports, ensuring that Spain remains an important market for all U.S. seafood suppliers.

According to the EUMOFA EU Fish Market Report, in 2021, household expenditure on fishery and aquaculture products in the EU-27 grew 7 percent from 2020, continuing the upward trend already registered between 2019 and 2020. The increased expenditure from 2020 to 2021 was much higher than the 1.5 percent inflation of prices for fishery and aquaculture products observed in the same period. This suggests that the expenditure increase was not just a result of inflation, and that EU households had indeed spent more money for fishery and aquaculture products. The main reason can be traced to the lasting effects of the COVID-19 pandemic, which led to an increase in at-home consumption. Sales of processed fish through food services started to recover in 2021, increasing by 15 percent from 2020.

Spain is the second largest fish and seafood consumer in the EU, with 44.21 kg per capita apparent consumption per year, behind Portugal where the consumption per capita reaches 57.67 kg/year. Fish and seafood hold a significant place in the traditional diet and are viewed as a healthy and nutritious habit. Fish is consumed in all the possible ways: fresh, frozen, processed, in brine, even raw due to the fashionable Japanese influence. All these factors put together create interesting opportunities for U.S. exporters of all kinds.

SECTION II: SUPPLY, DEMAND AND MARKET OPPORTUNITIES

Spain, with almost 8,000 km of coastline and a long marine tradition, is home to one of the most important fishing industries in the EU. Its privileged geographical position in the south-west corner of Europe, at a maritime crossroads between the Atlantic Ocean and the Mediterranean Sea, offers ideal conditions for marine and freshwater aquaculture. Spain has a long history of marine traditions and is the largest EU fishery producer by volume and the largest consumer market for fisheries and aquaculture products.

In 2021, the Spanish fishing fleet was made up of around 8,730 vessels, the third largest in the EU. In the last eight years, the number of vessels has been reduced by 9 percent. Galicia represents 49 percent of all vessels followed by Andalusia (16.3 percent), the Canary Islands (8.6 percent) and Catalonia (7.4 percent). In terms of value, the most important fish species are tuna, albacore, and needlefish followed by coastal fish, cod, hake, herring, sardines, and anchovies. Regarding crustaceans and mollusks, the most relevant species are prawns, shrimp, squid, cuttlefish, and octopus.

Processing Industry

In Spain, the fishery and aquaculture product manufacturing industry has a great socio-economic importance, especially in areas highly dependent on fisheries, such as Galicia, Cantabria and the Basque Country. In these and other regions, there has been an important development in industrial activity of fishery products that positioned Spain to lead production in the European Union. Spain is the second largest producer of canned fish and seafood in the world and the largest in the EU in the frozen fish sector.

The sector is comprised of large, branded companies with a high degree of specialization, automation, and integration. The industry prides itself on its focus on innovation in food quality and safety, development of new products, and increased productivity.

Consumption

Spain is the second largest fish and seafood consumer in the EU, with 44.21 kg per capita apparent consumption per year, only behind Portugal where the consumption per capita reaches 57.67 kg/year.

Despite Spain’s economic recovery and relatively good macroeconomic numbers, many consumers are limiting the consumption of more expensive products, such as seafood and crustaceans, both in the retail and foodservice channels. In fact, one third of Spanish households are reducing their consumption of fish and meat as a way of coping with record food inflation. Spanish consumers are also increasingly looking for cheaper canned and frozen products as a means of dealing with higher food prices.

Some socio-demographic and economic patterns continue to influence the domestic consumption of fish and seafood. Per capita consumption of fish in households with members over 65 years old is more than double the per capita consumption in homes with members under 50 years old. Doctors often advise elderly patients to limit the ingestion of red meat and substitute it for white fish, as fish is perceived as healthier. This number contrasts with 37 percent of younger people who admit to never eating fish. The lower purchasing power and new lifestyles (lack of time to cook and queue at the fishmongers, lack of knowledge of how to cook the product, etc.) are challenges facing fish consumption. Only sushi and salmon have managed to win over younger generations.

Consumers seek convenient packaged options in smaller formats. Convenience is a factor that weighs more and more among younger consumers, households with fewer members or those who have less time to cook. Fish and seafood in a tray is gaining space on the shelves of retail chains, whether such outlets also house a dedicated fish section with attended points of sale or only packaged fresh fish and sea food for self-service. Packaged ready-to-buy products attract consumers who are looking for small portions suitable for one or two people and wish to save time and avoid queues. The ease of preparation and the focus on sustainability will strengthen the preference for the new formats of packaged fish in Spain. The connection between convenience and added value is becoming key. This category of product is still a minority niche compared to the traditional fish market and it is closely linked to frozen and fresh fish operators that see this category as a diversification of its main activity. Its high potential in the short and medium term has motivated several purchase-sale operations in the sector, as well as numerous investment projects in new packaging technologies. An expansion of these efforts is increasingly linked to retailers’ strategy for their fishmonger sections.

This category includes clean filleted fish, clean and prepared seafood, substitutes such as surimi, cooked options such as octopus, prepared mussels, fish burgers, etc. All products are refrigerated and easy to prepare, with recipes and presentations that often only require a microwave. This product category offers the consumer easy and value-added solutions that, as a result of its growth and the projects underway, seems to be the future for a large number of companies and distribution chains.

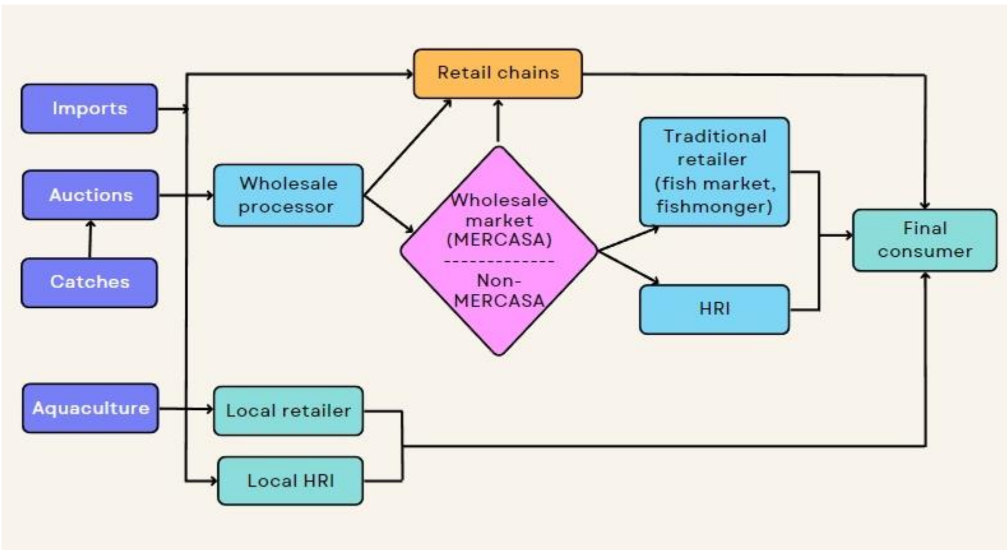
Two factors are likely to positively impact the total volume of sales in the medium term: the ageing of the Spanish population and the increasing importance of personal health and wellbeing. Increasing competition from packaged and prepared fish and seafood is expected to intensify, which will increasingly constrain volume sales. This is predominantly true for canned/preserved fish/seafood, due to its convenience and the popularity of special offers in supermarkets and hypermarkets.

Distribution

The wholesale distribution in Spain is mainly structured through the Mercasa network. Mercasa provides a public service to the whole food supply chain, especially in the wholesale fresh food industry, through the "*Mercas*," 24 wholesale markets across Spain, out of which 20 include a fish wholesale market. The most important fish wholesale markets are Mercamadrid and Mercabarna.

In the Spanish retail sector, fresh products, including fish, is the key to attracting customers. Large distribution is gaining more and more market share compared to the traditional channel, as major grocery chains offer quality at competitive prices. Logistical improvements and the removal of intermediaries, as well as improved distribution capacity to adapt to more geographic areas and a closer collaboration with the primary sector, are the pillars on which this greater competitiveness is based.

The fishery and aquaculture industry supplies fish and seafood to consumers through different sale channels: retail, which mostly includes fishmongers and large-scale retailers (LSR); foodservice, which includes catering, restaurants, and take-away sales; and institutional channels, which include schools, canteens, hospitals, and prisons.



Shortening the time between the production and the availability of the product in the store is the way to improve quality and reach customers with maximum freshness. The fresh fish and seafood sections require major distribution efforts, being the most perishable product and the most difficult to manage. At the same time, it is also the most strategic and differentiating category. Large grocery chains tend to have a presence in fish auction markets spread all over Spain and the purchase of supplies is carried out on a daily basis.

A good transport network is fundamental to guarantee the maximum freshness of the product.
Major grocery chains, particularly those ones inside supermarkets and hypermarkets, are renovating and expanding their over-the-counter fresh locally sourced fish sales areas, which has received a positive response from consumers.

Trade Shows

Seafood Expo Global
Dates: April 25-27, 2023
Location: Barcelona
Frequency: Annual
Conveniently located in Barcelona, Seafood Expo Global/Seafood Processing Global is the world's largest seafood trade fair. The fair features more than 2,000 exhibiting companies from 89 countries. This show offers professional seafood buyers a one-of-a-kind opportunity to meet and do business with seafood suppliers from every corner of the globe.

Conxemar
Dates: October 3-5, 2023
Location: Vigo, Pontevedra
Frequency: Annual
Every year, the Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of Fish products and Aquaculture (CONXEMAR) organizes its International Frozen Seafood Exhibition. It takes place in Vigo, an important fishing port in Europe and serves as the meeting point for the entire processing sector, distributors, importers, and exporters of frozen seafood products.

SECTION III: FISH AND SEAFOOD TRADE

Spain relies on imports, mainly from third countries, due to its high consumption numbers and the large capacity of the fish and seafood industry. At the same time the country is also a large exporter, mainly to the EU, which absorbs more than two-thirds of Spanish exports.

Imports

In 2022, Spain's seafood product imports from all origins were $9.6 billion. The main imported category was squid, followed by shrimp and prawns, tuna, and octopus. The largest single seafood supplying country was Morocco, being the main supplier of octopus and squid.

The main origin of Spanish seafood products imports in 2022 was the European Union. Within the EU, the main exporters of fish and seafood to Spain were Sweden, Portugal, and France. Outside the EU, the largest exporters were Morocco, Ecuador, and China.

Table 1. Spain Imports of Fish and Seafood by Origin ('000 USD)

Partner Country	2020	2021	2022
World	7,347,628	8,889,480	9,567,042
EU-27	2,676,111	3,189,069	3,373,412
Morocco	723,926	1,121,455	974,615
Ecuador	481,209	611,149	780,842
Sweden	462,957	599,299	677,654
Portugal	422,524	570,146	587,379
France	377,474	521,028	565,505
Netherlands	368,158	468,953	511,003
China	433,562	405,136	477,235

Source: [Trade Data Monitor LLC]

Table 2. Spain Imports of Fish and Seafood Products ('000 USD)

	2020		2021		2022	
Category	**World**	**U.S.A.**	**World**	**U.S.A.**	**World**	**U.S.A.**
Live Fish	59,113	0	55,275	0	94,956	0
Fish, fresh or chilled, excl. fillets	1,224,845	78	1,506,578	67	1,479,730	0
Fish, frozen, excl. fillets	802,310	8,940	805,180	2,917	828,164	5,043
Fish fillets and other fish meat, fresh, chilled or frozen	890,074	63,333	1,044,685	62,844	1,204,410	62,081
Fish, dried, salted, smoked or in brine	214,151	0	226,014	34	240,658	0
Crustaceans, live, fresh, chilled, frozen, dried	1,225,370	6,509	1,618,214	8,889	1,606,517	11,775
Mollusks, live, fresh, chilled, frozen, dried	1,709,064	7,207	2,321,018	6,852	2,507,360	15,076
Aquatic invertebrates other than crustaceans and mollusks	2,282	0	3,327	0	3,372	0

Source: [Trade Data Monitor LLC]

Spain imported $94.9 million of fish and seafood from the United States in 2022, 16 percent higher than previous year. In Spain, U.S. seafood is generally considered high quality but higher in price compared to that of competing countries. In 2022, the United States was the 23rd largest exporter of fish seafood to Spain. Frozen surimi ($28 million), squid ($14.6 million), hake ($14 million), and Alaska pollock ($12.4 million) were among the most imported categories in 2022.

Table 3. Spain Imports of Fish and Seafood Products from the United States (‘000 USD)

	Description	2020	2021	2022
	Total Seafood Products	**86,204**	**81,790**	**94,932**
030495	Surimi, frozen, nesoi	24,032	23,620	28,059
030743	Squid, frozen	6,363	5,878	14,645
030474	Hake fillets, frozen	11,802	13,569	14,035
030494	Alaska pollock, frozen, nesoi	18,698	18,008	12,401
030632	Lobster, live, fresh or chilled	4,161	8,348	11,683
030475	Alaska pollock, fish fillet, frozen	3,804	2,587	3,704
030499	Fish meat, frozen, nesoi	4,294	4,788	3,419
030312	pacific salmon frozen, nesoi	1,779	1,018	2,807
	Other	11,271	3,974	4,179

Source: Trade Data Monitor LLC

Exports

The top destination for Spanish fish and seafood in 2022 was the European Union, accounting for 76 percent of total exports. Within the EU, the main importers of Spanish fish and seafood were Italy, Portugal, and France. Outside the EU, the largest importer was the United States. In 2022, Spanish exports increased by 3 percent in relation to those in 2021. Exports to the United States increased almost 6 percent compared to previous year.

Table 4. Spain Exports of Fish and Seafood by Destination (‘000)

Country of origin	2020	2021	2022
World	**4,520,799**	**5,618,318**	**5,811,249**
EU-27	3,498,530	4,369,868	4,425,559
Italy	1,355,219	1,860,329	1,795,372
Portugal	775,909	924,924	976,026
France	683,750	805,302	817,598
United States	119,529	235,455	249,112
Germany	129,569	157,690	180,422
Netherlands	163,187	162,651	149,525
Other	1,293,636	1,471,967	1,643,194

Source: Trade Data Monitor LLC

Table 5. Spain Exports of Fish and Seafood Products (‘000 USD)

Category	2020	2021	2022
Live Fish	58,350	72,720	38,107
Fish, fresh or chilled, excl. fillets	481,111	617,313	677,752
Fish, frozen, excl. fillets	779,454	872,993	888,818
Fish fillets and other fish meat, fresh, chilled or frozen	433,617	565,244	700,645
Fish, dried, salted, smoked or in brine	124,582	153,251	123,847
Crustaceans, live, fresh, chilled, frozen, dried	399,999	580,029	538,692
Mollusks, live, fresh, chilled, frozen, dried	832,454	1,260,076	1,336,696
Aquatic invertebrates other than crustaceans and mollusks	7,020	12,260	13,478

Source: Trade Data Monitor LLC

SECTION IV: FISH AND SEAFOOD IMPORT REQUIREMENTS

As a general principle, seafood is only imported into the EU from approved countries and from approved establishments, e.g., processing plants, factory or freezing vessels, cold storages, or brokers. Aquaculture products, including live bivalve mollusks, may be exported from only approved establishments located within approved production zones or areas.

Since 2006, the U.S. Seafood Inspection System has been recognized by the EU as equivalent to the European Seafood Inspection System. This status does not apply yet to the export of live bivalve mollusks, in any form. This mutual recognition facilitates seafood trade between the United States and the EU. Furthermore, it creates a framework under which Member States cannot impose national requirements on U.S. seafood exporters in addition to EU harmonized legislation. However, differences of interpretation among Member States can lead to delays at border inspection posts.

For specific information on Spain, potential U.S. exporters can contact the Office of Agricultural Affairs in Madrid at AgMadrid@fas.usda.gov for additional sector-specific information.

Current Tariff for Seafood Products

The EU is a customs union which means that 27 Member State customs administrations implement the Union Customs Code. These common rules cover all aspects of trade with third countries. All the Member States apply the same tariff on goods imported from outside the EU. The import duty rate is determined by the classification of a good in the EU Tariff Schedule (last update published in Official Journal L 312 – Oct. 31, 2014) and by the customs value.

The Integrated Tariff of the European Communities, or TARIC, was introduced at the same time as the CN coding system. The codes used are a further breakdown of the CN codes to the 10-digit level. The TARIC contains information on tariff quotas, all third country and preferential duty rates, tariff suspensions and other trade measures. TARIC does not have the status of a legal instrument, but its 10-digit codes must be used in customs declarations. The EU’s online customs database can be consulted to look up commodity codes and relevant import duties. Agricultural, food and fishery products are listed under chapters 1 to 24.

Export Certification to the European Union

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Spain. Exporters should also check with Spanish importers regarding standards and labeling requirements.

The National Oceanic and Atmospheric Association (NOAA) oversees fisheries management in the United States. Under authority from the 1946 Agricultural Marketing Act, the NOAA Seafood Inspection Program provides inspection services for fish, shellfish, and fishery products to the industry. It is the competent authority within the U.S. Government for issuance of certain certificates required for export of fish and fishery products to the EU. Instructions and requirements are available for both export health certification and IUU catch documentation required for export to EU Member Countries.

For full details on how to export to the EU, please see: Exporting Seafood to the European Union – February 2022 Update

SECTION V: FURTHER INFORMATION AND KEY CONTACTS

If you have any questions, please contact the OAA in Madrid or consult our home page for more information on exporting U.S. food products to Spain. Importer lists are also available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below.

Spanish Trade Associations

- FIAB - Spanish Federation of Food and Beverage Industries
- CONXEMAR - Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of fish products and Aquaculture
- ANFACO-CECOPESCA – National Association of Manufacturers of Canned Fish and Shellfish
- CEPESCA – Spanish Fisheries Confederation

Spanish Government Regulatory Agencies

- Ministry of Health
- Spanish Food Safety and Nutrition Agency
- Ministry of Agriculture, Fisheries, and Food

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov

Attachments:

No Attachments.