



# Food and drinks in Catalonia

April 2018

**Sector Snapshot**

## Food and drinks in Catalonia: Sector Snapshot

**ACCIÓ**  
Government of Catalonia



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Barcelona, April 2018

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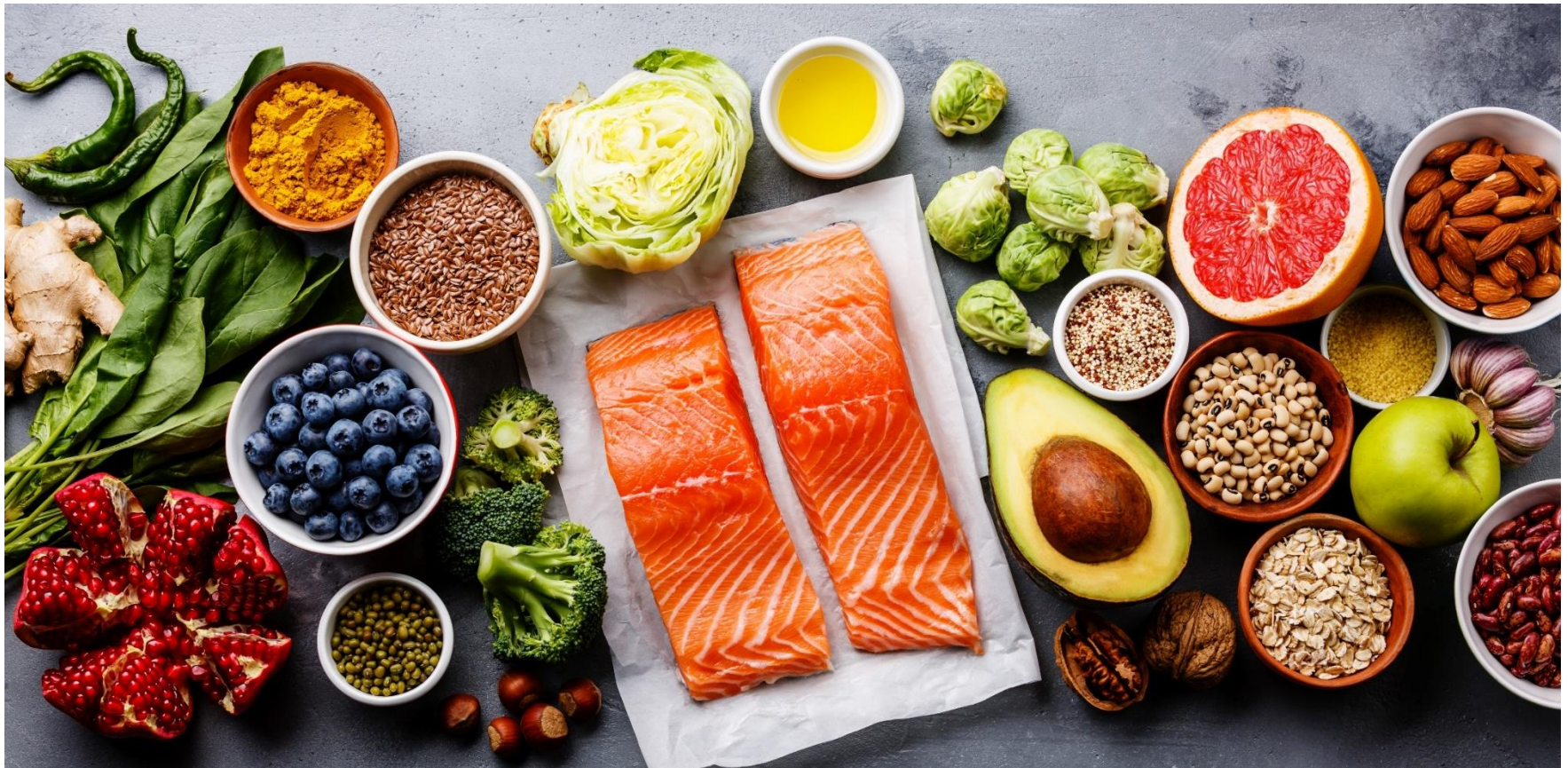
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# 1. The food and drink industry



# Food and drink industry description

## Food and drink value chain

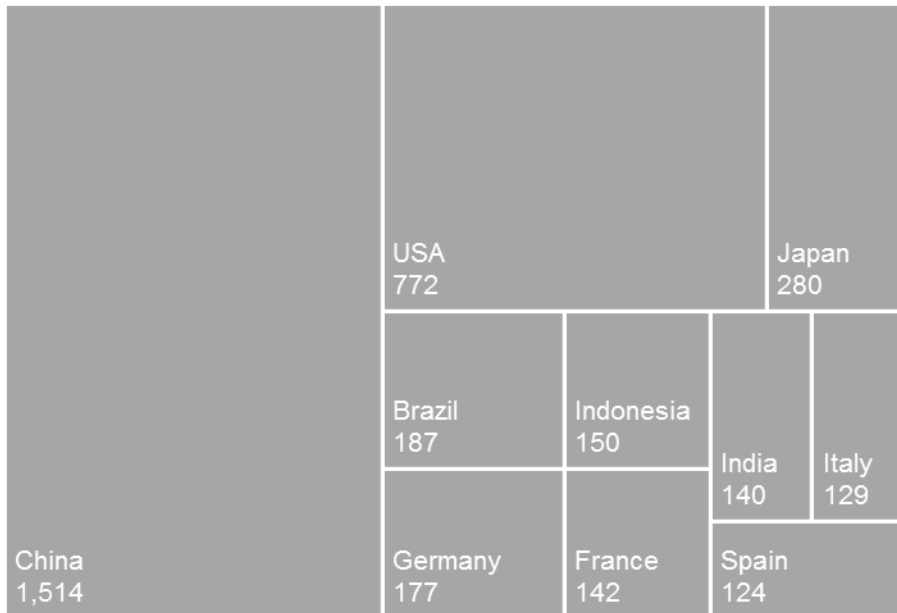


The food and drink industry encompasses the entire value chain, from the raw materials and equipment suppliers, through the network of stakeholders involved in developing, producing, processing, packaging, distributing and selling food and beverages, and on to the final consumers.

Source: Own elaboration.

# The global food and drink industry

## Main global countries by production value in € billion (2016)



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## The food and drink industry in the world



**€5,633 bn**  
Global Turnover  
(2016)



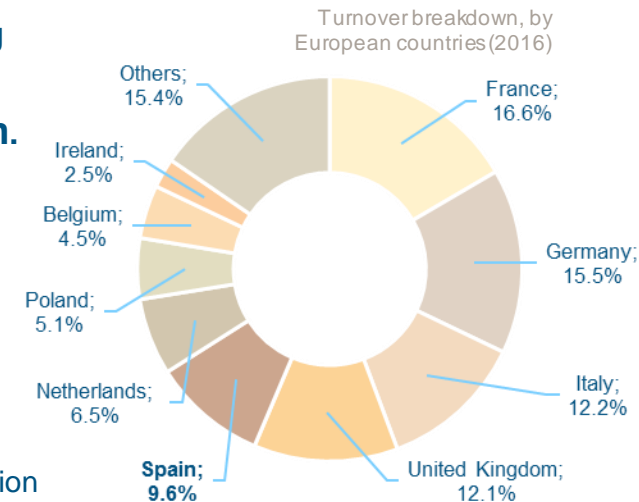
**7.2% growth**  
Global CAGR between  
2016-20

10 companies control most of the global production:



## The food and drink industry in Europe

- Largest manufacturing sector.
- Turnover of **€1.098 bn.**
- **17.3%** share of global exports.
- **EU-28** is the **first exporter** of food and drink products in the world.
- **Spain** holds the **5th position** by turnover.



Source: Euromonitor, Oxfam International, Behind the Brands, FoodDrinkEurope, Data & Trends of the European Food and Drink Industry 2017.



# 2. The food and drink industry in Catalonia



# Food and drink industry in Catalonia

The food and drink industry is the Catalan economy's **largest industrial sector**. Led by meat industries, this sector is highly developed thanks to a thriving ecosystem and the presence of the entire value chain. The Catalan food and drink industry **is well positioned internationally** due to its unique gastronomy, featuring renowned products as wine, cava or olive oil.



**2,701**  
COMPANIES  
(2017)



**79,802**  
EMPLOYEES  
(2015)



**€26,000 M**  
TURNOVER  
(2015)

○ **11.9%** of Catalan industrial companies.

○ **12.4%** of all food and drink companies in **Spain**.

○ **Bakery and farinaceous** products hold the biggest number of companies (**23.7%**).

○ The number of jobs represents **18% of total industrial workers** in Catalonia.

○ **22%** of whole sector employment in **Spain**.

○ The number of employees **increased to 6.9%** between 2011 and 2015.

○ **Meat industries** lead the sector by number of employees (**41%**).

○ Leading sector in Catalonia, as represents **19.7% of industrial turnover**.

○ **23.9%** of whole sector turnover in **Spain**.

○ Turnover **increased to 8.9%** between 2011 and 2015.

○ **Meat industries** lead the sector by turnover (**31%**).



# Catalan food and drink industry competitiveness (I)

## Attractive for foreign investors

From 2013 to 2017...

THE CATALAN FOOD AND DRINK INDUSTRY REGISTERED...



**27** FDI projects



**€626.5 M** of capital investment



**2,459** jobs created

CATALONIA HAS BEEN THE TOP FOOD AND DRINK FDI DESTINATION IN SPAIN, REPRESENTING...



**31%** of the FDI projects received



**34.4%** of the capital investment



**37.6%** of the jobs created

...within the food and drink industry in Spain.

CATALONIA HAS ALSO BEEN THE...



**4th** region in terms of job creation



**5th** region in number of FDI projects attracted



**7th** region in capital invested received

...within the food and drink industry in Western Europe.

# Catalan food and drink industry competitiveness (II)

## International and open trade

Over the last decade...

CATALONIA FOOD AND DRINK INDUSTRY EXPORTS HAVE REPRESENTED...



**28.5%** of Spanish food and drink exports

**11.3%** over total Catalan exports

THE MAIN EXPORTING SUBSECTORS HAVE BEEN...



Meat products  
**(39.0%)**



Manufacture of beverage  
**(12.9%)**



Vegetable and animal oils and fats  
**(10.8%)**

MAIN COMMERCIAL PARTNERS (2017)



**France, Italy and Portugal**, in terms of exports



**France, Germany and Italy**, in terms of imports

Source: ICEX.

# Catalan food and drink industry competitiveness (III)

## Innovative and entrepreneurial

Catalonia is at the forefront of innovation...

- **1.46%** of its GDP dedicated to R&D.
- **9,282** innovative companies, representing **22.2%** of the Spanish total.
- ACCIÓ, Winning Agency for **Best R&D Support** (*FDI Strategy Awards, 2017*).
- **36 technological** centres related to the food and drink industry with **TECNIO** accreditation.
- **Clusters and associations** of the food and drink industry and related sectors.

### LEADING TECHNOLOGICAL CENTERS

- **Eurecat** is a key player in the Catalan innovative ecosystem as the leader in industrial research.
- **Alicia Foundation** is a research centre devoted to technological innovation in cuisine, the improvement of eating habits and the evaluation of the food and gastronomic heritage.

### BARCELONA..

5th

City in Europe in terms of innovation  
(*Innovation Cities Index, 2016/2017*)

5th

City in Europe in terms of scientific academic production  
(*Knowledge Cities Ranking, CPVS, UPC, 2017*)

# Catalonia, the ideal place for the food and drink industry



## STRATEGIC LOCATION AND MARKET ACCESS

Catalonia's strategic location gives it access to major food and drink markets in Europe and the Mediterranean, as well as its function as a gateway to Latin American markets.

Catalonia counts on excellent infrastructures, including two ports specialized in food and drinks, motorways linked to the European network, trains and an international airport.



## AVANT-GARDE GASTRONOMY

Catalonia and its cuisine, thanks to the most avant-garde creativity, hold a prestigious international position, attracting visitors from the four corners of the globe.

This universal acclaim has been achieved thanks to many famed chefs being awarded Michelin stars and other accolades by prestigious guides, who are undoubtedly the foremost exponents of contemporary Catalan cuisine.



## FOOD AND DRINK BUSINESS STRUCTURE

With the presence of the entire value chain for the food and drink industry, Catalonia is chosen by many leading companies, such as Nestle or Unilever.

Catalonia is home to clusters and associations that enrich and invigorate this ecosystem.



## TRADE FAIRS & CONGRESSES

Barcelona ranks 3rd in the world city International Congresses ranking, only behind Berlin and Paris (ICCA, 2016).

Catalonia hosts international food and drink events, such as Alimentaria and FoodTech, as well as related sector events, such as Hostelco and Hispack.



## LEADING SCIENTIFIC FACILITIES

Catalan leading scientific facilities, research and technological centres are working at many levels of the food and drink industry value chain, from additives and raw materials, through packaging and manufacturing technologies, and on to nutrition and health (EURECAT, ALICIA FOUNDATION).



## COMPETITIVE TALENT

Besides its thriving economy for businesses, Catalonia offers quality of life, a cosmopolitan atmosphere and top-notch professionals from all over the world.



## BUSINESS MINDSET

Catalonia is always open for business, with the government's business focused policies perfectly complementing and supporting a strong private sector.



# The extensive value chain of the food and drink industry in Catalonia

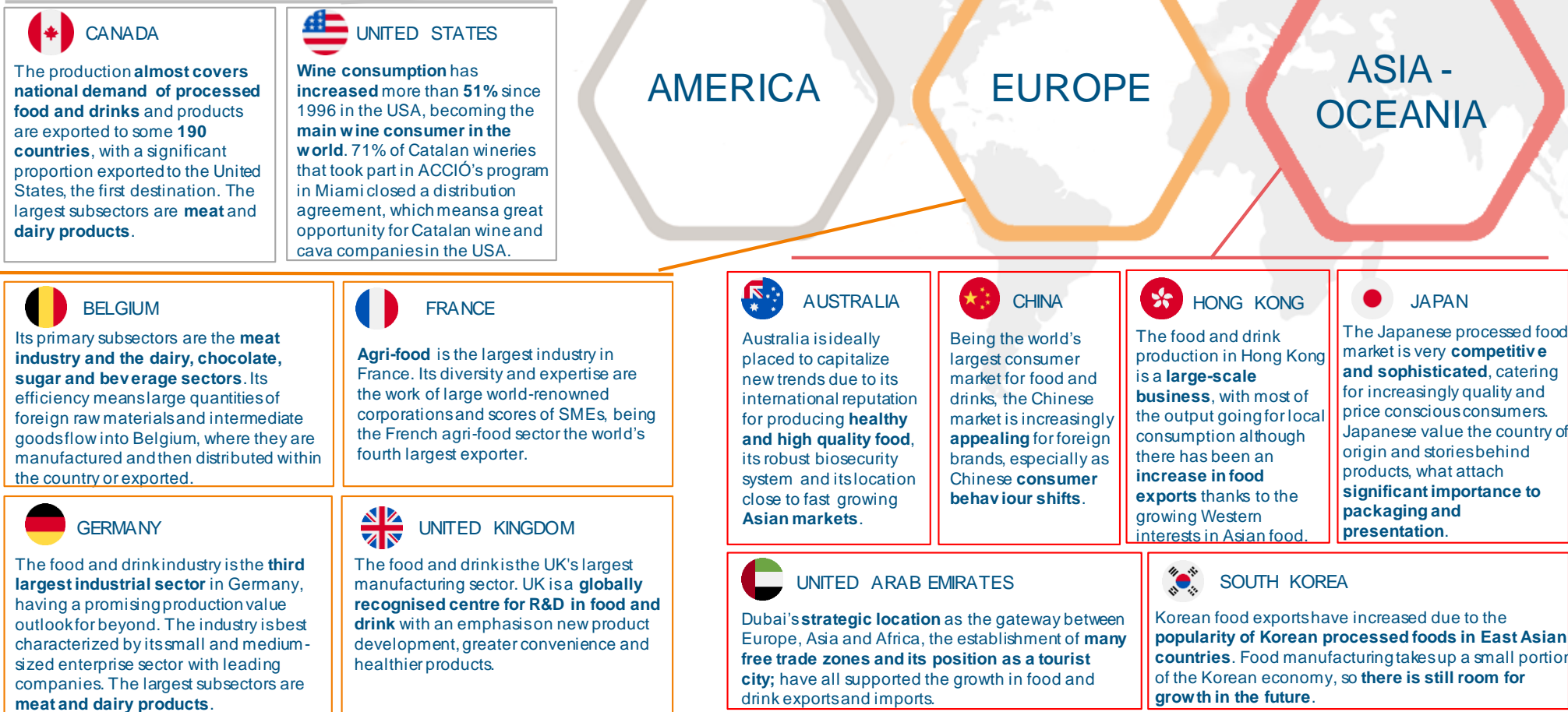


Note: The use of these trademarks is for informative purposes only. Trademarks mentioned in this document are the registered trademarks of the companies to which they belong and are not owned by ACCIÓ. This is a partial and illustrative representation of companies that form part of the food and drink ecosystem in Catalonia; however, there may exist other companies that have not been included in the study.

# 3. Opportunities in the food and drink industry



# International market opportunities for Catalan companies



Source: ACCIÓ.



# Opportunities for foreign companies

## THE FOOD AND DRINK VALUE CHAIN



### Animal feed & Compounding

Catalonia is one of Europe's main meat regions, guaranteeing an important domestic market and a **place to find the main value chain actors.**



### Food manufacturing

The presence of a strong industry and research centres make Catalonia the ideal place to face new challenges.



### Food logistics

Catalonia is the best place to establish a food and drinks distribution centre thanks to its unique location.



### Food packaging

**71%** of the Catalan packaging companies produce for the food and drink industry **are internationally recognized.**



### Foodservice

A cuisine elevated to the forefront of international gastronomy and a cosmopolitan population open to the latest trends.



### Food waste management

Catalonia is home to an industry and population increasingly aware of the importance of reducing, donating or refocusing food.

## FOOD AND DRINK TRENDS



### "Free from" products

There is an increasing demand of mainstream "free from" products and centres and companies able to develop healthier, nutritious and tasty food options..



### Gourmet Gastronomy

Catalonia has the talent and means to improve production processes in order to standardize gourmet tastes and characteristics at a lower cost level.



### Healthy food and drinks

Catalonia has a thriving ecosystem filled with companies, research centres and talented professionals ready to formulate healthy and sustainable food.



### Ready-made meals

Catalonia combines its strong food industry with a global need for shortcut solutions that are still fresh, nutritious and customizable.

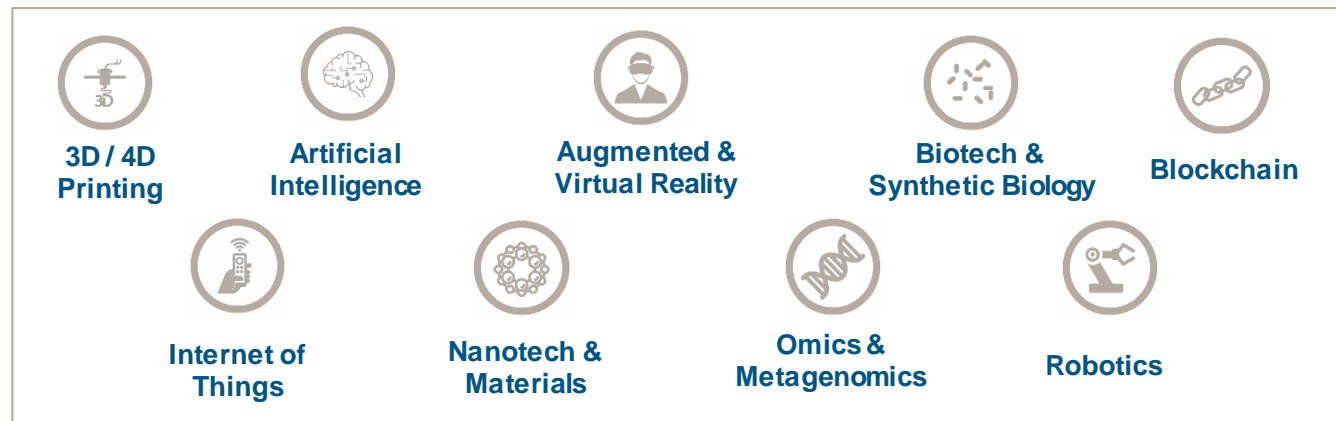


# Technological opportunities in Catalonia



**Evolving of disruptive technologies**

The evolving landscape of disruptive technologies is creating new business models and changing the way traditional sectors work, with **several breaking technologies identified by ACCIÓ as the main drivers of the future evolution and disruption.** **Food and drinks** is an industry where many of these breaking technologies **are expected to be applicable and drive to dramatic changes.**





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### Take a look the full report:

<http://catalonia.com/.content/documents/food-and-drinks-in-catalonia.pdf>



### More information about the sector and related news:

<http://catalonia.com/trade-with-catalonia/food-drink.jsp>



For more information:  
<http://catalonia.com/en/trade-with-catalonia/food-drink.jsp>