United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** April 18, 2024

Report Number: SP2024-0004

Report Name: Spain Seafood Report 2024

Country: Spain

Post: Madrid

Report Category: Fishery Products

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Report Highlights:

Spain is one of the world's largest markets for fish and seafood. In 2023, 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 commercial fishing and aquaculture are insufficient to meet domestic demand for fish and seafood production and imports remain a key element in meeting that deficit. As such, Spain continues to create opportunities for U.S. fish and seafood. This report provides guidance to U.S. companies interested in exporting seafood products to Spain and includes an overview of the country's sector, market structure, and export requirements.

SECTION I: SPAIN SEAFOOD MARKET OVERVIEW

In Spain, the fishery and aquaculture product manufacturing industry have a great socio-economic importance, especially in areas highly dependent on fisheries, such as Galicia or the Basque Country. 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.

Spain is a net importer of fish and seafood and sources these products from more than one hundred countries around the world. In 2023, Spain's imports of seafood products from all origins were $9.2 billion, down 4.8 percent from 2022. The largest seafood supplying country in 2023 was Morocco with $1.1 billion, followed by Sweden ($720 million), and Ecuador ($685 million). The United States was the 20th largest origin of seafood products to Spain with a value of $98 million, down 5 percent compared to the previous year. Imports originating from other European Union (EU) Member States ($3.4 billion) accounted for 37 percent of Spain's total fish and seafood imports in 2022.

Total Spanish exports in 2023 were $6 billion, up 3 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.

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.

The Spanish fleet is one of the largest in the EU and fishes in the most fishing zones. In 2023, the Spanish fishing fleet was made up of 8,548 registered vessels, the third largest in the EU, although this represents a continuation of a downward trend for the 10th year in a row. In terms of value, in 2023, income from landings (total value of landings) was valued at $2.1 billion, 16 percent higher than previous year.

Consumption

Spain is the second largest per capita fish and seafood consumer in the EU, with 42.98 kg per capita apparent consumption per year, behind Portugal where the consumption per capita reaches 56.52 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.

According to the EUMOFA EU Fish Market Report, in 2022, household expenditure on fishery and aquaculture products in the EU-27 grew 11 percent from 2021, accelerating the upward trend that started in 2018. The escalating inflation had a significant impact on the prices of food, particularly of fish, causing their prices to rise by more than 10 percent from 2021 to 2022. As most of the EU supply of fish comes from imports, this growth was aligned with the increased prices of imported products. Inflation resulted in a significant decrease in at-home fish consumption, which saw volume drop nearly 17 percent in the highest consuming EU countries from 2021 to 2022. Further, this may have led to substitution effects, with consumers opting for cheaper animal protein products and reduced portion size, as well as cutting back on the frequency of purchasing meat and fish.

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 are challenges facing fish consumption. Only sushi and salmon have managed to win over younger generations.

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 food inflation. Spanish consumers are also increasingly looking for cheaper protein, as well as canned and frozen products as a means of dealing with higher food prices.

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 seafood 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.

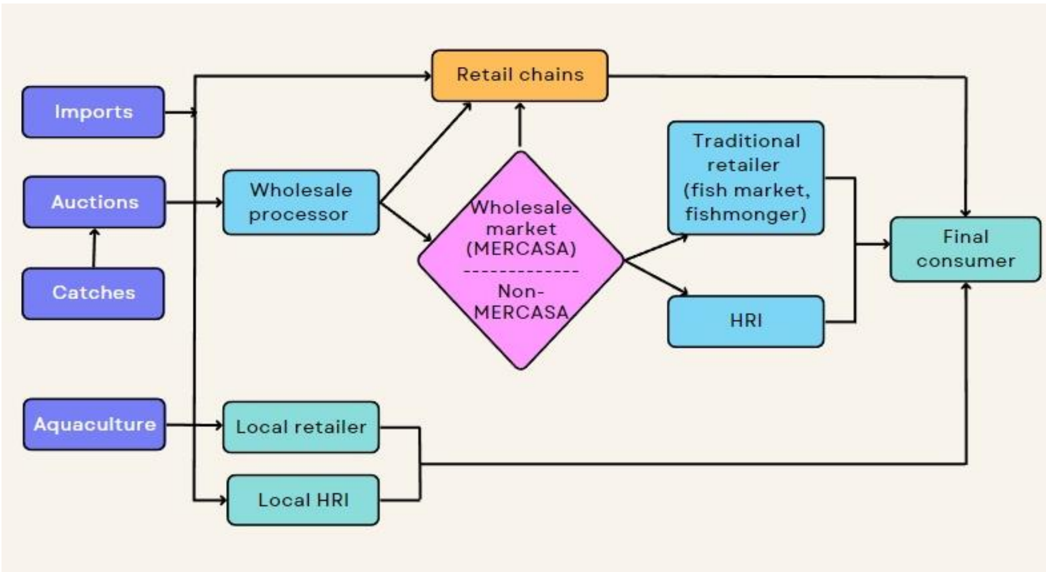
Distribution

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. Retail distribution is gaining more market share compared to traditional markets, 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.

Figure 1. Spain Distribution Structure



Efficient distribution networks are critical to guarantee maximum freshness for fish and seafood products. Major retailers are working to decrease the time between production and the products' arrival in stores, so large grocery chains are usually present in the fish auction markets across Spain to ensure that supplies are purchased daily. Supermarkets and hypermarkets are also renovating and expanding their over-the-counter fish and seafood sections as a strategic way to add value for the main retail chains.

Trade Shows

[Seafood Expo Global]
Dates: April 23-25, 2024
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 1-3, 2024
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.

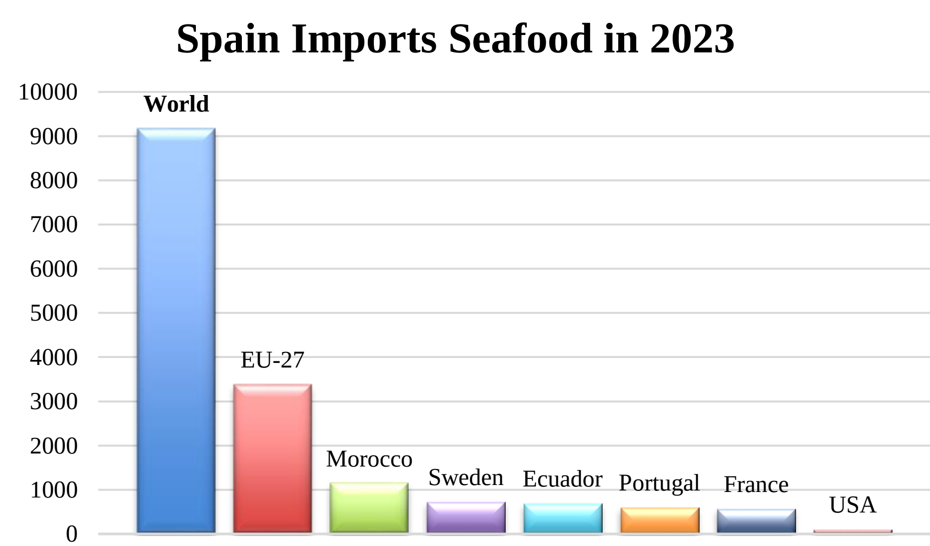
SECTION III: FISH AND SEAFOOD TRADE

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 2023, Spain's seafood product imports from all origins were $9.2 billion. The main imported category was squid, followed by shrimp and prawns, tuna, and octopus. The main origin of Spanish seafood products imports in 2023 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 Argentina. The largest single seafood supplying country was Morocco, being the main supplier of octopus and squid.

Figure 2. Spain Imports of Fish and Seafood by Origin in 2023 (Million USD)



Spain imported $98.5 million of fish and seafood from the United States in 2023, close to 4 percent higher than the previous year. In Spain, U.S. seafood is generally considered high quality but higher in price compared to that of competing countries. In 2023, the United States was the 20th largest exporter of fish seafood to Spain. Frozen surimi ($32 million), hake ($17 million), Alaska pollock ($14.8 million), and lobster ($11 million) were among the most imported categories.

Table 1. Spain Imports of Fish and Seafood Products from the United States (‘000 USD)

	Description	2021	2022	2023
	Total Seafood Products	**81,790**	**94,936**	**98,530**
030495	Surimi, frozen, nesoi	23,620	28,062	32,471
030474	Hake fillets, frozen	13,569	14,035	17,264
030632	Lobster, live, fresh or chilled	8,348	11,683	11,157
030494	Alaska pollock, frozen, nesoi	18,008	12,401	14,882
030743	Lulas and sépias, frozen	5,878	14,645	6,584
030475	Alaska pollock, fish fillet, frozen	2,587	3,704	3,866
030312	Pacific salmon frozen, nesoi	1,018	2,807	5,226
030771	Clams, cockles and ark shells, live, fresh or chilled	0	98	719
	Other	8,762	7,501	6,361

Source: Trade Data Monitor LLC

Exports

The top destination for Spanish fish and seafood in 2023 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 2023, Spanish exports increased by 3 percent in relation to those in 2022. Exports to the United States increased almost 13 percent compared to previous year.

Table 2. Spain Exports of Fish and Seafood by Destination (‘000)

Country of origin	2021	2022	2023
World	**5,618,318**	**5,805,815**	**5,988,890**
EU-27	4,357,365	4,412,435	4,595,086
Italy	1,860,329	1,795,609	1,843,841
Portugal	924,924	981,278	1,055,231
France	805,302	818,007	852,120
United States	235,455	249,270	282,543
Germany	157,690	178,328	178,219
Netherlands	162,651	149,756	128,418
Other	1,471,967	1,633,567	1,648,518

Source: Trade Data Monitor LLC

Table 3. Spain Exports of Fish and Seafood Products (‘000 USD)

	Description	2021	2022	2023
	Total Seafood Products	**5,618,318**	**5,805,815**	**5,988,890**
160414	Tunas, skipjack tuna and bonito	642,647	643,457	792,505
030743	Lulas and sépias, frozen	490,737	574,907	550,576
030752	Octopus, frozen	418,394	424,999	406,112
030617	Shrimps and prawns, frozen,	428,993	379,284	396,280
030343	Skipjack tuna	173,417	200,679	229,720
160420	Fish, prepared or preserved, nesoi	275,944	242,074	225,008
030366	Hake, frozen	162,747	151,047	169,291
160554	Cuttle fish and squid, prepared or preserved	104,599	110,831	121,667
	Other	2,920,840	3,078,537	3,097,731

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 check the FAIRS Annual Country Report outlines the legislation applicable to the export of U.S. food products to Spain, particularly focusing on those rules that differ from EU legislation. In addition, please contact the Office of Agricultural Affairs in Madrid at AgMadrid@fas.usda.gov for additional sector-specific information.

Current Tariffs 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.

All EU fish tariffs were consolidated under the Tokyo Round of GATT. The average EU duty for Chapters 3, 1604 and 1605 is 17.2%, one of the highest in the world. The tariff range is from 0% - live eels, to 25% - canned mackerel, bonito, and anchovies. The primary legislation covering tariffs is Commission Implementing Regulation 2021/1832. 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

The National Oceanic and Atmospheric Association (NOAA) Seafood Inspection Program is the competent authority within the U.S. Government for issuance of certain certificates required for export of fish and fishery products to the European Union (EU). The program offers four documents required for export to the European Union. They are:

- EU export health certificate
- Export Health - EU Bivalve Mollusk, Echinoderms, Tunicates, and Marine Gastropods
- Legal Harvest U.S. document for fisheries products harvested in the United States, to prevent, deter, and eliminate illegal, unregulated and unreported (IUU) fishing.
- The EU "Annex IV" Legal Harvest document for products harvested in a country other than the United States but being exported through the United States to the EU, to prevent, deter, and eliminate illegal, unregulated, and unreported (IUU) fishing.

Under EU regulations, an export health certificate is required as well as one of the two Legal Harvest documents. In addition, exporters should also check with Spanish importers regarding standards and labeling requirements.

For full details on how to export to the EU, please see: U.S. Commercial Service Guide for How to Export to the EU – March 2023 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.