

March 2024. A snapshot of the industry

# The agri-food industry in Catalonia

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**ACCIÓ**  
Government of Catalonia



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**Carried out by**

Strategy and Competitive Intelligence Unit of ACCIÓ  
PRODECA Knowledge and Strategy Area

Barcelona, March 2024

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1. The agri-food industry globally
2. The agri-food industry in Catalonia
3. Trends and technologies related to the agri-food industry





## Definition of the agri-food industry

Group of companies that are in charge of agriculture, manufacture, distribution and sale of food and beverages for consumption inside or outside the home.



### Agricultural production

Agricultural production companies are those that are dedicated to obtaining food or raw materials from plants, animals or fish.



### Food processing

Companies that undertake the transformation of products that come from the primary sector and other suppliers of ingredients and additives to products ready for distribution to wholesale companies or directly to retailers.



### Auxiliary industry

Auxiliary food processing companies that offer complementary services or products to such as food industry machinery, *packaging*, chemicals, among others.



### Distribution

Companies that enable the transport, storage and distribution of products made by food processing companies to the final consumption channel.



### Final channel

**Foodservice:** this is the set of companies and organizations that are responsible for the preparation, distribution and sale of food and beverages for immediate consumption **outside** the home.

**Foodretail:** This is the set of companies and organizations that are responsible for the preparation, distribution and sale of food and beverages for immediate consumption **within** the household.

The agri-food industry in Catalonia

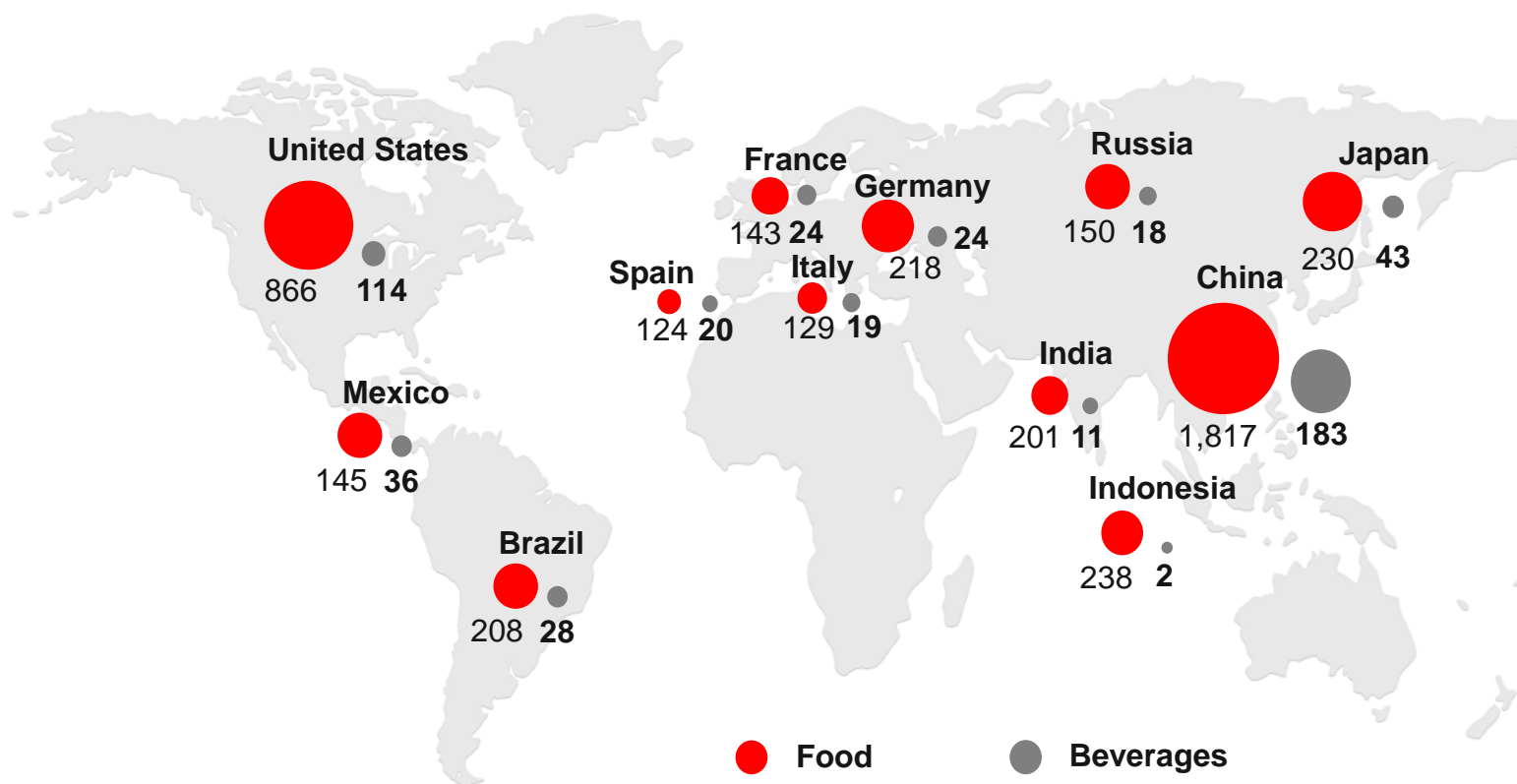
# 1. The agri-food industry globally



## The global agri-food industry

- Global agri-food production was valued at **€7.5 billion** in 2022. It is expected to exceed €14 billion by 2030.
- China is the leading producer of the global agri-food industry**, with 26.7% of the world's production value in 2022, higher than the production value of the next five countries combined.
- The **United States, Japan, Germany and Indonesia** complete the Top 5 of the main agri-food producers in the world.
- The **United States is the main exporter** of agri-food products in the world (7.7% of the global total in 2022).
- It is followed by **Germany, France, Spain and China** as the main worldwide **exporters** of agri-food products.

Main global agri-food producers by production value in billions of euros (2022)



Source: ACCIÓ, based on Euromonitor, 2023



# Main agri-food companies worldwide

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**Source:** ACCIÓ-PRODECA, based on Orbis. Code 10: Manufacture of food products, Code 11: Manufacture of beverages. Companies ranked by turnover; 2022-23

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

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The **volume of FDI in the food and beverage industry** totaled €119.5 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** ▼11.10% (2014-2018)






**€119.47 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, 2024



The agri-food industry in Catalonia

## 2. The industry in Catalonia



# Catalonia, the number one destination for agri-food companies

## Top sector of Catalan industry by turnover



**Turnover**  
**€48.23 billion**  
(+12% vs. 2019)



**Employees**  
**175,600**  
(-0.9% vs. 2019)

**19.7% of Catalonia's GDP**

## Leading exporting region in Spain

- Catalonia has remained for the **fourth consecutive year** as the **Spanish autonomous community** that **exports the most** food and beverages.
- It represents **15% of Catalan agri-food exports**.
- The **sector** continues along its **path from volume to value** in terms of exports and exceeds €15 billion with an increase in value of 3.2% in 2023 compared to the previous year.



**Generalitat de Catalunya**  
Government of Catalonia

## Top level support ecosystem

- **Top level research centers** dedicated to **technological innovation** in food processing.
- More than **2,100 startups** have been installed in Catalonia, with **143 startups** in the **agri-food sector**.

## Agri-food leaders choose Catalonia

- Catalonia is an **attractive and leading location** for agri-food FDI in Western Europe, being the **5th-highest region** in number of projects.

**Main agri-food companies investing in Catalonia:**



## Advanced logistics infrastructure

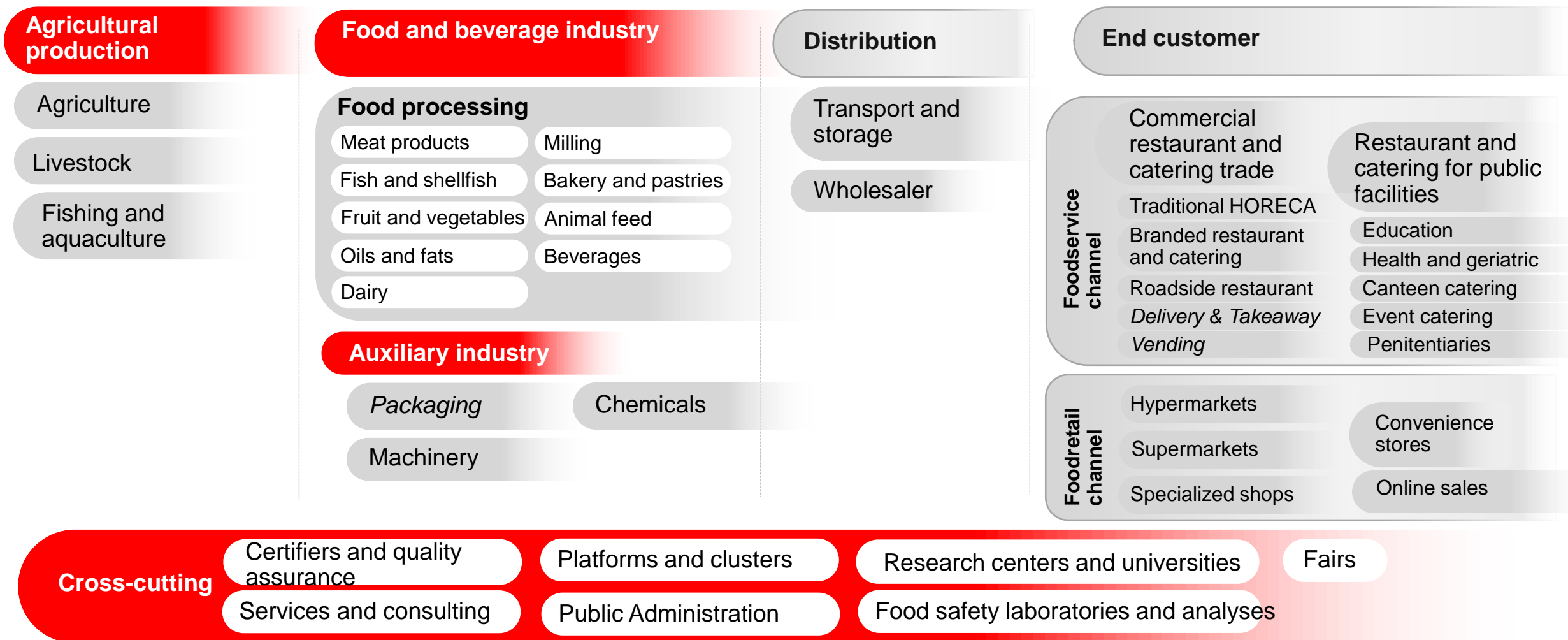
- A **logistics network** that provides service to **400 million consumers** in Europe and Mediterranean/Africa in **less than 48 hours**.
- The **Port of Barcelona** and the **Port of Tarragona** maintain an **undisputed leadership** in the movement of **agri-food products** in Europe and the Mediterranean.

## True attraction pole for talent

- More **cutting-edge creativity** is what has elevated Catalonia and its cuisine to its most prestigious **international position**.
- **9 university degrees, 6 university masters and 2 FP-DUAL degrees**, as well as a wide range of continuing education courses.

**Source:** ACCIÓ

# Agri-food industry value chain



**Note:** The categories shaded in gray have been considered in the mapping of the agri-food value chain. **Source:** ACCIÓ

## Number one sector of Catalan industry

**Total of the Catalan agri-food sector<sup>1</sup> → €48.23 billion in turnover in 2021** (11.9% vs. 2019) – **19.7% of Catalonia's GDP**

### Primary sector<sup>2</sup>



**€6.04 billion** in turnover



**54,972** agricultural/fisheries



**55,022** employees

### Food and beverage industry<sup>3</sup>



**€31.73 billion** in turnover



**5,017** companies



**92,888** employees

### Auxiliary industry<sup>4</sup>



**€10.46 billion** in turnover



**872** companies



**27,690** employees

### Additional information: sales and distribution channels<sup>5</sup>

	<b>Horeca for food and beverages</b>	<b>Retailers of food and beverages</b>	<b>Wholesalers of food and beverages</b>
Turnover	€7.75 billion	€20.09 billion	€21.29 billion
Companies	48,356	30,884	6,726
Employees	195,455	142,553	45,166

**Note 1:** The sum of the primary sector corresponds to the food and beverage industry and the auxiliary industry

**Source:** ACCIÓ, based on: <sup>2</sup> Idescat, *Survey on the structure of agricultural holdings* (2022 turnover, 2020 holdings and 2019 workers) sea fishing data (2020); <sup>3</sup> INE, *Structural statistics of companies* (2021): industrial sector; <sup>4</sup> own work based on data from Orbis, i <sup>5</sup> INE, *Structural statistics of companies* (2021): services sector

# Agri-food industry value chain (I)

## Agricultural production

### Agriculture

soriguē VIORCAM

FENIX FRESH Agro El Pla

espax Agrícola Cítrica Delta  
fruta de producción propia

### Livestock

bonArea COOPERATIVA Padesa Pondex

AVI DEL PLU YAK

### Fishing and aquaculture

Bellver VIVEROS DEL SEGRE

fangar FRIME

1987 GALAXIDI MARINE FARM TIOGEL LA FRAU

## Food and beverage industry

### Food processing

bonArea CORPORACIÓN Nestlé LIPSA Castellers Damm

Costa Brava Vall Company H V NOEL

europastry affinity BORGES Cobega TORRES GB FOODS

### Auxiliary industry

#### Packaging

TORRAPAPEL ARCONVERT Self-adhesive Papers & Films miquel y costas Alier RoM ALPLA  
GOMA CAMPS Desde 1758 Cartonajes Petit TESEM DS Smith VERIPACK BY GUILLIN

#### Machinery

GIRO HAARSLEV processing technology SEE TAVIL pujadas  
BioSystems QUALITY ESPRESSO INCAPTO KOD

#### Chemicals

CARBURROS METALICOS Grupo Air Products BRENNTAG GRUPO CARINSA

## Distribution

ekol 100.yol

makro

ROBLES

FRAMOS GLOBAL LIQUID FOOD LOGISTICS

NTL

Alonso DELTA Delta Logistics Global E.I.

CAVINY Transportes de líquidos alimentarios

Carbó Collbatallé

alfil LOGISTICS a7

ZELSA

## Final channel service

areas VIENA eat out

AN grup JUBANY restaurants

Buenas Migas CAL BLAY DES DE 1982

GRUPO TRAGALUZ UDON EL CELLER DE CAN ROCA

## Final channel retail

LIDL caprabo Bonpreu ESCLAT

Carrefour SPAR la Sirena

sorli ALDI SUPERMERCADO El Corte Inglés

MACXIPA Des de 1903 GRUPO CONFREMAR

daba MERCADONA SUPERMERCADOS DE CONFIANZA Alcampo

**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



# Agri-food industry value chain (II)

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## Food and beverage industry

### Meat products



### Fish and shellfish



### Fruit and vegetables



### Oils and fats



### Dairy



### Milling



### Bakery and pastries



### Animal feed



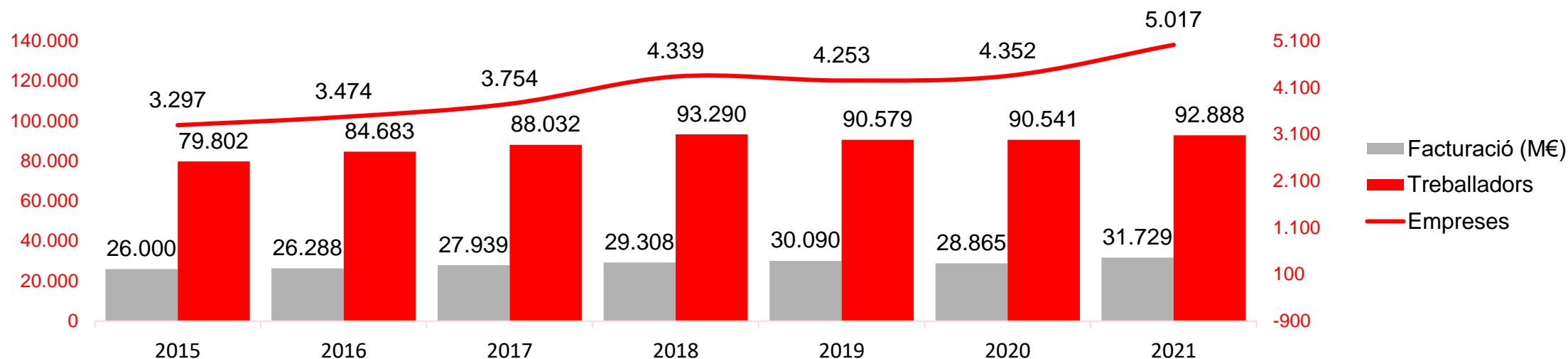
### Beverages



**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 food and beverage industry in Catalonia continues to grow and has had a 14% increase in turnover in the last five years

Evolution of the main variables of the food and beverage industry in Catalonia

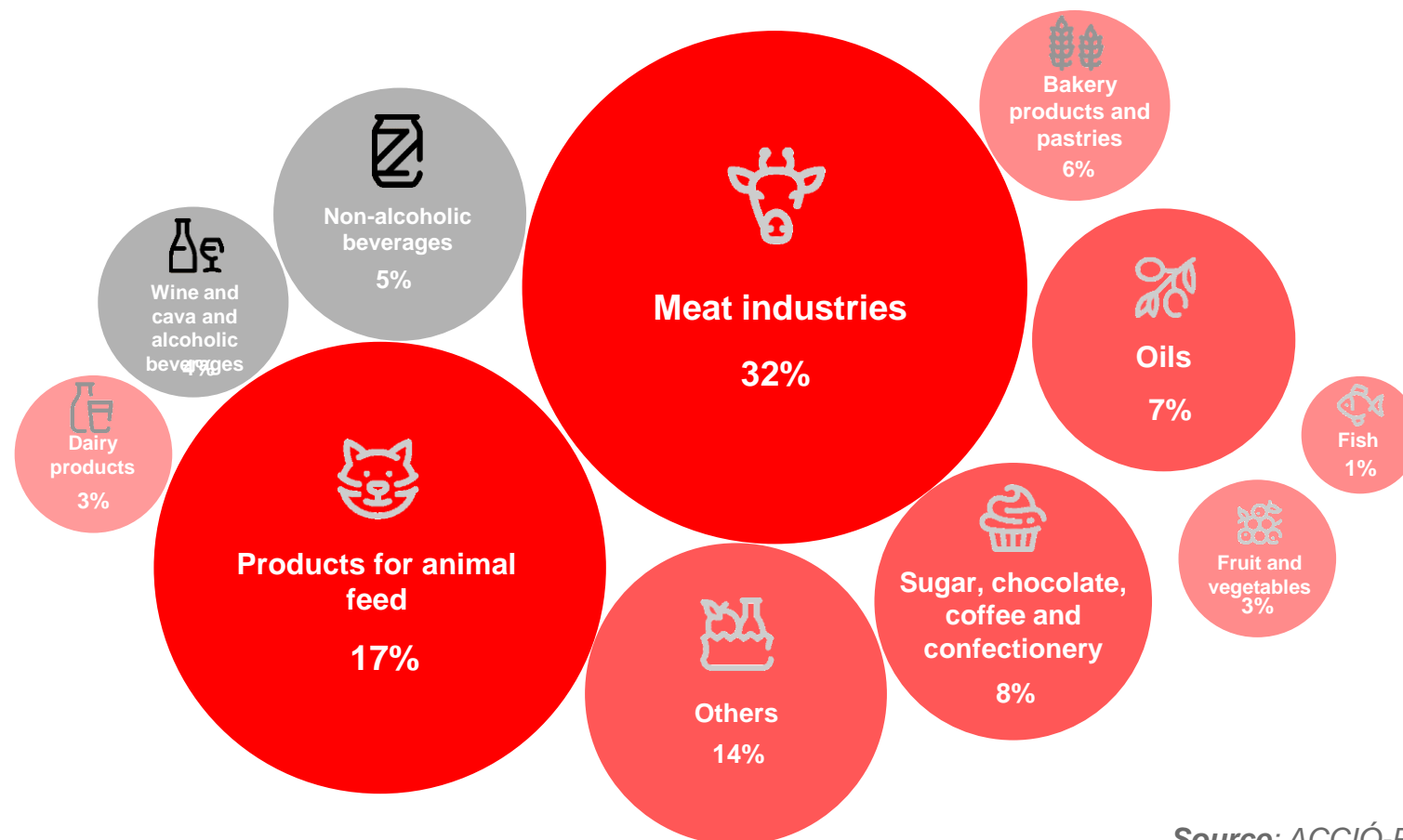


- The Catalan food and beverage industry has increased its turnover by **13.6%** in the last 5 years. Likewise, in the same period, it has increased the number of companies by **33.6%** and the number of workers by **5.5%**.
- In 2021, the Catalan food and beverage industry represented **22.3% of the turnover of the entire food and beverage industry in Spain**, 16.4% of the number of companies and 19.4% of the number of workers, **being the top region in Spain by turnover and number of agri-food workers**.
- Also, in 2021 the Catalan food and beverage industry was responsible for **20.4% of the total turnover of the Catalan manufacturing industry**, 12.3% of the number of companies and 18.7% of the number of workers.
- **The main segments of the Catalan industry are meat** (with 32% of the 2021 turnover); the products for **animal feed (17%)**; sugars, chocolate, coffee and confectionery (8%) and oils (7%).

Source: ACCIÓ, based on Statista

## Catalonia stands out for the diversity of its agri-food products

Main segments of the food industry in 2021, by turnover in %:



Source: ACCIÓ-PRODECA, based on Idescat

## The *foodservice* channel in Catalonia

The *foodservice* channel in Catalonia is a benchmark ecosystem that brings together companies from the entire food and beverage value chain, with large groups and globally recognized restaurant chains.



### Commercial restaurant and catering trade



### Restaurant and catering for public facilities



### Foodservice Cluster Catalonia

The Foodservice Cluster is a cluster organization whose main objective is to promote and strengthen the segment's competitiveness.

It promotes initiatives aimed at promoting the foodservice sector in Catalonia and stimulating and exploiting synergies between the members of the value chain in order to promote the development of transformative projects.



**Source:** ACCIÓ based on the Report entitled "The Foodservice sector in Catalonia" by ACCIÓ.

## The foodretail industry in Catalonia

It is of great economic and social importance, as it generates employment, innovation and added value. Final channel companies are those that sell, either physically or online, directly to the end customer to consume the food at home (hypermarkets, supermarkets etc.).



### Hypermarkets and supermarkets



### Specialized shops



### Foodretail Catalonia Cluster

The Food Retail Cluster of Catalonia works to improve the competitiveness and development of the associated companies through constant adaptation to the market and the consumer, the development of innovation, as well as training, promotion and joint participation in major international food fairs.



Source: ACCIÓ based on the Report "The Foodretail sector in Catalonia" by ACCIÓ.



## Catalan wines, recognized for their quality and excellence

The culture, tradition and landscape of wine are part of Catalonia's history to the point of becoming a symbol of our country. The varieties, the vines, the cellars and the wines are present in our history.



### Wine production in Catalonia (2022)



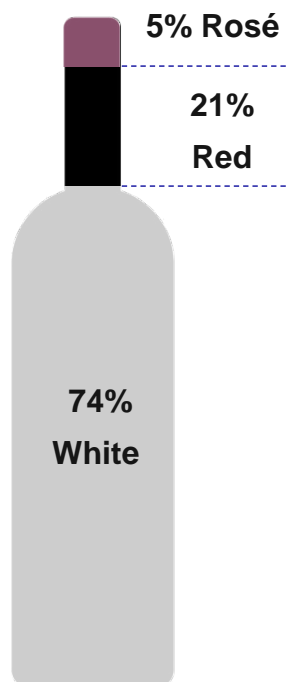
**2,819,951 hl** Wine production in Catalonia



**56,697 ha** total area in production (2023)



**6,729** wine growers registered in the Catalan DOs (2022)



### Wine production



### Catalan Winemaking

The Catalan Wine Cluster was born in 2009 with the mission of consolidating the wine region of Catalonia as a benchmark in terms of innovation and global quality. **INNOVI's main objective is to promote the competitiveness of companies in the entire value chain of the Catalan wine sector, through collaboration and innovation.**

**INNOVI**  
Clúster Vitivinícola Català

Source: ACCIÓ

## A well-established and diversified Catalan meat industry

The meat industry is the main agri-food subsector in Catalonia, oriented more and more towards vertical integration to ensure traceability from the farm to the point of sale.



Meat subsegments in Catalonia  
2022, tons

Porcí	2.019.354
Avícola	355.798
Boví	133.912
Oví	14.435
Conills	7.222
Equí	359
Cabrum	359

Companies



Catalan cluster of meat and  
alternative protein

It is a business association that aims to strengthen competitiveness of companies through the innovation and the cooperation.

This is made up of companies in the sector (farms, slaughterhouses, slaughterhouses and processed meat companies) and auxiliary services (feed, genetics, machinery, logistics, additives, waste and by-products, sanitary, etc.).



Source: ACCIÓ from INE 2021, INNOVAC cluster and Prodeca.

# Catalonia promotes alternative protein

Some of the main producers in the sector in Catalonia have presented new lines that include vegan products, hybrid vegetables or others with combinations of vegetable foods that imitate the taste of meat. In addition, they are making an important technological bet for laboratory meat.



Source: ACCIÓ based on the Report "The alternative protein sector in Catalonia" by ACCIÓ and Prodeca.

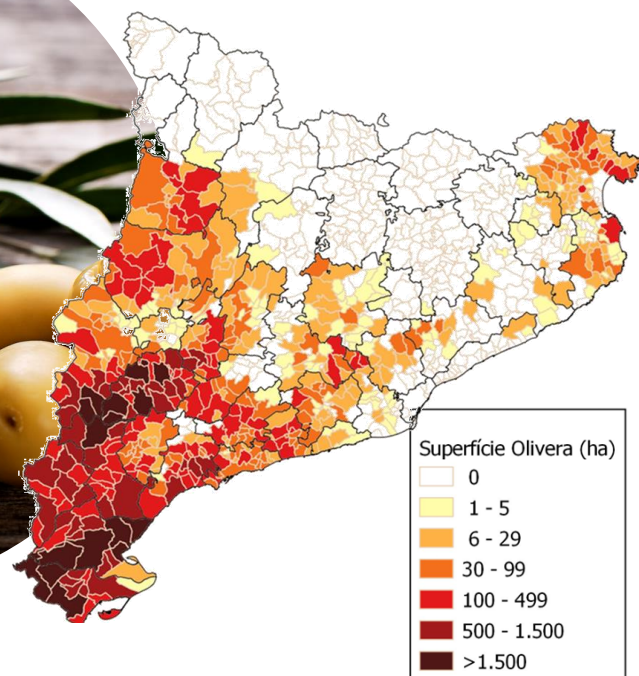


## The oils of Catalonia, among the most valued in the world

The Catalan territory has a very wide variety of excellent olive oils, highlighted by their wide range of flavors, aromas, colors and characteristics specific to each territory which give rise to a unique personality of each Catalan olive oil.



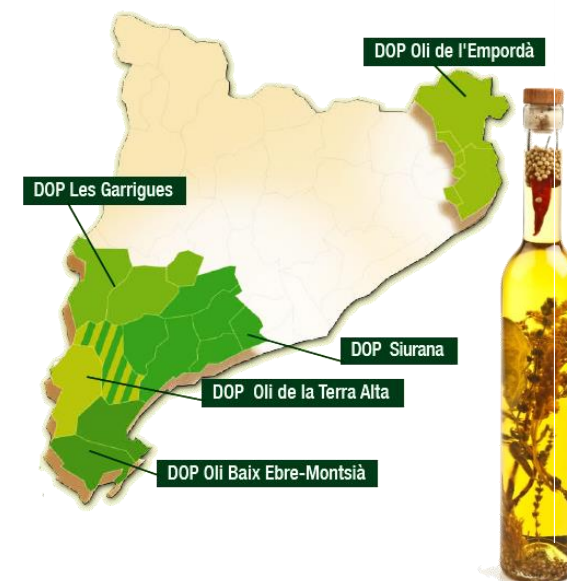
Municipal olive groves in Catalonia, 2022



Companies



Protected Designations of Origin



**Source:** ACCIÓ, based on the Department of Climate Action, Food and Rural Agenda of the Generalitat of Catalonia

# The agri-food industry ecosystem in Catalonia

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Business  
associations  
foodservice



Clusters accredited by ACCIÓ



Fairs



TECNIO  
technological  
centers

Specialized centers in the food and beverage sector

Cross-cutting specialized centers



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  
sector promotion and  
dissemination



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



## Clusters accredited by ACCIÓ

### Foodretail Catalonia Cluster



The Food Retail Cluster of Catalonia works to improve the **competitiveness and development** of the associated companies through constant adaptation to the market and the consumer, the **development of innovation**, as well as training, promotion and joint participation in major international food fairs.

### Food service cluster



The Foodservice Cluster is a cluster organization whose main **objective is to promote and strengthen the segment's competitiveness**.

It promotes initiatives aimed at promoting the foodservice sector in Catalonia and **stimulating and exploiting synergies** between the members of the value chain in order to promote the development of transformative projects.

### Catalan cluster of meat and alternative protein



It is a business association that aims to **strengthen competitiveness** of companies through the **innovation** and the **cooperation**.

This is made up of companies in the sector (farms, slaughterhouses, slaughterhouses and processed meat companies) and auxiliary services (feed, genetics, machinery, logistics, additives, waste and by-products, sanitary, etc.).

### Catalan winemaking cluster



The Catalan Wine Cluster was born in 2009 with the mission of consolidating the wine region of Catalonia as a benchmark in terms of innovation and global quality. **INNOVI's main objective is to promote the competitiveness of companies in the entire value chain of the Catalan wine sector**, through collaboration and innovation.

### Agricultural Production Machinery and Means Cluster



The Agricultural Production Machinery and Means Cluster of Catalonia takes on the challenge of **contributing to global and more sustainable agriculture**, creating a more competitive environment and future for the companies and institutions of the cluster, **through innovation, internationalization and cooperation**.

### Packaging cluster



The mission of the packaging cluster **is to promote the continuous advancement of the different processes that are part of packaging and wrapping**. They seek to form a collaborative network between the different agents involved to move forward cohesively, and in better conditions, towards the transformation of the sector. **A technological and sustainable transition in the packaging sector.**

Source: ACCIÓ

## The main hub of European Union startups

More than 2,100 startups are located in Catalonia

Barcelona is the **second-favorite** hub in the EU for founders wanting to create a startup

Startup Heatmap Europe, 2023

**Second-largest** startup hub with the highest number of founders from local universities in the EU  
Global Startup Ecosystem Index from StartupBlink 2023

**143** startups in the agri-food sector (agritech and foodtech) 2023, **19%** more than in 2021.



### Startups related to the agri-food industry

#### Food and beverage industry



#### Distribution and end customer



Source: ACCIÓ, based on the Barcelona & Catalonia Startup Hub 2023

## The agri-food sector breaks its export record with an increase of 3.22% compared to the previous year

**€15.33 billion**

Agri-food exports (2023)

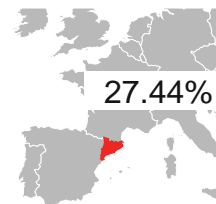
**3,021**

Regular exporters of agri-food products (2023)

- The **sector** continues along its **path from volume to value** in terms of exports and exceeds €15 billion with an increase in value of 3.2% in 2023 compared to the previous year. In the last 10 years, they have grown by 90.0% in value and 16.2% in volume.
- **94.7% of the value** exported relates to **regular exporters**.
- Catalonia has remained for the **fourth consecutive year** as the **Spanish autonomous community** that **exports the most** food and beverages.



Catalonia is the **number one** agri-food exporting region in Spain, ahead of Andalusia.



out of the total of agri-food exporting companies in Spain.

### Some of the most important regular exporters



**Source:** ACCIÓ-PRODECA, based on summary of Catalan agri-food exports 2023 with AEAT data



**Generalitat de Catalunya**  
Government of Catalonia

## Catalonia is a major agri-food exporter

### Catalan agri-food exports, breakdown by subgroups (2023)

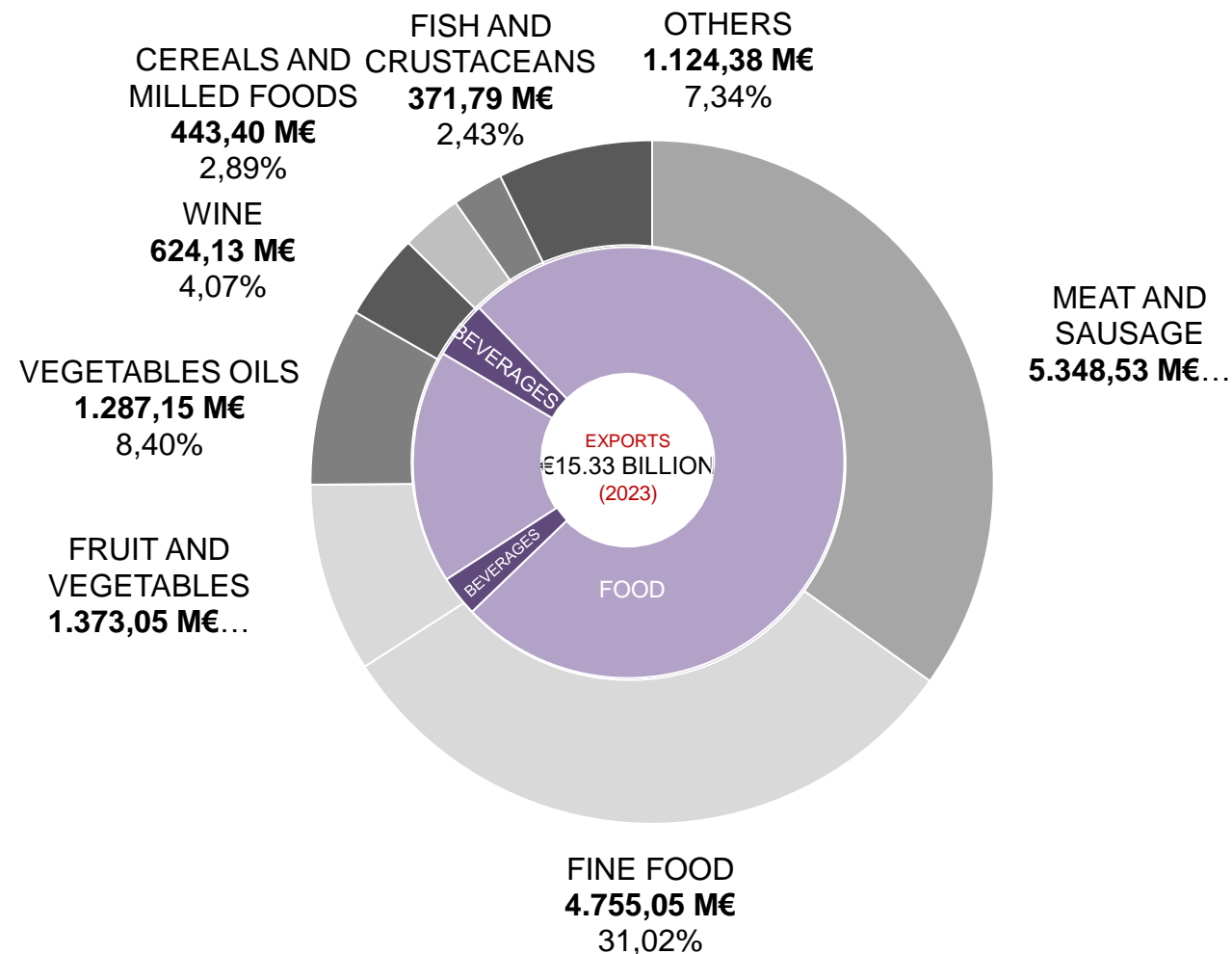


**Agricultural exports** represented **15.2%** of the total of Catalan exports in 2023.

**Meat products are the most exported subgroup** for the Catalan food industry, representing **34.9%** of agri-food exports in 2023.

Multi-product food – fine food, fruits and vegetables, and vegetable oils are the next most exported subgroups, as well as the wine and cava subsector in beverages.

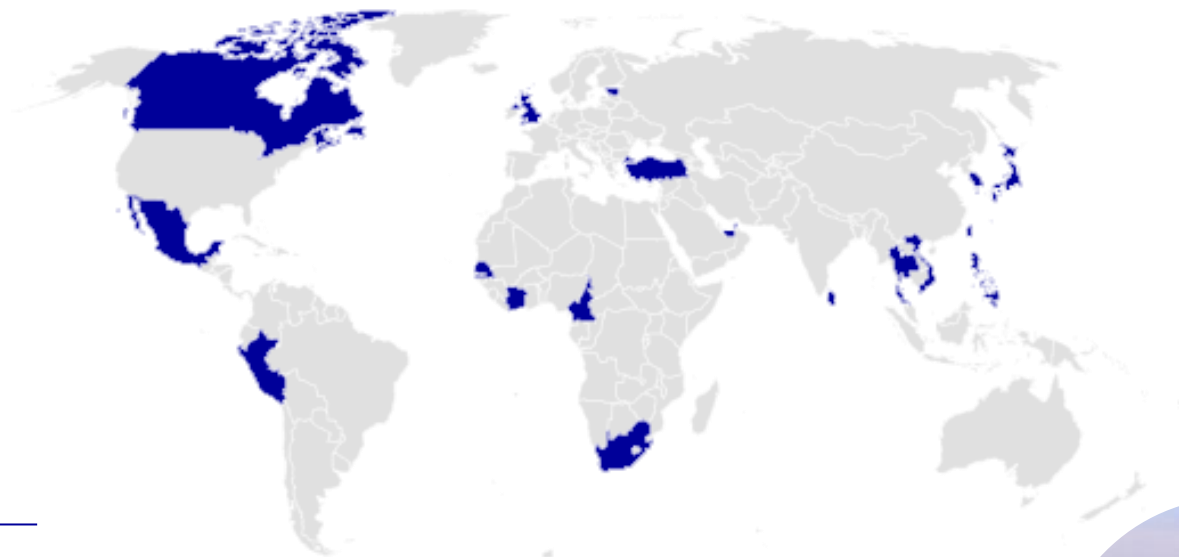
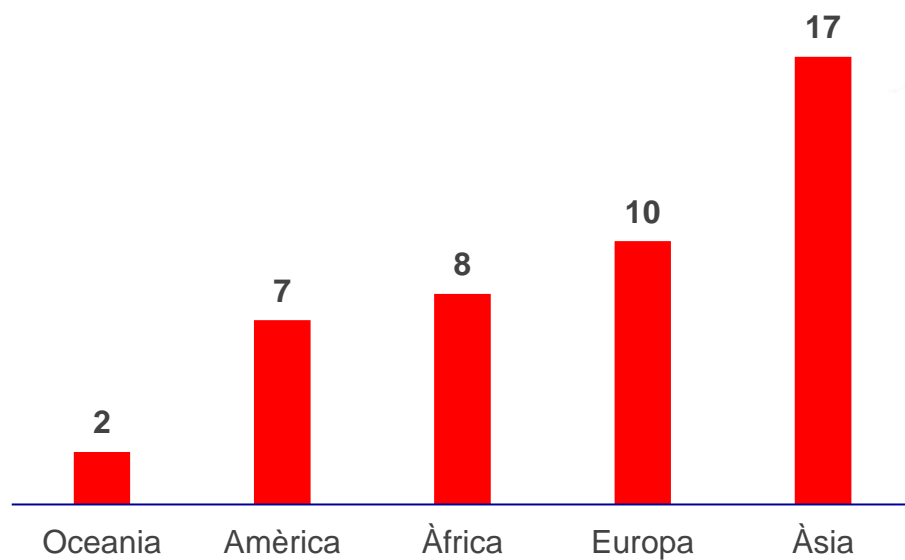
***Source:** ACCIÓ-PRODECA based on the summary of Catalan agri-food exports 2023 with AEAT data*



# International business opportunities in the chemical and plastics industry

ACCIÓ detects 44 international business opportunities for Catalan companies in the agri-food sector.

Regional distribution of opportunities



Recommender of international business opportunities.

Source: ACCIÓ from the 2024 Global Map of International Business Opportunities.















# Catalonia records more than €700 million of FDI in food and beverages between 2019 and 2023 29

In the five-year period 2019-2023, **Catalonia received almost 41 FDI projects** related to the food and beverage sector, with Germany as the main investing country.



## 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    |
|  3 United States   4 projects |  9 Iceland   1 project   |
|  5 Switzerland   3 projects   |  10 Ireland   1 projects |

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



**5th region in number of projects (▲2, 2014-2018)**

**4.7% of the EU total**



**8th region in invested capital (▲2, 2014-2018)**

**3.3% of the EU total**



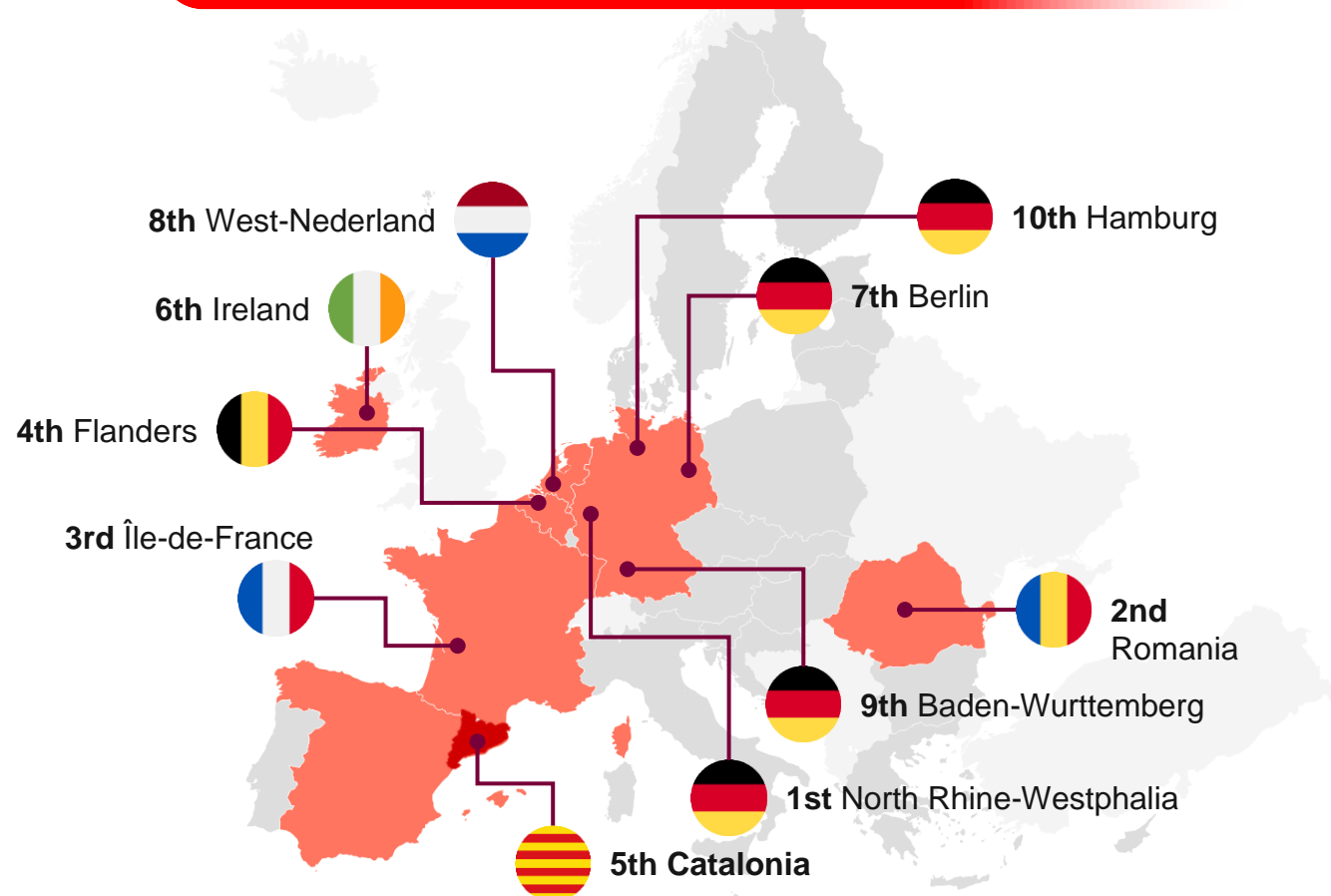
**5th region in jobs created (▲2, 2014-2018)**

**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



## Chemical industry leaders choose Catalonia (2019-2023)

### Elian Barcelona – Production activities



**October 2023 | €19.72 million\* | 64\* jobs**

Elian Barcelona, an agro-industrial company belonging to Viserion International and dedicated to the supply of soybean meal for the animal feed sector and oil for food consumption, **will expand its manufacturing activities** in Barcelona.

### Nestlé – Production activities



**September 2022 | €89.91 million | 183\* jobs**

The Swiss food and beverage company Nestlé has invested €89.91 million to **strengthen the manufacture of single-dose capsules and the production and packaging of instant coffee** at its plant in Girona, which will increase its production capacity and create new jobs until 2025.

Catalonia Trade & Investment

### Carrefour – Logistics, distribution and transport activities



**April 2022 | €33.17 million\* | 112\* jobs**

Carrefour, an international food retailer based in France, **will open a new warehouse** of 14,000 square meters (150,000 sq ft) in Castellbisbal. This new logistics infrastructure is aimed at supplying the local market.

Catalonia Trade & Investment

### Freixenet Group – Production activities



**December 2021 | €31.31 million | 64\* jobs**

The Freixenet Group, Cava manufacturer and subsidiary of the German firm Geschwister Oetker, has announced that **it will expand its facilities in Sant Sadurní d'Anoia**. It will expand its capacity by 35%, with the forecast that the new production line will be able to serve 15,000 bottles every hour.

### Florette – Production activities



**March 2020 | €13.01 million | 70 jobs**

Florette, manufacturer of ready-to-eat salads and vegetables and subsidiary of the French company Agrial, announces the **opening of its new salad packaging plant** of 64,000m<sup>2</sup> in Tortosa. The company has invested €13.01 million and created 70 jobs.

Catalonia Trade & Investment

### Puratos Iberia – Activities linked to the headquarters



**January 2020 | €19.99 million | 15 jobs**

Puratos Iberia, a subsidiary of the Belgian bakery and pastry supplier Puratos, **will expand manufacturing operations** at its headquarters in Sils. It plans to add a new line for margarine production and expand its masterbatch operations.

Catalonia Trade & Investment

**Notes:** Asterisks indicate that the volume of capital invested or jobs created has been estimated

**Source:** ACCIÓ, based on fDi Markets, 2023

# A world-renowned gastronomy that attracts talent from all over the world

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## Talent attraction to Barcelona

**One of the best places in the world to live and work. A magnet for young professionals and researchers from all over Europe**

**Barcelona gets 1<sup>st</sup> position at European level in its FDI strategy.**  
*FDI Strategy Awards, 2023*

**Number 1 city in Spain in terms of the most Michelin stars.**  
*Michelin Guide, 2024*

**Barcelona came 1<sup>st</sup> as the best city in southern Europe to live and work in**  
*City Talent Index, 2023*

**2<sup>nd</sup> best gastronomic destination in the world.**  
*Titan Travel, 2024*

**4<sup>th</sup> best city in Europe.**  
*Resonance Consulting, 2023*

**5<sup>th</sup> favorite city in the world to work.**  
*Boston Consulting Group, 2019*

**Catalonia has two wineries that are part of the 100 best wineries in the world**  
*Wine & Spirits, 2023*

## Catalonia is gastronomy

The most avant-garde creativity is what has raised **Catalonia and its cuisine in the most prestigious international position**, attracting visitors from the four corners of the world just to taste the best Catalan cuisine.

This universal recognition has been achieved thanks to the imagination found throughout Catalonia, **led by famous chefs awarded with Michelin stars** and other prestigious guide awards, which are, without a doubt, the greatest exponents of contemporary Catalan cuisine.



Ferran Adrià



Carme Ruscalleda



The Roca brothers



Jordi Cruz

*Source: ACCIÓ, based on the report "Catalonia is gastronomy" by the Catalan Tourism Agency*



# Catalonia, star region in the Michelin Guide



Catalonia will once again be, in 2024, the region in Spain with the most Michelin stars distributed in its territory. The establishment **Disfrutar**, which has received its third star, is also positioned as the second best restaurant in the world according to The World's 50 Best Restaurants. It is only surpassed by the restaurant Central, in Lima (Peru).

**5 restaurants**  
with three Michelin  
stars in 2024



**6 restaurants**  
with two Michelin  
stars in 2024



**47 restaurants**  
with a Michelin star in  
2024



*Source: ACCIÓ, based on Bon Vivreur, 2023.*

## The international recognition of Catalan *expertise* in the wine sector



Josep Roca – Sommelier and co-owner of El Celler de Can Roca

**The World's 50 Best Restaurants awards Josep Roca with the title of Best Sommelier in the World (Beronia World's Best Sommelier Award).**

The renowned Michelin Guide for the first time (2023) presents the award for Best Sommelier which once again goes to Josep Roca, adding this to the list of awards that recognize the prestige of El Celler de Can Roca.



Meritxell Falgueras – Sommelier, prestigious academic and publicist

**Member of the Catalan Academy of Gastronomy, international jury at the best competitions in the world and teacher of the official sommelier courses, she has written four books and actively participates in the dissemination of oenology through social networks and the media.**

- Prize for the best wine education book at the Gourmand World Awards 2021
- Special prize for the best wine blog at the Gourmand World Awards 2019
- Award for the best video about DO Catalonia 2019
- Best Drinks Book at the Gourmand World CookBook Awards 2018

**Source:** *El Mundo; Blog Wines and the City (Celler de Gelida)*














## Wide range of university studies and professional training specialized in agri-food...

uni  
versitat

Catalonia has an extensive global university education ecosystem:

12 universities                      534 degrees  
645 university masters

### University degrees related to the agri-food sector:

- Food Science and Technology –  **UAB**
- Oenology – 
- Human Nutrition and Dietetics     **UVIC**  
- Culinary and Gastronomic Sciences –  
- Agricultural and Food Engineering – 
- Food Engineering – 
- Agronomic Sciences Engineering – 
- Food Bioprocess Engineering – 
- Innovation and Food Safety – 
- Food Engineering – 

### University masters related to the agri-food sector:


- Environmental Agrobiology – 
- Aquaculture –   **UAB**
- Fermented Beverages – 
- Food Development and Innovation – 
- Agronomical Engineering –    
- Management and Innovation in the Food Industry 
- Innovation in Wine Tourism – 
- Nutrition and health – 

### FP-DUAL degrees in the agri-food sector:

**FPDUAL**

- Agricultural production
- Organic food production

### Training centers specializing in food:

- CIB - Culinary Institute of Barcelona **CIB**
- Barcelona Culinary Hub 

**Source:** ACCIÓ, based on "Canal Universitats", "The Dual Professional Training in Catalonia" and the "Professional Training" statistics of the Department of Education of the Generalitat de Catalunya

The agri-food industry in Catalonia

### 3. Trends and technologies related to the agri-food industry



## Consumer trends

### Consumer of experiences and innovation



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

### Convenience consumption



Due to the economic slowdown and rising inflation, consumers are looking for good deals and reduced prices, together with a major interest in private labels and distribution. In addition, there is a trend towards convenience consumption in local and nearby establishments and the consumption of prepared food.

### 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



Search for new premium products, constant innovation, design, location of points of sale and (omnichannel) experience.

### Responsible consumption



Sustainability is already a central part of the agri-food business strategy. Consumers' perception of a brand's sustainability efforts is an increasingly important factor in the purchase decision process.

**Source:** ACCIÓ



## Market trends

### Sustainability and adaptation to climate change



- **Organic foodstuffs:** natural products without insecticides, herbicides, fertilizers, chemicals.
- **Alternative protein:** expand the supply of these new foods, with an enriched nutritional profile and good organoleptic properties.
- **Reduction of plastic and packaging.**
- **Local food from km 0:** return to proximity to reduce the impact of transport costs and obtain fresher and quality food.
- **Optimized crops:** crops that save resources, such as hydroponic crops or vertical crops and crops adapted to climate change.

### Healthy food



- **Products without sugar, salt or additives.**
- **Healthy/functional products,** natural or with added components (probiotics, prebiotics, proteins, fiber, etc.).
- Offer of **gluten-free meals** in **fast food** restaurants.
- **Products aimed at the elderly** to live longer and better.
- **Clean label:** the consumer wants to know the ingredients included in the product clearly.

### Restaurant and catering 4.0



- **Generative AI:** application throughout the value chain.
- **Data quality:** data collection and analysis for traceability.
- **Robotics and automation:** robots in the living room and kitchen and the use of platforms and software that automate management tasks.
- **Digital restaurants:** digitization of menus or other aspects of the restaurant and catering offering.
- **Internet of things / Sensorization:** Sensors to improve efficiency and quality.

Source: ACCIÓ



# Technologies involved in the agri-food sector

## DIGITAL SOCIETY

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

## HEALTH

- Functional food
- Ohmics

## GREEN TRANSFORMATION

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

## INDUSTRIAL RESILIENCE

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

Source: ACCIÓ

# Thank you!

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More information about the sector and related news :

<https://catalonia.com/key-industries-technologies/food-beverage-in-catalonia>



**Generalitat de Catalunya**  
Government of Catalonia