



Food and drinks in Catalonia

July 2020

Sector snapshot

Food and drinks in Catalonia: Sector Snapshot

ACCIÓ

Government of Catalonia



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Barcelona, July 2020



1. Global food and drinks industry overview



2. The food and drinks industry in Catalonia



3. Opportunities in the food and drinks industry



1. Global food and drinks industry overview

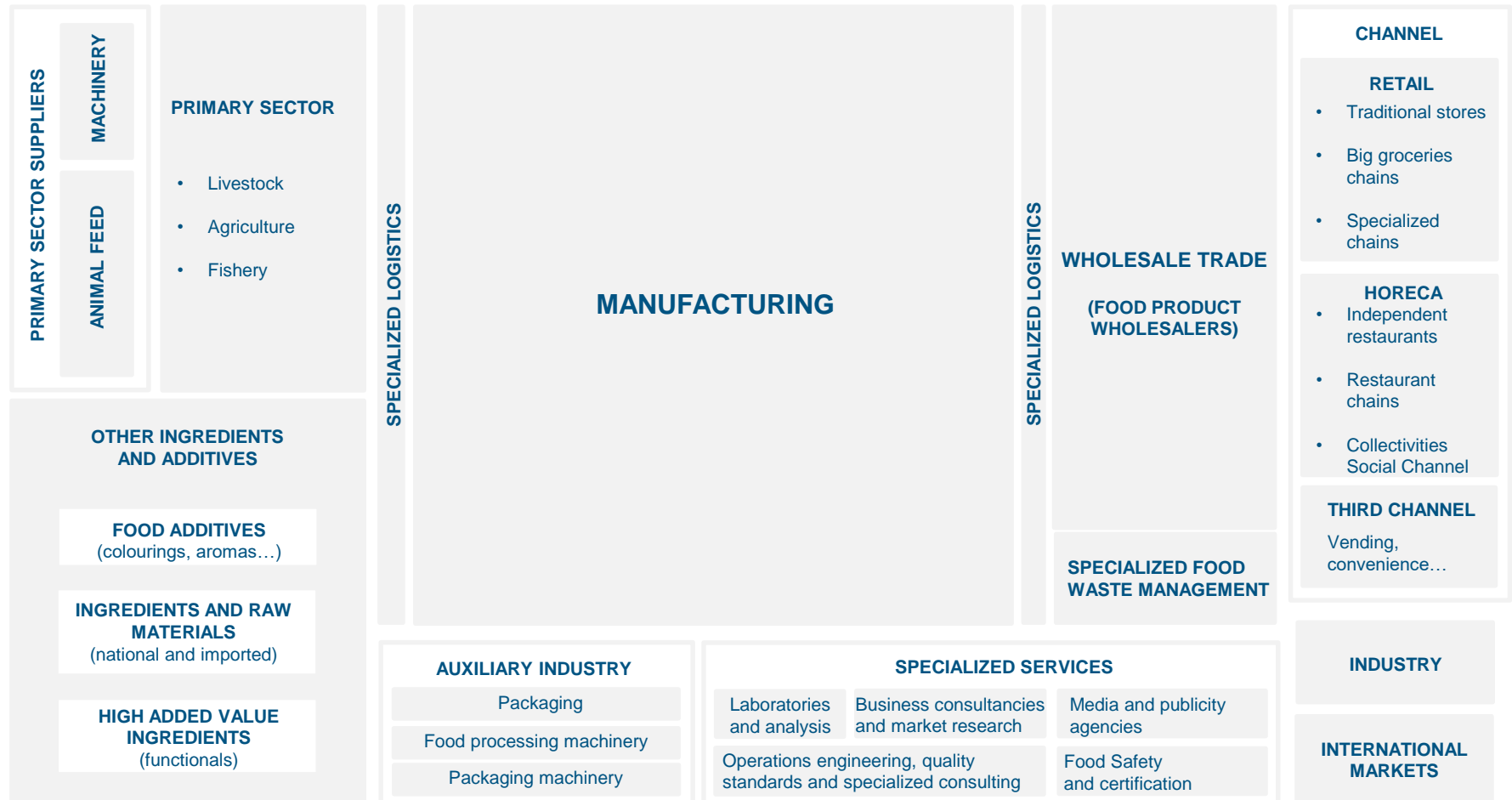


2. The food and drinks industry in Catalonia



3. Opportunities in the food and drinks industry

Food and drinks value chain

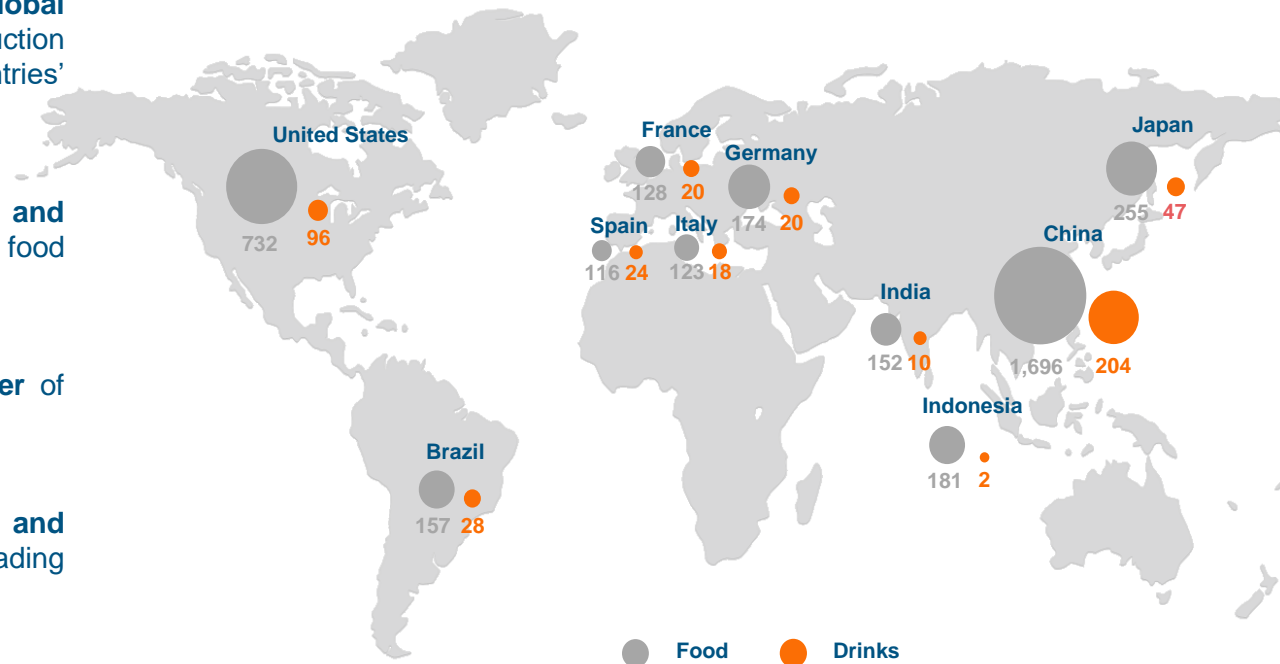


Source: Cluster Development

The global food and drinks industry

- Global food and drinks production was valued at **€6,464 billion** in 2019.
- **China is the first producer of the global food and drinks industry**, with a production value higher than the next five countries' production value combined.
- **The United States, Japan, Germany and Brazil** complete the Top 5 of the major food and drinks producers in the world.
- **The United States is the main exporter** of food and drinks products in the world.
- **Germany, the Netherlands, France and China** are the following world's leading exporters of food and drinks products.

Main global food and drinks producers by production value in € billion (2018)



Source: Euromonitor 2019



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Catalonia, top destination for food and drinks companies

PRINCIPAL SECTOR OF THE CATALAN INDUSTRY

- With an overall turnover of € 38,205 M and 164,372 employees.
- Four differentiated food and drinks hubs in Catalonia (**Lleida, Girona, Tarragona, and Barcelona**) with food and drinks industry companies at all different levels of the value chain.
- Robust public-private partnership supporting Catalan food and drinks ecosystem with **fourteen clusters & associations** across the region.



WORLD-CLASS INNOVATION ECOSYSTEM

- Catalonia counts on top research centres devoted to **technological innovation** in food processing, to the improvement of eating habits and to food security evaluation.
- More than 1,500 startups are located in Catalonia, making it the 1st startup hub in southern Europe (*Eu-Startups 2018*).
- International companies such as Nestlé have their R&D centres in Catalonia.

SUPERIOR LOGISTICS INFRASTRUCTURE

- A **logistics network** that serves **400 million consumers in Europe** and the Mediterranean/ Africa in less than **48 hours**.
- Specific infrastructures and services, such as the Mercabarna wholesale market, Barcelona's Port and Airport, are working together to consolidate **Barcelona as a key hub for fresh produce from Europe and the Mediterranean**.
- The **Port of Tarragona** maintains an indisputable **leadership in the movement of agri-food products**, both in Spain and the Mediterranean.

LEADING EXPORTING REGION IN SPAIN

- An international and open trade approach. In 2019, **21.3% of Spanish agri-food exports** were Catalan and **12.4% of Catalan Exports** came from the agri-food Industry.

Some of the most important regular exporters



FOOD AND DRINKS LEADERS CHOOSE CATALONIA

- Catalonia is an attractive and leading location for inward food and drinks FDI in Western Europe, **being the 8th region in number of projects**.
- In Barcelona there's a welcoming international business climate, with the Catalan capital being the fifth best city in the world to work in. (*Boston Consulting Group, 2019*).
- The most avant-garde creativity is what has elevated Catalonia and its cuisine to the most prestigious international position.

Top food and drinks companies investing in Catalonia



Principal sector of the Catalan industry

TOTAL € 38,205 M turnover

PRIMARY SECTOR



€ 4,690 M
turnover



57,423
agricultural holdings



55,022
employees

FOOD AND DRINKS INDUSTRY



€ 27,940 M
turnover



3,922
companies



88,032
employees

AUXILIARY INDUSTRY



€ 5,575 M
turnover



436
companies



21,318
employees

SALE AND DISTRIBUTION CHANNELS



TURNOVER

RESTAURANTS

€ 5,502 M

RETAIL TRADE

€ 10,486 M

WHOLESALE TRADE
AND INTERMEDIARIES

€ 18,737 M



COMPANIES

7,283

2,749

3,162



EMPLOYEES

8,382

52,568

42,659

Source: PRODECA. Data 2017

Food and drinks value chain



Note: This is a partial illustrative representation of the main companies forming part of the ecosystem

Source: Cluster Development

Catalonia stands out for the diversity of its products



Note: The map shows the specialization sectors of each province.

Source: EIC (DGI – ACCIÓ). Catalonia Industry Suppliers

An ecosystem supporting the food and drinks industry in Catalonia

Fairs & Congresses




Clusters & associations



Source: EIC (DGI – ACCIÓ)

Catalonia's dynamic university ecosystem



12
universities

591
degrees

687
master's degrees

208,500 university students

19,600
university professors

14,914
university research staff

More than **50** design schools

Universities offering food and drinks industry related degrees and masters



Bachelor's Degrees in...

Agricultural Engineering

Food Engineering

Food and Agricultural Engineering

Food Innovation and Safety

Food Science and Technology

Gastronomic and Culinary Sciences

Science and Animal Production

Master's Degrees in...

Aquaculture

Enabling Technologies for the Food Industry

Fermented Beverages

Food Biotechnology

Food Development and Innovation

Integrated Crop Protection

Quality of Food of Animal Origin

First-Rate Spot for Business and Executive Studies




Source: EIC (DGI – ACCIÓ). Universities Secretary


World-class innovation ecosystem

Renown applied and basic research groups supporting technological transfer and a complete network of scientific and tech centres represent the base of Catalonia's research and innovation programme.


World-class scientific infrastructures




ALBA synchrotron, the largest particle accelerator in Southern Europe.




Biomedical Research Park, Southern Europe's leader in Biomedical research.




Centre for Omic Sciences (COS) reference centre in Europe for Omic Sciences.



The Institute of Photonic Sciences, one of the finest research institutions in the world.



Mare Nostrum (BSC), 3rd Southern European Supercomputer.





IDIADA automotive testing facility.


RESEARCH GROUPS AND TECHNOLOGICAL CENTERS





Technological applications in the food and drinks sector


 **Virtual Reality/Augmented Reality**


 **Artificial Intelligence**


 **Internet of things**

 **Blockchain**


 **3D / 4D Printing**

 **Nanotechnology & materials**

 **Robotics**

 **Omics sciences**

COMPANIES USING THESE TECHNOLOGIES



Source: EIC (DGI – ACCIÓ)

Southern Europe's top startup hub

More than 1,500 startups are located in Catalonia

95 foodtech & drinks startups identified

1st startup hub in Southern Europe.

EU-Startups, 2018

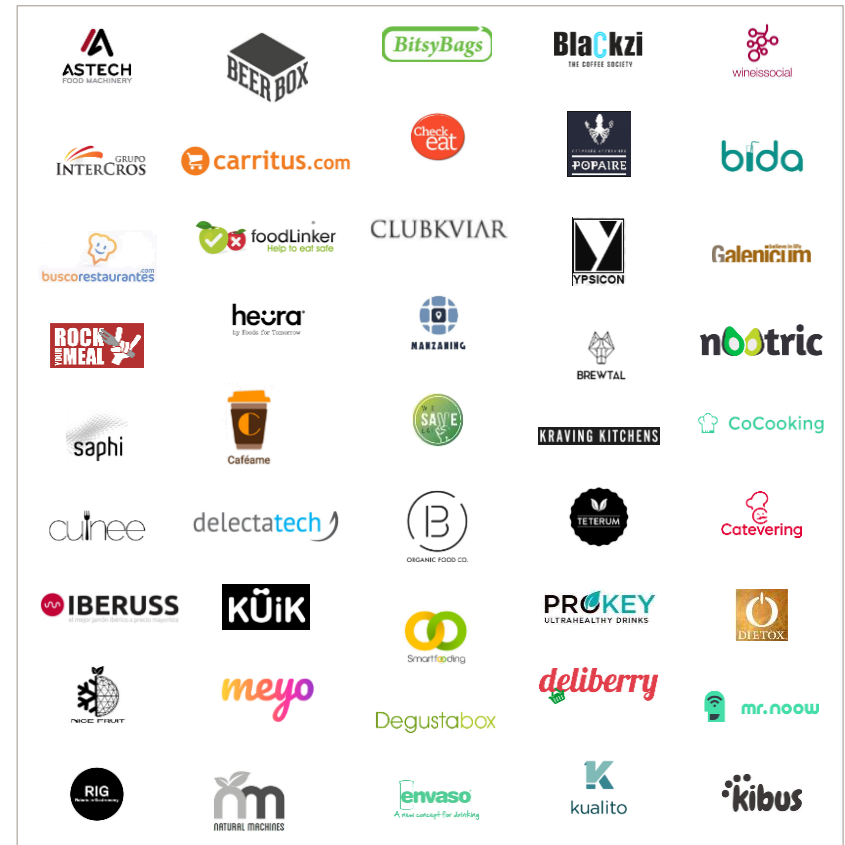
3rd preferred hub by creators of startups.

Startup Heatmap Europe, 2019

Barcelona is the **5th** European tech hub by volume of investment.

Dealroom, 2019

- 43% of startups have ecommerce & marketplace as a business model, 29% Software as a Service and 25% Development and manufacturing.
- 3 out of every 4 Catalan startups have obtained financial backing.
- 16,900 jobs related to Catalan startups.
- The technologies attracting more investors are ICT (23%), Big Data (16%) and Cloud Computing (13%).



Note: This is a partial illustrative representation of the main companies
Source: EIC (DGI - ACCIO) based on Barcelona&Catalonia Startup Hub, 2019

Integrated logistics hub

Southern Europe's largest intermodal logistics hub.

Catalonia is home to **two of the Mediterranean's main ports**, a **high-speed train station**, an **awarded international airport** and **highways seamlessly connected to the rest of the European road system**.



Top international ports of Barcelona and Tarragona

- **4M passengers** and **95MT in goods traffic**
- Connection with **more than 825 ports** around the world with 100 regular lines connecting directly with 200 overseas ports
- **Short maritime transit times** and **high frequency** of ships reduce stock costs.
- The Port of Barcelona is the **3rd** most productive in Europe.
- The Port of Tarragona has launched a 2019-2022 Investment Plan of over 160 million euros to expand its logistics activity area.



Barcelona-El Prat, world class airport

- **100 airlines flying to 200 different destinations in 57 countries** around the world.
- **The Air Freight Facility with 47.1 hectares** is integrated in a unique logistics platform in Europe: an area covering a 7 kilometer radius and with **2,000 hectares dedicated to logistics**.
- In 2016, Air Cargo in Barcelona achieved its highest traffic volume ever with **132,800 tonnes**, an **increase of 13%** over 2015 due to **implementation of new air routes**.



An extensive rail network and road infrastructure

- Catalonia is the **leading European region** in terms of **provision of road infrastructure** of four or more lanes (48.7 km/ 1,000 km²)
- **1st** Spanish region in both volume of **intra-regional** and **international road freight transport**
- An **extensive rail network** with almost 1,800 km **connecting** the main cities in Catalonia with the rest of **Spain** and **France**, including 400 km of high speed rail.
- Only location with in Spain with **standard gauge goods transport**.

Source: CIMALSA, Flight Airline Business (2017), Port de Barcelona (2016)

Catalonia is the leading exporting region in Spain

€ 10,677 M

Agri-food exports (2019)

21.3%

Catalonia is the 2nd agri-food exporting region in Spain.

12.4%

Over total Catalan exports

TOP EXPORTED PRODUCTS

 MEAT PRODUCTS

 FINE FOOD-MULTIPRODUCT

 FRUITS AND VEGETABLES

 VEGETABLE AND ANIMAL OILS

 WINES AND CAVA

SOME OF THE MOST IMPORTANT REGULAR EXPORTERS



546 subsidiaries abroad for Catalan companies in the agri-food sector

EUROPE



AMERICA



ASIA OCEANIA



AFRICA-MIDDLE EAST



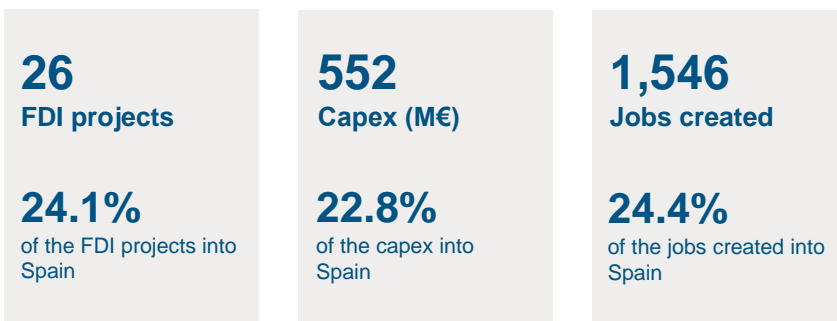
Note: Partial and illustrative sample of companies in order of turnover of the parent companies.

Source: EIC (DGI-ACCIÓ), Catalan agri-food exports summary 2019, PRODECA. Spanish exports, codes 01-Agriculture&Livestock, 03-Fishing, 10-Food, 11-Drinks, 2019, ICEX, Catalan agri-food commerce 2019, IDESCAT.

Catalonia, a leading destination for food and drinks FDI

Between 2015 and 2019, Catalonia was the main food and drinks FDI destination in Spain

Companies investing in Catalonia during the period 2015-2019



Data for 2015-2019

- Catalonia is the **8th region in Western Europe** in number of projects, ranks the **13th** in terms of job creation and **8th** in capital investment in the food and drinks industry.
- FDI into Catalonia accounts for **2.7% of the projects**, **2.4% of the capital investment**, and **2.5% of the jobs** created in **Western Europe**.



	Food	18 projects	€360.4 M	1,241 jobs
	Beverages	8 projects	€191.6 M	304 jobs

Source: fDi Markets, 2015-2019.
Sector: Food and beverages.

Pool of talent attraction and competitive costs

Barcelona talent attraction

One of the world's top spots to live and work in. A magnet for young professionals and researchers from all over Europe.

1st South European region for the Future in 2020-2021

FDI Int, 2020

2nd in the European Digital City ranking

Bloom consulting, 2017

3rd Barcelona is the 3rd best city in Europe

Resonance Consulting, 2018

4th tech city in the world

Nesta, 2017

5th preferred city in the world to work

Boston Consulting Group, 2019

6th world's city in terms of livability

Global Power City Index, 2019

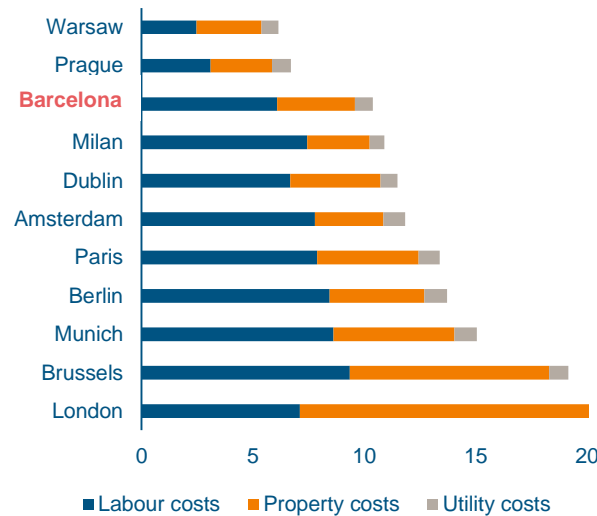


Competitive costs

Barcelona has the **3th lowest operating costs** of all the 10 similar cities compared, at €10.38 M per annum, therefore being 20% lower than the study average of €13 M per annum.

Barcelona also has among the most competitive labour costs, with top-notch professionals from all over the world.

Annual operating costs of a food & drinks manufacturing plant by cities, in M €



Sources: EIC (DGI – ACCIÓ) Catalan Tourist Board. Catalonia is gastronomy. FDI Benchmark 2020.

Catalonia is gastronomy

The most avant-garde creativity is what has elevated **Catalonia and its cuisine to the most prestigious international position**, attracting visitors from the four corners of the globe just to sample the finest Catalan cuisine.

This universal acclaim has been achieved thanks to the imagination found all over Catalonia, led by **famed chefs awarded Michelin stars and other accolades by prestigious guides**, who are undoubtedly the foremost exponents of contemporary Catalan cuisine, renowned the world over.



Ferran Adrià



Carme Ruscalleda



The Roca Brothers



Jordi Cruz

COVID-19 impact and response initiatives from food and drinks Catalan sector

COVID-19 impact

- During the health crisis, the food industry was one of the few sectors that **operated at full capacity**, and it was even necessary to undergo **new staff recruitment**. However, the lockdown led to instability in the agricultural market, which **benefited large chains above small traders and extensive agriculture**, since the consumer was forced to make purchases in one single establishment and restaurant closures decreased the consumption of many local products.
- Nevertheless, some small businesses were able to **adapt** by incorporating the **online channel** and **home delivery**.
- The economic situation concern has propitiated an **increase of the price factor as a shopping driver** (the private label consumption has grown +23% in Spain, according to AECOC).
- HORECA channel expenditure has been deviated to the Retail channel (+1,600 M€ for Retail in Spain, according to Nielsen). On the other side, the **HORECA channel got involved into prepared food solidarity initiatives** for the most vulnerable collectives.

HIGHLIGHTED INITIATIVES:



Introduction of a **new full range of drugstore and cleaning products** in their supermarkets



DISINFECTION SYSTEMS



Due to the increase of the e-commerce services demand, **reinforcement of the online platform** (+100 employees)



PLATFORMS



“**Save our restaurants**” initiative, consisting of prepaid vouchers to anticipate liquidity for the restaurants



E-COMMERCE



COLLABORATIVE PROJECT

Development of a **new volumetric and electronically controlled pressure respirator**, called “Garrotxa”



HEALTH PRODUCTS

Sources: EIC (DGI-ACCIÒ), La Vanguardia, AECOC, Público, Press releases.



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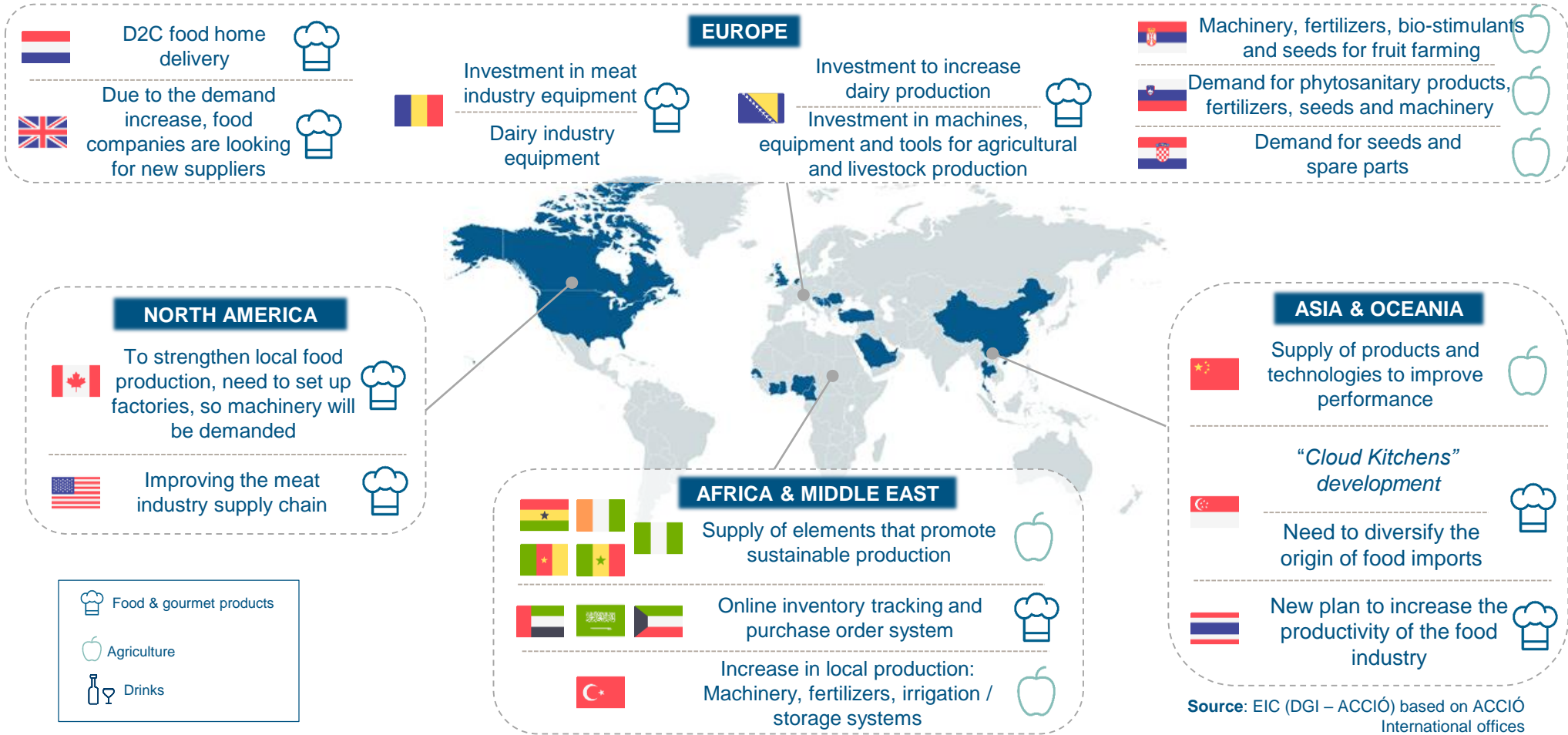
3. Opportunities in the food and drinks industry

33 International opportunities for Catalan companies



Source: Global trade mapping, 2019 by EIC (DGI – ACCIÓ).

International opportunities related to COVID-19 for Catalan food and drinks companies



Technological and business opportunities in Catalonia

INDUSTRIAL & MANUFACTURING



Fresh food

Catalonia is one of the leading meat regions in Europe.



Drinks: wine and beer

Catalonia is leader in quality wines and the home of cava.



Future food

Healthy and organic food choices are gaining importance in the sector.



Functional food & probiotics

The population is concerned about improving health through food gain importance.



Ingredients, additives and food supplements

The quality and safety of ingredients and additives gain importance and Catalonia has a very dynamic ecosystem.



Food and drinks packaging

Increased consumer interest in sustainable products, especially among the younger population.



Ready to eat, groceries and delivery

The digital economy is transforming the food and drinks industry.



Food waste management

262,000 tonnes of food thrown away each year in Catalonia.

LOGISTICS



Unparalleled distribution capacity

Catalonia's excellent geostrategic position allows for efficient intercontinental connections and easy fast distribution.



Catalonia, the ideal place for e-commerce activities

Catalonia has a thriving logistics ecosystem, being the leading logistics hub in Southern Europe.

TECHNOLOGICAL OPPORTUNITIES



3D Printing

Catalonia counts on a dynamic ecosystem and research initiatives in 3D printing.



Internet of Things (IoT)

Thanks to our universities and engineers Catalonia is becoming a hot spot for IoT.



Artificial Intelligence (AI)

Leading AI companies have productive sites and research centres in Catalonia.



High pressure processing (HHP)

Catalonia counts with a facility to carry out tests, and a meeting space from where to develop R&D projects.

Source: EIC (DGI – ACCIÓ)



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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/industries-in-catalonia/sectors/food-industries/food-and-gourmet-products.jsp>

For the full sector report, please send an e-mail to irodriguez@catalonia.com