



# Agri-Food COUNTRY PROFILE

**SPAIN**

**February 2003**



**Canada**

# Spain

## AGRI-FOOD COUNTRY PROFILE

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### Executive Summary

- Spain is the eighth largest economy in the world, and the fifth largest in the European Union.
- In 2003, Spain's GDP is projected to reach 3.5%.
- Spain's agricultural sector is projected to experience increased growth as Spain possesses the widest range of agricultural produce between EU countries.

### Canada- Spain

- In 2002, bilateral agricultural trade between Canada and Spain was valued at \$232.2 million.
- Canada exported over \$76 million worth of agricultural products to Spain in 2002.
- Canada's agricultural exports were dominated by bulk goods.
- Canada's major agricultural exports to Spain in 2002 were soya bean, wheat nes and meslin, lentils, canary seeds and bovine semen.
- In 2002, Canada's agri-food imports from Spain were valued at \$161.1 million.

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# Spain

## COUNTRY PROFILE

### Economy

The Kingdom of Spain is the eighth largest economy in the world, and the fifth largest in the European Union (EU). Spain had a slowed growth in 2002, however, its GDP remains the fastest growing of the large EU economies.

### Overview

The Spanish economy has grown rapidly since its entry into the European Union (EU) in 1986 and the Economic and Monetary Union (EMU) in 1999. As with other members of the EMU, Spain adopted the Euro on January 1, 2002 as its only currency.

Gross Domestic Product		2002
<b>GDP</b>		US\$657.2 billion
GDP growth		2.1%(2002), 3.5% (2003)
GDP per capita		US\$16,210
<b>GDP by Sector</b>		
Services		66%
Industry		30%
Agriculture		3.7%

The economy is heavily dominated by the services sector, in particular, tourism, finance and banking, transport and telecommunications. Spain also possess's highly developed industrial and manufacturing sectors. While agricultural sector accounts for only a small percentage of the country's GDP, it still holds political and social importance. Fishing also remains a primary industry with its fishing fleet being amongst the largest in the world.

A distinguishable characteristic of Spain's market is the importance of its tourist industry. Spain receives 50 million tourist yearly, which results in a significant

increases in the demand for high-value and consumer ready products from the Hotel, Restaurant and Institutional (HRI) food sector during the months of summer.

### Current situation

In 2002, Spain's budget balance returned to deficit and is expected to go further into debt 2003. While inflation is expected to remain moderate until 2004. Spain's fiscal policy is also being loosened and structural reforms are being deferred until 2004.

A recent shift occurred that influenced the goods market equilibrium to produce higher levels of output. The main reason for that shift was a strong consumer and investor confidence in Spain's commitment to convergence. Also, Spain enjoys the highest job creation rates in comparison to the other Euro states.

Spain depends highly on its commercial partners for continued growth, and foreign trade and investment flows are amongst the most dynamic characteristics of the country's economy.

The economy is presently experiencing a slow growth period due to a general slowdown of the European and US economies. Spain's primary long-term concern has been its high rate of unemployment that reached 22% in 1996, and since then has been on a stable decline. Currently, the unemployment rate sits at approximately 11.3%.

### Government Role

The Spanish government influences the economy primarily through regulation, rather than direct ownership. However, the government does possess

partial or complete ownership of a few of the countries largest companies.

The government provides financial aid and tax benefits for activities conducted in specific industries that are considered priority sectors (agrofood, mining and technological improvement) in terms of their expansion and their influence on the overall economy of the country.

As well, the government of Spain offers financial aid and non-refundable subsidies of varying percentages, usually between 20-50% of the total investment. In addition to this, the government provides special tax benefits, such as municipal tax relief, relief from taxes levied on the formation companies, from customs duties applied to imports of machinery and certain specific corporate income taxes.

Spain has also become an active, and steadily more important player in international affairs in recent years. With an increasingly prominent role in the EU, Spain has a primary focus on the advancement of its national interests in Europe.

### Forecast

By 2005, it is estimated that 20% of Spain's population will be 65 years of age, and the average family will consist of four people at the most, with at least two of the members of the family in the workforce.

Spain's agricultural sector is projected to experience increased growth as Spain possesses the widest range of agricultural produce between EU countries. Indicators also show that the service sector will enjoy expansion in nearly all domains. There is expected growth in transportation, wholesale, retail trade and tourism. In particular, tourism appears promising as Spain continues its efforts to restore aging resorts. The telecommunications sector is also expected to see a significant increase. Furthermore, due to EU environmental regulations, Spain will invest an estimated US \$33 billion in industrial clean-

up, water and air pollution control as well as sewage treatment, water and soil treatment. That investment is expected to influence an increase in the environmental and aviation sectors.

### Consumer Market

<b>Demographics</b>	
<b>Total Population</b>	40 million
<b>Breakdown by Age</b>	14.5%
0-14 yrs	68.1%
15-64 yrs	17.4%
65 yrs and over	
<b>Life Expectancy</b>	
Male	75.63 years
Female	82.76 years
Total	79.08 years

It is expected that purchasing power will increase in the next few years, while the time spent shopping and preparing foods will decrease. As a result, it is anticipated that consumption habits will change.

Generally, Spanish consumers possess conservative tastes which are based on the cuisine of their geographical area. The customary Spanish diet, referred to as the "Mediterranean Diet", is based on seafood, vegetables, fruits, olive oil, wine and salads. While there presently exists a tendency for a higher consumption of prepared and ready to eat foods, diet products, low fat, low cholesterol and high fiber content foods, consumers are also demanding more natural products. This is evident as the consumption of organic foods is increasing.

BSE (Bovine Spongiform Encephalopathy) outbreak throughout the European Union has increased concerns in regards to food safety. BSE has affected meat consumption while pulse-based vegetarian meals have seen a massive increase.

Due to a number of factors such as urbanization, few trips are made per week to large supermarkets, as

opposed to the traditional daily purchases. At the same time, the traditional Mediterranean diet is slowly being replaced by North American eating habits.

<b>Major Cities</b>		<b>2003</b>
<b>Region</b>		<b>Population</b>
Andalusia		7.4 million
Catalonia		6.3 million
Madrid		5.37 million
Barcelona		4.3 million
Valencia		4.2 million
<b>Cities</b>		<b>Population</b>
Madrid		3.16 million
Barcelona		1.52 million
Valencia		741,100
Seville		679,100
Zaragoza		635,600

Consumption of fish products in Spain has seen substantial change as fish is more readily available from foreign markets, and the expectations for fish has changed as consumers want better quality fish at lower and more competitive prices. Though consumer preferences are primarily determined by price, fresh fish is generally preferred over frozen products. As fresh products account for 53% of total seafood consumption, followed by frozen fish with 34% and canned and cured seafood products at 13%. Fish products make up an increasingly significant part of the average Spanish household diet. Approximately 14% of the average Spanish household expenditure is spent on fish, molluscs, shellfish and other marine life, whether purchased in fresh, frozen, preserved or pre-cooked. In fact, Spain imports over US \$3.68 billion a year in seafood products, part of the reason why it has the second largest seafood consumption in the world.

Spain's food service sector, composed of the commercial (hotels, bars, and restaurants) and institutional (cafeterias in schools, prisons, hospitals,

and the army) foodservice outlets, accounts for 26.4% of food consumed in Spain.

## Labour

In 2001, Spain's labour force was estimated to be approximately 17.1 million, with an unemployment rate of 13% within that same year dropping to 11.4% in 2002. If projections were accomplished, women's participation in the labour market for the year 2005 in the 35-39 age group would reach 85%.

In the last few decades Spanish women have experienced a great increase in their labour activity. Nevertheless, in 2001 their activity rate was recorded at roughly 40%, while their unemployment rate was 10% higher than that of the men's, illustrating that there is still substantial room for improvement. However, age plays a crucial role in the recent evolution of women's activity rates and patterns. In fact, most of the increase in women's activity rates corresponds to the 30-34 age group, whose rate rose over 30% within a ten year span, from 30.8% in 1989 to 68.1% in 1999.

## Geography

Spain is located in southwestern Europe between France in the east, and Portugal in the west. Spain's total land area is 499,542 square km.

Spain's climate is generally temperate, with hot summers in the interior. However, most regions are seasonally variable, and dry. Temperatures are more moderate along the coasts, and a Mediterranean climate is common in the south. Spain's relief, combined with its peninsular and insular status and its geographic situation, open to the influence of the Atlantic Ocean, the Bay of Biscay and the Mediterranean Sea, has led to a considerable diversity of agroclimatic environments, which, in conjunction with human action, have shaped a variety of farming systems and settlement patterns.

Spain's capital, and largest city is Madrid, and it has an urban population is 17 million or 43% of the total population. Like many of its European counterparts the population is urbanizing rapidly, although the process was delayed somewhat, and still lags behind many of its neighbors. There are 38 cities in Spain with populations in excess of 100,000.

## **Infrastructure**

Spain's infrastructure consists of 346,858 km of highway, 15,171 km of railway and 1,045 km of waterways, few of which have any economic importance. The country also has 133 airports and 5 heliports along with ports and harbors found in Avile, Barcelona, Bilbao, Cadiz, Cartagena, Castellon de la Plana, Ceuta, Huelva, La Courna, Las Palmas, Malaga, Melilla, Pasajes, Gijon, Santa Cruz de Tenerife, Santander, Tarragona, Valenci, Vigo.

In Spain, the market is decentralized, because of this, two major cities, Madrid and Barcelona, act as hubs for Spain's regional market. Madrid connects the southern, western and central regions of the country while it also serves as the banking, administrative and transportation centre.

The Spanish Government, along with substantial EU funding, continues to invest heavily in the development of the country's transportation infrastructure. The government of Spain presented the Infrastructure Master Plan which is designed to prepare Spain's transportation infrastructure for the 21<sup>st</sup> century. The plan highlighted the major projects needed to complete and modernize the country's transportation infrastructure and place it at the same level as that of its European counterparts. The government of Spain has estimated the total cost of the project to be \$57 billion U.S.

The Infrastructure Master Plan places emphasis on airport, highway, railroad and port infrastructure projects, although the plan will also invest in the development of the telecommunication, environment and energy sectors.

## **Distribution and Sales Channels**

Foreign firms use various channels to distribute their products and services in Spain. The most commons means of distribution is via the appointment of an agent or distributor. Alternative channels of distribution include selling through wholesalers and dealers, and establishing a sales office in Madrid or Barcelona.

Due to the growth of the Spanish economy, distribution has been and remains, a key factor in supplying the consumer market. In the last few years, various consumer sales channels have developed significantly, ranging from traditional distribution methods whereby wholesalers sell to traditional shops, and those shops then sell to the public. There are also more sophisticated methods that have developed, characterized by an increased presence of large multinational supermarkets, retail-stores and Central Purchasing Units.

The majority of agents, foreign subsidiaries, distributors and entities controlled by government that comprise the economic power block of the country, which operates within the two hubs. Dealers, branch and government offices from outside these tow hubs most likely obtain their supplies from their Madrid or Barcelona contacts, rather than engage in direct importation.

Spain's food distribution sector is well developed, however it is dominated by a few major companies. The traditional retail sector which is composed of small retail traders, has diminished with hypermarkets and supermarkets accounting for roughly 85% of the Spain's food sales. Over the past few year, the number of hypermarkets has dropped from 35% to 31.8% of the market share. However the number of medium-sized supermarkets and discount markets has grown. There are more than 36 000 traditional retail food outlets, half of which are expected to close by 2004.

It is also expected that by 2005, only half of the traditional food outlets currently operating will remain

in business. To remain competitive, traditional outlets must depend on the sale of fresh products.

The key to a foreign firm achieving successful sales is to appoint a competent agent or distributor or establish an effective subsidiary in the Madrid or Barcelona areas.

### **General Merchandise Trade**

Due to its openness to foreign investment, Spain is involved in a large amount of general merchandise trades. In 2001, Spain exported \$118.6 billion US in machinery, motor vehicles, foodstuffs and other consumer goods. While imports were valued at \$150.5 billion worth of machinery and equipment, chemicals, fuels, semifinished goods, consumer goods and foodstuffs.

Spain is a major player in the world trade markets, and has several partnerships with various countries. Figures illustrate that Spain exports the following percentages of commodities: EU 71.2% (France 19.6%, Germany 11.8%, Portugal 9.9%, Italy 9%, UK 9%), U.S. 4.4%, and roughly 4% to Latin America.

### **Trade Agreements**

As a member of the European Union, Spain has no bilateral trade agreements with any developed nation. Members of the EU share a common agricultural policy, along with a joint transportation policy, as well as free movement of goods and capital with member states, and a common tariff on imported products from non-EU nations.

Spain and Iran signed a memorandum of understanding on the formation of a joint Iran-Spain trade committee. The two countries enjoy bilateral cooperation in oil, gas and petrochemical industries. The two countries are also cooperating in other areas such as steel, fishing, shipbuilding, saffron and construction stones.

Spain is a member of the EMU (Economic and Monetary Union) and Spain has also been elected as a member of the UN Security Council for 2003 to 2004. As well, Spain is a member of: the Organization for Economic Co-operation and Development (OECD), the World Bank (WB), International Monetary Fund (IMF), World Trade Organization (WTO), United Nations conference on Trade and Development (UNCTAD), European Bank for Reconstruction and Development (EBRD), African Development Bank (AfDB), and the Inter-American Development Bank (IDB).

### **Investment**

The Spanish government creates and maintains an open investment climate. In so doing, Spain is an excellent place to invest as there exists there, a consumer demand for new products, an increasing demand for process foods coupled with a modern food distribution system.

Spain maintains few restrictions on foreign investment; it allows up to 100 percent foreign ownership in most sectors and its liberalizing regulations on capital movements. In most cases, prior investment approval is not required.

Spain's foreign direct investment experienced a dramatic increase within the last decade from less than 1 percent of GDP to nearly 10 percent, and inward FDI has risen from just under 3 percent of GDP to nearly 7 percent.

Spain has gone from being a net importer of investment accounting for 2% of GDP annually to being a net exporter 3%. This has resulted in Spain becoming the sixth largest investor in the world.

### **Market Access**

Spain's trade policies are mostly determined by EU agreements and practices. In fact, the EU exercises a variety of strict plant and animal health standards which function as trade barriers. Generally, a product

that meets the standard and certification requirements of any other EU country can be imported and sold in Spain without further testing.

### Tariffs

For non-EU countries, Spain employs common EU external tariffs on all imports, while it has eliminated tariff barriers on imports from fellow EU countries.

### Value Added Tax

On the majority of goods or services sold, there is a value added tax rate of 16%. However, there is a reduced rate of 7% on sales and imports of food items, water, pharmaceutical products, private homes. This reduced rate also applies to services such as: domestic transportation of passengers, hotels restaurants and theatres. Lastly, there exists a further reduced rate of 4% which is applicable to: bread, flour, milk, cheese, eggs, fruits and vegetables, written materials which do not primarily contain advertising, pharmaceutical specialties, cars and prostheses for the handicapped, and certain officially sponsored housing.

### Certification Requirements

For most fresh fruit, vegetable and plant materials, phytosanitary certificates are required. In most instances, commodities composed of animal products or by-products, as well as those subjected to heat treatment or irradiation, the Member State of destination would require an official government export document with the shipment, regardless of the intended use for the product. As for textile or apparel products, certificates of origin are required.

All exports to Spain must include the standard set of shipping documents: a commercial invoice, export declaration form, bill of lading packing list and certificate of origin.

Certificates of sales and letters authorizing an exporter's local agent or importer to act on their behalf or other documents that must be authenticated, and must be notarized in Canada first.

Notarized documents, at no cost can be authenticated by sending them to the Authentication and Service of Documents of the Department of Foreign Affairs and International Trade.

For Canadian exporters dealing in the Spanish market, the Canadian Special Crops Association (CSCA) could be a useful contact.

### Import Licenses

Import licenses are issued by the registrar general of the Secretariat of Trade in Spain, and they are valid for 6 months. The request for an import license must also be accompanied by insurance fees, an invoice for listing transportation, the cost, insurance and freight price, net and gross weight, and the invoice number.

The integrated tariff of the European Union, known as TARIC, is designed to show various rules that apply to specific products being imported into the customs territory of the EU.

### Label Requirements

Label information must include: the product name, list of requirements, net weight or volume (in metric), expiration date, directions for storage and use, country of origin, lot number, and the importer's name. All label information is mandatory and must be printed in Spanish.

Nutritional labelling is only necessary when a nutrition claim is made in the labelling, advertising or presentation of the product or when it is needed by another EU directive. Information on labelling requirements can be found on the Agriculture and Agri-Food Canada web site at <http://ats/agr/ca/info/europe/e1429.hmt>.

### Market Constraints

EU regulations have made it more difficult for non-EU member countries or foreign investors to access Spain's markets. Furthermore, former colonial dependents, receive preferred treatment from the



EU. The EU also grants preferential tariffs to roughly more than 100 developing countries mainly in Africa and the Middle East and about 40 overseas territories under the EU Generalized System of Preferences (GSP). A system of providing certificates of origin has been established to ensure that goods are not diverted through the GSP countries to take advantage of the lower tariff concessions.

## **Agriculture And Agri-food Overview and Outlook**

Spain has one of Europe's largest Agricultural sectors and is a large recipient of Common Agricultural Policy (CAP) funding.

Spain's agricultural sector accounts for 5% of the GDP. Arable land makes up 29% of the total land area, while 9% of the total is occupied by permanent crops. Though agriculture had played a smaller role in the overall economy since Spain's induction into the EU, membership in the EU has significantly assisted the export of horticultural items such as fruits, vegetables, and olive oil. Spain's horticultural crops account for 70% of the country's agricultural exports.

However, Spanish lamb, beef, pork, poultry, dairy products, and cereals have struggled in export markets due to increased competition from other EU countries.

Spain is also a fairly important producer of wine, olive oil, fruit and vegetables. It has developed a greenhouse industry in the south-east which, thanks to the benign climate, has become one of the most competitive suppliers of fresh produce to main European markets.

The Spanish food processing industry is the fifth largest within the European Union. The food processing sector comprises 5.5% of Spain's GDP. It represents approximately 20% of the country's total industrial production and employs 17% of the total work force. There are approximately 38 000

food processing plants in Spain, including 559 fruit and vegetable processing centres. While Spain ranks as the second largest per capita consumer of fish in the world behind Japan.

## **Agricultural Policy**

In 1962, Spain adopted the Common Agricultural Policy (CAP) in order to guarantee the security of food supplies at stable and reasonable prices, to modernize agricultural structures, and to ensure a fair standard of living for farmers. At the same time, the CAP acted as a foundation for Spain's integration into the EU.

As a member of the EU, Spain is also in the process of expanding its Common Agricultural Policy (CAP) as an incentive to optimize the management of farmer's financial resources and to encourage Spanish farming on the basis of advantages similar to the rest of Europe. Also, there is a Spanish Renewal Plan that is motivating farmers to update their machinery in order to be more competitive and productive.

Market Unity between Member States allows products to circulate freely, without customs duty, equivalent charges, or subsidies which distort competition. It requires the common organization of markets as well as the introduction of common prices, harmonization of health protection and veterinary regulations, and stable currency parties within the EU.

Present agri-food policies are more consumer oriented. Consumer protection and full information about production methods and improved product quality are now the priorities when it comes to agricultural policy. These new policies encourage sustainable food production and promote consumer choices that support sustainable production methods.

## **Agri-Food Import Market Competitors**

In Spain, the major import competitors for Canadian exports are Western European firms. European

firms, specifically those that are EU members are heavy competition within the import market as they are permitted free trade through out EU member countries such as Spain. However, the United States is becoming an increasingly stronger competition as the traditional Mediterranean diet is slowly becoming replaced by the North American diet. In addition to this, Asian competitors are increasing there market share in Spain.

### Canada - Spain Trade and Investment

Spain and Canada have made efforts over the past few years to develop a new relationship based on common interests in international matters, academic and cultural exchanges, and trade and bilateral investment, so that relations may develop beyond the fisheries.

In 2002, bilateral agricultural trade between Canada and Spain was valued at \$232.2 million. Spain dominated the two-way trade which resulted in a negative trade balance for Canada valued at \$84.9 million.

Canada exported over \$76 million worth of agricultural products to Spain in 2002. Canada's exports declined by 44% from 2001's total of \$169.4 million. The significant drop in Canada's exports came as a result of a \$81 million decline in the exports of peas. On a positive note, soya bean exports increased by a value of roughly \$20.8 million over 2001.

In 2002, Canada's exports were dominated by soya bean and wheat nes and meslin. Exports of soya beans were valued at \$20.9 million while wheat nes and meslin were valued at \$18.2 million. Lentils, canary seeds and bovine semen rounded out

Canada's agricultural exports were dominated by bulk goods with a value of \$46.9 million. Intermediate exports were valued at \$26.7 million and consumer exports were valued at \$2.3 million.

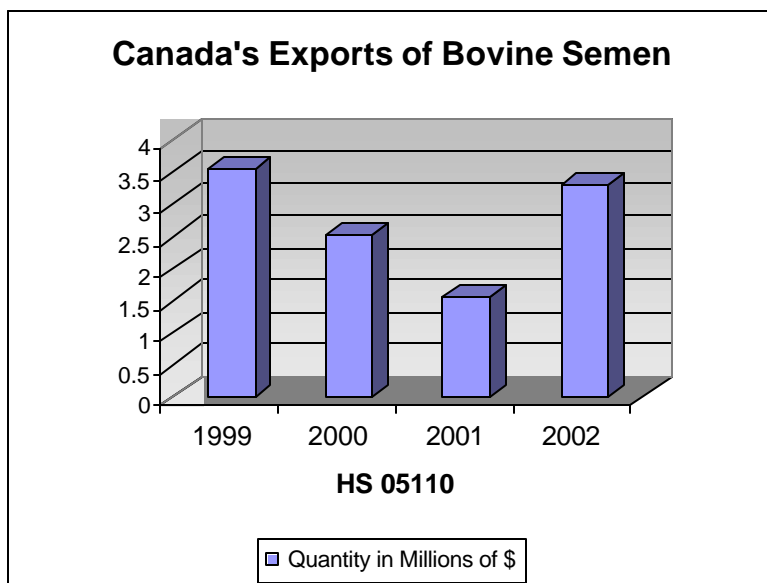
In 2002, Canada's agri-food imports from Spain were valued at \$161.1 million, an increase of \$17

million over 2001. Imports were dominated by grape wines which made up 19.4% and mandarins which made up 13.7%. Imports of olives, olive oil and sugar confectioneries rounded out the top five imports.

<b>Canada - Spain Bilateral Trade 2001</b>	
<b>Total trade</b>	US \$ 269.1 billion
Exports	US \$118.6 billion
Imports	US \$ 150.5 billion
Balance	US \$ - 31.9 billion
<b>Canada-Spain Trade</b>	
Exports	CAN \$865.1 million
Imports	CAN \$883.4 million
Balance	CAN \$ -18.3 million
<b>Canada-Spain Ag-Trade</b>	
Exports	CAN \$135 million
Imports	CAN \$143 million
Balance	CAN \$ - 8 million

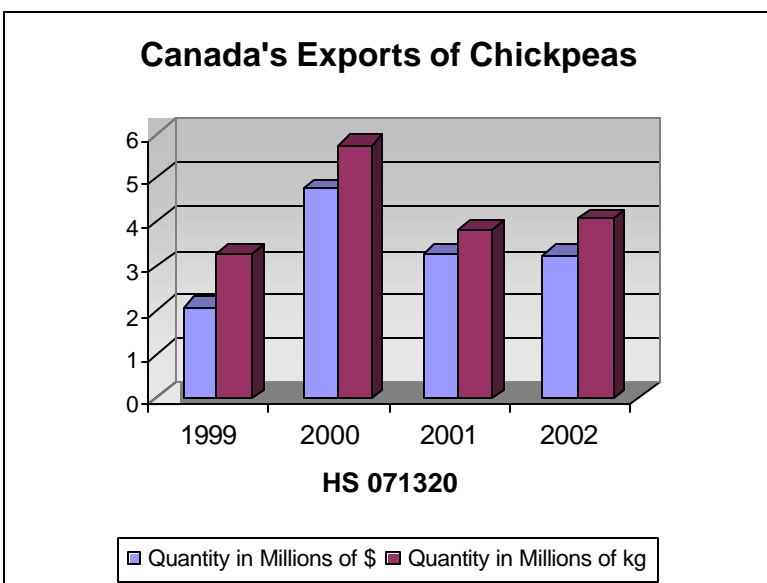
## Canada's Exports to Spain

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Bovine semen represented 4.3% of all agricultural exports in 2002. Spain was Canada's 4<sup>th</sup> largest market for this product.

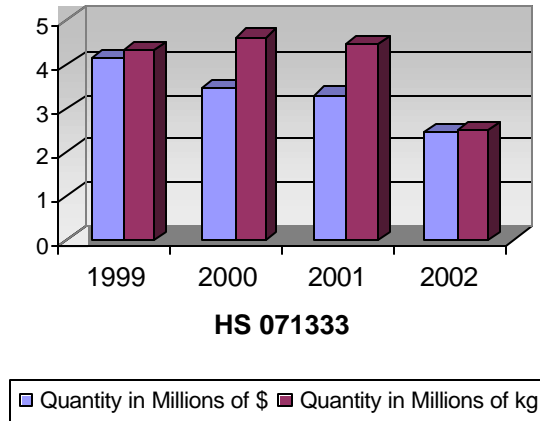
Canada exported \$3.2 million worth of Bovine semen to Spain in 2002. This represented a slight decrease in value over 2001.



Chick peas represented 4.2% of all agricultural exports in 2002. Spain was Canada's 5<sup>th</sup> largest market for this product.

Canada exported \$3.2 million of its chickpeas to Spain in 2002. This represented a stable balance since 2001.

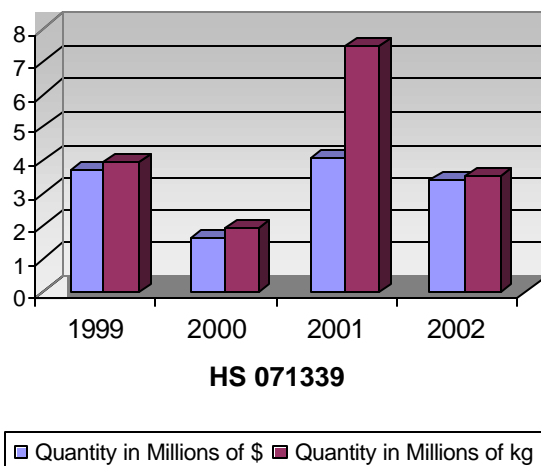
### Canada's Exports of Kidney Beans and White Pea Beans



Kidney bean and white pea beans represented 3.2% of all agricultural exports in 2002. Spain was Canada's 5<sup>th</sup> largest market for this product.

Canada exported \$2.4 million worth of kidney beans and white pea beans to Spain in 2002. This represented roughly a decrease in value of \$1 million over 2001.

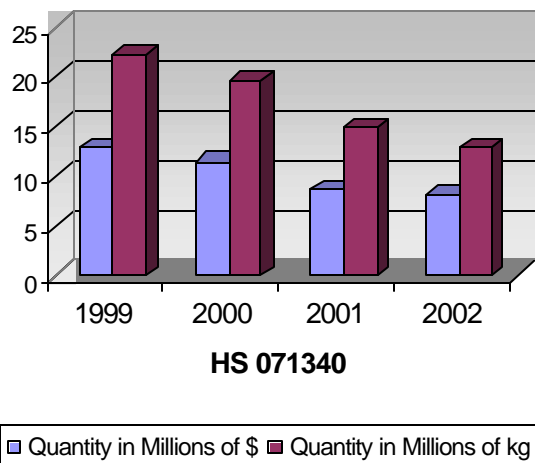
### Canada's Exports of Beans



Beans represented 4.4% of all agricultural exports in 2002. Spain was Canada's 5<sup>th</sup> largest market for this product.

Canada exported \$3.3 million worth of its beans to Spain in 2002. This represented a decrease in value of roughly \$700 000 over 2001.

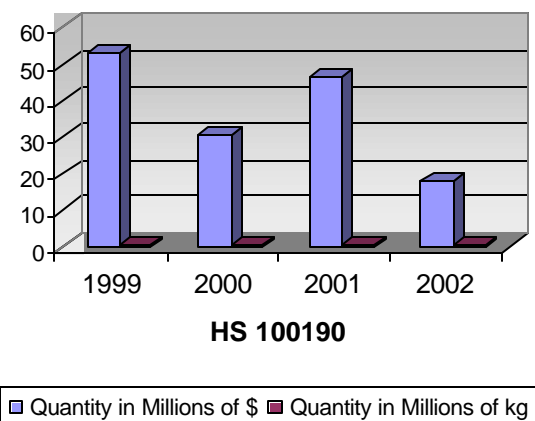
### Canada's Exports of Lentils



Lentils represented 10.7% of all agricultural exports in 2002. Spain was Canada's 5<sup>th</sup> largest market for this product.

Canada exported \$8.1 million worth of its lentils to Spain in 2002. This represented a stable value since 2001.

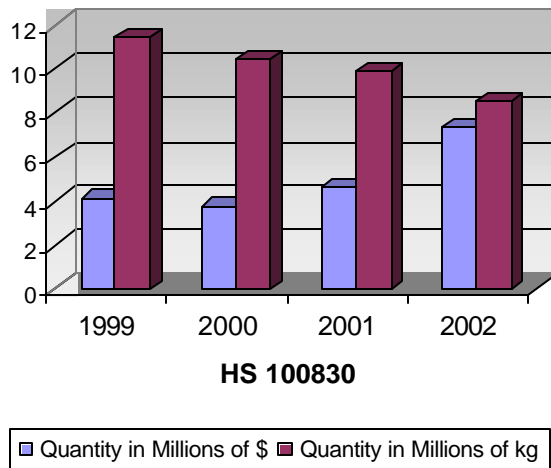
### Canada's Exports of Wheat Nes and Meslin



Wheat nes and meslin represented 23.9% of all agricultural exports in 2002. Spain was Canada's 24<sup>th</sup> largest market for this product.

Canada exported \$18.2 million worth of its wheat nes and meslin to Spain in 2002. This represented a decline in value of \$28.5 million over 2001.

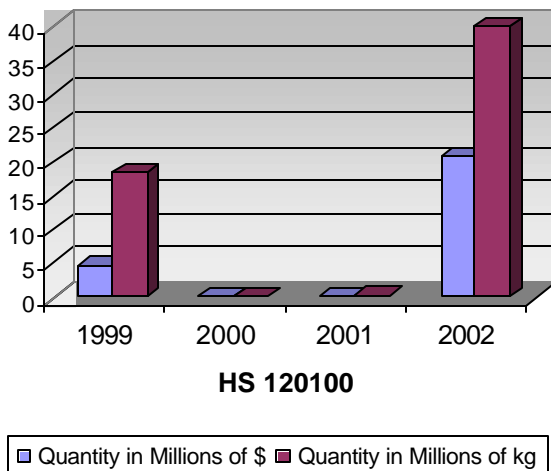
### Canada's Exports of Canary Seed



Canary seeds represented 9.6% of all exports in 2002. Spain was Canada's 5<sup>th</sup> largest market for this product.

Canada exported \$7.3 million worth of its canary seeds to Spain in 2002. This represented a \$2.7 million increase in value over 2001, as well as a four year high.

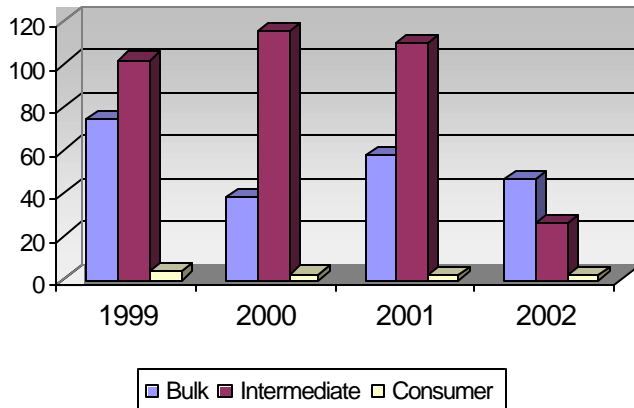
### Canada's Exports of Soya Beans



Soya beans represented 27.5% of all agricultural exports in 2002. Spain was Canada's 4<sup>th</sup> largest market for this product.

Canada exported \$20 million worth of its soya beans to Spain in 2002. This represented an increase in value of \$ 20 million over 2001.

### Canada's Exports of Bulk, Intermediate and Consumer Products



Canada's agriculture and food exports were dominated by bulk oriented goods in 2002. Bulk goods represented more than 61% of Canada's total agriculture and food exports. While bulk goods declined by 18.4% in 2002, the total was still well above the low for the review period. Intermediate commodities represented the second largest category, but the total in 2002 was the lowest in this review. Consumer goods, while the smallest product grouping increased slightly in 2002. Exports of intermediate goods remained stable.

## Additional Information

Trade Shows		
Show	Location	Date
2003 EBWA Convention and Trade Fair	Barcelona, Spain	March 4-7, 2003
Salon de Gourmets	Madrid, Spain	March 3-April 3, 2003
Club de Gourmets International Fair	Madrid, Spain	March 31-April 3, 2003
Snackex 2003	Barcelona, Spain	June 9-10, 2003
Eurofruit	Lleida, Spain	September 25-29, 2003
General Trade Fair	Zaragoza, Spain	October 8-13, 2003
Alimentaria	Barcelona, Spain	March 4-8, 2004

Canadian Contacts in Spain	
<p><b>Canadian Embassy</b></p> <p>Calle Nunez de Balboa, 35 28001 Madrid, Spain Contact: Marc Gagnon, Commercial Officer Phone: 34-91-423-3250 Fax : 34-91-423-3252 E-mail: <a href="mailto:marc.gagnon@dfait-maeci.gc.ca">marc.gagnon@dfait-maeci.gc.ca</a> Internet: <a href="http://www.canada-es.org">http://www.canada-es.org</a></p>	<p><b>Canadian Consulate in Barcelona, Trade Office</b></p> <p>Plaça de Catalunya 9, piso 1, pieza 2A Barcelona, Spain Phone: 34-93-412-7236 Fax : 34-93-317-0541 E-mail: <a href="mailto:bclna@dfait-maiec.gc.ca">bclna@dfait-maiec.gc.ca</a> Internet: <a href="http://www.canada-es.org">http://www.canada-es.org</a></p>

Key Spain Contacts	
<p><b>Spanish Department of Agriculture</b></p> <p>Paseo de la Infanta Isabel, 1 28014 Madrid Phone: 34-9-34-5000 <a href="http://www.mapya.es">http://www.mapya.es</a></p>	<p><b>Secretariat of Trade in Spain</b></p> <p>Paseo de la Castellana, 162 28046 Madrid Phone: 34-91-583-7560/ 349-3500 Fax: 34-91-349-3740</p>
<p><b>Department of Economy</b></p> <p>Paseo de la Castellana, 162 28071 Madrid Phone: 34-91-583-7400 <a href="http://www.mineco.es">http://www.mineco.es</a></p>	<p><b>The Canadian Special Crops Association</b></p> <p>1215 - 220 Portage Avenue, Winnipeg, Manitoba R3C 0A5 Phone: 204-925-3780 Fax: 204-925-3785 <a href="http://www.specialcrops.mb.ca">http://www.specialcrops.mb.ca</a></p>



As of February 2003, other Country Profiles and Statistical Updates are available for the following markets:

Argentina 2001*	Australia 2003	Brazil 2003	Chile 2002*
Colombia 2002*	European Union 2000*	France 2002	India 2002
Indonesia 2000*	Israel 2000	Italy 2003	Japan 2003
Malaysia 2000*	Mexico 2002	Phillippines 2000*	Poland 2002
Russia 2002	South Africa 2000*	Singapore 2001*	Spain 2003
Taiwan 2003	Thailand 2001*	Ukraine 2002	Hungary 2002
South Korea 2003	Venezuela 2002*	Vietnam 2001*	Germany 2003
Czech Republic 2002	United Kingdom 2003	Egypt 2001	Tunisia 2002*
Cuba 2002*	CARICOM 2002*	Mercosur 2002*	ANDEAN 2002*
Iran 2002*	Algeria* 2002	Hong Kong 2003	New Zealand 2003

\* Statistical updates available as of December 2002.  
These reports are available on the Agri-Food Trade Service (ATS) web site:  
<http://ats.agr.ca>  
Please address any comments or suggestions you have on this report to:

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Ces rapports sont également disponibles en français.

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