USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.08

Required Report - public distribution

Date: 9/30/2005

GAIN Report Number: SP5032

Iberian Peninsula

Exporter Guide

Spain

2005

Approved by:
Stephen Hammond
U.S. Embassy

Prepared by:
Maria do Monte Gomes
Laura Jerez

Report Highlights:
Modernization and growth of the Iberian Peninsula food processing sector, and increasing demand resulting from an expanded European Union (EU) population may mean increasing export opportunities for U.S. food-ingredient exporters (MG31LJ20SH3).

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

INDEX

SECTION I. IBERIAN PENINSULA MARKET OVERVIEW

SPAIN ECONOMIC TRENDS

	2001	2002	2003	2004	2005^	2006*
ECONOMIC TRENDS						
Inflation (%)	2.7	4.1	2.6	3.2	3.1	3.2
Unemployment (%)	13.1	12.4	11.7	11.0	10.4	9.8
GDP at Market Prices (%)	2.6	2.1	2.4	3.1	3.0	3.2
GDP per Capita (EUROS)	16,147	16,586	17,442	19,388	20,150	21,395
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
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	88	93
RETAIL SECTOR (2)						
No. of Retail Stores	62,047	59,076	56,913	54,255	51,962	49,726
Total Retail Sales (€ Million)	44,740	48,510	50,700	54,230	57,729	61,429
Retail Sales Share by Type of Store (%)						
Hypermarkets	18.3	17.5	17.6	17.4	17	16
Supermarkets	42.2	42.3	42.4	43.8	45	46
Traditional Stores	31.3	30.8	30.1	29.8	28	27
Others	8.2	9.4	9.9	9.0	10	10

(^) (*) FAS/Iberia Forecasts
(1) GTA
(2) Sector Magazines

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
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

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

	2001	2002	2003	2004	2005^	2006*
ECONOMIC TRENDS						
Inflation (%)	4.4	3.6	3.3	2.4	2.2	2.2
Unemployment (%)	4.1	5.1	6.4	6.7	7.2	7.6
GDP at Market Prices (%)	1.8	0.5	-1.2	0.8	0.5	0.5
GDP per Capita (USD$)	17,886	18,434	18,311	18,641	18,862	19,084
AGRICULTURAL PRODUCTS IMPORTS ($ 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
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	37	38
RETAIL SECTOR (2)						
No. of Retail Stores	27,163	25,995	25,454	24,918	23,456	23,130
Total Retail Sales (€ Million)	9,255	9,841	10,281	10,674	11,250	11,793
Retail Sales Share by Type of Store (%)						
Hypermarkets	35.4	34.7	34.3	32.6	32	31
Supermarkets	46.8	48.6	49.5	51.5	53	55
Self-Service	6.5	6.6	7.1	7.3	7.6	8.0
Food Shops	0.9	0.8	0.7	0.6	0.5	0.5
Grocery Stores	10.4	9.3	8.4	8.0	7.2	6.6

(^) (*) FAS/Iberia Forecasts
(1) GTA
(2) Sector Magazines

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, Intermarc he, 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

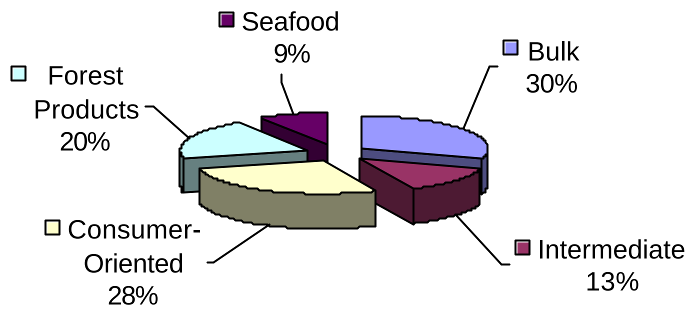
SPAIN

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

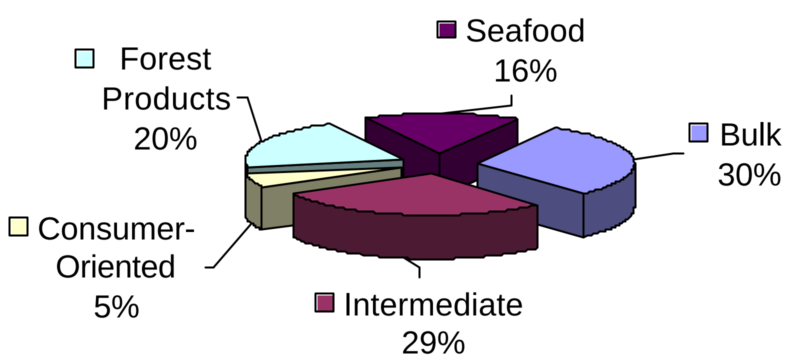
Advantages	Challenges
Portugal is a net importer of food and agricultural products.	Importers still have limited knowledge regarding the quality and supplies of U.S. food and agricultural products.
Domestic distribution systems are efficient.	High marketing costs (advertising, discounts, etc.) are necessary.
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.

U.S. Exports to Spain During 2004 For Spain's $25 Billion Market



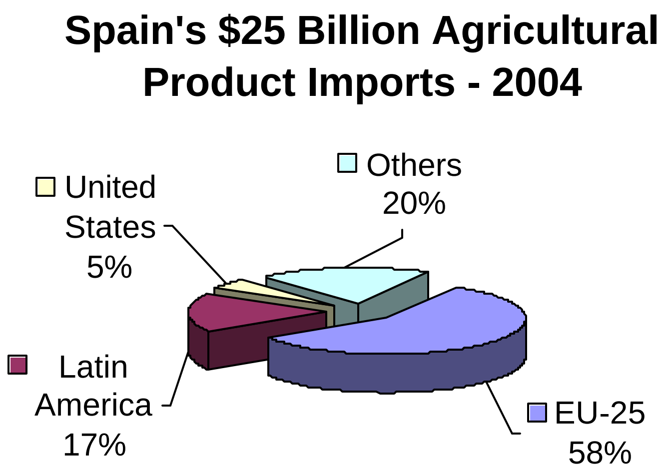
SOURCE: BICO

U.S. Exports to Portugal During 2004 For Portugal's $7.5 Billion Market

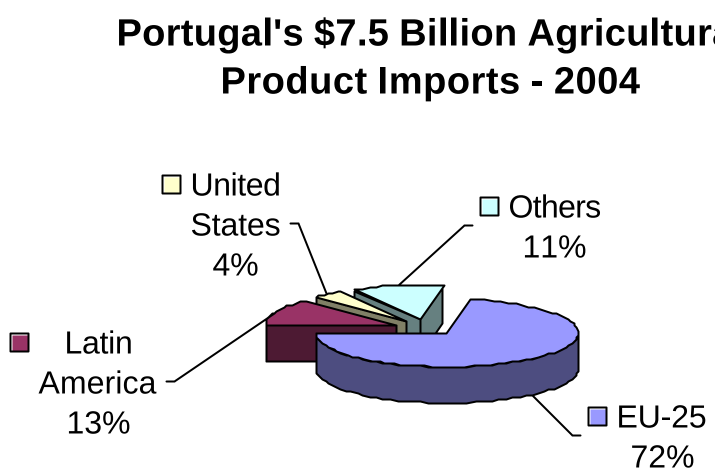


SOURCE: BICO

Competition for Iberian Peninsula Market for Imported Agricultural Products



SOURCE: Global Trade Atlas



SOURCE: Global Trade Atlas

SECTION II. EXPORTER BUSINESS TIPS

1. 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.

2. 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.

3. Food Standard 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, PO5014 at http://www.fas.usda.gov/gainfiles/200507/146130240.doc and SP5020 at http://www.fas.usda.gov/gainfiles/200507/146130239.doc, dated July 2005.

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), E34054 at http://www.fas.usda.gov/scripts/gd.asp?ID=146107373.

4. 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 PO5014 at http://www.fas.usda.gov/gainfiles/200507/146130240.doc and SP5020 at http://www.fas.usda.gov/gainfiles/200507/146130239.doc, dated July 2005 - FAIRS Report for Portugal and Spain, respectively. For detailed information on the EU-harmonized legislation, please consult the EU-25 FAIRS report, E34054 at http://www.fas.usda.gov/scripts/gd.asp?ID=146107373. 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.

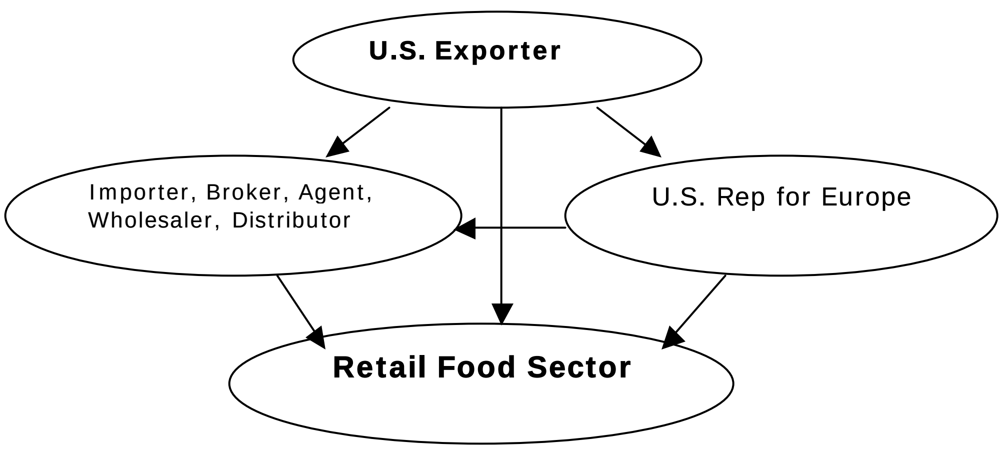
SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

1. Food Retail Sector

The Iberian Peninsula retail food market is very competitive and domestic distribution systems are efficient. Hypermarkets, supermarkets, convenience stores, hard-discount stores and specialized stores still coexist with the traditional grocery stores and wet markets, even though the total number of retail outlets has decreased significantly in the last decade.

- In Spain and Portugal most food purchases are made in hyper- and super-markets with traditional stores accounting for much less than half the fresh produce sales.
- 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.
- Retailers are expanding their scope and range of products to provide to consumers, including ready-to-eat and/or ready-to-cook foods, take away meals and home delivery in order to favor convenience.

Market structure:



For more information on the Iberian Peninsula Retail Food Sector, please consult the retail sector reports for:

Portugal - http://www.fas.usda.gov/gainfiles/200412/146118313.doc

Spain - http://www.fas.usda.gov/gainfiles/200309/145986184.doc

2. HRI Sector

The Iberian Peninsula Hotel, Restaurant and Institutional (HRI) food sector expanded significantly during the 80's and 90's due to profound social and economic changes. The importance of the sector and the continued specialization and growing level of management expertise among HRI players makes this sector an important area for U.S. food exporters.

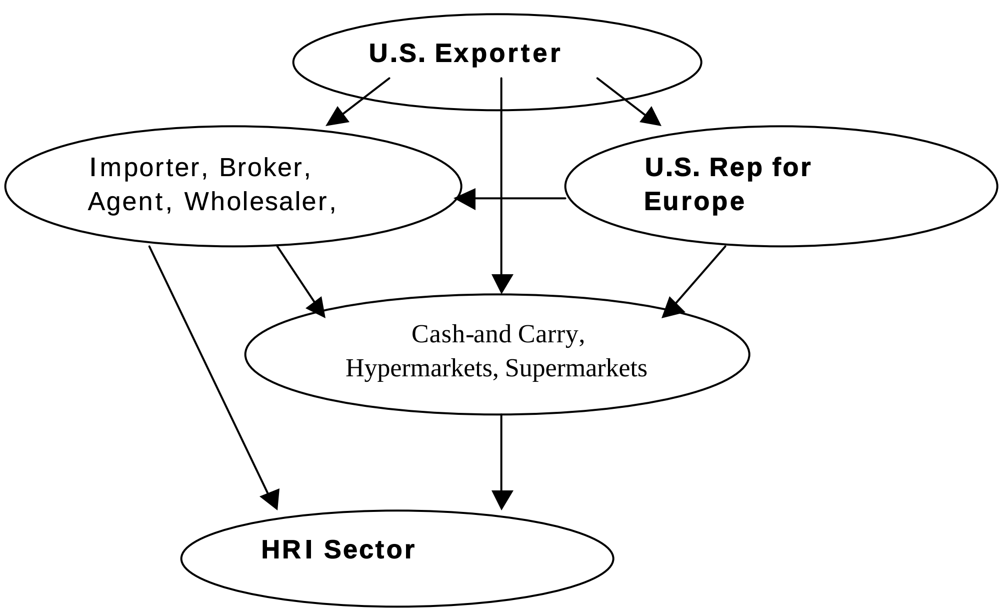
The Iberian Peninsula HRI sector is very complex and diverse.

- The Iberian Peninsula is one of the top tourism destination 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 half of all food consumed.
- Restaurant chains, including ethnic and fast food, are gaining a large share of the market and are expected to continue growing.
- Consumption of ready-to-eat/take away food has grown significantly to meet the increased value consumers place on both convenience and time. Most hyper and supermarket chains offer ready-to-eat/take away food.
- There is also an increasing number of food outlets specializing in take away food, ranging from barbecued poultry or other kinds of meat to more traditional meals, including soup, seafood, side dishes, etc.

The large quantities of food sold through the HRI channels make it an important sector as food distribution is concerned. However, U.S. suppliers face some real challenges:

- Competition from neighboring EU countries is fierce.
- Higher prices for U.S. food products relative to local market and/or neighboring EU countries.

Market Structure:



For more information on the Iberian Peninsula HRI Sector, please consult the HRI sector reports for:

Portugal - http://www.fas.usda.gov/gainfiles/200407/146106851.doc

Spain - http://www.fas.usda.gov/gainfiles/200412/146118192.doc

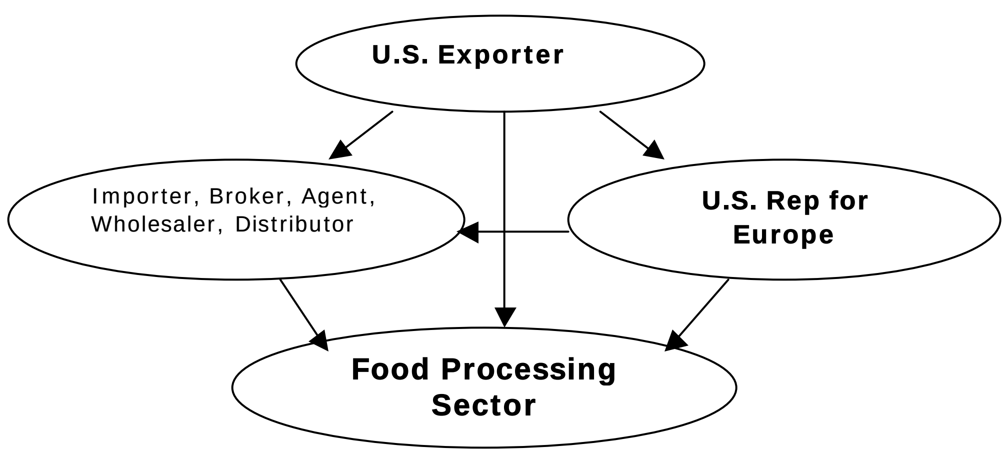
3. Food Processing Sector

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. Portugal and Spain 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 is very diversified.

- Spanish food processing industry generates 17 percent of Span's total industrial production, consumes around 70 percent of all domestic agricultural production and provides almost half a million jobs.
- The Portuguese food processing industry accounts for about ten percent of the national gross domestic product, which makes this sector very important to the Portuguese economy.
- Today, the Iberian Peninsula food processing industry is driven by the most modern requirements with special attention to the quality and safety of the food products.

Market structure:



For more information on the Iberian Peninsula food processing sector, please consult the food processing sector report for:

Spain - http://www.fas.usda.gov/gainfiles/200410/146117871.doc

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
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. 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

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
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

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/ - **2004**	**$24,870/5%**
Consumer Food Imports From All Countries($Mil)/U.S. Market Share (%) 1/ **2004**	**$22,041/ 4.8%**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 1/ - **2004**	**$4,790/2%**
Total Population (Millions) / Annual Growth Rate (%) - **2004**	**43.2/1.5%**
Urban Population (Millions) / Annual Growth Rate (%) - **2004**	**14.4/0.37%**
Number of Major Metropolitan Areas	**4**
Per Capita Gross Domestic Product (Euros) - **2004**	**€19,388**
Unemployment Rate (%) - **2004**	**11%**
Per Capita Food Expenditures (Euros) - **2004**	**$1,291**
Percent of Female Population Employed - **2004**	**38.4%**
Exchange Rate (US$1 = 1 Euro) - **2004**	**€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/ - **2004**	**$7,467/4%**
Consumer Food Imports From All Countries($Mil)/U.S. Market Share (%) 1/ **2004**	**$6,558/ 3.55%**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 1/ - **2004**	**$1,183/3.5%**
Total Population (Millions) / Annual Growth Rate (%) - **2004**	**10.3/1%**
Urban Population (Millions) / Annual Growth Rate (%) - **2004**	**3.5/0.5%**
Number of Major Metropolitan Areas	**2**
Per Capita Gross Domestic Product (Euros) - **2004**	**€9,440**
Unemployment Rate (%) - **2004**	**6.7%**
Per Capita Food Expenditures (Euros) - **2004**	**$1,725**
Percent of Female Population Employed - **2004**	**65%**
Exchange Rate (US$1 = 1 Euro) - **2004**	**€0.80**

1/ Source: Global Trade Atlas

Spain's Food Imports

Spain Imports (In Millions of Dollars)	Imports from the World 2001	2002	2003	Imports from the U.S. 2001	2002	2003	U.S. Market Share % 2001	2002	2003
CONSUMER-READY AGRICULTURAL TOTAL	5,717	6,234	7,839	180	211	273	3	3	3
Snack Foods (Excl, Nuts)	333	390	490	1	1	1	0.37	0.08	0.13
Breakfast Cereals & Pancake Mix	60	71	106	1	1	1	0.52	0.04	0.05
Red Meats Fresh/Chilled/Frozen	417	528	683	1	0	0	0.01	0	0
Red Meats Prepared/Preserved	122	130	175	1	1	1	0.09	0.06	0.01
Poultry Meat	174	148	185	1	0	0	0	0	0
Dairy Products (Excl. Cheese)	775	729	918	1	1	1	0.02	0.02	0.03
Cheese	419	456	578	0	0	1	0	0	0.01
Eggs & Products	33	35	51	2	3	2	6	8	3
Fresh Fruit	543	555	803	1	1	1	0.19	0.14	0.08
Fresh Vegetables	229	249	347	2	2	1	0.7	0.84	0.42
Processed Fruit & Vegetables	573	613	686	6	5	6	1	0.84	0.92
Fruit & Vegetable Juices	106	134	171	4	3	1	4	2	0.85
Tree Nuts	247	279	371	125	148	200	51	53	54
Wine & Beer	218	221	283	1	1	1	0.39	0.29	0.18
Nursery Products & Cut Flowers	146	172	223	2	3	5	1	2	2
Pet Foods (Dog & Cat Food)	92	110	145	10	12	13	11	11	9
Other Consumer-Oriented Products	1,230	1,415	1,624	26	33	42	2	2	3
FISH & SEAFOOD PRODUCTS	3,870	3,990	4,956	72	63	79	2	2	2
Salmon	115	132	146	4	3	4	4	2	2
Surimi	52	55	74	7	7	12	14	13	16
Crustaceans	1,067	1,040	1,255	23	18	23	2	2	2
Groundfish & Flatfish	882	862	1098	9	11	11	1	1	1
Molluscs	728	766	1033	6	8	8	0.8	1	0.78
Other Fishery Products	1,026	1,135	1,350	23	14	22	2	1	2
AGRICULTURAL PRODUCTS TOTAL	11,085	12,530	14,248	842	903	965	8	7	7
AGRICULTURAL FISH & FORESTRY TOTAL	16,743	18,387	21,592	1,160	1,195	1,297	7	6	6

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			Imports from the U.S.			U.S. Market Share %		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
CONSUMER-READY AGRICULTURAL TOTAL	2,280	2,384	2,833	7	8	7	0.29	0.33	0.24
Snack Foods (Excl. Nuts)	166	189	236	1	1	1	0.22	0.20	0.13
Breakfast Cereals & Pancake Mix	44	49	66	1	1	1	0.01	0.04	0.11
Red Meats Fresh/Chilled/Frozen	385	402	511	0	0	0	0	0	0
Red Meats Prepared/Preserved	65	80	95	0	0	0	0	0	0
Poultry Meat	25	20	31	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	258	243	294	1	1	1	0.02	0.01	0.01
Cheese	67	75	91	1	1	1	0.01	0.10	0
Eggs & Products	13	13	17	1	0	1	3	0	0.83
Fresh Fruit	328	316	395	1	1	1	0.01	0.01	0
Fresh Vegetables	120	123	152	0	1	0	0	0	0
Processed Fruit & Vegetables	147	157	186	1	1	1	0.19	0.20	0.12
Fruit & Vegetable Juices	36	40	46	1	1	1	0.03	0.04	0.02
Tree Nuts	18	18	24	2	1	2	8	5	7
Wine & Beer	106	102	109	1	1	1	0.10	0.72	0.01
Nursery Products & Cut Flowers	49	60	73	1	1	1	0.13	0.27	0.12
Pet Foods (Dog & Cat Food)	66	67	85	1	1	1	1	2	1
Other Consumer-Oriented Products	387	431	425	3	4	3	0.76	0.93	0.76
FISH & SEAFOOD PRODUCTS	957	965	1,125	37	28	28	4	3	2
Salmon	16	16	16	1	1	1	3	3	4
Surimi	10	18	16	2	3	2	20	16	11
Crustaceans	118	124	137	1	1	1	0.30	0.26	0.20
Groundfish & Flatfish	467	436	486	33	24	25	7	5	5
Molluscs	80	83	116	1	1	1	0.83	0.19	0.16
Other Fishery Products	265	287	354	1	1	1	0.13	0.07	0.08
AGRICULTURAL PRODUCTS TOTAL	4,068	4,222	4,770	168	209	225	4	5	5
AGRICULTURAL, FISH & FORESTRY TOTAL	5,494	5,664	6,374	243	276	301	4	5	5

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

Spain's Top 15 Food Suppliers

CONSUMER-READY AGRICULTURAL IMPORTS			
($1,000)	2001	2002	2003
France	1,319,745	1,407,866	1,807,878
Germany	697,795	773,263	939,069
Netherlands	653,964	718,322	907,475
Italy	348,288	418,635	530,183
Ireland	320,614	356,728	507,244
Belgium	301,355	290,738	354,200
Portugal	244,234	282,752	309,483
Denmark	197,354	227,900	290,242
United Kingdom	220,420	236,194	278,828
United States	179,904	211,471	272,947
Brazil	136,020	121,931	164,817
Argentina	64,702	70,836	127,562
Chile	60,162	79,175	115,189
Peru	91,032	103,705	97,346
Thailand	83,459	65,685	94,388
Other	797,714	868,495	1,041,726
World	5,716,841	6,233,765	7,838,649

FISH & SEAFOOD PRODUCTS IMPORTS			
($1,000)	2001	2002	2003
Argentina	410,671	308,391	470,698
Morocco	303,727	351,372	423,417
France	287,702	315,999	398,071
United Kingdom	218,010	243,766	281,929
Namibia	212,441	174,251	243,270
Portugal	170,654	189,350	214,831
Italy	128,341	153,785	189,091
Denmark	122,528	135,943	166,076
Netherlands	165,455	181,050	153,116
South Africa	102,645	116,809	148,968
Iceland	96,799	106,463	139,496
Ecuador	65,268	61,258	128,083
Falkland Islands	59,958	66,836	121,890
Chile	113,338	117,039	118,905
Norway	61,026	68,554	98,693
Other	1,351,799	1,399,551	1,659,955
World	3,870,368	3,990,440	4,956,486

Source: United Nations Statistics Division

Portugal's Top 15 Food Suppliers

CONSUMER-READY AGRICULTURAL IMPORTS			
($1,000)	2001	2002	2003
Spain	1,112,842	1,139,607	1,339,222
France	340,349	322,468	374,372
Germany	186,181	209,501	253,038
Netherlands	155,031	179,765	234,877
Italy	57,379	79,272	93,593
Belgium	64,985	82,877	93,083
United Kingdom	53,431	58,339	66,731
Costa Rica	40,744	41,661	52,302
Brazil	30,964	31,546	46,484
Ireland	22,601	27,831	41,452
Denmark	31,591	34,550	39,293
Ecuador	25,366	22,497	27,054
Thailand	17,173	11,204	18,534
Colombia	22,757	15,362	17,931
Chile	10,720	13,326	17,022
Other	108,311	114,591	118,411
World	2,280,431	2,384,401	2,833,427

FISH & SEAFOOD PRODUCTS IMPORTS			
($1,000)	2001	2002	2003
Spain	332,363	354,296	478,720
Russian Federation	64,650	60,546	83,096
Denmark	42,792	66,329	62,462
Norway	106,462	88,529	57,028
Netherlands	30,113	37,715	51,312
Iceland	106,709	78,142	50,207
France	31,191	36,391	46,646
Sweden	11,503	20,944	33,195
United States	36,821	27,526	27,682
South Africa	18,348	17,657	23,921
Mozambique	20,610	20,183	21,299
Germany	20,323	21,831	20,087
United Kingdom	10,034	14,972	17,125
Mauritania	11,167	11,961	13,846
India	11,483	11,473	13,110
Other	102,646	96,726	125,003
World	957,216	965,220	1,124,733

Source: United Nations Statistics Division