USDA Foreign Agricultural Service

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Retail Foods

2017

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Report Highlights:
In Fiscal Year (FY) 2017, Spain imported $1.7 billion worth of agricultural, fish and forest products from the United States. As Spain maintains its economic recovery in 2017, the retail sector continues to consolidate its position and importance in the country. The Spanish economy is expected to continue to grow at a moderate pace, continuing the post-crisis expansion, the recovery of consumers' confidence and the increasing spending, though the years of economic recession still have an influence in consumers' behavior. The sector will need to adjust once again to this new reality, where new opportunities will likely arise for U.S. exporters.

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SECTION I. MARKET SUMMARY

Economic Trends

The Spanish economy is expected to continue to expand at a slightly slower pace in 2017. The progress in alleviating the unemployment situation, the growth in exports and the improvement in private consumption is leading the way out of the recession. The country seems to be on the right path out of the economic crisis that severely affected its financial system and consumer income and behavior. This will likely have a positive effect in the retailing industry as a whole. Online retailing continue to increase and is expected to continue to be prosperous in the medium term, as more store-based companies move to online commerce.

ECONOMIC TRENDS	2013	2014	2015	2016	2017*
Real GDP Growth Rate	-1.7	1.4	3.2	3.3	2.9
Inflation (%)	1.5	-0.2	-0.6	-0.3	2.0
Unemployment (%)	26.1	24.5	22.1	19.6	17.1
GDP per Capita (USD)	**29,200**	**29,600**	**25,600**	**26,500**	**26,600**

Source: Eurostat and World Bank
(*) Forecast

In 2017, the Spanish economy continued to grow, with increased public spending and domestic consumption being key factors. Additionally, the rise in exports and investment, as well as increased tourist numbers, had a positive impact in the economy and the unemployment number. With this progress, the country was able to reach the Gross Domestic Product (GDP) levels recorded immediately prior to the beginning of the economic recession.

This positive economic situation contributed to improving the confidence of the population, who are slowly moving away from the habits acquired in the years of economic uncertainty. When it comes to purchasing food, consumers are increasing looking at factors other than price when making purchasing decisions. Such factors include origin of products, quality, nutritional characteristics, innovation and convenience. Producers have quickly adapted to the new reality and changing post-recession habits. As a result increasing availability of innovative products and new ingredients, promoted through major advertising campaigns. The return of consumers to bars and restaurants and the strong growth of home delivery are other factors that are demonstrating that consumers are slowly loosening their belt when it comes to spending on food.

Despite the improvements, some analysts express their concerns on the sustainability of the Spanish recovery. Tourism is benefitting from instability in other Mediterranean countries and the level of individual, corporate and even bank debt could drag economy recovery. Furthermore, although it has decreased, the unemployment rate is still painfully high and there is a high number of educated and qualified workers emigrating abroad looking for job opportunities. These are some of the structural issues that need to be tackled if Spain intends to sustain economic growth over the medium term.

The Spain retail food market is highly diversified. Hypermarkets/supermarkets, convenience stores, major discount stores and specialized stores coexist with traditional corner grocery stores and open-air markets. However, over the past decade, the total number of retail outlets has decreased and the consolidation of the retail food industry continues.

Consumer Confidence

Despite the progressive economic recovery, Spanish consumers, after years of living on constricted budgets, are still giving considerable importance to low prices when shopping and continue to look for discount prices. The average consumer still looks for the best value-for-money products. However, the economic recovery has increased some consumers' disposable income and this is pushing them to cautiously return to buying more branded products.

The positive macroeconomic numbers shown by the Spanish economy is increasing consumers' confidence on the future of the economy and labor market. According to the Consumer Confidence Index (CCI) published in October 2017 by the Centre for Sociological Research (CIS), consumer confidence shows an important increase compared to October last year.

The CCI is a monthly assessment of recent economic developments and expectations of Spanish consumers related to family finances and employment used to anticipate their consumption decisions. The economic expectations, the rate of unemployment, available family incomes and inflation are important factors affecting this index and affecting consumer spending. In October 2017, this index reached 99.6 points, slightly lower than previous month but 8.9 points higher than October 2016. This means that Spanish consumers have a positive expectation of the future of the economic situation and thus, of their financial status.

Tourism

Spain continues to break tourism records with the number of visitors in the country. The Spanish National Statistics Institute indicated that 57.3 million tourists arrived in Spain from January through August 2017, up 10 percent compared to the same period of 2016. In the month of July alone, Spain received 10.5 million tourists, a record of visitors in a single month. As tourism accounts for 16 percent of the Spanish economy, these record numbers in 2016 and 2017 were one of the key drivers supporting the recovery of consumer foodservice.

Recent factors that may affect tourism negatively in the short and medium term are the still unknown consequences of the departure of the United Kingdom from the European Union (Brexit) and the appreciation of the Euro, making the country more expensive.

Retail Trends
The recovery of the economy is slowly leading to an increase in domestic demand. After years of tight budgets and cutting expenses, consumers are gradually spending more and are expected to continue to do so in the short term. Despite this fact, the years of economic recession still have an influence in consumers' behavior and the relevance of the value for money equation remains high.

Table 1. Sales in Grocery Retailers by Channel – Value

	2013	**2014**	**2015**	**2016**
Modern Grocery Retailers	*83,758*	*82,613*	*83,260*	*85,457*
- Convenience Stores	1,484	1,392	1,305	1,057
- Discounters	8,331	8,660	8,976	9,131
- Forecourt Retailers	1,342	1,280	1,243	1,237
-- Chained Forecourt Retailers	1,299	1,241	1,206	1,201
-- Independent Forecourt Retailers	42	39	37	36
- Hypermarkets	17,236	15,293	14,435	14,336
- Supermarkets	55,365	55,987	57,300	59,695
Traditional Grocery Retailers	*28,561*	*27,420*	*26,486*	*25,895*
- Food/Drink/Tobacco Specialists	23,681	22,759	21,963	21,480
- Independent Small Grocers	2,340	2,212	2,101	2,029
- Other Grocery Retailers	2,540	2,448	2,423	2,386
Total Grocery Retailers	**112,319**	**110,032**	**109,746**	**111,352**

Source: Euromonitor
Unit: Million USD

According to Euromonitor, the improvement of the economy continues to support the slight shift back to branded products. Although the importance of private label is unquestionable, in some categories the average unit price of private label products and their branded counterparts is so close that consumers are switching back to branded products. Another notable recent change is the increased frequency of store visits and purchases, as well as the growing interest in proximity stores, as consumers often prefer to purchase fresh produce on a more regular basis, ideally from stores in close proximity to their homes and workplaces.

Grocery retail is the most important retail channel in Spain, representing 52% of total store-based retailing value sales. Internet sales still represent a small proportion of grocery sales in the country, although significant growth is expected in this area.

Mercadona remains the most important grocery retailer, followed by Carrefour and Dia, as shown in the table below:

Table 2. Grocery Retailers Company Shares (% Value)

	2013	2014	2015	2016
Mercadona SA	18.9	19.5	19.7	19.9
Carrefour SA	7.4	7	7.6	7.6
Distribuidora Internacional de Alimentación (Dia) SA	4.7	4.9	5.9	6.2
Auchan Group SA	5.2	4.9	4.8	4.9
Eroski, Grupo	5.2	5.1	5.1	4.8
Schwarz Beteiligungs GmbH	2.6	2.7	2.9	3.2
El Corte Inglés SA	2.8	2.6	2.4	2.3
Consum, Sociedad Cooperativa Ltda	1.8	1.9	2	2.1
Internationale Spar Centrale BV	1.3	1.4	1.4	1.3
Bon Preu SA (Grupo)	0.8	0.9	0.9	1
Dinosol Supermercados SL (Grupo)	0.7	0.8	0.9	0.9
Condis Supermercats SA	0.9	0.9	0.9	0.8
Covirán SCA	0.6	0.6	0.7	0.7
Aldi Group	0.6	0.6	0.6	0.6
Repsol YPF Distribuidora SA	0.7	0.6	0.6	0.6
Franmax UAB	-	-	0.5	0.5
E Leclerc	0.5	0.4	0.4	0.4
Nestlé SA	0.2	0.2	0.2	0.2
Congelats Reunits SAU	0.2	0.2	0.2	0.2
Cepsa Estaciones de Servicio SA	0.2	0.1	0.1	0.1
Grupo el Arbol Distribución & Supermercados SA	0.9	0.9	-	-
Maxima Grupe UAB	0.6	0.5	-	-
Others	43.4	43.1	42.4	41.8
Total	100	100	100	100
Mercadona SA	18.9	19.5	19.7	19.9

Source: Euromonitor

Internet Retailing

According to the Spanish National Institute of Statistics (INE), in their press note published in October 2017, 84.6 percent of the population between 16 and 74 years old have used internet in the last three months; 69 percent do it on a daily basis. Four out of ten people have bought something through internet; up five percent compared to 2016. In 2017, 83.4 percent of Spanish homes have internet access, compared to 81.9 percent in the previous year. Thus, the growth in internet availability at home supported the strong performance of internet retailing which grew by 8 percent in 2016, after growing 11 percent in 2015.

According to Euromonitor, food and drink products are the most popular product type sold via internet retailing in Spain. More families, particularly in the big urban areas, are saving time buying their groceries online. Still, the importance of internet retailing within grocery retailing has plenty of room to grow.

The competitive environment in internet retailing remains extremely fragmented, although the leading retail channel in 2016 remained Amazon with a 6 percent value share of the market.

One key trend in the retail sector is online sales. Internet retailing offers both convenience and economy as the prices of a very wide range of products can be compared against retailers from all over the globe. Online sales continued increasing in Spain and a good performance was recorded in internet retailing for another consecutive year, though it is interesting to note that in recent years, in a number of cases, internet retailing is perceived by consumers as complementary, not as a substitution.

Table 3. Internet Retailing for Food and Drink: Value

	2012	**2013**	**2014**	**2015**	**2016**
Food and Drink	1,287.93	1,356.24	1,464.76	1,595.33	1,667.08
Total Internet Retailing	**6,054.23**	**6,327.36**	**6,877.75**	**7,606.87**	**8,209.33**

Source: Euromonitor
Unit: Million USD

The main reason for growth in the food and drink sales online is the convenience offered by the channel and the fact that retailers are working on making delivery and collection easier and cheaper, not to mention a wider offer in the range of payment methods available to the consumer. The main obstacle to consistent, positive growth in food and drink online sales is the fact that many consumers worry about receiving lower quality products when ordering food and drink, especially fresh food, or products with a very close expiry date. Another factor influencing online sales is the consumers' concern about online fraud that occurred in the past. This suspicion drags the growth of internet sales. In this regard, Spain's leading internet retailers are focusing all of their efforts on building trust among their collective consumer base.

Overall, consumers still prefer the traditional, store-based retailing as personal contact with sales staff remains a very important part of the shopping process for many Spanish consumers. However, this becomes less important as the new generations born with internet enter the consumer world.

Product Trends

Spanish consumers are increasingly health conscious. Naturally healthy and free-from products are more widely available in supermarkets and specialized stores. One of the most interesting and promising categories are healthy products indicated for food intolerances. This boost in demand is partly due to the perception that consumers have of these products being healthier, even if they do not have diagnosed food intolerance.

According to Euromonitor, in 2016, free-from products sales grew 15 percent in value to reach

$1,035 million, with the lactose-free food category being the most dynamic, posting a rise in value of 31 percent. Euromonitor expects that the free-from category will continue to grow and is estimated to reach $1.8 billion in 2021.

Table 4. Sales of Free From by Category (% Growth)

	2012	2013	2014	2015	2016
Free From Allergens	15	15	15	15	15
Free From Dairy	373	401	395	420	436
Free From Gluten	98	112	130	146	161
Free from Lactose	136	190	237	317	417
Free from Meat	4	4	5	6	7
Free From Total	**625**	**722**	**781**	**904**	**1,035**

Source: Euromonitor
Unit: Million USD

Health and wellness products to continue contributing to a healthier lifestyle

Another interesting market niche is naturally healthy packaged food. In 2016, naturally healthy packaged food sales value grew 2 percent and it is expected to continue increasing in the medium term. According to Euromonitor, the increasing awareness of consumers about healthier lifestyles and habits is driving the demand for naturally healthy packaged food. Information technologies and social media are key factor to spreading healthier lifestyles and conscientious consumption.

Table 5. Sales of Natural Health (NH) Packaged Food by Category (Value)

	2014	2015	2016
NH Cereal Bars	23	24	24
NH Dairy	4	4	4
NH Fruit Snacks	48	50	53
NH Fruit and Nuts Bars	2	2	2
NH High Fiber Food	559	543	543
NH Honey	117	119	125
NH Olive Oil	1,757	1,772	1,802
NH Rice	16	18	19
NH Nuts, Seeds and Trail Mixes	969	1,010	1,043
NH Healthy Packaged Food	**3,494**	**3,540**	**3,614**

Source: Euromonitor
Unit: Million USD

Information for U.S. exporters

U.S. processed food exporters now face even greater challenges in the Spanish market, because of the EU labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled so that the consumer can distinguish the product. Due to the bad public perception of genetically modified products, retailers are reluctant to purchase these processed products or food ingredients for processing.

In addition, acceptable colorings and additives may differ from those used to produce product for the U.S. market. For more information on food additives regulation please check the FAS/USEU Mission link on the topic.

Spain generally applies EU rules and regulations. However, there are subtleties that exporters should learn about before exporting to the Spanish market. For more information, we invite potential U.S. exporters to contact the USDA FAS Office of Agricultural Affairs in Madrid at AgMadrid@fas.usda.gov for additional sector-specific information.

In general terms, U.S. exporters already exporting to other EU Member States will likely be meeting most of the requirements for exporting into the Spanish market. The U.S. exporter needs to make contact with an importer and/or distributor for his/her product. Typically, food products are imported directly by an importer, broker and/or wholesaler or distributor.

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

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

If the product is, or contains, plant or animal products, it will require a phytosanitary or health certificate issued by the competent U.S. authority. If animal products are exported to the EU, the plant has to be approved by the competent U.S. authority

- Import Certificate

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

For more information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standard Report for Spain and the EU-27 available at the FAS/USEU Mission link on the topic.

Also, please check the U.S. Mission to the European Union webpage, which will guide you on exporting into the EU.

Table 6. Advantages and Challenges for US Products in the Spanish Market

Advantages	Challenges
Tourism is a strong and ever-growing sector that provides sales in the HRI sector, as well as demand for more international foods.	Food imported from third countries, including the United States, must comply with EU food law, which varies considerably from U.S. regulation and practice.
Spain's food industry relies on imported ingredients, many from the United States.	Lack of consumer awareness of U.S. brands and varieties of U.S. products.
Good image and reputation of U.S. products.	Competition from neighboring EU countries, where tastes and traditional products may be well known.
Good network of agents and importers to help get product into the market.	U.S. exports face higher transportation costs and difficulties in shipping mixed or smaller container loads versus EU competitors.
Consumers are increasingly health conscious, demanding products not sufficiently present in the market.	EU labeling, traceability, and packaging laws.
Distribution structure is modern and many companies cover both Spain and Portugal.	High import tariffs and import regulations impose a price disadvantage on non-EU based companies.
Food products in the market are becoming more diversified. Consumers are becoming more open, creating opportunities for new and foreign products.	High marketing costs (advertising, discounts, etc.) are necessary.

SECTION II. ROAD MAP FOR MARKET ENTRY

A. SUPERSTORES, SUPERMARKETS, HYPER MARKETS OR SUPER CENTERS, CLUB AND WAREHOUSE OUTLETS

Table 7. Retail Outlets – Company Profiles

Retail Organizations and Outlet Types	Ownership (Local or Foreign)	Sales 2016* $ Million	Location	Type of Purchasing Agent
MERCADONA, S.A. Supermarket	Spanish	22,370	Nationwide	Importer, Direct
GRUPO CARREFOUR, S.A. Supermarkets, Hypermarkets	French	9,299	Nationwide	Importer, Direct
GRUPO EROSKI Supermarket	Spanish	5,771	Nationwide	Importer, Direct
DISTRIBUIDORA INTERNACIONAL DE ALIMENTACION, S.A. (DIA) Hard Discount	French	5,342	Nationwide	Importer, Direct
ALCAMPO, S.A. - GRUPO Hypermarkets	French	3,883	Nationwide	Importer, Direct
LIDL SUPERMERCADOS, S.A.U. Hard Discount	German	3,577	Nationwide	Importer, Direct
CONSUM, S. COOP. Supermarket	Spanish	2,334	Nationwide	Importer, Direct
HIPERCOR, S.A. Supermarket	Spanish	1,937	Nationwide	Importer, Direct
AHORRAMAS, S.A. - GRUPO Supermarket	Spanish	1,753	Madrid, Castilla La Mancha	Importer, Direct
MAKRO AUTOSERVICIO MAYORISTA, S.A. Wholesaler	German	1,410	Nationwide	Importer, Direct

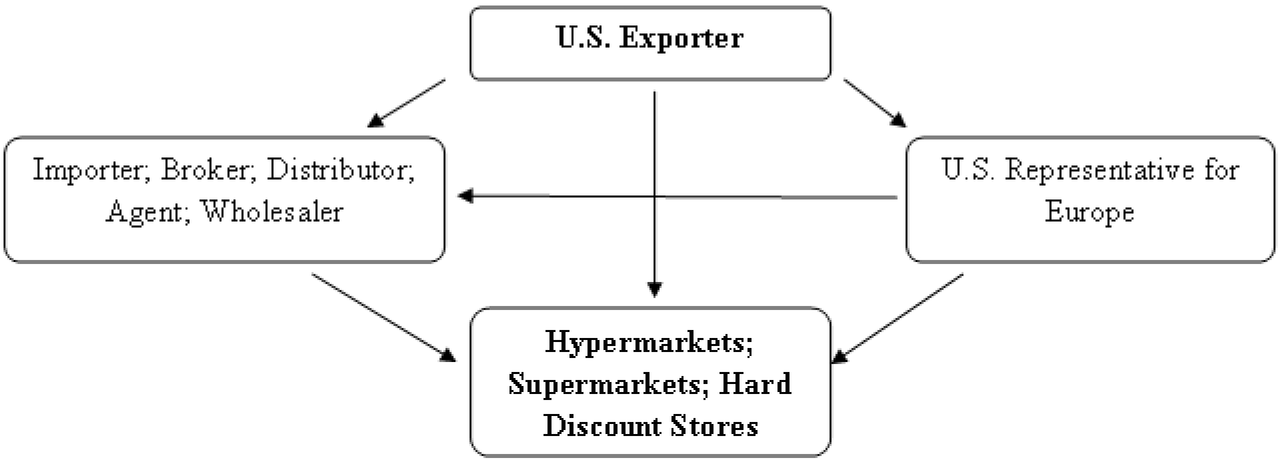
Source: Alimarket
* Estimate

Entry Strategy

Success in introducing products in the Spanish market normally requires local representation and personal contact. A local representative can provide up-to-date market intelligence, guidance on business practices and trade related laws, sales contact with existing and potential buyers, and market development expertise. The USDA FAS Office of Agricultural Affairs in Madrid maintains listings of potential importers and is currently developing sector-specific information to help you introduce your product in Spain.

A directory of European importers is available online at American Foods in Europe Directory. European importers of U.S. food and beverages are listed by product categories and company/country index.

Market Structure



In the supermarket sector, products are imported either by an importer, broker or agent, a wholesaler and/or distributor. Some products enter via other European Union ports, either through a European importer or through the U.S. representative for Europe for that specific product.

Product representatives are better positioned to promote to retailers and consumers since retailers, as a general rule, do not promote specific products within their facilities. However, retailers will sell shelf-space, which is very expensive in the Spanish market. In order to cut costs, some retailers are importing directly from the supplier. In the case of retailers whose ownership is primarily foreign (foreign partnership), such us Carrefour (French), Auchan (French) and Lidl (German), many of the products, in particular specialty products for sale, are from their respective home country. It is important to note that Spanish distributors have nationwide distribution in Spain and, in most cases, Portugal. The most important grocery retailer continues to be Mercadona, with 37 percent value share in 2016, according to Euromonitor.

While hypermarkets and larger sized supermarkets control a large share of sales, small sized supermarkets located in urban areas are becoming ever more popular due to their proximity to the consumer (generally located within walking distance of residential and/or business areas).

B. CONVENIENCE STORES, GAS MARTS, KIOSKS

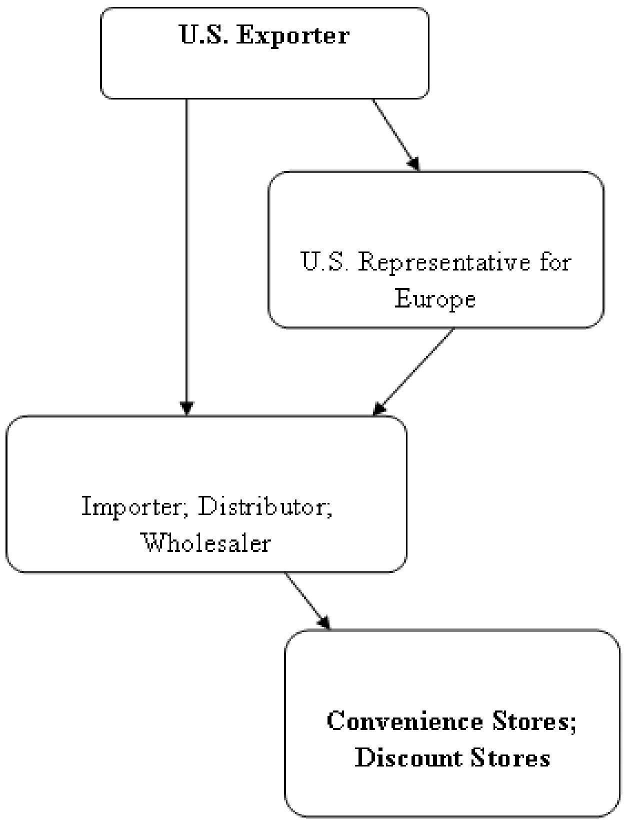
Table 8. Convenience Stores – Company Profiles

Retail Organizations and	Ownership	Sales	Location	Type of

Outlet Types	(Local or Foreign)	2016 $ Million*		Purchasing Agent
REPSOL-CAMPSA Gas station	Spanish	235	Nationwide	Importer, Wholesaler
DISA PENINSULA, S.L.U. Gas station	Spanish	117	Nationwide	Importer, Wholesaler
CEPSA CONVENIENCIA, S.A. Gas station	Spanish	106	Nationwide	Importer, Wholesaler
GALP ENERGIA ESPANA, S.A. Gas station	Portuguese	100	Nationwide	Importer, Wholesaler
AREAS, S.A. Highways	Spanish	57	Nationwide	Importer, Wholesaler
GESPEVESA Gas station	Spanish	57	Nationwide	Importer, Wholesaler
BP OIL ESPANA, S.A. Gas station	UK	35	Nationwide	Importer, Wholesaler
GRUPO VIPS – SIGLA, S.A. Urban Convenience Store	Spanish	33	Nationwide	Importer, Wholesaler

Source: Alimarket
* Estimate

Market Structure



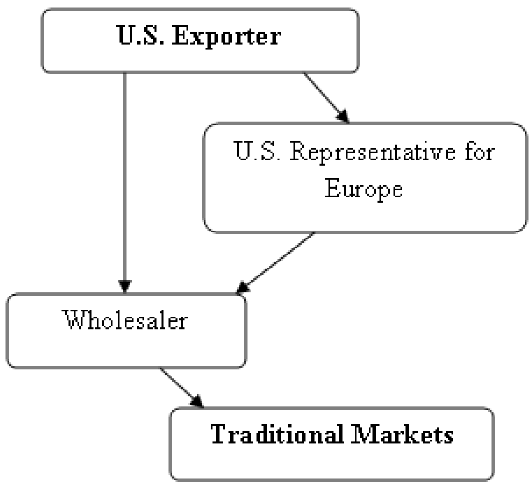
Convenience Stores

In Spain, convenience stores are usually associated with gas stations (90 percent of the total market share). However, “urban” convenience stores are popping up in Spain (10 percent of the total market share).

Convenience stores are very popular for last minute purchases. The sales through this kind of stores have largely benefited from the increasingly busy lifestyle. The main advantage pointed out by convenience store consumers include their opening hours (open longer hours than other stores). However, these stores are going through a rough time due to their high prices. After the steep decline experienced by convenience stores during the economic recession, this category is expected to grow moderately in the short term.

C. TRADITIONAL MARKETS

Market Structure



Traditional markets are composed of corner grocery stores, open-air markets, and regional markets. Wholesalers are the main suppliers for traditional markets. In this sense, large wholesalers generally import directly but smaller wholesalers do not import and buy the product through other local importers and/or larger wholesalers.

Usually, the corner grocery stores are family owned and located within residential and/or neighborhood areas. Although they are small, they usually carry a diversified range of food and cleaning products. Sanitary conditions are good and most a small refrigeration area. Although their prices are usually higher than in any other type of outlet, they are quite popular for their high quality fresh produce and their proximity. Because these stores are part of the neighborhood, some of them deliver products ordered by telephone. Their main suppliers are the cash-and-carries, which are warehouse type supermarkets and/or small wholesalers who visit once a month to take inventory and restock.

Local and regional open-air markets are also very popular. The local open-air markets sell mostly fresh produce, fresh meats, cheeses, traditional products, tree nuts, edible dry beans, and are only open in the mornings and generally run on the weekends. Their suppliers are the wholesale markets for fresh produce. The regional open-air markets can take place once a week, once a month, or sometimes once a year. Due to their popularity, they are located in the vicinity of major cities and throughout rural areas. Fresh produce and regional foods such as cheese, bread, cookies, etc. are the most common products marketed at these markets. They also sell other products that can be found at a flea market.

Of additional interest are some "specialized food stores" – gourmet type stores - which are located in the major cities. These stores specialize in particular in high quality food products such as cheese, meats, diversified types of bread, wines, regional products, etc. These stores may be compared to Deli stores and sell not only local delicatessen food products but also import some of the products. These stores are usually expensive due to the diversity and type of products presented.

SECTION III. COMPETITION

Table 9. Competitive Situation Facing U.S. Suppliers from Domestically Produces Goods and Imported Goods

Product Category (thousand metric tons; million USD)	Major Supply Sources in 2016 (in value)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Frozen Fish *Imports: 354* *Value:$817*	1. Portugal - 10% 2. France – 10% 3. Netherlands – 9% 21. USA - 2%	Other major suppliers offer high quality fish products at competitive prices.	Large competition from local suppliers and producers. Spanish domestic consumption and exports largely surpass local supply.
Almonds *Imports:101* *Value:$675*	1. USA - 85% 2. Australia - 8% 3. Germany - 1%	Competition from other supplying countries is limited, as Spanish demand for almonds is very high and production in other EU countries is not enough to satisfy demand.	Spain produces almonds, mostly used roasted as a snack, due to its organoleptic properties. U.S. almonds are processed, both to be used by the domestic industry or re-exported.
Walnuts *Imports:27* *Value:$132*	1. USA - 87% 2. France - 13% 3. Chile - 13%	France is a traditional supplier of walnuts. Chile is increasing its presence in the Spanish market.	Spain has a significant production of high quality walnuts.
Pistachios *Imports:9* *Value:$88*	1. Iran - 34% 2. Germany - 30% 3. USA - 23%	Germany is the main entry point for U.S. and Iranian pistachios to the EU. Pistachios are then re-exported to other member states.	Pistachio production in Spain is very limited and demand keeps growing.
Sunflower seeds *Imports:135* *Value:$99*	1. France - 37% 2. USA - 27% 3. China -	Growing competition from China, Argentina and Israel for confectionary.	Spain production of sunflower seeds for confectionary is not sufficient to meet demand.

	16%		
Pulses Imports:189 Value:$180	1. USA – 27% 2. Argentina - 20% 3. Mexico – 15%	Strong competition from Argentina, who largely increased their presence in recent years, and Canada, a traditional supplier to Spain.	Spain is a traditional consumer of pulses and its local production is not sufficient to fulfill internal demand.

Source: www.gtis.com

SECTION IV. BEST PRODUCT PROSPECTS

Products Present In The Market That Have Good Sales Potential

- Tree nuts, particularly almonds, walnuts and pistachios
- Peanuts
- Pulses
- Rice
- Sunflower seeds
- Fish and Seafood, fresh and frozen
- Beverages (wine and beer) and distilled spirits

Products Not Present In Significant Quantities But Which Have Good Sales Potential

- Functional and innovative health food
- Free-from products (lactose-free, gluten-free)
- Food ingredients
- High value beef meat (only Non-Hormone Treated Cattle)
- Specialty foods, snack foods and sauces
- Condiments and Sauces
- Pet foods

Products Not Present Because They Face Significant Barriers

- Red meat and meat preparations (hormone ban)
- Poultry (sanitary procedures - chlorine wash)
- Processed food (with GMO ingredients)

SECTION V. POST CONTACT AND FURTHER INFORMATION

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

Foreign Agricultural Service American Embassy, Madrid
C/ Serrano, 75
28006 Madrid Spain
Tel.: +34-91 587 2555
Fax: +34-91 587 2556
Email: AgMadrid@fas.usda.gov
Web: https://es.usembassy.gov/business/

Please email the USDA FAS Office of Agricultural Affairs in Madrid for more information. Importer listings are available from the Agricultural Affairs Office for use by U.S. exporters of U.S. ingredients. Recent reports of interest to U.S. exporters interested in the Spanish market can be accessed through the FAS website.

Additionally, a list of trade associations and useful government agencies is provided below:

Trade Associations

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)
http://www.fiab.es
fiab@fiab.es

FEHR – Federación Española de Hostelería
(Spanish Federation for HRI Sector)
http://www.fehr.es
fehr@fehr.es

ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)
http://asedas.chil.org
direc.general@asedas.org

ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)
http://www.anged.es
anged@anged.es

Asociación de Cadenas de Restauración Moderna
(Spanish Restaurant Chain Association)
http://marcasderestauracion.es
info@marcasderestauracion.es
Government Agencies

Subdirección General de Sanidad Exterior Ministerio de Sanidad, Servicios Sociales e Igualdad
(Ministry of Health, Social Services and Equality)
(Responsible for: Imported Foodstuffs, Contaminants and Compound Residues, Health Certification, Port Inspection and EU Alerts)
http://www.msssi.gob.es/profesionales/saludPublica/sanidadExterior/home.htm
saniext@msssi.es

Agencia Española de Consumo, Seguridad Alimentaria y Nutrición (AECOSAN)
(Spanish Consumption, Food Safety and Nutrition Agency) http://www.aecosan.msssi.gob.es
http://www.aecosan.msssi.gob.es/SIAC-WEB/contacto.do?reqCode=newSearch

Dirección General de Industria Alimentaria
Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente
(Ministry of Agriculture and Fisheries, Food and Environment)
http://www.mapama.gob.es
informac@mapama.es

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page.