



# CBI Product Fact Sheet: Frozen Squid and Cuttlefish in Spain and Southern Europe

*'Practical market insights for your product'*

Spain is the largest European market for squid and cuttlefish. This product fact sheet provides you with information on product specifications, statistics, trends, market channels and segments, and competitiveness of squid and cuttlefish in the Spanish market. It will also include some broader analysis of the cephalopod market in southern Europe.

## Product definition

Figure 1: Squid (left) and cuttlefish (right)



Source: Innova database

Squid and cuttlefish are both *Cephalopods*. Squid belongs to the order of *Teuthoidea* and cuttlefish to the order of *Sepiida*. Octopus also belongs to the family of *cephalopods*. In Spain, squid is commercially referred to as *calamar(es)*, cuttlefish is referred to as *Sepia*, and octopus as *pulpo* (or *pota*). The HS codes referred to in this product fact sheet are given in table 1.

**Table 1: HS codes for squid and cuttlefish**

030741	Cuttlefish and squid, in shell or not, live, fresh or chilled
030749	Cuttlefish and squid, in shell or not, frozen, dried, salted or in brine
160554	Cuttlefish and squid, prepared and preserved (excl. smoked)

## Product specification

This section provides you with basic information about specifications for fishery and aquaculture products in Spain. Important legislation is the recently renewed Common Organisation of the Market, which contains the rules of the organisation of the market for fishery and aquaculture products in the EU. Legislation about how to inform EU consumers about fishery and aquaculture products is also relevant to you. Below, you can find more specific information about the labelling, packaging, and processing of squid and cuttlefish for the EU market.

### Labelling:

The contents of labelling must be provided in Spanish. When importing fishery and aquaculture products into the EU, the following information must be provided on the labelling or packaging of the fishery product, or by means of a commercial document accompanying the goods:

- The name of the product: The commercial and scientific name of the species. Commercial and scientific names used in Spain can be found [here](#);
- Production method: Caught at sea (pescado);
- Catch Area: One of the areas mentioned [here](#);
- Presentation: Freeze-dried, deep-frozen, brined, salted, etc;
- Net Weight: The net weight must be mentioned on pre-packed products;
- Date of minimum durability: Consisting of day, month, and year, in that order and preceded by the words "best before" or "best before end" or the "use by" date;
- EU seller: The name or business name and address of the manufacturer, packager or seller established in the EU;
- The package must contain an EU approval number;
- The packaging must also contain a lot number;
- Ingredients: Only for prepared or preserved products;
- Conservation temperature: The minimum temperature for conservation must be mentioned;
- Nutrition: Nutrition must only be mentioned if a nutritional claim has been made on the product packaging.
- Barcode: the label must contain a barcode which provides information about the transport of the product. With a barcode the product can be tracked and traced.

Zona de captura	Identificación de la empresa Nº R.S.I o Nº de autorización	
Denominación comercial (1)	Lote	Fecha de duración mínima
Denominación científica	Método de producción	Modo de presentación
Temperatura de conservación (2)		
Peso neto/escurrido(3)	Ingredientes(4)	



**Packaging:**

Packaging requirements differ widely between customers and market segments. Therefore, it is crucial that you discuss your customers’ preferred packaging requirements. Some general characteristics are:

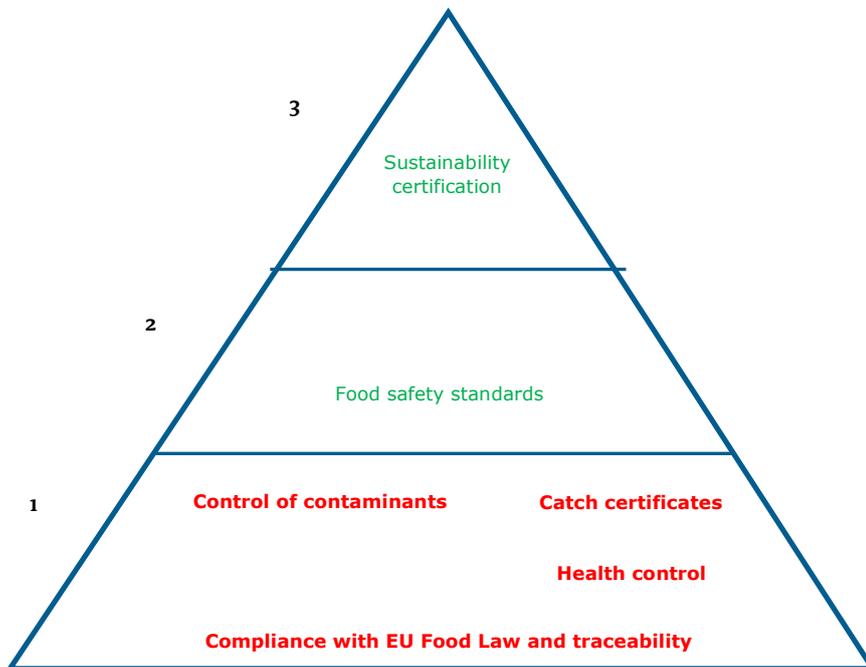
- Mostly sold as whole round, as tubes (tub), as stripes (tires) or as rings (anelles);
- Retail packaging is mostly done in trays with a plastic filter or in polybags. Portions vary between 400 and 1000 grams for frozen tubes or whole round products and prepared or preserved products are often portioned between 200 and 500 grams;
- Wholesale packaging is mostly delivered in 1-5 kg polybags or cardboard boxes packed in master cartons;
- The competent authority with regard to packaging sizing is the [Ministry of Industry, Energy and Tourism](#). The competent authority with regard to approved materials and articles for food packaging is the [Ministry of Health, Social Services and Equality](#).



**Buyer requirements**

Buyer requirements can be divided into: (1) musts, requirements you must meet in order to enter the market, such as legal requirements; (2) common requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market; and (3) niche market requirements for specific segments. You can find a general overview of the [EU buyer requirements for fish and seafood](#) on the Market Intelligence Platform of CBI.

**Figure 2: Buyer requirements for squid and cuttlefish in Spain**



## Requirements you must meet (1)

These are the legal requirements for the import of squid and cuttlefish into Spain. More information about these legal requirements can be found on the [EU Export Helpdesk](#).

### Compliance with EU Food Law and traceability:

- The EU Food Law is the basis for legislation with respect to food safety in the EU. The EU Food Law is supplemented by other EU legislation regarding hygiene and the use of forbidden substances;
- Traceability is defined by the EU as the ability to trace and follow squid and cuttlefish, and other seafood products that will be used for consumption, through all stages of production, processing, and distribution;
- EU companies that deal with squid and cuttlefish, and other seafood products have to provide information about the supplier and the buyer on a batch level;
- Companies in the EU are required to have systems in place that allow for information regarding traceability, in order to be able to identify where and how squid and cuttlefish were produced and processed in the third country. Therefore traceability is also important for exporters from developing countries.

### Health control:

Squid and cuttlefish that are imported into the EU must comply with the following general health requirements:

- Country health approval: The European Commission's Directorate General for Health and Consumers (DG SANCO) applies a procedure to assess if your country complies with EU Public and Animal Health conditions. Part of this procedure is an on-site review by the Food and Veterinary Office (FVO);
- Approved establishments: Squid and cuttlefish can only be imported into the EU, if they have been processed and prepared in establishments that are on a list approved by DG SANCO. The competent authority in your country is responsible for the approval of your company. If you are approved, you will receive an EU approval number which has to be mentioned on the label;
- Health certificates: Imports of squid and cuttlefish into the EU must be accompanied by a health certificate signed by the competent authority of the exporting third country. This certificate states that your products are suitable to be exported to the EU. In practice, various models of health certificates are used, which can depend on the category of products, the species concerned or special health conditions;
- Hygiene and health control: Upon arrival in the EU, squid and cuttlefish and the accompanying certificates must be inspected by veterinarian

### Considerations for action

- [Eurofish](#) provides a very concise summary of EU traceability regulation.
- This [fact sheet](#) gives you more information about traceability.
- On the website of the European Commission, you can find more information about the [EU Food Law](#).
- Here, you can find more information about the activities of the [Food and Veterinarian Office](#) of the EU.
- See the list of [EU approved fishery establishments](#) for your country to check which of your competitors have access to the EU.
- Be sure that you use the newest [Health certificate](#) that is required from March 2013.

officials. The result of the inspection is reflected in the [Common Veterinary Entry Document](#) (CVED).

**Control of contaminants:**

Imports of squid and cuttlefish should comply with EU legislation designed to ensure that the product is safe to eat and does not contain contaminants at levels that could threaten human health:

- Squid and cuttlefish containing contaminants at a level that is unacceptable for public health will be rejected;
- The level of contaminants must be kept as low as can reasonably be achieved;
- For several contaminants, maximum levels are set to protect public health.

**Catch Certificate:**

Since 2010, squid and cuttlefish must be accompanied by a catch certificate. This certificate is needed to show that your squid and cuttlefish products do not come from Illegal, Unreported, and Unregulated (IUU) fishing. The following information is relevant for obtaining a catch certificate:

- The catch certificate must be drawn up in accordance with [Annex II](#) of the IUU Regulation, or [Annex IV](#) of its implementing Regulation (for small-scale fisheries fulfilling the requirements of Article 6 of this Regulation);
- The catch certificate must be submitted by the importer to the competent authorities of the Member State in which the squid and cuttlefish will be imported. The certificate must be submitted at least three working days before the estimated time of arrival at the place of entry into the territory of the EU. It is your responsibility to deliver the catch certificate to the importer;
- Products listed in [Annex I](#) of the IUU regulation are exempted from the obligation to submit a catch certificate;
- Catch certificates should be validated by a public authority of the flag state of the fishing vessel that caught the squid and cuttlefish;
- Landing operations by third country fishing vessels can only take place in [designated ports](#);
- The competent authorities of the Member States may carry out verifications to ensure the legality of the squid and cuttlefish;
- A catch certificate must contain the following information:
  - Product name, code, and volume landed;
  - List of vessels names and/or registration numbers;
  - Flag state authority validation;
  - Transport details;
  - Importer declaration.

- If the EU does not yet accept catch certificates provided by your country's competent authority, check [here](#) to see the regulations with which the competent authority needs to comply. Discuss with your sector association how you can lobby for action from the side of your country's competent authority.
- Discuss with your buyer whether he has a format for the catch certificate or if you need to use the standard format as provided [here](#).
- Visit the website of [the sub-directorate check and inspection](#) that is part of the ministry of agriculture, feeding, and environment for more information about catch certificates and import regulations for fishery products in Spain.

## Common requirements (2)

For squid and cuttlefish, common requirements are mainly requirements with respect to food safety. More information about which food safety standards are relevant can be found on the [ITC standards map](#).

### **Food safety standards**

Third-party food safety certification schemes such as the British Retail Consortium (BRC) are very important in the EU, especially in northern Europe. It is especially a buyer requirement if you supply to (large) international retailers.

### **International Featured Standards (IFS)**



With regard to food safety certification, Spain is more IFS (often referred to as International Food Standards) oriented than BRC. This also holds for other countries in southern Europe. This standard was created by German and French retailers to ensure food safety, food quality, and related services.

### **British Retail Consortium (BRC)**



Food safety certification in Spain is important, but it is less rigorously applied than in countries in north-western Europe. It is a buyer requirement if you supply to large international retailers.

### **Considerations for action**

- For more information about food safety standards, visit this [website](#) to see which other standards can be applied.
- See the [IFS website](#) for more information if you have identified potential customers that have IFS certification as a requirement.
- See the [BRC database and website](#) to check which of your competitors are already BRC-certified and to find out more about the BRC standard.

## Niche market requirements (3)

In Spain, sustainability certification is still seen as niche market requirement. While some large retailers and catering companies are becoming interested in selling certified products, sustainability certification is currently still less important in Spain than in countries like the Netherlands and Germany.

### **Sustainability standards**

The Marine Stewardship Council (MSC) and Friend of the Sea (FOS) are the most relevant sustainability standards for captured seafood products in Spain.

### **Marine Stewardship Council (MSC)**



The most important certification organisation for wild-caught fish products. It focuses on sustainable fishing practices with minimum impact on the environment. No squid or cuttlefish fisheries are currently MSC-certified yet.

### **Considerations for action**

- See the [MSC website](#) for more detailed information about the process of certification and the potential advantages of MSC certification.

### Friend of the Sea (FOS)



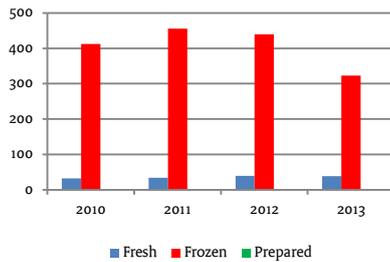
FOS is an Italy-based fisheries and aquaculture certification scheme. One Vietnamese company has certified handline squid and cuttlefish fisheries. Also, one purse seine fishery in Mexico and one line fishery in Chile are FOS-certified.

- Find out more about squid and cuttlefish fisheries that are already certified by FOS on the [FOS website](#).

### Trade and macro-economic statistics

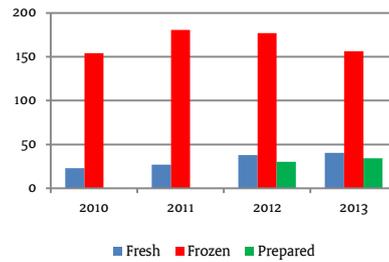
General information about trade figures in the EU is provided in [CBI Tradewatch](#). This section provides you with more detailed statistics in relation to the trade and consumption of squid and cuttlefish in Spain.

**Figure 3: Imports of squid and cuttlefish on the Spanish market in 2010-2013 (euro x million)**



Data source: Eurostat

**Figure 4: Re-exports of squid and cuttlefish from the Spanish market in 2010-2013 (euro x million)**



Data source: Eurostat

### Analysis and interpretation

#### Imports

- In 2013, European countries imported €1.0 billion of squid and cuttlefish. Compared to 2012, the total import value decreased by 15%. Possible explanations are the negative economic situation in several countries in southern Europe and a 45-day fishing ban in India, a main supplier of squid.
- The main market in the EU is clearly southern Europe. Italy and Spain are the largest importers of squid and cuttlefish; in 2013, Italy imported about €390 million and Spain more than €360 million. Other important countries with large imports are Portugal (€49 million), France (€45 million), and Greece (€43 million). Almost all imports are made up of frozen products.
- In 2013, Morocco (€93 million), the Falkland Islands (€76 million), India (€56 million), and China (€33 million) were the most important suppliers of squid and cuttlefish to Spain. Compared to 2012, all these countries exported less squid and cuttlefish to Spain. Especially imports from India dropped by almost 50%. The fishing ban mentioned above is the most

### Considerations for action

- If you want to access the Spanish market, consider participating in the [CONXEMAR](#) or [SEAFOOD BARCELONA](#) trade shows, which offer you the opportunity to showcase your products and meet with potential buyers in Spain, but also other southern European countries. Many Spanish buyers are also present at the [European Seafood Exhibition](#).

important reason for this decline.

- In Spain, total imports of squid and cuttlefish in 2013 were 133,000 tons. The most important species are frozen cuttlefish (30,000 tons), frozen squid *Loligo Patagonica* (40,000 tons), and frozen squid *Other* (32,000 tons). The reduced imports are likely a result of the economic crisis in Spain and can relate to improving catches from the domestic fleet.

**Exports**

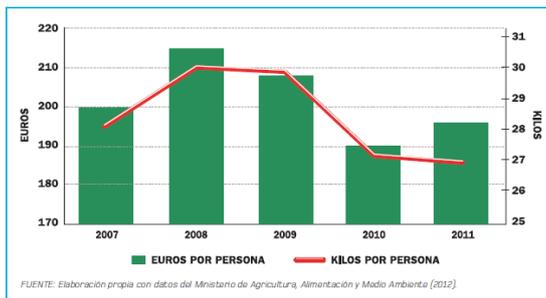
- Exports from Spain in 2013 accounted for €231 million. Frozen squid and cuttlefish represented €156 million, while fresh squid and cuttlefish, and prepared products amounted to €41 and €34 million, respectively. The main destination for Spanish exports of frozen squid and cuttlefish are Italy (€98 million), Portugal (€20 million), and France (€14 million).
- Other exporters of smaller volumes of frozen squid and cuttlefish are France (€34 million), Portugal (€17 million), and Italy (€13 million). While exports from Spain and France are relatively stable, exports from Portugal decreased significantly by almost 20% compared to 2011.

**Production**

- In 2011, EU member states captured approximately 115,000 tons of squid and cuttlefish. Spain caught 46,800 tons, France 20,500 tons, Italy 21,400 tons, Portugal 10,300 tons, and the UK 8,300. Between 2000 and 2006, EU catches varied between 140,000 and 160,000 tons; since 2006, annual landings have varied between 115,000 and 140,000 tons.

**Consumption**

**Figure 5: Seafood consumption in Spain, 2007-2011, in per capita euros and kilos**



Data source: MAGRAMA 2012

- The total EU cephalopod market is estimated to be around 0.7-0.8 million tons of which more than 50% is consumed in Spain and Italy. Although Spain has the largest per capita consumption of squid and cuttlefish, Italy is the largest consumer

- If you want to do business with Spanish companies and promote your products, it is a genuine advantage if you have sales officers who speak Spanish as well as a website in Spanish.
- If you are already doing business in Spain and are looking for new markets in southern Europe, it is advisable to find out which Spanish importers are trading with other southern European countries.

market in absolute terms. Pescanova estimates that Italy consumes 252,000 tons (4.2 kg per capita) and Spain 216,000 tonnes (4.6 kg per capita) of cephalopods.

- In Spain, overall seafood consumption has been declining since 2008. Consumption dropped from an expenditure of €215 and 30.5 kg in 2008 to an expenditure of €196 and 26.8 kg in 2011. It is expected that consumption will decline even further in the coming years as a result of the economic crisis. However, it is likely that the impact of this trend on squid and cuttlefish is limited because these are considered as low-cost items.
- If you would like to have more background information and insights into the data of fish consumption in Spain, check the [report](#) published by the Spanish government.

## Market Trends

[CBI Trend Mapping](#) provides you with general trends in the European seafood market for white fish, shrimp, and tuna products. This section provides more details about relevant trends for squid and cuttlefish, and the broader seafood market in Spain.

### Analysis and interpretation

#### Social:

- **Changing consumption patterns:** Fish consumption (excluding shrimp and molluscs etc.) in Spain has declined in previous years, but is expected to stagnate between 18 and 18.5 kg per capita per year. This is still much higher than the European average. The relative share of frozen fish versus fresh fish is expected to increase in the short term as a result of the economic crisis. In the long term, this trend is likely to persist as a result of changing fish-eating habits among young adults.

#### Technological:

- **Product innovation:** Recently, an innovative technique has been developed to produce surimi products from jumbo flying squid, a species that was difficult to market because of its sour taste and strong texture. Because of this technological innovation, demand for this squid species could increase.

#### Economic:

- **Value addition:** As with many other seafood products, there is also a trend in Spain towards adding value to squid and cuttlefish by producing ready-made products that are cooked or spiced. These products are often also skin-packed to make the product more appealing for consumers.

#### Environmental:

- **Sustainability is gaining recognition in retail:** Eroski (one of the largest Spanish retail chains) carried out a survey of over 3100 of its readers on
- Check [here](#) for the MSC article about the Eroski consumer study on sustainable fish consumption in Spain.

### Considerations for action

- If you are active in the Spanish market, discuss with your buyers if there are opportunities to focus on young consumers because this group has a high potential for cheap squid and cuttlefish products.

- If you are able to source jumbo flying squid, this could generate opportunities for you to sell these to Spanish buyers. Check [here](#) for the presentation of the innovative technique.

- See this [presentation](#) to find out more about innovations in the market for squid and cuttlefish.

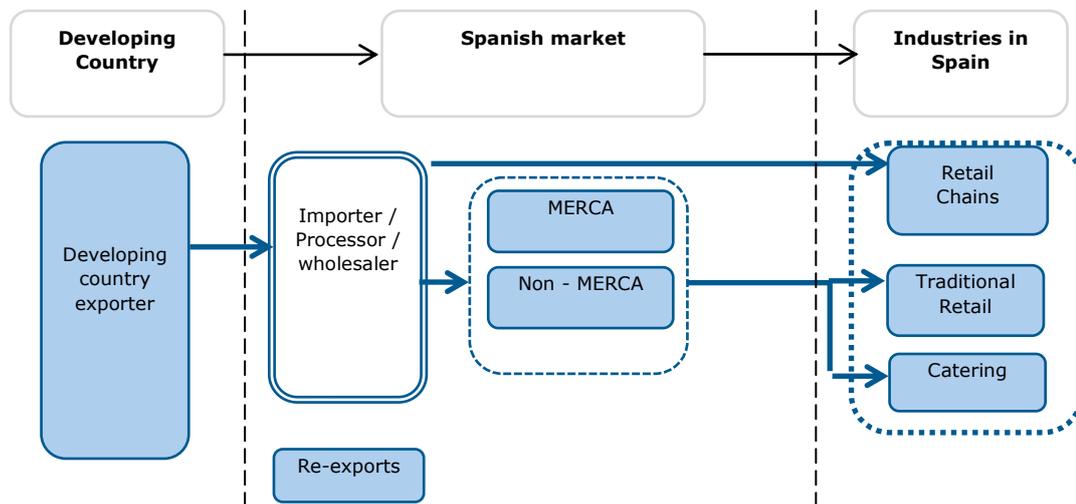
fish-eating habits in Spain. The survey revealed interesting information with regard to sustainable fishing. Almost all respondents stated that they preferred fish caught using environmentally-friendly methods, although only 43 per cent could mention any specific practice or initiative. This shows that consumers would value more information about sustainable fishing, which provides an opportunity for commercial, government, and not-for-profit organisations to help raise awareness and understanding. The survey concludes that consumers balance environmental concerns with cost considerations, as only half of consumers state that they would be willing to pay a little more for sustainable fish; the others would only prefer it at the same price.



## Market Channels and Segments

For more general information about market segments and channels, take a look at the [Market Channel and Segments document](#) available at the CBI market intelligence platform. This section provides some detailed information about the various marketing channels through which squid, cuttlefish, and octopus are marketed in Spain.

**Figure 6: Market channels and segments for squid and cuttlefish in Spain**



### Analysis and interpretation

- Squid and cuttlefish are traditionally marketed in Spain through the state owned network of Mercas or wholesale markets. Around 400 seafood companies operate within the 17 Mercas. In total, there are around 2,700 companies active in the Spanish seafood industry.
- Retail chains also used to purchase seafood

### Considerations for action

- The best route to the traditional retail

through the Mercas. Nowadays, retailers increasingly source squid and cuttlefish via exclusive agreements with domestic seafood suppliers and importers.

- The seventeen wholesale seafood markets specialise in fresh products, but considerable volumes of frozen products also are distributed to the traditional retail (local fish markets) and catering segments.
- The catering market in Spain is fragmented. The top ten catering companies only represent 6% of the total market. Most of the catering outlets still purchase fish at the local MERCAS or even the smaller local markets.
- The retail sector in Spain is more consolidated. The largest 3 retail groups (Eroski, Mercadona, and Carrefour) have a combined market share of 32%. Retailers often operate in purchasing groups that distribute products to the various retail chains. Purchasing groups mostly consist of a combination of hypermarkets, supermarkets, and discount stores.
- Retailers generally sell fresh and frozen squid and cuttlefish. These retail chains increasingly source their products directly from large importers. In addition, large catering companies tend to source squid and cuttlefish directly from large importers.
- According to Pescanova, about 50 % of the sales of squid and cuttlefish in Spain is sold in the retail and 50% in the catering segment. In the retail market, approximately 60% is sold in supermarkets and hypermarkets, 32% in speciality shops, and 8% on local fish markets.
- The at-home consumption of cephalopods in Spain is estimated at 105,800 tons, while consumption through catering is 110,200. 60% of the purchases of cephalopods for home consumption take place at supermarkets or hypermarkets, while 32% take place at specialised fish shops ([Pescanova 2011](#)).

and catering segment is through the Mercas. Go to the [website of the Mercas](#) in the region where you would like to supply fish, find the local association of seafood importers, and ask them to connect you to local distributors who are based in the market.

- This [report](#) provide with general information about the Spanish retail market.
- If you want to supply directly to the large retail chains and catering companies in Spain, you should try to get in touch with the larger Spanish importers. If you can comply with their buyer requirements, including a competitive price, they will be able to market your products in Spanish retail.

### Useful sources

- Ministry of agriculture, food, and the environment  
<http://www.magrama.gob.es/es/>
- MERCASA Network  
[www.mercasa.es](http://www.mercasa.es)
- Spanish seafood export profile (Seafish)  
[http://www.seafish.org/media/Publications/ExPro\\_Spain\\_SEP.pdf](http://www.seafish.org/media/Publications/ExPro_Spain_SEP.pdf)
- CONXEMAR  
[http://www.conxemar.com/v\\_portal/apartados/apartado.asp](http://www.conxemar.com/v_portal/apartados/apartado.asp)
- Seafood Barcelona Trade Show  
<http://www.seafoodbarcelona.com>

- European Seafood Exhibition  
<http://www.seafoodexpo.com/global/>
- EU Cephalopod conference  
[http://www.conxemar.com/congresos/conxemar2012\\_ingles.html](http://www.conxemar.com/congresos/conxemar2012_ingles.html)

This survey was compiled for CBI by LEI Wageningen UR  
in collaboration with CBI sector expert Siegfried Bank

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