



# The Food Industry in Barcelona



Ajuntament de Barcelona



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01

# Barcelona, the Mediterranean's innovation hub



**Barcelona**, located in north-eastern Spain and on the shores of the Mediterranean, is one of the principal European cities and the centre of a vast metropolitan region of more than 160 towns, and with a population of more than 5 million people. It is the economic, cultural and administrative capital of Catalonia and the centre of an emerging area of economic activity in Southern Europe, with 17 million people and 800,000 businesses. The Euro-Mediterranean region, including the Balearic Islands, Valencia, Aragon and the south-east of France, is positioning itself in new strategic and internationally-competitive sectors, consolidating itself internationally as a major European metropolis.

With a long industrial tradition and a dense business fabric, Barcelona has a **highly diversified economic structure**. Its more traditional sectors coexist with new emerging ones, creating new clusters of knowledge that prioritise specialisation and competitiveness, focusing on internationalisation and creating a dynamic and innovative

city economy. This has helped to drive Barcelona's strategic leadership in these fields. In 2010, Catalonia was home to more than 3,400 international firms in several sectors and received **36% of all annual foreign investment in Spain**, 90% of this concentrated in the Barcelona area.

Taking into account the distribution of gross value added across business activities, Catalonia is Spain's top autonomous region in the industrial sector, accounting for 25.2% of the total market. In terms of services, it is positioned second regarding national gross value added generated. Catalonia accounts for 28.2% of all Spain's companies in industries with high and medium high-tech and knowledge-based services.

Additionally, Barcelona's entrepreneurial activity rate in 2010 was 5.5%, above both the Spanish and European averages according to the Global Entrepreneurship Monitor (GEM) 2010.

Barcelona's international economic activities are mainly driven by the

Trade Fair, the Port, Airport, the Zona Franca Consortium, Barcelona's Tourism Consortium, Barcelona City Council and its new technological innovation districts. As such, and given the importance of innovation in fostering competitiveness, productivity and the internationalisation of companies, the Food Industry is one of the key sectors for Barcelona and Catalonia.

Barcelona and Catalonia have positioned themselves as leaders in the food industry, and now bring together the largest number of top foodstuff companies and the largest production volume in Spain. This area is also especially significant because of its many facilities, universities and technology centres that support research and innovation activities in this area, as well as hosting the second largest foodstuff fair in the world.

Barcelona and Catalonia boast a rich food and cuisine culture, internationally recognised in terms of its eateries, with the Mediterranean Diet as a key driver.

02

# 10 reasons to invest in Barcelona

Barcelona offers a number of different elements that make it an attractive place to live, work and do business. Today the city is a highly interesting location for new economic activities. Some good reasons to invest here are as follows

## 01. Strategic geographic location

Two hours by road from France and one day from the main European cities. The gateway to Southern Europe and capital of the Union for the Mediterranean, Barcelona's port, airport, logistics parks, international trade fairs and city center are found within a five-kilometer radius.

## 02. Comprehensive transport infrastructure

A network of motorways connected to Europe; the fastest growing airport in Europe; the top Spanish port and largest container port in the Mediterranean; wide reaching underground, train and bus networks; high-speed train connections to the European rail network as of 2013.

## 03. Center of a large, dynamic and diverse economic area

The Barcelona area has nearly 5 million inhabitants. It is the capital of Catalonia, with 7.5 million inhabitants, and the center of the Mediterranean Basin, an economic area with 18 million inhabitants. It accounts for 70% of Catalonia's GDP, and is the sixth largest urban area in Europe and has the fifth highest concentration in Europe in terms of industry. Catalonia has nearly 7,000 businesses working in innovation related activities, most of which are located in Barcelona and its surrounding area.

## 04. Successful foreign investment

Barcelona is ranked the sixth best city in Europe for business\*, and Catalonia accounts for approximately 36% of all foreign investment in Spain and is home to more than 3,400 foreign companies, 90% of whom are located in the Barcelona area.

## 05. Internationally renowned positioning

Barcelona tops a number of international rankings, which rate its urban environment, ability to attract foreign capital, entrepreneurial spirit and quality of life very highly.

\*According to Cushman & Wakefield, European Cities Monitor 2011.

## 06. Human resources prepared for the future

Barcelona now has one of the leading labour markets in Europe in terms of critical mass in high value-added sectors; highly productive, one of the best in Europe according to the OECD; 8 public and private universities; a number of prestigious business schools including ESADE, IESE and EADA; 34 international schools; widespread use of new technology and a natural tendency for innovation and creativity.

## 07. Excellent quality of life

For the 14th year running, Barcelona boasts Europe's best quality of life for employees\*. It has a mild climate, sun, beaches, culture, splendid leisure time and arts programmes, a network of 4,500 educational institutions, modern and accessible health system. It is easy to get around on the public transport system and boasts beautiful parks that surround the city.

## 08. Large-scale urban-planning projects for the future

Transformation of 1,000 ha and 7 million m<sup>2</sup> of floor space in the metropolitan area of Barcelona.

Llobregat Area: commitment to logistics, aerospace and mobility, with expansion of the port and airport.

Besòs Area: urban renewal, universities and research and innovation centers; Porta Europa-La Sagrera: arrival of the high-speed train; 22@Barcelona: the new technology and innovation district, and the Diagonal-Besòs Campus for activities related to energy, water and sustainable mobility.

Vallès Area: strategic concentration of technology, nanotechnology and research facilities; the Alba Synchrotron, the Vallès Technology Park and the UAB Research Park.

## 09. Competitive real estate market

Wide range of offices, retail spaces and industrial warehouses with excellent price/quality balance and a high occupation rate.

## 10. Unique public/private cooperation

Barcelona City Council and the Catalan Government are highly committed to companies; the success of traditional public/private collaboration has been key to Barcelona's transformation.



03

# The Foodstuff Industry in Barcelona and Catalonia



**The Catalan foodstuff industry leads the Spanish market, and Barcelona plays a crucial role in this positioning, accounting for a large volume of the total production and most of the research, innovation and foreign investment generated in the sector. Catalonia is Spain's top autonomous region in terms of its foodstuff sector, representing 23% of total net sales, and a similar percentage of operating incomes.**

As well, Catalonia boasts a rich food and gastronomy culture, especially thanks to consumption habits based on the Mediterranean Diet, quality shopping opportunities and internationally renowned restaurants.

In recent years, Catalonia and the metropolitan area of Barcelona have positioned themselves as a benchmark region regarding the food and beverage industry and the agro-foods business. The food industry plays an essential role in the Spanish economic system, and is one of the most important industrial sectors.

To put the importance of the food sector in the Catalan economy in context, the foodstuff, beverages and tobacco industry is the principal business sector in terms of turnover

with 17.9% of the total; there are nearly 3,600 companies, many of them in the Barcelona metropolitan area. Between them they generate 78,500 direct jobs, and in 2008 they accounted for 20.5% of all employment in the Spanish foodstuff industry.

Additionally, Barcelona's weight and prowess in the foodstuff world is reflected by its distribution facilities, with, for example, Mercabarna supplying produce and products to a catchment area of more than 10 million people, stretching from the north east of Spain to the north of Italy. Barcelona is the host city for the Alimentaria trade fair show, the second largest in Europe, and finally it has a large number of universities and research centers working in the fields of nutrition and food safety.

It's also worth noting the importance of consumption and particularly gastronomy, with Barcelona, Catalonia and Spain having become international benchmarks. The Mediterranean Diet has been a significant driver in this process, having now become a steering force and benchmark across a wide range of eateries present in the area. But, so too is the rich culinary tradition and consolidated prestige of Catalan chefs, which has made Barcelona one of the great capitals for quality and creative gastronomy.

This document aims to set out the underlying features of the current and future agro-foodstuff sector in Catalonia and Barcelona under **10 strategic reasons**:

- 01** An important Foodstuff Industry
- 02** European benchmark cluster
- 03** Privileged geostrategic position
- 04** Presence of leading companies
- 05** Leadership in fresh produce
- 06** Barcelona Food Platform
- 07** Strategic commitment to research and development
- 08** Alimentaria, the second most important international food fair
- 09** Barcelona's Municipal Markets, the largest network of food markets in Europe
- 10** Barcelona and the Mediterranean Diet



# 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia



## 01.

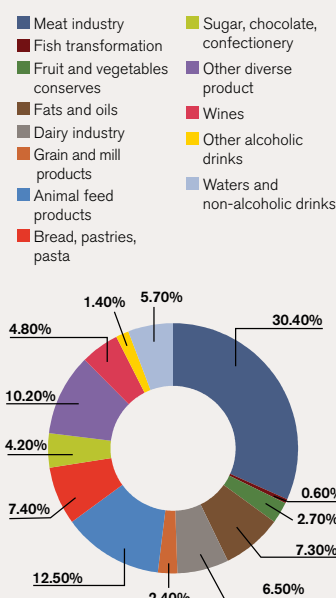
### AN IMPORTANT FOODSTUFF INDUSTRY

**Catalonia has a long tradition in the food sector, reflected by the importance of this sector's economic activity in the overall industrial makeup, and which has become one of the main drivers of the Catalan economy.**

The weight of the food industry regarding overall net sales made by Catalonia's industry is 17.8%. This is almost the same figure as the chemical or pharmaceutical sectors, with a turnover of 20.055 billion Euro in 2008, the same year that Catalonia registered the highest employment in this sector in Spain, with 78,500 workers or 20.5% of all Spain's agricultural sector.



**Distribution of product sales in the food industry in Catalonia. Year 2008 (%)**



**Distribution of jobs across the food industry in Catalonia. Year 2008 (%)**



Barcelona's metropolitan area constitutes a first class foodstuff cluster offering those companies that locate here a wide range of opportunities to identify and adapt to industry trends.

#### Laboratory of ideas and identification of new trends

Barcelona has become a key location to discover new purchasing and consumption habits, and identify new

emerging trends in the food sector. Additionally, with important trade fairs and cultural activities related to the foodstuff industry taking place here, like the Alimentaria trade fair, Barcelona has turned itself into a centre for the generation and detection of new opportunities in the sector, and a laboratory of continuous ideas.

As such, Barcelona allows companies to identify opportunities, develop and test their innovations all in the same setting, especially regarding:

- New consumer habits and the identification of new consumer segments
- New shopping patterns
- The launch and analysis of new products, such as organic, functional foods
- Adaptation to new marketing channels such as the hotel and catering channel.

#### Key setting for the development of innovation and research

Catalonia has a wide network of institutions and organizations pioneering R&D to help companies develop new products and services (IRTA, research groups based out of

public universities, etc...). These allow for and provide a first rate space to share knowledge about innovation.

- Product innovation, especially in the development of the 4<sup>th</sup> and 5<sup>th</sup> ranges
- Innovation in production processes, especially in processing techniques, and the elaboration and conservation of products
- Adapting to distribution logistics trends and related technologies such as smart packaging
- Technology innovation
- The inclusion of innovation in environmental issues and waste management.

In the Barcelona metropolitan area there are also significant clusters that can provide synergies and complement the Foodstuff Industry, such as the ICT or biotech sector.

We should also highlight Barcelona's strategic location and its proximity to major logistics facilities, which gives it a significant international slant. Thus, Catalonia, and especially the metropolitan area of Barcelona have become an important catalyst and generator of business opportunities and the development of R&D in the foodstuff sector.

## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia

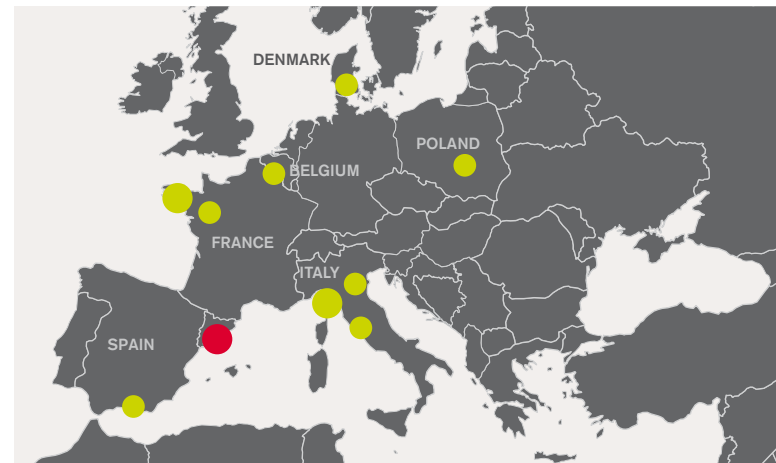
## 02. EUROPEAN BENCHMARK CLUSTER

The regional food sector in the Barcelona area has become a benchmark at the European and international level, having become:

- A first-rate foodstuff cluster
- A centre of attraction for international companies

### Foodstuff Clusters (Europe's top 10 ranking)

1. Lombardy (Milan), IT
2. Catalonia (Barcelona), ES
3. Denmark, DK
4. Brittany (Rennes), FR
5. Vlaams Gewest, BE
6. Emilia-Romagna (Bologna), IT
7. Veneto (Venice), IT
8. Pays de la Loire (Nantes), FR
9. Mazowieckie (Warsaw), PL
10. Andalusia (Seville), ES



The foodstuff cluster in Catalonia holds a leading position in Europe, according to data from the European Cluster Observatory presented by the Stockholm School of Economics, which analysed more than 250 European regions.

Catalonia has become, along with the Italian region of Lombardy, one of the major foodstuff clusters in Europe in terms of number of jobs generated and size, compared to the 150 foodstuff clusters considered.

Regarding Spain, the food cluster in the Barcelona area is the leader because it generates more jobs and occupies more space than any other cluster except the construction industry.

### High attraction value for foreign investment

As well, the greater Barcelona area has become a magnet for foreign investment, especially in industry and advanced services. Catalonia has become the top destination of foreign companies. In 2010, Catalonia was home to more than 3,400 international firms and received 36% of all annual foreign investment in Spain, 90% of this concentrated in the Barcelona area. It is worth noting that nearly 97% of these show high levels of satisfaction with their location decision.

In the context of foodstuff, the dynamic nature and overall attractiveness of this region is reflected by the fact that 11% of foreign investment in Catalonia is in this sector, just behind the automotive sector, which boasts 13% of all investment.



## 03. PRIVILEGED GEOSTRATEGIC POSITION

Barcelona enjoys a privileged geographical location given that the highly concentrated nature of its size - just 5 km in radius - and where a variety of transport modes coincide (sea, air, rail and road), combined with the facilities and land required for the development of quality large logistics facilities.

Especially important is the Llobregat Delta platform, whose facilities have made it a top foodstuff cluster. These assets are characterized by the following infrastructure:

- The **Zona Franca industrial zone**, which is the largest and most active industrial area in Spain. It has a gross area of 600 hectares with more than 200 companies set up there and with an economic activity generating 20 billion euros (2006).
- **Mercabarna**, the leading foodstuff cluster in the southwest of Europe.
- **Barcelona Airport**.
- The **Port of Barcelona** and **ZAL**, which has more than 830 ha dedicated to the foodstuff sector, with 6 specific terminals. Freight traffic (imports/exports) is around 7.4 million tonnes a year.

Finally, Catalonia has large foodstuff warehousing facilities, currently around 1.5 million m<sup>2</sup>, of which some 60% is located in the province of Barcelona and which includes a wide range of cooled logistics facilities.



## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia

# 04.

## PRESENCE OF LEADING COMPANIES

Catalonia is a benchmark in the industrial foodstuff sector, both because of the presence of outstanding and sector-leading international companies -especially in the Barcelona area-, and because of the presence of six benchmark clusters. In parallel, complementary industries, like those related to containers and packaging, logistics, cold storage, etc... have been developed.

The quantity of foodstuff companies in Catalonia is very high and brings together nearly 3,000 firms. Nationally, Catalonia heads the ranking with respect to large companies, with almost 700. Most of this employment-generating industry is in the province of Barcelona, which has become a strategic area for any major food company.

For example, in Catalonia and especially in the Barcelona metropolitan area can be found leading foodstuff companies with a significant presence of leading international companies in their respective sectors.

Some of the most noteworthy include Nestlé, Danone, Agroalimen, Panrico, Borges, Bimbo, Coca-Cola, Damm, Freixenet, Codorniu, Cargill Spain, Corporación Alimentaria de Guissona or Bacardi, to name but a few.

At the same time, this major concentration of businesses has generated high levels of specialization and professional qualifications, and provides top quality human capital and knowledge.

The main association of manufacturers and distributors (AECOC), with nearly 24,000 members, has its headquarters in Barcelona. AECOC, which was founded to promote the use of bar codes, has evolved to provide the distribution industry with the sort of collaboration network needed to reach consumers as efficiently as possible, whilst also identifying opportunities for improvements along the entire production chain. AECOC is also a member and representative of the GS1 organization in Spain, whose objective is to define standards and best practices in supply chain management.

In 2009 the **Foodstuff Cluster Association** was set up with Mercabarna, 22@Barcelona, The Consortium of the Zona Franca Barcelona, the Car Dealership Association of Mercabarna (Assocome) as founding members.

The Association's aim is to help improve the competitiveness of its companies and ensure their growth, promoting companies' strategic innovation in order to adapt to changes in the sector. As such, within the association they are developing projects in areas of Food Service, wholesale and retail.



### Six outstanding foodstuff clusters (Catalonia)

- **Meat Industries:** This cluster is made up of over 200 companies with 8,300 employees.
- **Aquaculture:** Fifty companies compose this sector's value chain with a turnover of 400 million Euros.
- **Wines and cavas:** This cluster brings together more than 200 companies employing 2,500 workers and a turnover of 575 million euros.
- **Foodstuff packaging and machinery:** There are 300 companies in this sector with a total turnover of around 2.6 billion Euros, making it the second largest in Europe, together with the Øresund region (Denmark and Sweden).
- **Foodservice:** With 150 companies dedicated exclusively to this sector and over 300 others with significant business activity dedicated to this area, the estimated turnover of companies in this industry is more than 4.3 billion euros.
- **Catalonia Gourmet:** made up by 21 companies, this cluster's main objective is to promote and contribute to the competitiveness of the Catalan gourmet food stuff sector.



## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia



## 05. LEADERSHIP IN FRESH PRODUCE



**Mercabarna is a first rate Food Unit, having become one of the major fresh produce foodstuff clusters in the southwest of Europe, offering marketing activities, the development of added value for foodstuff, logistics, distribution, import and export, and the incorporation of technology facilities and services, waste management and environmentally friendly policies.**

**Mercabarna** (Mercados de Abastecimientos de Barcelona, SA) manages the Food Unit, which brings together the city's wholesale markets (Central Market of Fruits and Vegetables, Central Fish Market and Slaughterhouse), as well as the many firms making, selling, distributing, importing and exporting fresh and frozen products, providing value added products and customer service, and which are located in the Complementary Activities Zone (ZAC).

Mercabarna also has a plot of 4.5 hectares next to Barcelona Airport, where it has built **Mercabarna Flower**, a new business centre that specializes in wholesale flowers, plants and accessories.

- **Location:** Barcelona's Zona Franca
- **Area:** 90 hectares
- **Number of companies:** 700
- **People who access the zone every day:** 25,000
- **Number of employees:** 8,000
- **Annual Turnover:** 3 billion euros

Mercabarna products are sent to Spain and reach many countries around the world, but its immediate sphere of influence covers the whole of Catalonia, north Valencia, the strip along south Aragon, the Balearic Islands, Andorra, the south of France and northern Italy. In total, Mercabarna supplies fresh produce to around 10 million consumers.

Mercabarna is strategically located at the heart of the main logistics area of the country, where we find

the principal transport infrastructure (ports, airports, terminal Tir, Nus del Llobregat, freight train station, etc.). This is just 10 km from the centre of Barcelona. The quality of fresh products decreases significantly over time, so logistics advantages and good transport are essential, especially since transport origins and destinations are increasingly remote.

The promotion and development of the **Complementary Activities Zone (ZAC)** around the wholesale markets has been crucial for the evolution of Mercabarna and this is what differentiates this important foodstuff park from other markets in the world. In this area value-added activities have been promoted to product and customer services to meet the current needs of commerce and consumers. ZAC activities include: companies

involved with the preparation of fresh produce (cleaning, handling, packaging, etc.), seafood nurseries; banana maturers; potato dealers (importing, cleaning, sorting, packing); importers and exporters from all over the world, modern fruit chain processors, companies supplying the restaurant trade; large distribution companies' purchasing platforms, cooking units for catering companies, large refrigerators for public use, etc..

As such, value added activities are becoming more and more important (preparation and packaging of products). This was something that started in the meat companies, but that has now spread to fruit and vegetables dealers and, more recently, fishmongers.

This diversification of activities –mainly driven by large retailers–,

is also very good for the hotel and restaurant sector.

In addition, some of these companies have also committed to developing products for what is known as the fifth range (pre-cooked meals), directed mainly at hospitality and catering channels. This is still very much a new business area and therefore it's difficult to assess the results to date.

Mercabarna also forms part of the **Mercasa** markets network, a set of 23 wholesale markets across Spain whose total surface area covers more than 7 million m<sup>2</sup> with more than 3,500 wholesalers.



## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia



## 06. BARCELONA FOOD PLATFORM

Since 1916, the Zona Franca Consortium (CZF) has been managing what is one of Spain's main industrial zones and Catalonia's principal industrial park -incidentally going by the same name as the consortium itself. In this area, CZF has a 44-hectare zone classified as urban 22AL, which means it is being given over to activities related to the food industry. Recently, CZF has recovered an area of 50 hectares (the former SEAT factory) to promote as a new business venture zone project called Enterprise Platform BZi and 17 hectares of this land will be made over to the new food axis alone.

This new area is being used by Mercabarna and CZF to develop the so-called Barcelona Food Platform, an idea aimed at getting technology and knowledge-led food companies to set up in this part of the industrial zone (a 160 hectares area that includes spaces developed by Mercabarna, BZi and 22AL) which aims to characterise the technological changes that the food sector needs to make.

As such, both Mercabarna and CZF share the same policy measures regarding driving the food sector to reach new objectives in terms of their approaches to strategy, tactics and operations. This frame, which is a joint and coordinated Mercabarna-CZF strategy, has to aim at providing a better service and to clarifying the forecasts of future growth and the consolidation of the whole food industry and those companies that operate in it. Additionally, it has to raise the national and international impact of the Barcelona Zona Franca food centre in order to make it a benchmark -without it prejudicing the legitimate interests and objectives of the respective entities-, in order to achieve the following specific objectives:

1. The growth and consolidation of food-related activities in the Zona Franca area, making this a central foodstuff business area that has a national and international benchmark projection and which boasts significant components of innovation and value-added.
2. The complementary nature of measures taken by Mercabarna and CZF, that avoid duplication and competition, and that facilitate the creation of synergies and the sorts of economies of scale that come from the combined actions of these stakeholders.
3. The encouragement and promotion of innovative measures, processes and the distribution of fresh produce to the entire foodstuff area affected.
4. The promotion of best-practices services to companies in the foodstuff area by both organizations.
5. The promotion of technical, business and financial assistance by both entities to foodstuffs-related business operators -and also between the entities themselves-, to achieve common goals that best meet the needs of the industry and businesses.

## 07. A STRATEGIC COMMITMENT TO RESEARCH AND DEVELOPMENT

Catalonia, and in particular the metropolitan area, has highly-significant facilities, platforms and universities engaged in research, development and innovation in the food sector, and this has helped it to get the most of the sectors' extensive industry knowledge to provide service companies with the sort of R&D&i needed to increase products' added value, incorporating new technologies and innovation.

Catalonia, and the Barcelona area in particular, offer a wide range of research centres and investigation groups linked to the foodstuff world that has helped to create a body of businesses with a vocation for innovation, and that provide research and development services that companies need.



### Leading research centres:

- Analysis of Innovative Technology for Competitive Industrial Processes (ATIPIIC)
- Research Centre for Agricultural Economics and Development (CREDA)
- Centre for Research in Toxicology (CERETOX)
- Nutrition and Health Technology Centre (CTNS)
- Centre for biotechnological and agrifood developments (DBA)
- Research Centre for Animal Health (CRSA)
- Spanish National Research Council (CSIC)
- Catalan Institute of Vines and Wine (INCAVI)
- Institute for Research and Technology (CSIC-IRTA consortium)
- Bakery Sector's Center for Technology Promotion (INNOPAN)

- Centre for Nutrition and Aging (NUTREN-nutrigenomics)
- Triptolemos Foundation
- Food and Science Foundation (ALICIA)
- Combinatorial Chemistry Unit (UQC)

### The main universities in the country boast research groups related to the agro-food sector, which carry out fundamental, basic, and applied research

- Autonomous University of Barcelona
- University of Barcelona
- University of Girona
- University of Lleida
- Polytechnic University of Catalonia
- University of Rovira i Virgili



## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia

# 08.

## ALIMENTARIA, THE SECOND MOST IMPORTANT INTERNATIONAL FOOD FAIR

**Alimentaria is Spain's most important international food and beverage trade fair and one of top events in the world. The fair, which is held for 18 by-annual events, is a true meeting point for international food manufacturing and distribution, and some of the industry's principal innovations have been presented here.**



With an increase of 60% in the number of participating countries over the last 12 years, some 4,000 leading companies in the manufacture and distribution of food and beverages from over 75 countries come together for this event every two years for what is an international benchmark event year after year. The number of visitors during the last edition was 140,000, with 25% of these coming from 155 foreign countries. The event has become an international business centre and a bridge between Europe, Africa and Latin America, a fact that is now one of the core values of international fairs held in Barcelona.

From this leading and privileged position, and backed up by its past results and guided by the core values of innovation, professionalism, internationalization and parallel dynamic activities to the main exhibition,

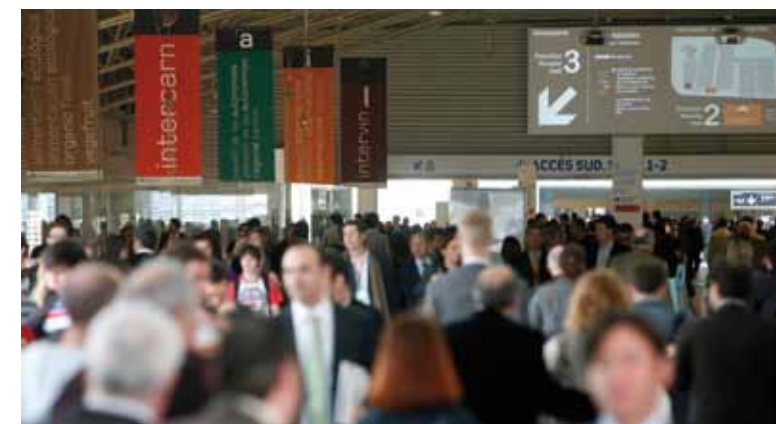
Alimentaria enjoys undisputed recognition and credibility. So much so that its trade show model has been exported to other cities such as Lisbon (Alimentaria & Horexpo-Lisbon) and Mexico D.F. (Alimentaria Mexico), and very soon it will take place in other cities, too.

The fair generated a turnover for participating companies of more than 1.8 billion euros, with the city itself benefiting from fair-related supplementary incomes worth 168 million.

The impact of the fair is not only quantitative, but also very qualitative, reflected by the many parallel activities held, too. All of these are linked to research, development and foodstuff innovation, knowledge creation, nutrition, health, welfare, sustainability, the Mediterranean Diet, new ways to communicate, retail, and avant-garde cuisine.



	2004	2006	2008	2010
Total Surface Area	105,815m <sup>2</sup>	115,000m <sup>2</sup>	108,714m <sup>2</sup>	85,122m <sup>2</sup>
Workshops and Activities	6,000m <sup>2</sup>	7,000m <sup>2</sup>	9,000m <sup>2</sup>	9,500m <sup>2</sup>
Number of Companies	4,087	4,148	4,806	3,936
Professional Visitors	142,513	152,344	157,632	140,542
International Professional Visitors	31,000	32,892	33,418	35,874



### A fair with cross-sector representation from all other industries:

#### CONGELEXPO

Frozen products

#### EXPOBEBIDAS

Soft drinks, mineral waters, beers, ciders and grape juices

#### EXPOCONSER

Conserves and semi conserves

#### INTERCARN

Meat products and derivatives

#### INTERLACT

Milk & dairy products and derivatives

#### OLIVARIA

Olive oil and vegetable oils

#### INTERPESCA

Seafood and fish farming

#### INTERVIN

Wines and spirits



## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia

## 09. BARCELONA'S MUNICIPAL MARKETS, THE LARGEST NETWORK OF FOOD MARKETS IN EUROPE

The foodstuff industry is strengthened by a food culture based on quality and health, and this has had the knock on effect of creating a wide range of stalls in municipal markets, and especially those in the Barcelona area. Barcelona's markets have a thousand years of history behind them and they are a significant part of the city's economy, where one can find a wide range of food and mainly fresh produce.



The network of markets in Barcelona is the largest network of food markets in Europe, with 43 markets -39 of these food markets and 4 non-food markets- scattered across the city's different neighbourhoods. In these markets you'll find 2,895 stalls, with 1,984 of these food-related, and in 18 of the markets we can find some sort of supermarket (self service) operator. Markets in Barcelona are grouped under the network of markets overseen by the **Institute of Municipal Markets of Barcelona**, the largest network in Europe. Figurewise, the city's markets boast 108,000 m<sup>2</sup> of commercial surface area, 208,500 m<sup>2</sup> of constructed area, and about 8,000 direct jobs. Estimates show that every year the city markets get 60 million visitors and customers and the value of their purchases amount to between 950 and 1.1 billion euros. Local markets are very dynamic, a hive of activity, but they also help to promote a food culture based on a balanced, healthy and quality diet.

### Markets with an international projection

Different markets and towns across Europe have joined together under the Emporion Association to defend and strengthen the role of markets as keys to urban, commercial, social and cultural development. The association, based in Barcelona, provides support so that markets can improve their every day business practice, and it aims to provide markets with a voice at the European Union level, too. As such, the Association is also promoting a project called **Med Emporion** with European funding and led by Barcelona, and the result has been exhibitions, educational projects, studies and best practices identified in this business.

### Markets as social, cultural and health benchmarks

Different activities are carried out in markets, like campaigns, events and other measures such as:

- Campaigns promoting health related issues such as *Fight Cancer Week* or *Cardiovascular prevention workshops*.
- Educational programmes for schools, to encourage the use of food markets and healthy eating habits like *To keep a balanced diet, I eat market produce*.
- Organization of market and product fairs like *The market of markets* campaign.
- Participation at events and workshops like *Alimentaria* and *Barcelona Degusta*.
- Joint action programmes with social organizations across the region like *The Big Food Collection* with Banc dels Aliments or the *Solidarity Bag* with the movement *Escolta*.
- Consumption promotions to favour environmentally-friendly measures like the distribution of reusable bags.
- Promotional campaigns to stimulate sales like *Pla de dinamització comercial*.





## 10 reasons to invest in the Foodstuff Industry in Barcelona and Catalonia

# 10. BARCELONA AND THE MEDITERRANEAN DIET

**Barcelona's people are the heirs to the Mediterranean Diet and a food culture deeply rooted in our history for thousands of years. This has allowed us to enjoy a healthy diet and create an internationally recognized culinary tradition.**

On the 16<sup>th</sup> of November 2010, UNESCO decided to recognize the Mediterranean Diet as a World Intangible Cultural Heritage. This recognition was thanks to an alliance between Spain, Italy, Greece and Morocco, who had been working for two years to win the nomination. With its headquarters in Barcelona, the **Mediterranean Diet Foundation (FDM)** has been the key organization in this transnational coordination process.

This UNESCO recognition represents a major boost to the international prestige of the Mediterranean Diet and its general promotion. This has also been the case when other concepts have been recognized by UNESCO as world heritage. The move also means a huge boost for the promotion of local agricultural production related to Mediterranean and avant-garde cuisine, sustainable rural development, our landscape and the overall environment of our region.

The Mediterranean Diet Foundation was created in 1996 to preserve a lifestyle shared by the Mediterranean's different peoples for thousands of years. Scientists have shown that this lifestyle is beneficial for our health and wellbeing. Also, it contributes to the maintenance of sustainable agriculture and the preservation of the environment. The main objectives of the Foundation are to promote research about the Mediterranean Diet in relation to health issues, history, culture, cuisine, agriculture and environmental studies, and to use the results to promote the Mediterranean to different population groups.

The Board of Trustees of the Foundation's Honorary President is HRH Infanta Cristina and it has the support of the main official institutions:

- Ministry of Agriculture, Food and Environment (MAGRAMA)
- Olive Communal Heritage Foundation
- Barcelona City Council
- Mercabarna
- Department of Agriculture, Livestock, Fisheries, Food and Natural Environment (DAAM). Together with 8 companies in the foodstuff industry.

The Foundation has an international scientific committee made up of over 23 renowned international researchers from over 12 countries.

The main activities of the Foundation include:

- School education campaigns about food and the Mediterranean Diet Foods
- Organization of the Barcelona International Congress on the Mediterranean Diet
- The International Observatory of the Mediterranean Diet Report.

**Catalonia as an international gastronomy and restaurant benchmark:** for example, Catalonia has more Michelin-starred eateries than any other Spanish region:

- Restaurants with 1 star: 39
- Restaurants with 2 stars: 3
- Restaurants with 3 stars: 4

El Bulli Foundation (Ferran Adrià)  
[www.elbulli.com](http://www.elbulli.com)

El Celler de Can Roca  
(Josep Roca, Jordi Roca and Joan Roca)  
[www.cellercanroca.com](http://www.cellercanroca.com)

El Racó de Can Fabes (Founded by Santi Santamaria, Àngels Serra and Xavier Pellicer)  
[www.canfabes.com](http://www.canfabes.com)

Sant Pau (Carme Ruscalleda)  
[www.ruscalleda.com](http://www.ruscalleda.com)





# Links

## Universities and Research Centres

Centre for Research in Economics and Agricultural development (CREDA)  
[www.creda.es](http://www.creda.es)

Centre for Animal Health Research (CReSA)  
[www.cresa.es](http://www.cresa.es)

Spanish National Research Council (CSIC)  
[www.csic.edu](http://www.csic.edu)

Centre for New Technologies and Food Processes (CENTA)  
[www.centa.cat](http://www.centa.cat)

ESADE  
[www.esade.edu](http://www.esade.edu)

School of Agricultural Engineering of Barcelona  
[www.esab.upc.edu](http://www.esab.upc.edu)

IESE  
[www.iese.edu](http://www.iese.edu)

Catalan Institute of Vines and Wine  
[www.gencat.cat/dar/incavi](http://www.gencat.cat/dar/incavi)

Institute for Research and Technology (IRTA)  
[www.irta.cat](http://www.irta.cat)

Laboratory of Vegetable Molecular Genetics (Consortium CSIC-IRTA)  
[www.csic-irta.es](http://www.csic-irta.es)

Autonomous University of Barcelona  
[www.uab.es](http://www.uab.es)

University of Barcelona  
[www.ub.edu](http://www.ub.edu)

University of Girona  
[www.udg.edu](http://www.udg.edu)

University of Lleida  
[www.udl.es](http://www.udl.es)

Polytechnic University of Catalonia  
[www.upc.edu](http://www.upc.edu)

Rovira i Virgili University  
[www.urv.cat](http://www.urv.cat)

## Local and regional agencies

22@Barcelona  
[www.22barcelona.com](http://www.22barcelona.com)

ACC1Ó - Government of Catalonia  
[www.acc10.cat](http://www.acc10.cat)

Barcelona City Council Economy, Business and Employment Area  
[www.bcn.cat/barcelonabusiness](http://www.bcn.cat/barcelonabusiness)

Autonomous Regional Government of Catalonia  
 Department of Agriculture, Food, Rural Action  
[www.gencat.cat/darp](http://www.gencat.cat/darp)

Institute of Municipal Markets  
[www.mercatsbcn.com](http://www.mercatsbcn.com)

Mercabarna  
[www.mercabarna.es](http://www.mercabarna.es)

Barcelona Zona Franca Consortium  
[www.elconsorci.net](http://www.elconsorci.net)

## State agencies

Ministry of Agriculture, Food and Environment  
[www.magrama.es](http://www.magrama.es)

## Business organizations

AECOC – GS1 Spain  
[www.aecoc.es](http://www.aecoc.es)

Barcelona Chamber of Commerce  
[www.cambrabcn.org](http://www.cambrabcn.org)

Clúster Catalonia Gourmet  
[www.cataloniagourmet.cat](http://www.cataloniagourmet.cat)

Emporion  
[www.emporion.org](http://www.emporion.org)

Barcelona trade fair  
[www.firabcn.es](http://www.firabcn.es)

Mediterranean Diet Foundation  
[www.fdmmed.org](http://www.fdmmed.org)

Triptolemos Foundation  
[www.triptolemos.org](http://www.triptolemos.org)







With co-financing

