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Food Processing Ingredients

Driving the Spanish Economy, the Food Industry Seeks more Food Ingredients Abroad

2019

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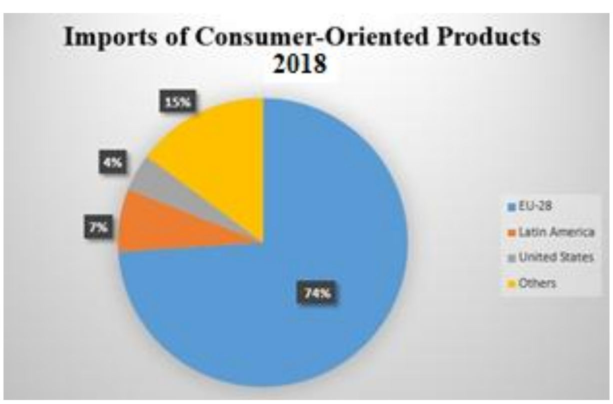
Report Highlights:
In 2018, Spain imported $2.35 billion worth of agricultural, fish and forest products from the United States. As Spain maintains its economic recovery, the food-processing sector continues to consolidate its position and importance as the main industrial sector in the country. Spain has some of the most competitive food processing industries in Europe, which makes this sector an important market for U.S. food ingredient exporters.

Market Fact Sheet: Spain

Currently, Spain is the 14th largest economy in the world and the 5th in the European Union. Spain is a major producer and exporter of food and agricultural products with other EU countries as its primary export destination. Spanish producers, processors, wholesalers, retailers, food service operators, and importers are all part of a well-developed agribusiness sector, contributing to a competitive and dynamic domestic scenario. After years of deep economic recession, the Spanish economy grew at least 3 percent for the third straight year. Spain is now one of the fastest growing economies in the EU. In 2018, Spain's total imports of agricultural products are expected to reach $45 billion.

SWOT Analysis	
Strengths	***Weaknesses***
One of the fastest growing Euro zone economies	High public debt
Opportunities	***Threats***
Competition policy to reduce market rigidities	Political uncertainty Brexit

Imports of Consumer-Oriented Products
Goods imported into the Spain must meet the EU sanitary and phytosanitary requirements to protect human and animal health and as part of the custom union. Hence, U.S. exporters already exporting to other EU member states will likely meet most of the Spanish import requirements. For the export of animal product, the production plant must be approved for export to the EU.



Food Processing Industry

In 2019, the food-processing sector will continue to consolidate its position and importance as the main industrial sector pushing the economic recovery. Spain enjoys a modern food-processing sector that pays special attention to the quality, safety, and traceability of the food products it produces. It has one of the most competitive food processing industries in Europe, which makes this sector an important target for U.S. exporters of food ingredients. Food processing mainly focuses on supplying the domestic market, which accounts for 70 percent of sales.

Food Processing Industry Facts 2017

Food Processing Industry	$119.6 billion
Output Food Exports	$35.3 billion
Commercial Surplus	$9.4 billion
No. of Employees	503,675
No. of Food Processors	29,018
% of total GDP	3%
% of Industrial GDP	20%

Food Retail Industry

In 2017, Spanish food retail sales reached $118.7 billion. Spain's improved economic environment increased consumer confidence and expenditures and contributed to better retail sales. In addition, Spain continues to host record numbers of tourists, which also boosts food demand. In 2017, the largest store-based food retailers where Mercadona, Grupo Carrefour and Grupo Eroski. In the medium term, Post expects Internet retailing to see the fastest growth.

Top 10 Spain Country Retailers

Retail Organization	Ownership	Sales 2018* ($ Million)
MERCADONA	Spanish	24,000
CARREFOUR	French	11,000
EROSKI	Spanish	5,500
AUCHAN	French	5,300
DIA	French	5,000
LIDL	German	4,200
EL CORTE INGLES	Spanish	3,400
CONSUM, S. COOP.	Spanish	2,800
AHORRAMAS	Spanish	1,900
MAKRO	German	1,500

***Estimate**
Data and Information Sources: Euromonitor, GTA, Eurostat, FIAB
Contact: AgMadrid@fas.usda.gov

SECTION I. MARKET SUMMARY

In 2018, the food processing sector continued to consolidate its position and importance as the main industrial sector pushing the economic recovery. Spain has some of the most competitive food processing industries in Europe, which makes this sector an important target for U.S. food ingredient exporters.

Spain enjoys a modern food-processing sector that pays special attention to the quality, safety, and traceability of the food products it produces. This sector provides 503,675 jobs, representing 21 percent of the total industrial workforce. The food industry in Spain comprises mostly small companies— in 2017, only 4 percent of the 29,018 food processors employ 50 people or more. In 2017, the industry as a whole produced an estimated $118.7 billion in product, up 2.9 percent compared to 2016.

The export sector keeps bringing positive news to the Spanish economy. Exports from the agri-food sector have trended upward since 2009. According to the annual data published by the Spanish Food and Drink Industry Federation (FIAB), the value of Spanish exports in 2017 was $35.3 billion. This positive trend provides opportunities for U.S. exporters as the demand for commodities, food ingredients, and consumer-oriented products for further processing continues to increase in order to satisfy foreign demand.

Table 1. Advantages and Challenges Facing U.S. Food Processing Ingredients

Advantages	Challenges
Tourism is a strong and ever-growing sector that provides sales in the food sector, as well as demand for more international foods.	Food imported from third countries, including the U.S., must comply with EU food law, which varies considerably from U.S. regulations and practices.
Spain's food industry relies on imported ingredients, many from the U.S.	Lack of consumer awareness of U.S. brands, applicability, and varieties of U.S. products
Diversity of food products in the market is increasing. Consumers are becoming more	Competition from neighboring EU countries, where tastes and traditional products may be better known
Good network of agents and importers to help get product into the market	U.S. exports face higher transportation costs. In addition, small exporters face difficulties in shipping mixed or smaller container loads versus EU competitors or big exporters.
Consumers are increasingly health conscious, demanding new products.	EU labeling, traceability, and packaging laws
Distribution structure is modern and many companies cover both Spain and Portugal.	High import tariffs, new and potential retaliatory tariffs, and import regulations impose a price disadvantage on non-EU based companies.
Good image and reputation of U.S. products	High marketing costs (advertising, discounts, etc.) are necessary.

SECTION **II. ROAD MAP FOR MARKET ENTRY**

Entry Strategy

Success in introducing products in the Spanish market 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 Office of Agricultural Affairs in Madrid maintains listings of potential importers and develops sector-specific information to help you introduce your product in Spain.

Customs are involved in the implementation and enforcement of EU legislation relating to imports, not only for customs duties and commercial policy measures, but also as regards security, environmental, anti-dumping, consumer protection, cultural and agricultural controls. Goods imported into the EU must meet the sanitary and phytosanitary requirements to protect human and animal health and as part of the custom union. Though Spain implements harmonized EU rules and regulations, there are subtleties that exporters should learn about if considering exporting to Spain. For more information, we invite potential U.S. exporters to contact our office for additional sector-specific information. U.S. exporters already exporting to other member states will likely be meeting most of the requirements for exporting to Spain.

Typically, operators buy their food ingredients from importers or wholesalers. Some large companies buy directly from foreign suppliers. Spain exports around 20 percent of the Spanish food production, mainly to the EU. Some food-processing companies concentrate on the domestic or on export markets, but most of them will have mixed customers. Companies supplying mainly the domestic market frequently market their products directly and have their own logistic infrastructure. However, their customers will vary from wholesalers to buying groups and retailers. Companies producing for re-export may have their own marketing office overseas, local agents or may work with local importers.

U.S. exporters also face great challenges with EU labeling and traceability regulations. Labeling is required for any product that contains genetically modified ingredients. See more on labeling details under Import Procedures.

Import Procedures

Spain follows the Harmonized Nomenclature and Classification System (HS) and applies EU 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, negotiations and trade agreements in place between the EU and other countries provide for advantageous access to the European market.

Currently, the EU and the US have the following agreements and arrangement in place:

- US-EU Organic Equivalency Arrangement
- US-EU Wine Agreement
- Veterinary Equivalency Agreement

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. Most food products require an Import Certificate issued by the competent authority. The Spanish importer obtains the Import Certificate and/or the agent involved in the transaction and serves for tariff classification purposes.

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

The Standard U.S. label does not comply with the EU's labeling requirements. U.S. exporters now face even greater challenges, because of the new EC labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled for consumer informational purposes. Since consumers have relatively low acceptance of genetically modified foods, food processors, retailers and the HRI sector are reluctant to purchase these processed products or food ingredients for processing. For all the details, visit the EU labeling requirements section of the USEU Mission webpage.

If your product is or contains plant or animal products, it will require a phytosanitary or health certificate issued by the competent U.S. authority. In addition, if you are exporting animal products, your production plant has to be approved to export into the EU.

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 all the details, check the U.S. Mission to the European Union web page, which will guide you on exporting into the EU.

Trade Shows

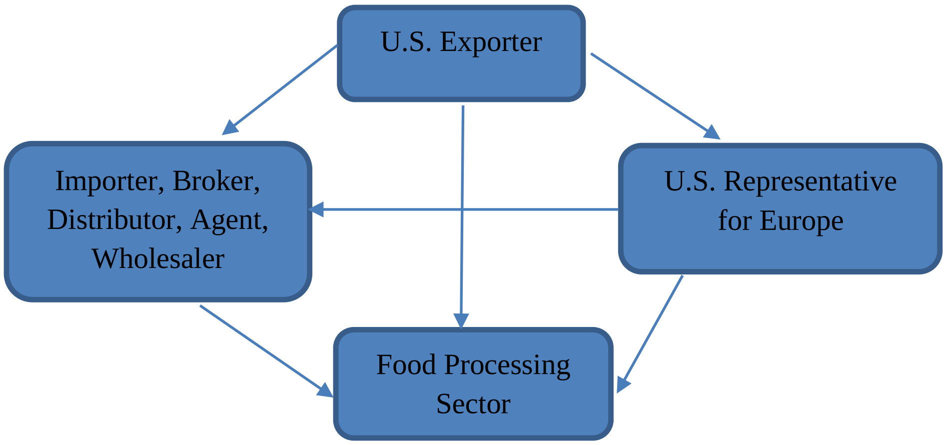
Trade shows in Spain offer excellent opportunities for U.S. exporters to make contact with potential clients or business partners from Spain, other EU countries and other continents.

The most important trade shows related to the food-processing sector are:

Alimentaria - International Food and Beverages Exhibition
Dates: April 20-23, 2020
Place: Fira Barcelona, Barcelona
Frequency: Bi-annual

Nutraceuticals Europe – Summit & Expo
Dates: February TBD, 2020
Place: IFEMA, Madrid
Frequency: Annual

Market Structure



Company Profiles

The Spanish food-processing sector has a wide range of food processing companies, many of them importing food ingredients. The Spanish food industry consists of 29,018 companies. The table below shows how these companies are distributed among the main sectors:

Table 2. Food Processing Industry by sector (Million $)

	2017	% change 2016	% food and beverage industry
Meat & Meat Products	26,851	0.9	23.02
Fishery Products	5,174	2.3	4.44
Fruits & Vegetables	9,788	5.5	8.39
Dairy Products	9,105	2.8	7.80
Milling Industry	3,736	4.7	3.20
Beverages	16,529	2.9	14.17
Bread and Pasta	8,611	4.8	7.38
Fats & Oils	13,065	2.1	11.20
Animal Feed	10,584	3.8	9.07
Other Foods	13,215	7.0	11.33

Source: FIAB

See Appendix for details of the main companies operating in the Spanish food-processing industry.

Sector Trends

"Invest in Spain," recently published "Investment trends and records in Spain" report. This report (in English) contains useful and up to date information on Spain's economy, reforms to increase competitiveness, employment trends, foreign investment, amongst other topics to understand the Spanish business climate.

Spanish imports of U.S. agricultural, fish and forest products recovered since 2009. At that time, imports of U.S. food and agriculture decreased considerably partly due to the strong Euro and Spain's strong dependency to import bulk commodities. Spain's total imports from the United States grew from $996 million in 2009 to $2.35 billion in 2018.

Many U.S. companies are present in Spain, either through joint ventures, acquisitions, etc. Some examples of U.S. companies in the Spanish food and beverage industry are, in alphabetical order:

- Bunge: Fats and Oils
- Cargill: Fats, Oils, additives, pet food
- Coca Cola: Beverages, snacks
- H.J. Heinz Foods Spain: Prepared vegetables
- Mondelez International: Cheese, snacks
- Kellogg España: breakfast cereal
- Pepsico: Beverages, juices, snacks

Major consumption trends:

- Demographic evolution is driving changes in consumer buying habits, due to smaller households. Single and two person households are growing and households of four or more persons declining. Thus, consumers demand smaller portions. Also, the increasing percentage of elderly people is another trend that will require adjustments in market supply.

- In the years of economic crisis consumers turned towards private labels, usually associated with lower prices, and away from branded products. Now, private labels are looking for new marketing ways to retain customers.

- The promotion of healthier lifestyle and habits is a hot topic in the general and social media. Within the trend towards staying young, fit and healthy, consumers are increasingly buying healthy and functional foods.

- In line with healthy food, the organic food market, still seen as a niche market, is now moving into the mainstream of the food industry. Apart from the shops that specialize on this type of products, nowadays they are available in super and hypermarkets.

- Larger food processors rely on the export or re-export market to remain competitive and operate at a higher capacity utilization rate.

SECTION III. COMPETITION

Spain's main trading partner is the EU-28. Other EU member states are the main competitors of US products intended for the food processing industry. The lack of trade tariffs, trade barriers and other restrictions inside the European Union make European goods more attractive and competitive, particularly to price sensitive goods.

Product Category* **(TMT; million USD)**	**Major Supply Sources in**	**Strengths of Key Supply Countries**	**Advantages and Disadvantages of Local Suppliers**
Frozen Fish *Imports:330* *Value:$900*	1. Portugal - 10% 2. Netherlands – 5% 3. El Salvador – 4%	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:100* *Value:$530*	1. USA - 87% 2. Australia - 8% 3. Germany - 3%	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 used by the domestic industry or re-exported.
Walnuts *Imports:30* *Value:$180*	1. USA - 80% 2. France - 10% 3. Chile - 8%	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:11* *Value:$110*	1. USA - 34% 2. Iran - 30% 3.Germany- 20%	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:220* *Value:$130*	1. France - 45% 2. China - 25% 3. USA - 17%	Growing competition from China, Argentina and Israel for confectionary.	Spain production of sunflower seeds for confectionary is not sufficient to meet demand.
Pulses *Imports:245* *Value:$210*	1. USA – 25% 2. Argentina - 14% 3. Canada – 11%	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.

*Estimate

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Table 3. Agricultural and Food Import Statistics

AGRICULTURAL PRODUCTS IMPORTS ($ Million)					
	2015	**2016**	**2017**	**2018***	**2019****
Total Agricultural, Fish and Forestry Products	36,659	38,003	41,733	43,000	45,000
Total U.S. Agricultural, Fish and Forestry Products	1,981	1,857	1,638	1,900	2,000
Total Agricultural Products	27,647	28,067	30,987	32,000	33,000
Total U.S. Agricultural Products	1,607	1,487	1,319	1,500	1,600
Total Fish and Seafood Products	6,364	7,022	7,920	8,500	9,000
Total U.S. Fish and Seafood Products	134	134	103	104	105

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

Best High-Value, Consumer-Oriented Product Prospects Category

Products Present in the Market with 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 with 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
- 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. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions or comments regarding this report or need assistance exporting to Spain, please contact the 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
Email: AgMadrid@fas.usda.gov
Web: https://es.usembassy.gov/business/

The FAS website offers recent reports of interest to U.S. exporters interested in the Spanish market. Additionally, please find below a list of trade associations and useful government agencies:

Spanish Trade Associations

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)
FEHR – Federación Española de Hostelería
(Spanish Federation for HRI Sector)
ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)
ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)
Asociación de Cadenas de Restauración Moderna
(Spanish Restaurant Chain Association)

Spanish Government Agencies

Ministerio de Sanidad, Consumo y Bienestar Social
(Ministry of Health, Consumption and Social Welfare)
Agencia Española de Consumo, Seguridad Alimentaria y Nutrición (AECOSAN)
(Spanish Consumption, Food Safety and Nutrition Agency)
Ministerio de Agricultura, Pesca y Alimentación
(Ministry of Agriculture, Fisheries and Food)

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

For more information on main companies operating in the Spanish Food Industry see Appendix attached.

APPENDIX
Main Companies Operating in the Food Processing Industry

RED MEATS AND POULTRY PRODUCTS			
RED MEATS			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Campofrío Food Group, S.A.**	2,296	Retail & HRI	Local products/ Imports
Corp. Alim. Guissona, S.A.**	1,920	Retail & HRI	Local products/ Imports
ElPozo Alimentación, S.A.**	1,295	Retail & HRI	Local products/ Imports
Coop. Orensanas (COREN)**	1,185	Retail & HRI	Local products/ Imports
Casa Tarradellas, S.A.**	1,052	Retail & HRI	Local products/ Imports
POULTRY PRODUCTS			
Corp. Alim. Guissona, S.A.**	1,920	Retail & HRI	Local products/ Imports
Coop. Orensanas (COREN)**	1,185	Retail & HRI	Local products/ Imports
Grupo Sada P.A., S.A.**	439	Retail & HRI	Local products/ Imports
Uve, S.A. (Grupo)**	438	Retail & HRI	Local products/ Imports
Procavi, S.L.	306	Retail & HRI	Local products/ Imports

CANNED FISH			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Luis Calvo Sanz, S.A. (Grupo)**	709	Retail & HRI	Local products/ Imports
Grupo Jealsa Rianxeira**	724	Retail & HRI	Local products/ Imports
Frinsa del Noroeste, S.A.	465	Retail & HRI	Local products/ Imports
Gr. Conservas Garavilla, S.L.**	396	Retail & HRI	Local products/ Imports
Ricardo Fuentes e Hijos, S.A.**	251	Retail & HRI	Local products/ Imports

DAIRY PRODUCTS			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Grupo Lactalis Iberia, S.A.**	1,376	Retail & HRI	Local products/ Imports
Danone, S.A.**	913	Retail & HRI	Local products/ Imports
CAPSA FOOD **	818	Retail & HRI	Local products/ Imports
Ind. Lácteas Asturianas, S.A. **	736	Retail & HRI	Local products/ Imports
Calidad Pascual, S.A.U.**	714	Retail & HRI	Local products/ Imports

PREPARED FRUITS & VEGETABLES			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Conservas El Cidacos, S.A.**	263	Retail & HRI	Local products/ Imports
Grupo Angel Camacho, S.L.**	241	Retail & HRI	Local products/ Imports
Grupo Ybarra Aliment., S.L. **	218	Retail & HRI	Local products/ Imports
Grupo Helios**	206	Retail & HRI	Local products/ Imports
Hero España, S.A. **	200	Retail & HRI	Local products/ Imports

BAKED PRODUCTS			
Company	**Sales 2018**	**End-User Channels**	**Procurement Channels**

	(Million $)*		
Grupo Siro	495	Retail & HRI	Local products/ Imports
Grupo Bimbo	407	Retail & HRI	Local products/ Imports
Grupo Dulcesol	373	Retail & HRI	Local products/ Imports
Bimbo Donuts Iberia, S.A.	344	Retail & HRI	Local products/ Imports
Granja San Francisco, S.L.	36	Retail & HRI	Local products/ Imports

BAKED PRODUCTS (COOKIES)			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Mondelez – Cookies Division	2,867	Retail & HRI	Local products/ Imports
Grupo Siro	495	Retail & HRI	Local products/ Imports
Grupo Adam Foods	429	Retail & HRI	Local products/ Imports
Galletas Gullon, S.A.	391	Retail & HRI	Local products/ Imports
Cerealto Foods, S.L.	184	Retail & HRI	Local products/ Imports

SNACK FOODS: SNACKS AND NUTS			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Grupo Siro	495	Retail & HRI	Local products/ Imports
Importaco, S.A. - Grupo **	475	Retail & HRI	Local products/ Imports
Grupo Bimbo	407	Retail & HRI	Local products/ Imports
Borges Branded Foods, S.L.U.**	312	Retail & HRI	Local products/ Imports
Frit Ravich, S.L.	248	Retail & HRI	Local products/ Imports

CONDIMENTS AND SEASONINGS			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
BAIEO **	521	Retail & HRI	Local products/ Imports
Borges Branded Foods, S.L.U.**	312	Retail & HRI	Local products/ Imports
Grupo Ybarra Aliment., S.L. **	218	Retail & HRI	Local products/ Imports
Bolton Cile España, S.A.**	84	Retail & HRI	Local products/ Imports
Jesús Navarro, S.A.**	81	Retail & HRI	Local products/ Imports

SAUCES			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Unilever España, SA.**	696	Retail & HRI	Local products/ Imports
Conservas El Cidacos, S.A.**	263	Retail & HRI	Local products/ Imports
Grupo IAN, S.A.U.**	191	Retail & HRI	Local products/ Imports
Compre y Compare - Grupo**	151	Retail & HRI	Local products/ Imports
H J Heinz Food Spain, S.L.**	108	Retail & HRI	Local products/ Imports

DRY GOODS: RICE, PASTA AND PULSES

RICE			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Ebro Foods, S.A. – Rice Division	1,539	Retail & HRI	Local products/ Imports
DACSA**	276	Retail & HRI	Local products/ Imports
Cooperativa Arrozúa	45	Retail & HRI	Local products/ Imports
Arrocerias Pons, S.A.	69	Retail & HRI	Local products/ Imports
Coop. Camara Arrossera del Montsia I Seccio de Credit	36	Retail & HRI	Local products/ Imports
PASTA			
Ebro Foods, S.A. Group **	2,868	Retail & HRI	Local products/ Imports
Nestlé España, S.A. **	2,205	Retail & HRI	Local products/ Imports
The GB Foods, S.A.**	833	Retail & HRI	Local products
Galletas Siro, S.A. – Grupo **	565	Retail & HRI	Local products
Acesur - Grupo **	748	Retail & HRI	Local products
PULSES			
SEPROLESA, S.A.	81	Retail & HRI	Local products/ Imports
Legumbres Luengo, S.A.	73	Retail & HRI	Local products/ Imports
Acico, S.A. – Grupo	25	Retail & HRI	Local products
Conservas El Cidacos, S.A.	18	Retail & HRI	Local products
Legumbres La Cochura, S.A.	17	Retail & HRI	Local products/ Imports

SPECIALIZED FOOD INGREDIENTS			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Bunge Ibérica, S.A.	2,575	Food Manufacturers	Local products/ Imports
Cargill España (Grupo)**	1,835	Food Manufacturers	Local products/ Imports
Viscofan, S.A.	894	Food Manufacturers	Local products/ Imports
Quimidroga, S.A.**	830	Food Manufacturers	Local products/ Imports
Indukern, S.A.	487	Food Manufacturers	Local products/ Imports

BEVERAGES: Alcoholic and Non-Alcoholic			
Company	**Sales 2018 (Million $)***	**End-User Channels**	**Procurement Channels**
Coca-Cola Iberia**	3,326	Retail & HRI	Local products/ Imports
Mahou, S.A. - Grupo	1,447	Retail & HRI	Local products/ Imports

S.A. Damm (Grupo)	1,322	Retail & HRI	Local products/ Imports
Heineken España	1,156	Retail & HRI	Local products/ Imports
J. García Carrión, S.A.	953	Retail & HRI	Local products/ Imports

* Estimated
** Data includes activities in other sectors