



Flanders
State of the Art

A photograph of a food processing machine, likely a pasta or noodle extruder, showing a conveyor belt with rows of small, round, ridged pasta pieces. The machine is made of metal and has various rollers and adjustment knobs.

FOOD PROCESSING INDUSTRY

IN SPAIN

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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THE FOOD PROCESSING

INDUSTRY IN SPAIN

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April 2018

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2. DOING BUSINESS IN SPAIN

The economic situation of Spain is quite positive at this very moment. It seems like the country is finally recovering from its recent economic malaise and is getting more attractive to do business in again. The GDP of Spain is 1.163.662 million euro, and the projected growth of the country's economy is 2.4% in 2018, and 2.1% in 2019. On the basis of GDP this makes Spain the 14th largest economy in the whole world.

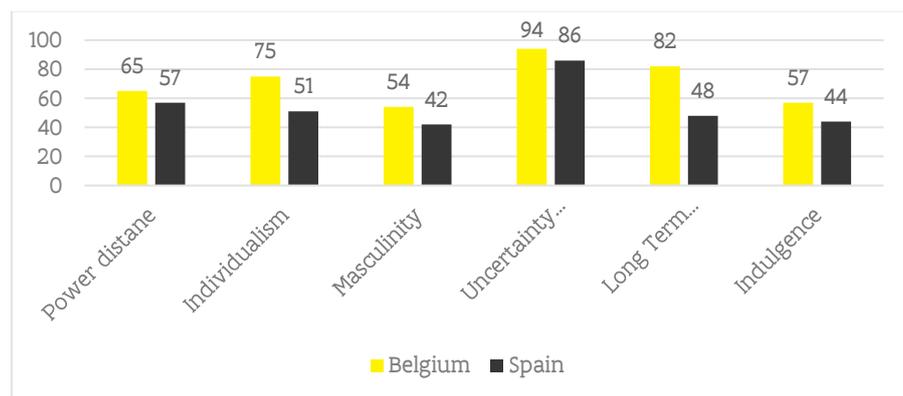
Spain is a relatively easy country to do business in because the European regulations are applied. Secondly, the country ranks 28th out of 190 countries when it comes to the ease of doing business. Besides, the country has a normal commercial risk. This means the Spanish buyers have the payment capacity, even though there exists a certain laxity or slowness. Furthermore, the country has a very low political risk. It can be concluded that Spain is an attractive country to do business in.

The country imported goods for a total of €279,438 millions of goods in 2016 and exported for €259,658 million in that same year. There is almost a balance between import and export, which is good. It also traded a lot with Flanders in that year. Flanders exported goods for €7,505 millions to Spain, and imported for €7,078 million from Spain.¹

The most promising sectors in Spain are currently logistics and transport, the creative industry (fashion, architecture, PR, ...), food, tourism and hospitality, IT, healthcare, pharma and biotechnology.

The most important and biggest cities in Spain are Madrid (the capital), Barcelona, Valencia, Sevilla and Zaragoza. This is something to take into account when doing business in the country. Furthermore, there are 17 regions in Spain that are all autonomous. They all have the same way of doing business, but small differences can occur from region to region.

Figure 1: Hofstede 6 Dimensions Model - Comparison between Belgium and Spain, 2018



The Spanish culture (black) in general can be compared to the Belgian culture (yellow), according to Geert Hofstede's 6 dimensions model (figure 1)². The biggest difference is in individualism and long-term orientation. Spain is, besides Portugal, the least individualistic country in Europe. Compared to the rest of the world, it still is a very individualistic country. The

Spaniards think more in terms of "we" and "us" than Belgians.

¹ Source: <https://www.flandersinvestmentandtrade.com/export/landen/spanje/cijfers>

² Source: <https://www.hofstede-insights.com/country-comparison/belgium/spain/>

The long-term orientation is also a very significant difference between the two countries. Belgian people are more looking to the future and are planning everything in advance, while Spaniards live more in the moment and the rest will be dealt with “mañana”. This also counts for arranging business meetings. Most of the business meetings are planned at the very last minute.

The most common way to do business in Spain as a foreign enterprise is to collaborate with local distributors. They know the Spanish market best and they know how to push the products to the consumers. An important remark is the fact that the knowledge of foreign languages is limited, this even applies to English. When doing business in the country, it is recommended to bring a good translator during business meetings and to communicate as much as possible in Spain.

3. GENERAL OVERVIEW OF THE SPANISH FOOD PROCESSING INDUSTRY

The food processing sector can be divided into seven sub-sectors. Each of these sub-sectors has its own needs and developments:

- Meat
- Bakery & patisserie
- Dairy
- Fish
- Preserving
- Olive oil
- Nutritional drinks

The Spanish food and beverage industry is – with a production of almost 94 billion euro – the most important industry for the Spanish economy, and one of the most important ones in Europe when it comes to production, employment and exports.

When it comes to the Spanish food processing equipment and machinery industry, one can say that this market is in the maturity phase, because the market is saturated. About 200 Spanish companies are active in this industry, with small and mid-sized companies that have the biggest market share. Most of these companies collaborate with bigger companies and/or multinationals. Therefore, it is important to continue providing a good client service and to provide technological improvements and innovations to maintain or even increase their market share. This means that the food processing industry requires a lot of machines and good equipment. Worth mentioning is the fact that Spain is well known for its technological solutions and constant innovation in the food processing industry and has one of the most modern food processing sectors in Europe. Furthermore, the Spanish food processing industry focusses on several topics such as food hygiene, functional design and integration, and machine safety.

Spain welcomes a lot of tourists every year. All these people try the Spanish cuisine, and they want to keep eating the ingredients when they are back home. This makes that Spain has to export a lot of its

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food products. However, it is not only the food products that get exported, it is also the know-how about packaging, processing, cultivating, etc.

The machinery manufacturing sector for the food processing industry does not only provide the food sector as a whole, it also serves each sub-sector individually. This means that the food processing machinery industry gets its clients from every sub-sector. On top of selling the machinery and equipment, this sector also provides engineering services. Every single enterprise tries to stand out in the crowded market.

The Spanish sector is internationally known for its flexibility and adaptability to the trends and needs of the food and beverage production sector. It is an industry offering both tradition and a high level of technology, and in recent years it has invested heavily in innovation and specialization. Moreover, the country has one of the most modern food processing sectors in Europe and in the whole world.

4. CURRENT SITUATION IN THE FOOD PROCESSING INDUSTRY

4.1 CHALLENGES IN THE FOOD PROCESSING (MACHINERY) INDUSTRY

The first challenge in the food processing machinery industry is the food safety. This is the main issue in the global market because the consequences of failure can be really bad. First of all, the costs of it can be very high, and second of all, the public and customer confidence can decrease a lot. A lot of companies active in the sector receive product recalls, even though they are being very careful. Nowadays the consumers are more aware of these challenge and demands to improve the food safety.

Second of all, there is cost control and worker safety. These are both important issues for the sector. Interviews with several food processing machinery manufacturers have shown that these are some of their biggest challenges & concerns. For the manufacturers automation and capacity expansion are very important, but the increase of automation in the food processing industry is a big challenge. They claim that the use of machinery while processing food adversely affects the quality of the products because the whole process goes a lot faster than it would go naturally. Also, the use of machinery takes away jobs, which are already scanty in the country. There will always be opposition on this topic.

Another challenge in the industry is the increasing demand for meat, poultry, dairy and seafood products. Food processing (machinery) manufacturers must take these changes in account and respond to them. This can be seen as an opportunity for companies who want to enter the market.

Furthermore, consumers are paying more attention to ecological issues on the ecology, and the cost of electricity is increasing a lot. Thus, food processing machinery enterprises are constantly challenged to find the best solution to process their food in the most sustainable way, so they can meet the demand of the consumers, while at the same time minimizing their energy coasts.



This goes along with the increasing need for organic food. Besides the fact that the organic food production industry has not grown a lot over the past year(s) in the domestic market and this market is quite saturated, natural and organic food are becoming more and more popular amongst Spanish consumers. This is something to keep in mind when you want to do business in Spain in this sector.

4.2 CURRENT SITUATION IN THE INDUSTRY

Even though there are some challenges in the food processing industry in Spain, the country has one of the most modern food processing sectors in Europe and in the world. The manufacturers are experts in quality, safety and traceability of the food products that they produce. Also, engineering has become more important the last few years. Engineers are actively integrated in the food processing (machinery) companies to maintain or improve the quality of the machines.

Figure 2: Basic data on the food industry in Spain – ICEX, 2014

Sector ³	Net Sales (Million euro)	People employed
Meat industry	€ 19.499,00	€ 101.306,00
Fish Processing	€ 4.107,00	€ 22.622,00
Fruit and vegetable processing	€ 7.155,00	€ 39.056,00
Manufacture of fats and oils	€ 8.427,00	€ 14.716,00
Diary industry	€ 8.322,00	€ 31.874,00
Milling products	€ 3.323,00	€ 7.896,00
Animal feed products	€ 8.984,00	€ 15.673,00
Bread, cakes and biscuits	€ 6.630,00	€ 96.075,00
Sugar, chocolate and cocoa	€ 4.788,00	€ 25.000,00
Other products	€ 4.827,00	€ 28.486,00
Production of alcoholic beverages	€ 9.586,00	€ 41.548,00
Mineral water and soft drinks	€ 4.519,00	€ 1.558,00

Figure 2 provides basic information on the food industry in Spain. In 2014, the meat industry was by far the biggest, most important and most competitive sector in the country. Because the sector is so big, there are a lot of opportunities for machinery manufacturers who are specialized in machinery for the meat industry.

³ Source: <https://www.icex.es>

Figure 3: Spain food processing machinery manufacture revenue (in million U.S. dollars) - Statista

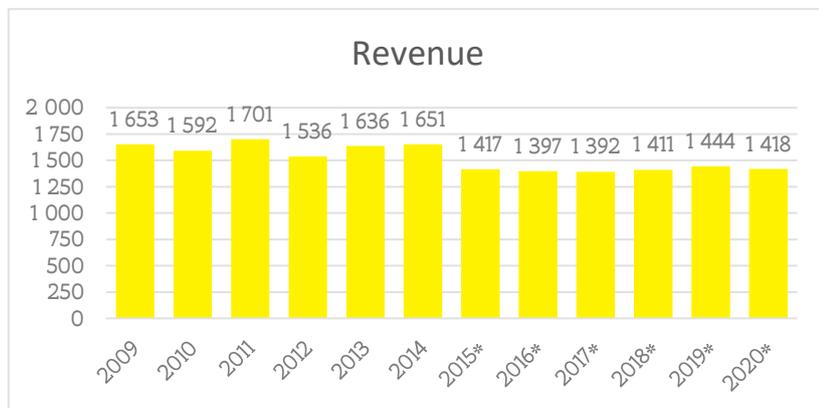


Figure 3 shows the revenue of the Spanish food processing machinery, which has always been quite stable. The stability of this revenue is due to the maturity of this market and to the amount of companies that are active in the food processing machinery sector.⁴ It is expected to remain the same in the future, due to the lack of growth in the sector.

5. IMPORT AND EXPORT

Before going deeper into detail on the import and export of the food processing machinery, an overview of all the Spanish imports and exports is necessary to understand where the figures come from.

In 2017, Spain imported for approximately for 295 billion euro. This represents 2.2% of the total global imports. If you compare 2017 with 2016 there is a growth of more than 10%. The country's most popular imported goods are:

- Vehicles: 13.1%
- Mineral and fuels (including oils): 13%
- Machinery (including food processing machinery): 9.9%
- Electrical Machinery: 7.9%
- Pharmaceuticals: 4.1%

The main import partners are: Germany, France, China, Italy, United States, United Kingdom and Portugal.

Spain exported for 270 billion euro in 2017. This is an increase of 16% compared to 2016. The country's most popular exported goods are:

- Vehicles: 17.2%
- Machinery: 7.6%
- Mineral fuels (including oil): 7%
- Electrical machinery: 5.3%
- Plastics, plastic articles: 3.9%

Spain's main export partners are: France, Germany, Italy, Portugal, United Kingdom, United States, Morocco, China and Turkey.

⁴ Source: <https://www.statista.com/forecasts/396659/spain-food-processing-machinery-manufacture-revenue-forecast-nace-c2893>

Figure 5: Import of Industrial Food Preparation Machinery in Spain - OEC, 2016⁵

Year	Total imports
2010	€ 235,5 M
2011	€ 237,2 M
2012	€ 181 M
2013	€ 217,1 M
2014	€ 241,4 M
2015	€ 230,5 M
2016	€ 280,8 M

According to the Observatory of Economic Complexity, only the import of the industrial food preparation machinery started increasing again in 2012 (figure 5)⁶. This specific part of the food processing machinery industry followed the same trend as the whole food processing machinery industry, so it can be concluded that the whole industry follows the same trend. The last logic conclusion would be that the decrease of imports of industrial food preparation machinery in Spain is the consequence of both theories.

Even though the imports of food preparation machinery have known a lot of fluctuations, half of the imported industrial food preparation machinery has always come from Italy and Germany. The other countries that export their goods to Spain are mostly from the EU (the Netherlands, France, Denmark).

5.2 EXPORT

Spain exports its goods and services to a lot of countries all over the world, but its most important trading partners are European. (France, Portugal, United Kingdom, Germany and Italy). This is because it is still easier to do business in Europe than in the rest of the world due to exchange rates and a lot of trade obstacles. Despite all of this, they recently started trading more with Asian, African and Latin-American countries.

Machinery is one of the main export products of the country. It is a very big sector which can be divided into a lot of sub-sectors. Industrial food preparing machinery is one of them. This includes bakery, pasta making machinery, confectionery, chocolate manufacture and brewery machinery.⁷ According to OEC, the Observatory of Economic Complexity, the share of the industrial food preparation machinery represents 0.74% of all the country's exports. This is quite a lot for a niche market. With this share, Spain provides 2.3% of the global industrial food preparation machinery trade.⁸

⁵ Source: <https://atlas.media.mit.edu/en/visualize/stacked/hs92/import/esp/show/8438/2002.2016/>

⁶ These figures only cover the Industrial Food Preparation Machinery, which contains of bakery, pasta making machinery, confectionery, chocolate manufacture, brewery machinery

⁷ Source: <https://atlas.media.mit.edu/en/profile/hs92/8438/>

⁸ Source: https://atlas.media.mit.edu/en/visualize/tree_map/hs92/import/show/all/8438/2016/

7. LEADING COMPANIES

7.1 FOOD PROCESSING COMPANIES

Company	Website
Alcohol and non-alcoholic beverages	
Estrella Galicia	https://estrellagalicia.es
Estrella Damm	https://www.estrelladamm.com
Félix solís	http://www.felixsolis.com
Grupo el Gaitero	https://www.sidraelgaitero.com
Sant Aniol Mineral Water	http://www.santaniol.com
Sidra Mayador	http://mayador.com
Canned vegetables, prepared dishes and others	
Audens Food	http://www.audensfood.com
Congelados de Navarra	http://www.congeladosnavarra.com/es
GB Foods (Agrolimen)	https://www.thegbfoods.com/es
Grupo Riberebro	http://www.riberebro.com
Helios	https://heliosdistricts.com
Litoral	http://chil.me/spains-food-manufacturers/litoral
Dairy products, nuts and dried fruit	
Almendras Llopis	http://llopis.es
Capsa Food	http://www.capsafood.com/es/
Facundo	http://www.facundo.es/es/
Innolact	http://www.quescrem.es/es/
Mantequerías arias	https://arias.es
Quorum Internacional	http://quoruminter.net
Quesos Corcuera	http://www.corcuera.com
Meat products	
Cinco Jotas	https://www.cincojotas.es
Corporación Alimentaria Guissona	http://www.cag.es
Cogal	http://www.cogal.net
Elpozo	http://www.elpozo.com
Embutidos Goikoa	http://www.goikoa.com
Embutidos la Hoguera	http://lahoguera.es/es
Frimancha	http://www.frimancha.com
Incarlopsa	http://www.incarlopsa.es
Jamones Aljomar	http://www.aljomar.es

7.2 MACHINERY MAUFACTURING COMPANIES

Because of the large range of companies in this sector, a small selection has been made. The complete list of companies can be found at: <http://www.amec.es/>

Company	Website	Sector(s)
Ander Comercial eliseo andujar	www.andher.com	Meat
Amebo Food Machinery	http://www.amebofoodmachinery.com/es	Meat
Astech Food Machinery	http://www.astech.es/es	Fish
Dibal	www.dibal.com	Meat, Poultry, Dairy, Fruit, Canned vegetables
Dinox	www.dinox.es	Meat, Poultry, Dairy, Fruit, Canned vegetables
Fibran	www.fibran.net	General food
Hermasa	http://www.hermasa.com/web/es	Fish
Industries FAC	http://www.industriasfac.com/	Meat
Inoxpa	http://www.inoxpa.com	Dairy
Linco Food Spain	http://www.baader.com/en/baader_group/worldwide/linco_food_systems_spain	Poultry and fish
Mapanva	http://www.mapanva.com	Industrial Bakery
Marel	https://marel.com	poultry, meat and fish
Maquinaria Ferlo	http://ferlo.com	Sweet, chocolates and industrial bakery
Maquinarias Vinas	http://mvinas.com	Sweet, chocolates and industrial bakery
Metalquimia	http://ca.metalquimia.com	Meat
Nc Hyperbaric	https://www.hiperbaric.com/es/	Non-alcoholic beverages, vegetables, fruit, meat, fish, sauces and dairy
Olives and Food Machinery	http://www.ofmsl.com	General food
Sicmatech Food Machinery	http://www.sicmatech.com	General food
Sommetrade	http://ezquerra.com/?lang=es	Canned vegetables, prepared dishes and others
Talsabell	https://talsanet.com	General food
Ulma Packaging	http://www.ulmapackaging.com	Poultry, fruits and vegetables, meat, dairy and fish-seafood
Viscofan	http://www.viscofan.com/Pages/home.aspx	Meat

8.2 ASSOCIATIONS

8.2.1 Amec: Multisectoral association

AMEC

Gran Vía de les Corts Catalanes 684, Pral.

08010 Barcelona

T (+34) 934 150 422

Partners:

<http://www.amec.es/amec-50/>

Members:

http://www.amec.es/?s=+&directorio_sectores=tecnologia-para-la-industria-alimentaria&post_type=directorio

Sectors:

- **AMEC/ALIMENTEC**
Spanish Food Processing Machinery Manufacturers' Association www.amec.es/alimentec
- **AMEC/AEFEMAC**
Spanish Food Processing Machinery Manufacturers' Association
(For the meat industry and related products). www.amec.es/aefemac
- **AMEC/AFESPAN**
Spanish Food Processing Machinery Manufacturers' Association
(For bakery and patisserie products). www.amec.es/afespan

9. CONCLUSION

Spain is a very interesting country to do business in. First of all because the economy is finally getting better again after a relatively long period of the instability. Also, the economic future of the country looks very positive both on short and long term. Because of the constant innovation and development in the food processing (machinery) industry, there are a lot of opportunities in this sector, even though the market is quite saturated.

An opportunity for Flemish companies in the sector is to bring their know-how and engineering skills to the country. In Spain, the food processing machinery manufacturers want to make sure they have the best quality, so it is definitely worth trusting them and working with them. There are a lot of players on this market, bigger ones and smaller ones, who can use a great partner for their machinery.

Furthermore, a lot of the Spanish food processing machinery manufacturers are part of an association, so they can rely on each other. They are not only competitors, they also work together in certain situations.



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