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Iberian Peninsula (Spain and Portugal)

HRI Food Service Sector

Annual

2006

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Report Highlights:
The growing Iberian Peninsula (IP) Hotel, Restaurant and Institutional (HRI) sector provides excellent opportunities for U.S. food-ingredient and food-product exporters. Market access, however, can be complicated, requiring potential U.S. exporters to meet specific criteria and to take certain, identifiable steps before exporting. (MG60LJ15SH3)

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Madrid [SP1]
[PO]

INDEX

I. MARKET SUMMARY

Spain

Economic Trends

	2001	2002	2003	2004	2005 (2)	2006 (3)
ECONOMIC TRENDS						
Inflation (%)	2.7	4.1	2.6	3.2	3.2	3.2
Unemployment (%)	13.1	12.4	11.7	11.0	10.5	9.8
GDP at Market Prices (%)	2.6	2.1	2.4	3.1	3.3	3.2
GDP per Capita ($ Million)	19,691	20,227	21,271	23,644	23,928	26,091
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	16,810	18,327	22,284	24,870	32,841	37,665
Total U.S. Agricultural, Fish and Forestry Products	1,128	1,132	1,310	1,301	1,485	1,573
Total Food Products	14,564	15,960	19,433	22,041	29,403	33,957
Total U.S. Food Products	875	899	1,050	1,049	1,232	1,322
Major Competitors:						
EU	8,260	9,121	11,294	13,226	14,258	15,465
France	2,472	2,704	3,357	3,690	4,006	4,300
United Kingdom	1,167	1,178	1,563	1,663	1,799	1,925
Netherlands	1,055	1,173	1,387	1,531	1,646	1,755
Germany	959	1,038	1,299	1,442	1,561	1,678
Other EU	2,607	3,028	3,688	4,900	5,250	5,828
Argentina	976	1,062	1,287	1,410	1,518	1,619
Brazil	656	607	905	1,134	1,203	1,332
Total Fish and Seafood Products	3,658	3,763	4,620	4,790	5,383	5,779
Total U.S. Fish and Seafood Products	71	62	80	83	85	88
Major Competitors:						
EU	1,383	1,561	1,807	2,005	2,292	2,503
France	278	307	394	419	499	553
United Kingdom	215	241	277	295	335	361
Netherlands	207	232	244	291	316	341
Denmark	160	177	217	225	262	286
Other EU	523	604	675	775	880	964
Morocco	281	314	370	374	429	461
Argentina	408	306	445	356	372	371

(1) GTA
FAS/Iberia (2) 2005 Estimates and (3) 2006 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

PORTUGAL

Economic Trends

	2001	2002	2003	2004	2005 (2)	2006 (3)
ECONOMIC TRENDS						
Inflation (%)	4.4	3.6	3.3	2.4	2.1	2.1
Unemployment (%)	4.1	5.1	6.4	6.7	7.5	7.8
GDP at Market Prices (%)	1.8	0.5	-1.2	0.8	0.5	0.5
GDP per Capita ($ Million)	15,138	15,740	15,863	16,387	16,709	17,105
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	5,495	5,704	6,677	7,467	7,799	8,056
Total U.S. Agricultural, Fish and Forestry Products	244	275	292	289	335	338
Total Food Products	4,699	4,927	5,874	6,558	6,914	6,995
Total U.S. Food Products	202	233	241	234	256	268
Major Competitors:						
EU	3,281	3,498	4,331	4,805	5,158	5,229
Spain	1,733	1,778	2,307	2,468	2,666	2,701
France	592	576	679	728	750	756
Germany	264	291	341	394	418	424
Netherlands	177	239	306	375	435	446
Other EU	515	613	699	840	903	918
Brazil	200	203	239	365	362	369
Argentina	139	130	176	173	186	187
Total Fish and Seafood Products	913	921	1,065	1,183	1,278	1,350
Total U.S. Fish and Seafood Products	36	27	28	41	44	46
Major Competitors:						
EU	464	536	689	797	1,087	1,087
Spain	307	325	444	455	598	598
Sweden	12	22	34	90	151	223
Denmark	43	67	62	77	102	102
Netherlands	28	36	48	66	103	103
Other EU	74	86	101	109	138	138
Russia	65	61	83	101	126	146
Norway	107	89	57	56	58	58

(1) GTA
FAS/Iberia (2) 2005 Estimates and (3) 2006 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

The Iberian Peninsula (IP) Hotel, Restaurant and Institutional (HRI) sector expanded significantly during the mid 80's and 90's and into 2006, as a result of the profound social and economic changes unleashed upon Spain's and Portugal's accession to the European Union (EU) in 1986. The expansion is not yet complete, nor has it slowed much over the years, so we expect that the sector will be of growing interest to some U.S. exporters.

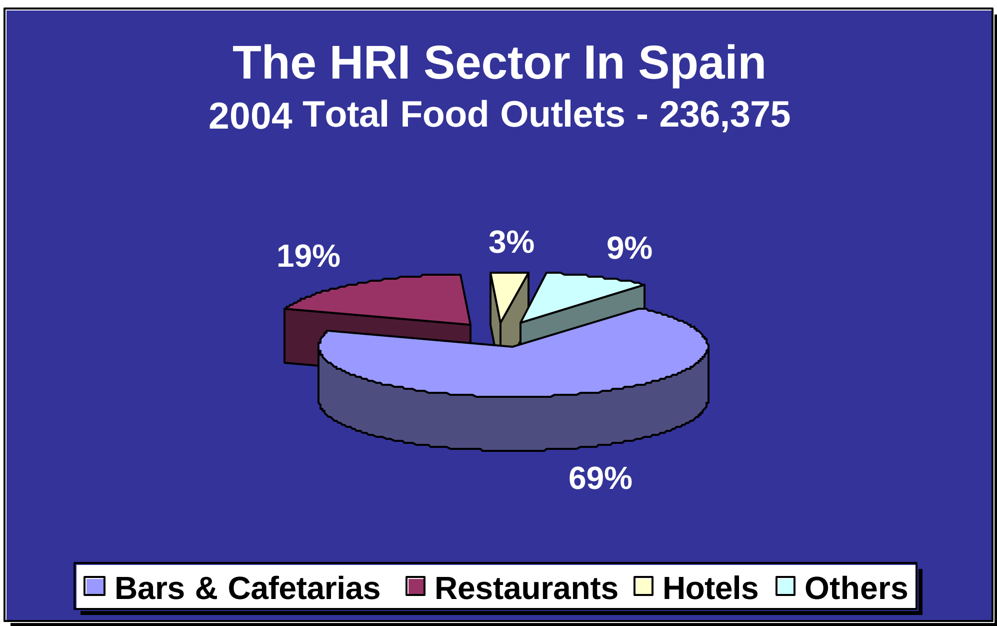
Synopsis of the Iberian Peninsula HRI sector:

- The Iberian Peninsula is one of the top tourism destinations in Europe with the number of tourists increasing every year, boosting demand for meals in the HRI sector;

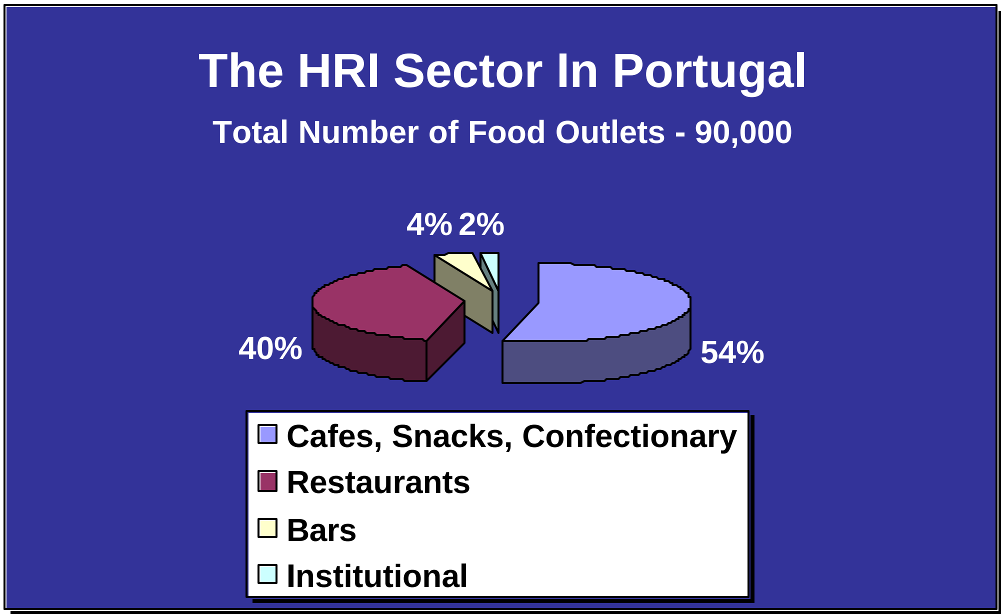
- In Spain, the HRI sector accounts for about one third of all food consumed;

- Restaurant chains, including ethnic and fast food, are gaining market share and are expected to continue growing; and,

- Consumption of ready-to-eat/take away food continues to grow as consumers substitute home-cooked for convenience and timesavings. Most hyper and supermarket chains now offer ready-to-eat/take away food, and there is an increasing number of food outlets specializing in take-away food, ranging from barbecue to more traditional meals.



Source: MAPA – Ministry of Agriculture, Fisheries and Food



The increase in local consumer (tourists excluded) spending on the HRI sector in Iberian Peninsula is due to:

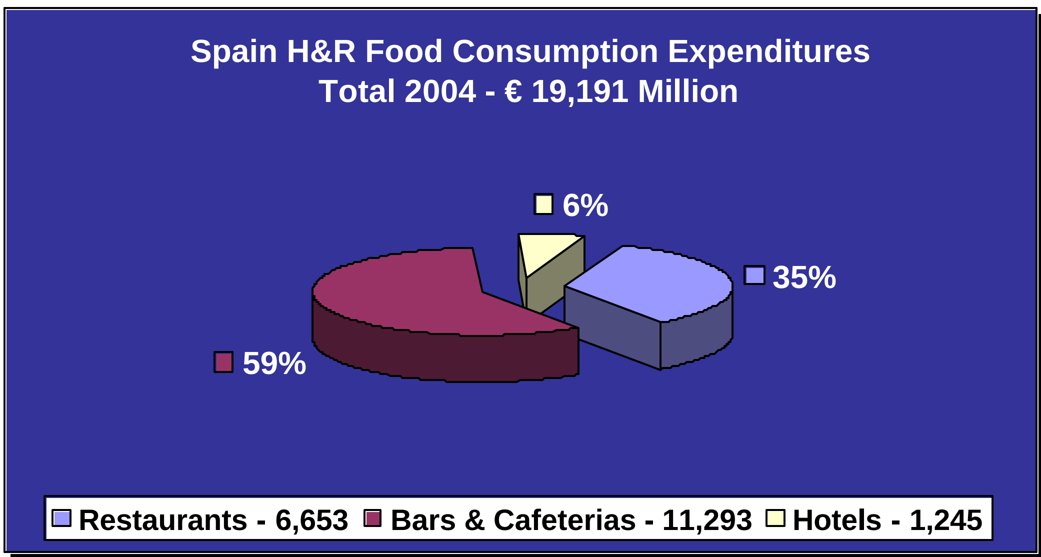
- Smaller households – The average family is one+ children per household. Also, single person households are increasing;
- Increasing number of women in the workforce – The percentage of women in the workforce is one of the highest within the EU, bolstering the demand for more ready-to-eat foods, as well as eating-out frequency;
- Change in eating patterns – The increased presence and success of ethnic foods from all over the world has particularly among the younger population; and to a lesser extent,
- Aging population – Around 17 percent of the IP population is now over 60 years old, increasing the demand for senior citizens centers and/or facilities; and,

In Spain, the HRI sector currently accounts for 26 percent of all food consumed. In 2004, the sector increased by 7.7 percent to € 74,752 million and is expected to continue to increase at a similar pace.

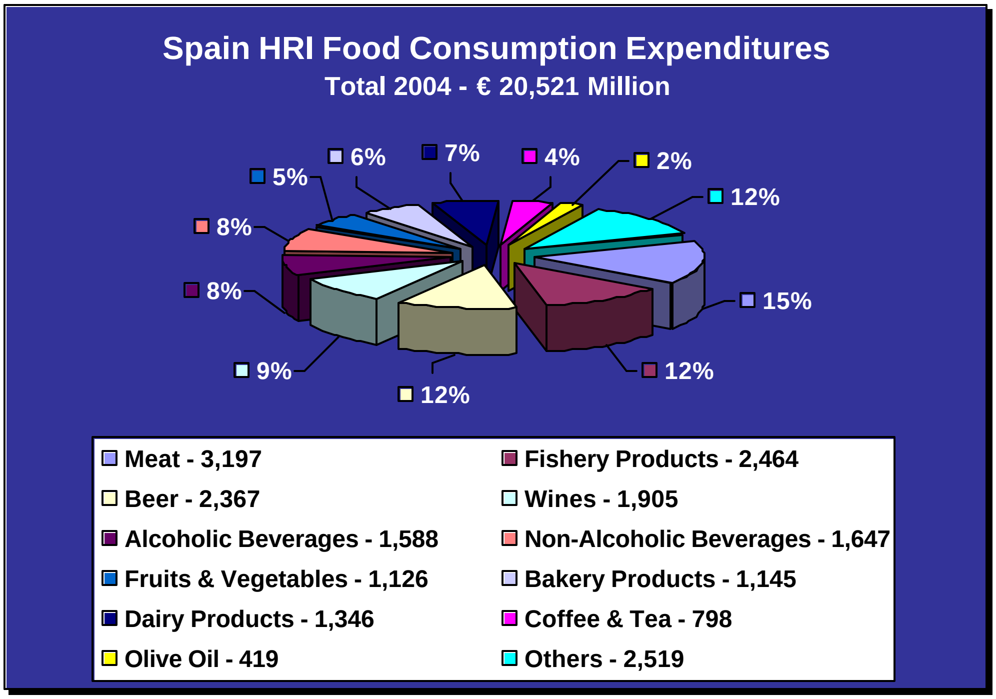
Spain Total Food Consumption Expenditures
(Billion Euros)

	2000	2001	2002	2003	2004	2005 (1)	2006 (2)
Home	40.7	44.8	48.5	50.7	54.2	58	62
Hotel & Restaurants	14.5	15.5	16.5	17.5	19.2	22	25
Institutions	1.1	1.1	1.2	1.2	1.3	1.4	1.4
Total	56.5	61.4	66.2	69.4	74.8	86	93
% Increase	6.8	8.6	7.8	4.8	7.7	8.0	8.5

Source: MAPA
FAS/Iberia (1) 2005 Estimates and (2) 2006 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.



Source: MAPA



Source: MAPA

Spain HRI Food Consumption Expenditures
HOME vs HRI

PRODUCT	2004		2005 (1)		2006 (2)	
	HOME	HRI	HOME	HRI	HOME	HRI
	(Million Euros)					
Meat Products	12,898	3,197	13,930	3,453	15,114	3,746
Fishery Products	7,548	2,464	8,152	2,661	8,845	2,887
Fruits & Vegetables	8,718	1,126	9,415	1,216	10,216	1,319
Dairy Products	6,681	1,346	7,215	1,454	7,829	1,577
Bakery Products	5,883	1,145	6,354	1,237	6,894	1,342
Coffee & Tea	514	798	555	862	602	935
Olive Oil	1,358	419	1,467	453	1,591	491
Wine	890	1,905	961	2,057	1,043	2,232
Beer	640	2,367	691	2,556	750	2,774
Non-Alcoholic Beverages	1,230	1,647	1,328	1,779	1,441	1,930
Alcoholic Beverages, Except Wine & Beer	333	1,588	360	1,715	390	1,861
Other Food Products	7,538	2,519	8,141	2,721	8,833	2,952
Total	54,231	20,521	58,569	22,163	63,548	24,047
Total HOME + HRI	74,752		80,732		87,594	

Source: MAPA
FAS/Iberia (1) 2005 Estimates and (2) 2006 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE IBERIAN PENINSULA

Advantages	Challenges
The IP tourism industry is pushing up demand for more international foods.	Food imported from third countries, including the U.S., must comply with EU food, labeling and traceability regulations, including the labeling of any foods that contain biotechnology ingredients. Requirements, in many cases, differ from those in the United States.
Food products in the market are becoming more diversified.	Competition from neighboring EU countries with the same food and labeling laws, and where tastes and traditional products may be well known.
IP consumers change in consumption habits, including the increased frequency of eating out.	Higher prices for U.S. food products relative to local market and/or imports from neighboring EU countries.
U.S. producers offer quality and a variety of products for the food service industry.	IP importers and consumers still have limited knowledge of the quality and diversity of U.S. food products.

II. ROAD MAP FOR MARKET ENTRY

A. Entry Strategy

Successful introduction of U.S. products in the Iberian Peninsula market will likely require local representation, personal contact, and/or access through a major EU-based importer. A local representative can provide up-to-date market intelligence, guidance on business practices and trade related laws, sales contact with existing and potential buyers, and market development expertise. The Offices of Agricultural Affairs in Madrid and Lisbon maintain listings of potential importers and are developing sector-specific information to help you introduce your product in the IP market.

U.S. processed food exporters now face even greater challenges in the IP market, because of the new EC labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled so that the consumer can distinguish the product. Because, IP consumers don't yet have familiarity with genetically modified foods the HRI sector, food processors and retailers are reluctant to purchase these processed products or food ingredients for processing.

We are also developing a series of product-specific market access reports that are/will be available to U.S. exporters (please see SP5037 and SP6002). Spain and Portugal generally apply EC rules and regulations, however, there are subtleties that you should learn about if you are thinking of exporting to the IP market. These reports will help you decide how to approach the IP market. For more information, we invite potential U.S. exporters to contact us directly.

In general terms, U.S. exporters already exporting to other EU Members will likely be meeting most of the requirements for exporting into the IP. Typically, food products are imported by an importer, broker and/or wholesaler or distributor. They also supply the HRI sector.

The following documents are required for ocean or air cargo shipments of foodstuffs to Spain and Portugal:

Bill of Lading and/or Airway Bill;

Commercial Invoice;

Phytosanitary Certificate and/or Health Certificate (when applicable)-- If your product is or contains plant or animal products, it will require a phytosanitary certificate issued by the competent U.S. authority. Also, if you are exporting animal products, your plant has to be approved to export into the EU;

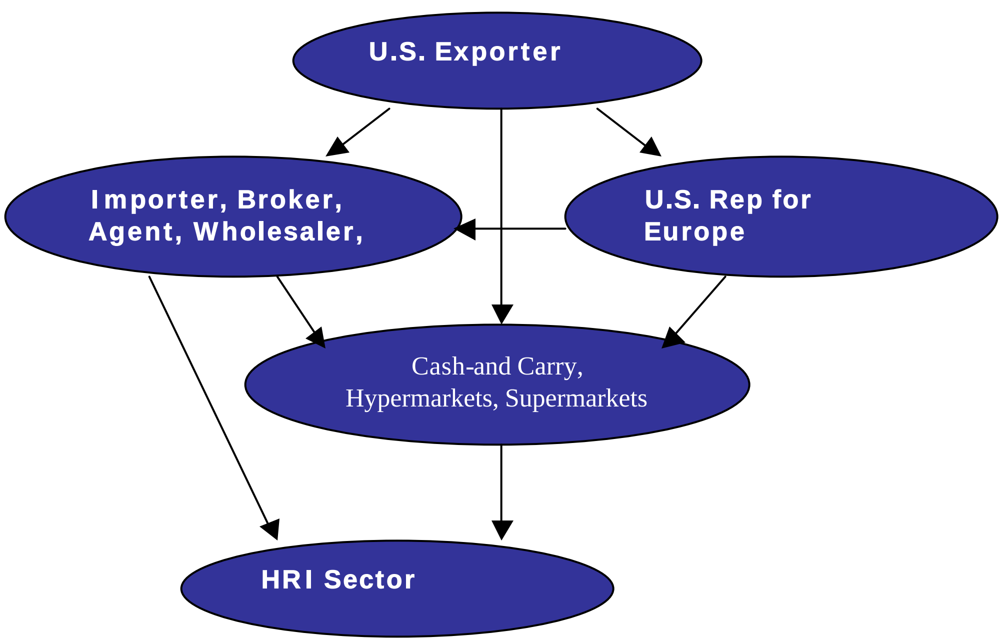
Import Certificate--most food products require an Import Certificate issued by the competent Spanish or Portuguese authority. However, the Import Certificate is obtained by the Spanish or Portuguese importer and/or the agent involved in the business and is intended for tariff classification purposes.

For more information on import and inspection procedures please see SP5020 at http://www.fas.usda.gov/gainfiles/200507/146130239.doc and PO5014 at http://www.fas.usda.gov/gainfiles/200507/146130240.doc.

These reports should be read in conjunction with the equivalent report done by the FAS Office in the U.S. Mission to the European Commission (USEU), E34054 at http://www.fas.usda.gov/gainfiles/200408/146107373.doc.

Also, please check the U.S. Mission to the European Union webpage at http://www.useu.be/agri/expguide.html, which will guide you on exporting into the EU.

B. Market Structure



The IP HRI sector's supply channels are diverse and serve small and large customers with different needs. Beverage suppliers are very specialized since most beverage consumption takes place in bars, cafeterias and restaurants. The most important HRI sector suppliers are:

- Importers and Wholesalers--More specialized by product segment, importers and wholesalers also supply directly the HRI sector, particularly the restaurant and hotel chains;

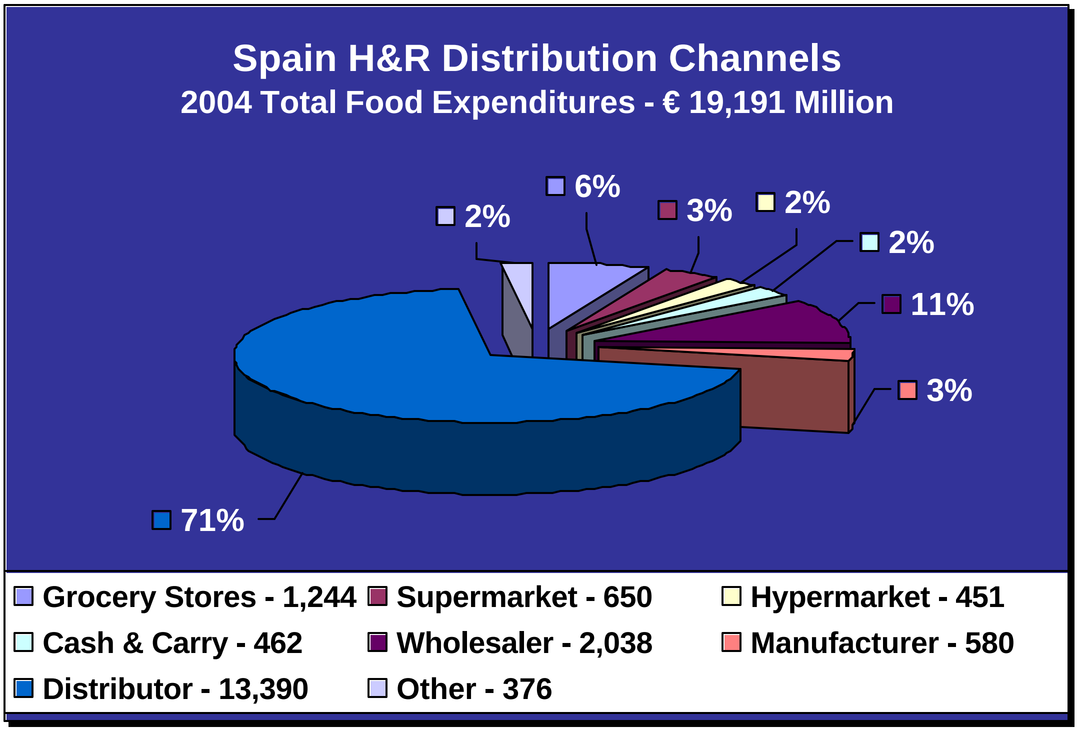
- Commercial distributors--play an important role in the supply of the food and beverages needs of many small and diverse food service providers;

- Wholesale Markets--Most perishable products are purchased at the wholesale market. The HRI sector is, by tradition, a net consumer of fresh produce;

- Cash-and-Carry--Open only to businesses and offering very competitive prices, they supply a wide variety of food products, from perishable to non-perishable, domestic and imported. Some cash-and-carry chains have developed outlets that only service the HRI sector;

- Super and Hypermarkets--Very important to the HRI sector when considering "last minute" purchases. Also important due to their convenient locations; and,

- Local Producers--Some players in the HRI sector buy directly from local producers, particularly if they are located close to major markets. The IP food service sector has a tradition of using fresh produce in their day-to-day menus. Many restaurants and hotels, particularly along the coasts, buy directly from local producers and fishermen.



Source: MAPA

C. Sub-Sector Profiles

1. Hotels

The Iberian Peninsula is one of the top tourism destinations in Europe. The tourism infrastructure is well developed throughout both Spain and Portugal and is continuously expanding since tourism is a very important sector for the economies of both countries. During 2005:

- In Spain, total sales in the hotel sector are estimated at € 15 billion;
- In Portugal, total sales in the hotel sector are estimated at € 6 billion;
- In Spain, there are 90,000 rooms under construction nationwide; and,
- In Portugal, tourism niche markets have been identified, like golf tourism, with some new, top-quality resorts now under construction.

The Iberian Peninsula Hotel Sector--2005

	Spain	Portugal
Total Number of Hotel Units	13,976	1,945
Total Number of Beds	1,210,016	253,927
Nights Spent (Million)	246	35

Source: Spanish & Portuguese National Statistics Institute - INE

Spain – Main Tourism Areas
2005 Total Number of Nights Spent – 246 Millions

Tourism Areas	Nights Spent
Costa Blanca	1,861,808
Costa del Sol	1,637,801
Costa de Barcelona	1,319,409
Isla de Tenerife	1,062,443
Costa Brava	996,790
Isla de Mallorca	841,536
Palma-Calvia	536,138
Sur de Tenerife	499,639
Isla de Gran Canaria	438,356
Sur de Gran Canaria	199,778
Total	9,393,698

Source: INE – www.ine.es

Spain – Main Hotel Chains - 2005

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Sol Melia Hotels & Resorts	N/A	Spanish	171	Distributors, Cash-and-Carry, Importers, Wholesalers
RIU Hotels	N/A	Spanish/ 50% owned by Germany	49	Distributors, Cash-and-Carry, Importers, Wholesalers
NH Hoteles	N/A	Spanish	119	Distributors, Cash-and-Carry, Importers, Wholesalers
Iberostar Hotels & Resorts	N/A	Spanish	37	Distributors, Cash-and-Carry, Importers, Wholesalers
Barcelo Hotels & Resorts	N/A	Spanish	44	Distributors, Cash-and-Carry, Importers, Wholesalers
Group H10 Hotels	N/A	Spanish	37	Distributors, Cash-and-Carry, Importers, Wholesalers
Fiesta Hotel Group	N/A	Spanish	33	Distributors, Cash-and-Carry, Importers, Wholesalers
Princess Hotels & Resorts	N/A	Spanish	20	Distributors, Cash-and-Carry, Importers, Wholesalers
Husa Hoteles	N/A	Spanish	74	Distributors, Cash-and-Carry, Importers, Wholesalers
AC Hotels	N/A	Spanish	64	Distributors, Cash-and-Carry, Importers, Wholesalers
Accor Hotels	N/A	French	56	Distributors, Cash-and-Carry, Importers, Wholesalers
Hoteles Hesperia	N/A	Spanish	43	Distributors, Cash-and-Carry, Importers, Wholesalers

Source: Hostelmarket

Spain has 284 hotel chains with 436,722 rooms that account for just over 50 percent of all tourist beds in Spain. The top ten chains accounts for nearly 16 percent of the total.

The Portuguese Hotel Sector – 2005

Region	No. Of Units	No. Of Beds
Mainland Portugal	1,689	218,954
North	435	32,184
Center	398	34,418
Lisbon & Tagus Valley	301	46,594
Alentejo	130	9,271
Algarve	425	96,487
Azores Islands	75	7,028
Madeira Islands	190	27,945
Total Portugal	**1,954**	**253,927**

Source: INE – www.ine.pt

Portugal – Main Hotel Chains - 2005

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Pousadas de Portugal	N/A	Portugal	45	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Pestana **Pestana Hotels & Resorts**	N/A	Portugal	36	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Amorim / Accor	N/A	Portugal/ France	30	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Vila Gale	N/A	Portugal	17	Distributors, Cash-and-Carry, Importers, Wholesalers
Choice Hotels	N/A	UK	18	Distributors, Cash-and-Carry, Importers, Wholesalers
Sol Melia Group	N/A	Spain	13	Distributors, Cash-and-Carry, Importers, Wholesalers
The Tivoli Hotels Group	N/A	Portuguese	11	Distributors, Cash-and-Carry, Importers, Wholesalers

2. Restaurants

The Iberian Peninsula food service sector expanded significantly in the last couple of decades as noted previously. Although traditional restaurants still dominate, changes in the eating habits and lifestyles of Spaniards and Portuguese have accelerated the increase of chain restaurants, including fast-food and ethnic restaurants. New types of "healthy" fast food restaurants have emerged, as have salad and gourmet bars, vegetarian restaurants, as well as soup bars. Under the speciality food sector, coffee shops and ice-cream shops are also growing very rapidly. Food Courts and other types of food service establishments, located in modern shopping and entertainment centres are very popular and attract a continuously growing number of customers. Fast food chains, restaurants and coffee shops consider such places as key locations for their business. Restaurant chains buy their food products from either local or larger EU-based suppliers in some cases consolidating purchases for the entire chain.

Spain – Leading Fast Food Chains – 2005

Company Name	Food Sales 2004 Million €	No. Of Outlets	Purchasing Agent
Telepizza	394	533	Importers, Distributors, Wholesalers
Pans & Company/Bocatta	210	394	Importers, Distributors, Wholesalers
Burger King	268	376	Importers, Distributors, Wholesalers
McDonald's	579	353	Importers, Distributors, Wholesalers
Pizza Hut	70	134	Importers, Distributors, Wholesalers
Big Dog	17	90	Importers, Distributors, Wholesalers
Rodilla	48	75	Importers, Distributors, Wholesalers
100 Montaditos	23	68	Importers, Distributors, Wholesalers
Pizza Movil	21	61	Importers, Distributors, Wholesalers
Kentucky Fried Chicken	30	48	Importers, Distributors, Wholesalers

Source: HostelMarket

Portugal – Leading Fast Food Chains - 2005

Company Name	Food Sales	No. Of Outlets	Purchasing Agent
McDonald's	N/A	113	Importers, Distributors, Wholesalers
Pizza Hut	N/A	85	Importers, Distributors, Wholesalers
Telepizza	N/A	68	Importers, Distributors, Wholesalers
Pans & Company	N/A	33	Importers, Distributors, Wholesalers
Loja das Sopas	N/A	31	Importers, Distributors, Wholesalers
A Cascata	N/A	24	Importers, Distributors, Wholesalers
O Kilo	N/A	20	Importers, Distributors, Wholesalers
Pasta Café	N/A	19	Importers, Distributors, Wholesalers
Burger King	N/A	17	Importers, Distributors, Wholesalers
KFC	N/A	15	Importers, Distributors, Wholesalers

3. Institutional

The Iberian Peninsula institutional food service is dominated by the big multinationals, where the top ten companies are responsible for 50 percent of total sales. In addition there are hundreds of local small companies providing catering and events services, but are difficult to account for in term of units and sales. In general terms:

- Every year, an increasing number of institutions, including businesses and industries, schools, health and welfare and many others are contracting their meals to catering companies;

- Spanish total sales of the institutional food sector are estimated at € 2.1 billion, on 395 million meals. The sector is expected to continue increasing at around seven percent a year; and,

- Portuguese total sales of the institutional food sector are estimated at € 500 million, on 135 million meals. The sector is expected to continue increasing at around five percent a year.

Large institutional food service companies are price sensitive, importing directly, and/or buying products, particularly fresh produce, from local suppliers.

The Iberian Peninsula Institutional Food Sector by Segment - 2005

	Business & Industry		Education		Health/Welfare		Other Segments		Total	
	Million €	%	Million €	%	Million €	%	Million €	%	Million €	%
Spain	400	19	750	36	640	31	300	14	2090	100
Portugal	220	46	100	20	130	26	40	8	500	100

Source: Sector Magazines

Spain – Leading Institutional Food Sector Companies – 2005

Company	Total Sales (Million €)	No. Of Meals (Millions/Year)	Purchasing Agent
Eurest Colectividades, S.A.	207	N/A	Direct, Importer, Wholesaler
Serunion, S.A. (Grupo)	157	108	Direct, Importer, Wholesaler
Grupo Arturo Cantoblanco	120	N/A	Direct, Importer, Wholesaler
Aramark Servicios de Catering	110	N/A	Direct, Importer, Wholesaler
Eurest, SA (Airline Catering)	107	26	Direct, Importer, Wholesaler
Sodexho España, SA	90	N/A	Direct, Importer, Wholesaler
Euronow (Grupo Paradis)	70	N/A	Direct, Importer, Wholesaler
Iber-Swiss Cateing, SA	70	15	Direct, Importer, Wholesaler
Cia. Int. De Coches-Cama	63	N/A	Direct, Importer, Wholesaler
Vanyera3, SL	50	18	Direct, Importer, Wholesaler

Source: Hostelma rket

III. Best Products Prospects

Tree Nuts
Fish and Seafood, fresh and frozen
Pulses
Snack foods
Speciality foods

IV. Post Contacts and Other Information

If you have any questions or comments regarding this report or need assistance exporting to Iberian Peninsula, please contact the Office of Agricultural Affairs in Madrid or Lisbon at the following address:

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-91 587 2555
Fax: 34-91 587 2556
Email: AgIberia@usda.gov
http://www.embusa.es/

American Embassy, Madrid
C/ Serrano, 75
28006 Madrid
Spain

or

Foreign Agricultural Service
American Embassy, Lisbon
PSC 83, Box FAS
APO AE 09726
Tel. 351-217702358
Fax: 351-217269721
Email: AgIberia@usda.gov
http://www.american-embassy.pt/

American Embassy, Lisbon
Av. Das Forças Armadas
1600-081 Lisbon
Portugal

Please consult our home page for more information on exporting U.S. food products to the Iberian Peninsula, including:

Spain

The Exporter Guide, SP5032 at http://www.fas.usda.gov/gainfiles/200509/146131076.doc;

The Retail Food Sector, SP5039 at http://www.fas.usda.gov/gainfiles/200511/146131609.doc;

The Food Processing Sector, SP???? at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp;

Portugal

The Exporter Guide, PO5020 at http://www.fas.usda.gov/gainfiles/200509/146131067.doc;

The Retail Food Sector, PO5024, at http://www.fas.usda.gov/gainfiles/200511/146131460.doc;

The Food Processing Sector, PO???? at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp.

Importer lists are also available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below:

Spain

Trade Associations

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)

Diego de León, 44
28006 Madrid
Tel: 34 – 91 411 7211
Fax: 34 – 91 411 7344
www.fiab.es
fiab@fiab.es

FEHR – Federación Española de Hostelería
(Spanish Federation for HRIs Sector)
Camino de las Huertas, 18, 1ª
28223 Pozuelo de Alarcón
Tel: 34- 91 352 9156
Fax: 34- 91 352 9026
www.fehr.es
fehr@fehr.es

ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)

Cedaceros, 11, 2 Despacho
28014 Madrid
Tel: 34- 91 429 8956
Fax: 34- 91
www.asedas.es
info@asedas.org

ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)

Velazquez, 24
29006 Madrid
Tel: 34- 91 522 3004
Fax: 34 –91 522 6125
www.anged.es
anged@anged.es

Government Agencies

Imported Foodstuffs, Infections and Compound Residues, Health Certification, Port Inspection and EU Alerts
Subdireccion General de Sanidad Exterior
Ministerio de Sanidad y Consumo
Paseo del Prado, 18 y 20
28014 Madrid
Phone: (34-91) 596-2038
Fax: (34-91) 596-2047
http://www.msc.es/Diseno/informacionProfesional/profesional_sanidad_exterior.htm

E-mail : saniext@msc.es

AGENCIA ESPAÑOLA DE SEGURIDAD ALIMENTARIA (AESA)
Spanish Food Safety Agency
Alcalá, 56
28071 Madrid
Fax: (34-91) 338-0375
http://www.aesa.msc.es/aesa/web/AESA.jsp
E-mail: comunicacionaes@msc.es

Dirección General de la Industria Agroalimentaria y Alimentación
Ministerio de Agricultura, Pesca y Alimentación
Ministry of Agriculture, Fisheries and Food
Paseo de Infanta Isabel, 1
28014 Madrid
Tel: 34-91 347 5361
Fax: 34 – 91 347 5770
http://www.mapya.es/es/alimentacion/alimentacion.htm

Portugal

Trade Associations

APED-Associação Portuguesa de Empresas de Distribuição
(Portuguese Association of Distribution Companies)

Campo Grande, 285-5º
1700-096 Lisboa
Tel: 351-21-751-0920
Fax: 351-21-757-1952
www.aped.pt
ARESP-Associação da Restauração e Similares de Portugal
(Portuguese Associations for HRIs Sector)

Av. Duque d'Avila, 75
1000 Lisboa
Tel. 351-21-352-7060
Fax: 351-21-354-9428
Email: aresp@aresp.pt
www.aresp.pt

FIPA-Federação das Indústrias Portuguesas Agro-Alimentares
(Federation of the Agro-Food Portuguese Industries)

Av. António José de Almeida, 7-2º
1000-042 Lisboa
Tel: 351-21-793-8679
Fax: 351-21-793-8537
Email: info@fipa.pt
www.fipa.pt

Government Agencies

Autoridade de Segurança Alimentar e Económica
(Portuguese Food Safety Authority)
Av. Conde Valbom, 96
1050 LISBOA
Tel. 351-21-798-3600
Fax: 351-21-798-3834
Email: direccao@dgfcqa.min-agricultura.pt
www.dgfcaq.min-agricultura.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
Rua da Alfandega, No. 5 r/c
1149-006 Lisboa
Tel. 351-218813700
Fax: 351-218813990
Email: dgaiec@dgaiec.min-financas.pt
www.dgaiec.min-financas.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
Direcção de Serviços do Licenciamentos **(Import Certificates)**
R. Terreiro do Trigo
Edif. Alfândega
1149-060 Lisboa
Tel. 351-218814262
Fax 351-218814261
Email: dsl@dgaiec.min-financas.pt
www.dgaiec.min-financas.pt

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