

FOR A SURE WIN **INVEST IN ANDALUCÍA**



AGRI-FOODSTUFFS INDUSTRY



Junta de Andalucía

Consejería de Transformación Económica,
Industria, Conocimiento y Universidades

AGENCIA DE INNOVACIÓN Y DESARROLLO
DE ANDALUCÍA IDEA

Invest in Andalucía, an initiative supported by the Regional Government, aids foreign companies to establish and expand their business in the region, offering a wide range portfolio of tailor-made services for companies throughout all project phases.

OUR SERVICES



INVESTMENT PLANNING

- ⦿ Accurate information on sectorial regulation, situation of the industry and market.
- ⦿ Search for the best location for each project.
- ⦿ Scheduling personalised visits to locations and meetings with institutions, companies, universities and potential partners.
- ⦿ Information on business opportunities: acquisition of companies and investment opportunities.
- ⦿ Information about grants and financing sources available and applicable to the project.



IMPLEMENTATION AND SOFT-LANDING SERVICES

- ⦿ Information on available workforce, employment and operational costs, intellectual property, taxation and procedures for applications for work and residence permits.
- ⦿ Assistance through national and regional institutions.
- ⦿ Information and follow-up on permits and administrative procedures required to commence professional activities.
- ⦿ Information about potential local providers.



AFTERCARE

- ⦿ Personalised service for multinational established in Andalusia.
- ⦿ Project monitoring.
- ⦿ Elaboration of tailored proposals for parent companies.
- ⦿ Support on potential expansion plans in the region.

Andalusia is a region in Spain integrated into the European Union. Its location, strong economy, population size and infrastructure provide with competitive advantages for investment and entrepreneurial growth.

ANDALUSIA'S ADVANTAGES



LOGISTICAL HUB IN SOUTHERN EUROPE:

- ⦿ Strategic geographical location between Europe and Africa.
- ⦿ Bridge between the Atlantic and the Mediterranean.
- ⦿ Gateway portal between America and Asia.



COMPREHENSIVE AND EFFICIENT LOGISTICAL SYSTEM:

- ⦿ 5 international airports.
- ⦿ Broad high-speed rail network.
- ⦿ Extensive roadway network.
- ⦿ 10 commercial ports.
- ⦿ Algeciras, the main container port in the Mediterranean.
- ⦿ Seville, the only fluvial port in Spain.



NETWORK OF SPECIALIST TECHNOLOGICAL PARKS THAT BOOST R&D+I ACTIVITIES:

- ⦿ The greatest workforce offer in Spain.
- ⦿ Highly competitive employment costs.
- ⦿ Productivity rates above the average in the European Union.
- ⦿ Fiscal advantages for the establishment of new companies and exports in the Free Trade Areas of the South of Spain: Cadiz and Seville.
- ⦿ High-intensity in terms of subsidies, access to funding and other fiscal incentives for investment, expansion and innovation.
- ⦿ World-renowned quality of life.

2ND LARGEST
REGION IN
SPAIN:
87.597 KM²

A LARGE
MARKET:
500,000
COMPANIES

MOST
POPULATED
REGION IN SPAIN
8.4M
INHABITANTS

+ 1.400
FOREIGN
COMPANIES WITH
PRESENCE IN
THE REGION

GDP
€160M

ANDALUSIA, THE AGRO-INDUSTRY AT THE HEART OF ITS ECONOMY

Agri-foodstuffs is the main industrial sector in Andalusia.

The Andalusian community is the world's leading producer of olive oil.

It is the unrivalled national leader in terms of organic production.

It is the first ranked community in production and export of fruits and vegetables, providing a third of the national volume.

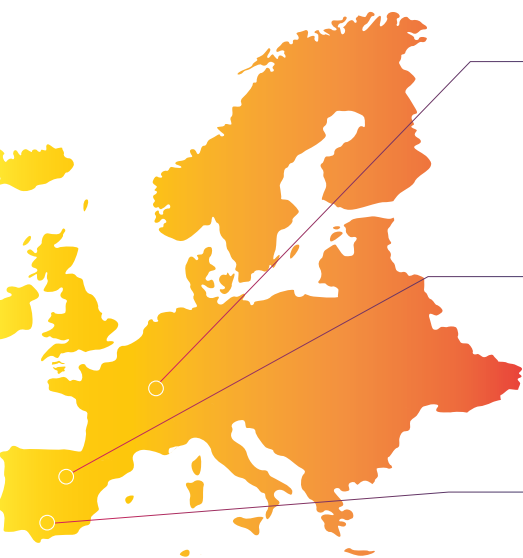
It is the Spanish community that exports the most foodstuffs and beverages.

It moves, in total, 22% of national sales abroad.

The main competitive advantage of Andalusian agro-industry is the strength of the primary sector in the region.

- Andalusia spearheads the production under cover of plastic, with its intensive agriculture greenhouses.
- It is a European benchmark in the production of tropical fruits, highly profitable products.
- Andalusia provides more than 90% of the national production of red berries, from which the main Central European markets are supplied.
- First ranked national and European rice producer.
- European Union leader in cotton crops

Livestock and fishing are also sectors of great value for the region with major weighting within the processing industry.



EU
508.2 MILLION
CONSUMERS

SPAIN
46.5 MILLION
CONSUMERS

ANDALUSIA
8.4 MILLION
CONSUMERS



6.000
COMPANIES



68.000
DIRECT
JOBS



+17.000B€
BUSINESS
VOLUME



34.210
EXPLOTACIONES DE
GANADERÍA EXTENSIVA



1.442 BARCOS
EL 16% DE LA
FLOTA NACIONAL

**A POWERFUL
INTERNAL MARKET**



3M
HOUSEHOLDS



32M
TOURISTS A
YEAR



+110.000
HOSPITALITY AND
RESTORATION
ESTABLISHMENTS

THE ANDALUSIAN AGRI-FOODSTUFFS SECTOR AT A GLANCE



- **Invoicing:** Second ranked Spanish community in turnover.

With 16.89 billion euros, it concentrates 15.2% of Spain's turnover in this area.

- Foodstuffs: 14.3 billion euros
- Beverages: 2.59 billion euros

- **Occupation:** Second rank nationally in job creation in foodstuffs and beverages production.

Its 67,288 direct jobs account for 13.3% of the occupation of this industrial sector in Spain.

- Foodstuffs: 58,390 jobs
- Beverages: 8,898 jobs

- **Productive fabric:**

Andalusia's 5,935 agri-foodstuff companies comprise 19.3% of the sector in Spain.

- **Exports:** Andalusia is the Spanish community that exports the most in the agri-foodstuff industry.

The 11.118 BN€ exported by the sector in 2019 represent 22.3% of the Spanish foreign market share.

The Andalusian agri-foodstuff sector boasts 3,638 exporting companies. 1,736 of these are regular exporters, that is, they have exported for at least the previous four years.

15.2%
OF SPAIN'S
TURNOVER

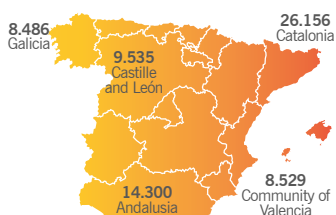
13.3% OF THE
OCCUPATION

19.3% OF THE
SECTOR IN
SPAIN

22.3% OF THE
SPANISH
FOREIGN
MARKET

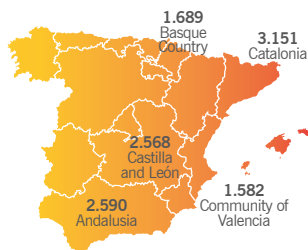


COMMUNITIES WITH HIGHEST TURNOVER IN THE FOOD INDUSTRY



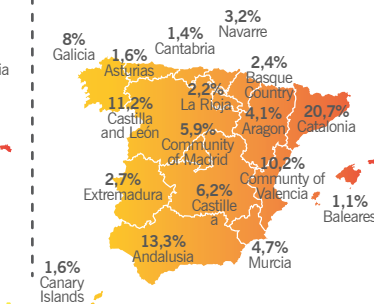
Source: INE Structural Statistics of Companies, 2017

COMMUNITIES WITH HIGHEST TURNOVER IN THE BEVERAGE INDUSTRY



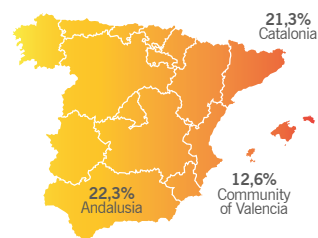
Source: INE Structural Statistics of Companies, 2017

EMPLOYMENT IN THE FOODSTUFFS AND BEVERAGES INDUSTRY BY COMMUNITIES



Source: Economic Report 2019 of the Spanish Federation of the Foodstuffs and beverage Industry

COMMUNITIES WITH THE GREATEST SHARE IN THE EXPORT OF FOODSTUFFS AND BEVERAGES



(Source: Andalusian Agency for Foreign Promotion EXTENDA, 2019)

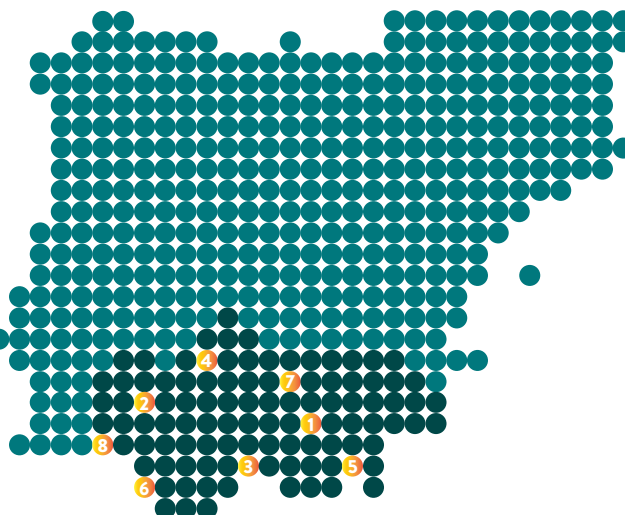
AGRI-FOODSTUFFS SECTOR

1 GRANADA
 Granada Health Technology Park (PTS)
 Centre for Research and Development of Functional Food (CIDAF)
 Zaidín Experimental Station
 IFAPA Camino de Purchil Centre

2 SEVILLE
 Cartuja Science and Technology Park (Seville)
 The Fat Institute (CSIC)
 Institute of Natural Resources and Agrobiology of Seville (IRNAS)
 IFAPA Las Torres Centre

3 MALAGA
 Andalusia Technology Park (PTA) of Malaga
 Subtropical and Mediterranean Hortofruticulture Institute La Mayora (IHSM)
 IFAPA Malaga Centre

8 HUELVA
 Agro-industry Technology Centre ADESVA
 IFAPA Huelva Centre
 IFAPA Agua del Pino Centre

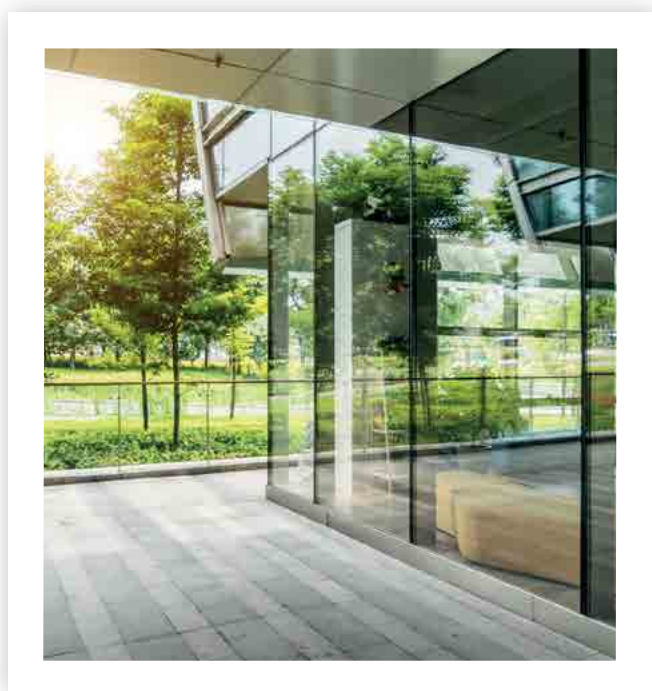


7 JAEN
 Geolit. Jaen Scientific and Technological Park
 Olive and Oil Technological Centre (CITOLIVA)
 IFAPA Venta del Llano Centre

6 CADIZ
 Aquaculture Technology Center (CTAQUA)
 Andalusian Centre for Wine Research
 IFAPA Sanlúcar de Barrameda Centre
 IFAPA El Toruño Centre
 IFAPA Rancho de la Merced Centre

4 CORDOBA
 Rabanales 21. Cordoba Scientific and Technological Park
 Institute of Sustainable Agriculture (IAS), Cordoba
 Foundation Centre for Agri-foodstuffs Research and Quality of Valle de los Pedroches (CICAP)
 IFAPA Hinojosa del Río Centre
 IFAPA Palma del Río Centre
 IFAPA Alameda del Obispo Centre
 IFAPA Cabra Centre

5 ALMERIA
 Science and Technology Park of Almería (PITA)
 Cajamar Experimental Station
 Tecnova Foundation
 Association of Fruit and Vegetable Organisations of Almería (COEXPHAL)
 IFAPA Nautical Fishing Centre of Almería
 IFAPA La Mojonera Centre



Andalusia has opted for the diversification and specialisation of its parks and research centres.

It boasts infrastructures of excellence matching the highest international standards.

Administration, Universities and the main companies in the agri-foodstuffs sector work in tandem on joint projects of the parks and technological centers of Andalusia.

Their research generates knowledge and technical innovations that are then transferred to the industry.

Biotechnology companies play an important role in this, which have generated an increasingly grounded network in the community to support the foodstuffs and nutrition industry.

A POWERFUL BUSINESS ECOSYSTEM

In Andalusia, local companies that are leaders in their activity coexist with some of the main multinationals in the food and beverage sector, which have chosen the region to set up their production centres.





















Some leading companies in the sector in Andalusia are Aceites del Sur, AB-Mauri, Ángel Camacho, Bimbo, Covap, Daregal, Lanjarón Aguas, Danone, Ebro Foods, Inés Rosales, Lactalis, Migasa, Heineken, Sovena, Suntory, Usisa and Ubago .

MAJOR FOODSTUFFS AND BEVERAGE COMPANIES IN TERMS OF INVOICING IN ANDALUSIA 2019

1. MIGASA. Miguel Gallardo, SA. 1.035 billion euros
2. DCOOP. 1.008 billion euros
3. HEINEKEN ESPAÑA, SA. 957 million euros
4. LACTALIS PULEVA, SL. 643 million euros
5. ACESUR. 602 million euros
6. DEÓLEO, SA. 561 million euros
7. COCA COLA EUROPEAN PARTNERS IBERIA. 554 million euros
8. SOVENA ESPAÑA, SAU. 537 million euros
9. COVAP, SCA. 476 million euros
10. UNICA FRESH. 338 million euros
11. GRUPO OSBORNE. 376 million euros
12. PERNOD RICARD ESPAÑA, SA. 358 million euros
13. GROUP AGROPONIENTE. 393 million euros
14. GRUPO AMASUA. 330 million euros
15. GRUPO AVISERRANO. 319 million euros
16. GRUPO PASTAS GALLO. 313 million euros
17. PROAVI, SL. 309 million euros
18. GONZÁLEZ BYASS. 309 million euros
19. CASH LEPE, SA. 296 million euros
20. ALHÓNDIGA LA UNIÓN, SA. 295 million euros

Source: Ranking of the 1,200 Largest Companies in Andalusia, Andalucía Económica magazine, 2020

DISTRIBUTION OF THE ANDALUSIAN AGRO-INDUSTRY COMPANIES

-  Aquaculture, shellfish and fisheries 264
-  Use of textile fibres: 12
-  Manufacture of food preparations, condiments, spices and similar: 96
-  Winemaking, alcohols and alcoholic beverages: 600
-  Egg and egg-based products: 74
-  Vegetable oil and fat industries: 1,080
-  Meat industries: 809
-  Sugar, honey and wax industries: 73
-  Canned vegetables, dressings and fillings industries: 360
-  Fruits, fresh vegetables, flowers and ornamental plants: 796
-  Handling and preservation industries: 716
-  Milling industry, flour and derivatives, chopping and de-shelling: 66
-  Fruit and vegetable juices, water and other agri-foodstuff beverages: 52
-  Bread, confectionary and snacks: 327
-  Forest industries: 41
-  Dairy Industries: 156
-  Feed, grains and seeds: 386
-  Technical services: 12
- No division assigned: 15

TOTAL: 5,935 companies

Source: Andalusian Institute of Statistics and Cartography 2018



Junta de Andalucía

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 +34 955 03 07 75

 inversiones@agenciaidea.es