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Report Highlights:

Spain represents a compelling opportunity for U.S. seafood exporters as the fourth largest importer of fish and seafood in the world, with 2025 imports reaching almost $11 billion from over one hundred countries. Despite operating Europe's largest fish processing industry and one of the EU's largest fishing fleets, Spanish domestic production cannot meet the country's substantial demand—Spain ranks as the second-highest per capita consumer of fish and seafood in the EU. The Spanish market's strong preference for processed products, especially canned fish, distinguishes it within the EU and supports a robust processing industry. The United States exports over $80 million of seafood to Spain.

Executive Summary

Spain represents one of the most compelling opportunities for U.S. seafood exporters in the global marketplace. As the fourth largest importer of fish and seafood in the world—trailing only the United States, China, and Japan—Spain punches well above its weight in seafood consumption and trade. The country boasts Europe's largest fish processing industry and maintains exceptionally high per capita consumption rates. Despite operating one of the EU's largest fishing fleets, Spanish domestic production falls far short of meeting consumer demand, creating a structural dependence on imports that ensures continued market access for international suppliers.

In 2025, Spain imported $10.8 billion worth of seafood products from over one hundred countries worldwide, representing a 3 percent increase from the previous year. This import dependency stems from Spain's position as the second-largest per capita consumer of fish and seafood in the European Union. Fish and seafood hold a deeply rooted place in Spanish culinary tradition and are viewed as healthy, nutritious staples consumed in every conceivable form. Spain's position as the second-largest producer of canned fish and seafood in the world and the EU's largest frozen fish processor create substantial opportunities for U.S. raw material suppliers.

The United States currently holds the 23rd position among seafood suppliers to Spain, with exports totaling $81.6 million in 2024. While this represents a 17 percent decline from the previous year, it reflects broader market dynamics rather than diminished opportunity. U.S. seafood products are generally recognized in Spain as high quality, though they typically command premium prices compared to competing origins. The top U.S. exports include frozen surimi ($20 million), hake ($18 million), Alaska pollock ($14 million), and lobster ($11 million), demonstrating Spanish demand for both processed ingredients and premium whole products.

For U.S. companies interested in exploring or expanding their presence in the Spanish seafood market, the Office of Agricultural Affairs in Madrid stands ready to provide detailed information, importer contacts, and sector-specific guidance at AgMadrid@usda.gov.

SECTION I: SPAIN SEAFOOD MARKET OVERVIEW

Spain is the second largest producer of seafood and canned fish and in the world and the number one producer in the EU. The aquaculture product manufacturing industry 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. In Spain, fishery and the associated industry have a large socio-economic importance, especially in areas highly dependent on fisheries, such as Galicia or the Basque Country.

Notwithstanding its powerhouse producer and processor status, Spain is a net importer of fish and seafood. In fact, as the fourth largest importer of fish and seafood in the world—trailing only the United States, China, and Japan—Spain punches well above its weight in seafood consumption and trade.

In 2025, Spain imported seafood products from over 100 origins, valued at $10.8 billion, up almost 14 percent from previous year. The EU was Spain’s main import origin ($3.9 billion), accounting for 36 percent of Spain’s total fish and seafood imports in 2025. Morocco leads extra-EU suppliers with $1.2

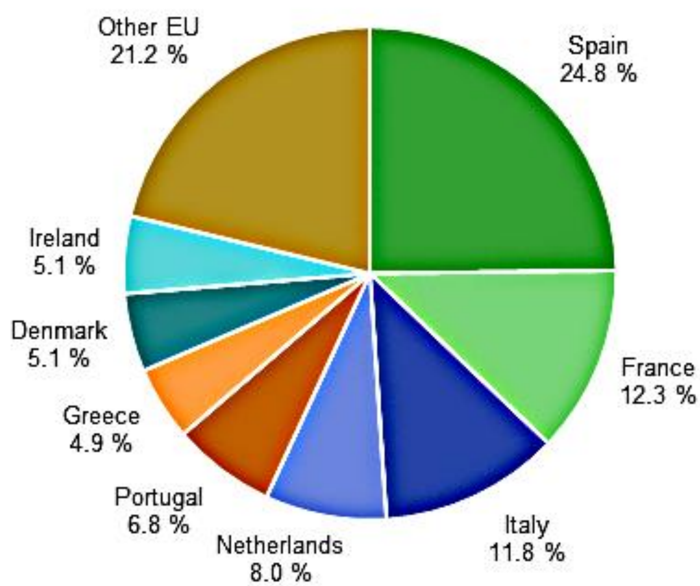
billion in exports to Spain, followed by Ecuador ($943 million) and Portugal ($814 million). The United States was the 23rd largest origin of seafood products to Spain with a value of $81.6 million.

Spain's total seafood exports in 2025 reached $6.7 billion, 13 percent up from the previous year. Imports are expected to continue to outpace exports, ensuring that Spain remains an important market for 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 fishery and aquaculture products.

Figure 1. Member State Share the EU's Fishing Fleet 2024
(% share based on gross tonnage)



Source: Eurostat

The Spanish fleet is one of the largest in the EU and fishes in most fishing zones. In 2024, the Spanish fishing fleet was made up of 8,432 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 – 2025 Edition," Spain is the second largest per capita fish and seafood consumer in the EU, with 40.7 kg per capita consumption per year, three 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.

Notably, according to Euromonitor, fresh fish and seafood sales in Spain fell in 2025 as consumers increasingly viewed these products as costly and difficult or time-consuming to prepare, driving a shift toward processed alternatives. Crustaceans experienced the smallest decline, maintained by the importance of prawns in traditional Spanish cuisine and robust foodservice demand in tourist areas, though frozen options continued to compete effectively.

Industry groups like the Spanish Fisheries Confederation (CEPESCA) emphasized declining consumption among younger generations and criticized the government's decision to exclude fish from Spain’s reduced VAT list, which maintained upward pressure on prices. Looking ahead five years, fish and seafood volume sales will likely remain flat, with value growth stemming primarily from price increases rather than volume gains. Producers will focus more on efficiency and sustainability initiatives, but stricter ecosystem protections may further limit supply and intensify affordability concerns.

Perhaps the most significant trend reshaping the Spanish market is the growing demand for convenience. Consumers increasingly prefer pre-packaged fish and seafood in smaller portions. Convenience matters most to younger shoppers, smaller households, and time-pressed consumers. Retail chains are expanding shelf space for fish and seafood trays, whether they maintain traditional attended fish counters or offer only self-service packaged options. Ready-to-buy products appeal to consumers seeking single- or two-person portions who want to save time and avoid lines; this convenience trend, coupled with sustainability concerns, is strengthening preference for new packaged formats.

The retail challenges are offset by robust growth in the foodservice sector, driven by a surge in domestic and foreign tourism. The culinary tourism market in Spain is undergoing a significant expansion with travelers seeking immersion in local culture, specifically through fresh, regional produce, tapas bars, and culinary trails. Spanish consumers are increasingly choosing to dine out, viewing seafood as an occasional treat rather than an everyday meal.

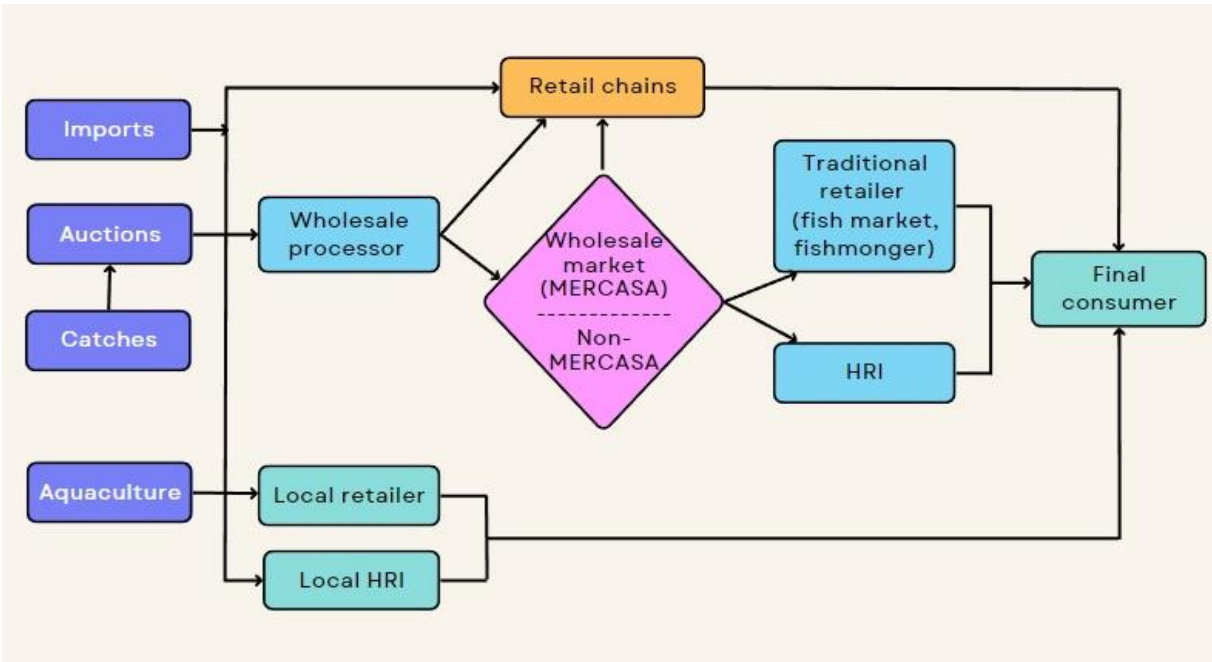
Distribution

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 markets. The most important fish wholesale markets are Mercamadrid and Mercabarna, in Madrid and Barcelona respectively.

In the Spanish retail sector, fresh products, including fish, are the key to attracting customers. Large-scale retailers are gaining market share from traditional markets by offering 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, chart by FAS Madrid

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

Two major trade shows provide excellent platforms for U.S. exporters to connect with Spanish buyers:

Seafood Expo Global – USDA Endorsed show

Dates: April 21-23, 2026
Location: Barcelona
Frequency: Annual

Seafood Expo Global/Seafood Processing Global in Barcelona is the world's largest seafood trade fair. The fair features more than 2,000 exhibiting companies from 87 countries. SEG 2024 was the largestever 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. Seafood Expo Global is an endorsed USDA show, with a USA pavilion and multiple American distributors. FAS posts across Europe, Africa and Asia attend with their buyers.

Conxemar

Dates: October 6-8, 2026
Location: Vigo, Pontevedra
Frequency: Annual

Every year, the Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of Fish Products and Aquaculture (CONXEMAR) organizes the 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.

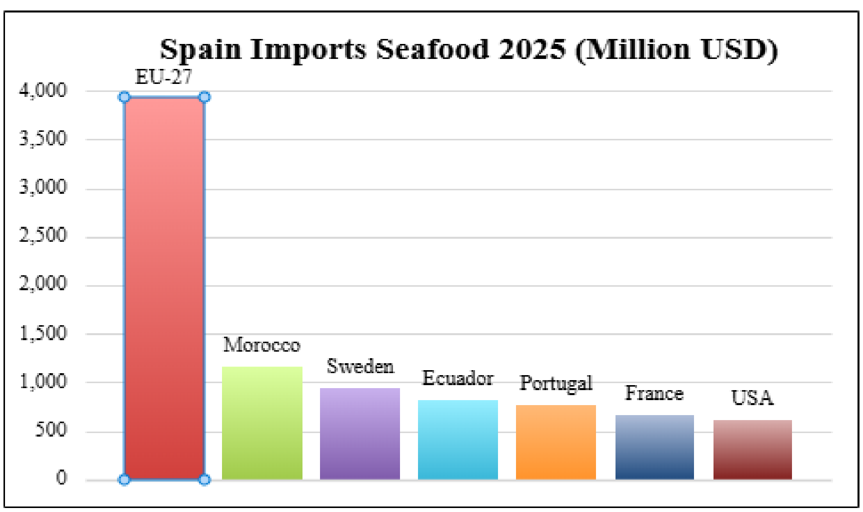
SECTION III: FISH AND SEAFOOD TRADE

Spain relies on imports, mainly from third countries, due to its high consumption and the large capacity of its fish and seafood processing 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 2025, Spain's seafood product imports from all origins were $10.8 billion. The main imported category was squid, followed by shrimp and prawns, tuna, and octopus. The main origin of Spanish seafood products imports in 2025 was the European Union, followed by Morocco. Within the EU, the main exporters of fish and seafood to Spain were Portugal, Sweden, 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 Top Seafood Suppliers 2025



Source: Trade Data Monitor LLC, chart by FAS Madrid

Spain imported $81.6 million of fish and seafood from the United States in 2025. In Spain, U.S. seafood is generally considered high quality but higher in price compared to that of competing countries. In 2025, Alaska pollock ($21.6 million), hake ($16.4 million), cod ($13 million), and lobster ($8 million) were among the most imported categories.

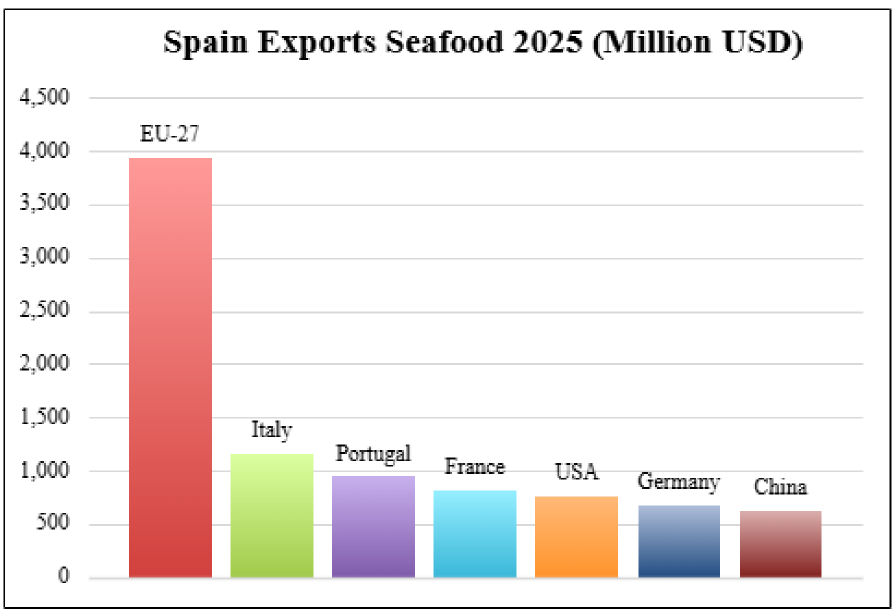
Table 1. Spain Imports Fish and Seafood Products from the USA by Category ('000 USD)

	Description	2023	2024	2025
	Total Seafood Products	**98,532**	**81,415**	**81,612**
030494	Alaska pollock	14,882	14,261	21,667
030474	Hake fillets, frozen	17,264	18,274	16,390
030495	Fish of the families bregmacerotidae	32,473	20,320	13,305
030632	Lavagantes live, fresh or chilled	11,157	11,660	8,093
030743	Lulas and sépias, frozen	6,584	5,160	5,366
030475	Alaska pollock	3,866	2,822	4,850
030771	Clams, cockles and ark shells	719	1,307	3,332
030312	Pacific salmon,frozen, nesoi	5,226	2,516	1,755
	Other	6,361	5,095	6,854

Source: Trade Data Monitor LLC

Exports

Figure 4. Spain Top Seafood Destinations 2025



Source: Trade Data Monitor LLC, chart by FAS Madrid

The top destination for Spanish fish and seafood in 2025 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 2025, Spanish total exports to the world reached $6.7 billion, 13 percent up from previous year. Exports to the United States increased two percent compared to the previous year.

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

	Description	2023	2024	2025
	Total Seafood Products	5,991,019	5,965,976	6,729,186
160414	Tunas, skipjack tuna and bonito	789,787	842,181	920,267
030743	Lulas and sépias, frozen	549,457	536,124	590,526
030752	Octopus, frozen	409,473	409,562	469,170
030617	Shrimps and prawns, frozen	396,633	381,338	375,498
160420	Fish, prepared or preserved, nesoi	224,787	215,030	259,862
030343	Skipjack tuna	227,906	185,202	204,385
030366	Hake, frozen	168,897	171,238	185,543
160554	cuttle fish and squid, prepared or preserved	121,637	145,537	159,432
	Other	3,102,442	3,079,764	3,564,503

Source: Trade Data Monitor LLC

SECTION IV: FISH AND SEAFOOD IMPORT REQUIREMENTS

Seafood imported into Spain, or into the broader EU-27 market, must originate from approved third countries, processed in approved establishments (plants, vessels, cold stores), and be accompanied by official health certificates. Aquaculture and live bivalve mollusks must come from approved production zones, with all establishments appearing on official EU lists.

Since 2006, the U.S. Seafood Inspection System has been recognized by the EU as equivalent to the European Seafood Inspection System. While this status does not entirely apply yet to the export of live bivalve mollusks, in whatever form, significant updates have occurred to allow limited trade. With regard to seafood, the mutual recognition facilitates bilateral trade with the United States. Furthermore, it creates a framework under which EU Member States cannot impose Member State-specific requirements on U.S. seafood exporters on top of EU harmonized legislation. However, differences in interpretation among Member States can lead to delays at Border Control Posts (BCPs).

In February 2022, following a 10-year ban, the US and EU resumed bilateral trade in live, raw, and processed bivalve molluscan shellfish—including oysters, clams, mussels, and whole or roe-on scallops. As a direct result, the United States became eligible to send bivalve mollusks to the EU – initially only from approved firms in the States of Washington and Massachusetts. In practice the EU market is now open for molluscan shellfish, including oysters, clams, mussels, and scallops, from the United States.

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 three documents required for export to the European Union. They are:

- EU export health certificate.
- EU illegal, unreported, and unregulated (IUU) fishing catch document for fisheries products harvested in the US, to prevent, deter, and eliminate IUU fishing.
- EU Annex IV documents for EU import when wild-caught seafood is either **processed** outside the EU (requiring a Processing Statement, Annex IV 14.2) or stored, transshipped, split, or consolidated in a non-EU country without processing (requiring a Non-Manipulation Document, Annex IV 14.1), with valid underlying catch certificates to maintain traceability.

The EU export health certificate is required by the EU Directorate-General for Health and Consumer Protection and attests to the safety of fish and fishery - both wild and aquaculture - products shipped to the EU. 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.