

Voluntary Report – Voluntary - Public Distribution

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Report Highlights:

Spain is one of the world's largest markets for fish and seafood. In 2024, it was the fourth largest importer of fish and seafood in the world - after much larger countries like the United States, China, and Japan. Spain boasts the largest fish processing industry in Europe as well as a high per capita consumption and expenditure on fish and seafood products. However, Spanish commercial fishing and aquaculture are insufficient to meet domestic demand for seafood products, therefore imports continue to remain key for the Spanish market. 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 to help U.S. exporters navigate the challenges and opportunities in the Spanish market.

SECTION I: SPAIN SEAFOOD MARKET OVERVIEW

In Spain, the fishery and aquaculture product manufacturing industry have a large 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.

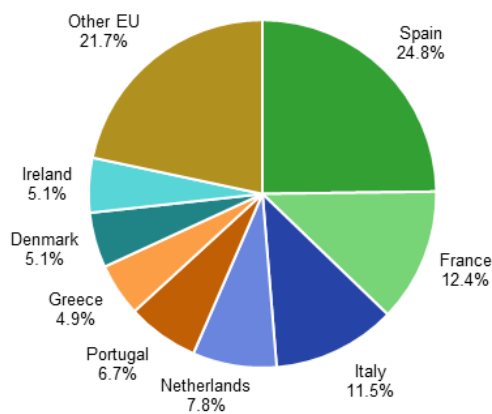
Spain is a net importer of fish and seafood and sources these products from more than one hundred countries around the world. In 2024, Spain’s imports of seafood products from all origins were \$9.5 billion, up almost 3 percent from previous year. The largest seafood supplying country in 2024 was Morocco with \$1.1 billion, followed by Ecuador (\$739 million) and Sweden (\$710 million). The United States was the 22nd largest origin of seafood products to Spain with a value of \$81.4 million, down 17 percent from the previous year. The European Union (EU) was Spain’s main import origin (\$3.4 billion), accounting for 36 percent of Spain’s total fish and seafood imports in 2023.

Total Spanish exports in 2024 were close to \$6 billion, virtually the same value as 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. With its long marine tradition, Spain is the largest EU fishery producer by volume and the largest consumer market for fisheries and aquaculture products.

Figure 1. Member State Share the EU’s Fishing Fleet 2023
(% share based on gross tonnage)



Source: Eurostat

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 when measured by gross tonnage, Spain has the largest fishing fleet among Member State countries by far (24.8 percent of the EU total). However, the fishing fleet continues to shrink - continuing a trend that started in the 1990s.

Consumption

According to “[The EU fish market report – 2024 Edition](#),” Spain is the second largest per capita fish and seafood consumer in the EU, only behind Portugal, with 41.92 kg per capita apparent consumption per year, 2 percent lower than the previous 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 possible ways: fresh, frozen, processed, in brine, even raw due to the fashionable Japanese influence. All these factors together create interesting opportunities for U.S. exporters.

According to Euromonitor, in 2023 and 2024, retail sales of fish and seafood continued to decline in volume terms due to inflation. A 2023 survey by [CEPESCA](#) (Spanish Fishing Confederation) highlighted concerns over the decreasing consumption of fish and seafood among teenagers and children. With the rising cost of living, some consumers switched to cheaper fish and seafood varieties, negatively impacting sales of premium options such as clams, crabs, and octopus, which are often seen as indulgent. Additionally, consumers increasingly seek convenient options, deterring them from purchasing crustaceans, mollusks, and cephalopods, which are more time-consuming to prepare.

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 with 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 increasingly more important.

Despite challenges in the retail channel in 2024, the foodservice sector grew in volume terms. Post-pandemic, fish and seafood consumption in restaurants and other foodservice outlets increased, driven by a notable influx of domestic and foreign tourists, with record visitor numbers in 2024. Additionally, changing consumer attitudes led to a preference for increased spending on experiences, such as dining out, with fish and seafood viewed as occasional treats rather than an everyday meal.

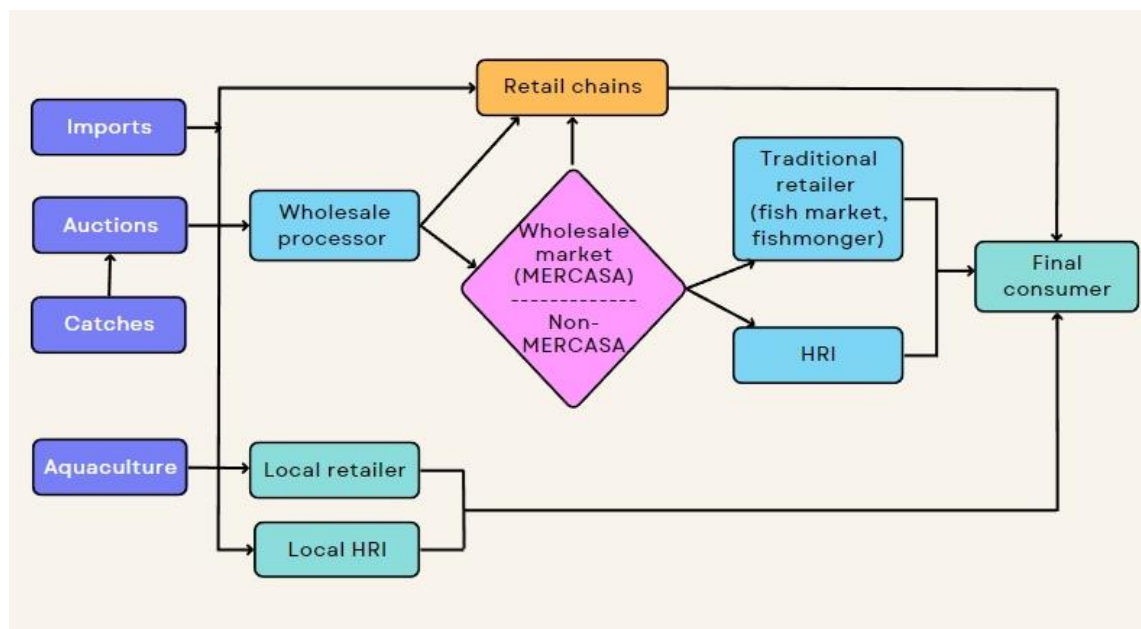
Distribution

The wholesale distribution network 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, are 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 sales 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 2. Spain Distribution Structure



Source: [EUMOFA](#)

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: May 6-8, 2025

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 87 countries. SEG 2024 was the largest-ever edition that brought together more than 35,000 seafood professionals. 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 7-9, 2025
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.

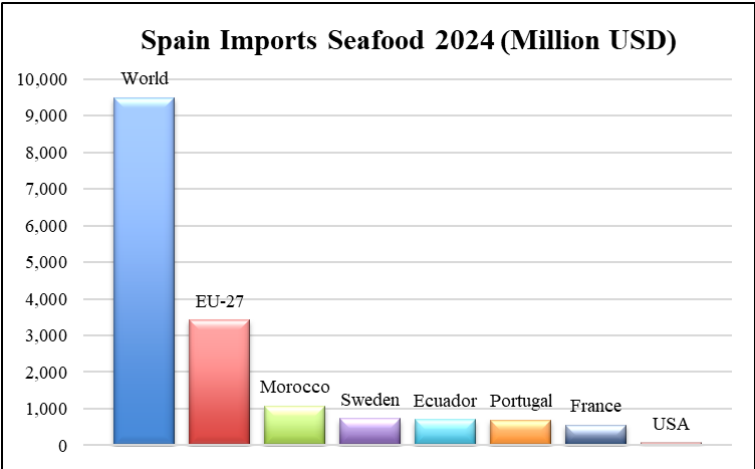
SECTION III: FISH AND SEAFOOD TRADE

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

Imports

In 2024, Spain’s seafood product imports from all origins were \$9.5 billion. The main imported category was squid, followed by shrimp and prawns, tuna, and octopus. The main origin of Spanish seafood products imports in 2024 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. The largest single seafood supplying country was Morocco, being the main supplier of octopus and squid.

Figure 3. Spain Imports of Fish and Seafood by Origin in 2024 (Million USD)



Source: [Trade Data Monitor LLC](#)

Spain imported \$81.4 million of fish and seafood from the United States in 2024, 17 percent less 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 2024, frozen surimi (\$20 million), hake (\$18 million), Alaska pollock (\$14 million), and lobster (\$11 million) were among the most imported categories.

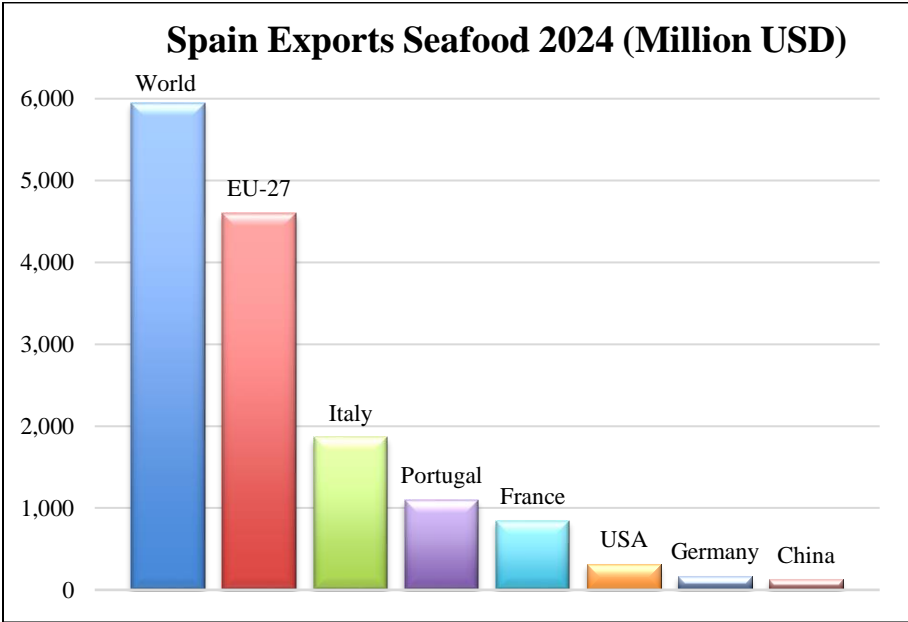
Table 1. Spain Imports of Fish and Seafood Products from the USA by Category (‘000 USD)

	Description	2022	2023	2024
	Total Seafood Products	94,936	98,532	81,412
030495	Surimi, frozen, nesoi	28,062	32,473	20,349
030474	Hake fillets, frozen	14,035	17,264	18,280
030494	Alaska pollock, frozen, nesoi	12,401	14,882	14,213
030632	Lobster, live, fresh or chilled	11,683	11,157	11,660
030743	Lulas and sépias, frozen	14,645	6,584	5,166
030475	Alaska pollock, fish fillet, frozen	3,704	3,866	2,822
030312	Pacific salmon frozen, nesoi	2,807	5,226	2,516
030771	Clams, cockles and ark shells, live, fresh or chilled	98	719	1,307
	Other	7,501	6,361	5,099

Source: [Trade Data Monitor LLC](#)

Exports

Figure 4. Spain Exports of Fish and Seafood by Destination



Source: [Trade Data Monitor LLC](#)

The top destination for Spanish fish and seafood in 2024 was the European Union, accounting for 77 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 2024, Spanish total exports to the world remained stable at \$5.95 billion. Exports to the United States increased almost 11 percent compared to the previous year.

Table 2. Spain Exports of Fish and Seafood Products by Category ('000 USD)

	Description	2022	2023	2024
	Total Seafood Products	5,805,815	5,991,019	5,947,695
160414	Tunas, skipjack tuna and bonito	643,457	789,787	843,012
030743	Lulas and sépias, frozen	574,907	549,457	538,256
030752	Octopus, frozen	424,999	409,473	410,465
030617	Shrimps and prawns, frozen,	379,284	396,633	380,692
160420	Fish, prepared or preserved, nesoi	242,074	224,787	215,237
030343	Skipjack tuna	200,679	227,906	195,683
030366	Hake, frozen	151,047	168,897	171,613
160554	Cuttle fish and squid, prepared or preserved	110,831	121,637	145,602
	Other	3,078,537	3,102,442	3,047,135

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 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. Spain, along with the Netherlands, are currently the only Member States eligible to export bivalve mollusks to the United States. Similarly, only two U.S. States (Washington and Massachusetts) appear on the list of countries authorized to export bivalve mollusks, echinoderms, tunicates, and marine gastropods to the EU.

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 Member States apply the same tariff on goods imported from outside the EU.

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. 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
- U.S. Legal Harvest document for fisheries products harvested in the United States, to prevent, deter, and eliminate illegal, unregulated and unreported (IUU) fishing.
- 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 2025 Update.

SECTION V: FURTHER INFORMATION AND KEY CONTACTS

If you have 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 Agriculture, Fisheries, and Food](#); [Spanish Food Safety and Nutrition Agency](#)

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.