Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

MARKET ACCESS SECRETARIAT
Global Analysis Report

Sector Trend Analysis

Crustaceans Trends

In Spain

June 2017

Executive summary

According to the Market Assessment of Opportunities and Challenges in the EU report, crustaceans in Spain have been identified as one of the most promising market opportunities in the European Union. Through a rigorous analysis of the market size, growth, and tariff reductions of the European Union (EU) imports, Spain represented an ideal opportunity for Canadian crustacean exporters.

In 2016, Spain was ranked the largest importer of crustaceans in the EU, making up 18% of the region's market share with imports worth US$1.5 billion, followed by France with 16% and the United Kingdom with 12% market share. Canada was ranked the sixteenth-largest supplier of crustaceans to Spain with imports worth US$24.1 million in 2016; whereas, Argentina, Ecuador, and the United Kingdom lead in exporting crustaceans and accounted for 46% of Spain's imports in 2016.

Spain's top imports from the world were shrimp and prawns worth US$1.2 billion, followed by lobster (worth US$192 million), and crab (worth US$58.7 million). The top imported products from Canada were lobster products worth US$24 million in 2016. Of all the crustacean subcategories, frozen crustacean products lead in imports.

From 2012 to 2016, Spain's imports of crustacean products saw a compound annual growth rate of 2.7%. Alternatively, total volume of domestic sales saw an annual 3.1% drop in the same review period. However, this trend is expected to change due to improved economic conditions combined with the strong healthy image of seafood and their embedded position in Spanish cuisine.

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Trade overview

Spain is the largest crustacean importer in the European Union (EU) and the fourth-largest in the world after the United States, Japan, and China. In 2016, Spain's crustacean imports amounted to US$1.5 billion, with 46.2% of its imports coming from Argentina (with a 24.3% market share), Ecuador (with a 15.8% market share), and the United Kingdom (with a 6.1% market share). Overall, Spain made up 5% of the world's imports and witnessed a compound annual growth rate of 4.1% from 2012 to 2016.

Spain continues to be a net importer of crustaceans with imports amounting to US$1.5 billion and exports of US$429.3 million in 2016. Most of Spain's export occurred within the European Union. 80% of Spain's export within the EU were to three Member States as follows: Italy (37%), Portugal (27%), and France (16%). Shrimp and prawns accounted for 85% of Spain's exports, followed by lobster (with 9% market share), other crustaceans (with 4% share), and crabs (with 2% share). Throughout the five-year review period, only shrimp/prawns and crabs saw a positive period growth rate with a compound annual growth rate of 9% and 16%.

World imports of crustaceans saw moderate growth with a compound annual growth rate of 2.7% from 2012 to 2016, worth US$28 billion in 2016. This was relevant for most of the top crustacean importers, where both the United States and China saw a compound annual growth rate of 5.5% and 16.9%. Whereas, Japan saw -5.6% compound annual growth rate.

Top ten crustacean markets in the world from 2012 to 2016, in US$ millions

Rank	Country	2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
World total		**25,230.1**	**27,191.0**	**30,947.1**	**27,042.0**	**28,020.4**	**2.7%**	
1	United States	7,252.5	8,200.8	9,974.8	8,753.8	8,986.1	5.5%	32%
2	Japan	4,177.8	3,834.6	3,678.6	3,087.0	3,320.5	-5.6%	12%
3	China	1,134.0	1,437.5	1,671.4	1,861.4	2,117.9	16.9%	8%
4	**Spain**	**1,251.1**	**1,341.5**	**1,524.8**	**1,409.4**	**1,467.5**	**4.1%**	**5%**
5	France	1,258.7	1,341.8	1,440.7	1,230.0	1,301.8	0.8%	5%
6	United Kingdom	879.4	945.1	1,123.6	1,043.0	997.7	3.2%	4%
7	South Korea	672.4	683.2	914.1	927.1	982.5	9.9%	4%
8	Canada	848.1	898.2	1,097.6	943.5	956.4	3.0%	3%
9	Italy	744.7	808.0	940.2	803.6	875.2	4.1%	3%
10	Hong Kong	879.1	858.6	795.6	686.0	721.6	-4.8%	3%

Source: Global Trade Tracker, 2017. *__CAGR__ - Compound annual growth rate
Note: Data is based on crustacean imports retrieved on March 17, 2017.

Canada's performance

Canada is the third-largest supplier of crustaceans in the world with export sales amounting to US$2.8 billion in 2016 and a compound annual growth of 6% (from 2012 to 2016). Canada continues to be a net exporter of crustacean products with a surplus of US$2 billion in crustacean trade.

Canada's top export market are the United States with export sales worth US$1.8 billion, China worth US$419 million, and Japan worth US$116.0 million. The top crustacean products exported to the world were frozen crabs worth US$719 million, frozen lobster worth US$658 million, and live, fresh, chilled, dried, salted lobster worth US$631, altogether making up 71% of Canada's exports.

Canada is the sixteenth-largest supplier of crustacean products to Spain, with Spanish imports from Canada amounting to US$24.1 million in 2016. From 2012 to 2016, Spain's crustacean imports from Canada grew at a compound annual growth rate of 26.7% and gained a 0.9% increase in market share (from 0.7% to %1.6%).

Spain's imports from its top ten suppliers in 2012 to 2016, in US$ millions

Rank	Country	2012	2013	2014	2015	2016	CAGR* 2012-15	Market share
Total imports		**1,251.10**	**1,341.50**	**1,524.77**	**1,409.44**	**1,467.53**	4.07%	
1	Argentina	270.61	315.54	339.02	342.63	356.97	7.17%	24.3%
2	Ecuador	168.27	179.19	234.64	209.83	232.09	8.37%	15.8%
3	United Kingdom	93.42	84.03	97.67	79.85	89.06	-1.19%	6.1%
4	China	101.37	93.50	88.13	105.13	81.72	-5.24%	5.6%
5	Morocco	47.55	56.83	73.92	68.71	74.58	11.91%	5.1%
6	Tunisia	29.42	46.52	45.03	48.11	50.83	14.65%	3.5%
7	Nicaragua	49.43	60.33	83.30	53.62	49.83	0.20%	3.4%
8	Portugal	28.81	29.50	33.86	31.05	48.49	13.90%	3.3%
9	Netherlands	45.69	44.02	50.71	38.25	44.68	-0.56%	3.0%
10	United States	40.03	39.61	40.51	36.13	36.61	-2.21%	2.5%
16	**Canada**	**9.35**	**9.63**	**14.54**	**18.21**	**24.08**	**26.67%**	**1.6%**

Canada's top ten crustacean products exported to the world in 2016, US$ millions

HS Code	Description	*2016*	Market share
Crustacean products		**2,844.08**	
030614	Frozen crabs	719.01	25.3%
030612	Frozen lobsters	658.01	23.1%
030622	Live, fresh, chilled, dried, salted lobsters	631.11	22.2%
160530	Prepared/preserved lobster	334.80	11.8%
030616	Frozen cold-water shrimps and prawns	282.06	9.9%
030624	Live, fresh, chilled, dried, salted crabs	107.07	3.8%
160521	Prepared/preserved shrimp and prawns	52.27	1.8%
160510	Prepared/preserved crabs	31.61	1.1%
030617	Frozen shrimp and prawns	14.50	0.5%
160529	Prepared/preserved prawns (in airtight containers)	5.21	0.2%

Source for both: Global Trade Tracker, 2017.
Note: Canada's crustacean exports retrieved on March 17, 2017.

Consumer trends

Crustaceans are traditional food items in the Spanish diet. It is one of the most popular seafood products consumed during the Christmas holidays, such as lobster, shrimp, and prawns. However, in the past few years, Spain experienced a decline in the consumption of fresh fish and seafood due to the economic crisis, high prices of seafood's and changing demand for more innovative, processed, and convenient fish and seafood products.

In addition to these factors, the consumption of fish and seafood items such as crustaceans is heavily dependent on the sociodemographic of a Spanish household. According to the public authority who regulates Spanish fisheries and fish distribution, the per capita consumption of fish and seafood in households with members over 65 years old was more than double than in households with no members over 50 years old. It was also observed that consumers with more resources are more likely to purchase crustaceans. For example, adult couples without kids were the ones consuming more seafood as well as adults living alone and retired. Furthermore, elderly consumers are advised by their doctors to eat fish and seafood at the expense of red meat (Euromonitor, 2016).

Total volume of crustacean consumption in Spain, from 2012 to 2016

Value Type	2012	2013	2014	2015	2016
kg per capita	3.90	3.80	3.60	3.60	3.50
kg per household	10.00	9.50	9.10	8.90	8.50

Source: Euromonitor, 2017.

Domestic sales

Total volume sales of fish and seafood witnessed a 2% decrease from 2015, decreasing to 1.2 million tonnes, a sixth consecutive year decline (Euromonitor, 2016). This was a consistent experience for the crustacean category, which witnessed a compound annual growth rate of - 3.1% from 2012 to 2016.

According to Euromonitor, the perception of economic recovery has encouraged Spanish consumers to choose value-added fish and seafood products. This trend towards innovative and convenient processed fish and seafood products is reducing the consumption of fresh fish and seafood products (Euromonitor, 2016).

In the forecast period, crustaceans are expected to see a moderate negative growth rate of -1%, a better performance than the historical period. According to Euromonitor, this is believed to be due to factors such as improving economic conditions, a strong healthy image of fish and seafood products, and their embedded position in Spanish cuisine. However, competition from packaged and prepared fish and seafood is likely to intensify, which will increasingly exert downward pressure on volume sales over the forecast period (Euromonitor, 2016).

Historic total volume sales in tonnes ('000) of fresh fish and seafoods in Spain from 2012 to 2016

Category	2012	2013	2014	2015	2016	CAGR* 2012-15	Market share
Fish and seafood	**1,299.80**	**1,261.90**	**1,215.70**	**1,195.90**	**1,171.40**	**-2.57%**	
Crustaceans	183.00	175.70	169.20	166.70	161.30	-3.11%	13.8%
Fish	824.30	802.90	770.00	760.00	747.70	-2.41%	63.8%
Molluscs	292.50	283.40	276.50	269.20	262.30	-2.69%	22.4%

***CAGR** - Compound annual growth rate

Forecast total volume sales in tonnes ('000) of fresh fish and seafoods in Spain from 2017 to 2021

Category	2017	2018	2019	2020	2021	CAGR* 2012-21	Market share
Fish and seafood	**1,155.40**	**1,155.00**	**1,158.90**	**1,169.00**	**1,155.50**	**0.00%**	
Crustaceans	158.20	156.60	153.40	153.30	152.40	-0.93%	13.2%
Fish	739.20	745.50	755.40	766.40	754.40	0.51%	65.3%
Molluscs	258.00	252.90	250.10	249.20	248.80	-0.90%	21.5%

Source for both: Euromonitor, 2017. ***CAGR** – Compound annual growth rate

Trade analysis by category

- Spain's top import category of crustaceans was shrimp and prawns which accounted for 81% of its imports, followed by lobster with 13.1% market share.
- Crabs and other crustaceans made up 5.9% of Spain's crustacean imports.
- Shrimp and prawns continue to be a popular crustacean category, with a high period growth of 5% from 2012 to 2016. Whereas, other crustaceans category witness a negative period growth of 2.6% and only holds a 1.9% market share.
- Most of Spain crustacean imports from Canada were lobster products which made up 98% of their total crustacean imports from Canada.
- Under the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), there will be a full elimination of EU tariffs on crustacean products originating from Canada. Most of the EU tariffs will eliminated immediately upon CETA implementation, and all remaining EU tariffs on fish and seafood will be eliminated gradually within 3, 5, or 7 years. See the chapter-by -chapter guide to the key provisions of the Agreement.

Spain's imports of crustacean products from the world from 2012 to 2016, in US$ millions

Category	2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total	**1,251.1**	**1,341.5**	**1,524.8**	**1,409.4**	**1,467.5**	**4.07%**	
Shrimp and prawns	979.6	1,092.9	1,247.5	1,156.8	1,188.27	4.94%	81.0%
Lobster	183.4	164.2	181.1	171.6	191.95	1.14%	13.1%
Crabs	56.3	53.8	66.7	57.0	58.69	1.05%	4.0%
Other crustaceans	31.7	30.6	29.4	24.0	28.61	-2.56%	1.9%

CAGR- Compound Annual Growth Rate

Spain's imports of crustacean products from Canada from 2012 to 2016, in US$ millions

Category	2012	2013	2014	2015	2016	CAGR* 2012-15	Market share
Total	**9.35**	**9.63**	**14.54**	**18.21**	**24.08**	**26.7%**	
Lobster	9.35	9.55	14.05	17.63	23.69	26.2%	98.4%
Shrimp and prawns	0.00	0.01	0.35	0.38	0.38	N/C	1.6%
Crabs	0.00	0.00	0.15	0.20	0.00	N/C	0.0%
Other crustaceans	N/A	N/A	N/A	N/A	N/A	N/C	0.0%

Source for both: Global Trade Tracker N/A – Data not available N/C – Not calculable **CAGR**- Compound Annual Growth Rate
Note: Spain's import data retrieved on March 1, 2017.

Shrimp and prawns

- Spain is the third-largest importer of shrimp and prawns in the world. Imports of shrimp and prawns experienced a compound annual growth rate of 5% from 2012 to 2016.
- Frozen shrimp and prawns made up 95% of Spain's shrimp and prawns imports, followed by frozen cold-water shrimp and prawns with 2% market share, and prepared or preserved shrimp and prawns with 1.3% market share.
- Argentina (imports worth US$357 million), Ecuador (imports worth US$232.1 million), and China (import worth US$8.0 million) are Spain's top shrimp and prawns suppliers. All together making up 56% of Spain imports in this category.

- Since 2013, Spain has consistently imported frozen cold-water shrimp and prawns products from Canada. This category witnessed a significant compound annual growth of 266% from 2013 to 2016. However, the other shrimp and prawns categories witness minimal imports from Canada.
- According to the Market Assessment of Opportunities and Challenges report, shrimp products (such as canned, or processed shrimp) is an ideal market opportunity for Canadian crustaceans exporters in the EU but more specifically in Spain as it is the leading EU importer of shrimp products.
- With the implementation of Under CETA, EU tariffs on shrimp will be eliminated within seven years. Duty-free access for an annual volume of 23,000 tonnes is provided under a tariff rate quota during the tariff elimination period. See the EU Tariff Schedule under CETA for details, specifically tariff items denoted with "TQShrimps".

Spain's imports of shrimp and prawns products from the world from 2012 to 2016, in US$ millions

Category		2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total shrimp and prawns		**979.6**	**1,092.9**	**1,247.5**	**1,156.8**	**1,188.3**	**4.94%**	
030617	Frozen shrimp and prawns	934.4	1,049.5	1,191.2	1,109.1	1,139.5	5.08%	95.9%
030616	Frozen cold-water shrimp and prawns	20.0	15.6	21.7	22.0	22.8	3.35%	1.9%
160521	Prepared or preserved shrimp and prawns	12.4	13.9	19.6	14.4	15.1	4.99%	1.3%
160529	Prepared or preserved shrimp and prawns (in airtight containers)	5.1	4.9	5.8	5.4	4.3	-4.34%	0.4%
030626	Live, fresh, chilled, dried, salted cold-water shrimp and prawns	5.1	5.9	4.6	3.4	3.5	-8.88%	0.3%
030627	Live, Fresh, chilled, dried, salted shrimp and prawns	2.5	3.0	4.6	2.5	3.1	4.92%	0.3%

***CAGR** – Compound annual growth rate

Spain's imports of shrimp and prawns products from Canada from 2013 to 2016, in US$ thousands

Category		2013*	2014	2015	2016	CAGR* 2012-15	Market share
Total shrimp and prawns		**7.8**	**349.3**	**380.4**	**384.4**	**266%**	
030616	Frozen cold-water shrimp and prawns	7.8	320.7	361.3	384.4	266%	100%
030617	Frozen shrimp and prawns	N/A	N/A	9.0	N/A	N/C	N/C
160521	Prepared or preserved shrimp and prawns	N/A	N/A	N/A	N/A	N/C	N/C
160529	Prepared or preserved shrimp and prawns (in airtight containers)	N/A	28.7	10.1	N/A	N/C	N/C

Source for both: Global Trade Tracker, 2017. N/A – Data not available N/C – Not calculable ***CAGR** – Compound annual growth rate
***Note**: There is little data for shrimp and prawn imports from Canada in 2012 and as such was not evaluated in this table.
Spain's import data retrieved on March 1, 2017.

Lobster

- Spain is the fifth-largest importer of lobster products in the world, with import sales amounting to US$192 million in 2016.
- Canada is the third-largest supplier of lobster products to Spain, with Spain's imports amounting to US$23.7 million.
- Lobster imports saw a compound annual growth rate of 1.1% from 2012 to 2016. Spain's lobster import from Canada saw the fastest and highest compound annual growth of 26.2% during the five year review period.
- According to the Market Assessment of Opportunities and Challenges in the EU report, Spain is an ideal market for Canadian lobster exporters, it is the second-largest market in the EU region to import lobster products from Canada.
- Live lobster will see an immediate 8% tariff elimination with the implementation of CETA. Frozen lobster, Spain's largest imported crustacean product from Canada, will see a 6 to16% tariff being phased-out in three years and processed lobster will see its 20% tariff phased-out in five years.

Spain's imports of lobster products from the world from 2012 to 2016, in US$ millions

Category		2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total lobster		**183.4**	**164.2**	**181.1**	**171.6**	**191.9**	**1.14%**	
030615	Frozen Norway lobster	57.4	52.7	64.9	47.5	57.6	0.07%	30.0%
030622	Live, fresh, chilled, dried, salted lobster	60.7	59.3	59.7	54.2	56.4	-1.78%	29.4%
030612	Frozen lobster	11.4	10.6	16.5	20.7	25.7	22.49%	13.4%
030611	Frozen rock lobster and other sea crawfish	35.6	25.7	21.9	21.4	23.9	-9.50%	12.4%
030621	Live, fresh, chilled, dried, salted rock lobster and other sea crawfish	4.5	4.5	7.3	15.2	15.1	35.19%	7.9%
030625	Live, fresh, chilled, dried, salted Norway lobster	13.5	11.4	10.4	12.5	13.0	-1.11%	6.7%
160530	Prepared or preserved lobster	0.3	0.0	0.5	0.1	0.3	0.70%	0.2%

Spain's imports of lobster products from Canada from 2012 to 2016, in US$ thousands

Category		2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total lobster		**9,351.6**	**9,547.3**	**14,048.4**	**17,626.9**	**23,694.6**	**26.2%**	
030612	Frozen lobster	5,603.8	5,109.8	10,957.4	15,546.7	20,343.4	38.0%	85.9%
030622	Live, fresh, chilled, dried, salted lobster	3,660.3	4,437.5	3,030.1	2,055.2	3,348.6	-2.2%	16.5%
160530	Prepared or preserved lobster	87.6	0.0	60.9	25.0	2.6	-58.6%	0.0%
030615	Frozen Norway lobster	0.0	0.0	0.0	0.0	0.0	N/C	0.0%

Source for both: Global Trade Tracker, 2017. N/C – Not calculable ***CAGR** – Compound annual growth rate
Note: Spain's import data retrieved on March 1, 2017.

Crab

- Crabs experienced positive growth with imports worth US$58.7 million in 2016, a 3% increase from the previous year. However, the prepared/preserved and live, fresh, chilled, dried, and salted crabs categories both saw continued five-year decline with a compound annual growth rate of -12.7% and -1.8%. Whereas, frozen crabs saw a 4.48% period growth rate and accounted for over 55% of Spain's imports of crab products from the world.
- In 2016, there were no crab imports from Canada. Spain crab imports from Canada were infrequent during the five-year review period, most of which occurred in 2012, 2014, and 2015.
- Spain's top suppliers of crab products were the United Kingdom with imports worth US$24.3 million, Namibia with US$7.5 million, and Ireland with US$6.3 million in crab imports. Combined, these countries made up 65% of Spain's crab imports from the world.
- With the implementation of CETA, fresh crab will see immediate tariff elimination of its 7.5% tariff, frozen crab will see tariff elimination of its tariff in three years, and prepared and preserved crab will see tariff elimination of its 8% tariff within seven years.

Spain's imports of crab products from the world from 2012 to 2016, in US$ millions

Category		2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total crabs		**56.3**	**53.8**	**66.7**	**57.0**	**58.7**	**1.05%**	
030614	Frozen crab	27.3	26.9	36.6	31.8	32.5	4.48%	55.4%
030624	Live, fresh, chilled, dried, salted crab	26.8	25.8	28.0	23.6	24.9	-1.83%	42.5%
160510	Prepared or preserved crab	2.2	1.1	2.2	1.5	1.3	-12.69%	2.1%

***CAGR** – Compound annual growth rate

Spain's imports of crab products from Canada from 2012 to 2016, in US$ thousands

Category		2012	2013	2014	2015	2016	CAGR* 2016-12	Market share
Total crabs		**0.2**	N/.A	**146.9**	**198.7**	N/A	N/C	
30614	Frozen crab	0.2	N/.A	146.9	198.7	N/.A	N/C	N/C
30624	Live, fresh, chilled, dried, salted crab	N/.A	N/.A	N/.A	N/.A	N/.A	N/C	N/C
160510	Prepared or preserved crab	N/.A	N/.A	N/.A	N/.A	N/.A	N/C	N/C

Source for both: Global Trade Tracker, 2017. N/A – Data not available N/C – Not calculable
***CAGR** – Compound annual growth rate
Note: Spain's import data retrieved on March 1, 2017.

Other crustaceans

- The imports of other crustacean products have dropped by a compound annual growth of 3.6% from 2012 to 2016, only accounting for 2% of Spain's crustacean imports from the world, worth US$28.6 million in 2016.
- Spain's top suppliers of other crustacean products came from the Netherlands (with imports worth US$12.5 million), Peru (worth US$5.6 million), and Portugal (worth US$1.8 million). These three supplying countries made up 70% of Spain's imports from the world.

Spain's imports of other crustaceans from the world from 2012 to 2016, in US$ millions

Category		2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Total other crustaceans		**31.7**	**30.6**	**29.4**	**24.0**	**28.6**	**-2.56%**	
030629	Live, fresh, chilled, dried, salted crustaceans (other)	10.1	10.0	11.4	10.2	12.2	4.75%	42.5%
030619	Frozen crustaceans (other)	14.3	13.7	9.5	10.7	11.7	-4.85%	41.0%
160540	Prepared or preserved crustaceans (other)	7.3	6.9	8.5	3.1	4.7	-10.41%	16.5%

Source: Global Trade Tracker, 2017. ***CAGR** – Compound annual growth rate

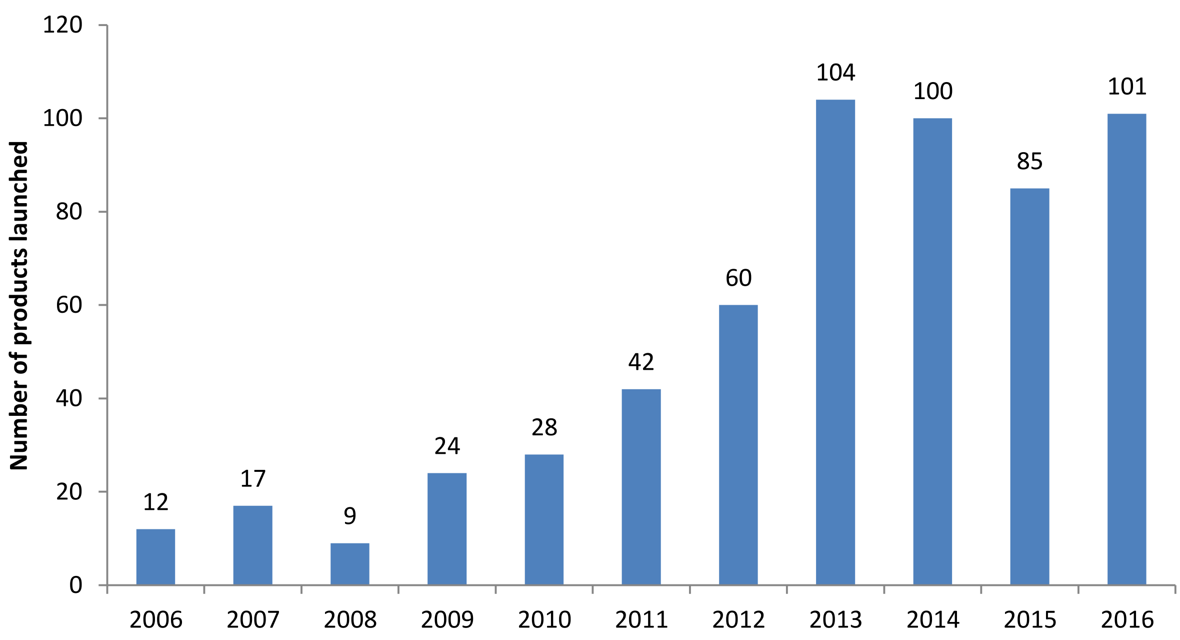
Note: Spain's import data retrieved on March 1, 2017.

Value-added crustacean products

The production of value-added crustacean products has been intensifying in Spain due to the growing demand for innovative and convenient fish and seafood products (Euromonitor, 2017). This is apparent based on a ten-year review of seafood product (i.e. lobster, shrimp, prawns, crabs, etc.) launches in Spain from 2006 to 2016. Within the last ten years of the review period, there were 582 product launches containing crustacean ingredients, 450 of which was launched in the last few years of the review period.

Over 77% of the products launched in Spain occurred in the meal and meal centers, processed fish, meat and eggs products, and snacks categories. The top crustacean ingredients used in the product launches were shrimp, prawns, and crab. Combined together shrimp and prawns were identified as an ingredient for 510 product introduction within the 10 year review period. Followed by crab which was used in 362 products, other crustaceans in 94, and lobster in 45 products.

Product introduction containing crustaceans products from 2006 to 2016



Source: Mintel, 2017.

Top ten launch categories of products containing Crustaceans, from 2006 to 2016.

Category	Number of launches	% of total launches
Meals & meal centers	217	37.3%
Processed fish, meat & egg products	177	30.4%
Snacks	54	9.3%
Soup	50	8.6%
Sauces & seasonings	33	5.7%
Savoury spreads	25	4.3%
Pet food	19	3.3%
Side dishes	6	1.0%
Dairy	1	0.2%
Total	**582**	**100.0%**

Top ten crustacean ingredients used in product launches in Spain & their top five categories, from 2006 to 2016.

Crustacean Ingredient	Meals & Meal Centers	Processed Fish, Meat & Egg Products	Snacks	Soup	Sauces & Seasonings
Surimi (shrimp)	67	73	8	0	0
Shrimp	63	32	7	20	8
Crab	62	29	10	13	8
Prawn	60	32	15	8	7
Crab flavour	44	37	5	1	0
Crab extract	30	46	4	0	0
Squid	57	13	2	2	1
Whiteleg shrimp	11	7	10	1	0
Lobster	3	6	1	14	1
Shrimp powder	10	2	3	0	1

Source for both: Mintel, 2017.

For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Spain**
  www.tradecommissioner.gc.ca/es

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

For additional information on Seafood Expo Global (SEG) 2017, please contact:

- **Ben Berry, Deputy Director**
  Trade Show Strategy and Delivery
  Agriculture and Agri-Food Canada
  ben.berry@agr.gc.ca

Resources

Euromonitor International, 2016. Fish and Seafood.

Euromonitor International, 2016. Processed Meat and Seafood.

Global Trade Tracker, 2017.

Market Assessment of Opportunities and Challenges in the EU, 2017.

Mintel, Global New Products Database, 2017.

Trade Commissioner Services, 2017.

Sector Trend Analysis

Crustacean trends in Spain
Global Analysis Report

Prepared by: Ranna Bernard, Market Analyst.

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Agriculture and Agri-Food Canada, Global Analysis
1341 Baseline Road, Tower 5, 3rd floor
Ottawa, ON
Canada, K1A 0C5
E-mail: MAS-SAM@agr.gc.ca

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