



# SPAIN'S food manufacturers

A PRESTIGE BOOK

3<sup>rd</sup> edition



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5. Brazil
6. Western Europe
7. Eastern Europe
8. Africa
9. Middle East
10. Russia
11. China
12. Japan
13. South Korea
14. Rest of Asia
15. Oceania



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# A brief history of the Spanish Food and Drink Industry

The Spanish Food and Drink industry is one of the most ancient ones and has had a very significant impact on the world's diet. Spain's unequalled conditions for agriculture and livestock rearing, (due to its very varied climates and geography) has fostered the development of an industry that nowadays holds one of the top positions worldwide (we are the 5<sup>th</sup> exporter in the EU and the 10<sup>th</sup> worldwide).

A journey through Spain inevitably implies a journey through its food industry. The great variety of cultures who have passed through Spain over the ages have left an indelible mark on food processing and conservation techniques, many of which are still in use today. The first settlers of the Iberian Peninsula, the Celtiberians, manufactured cold meats and cured ham as far back as the third century B.C. And although manufacturing techniques have evolved considerably since then, we can say that the Spanish ham curing tradition is rooted in millennial conservation techniques. Nowadays Spanish cured ham is considered amongst the best in the world.

Spain is the number 1 worldwide producer of olive oil, one of our hallmarks. We owe this to the Phoenicians and Greeks, who not only introduced their production techniques to the Iberian Peninsula, but also traded our oil all throughout the Mare Nostrum, where it was considered the finest quality oil available. Spain is the world's largest producer and exporter of olive oil; with 260 varieties of olives, it boasts the broadest diversity of this fruit in the world.

But it is to the Romans that we owe some of our cuisine's characteristic dishes. They taught us wine growing and wine making techniques making Spanish wines some of the most sought-after of the whole Empire. Currently Spain is the 3<sup>rd</sup> wine producer in the world and the one with the most hectares of vine plantations; Spanish wine is considered one of the best in the world. The Romans also taught us innovative food conservation methods such as salting fish, brine and vinegar, methods that are used extensively in the modern Spanish canning industry.

Many centuries after the fall of the Roman Empire came the golden Arab age. This civilization, which dominated a large part of Spain during 8 centuries, taught us how to manufacture a number of products, and introduced methods which would significantly improve food production. They were the ones who perfected oil extraction. Their contribution was so significant that the Spanish word for oil comes from the Arab *al-zait*, meaning "olive juice". They were also the ones who introduced farming and sugar cane processing as well as the manufacture of a number of desserts. Many of them, such as marzipan and nougat, are still an integral part of our cuisine and are enjoyed throughout the world.

The discovery and conquest of America was a turning point for food consumption throughout the planet. From America, the Spaniards brought products like tomatoes, potatoes and





paprika. Where would the food industry be without these products? They were also the ones who brought chocolate back from America, sweetened it for the first time and sold it, extending its consumption to the rest of the world. Innovative conservation systems were imported from America such as lyophilization, or freeze-drying, a technique that is widely used in the food industry today.

The Spanish Food and Drink Industry owes some of its success to French discoveries. By chance in 1840, soon after the Napoleonic invasions, the Spaniards discovered preserved foods inside a sunken French ship off the coast of Galicia. Thus the sterilization technique was implemented, a true revolution for the Spanish canning industry. Hence the fish and seafood sector began its unstoppable growth that led it to reach its current position of worldwide leadership. The fruit and vegetable sector also benefited from this as it allowed for the processing of fruit and vegetables and their distribution overseas. Today Spain is one of the top tinned food producers in the world.

Soon afterwards, in 1850, the development of industrial cooling set a new landmark. Not only did it allow the Spanish fishing industry (already well known since Roman times) to extend its fishing territory to faraway seas and return with its catch still fresh, but it also paved the way for the creation and expansion of an entire sector of frozen and refrigerated products which has an ever-growing importance in our industry.

And the rural exodus of the twentieth century brought new changes to Spain's food industry. If until then the population was primarily rural and lived off the land, moving to the city implied greater dependence on processed

What distinguishes the Spanish industry is the ongoing improvement of its products' quality, ranked amongst the best in the world

food. This accelerated mechanization, giving way to the implementation of the latest technological advances in food manufacturing.

Spain's entry in the EU (1986) brought with it greater access to foreign markets. From that point onwards exports have grown constantly. On the other hand, the influx of foreign capital and know-how accelerated the industry's pace of modernization and globalization.

Having entered the third millennium, what distinguishes the Spanish industry is the ongoing improvement of its products' quality, ranked amongst the best in the world; the implementation of research, development and innovation; the application of cutting edge technology; the diversification of its offer; the implementation of complete traceability and the special emphasis placed of client satisfaction.

## A strategic sector for the Spanish economy (*The sector today*)

The Food and Drink Industry is a key piece of the Spanish economy. During the economic crisis, this sector remained strong, continued growing and solidly drove the economy. It is currently the number 1 industrial sector in Spain in terms of revenue, the 5<sup>th</sup> in Europe by turnover (after France, Germany, Italy and Great Britain), and the one with the biggest growth within the Euro zone.

In 2016, the 28,038 companies that make up the Industry closed the year with a production worth of 96.4 Bill. €, equivalent to 3% of the Spanish GDP.

But this data is only one of the aspects of the Food and Drink Industry's importance for the country. There is much more behind it: land, culture, tradition, modernity and values that very few sectors can boast.

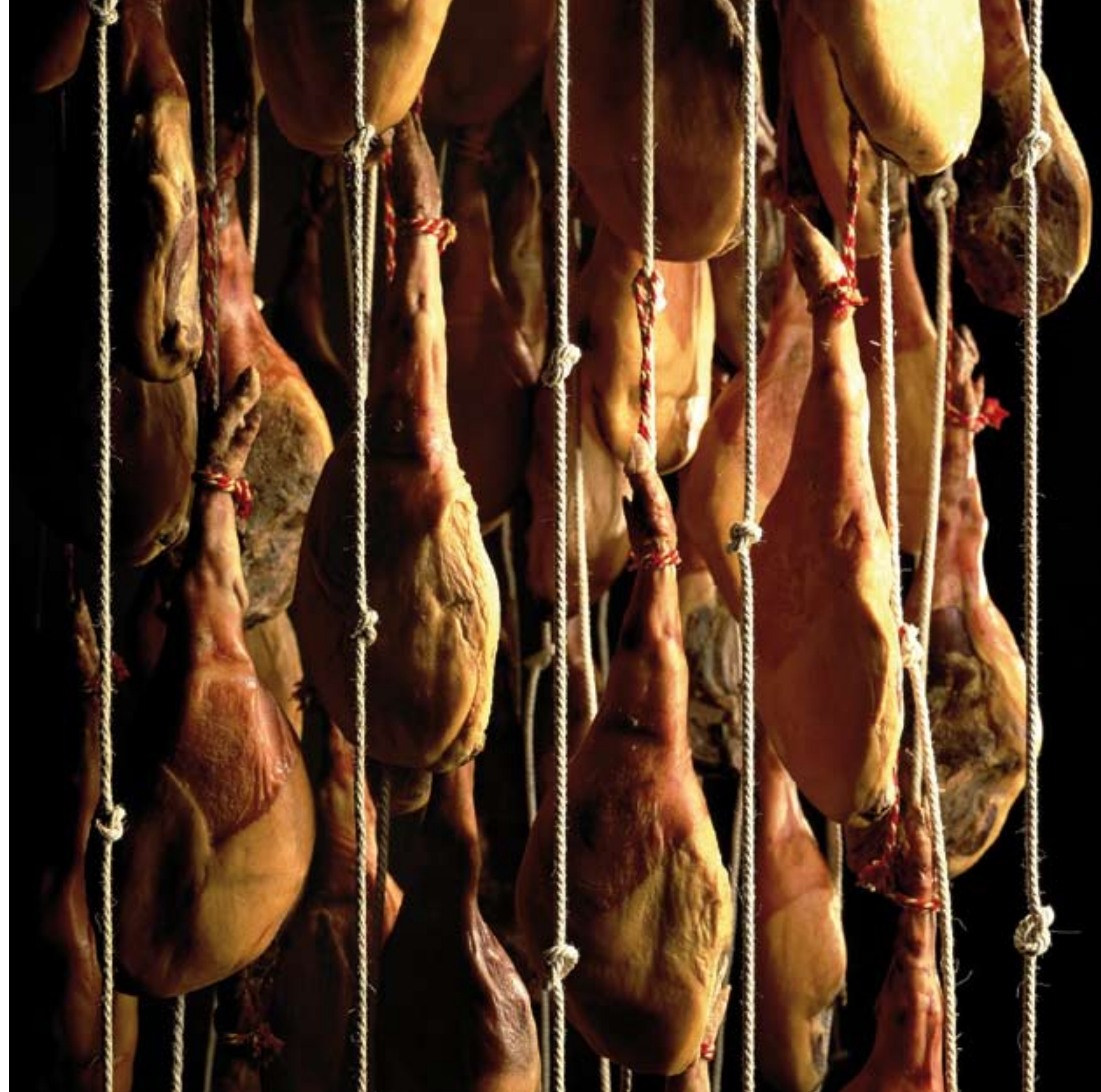
To start off with, the Spanish agro-industry is closely linked to the agricultural and livestock sectors, from which it obtains most of its raw materials. These in turn depend on the Industry to place large production volumes, given that it processes over 70% of agricultural production.

Due to this tight link, the improvements and innovations in irrigation techniques, farming, harvesting and livestock rearing developed by the Spanish agriculture and livestock sector have had a direct repercussion on the Industry, which has benefited from its increase in productivity.

Spanish cuisine, currently at the top of the international scene, has contributed to creating a very positive image of the Spanish Food and Drink Industry

In 2016 the Industry directly employed 480,000 people, equivalent to 21% of industrial employment. Given that most of the factories are located close to their source of raw materials, the Industry acts as a motor of rural development and is essential for generating employment in rural areas. It must be said that, the industry is a key link in the food and agriculture chain, responsible for the supply of millions of safe, quality meals every day, both at homes and at hotels, restaurants and bars.

On the other hand, the food and agriculture industry plays a significant role in perpetuating and passing on Spanish culture, recovering indigenous animal species, strengthening the production of traditional products, rescuing ancient food manufacture and conservation techniques – which combine





with the latest technology – and spreading Spanish culture and cuisine through its products.

The agro-industry has also favoured the development of regional specialties protected by Regional Designation (such as wines, meats, vegetables etc.), which, in an ever more globalized world, helps to differentiate Spanish production linking it with the land where the products are made, and improving its international competitiveness.

Spanish cuisine's growing strength, currently at the top of the international scene, along with the millions of tourists who visit our country every year – discovering a rich and varied food culture –, have contributed to creating a very positive image of the Spanish Food and Drink Industry.

The Industry has taken advantage of the situation by penetrating foreign markets, highlighting the success of Spanish cuisine. The progressive and constant penetration of its products abroad has yielded a positive commercial balance. Spanish food and drink exports – which in 2016 reached 27.500 Mill. € - account for 11% of all Spanish exports. Spain occupies the 6<sup>th</sup> place in the European ranking of Food & drink exporters and the 10th worldwide.

The most sought-after products abroad are, in the following order: pork meat products (16%), olive oil (12.2%) fish products and fish preserves (10.6%), and wine (9.9 %). These are followed by vegetable preserves, confectionery and sweets, dairy products, olives, meat products and other vegetable oils. The primary destination for these products are the EU – with France, Italy and Portugal at the top, taking in 66.6% of our exports – the USA, China and Japan.

The high level of investment in R&D, processing technology, as well as food traceability and safety have positioned Spain's food and agriculture sectors as one of Europe's foremost

Some of the aspects which position us as one of Europe's foremost food and agriculture sectors are the high level of investment in research, development and innovation, the investment in processing technology, and food traceability and safety. Life sciences and technology have brought about new manufacturing and conservation processes that are giving longer shelf life and availability to food produced in Spain.

The Spanish industry reacts quickly to new market trends. In the face of consumer's growing concerns about health and nutrition, the Industry has reduced the amount of salt, sugar and fat in its products, has launched light versions of its products and has developed new organic ranges as well as ranges that cater for people with specific nutritional problems (allergies, intolerances etc.).

Spanish companies seek to find the balance between efficiency, animal welfare, society's needs and caring for the environment; efficiently managing energy and water resources, and doing their best to keep air and water pollution to a minimum.

# A journey through the regions of Spain: gastronomy, food and tourism

In Spain gastronomy, nutrition and tourism are closely interlinked. Spanish gastronomy has always had a playful role, which goes beyond its merely nutritious function and spills into the social sphere of sharing – with friends, colleagues or family – in a fun and cheerful context. Furthermore, the Spanish diet is part of the Mediterranean diet, offering a great range of products whose quality is recognized worldwide, and is becoming more so every day. On the other hand, the recent development of highly creative and innovative, cutting-edge cuisine, has raised the interest of millions of gourmets around the globe. If to this we add the attractive tourist options our country has to offer thanks to its privileged geographical position, climate, year-round sunshine and guaranteed fun, the result is a significant flow of gastronomic tourism, which grows year after year.

The gastronomy sector is crucial to the Spanish economy, as it accounts for 25% of GDP. Both the food and tourist sectors have remained strong and even grown in spite of the financial crisis. Specifically, the Food and Drink Industry, grossing €96.4 Bill. in 2016, has experienced some of the biggest growths of the EU.

Some figures will suffice to prove our county's position as world food power. Spain is the number 1 producer and exporter of olive oil and olives in the world and the 3<sup>rd</sup> wine producer. It holds 1<sup>st</sup> place as fish producer in the EU and

the 2<sup>nd</sup> as pork meat producer. Its exports have more than doubled over the past 15 years and in 2016 they accounted for 18.4% of the total exports of the Spanish economy. One of the reasons for this success is the increase in the quality of its food and agricultural products over the past years, whose perception has improved exponentially. Evidence supporting this is the fact that there are currently 347 types of food and drinks with a quality guarantee specific to their origin or way of production.

Spanish gastronomy has one of the best reputations on the international scene. In a short lapse of time it has gone from being a great unknown to reaching the first positions in the international ranking. Proof of this is that 3 out of the 10 best restaurants in the world in 2017 were Spanish: El Celler de Can Roca, Asador Etxebarri and Mugaritz. In this sense Spain is the only country in the world to place 3 of its chefs on this exclusive podium. In 2018 the prestigious Michelin Guide awarded 195 restaurants in Spain its coveted stars. 11 of them got three stars, 25 obtained two stars and 159 one star. San Sebastián (Basque country) holds the 2<sup>nd</sup> place worldwide in terms of Michelin stars per capita, only after Kyoto (Japan).

Nowadays Spanish cuisine is considered one of the most imaginative and original ones in the world thanks to the audacity of a handful of chefs who have known how to combine traditional elements with the most daring and groundbreaking creations. Spearheading this movement is





Ferrán Adrià, whose restaurant, el Bullí was named the best restaurant on the world for 4 years running (2006-2009).

Following that success is the restaurant El Celler de Can Roca, run by the three Roca brothers, which between 2011 and 2017 was named best restaurant in the Word twice, 2<sup>nd</sup> best 4 times, and 3<sup>rd</sup> best restaurant once. In 2016 the three brothers were named best chef, best pastry chef and best sommelier in the world in 2016 respectively. The key to these chefs' success is their ability to exploit the great variety and richness of our cuisine and food products bringing it up to date and taking it to surprising and unsuspected heights.

Our gastronomy, which is based on the duality of raw material/product, traditions/innovation and prestige/creativity, has a great importance in the Spanish economy and social life through the restaurant business, a sector that grossed almost €35,131 Mill in 2016. Another significant figure of Spanish gastronomy are the sector's 300,000 establishments, shared between restaurants, bars and catering companies. A fun fact is that Spain is the 1st country in the world in terms of bars per capita: 175.

Spain has been a favorite holiday destination for years. In 2017 it held the 2nd place worldwide with a record number of over 82 million visitors a year, yielding a revenue of €60.3 billion. What is new is that the number of international tourists who come to Spain for the food keeps growing. In 2017, 10 million tourists travelled to Spain for gastronomic reasons. What tourists seek when they come to Spain is a unique holistic experience. What is fascinating about Spanish gastronomy is the great diversity of products and recipes and the manners of preparation. They also look for

Those who visit Spain will be surprised by the richness and diversity of our dishes, which vary dramatically from one tip of the country to the other

pleasant treatment, and a fun, relaxed and comfortable environment.

In Spain any excuse is good to go out for tapas or to have lunch or dinner with your friends. Any celebration comes with abundant and delicious feasts and all kinds of drinks. Those who visit Spain will be surprised by the richness and diversity of our dishes, which vary dramatically from one tip of the country to the other. Each region, each province, and almost every town has its own culinary specialty. This is due to the great variety of climates, terrains, altitudes and seas it is blessed with. And, of course it is thanks to the legacy of the countless peoples and cultures, which have inhabited it and do so to this day.

On the other hand, creativity is nothing new and has always been one of the calling cards of Spanish gastronomy. Mayonnaise, for instance, is a Spanish invention, native to Mahón (Balearic Islands) and adopted with great success

by the Napoleonic troops. And it was also a Spaniard who invented puff pastry in the 17th century, today the indispensable base of confectionery. The world famous *flan* and *churros* are also Spanish creations.

One of the most representative elements of our gastronomy is *tapas*, small portions of food which are served in bars to accompany drinks. Apparently, they originated in Andalucía, where the barkeepers used to cover the sherry glasses with a slice of ham or *chorizo*. They have not lost their popularity over the centuries, quite the contrary in fact, and have become a way of eating which has caught on all over the world through the exportation of *tapas* bars. *Tapas* can be a simple morsel to accompany a good glass of sherry or a beer as in Andalucía, or bigger dishes, as in the center of the Peninsula. In the north and especially in the Basque country, La Rioja and Santander they have become an art form. There they are called *pinchos*, and they are different from all others in Spain in that they are delicacies held together with a piece of bread by a toothpick. Going for *tapas* transcends nutrition. It is a way of socializing, of meeting up with friends for drinks and enjoying some of the most typical products our gastronomy has to offer.

One cannot actually talk about a unique Spanish gastronomy as such. Each region, depending on its products, climate and the character of its people, has its own. We could say that Spanish gastronomy is made up of the 17 autonomous regions that constitute our country.

Although there are many differences between regions, one of the culinary specialties adopted by the whole country, and without a doubt the most archetypal, is Spanish *tortilla* (potato omelet). It is eaten as an appetizer, tapa, lunch or

dinner, and no picnic would be complete without one. It also allows for many variations, such as the Santanderinas which include sauces, salads, ham, etc. or the Sacromonte *tortilla*, created by the gypsies of Granada.

Depending on its gastronomic uses, Spain can be divided into four great regions: the East with its rice dishes, the South with its fried foods, the North with its stews and the center with its oven baked dishes. The climate, the proximity to the sea, and the access to irrigation are the main factors that have shaped Spain's gastronomic production, not to mention its millenary habits and customs.

The sunny east coast is the country's greenhouse. Located right next to the Mediterranean, the regions of Valencia and Murcia are renown for their light and mild climate. So much so that they have become one of the tourist hotspots of Spain, attracting millions of people every year. Its success is due, not only to its guaranteed sunshine, magnificent beaches and the many wonders this land, studded with almond, orange and fruit trees has to offer, but also to its cuisine.

The Arabs, apart from developing an ingenious irrigation system, which turned the Spanish East coast into an orchard, brought rice farming to Spain in the 8th century. Here rice is prepared in a thousand different ways (*paella*, *arroz caldoso*, *arroz a banda*, etc.). It's amazing to see how people from Valencia turned paella, a dish of humble rural origins, into the "Spanish" dish par excellence. Its popularity has exceeded our borders and *paella* can be found in many restaurants abroad. On the other hand, almond-based sweets like *turrón* (nougat) are also extremely popular both nationally and abroad.

Andalucía, the southernmost region, boasts an enormous historical and cultural heritage rooted in its Arab past. Some of its most famous symbols, such as the Alhambra - the majestic oriental palace that seems to come right out of The Thousand and one Nights -, Seville, bullfighting and flamenco, as well as its whitewashed towns, spectacular religious celebrations, beautiful beaches and sunny climate, have turned it into a huge attraction for international tourism.

A journey through these lands will delight the visitor with seas of olive groves so it should come as no surprise that fried food is one of its specialties. Two of its distinguishing hallmarks are *pescaíto frito* (small morsels of battered fish) and cold soups, like *gazpacho* - another one of Spain's best-known dishes worldwide - *ajoblanco* or Cordoba's *salmorejo*. Jerez, (whose name, too difficult to pronounce for Anglophones, lent its name to Sherry) and its fortified wines is another focal point for visitors. Its peculiar screed ageing method has yielded one of the most extraordinary wines in the world known for its great character.

The West of the Peninsula is a land of great pastures, under whose helm oak forests indigenous cattle and pigs graze. The region of Extremadura, bordering with Portugal, is where some of the great conquistadores came from and the chosen place for retirement for Emperor Charles I of Spain and V of Germany. The city of Mérida, with its roman theatre, one of the best preserved in the world, or the monumental cities of Cáceres and Trujillo are some of its attractions. Some of its shining gastronomic standards are *pimentón* (paprika powder), pork products and some of the most sophisticated cheeses in Spain, such as *torta del Casar* or *torta de la Serena*. South of Extremadura is the Andalusian

One cannot actually talk about a unique Spanish gastronomy as such. Each region, depending on its products, climate and the personality of its people, has its own cuisine

province of Huelva, where some of Spain's finest cured hams come from.

The Castile *meseta*, which covers the entire central region of the country, is a huge plateau many hundreds of meters above sea level. This absence of coasts has forged its history, so during centuries it was permanently at odds with its neighbors. Hence the profusion of castles scattered all across its territory. Some of its attractions are the impressive gothic cathedrals and towns like Toledo, the ancient imperial capital, or Segovia with its fairy-tale castle and imposing roman aqueduct dominating the city.

Its extreme climate (cold winters and torrid summers) and scorched land have led the two Castiles to specialize in grain farming, setting aside vast tracts of land for this crop. The livestock that is best suited to this climate are sheep and



goats, so that oven-baked suckling lamb or goat are worth a detour, as is suckling pig, a dish for which Segovia is famous. Manchego cheese, Alcarria honey, Burgos black pudding (blood sausage), the renowned Ribera del Duero wines or Toledo marzipan are some of its gastronomic hallmarks.

In the middle of Castile lies Madrid, which boasts a first-class cultural offer, especially its famous “Art walk” comprising of the Prado, the Thyssen and the Reina Sofía museums. It is renowned for its busy nightlife and its restaurants. Its archetypal dish is *cocido*, which combines different types of meat, vegetables and chickpeas and actually consists of a three-course meal rather than a single dish.

Galicia and the Cantabrian coast are a world apart both in climate and character. Here there was hardly any Arab presence, so the culture is far more rooted in Celtic and Normand origins than the rest of Spain. One of its nerve centers is Santiago de Compostela, town of medieval origin and destination of pilgrims who, for centuries, have walked the path of the Camino de Santiago. San Sebastián (Basque Country), in whose old town one can enjoy some of the finest *pinchos* in Spain, also boasts one of the most beautiful urban beaches in the country.

Abundant rain and pastures have encouraged the development of a powerful meat and dairy industry, some of the greatest representatives of which are Galician Beef and Cabrales cheese. Galicia and the entire Cantabrian coast have historically lived looking out at sea, reaping exquisite fish and seafood from its waters. Most of Galician specialties are seafood, which are simply boiled in water, or at most have a dash of olive oil, such is the case of a feira style octopus whose only condiment is a sprinkle

Galicia and the Cantabrian coast are a world apart since there was hardly any Arab presence, hence the culture is far more rooted in Celtic and Normand origins than the rest of Spain

of *pimentón* (paprika powder). Galician canned fish have become famous abroad, as have anchovies from Santander.

On the Cantabrian Sea, dishes are more sophisticated, with stews such as Asturian *fabada*, *cocido montañés* from Santander, or the hake or cod stew for which the Basques are famous. It was precisely in the Basque Country where the real Spanish gastronomic revolution began, and where a great number of chefs who have been awarded Michelin stars are found.

South of the Basque Country lies La Rioja, land of many religious monuments and considered the cradle of the Castellan language. Apart from its obvious historical and artistic attractions, La Rioja is renown for its excellent wines, which spearheaded Spanish wines for years. Although they have been considered some of the best wines in existence,

the wine growers of this region constantly surprise the world year after year with their excellent quality.

At the northeastern end of the Peninsula lies Cataluña, an autonomous region with idiosyncrasies all of its own. It enjoys a privileged location, combining the beach with the Pyrenees, and medieval monuments with exquisite modernist gems. It also treasures invaluable works by Gaudí, Picasso and Dalí. The Barcelona Olympics were the springboard that launched Barcelona as one of the world capitals of modernity and design. Because of all this, of its Mediterranean climate, and ever increasingly because of its cuisine, the flow of tourist never ceases.

The evolution that Catalan cuisine has experienced lately has been spectacular. It has produced chefs of the stature of Ferrán Adrià, Joan Roca or Carme Ruscalleda (the only woman in the world to hold seven Michelin stars), just to mention a few. Its culinary tradition includes simple dishes such as bread and tomato, which has become rooted all throughout Spain; vegetarian dishes like *escalibada* or *calçots*; or more sophisticated ones like seafood *zarzuela* or fish soups known as *suquets*. All of this accompanied by some of the most international wines such as Penedès or Catalan cava, which rivals French Champagne.

Navarra is world famous for the spectacular running of the bulls of San Fermín, when thousands of young people gather to run in front of wild bulls through the streets of Pamplona. The rest of the year people from Navarra enjoy top quality products such as asparagus, chorizo, cheese and vegetables; and drink Somontano or local rosé wines. Nearby Aragón, one of Spain's great kingdoms has magnificent natural landscapes. Here some of Spain's most impressive settings can be found,

such as the Ordesa Natural Park or the Pyrenees, making it one of the best destinations for skiing. Apart from Aragón trout, the region is known for Teruel cured ham, its cheeses, vegetables or comfit fruit dipped in chocolate.

And finally we have the islands. The Balearic Islands have become a magnet for travelers worldwide, especially the whitewashed Ibiza, famous for its carefree atmosphere and huge nightclubs. Mallorca, an old time refuge for artists such as Chopin, boasts great beaches, the ancient city of Palma and quaint little towns. Off the shores of Africa rise the Canary Islands, with a climate so mild that they have become the favorite spot for millions of European holiday-makers. These volcanic islands offer truly spectacular landscapes dotted with dormant volcanos and splashed with lava of all colors. Both Archipelagos have developed a very unique gastronomy. Some of the highlights of the Balearic Islands are *sobrasada* (a kind of *chorizo* paté) and *ensaimada* (a very light pastry). The Canary Islands are well known for their cheeses, Malvasía sweet wines grown on volcanic soil, and *papas con mojo* (potatoes boiled in salty water until the water evaporates leaving a salty crust on the skin, served with a hot, spicy sauce).

And after this brief journey through the landscapes, flavors and dishes of Spain, the only thing left to say is that the Spanish Food Industry, through its prepared and packaged products, hopes to preserve our traditional foods making them accessible both to those who live in our country and to those who want to enjoy their tastes overseas. Obviously to truly get to know the treasures which Spain has to offer the best thing to do is to come and visit, discover it, live it and savor any of its countless specialties under its light and sunshine.



# Olives & Olive Oil



# Olives & olive oil

live farming began over 5000 years ago in the Middle East, and Greek mythology told of how, with her spear, the goddess Palas Atenea gave birth to the olive tree. Although olives were initially used to extract oil, references from the 1<sup>st</sup> century B.C. also mention their direct consumption.

Phoenicians and Greeks introduced olives to the Iberian Peninsula, while Romans extended their farming and improved oil production techniques. Hispania was the Empire's primary oil producer, and its oils were considered of the highest quality. The Arabs perfected oil extraction and, during the 16<sup>th</sup>-17<sup>th</sup> centuries, it was the Spaniards who brought olive trees to the American continent.

The olive tree requires plenty of sunlight, mild winters, warm, dry summers and rain during the rest of seasons. It grows very slowly, not yielding fruit until at least 5-10 years after its plantation, reaching maturity at 20 and attaining its splendour between 35 and 100-150 years of age.

Harvesting, known as “*el verdeo*”, takes place in the months of September, October and November. In order not to damage this delicate fruit, the most sensitive varieties are still picked by hand. Depending on the time of harvesting and the ensuing preparation process, there are 3 types of olives: green, black and those of turning colour (purple, pink...). After processing them to make them edible (olives are the only fruit which cannot be eaten straight from the

tree), they can be dressed in brine, Spanish style, with garlic and herbs, etc.

There are over 80 different kinds of stuffings, the most popular of which are anchovy, pepper, almond, etc. Of all the different kinds of olives Spain produces, sliced (29%) and stuffed olives (27%) are the ones with the highest international market demand. Spain also has the widest range of varieties: Manzanilla, Hojiblanca, Gordal, Cacereña, Carrasqueña, Verdial, Picual, etc.

The real development of the table olive sector began at the end of the 19<sup>th</sup> century in Seville. Since then, Spain has been the international market leader in terms of production volume, transformation, sales and export. The sector generates 8,000 direct jobs, and 6 million days of field labour are needed for harvesting and farming the olives. The sector's contribution to Spain's GDP is in the range of 1,000 Mill. Euros.

There are around 155,000 Has. of olive groves reserved for table olives, most of them in Andalucía (85%). With an average production of 530,000 T over the past 5 years, Spain remains the 1<sup>st</sup> table olive producer in the world (21% of the total).

Spain is, by far, the first exporter of table olives worldwide. In 2017 exports to over 150 countries amounted to 308,374 tons (737.2 Mill. Euros). Their main destination is the USA, (23%).

The variety of flavours and aromas of different olive oils is due to the diversity of climates, orography and soil existing in Spain, something which does not occur in any other producing country. We also need to factor in the over 260 varieties of olives, among which the Picual – which accounts for 50% of olive farming in Spain - Cornicabra, Hojiblanca, Arbequina, Verdial and Picudo stand out. The result is an extremely diverse range of olive oils with very different sensory characteristics. But they all share a fruity and intense fragrance.

Olive harvesting can be performed manually, hitting the tree with long poles, or using machinery which shakes the tree to release its fruit. Then the olives are taken to the mill for processing during the 24 hours following their harvest. Only this way can prime quality oil be obtained.

In the modern oil extraction process, olives are pressed into a paste. 1 litre of water is added to each Kg of paste and a horizontal centrifuge separates the oily juice from the solid matter. The juice is then placed inside a vertical centrifuge that separates the oil from the water. During the process temperatures cannot exceed 35°C. Between 4-5 Kg of olives are necessary to make 1 litre of olive oil.

The olive oil is then stored in stainless steel or glass-tiled tanks until its sale. To let the oil mature and prevent oxidization it is kept between 15°C-18°C, avoiding any

exposure to light. Unlike the extraction of other vegetable seed oils, which requires solvents for their manufacture, the production process of olive oil is completely natural.

The main olive oils on sale are extra virgin olive oil (max. acidity 0.8°); virgin olive oil (2°) and olive oil (3°). Unlike wine, olive oil does not improve with time, so its consumption is recommended during the same year of production.

Currently Spain is the number 1 olive oil producer in the world. The farmed area (over 300 Mill. olive trees across an area larger than 2 Mill. Has.) accounts for 25% of all the olive farming surface worldwide. Its average annual production is 1.2 Mill. T, reaching 1.8 Mill T during recent campaigns. Andalucía produces 80% of all olive oil in Spain.

Furthermore, Spain is the number 1 exporter worldwide, reaching over 170 countries. In the past 10 years we have exported a yearly average in excess of 700,000 T, reaching as much as 1.1 Mill T in some campaigns. This is due to our oils' outstanding quality, subject to the strictest controls. There are currently 9 extra virgin olive oil Protected Designations of Origin, and at least 6 other ones in the process of being recognized.



# Aceites La Española

With internationalization as a flag

**L**a Española is the image of Spain as a brand. It represents a sector in which we are world leaders and it transmits our cultural values through the brand's name and the image of a Spanish woman in the olive groves on the label.

Our respect for tradition is in no way incompatible with innovation being a trademark of La Española oils, where day after day we develop new top quality, healthier, more sustainable products, adapted to each market's characteristics. This dedication and personalization has led us to be present in 110 countries, and market leader in 30 of them.

Aceites La Española is the most innovative company in the oil sector, having launched over 20 innovative product ranges over the past 15 years. We pioneered enriched and functional oils, aromatic oils, extra virgin and single-variety oils as well as exclusive sauces.

One out of every five bottles of olive oil sold in Spain is from Acesur, the group to which La Española belongs, leading the market share in all categories of olive oil and boasting a 23% increase compared to the previous year. In foreign markets, La Española also consolidated its position as the leading Spanish exporter, with 80% olive oil.

Acesur leads the sales of all olive oil grades in Spain and is also consolidated as the leading Spanish olive oil exporter





In 2017, the most noteworthy sales growth have been in the United States (24.6%), Japan (42.2%), France (71%), Norway (140%), and the United Kingdom (14%).

With over 177 years' experience, La Española has become an expert in the olive grove's complete management cycle. This can be seen in everything we do: the 7 plants distributed across Andalucía and Castile, which include milling, refining, bottling and marketing olive oil. Our comprehensive management also shows in the extraction and preparation of vegetable oils, notably sunflower oil, or the production and distribution of vinegars, mayonnaises, sauces and dressings.

Acesur is the unquestioned leader in its sector – through its division Enersur –, in its industrial activities in the management of residues coming from the olive groves, biomass production, cogeneration or production of biodiesel.

The international market accounts for approximately 45% of our revenue. Our ever-increasing worldwide presence has led our international structure to grow considerably over the past years with 3 storehouses in the United States and as many shared between the Czech Republic, the United Kingdom and Lithuania. We also have commercial offices in China, Portugal, Brazil, the United Kingdom and the United States.

It is important to highlight that La Española has established itself as the Spanish oil company with the highest sales in Latin America, achieving a privileged position in over half of the continent's countries such as Colombia, Paraguay, Peru, Ecuador or Brazil. Furthermore, La Española has a very relevant presence in as far-flung places with such high growth perspectives as New Zealand, China, Saudi Arabia or India.



**Founded in:** 1840

**Productive capacity:** Volume of oils and sauces sold (2017): 175 Mill. litres (over 200 Mill. units/packs/ bottles sold). Annual refinement capacity: 200.000 T

**Turnover (2017):** 700 million euros

**Number of employees:** 600

**Export markets:** 110 countries among which it is worth noting USA, Brazil, Germany, Australia and Japan. Others worth mentioning are: UK, South Korea, China, Mexico, Ireland, Lithuania, Poland, Colombia, Singapore, Russia, Finland, Ecuador, Dominican Republic, Sweden, Norway, Hungary, Slovakia, Taiwan, Pakistan, New Zealand, Czech Republic, Iraq, Iran, Philippines, Indonesia and Panama

**Products:** Extra Virgin Olive Oil, olive oil, olive pomace oil, sunflower oil, grape pip oil, corn oil, soya oil, blended, sauces, mayonnaise, condiments and vinegars

**Brands:** La Española

**Certificates:** BRC, IFS, OHSAS 18001, ISO 9001, ISO 14001, Kosher, AEO, Halal

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# Aceites Valderrama

Environmentally friendly organic oils



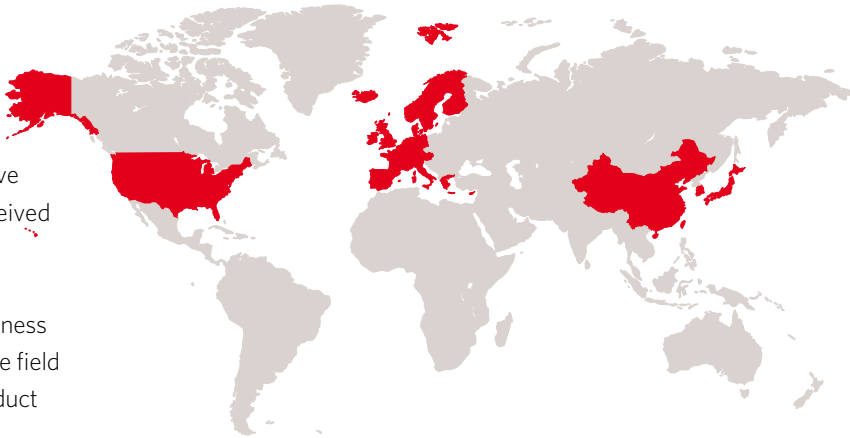
Aceites Valderrama is the brainchild of Jose I. Millan Valderrama, whose family has been growing olives for olive oil production since 1853. He spent his childhood among olive groves and, at the age of 25, turned his hand to computer science. He became director of a German company where he learned and applied three basic business concepts: enthusiasm, the passion for a job well done and constant innovation.

Applying this experience to olive cultivation with the help of a passionate team of motivated people gave rise to the range of Valderrama extra virgin olive oils now found at the best tables across the globe. Proof of this are the many testimonials from distinguished restaurants including over 90 Michelin star restaurants throughout Europe, Asia and America.

Such renowned media as the Washington Post in the USA and Japan's famous culinary magazine CHEF91 have sung the praises of Valderrama extra virgin olive oils. For the past three consecutive years, the New York International Olive Oil Competition awarded Valderrama the gold award for its organic olive oil. Valderrama's new line of organic olive oils also received awards at Biofach, the largest organic food fair.

Valderrama olive oils are unmistakable for their smoothness and aroma, which carefully preserves the memory of the field and fruit in the bottle; for the natural freshness of a product

Our philosophy is to produce extra-virgin olive oils of the highest quality: fresh, mild, elegant and aromatic year after year





very cold-pressed at 19°C/66,2°F just one hour after picking; and for its delicate, smooth, clean and balanced aroma whose long finish enhances the flavour of any food.

Valderrama's core belief and mission is to produce the highest quality extra virgin olive oils year after year. To accomplish this, it is essential that the oil be produced from healthy olives at their optimum ripening point, and that they come from our fully proprietary olive farms in Cordoba (370 acres) and Toledo (425 acres), agriculture-friendly environments where we use organic farming methods in conjunction with the most modern water, energy and fertilizer optimization techniques.

Consequently, part of our production is fully certified organic. We grow 6 varieties of olives at our farms: Arbequina, Hojiblanca, Picudo, Ocal, Picual and Cornicabra. Our single varietal oils are produced from these olives and are cold pressed at 19°C/66.2°F less than an hour after the olives are picked in order to guarantee very fresh, smooth, and aromatic olive oils.

To ensure the maximum quality of each of the oils, we have a sophisticated laboratory, where, in addition to measuring acidity, peroxide values, etc., we also analyze and track polyphenols and fatty acids using gas liquid chromatography, measure bitterness with a UV spectrometer, and aroma with an electronic nose. These parameters are constantly evaluated during the process to change the factory settings and ensure the best aroma and flavour from each variety can yield.

We design our single varietal olive oils at Valderrama to fit every food and culinary use, especially salads, fish, pasta, and grilled or fried meat. In 2017 a new family of Oriental



**Founded in:** 2002

**Productive capacity:** 350 T

**Number of employees:** 20

**Export markets:** USA, Japan, UK, China, Holland, Germany, South Korea, Sweden, Belgium

**Products:** Extra Virgin Olive Oil. Single varietals: Arbequina, Hojiblanca, Picudo, Ocal, Picual and Cornicabra. Organic extra virgin olive oils. Oriental flavour Olive Oils, Smoked olive oil. Natural Truffle oil and Sherry vinegar

**Brands:** Valderrama, Don Millan and Oleum del Molino

**Certificates:** IFS, BRC Y FDA and full Organic production Certification.

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Natural flavours Olive oil was introduced. They are made from 6 different Asian vegetables macerated in extra virgin olive oil without any additive, preservative or chemical added. All natural flavours and aromas.



## Agro Sevilla

The World's leading Co-operative in table olives



Agro Sevilla was established in 1977 as a cooperative. Since our beginning, at Agro Sevilla we have focused on the international market; over the years, we have become the world's leading exporter of table olives, marketing our products to over 70 countries with a leading position in most of them, and have grown to be one of the main olive oil exporters in Spain.

As a cooperative made up of primary farming cooperatives, at Agro Sevilla we are able to monitor each and every manufacturing stage of our olives and olive oil: from tending the olive trees and harvesting the olives through to manufacturing, distributing, and marketing the packaged product, thereby ensuring rigorous traceability and a strict quality control during each stage of the value chain, from the source to the final destination.

Agro Sevilla is currently made up of 12 table olive cooperatives and more than 4,000 associated olive growers with an annual production of over 80,000 tons of olives. In 2017, Agro Sevilla reached an overall turnover in excess of 173 million Euros.

Our manufacturing plants are equipped with the most advanced technology. In our industry we are pioneers in environmental matters, having implemented the HACCP control system and ISO 14001 quality certificate. Our competitive advantages are traceability – from farming

As a cooperative made up of primary farming cooperatives, at Agro Sevilla we are able to monitor each and every manufacturing stage of our olives and olive oil





to marketing –, integrated strategy, through joint working teams that ensure standard olive quality, and quality control labs throughout the whole manufacturing process. We also have other quality certifications such as BRC Food Certificate, IFS Food, OHSAS 18001, Kosher and Halal.

Our group's entire activity is focused on customer service. Our goal is to supply our international customers and consumers with the best olives produced by our olive farmers.

Our mission is to ensure that the annual productions of our olive growers are marketed at a fair price, in order to guarantee the future of the olive industry for the following generations.

**Founded in:** 1977  
**Productive capacity:** 80.000 T  
**Number of employees:** 450 employees and 4,000 associated farmers  
**Export markets:** Over 70 countries including, USA, Germany, Australia, Brazil, China, Italy, Japan, Kuwait, Latvia, Mexico, Norway, India, Pakistan, Poland, Portugal, Qatar, United Kingdom, Czech Republic, Russia, Switzerland, Ukraine...  
**Products:** Green and black table olives (whole, pitted, sliced, stuffed). Olive oil, Extra virgin olive oil, olive pomace oil  
**Brands:** Coopoliva, Agro Sevilla, Seville Premium, Olicoop  
**Certificates:** ISO 14.001, BRC, IFS, OHSAS 18001, Kosher, Halal  
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## Angel Camacho Alimentación

Adding flavour to your life



This Spanish family business has a history spanning over 120 years (since 1897) and produces & markets an extensive range of fine foods from the Mediterranean and other parts of the world.

Its product categories – olives, olive oils, jams, pickles, seasonings and teas – are marketed under the company's flagship brands Fragata, Loreto, La Vieja Fábrica and Susarón, as well as packed under private labels.

With sales to over 95 countries and an annual production of over 60,000 T of table olives, the business group, with corporate offices in Morón (Seville) and subsidiaries in Spain, the USA, the UK and Poland, is one of the leading global table olive industry players and offers complete programs for retail and foodservice, as well as for the food industry.

Through its policy of corporate social responsibility (CSR), ANGEL CAMACHO is contributing actively and voluntarily to social improvement, generating prosperity in the community.

In 2013 the company joined the United Nations Global Compact contributing actively and voluntarily to the implementation of its 10 principles in the areas of human rights, labour, the environment and the fight against corruption. In 2015, it also joined the Water Mandate, which aims to solve the issue of global sustainability.

Our production facilities, considered state of the art within the table olive industry, guarantee an extremely high product quality thanks to the application of the latest processing and packing techniques





With cutting edge processing & warehouse facilities, located in Spain and Poland, and high-speed production lines, the specialty foods are packed in virtually any configuration the customer requires: from the smallest retail jar to larger packaging for foodservice, catering or the food industry.

The different production facilities, considered “state of the art” within the table olive industry, guarantee an extremely high quality product thanks to the application of the latest processing & packing techniques.

The ISO, BRC, IFS and other certifications certify that the quality guarantee systems implemented by the Company comply with the conditions specified by international standards.

ANGEL CAMACHO holds the ISO 14001-2004 BVQi & EMAS certifications and places emphasis on waste reduction and recycling of resources. As such, the Company operates the only processing plants in the table olive industry with zero waste. Its plantations (olive groves) absorb the CO2 generated by the combustion of biomass (olive stones or pits) used in the facilities, resulting in zero net emissions of CO2.

The Company also calculates the carbon and water footprint of its olives and preserves packed in glass jars. In 2016, ANGEL CAMACHO presented its second Sustainability Report, prepared following the guidelines of Global Reporting Initiative.



**Founded in:** 1897  
**Productive capacity:** 60,000 T of olives  
**Number of employees:** 800  
**Export markets:** More than 95 countries including: USA, Canada, EU, Eastern European countries, South America and Central America, Brazil, Russia, India, China, Japan, Philippines, Singapore, Australia, South Africa, etc.  
**Products:** Olives, olive oil, pickled vegetables, seasonings, jams, sweeteners, herbal teas  
**Brands:** Fragata, La Vieja Fábrica, Loreto, Susarón  
**Certificates:** IFS, BRC, ISO  
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## Goya® Olives

If it's Goya...it has to be good!



We only pack the best two varieties, known as Manzanilla and Queen. With a smooth texture on the outside and meaty pulp inside, Goya green olives' exquisite taste will surprise you. The rigorous specifications that we establish here at Goya en España when selecting only top-quality olives, make them the most select olives in existence on the market.

To prevent any damage to the fruit, Goya green olives are hand-picked in the veraison stage, at the beginning of their ripening period (between September and October). The olives cannot be eaten directly from the tree, so they first undergo a treatment to soften their bitterness.

Then, we store them in brine. At that moment, freshly-harvested and rich in sugars, they begin a natural process during which they start to produce oil, giving the olive its authentic flavour. This process is referred to as "Seville Style".

We continue working with the same recipe we used when we opened our first factory in Spain in 1974. Goya olives' quality is endorsed by international quality label institutions such as ChefsBest, Laur Konsumenta or iTQi

Now, they are ready for packaging. Among the different kinds of Goya green olives, we have the Gordal variety, large and heart-shaped, available both pitted and stuffed. The

We continue working with the same recipe we used when we opened our first factory in Spain in 1974. Goya olives' quality is endorsed by international quality label institutions such as ChefsBest, Laur Konsumenta or iTQi





smaller Manzanilla variety Goya green olive, characteristic of Sevillian olive groves, is a generous and tasty olive.

Everyone wins with Goya: we offer quality at a fair price to our consumers and we look after the interests of our distributors. We work closely with them in foreign markets to build our brand and ensure a common growth.

After they are picked and selected with the greatest care, our Goya olives pass through a process that involves the latest technology in the industry to preserve the original flavour and texture. Their ingredients exclude any additive except for those naturally produced in the olives pickling preparation.



**Founded in:** 1974

**Productive capacity:** 17 million jars of olives in 2017

**Number of employees:** 27

**Export markets:** Australia, China, Dominican Republic, Ecuador, El Salvador, Honduras, Japan, Korea, Nicaragua, Nigeria, Poland, Puerto Rico, Republic of the Congo, United Kingdom, USA, etc.

**Products:** Our product lines include the varieties of Goya Manzanilla and Queen Olives, black and green table olives and their preparations: plain olives, pitted, sliced, stuffed with: pimento, jalapeño, hot pepper, tuna fish, anchovies, smoked salmon and blue cheese pastes, reduced sodium olives, alcaparrado, salad olives, and capers

**Brands:** Goya

**Certificates:** BRC "Grade AA", IFS V6 "Higher level", ISO 9001-2008, HACCP, C-TPAT

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www.goyaspain.com

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# Goya® Olive Oils

If it's Goya...it has to be good!



With a proven track record of over 40 years in the city of Seville, Goya en España is a leading company in exports of olive oil, table olives and capers.

From its modern headquarters, located in the heart of the biggest olives and olive oil production center in the world, Goya en España exports to the five continents.

It all begins in the olive groves, where the main ingredient for our delicacies comes from. Our olives are harvested following a great tradition of Mediterranean flavours.

Our respect for age-old wisdom, along with the importance we place on innovation, can be enjoyed in each of our products. That is why we still work with the same recipe we used when we opened our first factory in Spain in 1974.

Goya olive oils, have been named by consumer associations as "Best buy", winning several gold medals in international contests, and are also backed by international quality label institutions such as ChefsBest, NAOOA, Laur Konsumenta, iTQi.

Consumers rely on our dependability. Part of the Goya family, the largest Hispanic food company in the United States, we believe in excellence. We have achieved this

Goya "Único" and Goya "Organics" have been awarded "Extra Virgin Olive Oils of the year 2017" by the EVOO World Ranking. Goya extra virgin olive oils received 16 awards in international competitions





reliability through the dedication of our employees, from the executives to the workers.

Goya en España, S.A.U. was created in 1974 by Antonio Unanue to ensure the best olive and olive oil production and packaging in the world. Our exports volume has placed us among the largest exporters of these products from Spain according to ASEMESA and ASOLIVA.

Everyone wins with Goya: we offer quality at a fair price to our consumers and we look after the interests of our distributors. We work closely with them in foreign markets in order to build our brand and ensure our common growth.

Goya extra virgin olive oil is prepared with an eye for detail. Each stage in its production goes through a strict quality control process, including the selection and filtering of extra virgin olive oil. To ensure its consistency, our professional team tastes over 2000 samples representing lots that come from the finest stock of our Spanish suppliers. Of these, they select under 100 lots that eventually become the unique *coupage* from which Goya's extra virgin olive oil is made. The final product is known for its brilliant colour, and an aroma that transports the consumer to the fields of Andalusia.

We recently launched our Goya gazpacho, Goya vinegars and Goya organic extra virgin olive oil, and in 2017 we also launched Goya olives stuffed with blue cheese, fulfilling our vocation of bringing Spain flavours to the world.



**Founded in:** 1974

**Productive capacity:** Olive oil: 15 Mill. bottles in 2017.

Vinegars: Product in launching phase. No statistics available.

**Number of employees:** 27

**Export markets:** Australia, China, Dominican Republic, Ecuador, El Salvador, Honduras, Japan, Korea, Nicaragua, Nigeria, Poland, Puerto Rico, Republic of Congo, United Kingdom, USA, etc.

**Products:** Goya "Único" extra virgin olive oil, Goya "Organics" extra virgin olive oil, Goya "Robust"/"Fruity" extra virgin olive oil, Goya extra virgin olive oil, Goya olive oil, Goya light flavour olive oil, Goya "Sherry" vinegar al Pedro Ximénez, Goya Sherry vinegar "Reserva" al Pedro Ximénez and Goya "Balsamic" vinegar

**Brands:** Goya

**Certificates:** BRC "Grade AA", IFS V6 "Higher level", ISO 9001-2008, HACCP, C-TPAT.

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# JOLCA

Bringing the best quality Spanish olives



For over 50 years, JOLCA has combined tradition with innovation to become one of the most renowned table olive producers in the Spanish market.

The company is located in Aljarafe, Seville, a region famous for the quality of its olives since ancient times. Pliny, in Roman times, praised the sunny hills of this area as the best for growing olives. Later, in the Middle Ages, the famous geographer Al-Idrisi said that *"the best known region for olive cultivation in Al-Andalus is the area southwest of Seville called Aljarafe"*. This tradition has continued until the present day and both the olive tree and olive are intimately connected not only to the local culture, but are also the mainstay of its economy.

JOLCA was created in 1961 by the entrepreneurial Gutierrez family who have maintained the balance between a respect for tradition (by hand-harvesting the olives), and constant innovation. The combination of the two gives rise to a wide range of quality table olives deserving the acclaim they receive in the markets where they are sold. For our customers, quality is the hallmark of our brands, but particularly of our flagship brand: JOLCA (called like the company).

Today, JOLCA is a leading brand in the Spanish market, ranking number one in categories like green olives, specialty olives, mixes and cocktails, and olives packed in pillow

For over 50 years, JOLCA has combined tradition with innovation to become a leading producer of table olives in the Spanish market with presence in many countries around the world





bags. But our products can also be found worldwide in over 40 countries. JOLCA is synonymous with the best quality Spanish olives. As an appetizer or in cooking, table olives are highly nutritious and form part of the Mediterranean diet.

It has always been the priority of our company – which has the industrial facilities to treat such distinguished and unique fruit with care – to stay close to the raw materials it works with.

We mostly process two varieties of local olives that are recognized worldwide: the Manzanilla and the Gordal from Seville. But also, many other varieties like Verdial de Huévar, Cacereña, Hojiblanca, Arbequina, Aloreña...

The combination of selecting raw materials that are suitable for the most discerning palates, a team of professional experts, modern and efficient facilities, and strict monitoring of all stages of production from the time the olives are picked, is the source of greatness that distinguishes JOLCA.

By combining the know-how of our staff, modern and efficient production facilities with over 110,000 m<sup>2</sup> of total area and scrupulous monitoring of the complete production process, we grant a full traceability from tree to package and of course a careful selection of olives to satisfy the most discerning palates. This is the root of JOLCA's greatness.

We are always looking for ways to improve and to meet customer demand. We are increasingly allocating more resources to new technologies that provide greater safety in the manufacturing process. Moreover, the distinct formats (small, medium, large), types of containers used (cans, glass, plastic bags) and variety of presentations (pitted,

**Founded in:** 1961  
**Productive capacity:** 8,000 T  
**Number of employees:** Over 100  
**Export markets:** North America, Central America, South America, the Caribbean, EU, Africa, Middle East, Asia, Russia and Ukraine  
**Products:** Table olives and pickled vegetables in cans, glass jars and plastic bags  
**Brands:** Jolca, Jolquita, Olimerca, Capellanía, Señorío del Aljarafe  
**Certificates:** ISO 9000, IFS  
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whole, stuffed with different ingredients, seasoned with spices, etc.) enable us to meet the demands of different consumer groups.

# Manzanilla Olive

El sabor de Sevilla - The taste of Sevilla



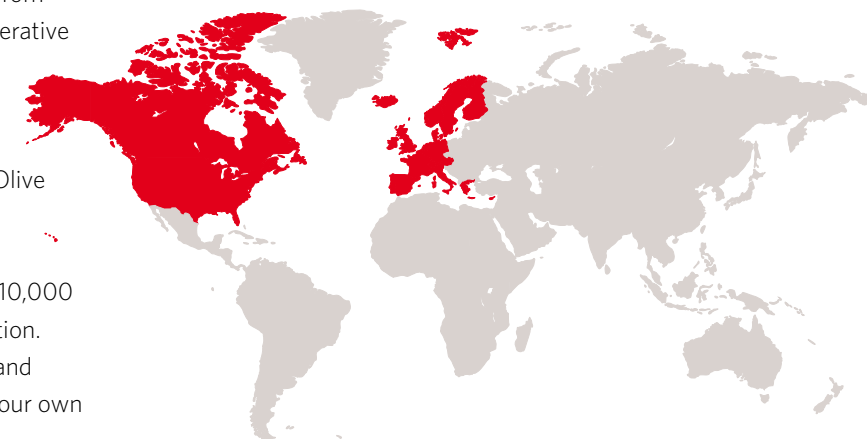
2010 was the year we started to build a common project in order to grow together. 2014 was the year we had to prove that after four years learning to live together, taking decisions and walking at the same pace, we were prepared to take on new challenges and prove our strength. 2015 was the year Manzanilla Olive became a reality.

This is a story of people who dared to change the status quo challenging the current times. Together they found the drive to overcome a great obstacle and lead a great transformation. Manzanilla Olive are the men and women of our land, day labourers, farmers, master cooks, operators, technicians, agents. People who believe in a different way of doing things, in a different future for the towns of Seville.

Manzanilla Olive is a great family of 6,000 farmers from the olive grove. A Second Degree Anonymous Cooperative with its headquarters in Utrera (Seville) made up by nine First Degree Agricultural Cooperatives from 8 municipalities from the region of Seville, that produce, pack and sell table olives and Extra Virgin Olive Oil both nationally and internationally.

Our priorities are: supply, quality and product. Over 10,000 Hectares of Olive groves guarantee our own production. We offer excellent quality products, as the national and international certifications we obtained testify. And our own

We produce pitted olives, black sliced olives, and olives with a variety of fillings and flavors, in addition to the exclusive olives that are introduced by hand one by one in glass jars



## manzanillaOlive

**Founded in:** 2010

**Productive capacity:** Table olives: over 40,000 T.  
Olive oil, approximately 10 Mill Kg.

**Number of employees:** 87

**Export markets:** EEUU, Canada, United Kingdom,  
Poland, Germany and Greece

**Products:** Table olives: whole Manzanilla, pitted,  
stuffed with pepper and stuffed with anchovy;  
whole and pitted Gordal; green or sliced black;  
whole black and pitted. Extra Virgin Olive Oil  
(Seville Manzanilla, Picual, Hojiblanca, Verdial  
and Lechín) always obtained by mechanical  
procedures

**Brands:** Manzanilla Olive and Lola. Client brand  
MDD

**Certificates:** BRC and IFS. Organic production  
certificate for table olive and Extra Virgin Olive  
Oil (in process)

**Contact:** Ángel Ignacio Abellán Hernández.

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rigorous and innovative traceability management system  
- an exercise in transparency and answerability to the  
customer - guarantees the product's origin. Thanks to it our  
clients can trace the route our olives have travelled from the  
field to the table.

Our facilities allow us to produce pitted olives, sliced black  
olives and olives with a variety of fillings and flavours, in  
addition to the exclusive olives that are introduced by hand  
one by one in glass jars. Our premises have the capacity for  
cooking 410 T. of olives in 24 hours, an oxidization capacity  
of 160 T. and storage for fermentation of 7,000 T.

Our main olive crop are the Seville Manzanilla, the most  
renown internationally and the most versatile thanks to its  
balance of flavours; the heart-shaped Seville Gordal, much  
appreciated for being so fleshy, the Morona, a traditional  
local variety from Morón de la Frontera (Seville); the  
Hojiblanca, which because of its versatility and strength is  
the most grown and the one that receives R&D's closest  
attention in Seville's sector; and the Verdial de Huévar,  
which is an echo of the past since its trees were used as a  
blueprint for new varieties.

At Manzanilla Olive we not only make the most of Seville's  
traditional table olives, but we also focus on Olive oil  
production. Our oil is bottled at the presses of our base  
cooperatives.

Our Olive oil is obtained by mechanical procedures. For  
this we use numerous varieties of olives: Seville Manzanilla,  
Picual, Hojiblanca, Verdial and Lechín. The result is a  
superior quality extra virgin olive oil. It has an excellent  
aroma and flavour and its acidity is below 0.80°.

# Jamón & meat products



# Jamón & meat products

Meat is by far the most consumed food in Spain. This is due to the great offer, variety and quality of the products the sector can provide. The meat industry is the 4<sup>th</sup> most important industrial sector in Spain after automobiles, petrol and energy. Its weight in the economy is considerable: with a business worth 28,998 Mill. €, it accounts for 22.3% of the food industry revenue and brings 2.2% of the GDP and 14% of the industry GDP.

Furthermore, the meat industry is the number 1 exporter of Spain's food and agricultural products, even ahead of wine exports. In 2017, overseas sales reached 2.3 Mill. T of meat and meat products (6,085 Mill. Euros) to the whole world. And international demand is on the increase. This is an overwhelming success, considering that a little over 25 years ago Spain barely exported any meat at all.

The success of exports is due, not only to the quality of the products, but also to their safety, since the industry facilities are subject to rigorous official health and sanitary controls, and many have additional private certificates which guarantee the traceability of the product and its correct treatment during the process.

Pork meat is one of the cornerstones of Spanish cuisine, featuring in numerous dishes, tapas and snacks, forming an

integral part of the Mediterranean diet, declared Intangible Cultural Heritage of Humanity by UNESCO. One example of how deeply rooted it is in our culture, is the fact that la *matanza* – pig slaughter festivities – are still a popular celebration in a number of Spanish towns.

Although pig farming in Spain has been tightly bound to rural family economy, in the past decades its weight has steadily grown to become the powerful industry it is today. Whilst in 1954 there were no more than 9 refrigerated slaughterhouses and 615 cold meat factories, today there are nearly 3,000 companies devoted to the meat industry. In 2017, Spanish pork production reached 4.25 Mill. T, making Spain the 2<sup>nd</sup> pork meat producer in the EU (after Germany), and the 4<sup>th</sup> worldwide.

Pork meat is known for being very tasty, and is used both for consumption and for industrial processing. In fact, the average Spaniard consumes 5 Kg of ham per year. Spanish pork products are divided into two main categories depending on the race they come from. The majority is white pork, from which ham, cold meats, and cold cuts are made. The rest comes from the Ibérico race, indigenous to the Iberian Peninsula, hence its name.

In Spain, about 47 million cured hams are produced annually. Only those which comply with Especialidad Tradicional Garantizada (ETG or Guaranteed Traditional

Specialty -GTS) regulations can be marketed under the Serrano denomination, and only those which comply with the Norma de Calidad de Productos Ibéricos (Iberian product Quality Standard) can be marketed with Ibérico label. Ibérico ham production is also protected by 4 Protected Designations of Origin (PDO): Guijuelo, Jabugo, Los Pedroches and Dehesa de Extremadura, and there are 2 more PDO and PGI for hams from white pig races: Jamón de Teruel and Jamón de Trevélez.

In recent years, acorn-fed Ibérico ham has positioned itself alongside the most sophisticated gourmet products in the world. This ham is made from free-range Ibérico pigs reared in the great holm oak pastures to the West and Southwest of the Iberian Peninsula. Their nourishment gives their meat a very unique and highly appreciated taste. This race's distinguishing quality is the infiltration of intramuscular fat, a healthy unsaturated fat, which gives its meat an unbeatable texture and juiciness.

Spain also has a great tradition of manufacturing cured cold meats and cold cuts such as *paleta*, cooked ham, *lomo*, *chorizo*, *fuet*, *longaniza*, *salchichón*, etc. These are processed by means of curing, and occasionally enriched with spices such as paprika and pepper. Their production goes back to the Middle Ages. Originally production consisted in mixing pork with lard, blood, nuts, pepper and cinnamon since spices helped to preserve them. Then

The meat industry is the number 1 exporter of Spain's food and agricultural products

they were dried and smoked. Today all this process has been simplified and mechanized. A great number of these products have successfully kept a presence in foreign markets for years.

In Spain, there are 17 Protected Geographical Indications (PGI) for fresh meats and 8 for cold cuts and sausages (such as *sobrasada*, *cecina* and *botillo del Bierzo*). Located across the entire national territory, PGIs safeguard the quality of some of the finest Spanish meats, such as Sobrasada de Mallorca or Chorizo de Cantimpalo. Their purpose is to protect the qualities that differentiate the meat of pigs reared in specific areas, whether because they are indigenous races, because of the environment they graze in or the nourishment they ingest. The resulting meat is of excellent quality as well as being extraordinarily tasty and juicy.



# Embutidos Goikoa

The passion of a family



There are flavours and aromas that we remember, that are forever embedded in our memory, and that remind us of things made the right way. Our brand and products convey authenticity, tradition, imagination and innovation. They speak about our origins, the essence of our land, the region of Navarre.

Goikoa is a family-owned company created over 80 years ago by Eugenio Jiménez in a small butcher shop in Sangüesa (Navarre). His son, Javier, the real figure behind the creation and development of Goikoa, put all his energy and passion on growing his father's business into an industry. Today, with his children at the helm, the company is strongly committed to international expansion, Goikoa's main strategy for growth and development.

The company is committed to adapting to new markets demands and especially to export, making every effort to guarantee the highest standard of quality that has enabled Goikoa to gain a foothold and grow in those markets.

Our values of flexibility, customer focus and quality products lead our international expansion.

Goikoa is one of the leading producers of meat products in Spain. Goikoa has evolved to secure a strong presence in the domestic market and holds the firm belief that there

Our brand and products convey authenticity, tradition, imagination and innovation. They speak about our origins, the essence of our land, the region of Navarre





are no borders, only markets awaiting the best products. Goikoa works with most large Spanish distributors and is present in over 20 countries.

Product quality is Goikoa's priority from start to finish. Being a client-focused company, Goikoa provides the best service. Goikoa is also flexible and adapts to client needs ensuring a quick response to their demands. Having one of the widest product ranges of the market, Goikoa is the best choice when you are looking for a global charcuterie supplier. Being a family company implies a different way of being and acting, with professional ethics as our guiding principle. Being a competitive company, Goikoa is able to provide optimum value in both product and service.

Goikoa has grown to establish itself as a thriving company by continuously reinvesting in its present and future. Goikoa is strongly committed to the consumer and provides solutions in nutrition, health, flavour and consumption convenience. Goikoa maintains strict controls over its production process; from the raw ingredients to the moment the product reaches the consumer, ensuring the traceability of each of its products.

Goikoa provides optimal facilities at its two premises, which are located in Sangüesa, surrounded by the Pyrenees and permeated by the know-how of a land, Navarre, famous for its fine gastronomy. Over the past 7 years Goikoa has expanded its facilities (new processing room, new curing facilities, and new sliced meat lines) and new technologies, ensuring the highest level of: efficiency, capacity, specialization and flexibility.

Goikoa is committed to growing together with its client.

**Founded in:** 1981

**Productive capacity:** 15,000 T

**Number of employees:** 170

**Export markets:** UK, France, Belgium, Germany, The Netherlands, Italy, Ireland, Portugal, Andorra, Poland, Canada, Lebanon, Equatorial Guinea, Panama, Hong Kong, Japan, etc.

**Products:** Spanish Traditional Charcuteries: Chorizo, Chorizo Sarta, Chorizo Pamplona, Serrano Ham, Cooking Chorizo, Snacking Chorizo, Fuet, Salchichón, Cured Loin, Pancetta, Tapas Platter; Cooked Ham and Pork Shoulder, Mortadella, Bacon; Turkey products: Breast, Mortadella, Chorizo, Salchichón

**Brands:** Goikoa, Goikoa Prestigio, Goipavo, private labels

**Certificates:** BRC (A), IFS (Higher), SAE (level 3- authorized to export to third countries); Certificates of origin: ETG Jamón Serrano, Consorcio del Serrano Español, Consorcio del Chorizo Español; Other certificates: SEDEX, PAI

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# ElPozo Alimentación

Meat protein-based food solutions



**E**LPOZO ALIMENTACIÓN is the flagship of the Grupo Fuertes holding company and is effectively its core business. It offers meat protein-based food solutions, using a unique production model: Integrated Process Control (IPC).

Founded in 1954, ELPOZO ALIMENTACIÓN prides itself in its strong commitment to ongoing improvement. R&D+i is at the heart of the business, innovating production processes, implementing new technology and launching solutions that improve the lives of consumers in the medium to long term.

Its corporate mission is to satisfy customers by providing balanced, wholesome foods that are both nutritious and appealing to the senses, offering the consumer good health, pleasure, well-being and convenience. To this end, 1% of the total turnover is invested in R&D+i.

Within the meat industry the company is a pioneer in healthy eating thanks to its BienStar and All-Natural range of products as well as its Extratiernos line of fresh pork, Ibérico pork, turkey, chicken and beef. Furthermore, its commitment to sustainable development enables it to continue building the trust of its primary interest groups.

A strong focus on customer service is our main differentiating factor. This was achieved from the beginning

Our Integrated Process Control (IPC) provides thorough food security for all our products and guarantees the welfare of all our animals





by introducing the unique and pioneering Integrated Process Control (IPC). This tracking system directly oversees all activities: from researching customer needs and demands to obtaining point-of-sale information; constantly supervising everything from raw materials to produce feed, breeding farms and production, processing, manufacturing, marketing, services provided to distribution chains, and even offering personalized customer service. This is how ELPOZO offers nourishing food solutions that guarantee health, flavour and convenience, and proves its commitment to nutrition and well-being.

As part of Grupo Fuertes holding company, one of the firm's determining characteristics is its total vertical integration. All of the companies in the group link their activities in order to track every product they sell. The company is adapting itself to face a future of assured growth in an increasingly global market. Cutting-edge facilities, a leadership team, and innovative food solutions are the ingredients required for facing this challenge.

ELPOZO believes in the future, proof of which are the high levels of investment. In the last four years alone (coinciding with the financial crisis), it has invested 248 million Euros in upgrades.



**Founded in:** 1954

**Productive capacity:** Between 450,000 and 500,000 T/year

**Number of employees:** 4,500

**Export markets:** Over 80 countries

**Products:** Meat protein based food solutions. Fresh and processed meat products

**Brands:** ElPozo Legado Ibérico, ElPozo Selección, ElPozo All Natural, ElPozo Extratiernos, ElPozo BienStar, Almirez

**Certificates:** ISO 9001, ISO 14001, BRC, IFS

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## Ibéricos Torreón Salamanca



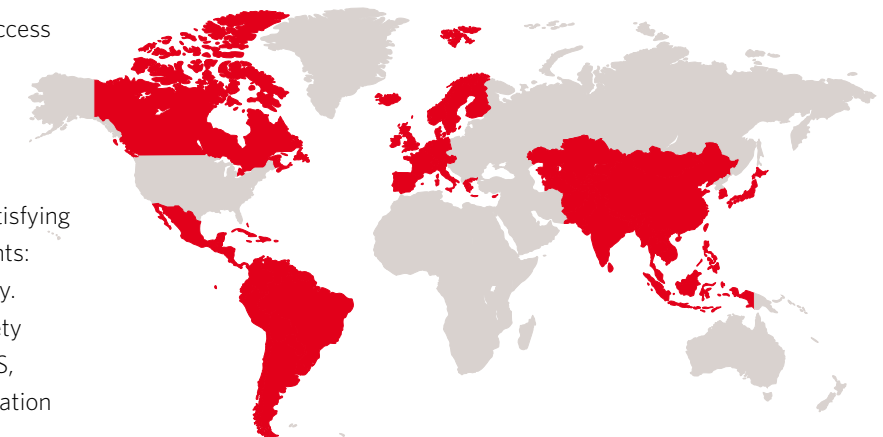
Ibéricos Torreón has a long experience manufacturing Iberian pork products dating back to the 60's.

When in 1981, Generoso García decides to move the cured ham and cold cuts company from its original site in Guijuelo a Villares de la Reina (Salamanca), he takes a step forward in developing a project that has grown into one of the sector's most recognizable brands. Step by step a slaughterhouse with its cutting room is built, the facilities where the Iberian hams are cured naturally are expanded, and the management premises are brought up to date in order to offer the customers both the best possible service and an exquisite product.

Nowadays the family's third generation controls and directs the production, organization and management of the company, never losing sight of what our grandfathers taught us, yet adapting to the health and safety requirements and the culinary trends that the current times dictate.

Ever since the birth of our company, commercial success has been based on three fundamental pillars. First, respect for tradition and careful production, building on the knowledge and culture of Iberian pork that constantly evolves and improves over the years. Secondly, a personalised service, aimed at satisfying the specific needs of each and every one of our clients: labelling, logistics, formats, etc. And, finally reliability. Our commitment to complying with health and safety regulations is backed by the UNE EN ISO 22000, IFS, APPCC management system and the export certification

Ever since the birth of our company, commercial success has been based on three fundamental pillars: respect for tradition and careful production, personalised service, and reliability





protocol (SAE), which allows us to maintain the strictest quality standards and reliable production.

Our premises bring together under the same roof: a slaughterhouse, a cutting room, a cold cuts factory, a ham curing facility, a refrigerated storehouse, a de-boning room, and a clean room for slicing, allowing strict control over production and quality of the products.

Thanks to the commitment and care with which we select the Iberian pigs we bring from the south of Spain (Extremadura and Andalucía), we achieve the excellent reliability of the pieces we produce, and the highly valued capacity for adaptation to our clients' needs.

For Torreón, the international market has always held considerable importance, so nowadays we export our products to over 25 countries in America, Asia and Europe, requiring us to have highly qualified export, quality control, and logistics departments.

Hence, thanks to the cooperation with the commercial, quality control and logistics departments, we can offer and excellent service when delivering our products as well as ensuring an excellent after-sale service both nationally and internationally.

**Founded in:** 1981

**Productive capacity:** 30,000 Iberian hams a year

**Number of employees:** 40

**Export markets:** China, Korea, the Philippines, Japan, Singapore, Thailand, Canada, Colombia, Cuba, Mexico, Paraguay, Peru, Germany, France, Italy, Greece, United Kingdom, Switzerland, etc.

**Products:** Ham, sirloin, cold cuts, and Iberian pork meat

**Brands:** Torreón, Delicias 67, Laudes

**Certificates:** UNE EN ISO 22000, IFS, APPCC

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# Jamones Aljomar

A family's labour



Jamones Aljomar is located in Guijuelo, in the Salamanca province, and was created in 1992, by Mr. Alfonso Sánchez Bernal and his wife Mrs. María del Carmen Sánchez Álvarez, capitalizing on over 40 years of experience in the business. It was in 1972 when Mr. Alfonso Sánchez set up his first business, "La Salmantina", in Seville. However, years later, in order to supply the overwhelming demand for Iberian products from his business in Seville, he decided to open a plant in Guijuelo called Jamones Aljomar, which opened on 12 December 1992. Thus 25 years ago Mr. Alfonso Sánchez made his dream come true and put the knowledge that he had acquired since his childhood to use. Thanks to the perseverance, effort and work of one family, Aljomar was born in Guijuelo.

The excellent quality of the Aljomar products is ensured by the Vertically Integrated Production cycle. A process closely monitored by the Aljomar family, which allows us to control each phase: from the nutritional control of the feeding in our farms, to our state of the art slaughterhouse, and the final curing process in our facilities in Guijuelo, Spain.

Our forecast for the 2017-2018 campaign is to process 40,000 Iberian pigs and 20,000 acorn-fed Iberian pigs. The company has a considerable share, as a majority shareholder, in the slaughterhouse El Navazo, the most modern of the sector.

Its respect for nature, regard for raw materials and meticulous control of the production process, make Aljomar synonymous with quality and tradition, craftsmanship and innovation





Aljomar's business model is based on the closed cycle of livestock production, sacrifice, quartering and manufacture and has over 300 employees. The production capacity and product control guarantees have made Aljomar the first company in certified pieces of ham and pork shoulders in the D.P.O. Guijuelo since the beginning of its activity.

Aljomar's profound respect for nature, care for its raw materials and meticulous control of its production process have made the company synonymous with quality and tradition, seamlessly combining craftsmanship with innovation. Concern for the constant improvement of its products has driven Aljomar to undertake a number of actions to ensure that they totally satisfy current market demands such as joining both ADILAC (Association of Lactose Intolerants) and FACE (Federation of Spanish Celiacs Associations).

As far as public relations are concerned, our company firmly believes in having a strong presence in fairs and other events of the sector, both nationally and internationally. (SIAL (Paris), Anuga (Germany), Gourmet (Madrid) Alimentaria (Barcelona). Tastings and product demonstrations are also common in our product promotion calendar. Only this way can we maintain the flavour which is to be shared with the most demanding palates in over 30 countries.

**Founded in:** 1992

**Productive capacity:** 60,000 pigs (annually)

**Number of employees:** 300

**Export markets:** USA, China, Japan, Korea, Singapore, Hong Kong, Mexico, France, Germany, Bahrain, Dominican Republic, Canada, Portugal, United Kingdom, Italy, Austria, Sweden, Switzerland and Netherlands

**Products:** Acorn fed Iberico ham, dried Iberico sausages and Iberico pork meat

**Brands:** Aljomar and Tributo don Alfonso

**Certificates:** ISO22000, BRC and IFS

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# Montesano

You like it healthy



The Montesano group is a family-run company founded in 1965, but the family has been making ham and Ibérico pork products for over 80 years, keeping alive a strong family tradition that has lasted for three generations. This, along with our adaptation to new technology in terms of nutrition and food safety yields a product of unbeatable quality and flavour.

Within its industrial division, the Group boasts 6 facilities, 3 production locations and 3 distribution warehouses. In its manufacturing capacity the company has two clearly separate ranges: on one hand the manufacture of products made from white pork, such as the sale of fresh and frozen meat, which takes place exclusively in the Canary Islands, and on the other hand the manufacture of products made from Ibérico pork which is processed at the facility the group owns in Extremadura.

Currently Montesano exports to all five continents (over 30 countries), Asia being one of the brand's most important foreign markets, with a commercial office in Japan, where the company has been selling its products for 15 years, and China, where it has been doing so for 7 years.

It is in the Extremadura *dehesa* – a sustainable ecosystem which is unique in Europe, where the dominant vegetation consists of a million hectares of holm-oaks and cork

It is in the Extremadura *dehesa* that Montesano is a reference point in the production of ham, pork loin, and 100% acorn-fed Ibérico pork cold cuts





trees and the Ibérico pig is king – where Montesano is a benchmark in the production of ham, pork loin, and 100% acorn-fed Ibérico pork cold cuts. Montesano, true to tradition, with the help of the most modern technology, has made one of the most complete industries possible. There, we check every step of the production process of these delicacies certified by Europe, China, Japan, South Korea, Latin America, Canada Australia and New Zealand to name a few.

The quality cycle starts with Montesano's genetic selection in the breeding farms, where a 100% Ibérico pork lineage yields perfect animals. They are born and live under great care. Between the ages of 18 and 24 months they run, bathe and eat nothing but fresh natural products, living in complete freedom. They then spend half a year in Montesano's mountains, fed on 12-15 kg of acorns a day until they reach a weight of 180 Kg.

Thus, in Montesano the production of such appreciated delicacies begins, which in some cases will last up to four years, as in the case of the 100% acorn-fed Ibérico hams and shoulders.

At Montesano, over a century of art and good practices – successfully rearing and producing – join forces with our constant growth, increasing our investments and production capacity, exporting and above all standing for quality.

The results are 100% Ibérico acorn-fed hams, shoulders, loins, loin fillets, *chorizos*, salami and *morcón*. Gastronomic jewels created by Montesano for the enjoyment of everyone who tries them in Spain and throughout the world.



**Founded in:** 1965

**Productive capacity:** 10.500 T

**Number of employees:** 430

**Export markets:** Over 30 countries. Among which Europe, Latin America, China, Japan, South Korea, Canada, Australia and New Zealand

**Products:** 100% Ibérico acorn-fed ham, Serrano ham, shoulder, loin, loin fillets, *chorizo*, salami and *morcón*, Ibérico pork meat

**Brands:** Montesano

**Certificates:** Ibérico quality Standard (RD 4/2014), UNE-EN ISO 9001-2008, ETG Serrano Ham (Guaranteed Traditional Speciality)

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# Prepared dishes, preserves, soups, sauces & spices



# Prepared dishes, preserves, soups, sauces & spices

One of the secrets behind Spanish cuisine's popularity is its use of spices and sauces. Spices have been used since time immemorial in Spain to season dishes, enhance their flavour and add a dash of colour. Some of them such as aniseed, mustard, coriander and fennel are native to the Mediterranean basin. In Spain the use of herbs such as basil, cumin, rosemary, thyme and oregano is also quite widespread.

Three spices closely associated to Spanish cuisine are garlic, saffron and *pimentón* (paprika powder). Although it is usually bought fresh, garlic has been consumed either dehydrated or powdered for years, since it maintains all of its properties. Spain is one of the main producers of green aniseed, and the Spanish variety is considered one of the finest and most aromatic in the world.

Saffron, the most expensive spice in existence, was known as "red gold" in ancient times because of its high price. Cleopatra already used it as a seductive aromatic fragrance. It was the Arabs who introduced its farming to Spain in the 10<sup>th</sup> century. Spanish saffron is recognized all over the world as the finest available. It is this very spice which gives paella its typical amber colour.

Saffron roses only grow in flat and dry lands with baking-hot summers and cold winters. Castile-la Mancha's plateau has all these qualities. The flower,

having turned sterile by thousands of years of hybrids, only reproduces through bulbs, and can only be planted and harvested by hand. Since it only flowers at dawn, it must be collected immediately so that it doesn't wither and so that its stigmas do not lose their properties. Each flower produces 3 deep red stigmas which must be separated by hand. To make 1 Kg of saffron 85,000 flowers are needed. After drying, the saffron is ready to be sold. This complex artisanal process accounts for its high price.

In his captain's log in 1493, Christopher Columbus mentioned *pimentón* (paprika) for the first time in history. But it wasn't until the 16<sup>th</sup> century that the monks of the Monastery of Yuste, where Emperor Charles V retired, popularized it. This specialty became so popular in Spain that by the 19<sup>th</sup> century it was as essential an item as salt and olive oil.

*Pimentón* is made with red peppers dried to the smoke of helm oak and oak timber, and then powdered. There are 3 varieties: sweet, sweet & sour and spicy. The main production areas are La Vera (Extremadura) whose production has received the category of Protected Designation of Origin, and Murcia. Nowadays not only is it an essential ingredient in dishes like Galician octopus, but it is used as condiment and preservative of such typical cold meats as chorizo.

Originally gazpacho only consisted of bread with water, vinegar and salt. It was not until the 16<sup>th</sup> century that tomato and other vegetables brought from the Americas started to be added

The Spanish spice and condiments sector comprises of 110 companies concentrated primarily in the regions of Valencia and Castile-La Mancha. They export primarily to the EU, the USA and to Arab countries.

One of the Spanish dishes where the use of spices is most prominent is Andalusian *gazpacho*. Originally this cold soup only consisted of bread with water, vinegar and salt,

but eventually it evolved to contain garlic or almonds as well. It was not till the 16<sup>th</sup> century that tomato and other vegetables brought from the Americas started to be added. Nowadays it is one of the stars of Spanish cuisine. It is refreshing, filling, and rich in flavour and vitamins.

The role of sauces in creating contrasts, softening flavours and making dishes tastier has grown more important over the past years. Although many are still prepared at home, an increasing number of industrial sauces taste home-made and save the consumer time and effort. The most widespread is Spanish style tomato sauce, the foundation of countless culinary creations. Its taste varies depending on its ingredients (garlic, onion, vinegar, sugar, spices, etc.). Its popularity stems from its versatility and convenience. Mayonnaise has its origin in Mahón, capital of the island of Menorca (Balearic Islands), and can be traced back to the 14<sup>th</sup> century. *Alioli*, another renowned Spanish sauce, is essentially garlic and olive oil beaten until they emulsify. The 45 companies which make up this industry are very versatile, launching new formulas for traditional sauces and innovative products such as sweet mustards, olive oil mayonnaises, romesco sauces, etc.

Every year, about 1.4 Mill. T of canned vegetables for a value of approximately € 1,450 Mill. are produced in Spain. The canned fruit and vegetable processing sector consists

of 110 companies employing 14,000 people, not taking into account the thousands of day labourers hired during the harvesting seasons. Currently it exports roughly 50% of its production (45% of its total revenue). The products it manufactures (excluding fruit juices and pickles) are classified into 3 main groups: canned fruit, vegetables and tomato. Canned tomatoes account for 45% of all production volume. This vegetable not only is of great importance in Spanish cuisine, but its worldwide demand has never decreased since the Spaniards brought it to Europe from the Americas in 1540.

Some outstanding canned vegetables are artichokes, mushrooms, peppers and asparagus. And although some are suffering from competition from the Far East or Latin America, their exquisite taste sets them apart. Canned vegetables account for 23% of the volume and 30% of the revenue of the canning industry. 50% of the total production is sold abroad, the main recipient being the EU, followed by the USA.

In the past years we have witnessed breathtaking advances in preparation, refrigeration, packaging, preservation and traceability of these foods. Prepared meals, for example, have made a giant leap, and one can now enjoy ready-made meals that taste homemade. The industry has responded to recent demand for organic products and has developed organic product ranges.

Saffron, the most expensive spice in existence, was known as 'red gold' in ancient times because of its high price. Today, to make 1 Kg of saffron 85,000 flowers are needed

Consumption of prepared dishes in Spain is on the increase even though it still remains lower than in countries like the USA, the UK or France. However, Spain holds the 4<sup>th</sup> place in Europe in terms of new readymade meals launched on the market. In this sector not only are innovation and development key, but consumers increasingly want to know the natural origin of their ingredients, and increasingly demand the introduction of ingredients with a Protected Origin Designation.





# Audens Food

Committed to the best



The Audens Group is made up of companies with over 40 years' experience in deep-frozen ready-made meals, with a presence both in retail and in the foodservice market.

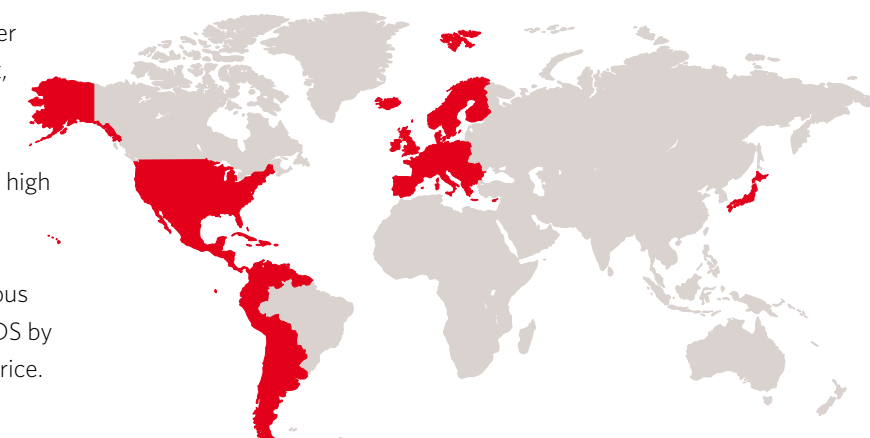
Our revenue reached 103 million Euros in 2017, with over 48,000 T of convenience food products manufactured in our factories. Our logistics warehouse is located in Parets del Vallés. It is fully automated and has an expandable capacity of 8,000 pallets.

Aiming to offer a broader portfolio and make our production more international, in 2017 the Audens Group bought ICA Foods (Spain), devoted to meat products, and recently also bought Eurofrozen, a Portuguese company specializing in typical Portuguese ready-made meals.

Our business beliefs are: client focus, mutual supplier loyalty, respect for the product and the environment, and corporate social responsibility. Our aim is to offer our consumers healthy and balanced food solutions, in line with market trends and with a high element of cuisine.

Our company distributes its products under numerous commercial brands such as Prielá, Frinca, ICA FOODS by Audens Food, Cozinha Pronta, Table Gourmet and Price.

We carefully select the finest ingredients, are respectful and scrupulous in the preparation process and aim for product excellence to guarantee the utmost quality in a creative and innovative fashion





The Audens Group currently has 7 factories – 6 in Spain and 1 in Portugal – and over 700 employees. The facilities in Granollers, Balsareny, Sant Fruitós de Bages, Parets del Vallés (Barcelona) and Roales del Pan (Zamora) are all certified ISO 9001, ISO 14001 and IFS. The facilities in Balsareny are also BRC certified.

These factories specialise in manufacturing tapas, finger food, cheese snacks, pasta, pizza bases, poultry, fish, cephalopods, puff pastry and churros.

ICA Foods, which has been part of the group since 2017, has been in the meat business for over 25 years, and its factory is based in Barcelona. It specializes in hamburgers, minced meat and meatballs, as well as raw and frozen meat. It is certified FSSC 22000.

Eurofrozen, founded in 1985 and located in Almada (Lisboa), has been part of the Audens Group since March 2018. Its *pastéis de nata* and *pastéis de bacalhau* have received the iTQi 2017 award from the International Taste & Quality Institute Brussels. It is certified ISO 9001, ISO 22000 and MSC.



**Founded in:** 1975  
**Productive capacity:** 69,000 T  
**Number of employees:** 700  
**Export markets:** Europe, Asia, North and Central America  
**Products:** *Tapas*, finger food, cheese snacks, pasta, pizza bases, poultry, fish, cephalopods, hamburgers, minced meat, meatballs, typical Portuguese meals, puff pastries, *churros* and Portuguese desserts.  
**Brands:** Prielá, Frinca, ICA FOODS by Audens Food, Cozinha Pronta, Table Gourmet and Price  
**Certificates:** ISO 9001, ISO 14001, IFS  
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# Carmencita

The guarantee of experience and the value of innovation



Early in the 20<sup>th</sup> century, in Novelda, there was a growing trade of saffron brought from La Mancha and taken to the Far East. Jesús Navarro Jover, grandfather, saw a business opportunity and started selling small paper sachets holding 90 mg. of saffron.

Jesús Navarro, S.A. started out in 1919 and was the first Spanish company to bottle spices in glass jars. In 1929, Carmencita's famous picture is taken and, since then, it has become the name and image of our spices.

The '70s and '80s were years of great expansion at Carmencita, and ever since, the company has not stopped growing, adding new ranges of spices and condiments, and developing its own mixtures to take the authentic flavour of Spain to the world. Today, we can proudly say that Carmencita is the leading Spanish brand on the spice market.

The vocation of this pioneering, innovative company led Carmencita to develop a mixture of spices for seasoning paellas which eventually developed into our famous Paellero, a true symbol both in Spain and a number of countries around the world. Nowadays we offer a wide range of products like spices and condiments, powdered desserts, sweeteners and herbal teas.

True to its commitment to flavour, Carmencita's product development department is constantly carrying out

Jesús Navarro, S.A. was the first Spanish company to bottle spices in glass jars. Today, we can proudly say that Carmencita is the leading Spanish brand on the spice market





organoleptic tests in the tireless pursuit of the perfect flavour of every product that the brand launches on the market.

Our company has standards ISO 14001, IFS and BRC in place and has also implemented an equal-opportunities plan. Our laboratory is certified and authorised by the Spanish government's General Directorate of Public Health and has its own personnel for the preparation of physical chemical, microbiological and organoleptic analyses for quality control, from the arrival of the raw materials to the finished product.

Jesús Navarro S.A. has a strong commitment to those who suffer from coeliac disease and, as a result, has an elaborate control system to prevent gluten from entering in our products and avoid any trace of cross-contamination on the production lines.

Carmencita has been exporting since the 1940s and we are currently present in over 50 countries on all 5 continents. Our company has a multilingual sales team which specialises in the development of international markets, and holds a regular presence at the main international food fairs all over the world.



**Founded in:** 1919

**Productive capacity:** 2 Mill. units

**Number of employees:** 297

**Export markets:** Over 50 countries in 5 continents

**Products:** Spices and condiments, *paella* products, powdered desserts, sweeteners and herbal teas

**Brands:** Carmencita

**Certificates:** IFS, BRC, ISO 14001

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# Ferrer Tradicional

Artisan tradition



With over 50 years' experience producing high quality branded foods, the family-owned Ferrer business began its journey in 1964 in Sant Llorenç de Morunys, in the foothills of the Spanish Pyrenees, when the grandfather of the family, Josep Ferrer, started the collection and distribution of wild truffles and mushrooms.

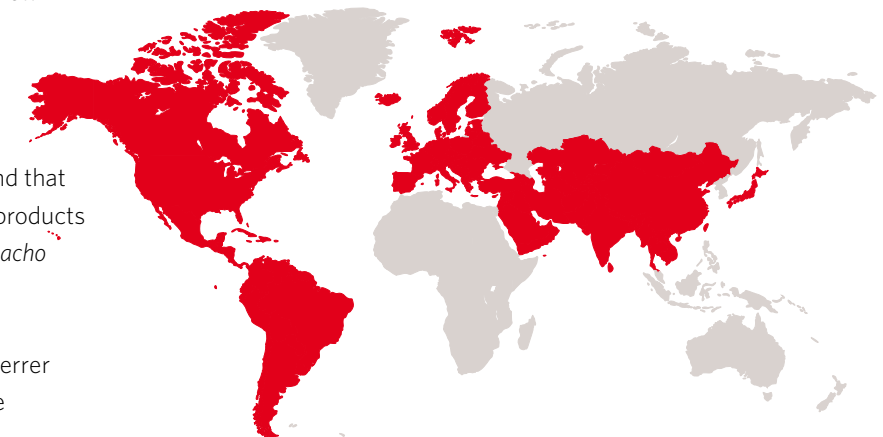
In the mid-1980s, the company's steady growth and the need for more space in the production facility called for the headquarters to be moved to Santpedor (close to Barcelona) and for the opening of a new production plant in Moraleja (in the south west of Spain).

By 1995 new product ranges such as sauces and various vegetable preserves were introduced. Since then, Ferrer has been consistently expanding its range with new product lines: broths, soups and ready-to-cook *paella*, to mention a few.

Now led by the second generation of the Ferrer family, the company is one of the leaders in the national market: 2 production facilities, over 200 products and nearly 100 employees supply a demand that extends throughout the world. Among the flagship products are the *calçot* sauce in the local market and the *gazpacho* around the globe.

The latest addition to the Ferrer product family is Ferrer Tapas, a new range of products used to prepare the

Ferrer products are prepared following traditional methods, with natural ingredients provided by approved Spanish suppliers and fresh food producers





much-appreciated Spanish tapas, such as traditional sauces, pepper preserves and a ready-to-cook Spanish omelette mix. Internationally, Ferrer is present in over 50 countries and is particularly strong in Europe, USA and South America, while experiencing a constant growth in Asia.

Ferrer products are made following traditional methods, with natural ingredients provided by approved suppliers and fresh food producers from across Spain; they reach the consumer only after a stringent raw material selection and production control.

When the food has been cooked, it is pressure-sealed in sterilized glass jars. Glass is a pure material, transparent and recyclable. The other advantage of glass is that it is a good heat conductor, even more efficient than stainless steel cans, which helps with our natural preserving process, in a similar way to large scale water-bath canning methods.

The quality of the Ferrer products is guaranteed by Certification from IFS Food (International Featured Standards).

The company’s goal is to bring innovation to traditional Spanish and Mediterranean cuisine always adapting to changing consumer lifestyles. Thus Ferrer was awarded the Innovative SME stamp by the Ministry of Industry of Spain, which values small and medium enterprises for their research and development projects.

The company works on the continuous improvement of production processes, improvement of existing products and development of new ones to meet changing market

**Founded in:** 1964  
**Productive capacity:** 70,000 bottles/ day  
**Number of employees:** 100  
**Export markets:** Europe, North America, South America, Asia, United Arab Emirates  
**Products:** Organic and Non-Organic, ready to eat, natural, shelf-stable soups, broths, sauces, paella and vegetable preserves. All our products are free from preservatives and colouring agents  
**Brands:** Ferrer  
**Certificates:** IFS Food, Innova , FDA, Halal  
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demands. All of these interdepartmental projects are based on the concept of innovation throughout all levels of the business.

# Goya® Gazpacho

If it's Goya...it has to be good!



As an ancestral treasure, at Goya we have bottled the essence of the Mediterranean diet, Goya Gazpacho, one of the tastiest recipes of Andalusian cuisine. Its origin dates back various centuries, fruit of the ingenuity of the time, when farmers and shepherds from the fields of the Guadalquivir River Valley, facing harsh summer conditions in southern Spain, had to keep themselves nourished and hydrated.

We use over a kilo (2.2 lbs) of freshly cut vegetables to prepare a litre (0.3 gallons) of Goya Gazpacho. With our consumers and friends in mind, we've reinvented this marvellous, traditional dish without changing its foundation. We've prepared it using only the best ingredients in order to provide you with the finest *gazpacho*. This classic and refreshing vegetable juice is made with fresh vegetables grown in Spain: savoury sun-ripened tomatoes, refreshing cucumbers, delicious peppers, and the unmistakable taste of our garlic, all blended with our magnificent Goya UNICO Extra Virgin Olive Oil – a prized delicacy of world renown –, without forgetting the magic touch of sublime Sherry Vinegar and a pinch of salt.

We receive the best vegetables every day from Andalusian orchards in small boxes which prevent them from deteriorating. We carefully select and choose the vegetables which are then blended at a temperature below 54°F (12°C). A greater sense of dedication during this process allows us

This classic and refreshing vegetable juice is made with our Goya “Único” Premium extra virgin olive oil and fresh vegetables grown in Spain





to improve quality, avoid oxidation and thus allow you to enjoy the authentic flavour of Goya Gazpacho. Your taste buds will transport you to the heart of Al-Andalus.

Discover a balanced explosion of flavours in your mouth with Goya Gazpacho: smooth to the palate, highlighting all of its ingredients equally, reddish-orange in colour, gluten free, and suitable for any allergen-free diet. We bring the delightful memory of newly harvested fields and fresh vegetables to your table using pasteurization and the Tetra Prisma® Aseptic system, as a guarantee of food safety and freshness. Your *gazpacho* will have a 12-month shelf life!



**Founded in:** 1974  
**Productive capacity:** Product in launching phase. No statistics available.  
**Number of employees:** 27  
**Export markets:** Australia, China, Dominican Republic, Ecuador, El Salvador, Honduras, Japan, Korea, Nicaragua, Nigeria, Poland, Puerto Rico, Republic of the Congo, United Kingdom, USA, etc.  
**Products:** *Gazpacho*  
**Brands:** Goya  
**Certificates:** BRC “Grade AA”, IFS V6 “Higher level”, ISO 9001-2008, HACCP, C-TPAT  
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# Grupo Palacios

A family secret

The Palacios business group is a benchmark in the Spanish food industry. It was born as a family butcher shop that opened its doors in 1960 in the town of Albelda de Iregua, in the Rioja region. In 1983 this town from Rioja witnessed the foundation of Embutidos Palacios, which, at the beginning, exclusively manufactured sarta *chorizo*, a product made with love and care using one of Miss Dolores' ancient recipes, the secret of a family who successfully combined hard labour with the latest technology. The result was a 100% natural *chorizo*, free of any preservatives or colouring, which soon became market leader.

Nowadays, after decades devoted to innovation, quality and diversification, the Palacios Group is a benchmark in the Spanish food sector, employing over 1,000 people. Its wide portfolio of products includes a number of categories of refrigerated and frozen products, ranging from *chorizo* to frozen desserts, Spanish tortilla, ready-made meals, pizzas and breaded foods to say a few. It has positioned itself as Spanish market leader in *chorizo sarta*, refrigerated and frozen Spanish omelets, *chistorra*, and certain categories of ready-made meals and frozen desserts.

The Palacios Group aims to improve day after day, trying to stay ahead of market needs and adapting its products to consumers' needs. Palacios, a trademark that stands for over

Since 1983, Palacios objectives have been: satisfying our customers' needs by offering them traditional, high quality and nutritionally healthy products to match their lifestyle





50 years of know-how and understanding tradition, uses the latest technologies to ensure food safety.

Ever since its foundation, the Palacios Group has always shown an international vocation. It is worth highlighting that it was the first Spanish chorizo to receive the USDA approval for sale in the USA. This focus on export has allowed our products to be available in five continents. Our products are exported to the main European countries such as Great Britain, France, Italy, Germany, Belgium or Portugal. In America they can be found in the USA, Canada Mexico, Brazil, Chile, Central America, etc. In Africa they are present in Morocco, Equatorial Guinea, and Angola. In the Middle East they reach the United Arab Emirates, whilst in Asia they are present in the Philippines and Hong Kong.

Quality is the pillar upon which the Group is founded, something that binds our company policy, our work and our products. This makes us comply with the strictest standards such as the USDA, IFS, BRC and ISO certificates. Palacios currently boasts nine production centres where it manufactures its extensive portfolio on premises that comply with the strictest quality certificates.

Since the future of Palacios is bound to development and innovation, as well as having our own researchers, we maintain partnerships with universities and foundations. We are constantly searching for those processes, systems and products that are best adapted to the market and industry needs.



**Founded in:** 1983

**Productive capacity:** Over 70.000 T

**Number of employees:** 1.000

**Export markets:** EU, USA, Mexico, Canada, United Arab Emirates, South America, etc.

**Products:** *Chorizo, chistorra*, refrigerated and frozen Spanish *tortillas*, refrigerated and frozen pizzas, refrigerated ready-made meals, frozen desserts

**Brands:** Palacios, Floristán, Granderroble, Fuentetaja, Te gusta, Quijote

**Certificates:** ISO 14001, OHSAS 18001, BRC, IFS, RSPO, FACE, ADILAC, EMAS, USDA, DisCert Certificate and SAE

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# Hijos de Salvador López, S.L.

The red gold

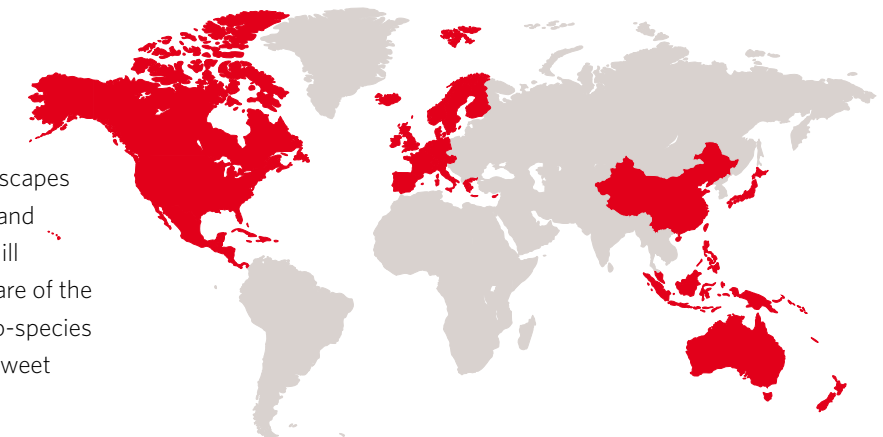


This family-owned company, established in 1940, has long been in the business of manufacturing and packaging *pimentón* de la Vera paprika. Three generations have managed to preserve the artisanal and traditional method of manufacturing paprika, a seasoning that emphasizes the richness of any cuisine, pleasing both the palate and the eye.

*Pimentón* de la Vera paprika is a product rooted in the history and culture of Spain ever since it was introduced by the San Geronimo monks of the Yuste Monastery in the 16th century. In 1556 Emperor Carlos I of Spain – also known as Karl V of Germany –, decided to spend his last days at that monastery, devoted to the monastic life. Tradition and wisdom went hand in hand to nurture, in the infinite calm of the monastery, the most precious gift the Geronimo monks could bestow on the senses.

La Vera region has a privileged micro-climate for the natural development of peppers. This heavenly enclave in the northern part of Extremadura has snow-covered hills in the winter and rich green landscapes in the summer, cherry trees that blossom in spring, and many water-filled ravines that twist and turn downhill between rocks and bushes. The peppers they grow are of the *Capsicum annum* species and *Longum cerasiforme* sub-species and give rise to three types of pepper: sweet, bittersweet and hot.

Three generations have managed to preserve the artisanal and traditional method of manufacturing paprika, a seasoning that enhances the richness of any cuisine





Our commitment to consumer quality is backed by strict independent quality certificates.

*Pimentón de la Vera* paprika is obtained by grinding smoked, ripe peppers. They are smoked over oak wood that gives off the ideal amount of heat needed to dehydrate the pepper fruit. This process gives *pimentón de la Vera* paprika its three main characteristics: aroma, flavor and color stability.

The aroma and flavor are obtained through a traditional system of smoke drying, while color stability results from the high degree of fixation of carotenes that occurs in the pepper throughout its cultivation under La Vera's microclimate and the drying process.

We strictly monitor both the cultivation of pepper and processing of paprika. In addition, we use an automatic packaging process for both for the plastic-lined raffia sacks and the aluminum bags and cans.

Our ERP (Enterprise Resource Planning) system integrates all business processes and ensures detailed traceability in real time.

The CRM (Customer Relationship Management) software we use allows us to personally address all of our customers. This generates continuous feedback, since they can share their tastes and preferences through social networks like Facebook, Twitter, or Instagram (@pimentonvera).



**Founded in:** 1940

**Productive capacity:** 300 T/year

**Number of employees:** 15

**Export markets:** More than 30 countries, like Mexico, the UK, Japan, Taiwan, the USA, Australia, Greece, Germany, Belgium, Switzerland, Nicaragua, Canada, the Netherlands or Finland, among others

**Products:** Paprika in plastic lined raffia sacks, aluminum bags and cans

**Brands:** Las Hermanas and Los Extremeños

**Certificates:** IFS Food, FDA, DOP Pimentón de la Vera (Protected Denomination of Origin), Foods from Extremadura, FACE (Spanish Federation of Coeliac Associations)

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# Dairy products



# Dairy products

The consumption of milk and dairy products dates back to the Mesolithic, when man ceased being a hunter-gatherer and began practicing agriculture and rearing livestock. From the moment man discovered milking, goat, cow and sheep milk were considered the nourishment par excellence, source of life and strength. The Assyrians were the ones who perfected manufacturing dairy, obtaining far more refined products.

Being on the pathway between Europe and Africa, Spain suffered numerous invasions over the course of history. However, it was able to profit from them, enriching its cultural heritage and allowing, ever since ancient times, the development of different forms of dairy consumption.

This historical heritage, Spain's uneven terrain and climate, as well as the different species of livestock, all contributed to the dairy sector's variety. The result is that in nowadays in Spain one can find the most recent innovations and developments to enhance the fruit of these most ancestral traditions.

The dairy sector is crucial in Spain in the sense that it is not only fundamental for the economy, but that it aids the development of rural population. Within the livestock sector, dairy is the 2<sup>nd</sup> most relevant one, behind the pig industry. The rearing of cattle and the production and transformation of dairy products employs close to 60,000 people directly and generates over 13,000 Mill. Euros every year. Milk

consumption in Spain has been steadily decreasing in the past few years. Notwithstanding, the intake of dairy products has undergone a moderate increase, particularly cheeses, shakes and desserts.

Of all types of milk produced by Spanish dairy farmers in 2016, 87.6% was cow milk, 6.8% was sheep milk and 5.6% goat milk. As a matter of fact, the more than 540,000 T of sheep milk produced in Spain, positions us as the 2<sup>nd</sup> producer of this kind of milk in the EU, following Greece and above Italy or France. And the 430,000 T of goat milk produced in the same year, make Spain the 2<sup>nd</sup> producer of goat milk of the EU after France.

One of the most successful products of the Spanish dairy industry is cheese. The cheese industry in Spain started taking off halfway through the 20<sup>th</sup> century. Traditional cheese manufacturers turned into small industries, maintaining that unique artisan touch that nobody else could give to their cheeses. These gave way to medium and large companies, whose production techniques avail themselves of the latest developments in order to successfully compete, not only in the Spanish market, but also abroad.

Thus every Spanish region boasts one or more kinds of cheese, from pure sheep, goat or cow milk and developing into hundreds of different nuances and textures made from the blend of these milks, yielding over 100 recorded

During the prestigious World Cheese Awards 2017, 14 Spanish cheeses were awarded SuperGold, ranking among the top 66 best ones in the world

varieties, 27 of which are protected by Designation of Origin. Spanish cheeses have a strong personality, both in taste and texture, and even in form and shape, all of them being very different from each other.

The highest selling cheese in Spain, and the best-known cheese abroad is Manchego. There are a great variety of them, most of them strongly rooted in the regions where they are produced. Most artisanal cheeses used to only be available in their regions of origin, but nowadays, thanks

to the boost in the sector, they can easily be found in delicatessen shops and have even started being exported.

During the prestigious World Cheese Awards 2017, 14 Spanish cheeses were awarded SuperGold, ranking among the top 66 best ones in the world. This is not only the result of centuries of labour, but also thanks to the daring effort of the Spanish dairy industry which has spent years exceeding itself to achieve the highest quality products.

The Spanish dairy sector annually transforms over 7 Mill. T of milk (cow, sheep and goat. In 2016 Spain exported over 476,000 T of dairy products for a value of 915 million Euros. 88,000 T were cheeses, whose value reached 41 million Euros.

But the dairy sector in Spain is far more than just cheese and milk. The latter has experienced a great diversification, both in its products (yoghurts, dairy desserts, curds, etc.) as in its formats, designed to make the consumer's life easier.

A popular desert among Spaniards is combining cheese with quince jam, nuts or bread. Another fun and original dessert or snack from Málaga is fig bread, whose origins are probably Arabian. This dessert, made with dried figs, almonds and herbs is traditionally eaten at Christmas. But apart from these there are numerous dishes made from dried fruit, nuts and sugar to sweeten the Spaniards' palates.



# Capsa Food

Lo mejor por naturaleza



CAPSA Food is a leading national dairy company specializing in milk and dairy products, with 1,300 employees that work every day for the wellbeing of families.

Central Lechera Asturiana, its main brand, is the one that has connected the most with Spanish consumers over the decades. It is a brand that evokes honesty, naturalness, origin and closeness. For over 50 years this company has been devoted to doing what it does best: caring for, nurturing and ensuring the best flavour and quality milk to feed families with natural and healthy products.

The milk's origin speaks to us about its quality, and that begins in the meadows. Asturias has one of the greenest and most pristine landscapes, with its pastures enjoying a much more varied vegetation as a result of the converging weather patterns, which in turn causes them to be more nutritious and rich in vitamins and minerals.

Origin, naturalness, quality and taste are the 4 core brand values that differentiate our products from the rest.

CAPSA Food has 7 factories spread across 6 Spanish provinces, with capacity to process over 900 million litres of milk per year.

We have been devoted to what we do best: caring for, nurturing and ensuring the best flavour and quality milk to feed families with natural and healthy products





Central Lechera Asturiana SAT, CAPSA Food's majority shareholder, is a cooperative of farmers that is also the company's main supplier. The cooperative provides us with a range of services (technical advice, veterinary care, fodder for their herd, etc.) that guarantee the highest quality milk sourced at point of origin in order to ensure the best products (milk, cream, butter and yogurt) while maintaining all of the milk's nutritional properties and outstanding flavour.

Ideal conditions for product preservation and traceability are guaranteed from the point of origin to point of sale by subjecting them to numerous controls throughout the process.

We have the most innovative packaging in the Spanish market, endorsed by such leading suppliers as Tetra Pak and Combi bloc.

In terms of social responsibility, CAPSA Food supports the primary sector and the rural world; it promotes health through nutrition and a healthy lifestyle; it protects and it respects the natural environment and continues to be a top employer company ever since its foundation.

CAPSA FOOD is the first Spanish company to receive the European Seal of Excellence 500+ awarded by the European Foundation for Quality Management (EFQM) and the Excellence in Management Club (CEG), which indicates that it is a well-managed company and a national role model.

CAPSA Food is also the leading Spanish company and the leading milk brand with the best reputation, Reprtrak 2016.



**Founded in:** 1967  
**Productive capacity:** 1,300 Mill. Kg/l  
**Number of employees:** 1,300  
**Export markets:** EU, West Africa, Middle East, China, Southeast Asia  
**Products:** UHT milk, enriched milk, powdered milk, cream, milkshakes, butter, cheese and dairy ingredients  
**Brands:** Central Lechera Asturiana, Larsa, Ato, Asana, Lagisa, Vega de Oro, Innova Food Ingredients  
**Certificates:** European Foundation for Quality Management (EFQM) Seal of Excellence +500, 2013, Quality Certificate ISO: 9001, Environment Certificate ISO: 14001, OHSAS 17001 Conservation Certificate, RDI Certificate 16002, FSSC 22000, OHSAS 18001, SAE, BRC, Welfare Quality, UNE EN 166002, EFR, Empresa saludable  
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# QUESCREM

The cream-cheese [R]evolution



Quescrem is an innovative company specialised in the production of cream cheese and mascarpone, that designs, produces and offers outstanding dairy products in more than 40 countries all around the world. Our partners in the food industry, the food service industry and end consumers can enjoy our full range of more than 50 different products.

We are a private SME founded in 2006 as a spin-off of a research project of the Centre for Dairy Technology at the University of Santiago de Compostela. Our founders saw a market opportunity in using buttermilk and distinctive technology to make exceptional cream cheese like it had never been done before.

Today, twelve years later, we offer a wide range of products for the food industry, the food service market and the retail market. From regular or light cream cheese; organic cream cheese; lactose free cream cheese, mascarpone and fresh cheese; some Spanish specialties like cream cheese with Manchego or green olives; to high protein products, palm oil free chocolate spreads, and other delicious and healthy options for conscious consumers... the list goes on and on.

Our products are made with locally sourced ingredients of the highest quality that our state-of-the-art technology transforms into solutions to help culinary professionals

Nonconformity and innovation have led us to offer more than mere ingredients: outstanding products we are proud of





achieve their objectives in their preparations, whether it is producing frozen cheesecakes or baked pastry, aerating stable mousses or making sauces. Our many products have multiple and different applications.

We are based in Galicia, in northern Spain, at the heart of the country's most important milk production region, where there are officially more cows than people. Most of the milk and cream we use to make our cream cheeses is sourced from farms within 20 Km from our production facilities, which ensures maximum freshness. We test every delivery and apply the most demanding quality controls to every batch.

We are a technological-based company with advanced technical capabilities, exclusive production technology of our own design and highly automated facilities. We have been certified by Xunta de Galicia as the 1<sup>st</sup> technological-based dairy company as well as by the Spanish Centre for the Development of Industrial Technology and its NEOTEC initiative. We are strongly committed to innovation and development, we have our own R&D department that, along with marketing, works to meet our client's needs.

With our young, qualified and multidisciplinary staff, Quescrem has made innovation its trademark from the very beginning. This allows us to offer a variety of flavours to cater for all kinds of customers, consumer occasions and distribution channels.

Nonconformity and innovation have lead us to sell something more than ingredients: outstanding products we are proud of.

**Founded in:** 2006

**Productive capacity:** 6,000 MT

**Number of employees:** 60 people

**Export markets:** More than 40 countries in 5 continents

**Products:** Cream cheese in a broad variety of functionalities and flavours, mascarpone cheese with extended shelf life, fresh cheeses, the first culinary yogurt on the market, low-fat products, organic (bio) products, lactose free products, high protein products, etc.

**Brands:** Quescrem, Chocobó, Smart Food

**Certificates:** IFS, iTQi 3\*, Halal

**Contact:** Daniel Sineiro Rodríguez.

Export Sales Manager

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# Quesos Corcuera

The magic of La Mancha

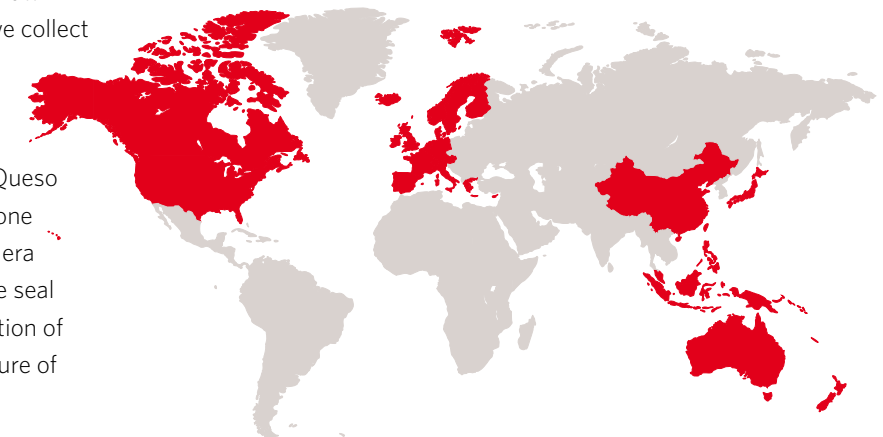
Quesos Corcuera is a cheese factory whose family origins date back over 70 years. It was founded by Eusebio Corcuera and his wife Julia Sánchez, and then taken over by their sons Ramón and Juan Carlos, who maintain the same dedication to the factory as their predecessors.

Currently, respecting the same traditional production policy as back then, the other family members pursue the company's expansion. Thanks to this evolution we have become a benchmark in the Manchego cheese sector in Spain and in the rest of the world.

Our extensive experience in manufacturing cheese has led us to pioneer such important aspects as the introduction of thorough quality control and painstaking care during the ageing of the product. We also enjoy an unbeatable raw material, milk, exclusively from La Mancha, which we collect from farms on a daily basis using our own tanker trucks.

Since the creation of the Regulatory Council of the Queso Manchego Protected Designation of Origin, and as one of the main promoters of its creation, Quesos Corcuera manufactures its sheep-milk cheese range under the seal of approval and guarantee of the Protected Designation of Origin, without ever forgetting the careful manufacture of traditional cheese.

At Quesos Corcuera we manufacture our sheep-milk cheese range under the seal of approval and guarantee of the Protected Designation of Origin





Our cheeses are present in most European countries, Asia, Australia and especially in the USA where Quesos Corcuera was one of the first Manchego cheese exporters over 25 years ago. This gives us a renowned and distinguished position within the cheese-manufacturing sector in our own country.

Currently we enjoy the highest national and international quality certificates and food safety certificates such as BRC (British Retail Consortium) and IFS (International Food Standard). Our daily improvement effort, periodic audits and quality control, offer our clients the utmost guarantee for a reliable and safe consumption.

We manufacture our cheeses with the most advanced technology throughout all of their processes, without ever losing sight of the traditional procedures which have made cheese a typical product of La Mancha culture. And we continue to advance and improve our product with the utmost care in its manufacture and in customer service.

How can one recognize genuine Manchego cheese? The term Manchego cheese is often used in reference to cheeses that are not protected by the Designation of Origin. To be certain that it is authentic we must look for its identifying elements.

A Manchego Designation of Origin cheese must carry the following elements. Next to the label it must have a small numbered counterlabel with the Designation of Origin's logo that guarantees that it has been certified by the Regulatory Council. And on the back of the cheese there must be a casein label, numbered and perfectly identifiable, which guarantees its authenticity.

**Founded in:** 1940

**Productive capacity:** 1.5 Mill. Kg

**Number of employees:** 27

**Export markets:** USA, Germany, France, the UK, Belgium, Holland, Portugal, Italy, Ireland, Sweden, Australia, Hong Kong, China, the Philippines and Japan

**Products:** Manchego cheese, cheese blend, goat's cheese, sheep cheese

**Brands:** Corcuera, Trigal, Juncia, Campo de Montalbán, Celestina

**Certificates:** IFS, BRC

**Contact:** Carmen Corcuera Sánchez de Pedro.

Manager

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Tel.: +34 925 750 069

www.corcuera.com

Our cheese range has been awarded the "International Taste & Quality Institute" (iTQi) 3 Star prize for Superior Taste, having been given top marks by acclaimed judges at tastings. It also won Gold, Silver and Bronze medals at the "World Cheese Awards" (WCA).



## Quorum

Specialists in traditional Spanish cheeses and accompaniments

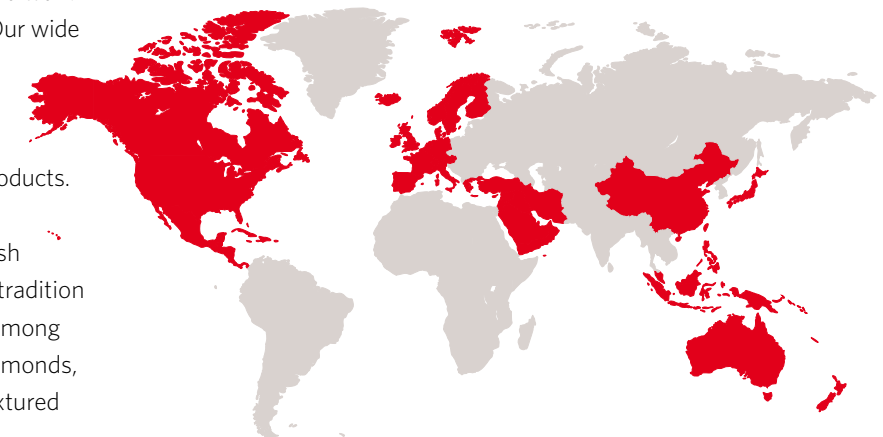


Twenty years ago, Thomas and María went to Spain after having lived in Germany for years. Fascinated by the many different landscapes, delightful Spanish villages and our rich gastronomy, they saw great potential in selling top quality cheese and homemade products in their homeland. They therefore travelled all over Spain visiting small family-owned cheese factories to source the best products. Little by little they created a network of cheese factories that joined forces to export their products collectively. Given the extensive knowledge they have of their country, Germany was their first export market. Later, they expanded to other European countries and the United States.

Thanks to their insight and attention to customer service, today Quorum International is an established export company with considerable knowledge of international markets. We export more than 100 products from all over Spain and work with top importers and distributors in 25 countries. Our wide range of cheeses represents almost every Spanish cheese P.D.O., and both national and international competitions, such as the World Cheese Awards, have given the highest ratings to the quality of our products.

Our accompaniments line includes a range of Spanish products that are part of the great Spanish culinary tradition and pair perfectly with cheese. Worth highlighting among them are our nutbreads, a mix of Spanish figs and almonds, as well as other combinations of tasty and nicely textured

Quorum works with over 50 cheese factories throughout Spain, mostly family-owned businesses that combine tradition with the most advanced technology





fruits selected from the finest raw materials. We have privileged access to Marcona almonds, highly appreciated in international markets for their natural sweetness and crispy texture.

Quorum works with over 50 cheese factories throughout Spain, mostly family-owned businesses that combine tradition with the most advanced technology. As a medium-sized company, we have the flexibility and agility to make decisions quickly and adapt to our clients' needs with new recipes and innovative products.

We offer a comprehensive and customized service in international logistics, sanitary documentation and customs procedures, and we design our labels to meet local market requirements.

Some of our cheeses have received awards at national and international competitions; among them our 3 and 12 month Manchegos Gran Valle, Zamorano, Cabra al Romero, Tronchón, Murcia al Vino, Monte Enebro and Garrotxa. In 2013 alone, we won six awards, including the prestigious Gran Selección and Selección Oro, and the Super Gold (highest grade) as well as the Gold and Silver medals at the World Cheese Awards.

Our Manchego Gran Valle dairy has been in business for over three generations; it is one of the few cheese factories in La Mancha that exclusively produce sheep's milk cheese and has been awarded the BRC certificate for both pasteurized and raw milk, as well as the IFS certificate.

After 20 years, our priorities are still, service, innovation and customer satisfaction.

**Founded in:** 1994

**Productive capacity:** It varies. E.g. Our Manchego cheese factory produces around 10 T/day

**Number of employees:** 8

**Export markets:** European Union, UK, North America, Dominican Republic, Australia, Japan, Singapore, China, New Zealand, Lebanon.

**Products:** Cheese (Manchego, Murcia al Vino, Iberico and artisanal cheeses), accompaniments (fruit cake, Marcona almonds, sweet flatbread, breadsticks, quince paste)

**Brands:** Gran Valle and Bonvallis

**Certificates:** BRC, IFS, ISO 9001, ISO 22000

**Contact:** Quorum International Group

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Maria Culler. General Manager

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# Sea products



# Sea products

Spain has always harvested the sea, both for domestic consumption and for trade. Tartessians and Phoenicians already fished sardines, anchovies and red tuna in the Bay of Cadiz. Greeks and Romans were taken aback by the large amount of sea creatures that could be obtained from its coasts. The strong demand for sea products from Hispania that occurred under Emperor Augustus' rule caused Spain to fill up with dry salting factories to supply Rome.

Documents from the 12<sup>th</sup> century prove that through the fishing method of “*almadrabas*” over 140,000 tunas were captured in one go. This method, invented by the Arabs but still in use today, consists of surrounding the tunas with nets that progressively close in until the tuna are forced into an ever smaller space and can easily be caught.

Today Spain is Europe's 1<sup>st</sup> consumer of fish, and the world's 5<sup>th</sup> consumer. I.e., 92% of all Spaniards consumes fish and seafood products on a monthly basis, averaging 45 Kg per capita annually. Since the national production is insufficient to supply such large local demand (46.5 Mill. inhabitants plus 82 Mill. tourists), Spain's state of the art freezer boats have moved to international fishing grounds, mainly in the N. and S. Atlantic and in the Indian Ocean. However, artisanal fishing still takes place on the Spanish shores. The Spanish fleet, with 9,572

vessels in 2016, is the most important one in the EU in terms of capacity, and one of the most sustainable ones in the world. Spain is the first industrial producer of sea products of the EU, with 16% of Europe's total production.

Spain can be divided into 4 distinctive fishing zones: the Mediterranean arc, the north (Galicia-Cantabrian Sea), Andalucía (Gulf of Cadiz) and the Canary Islands, each one specialized in the capture of a different type of fish or in harvesting shellfish. Galicia holds 45% of all captures, and its transforming industry carries the highest weight in the sector. Its star product is shellfish. The north fleet has specialized in coastal captures such as sardine, hake and shellfish, but also goes to the Atlantic fishing grounds to catch tuna, swordfish and cod. The Mediterranean arc concentrates almost half of the Spanish fleet, while Andalucía's fleet is an artisanal and coastal one. The Canary Islands fishing industry operates in the southeast Atlantic.

Traditionally, every Friday fish is served in most Spanish homes and restaurants, an age-long reminiscence of Lent. Of all oily fish, sardines, anchovies and horse mackerel are the most consumed ones, followed by tuna, albacore, mackerel, swordfish and halibut. Cod, which comes from cold seas and is preserved in dry salt, is also an important component of traditional dishes. In Spain Anchovies (a classic ingredient of Caesar salad and pizzas, for instance) are consumed in “*tapas*” or on toast.

Today Spain is Europe's first consumer of fish, and the world's fifth consumer. In other words, 92% of all Spaniards consumes fish and seafood products on a monthly basis

Summer is sardine season and the best time to eat them, since their meat is juicier. Grilled, fried, barbequed, pickled in brine or stewed, sardines are cooked in a wide variety of ways. Tuna has been part of the Spanish diet for over 25 centuries. Tuna family preserves – red tuna, albacore and bullet tuna – have become one of the main fares in Spanish households because of their versatility in the kitchen. A visit to fishmongers in Spain is a great lesson on marine zoology due of the impressive array of fish and shellfish on display. Some of them – swordfish, shark or scorpion fish – might even surprise the unaccustomed eye.

The reputation of Spanish shellfish was already legendary in Rome, which imported dried octopus to satisfy the cravings of the higher classes. A true delicacy, it is a must in all kinds of celebrations, reaching astronomical prices. Seafood can be subdivided into 3 major groups: cephalopods, molluscs and crustaceans.

Cephalopods – calamari, cuttlefish, baby squid, jumbo squid, etc. – are highly popular because of their exquisite taste and for being so easy to eat, since they neither have scales nor bones. Molluscs such as mussels, clams, black scallops or cockles, have become a staple of Spanish cuisine. Since most of them are found buried under the sand, on low tide shellfish collectors – their backs bent over for hours on end – dig the sand looking for these precious sea truffles.

But crustaceans are the true stars. No major feast or celebration would be complete without lobsters, spiny lobsters, crayfish, shrimp or prawns. Roasted, baked, covered in baking salt, deep fried, grilled, smoked, marinated or preserved, fish and shellfish have served Spaniards to express their creativity in the kitchen.

However, the sea's delicate equilibrium has led to a considerable increase in fish farming. Spain is the EU member state with the highest volume of fish-farming production (17.5%) with 223,709 T The main fish-farmed



species in Spain is mussels (162,012 T in 2014), followed by guilt head bream, rainbow trout and sea bass, although many other fish are also farmed here.

Spaniards consider preserves a culinary delight. Evidence of this is the sector's turnover in 2017 in excess of Euros 3,100 Mill. While the Spanish fish preserve industry has incorporated traditional methods to its industrial processes, technical developments enable it to can its products in brine, water, tomato and even cooked. The tuna fish family preserves account for 68,43% of all of Europe's production, occupying the 1<sup>st</sup> position in terms of exports in this sector. Spain is the 1<sup>st</sup> producer of canned tuna in Europe and is among the top 5 worldwide. Anchovies are a world apart, since they require a very elaborate, hand crafted process of transformation that goes back to the 19<sup>th</sup> century.

R&D is also playing an interesting role in the Spanish fishing industry. New processing technologies have enabled the creation of new fish-based products, adapted to the modern-day consumer's demands. The new challenges facing the fishing industries are to offer new products that are easier to prepare, require minimum processing, are healthier and have competitive prices. However, the industry is also looking to optimize production processes, reduce costs and develop new specific machinery. In this respect, the role of technological centres as a revitalising agent in

The tuna fish family preserves account for nearly 70% of all of Europe's production. Spain is the first producer of canned tuna in Europe and is among the top five worldwide

business innovation is key to increasing competitiveness in the industry.

The main innovation achievements focus primarily on food security; developing more sustainable preservation technologies; designing products to cater to the current consumer trends towards a healthier diet; managing resources; adding value to by-products and achieving more sustainable production models based on the concept of eco-innovation.



# Conservas Ortiz

Handcrafted sea products

Conservas Ortiz is a family owned company established in the Basque port of Ondarroa in 1891 and committed to the preparation of the highest quality canned seafood. Today, 5 generations on, Ortiz still employs exclusively traditional methods, making sure that the art of fishing, the origin and the freshness of the fish are preserved.

The high quality of our products is internationally recognised and Ortiz products are available in over 50 countries across 5 continents. Conservas Ortiz owns and manages several production plants in the Northern Coast of Spain, all of them very close to the main fishing ports of the Bay of Biscay (Cantabrian Sea) in order to ensure the best quality of the fish. Due to its specific weather conditions, water temperature and marine resources, the Cantabrian Sea is considered to be one of the best fishing spots worldwide where many species can be found at their best. Among these species we find the internationally renowned anchovies and albacore.

Ortiz white tuna is fished during the summertime using traditional techniques, such as pole & line fishing. It is then prepared in the traditional manner, always striving for exceptional quality, with a soft texture and an exquisite taste. At Ortiz we carefully select, clean and preserve the white tuna belly fillets (*ventresca*). This part of the tuna is processed separately by the hands of experts which have

Ortiz still employs exclusively artisanal methods to ensure that the art of fishing, the origin and the freshness of the fish are preserved





been with the company for decades. It is considered a delicacy, as it contains large amounts of natural and healthy oils. Many renowned international chefs use this exclusive product from Ortiz in their dishes.

Ortiz anchovies are fished in springtime and are always prepared fresh in order to maintain their flavour. As soon as the fish arrives at our premises it is graded and then separated according to the final product: whether salted anchovies or marinated white anchovies. Brown anchovy fillets are first aged in saltwater barrels for at least 6 months. Once the anchovies are properly preserved, they are either packaged whole in saltwater or hand sliced one by one and packaged in olive oil. Alternatively anchovies can also be marinated in vinegar for a few hours upon arrival from the port, and then packed in olive oil. This is what at Ortiz we call *boquerones*: white anchovies with a very fresh and mild flavour and a delicate yet firm texture. It is an extremely fresh product that we air freight to many destinations worldwide.

Ortiz sardines have been one the latest additions to our international portfolio. They are prepared following a time-honoured recipe taken from a book written in the North of France which dates back to 1824. At Conservas Ortiz we only manufacture sardines during their peak season because all fish is processed fresh.



**Founded in:** 1891

**Productive capacity:** -

**Number of employees:** Depending on the fishing

**Export markets:** Over 50 countries across 5

continents, primarily in Europe and America

**Products:** *Bonito del norte* (albacore), anchovies, yellowfin tuna, sardines, mackerel, mussels and ready meals

**Brands:** Ortiz

**Certificates:** Organic and Kosher certified products

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# Pescaviar

Excite your senses



Pescaviar is a family-owned business which started its journey over 25 years ago, with the aim of providing new innovative concepts to the natural fish roe market.

After years of in-depth investigation, the company conceived its first creation, which marked the beginning of the company's activity, back in 1997.

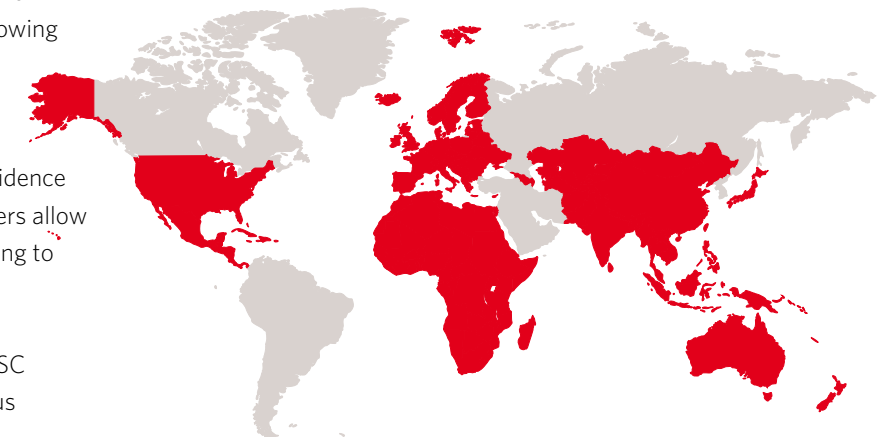
That is how fish spherifications were born: an innovative and sustainable alternative to natural fish roe, which can also be used in hot dishes without losing any of its organoleptic properties, opening up a whole new world of gastronomic possibilities. Success and recognition soon followed, giving rise to the company's steady growth. Today Pescaviar runs two production facilities (Reinosa and Murcia).

Our broad range of brands and formats can satisfy the requirements of all different marketing channels, allowing our products to be part of the foodservice industry, retail, specialist stores and gourmet stores.

The success we have achieved, our customers' confidence and the close collaboration we have with our suppliers allow us to keep on developing new products and expanding to new markets.

Pescaviar was a pioneer in Spain in obtaining the MSC ecolabel (Marine Stewardship Council), an ambitious

Pescaviar's core strategy is based on innovation, sustainability and competitiveness, as well as constant improvement in capacities and processes





program which aims to make international Seafood markets more environmentally aware and lead the way towards more sustainable and responsible practices.

Our deep commitment to quality and our vocation to satisfy our customers have driven us to create a new line of sweet and savoury spherifications with a liquid centre under the brand name Fresh Pearls. Our products can be found in over 30 countries on all five continents.

Pescaviar is committed to making a selection of gourmet food accessible to all, simplifying the preparation of recipes and providing a surprising and happy touch to every dish.

Pescaviar has always focused on the international trade aiming to develop exports sales, something which has led us to keep in contact with other Food companies in order to exchange experiences and knowledge of international markets.

This *quid-pro-quo* gave birth to Excellence of Spain (EOS), an association of Spanish companies whose aim is to share knowledge, experiences and synergies. The common thread of the members of this association is their Spanish origin, their commitment to quality and a clear export vocation.

All our processes have been certified by the most rigorous quality standards: ISO 9001, IFS, APPCC and BRC (A Grade). All these efforts have been rewarded with innumerable domestic and international prizes such as Alimentos de España, Tavola Foodservice, 1 Gold Star at the Great Taste Awards, the MSC Seaward prize for the Most Innovative Product, or the American Masters of Taste Award Excellence, to mention a few.

# Pescaviar

**Founded in:** 1997

**Productive capacity:** 350 T/year

**Number of employees:** 30

**Export markets:** Germany, Australia, Belgium, Bulgaria, China, USA, France, Hong Kong, Mauritius, Italy, Japan, Malaysia, Morocco, Mexico, Portugal, UK, Singapore, Sweden, Switzerland, etc.

**Products:** Fish spherifications, fruit spherifications and sauces spherifications, fish spreads and natural fish roe

**Brands:** Avruga, Moluga, Anchoviar, Arënkhä, Arënkhä Selection, Spherika Gourmet, Fresh Pearls and Chovas

**Certificates:** IFS, BRC, MSC

**Contact:**

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slopez@pescaviar.com
- Domestic: Elena Gastelut  
egastelut@pescaviar.com

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Tel.: +34 91 799 1005  
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www.pescaviar.com

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# Bakery, chocolate & honey



# Bakery, chocolate & honey

Bread and sweets are a significant pair in the Spanish diet. Every good meal includes bread and a dessert to finish it off. Bread has been eaten on a daily basis in Spanish homes for thousands of years. Iberian Celts introduced bread to Spain in the 3<sup>rd</sup> century B.C. long before Roman domination. For the Mozarabs (Christians living in Islamic Andalucía) it was a basic element of their daily diet. Each citizen kneaded their own bread and took it to public bakeries, after placing their own mark on it to avoid any possible confusion.

The first laws regulating bread making in Spain date back to the 14<sup>th</sup> century, and there are documents proving that the bakers' guild in Barcelona has existed since the year 1200. Elsewhere in the country, especially in the Mediterranean area, the bakers' guilds have been in existence for over 750 years.

Such a long history of bread making has led to a great variety of shapes, textures and ingredients. In Spain there are currently over 350 varieties, many of which have a local character. Although the most popular is known as *la barra*, the bar (or the pistol in Madrid), other local varieties that are in high demand are the Catalan *pa de pagés*, the Galician *hogaza* loaf, *candeal* bread, etc.

Bread holds a significant place in our cuisine. The *bocadillo* is the Spanish version of the British sandwich and between its halves, delicious feasts can be enjoyed such as Spanish

In Spain there are currently over 350 varieties of bread, many of which have a local character

*tortilla*, battered squid rings, meat, ham, etc. *Pulgas* (tiny loaves), *tostas* (toasted slices with all sorts of toppings) or *pa am tomaquet*, (Catalan bread soaked in tomato and olive oil) are some of Spain's classic *tapas*. Bread is also an essential ingredient of dishes like *gazpacho*, garlic soup or *migas*, a shepherd's dish made with fried breadcrumbs and meat.

In Spain about 1,521 T of bread, pastries, etc. were consumed in 2016, worth Euros 3,684 Mill. Due to the product's intrinsic characteristics (namely its limited shelf life), exports mostly concentrate around neighbouring countries.

To a Spaniard a sweet is a concentrated piece of happiness. As far as chocolate and cocoa are concerned, one must not forget that it was the Spaniards who brought it from the Americas to Europe around the year 1520. However, it was not until the beginning of the 19<sup>th</sup> century that it started

being manufactured in the form of bars. In the 20<sup>th</sup> century new formats came onto the market such as soluble cocoa, spreads and chocolate bars.

In 2016 in Spain 216,808 T of this delicacy were eaten, with a value of Euros 1,272 Mill., whilst 66,465 T, with a value of Euros 458 Mill., was exported. Spain is one of the biggest consumer of soluble cocoa in the world.

Honey is also deeply rooted in Spain, the second honey producer in the EU, obtaining over 32,000 T per year, and exporting 26,913 T (77% to the EU). But apart from its economic value, this sector is particularly significant for the environment, since bees play a key role in pollination and thus in the conservation of the diversity of wild flora.

The Spanish breed of bees (*Apis Mellifera Iberica*) is the main producer, although other breeds have been introduced to prevent inbreeding and genetic weakening. The country's variety of climates and ecosystems allows the production of a broad range of honeys, especially Mediterranean flora, such as thyme, rosemary, lavender, holm oak and orange blossom; however 46% of manufactured honey is *milflores* (literally, a-thousand flowers), made from numerous different flowers.

Honey is deeply ingrained in Spanish cuisine, having been used for the production of sweets since time immemorial.

The variety of climates and ecosystems of Spain allows the production of a broad range of honeys, especially from Mediterranean flora

For instance, some of the most typical sweets – *turrone*s (nougats) and marzipans –, without which Christmas in Spain would be unthinkable, used to be made with honey. There are countless varieties of these sweets: hard nougat, soft nougat, chocolate flavoured nougat, *guirlache* (brittle nougat) etc. Its origins, as with marzipan, date back to Arab colonization. Spain is the 1<sup>st</sup> worldwide manufacturer of Christmas sweets – 33,878 T worth Euros 306 Mill., which are exported mainly to the EU (75%) and Latin America (20%). Although the process has become automated, its manufacture is still traditional. Innovation in this sub-sector is crucial, though, having launched over 200 new products in 2016.



# Chocolates Valor

A passion for chocolate for over 130 years



The story of Valor Chocolates is about a passion for a unique product: chocolate. Behind that passion is a family of master chocolatiers started by Valeriano López Lloret who founded the brand in 1881. Valeriano gave the company its name and personality, and today it is an internationally renowned industry leader.

We are pioneers in the manufacture of chocolate bars using a high percentage of the finest cocoa and in creating our own network of chocolate shops. Our aim has always been to surge ahead with innovation as a mainstay of the company.

At Valor, tradition and innovation come together to amaze the most refined and discerning palates in search of new quality products. Our R&D Department includes master chocolatiers, experts in creating unique blends and authentic flavours.

We currently manufacture our products at a facility in Villajoyosa (Alicante). The modern 22,000 m<sup>2</sup> factory is where we make over 20,000 T of chocolate every year, a 17.8%\* share of the Spanish chocolate bar market.

By paying special attention to innovation, at Valor we can offer a wide range of new flavors, textures and formats adapted to consumer tastes. Our master chocolatiers use the finest raw materials to produce an entire range of

We are pioneers in the manufacture of chocolate bars using a high percentage of the finest cocoa and in creating our own network of chocolate shops





products, “from bean to bar”, and a unique blend of cocoa from different countries to attain the unmistakable flavor of our chocolate bars.

Discover our high percentages of cacao Premium range and different flavors as 70% dark chocolate with Mediterranean salt, 70% dark chocolate with an intense taste of mint, 70% dark chocolate with Orange, 70% dark chocolate with caramel and sea salt, 70% dark chocolate with raspberry and 82% dark chocolate, all of them in 100g format.

These proposals are complemented by the wide range of “No sugar added” chocolate bars sweetened with Stevia, a natural sweetener, as well as the “lactose free” range and the range of products with Mediterranean almonds. Furthermore, there has been a restyling of the “No sugar added” and “lactose free” range, which makes it much more appealing and conveys an image of a quality product.

At Valor Chocolates we already export to over 60 countries of which the USA, Canada, Chile, Colombia, Brazil, Saudi Arabia, and the Philippines are our main priority markets.



**Founded in:** 1881  
**Productive capacity:** +20,000 T  
**Number of employees:** +280  
**Export markets:** At Valor Chocolates we already export to over 60 countries of which the USA, Canada, Chile, Colombia, Brazil, Saudi Arabia and the Philippines are our main priority markets  
**Products:** Chocolates: sugar free, premium and Marcona almond range  
**Brands:** Chocolates Valor, Huesitos and Tokke  
**Certificates:** ISO: 9001, IFS  
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Tel.: +34 965 89 09 50  
www.valor.es

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\*Source Nielsen (tam s4/18)



# Mielso

From the hive to your home, nature's best



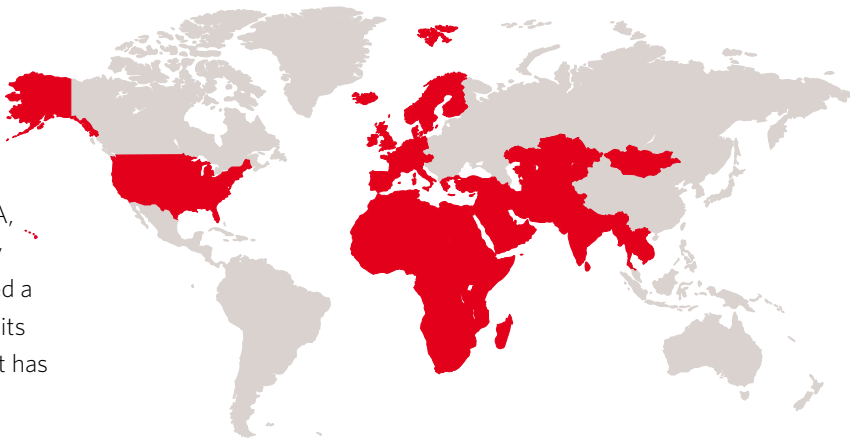
Mielso has more than one hundred years of history. The experience and knowledge gained over all these years are the best guarantee of our products' quality. Since 1910 the Sorribes family have devoted themselves to the production, selection, packaging and commercialisation of bee products from carefully selected areas all around the world.

Today Mielso is a modern and competitive company that boasts the most advanced technology and facilities, which enable us to provide our customers with the best and most complete selection of honeys, as well as an extensive range of other bee products.

Mielso has always taken an active role in communicating its respect for nature. We aim to offer our customers superior quality products, products that bring them closer to nature and which help them to achieve a balanced diet.

Our commitment to internationalisation and the diversification of markets and sale channels that started in the 70's, led to the jump from traditional company to market leader. El Brezal is a registered trademark that is well known in Spain, the EU, the USA, the Middle East, Asia and Africa. El Brezal, in harmony with its clients' and consumers' needs, has experienced a considerable evolution, adding new product ranges to its traditional selection of honeys from Spain, a range that has also been broadened with new formats.

Quality has always been the key factor of our success





It is with the advent of the fourth generation of the Sorribes family that MIELSO looks to the future. During this new period of the company's history we aim to hold the course set during a whole lifetime by Bernardo Sorribes, the current director, and capitalize and the experience gained over these years. They have made Mielso an institution of world repute within the industry.

During this new period the company aims to consolidate and broaden the scope of its already high level of internationalisation while ensuring that the most demanding quality levels are maintained to ensure that the characteristics of its natural, healthy products are preserved.

Right from the start Mielso was a pioneer in the research and implementation of technological solutions for the beekeeping industry. Notably, it was Mielso that introduced beehive transhumance to Spain so as to take full advantage of the differing flowering seasons of Spain's highly varied flora.

The company has signed cooperation agreements with the Research and Technology, Food and Agriculture Institute of Catalonia (IRTA) and is a partner of the AINIA technology centre of Valencia, of which our director, Bernardo Sorribes, was a founding partner.

In a similar vein, Mielso set up its own laboratory over 40 years ago. It is specialized in honey quality control and employs the most modern analytical techniques (physical-chemical, organoleptic, and microbiological tests, pollen and antibiotic analyses, pollutant detection) and, furthermore, it cooperates with the most prestigious accredited external laboratories in carrying out analyses to certify product quality and to detect veterinary residues (antibiotics) and pesticides. These modern testing techniques mean that the purity, quality and authenticity of our products can be fully monitored from

**Founded in:** 1970

**Productive capacity:** 8,000 T

**Number of employees:** 45

**Export markets:** UE, USA, the Middle East, Asia, Africa

**Products:** Selection of Honeys (wildflowers, orange blossom, rosemary, thyme, eucalyptus, mountain and forest); Wellness (honey with royal jelly, with ginseng, with propolis, with lemon juice, and bee pollen); World of taste (acacia honey, Yucatán honey); Organic (Wildflower honey, bee pollen); Special Limited Selection (Lemon blossom)

**Brands:** El Brezal

**Certificates:** ISO 9001:2008, AENOR IF5-2008/0036, CAECV no. CV1211 E, Kosher, Halal

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the moment we receive the raw materials, during processing and once the finished product has been obtained. All this to achieve our main objective of striving for the highest product quality and ensuring our customers' satisfaction.



# Panamar

Rediscovering the taste of bread



Panamar is a leading manufacturer and distributor of frozen dough for a wide range of bread and viennoiserie. It is geared towards satisfying its customers' needs for quality, service, care and advice. Our long history is defined by the entrepreneurial inclination of the owners, whose ancestors had already taken up the craft of baking.

The combination of craftsmanship and investing in R&D and technology has made it possible for Panamar to become a leading national company with a clear view towards international expansion. Our product catalogue, tailored to professional business strategy and consumer preferences, allows us to be at the forefront and currently offer freshly baked products at any time of the day.

Our commitment to our customers is to never lose our identity and to continue as we always have, in leadership and growth, adding value and standing out both in the business processes and the initiatives we undertake. We will continue to set ourselves new goals, investing in R&D and committing to people in order to earn our customers' trust.

Panamar is part of the Pan Star Group and has over 1,400 employees. 272 million Euros in revenue, five factories (Girona, Albuixech, Enguera, Madrid and Santander), 35 production lines and the capacity to warehouse over 40,000 pallets.

Our unique production processes, technology and respect for traditional methods come together to achieve exceptional products





Our project is based on two pillars: people – a committed and cohesive team that provides individual and comprehensive solutions – and innovation both in manufacturing processes and research into new recipes and raw materials. This allows us to respond quickly to new business opportunities and consumer needs. All company processes – production and management – are within a framework of innovation that ensures constant improvement, fast adaptation to change and differentiation in sales channels. We have unique production processes where technology and respect for traditional methods come together to achieve products with the exceptional organoleptic properties of flavour, aroma, odour and texture.

The installation of our 60,000 m<sup>2</sup> modern facilities at Enguera (Valencia) is considerable. The outstanding bread and pastry lines increase the Group's production and capacity for innovation by optimizing all processes and resources to attain the very best quality. Receiving the highest marks awarded by the IFS and BRC certificates confirms this. Our advanced technology places us at the highest level of European manufacturing and makes us a benchmark for technology and innovation. Our plan for the future is to continue adapting to the needs of the market by focusing on such factors as saving time in product handling at point of sale and continuing to develop products that meet new consumer habits, guided by concepts like health, convenience and pleasure.



**Founded in:** 2000  
**Productive capacity:** 35 production lines of bread and viennoiserie  
**Number of employees:** 1,400  
**Export markets:** USA, México, Panamá, Colombia, Peru, Chile, the UK, Portugal, Italy, Greece, Germany, Holland, Libya, Equatorial Guinea, Saudi Arabia, Kuwait, UAE, South Korea, Japan, Australia, France, Guatemala, Honduras, El Salvador  
**Products:** Precooked frozen bread and viennoiserie: white, rustic and special breads. Sweet and savoury viennoiserie. Extruded doughnuts  
**Brands:** Panamar  
**Certificates:** Highest grade of IFS and BRC certifications  
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# Alcoholic and non-alcoholic beverages



# Alcoholic and non-alcoholic beverages

The Phoenicians were the first to plant vines in Spain 3,000 years ago in the region of Andalucía. During the Christian era, Spanish wines were esteemed all throughout the Mediterranean and the North of Africa. The Spaniards brought vineyards to the Americas in the 16<sup>th</sup> century and when, in the 19<sup>th</sup> century, the phylloxera plague devastated Europe's vines, many French wine growers moved to Spain bringing with them their varieties of grapes and driving the Spanish sector.

It was not until the last quarter of the 20<sup>th</sup> century when the sophistication and modernization of production methods improved the quality of Spanish wines so considerably that they began to be considered amongst the best in the world, as countless international awards testify today.

The wine sector is extremely relevant in Spain, not only because of its economic, social, and environmental importance, but also because of the excellent international image it projects. In 2016 Spain was the third largest wine producer worldwide, right behind Italy and France. Notwithstanding, Spain has become the first country in terms of vine-growing and land devoted to its cultivation with 975,000 Has., 13% of the world's total vineyard surface. According to the data of the Ministry of Agriculture, in 2016 Spain was the largest exporter in the world in terms of volume with 2,226 million litres; and

the third in terms of revenue, with exports reaching 2,635 million Euros.

Spanish wines are the fruit of a terrain and climate with very special qualities. The amount of sunshine to which the vines are exposed (2,000-3,000 hours a year), the long warm summers, the mild winters, the adequate rainfall and a great variety of terrain, favour the wine harvest and guarantee excellent quality grapes.

Spain boasts a broad range of native grapes (Tempranillo, Garnacha, Bobal, Monastrell, Verdejo, Albariño, Moscatel, Listán, Pedro Ximénez, etc.) which, alone or blended with other well-known local and international varieties, make wines of great intensity, aroma and nobility. These, according to the ageing method and its duration can be classified as young, or wines with no minimum ageing time; Crianzas (24 months ageing for red wine and 18 months for white or rosé, 6 months of which aged in caskets); Reservas (with a total ageing time of 36 months for reds, of which at least 12 months in caskets; and 24 months for whites and rosés, the first 6 months of which in caskets); and Gran Reserva (with a minimum ageing of 60 months of which at least 18 months aged in caskets for reds; and in the case of whites and roses a total of 48 months of which the first 6 months in caskets).

Depending on their location and the degree of protection (the legislation and controls they must comply with), they

Spain is the 3<sup>rd</sup> largest producer of wine worldwide, the largest exporter, and occupies the 1<sup>st</sup> position in terms of vine-growing

are divided into: wine with no specific requirements; wine with Protected Geographical Indication (P.G.I.) or Vinos de la Tierra (from a specific region, of which there are 41); and wine with Protected Designation of Origin (P.D.O.), which account for a total of 70 and come from specific regions; they are made with local grapes and aged locally. Their regulations are very strict. Two of them are Qualified Designations of Origin (Q.D.O.): Rioja and Priorat. Their regulations are even tougher and their quality control stricter. Then come 7 Vinos de Calidad con Indicación Geográfica and the single-estate wines or Vinos de Pago (V.P.), produced in a unique terrain with such unusual qualities that they are set apart from all other wines. There are only 14 of them.

Spain is also well known for its Cava - sparkling wines made using the *méthode champenoise* - and for its fortified wines, with an alcoholic content between 15% vol. and 22% vol., among which Jerez wine stands out. In 2016, 4,000 wineries - mostly small and backed primarily by Spanish capital - produced 39.3 million hectolitres of wine.

Because of the peculiarities of its terrain and its humid climate, Asturias (in the North of Spain), is the only region where apple trees prosper instead of vines. There are documents testifying that apple farming dates back to the year 781 A.D. Cider manufacturing requires a combination of three types of apples: acidic (45%), sweet-acidic (25-30%) and bitter-sweet (10%).

Asturias cider is regulated by a Protected Designation of Origin (D.O.P.) which uses only native apple varieties. Its consumption is closely linked to social and festive gatherings. The cider pourers, *escanciadores*, serve the cider by raising their arm above their head and pouring the cider into a glass far below so that it becomes oxygenized and froths. Very little is served, and it is drunk in one sip. Natural cider is a fresh, acidic and slightly sparkling beverage.

Although the Egyptians invented the distillation process, it was paradoxically the Arabs who improved it. The earliest



reference made to the manufacture of spirits goes back to the Arab physician Abul Kasim, in the 10<sup>th</sup> century A.C., and curiously the process has not evolved much since then. Actually, words such as alembic and alcohol are originally Arabic. Consumption of spirits in Spain plays a strong role in our heritage and way of socializing.

Presently, Spain has 19 Geographical Indications (GI) registered for its spirits, occupying the 3<sup>rd</sup> position in Europe in this respect (after Germany and France). Each one of these GIs has very specific regulations for the production of spirits such as Brandy from Jerez, Pacharán from Navarra (sloe gin), Orujo from Galicia (grape marc), or Gin from Mahón.

The sector is quite relevant for the Spanish economy, with a turnover over of 7,400 Mill. Euros and over 300,000 people (directly and indirectly) employed by the industry. Around 80% of all liquor produced in Spain is made by small family-owned businesses. In 2017, 3,600 of them were officially registered as artisanal manufacturers. A fun fact is that of the 82 million tourists that visited Spain in 2017, 13% of their budget went on purchasing alcoholic beverages, mostly spirits.

But not all Spanish beverages are alcoholic. The trend towards healthy and natural products has boosted mineral water consumption. Coming from rain and snow filtered

Of the 82 million tourists that visited Spain in 2017, 13% of their budget went on purchasing alcoholic beverages

by the soil, this kind of water contains numerous healthy minerals. In order to guarantee the original purity of bottled water, the sector is subject to the tightest quality and safety controls.

Spain is the 4<sup>th</sup> mineral water consumer in the EU (126 litres per capita). The sector consists of about 100 companies dotted around the entire country bottling over 5,800 Mill. litres, employing 4,500 people and grossing Euros 1000 Mill. a year. 97% of production is natural mineral waters, of which 96% is still and the remaining 4% is carbonated.

# Bodegas Ayuso

A style that made history



In 1947 Fermin Ayuso Roig founded Bodegas Ayuso in Villarrobledo, an ideal location for vine growing, whose climate and soil make this area the unbeatable motherland of great wines. Nestled deep in La Mancha, lands where Cervantes must doubtlessly have seen Don Quixote riding Rocinante, lie some modern and efficient premises, equipped with cutting edge technology.

Ever since our foundation up until the modern day, we have availed ourselves of the most refined winemaking and conservation techniques, without ever losing sight of the artisan tradition and care that wine production and ageing implies.

From the beginning until 1961, the winery focused its efforts on the production and sale of wine in bulk.

In 1961 we started selling bottled wines, turning the basement of one of the units into a cellar with a capacity of 12,000 Bordeaux style oak casks. It was the ideal place to complete the ageing process, since it offered the right levels of darkness, silence, the ideal temperature and relative humidity for the wines to rest in that tranquilizing slumber which yields exquisite wines.

This was the first unit to age Estola, the foremost *Reserva* wine from La Mancha, result of the meticulous selection of the finest Cencibel vines, which after a careful maceration

All our premises have been designed to reduce energy consumption, take advantage of alternative energy sources, and preserve the environment's sustainability





and fermentation process, is first aged in oak casks and then in bottles.

The bottled wine was first sold on the Albacete and Jaén market, after which both the commercial network and product range were broadened. Currently the network consists of over 200 distributors, dotted all across the Spanish territory.

In 1985 we began our export activities on the international market, and we currently export to different countries across the five continents.

60 gold medals and 100 silver medals, earned at the most prestigious wine tastings, vouch for the excellence of our brands: Estola, Finca los Azares, Castillo de Benizar and Abadía del Roble.

In July 2014 we started work on the construction of a new cellar, just a few meters from our current one with which it is connected. With a surface of 60,000 m<sup>2</sup>, the built-up area takes up 15,000 m<sup>2</sup> and has an overall storage capacity of 35 million litres. Its budget exceeds 20 million Euros and the work was completed at the end of 2017.

All our premises have been designed to reduce energy consumption, take advantage of alternative energy sources, and preserve the environment's sustainability. The entire project has been audited, complying comfortably with all the most demanding guidelines: BRC, IFS etc.

The winery has 350 hectares of vineyards, about 20 years old, with the finest varieties of grapes such as: Tempranillo, Cabernet Sauvignon, Merlot, Petit Verdot and the whites Verdejo, Chardonnay and Sauvignon Blanc.



## BODEGAS AYUSO

**Founded in:** 1947

**Productive capacity:** 15 million bottles annually

**Number of employees:** 50

**Export markets:** Canada, Mexico, Germany, Finland, Sweden, Switzerland, China, Japan, Iceland, The Netherlands, Dominican Rep., Puerto Rico, United Kingdom, United Arab Emirates, Slovakia, Poland, France, Latvia, Lithuania, Austria, Cyprus, Denmark, Taiwan, South Korea, Belgium, Russia, Brazil, Cambodia & USA

**Products:** Designation of Origin and non-Designation of Origin bottled wines

**Brands:** Finca Los Azares, Estola, Castillo de Benizar, Abadía del Roble, Matas Verdes, Vega Dorada, Castillo de Utrera, Don Nino

**Certificates:** La Mancha Designation of Origin

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## Destilería Siderit

The purest gin for the purest moments



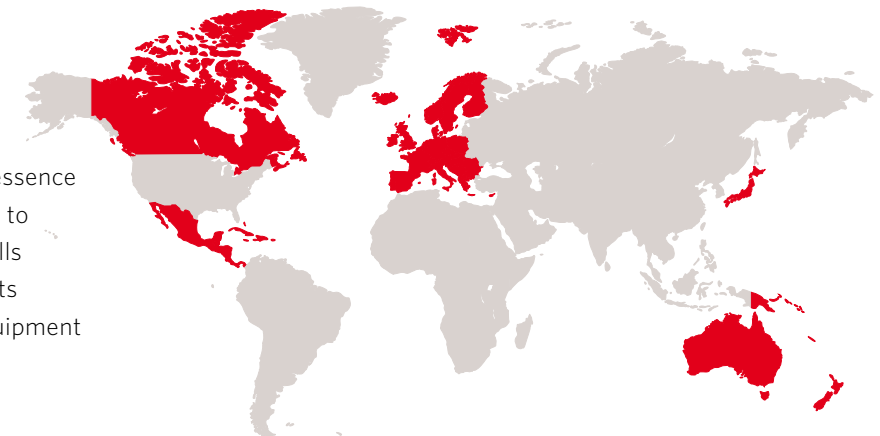
The Siderit Distillery is a micro-distillery located in Cantabria, a region in Northern Spain bathed by the Cantabrian sea and surrounded by the Picos de Europa mountains where we distil handcrafted ultra-premium London Dry Gin, Vodka Lactée and Vermouth.

Siderit is a young distillery with a story to tell. We are creators of distillates with a Cantabrian soul. One of the botanicals used in the manufacture of the gin is Syderitis Hissopifolia which lends its name to the Distillery. This plant is endemic to Picos de Europa and makes Siderit an unequalled and unique gin, enhancing its local character.

Since its beginning in 2013, Siderit has been creating, rather than producing, spirits. Any creation process implies innovation and R&D, fields in which Siderit is a pioneer in many ways.

Our most outstanding differentiating and innovative element is the use of reflux fractional distillation glass equipment, entirely made of borosilicate glass. This equipment combines the essence of a traditional alembic with the latest technology to obtain a final product which is free of foreign smells or tastes and devoid of any trace of impurities in its analytics. One distillation in the Siderit's glass equipment is equivalent to 5 traditional distillations in metal alembics.

What sets us apart? Distillation in glass equipment to obtain the maximum purity; 1<sup>st</sup> class raw materials (rye alcohol; 100% natural botanicals, some of which local; the weakest mineralization spring water in the Iberian Peninsula); Prestigious International awards





Siderit launched its first bottle only 5 years ago. One year later, our Vodka Lactée (the first vodka in the world made from milk) was awarded the gold medal in the prestigious San Francisco World Spirits competition, launching the Siderit brand internationally. To this, we have added many other prizes, among which we are proud to highlight the gold medals in the International Wine & Spirit Competition IWSC – The Best Gin & Tonic of the World –, London; the Concours Mondial de Bruxelles; the Kuala Lumpur Gin Jubilee and the 3 gold stars awarded by the iTQi.

What sets us apart? Distillation in glass equipment to obtain the maximum purity. First class raw materials: rye alcohol – just like the first gins produced in the Netherlands in the 17th century –; 100% natural botanicals, some of which are only found in Northern Spain, conferring personality and identity to our spirits; and blending with the weakest mineralization spring water in the Iberian Peninsula thus providing stability and purity for our spirits. 3 months settling: we let nature work at its own pace, guaranteeing long-term stability of Siderit distillates. And finally our international prestige awards which we receive yearly.

Our spirits are exported to over 30 countries in all continents. We are a micro-distillery able to manufacture up to 1 Mill. l/year with an importer-oriented flexibility and an excellent response time, which allows us to adapt to the different markets.

Our policy is to offer the consumer an elegant and pure range of ultra-premium spirits with personality and character that meet the highest quality standards, reason for which we apply a continuous R&D process in the distillery.

**Founded in:** 2012

**Productive capacity:** up to 1 Mill l/year

**Number of employees:** 12 employees (plus freelances)

**Export markets:** over 30 countries, among which Belgium, The United Kingdom, Mexico, Canada and Malaysia stand out

**Products:** ultra-premium spirits and vermouth

**Brands:** London Dry Gin Siderit CLASSIC (neutral with aftertaste), Gin Siderit HIBISCUS (floral), Gin Siderit Gingerlime (citric), Vodka Lactée Siderit (the first Vodka in the world to be manufactured from milk!), Vermouth Siderit (without added sugar)

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And finally, the most important asset of Siderit is our team's passion for our products. We invite you to meet us in our facilities and to enjoy "the best gin & tonic in the world". Innovation, tradition and craftsmanship are the perfect Siderit blend.



# González Byass

A wine family

Wine and family. Five generations of the González family devoted to making wine, sherry, brandy and premium spirits. González Byass' history begins in 1835 when Manuel María González Ángel decides to become a winemaker and starts his company in Jerez de la Frontera. His motto, both in life and in business, was consistency, a value that the Wine family upholds to this day.

Ever since its origins, González Byass has focused its efforts on export, with the United Kingdom being the destination of the company's first sales. Currently, the house brands are available in over 100 countries throughout the world, and the company has subsidiaries in Spain, England, Mexico and The United States, as well as its own business teams to give support to local distributors in China, Germany, Brazil and Canada.

In the 1980's González Byass sets itself the goal of developing quality wines and begins including wineries from landmark areas in its portfolio in order to faithfully represent the diversity of Spain's wine making regions and other wine growing regions of the world. Bodegas Beronia – in Ollauri, La Rioja –, Cavas Vilarnau – in Sant Sadurní d'Anoia, Barcelona –, Finca Moncloa – in Arcos de la Frontera, Cádiz –, Finca Constancia – in Otero, Toledo –, Viñas del Vero – in Somontano, Huesca –, Beronia Verdejo – in Rueda, Valladolid – and Pazos de Lusco – Salvaterra de Miño, Pontevedra – are a few examples.

González Byass stands, for the second consecutive year, as the best Spanish wine cellar in the world



# #SherryRevolution





The company crosses over to the New World with the inclusion, in 2016, of the family-run Chilean winery Veramonte and the purchase, in 2017, of Pedro Domecq's brandies and wines.

One of the challenges that González Byass has taken on over the past years has been that of developing top range spirit brands such as The London Nº1 gin, Druide vodka and Solera Gran Reserva Lepanto brandy. The latest additions to the range have been the soft and provocative English gin Mom, and the Nomad Outland Whisky, a blended whisky aged first in Scotland and then in Jerez. Other brands that the family develops as part of this premium range are La Copa Vermouth, Chinchón anisette liqueur, and the Granpecher and Granpomier fruit spirits.

Innovation and sustainability are two pillars of González Byass' core beliefs. 1955 saw the creation of CIDIMA, the first private research centre in Spain devoted to managing the quality, development and innovation of wine making processes. Furthermore, González Byass proved its commitment to the environment with the "5+5 Caring for the planet" scheme.

Over the last few years, González Byass's victories at contests all over the world have consolidated its position as a landmark of quality Spanish wine both nationally and internationally. Specifically this Wine family was ranked best wine maker in the 2013, 2014, 2016 and 2017 "Top 100 wine maker and growers of the World" complied by the WAWWJ (World Association of Writers and Journalists of Wines and Spirits). González Byass was also awarded the 2017 Len Evans Trophy, given to those wine makers that have achieved remarkable results over the last five editions of the International Wine Challenge.



**Founded in:** 1835

**Export markets:** Over 100 countries

**Products:** Wines, Sherry, brandy and premium spirits

**Brands:** Tío Pepe, Bodegas Beronia, Viñas del Vero, Blecua, Secastilla, Finca Constancia, Finca Moncloa, Cava Vilarnau, Beronia Rueda, Pazos de Lusco, Veramonte, Ritual, Primus, Neyen, Pedro Domecq, The London Nº1, MOM, Nomad Outland Whisky, Druide, Lepanto, Soberano, Anís Chinchón de la Alcoholera, Vermouth La Copa and the fruit spirits Granpecher and Granpomier

**Certificates:** ISO 9.001 y 14.001

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González Byass' future is founded on consolidating its wines' quality, the company's commitment, developing international markets and promoting wine tourism. A future rooted in upholding the company values of family tradition, respect for the environment and the commitment to quality and innovation.



## Sidra Mayador

The inventor of cider was a humble apple presser



**D**. Manuel Busto founded the company Manuel Busto Amandi S.A. in Villaviciosa (Asturias) in 1939, manufacturing the typical Asturian beverage, natural cider, under the brand name M. Busto. Villaviciosa is the biggest cider production region in Spain due to a microclimate that is ideal for growing apple orchards. Here we collect the most sought after fruit: acidic, sweet and bitter apples from Asturias.

For centuries this region has produced cider, the result of alcoholic fermentation of apple juice. Asturias cider is served in a unique method called *escanciado*: holding the bottle high up and the glass as far below as the arms can reach, so that when the flow of liquid hits the glass the cider breaks up and is oxygenated, giving it its characteristic flavour. A quantity no greater than three fingers is served in a wide fine glass called *culín*, that must not be drunk completely. A little must be left over so it can be thrown away from where one has drunk, thus rinsing the glass for the next drinker (2 or 3 drinkers usually share the same glass).

In 1966 we added carbonated ciders to our portfolio under the brand name El Mayador – the person who presses the apples with a *mayu*, a type of club, to make the juice that, once fermented, will become cider – becoming a role model within the sector. The slogan: “*De la sidra el inventor fue un humilde mayador*” (the inventor of cider was a humble apple presser) still lives on.

Our investment in technology has allowed traditional apple presses to live alongside latest generation presses and for our products to be bottled using the most technically advanced methods





Ever since its origins, our family business, currently under the management of its third generation, has kept up its entrepreneurial and progressive spirit as far as new technology is concerned, but has maintained special care in the apple selection and the traditional manufacture of its products.

In 2000 we entered a new phase with the opening of our new premises located in a natural setting surrounded by great expanses of apple orchards. Of the 40,000 m<sup>2</sup> they take up, 9,000 m<sup>2</sup> are buildings for apple pressing, cellars, bottling plants and storage.

Our investment in cutting edge technology has allowed the traditional apple presses to live alongside latest generation presses and for our products to be bottled using the most technically advanced methods. This has also allowed us to obtain quality and food safety certificates as well as others of a religious nature (Kosher and Halal), thus offering our clients further guarantees.

Our range of ciders includes traditional cider as well as carbonated ciders which satisfy the great interest generated by this beverage due to its low alcoholic proof, its spark and its lightness; and an alcohol free range, with carbonates fruit juices with no added sugar.

Our policy of constant improvement is based on: quality, service, care for the environment, health and safety, teamwork, innovative management, manufacturing process and supply chain. This allows our products to reach the market with complete food safety guarantees and to face current and future demand.



**Founded in:** 1939

**Productive capacity:** -

**Number of employees:** 22

**Export markets:** 75 countries across 5 continents

**Products:** Cider, sparkling fruit juices, apple vinegar

**Brands:** Ciders: M. Busto, Mayador, El Mayu;

Carbonated fruit juices: May and Xana; Vinegar:

Mayador- M.BUSTO

**Certificates:** ISO 9001, IFSv6, Kosher (KLBD), Halal

**Contact:** Consuelo Busto. Manager

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## Sant Aniol Mineral Water



Volcanic spirit

**5** 5 meters deep, surrounded by 600 hectares of virgin land in the Llémena valley, a wilderness of lush vegetation and sleeping volcanoes in the Garrotxa region, the spring of Sant Aniol has been flowing for thousands of years.

The incomparable origin of Sant Aniol Water gives it unique characteristics with excellent quality and an unparalleled degree of purity, something that has been ratified by numerous international awards.

Our strict quality control and our production process exempt of human contact, allows us to guarantee that both the extraction and bottling process are free of contaminants, so that the natural mineral water we offer on the market is in its purest state.

Sant Aniol is present in some of the finest hotels and restaurants not only in Spain, but all around the world, since we have been exporting for over 10 years with excellent results, with our main markets being as far flung as Japan, the United States, Australia or China.

The quality of the water that flows from the spring of Sant Aniol comes from a lava sediment and volcanic rock filter that is thousands of years old





The quality of the water that flows from the spring of Sant Aniol comes from a lava sediment and volcanic rock filter that is thousands of years old. A legacy perceived in every drop that, not in vain, has twice earned it the Superior Taste Award, an annual prize given to the best international food products.

Sant Aniol water is Natural Mineral Water. Obtaining this designation has meant passing countless requirements and the most exhaustive analysis to demonstrate its perfect balance and quality and the maintenance of its volcanic purity from the moment it emerges from the spring until it flows out at the consumer’s table.

It is worth highlighting its 7.3 PH and its rich and balanced chemical composition with an abundance of minerals that improve your health and wellbeing. Its high calcium content helps the development of your bone structure, and is therefore highly recommended for children, teenagers and pregnant or lactating women. Furthermore, its calcium as well as its low level of sodium and chlorine help to reduce hypertension. Thanks to its high level of magnesium and bicarbonate, Sant Aniol contributes positively to the correct function of the nervous system and gastric digestion aiding intestinal transit.

For these reasons Sant Aniol is considered something more than simple H<sub>2</sub>O.



**Founded in:** 1993  
**Productive capacity:** 60 Mill. bottles a year  
**Number of employees:** 30  
**Export markets:** Japan, USA, Australia, Hong Kong, Germany, Holland, Belgium, France, China, the United Kingdom, India, Italy, Austria, Lithuania, Poland, UAE, Saudi Arabia  
**Products:** Still natural mineral water and carbonated natural mineral water  
**Brands:** Sant Aniol  
**Certificates:** FSSC 22000, CSOR (Oliver Rodés)  
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