

February 2024. Sector snapshot

The foodservice industry in Catalonia

The foodservice industry in Catalonia

ACCIÓ
Government of Catalonia



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Carried out by

Strategy and Competitive Intelligence Unit of ACCIÓ
ACCIÓ Business Strategy Unit
Eurecat

Collaboration

Foodservice Cluster

Barcelona, February 2024

1. The foodservice industry globally
2. The foodservice industry in Catalonia
3. Business challenges, trends and opportunities



1. The foodservice industry globally



The foodservice industry

The foodservice industry is the set of companies and organizations that are responsible for the preparation, distribution and sale of food and drinks for immediate consumption outside the home.

Types of organizations

Food processing

- Companies that undertake the transforming of raw material, food that comes from agriculture and livestock or other activities in the primary sector, into products ready for distribution to restaurants and catering companies whose clients are in the private or public sector.

Distribution

- It includes the groups of companies with a logistics focus that allow the products made by food processing companies to be transported to the final consumption channel. Companies focused on the storage of these products are also included.

End customer

Commercial restaurant and catering trade

- Companies that are engaged in the business of selling ready-to-eat foods to final consumers. The HORECA segment stands out in this group although there are also the segments of selling, delivery and catering en route.

Catering for public facilities

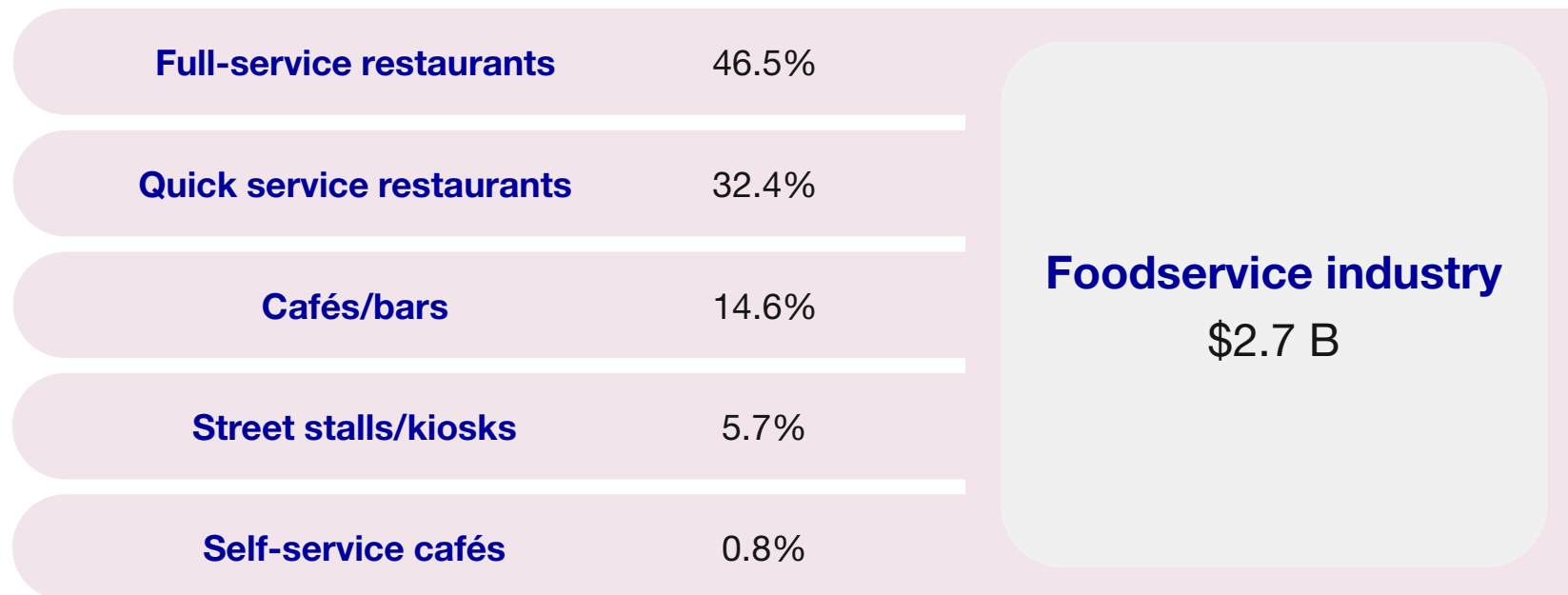
- Organizations focused on offering a main service and which for reasons of convenience include ready-to-eat food in their facilities make up this segment, such as schools, hospitals and prisons.



The foodservice industry worldwide

The global market size of the foodservice industry was **\$2.7B by 2022**. Among the five segments that make up the sector, full-service and limited-service restaurants are the ones with the largest market share (78.8%, together).

Global market size of the food service sector, 2022



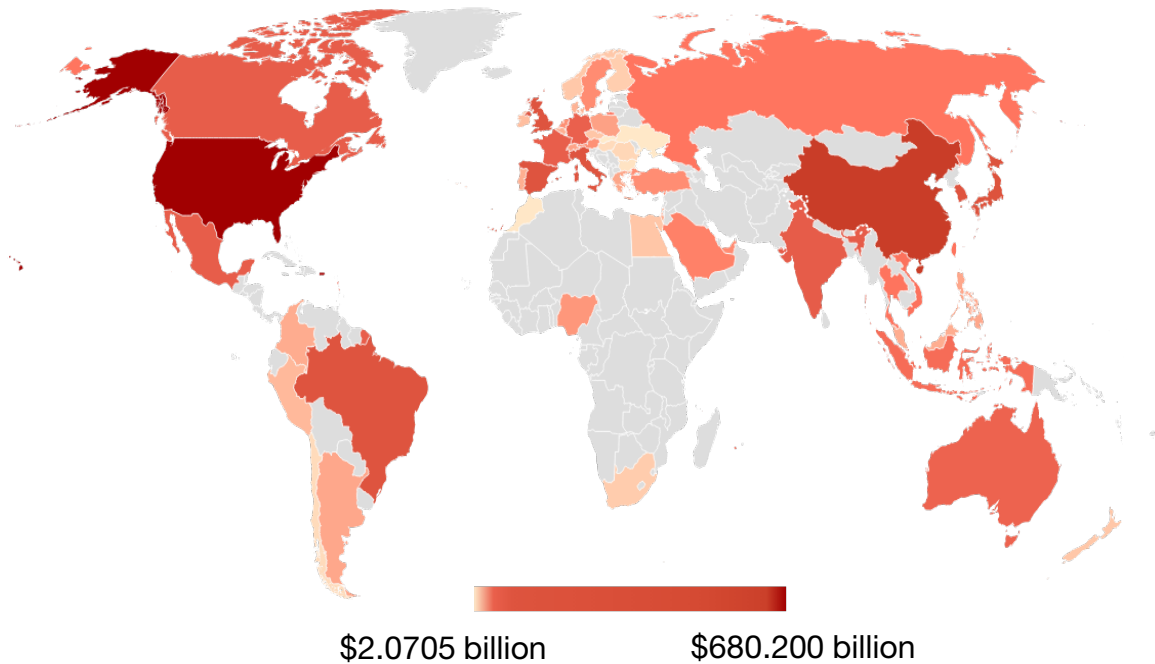
Notes: Full-service restaurants serve customers from the moment they walk in to the moment they leave: diners can make a reservation or walk in unannounced, and a waiter seats them immediately if there's no wait. Quick service restaurants offer dishes at unbeatable speeds and prices. Service is kept to a minimum and customer interactions with staff end when the customer receives their food (they do not offer table service)

Source: ACTION from "World Market for Consumer Foodservice", Euromonitor, 2023











Asia-Pacific, the region with the largest market size for foodservice

Spain is the fourth region in the world for sales of the foodservice industry on a global scale. Asia-Pacific is the number one region for sales, followed by North America and Western Europe.

Sales of the foodservice industry: 2022



Top 15 countries by sales, 2022

- | | |
|---|--|
|  1 United States \$680.2 billion |  9 India \$51.3742 billion |
|  2 China \$679.3073 billion |  10 Canada \$50.6648 billion |
|  3 Japan \$140.8177 billion |  11 Mexico \$50.4689 billion |
|  4 Spain \$87.154 billion |  12 France \$47,833.7 billion |
|  5 Brazil \$85.7394 billion |  13 Germany \$43.8266 billion |
|  6 Italy \$78,4278 billion |  14 Australia \$38,506.8 billion |
|  7 United Kingdom \$75.3815 billion |  15 Indonesia \$29.0856 billion |
|  8 South Korea \$72.086 billion | |

Source: ACCIÓ, based on Euromonitor, 2023

Main companies in the foodservice industry on a global scale

Restaurants and dining establishments

Providing food prepared for celebrations

Other dining services

Beverage establishments



Source: ACCIÓ, based on Orbis, 2023

FDI in food and beverages reaches €120 billion in the five-year period 2019-2023

The **volume of FDI in the food and beverage industry** totaled €119,473 billion in the five-year period 2019-2023, with a total of 2.978 projects that have employed 447.766 people. Spain is the fourth destination worldwide in receiving this FDI.

Food and beverage FDI in the world, 2019-2023

2,978 projects ▼ 11.1% (2014-2018)

€195.5 billion in investment

▼ 11.8% (2014-2018)

447.766 jobs

▼ 14.6% (2014-2018)

Countries of origin by projects

-  1 United States | 475 projects
-  2 Germany | 346 projects
-  3 Switzerland | 207 projects
-  4 Netherlands | 192 projects
-  5 United Kingdom | 179 projects

Destination countries by projects

-  1 United States | 381 projects
-  2 United Kingdom | 202 projects
-  3 Germany | 168 projects
-  4 Spain | 136 projects
-  5 France | 127 projects

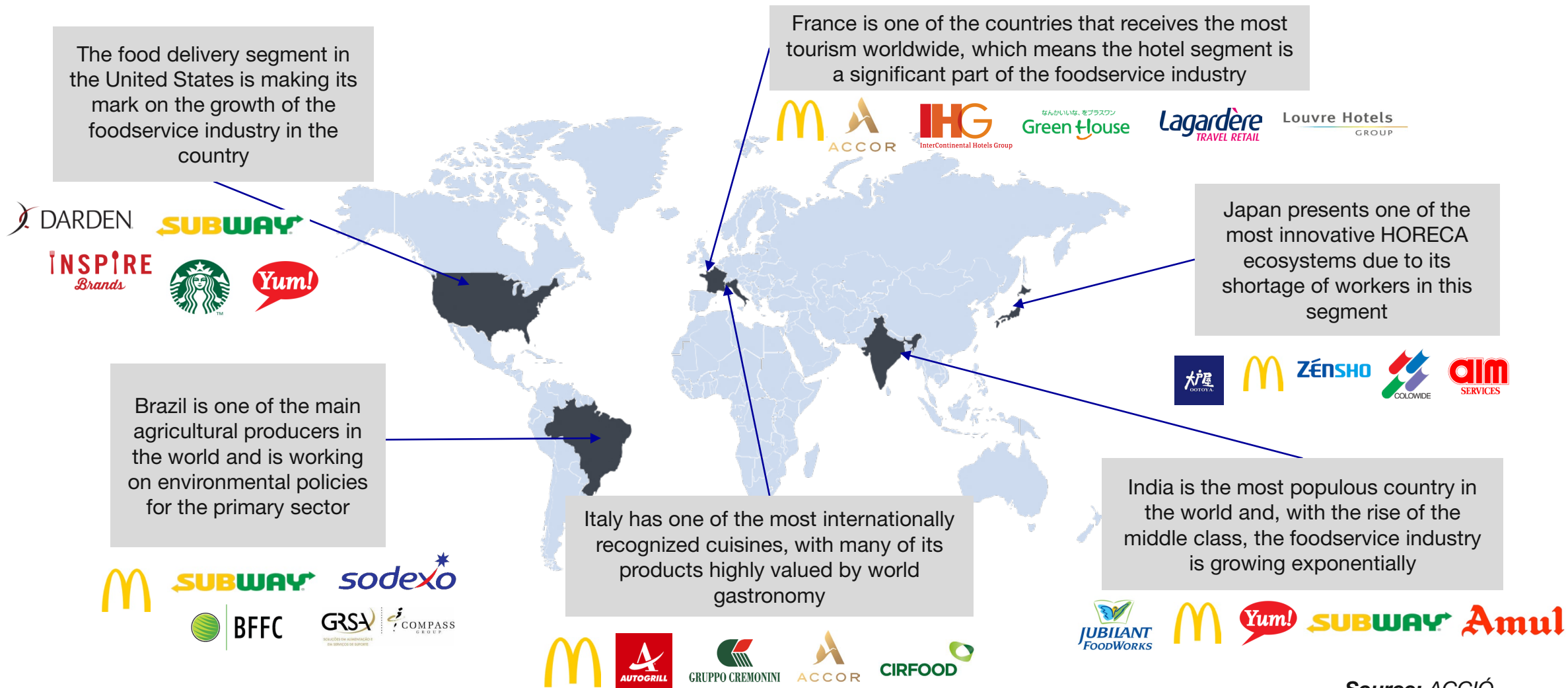
The 25 top investing companies in the period 2019-2023



Notes: Projects in the "food & beverages" sector between 2019 and 2023 have been considered.

Source: ACCIÓ, based on fDi Markets, 2023

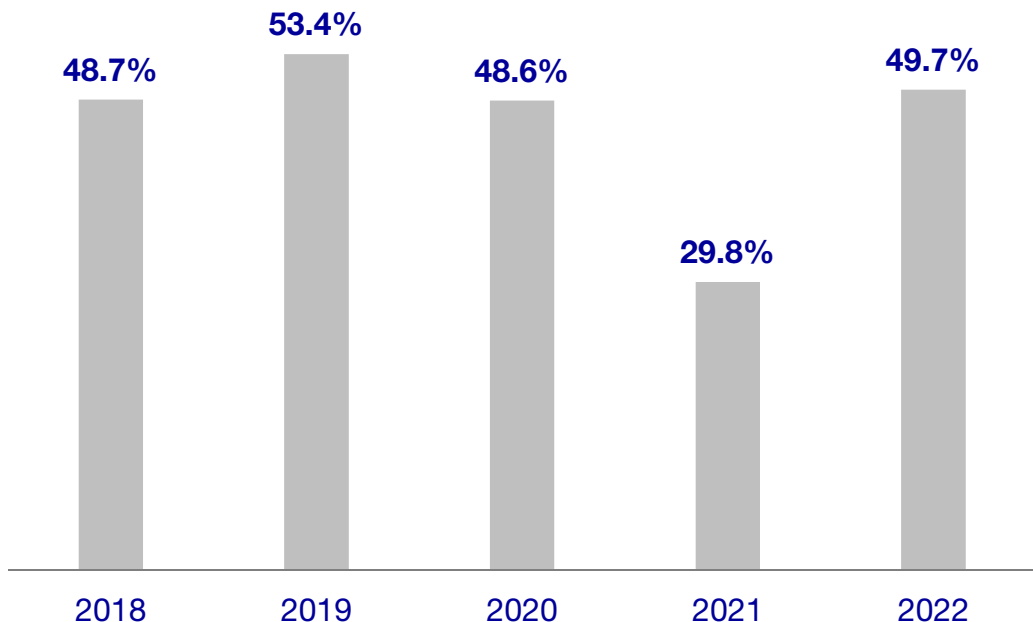
Countries of interest for the foodservice industry



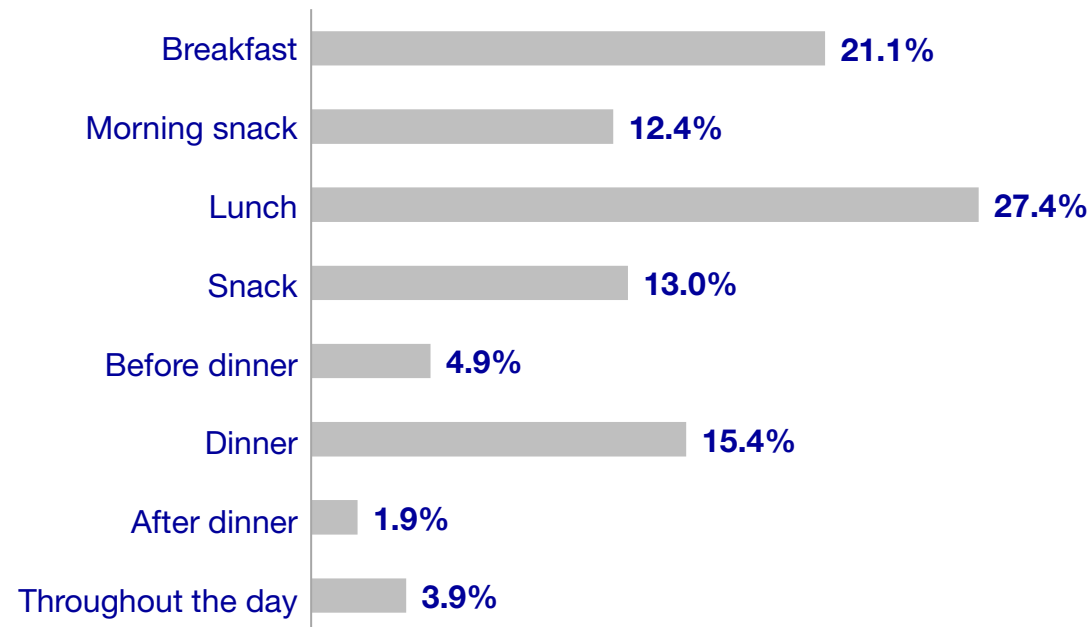
Half of Spaniards eat outside the home, especially at lunchtime

After falling to less than 30% in 2021, the percentage of Spanish respondents who eat out rose to nearly 50% in 2022. Lunch is the most popular meal for eating out in Spain: according to the survey, approximately 27% of food and beverage consumption outside the home occurred at this time of day.

Percentage of respondents who ate out in Spain, 2018-2022



Distribution of food and drink consumption outside the home in Spain by time of meal, 2022

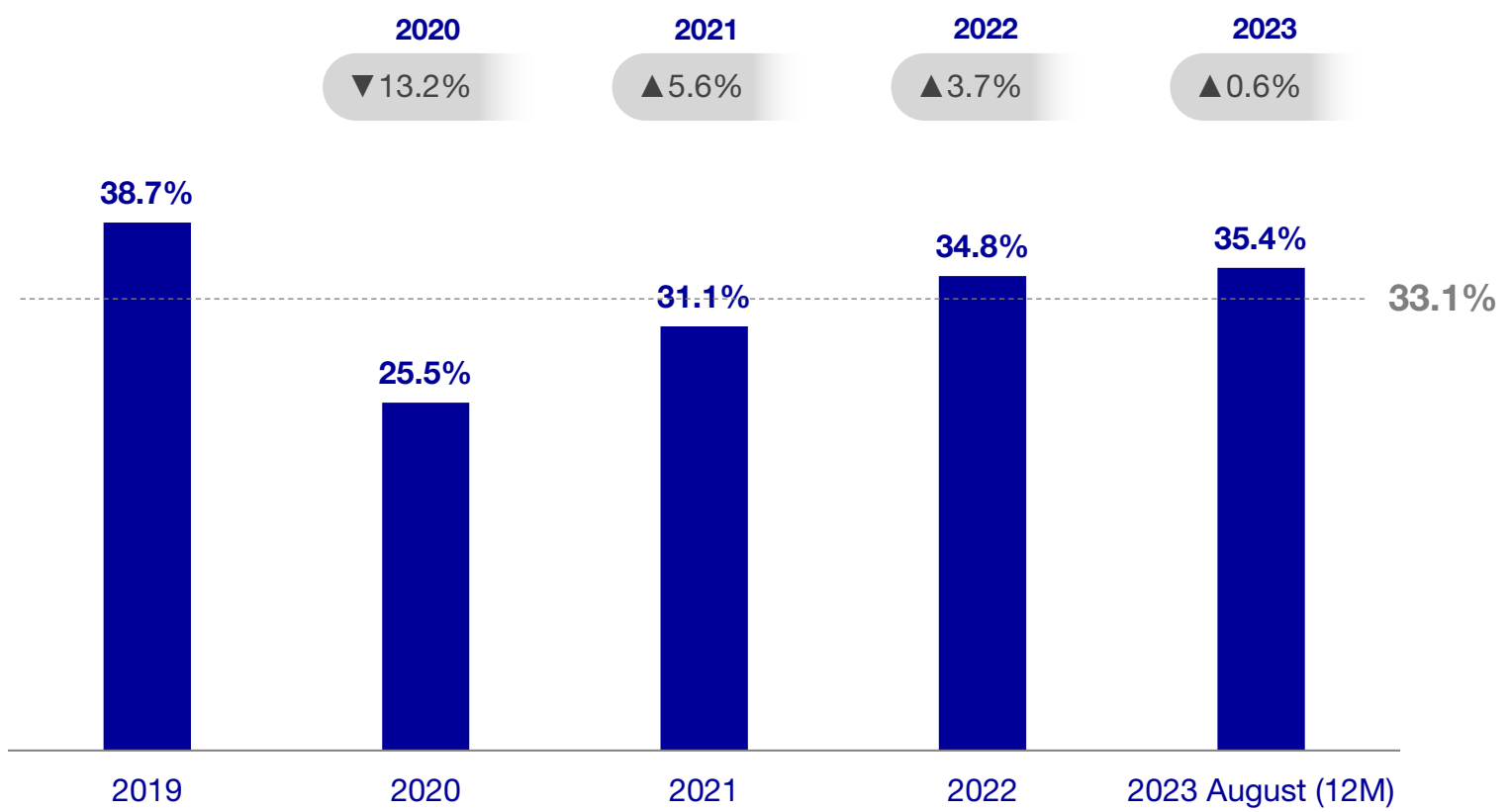


Source: ACCIÓ, based on Statista, 2023

Consumption In foodservice is recovering in Spain after the pandemic

According to the most recent data, consumption in foodservice reached a 35.4% share of the total expenditure made by Spaniards in the food and drink sector.

Consumption share in foodservice on the total expenditure made by Spaniards on food and drinks (foodservice + food retail)



Source: ACCIÓ from "Observatory of Branded Restaurant and Catering 2023", KPMG

2. The foodservice industry in Catalonia



The foodservice industry value chain

Agricultural production

Agriculture

Livestock

Fishing and aquaculture

Food and beverage industry

Food processing

Meat products

Milling

Fish and crustaceans

Bakery and pastries

Fruit and vegetables

Animal feed

Oils and fats

Drinks

Dairy

Auxiliary industry

Packaging

Chemicals

Machinery

Distribution

Transport and storage

Wholesaler

End customer

Commercial caterings

Traditional HORECA

Branded restaurant

Restaurant en route

Delivery & Takeaway

Vending

Catering for public facilities

Education

Health and geriatric

Canteen catering

Event catering

Penitentiaries

Armed forces

Cross-cutting

Certifiers and quality assurance

Platforms and clusters

Research centers and universities

Fairs

Services and consulting

Public Administration

Food safety laboratories and analyses

Key data of foodservice in Catalonia (I)



Note: Economic data from the last year available, mostly 2022.

Note: The mapping of Foodservice has been carried out based on CNAEs related to food and companies from other ACCIÓ reports and directories. Only companies with a turnover of more than €2 million per year have been considered, with the exception of those in the final channel, which are included if they have a figure of over €0.5 million. The economic data of the companies are calculated ad hoc based on their link with the industry.

Turnover of the foodservice industry

	Number of companies 2023	Volume of business 2022 (€M)	People in employment 2022 ¹⁶
Agricultural production	278 (4.8%)	1,088 (4.5%)	2,037 (1.7%)
Agriculture	51	244	719
Livestock	219	834	1,262
Fishing and aquaculture	8	10	56
Food and beverage industry	1,071 (18.6%)	11,735 (48.9%)	25,597 (22.0%)
Food processing	733	9,985	20,759
Meat products	206	3,289	7,595
Fish and crustaceans	13	25	125
Fruit and vegetables	24	214	633
Oils and fats	31	778	534
Dairy	25	434	782
Milling	16	310	267
Bakery and pastries	86	462	2,308
Animal feed	63	1,025	690
Drinks	102	1,279	2,343
Other	167	2,169	5,483
Auxiliary industry	338	1,750	4,838
Distribution	1,491 (25.9%)	5,743 (23.9%)	8,788 (7.5%)
Final Channel	2,908 (50.6%)	5,450 (22.7%)	80,102 (68.8 %)
Commercial catering	2,738 (47.6%)	4,403 (18.3%)	53,449 (45.9 %)
Restaurant	2,371	3,876	47,506
Bars, cafés and similar	284	290	3,824
Hotel groups	71	32	269
Other	12	205	1,851
Catering for public facilities	170 (2.9%)	1,047 (4.4%)	26,653 (22.9%)
TOTAL	5,748	24,017	116,524

Note: All segments include companies with a turnover of €2 million or more; the final channel, on the other hand, includes companies with a turnover of €0.5 million. **Source:** ACCIÓ

Key data of the foodservice industry in Catalonia

5,748 companies



- **91.1%** of the companies are small or medium-sized firms (turnover of less than €50 M).
- **68.8%** of the companies were founded more than 10 years ago.
- **32.2%** of the companies are exporters and **23.6%** are regular exporters.
- **4.8%** of the companies are foreign affiliates.

Territorial distribution



- **66.1% of the companies are located in the Barcelona area.**
- **67.6%** of the total revenue and **77.5%** of the total number of people employed in the industry come from companies in the province of Barcelona.
- The counties of **Barcelonès, Vallès Occidental, Baix Llobregat, Maresme and Segrià** are those with the most companies related to the foodservice industry.

Turnover: €24,017 billion



- The turnover is equivalent to **8.9% of Catalonia's total GDP.**
- **Large companies** (4.5% of the total number of companies) invoice **59.7%** of the industry's total turnover.

116,524 jobs



- **79.7%** work in **consolidated companies** (10 years or more).
- **34.8%** work in **large companies** (more than 50 employees).

The foodservice industry value chain (I)

Agricultural production

Agriculture



Livestock



Fishing and aquaculture



Food and beverage industry

Food processing



Auxiliary industry

Packaging



Machinery



Chemicals



Distribution



Note: partial representation with the aim of illustrating the suppliers of the value chain of the foodservice sector in Catalonia, although there may be other companies that have not been included in the study. **Note:** each company has been assigned to a main category of the value chain. **Source:** ACCIÓ

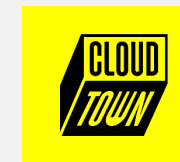
The foodservice industry value chain (II)

Startups

Food and beverage industry



Distribution and end customer



Note: partial representation with the aim of illustrating the suppliers of the value chain of the foodservice sector in Catalonia, although there may be other companies that have not been included in the study. **Note:** each company has been assigned to a main category of the value chain. **Source:** ACCIÓ

The foodservice industry value chain (III)

Distribution

Specialized logistics (transport and storage)



Wholesaler



Note: partial representation with the aim of illustrating the suppliers of the value chain of the foodservice sector in Catalonia, although there may be other companies that have not been included in the study. **Note:** each company has been assigned to a main category of the value chain. **Source:** ACCIÓ

The foodservice industry value chain (IV)

Final channel - Commercial catering

Traditional HORECA



Coffee shops



Restaurant en route



Delivery & Takeaway



Vending



Branded restaurant



Note: partial representation with the aim of illustrating the suppliers of the value chain of the foodservice sector in Catalonia, although there may be other companies that have not been included in the study. **Note:** each company has been assigned to a main category of the value chain. **Source:** ACCIÓ

The foodservice industry value chain (V)

Final channel - Catering for public facilities

Education



Healthcare



Retirement and nursing homes



Companies



Event catering



Note: partial representation with the aim of illustrating the suppliers of the value chain of the foodservice sector in Catalonia, although there may be other companies that have not been included in the study. **Note:** each company has been assigned to a category in the value chain but may sell in more than one channel within social catering. **Source:** ACCIÓ

The foodservice industry ecosystem in Catalonia

Business associations foodservice



Clusters accredited by ACCIÓ



Fairs



TECNIO technological centers



Specialized centers in the food and beverage sector



Specialized centers in the wine and Cava segment



Catalan university centers that provide education related to the foodservice industry



Public instruments of the Government of Catalonia for sectoral promotion and dissemination



Public instruments for sectoral promotion and dissemination

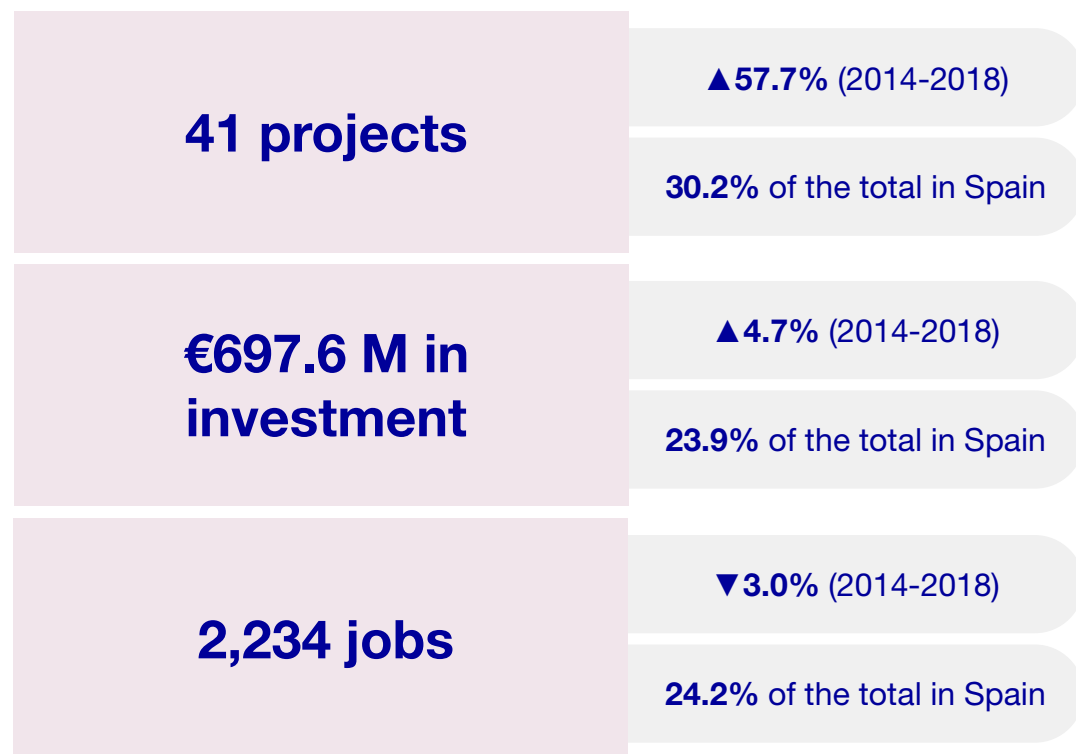


Private instruments for sectoral promotion and dissemination













Note: Partial representation with the aim of illustrating the ecosystem of the foodservice sector in Catalonia. **Source:** ACCIÓ

Catalonia records €700 M of FDI in food and beverages between 2019 and 2023



Countries of origin by projects, 2019-2023

- | | |
|--|---|
|  1 Germany 11 projects |  6 Italy 2 projects |
|  2 France 6 projects |  7 Argentina 1 project |
|  3 Belgium 5 projects |  8 Greece 1 project |
|  4 United States 4 projects |  9 Iceland 1 project |
|  5 Switzerland 3 projects |  10 Ireland 1 project |

The 20 top investing companies in the period 2019-2023



Notes: Projects in the "food & beverages" sector between 2019 and 2023 have been considered.

Source: ACCIÓ, based on fDi Markets, 2024

Catalonia is the 5th-ranked region in the EU in terms of the number of FDI projects in food and beverages

In the 2019-2023 five-year period, Catalonia occupied a noteworthy position in the European Union for FDI in food and beverages. It's the **fifth-ranked region as regards the number of projects**, the **eighth-ranked for invested capital** and the **fifth-ranked for jobs created**.



5th-ranked region in number of projects

(▲2, 2014-2018) **4.6%** of the EU total



8th-ranked region in terms of invested capital

(▲2, 2014-2018) **3.3%** of the EU total



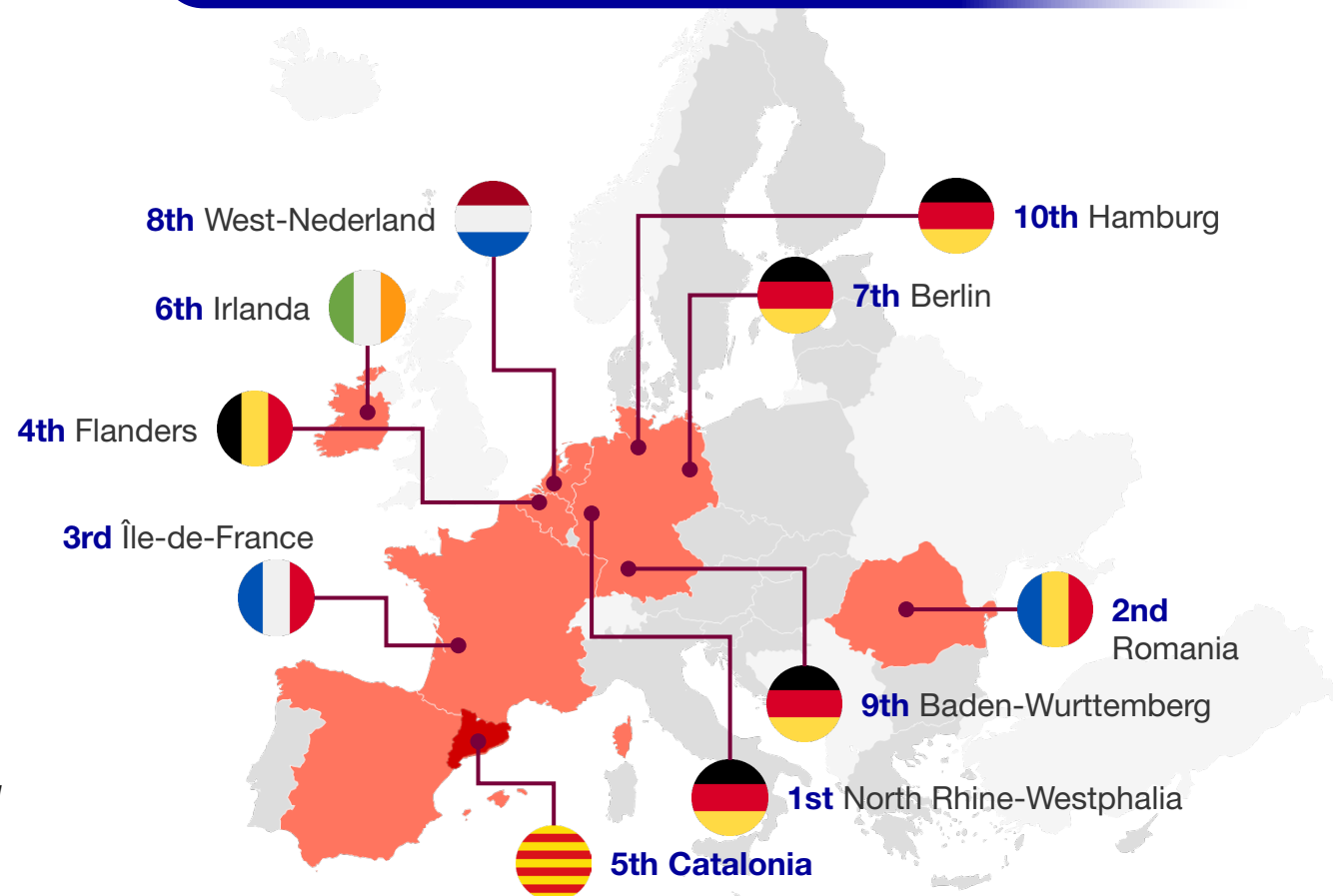
5th region in jobs generated

(▲2, 2014-2018) **3.1%** of the EU total

Notes: Projects in the "food & beverages" sector between 2019 and 2023 have been considered.

Source: ACCIÓ, based on fDi Markets, 2024

FDI in the EU (by projects), 2019-2023



Success stories from the foodservice sector

Challenge

Solution



Each country has its own cultural, gastronomic and social characteristics, which is why at **Areas** they adapt their offer to suit the preferences of each local market.

Their philosophy is best summed up as a "GLOCAL" company: they value and leverage the power of the local level, while bringing the strength and experience of their own brands, as well as those of established and recognized brands in each country.



Mahou San Miguel has launched a Global Hospitality Transformation Plan in 2022. Within this ambitious transformation plan, RENTABILIBAR is one of the key axes focused on contributing to boosting digitalization.

RENTABILIBAR is designed to bring value to all stages of the hotelier's life cycle, offering them tools, data and the knowledge they need for their business. In addition, it is constantly being updated to meet changing needs.



Serhs food, with a more modest dimension, wants to compete face to face with the large multinational leaders in a sector where the volume of business and the critical mass is key, given the relevance of the economy of scale in this market. And do it in a way that is attractive, reliable and economically viable.

SERHS Food offers a solution very focused on the individual satisfaction of each user. Based on its own very innovative and scalable know-how with objective improvements that favor environmental sustainability and work-life balance. Having as fundamental pillars the nutritional quality, very specialized in food based on cultural respect and the health benefit of each person

3. Business challenges, trends and opportunities



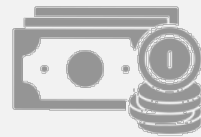
Consumer trends

Consumer of experiences



Bolstered by the heavy use of social media, the number of consumers opting for dining options that offer differentiated experiences not necessarily related to food has greatly increased.

Consumer based on price



Due to the ripple effect of the economic slowdown and rising inflation, many consumers are looking for deals and promotional prices and are more interested in white goods.

Healthy and conscious consumer



The search continues for well-being without sacrificing quality or taste. Consumption of food supplements such as vitamin C, omega 3 and zinc increases among older age groups.

Gourmet consumer



The laboratory kitchen with the launch of new Premium products, the search for novelty, constant innovation, design, packaging, store location and in-store experience (omnichannel) is a marked consumer trend.

State-funded consumer



The majority of consumers focus part of their social relationships on social meals, making their social experience at the restaurants and bars they visit a focal point when deciding where to go.

The technologies involved in the foodservice industry

DIGITAL SOCIETY

- *IoT and sensors*
- *Connectivity*
- *Big Data + AI*
- *Photonics/Quantum*
- *DLT/Blockchain*
- *New Space*
- *Cybersecurity*
- *E-commerce*

HEALTH

- *Functional food*
- *Ohmics*

GREEN TRANSFORMATION

- *Agritech*
- *Foodtech*
- *Blue Economy*
- *Bio Economy*
- *Nature-Based Solutions*
- *Recycling and recovery*
- *Water cycle technologies*

INDUSTRIAL RESILIENCE

- *Robots/Cobots*
- *Chemical recycling*
- *Additive manufacturing*
- *Sustainable materials*
- *Simulation*
- *Frontier materials*
- *Automation*
- *Drones*

Market trends (I)

HEALTHY AND SUSTAINABLE FOOD

Plant-based:

Trends in food from plant sources.



Restaurant bases the choice of its menu on sustainable and plant-based options and engages with innovative aspects such as gastrobotany or new pairing styles of luxury kombucha-based menus, *tepaches* and vinified vegetables.

Non-alcoholic beverages:

Decrease in the consumption of alcoholic beverages, new consumption.



Developing non-alcoholic alternatives with flavor profiles that rival their alcoholic counterparts, adding a more complex and appetizing dimension to this emerging market.

Water consumption:

Reduction in the use and exploitation of water.



New management plan and sustainable use of water in the dining room aims to reduce water consumption and the use of containers, saving the hospital an average of 72,540 single-use plastic containers each year.

Gluten-free fast food:

Offer of gluten-free meals in fast food restaurants.



Association for the dissemination of celiac disease, creator of the *Celicity* School, an online platform specializing in courses, which has an application for mobile devices to locate gluten-free restaurants in Spain.

Market trends (II)

NEW OPTIONS FOR THE RESTAURANT TRADE

Themed restaurants: New restaurant designs based on innovative concepts and current trends.



Themed restaurant: a collaboration between Nintendo, Universal Studios Hollywood and Universal Studios Japan, has created a menu inspired by the universe of Mario Bros.

Food court:

Reduction in the use and exploitation of water.

eat
street

Company that organizes and collaborates in outdoor gastronomic events in Barcelona. Its strategy is to bring together local chefs and international cuisine, constantly experimenting with new and creative ways to promote its events.

Fast Casual: Restaurant options that offer high-quality fast food.



Hamburger that offers products based on combining the speed of fast food with the quality and variety of casual dining and the evolution of catering technologies, which allow processes to be automated and provide a better customer experience.

Experience beyond the meal: Offer customers experiences where the value proposition is not just the food.



Inside Europa Park, in Germany, Eatrenalin is a restaurant concept that awakens all the senses and triggers emotions. Eatrenalin completely redefines the culinary experience, combining gustatory, olfactory, physical and audiovisual elements.

Source: ACCIÓ

Market trends (III)

RESTAURANT TRADE 4.0

Robotics and automation:

Appearance of robots in the room and kitchen service of a restaurant as well as platforms and software that automate management tasks.



Br5 and Mimcook. They have created the world's first "robotic pan" made entirely by a robot, combining the technology of collaborative robots with the standardization of temperatures and cooking times.

Data Quality:

Data collection and analysis tools that allow traceability of the foodservice industry value chain.



Complements kitchens with the Andy digital assistant. This guarantees that their poke bowls, in addition to their high quality, assure the highest food safety by digitizing, standardizing and centralizing all the related protocols.

Digital restaurant:

Trend of digitizing restaurant menus or other traditionally non-digital aspects of the catering offering.



It will leverage digital menu media to be able to offer dynamic prices in their establishments. Some of the benefits of implementing this system are: real-time updates, interactive features, data collection, reduced costs, etc.

Market trends (IV)

EXCLUSIVENESS

Dining and fashion:

Collaborations between clothing brands and restaurant franchises.

GUCCI
OSTERIA
da Massimo Bottura

The restaurant is located in one of the side rooms of their boutique store and offers fresh Italian-inspired cuisine by chef Massimo Bottura, owner of Osteria Franceseana restaurant. Its success is based on a combination of high-quality gastronomy, an elegant and sophisticated atmosphere and a unique and memorable experience, offering a unique and attractive dining experience.

Temporary meals:

Temporary offering of exclusive meals in collaboration with music groups or television series for joint promotions.



Partnered with Universal Music Group Korea to celebrate the release of Sam Smith's new album. Coinciding with Valentine's Day, and for a limited time, the brand's baristas were inspired by his music and creativity to create some special drinks named after some of the songs released on the new album.

Private Chef:

Hiring private chefs who cook personalized menus directly at the diners' homes.

takeachef

It offers a wide range of dining options, from traditional to international cuisine where customers can choose from different types of menus, including personalized, vegetarian or vegan menus. The prices are competitive and the chefs are experienced professionals.

Source: ACCIÓ

Market trends (V)

360° RELATIONSHIP WITH CUSTOMERS

Co-creation:

Establishment of systems in which end consumers can participate in the creative process of our company.



A space that allows co-creation in a gastronomic space among the main agents of this ecosystem: the HORECA sector, startups, industrial sector and final consumers. This space has an experimentation laboratory, where technological solutions can also be developed and tested in a real environment.

Inclusive catering:

Catering offerings for groups at risk of social exclusion.



Thanks to the job opportunities in the restaurant and catering sector, the AMAS Foundation promotes the inclusion of people with different degrees of disability in bars and restaurants such as [Gallinas y Focas \(Hens and Seals\)](#) in Madrid or INOUT in Barcelona and in in-house catering services.

Creating communities:

Platforms on which customer communities are generated with a high degree of loyalty and two-way communication channels.



The Run Run Run initiative stands out for the excellence of its gastronomic offerings, focused on providing healthy cuisine through dishes inspired by the concept of Clean Eating. Their commitment to transparency and community engagement also gives it an educational and informative approach, where consumers seek experiences that go beyond mere gastronomy.

Source: ACCIÓ

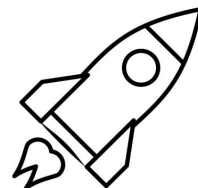
Main business challenges and opportunities for Catalan companies in the foodservice industry (I)

MARKET AND CONSUMPTION



MAIN STRATEGIC CHALLENGES

- Difference in habits among final consumers, **high segmentation and diversification**.
- **End-customer loyalty**.
- **Lack of staff** in catering and **absenteeism**.
- Rising **prices of raw materials**.
- **Little public-private partnership**.
- **Unification of purchase criteria** of public authorities in catering for public facilities.



MAIN OPPORTUNITIES

- **New market niches** are emerging in terms of **high protein and plant-based products**. It's a good time to explore new niches and develop new products.
- Partnerships with public entities can facilitate skills building and training programs to develop staff's digital skills. These alliances can also facilitate the implementation of more accessible and effective omnichannel solutions, while improving the customer experience.
- **Difference in consumer habits** presents an **opportunity** to target a specific consumer **group** that is **not already covered**.

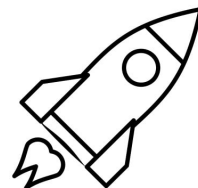
Main business challenges and opportunities for Catalan companies in the foodservice industry (II)

HEALTH



MAIN STRATEGIC CHALLENGES

- The convenience store segment is declining and **convenience stores** with less fresh produce are proliferating, causing a loss of the Mediterranean diet and growing the treat-yourself segment.
- **Caffeine consumption** in **young** segments is **growing**.
- The **tendency to osmosis in the HORECA segment** can lead to a **less exhaustive control of food quality**.
- **Nutrition**, despite being a pillar of health, **still does not play a significant** role in the discussion in the food sector.

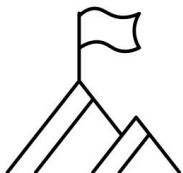


MAIN OPPORTUNITIES

- Opportunity to raise awareness through food and to provide healthy food and pass on good practices to customers.

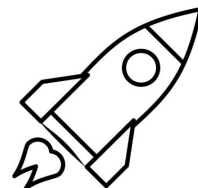
Main business challenges and opportunities for Catalan companies in the foodservice industry (III)

SUSTAINABILITY AND CLIMATE CHANGE



MAIN STRATEGIC CHALLENGES

- It is **not possible to meet all the demand for local and organic products** due to a lack of supply.
- Most **products are not eco-designed**.
- Promote the **responsible use of plastic** in certain uses.
- **Avoid food waste**.
- The lower supply by local product supplier leads to an **increase in logistics and pollution**.
- **There is not enough supply of recycled PET** to meet demand.



MAIN OPPORTUNITIES

- Collaboration between businesses and local producers can help provide more personalized products and services, tailored to individual consumer needs and the availability of local ingredients
- **Strategies that link the supply of local products with the reduction of food waste and the implementation of more efficient logistics systems for local products**, while minimizing transport and storage time to reduce expirations and thus reduce the pollution associated with logistics.
- **Sustainability strategies to control operating costs by reducing the waste of raw materials**. Automation and digitalization of processes can improve operational efficiency, reduce costs and enable more effective management of resources.

Source: ACCIÓ

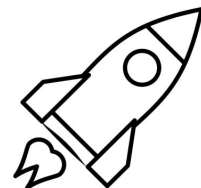
Main business challenges and opportunities for Catalan companies in the foodservice industry(IV)

TECHNOLOGY AND DIGITALIZATION



MAIN STRATEGIC CHALLENGES

- **Interconnection of computer systems.**
- **Recruitment and training** of staff with **digital profiles.**
- Order aggregation **platforms control most of the data in the industry.**
- Currently, **there is no** aggregate consumption **data** that are **representative of the market.**



MAIN OPPORTUNITIES

- The flexibility of **remote work** offers an opportunity to delocalize company teams. **Care** must be taken, however, to generate **good cohesion** and establish **digital disconnection policies.**
- **Use insights** collected from social networks and other databases on **customer preferences** to develop **new products** that meet the specific needs of consumers.
- **Invest in technology to be more efficient and minimize the shortage of human resources** and problems of price increases in raw materials.
- **Segment customers based on preferences and consumption habits** to identify geographic areas with similar demand, facilitating **focused expansion into new locations.**
- **Incorporation of generative AI to improve productivity**

Source: ACCIÓ.

Thank you

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More information about the sector and related news:
<https://catalonia.com/key-industries-technologies/food-beverage/foodservice-industry-in-catalonia>

