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Iberian Peninsula (Spain and Portugal)

Exporter Guide

Annual

2006

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Report Highlights:
The Iberian Peninsula Guide for U.S. food exporters willing to target the retail, HRI and food processing sectors. (MG25LJ5)

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

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SECTION I. IBERIAN PENINSULA MARKET OVERVIEW

SPAIN ECONOMIC TRENDS

	2002	2003	2004	2005	2006*	2007**
ECONOMIC TRENDS						
Inflation (%)	4.1	2.6	3.2	3.4	**3**	**3**
Unemployment (%)	12.4	11.7	11.0	8.7	**8**	**8**
GDP at Market Prices (%)	2.1	2.4	3.1	3.4	**4**	**4**
GDP per Capita (EUROS)	16,586	17,442	19,388	25,504	**27,574**	**29,569**
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	18,327	22,284	25,868	26,670	**27,893**	**29,729**
Total U.S. Agricultural, Fish and Forestry Products	1,132	1,310	1,302	1,199	**1,265**	**1,286**
Total Food Products	15,960	19,433	22,811	23,653	**24,730**	**26,444**
Total U.S. Food Products	899	1,050	1,050	951	**1,011**	**1,028**
Total Fish and Seafood Products	3,763	4,620	4,923	5,068	**5,268**	**5,526**
Total U.S. Fish and Seafood Products	62	80	83	77	**83**	**86**
RETAIL SECTOR (2)						
No. of Retail Stores	59,076	56,913	54,255	51,962	**49,797**	**47,688**
Total Retail Sales ($ Million)	59,159	61,829	66,134	70,401	**74,436**	**78,954**
Retail Sales Share by Type of Store (%)						
Hypermarkets	17.5	17.6	17.4	17.2	**17**	**17**
Supermarkets	42.3	42.4	43.8	45.0	**46**	**47**
Traditional Stores	30.8	30.1	29.8	29.3	**29**	**28**
Others	9.4	9.9	9.0	8.5	**8**	**8**

(1) GTA
(2) Sector Magazines
(*) Estimates
(**) Forecast

Spain enjoys a long-standing and wide-ranging bilateral relationship with the United States and has traditionally been a good export market for U.S. production. The country has a number of sales channels ranging from traditional distribution methods, in which wholesalers sell to small shops that sell to the public, to large multinational supermarkets and retail-stores. Department stores, hypermarkets, shopping centers and very specialized outlets are introducing the customer fidelity concept, which usually involves issuing of client cards, cumulative discounts and special offers for frequent customers. New selling techniques are becoming very popular. Vending machines have spread throughout Spain in the last decade. Direct marketing by mail order, telephone, TV or electronic commerce is growing considerably.

The EU establishes the rules and regulations governing production, trade, and labeling in Spain. If an American exporter is already exporting to any other EU country, then more than likely they already meet most of the requirements for exporting to Spain. The key for a U.S. exporter wishing to enter this market is to appoint an agent or distributor or to establish a subsidiary. A representative in Spain will likely know the different consumption patterns and preferences in each of the country's 17 autonomous regions. The Office of Agricultural

Affairs in Madrid and in Lisbon is dedicated to helping U.S. exporters access the Spanish market. Please contact us at:

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-915872555
Fax: 34-915872556
email: AgIberia@usda.gov
http://www.embusa.es/

American Embassy, Madrid
Serrano, 75 – Box 20
28006 Madrid
Spain

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

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

Market opportunities for U.S. treenuts, seafood products, high-value consumer foods exist in Spain. Below are key points regarding the market:

- Sales channels range from traditional distribution methods to large multinational supermarkets and retail-stores.
- Department stores, hyper and supermarkets, shopping centers and very specialized outlets are introducing the customer fidelity concept.
- Direct marketing by mail order, telephone, TV or electronic commerce is growing considerably.
- Vending machines have spread throughout Spain in the last decade.

PORTUGAL ECONOMIC TRENDS

	2002	2003	2004	2005	2006*	2007**
ECONOMIC TRENDS						
Inflation (%)	3.6	3.3	2.4	2.3	**2.7**	**2.5**
Unemployment (%)	5.1	6.3	6.7	7.6	**8.2**	**7.8**
GDP at Market Prices (%)	0.5	-1.1	1.1	0.4	**0.8**	**1.2**
GDP per Capita (USD$)	18,434	18,311	18,067	17,947	**18,104**	**18,274**
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	5,704	6,677	7,467	7,912	**9,053**	**9,561**
Total U.S. Agricultural, Fish and Forestry Products	275	292	289	296	**303**	**307**
Total Food Products	4,927	5,874	6,558	7,037	**8,119**	**8,612**
Total U.S. Food Products	233	241	234	236	**237**	**237**
Total Fish and Seafood Products	921	1,065	1,183	1,295	**1,387**	**1,468**
Total U.S. Fish and Seafood Products	27	28	41	52	**64**	**72**
RETAIL SECTOR (2)						
No. of Retail Stores	25,995	25,454	24,918	23,656	**23,161**	**22,811**
Total Retail Sales ($ Million)	12,001	12,538	13,017	13,720	**14,289**	**14,930**
Retail Sales Share by Type of Store (%)						
Hypermarkets	34.7	34.3	32.6	32.0	**31.5**	**31.0**
Supermarkets	48.6	49.5	51.5	52.5	**54.0**	**55.0**
Self-Service	6.6	7.1	7.3	7.6	**7.5**	**7.0**
Food Shops	0.8	0.7	0.6	0.5	**0.5**	**0.5**
Grocery Stores	9.3	8.4	8.0	7.2	**6.7**	**6.5**

(3) GTA
(4) Sector Magazines
(*) Estimates
(**) Forecast

For U.S. firms, Portugal's emergence as a full partner in Europe has meant a stable location open to foreign investment and an increasingly attractive market for exports. Portugal is an independent European market of ten million people that is somewhat under-served by U.S. suppliers and exporters because it is not one of the large European countries. Though not among the leading markets for U.S. agricultural products and despite the fact that Portugal does not rank at the top of the lists of new markets to explore, U.S. exporters should not ignore the Portuguese market.

In Portugal, modern sales techniques still coexist with some traditional practices. Modern sales techniques are generally accepted and effective but traditional values continue to be respected. Many businessmen still consider personal contact and a handshake stronger than a contract, but they will not be offended if a formal contract is requested. Most sales channels cover the entire territory so multiple distributors are generally not necessary. Distribution centers tend to be located in Lisbon in the south and Porto in the north. However, many large importers and wholesalers have branch sales offices and/or sub-agents or dealers in the principal cities and towns, including those of the Portuguese islands of Madeira and the Azores.

As a fully integrated member of the EU, Portugal abides by the rules and regulations governing the EU. If an American exporter is already exporting to any other EU country, then more than likely the exporter already meets most of the requirements for exporting to Portugal. To expedite marketing, U.S. exporters must contact Portuguese importers and/or distributors. The Office of Agricultural Affairs in Lisbon and Madrid is dedicated to helping U.S. exporters access the Portuguese market. Please contact us at:

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 LISBOA
Portugal

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-915872555
Fax: 34-915872556
email: AgIberia@usda.gov
http://www.embusa.es/

American Embassy, Madrid
Serrano, 75 – Box 20
28006 Madrid
Spain

Market opportunities for U.S. treenuts, seafood products, high-value consumer foods exist in Portugal. Below are key points regarding the market:

- Portuguese purchasing habits have changed in the last couple of decades: Portuguese super and hypermarket chains as well as European multinational chains like Carrefour, Auchan, Intermarche, El Corte Ingles are developing rapidly.

- Portuguese consumers are willing to pay a higher price if the product invokes health, convenience, etc. benefits. The decisive selling factors are:
  - Price versus quality relationship (70 percent);
  - Be health beneficial (53 percent); and
  - More “natural” (44 percent).

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

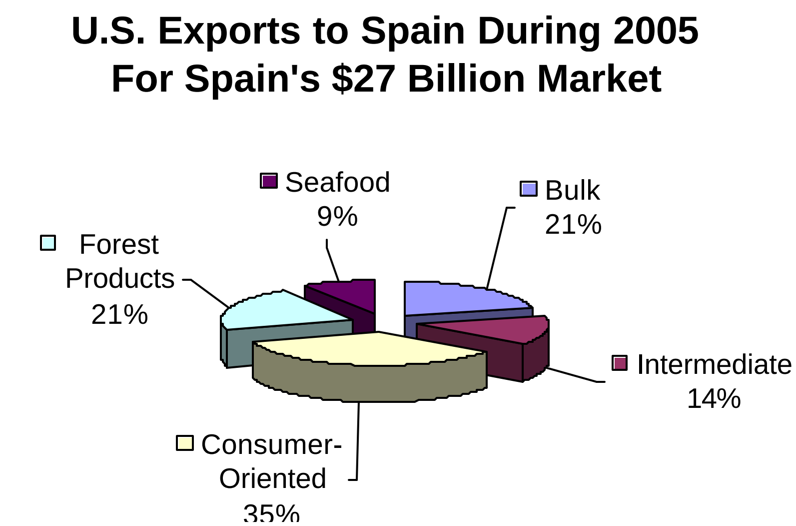
SPAIN

Advantages	Challenges
Growing niche markets such as ethnic foods.	High marketing costs (advertising, discounts, etc.) are necessary.
Interest in high-quality products.	Competition with similar food products produced in other EU countries that enter tariff free.
High consumer interest in new products.	Potentially higher shipping costs from the U.S.
Relative weakness of U.S. Dollar.	Supermarket and hypermarket shelf space is expensive.
Reduced fish catch from European waters while consumer demand remains strong.	Reluctance to purchase products containing genetically modified ingredients.
Modern food distribution system.	EU labeling and packaging laws.

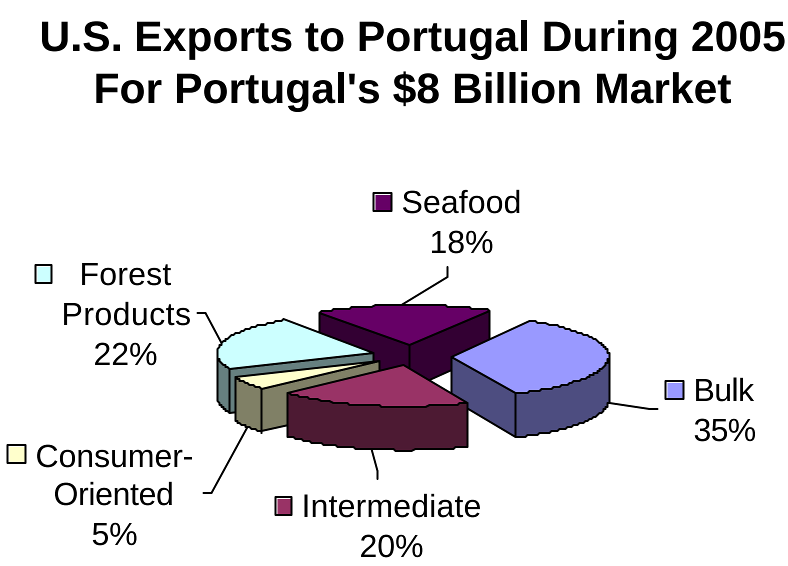
PORTUGAL

Advantages	Challenges
Portugal is a net importer of food and agricultural products.	Importers still have limited knowledge regarding the quality and supplies of U.S. food and agricultural products.
Domestic distribution systems are efficient.	High marketing costs (advertising, discounts, etc.) are necessary.
Food products in the market are becoming more diversified.	Competition from neighboring EU countries is fierce.
Overall sales of consumer-ready food products have increased substantially in the last years.	U.S. exports face higher transportation costs and difficulties in shipping mixed or smaller container loads.
Access the Portuguese market through multinational chain like Carrefour, Auchan and El Corte Ingles	Supermarkets and hypermarkets shelf space is extremely expensive.
Consumers are more health conscious, and tastes are becoming more sophisticated.	U.S. suppliers, determined to maintain market share, may need to conduct annual promotion activities.
Greater disposable income and an impulse to buy makes Portugal an attractive market.	Importers prefer to take delivery on short notice to avoid storage charges.

Iberian Peninsula Market for U.S. Agricultural Products

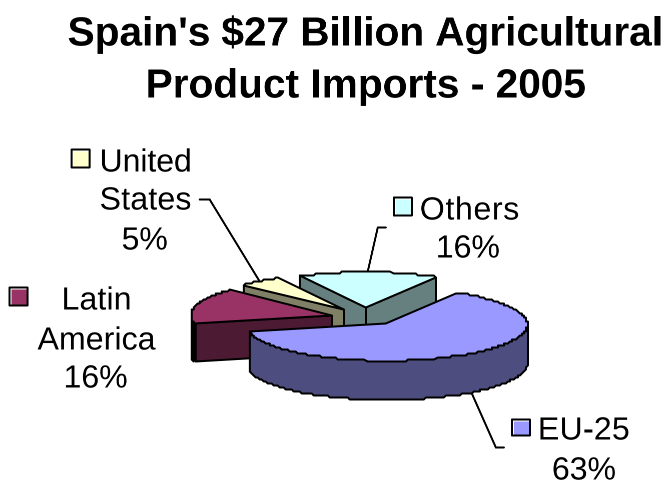


SOURCE: BICO

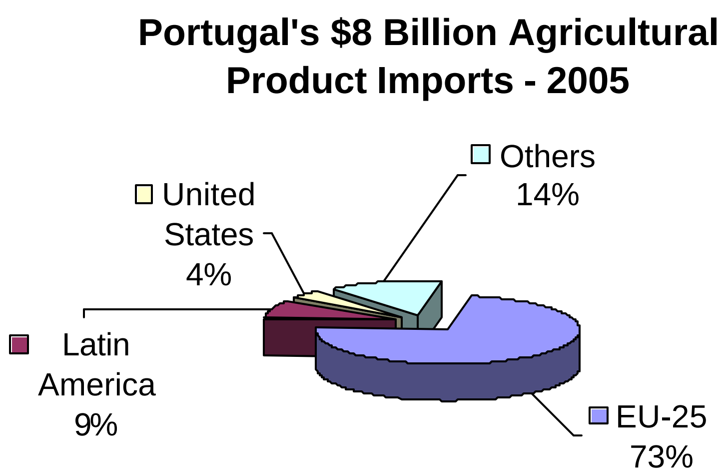


SOURCE: BICO

Competition for Iberian Peninsula Market for Imported Agricultural Products



SOURCE: Global Trade Atlas



SOURCE: Global Trade Atlas

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

Success in introducing your product in the Iberian Peninsula market depends on acquiring local representation and making personal contact. The advantages of local representation include market knowledge, up-to-date information and guidance on business practices and trade laws, sales contacts, and market development expertise.

Spain has a number of sales channels ranging from traditional distribution methods, in which wholesalers sell to small shops that sell to the public, to large multinational supermarkets and retail-stores. However, personal relationships are still very important, especially within smaller organizations. There is no substitute for face-to-face meetings with Spanish business representatives to break into this market.

The decision-making process within a Spanish company may be different from that in the United States. An initial "yes" usually means that the company will study the situation, and not necessarily that they will buy the product. Once a deal is struck, the Spanish company will likely expect the U.S. firm to translate into Spanish all commercial brochures, technical specifications and other relevant marketing materials. Decision makers at the Spanish firm may speak English, but the paperwork should come in Spanish.

The Spanish market is made up of a number of regional markets serviced by two major hubs, Madrid and Barcelona. The vast majority of agents, distributors, foreign subsidiaries and government-controlled entities that make up the economic power block of the country operate in these two hubs. Dealers, branch offices, and government offices found outside these two hubs will almost invariably obtain their supplies from their Madrid and Barcelona contacts rather than engage in direct importation.

In Portugal, while modern sales techniques are becoming more prevalent, many business people still prefer personal contact as a way of doing business rather than just via email, fax or phone. English is a widely spoken second language in Portugal, and U.S. exporters can expect to conduct their meetings with contacts in English.

Large importers and wholesalers have branch sales offices and/or sub-agents or dealers in the principal cities and towns, with main offices concentrated in Porto and Lisbon. Typically, food products are imported by an importer, broker and/or a distributor.

General Consumer Tastes and Preferences

The traditional Iberian Peninsula diet is the co-called “Mediterranean Diet”, which is based on seafood, meat, vegetables, salads, fresh fruits, olive oil and wine, is being challenged. As consumers have less time for food preparation, the Iberian Peninsula market is increasingly characterized by a trend towards more novelties and specialities, less basic foodstuffs, more “natural” and delicatessen foods, more prepared and ready to eat products favoring convenience. Consumers are also increasingly responding to high quality and attractive packaging. Influenced by constant advertising in the daily and weekly press and TV, consumers tend to follow fashionable trends, use new products and adopt new consumption habits. Increasing travel abroad by Portuguese and Spaniards, as well as a growing influx of foreign tourists into the Iberian Peninsula, is also increasing demand for new products and an interest in ethnic foods, in particular. In addition, Iberian Peninsula consumers are health conscious about food. Problems or potential problems concerning food safety are widely publicized and usually receive immediate attention from government agencies.

Food Standards and Regulations

For more information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standard Report for the Iberian Peninsula, SP6018 and PO6009. This report should be read in conjunction with the equivalent report done by the FAS Office in the U.S. Mission to the European Commission (USEU), E36098.

For detailed information on the EU-harmonized certification requirements, please consult PO6011, SP6021 and the EU-25 FAIRS report E36071. Under this report, you may find information on the U.S. competent authority that is authorized to issue the food and agricultural import certificates required by the European Union.

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.

Iberian Peninsula Market Access Reports

We have also developed Iberian Peninsula Market Access reports for fishery product, tree nuts products and pulses products, as follows:

Spain
- Fishery product, SP5037, Market Access for Fishery Products
- Tree nuts products, SP6002, Market Access for Tree Nuts
- Pulses products, SP6017, Market Access for Pulses.

Portugal
- Fishery product, PO5023, Market Access for Fishery Products
- Tree nuts products, PO6002, Market Access for Tree Nuts
- Pulses products, PO6007, Market Access for Pulses.

General Import and Inspection Procedures

Portugal and Spain use the Harmonized Nomenclature and Classification System (HS) and apply import duties according to a maximum and minimum rate schedule. The minimum tariff rate is applied to goods originating in countries entitled to the benefits of most-favored nation treatment (that is, members of the WTO and countries with which the EU has signed trade agreements) including the United States. However, the EU has negotiated free-trade agreements, providing in many cases tariff-free access to the European market, which can leave the U.S. exporter at a disadvantage.

The local importer is the first responsible to either the Portuguese Government or the Spanish Government of imported food products when they enter the Portuguese or the Spanish territories. Therefore, the Portuguese or the Spanish agent/importer should guide you through the whole process to market your product in either Portugal or Spain.

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

Bill of Lading and/or Airway Bill
Commercial Invoice
Phytosanitary Certificate and/or Health Certificate when applicable
Import Certificate

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

Please keep in mind that if the product you are exporting into the Iberian Peninsula does not comply with EU harmonized regulations, Portuguese and/or Spanish customs or health authorities may not allow entry of the product.

For more information on import and inspection procedures in the Iberian Peninsula, please see Food Standards and Regulations within this report.

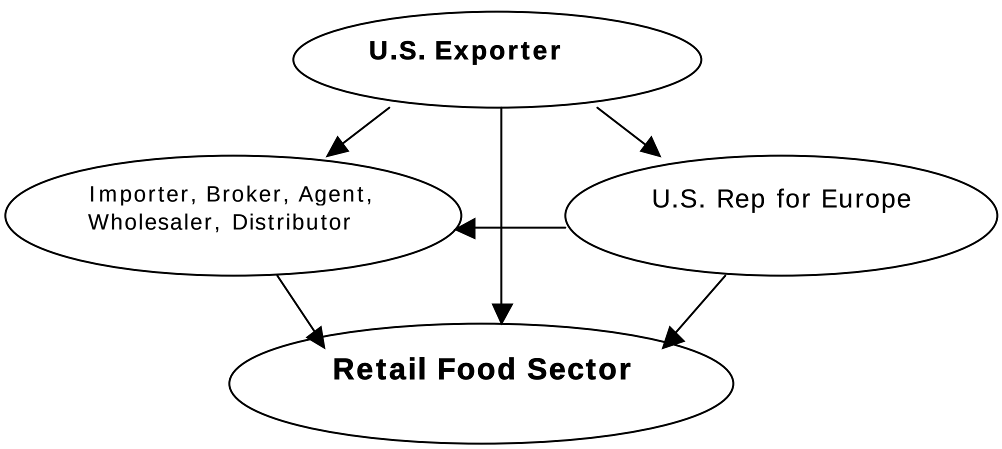
SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Food Retail Sector

The Iberian Peninsula (IP) retail food market is diversified. Hypermarkets/supermarkets, convenience stores, major discount stores and specialized stores coexist with the traditional corner grocery stores and open-air markets, even though the total number of retail outlets has decreased significantly in the last decade.

- In Spain and Portugal, hyper and supermarkets account for 60 percent of total food sales.
- There is increasing competition in the scope and range of product offerings, including ready-to-eat and/or ready-to-cook foods, take away meals, and home delivery and the prices and services retailers offer consumers.
- An increasing supply of imported products has intensified competition among suppliers and retailers.
- EU Member States are the first suppliers of imported consumer-ready products, including seafood.

Market Structure:



For more information on the Iberian Peninsula Retail Food Sector, please consult the retail sector reports for Spain, SP5039 and for Portugal, PO5024.

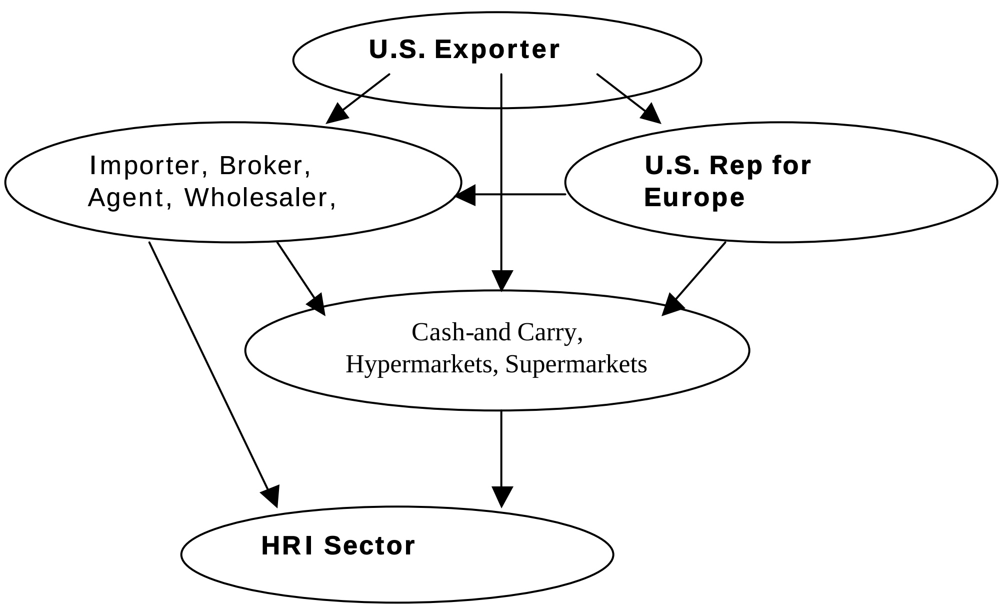
HRI Sector

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.

Market Structure:



For more information on the Iberian Peninsula HRI Sector, please consult the HRI sector reports for Spain, SP6008 and for Portugal, PO6003.

Food Processing Sector

The Iberian Peninsula food-processing sector modernized and expanded significantly during the last couple of decades. With integration into the European Union in 1986, the Iberian Peninsula food-processing sector began a profound modernization in order to adapt to new EU requirements. Spain and Portugal now have some of the most competitive food processing industries in Europe, which makes this sector an important target for U.S. food-ingredient exporters.

The Iberian Peninsula food-processing sector in summary:

- Modern, with special attention to the quality, safety, and traceability of the food products it produces.

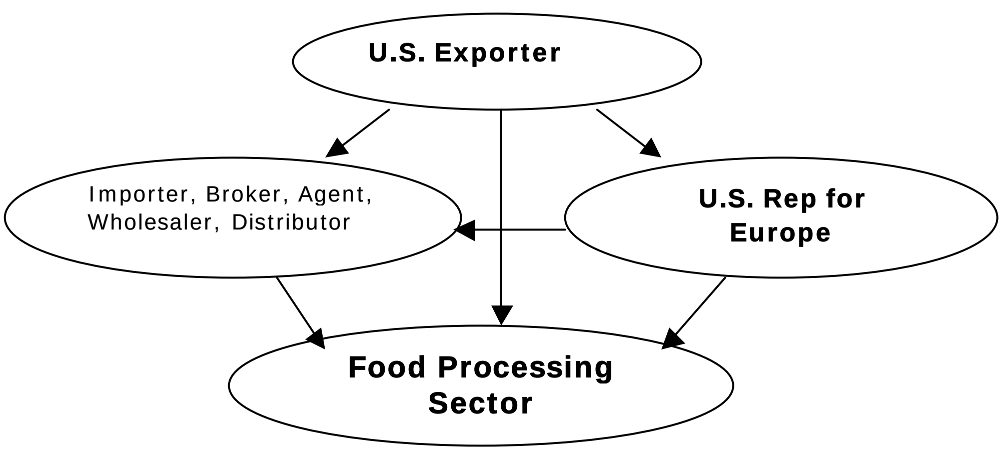
In Spain this sector:

- Generates just under 20 percent of Spain's total industrial production, accounting for just over eight percent of the national gross domestic product and providing almost 450,000 jobs;
- Is comprised of mostly small companies--about 97 percent of the 32,585 food processors employ less than 50 people; 820 employ between 50 and 200 people; 185 employ between 200 and 500 people; and only 67 food processors employ more than 500 people; and,
- Produces an estimated € 65 billion in product, of which € 13 billion is exported.

In Portugal the food-processing sector:

- Generates about 16 percent of Portugal's total industrial production, accounting for about nine percent of the national gross domestic product and providing an estimated 110,000 jobs;
- Is dominated by even smaller companies—only 11 percent of the 8,500 food processors employ more than 20 people, accounting for about 2/3 of the sector manpower and about 85 percent of the € 12.5 billion in product produced. Just over €1 billion of the final product is exported.

Market Structure:



For more information on the Iberian Peninsula food processing sector, please consult the food processing sector report for Spain, SP6009 and Portugal, PO6004.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Tree Nuts
Fish and Seafood, fresh and frozen
Forest Products
Pulses

SECTION V. KEY CONTACTS AND FURTHER 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
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1600-081 Lisbon
Portugal

Please consult our home page for more information on exporting U.S. food products to the Iberian Peninsula. 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, 5 dcha.
28001 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.mapa.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

Direcção Geral de Fiscalização e Controlo da Qualidade Alimentar
(General Directorate for Control of Food Quality)
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

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(General Directorate for Customs and Special Taxation on Consumption)
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For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov.

APPENDIX I. STATISTICS

Spain's Key Trade and Demographic Information

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1/] - **2005**	**$26,670/5%**
Consumer Food Imports From All Countries($Mil)/U.S. Market Share (%) [1/] **2005**	**$23,653/4%**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) [1/] - **2005**	**$5,068/1.5%**
Total Population (Millions) / Annual Growth Rate (%) - **2005**	**44.1/2.1%**
Urban Population (Millions) / Annual Growth Rate (%) - **2005**	**14.6/0.013%**
Number of Major Metropolitan Areas	**4**
Per Capita Gross Domestic Product (Euros) - **2005**	**€25,504**
Unemployment Rate (%) - **2005**	**8.7%**
Per Capita Food Expenditures (Euros) - **2005**	**€1,307**
Percent of Female Population Employed - **2005**	**40.56%**
Exchange Rate (US$1 = 1 Euro) - **2005**	**€0.80**

1/ Source: Global Trade Atlas

Portugal's Key Trade and Demographic Information

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1/] - **2005**	**$7,912/4%**
Consumer Food Imports From All Countries($Mil)/U.S. Market Share (%) [1/] **2005**	**$7,037/3%**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) [1/] - **2005**	**$1,295/4%**
Total Population (Millions) / Annual Growth Rate (%) - **2005**	**10.3/1%**
Urban Population (Millions) / Annual Growth Rate (%) – **2005**	**3.5/0.5%**
Number of Major Metropolitan Areas	**2**
Per Capita Gross Domestic Product (Euros) - **2005**	**€14,996**
Unemployment Rate (%) - **2005**	**7.6%**
Per Capita Food Expenditures (Euros) - **2005**	**€1,162**
Percent of Female Population Employed - **2005**	**47%**
Exchange Rate (US$1 = 1 Euro) - **2005**	**€0.80**

1/ Source: Global Trade Atlas

Spain's Food Imports

Spain Imports (In Millions of Dollars)	Imports from the World 2002	Imports from the World 2003	Imports from the World 2004	Imports from the U.S. 2002	Imports from the U.S. 2003	Imports from the U.S. 2004	U.S Market Share % 2002	U.S Market Share % 2003	U.S Market Share % 2004
CONSUMER-ORIENTED AGRIC. TOTAL	6,234	7,839	N/A	211	273	N/A	3	3	N/A
Snack Foods (Excl. Nuts)	390	490	N/A	1	1	N/A	0.08	0.13	N/A
Breakfast Cereals & Pancake Mix	71	106	N/A	1	1	N/A	0.04	0.05	N/A
Red Meats Fresh/Chilled/Frozen	528	683	N/A	0	0	N/A	0	0	N/A
Red Meats Prepared/Preserved	130	175	N/A	1	1	N/A	0.06	0.01	N/A
Poultry Meat	148	185	N/A	0	0	N/A	0	0	N/A
Dairy Products (Excl. Cheese)	729	918	N/A	1	1	N/A	0.02	0.03	N/A
Cheese	456	578	N/A	0	1	N/A	0	0.01	N/A
Eggs & Products	35	51	N/A	3	2	N/A	8	3	N/A
Fresh Fruit	555	803	N/A	1	1	N/A	0.14	0.08	N/A
Fresh Vegetables	249	347	N/A	2	1	N/A	0.84	0.42	N/A
Processed Fruit & Vegetables	613	686	N/A	5	6	N/A	0.84	0.92	N/A
Fruit & Vegetable Juices	134	171	N/A	3	1	N/A	2	0.85	N/A
Tree Nuts	279	371	N/A	148	200	N/A	53	54	N/A
Wine & Beer	221	283	N/A	1	1	N/A	0.29	0.18	N/A
Nursery Products & Cut Flowers	172	223	N/A	3	5	N/A	2	2	N/A
Pet Foods (Dog & Cat Food)	110	145	N/A	12	13	N/A	11	9	N/A
Other Consumer-Oriented Products	1,415	1,624	N/A	33	42	N/A	2	3	N/A
FISH & SEAFOOD PRODUCTS	3,990	4,956	N/A	63	79	N/A	2	2	N/A
Salmon	132	146	N/A	3	4	N/A	2	2	N/A
Surimi	55	74	N/A	7	12	N/A	13	16	N/A
Crustaceans	1,040	1,255	N/A	18	23	N/A	2	2	N/A
Groundfish & Flatfish	862	1098	N/A	11	11	N/A	1	1	N/A
Molluscs	766	1033	N/A	8	8	N/A	1	0.78	N/A
Other Fishery Products	1,135	1,350	N/A	14	22	N/A	1	2	N/A
AGRICULTURAL PRODUCTS TOTAL	12,530	14,248	N/A	903	965	N/A	7	7	N/A
AGRICULTURAL FISH & FORESTRY TOTAL	18,387	21,592	N/A	1,195	1,297	N/A	6	6	N/A

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Portugal's Food Imports

Portugal Imports (In Millions of Dollars)	Imports from the World 2002	2003	2004	Imports from the U.S. 2002	2003	2004	U.S Market Share % 2002	2003	2004
CONSUMER-ORIENTED AGRICULTURAL TOTAL	2,384	2,833	3,100	8	7	10	0.33	0.24	0.34
Snack Foods (Excl. Nuts)	189	236	281	1	1	1	0.20	0.13	0.11
Breakfast Cereals & Pancake Mix	49	66	77	1	1	0	0.04	0.11	0
Red Meats Fresh/Chilled/Frozen	402	511	556	0	0	0	0	0	0
Red Meats Prepared/Preserved	80	95	103	0	0	0	0	0	0
Poultry Meat	20	31	39	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	243	294	317	1	1	1	0.01	0.01	0.01
Cheese	75	91	104	1	1	0	0.10	0	0
Eggs & Products	13	17	15	0	1	1	0	0.83	0.19
Fresh Fruit	316	395	429	1	1	0	0.01	0	0
Fresh Vegetables	123	152	156	1	0	0	0	0	0
Processed Fruit & Vegetables	157	186	210	1	1	1	0.20	0.12	0.10
Fruit & Vegetable Juices	40	46	52	1	1	1	0.04	0.02	0.01
Tree Nuts	18	24	30	1	2	5	5	7	16
Wine & Beer	102	109	130	1	1	1	0.72	0.01	0.01
Nursery Products & Cut Flowers	60	73	70	1	1	1	0.27	0.12	0.15
Pet Foods (Dog & Cat Food)	67	85	94	1	1	1	2	1	1
Other Consumer-Oriented Products	431	425	438	4	3	4	0.93	0.76	0.82
FISH & SEAFOOD PRODUCTS	965	1,125	1,241	28	28	42	3	2	3
Salmon	16	16	17	1	1	1	3	4	3
Surimi	18	16	14	3	2	2	16	11	18
Crustaceans	124	137	144	1	1	1	0.26	0.20	0.04
Groundfish & Flatfish	436	486	572	24	25	38	5	5	7
Molluscs	83	116	105	1	1	1	0.19	0.16	0.53
Other Fishery Products	287	354	391	1	1	1	0.07	0.08	0.18
AGRICULTURAL PRODUCTS TOTAL	4,222	4,770	5,301	209	225	178	5	5	3
AGRICULTURAL, FISH & FORESTRY TOTAL	5,664	6,374	7,120	276	301	273	5	5	4

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Spain's Top 15 Food Suppliers

CONSUMER-ORIENTED AGRICULTURAL IMPORTS			
($1,000)	2002	2003	2004
France	1,407,866	1,807,878	N/A
Germany	773,263	939,069	N/A
Netherlands	718,322	907,475	N/A
Italy	418,635	530,183	N/A
Ireland	356,728	507,244	N/A
Belgium	290,738	354,200	N/A
Portugal	282,752	309,483	N/A
Denmark	227,900	290,242	N/A
United Kingdom	236,194	278,828	N/A
United States	211,471	272,947	N/A
Brazil	121,931	164,817	N/A
Argentina	70,836	127,562	N/A
Chile	79,175	115,189	N/A
Peru	103,705	97,346	N/A
Thailand	65,685	94,388	N/A
Other	868,495	1,041,726	N/A
World	6,233,765	7,838,649	N/A

FISH & SEAFOOD PRODUCTS IMPORTS			
($1,000)	2002	2003	2004
Argentina	308,391	470,698	N/A
Morocco	351,372	423,417	N/A
France	315,999	398,071	N/A
United Kingdom	243,766	281,929	N/A
Namibia	174,251	243,270	N/A
Portugal	189,350	214,831	N/A
Italy	153,785	189,091	N/A
Denmark	135,943	166,076	N/A
Netherlands	181,050	153,116	N/A
South Africa	116,809	148,968	N/A
Iceland	106,463	139,496	N/A
Ecuador	61,258	128,083	N/A
Falkland Islands	66,836	121,890	N/A
Chile	117,039	118,905	N/A
Norway	68,554	98,693	N/A
Other	1,399,551	1,659,955	N/A
World	3,990,440	4,956,486	N/A

Source: United Nations Statistics Division

Portugal's Top 15 Food Suppliers

CONSUMER-ORIENTED AGRICULTURAL TOTAL			
($1000)	2002	2003	2004
Spain	1,139,607	1,339,222	1,464,156
France	322,468	374,372	396,604
Germany	209,501	253,038	269,155
Netherlands	179,765	234,877	244,855
Italy	79,272	93,593	121,411
Belgium	82,877	93,083	100,605
United Kingdom	58,339	66,731	63,340
Brazil	31,546	46,484	57,697
Ireland	27,831	41,452	55,659
Costa Rica	41,661	52,302	51,281
Denmark	34,550	39,293	42,371
Ecuador	22,497	27,054	34,039
Thailand	11,204	18,534	25,060
Chile	13,326	17,022	21,003
Argentina	11,838	13,549	19,904
Other	118,115	122,793	132,924
World	2,384,401	2,833,427	3,100,089

FISH & SEAFOOD PRODUCTS - 700			
($1000)	2002	2003	2004
Spain	354,296	478,720	492,286
Russian Federation	60,546	83,096	101,591
Sweden	20,944	33,195	90,060
Denmark	66,329	62,462	77,400
Netherlands	37,715	51,312	69,720
Norway	88,529	57,028	56,142
France	36,391	46,646	55,654
Iceland	78,142	50,207	48,235
United States	27,526	27,682	41,719
South Africa	17,657	23,921	25,187
United Kingdom	14,972	17,125	20,281
Germany	21,831	20,087	18,035
Mozambique	20,183	21,299	17,233
Brazil	3,598	8,327	12,856
India	11,473	13,110	11,948
Other	105,089	130,522	103,139
World	965,220	1,124,733	1,241,494

Source: United Nations Statistics Division