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Portugal

Market Brief Report

Portugal's HRI Sector

1999

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U.S. Embassy
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Report Highlights:
After growing significantly in the past two decades, expansion in Portugal's HRI sector is forecast to slow in the future. Currently, dominated by traditional restaurant outlets, the sector is expected to become more concentrated and specialized, with chain restaurants playing a more prominent role. While EU trade barriers limit opportunities for U.S. exporters in the HRI sector, certain products have potential, and these are identified in the report.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Lisbon [PO1], PO

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Summary

Portugal’s HRI sector expanded significantly during the 80's and early 90's due to social and economic changes, particularly the entry of more women in the labor force. The national restaurant association (ARESP) reports that the total number of restaurant units rose from 30,000 some 20 years ago to a total of 90,000 at present. Restaurant sales are currently estimated at about $3.92 billion (bars & night clubs excluded). The sector is highly saturated now, and HRI growth is expected to slow in the future. However, the sector is expected to become more concentrated and specialized, with restaurant chains and international brands gaining a larger share of the market to the detriment of smaller and traditional establishments.

Accounting for 605.5 billion Pte ($3.22 billion) in annual sales, Restaurants are the leading sub-segment of the HRI sector. Largely dominated by traditional restaurant types, this group is forecast to expand at a 2.2% yearly rate in the next 3 to 5 years. Standardized restaurant chains, currently accounting for 7% of the total number of units, are expected to expand considerably in the future, capturing specific market segments and capitalizing on internal economies of scale. Accounting for 131 billion Pte ($697 million) in annual sales, Collective/Institutional Restaurants are expected to expand very moderately over the medium-term. Professional catering is also expected to expand, displacing state and private non-specialized management of cafeteria and canteens.

The importance of the sector in Portugal and the continued specialization and growing level of management expertise among HRI leaders makes this an important area for food exporters to study and to target. However, among the variety of food products demanded by the HRI sector, several face high EU import tariffs and other trade barriers. Nonetheless, U.S. exporters could develop opportunities in certain areas, namely: seafood, pulses, sauces and spirits.

1 USD = 188 Pte

Portugal Economic Overview

Twenty-five years ago, Portugal was considered the “poor man” of Europe. The revolution of 1974, however, spawned fundamental economic and social changes, and since joining the European Union in 1986, Portugal has been rapidly closing the gap with its wealthier European neighbors. Since 1993, the country has experienced broad-based economic growth with an estimated 3.5% growth in GDP in 1998 and projected growth of 3.0% for 1999.

In January 1999, Portugal joined 10 other EU countries to form the European Monetary Union, fixing their exchange rates and transferring monetary policy to the European Central Bank. As a result of measures taken to qualify for EMU, Portugal has experienced falling inflation and interest rates over the last several years. These, in turn, have generated a boom in consumer spending. Moreover, unemployment in Portugal has fallen from 7.3% to 4.8% over the last two years.

While Portugal’s inflation rate has fallen dramatically over the last few years, it remains significantly above the EU average. Consumer prices in Portugal in January 1999, were 2.7% above those of a year ago, compared to 0.8% for the Eurozone average. While Portugal can be expected to have a somewhat higher inflation rate as wages and prices converge with its richer European partners, some analysts fear that continued higher inflation rates could hurt Portugal’s competitiveness within Europe.

Portugal has also been running a growing merchandise trade deficit. This is offset, somewhat, by receipts from tourism, remittances from Portuguese workers abroad, and net transfers from the EU. However, the country has been running a current account deficit since 1994 (estimated to equal 8 percent of GDP in 1998) which has been largely financed by changes in the short term foreign assets of Portuguese banks.

Portugal’s mid-term fiscal policy (1998-2000) will focus on improved management and control of public expenditure and the Finance Ministry forecasts a reduction in the fiscal deficit to 1.5 percent of GDP by 2000. The plan, in addition, supports structural reforms in areas such as social security, health, and tax administration. Portugal has also pursued an aggressive privatization plan for State-owned companies. Between 1988 and 1997, the country’s share of GDP attributable to state-owned enterprises fell from 19.4 percent to 5.8 percent. Portugal expects to sell off an additional 2.7 billion dollars in state-owned companies in 1999, including major stakes in electricity, telecommunications, paper, and energy. *(May 1999. Prepared by the Economic Section of Embassy)*

Portugal: Key Economic Indicators

	1997	1998 P	1999 E
Population (million)	9.95	9.97	9.99
GDP at current prices (Billion USD)	101.9	106.4	110.5
GDP per Capita (US Dollars)	10,241	10,672	11,062
Exchange Rates (Pte per USD)	175	180	184
Inflation	2.2	2.8	2.8

P/ Provisional; E/ Estimate. Sources: Bank of Portugal, National Statistics Institute INE, Embassy estimates.

The Restaurant Sector in Portugal

Public Restaurants

General

The Public Restaurant group represents the bulk of the business volume of the HRI sector. This group includes traditional restaurants as well as modern restaurant types, including fast food and self-service chains. This category excludes restaurants of a collective or institutional nature, which belong to the so-called "Collective Restaurant" group, covered in a different section (see below). Bars are not included either.

Public Restaurants can be further sub-classified into different basic sub-groups as listed below, of which the "Restaurants" and "Snack-Bar" sub-groups stand out, accounting for 422 out of the 605.5 billion Pte/year total business value of the group. Key financial indicators and sub-segments are provided in Tables below.

Public Restaurants: Key indicators in 1997

Number of Units	65,810 Restaurants
Business Value	605.5 Billion PTE
Number of Meals Served	632.0 Million Meals

SOURCE: INFORTEC

Public Restaurants: Sub-Segments

Restaurants
Snack-bars
Coffee shops
Pastry Shops
Hotel Restaurants

Due to social changes, most notably the massive entry of women into the labor force, restaurant numbers boomed during the 80's and the 90's. Growth is expected to slow over the medium-term, with estimates pointing to an average 2.2% growth rate in the number of meals served in restaurants through 2005. However, the different sub-groups are expected to experience different growth rates, with the "Restaurant" category expected to grow at the lowest rate, while the "Snacks", "Coffee Shops" and "Pastries" segments expected to expand at the highest growth rates. Hotel restaurants are forecast to grow at the sub-sector average of 2.2%.

Another important trend is the significant increase in restaurant chains and brands to the detriment of traditional restaurants, which still accounting for an estimated 93% of total units. The economies of scale inherent to large organizations, standardized services and marketing, and specific market focus have resulted in the success of many chains that have entered the market over the past decade. Most of these chains operate under franchising arrangements. These chains, which accounted for only 7% of total number of units in 1998, offering common menus and standardized quality and service are expected to expand considerably in the future. Other EU countries have a higher proportion of chains in their restaurant segment, and Portugal's sector is expected to gradually evolve to become more in line with the EU norm.

Restaurant chains here are classified in three main groups: (a) Restaurants with Table Service, (b) Self-Service; © Fast Food chains.

Restaurant Chains

Key Chains of Restaurants with table service:

International chains predominate in this area (see below), though local companies have also developed. The main protagonist of the expansion of chains in this area has been IBERSOL, part of the Portuguese distribution giant SONAE. Among most important developments scheduled for 1999 is the introduction of the "Thank God It's Friday" chain by IBERSOL.

PORTUGAL: Leading Restaurant Chains with Table Service

Chain Name	Observation
IBERSOL	Pizza Hut chain, linked to the Portuguese SONAE Group
Mauritânea	Beer and seafood houses, Brazilian style meat houses in Lisbon & Oporto
Cantinho Regional	3 traditional Portuguese food houses in Lisbon
Joshua's Schwarma	Israeli food

SOURCE: INFORTEC

Self-Service

Self-service chains (11.5 billion Ptes/year) are owned by large hyper-market chains, located mostly in shopping centers developed around those same large hyper-markets. Self-service chains are expected to expand moderately over the medium-term future in association with the expansion of hyper-markets in Portugal. Main self-service chains are indicated in Table below.

Leading Self-Service Chains in Portugal

Chain Name	Observation
NOVOREST	Associated to leading wholesaler hyper-market chain MAKRO
SOLNAVE	Associated to the development of *Pão de Açúcar* (Auchan Group)

SOURCE: INFOTEC

Fast Food

Among the fastest growing restaurant segments, "Fast Food" accounted for about 20 billion Pte of business in CY-1997. About 56% of fast food units are located in the Lisbon region. Many factors have led to the "fast food" expansion, including those related to the eating habits of the younger generations, the expansion and modernization of transportation and services (with an impact upon service areas), etc. Key chains operating in Portugal are given below:

Portugal: Leading Fast Food Chains

Chain	Observation
Mcdonalds	
“Companhia das Sandes”	
IBERSOL	Opened in 1986. Currently represents following Fast-Food Labels: , “Pasta Caffe”, , “Pizza Hut” (*), , “KFC”, , “Ao Kilo”, , “Goodie’s, , “Pans & Company”, , “Frangão”, , “IBER”)

(*) “Pizza Hut” is present in the market in three forms: “Eat-in”, in which it is market leader, “delivery” and “slice” (fast-food).

International chains have also introduced some new products to reflect local consumption preferences and national companies have also been developed recently to feature local favorites. A broad range of different ethnic foods are also available, with a few chains specializing in Tex-mex, Japanese, Italian or Israeli foods. But the presence of these types of chains is still relatively minor.

The delivery service concept has had remarkable success. The market leader, Spain’s Telepizza, reports 42% growth in sales in 1998. Further, it launched the first of a new chain of take-away grilled food outlets in 1998 (TeleGrill), and five more units are planned to open in 1999. Other 1998 news in the delivery/take-way area was the opening of the first “Domino’s Pizza” unit, to be followed by seven others in 1999, as well as the launching of the first Chinese food chain, “TeleChina”. Sandwiches and salad outlest have experienced slower growth due to local consumption preferences. However, it is also expected to continue to grow to explore an expanding segment of “lighter” fast-food consumers. Subway was the first to enter the Portuguese market, having been followed by Pans & Company, Bocatta, Blimpie, and more recently the Portuguese “À mesa com Trigo,” which offers salads, natural juices and tarts in a rustic style environment. Leading restaurant chains, including fast-food and chains with table service, are ranked in table below. New outlets established in 1998 are given in a separate table.

Portugal: Leading 5 Restaurant Chains

Company Name	Date of Entry	Country of Origin	Franchised Units	Total restaurants
MCDONALD'S	1991	U.S.	49	60
PIZZA HUT	1990	U.S.	-	48
TELEPIZZA	1992	Spain	11	37
JOSHUA'S SWARMA GRILL	1993	Portugal	11	18
PANS & CO.	1996	Spain	-	13

Source: INSTITUTO DE INFORMAÇÃO EM FRANCHISING

Portugal: 1998 New Fast Food Restaurants

Label	Concept	Country of Origin	Total Number of new Restaurants
Mrs. Vanellis	Italian Food	Canada	2
Made in Japan	Japanese food	Canada	2
The Taco Maker	Mexican Food	U.S.	2
Blimpie	Sandwiches & Salads	U.S.	1
Goody's	Hamburgers, pastas, sandwiches & salads	Greece	2
Steers	Multi-menu	S. Africa	1
À Mesa com Trigo	Salads, pies & natural juices	Portugal	2
Telechina	Chinese food Delivery & take-away	Portugal	2
Domino's Pizza	Pizza delivery & take-away	U.S.	1

Source: INSTITUTO DE INFORMAÇÃO EM FRANCHISING

Collective Restaurants

General

The Collective Restaurants category includes different restaurant sub-groups, which have as common a denominator their institutional organizations. Key financial indicators and sub-group listing are provided in Tables below.

Collective Restaurants: Key indicators in 1997

Number of Units	11,700 Units
Business Value	131.0 Billion Pte
Number of Meals Served	316.0 Million Meals

SOURCE: INFORTEC

Collective Restaurant organization types

Type	Description
Transportation	Highway service stations, Aeroports, Aerial Catering, Railway Stations, Railway Catering
Work	-
Schools	-
Health	-
Social	-
Miscellaneous	Armed Forces, Prisons, Religious Communities

A few private catering organizations control some 28% of the Collective Restaurant business. The bulk of the business remains State controlled and managed. However, it is expected that increasing numbers of collective restaurant units will be run under concession contracts with private companies. The need to improve quality standards and secure good quality/price ratios will encourage this trend. Private catering companies are in a better position than the State to secure these goals, as well as supply fixed-price meals.. Leading organized catering companies operating in Portugal are listed below.

Leading Catering Companies Ranked by Business Volume

Leading Catering Companies	Observation(Nationality)
GERTAL	Portuguese
EUREST	U.K. (Compass Group)
ITAU	Portuguese
ICA	Portuguese

Collective restaurants are concentrated in the populous litoral strip between Greater Lisbon and Greater Oporto. In the interior, they tend to cluster around key district capitals like *Castelo Branco*, *Évora*, *Portalegre* or *Guarda*. The "collective restaurant" group as a whole was stagnant over the 1994 to 1997 period, during which the expansion of some sub-segments, like "Health", "Social" or "Schools," was unable to off-set losses from declining sub-segments like "Labor" and "Armed Forces". A moderate expansion is forecast for the next few years, spurred by certain sub-segments clearly on the rise, like schools or elderly homes. The GOP announcement of the opening of 600 to 800 new schools, mainly *kindergarten* and primary school levels, in 1999 alone will tend to lead to an increase in this part of the HRI sector. Elderly Homes are another increasing sub-segment, in association with demographics and life-style trends. Prisons are expected to increase more moderately, while Hospital demand is expected to remain flat.

HRI Marketing Channels

Key Portuguese Restaurant suppliers

Most restaurants source from traditional wholesalers (who frequently still deliver products to the door) or from local retailers, especially in the case of fresh products. However, booming super-market and hyper-market chains have gained relevance in restaurant supply at the expense of traditional retailing. Expanding restaurant chains tend to buy their supplies centrally, often through contracts with exclusive suppliers. Finally, specialized organizations are emerging to buy in large quantities to the supplies and styles demanded by restaurants and catering units. Key restaurant suppliers are listed below.

Portugal: Distributors for Restaurants

Suppliers	Observation
Traditional Wholesalers	Often bring the products directly to their client. These include specialized distributors for frozen fish.
Local Markets	For fresh products except dairy (mostly fish and produce).
Cash & Carries	Were created to target retail shops. However, with the developments of organized distribution over the last 10 years, roughly 10,000 small retailers disappeared. The disappearance of the traditional retailing left C &Cs in difficult position, causing them to re-positioning themselves in the market by targeting more and more the restaurant business. Key Cash & Carry chains are: , MAKRO , RECHEIO , GRULA
Super markets & hyper-markets	For convenient location, good prices and other advantages.

Producers	For specific products bought locally: , Beverages (warehouses) , Large Industrial manufacturers like NESTLÉ, CPC, FIMA, CODIPROL (Heinz fruit service), ROYAL BRANDS or NABISCO.
Large Purchasing Centers	i.e. SOGENAVE (see also Channels for Collective Restaurants)

Collective Restaurants

Most catering companies are supplied by local wholesalers and super-markets, with whom they have purchasing contracts. A few specialized purchasing centers have developed to capitalize on economies of scale, of which SOGENAVE (owned by leading caterers GERTAL and ITAU) stand out. This purchase center, whose main goal is to satisfy the group's own needs, has also taken some steps supplying outside restaurants, an activity which accounts for about 20% of its total business. Another large catering organization, ICA also has a purchasing center of its own. Key suppliers are listed below in relation to the types of products sold.

Distributors used by Purchasing Centers for Collective/Institutional Restaurants

Source	**Observation**
Warehouses/ Packers	Fresh Fruit & vegetables: Fruit & vegetables are reportedly no longer bought in wholesaler markets in bulk. Leading buyer SOGENAVE further reports that occasionally it makes a "pool" with other companies to import directly.
Direct Imports (mostly from Europe).	Meat: Purchased mostly under vacuum-packed frozen and chilled forms. Leading buyer SOGENAVE reports it imports mostly from Italy.
Middlemen	Fresh fish: Purchased from middlemen who attend the primary fish markets ("lotas")
Importers	Frozen Fish: It is more expensive to buy abroad and have the fish packed than use the importers. In the case of salted cod, it can be bought from local retailers or imported in the salted wet form to be dried by the Portuguese cod drying industry.
National Industry	"Groceries" (rice, noodles, etc): Leading buyer SOGENAVE reports it normally purchases from the national food industry. However, catering firms without Purchase Center have need for people to do door-to-door distribution. GRULA and MAKRO are competitive suppliers for those cases.
Cash & Carries	

Local Manufacturers	Beverages: Bought from local manufacturers who do the distribution themselves. Key suppliers are: , CENTRALCER (beer) , UNICER (beer) , SUMOLIS , REFRIGE

Market Opportunities for U.S. Suppliers

Product Identification

The large quantities of food sold through the HRI channels make it an important sector as far as food distribution channels are concerned. Further, the trends for concentration of distribution channels and the development of international standardized food service business make marketing of specific restaurant-oriented food products easier.

As a supplier, the U.S. remains critically affected by many restrictions. Trade barriers, whether tariff or non-tariff, remain critical for a number of commodities, including most raw meat types. A series of import quotas and EU preferential trade agreements with specific countries limit US potential exports of seafood into Europe, while a mature EU food industry tends to restrict product areas in which the U.S. is a competitive exporter. Further, changing EU laws and regulations, namely as far as products containing GMOs are concerned, will tend to lead to further restrictions in the future. Finally, the high transportation costs and the fragmented pattern of purchases and demand, namely by the upper-end of the market restaurants, dims the possibility of selling certain food products into the Portuguese HRI sector.

Specific restaurant-oriented products can be promoted through restaurant and related associations, as well as through leading wholesalers and retailers (see contacts section). Diverse and ethnic products are among those with better potential, while seafood in general as well as a whole basket of “grocery” products can be successfully targeted into the HRI sector. Finally, specific market niches for expensive food products like minced salmon can also be developed, namely through Spanish-based operations handling these products in large quantities. Below are listing of potentially exportable products with current tariff rates and total and U.S. 1998 imports. For specific policy issues affecting seafood imports, please see PO8023.

Selected Product Listing

HTSCN	Product Description	Import Tariff	CY-1998 Imports (thousand USD) */	
			Total Imported from the US	Total from all origins **/
0302.69.81	Monkfish	15%	37	1,161
0303.10.00	Pacific Salmon	2%	364	732
0303.31.90	Pacific Halibut	15%	128	128
0303.60.90	Cod (Gadus macrocephalus)	12%	6,467	10,744
0303.79.55	Alaska Pollock	15%	219	219
0303.79.81	Monkfish	15%	1,954	4,599
0303.79.87	Swordfish	7.5%	25	1,545
0304.20.83	Minced Frozen Monkfish	15%	69	478
0304.90.35	Processed Cod	7.5%	139	141
0304.90.57	Processed Monkfish	7.5%	230	434
0305.62.00	Salted wet cod	13%	5,496	237,100
0305.69.90	Wet Salted tuna and others	12%	238	1,229
0306.22.10	Live Lobster	8%	22	525
0307.49	Frozen lolligo	0%	97	35,949
TOTAL SEAFOOD IMPORTS (Chapter 03 of the HTSC, except Live Fish - 0301) ***/			15,827	810,587

*/ Source: National Statistics Institute INE; **/ Includes U.S. products transhipped through other EU countries; ***/ Includes seafood for processing and seafood sold through retailing. 1 USD = 180 PTE.

Selected Product Listing (Cont.)

HTSCN	Product Description	Import Tariff	Total CY-1998 Imports (thousand USD) */	
			From the US	From all origins **/
Horticultural Products				
0713.20	Chick Peas	1%	46	5,142
0713.33.90	Beans (*Phaseolus vulgaris*)	1%	4,344	17,158
0713.39	Beans	1%	289	1,622
0713.40	Lentils	0.7%	9	273
Other Horticultural Products				
Total Horticultural Prod. (Chapter 07 of the HTSC) ***/			4,688	166,969
Fruit				
0802.12.90	Shelled sweet Almonds	4.2%	1,686	5,154
0802.50.00	Pistachios	1.7%	438	1,171
Other Fruit				
Total Fruit (Chapter 08 of the HTSC) ***/			2,396	291,057
Coffee				
0901.11	Coffee, not decaf.,not toasted)	1.7 %	19	95,609
Other Coffee Products				
Total Coffee Imports ***/			21	113,685

*/ Source: National Statistics Institute INE; **/ Includes products exported from the U.S. and transhipped through other EU countries; ***/ Includes products sold to end-consumers. 1 USD = 180 PTE.

Selected Product Listing (Cont.)

HTSCN	Product Description	Import Tariff	Total CY-1998 Imports (thousand USD) */	
			From the US	From all origins **/
Grain-Based Products				
1901.20	Bakery & Pastry Mixes	8.7% + EA	29	5,775
1902.19.90	Noodles	9.1%+251 Eur/100 Kg	8	1,562
Other Grain-based Products				
Total Grain-based Products (Chapter 19 of the HTSC) ***/			71	151,886
Horticultural-based Products				
2001.90.30	Preserved corn	6.1% + 11.2Euros/100 Kg/net eda	20	23
2001.90.96	Pickles	17.3%	5	867
2005.80	Canned corn	6.1%+11.2 Eur/100 Kg/net eda	136	11,109
2008.11.10	Peanut butter	15.2%	255	290
2009.90.98	Juices	19.1%	12	26,035
Other Hortic.-based Products				
Total Horticultural-based Products (Chapter 20 of the HTSC) ***/			440	125,787

*/ Source: National Statistics Institute INE; **/ Includes U.S. products transhipped through Other EU countries; ***/ Includes products sold to end-consumers. 1 USD = 180 PTE. EA/ Agricultural Element; different for first and second semesters of 1999; calculated on the basis of product composition. Net eda/ net drained weight.

Selected Product Listing (Cont.)

HTSCN	Product Description	Import Tariff	Total CY-1998 Imports (thousand USD) */	
			From U.S.	All origins **/
Mixed Food Imports				
2102.20.11	*Leveduras* in tablets	9.9%	15	38
2102.20.19	Leveduras (in other forms)	6.1%	32	121
2103.20.00	Ketchup & other tomato sauces	12.1%	19	1,628
2103.30.10	Mustard powder	1.3%	17	20
2103.30.90	Prepared Mustard	10.7%	1	537
2103.90.90.81	Various sauces, including mayonnaise	9.1%	452	10,043
2105.00.99	Ice creams (More than 7% fat content)	lowest of 9.3%+63.3 Eur/100 net weight or 20.9%+8.1 Eur/100 Kg net weight	127	3,146
2106.10.20	Mixed Food Prep.	15.2%	216	1,714
2106.90.92	Mixed Food Prep.	15.2%	1,214	24,622
2106.90.98	Mixed Food Prep.	10.3%+EA	259	31,020
Other				
Total Mixed Food Imports (Chapter 21 of the HTSC) ***/			2,263	116,668

*/ Source: National Statistics Institute INE; **/ Includes U.S. products transhipped through other EU countries; ***/ Includes products sold to end-consumers. EA/ Agricultural element; different for first and second semesters of 1999; calculated on the basis of product composition.

Selected Product Listing (Cont.)

HTSCN	Product Description	Import Tariff	Total CY-1998 Imports (thousand USD) */	
			From U.S.	All Origins **/
Beverages				
2202.90.10	Water	11.4%	51	15,872
2203.00.09	Beer (More than 10 liter containers)	12%	3	2,461
2204.21.79	White Wine with less than 13% alc., in containers with less than 2 liters	14.2 Euros/hl	8	2,135
2204.21.80	Red wine with less than 13% alc., in containers with less than 2 liters	14.2 Euros/hl	18	859
2204.21.83	White wine, with more than 13% alcohol	16.6 Euros/hl	6	24
2204.21.84	Red wine with more than 13% alcohol	16.7 Euros/hl	16	76
2208.30.11	Bourbon, in containers with less than 2 liters	0.05 Euros/%vol/hl+0.8 Euros/hl	1,153	1,299
Other				
Total beverage imports (Chapter 22 of the HTSC) ***/			1,260	266,739

*/ Source: National Statistics Institute INE; **/ Includes U.S. products transhipped through other EU countries; ***/ Includes products sold to end-consumers.

Import Requirements

Portugal is a full member of the EU, and as such, it applies the EU import tariff schedule and related trade regulatory legislation. For duties in effect on imports of identified commodities, please check above tables.

Labeling Requirements

Labeling requirements are also set at the EU level and are transcribed into national legislation with slight modifications. Most importantly, the EU GMO-labeling legislation currently in preparation, will also be effective in Portugal. For more on product labeling, please see PO8019.

Key Contact Lists

U.S. Government & Cooperators List

Organization	Address	Telephone	Fax Number
American Embassy, Lisbon			
U.S. Embassy - Office of Agricultural Affairs	Av. das Forças Armadas 1507 LISBOA PORTUGAL	351-1-770 2360	351-1-726 9721
US Cooperators			
Alaska Seafood Marketing Institute (ASMI)	Avda. Montseny, 32 - La Floresta-08190 Barcelona - ESPAÑA	34-93-589 8547	34-93-589 7051
American Seafood Institute	212 Main Street - Suite 3 - Wakefield, Rhode Island 02879 - USA	1-401-364 6185	1-401-789 9727
East Coast Seafood España, S.L.	Parque Empresarial “San Fernando”- Edificio Francia - Planta Baja - 28831 Madrid - ESPAÑA	34-91-656 0596	34-91-656 1586
California Walnut Commission	1540 River Park drive - Suite 203 - Sacramento, CA 95815 - USA	1-916-646 3807	1-916-923 2548
Western U.S. Seafood	121 S.W. Salmon, Suite 240 - Portland, Oregon 97204, USA	1-503 229 6734	1-503-229 6113
California Pistachio Commission (European Office)	87 Cambridge Road - Fulbourn - Cambridgeshire - England - CB1 5HH	44-1223-882 250	44-1223-882 260
National Dry Bean Council	Avda. Montseney, 32 - La Floresta - 08190 - ESPAÑA	34-93-589 8547	34-93-589 7051
USA Dry Pea and Lentil Council	Avda. Montseney, 32 - La Floresta - 08190 Barcelona, ESPAÑA	334-3-589 8547	34-3-589 7051
USA Rice Federation	Alsterufer 28 - 20354 Hamburg DEUTSCHLAND	49-40-4503 8660	
Wine Institute of California	Prins Bernhardlaan 10 - Postbus 208 - 2400 AE Alphen a/d Rijn - Netherlands	31-172-471 571	31-172 475 45
National Peanut Council of America	Grosvernor Gardens House 35-37 Grosvenor House SW 1WOBS - U.K.	44-1-71-828 0838	44-1-71-828 0839

Eastern U.S. Agricultural Food Export Council EUSAFEC	1036 Public Ledger Building - 150 South Independence Mall West - Philadelphia, PA 19106-3410 - USA	1-215-829 9111	1-215-829 9777

GOP Organizations

Organization	Address	Telephone	Fax Number
Direcção-Geral das Alfândegas	R. da Alfândega, nº 5 - 1100 LISBOA	351-1-886 8185	351-1-888 4208
Direcção-Geral da Fiscalização e Controlo da Qualidade Alimentar	Av. Conde Valbom, nº 98 - 1050 LISBOA	351-1-798 3600	351-1-798 3834
Instituto do Vinho e da Vinha - IVV	R. Mouzinho da Silveira, nº 5 - 1200 LISBOA	351-1-356-3321	351-1-536 002

Portuguese Trade Associations

Organization	**Address**	**Telephone**	**Fax Number**
Chilled/Frozen Seafood Importers			
ACOP - Associação de Comerciantes de Pescado	Av. Visconde de Valmor, 36 - 1º esq.	351-1-797 4096	351-1-795 1695
Fruit & Vegetables Trade Associations			
ANAIEF	R. Diogo Couto, 27 - 1º - 1000 LISBOA	351-1-814 0521	351-1-815 4511
Beverages			
ACIBEV - Associação dos Comerciantes e Industriais de Bebidas e Vinhos	Largo do Carmo, nº 15 - 1º - 1200 LISBOA	351-1-346 2318	351-1-342 7517
ANCEVE - Associação do Norte dos Comerciantes, Industriais Produtores, Engarrafadores, Vinificadores e Exportadores de Vinhos e Bebidas Espirituosas	Urbanização Raione - R. do Salgueiral, nº 86 - 2º, Sala 8 - 4200 PORTO	351-2 509 3631	351-2-594 760

Distributor Associations

Organization	Address	Telephone	Fax Number
APED (Super-Market Association)	Campo Grande, nº 286 - 5º - 1700 LISBOA	351-1-751 0920	351-1-757 1952
ADIPA (Wholesalers Association)	R. Rodrigues Sampaio, nº 31 - 1º D - 1150 LISBOA	351-1-357 5296	351-1-352 4139
ANACPA - Food Products Marketing Asociation	Av. Elias Garcia, 59 - 4º - 1000 LISBOA	351-1-799 6410	351-1-796 2470
ANCIPA - Food Products Producing & Marketing Association	Lg. S. Sebastião da Pedreira, 31-3º - 1050 LISBOA	351-1-352 8803	351-1-315 4665

Other Organizations

Organization	Address	Telephone	Fax Number
ARESP - Associação da Restauração e Similares de Portugal	Av. Duque de Ávila, nº 75 - 1000 LISBOA	351-1-352 7060	351-1-354 9428
UNISOR - União das Associações de Hotéis e Restaurantes do Norte de Portugal	R. Fernandes Tomás, 235 - 4215 PORTO	351-2-589 9530	351-2-510 3588
AIHSA - Associação dos Industriais de Hotelaria e Similares do Algarve	R. Dr. João Lúcio, nº 4 - 8000 FARO	351-89-825619	351-89-801823
Assoc. Dos Industriais de Hotelaria, Restaurantes e Similares do Centro	Av. Emídio Navarro, nº 11 - 4º A - 3000 COIMBRA	351-39-820150	351-39-834858
Associação Portuguesa de Franchising	R. Viriato, nº 25 - 3º - 1050-234 LISBOA	351-1-319 2938	351-1-319 2939
Associação de Cozinheiros e Pasteleiros de Portugal	R. José D. Coelho, 40-3º - 1300 LISBOA	351-1-362 5815	-

Leading 10 Retailers Ranked by Sales Value

Company	1997 Total Sales (Million USD)	Address	Telephone	Fax Number
Modelo Continente (SONAE Group)	1,739	R. João Mendonça, 529-7º - 4464-5050 MATOSINHOS	351-2-956 1899	351-2-956 1842
Jumbo/Pão de Açúcar (Auchan Group)	967	Tv. Do Teixeira Jr., nº 1 - 1300 LISBOA	351-1-360 2100	351-1-362 6150
Pingo Doce	701	R. Actor António Silva, 16-7º-1600 LISBOA	351-1-753 2000	351-1-757 6661
Intermarché	514	ITME - Norte Sul Portugal SA - Lugar Marujo - Bugalhos - 2380 ALCANENA	351-49-880 300	351-49-880 475
Feira Nova	476	R. Actor António Silva, 16 - 7º 1600 LISBOA	351-1-753 2000	351-1-757 6661
Carrefour	309	Av. Das Nações Unidas - Telheiras - 1600 LISBOA	351-1-711 4400	351-1-716 6662
Pluricoop	36	Av. António Sérgio - 2900 SETÚBAL	351-65-761477	351-65-711 832
Supermercados Ulmar	24	Courelas - Edif. AZÓIA, 6 - 1º Esq. - Pousos - 2400 LEIRIA	351-44-840 496	351-44-841 036
Supercompra	21	Estrada Paço do Lumiar, nº 21 - 1600 LISBOA	351-1-716 3119	351-1-716 2620
CoopBancários	9	R. D. Filipa de Vilhena, nº 6 - E/F - 1000 LISBOA	351-1-311 6900	351-1-311 6999

Source: DISTRIBUIÇÃO HOJE, NOVEMBER 1998 ISSUE

Leading 16 Retailers Ranked by Sales Value

Company	1997 Total Sales (Million USD)	Address	Telephone	Fax Number
MAKRO	712	Estrada da Circunvalaºão - 1495 Algés	351-1-417 0253	351-1-417 4910
RECHEIO	475	Edif. Castilho - R. Castilho, nº 5-1250 LISBOA	351-1-318 6600	351-1-318 6699
GRULA	233	Estrada Paço do Lumiar, 21 - 1600 LISBOA	351-1-716 3318	351-1-716 4611
Manuel Nunes e Fernandes	76	R. Major João Luís de Moura - Odivelas - 2675 ODIVELAS	351-1-478 8460	351-1-478 8499
COOPERTORRES	74	Fonte Santa - 2560 TORRES VEDRAS	351-61-319 100	351-61-31 5638
TORRENTAL	64	Variante do Bom Amor-2350 TORRES VEDRAS	351-43-993 815	351-43-993 546
ALICOOP	60	Paço Deão - Apartado 108-8301 SILVES	351-82-442 584	351-82-443 578
ARMAZÉNS DA MATINHA	51	Urb. Da Matinha - R. 3-Edif. Alto do Tejo, 4º-1900 LISBOA	351-1-868 5821	351-1-868 6197
A LUTA	42	R. das Fisgas - Alcoitão - Apartado 69-2766 ESTORIL	351-1-469 2560	351-1-469 2585
SOGENAVE	41	R. da Garagem, 10 - 2799-502 CARNAXIDE	351-1-416 6140	351-1-418 8120
RAMAZOTTI	36	Av. do Forte - Edifício RAMAZOTTI - 2795	351-1-425 8200	351-1-418 6000
CARPAN	26	R. Terramente, 722 -4470 Gueifães - Maia	351-2-901 5713	351-2-901 0158
COOPLISBOA	23	Monte Novo - 2955 PINHÃO NOVO	351-1-238 4289	351-1-238 8048
COOPERCALDAS	17	R. do Moinho Saloio - 2510 ÓBIDOS	351-62-830 140	351-62-830 141
SINDE E MONTEIRO	15	Alameda Basílio Teles, 60 - 4100 PORTO	351-2-600 3670	351-2-609 3469
SIMÕES E SOUSA	13	R. Principal de João das Areias - 2686-959 SACAVÉM	351-1-941 0127	351-1-941 3304

Source: DISTRIBUIÇÃO HOJE, NOVEMBER 1998 ISSUE

Portugal: Contacts of Leading Restaurant Chains

Organization	Address	Telephone	Fax Number
McDonald’s	Sistemas McDonalds Portugal, Lda- R. José J. Almeida, 2 - 3º B - Sto Amaro de Oeiras - 2780-337 OEIRAS	351-1-440 5300	351-1-4405301
Ibersol	Edifício Peninsula - Praça do Bom Sucesso, 105-159, 9º - 4150-146 PORTO.	351-2-608 9700	351-2- 608 9757
Telepizza	Centro Comercial Carrefour - Av. Das Nações Unidas, Piso 2 - Telheiras - 1600-528 LISBOA.	351-1-716 5750	351-1-716 6314
Joshua’s Swarma	R. S. Francisco 471 - Armazém 1-A - Adroana - 2765 ESTORIL	351-1-460 0934	351-1-460 0935

Leading Chilled/Frozen Fish importers

Organization	Address	Telephone	Fax Number
GRUPO GEL	R. Heróis de França, 659 - 1º D 4450 MATOSINHOS	351-2-939 83 40	351-2-939 8349
NOVA SEC	Docapesca de Pedrouços, 93 B - Sala 8 - 1400 LISBOA	351-1-301 7858	351-1-301 7860
GELPEIXE, LDA.	Apartado 42 2670 LOURES	351-1-984 8400	351-1-984 8401

Source: Fish Importers Association ACOP.