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Exporter Guide

2016

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Report Highlights:
In 2015, Spain imported $1.9 billion of agricultural, fish and forest products from the United States. For the third year in a row, Spain's economy is expected to continue to grow at a modest pace in 2016, with record tourist numbers. This offers opportunities for certain consumer-oriented food items, as well as long-term prospects for other products. This report provides guidance to U.S. companies interested in exporting high-value consumer-ready food products to Spain and includes an overview of the country's economic situation, market structure, and export requirements.

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SECTION I. MARKET OVERVIEW

ECONOMIC TRENDS

AGRICULTURAL PRODUCTS IMPORTS ($ Million)						
	2012	**2013**	**2014**	**2015**	**2016***	**2017****
Total Agricultural, Fish and Forestry Products	37,428	38,126	39,322	35,321	36,000	37,000
Total U.S. Agricultural, Fish and Forestry Products	1,292	1,640	1,875	1,832	1,800	1,800
Total Agricultural Products	29,816	30,402	30,977	27,672	28,000	28,500
Total U.S. Agricultural Products	1,123	1,476	1,681	1,608	1,600	1,600
Total Fish and Seafood Products	6,229	6,319	6,824	6,312	6,400	6,500
Total U.S. Fish and Seafood Products	110	105	122	130	130	130

Source: Global Trade Atlas (www.gtis.com)
(*) Estimate
(**) Forecast

The economy in Spain is expected to continue to grow at a modest pace in 2016. Both private consumption and government policies drive the economy. The slow progress in alleviating the unemployment situation and a moderate rebound in exports will likely provide additional economic benefits. The country seems to be on its way out of the economic crisis that severely affected its financial system and consumer income and behavior.

Spain's GDP grew 3.2 percent in 2015 and real GDP is expected to increase by 2.8 percent in 2016. The growth in exports and another record year in tourism provide solid and necessary support to the overall economy. The recovery will continue to be slow: the high levels of public debt the pressure from the European Union to reduce such levels will force the government to make substantial cuts. This, together with the still-too-high level of structural unemployment will continue to slow down the recovery.

Spain has a diversified distribution structure for food products, ranging from traditional distribution methods -- whereby wholesalers sell to small shops that cater directly 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 client cards, cumulative discounts and special offers for frequent customers. Innovative sales techniques are becoming increasingly popular. Vending machines have spread throughout Spain over the past decade. Direct marketing by mail order, telephone, TV or e-commerce is growing considerably.

The European Union (EU) establishes the rules and regulations governing acceptable sanitary, phytosanitary, general trade, and labeling practices in Spain. As a result, U.S. exporters already exporting to other EU countries most likely are already familiar with these procedures and can meet most of the requirements for exporting to Spain. The key for a U.S. exporter wishing to enter this market is to find an agent or distributor, or to establish a subsidiary. An experienced representative in Spain will be familiar with all the different consumption patterns and preferences in each of the country's 17 autonomous regions.

The Office of Agricultural Affairs in Madrid is dedicated to helping U.S. food and agricultural product exporters access the Spanish market. Please contact us at:

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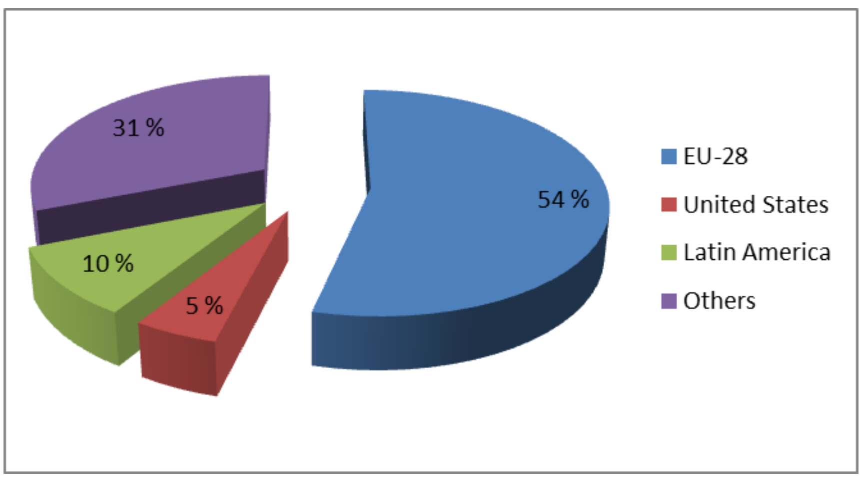
ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN SPAIN

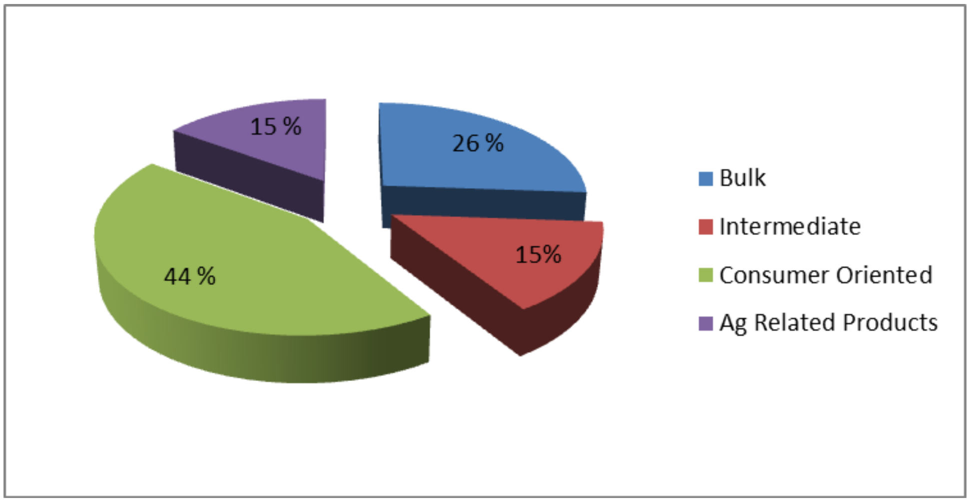
Advantages	Challenges
Spain's food industry relies on imported ingredients, many from the U.S.	Spain's slow recovery and still weak economic situation affects the retail sector with shrinking domestic demand, and lack of credit.
Tourism is a strong and ever-growing sector that provides retail, food and drink sales.	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 compared to EU products.
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.	Import tariffs impose a price disadvantage on non-EU based companies.

Spanish Market for U.S. Food and Agricultural Products
In 2015, Spain imported $35 billion of agricultural products from the world. By regions, Spain's main partner is other EU member states, as shown in the chart below:



SOURCE: Global Trade Atlas

Competition within Spain's Food and Agricultural Product Import Market
In 2015, total imports of agricultural products from the United States were divided by category as shown in the chart below:



SOURCE: Global Trade Atlas

SECTION II. BUSINESS TIPS FOR EXPORTERS

Local Business Customs

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

Spain has a number of sales channels ranging from traditional distribution methods – whereby wholesalers sell to small retail 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 in order 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 Spanish firms may speak English, but paperwork should be in Spanish.

The Spanish market is composed of a number of regional markets serviced by two major hubs, Madrid and Barcelona. The 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.

Market Entry Strategies

Market entry strategies for US products intending to enter the Spanish market should include:

1. Market research in order to assess product opportunities
2. Advanced calculations of the cost of introducing the product in the Spanish market, in order to prove its competitiveness in the local market.
3. Identify an experienced distributor or independent reliable agent to advise on import duties, sanitary regulations and labeling requirements.
4. Explore the purchasing arrangements of the larger retail channels.

General Consumer Tastes and Preferences

After years of living on constricted budgets, despite the incipient economic recovery, Spanish consumers 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. But the modest economic recovery has made some consumers slightly better off and this increase in disposable income has pushed some consumers to cautiously return to buying more branded products.

Despite the positive macroeconomic numbers expected to be shown by the Spanish economy, consumer confidence has dropped due to the "significant" drop in the expectations that the citizens have on the future of the economy and labor market. According to the Consumer Confidence Index (CCI) published in July 2016 by the Centre for Sociological Research (CIS), consumer confidence shows an important decrease compared to July 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. In July 2014, this index reached its recent highest score, but the expectations have worsened and thus, the index has gone down 10.8 points in one year.

Food Standards and Regulations

For more information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standards Report (FAIRS) and the FAIRS Export Certificate Report for the EU and Spain.

Also, please check the U.S. Mission to the European Union (USEU Mission) web page for helpful information on exporting U.S. food and agricultural products into the EU.

General Import and Inspection Procedures

Spain follows the Harmonized Nomenclature and Classification System (HS) and applies 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 World Trade Organization (WTO), including the United States, and countries with which the EU has signed trade agreements. In some instances, Free Trade Agreements negotiated between the EU and other countries provide for tariff-free access to the European market – leaving U.S. exporters at a disadvantage.

Currently, the European Union and the United States are negotiating the Transatlantic Trade and Investment Partnership (TTIP), a comprehensive trade agreement. Negotiations started in July 2013 and the fourteenth round of talks took place in Brussels, Belgium from July 11-15, 2016. The TTIP will be an ambitious, comprehensive trade and investment agreement that will offer benefits to both sides, increasing trade, creating jobs and promoting international competitiveness. Bilateral food and agricultural trade between the United States and Spain was 4 billion dollars in 2015, with the balance of trade being fairly even in recent years.

Some important issues on the table relate to market access, regulatory issues and non-tariff barriers and trade rules. The impact on trade will depend on the degree of recognition of both parts. A wide and ambitious agreement will likely benefit both sides and increase agri-food trade in the coming years. The negotiations move forward, though at a slow pace, so it is still soon to make any predictions.

The local importer has primary responsibility with the Spanish Government for imported food products once they enter Spanish territory. Therefore, the Spanish agent/importer should guide the U.S. exporter through the entire process of marketing a U.S. food or agricultural product in Spain.

The following documents are required for ocean or air cargo shipments of food products into 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 authority. The Import Certificate is obtained by the Spanish importer and/or the agent involved in the transaction and is intended for tariff classification purposes.

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

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

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

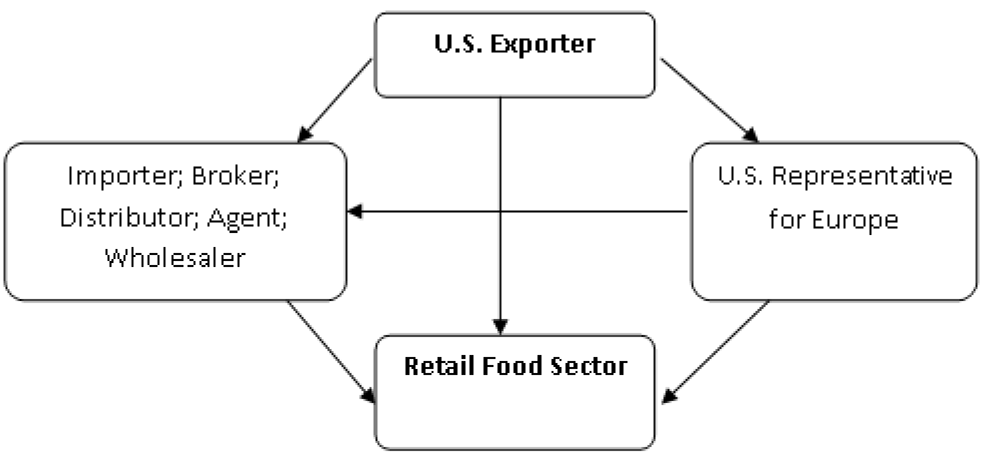
Food Retail Sector

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. Yet, the total number of retail outlets decreased over the past decade and the consolidation of the retail food industry continues to date.

In Spain, hyper and supermarkets account for some 65 percent of total food sales.

- There is increasing competition in the scope and range of product offerings, including ready-to-eat and/or ready-to-cook foods, take away meals, and home delivery - and the prices and services retailers offer consumers.
- An increasing supply of imported products has intensified competition among suppliers and retailers.
- EU Member States are the major suppliers of consumer-ready products to other EU countries.

Market Structure:



For more information on the Spanish Retail Food Sector, please consult the retail sector reports for Spain at FAS GAIN Home.

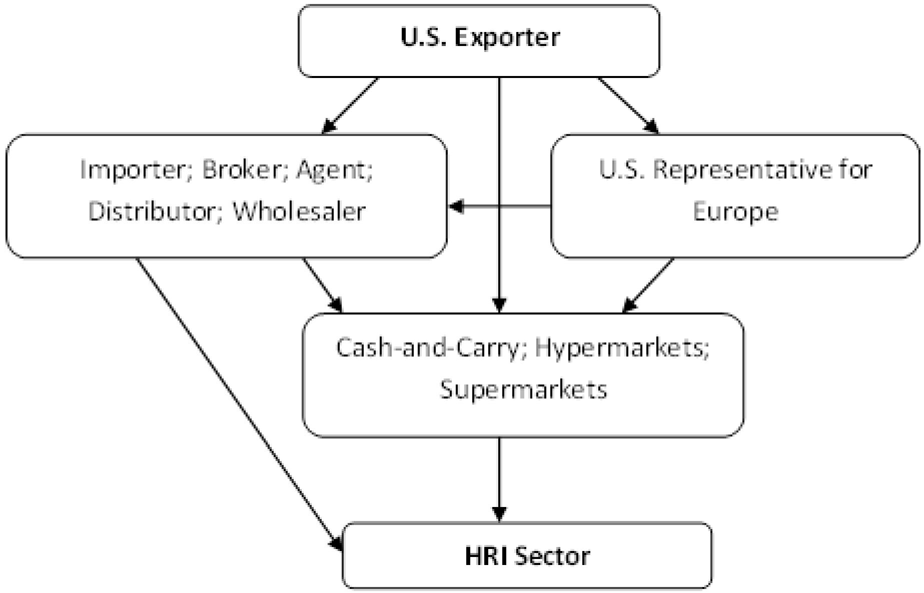
HRI Sector

Between 2008 and 2013 Spain experienced one of the most important economic recessions in its history, with soaring unemployment rates and decreasing consumers' purchasing power. This situation seriously affected the HRI sector, as Spanish consumers tried to avoid unnecessary expenses and reduced their visits to bars and restaurants. The economic situation has improved but it is still not buoyant. After a lengthy period of cutting down on unnecessary spending, Spaniards are expected to increase their spending on eating out, which will benefit this sector.

Spain is one of the top tourism destinations in the world, with increasing numbers of tourists every year, boosting demand for meals in the HRI sector. The number of tourists in Spain increased by 16 percent in the first half of 2016. The Spanish National Statistics Institute informed that a total of 33 million tourists arrived in Spain between January and June. Spanish authorities expect that 2016 will finish with a new visitors record. Tourism is one of the few sectors bringing optimism to the Spanish economy and accounts for 11 percent of the Spanish economy.

According to official statistics, Spain seems to be finally coming out of the economic crisis that affected its financial system and consumer income and behavior. The evolution of economic indicators and, especially, the expected decline in the unemployment rate, linked to the expected growth of the average disposable income, will play a crucial role in the performance of consumer foodservice in general. This will allow consumer foodservice to register positive growth in terms of number of outlets, transactions volume and current value sales. Consumers are slowly going back to the pre-crisis social habits of eating in bars and restaurants during lunch and eating out more at least once during the week.

Market Structure:



For more information on the Spanish HRI Sector, please consult the HRI sector reports for Spain at FAS GAIN Home.

Food Processing Sector

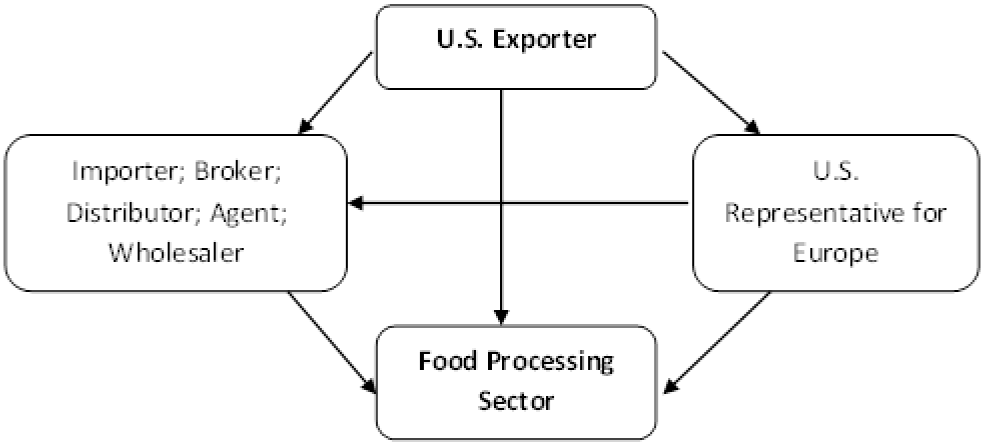
The Spanish food processing sector modernized and expanded significantly over the last thirty years. Spain now has some of the most competitive food processing industries in Europe, which makes this sector an important target for U.S. food ingredient exporters. In this sense, it is interesting to note that in 2015, the number of companies investing in Research & Development (R&D) and Innovation has gone up by 2.5 percent compared to previous year. The amount invested also increased 3.5 percent to reach $642 million. The food and beverage industry is conscious of the need to innovate in order to stay competitive and the trend is to continue and increase investing in R&D.

The food processing sector in Spain is modern, paying special attention to the quality, safety, and traceability of the food products it produces. This industry generates 22.3 percent of Spain's total industrial sales. The food industry provides 469,018 jobs, representing 21 percent of total industrial workforce. The food and drink industry in Spain comprises 28,185 companies, which represent 16.2 percent of the total industrial manufacturing companies. Three types of products concentrate two thirds of all the companies: companies producing bakery and pasta products (35.9 percent), drinks (18.1 percent), and processed and canned meat and meat products (13.8 percent).

Most food and drink processors are small companies— in 2015, 70.2 percent of the 28,185 food processors were small or medium-size companies, employing 1-49 people. The industry as a whole produced an estimated $105.4 billion (€94.9 billion) in product in 2015. Of the total 28,185 companies, 12,697 are active exporters.

The export sector is providing some positive news to the Spanish economy. Exports from the agri-food sector are keeping the positive trend since 2011. In 2015, Spain exported food and drinks for a total value of $28.2 billion (€25.4 billion), a 6.1 percent increase compared to 2014. The positive trend year-on-year provides opportunities for U.S. exporters as the demand for commodities, food ingredients and consumer oriented products to be further processed increase in order to satisfy foreign demand.

Market Structure:



For more information on the Spanish food processing sector, please consult the food processing sector report for Spain at FAS GAIN Home.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Products Present in the Spanish Market with Good Sales Potential

HS Code	Product Category	2015 Spanish Imports ($ Million)*	5 Year Average Import Growth (% Value)	Key Constraints	Attraction for U.S. Exporters
0304	Fish Fillets and Other Fish Meat (Minced, Fresh, Chilled or Frozen)	World Total: $735 U.S.A.: $51	1%	Heavy competition from other EU Member States and domestic suppliers. Unfavorable exchange rate.	Good reputation and reliability of U.S. producers. High per capita consumption of fish. Imports from the United States have significantly increased in the last 5 years.
080212	Almonds	World Total: $728 U.S.A.: $473	22%	Aflatoxin issues.	Domestic consumption of tree nuts is increasing due to their utilization in the confectionary industry.
080231 080232	Walnuts	World Total: $162 U.S.A.:$100	14%	Competition from other EU countries, mainly France.	US walnuts, both shelled and in-shell, are making inroads in Spain due to increased awareness of the

					health benefits of tree nuts.
080251	Pistachios	World Total: $77 U.S.A.:$ 20	17%	Competition from Iran and EU importers, such as Germany, who re-export this product to Spain.	Domestic consumption of tree nuts continues to increase. U.S. pistachios have a higher quality image than Iranian, the major competitor.
2208	Distilled Spirits	World Total: $996 U.S.A.:$ 146	-30%	Difference in legal format of alcohol containers; exporters need to adapt to EU size. (70 cl in the EU as opposed to 75 cl in the USA).	Increasing interest in U.S. distilled drinks. Despite the total negative growth figure, the average growth of imports from the United States in the last 5 years was 30 percent).
0713	Pulses	World Total: $181 U.S.A.:$ 43	-7%	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. Despite the total negative growth figure, the average growth of imports from the United States in the last 5 years was 19 percent).

SECTION V. KEY CONTACTS AND ADDITIONAL INFORMATION

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

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Website: http://madrid.usembassy.gov/about-us/fas.html
Email: AgMadrid@fas.usda.gov

Please consult our home page for more information on exporting U.S. food products to Spain. 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:

Spanish Trade Associations

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

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

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

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

Spanish Government Agencies

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)
Website: http://www.msc.es/profesionales/saludPublica/sanidadExterior/home.htm
Email: saniext@msssi.es

Agencia Española de Consumo, Seguridad Alimentaria y Nutrición (AECOSAN)

(Spanish Consumption, Food Safety and Nutrition Agency)
Website: www.aecosan.msssi.gob.es
Email: http://www.aesan.msssi.gob.es/SIAC-WEB/contacto.do?reqCode=newSearch

Ministerio de Agricultura, Alimentación y Medio Ambiente
(Ministry of Agriculture, Food, and Environment)
Website: www.magrama.gob.es
Email: informac@magrama.es

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

A. Spain's Key Trade and Demographic Information

Agricultural, Fish and Forestry Imports From All Countries ($Mil) / U.S. Market Share (%) 2015[1]	**$35,321/5.2%**
Consumer Oriented Agricultural Imports From All Countries($Mil)/U.S. Market Share (%) 2015[1] *	**$13,836/18%**
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 2015[1] -*	**$6,312/0.5%**
Total Population (Millions) / Annual Growth Rate (%) - 2015	**4.4/-0.16%**
Number of Major Metropolitan Areas (over 800,000 population)	**7**
Per Capita Gross Domestic Product 2015*	**$34,800**
Unemployment Rate (%) – 2015	**20.9%**
Per Capita Food Expenditures - 2015	**$1,634**

Exchange Rate (US$1 = 1 Euro) – Average Jan-Sept 2015	**$1=€0.92**

(1) Source: Global Trade Atlas (GTA)
*Estimate

B. **Spain's Food Imports (US$ Millions)**

Commodity	**Total Imports Worldwide**			**Imports from the U.S.**			**U.S Market Share %**		
	2014	**2015**	**2016***	**2014**	**2015**	**2016***	**2014**	**2015**	**2016***
CONSUMER-ORIENTED	15,296	13,836	14,000	675	796	800	4	6	6
Snack Foods (Excluding Nuts)	1,082	943	930	1	2	2	0	0	0
Breakfast Cereals and Pancake Mix	182	169	170	0	0	0	0	0	0
Red Meats Fresh/Chilled/Frozen	1,126	967	950	0	0	0	0	0	0
Red Meats Prepared/Preserved	426	428	430	0	0	0	0	0	0
Poultry Meat	342	322	320	0	0	0	0	0	0

Dairy Products	1,646	1,970	1,900	15	14	14	1	1	1
Eggs & Products	97	86	55	5	3	3	2	5	4
Fresh Fruit	1,525	1,450	1,450	0	0	0	0	0	0
Fresh Vegetables	721	717	710	0	0	0	0	0	0
Processed Fruit and Vegetables	1,385	1,281	1,250	10	7	6	1	1	1
Fruit and Vegetable Juices	319	263	270	1	2	2	0	0	0
Tree Nuts	951	1,132	1,320	613	740	750	64	65	57
Wine and Beer	551	502	500	1	2	2	0	0	0
Nursery Products & Cut Flowers	222	206	200	8	6	6	4	3	3
Pet Foods (Dog and Cat Food)	287	280	280	3	3	3	1	1	1
Other Consumer-Oriented Products	3,421	3,104	3,100	16	16	16	0	0	0
FISH & SEAFOOD PRODUCTS	6,824	6,312	6,400	122	130	135	2	2	2
Salmon	322	315	300	0	0	0	0	0	0
Crustaceans	1,667	1,542	1,500	40	36	36	2	2	2
Groundfish and Flatfish	557	502	500	1	0	0	0	0	0
Molluscs	1,368	1,337	1,330	12	17	16	1	1	1
Other Fishery Products	2,909	2,615	2,700	68	77	80	2	3	3
AGRICULTURAL PRODUCTS TOTAL	30,976	26,672	27,000	1,681	1,608	1,600	5	6	6
AGRICULTURAL FISH & FORESTRY TOTAL	39,322	35,321	36,000	1,875	1,832	1,800	4	5	5

Source: GTA
*Estimate

C. Spain's Top 15 Food Import Suppliers

SPANISH IMPORTS OF CONSUMER-ORIENTED AGRIC.		**SPANISH IMPORTS OF FISH AND SEAFOOD PRODUCTS**

PRODUCTS (US$ 1,000)					**(US$ 1,000)**			
	2013	**2014**	**2015**			**2013**	**2014**	**2015**
France	3,610,682	3,407,139	2,814,605		Morocco	510,961	602,279	584,921
Germany	1,969,760	2,009,476	1,720,673		Ecuador	456,942	449,142	439,674
Netherlands	1,703,433	1,695,819	1,515,063		Argentina	479,418	465,916	435,698
Italy	1,019,179	1,139,788	1,024,846		France	415,196	416,130	387,858
Portugal	944,674	1,075,470	867,429		Portugal	324,079	384,987	370,678
United States	532,443	675,174	796,280		Netherlands	312,881	380,777	330,237
Belgium	784,177	743,930	651,958		China	342,247	326,765	324,310
Morocco	313,598	408,221	453,333		United Kingdom	238,052	276,270	236,244
United Kingdom	459,764	461,291	447,275		Sweden	192,183	216,157	201,980
Poland	276,942	304,534	332,072		Denmark	192,996	213,251	200,478
Denmark	364,995	373,889	311,381		Namibia	220,160	231,380	199,855
Peru	280,194	279,605	267,267		India	153,092	200,049	197,185
Brazil	278,433	266,421	250,803		Mauritania	103,833	146,233	185,674
China	220,266	238,944	225,045		Peru	129,996	171,774	165,260
Ireland	391,241	222,375	200,133		Chile	165,999	156,482	158,937
Other	1,911,312	1,994,210	1,957,601		Other	2,081,140	2,186,397	1,893,195
World	15,061,093	15,296,286	13,835,764		World	6,319,175	6,823,989	6,312,184

Source: GTA