

Catalonia Connects to Food & Drink

Turning a passion for gastronomy into business

One of the biggest food cluster in Europe

Over 2,478 companies in Catalonia constitute one of Europe's largest food clusters. With 19.8% of the industrial turnover, the food & drink sector is Catalonia's most important industry, employing 17.9% of the workforce, and generating a turnover of over €25bn. The Catalan food & drink sector represents 23.7% of the Spanish Food & Drink turnover. With a good combination of SME's and some large Catalan firms and international firms such as Danone, Cargill or Nestlé, Catalonia provides critical mass and talent at all stages of the value chain, as well as cost-effective qualified professionals. We are home to one of the world's most important food & drink trade fairs, Alimentaria, the leading packaging fair Hispack and Bta., the food industry equipment & technology fair.

Dynamic and open to the world

Top exporter: With €8,010m in exports, €5,918m in imports (2016), and a positive trade balance since 2009, the Catalan food industry concentrates 28.5% of Spanish total food exports and is home to 29.8% of the regularly exporting companies of the Spanish food sector. Accounting for almost 40% of the total, meat processing and preserving and meat products are the strongest exporting subsectors, followed by others such as manufacture of vegetables and wine elaboration.

First destination for foreign investment: FDI into Catalonia is 1/3 of the Spanish sector (2009–2015) in terms of projects, capital investment and jobs created. 26 FDI projects were recorded in Catalonia, between January 2009 and October 2015, according to FDI Markets data. These projects represent a total capital investment of €575.11m, and 2,074 jobs created. Manufacturing is the main business activity by capital investment of the food & drink sector, followed by Headquarters, sales, marketing & support. Food & Drink When compared to Western Europe, Catalonia received 3.86% of projects, 3.55% of CAPEX and 4.26% jobs of Food & Drink FDI into this region.

Find the whole value chain in Catalonia

Suppliers - Production	Processing	Distribution - Retail - Services
<ul style="list-style-type: none"> • Balfego • Cadaico • Cooperativa d'Ivars • Girona Fruits • Harinera Vilafranca • Piensos del Segre • Sant Antoni • Torribas • Vall Companys 	<ul style="list-style-type: none"> • Affinity • Agroliment • Bimbo • Borges • Cargill • Càrniques Julià • Casa Tarradellas • Cobega • Codorniu • Costa Brava • Damm • Danone • Europastry • Faccsa • Ferrero • Freixenet • Grup Guissona • Illia • Lactalis • Lipidos Santiga • Nestlé • Patem • Torres 	<ul style="list-style-type: none"> • Areas • BG Logistics • Bonpreu • Cano • Caprabo • Condis • Eatout • Ferrer • Friman • Grup Soteras • Lidl • Maheso • Miquel Alimentació • Nostrum • Sehrs • Serunion • Tae

Number 1 in gastronomy, creativity and innovation

Gastronomy is big in Catalonia with 50 restaurants having Michelin stars, thanks to a dynamic blend of tradition and innovation. Ferran and Albert Adrià, the Roca Brothers or Carme Ruscalleda, to name just a few, put Catalonia on the worldwide culinary map. The **gourmet food** sector is growing rapidly with high gastronomy, organized food service, and local and international consumers searching for unique, quality products. Top research centres such as IRTA, CTNS, Alicia, among others, ensure that Catalonia stays ahead in food innovation.



Barcelona-Catalonia offer a sophisticated market, the whole food and drink value chain, top research centers, talent and know-how for Food & Drink investments projects.

Catalonia is home to food clusters representing the main subsectors and the whole value chain of the food and drink industry:

1. **Meat Cluster** – Innovac: Spain is the fourth world producer of processed pork. Catalonia produces ca 1.6 MT of processed pork per year (44% of Spanish pork production) 71% of Spanish exports are generated in Catalonia.
2. **Wine & Cava Cluster** - Innovi: Catalonia is home to around 10,000 winegrowers and some 600 wine cellars. There are 12 DOs (Guarantee of Origin), producing a varied and versatile range of wines. Torres, Codorniu and Freixenet are major Catalan companies and exporters in the sector.
3. **Compound Feed** – ASFAC: Catalonia produces 4.3% of the EU compound feed production and 20% of Catalan feed production is exported.
4. **Olive Oil, Nuts and Fresh Fruit** are Mediterranean products, traditionally grown, industrialized and exported from Catalonia.
5. **Aquiculture**
6. **Gourmet Products**
7. **Nutrition & Health Cluster** – AINS
8. **Food Packaging & Machinery**
9. **Food Service Cluster** gathers main suppliers, distributors, specialized logistic companies and organized demand such as Areas, Sehrs or The EatOut Group.

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Top in new trends

Functional, organic, allergy-free, healthier foods.

Organic food is an emerging market in Spain and Catalonia. Local initiatives such as the collaboration between the pharma and the food industry in Catalonia, work in the Catalan market's favour Spain, in general, is one of the main exporters in Europe and Catalonia itself has had its own certifying agency, the CCPAE, since 1994. There are 2,724 ecological food production businesses in Catalonia and over 120,000 ha. of land devoted to organic food production. 23% of Catalan **ecological** food sales are exports to the EU. A further 12% is exported to the rest of the World. Catalonia hosts the most developed **allergen-free** market and food industry in Europe.

New Technologies applied to the food industry.

IT is being applied to the Food & Drink sector aimed at simplifying the shopping process, helping diet planning and catering for special needs or sharing economy initiatives. New trends as **virtual shopping walls, mobile in-store check-outs, smart fridges, e-commerce, food apps**, are already a reality in Catalonia. Industry 4.0, 3Dprinting or the additive industry, and IoT are being applied in Catalan industries thanks to the collaboration with our top ICT sector. Top international venues like the **Mobile World Congress** or the **IoT World Congress** have chosen Barcelona thanks to our innovative ecosystem.

Smart logistics.

International food and drink companies are choosing Catalonia for their European Logistics Hubs, thanks to our **strategic location** in the south of Europe, the **Ports of Barcelona and Tarragona**, intermodal infrastructure, Barcelona International Airport, and specialized food & drinks logistics companies.