Agriculture and Agri-Food Canada
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Canada

International Markets Bureau

MARKET INDICATOR REPORT | AUGUST 2012

Inside Spain

Seafood Trade

Growing Forward

Canada

TRADE SUMMARY

Spain is the third largest importer of fish and seafood in the world, importing US$7 billion in 2011, an increase of 9.4% from the previous year. The Spanish market is also very diverse, importing fish and seafood products from more than 121 countries in 2011. According to Mintel, Spain has the fifth-largest per capita expenditure on fish and seafood products in the world, at US$262 dollars annually. In comparison, average consumer expenditure on fish and seafood is around US$150 in Europe, and US$49 in the world as a whole.

The country mainly imports fish and seafood from Morocco, with 7.9% of total imports, followed by Argentina (6.9%), China (6.5%), Ecuador (5.5%), France (5.1%), and Portugal (4.8%).

Spain's main fish and seafood imports from all countries in 2011 included frozen shrimp and prawns in-shell (US$1.2 billion), cuttlefish and squid (US$629 million), frozen fish fillets (US$839 million), fresh fish with bones (US$572 million), prepared tuna/skipjack/bonito (US$436 million) and frozen or prepared mollusks (US$379 million).

In 2011, Spain exported just over US$3.8 billion in fish and seafood products worldwide, an increase of 20.5% from the previous year. Most of Spain's exports were comprised of prepared tuna/skipjack/bonito (US$506 million), frozen shrimp and prawns (US$258 million), frozen or prepared octopus (US$255 million), and cuttlefish and squid (US$242 million).

CANADIAN PERFORMANCE

Based on Canadian export data, Spain was the twentieth- largest recipient of Canadian fish and seafood exports in 2011, at US$14.3 million. Canadian exports to Spain increased in value by 11.9% from 2010.

In 2011, Spain received 0.3% of Canada's fish and seafood exports. Comparatively, the United States received 61.8%, China 9.1% and Japan 6.1%.

For Canada, fish and seafood represents the fourth-most significant agri-food export sector to Spain, behind other commodities such as cereal, vegetables, and miscellaneous grain seeds. Fish and seafood represented 6% of all Canadian agri-food exports to Spain in 2011.

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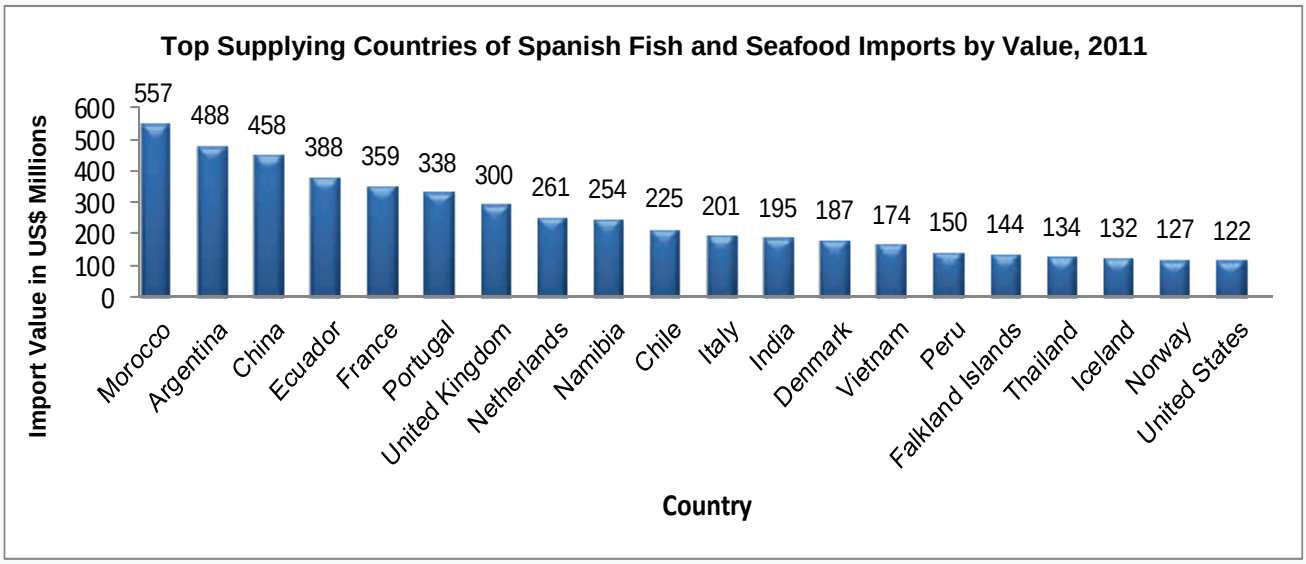
BY THE NUMBERS

Top 10 Countries Supplying Spain with Fish and Seafood (based on import data) and Top Imported Products in 2011

Rank	Country	Total Import Value in US$	Top Import Supplied	Top Import Value in US$
	World	7,034,064,482	Frozen shrimp and prawns	1,192,455,051
1	Morocco	557,281,068	Frozen, salted, dried octopus	161,812,055
2	Argentina	487,567,096	Frozen shrimp and prawns	341,213,840
3	China	457,748,187	Frozen shrimp and prawns	116,524,480
4	Ecuador	388,255,353	Frozen shrimp and prawns	190,679,331
5	France	359,118,109	Fresh or chilled fish with bone	104,888,121
6	Portugal	338,414,416	Fresh or chilled fish with bone	53,392,488
7	United Kingdom	300,235,246	Fresh or chilled fish with bone	50,972,971
8	Netherlands	261,282,236	Frozen or chilled fish fillets	33,679,750
9	Namibia	254,024,485	Frozen or chilled fish fillets	133,853,735
10	Chile	225,424,749	Prepared/preserved mollusks	88,049,930

Source: *Global Trade Atlas, 2012.*

Spain is an important market for Canadian fish and seafood exporters. Despite the effects of the economic downturn, it remains one of the largest food markets in Europe and has the potential for future growth as highly educated Spanish consumers are oriented towards high-quality products. Furthermore, due to immigration, the Spanish consumer market is becoming more diverse, which will further increase the demand for ethnic and foreign seafood.



Source: *Global Trade Atlas, 2012.*

▶ TOP TEN SEAFOOD SUPPLIERS TO SPAIN, 2011

1. Imports from Morocco		2. Imports from Argentina	
Frozen, salted, dried octopus	$161.8M	Frozen shrimp and prawns, in shell	$341.2M
Fresh, live, chilled cuttlefish and squid	$126.8M	Frozen, dried, salted mollusks	$57.9M
Frozen shrimp and prawns	$63.9M	Frozen fish fillets	$38.3M
Prepared/preserved fish	$44.1M	Frozen whiting and hake, with liver	$11.3M
Fresh or chilled fish, with bones	$42.0M	Anchovies, salted	$10.4M
3. Imports from China		**4. Imports from Ecuador**	
Frozen shrimp and prawns	$116.5M	Frozen shrimp and prawns	$190.7M
Frozen fish fillets	$111.8M	Prepared/preserved tuna/skipjack/bonito	$162.3M
Frozen, dried, salted mollusks	$76.6M	Prepared/preserved fish	$19.3M
Frozen cuttlefish and squid	$66.2M	Frozen fish fillets	$5.8M
Prepared/preserved tuna/skipjack/bonito	$17.2M	Frozen yellowfin tuna, except fillets	$3.9M
5. Imports from France		**6. Imports from Portugal**	
Fresh or chilled fish, with bones	$104.9M	Fresh or chilled fish, with bones	$53.4M
Fresh cuttlefish and squid	$27.0M	Frozen shrimp and prawns, in shell	$21.6M
Chilled sole, except fillets	$24.1M	Fresh live octopus	$20.3M
Frozen yellowfin tuna, except fillets	$22.7M	Frozen dogfish	$15.2M
Fresh or chilled flatfish	$19.7M	Frozen octopus	$14.3M
7. Imports from the United Kingdom		**8. Imports from the Netherlands**	
Fresh, chilled fish with bones	$51.0M	Frozen fish fillets	$33.7M
Prepared or preserved mollusks	$36.5M	Cod, salted or in brine	$24.9M
Cooked, steamed, boiled crustaceans	$33.3M	Fish fillets, salted or in brine	$24.6M
Flatfish, except fillets	$28.0M	Prepared or preserved mollusks	$23.6M
Live/cooked crab	$20.4M	Frozen shrimp and prawns	$19.5M
9. Imports from Namibia		**10. Imports from Chile**	
Frozen fish fillets	$133.9M	Prepared or preserved mollusks	$88.0M
Fresh or chilled fish, with bones	$22.9M	Fresh or chilled fish, with bones	$37.3M
Frozen fish meat, except steak	$19.4M	Frozen whiting and hake, except fillet	$31.4M
Frozen fish, with bones	$18.3M	Frozen, dried, salted mollusks	$19.9M
Frozen whiting and hake, except fillets	$130.0M	Frozen, dried, salted octopus	$11.6M

***Source**: Global Trade Atlas, 2012.*

MARKET SIZES

Spaniards eat fish and seafood on a regular basis, often several times a week, and many traditional and celebratory dishes, such as paella, include fish ingredients. Spain remains the largest per capita fish and seafood consumer among the member countries of the European Union, but preferences are changing. The consumption of fresh fish is declining in favour of frozen and processed fish products, which are gaining popularity due to their lower prices.

Fresh Fish and Seafood Retail Sales in Spain by Segment in Thousands of Tonnes, Historic/Forecast

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015
Fish	909.4	899.8	907.2	847.4	839.7	838.8	849.8	852.3	841.2
Mollusks and cephalopods	351.2	359.5	371.9	326.3	306.7	289.9	279.6	284.6	291.2
Crustaceans	206.1	202.4	208.2	180.8	178.8	170.1	164.8	167.9	172.0

Fresh Fish and Seafood Consumption in Spain per Capita in Kilograms, Historic/Forecast

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015
Fish	20.4	19.9	19.8	18.4	18.2	18.2	18.4	18.5	18.3
Mollusks and cephalopods	7.9	7.9	8.1	7.1	6.6	6.3	6.1	6.2	6.3
Crustaceans	4.6	4.5	4.5	3.9	3.9	3.7	3.6	3.6	3.7

Fresh Fish and Seafood Market Sizes in Spain % Volume Growth Forecasts

Category	Total 2012-2016	CAGR* 2012-2016
Fish	-0.5%	-0.1%
Mollusks and cephalopods	1.5%	0.4%
Crustaceans	1.6%	0.4%

***CAGR =** *compound annual growth rate*
***Source for all:** Euromonitor, 2012.*

***Source:** Shutterstock.*

Sales of fresh crustaceans declined by 1.1% in 2011. As well, consumption of mollusks and cephalopods decreased by 6.0%. This decline in performance is largely explained by pricing, with crustaceans and mollusks tending to be more expensive, as producers position these products in the premium category.

Consumption of farmed fish has seen a substantial increase in volume over the last several years in Spain with consumption of farmed turbot (a species of flatfish) exceeding 8,000 tonnes in 2010, and consumption of sea bass totalling 13,840 tonnes. The Canary Islands is the second most important production area for farmed fish and seafood in the region. However, the city of Murcia, located on Spain's southeast coast, made significant steps forward in sea bass production in 2010.

▶ MARKET SIZES (continued)

Chilled Fish and Seafood Retail Sales Value in Spain by Segment in US$ Millions, Historic/Forecast

Category	2009	2010	2011	2012	2013	2014
Coated fish/seafood	2,171	2,275	2,380	2,487	2,596	2,706
Raw seafood	1,826	1,867	1,907	1,945	1,982	2,018
Raw fish	1,355	1,408	1,460	1,513	1,566	1,619
Total	5,353	5,549	5,746	5,945	6,144	6,343
Growth over previous year	3.8%	3.7%	3.6%	3.5%	3.4%	3.2%

Coated fish and seafood was the leading chilled segment, accounting for a 41.4% share of Spain's total chilled fish and seafood market in 2011.

Frozen Fish and Seafood Retail Sales Value in Spain by Segment in US$ Millions, Historic/Forecast

Category	2009	2010	2011	2012	2013	2014
Raw fish	551	587	623	659	695	731
Coated fish/seafood	417	445	472	499	527	554
Raw seafood	282	301	319	338	356	375
Other fish/seafood	129	138	146	155	163	172
Total	1,380	1,470	1,561	1,651	1,741	1,832
Growth over previous year	7.0%	6.5%	6.1%	5.8%	5.5%	5.2%

Raw fish was the leading frozen segment, representing 39.9% of Spain's total frozen fish and seafood market in 2011.

Canned Fish and Seafood Retail Sales Value in Spain by Segment in US$ Millions, Historic/Forecast

Category	2009	2010	2011	2012	2013	2014
Tuna	1,180	1,221	1,262	1,303	1,343	1,383
Other Fish/Seafood	856	887	918	950	982	1,014
Mackerel	146	152	157	163	169	175
Total	2,182	2,259	2,337	2,416	2,494	2,573
Growth over previous year	3.6%	3.5%	3.4%	3.3%	3.2%	3.1%

Tuna was the leading canned segment, with half (54%) of the total 8canned fish and seafood market in 2011.

Source for all: *Datamonitor, 2012.*

DISTRIBUTION CHANNELS

Fish and Seafood Distribution Channel Shares in Spain by Value, 2010

Channel	% Share
Supermarkets / hypermarkets	54.9
Independent retailers	29.0
Convenience stores	5.9
Specialist retailers	5.2
Service stations	4.0
Department stores (incl. duty-free shops)	1.0

Source: *Datamonitor, 2012*

Fish and Seafood Company Market Shares in Spain by Volume, 2010

Company	% Share
Frinsa del Noroeste, S.A.	3.9
Conservas Garavilla, S.A.	3.3
Jealsa Rianxeira, S.A.	2.9
Luis Calvo Sanz, S.A.	2.8
Grupo Pescanova	1.9
Pescapuerta, S.A.	0.9
Grupo Freiremar	0.7
Hijos de Carlos Albo, S.L.	0.6
Salica, Industria Alimentaria, S.A.	0.6
Grupo Iberica de Congelados, S.A.	0.5
Grupo Amasua	0.5
Congelados y Frescos del Mar, S.A.	0.4
Distribución Mariscos Rodriguez, S.A.	0.4
Mascato, S.L.	0.4
Ignacio González Montes, S.A.	0.4
Conservas Dani, S.A.	0.4
Francisco Gil Comes, S.L.	0.4
Grupo Marfrio, S.A.	0.4
Grupo Banchio	0.3
Alfonso García López, S.A.	0.3
Others	78.3

Source: *Mintel, 2012*

Fish and Seafood Company Shares in Spain by Value, 2010

Company	% Share
Luis Calvo Sanz, S.A.	5.1
Frinsa del Noroeste, S.A.	3.5
Conservas Garavilla, S.A.	2.6
Jealsa Rianxeira, S.A.	2.4
Grupo Pescanova	1.6
Salica, Industria Alimentaria, S.A.	0.9
Hijos de Carlos Albo, S.L.	0.9
Pescapuerta, S.A.	0.7
Grupo Freiremar	0.6
Ignacio González Montes, S.A.	0.6
Conservas Dani, S.A.	0.5
Francisco Gil Comes, S.L.	0.5
Alfonso García López, S.A.	0.4
Grupo Marfrio, S.A.	0.4
Grupo Iberica de Congelados, S.A.	0.4
Mascato, S.L.	0.4
Grupo Amasua	0.3
Grupo Banchio	0.3
Congelados y Frescos del Mar, S.A.	0.3
Distribución Mariscos Rodriguez, S.A.	0.3
Others	77.3

Source: *Mintel, 2012*

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ISSN 1920-6615
AAFC No. **11779E**

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