



SPAIN'S

food manufacturers

A PRESTIGE BOOK



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The provinces marked in red refer to the areas where the companies represented in this book manufacture their products.



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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 rearing livestock, (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 8th exporter worldwide and the 4th in the EU). A journey through Spain inevitably implies a journey through its food industry.

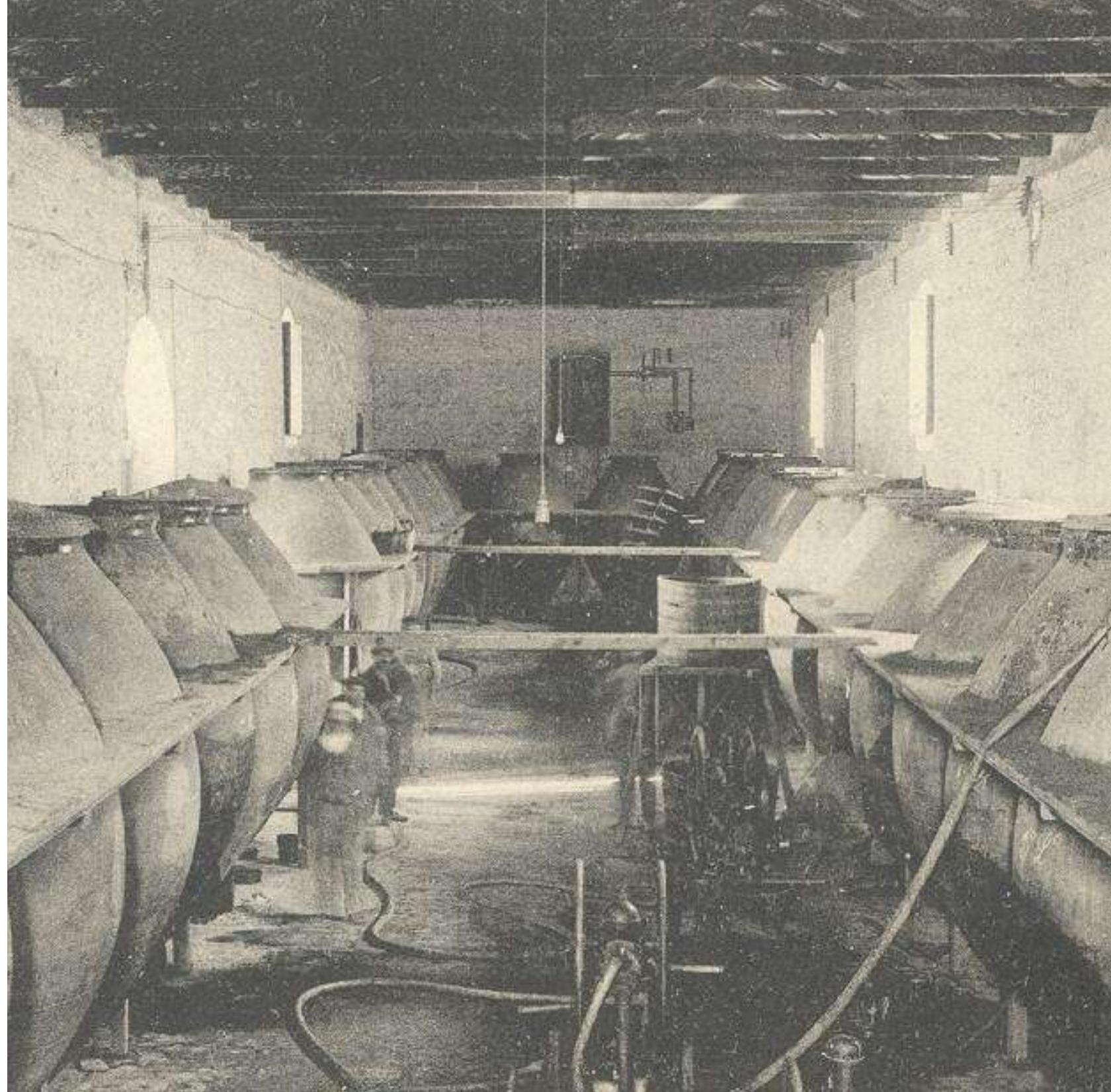
The great variety of cultures who have passed through Spain over the ages have left an indelible mark on food processing and conservation techniques, many of which are still in use today. The first settlers of the Iberian Peninsula, the Celtiberians, manufactured cold meats and cured ham as far back as the 3th century B.C. And although manufacturing techniques have evolved considerably since then, we can say that 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.

But it is to the Romans that we owe some of our most characteristic products. 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 3rd 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 food conservation methods such as salting fish, brine and vinegar, methods that are used extensively in modern Spanish canning industry.

Many centuries after the fall of the Roman Empire came Arab splendor. This civilization, which inhabited Spain for 8 centuries, was our teacher in manufacturing 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 processing sugar cane as well as the manufacture of a number of sweets. Many of them are still an integral part of our cuisine and enjoyed internationally as is the case with marzipan and nougat.

The discovery of America was a turning point for food consumption throughout the planet. From America the Spaniards brought products like tomato, potatoes and paprika. Where would the food industry be without these





products? They were also the ones who brought chocolate from America, sweetened it for the first time and sold it, spreading 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.

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 coming from a sunken French ship off the coast of Galicia. Thus the sterilization technique was implemented, a true revolution for the Spanish canning industry and for the fish and seafood sector, beginning its unstoppable growth that led it to reach a position of worldwide leadership. The fruit and vegetable sector also benefited from allowing it to process and distribute its products beyond our borders. Today Spain is one of the top canned 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 opened the pathway for the creation and expansion of an entire sector of frozen and refrigerated products which has an ever growing importance in our industry.

And in the 20th century the rural exodus brought new changes in 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 food. This accelerated mechanization giving way to the

Spain's unequalled conditions for agriculture and rearing livestock, has fostered the development of an industry that nowadays holds one of the top positions worldwide

implementation of the latest technological advances in food manufacturing.

Spain's entry in the EU (1986) implied the great step into foreign markets. From that point onwards exports have grown incessantly. On the other hand, the influx of foreign capital and know-how allowed for the fast modernization and globalization of the industry.

Having entered the third millennium, what distinguishes the Spanish industry is the considerable 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 on client satisfaction.

A strategic sector of the Spanish economy

The Food and Drink Industry is a key piece of the Spanish economy. During the economic crisis, this sector has remained strong, growing and solidly driving the economy. It is currently the number 1 industrial sector in Spain in terms of revenue, the 4th in Europe (after Germany and Italy), and the 8th in the world.

In 2012, the nearly 30,000 companies that make up the Industry closed the year with net sales of euros 86,298 Mill., equivalent to 7.6% of the Spanish GDP. Furthermore, the combined revenue of all the players involved in the food sector, namely the agriculture industry, drinks and distribution (including hotels and restaurants) accounts for over 20% of the country's 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: terrain, 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.

The Industry employs 439.675 people, equivalent to 20% of industrial employment and 2.5% of national employment. Given that most of the factories are located close to their supply 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, as a key link in the food and agriculture chain, it is responsible for the supply of over 120 million safe, quality meals every day, 2/3 of which in homes, 1/3 of which in hotels and restaurants.

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

The agro-industry has also favored the development of regional specialties protected by Regional Designations (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. Currently exports account for about 40% of industry sales - which in 2012 reached euros 22,078 Mill., amounting to 10% of all Spanish exports.

The most sought-after products abroad are, in the following order: wine, pork meat and olive oil. These are followed by frozen fish, fruit juices, bakery products, spirits, olives, canned fish, and soya oil.

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, as well as food traceability and safety. Life sciences and technology have given way to 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

The Food and Drink Industry is a key piece of the Spanish economy. It is currently the No. 1 industrial sector in Spain, the 4th in Europe, and the 8th in the world

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



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

In Spain gastronomy, food and tourism are closely interlinked. Spanish gastronomy has always had a playful edge, which goes further than its merely nutritious function and is related to 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 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 foodies. 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 three sectors combined are crucial for the Spanish economy, as they account for 25% of GDP and employ over 3 million people. Both the food and tourist sectors have remained strong and even grown in spite of the crisis. Specifically, the Food and Drink Industry, grossing 86,298 Mill. in 2013, has experienced some of the biggest growths of the EU.

Some figures will suffice to prove our country's position as world food power. It is the number 1 producer of olive oil and olives in the world and the 3rd wine producer. It holds 1st place as fish producer in the EU and the 5th as pork meat

exporter. Its exports grew by double digits since 2010 reserving 24% of its production for export.

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. Proof of this is the fact that there are currently 160 types of food and 143 wines and drinks, which hold a Designation of Origin (D.O.) or a Protected Geographical Indication.

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. Suffice it to say that 3 out of the 10 best restaurants in the world in 2013 were Spanish: El Celler de Can Roca, Mugaritz and Arzak. In this sense Spain is the only country in the world to place three of its chefs on this exclusive podium. In 2014 the prestigious Michelin guide awarded 8 restaurants in Spain three stars, 17 restaurants two stars and 134 one star, with San Sebastián (Basque country) in the 2nd place worldwide in terms of Michelin stars per capita.

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 in the world for four years running, something nobody else has ever equaled until now. He was also considered by TIME magazine as one of the 100 most influential people in the world in 2010. 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 extremes without ever losing sight of their roots.

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 euros 120,000 Mill. Another significant figure of Spanish gastronomy are the sector's 300,000 establishments, shared between restaurants, bars and catering companies. As a curiosity it is interesting to note that Spain is the 2nd country in the EU in terms of bars per capita, only beaten by Cyprus. According to a poll made by an important European hotel chain, Spanish cuisine is currently the 2nd favorite cuisine in Europe after Italian.

Spain has been a favorite holiday destination for years. In 2013 it held the 3rd place worldwide with over 55 million visitors a year, something for which it grossed euros 130,000 Mill. What is new is that the number of international tourists who come to Spain for the food keeps growing. In 2013, 7.4 million people said they had travelled to Spain for gastronomic reasons, 32% more than the previous year. 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

In 2013, 7.4 million people said they had travelled to Spain for gastronomic reasons

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 people 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 Andalusia, 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 Andalusia, or bigger dishes, as in the center of the Iberian Peninsula. In the north and especially in the Basque country, La Rioja and Santander they have become an institution. 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 personality of its people, has its own. We could say that Spanish gastronomy is actually 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 there is not a picnic without one. It also allows for many variations, like 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 orchard. 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 is 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. Furthermore, almond-based sweets like turrón (nougat) are also extremely popular both nationally and abroad.

Andalusia, 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 voluptuous 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 with great character.

The west of the Iberian 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 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

A journey through Andalusia will delight the visitor with seas of olive groves, so it should come as no surprise that fried food is one of its specialties

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 in the middle of 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 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 with 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.

Galicia and the Cantabrian coast are a world apart. Here there was hardly any Arab penetration, 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 allowed for 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 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

The Spanish gastronomic revolution began in the Basque Country, where a great number of master chefs are found

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 Castellán 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, 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 of Catalan cuisine has been spectacular, producing chefs of the stature of Ferrán Adrià, Joan Roca or Carme Ruscalleda (all of them with 3 Michelin stars)

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 woman chef with the most 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 Aragon 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 surge 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 (boiled potatoes 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 beyond our borders. 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.



Olive oil



Olive oil

Olive farming began over 5000 years ago in the Middle East. The Phoenicians and Greeks introduced it to the Iberian Peninsula, but it was the Romans who extended its farming and improved oil production techniques. Not only was Hispania the primary oil producer of the empire, but its oils were also considered the highest quality.

It was used to oil athletes and kings, as a beauty and hygiene product, for burning in lamps and temples or as lubricant for agricultural tools. The Arabs perfected the oil extraction technique. Indeed the Spanish word for oil, *aceite*, comes from the Arab *al-zait* meaning olive juice. Centuries later it was the Spaniards who, during the 16th and 17th centuries, brought olive trees to America, extending its farming throughout many regions of the continent.

The olive tree, a typically Mediterranean tree, requires a lot of sunlight, mild winters, warm, dry summers and rain during the rest of seasons. Its growth is very slow and it does not yield fruit until at least 5-10 years since its plantation. It reaches maturity at 20 and attains its splendor between 35 and 100-150 years of age. It can live up to hundreds of years but the quality and quantity of its olives decreases dramatically.

The variety of flavors and aromas of the olive oil is due to the diversity of climates and microclimates in our country

and to the diversity and richness of our soil, something which does not occur in any other producing country. To this we need to add the over 260 varieties of olives in Spain, among which the Picual - which accounts for 50% of olive farming in Spain - Cornicabra, Hojiblanca, Arbequina, Lechín de Sevilla, Verdial, Empeltre and Picudo varieties stand out.

The result of such a variety of olive trees, climates, altitudes and soils is an extremely diverse range of olive oils with different sensory characteristics. Thus we can find smooth and sweet oils, oils with strong character and body and even bitter or spicy oils. But the quality they all share is their fruity and intense fragrance.

Olive harvesting - towards the end of autumn and the beginning of winter -, can be performed manually, hitting the tree with long rods, or using machinery which shakes the tree to release its fruit. Once collected, the olives are taken to the mill or oil press for processing during the 24 hours following their harvest. Only this way can maximum quality oil be obtained. Once the olives have been cleaned of twigs and washed they are pressed into a paste.

In the traditional oil extraction process, the paste is placed in baskets that are then pressed to obtain an oily juice, composed of oil and water. Once decanted the oil and water separate naturally due to their difference in density. Another method is the continuous system or centrifuge separation.

Spain, with 300 Mill. olive trees, is the first producer and exporter of olive oil in the world

One liter 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. It is fundamental that during the process the temperature does not exceed 35°C. Between 4 and 5 Kg of olives are necessary to make 1 liter of olive oil.

The olive oil is then stored in tanks made of inert materials such as stainless steel or glass tiles until its sale. In order to let the oil mature and prevent oxidization it is kept between 15° and 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 virgin olive oil is completely mechanical.

The main olive oils on sale are extra virgin olive oil (maximum acidity 0,8°); virgin olive oil (2°) and olive oil (1°), made by refining virgin olive oil. 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 oil producer in the world. The famed area (over 300 Mill. olive trees across an area larger than 2 Mill. hectares) accounts for 25% of all the olive farming surface worldwide. Its average annual production is 1.1 Mill. T, reaching 1.6 Mill. T during recent campaigns. By region, the production is shared between Andalusia (80%), Castile-La Mancha (7%), Extremadura (5%), Catalonia (3,5%) and the rest of Spain (4,5%).

Furthermore Spain is the number 1 exporter worldwide, reaching 128 countries across 5 continents. In the past 10 years we have exported a yearly average of 460.000 T, reaching as much as 875.500 T. in some campaigns. This is due to our oils' outstanding quality, subject to the strictest controls both on behalf of the producers themselves as of the competent authorities. There are currently 9 extra virgin olive oil Protected Designations of Origin: Baena, Sierra de Segura, Sierra Mágica, Priego de Córdoba, Sierra de Cazorla, Les Garrigues, Siurana, Montes de Toledo, Bajo Aragón and many others in the process of being recognized.



Aceites Valderrama

Environmentally friendly ecological oils

Aceites Valderrama is the brainchild of Jose I. Millán Valderrama, whose family has been cultivating olives for olive oil production since 1853. He spent his childhood surrounded by olive groves and at the age of 25, got involved with computer science. He was the director of a German company where he learned and applied three basic business concepts: enthusiasm, a job well done and constant innovation.

This experience put to use in olive cultivation, and a passionate team of motivated people, gave rise to the range of Valderrama extra virgin olive oils found today on the world's best tables. This is seen in the many testimonials from distinguished restaurants including more than 80 Michelin star restaurants throughout Europe, Asia and America. The excellent quality of Valderrama extra virgin olive oils has been acclaimed by such renowned media as the Washington Post in the U.S. and Japan's famous culinary magazine CHEF91.

Valderrama olive oils are unmistakable for their aroma, which carefully preserve the memory of the field and fruit in the bottle; for the natural freshness of a product cold-pressed at 19°C/66,2°F just one hour after being picked; and for the delicate, smooth, clean, balanced and long finish that enhances the flavor of foods.

Valderrama's philosophy and mission is to produce the highest quality extra virgin olive oils from year to year. To

Our philosophy is to produce extra virgin olive oils of the highest quality, making a better oil every year





accomplish this it is essential that the oil be produced from healthy olives at optimal ripeness, and that they come from our olive farms in Cordoba (370 acres) and Toledo (425 acres), agriculture-friendly environments where we employ ecological farming methods and the most modern water, energy and fertilizer optimization techniques. Consequently, as of next year, all of our oils will be certified organic.

We grow 6 varieties of olives at our farms: Arbecuina, 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 from the time the olives are picked in order to make 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 polyphenols and fatty acids with 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 thereby obtain the best aroma from each variety.

We design our single varietal olive oils at Valdeerrama to fit every food and culinary use, especially for salads, fish, pasta, grilled or fried meat.



Founded in: 2001

Productive capacity: 350 T

Number of employees: 20

Export markets: U.S.A., Japan, UK, China, Holland, Germany, South Korea, Sweden, Belgium

Products: Extra virgin olive oil. Single varietals: Arbecuina, Hojiblanca, Picudo, Ocal, Picual and Cornicabra. Organic extra virgin oils. Smoked olive oil. Natural truffle oil

Brands: Valdeerrama, Don Millan and Oleum del Molino

Certificates: IFS, BRC Y FDA

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Acesur – Aceites del Sur

The tradition of innovation

Unless one innovates one makes no progress.
One who does not respect tradition has no principles.

At Acesur it has been our “tradition to innovate” since 1840. Aware of the importance of understanding and maintaining sustainability with an eye to future generations, our activity revolves around promoting new systems and innovative processes as well as developing products of the highest quality that, day after day, become healthier and more sustainable without ever losing our traditional values.

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

With over 170 years’ experience, the Acesur group has become an expert in the olive grove’s complete management cycle. This shows in everything we do. In the 7 plants spread across Andalusia 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 and the production and distribution of vinegars, mayonnaises, sauces, dressings and pastas.

Being leaders in many of the over 100 countries to which we export our products, has made the international market account for approximately 40% of our revenue





Acesur distributes under more than 20 brand names - most notably La Española, Coosur and Guillen - our top quality products for both the Spanish market and for export. We can boast the most complete range in our sector.

In addition, through our Enersur division, Acesur is the unquestioned leader in its sector regarding industrial activities in the management of residues coming from the olive groves, biomass production, cogeneration and production of biodiesel.

As a result of being a market leader in many of the 100+ countries to which we export our products directly, the international market accounts for approximately 40% of our revenue. We are growth leaders in exporting bottled Spanish olive oil and are among the top four major exporters and bottlers of olive oil in the world. We have a relevant presence in important markets such as Australia, Germany, Russia and the United Kingdom.

Our brand La Espanola is established as the Spanish oil leader with the highest sales in Latin America, placing itself in a privileged position in more than half of the continent's countries including: Brazil, Columbia, Ecuador, Paraguay and Peru. Our subsidiaries in the USA and Brazil have allowed us to secure our position in these markets. Furthermore, Acesur has a very relevant presence in a wide-range of high growth markets such as China, India, New Zealand and Saudi Arabia.



Founded in: 1840

Productive capacity: Volume of oils and sauces sold (2013): 170 Mill. l (over 200 Mill. units sold).
Annual refinement capacity: 175.000 l

Number of employees: 550

Export markets: 100 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, Columbia, Singapore, Russia, Finland, Ecuador, Dominican Republic, Sweden, Norway, Hungary, Slovakia, Taiwan, Pakistan, New Zealand, Czech Republic, Iraq, Iran, Philippines, Indonesia, Panama

Products: Extra virgin olive oil, olive oil, olive pomace oil, sunflower oil, grape pip oil, corn oil, soya oil, blended, sauces, mayonnaise, condiments, vinegars and pastas

Brands: Over 20 brands, among which it is worth noting La Española, Coosur, Guillén, Villablanca, La Andaluza and Altivo

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

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www.acesur.com



Cortijo de Suerte Alta

100% organic Spanish olive oil

Our Olive oil's secret is knowing how to combine family olive-picking tradition and history with the latest production methods, maintaining the strictest control over the process from flower to final bottled product with the strictest essential criteria.

In 1986 Manuel Heredia, marquis of Prado inherits the premises, property of the family since the 14th century, becoming the current owner and taking over Suerte Alta.

The farm is located in Albendín, in the Córdoba province in Spain. It consists of 255 hectares of watered olive groves, with olive trees between 10 and 90 years old, of local and traditional varieties - Picudo, Hojiblanco, Picual and Pajarero - planted intermingled in order to favor pollination and in order to control different production between crops.

In 1996 we started the conversion of the farm to organic under the supervision of the C.A.A.E. (Organic Agriculture Committee of Andalucía) in order to guarantee the absence of any residue in the oil and to maintain the soil's richness of life and nutrients.

In 2006 we built the new oil press in the center of the farm in order to close the production cycle within the premises and to manufacture an exclusive extra virgin olive oil which satisfies three characteristics: produced and bottled within

Our olive oils, found in the most important markets, fairs and competitions, have been awarded numerous quality prizes that endorse this genuine natural olive juice





the premises, organically produced and certified by Baena Designation of Origin (D.O.).

Our olive oils, found in the most important markets, fairs and competitions, have been awarded numerous quality prizes that endorse this genuine natural olive juice

The olive press designed by its owner, is a bioclimatic building with pergolas, vegetation screens and solar panels. Furthermore it is climate controlled with passive ventilation air chambers and a biomass furnace fuelled by olive pits which gives the building an energy balance of 0. The machine surfaces in contact with the olives are made of stainless steel and food-rubber.

The olives reach the mill, where the area of the estate they have come from is recorded, and are then transferred to 4 storage tanks and classified for milling. The milled olives are then transported to a horizontal malaxer from which the mass is sent to the decanter, a centrifugal extraction machine.

Thanks to this cold extraction the olive oil maintains all of its aromas, flavors and antioxidants. The oil is sent to a static decanting tank where water is eliminated by density difference, then it goes through a chain of mesh filters which blocks small suspended particles. It is finally stored in 14 tanks, each with a 28 T capacity, which are sealed and checked by Baena Designation of Origin (D.O.) staff.

The cellar is connected to the automatic linear packaging machinery with a capacity of eight hundred 500cc bottles/hour. Bottling takes place on request using bottles designed by Suerte Alta.



Founded in: 2006

Productive capacity: 250T/year of olive oil

Number of employees: 11

Export markets: Germany, Belgium, Canada, China, Denmark, Finland, France, Holland, Japan, Lithuania, Poland, Qatar, UAE, UK, USA, Vietnam

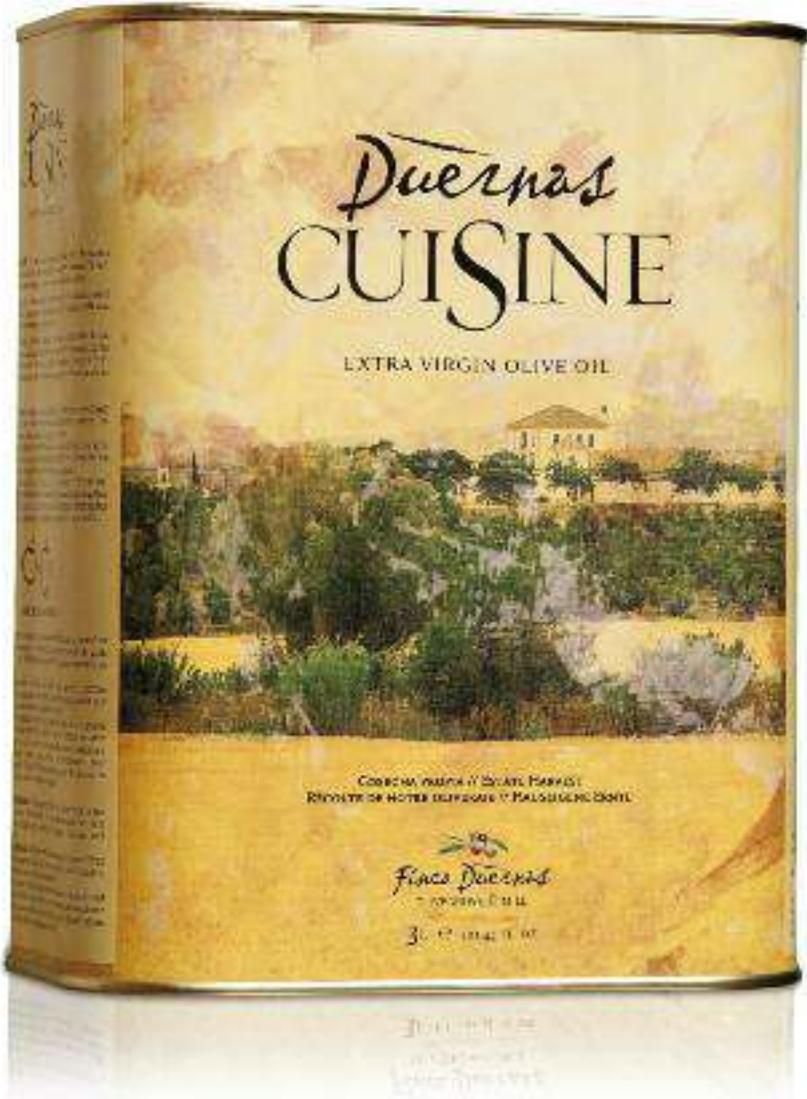
Products: Organic Extra Virgin Olive Oil

Brands: Cortijo de Suerte Alta Coupage Natural, Cortijo de Suerte Alta Picual en Envero

Certificates: Ecológico (CAAEE) CE, JAS, China - D.O.P Baena - SIQEV by QvExtra

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Cortijo de Suerte Alta is a member of the QvExtra! International Association. Our oils are bottled under the SIQEV seal of approval, with strict quality standards and our own self-regulation system – both at the point of origin and at the final point of sale – guaranteeing the high quality of our extra virgin olive oil for the consumer until the best-by date.



Finca Duernas

A 200 year old tradition

Finca Duernas - an olive grove with its own mill, which has been in the same family for 200 years - is located in Cordoba, in the Guadalquivir Valley where the best olive oil has been produced for more than 2,000 years. This area has the best climatic and topographic conditions for olive trees to produce excellent fruit.

Producer of genuine extra virgin olive oil and a defender of sustainable agriculture, Finca Duernas promotes an indigenous culture and traditional production methods. We are convinced that our commitment to sustainable agriculture is the only way that the farm will be in the best shape for our children. We begin harvesting a month and a half earlier than usual, in that fleeting moment of change when the olive grove is most beautiful and the fruit gives its very best juice.

The aromas and flavors of extra virgin olive oil are characteristic of the variety of olive it is made from. Two star varieties gather together at Duernas. The Arbequina is round like cherries, sweet and fruity with notes of banana; while the Picual variety is spicy and complex with an aftertaste of fresh almonds.

From a nutritional standpoint, this olive oil withstands heat the best, without undergoing any changes, thus allowing it to be used over and over again, which is not recommended for other olive oils.

We defend sustainable agriculture and promote a traditional and indigenous culture and production methods





Since the mill is located in the center of the olive grove, at Finca Duernas olives are crushed immediately to prevent the fruit from becoming oxidized and the entire production process of cold extraction is dutifully monitored. Our tracking system lets us know, by the batch number, the area of trees that every bottle of oil comes from, the exact day the olives were harvested and even who was involved in the process.

The walls and ceiling of the cellar at Finca Duernas have next generation insulation and an air conditioning system which prevents sudden changes in temperature that can reduce the quality of the oil. The cellar has an integrated production control system and IFS certification.

Despite our long history, at Finca Duernas we started bottling our olive oils in 2011 and we have already won several international awards: 2011 Bronze Medal at the Los Angeles Olive Oil Competition; 2012 Bronze Medal at Monde Selection in Bruxelles, 2013 1st Prize for Best Fruity Olive Oil in the entire province of Cordoba.

Duernas Oleum. Judging panel tasting notes point out its fruity aroma, especially of ripe banana, almonds and artichoke. A note of sweetness on the palate, with undertones of artichoke, tomato and a slight bitterness and bite.

Duernas Legio X. This olive oil, made from Arbequina olives, is fruity with an aroma of apples, smooth taste and intense green color. The label refers to Caesar's tenth legion, which is supposed to have camped on the grounds of Finca Duernas.

Duernas Cuisine. The result of a balanced blend of the Arbequina and Picual varieties, it is meant to be used in frying and cooking.



Founded in: 1941

Productive capacity: 600 T

Number of employees: 50/100

Export markets: Japan, United Kingdom, Holland, France

Products: Organic and non-organic extra virgin olive oil

Brands: Duernas Oleum, Duernas Legiox, Duernas Cuisine

Certificates: IFS (audited in March, 2014)

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Goya

If it's Goya it has to be good

The premier source for authentic Latino cuisine, Goya Foods is today the largest Hispanic-owned food company in the United States. Goya's history is as much about the importance of family as it is about achieving the American dream.

Founded in 1936 by D. Prudencio Unanue and his wife Carolina, both from Spain, Goya was started in a small storefront in Lower Manhattan, New York, catering to local Hispanic families by distributing Spanish foods such as olives, olive oil and sardines. Driven by the belief that there was a growing consumer market for high-quality, fresh-tasting, Latino foods, the Unanue's infused their personal philosophy throughout the company: "If it's Goya it has to be good".

Nowadays Goya has a staff of more than 4,000 people. From our 18 production units and logistic platforms we manufacture, pack and distribute over 2,200 high-quality food products from the Caribbean, Mexico, Central and South America and, of course, from Spain. In 2013, Goya Spain is one of the most successful Spanish companies in exports of both packed olive oil and olives under the same brand, "GOYA".

Our olive oils, which have been named by consumer associations as "best buy", have recently won several gold medals in international contests





Goya Spain was created in 1974 by Antonio Unanue to ensure the best olive and olive oil production and packaging in the world.

As a result of this strategic decision, we have gained a 6% share of the U.S. market in olive oil bottled in Spain and a 15% share of olives packaged in Spain.

Goya Spain began exporting from the start and continues with even more force in this line of business. After becoming the undisputed leader in Latino products in the USA, Goya is preparing its next logical move: international expansion. Goya Spain is ready for this new challenge given its tradition, experience in exporting, high degree of automation and strict food safety policy (BRC "A", IFS V6 Higher Level).

To achieve this, we are equally aware of the quality of our olive oils, which have been named by consumer associations as "best buy", and have recently won several gold medals in international contests; and of our award-winning olives that in 2013 took the "Chefs' Best" award for "Best Taste" for the 7th year in a row in the U.S.

We are the only company with a balanced production of both Spanish olives and Spanish olive oil (each one of about 3 million Kg/year), That offer these two products under the same brand umbrella.

Everyone wins with Goya: we offer quality at a fair price and we look after the interests of our distributors and care for our customers. Because, as our President Robert Unanue says: "I am not the President of Goya, our customer is".

Founded in: 1974

Productive capacity: 20 million bottles of olive oil in 2013

Number of employees: 29

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

Products: Olive oil, capers, peppers and Manzanilla and Gordal olives (*see Olives and Pickled Vegetables section in this book*)

Brands: Goya

Certificates: BRC grade A, IFS V6 Higher Level, ISO 9001-2008, HACCP, Kosher

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Morainsa

Extra virgin olive oil, health, quality and the environment

Mora Industrial, S.A. (Morainsa) is a family-owned company with three generations of knowledge and experience focused on producing quality products.

Since its founding, 40 years ago, Morainsa's strategy has been to direct all of its resources and efforts on strictly monitoring the entire production process. The result is a high level product. This is evident in all of the oils we produce individually, in order to enhance the distinctive characteristics dictated by the variety.

Our own production allows us to monitor all stages of product quality, demonstrating the importance of agriculture and the field, which supply us with the raw material. That is why we take care of and respect it, and are concerned about the future of our olive groves.

Our products mirror our respect for the environment, eagerness to improve, personal satisfaction and passion for quality.

We at Morainsa are aware that health comes first and that it is the key to well-being. Therefore, by presenting our oils as the basis of typical local and Spanish cuisine, we help maintain an aspect of our culture: the Mediterranean diet.

At Morainsa we believe that R&D is essential to achieving quality products, therefore we have the latest generation facilities and machinery





At Morainsa we believe that RDI is essential to achieving quality products, therefore we have the latest generation facilities and machinery. The current owners, accompanied by a young team, participate in European research programs, making Morainsa a leading company in innovative technology that also works under the standards of recognized quality certifications. We make our dedication to the world of olive oil known to our customers and we strive to ensure that they are aware and enjoy.

We have several production lines to streamline working simultaneously on several products, thus allowing us to manage time, meet the needs of the customers and offer individual attention.

Our products can be grouped under four categories:

Gourmet olive oil. Extra virgin olive oil packaged in small glass containers under the D.O. Montes de Toledo and organic olive oils with NOP, JAS and 834 certificates.

Extra virgin olive oil. Packaged under the Morainsa brand in PET plastic and glass containers. Aimed at a more demanding consumer. Good quality-price ratio.

Virgin olive oil. Morainsa brand, packaged in PET plastic containers. Aimed at health-conscious consumers looking for a reasonably-priced natural product.

Refined oil. Aimed at the hotel, restaurant and catering industries. Mild and intensely flavored oils and pomace oil. The latter is best suited for commercial kitchens for its ability to withstand high temperatures and affordable price. It also appeals to consumers that want a milder flavor.

Morain Industrial Sa

Founded in: 1974

Productive capacity: 2,000 T

Number of employees: 25

Export markets: China, Japan, Poland, Italy, Cameroon, Nicaragua

Products: Extra virgin olive oil, virgin olive oil, olive oil, pomace oil

Brands: Morainsa, Ornal D.O Montes de Toledo, Ornal Ecológico and Meditolive

Certificates: ISO 9001:2008, Organic 834, JAS NOP, Denomination of Origin Montes de Toledo

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Mueloliva y Minerva, S.L.

Our family has made a way of life out of olive oil



Mateo Muela started the family business of buying and selling olive oil in 1942. Shortly after, he began making his own virgin olive oil at a mill using the traditional cold press method. His plan – contrary to and ahead of its time – was a bold commitment to extra virgin olive oil, an uncommon trend then, that would later become the core of the olive oil industry.

In 1958, Mateo added a 2nd mill to extract oil using an innovative grinding system he himself developed. Thus, he began making a unique olive oil which, in time, has become a national and international standard. Venta del Barón has been recognized as the world's best olive oil, winning the IOOC (International Olive Oil Council) first place as the World's Best Olive Oil; Spain's Ministry of Agriculture's prize for best bitter, fruity, green extra virgin olive oil, and 94 points in the FlosOlei guide.

One of our core values is a commitment to innovation and new technology throughout the entire production process to achieve unequalled quality.

Our unique and exclusive system enables olive oil extraction without heat or water, thereby retaining all of the fruit's characteristics. Add to this our great concern to avoid oxidation. Hence, Mueloliva oils are rich in tocopherols, phytosterols and polyphenols, important components of a healthy diet.

Our brand's integrity reflects our five values: safety, simplicity, fair pricing, service and sustainability





Our process for extracting and packaging eliminates any risk that can alter the original condition of the oils in shipping.

The Spanish Association of Olive Tree Municipalities has defined our new facility as *“a modern and highly functional building that is scrupulous in its handling of olives, classifying different varieties of olives and organizing olive oils in the cellar by applying the most important advances in bottling, packaging and storage”*.

We strive to create a strong and unique brand. The brand's integrity reflects our five values: safety, simplicity, fair pricing, service and sustainability.

Venta del Barón. The artisan's extra virgin olive. The very best. Made from a selection of early harvest, handpicked olives. Its artisanal production meets follows the strict standards of the Protected Denomination of Origin Priego de Cordoba. It is ideal as an appetizer or for breakfast.

Mueloliva Picuda. Excellence in cooking. Unique. We make this cold-pressed extra virgin olive oil from the best Picuda olives from the Cordovan Subbetica. We recommend raw, uncooked, usage.

Mueloliva Clásica. A daily pleasure. Extra virgin olive oil made from a selection of the best Picual and Hojiblanca olives. Perfect for any use in your cooking.

MUEL OLIVA

Founded in: 1942

Productive capacity: 20 million liters

Number of employees: 50

Export markets: China, Japan, India, USA, Canada, Central America, South America, EU, Persian Gulf

Products: Extra virgin olive oil, olive oil, pomace oil, sunflower oil, grapeseed oil

Brands: Venta del Barón, Mueloliva Picuda, Mueloliva, Alianza, Minerva, private brands

Certificates: BRC, IFS, Halal, Kosher

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Oleoestepa

The appreciated extra virgin olive oil of a great family

We are a large cooperative society located in Andalusia, made up of 4,300 olive-growing families, that generates thousands of direct and indirect jobs. Because we love and care for our environment, our ecofriendly, integrated production techniques are used in all our 50,000 hectares olive groves. In our oil mills we work exclusively with olives from our own groves.

Our farmers' commitment, strict quality controls and international certifications ensure our quality guarantee, the traceability and food safety of all our oil. In our ongoing pursuit of excellence we only pack extra virgin olive oil. This commitment over the last three decades has been rewarded year after year at national and international contests that ranked Oleoestepa extra virgin olive oil amongst the best in the world.

This high quality is backed by the Denomination of Origin Estepa. The Regulatory Board of the DOP Estepa is the strictest in Spain. We set our extra virgin olive oil apart from the rest through our sensorial panel and chemical analysis, in order to ensure this high quality until the best before date.

National and international contests have ranked Oleoestepa extra virgin olive oil among the best in the world





At Oleoestepa we have set up an integrated production system to obtain the highest quality extra virgin olive oil. We have one of the largest mechanical harvesting fleets in the world, which enables us the rapid collection of our olives without altering quality. Oleoestepa mills have currently the most advanced extraction technology and automated production control systems for processing the fruit.

We conduct ongoing inspections at our olive laboratory (recognized by the IOOC as an official laboratory) to decide the precise moment for harvesting. We also apply NIR (near infrared) technology to assure that the extraction is performed correctly. After harvesting, we do quality assurance testing and categorize all of our extra virgin olive oil using the most advanced instruments for the chemical analysis of our oils.

We consider sensorial analysis to be a differential factor in the pursuit of excellence and in obtaining a unique and exclusive extra virgin olive oil. We have a tasting panel - recognized by the IOOC - that gives our oils an organoleptic grading based on sensorial notes to distinguish the quality of our oils from the rest.

Our filtering plant has the capacity to process 12,000 tons of extra virgin olive oil a year, and it has been awarded the most important certifications for quality assurance.

Oleoestepa has made a firm commitment to R&D in order to offer the consumer maximum value and to efficiently meet technological challenges.



Founded in: 1986

Productive capacity: Around 25 Mill. Kg

Number of employees: 127

Export markets: USA, Canada, Mexico, Brazil, China, Japan, EU, Russia, Israel, etc.

Products: Premium - Estepa Virgen; Organic - Egregio; Varietals - Oleoestepa Hojiblanca, Oleoestepa Arberquino, Oleoestepa Selección

Brands: Oleoestepa, Estepa Virgen, Egregio

Certificates: IFS:v6, BRC:v6, ISO 14001:2004, ISO 17025:2005, Integrated Production, DOP ESTEPA, Kosher, International Food Standard, British Retail Consortium, Regional Government of Andalusia Certificate of Quality, and Organic Olive Oil Certificates

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Olivar de Segura

Much more than olive oil

In 1748, when King Fernando VI of Spain ordered that all the mountains of the country were to come under the jurisdiction of the navy, the region of Comun de Segura became the maritime province of Segura de la Sierra, Andalusia. Hence, its forest resources provided the wood needed to build the Tobacco Factory of Seville as well as major buildings and part of the king's fleet.

Our olive grove is located in the Sierras de Cazorla, Segura y Las Villas Natural Park, the largest natural protected area in Spain with 214,336 hectares. In 1983 UNESCO declared these mountains a Biosphere Reserve through the Man and Biosphere Program (MAB). And in 1988 the EU declared the natural park a Special Zone for the Protection of Birds (ZEPA) as part of the Natura 2000 network.

Olivar de Segura is an Andalusia cooperative located in the north eastern part of the province of Jaen. We produce, market and package extra virgin olive oil with the Sierra de Segura Denomination of Origin, and organic extra virgin olive oil protected by CAAE (Andalusia Committee for Organic Farming).

4,500 farmers from 14 cooperatives gather together in a single 30,000 m² olive grove 900 meters up in the mountains, to make the best olive oil.

Since our establishment we have stuck to one basic goal: to offer our customers competitively priced top quality extra virgin olive oil, without the need for a middle man





Our extra virgin olive oil is greenish yellow in color, with an aroma reminiscent of fresh fruit with notes of apple, figs and freshly cut grass. The taste is fresh and balanced, bitter and spicy.

Since its construction in 1989, Olivar de Segura has stuck to one basic goal: to offer its customers competitively priced top quality extra virgin olive oil, without the need for a middle man. Premium quality over quantity is a mark of respect for the environment and for a firm committed to the sustainable development of our region and surroundings. Thus we were able to boost the image, prestige and richness of our oils.

The extra virgin olive oil we produce (20 Mill. Kg) comes mainly from the Picual variety of olives, prevalent in this geographical area (approximately 97 % of the olive grove). This variety offers a very unique olive oil characterized by its stability: longer life, high resistance to rancidity and that performs well in high heat cooking due to its high content of natural antioxidants, vitamin E and polyphenols.

We introduced the ecological cultivation of olive trees to Sierra de Segura - of which we are pioneers and leaders in Spain - thanks to an EU pilot research program developed between 1986 and 1989 in France, Italy, Greece, the UK and Spain. The ECLAIR 2000 Project advanced research for manufacturing and developing products designed to deal with the olive grove in organic cultivation. Currently our organic extra virgin olive oil comes mainly from the Picual variety mixed with Arbequina and Cornicabra.

Founded in: 1989

Productive capacity: 20,000 T of virgin olive oil

Number of employees: 15

Export markets: Japan, China, USA, Canada, Brazil, Germany, Sweden, Equatorial Guinea, UK, etc.

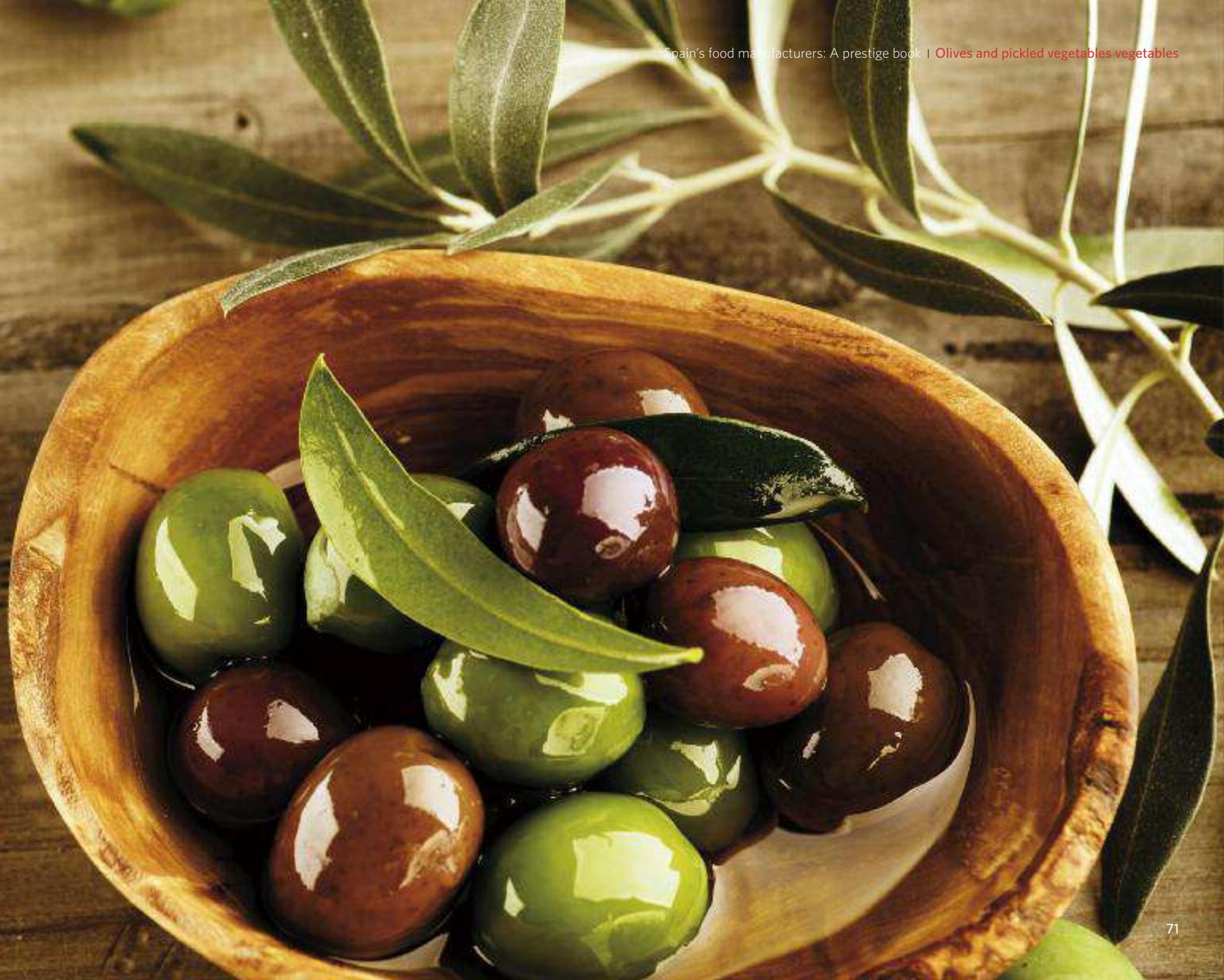
Products: Organic extra virgin olive oil with the Sierra de Segura Denomination of Origin

Brands: Olivar de Segura, Señorío de Segura, Oro de Genave, Verde Segura

Certificates: ISO, BRC, IFS, CAAE, Andalucía Quality Certificate, Sierra de Segura Denomination of Origin

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Olives and pickled vegetables



Olives and pickled vegetables

Olives are intimately linked to Mediterranean cuisine. Thousands of years ago Greek mythology told of how, with her spear, the goddess Palas Atenea gave birth to the olive tree, an extraordinary tree whose fruit would give nourishment to men and from whose fruit a juice would be extracted that would bring them energy, would cure their wounds and would shed light in the darkness. And although it is true that olives were initially used to extract oil, there are references from the 1st century B.C. quoting their direct consumption. Such is the case of Columella's famous writings that describe different methods of preparing table olives. In fact it even became a basic component of the daily diet of field laborers in Andalusia and Extremadura during the nineteenth and twentieth centuries.

As well as being the first world exporter of olives, Spain also has the widest offer of varieties: Manzanilla, Hojiblanca, Gordal, Carrasqueña, Cacerena, Aloreña, Lechín, Morona, Verdial, Picual... among many others.

Being a delicate fruit, harvesting requires special care in order not to damage it, reason for which the most sensitive varieties are still collected by hand. Harvesting, popularly known as *"el verdeo"*, primarily takes place in the months of September and October.

Depending on the moment of collection and the following preparation process, there are three types of olives: green,

black and of variable color (purple, chestnut or pink). After processing to make them edible (olives are the only fruit which cannot be eaten straight from the tree), it can be found in countless presentations: whole, pitted, sliced, halved, quartered or in segments. They can be dressed in brine, Spanish style, with garlic and herbs, with thyme or oregano, with citrus fruits like lemon or orange or with onion, etc. And if we consider the stuffings, there are over 80 different kinds, the most popular of which are anchovy, pepper, tuna, salmon, almond, lemon, onion, garlic, ham, etc.

The real development of the table olive sector began at the end of the 19th century in the province of Seville. Since then Spain has been international market leader in terms of production volume, transformation, sales and export. As well as the 8,000 direct jobs the sector generates, one must take

In Spain there are over 80 types of olive stuffing. The most popular are anchovies, peppers, almonds, garlic, tuna etc.

into account the over 6 million days of field labor needed for the harvest and farming of olives. The sector's contribution to Spain's gross domestic product is in the range of 1,000 million Euros.

Of the 2,584,564 hectares of olive groves in Spain, 144,904 hectares are reserved for table olives, that is to say, 5.61%. The greatest expanses of this crop can be found in Andalusia (83.67%) and Extremadura (14.13%), although to a lesser extent they can also be found in Aragón, Catalonia, Murcia and other regions. With an average production of 515,000 tons over the past few years, Spain remains the first table olive producer in the world (22% of the global total) followed far behind by Egypt, Turkey and Syria.

Over 60% of our production is destined for export, which also makes Spain, with a considerable difference, the first exporter of table olives worldwide, followed by Greece and Egypt. In 2012 exports amounted to a value of 630.6 million Euros to over 120 countries. Their main destination is the USA, which accounts for 24% of exports. Internal consumption is also considerable, with Spain occupying the fourth place in the world ranking.

Olives are the most popular of our pickles but not the only one. The next most popular are gherkins, pickled onions, aubergines, garlic, chiles, carrots and capers. In Spain they

Spain is the number one producer, processor, seller and exporter of table olives and the 4th consumer on the planet

are eaten at all times, especially as tapas or as snacks in bars, with an ice-cold beer or a glass of vermouth. Their consumption at home is not to be underestimated. A very popular way of eating them is as *"banderillas"*, which get their name from one of the instruments used by bullfighters during *corridos*. They consist of various pickles – a combination of olives, gherkins, onions, peppers, chiles and anchovies – on a skewer.

Pickles are vegetables preserved in wine vinegar, although occasionally to enhance their flavor, garlic, onion or spices may be added. Furthermore, they don't lose any of their nutritional properties in the process, maintaining all of their vitamins and minerals.



Aceitunas Torrent

Passion for olives



Aceitunas Torrent is a leading company in seasoning, packaging and retail of table olives, as well as being one of the world's main exporters. It was founded at the end of the 19th century, when Francisco Torrent Terol left his home town Alicante and moved to Cordoba. It was in 1898, when he started to make barrels to keep the oil and table olives in and by doing so he laid the foundations of the company

In 1920 Aceitunas Torrent became one of the first Spanish companies to export olives, specifically to South American countries like Brazil, underlining the company's predilection for export from the very beginning.

In over a century since its creation, Aceitunas Torrent has experienced exponential growth in production, innovation, management, brand image and retail; positioning it as market leader, with representation in all five continents.

Currently the fourth generation of the Torrent family heads the company, which is strategically located in Aguilar de la Frontera (Cordoba), a table olive producing area par excellence, whose important geographic location has turned it into a communications hub for exports.

Aceitunas Torrent is a leading company in seasoning, packaging and retail of table olives, and one of the world's main exporters of this product





Aceitunas Torrent is located in a 100,000 m² industrial complex where the company's entire production and marketing processes are located. It has state-of-the-art technology for pitting, stuffing and slicing table olives. With over 90 production employees, and due to the optimization of its resources, the company has a production capacity of over 20 million kg/year.

Aceitunas Torrent is renowned for its black olives, a point of reference for all of the company's other products. Yet its product range includes green and black olives: whole, pitted, stuffed or sliced, packaged both in cans and glass jars.

Production focuses primarily on the Cordoba Hojiblanca variety, undisputed leader in terms of number of kilos produced and exported for domestic consumption, although the company also produces other varieties such as Manzanilla and Gordal olives.

Quality has always been the company's key principles. Aceitunas Torrent was the first firm in the Spanish olive sector to obtain the ISO 9001:2008 certification in all processing stages: seasoning, packaging and marketing. Because of its commitment to the environment and food safety it then obtained the ISO 14001:2004 certificate, upper level IFS and A grade BRC A certificates, as well as Eurostars for its fleet of vehicles.

Emphasis on innovation has led Aceitunas Torrent to launch new products such as its line of innovative gourmet stuffings and caramelized olives or its premium extra virgin olive oil.



Founded in: 1898

Productive capacity: 20,000 T/year

Number of employees: 90

Export markets: Germany, S. Arabia, Algeria, Austria, Azerbaijan, Belgium, Belarus, Bulgaria, Canada, Chile, Croatia, Denmark, UAE, USA, Finland, France, Holland, Hong Kong, Hungary, India, Ireland, Fiji, Israel, Italy, Jordan, Kuwait, Libya, Malta, Mexico, Moldavia, Norway, Oman, Pakistan, Panama, Portugal, Czech Republic, Romania, Russia, Seychelles, Switzerland, Thailand, Taiwan, Ukraine, Uzbekistan, Venezuela, Yemen

Products: Whole, pitted, sliced and stuffed green olives. Whole, pitted and sliced black olives

Brands: Torrent, Olivalife, Bostoliva, Privilegio de Al-Andalus, Samaoliva

Certificates: BRC, ISO 9001, ISO 14001, IFS, Kosher, Ecocostars

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Agro Sevilla

The No. 1 olive producer in the World

Agro Sevilla is cooperative comprised of olive-growing cooperatives from the Sierra Sur region in Sevilla and surroundings. We process, pack and market our member's olives, ensuring the future of the olive groves for next generations.

From its start in 1977, Agro Sevilla has focused its efforts on exporting. Over the years, we have become the first exporter of table olives in Spain and the world, selling our products to more than 70 countries and leading in most of them.

Our group's entire activity is focused on customer service. Agro Sevilla produces olives on two continents, Europe and South America, and in both hemispheres. Hence, we have two harvests a year, which allows us to offer our clients guaranteed supply without interruption, geographic proximity and a broader range of olives. We also have subsidiaries in the United States and Italy that are responsible for marketing and distributing our products in both countries.

Agro Sevilla produces olives in Europe and South America, and in both hemispheres. Hence, we have two harvests a year, which allows us to offer our clients guaranteed supply without interruption





In 2012, Agro Sevilla's aggregated turnover amounted to 149 million Euros and it exported its products to more than 70 countries.

The Group has several subsidiaries, including production centers (Agro Sevilla Aceitunas, Aceites Agro Sevilla and Agro Sevilla Chile) and sales and management offices (A.S. Comercio y Servicios, Agro Sevilla USA and Agro Sevilla Italia).

Our Group has a vertical organizational structure and comprises 10 agricultural cooperatives with around 3,500 farmers and an annual production of 85,000 tons approximately. Since we produce, pack and market our own harvest, we are in a position to exercise full control over the product, from point of origin to point of sale.

Our packing plants are equipped with the most advanced technology. We are a pioneering Spanish company in our industry in environmental matters having implemented the HACCP control system and ISO 14001 quality certificate.

Our competitive advantages are traceability - from farming to marketing -, integrated strategy, through joint working teams that ensure standard olive quality, and quality control laboratories throughout the whole production process.

The logo for AGRO SEVILLA, featuring the words "AGRO" and "SEVILLA" in white capital letters on a green, teardrop-shaped background.

Founded in: 1977

Productive capacity: 85.000 T

Number of employees: 350 employees and 3.500 associated farmers

Export markets: More than 75 countries including, USA, Germany, Australia, Brazil, China, Israel, Italy, Japan, Kuwait, Latvia, Malaysia, Mexico, Norway, India, Pakistan, Poland, Portugal, Qatar, United Kingdom, Czech Republic, Russia, Switzerland, Ukraine, Venezuela.

Products: Green table olives (whole, pitted, sliced, stuffed) and black olives (whole, pitted, sliced) olive oil and extra virgin olive oil

Brands: Coopoliva, Agro Sevilla, Seville Premium, Olicoop

Certificates: ISO 14.001, BRC, IFS, OHSAS 18001

Contact: Alfredo Martín Soldevilla.

Commercial Director
grupo@agrosevilla.com

Agro Sevilla Aceitunas Soc. Coop. And.

Avda. de la Innovación s/n

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Ángel Camacho Alimentación

We do it for you

Ángel Camacho Alimentación is a Spanish family business with a history spanning over a hundred years (since 1897), which produces and markets an extensive range of fine foods from the Mediterranean basin and other parts of the world.

Our product categories, which include olives, olive oils, jams, pickles, condiments and teas, are marketed under the Company's flagship brands Fragata, La Vieja Fabrica, Susarón, Bulerías, Loreto, Mario and Stovit as well as packed under private labels.

With sales to over 95 countries and an annual production of around 60 Mill. Kg. of table olives, our business group with corporate offices in Moron (Seville) and subsidiaries in Spain, the USA, the UK, Poland and Argentina, is one of the leading global table olive industry players.

Ángel Camacho offers complete programs for retail and foodservice as well as for the food industry.

Through its policy of corporate social responsibility (CSR), Ángel Camacho contributes actively and voluntarily to social improvement, generating prosperity in the community.

In 2013, Ángel Camacho joined the United Nations Global Compact to contribute actively and voluntarily to the

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





implementation of the 10 universally accepted Principles in the areas of human rights, labour, the environment and fight against corruption.

With hypermodern processing & warehouse facilities, located in Spain, Poland and Argentina, and high-speed production lines, olives and other specialty foods are packed in virtually any configuration the customer requires, i.e. from the smallest retail jar for consumer use to big size packing for foodservice, catering or the food industry.

Our different 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.

The ISO, BRC, IFS and other certifications certify that the quality assurance systems implemented in the company comply with the conditions specified in the aforementioned international standards.

At Angel Camacho we place emphasis on waste reduction and recycling of resources as opposed to waste disposal, and as such we operate the only processing plants in the table olive industry with zero waste. Our plantations (olive groves) absorb the CO₂ generated by the combustion of biomass (olive stones or pits) used in our facilities, resulting in zero net emissions of CO₂.

In 2005 Angel Camacho obtained the ISO 14001-2004 (BVQi) certification, thus becoming the world's first table olive industry player whose environmental quality management system has been completely certified.



Founded in: 1897

Productive capacity: 60,000 T of olives

Number of employees: 866

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, condiments, jams, sweeteners, herbal teas and infusions

Brands: Fragata, La Vieja Fábrica, Bulerías, Loreto, Susarón

Certificates: IFS, BRC, ISO

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Euroлива

The trusted partner of some of the world's top names in retail and restaurant distribution

Euroлива is one of Spain's most experienced olive producers and exporters, based in the heart of the world's largest olive-producing area, near Seville, in Andalusia.

Our family firm has been in the olive business since the early 20th century. Olives truly are our way of life. Our founders' enthusiasm for this delicious fruit and our continued insistence on quality, have made the Crespo family name one of the most recognised olive brands on international markets.

It is hard not to feel passionate about our business! Olives have been an essential ingredient of the Mediterranean diet for thousands of years.

Green, black, sliced, stuffed... we offer a complete range of tasty olive products in colourful tins, jars and pouches, guaranteed to brighten up any olive fixture.

We are the trusted partner of some of the world's top names in retail and restaurant distribution, exporting to over 40 countries worldwide and still growing.

Crespo olives are delicious, nutritious, versatile and convenient: the perfect food for today's lifestyle.

Our continued insistence on quality has made the Crespo family name one of the most recognised olive brands on international markets





The Euroliva plant was founded in 1968 by the Crespo brothers and currently has a productive capacity of 28,000 tons of olives per year.

The team at Euroliva directly oversees every stage of the olive making process: from receiving raw olives from the fields through to curing, fermentation, processing, packaging and thermal treatment.

For more than a decade Euroliva has been engaged in an ongoing investment program to automate processes, thereby increasing our productive capacity and competitiveness, and ensuring product safety.

The best technology and machinery, together with a philosophy of constant quality, allows us to comply with the food industry's most demanding quality certifications. In 2003, Euroliva was the first in the industry to receive the prestigious BRC certificate. We also have IFS and ISO 9001:2008 certifications.

We are proud to say that our extensive traceability system offers customers every guarantee from receipt of the raw material, through to its packaging and delivery. We have our own laboratories that are managed by a team of highly qualified professionals and a multi-disciplinary panel performing tastings and product benchmarking daily for quality assessment.



Founded in: 1968

Productive capacity: 28.000 T

Number of employees: 130

Export markets: France, UK, Switzerland, USA, Russia, Italy, Germany, Canada, New Zealand, Japan, Taiwan, Thailand, GCC countries, etc.

Products: Green and black table olives

Brands : Crespo and Beldi

Certificates: BRC Grade A, IFS Higher Level, ISO9001:2008, Marine Stewardship Council

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Goya

If it's Goya it has to be good

The premier source for authentic Latino cuisine, Goya Foods is today the largest Hispanic-owned food company in the United States. Goya's history is as much about the importance of family as it is about achieving the American dream.

Founded in 1936 by D. Prudencio Unanue and his wife Carolina, both from Spain, Goya was started in a small storefront in Lower Manhattan, New York, catering to local Hispanic families by distributing Spanish foods such as olives, olive oil and sardines. Driven by the belief that there was a growing consumer market for high-quality, fresh-tasting, Latino foods, the Unanue's infused their personal philosophy throughout the company: "If it's Goya it has to be good".

Nowadays Goya has a staff of more than 4.000 people. From our 18 production units and logistic platforms we manufacture, pack and distribute over 2,200 high-quality food products from the Caribbean, Mexico, Central and South America and, of course, from Spain. In 2013, Goya Spain is one of the most successful Spanish companies in exports of both packed olive oil and olives under the same brand, "GOYA".

Goya was started in a small storefront in lower Manhattan, New York,... distributing spanish foods such as olives, olive oil and sardines





Goya Spain was created in 1974 by Antonio Unanue to ensure the best olive and olive oil production and packaging in the world.

As a result of this strategic decision, we have gained a 6% share of the U.S. market in olive oil bottled in Spain and a 15% share of olives packaged in Spain.

Goya Spain began exporting from the start and continues with even more force in this line of business. After becoming the undisputed leader in Latino products in the USA, Goya is preparing its next logical move: international expansion. Goya Spain is ready for this new challenge given its tradition, experience in exporting, high degree of automation and strict food safety policy (BRC "A", IFS V6 Higher Level).

To achieve this, we are equally aware of the quality of our olive oils, which have been named by consumer associations as "best buy", and have recently won several gold medals in international contests; and of our award-winning olives that in 2013 took the "Chefs' Best" award for "Best Taste" for the 7th year in a row in the U.S.

We are the only company with a balanced production of both Spanish olives and Spanish olive oil (each one of about 3 million Kg/year), That offer these two products under the same brand umbrella.

Everyone wins with Goya: we offer quality at a fair price and we look after the interests of our distributors and care for our customers. Because, as our President Robert Unanue says: "I am not the President of Goya, our customer is".

GOYA[®]

Founded in: 1974

Productive capacity: 20 million jars of olives in 2013

Number of employees: 29

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

Products: Manzanilla and Gordal olives, capers, peppers and olive oil (see *Olive Oil* section in this book)

Brands: Goya

Certificates: BRC grade A, IFS V6 Higher Level, ISO 9001-2008, HACCP, Kosher

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Jolca

Synonymous with the best quality Spanish olive

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

The company is located in Aljarafe, Seville a region that since ancient times is famous for the quality of its olives. 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 through today 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 of the acclaim received in the markets where they are sold. For our customers, quality is the hallmark of our brand.

Today, JOLCA is a leading brand in the Spanish market and our products can be found worldwide. JOLCA is synonymous with the best quality Spanish olive. As an appetizer or in cooking, table olives are highly nutritious and they are part of the Mediterranean diet.

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





It has always been the priority of our company - which has the industrial facilities to treat such distinguished and unique fruit with care - to be 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.

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 ability of a team of professional experts, modern and efficient production facilities, scrupulous monitoring of the complete production process: from tree to package and of course the selection of olives to satisfy the most discerning palates is what provides JOLCA its 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, flexible bags) and variety of presentations (pitted, whole, stuffed with different ingredients, seasoned with spices, etc.) enable us to meet the demands of different consumer groups.



Founded in: 1961

Productive capacity: 8,000 T

Number of employees: 80

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 and Joquita

Certificates: ISO 9000, IFS

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Meat products



Meat products

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 almost 700 slaughterhouses, 2,400 cutting plants, and over 5,000 processing establishments. In 2012, Spanish pork production exceeded 3.5 Mill. T, making Spain the 2nd pork meat producer in the EU (after Germany), and the 4th worldwide.

Pork meat is known for being very tasty, being used both for consumption and for industrial processing. Spanish pork products are divided in two main categories depending on the race they come from. The majority is white pork, from which delicious 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 44 million cured hams are produced annually, of which about 6 million are Ibérico, 16 million are

Serrano and 22 million are cured white pork. Only those which comply with *Especialidad Tradicional Garantizada* (ETG, Guaranteed Traditional Speciality) regulations can be called Serrano. Iberian ham production is protected by 4 Designations of Origin (D.O.): Cerdo Ibérico, Guijuelo de Huelva, Los Pedroches and Dehesa de Extremadura.

In recent years acorn-fed Ibérico ham has positioned itself alongside the most sophisticated delicatessen products in the world. This ham is made from Ibérico free-range pigs reared in the great holm oak pastures to the west and south west of the Peninsula. Their nourishment, based on acorns, gives their meat a very distinguished and valued taste. This race's distinguishing quality is the infiltration of intramuscular fat, which gives its meat an unbeatable texture and juiciness.

Spain also has a great tradition in the manufacture of 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 flour and spices such as paprika and pepper. A great number of these products have successfully been present in foreign markets for years.

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. Spanish livestock is the 2nd in the EU in terms of numbers, and the meat industry is the 4th most important sector in Spain after cars, petrol and energy. Its

weight in the economy is considerable: with a business of euros 21,164 Mill., it accounts for 20% of the food industry and brings 2% of GDP.

Furthermore the meat industry is the number 1 exporter of Spain's food and agriculture industry, even ahead of wine exports. In 2012, overseas sales reached 1.46 Mill. T of fresh meat and 123,000 T of meat products for a total value of euros 4,157 Mill. And international demand is on the increase.

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 health and sanitary controls, and many even have private certificates which guarantee the traceability of the product and its correct treatment during the process.

Spain is the 5th bovine meat producer in the EU, a sector with a great bias on export (20% of production), especially to the EU. Cattle are reared primarily in the north of Spain, due to the abundance of meadows, and in the west and south-west of the Iberian Peninsula, regions with great estates and pastures. Currently some indigenous Spanish races are experiencing a strong comeback and receiving awards for their quality and characteristics.

The farming of wool-giving livestock primarily takes place in the driest regions of Spain because they are not very demanding in terms of pastures and are very resilient to

Spain is the 2nd largest pork meat producer and the 5th bovine meat producer in the European Union

extreme climates. Consumption of suckling lamb, for example, is very popular in Castile, where it is cooked in wood ovens. Rabbit is also very popular, and its use in Spanish cuisine dates back to time immemorial. Suffice it to say that the word Spain comes from the Phoenician term *i-spn-ya*, meaning "land of rabbits".

17 Designations of Origin (D.O.) across the entire national territory safeguard the quality of some of the finest Spanish meats, like Ternera Gallega (Galician veal). D.O.s aim to protect the qualities that differentiate the meat of cattle reared in specific areas, whether because they are indigenous races, because of the environment they graze in or because of the nourishment they ingest. The resulting meat is of excellent quality as well as being extraordinarily tasty and juicy.



Cinco Jotas

Spain's National Treasure

Cinco Jotas is a legendary brand that has devoted more than 130 years to safeguarding the authenticity of products made from 100% Ibérico pigs. The unparalleled taste and quality of our ham is the result of factors that have to do mainly with persistence in our traditional methodology. Our product is unique, first-rate, gourmet, exclusive, distinctive and impossible to reproduce if its factors were to be changed.

Our indigenous pigs are raised in a natural and free range habitat in the Spanish *dehesa*, ancient oak meadows, and a one of a kind ecosystem unique to the Iberian Peninsula. Thanks to extensive daily exercise (14 km walks) and diet (consisting of acorns and other natural ingredients) we are able to produce the highest quality meat products.

Our hundred-year-old cellars are in Jabugo, an exceptional enclave ideal for curing meat, located in the heart of the Sierra Aracena-Picos de Aroche Natural Park (declared a Biosphere Reserve by UNESCO).

Cinco Jotas is part of an ancient tradition of breeding, processing and carving by hand. Our artisans bring knowledge and wisdom passed down from generation to generation, a custom that is still maintained today.

Over 130 years devoted to preserving the authenticity of products obtained from Acorn Fed 100% Ibérico pigs





Faithful to its origins, Cinco Jotas has preserved the purebred 100% Ibérico pig and the natural ecosystem where it is raised. Backed by more than 15 years of research into livestock production, Cinco Jotas has a team of veterinarians and agricultural technicians that are wholly and exclusively devoted to animal studies, care and control and the 100% Ibérico pig and its habitat, the centuries-old meadows of southwestern part of the Iberian peninsula. Our pigs - 100% Ibérico mothers and fathers - are controlled and recorded in the AECERIBER official genealogical book.

Our founders were pioneers in developing products made from Acorn Fed 100% Ibérico pigs. At Cinco Jotas, we only produce the highest quality Ibérico products: Acorn Fed and 100% Ibérico breed. Our slaughtering, carving and salting facilities are used only 2 months out of the year depending on the availability of acorns in the meadows. This may seem economically and productively unacceptable, but from a quality point of view, it yields the most exclusive results.

Cinco Jotas' 70,000 m² facilities include the legendary natural cellars where we cure our products, and modernized next generation slaughtering and hand-slicing installations.

Our products are certified for export to the 5 continents. Our professionals are able to make the very best ham thanks to their experience, a handed down tradition of 130 years of dedication to the "art", perfected traditional recipes, 100-year-old natural cellars that ensure superb maturation and the Jabugo climate which lends a distinctive stamp of quality to the product.



Founded in: 1879

Number of employees: 320

Export markets: More than 35 countries worldwide, including major markets of Europe, the Americas and Asia

Products: Acorn Fed 100% Ibérico Ham, Shoulder, Ham, Loin, and Presa

Brands: Cinco Jotas and Sánchez Romero Carvajal

Certificates: UNE-EN ISO 9001; UNE-EN ISO 14001; Quality standard for Ibérico products (Royal Decree 4_2014)

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Cinco Jotas International Director

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Cogal

Integral rabbit breeding

Cogal is a cooperative started in 1985 as a result of the curiosity and foresight of a group of Galician rabbit breeders. It currently includes more than 200 farms spanning all of Galicia, neighboring provinces and northern Portugal.

Rabbit meat, low in cholesterol and with a sufficient percentage of unsaturated fatty acids (that help regulate cholesterol levels), is recommended especially for people with heart and circulatory problems. It is also recommended for diabetics, people with high blood pressure and the obese since it is very lean, low in calories and salt. It is high in vitamins and minerals, which is why, from a nutrition and dietetic standpoint, it should be part of a healthy and balanced diet.

Cogal is the only company in the national rabbit breeding sector that is backed by the Spanish Heart Foundation and the Familial Hypercholesterolemia Foundation.

On the other hand, it is the only rabbit producer on the Iberian Peninsula that follows the principal of an integrated closed-loop system of rabbit breeding that controls all of the processes. An expert team of professionals oversees each stage, from selecting female breeders, inseminating, feeding, raising, transporting and slaying in its own facilities, to distributing at point of sale. This allows us to fully guarantee the quality of our products and services.

Cogal is one of the largest meat rabbit producers and commercializers in Spain





Cogal

Founded in: 1985

Productive capacity: 7.500 T

Number of employees: 120

Export markets: Entire EU, Japan, Angola, Equatorial Guinea, etc.

Products: Fresh whole and cuts of rabbit meat; frozen whole and cuts of rabbit meat

Brands: Cogal

Certificates: IFS, ISO 22000

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Today, with over 7 million Kg/year, Cogal is the main producer and marketer of rabbit meat in Spain. We are the only company that can guarantee the traceability of our products from beginning to end using an innovative computer system based on RFID technology. We also have ISO 22000 and IFS certification.

We have always wanted to offer our customers, clients and consumers the best quality and variety of products. To accomplish this, we are investing in RDI (analysis and characterization of rabbit meat, mineral content studies, developing new products, etc.). These programs result in marketing a large variety of fresh and frozen cuts and marinated products in new presentation formats. We are currently working on new products.

In an increasingly more demanding market, the competitiveness of the many farms that work with us is ever growing. They have all evolved in modernizing their facilities, breeding, labor force, etc., thereby increasing Cogal's production rates and economic returns.

In addition to our primary markets - Spain and Portugal - we export throughout Europe and to countries as diverse as Japan, Equatorial Guinea, Angola, etc.

We hope that our daily work, joint efforts and initiatives encourage the development and growth of each and every one of the rabbit breeding farms that are part of COGAL, thereby contributing to the development of rural Galicia and neighboring provinces.



Corporación Alimentaria Guissona, S.A.

From farm to table

Our story began more than a half century ago, when a few people from Guissona (Lleida) and surroundings, new to stockbreeding, decided to set up the Cooperativa Avícola de Guissona, which, over the years became Grupo Alimentario Guissona. It has been a long and exciting process that our President, Mr. Jaume Alsina Calvet, lead from the beginning.

The decade of the 1950's revolutionized the rural world: agricultural mechanization was the start of a migration of the rural population to the city, the promised land. These changes in the rural world opened the door to new opportunities for prosperity.

That is how, despite our lack of expertise, we undertook a new adventure: farming, with only a few hundred chickens and pigs, but with inestimable courage and determination. Many people got involved in our project and all of them have been essential to making it possible. We share the satisfaction of having achieved our goals within a professional, and endearingly friendly environment.

The fact that we have created more than 4,000 jobs has been very important for our little town, Guissona.

We believe that our progress in the field of agricultural production, and especially livestock, is a result of us not only having faced difficulties, but of having taken advantage

We carry out all the processes in the food chain: cereals, compound fodder, hatchery, breeding and fattening, slaughtering, cutting, filleting and meat processing





of the opportunities that arose during the development of farm activities, which led to our vertical integration moving forward towards the end consumer.

The complete cycle "from farm to table" is Grupo Guissona's ongoing challenge. To achieve this, we carry out all the processes in the food chain: cereals, compound fodder, hatchery, breeding and fattening, slaughtering, cutting, filleting and meat processing.

We reach industrial clients, wholesalers, the hotel, restaurant, catering sector, large retailers and every sales channel. We also reach the end consumer through our own network of more than 400 "bonÀrea" stores.

Agropecuaria de Guissona S. Coop. Ltda., is the original cooperative of the Grupo Guissona. Nowadays, it is in charge of breeding and fattening activities at the farms of cooperative members, while Corporación Alimentaria Guissona S.A. is engaged in industrial activities and marketing all the group's products, with slaughtering, cutting, processing and logistics all carried out at our Food Center "La Closa", located in Guissona.

We work to meet the demands of more than 1,245,000 customers and we export our products to more than 25 countries. In 2012, our sales amounted to euros 1,425 Mill. Meat Commercialization Department: euros 815 Mill. (57%); Animal Breeding: euros 355 Mill. (25%); Energy and Engineering: euros 214 Mill. (15%); Animal Health and Farming Services: euros 25 Mill. (2%); Other: euros 16 Mill.

Corporación Alimentaria Guissona, S.A. 

Founded in: 1959

Productive capacity: 1.602.887 T for the whole activity

Number of employees: 4.171

Export markets: EU 28, rest of Europe, Russia and the Commonwealth of Independent States (CIS), Middle East, ASEAN, Far East, Canada, Latin America, Sub-Saharan Africa

Products: Fresh and frozen pork: (loin, ham, shoulder, tenderloin, bacon, etc.), fresh and frozen poultry (chicken, turkey, quail, hen, etc.). Processed meat: cured ham (White/Ibérico), cured cold-cuts, fresh and cooked cold-cuts, frankfurters, pate, kippers, single and multi-serving prepared dishes, broths, creams, sauces, milk, dairy products, wine, olive oil, eggs, frozen fish and vegetables and a wide range of products for the hospitality industry

Brands: bonÀrea, bonmAscota, Arrullo, bonAcasa, del Rebost, CAG Guissona, Khörmant

Certificates: ISO 9001, ISO 14001, ISO 22000

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ElPozo

Food solutions based on meat protein

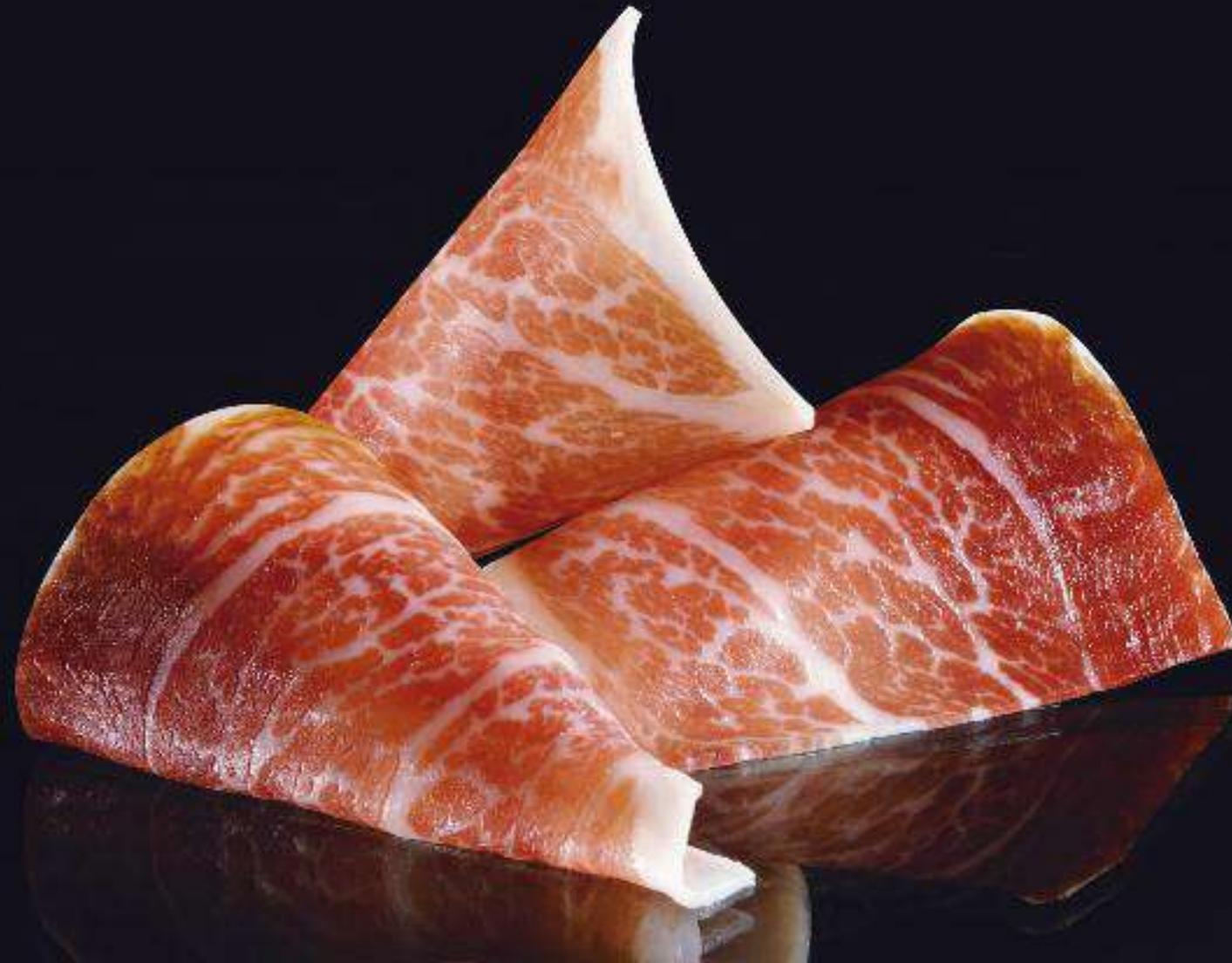
ElPozo Alimentación is the flagship of the Grupo Fuertes holding company, and is effectively a core business. It offers meat protein-based food solutions, using a unique production model: Integrated Process Control (IPC).

ElPozo Alimentación is 60 years old in 2014, years characterized by its strong commitment to continual 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, nutritional and sensory appealing and wholesome foods that provide an abundance of health, pleasure, well-being and comfort. To achieve this, 1% of the total turnover is invested in R&D+i.

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

R&D is at the heart of our Company. We Invest 1% of our turnover in this concept





A strong adherence to customer service is the main differentiating factor. This was achieved from the beginning by introducing the unique and pioneering Integrated Process Control (IPC). This tracking system directly oversees all activities: researching customer needs and demands, information obtained from point-of-sale, raw materials to produce feed, breeding farms and production, processing, manufacturing, marketing, services provided to distribution chains, and personalized customer service. This is how ElPozo offers food solutions that nourish and deliver health, flavor and convenience, and how it demonstrates its commitment to nutrition and well-being.

As part of Grupo Fuertes holding company, the firm is characterized by 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. Next-generation facilities, a leadership team, and innovative food solutions are the ingredients required for this challenge.

ElPozo believes in the future, as evidenced by high levels of investment. In the last three years alone (coinciding with the financial crisis), it invested euros 123 Mill. in upgrades.



Founded in: 1954

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

Number of employees: 3,661

Export markets: 82 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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Embutidos Goikoa

The real taste

There are flavors and aromas that we remember, that are forever embedded in our memory, and that recall 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 more than 80 years ago by Eugenio Jiménez in a small butcher shop in Sangüesa (Navarre). His son, Javier, the force behind the company's growth, focused all his efforts and attention on mechanizing his father's business. Today, it is his children who lead the company which is strongly committed to international expansion, Goikoa's strategy for growth and development.

The company is committed to adapting to the demands of new markets, and especially to exporting, 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.

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 currently a major national producer of prepared and cured meat products. It is mostly known for its pre-packed sliced meat products, currently the fastest growing format compared to traditional fresh-sliced meats. Of the 5,000 processed meat companies that exist in Spain, Goikoa ranks in the top ten. Our commitment to meet the needs of our customers is why we continuously broaden the product range. Currently, our portfolio includes the main deli meats, both cured and cooked, and meat spreads in every format. This allows us to reach a wide variety of customers: large retailers, traditional retailers, restaurants, manufacturers, etc.

In the last eight years, we have focused our efforts on international expansion. As a result, 40% of our turnover is currently generated in foreign markets. Goikoa products are sold in 20 countries with most sales coming from the European Union, specifically the United Kingdom, France and Germany.

Our company has 20,000 m² of modern facilities that we update continuously in order to fulfill the requirements of the most demanding markets. That is why we can say that ours is one of the most modern pre-packed sliced meat plants in Spain. Both plants in Sangüesa have received BRC (A), IFS (Higher Level) and Lista Marco certificates.



Founded in: 1981

Productive capacity: 15,000 T

Number of employees: 110

Export markets: UK, France, Belgium, Germany, Holland, Italy, Ireland, Portugal, Andorra, Czech Republic, Poland, Lebanon, Equatorial Guinea, Dominican Republic, Hong Kong, Japan, etc.

Products: Cured cold-cuts: chorizo, chorizo sarta (tied in traditional manner), Pamplona chorizo, cooking chorizo, snacking chorizo, Catalanian sausage, sausage, pork loin, pancetta, appetizers, Serrano ham, cooked ham and pork shoulder, mortadella, bacon.

Turkey products: breast, mortadella, chorizo, sausage

Brands: Goikoa, Goikoa Prestigio, Goipavo, private labels

Certificates: Certificates of origin: Spanish Serrano Ham Consortium. Other certifications: BRC (A), IFS (Higher), Lista Marco

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Embutidos La Hoguera

Flavors of old

Embutidos La Hoguera is a food company started in 1986. The business involves the entire value chain, from pig production, slaughterhouse and cutting room to product processing. We at La Hoguera believe that combining tradition, technology and research is key to producing top quality foods. These precepts which we have carried out from the start have made La Hoguera a major brand committed to health and the future.

Our company is located in San Pedro Manrique (Soria) which is situated 1,500 metres above sea level in the Alcarama mountain range and is known both for its religious and leisure activities (the traditional walk through fire on Midsummer's Eve) and its well-made sausages and hams, which have been produced and cured in this microclimate for years.

Embutidos La Hoguera started its first farm in 1975 and twelve years later, after establishing the correct basis, a company was created to make products that they can be proud of. Livestock is leisurely raised on wholly natural feed, basically cereals without saturated fats: corn, wheat and barley. This makes the pigs large and fat, with better made, more delicious meat, ensuring that all products are top-quality: this is the origin of our best raw material.

At La Hoguera we believe that combining tradition, technology and research is key to producing top quality foods





Our company is established and ever developing. In recent years, we have experienced growth in production, staff and range of products, and most of all, in quality and food safety, as well as our commitment to rural areas, the environment, health and the people of this land, our people.

We raise native breeds on our farms and cross them with the most prestigious breeds in the market (Duroc, Large-White, and Landrace). These crosses (hybrid strength) reach higher levels of improvement than those expected of their genetic inheritance and thus the animals are superior to thoroughbreds. Our facilities are ideally suited to the business. We give special attention to hygiene through the periodic cleaning of all areas (ceiling, walls, floors, etc.) and to perfect care and maintenance of the pig stalls.

Our farms' position, the drying process in our own installations, with technically advanced drying chambers using the traditional system, Soria's most appropriate climate and old-fashioned production methods ensure that La Hoguera's hams and sausages please the most demanding palates.

The farm produces 40,000 pigs per year with nine months of breeding, which results in a high quality raw material in level of fat infiltration, very close to that of Ibérico pigs (Duroc genetics).

Embutidos La Hoguera has invested in increasing its productive capacity and in upgrading processing procedures in order to raise the quality and food safety of all of its products, as well as to modernize its image both nationally and overseas.



Founded in: 1986

Productive capacity: 350, hams and 8,000 T of cold-cuts

Number of employees: 62

Export markets: EU, Australia, Hong Kong and Ukraine

Products: Ham and cold-cuts from the Serrano, Duroc and Iberian pigs

Brands: La Hoguera, Duroc, Fuentebella, Alcarama

Certificates: IFS, BRC, EG, ISO 9001, Iberian Quality Certificate, Tierra de Sabor Certificate, Lista Marco (establishments authorized to export meat products)

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Frimanचा

Specialist in Ibérico pork and renowned for its beef

Frimanचा's history dates back to 1966, when a Group of private investors decided to found what was then called Matadero Frigorífico Manchego, The Refrigerated Abattoir of La Mancha, in Valdepeñas. After 4 years of intense preparation we started our strongly family-oriented business thanks to the effort and dedication of 20 employees and concentrated primarily on cattle slaughter. The turning point of the company came in 1976 with the arrival of Moisés Argudo at the helm and Frimanचा started to evolve into the company it is today.

The change was founded on the 5 basic pillars which Argudo considered fundamental in governing any business enterprise: answering investor confidence, working hard, using the best available human resources, being able to adapt to the environment and reinvesting profits towards the improvement of the company.

With these principles hardwired in Frimanचा's DNA, the company underwent a period of constant growth and expansion during the 80's and 90's, both in terms of business (with the manufacture of meat products) and in terms of territorial reach (starting its export activity).

This process reached its peak in 2002 with the incorporation of one of the main food and agriculture groups in Spain: the VallCompanys group, broadening the company's horizons.

Our 5 pillars: answering investor confidence, working hard, using the best available human resources, being able to adapt to the environment and reinvesting profits towards the improvement of the company





FrimanCHA is the culmination of the integrated production process of the VallCompanys Group. Thanks to our modern facilities and highly qualified staff, the group has become a market leader in the field of meat production.

The slaughter and quartering of cattle is performed in compliance with the strictest quality guarantees, offering a product – be it fresh or frozen – which satisfies all health, technological and sensory requirements, destined for both national and international markets.

FrimanCHA's beef has made a name for itself. FrimanCHA boasts farms dedicated to the rearing of Granja Vallehermoso brand beef. We certify the beef's quality according to the strictest production criteria and apply these throughout the entire process, starting with the cattle selection by age, the diet based on cereal, fodder and minerals and concluding with its retail. The entire process is guaranteed and certified by the independent body Certicar.

We specialize in Ibérico, Duroc and White Pork. We invest heavily in innovation, variety and constant quality improvement. In spite of the fact that we are an established company with a broad range of processed products – fresh, cooked, smoked and precooked – our star product at the moment is fresh Ibérico pork reared on cereal and fodder.

Over the years VallCompanys and FrimanCHA have reared and improved the genetic lineage of their cereal-reared Iberian pork together. 2014 is the long awaited moment in which we introduce our entire fresh meat range, packaged with cutting-edge technologies, both to the national market and to important international markets capable of recognizing the quality of this meat which is so unique and Spanish.



Founded in: 1966

Productive capacity: 60,000 T

Number of employees: 500

Export markets: France, Italy, Portugal, Russia, Japan, etc.

Products: Pork cuts (White, Ibérico and Duroc); bovine cuts, processed meat products (fresh, cooked, smoked and cured); poultry channels and cuts

Brands: FrimanCHA, Ternera Granja Vallehermoso (bovine); Veteado (Duroc pork), Finura (Ibérico pork), Frihalal

Certificates: IFS, Calicer (Ibérico pork), Certicar (bovine), Lista Marco

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Incarlopsa

Quality pork products

In 1978, brothers from the Loriente Piqueras family decided to create a family business called Incarlopsa (Industrias Cárnicas Loriente Piqueras, S.A) to produce and process quality pork products.

With enthusiasm and great determination, the four brothers were able to carry out a project that has become a large company.

They started with a small slaughterhouse in Tarancón (Cuenca), where the animals were slaughtered and carved in the primitive manner of that time, a difficult and laborious undertaking.

In the 1980's they began to see a return on their effort and commitment. That is when - as a result of good business management and all of their achievements - it became necessary to expand the facilities and upgrade technology by installing a refrigerated slaughterhouse, cutting room, sausage plant, ham drying areas, cold-cut factory, etc.

Today Incarlopsa has over 122,000 m² in installations and more than 1000 professionals that receive ongoing training.

Incarlopsa's primary business is producing and processing meat products. Our main objective is to offer traditional flavors, top quality and the highest assurances thanks to our rigorous health controls.

Our main goal is to offer the highest quality, best guarantees and traditional flavor in our pork products





The product line is divided into:

Pork. We focus all our attention on animal selection, using only those genetic lines that ensure top quality meat. We monitor food to make sure that it is natural (from suckling to adult pig) and we guarantee the welfare of the animals when bred and handled at our facilities. We carry out extensive health controls and use the most advanced technology to track our products.

Cured Ham. This is one of the company's most important categories. The quality of the raw material is the first step in obtaining a good cured ham. Therefore Incarlopsa only processes pieces that come from animals selected and carved under its control.

Iberian Products (fresh, cold-cuts and cured hams and shoulders). We not only monitor all production processes, methods and systems, but also the race, animal genetics, food, slaughter and curing, to thereby guarantee the quality and food safety of our Iberian products.

Sausages. The production of processed meats like cooked sausage is another major mainstay of Incarlopsa. We use pieces that come from our slaughterhouse to prepare it as well as cold-cuts, smoked and cooked meat, etc., thereby ensuring that they have been processed and tested for quality and food safety.

Sheep. We apply the same technology and precision to this category as we do in monitoring pork, in order to ensure the best quality in all of our products.

Incárolopsa
Calidad por Naturaleza

Founded in: 1978

Productive capacity: Cured hams and pork shoulders - 5.25 Mill. hams/per year; Slaughter: 3,200 pigs/per shift; Cutting room: 3,200 carcasses/per shift; Sausages: 36.000 T/per year; Other processed products: 3,000 T/per year; Iberico cold-cuts plant: 8.000 T; Cold storage: 4,500 T; Ham and pork shoulder slicing plant: 65 Mill. packages/per year

Number of employees: 1,093

Export markets: Angola, South Korea, Ivory Coast, Philippines, Georgia, Hong Kong, Japan, EU (France, Portugal, Italy, Germany, Hungary, Romania, Czech Republic)

Products: Fresh pork: White pig and Iberico pig, fresh sheep, cured Serrano ham, cured Iberico ham/pork shoulder, Iberico cold-cuts, cooked sausages, traditional cold-cuts

Brands: Incarlopsa and Sierramon

Certificates: : ISO 9001, ISO 14001, IFS, Lista Marco, halal, ETG

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Jamones Aljomar

A family's work

Established in 1992, Jamones Aljomar is a family-owned company that produces the best Iberico pork products. Our products are guaranteed by the high quality of raw materials and the perfect harmony that exists between traditional production methods and the most modern technical controls. They are the result of the unparalleled climatic conditions of its surroundings and the dedication and hard work that the Aljomar family puts into bringing products of extra ordinary quality to the marketplace.

Aljomar's international expansion plan includes not only exquisite products such as ham, loin and Iberico cured meat products, but also fresh meats, highly valued by several gastronomic cultures. Our production process is characterized by its uniformity, thanks to our closed-loop vertical integrated production system which, includes the ham and cured meats plant, also our own food plant, farm and slaughterhouse. This chain allows us to track our products at all stages of production, from the selection of the cereal to choosing studs to monitoring slaughterhouse and plant processes.

We take pride in the achievements, which through perseverance and effort of a family, brings the Iberico pork culture to the rest of the world. Alfonso Sánchez Bernal and his wife, María del Carmen Sánchez Álvarez, founded what today has become a great company and - model for the

Our products are guaranteed by the high quality of raw materials and the perfect harmony that exists between traditional production methods and the most modern technical controls.





Iberico pork sector, whose products can be found in Europe, Asia, Africa and America.

Jamones Aljomar faces challenges and improvements to achieve customer satisfaction. A company intent on reaching as many palates as possible, even those that suffer from certain food allergies. That is why our Iberico ham and shoulder products are lactose and gluten-free.

We care about people and about the environment. We do carbon footprint studies and periodically reinforce our policies to reduce the impact our production processes may have on the biosphere. We also separate animal sub-products from waste – such as plastic, paper and oil – for it to be properly processed.

Of particular note is the fact that our premises are certified to meet the most demanding requirements, as well as the industry's sanitary and traceability regulations.

At Aljomar we frequently welcome foreign importers; we also travel to their countries to meet them to better understand their needs. We also carry out socio-economic studies of the countries we wish to export to in order to adapt our products to the local culture in order to show the excellence of the Iberico pork.

Aljomar's international expansion requires a great effort to make the company and its products known. This rapidly growing initiative can be seen by our participation at international trade shows, both in Spain and other countries, such as the US, China, Brazil, Mexico, France, Germany, Japan and Singapore.



Founded in: 1992

Productive capacity: 50,000 carcasses /year

Number of employees: 45

Export markets: USA, China, Japan, Korea, Vietnam, Singapore, South Africa, Argentina, Mexico, Peru, Brazil, Panama, Canada

Products: Iberian ham and shoulder, loin and cured pork loin, various chorizos and sausages and fresh meat. Depending on the time of year, all products are either cereal or acorn fed

Brands: Aljomar

Certificates: Iberian Certificate of Quality, IFS, BRC, ISO 22.000, Lista Marco (approved for export), Adilac

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Canned fruits and vegetables, prepared dishes and others



Canned fruits and vegetables, prepared dishes and others

Spain enjoys a gentle and sunny climate, which has made it Europe's greenhouse for centuries. The Arabs perfected the irrigation systems set up by the Romans, importing sophisticated oriental hydraulic techniques. Their amazing water economy allowed them to improve the efficiency of harvests. And when Spain discovered America it started bringing back fruits and vegetables that surprised and delighted the whole world and now form part of its diet.

Until the 1960's, the agricultural sector was the pillar of the national economy. And although the structure of the Spanish economy has changed considerably in the past half century – today only 5% of the population works in agriculture – Spain is still Europe's greenhouse and leads the international fruit and vegetable commerce.

The excellent use of water resources and technological advances, have allowed us to find our space among the main fruit and vegetable producers of the world. Greenhouse farming (in the south and the Canaries) has been noticeably perfected. And all throughout the Mediterranean arch and Extremadura the complex irrigation systems have revolutionized farming. This, along with the sun which shines permanently on our country yield excellent harvests all year round.

The Spaniards started exploiting this "green gold" a long time ago exporting their fruit and vegetables to the world.

But the best way to reach even further was through canned vegetables. It is no coincidence that the areas that produce the majority of these products are located in the main agricultural regions. In this sense, three production areas stand out: (Albacete and the regions of Murcia and Valencia), the northeastern strip (Navarra, La Rioja and Aragón) and the south west of the Peninsula (Andalucía and Extremadura).

Every year, 1.9 Mill. T of canned vegetables for a value of approximately euros 1.818 Mill. are produced. The fruit and vegetable processing sector consists of 340 companies employing over 30,000 workers, not taking into account the thousands of day laborers who are hired during the harvesting seasons. Ever since its beginning, the industry has been export-oriented. Currently it exports nearly 55% 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 produced volume (and 38% of the revenue). This vegetable not only is of great importance in Spanish cuisine, which uses it as a base for all its stews and sauce bases, but its worldwide demand has never decreased since the Spaniards brought it from the Americas in 1540, introducing it to Europe. It was so well received that in Italy to this day they call it golden apple (*pomo d'oro*) and the French named

it the apple of love (*pomme d'amour*). The tomato-producing subsector primarily manufactures tomato concentrate, peeled tomato, tomato puree and tomato juice.

The quality and variety of the fruit produced in our country is also reflected in the processing industry. Canned fruit represents 33% of the overall volume and 27% of the sector's revenue. The most sought-after canned fruits are peaches, followed by tangerines, apricots, pears, strawberries and mixed fruit. In this subsector, the production of jams and marmalades is of great significance. A popular Spanish breakfast includes coffee and toast with either strawberry, peach, plum or berries jam or even more interesting flavors such as figs or tomatoes.

Vegetables bring color and vitamins to any dish. It is not unusual in a bar to order a canned pepper salad with canned tuna, or a Spanish potato salad (called Russian salad, a star tapa dish) made with canned vegetables. 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 19% of the volume and 31% of the revenue of the canning industry.

The main recipient is the EU, primarily Germany, followed by the USA. However the presence of Spanish fruit and vegetables – either canned, frozen or processed – in other

Ever since its beginning, the canning industry has been export-oriented. Currently it exports nearly 55% of its production (45% of its total revenue)

parts of the world like South America, Central America, Asia and the Middle East is greater every day.

The broad range of products, the high guarantees of food health and safety that the Spanish industry has to offer, place it at the head of the world canning industry. Furthermore, great modernization advances have taken place, and it has permanently adapted to current consumer trends with noteworthy investments in research, development and innovation of technological centers.

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. On the other hand, recent demand for organic products has been met by the industry, which has been developing organic ranges of products for some time now.



Audens Food

Your partner in kitchen solutions

Since 1975 Audens Food's vocation has had a clearly client-oriented bias with special emphasis on service. We specialize in the preparation and sale of a broad range of ready-made and precooked dishes and have become market leader in our field in Spain. Our catalogue includes a great variety of snacks, tapas, first courses, main dishes, side dishes and desserts which cater for restaurants and hotels's needs.

Our mission is to provide catering solutions for our clients whilst maintaining the quality and flavor of old times. We spare no effort in our quest, carefully selecting the finest ingredients, being respectful and scrupulous in the preparation process and aiming for product excellence, all in order to guarantee the utmost quality in a creative and innovative fashion. We guarantee a healthy cuisine thanks to the raw materials we use, our production process, and thanks to the advantages of freezing technology.

Our company produces its own brands Prielá, Frinca, Frinca Olé, Price, Doña Lupe and Buonabase. As a complete global supplier we also work for private labels as well as some of the most important third party brands.

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





We are the foremost Spanish manufacturer in terms of industrial capacity. The Audens Food group boasts an industrial capacity of 60,000 T shared between our four facilities in Granollers, Balsareny and Sant Fruitós in Barcelona and our facility in Roales del Pan in Zamora.

Audens Food's main plant (in Granollers) has a capacity of 24,000 T and manufactures croquettes, cannelloni, lasagna, snacks, tapas and a broad range of precooked ready meals. The industrial plant in Balsareny has a capacity of 8,000 T and manufactures different ranges of croquettes, *buñuelos* (fritters) and frozen vegetables. Our facilities in Roales del Pan have a capacity of 14,000 T and specialize in savory pastries, precooked meats, and fish and cephalopod-based products such as squid and squid rings. The industrial plant in Sant Fruitós del Bages has a capacity of 12,000 T and manufactures pizza, cannelloni, lasagna and croquettes.

All our plants are ISO 9001 certified. Our facilities in Granollers, Balsareny and Parets also have ISO 14001 environmental certificates and are IFS (International Food Standard) approved just as the Sant Fruitós plant is.

Our logistic hub in Parets del Vallés is where we focus the cold storage and distribution of the bulk of our group's products; with a capacity of 8,300 pallets and a completely automatic picking system we can guarantee an unbroken cold chain throughout the entire distribution process. Furthermore this facility has 5,000 m² for further expansion and we have recently started a new range of pizza bases.

AudensFood®

Founded in: 1975

Productive capacity: 60,000 T/year

Number of employees: 530

Export markets: France, Portugal, Belgium, Holland, United Kingdom, Germany, Norway, USA, Cuba, Dominican Rep., Mexico, Russia and Japan

Products: Croquettes, snacks, savory pastries, stuffed potatoes, lasagna, cannelloni, pasta dishes, ready-made fish dishes, cephalopods, meat, battered vegetables, tex-mex, pizza bases, pastry dough and churros

Brands: Prielá, Frinca, Frinca Olé, Price, Doña Lupe, Buonabase

Certificates: IFS-ISO 9001-ISO 14001

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Congelados de Navarra

One of the top 10 frozen vegetable producers in Europe



Congelados de Navarra is a dynamic young company with a presence in Europe since 1999. The year after Benito Jimenez Cambra founded the company in 1998, the first plant in Arguedas (Navarra) was opened. In 2001 new investments were made to face our clients' demand for new products. We specialize in grilled and pre-fried vegetables.

In 2004 Congelados de Navarra became the biggest broccoli producer in Europe. After 7 years' work and effort, Congelados de Navarra strengthened its foothold in 3 distribution channels (Retail, Foodservice and Industry). We have the most important certificates of quality and food safety standards - BRC e IFS -, that guarantee the compliance with APPCC and current food legislation.

In 2008 we opened our second factory in Fustiñana, Navarra. In 2010, in response to our growth and improvement policy, we built the second chamber at the Fustiñana factory. And in 2012, in response to our expansion and to our clients' needs, we opened a commercial office in France.

At Congelados de Navarra we offer both personal counseling through our commercial team and direct communication with the Quality Department. We offer our clients a broad range of vegetables that we personalize and adapt to their needs and their respective markets (cuts,

Only 5 years after its creation, Congelados de Navarra had already positioned itself as Europe's main producer of broccoli





blends, formats, etc.). We also constantly invest in research, development and innovation to develop products that adapt better and better to each client's specific needs.

Our outstanding research and development demonstrates our great capacity for innovation, both in our products and our production process. Our growth over the last years is proof of our determination to develop, making the most of the possibilities that the latest technology has to offer. We have a highly prepared, qualified team, committed to understanding the business, throughout our entire organization and on all levels.

Technology is a fundamental pillar of our success. Our investment in this field is constant, fundamentally to improve our production process and expand our premises in order to face our strong growth.

At Congelados de Navarra we believe that investing in our staff is to ensure our future. Their training is essential for the development of our company and reflects directly on the quality of our products and client service.

Our 2 production centers are equipped with the most modern technology in Europe. Both plants comply with all the requirements of BRC and IFS and have integral traceability system processes. Both infrastructures are designed according to environmental criteria, reducing water and energy costs. The production processes both in the Arguedas and Fustiñana centers are totally automatic, as is our internal logistic system.



Founded in: 1998

Productive capacity: -

Number of employees: 450

Export markets: Europe

Products: Traditional vegetables, mixed vegetables, rice, pasta and pulses, pre-fried vegetables, mixed and grilled vegetables, sautéed vegetables, herbs, fruits

Brands: Verdiricas

Certificates: IFS, BRC, HACCP

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Grupo Riberebro

Specialists in canned vegetables

Grupo Riberebro inherited 200 combined years of experience in the Spanish food industry from three family businesses. It was created from three historic canned food brands: Gvtarra, a benchmark in the Spanish canned vegetable sector since 1910; Ja'e, which has been making cooked legumes since 1970 and Ayecue (1982), a leading mushroom and farm-raised mushroom company that, thanks to its partnership with Eurochamp, has become the 2nd largest operator in this specialty in Europe and the 3rd largest globally.

Riberebro experts work hand in hand with farmers from Navarra and Rioja to carefully select the best possible raw materials. To ensure product freshness, their vegetables, legumes and mushrooms are delivered to the processing plants a few hours after they are collected.

One of Riberebro's main functions is to promote healthy eating. Therefore, it produces and markets edible plant products. Vegetables, legumes and mushrooms carefully prepared for people who follow a balanced diet and for those that enjoy cooking daily; highly nutritious healthy food, essential in Mediterranean cooking; products that are easy to make and that save time in the kitchen.

Mastering the value chain is key to Riberebro's perspective of the agro-industrial business. Only then is its commitment to quality and food safety possible.

To ensure product freshness, Riberebro's vegetables, legumes and mushrooms are delivered to the processing plants a few hours after they are collected





The company has reinforced its expertise in producing and marketing mushrooms, vegetables, legumes, asparagus and piquillo peppers. Its products are present worldwide through its own brands and those of its customers. In 2013, it provided over 4,000 selling units to 1,817 customers in 62 countries on five continents.

The company runs two divisions: canned goods and fresh food products. It operates canned food production plants that can process over 150,000 tons of fresh products annually; and it controls the entire manufacturing process of fresh mushrooms from compost pasteurization to final marketing.

Their specialists are a repository of a century's worth of knowledge in processing vegetables. The best technology in the service of quality and food safety, and strict control over all manufacturing processes ensure the traceability of their products.

Excellence in processing has made it possible year after year, for all of the group's production plants to successfully exceed international food safety audits.

By ensuring a sustainable value chain, Riberebro has gained the trust of thousands of customers worldwide. The Group's future is directed towards the global business of sustainable food plants, natural products that are flavorful and healthy for consumers. This is the company's main added value. Because when it comes to vegetables, natural is synonymous with excellence.

grupo
riberebro
Especialistas en conservas vegetales

ayecue GVIARRA JA'E Eurochamp

Founded in: 2007

Productive capacity: Cultivated mushrooms: 52,500 gross T, Vegetables: 11,206 gross T; legumes: 8,541 gross T; asparagus: 9,907 gross T; piquillo peppers: 8,114 gross T

Number of employees: 570

Export markets: 62 countries, mainly the EU, Middle East, North America and North Africa, with emphasis on the U.S., Germany, France, Greece, Israel, Italy, Portugal, Morocco, UAE, Kuwait, Australia

Products: Canned mushrooms, vegetables, legumes, asparagus and piquillo peppers. Fresh mushrooms (Champignon, Pleurotus, Shiitake)

Brands: Gvtarra, Ja'e, Viter, Ayecue, Eurochamp

Certificates: IFS, BRC, Global G.A.P., IFS Logistics

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Helios

Over 100 years in business. A century of know-how

Helios is a family-owned company with deep roots in Valladolid, with over a century of experience. The company is known for being an innovator, for the outstanding quality of its products and for being a leader in the jam market.

Our story begins at the end of the 19th century, when the great-grandfather of the current owners founded the sweet shop "El Sol", a bakery that would later become purveyor to the Royal Family. In 1900, the newspaper "El Periódico de Castilla" announced that the shop would give away a lottery ticket for the purchase of nougat candy, sugared almonds, liquorice and other products. One hundred years later that bakery has become a corporation with over 600 employees, and a leader in its industry, with a focus on expansion in foreign markets.

The opening of our factory in 1957 was a turning point for the company, which went from artisanal to industrial production. This step was taken with the aim of broadening the company's portfolio, with products such as vegetable preserves which enjoyed high demand under the Helios brand. After only 13 years product demand made it necessary to build a new factory; the one built in its present location.

Helios currently focuses on the production of jams, vegetable preserves, fried tomato, sauces, fruit preserves,

Helios stands out for its ability to innovate, the outstanding quality of its products and for being the leading producer of jams in Spain





pickles and quince paste, as well as a long list of high quality products.

Our current factory is 40,000 m². It is there that Helios produces, packs and distributes its products; both for Spain and other countries.

Quality is the basis of our business strategy. That is why we apply this principle to each stage of production, starting with the selection of raw materials. Our R&D department strives to make sure all products meet our high quality standards, to develop new products and to improve the existing ones. As proof of our commitment to quality we were awarded with the Best Innovation Award at Sial-Paris for our honeyed fruit reserve, a marmalade produced using the best available bitter oranges and honey from Spain.

Grupo Helios comprises the following companies:

Dulces y Conservas Helios S.A., parent company of the group whose main factory and headquarters are located in Valladolid. It produces marmalades and jams, fried tomato, sauces, fruit preserves and quince paste.

Iberfruta Muerza. Headquartered in Azagra (Navarra), it processes semi-prepared fruit in aseptic packaging frozen fruits, fruit preserves, for industrial use and marmalades and jams.

Grupo Helios has 4 factories in Spain, 2 in Germany and 1 in Kentira (Morocco), as well as two trade offices outside Spain: Iberfruta Europe, S.R.L. in Perpignan (France), and S.D. Parr in Manchester (UK).



Founded in: 1901

Productive capacity: 160 T/day

Number of employees: 600

Export markets: More than 50 countries including: United Kingdom, Algeria, Ecuador, Morocco, Japan, Mexico, Russia, Portugal, Egypt, etc.

Products: Jams, vegetable preserves, tomato purees and sauces, candied fruit, quince paste

Brands: Helios, Bebe, Eva, Mühlhäuser

Certificates: ISO, BRC, IFS

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Litoral

Traditional cuisine using only natural ingredients



At the Litoral factory, in the Principality of Asturias, we have been making Asturian cuisine's most important dish for over 60 years: fabada.

What started in the 40's as a small tinned fish factory in the Cimadevilla quarter of Gijón, evolved into a modern factory just outside that same town manufacturing regional dishes. Although fabada is our star dish we also offer an extensive variety of typical dishes from other regions of Spain.

In 1985 Litoral joined the Nestlé group and since then we have grown, adapting to the times and evolving into a modern factory which has brought employment and wealth to our region whilst maintaining its traditional essence.

If there's one thing that defines Litoral dishes it's the authenticity of traditional cuisine. The quality of our raw materials and the manufacturing process - in which the product is cooked inside the can itself, emulating our grandmothers' slow cooking at home - allows us to produce over 15 million cans a year. Furthermore, this allows us to keep all the authentic flavor with the convenience for the consumer of being able to enjoy the dish in only 3 minutes.

If there's one thing that defines Litoral dishes it's the authenticity of traditional cuisine, the quality of our raw ingredients and the slow cooking preparation just like our grandmothers'





We can guarantee the quality and unique flavor of our products since we control the entire manufacturing process, from the raw materials until the final product. We start with an exhaustive selection of the finest legumes and meats which are the cornerstone of our dishes.

All cold meats are prepared in our own factory, making us the biggest chorizo and black pudding producer in Asturias. Starting with selected meats and spices, we make the chorizo and black pudding mass, we stuff them and smoke them, according to tradition, with timber smoke. We finalize the process by controlled drying of the product to favor the genuine flavor, aromas and colors of Asturian cold meats.

When the cold meats come out of the drying process and the bacon is just right for cutting, both are added to the cans along with the rest of the ingredients. After including the meat, the legumes are added, having previously been hydrated using the ideal type of water, for the right duration and at the right temperature, just as we do in our own homes, which guarantees the appropriate texture once the dish is prepared.

Finally we add the broth which has previously been prepared, always using natural ingredients. The cans are then closed and undergo a thermal treatment similar to the one that takes place in a pressure cooker until the dish is fully cooked and sterilized for commercial use.

The result is a product with great nutritional value, prepared in a traditional way and always using natural ingredients, free from additives, preservatives or whitener. This allows us to combine the modernity of our facilities with the traditional preparation of the typical Asturian fabada.

Founded in: 1948

Productive capacity: 20,000 T

Number of employees: 100

Export markets: European Union

Products: Legume dishes, legume dishes with rice and vegetables, prepared vegetable and cold meat dishes, callos (tripe) and ethnic dishes from other cultures

Brands: Litoral, La Tila

Certificates: ISO 22001 (Food Safety), ISO 9001 (Quality), ISO 14001 (Environmental Management), OHSAS 18001 (Health and Safety in the workplace) and internal requirement NQMS (Nestlé Quality Management System)

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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 fish and seafood that could be obtained from its coasts. The strong demand for sea products from Hispania under Emperor Augustus' rule filled Spain with dry salting factories to supply Rome.

Documents from the 12th century show that through the fishing method known as *almadrabas* over 140,000 tunas were captured in a single trip. This method, invented by the Arabs and still in use today, consists in surrounding the tunas with nets that are progressively hauled in bringing the tunas to the surface where they can be harpooned by hand.

Today Spain is one of the world's major fish consumers, averaging 26.8 Kg (50 lb) per capita annually. Since national production is insufficient to supply the large local demand (46 Mill. inhabitants plus 55 Mill. tourists), Spain's state of the art freezer boats have moved to international fishing waters, mainly in the N. and S. Atlantic and in the Indian Ocean. However, artisanal fishing still takes place in the seashores of Spain. Presently the Spanish fleet is the number one in the world in terms of catches. Its 18,000 boats catch 13 Mill. T of fish annually.

Spain can be divided into 4 distinctive fishing zones: the Mediterranean arch, 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 the harvesting of shellfish. Galicia holds 45% of all catches, and its evolving industry holds the highest weight in catches in the sector. Its star products are octopus and shellfish. The north fleet has specialized in coastal catches such as sardine, hake and shellfish, but also goes to the Atlantic fishing waters to catch tuna, swordfish and cod. The Mediterranean arch accounts for 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 classical dishes. Anchovies (a classical ingredient of Caesar salads and pizzas, for instance) are consumed in Spain in tapas or on a toast.

Summer is sardine season and the best time to eat them, since their meat is juicier. Grilled, fried, barbecued, pickled or stewed, sardines are cooked in a wide array 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 some 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, mollusks and crustaceans.

Cephalopods – calamari, cuttlefish, baby squid, jumbo squid, etc. – are highly popular because they taste exquisite and are easy to eat, since they lack scales or bones. Mollusks 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, baked in cooking salt, deep fried, grilled, smoked, marinated or

preserved, fish and shellfish have been an excuse for Spaniards to show off their creative cuisine.

However, the sea's delicate balance has led to a considerable increase of fish farming. One fourth of Europe's fish farming production comes from Spain. Nearly 50,000 T of fish are harvested annually in its farms, and it is the 2nd largest supplier of gilt head bream and sea bass, although many other fish are also produced in these farms.

Spaniards consider preserves a culinary delight consuming yearly 4 Kg (9 lb) per person. While the Spanish fish preserve industry has incorporated traditional methods to its industrial processes – olive oil or pickling brine – technical developments enable it to can its products in brine, water, tomato or even cooked. While the tuna fish family preserves account for 68.5% of all its products, anchovies are a world apart, since they require a very elaborate, hand crafted process of preparation that goes back to the 19th century.

R&D is also playing an interesting role in the Spanish fishing industry. New technologies have enabled the creation of new fish products, such as caviar substitutes or surimi crab fingers. Seaweed is not an oddity anymore, and cold Galician shores have become the perfect location for growing and exploiting them commercially. In the end what matters is quality and taste, and in that sense Spanish sea products captivate anyone who tries them.



Conservas Ortiz

Handcrafted sea products

Bernardo Ortiz de Zárate started his preserve business in 1891, however the brine pickling plant managed by his wife, Petra Aréchaga Nafarrate, had existed since her grandfather Lázaro's times, in 1830.

Ever since Conservas Ortiz was established in the Basque port of Ondarroa, it has been committed to the preparation of the highest quality canned seafood. Today, 5 generations on, Ortiz still employs exclusively artisanal 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 acknowledged and Ortiz products are present 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 the 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 *bonito del norte* (white tuna).

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





Ondarroa and Zumaia is where the *bonito del norte* (white tuna) is prepared. Ortiz white tuna is fished during the summertime using artisanal 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 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 on our premises in Lekeitio or San Vicente de la Barquera in Cantabria.

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.

Founded in: 1891

Productive capacity: -

Number of employees: Depending on the fishing
Export markets: Over 50 countries across 5 continents, primarily in Europe and the United States

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

Brands: Ortiz, El Velero

Certificates: Organic and Kosher certified products

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



Dani Group

Family and tradition

In 1946 Daniel Sánchez Simón started out as a spice and canned food salesman setting the foundations of what is known as Dani Group today. His tradesman vocation carried him to all corners of the globe in search of products which could offer the best value for money.

Thus Dani Group started a family business which, over the years, has successfully adapted to different market trends, trials and tribulations, always offering a selection of high quality products. With the arrival of founding member, Daniel Sánchez-Llibre in the 1970's, and the determination to offer the consumer the best possible value for money, the company takes the strategic decision of gradually abandoning sales in favor of canning its own products. This decision will forge the path ahead for the company, and to a great extent is what propelled it to become the reference point it is in its field .

All of our production plants are equipped with cutting-edge technology in order to prevent any loss of quality during the canning process. This policy of investment in new production processes is the constant upon which we have built our brand's leadership.

Quality and creativity are the two fundamental principles with which our brand position differentiates itself in such a competitive market. Our mission: to establish and strengthen ourselves, to innovate and to bring new products to the market.

Our policy of investment in new production processes is the constant upon which we have built our brand's leadership





Dani Group has a number of different production centers dotted around the world. Our objective consists of getting as close as possible to the source of the best products in order to obtain them at their best.

In Ancud, a town on the island of Chiloe (Chile), we have a plant for canning clams, razor clams, hard clams, sea snails, macha clams and mussels which are then shipped to our headquarters in Vilassar de Mar (Barcelona) to be sent throughout the entire Spanish territory. Furthermore, in Chile we also have a freezing facility which to date is the foremost mussel exporter to Europe.

Our plant in Carnota, in La Coruña (Galicia-Spain), specializes in mussels, octopus, squid, different varieties of yellowfin tuna, prawns, surimi of baby eels, and cockles amongst others.

The facilities in Swansea (Wales) and Boston (United Kingdom) specialize in cooking and processing cockles (obtained with our own fishing boats).

Currently Dani Group is run by the third generation of Daniel Sánchez Simón descendants, who continue to maintain the know-how and quality associated to the group which have made Dani canned foods one of the most renowned brands in this market sector (canned fish, seafood and spices).

Tradition and family are the signature of the products which Dani Group markets.



Founded in: 1970

Productive capacity: 48,000 T

Number of employees: 98

Export markets: Chile, Brazil, Mexico, Uruguay, Bolivia, Costa Rica, Dominican Republic, Malta, Ukraine, Latvia, UK, Ireland, Italy, Austria, Denmark, Iran, Bulgaria

Products: Canned fish and seafood, spices and canned vegetables

Brands: Dani, Cabo de Hornos, DS

Certificates: IFS, ISO 9001, HACCP

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Friobas Basilio

Quality you can see

Founded more than a century ago, Friobas Basilio is the parent company of a group of businesses which has evolved over the years thanks to the hard work of the Castro family. Its adaptation to the needs of different markets and ongoing commitment to quality and innovation has positioned Friobas Basilio among the top Spanish fresh and frozen seafood companies.

In 2008, making the most of the synergy within the group of companies, a modern cannery was opened, entirely devoted to the production of select canned fish products. We use the best quality fish and shellfish from our own shores, and opt for species that are seldom processed or canned, that have great gastronomic potential. Starting with our own artisanal recipes we make products that are appreciated by the most demanding palates.

Thanks to the hard work of the research, development and innovation department, we have chosen glass jars for highly specialized markets as well as gourmet shops. This packaging allows full view of the product, which makes it easier for the consumer to appreciate its characteristics before purchase. This is the reason for our claim: *"Isla del Carmen canned products, quality you can see"*.

Isla del Carmen canned products are delicacies aimed at satisfying the most demanding palates





Isla del Carmen Canned products began as a venture with a lot of enthusiasm supported by an experienced entrepreneurial group in the fishing industry. The name was chosen in honor of the Isla del Carmen (an island with that name), located opposite Luanco (Asturias), a maritime village with a strong canning tradition, and as a tribute to the patroness of fishermen, the Madonna of el Carmen.

In order to satisfy market needs, which increasingly demand more exclusive and high quality products, we work mainly with Northern albacore, Rías Gallegas mussels and Cantabrian sea mackerel. Since they are processed while still fresh, they retain all the aromas and flavors that define and characterize them.

Northern albacore, which is fished in the traditional way with rod and line, is immediately processed with the utmost care to produce an exquisite, soft tuna belly and tuna loins in olive oil with just the right amount of salt and cooking time. Rías Gallegas mussels, which are cultivated on the best Galician *bateas* (rafts), are processed in pickled sauce in order to get one of the tastiest products within the whole range. The Cantabrian sea mackerel, an oily fish with great nutritional value, is prepared in the most traditional of manners: in brine or olive oil.

The product range includes other seafood, such as squid in its ink, mariskitos (surimi baby eels) in a spicy garlic marinade, octopus in extra virgin olive oil, octopus stew with small potatoes, small sardines and sea urchin caviar. Recently, albacore and mackerel in organic extra virgin olive oil have been added to the product portfolio, as well as albacore in cider, as a product that represents the gastronomy of Asturias.



Founded in: 1912

Productive capacity: 8,000 T annually on different production lines

Number of employees: 160

Export markets: EU, USA, Mexico, Panama, China

Products: Frozen, fresh and canned fish

Brands: Conservas Isla del Carmen, Conservas del Paraíso, ConserBas and Friobas

Certificates: ISO 22000, ISO 9001 and OHSAS 18001

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Pescaviar

Feed your senses

Achieving “unique and gourmet” status with a product which, at first sight, could be considered a mere caviar substitute was a huge challenge, and Pescaviar succeeded in doing so in 1997, when it developed it with the work of a group of food experts.

Pescaviar was born in 1997 with the aim of finding alternative and complementary products to the range of fish eggs available on the market, which were either excessively expensive or of unsatisfactory quality.

Pescaviar is currently the world leader in marketing high quality caviar substitutes, as well as fruit and sauce pearls and other unique products, always at competitive prices.

Our policy consists of developing “clean” products, avoiding colorings and artificial preservatives and without the need to enhance flavors or use artificial additives. The top quality of the prime materials used in manufacturing our products guarantees their original aroma and flavor.

At Pescaviar we have managed to develop, using a unique and patented technique, a process of transforming fish into pearls using the finest raw materials the sea has to offer.

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In 2009, in the wake of culinary innovation, we developed a pioneering ingredient inspired by the avant-garde technique of spherification: Cocktail Pearls, perfect spheres that explode in your mouth releasing an intense flavor.

The same year, we started marketing Chovas, fish cream cheese spreads, a unique and original combination in a market where it was already very difficult to innovate.

Our products' prestige has been recognized with numerous awards such as the recent Best Innovative Product of 2012 awarded by www.msc.org to Arënkha MSC, the Tavola award for best catering product (3th place) for Trufka or the Tavola award for best catering product (2nd place) for Cocktail Pearls, among many others.

Our processes are guaranteed by IFS and BRC certificates (Grade A). We have the industrial and technological capacity to develop new products, and we represent established and successful brands, (especially the very renown brand Avruga/Arënkha). We are leaders in our market segment of retail distribution in Spain and position ourselves as a premium range in over 30 countries across 5 continents.

We currently work day after day, not only broadening our presence in international markets, but also developing new products to answer the market's ever growing requirements, both in terms of innovation and of sustainability.

Pescaviar

Founded in: 1997

Productive capacity: 250 T/year

Number of employees: between 10 and 50

Export markets: E.U., USA, Canada, Mexico, China, Japan, Singapore, Malaysia, Taiwan, South Korea, Thailand, Hong Kong, Australia and Tunisia

Products: Caviar substitutes, fruit and sauce pearls, cream cheeses and fish pastes

Brands: Avruga, Moluga, Arënkha, Cocktail Pearls, Chovas

Certificates: IFS, BRC, MSC

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Zarafish

Enjoy the sea at your table

The founders of the company, all of them with a deep knowledge of the world of fishing and the seafood sector, decided to join forces and knowledge to start a different project from those already on the market.

After 7 years building buyers and quality-control teams and consolidating relations and alliances with providers, Zarafish launched in 2009, a new project for manufacturing innovative and quality fish products.

Zarafish is quality, innovation, health and nutrition. Under this value proposal, we offer a broad range of products and solutions for clients and consumers. It is our goal to continue being part of those unforgettable moments to share and enjoy the finest seafood products with friends and family.

Our company's location is no coincidence: Zaragoza is an excellent location for optimizing Zarafish's distribution services. Responsible fishing, supporting our workforce and our commitment with our clients and society are fundamental in everything we do.

It is our goal to continue being part of those unforgettable moments to share and enjoy the finest seafood products with friends and family





Ever since the beginning, our policy has been professional service and the great quality of our products. Zarafish has highly qualified research and development, innovation and quality departments that play a key role in improving the characteristics of our products and whose vocation is to satisfy today's consumer habits and demanding needs.

That's why we constantly launch new products that add value to today's consumer, an ever more demanding and informed consumer. In 2013, as well as improving our current products (sea products made from the Pacific's giant squid (*Dosidicus Gigas*), we launched our new Health and Nutrition range, 100% natural products with no additives that, alongside other great added value developments, found great acceptance on the market.

Zarafish's 11,000 m² innovative facilities, equipped with cutting edge machinery, allow us to research and develop the highest quality products, as well as guarantee a constant supply under the strictest food safety controls.

Preparation rooms, temperature-controlled storage, cold storage and frozen storage are some of the spaces we make available to our clients to achieve the most appropriate product for every need.

In the years to come we shall continue our policy of Corporate Social Responsibility, which has given us so much personally and professionally. The growth and support of our workforce, the commitment to client and consumer, as well as with society in general, will always be part of all our future actions.



Founded in: 2002

Productive capacity: 2,500 T/year

Number of employees: 40

Export markets: Italy, France, Belgium, Holland, Germany, Portugal, USA, etc.

Products: Cooked treated and frozen gigas products (*Dosidicus gigas*): tentacle slices, tips, bits & pieces; raw treated and frozen gigas (*Dosidicus gigas*): rings, buttons, tails, dice; additive-free (100% natural) frozen products: tentacle slices, cooked tails, gigas filet pieces, stuffed baby cuttlefish; new developments: squid burger, mini-squid burger

Brands: Captain Nutricious

Certificates: IFS certification in process

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Sweets, chocolates and industrial bakery



Sweets, chocolates and industrial bakery

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 3rd 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 14th century, and there are documents proving that the bakers' guild in Barcelona 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 315 varieties, many of which with 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, *candéal* 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

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 bread crumbs and meat.

To a Spaniard a sweet is a concentrated piece of happiness. It should therefore come as no surprise that the Spanish sweet industry is the 5th confectionery and the 1st sweet and chewing gum manufacturer in Europe. In 2012, 851.954 T of sweets were eaten in Spain for an overall revenue of nearly euros 3,300 Mill. But the quality and range of our confectionery transcends our borders. 32% of production is destined to foreign markets, primarily the EU (73%), although exports to other countries have been growing in the past years (27% in 2012).

Pastry, cakes and confectionery manufacturing methods vary significantly and always guarantee the utmost quality and the use of the finest ingredients. In 2012 the Spanish bakery and confectionary sector produced 167,108 T, experiencing a powerful growth in its exports (8.603 T). The Spanish market grossed euros 758 Mill. in 2012.

History of sweets is closely linked to sugar's history. In 1747 a German scientist discovered the sweetening properties of sugar beet. But it was not after World War II, that the

Spanish sweet industry is the 5th confectionery and the 1st sweet and chewing gum manufacturer in Europe. 32% of its production is destined to foreign markets

industry developed new formats, textures and flavors. The Spanish sweet and chewing-gum industry ranks 1st in the EU, reaching a volume of 109,533 T in 2012 inside Spain and exporting 121,016 T. One must underline the sector's efforts to deliver sugar-free products and products with no added sugar to the consumer.

Some of the most typical sweets are *turrone*s (nougats) and marzipans, without which Christmas in Spain would be unthinkable. There are countless varieties: hard nougat, soft nougat, chocolate flavored nougat, *guirlache* (brittle nougat) etc. Its origins, as with marzipan, date back to Arab colonization. Spain is the 1st worldwide manufacturer of Christmas sweets - 31,400 T worth euros 272 Mill. -, which are exported to Latin America and the Far East. Although the process has become automated, its manufacture is still traditional.

As far as chocolate and cocoa are concerned, one must not forget that it was the Spaniards who brought it from the Americas around the year 1520. However it is not until the beginning of the 19th century that it started being manufactured in bar form. In the twentieth century new

formats came onto the market such as soluble cocoa, spreads and chocolate bars.

In 2012 in Spain 204,311 T of this delicacy were eaten, with a value of euros 1,132.7 Mill., whilst 60,803 T, with a value of euros 369 Mill. was exported. Per capita consumption of chocolate and its derivatives is 6.74 Kg/year. And with an annual consumption of 1.2 Kg per person, Spain is the biggest consumer of soluble cocoa worldwide.

Honey is also deeply rooted in Spain, the first honey producer in the EU and the 12th worldwide, producing 33,571 T in 2012. In 2012 over 19,661 T were exported. Spain is also the European country with the greatest number of apiaries, or beekeeping farms, (24,230), beekeepers and hives (2.5 Mill.). 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 variety of climates and ecosystems of the country allows the production of a great variety of honeys, especially Mediterranean flora, such as thyme, rosemary, lavender, holm oak and orange blossom, although 46% of manufactured honey is *milflores*, made from numerous different flowers.



Chocolates Valor

A passion for chocolate for over 130 years

The story of Chocolates Valor is about a passion for a unique product: chocolate. Behind the 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 dark 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 flavors.

We currently manufacture our products at a facility in Villajoyosa (Alicante). The modern 22,000 m² factory, relaunched in 2005, is where we make more than 12,000 tons of chocolate every year, accounting for a 15% share of the Spanish chocolate bar market.

Our master chocolatiers use the finest raw materials to produce an entire range of products, from bean to bar, and a unique blend of cacao from different countries to attain the unmistakable flavor of our chocolate bars





By paying special attention to innovation today, 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 products, “from bean to bar”, and a unique blend of cacao from different countries to attain the unmistakable flavor of our chocolate bars.

Our Premium “All Natural” Bars include the new 100g Dark Chocolate 70% with Mediterranean salt, an incredible way to enhance the flavor of the best dark chocolate. This is the latest of our “All Natural” and “All Natural, no sugar added” 100% chocolate bar assortments using Stevia as a natural sweetener.

And new this year are the 100g lactose-free milk chocolate bars. In addition to restyling the line of traditional chocolate bars, the company developed “Taste of Spain”, a selection of Chocolates Valor’s most popular products redesigned for the travel retail channel.

Valor currently exports to 50 countries with an annual double digit growth, especially in America and Asia.



Founded in: 1881

Productive capacity: 12,000 T

Number of employees: 255

Export markets: 60 countries through gourmet and Duty Free channels. Primary clients: USA, Colombia, Philippines, China, Canada and Chile

Products: Chocolates: sugar free, Premium and Marcona almond range

Brands: Valor

Certificates: ISO: 9001, IFS

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Delaviuda

Making the World a sweeter place

It all began in 1927 when Manuel Lopez and Maria Rojas opened a small candy store in Sonseca (Toledo). When Manuel died in 1939, Maria took on the responsibility of caring for their two children and the family business. As time went by, the business grew and in the 1940's, the products were being distributed by railway to several cities in Spain.

During that period, the actual consumers named the brand because they purchased "sweets from the widow" (*dulces de la viuda* in Spanish).

Successive generations of the family have till this day continued the work. Her son opened a small factory in 1963 to satisfy the increasing demand for their products throughout Spain. The brand Delaviuda was registered in 1973 and started selling under that brand name. Our current plant was opened in 1975 and has been upgraded year after year thanks to major investments, which have allowed us to diversify our product range and present our consumers an attractive and exclusive offer.

Delaviuda combines tradition and experience with research, development and innovation, to make this one of the most important brands in our market. Our products are currently available in more than 70 countries.

Delaviuda combines tradition and experience with research, development and innovation, to make this one of the most important brands in the Spanish market





Delaviuda centralizes all of its production in one plant. It has a total surface area of 25,000 m² (almost 6,000 m² are used for warehousing and the rest for production). The 28 lines have a total capacity of 100 T/day; and total plant production is 9,000 T. In 2009 we inaugurated a new and fully automated logistics warehouse with a capacity for 22,500 temperature controlled pallets.

Our R&D Department constantly updates and improves all the manufacturing processes, with special emphasis on food quality and safety. As for quality, we always work with carefully selected top-grade raw materials. Our professional tasting team does internal sensory analysis on a regular basis, where they test flavors, textures and the visual aspect of each product in specific rooms prepared for that purpose. All parameters of quality management are integrated in SAP.

We meet the highest and strictest quality standards as well as the industry's systems of guarantees. The plant has been certified by SGS with ISO 9001:2008 since 1997, and IFS since 2008 (with a 97.5% score). Recently, we have received Grade A certification from BRC. We also have the necessary pre-established procedures to guarantee our internal traceability (ascending and descending) and to extend it to our clients.

We are committed to protecting the environment. Therefore, by meeting European packaging laws, we adhere to Ecoembes (the Spanish organization in charge of recycling containers), and also to the responsible treatment and management of waste derived from manufacturing processes.



Founded in: 1927
Productive capacity: 100 T per day. Total production 9,000 T
Number of employees: 355 (on average)
Export markets: more than 70 countries on every continent: USA, Venezuela, United Arab Emirates, Australia, Portugal, Russia, etc.
Products: Nougat, marzipan, chocolates, cookies and cereal bars
Brands: Delaviuda, El Almendro
Certificates: ISO 9001:2008, IFS (International Food Standard), BRC
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Miel Feyce

The Nº 1 honey exporter from Spain

Feyce, S.L. is a century old family owned business with 25 million Euros in revenue and an international orientation, since it exports 80% of its production. This holding company started a century ago in Valero, a township of Salamanca, place of origin of the Redondo family, the company owners. In 1910, Esteban Redondo got his start in beekeeping and producing artisanal honey. Half a century later, the second generation owners decided to expand the business by marketing and packaging bee products.

In 1980 the company reached a milestone when it moved to Aldeatejada and built the first honey packing plant - a 1,000 m² facility - in a better geographic and logistical location near the provincial capital. Five years later the first industrial packaging line of honey was installed to supply local, regional and national demand.

In 1995, when Cesar Redondo, third-generation family member and current CEO joined the business, international expansion began. By 2006, Feyce honey was already in 15 countries. A year later, it ranked among the industry's five largest companies in Spain.

An euro 8.25 Mill. investment in 2009/2010 resulted in the largest honey processing and packaging plant in southern Europe. Located in Aldeatejada (Salamanca), the 7,600 m² facility is owned by Feyce. Equipped with the latest

We have Southern Europe's largest honey processing and filling plant, with a daily production capacity of 72 T and 12,000 T per year





technology and a productive capacity of 72 T per day, it allows us to offer unparalleled service to our customers worldwide. We export 80% of our products to more than 25 countries in Europe, North Africa and the Middle East. The group's parent company closed 2012 with a production of 6,500 T, making it the largest company in the industry in Spain and among the 25 largest in Europe.

Five lines of latest-generation, high-speed, automated packaging enables us to manufacture a wide range of products, packaged in any format the customer requires.

Our commitment to quality and food safety goes beyond the strictly legal - from acquiring the raw material to delivery - thereby assuring that our customers receive a product in optimum condition. We do all product assurance testing at international laboratories specializing in honey. We have received the highest level of IFS and BRC certification that confirm maximum quality standards.

Feyce offers customers comprehensive product development services based on overall quality, as well as value-added brands like Las Abejas and Bonapi, and custom private-label backed by a broad range of experience and more than 500 referrals worldwide. Feyce also supplies honey to another major industry, the food industry.



Founded in: 1989

Productive capacity: 12.000 T/year

Number of employees: 20

Export markets: All of Europe, Northern Africa, Middle East and North America

Products: Flower honey (eucalyptus, lavender, etc.); Mediterranean honey (rosemary and thyme); Premium Nature honey (heather and oak); Spanish honey: flowers, mountain and forest; honey from around the world: Argentina, Uruguay, Bulgaria, Ukraine, China, etc.

Brands: Las Abejas, Bonapi and more than 500 customers private labels

Certificates: HACCP, IFS, BRC and FDA

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Panamar

Rediscovering the taste of bread

Panamar is a leading manufacturer and distributor of frozen dough with 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 offer freshly baked products at any time of day.

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

Panamar is part of the PanStar Group and has more than 1,200 employees, 200 million Euros in revenue, four plants (Girona, Albuixech, Enguera and Palma de Mallorca), 26 production lines and the capacity to warehouse more than 40,000 pallets.

Our unique production processes, technology and respect for traditional methods are joined to achieve exceptional products





Our project is based on two pillars: the people – a committed and cohesive team that provides individual and comprehensive solutions – and innovation 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 continuous improvement, fast adaptation to change and differentiation in sales channels. We have unique production processes where technology and respect for traditional methods are joined to achieve products with the exceptional organoleptic properties of flavor, aroma, odor and texture.

The installation of 60,000 m² of modern facilities at Enguera (Valencia) is notable. The new 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 grade awarded by the IFS and BRC certificates confirms this. Our advanced technology puts 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 ourselves 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: 26 production lines of bread and viennoiserie

Number of employees: 1,200

Export markets: Italy, Greece, Germany, Holland, England, Portugal, Libya, Kuwait, UAE, South Korea, Panama, Equatorial Guinea

Products: Precooked frozen bread and viennoiserie: white, rustic and special breads. Sweet and savory viennoiserie

Brands: Panamar

Certificates: Highest grade of IFS and BRC certifications

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Spices and sauces

Spices and sauces

Spanish cuisine uses a wide array of spices and sauces to enhance its dishes. Spices have been used since time immemorial in Spain to season dishes, enhance their flavor and give them color. 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 very widespread. In ancient times, magical and healing properties were attributed to some of them. Nowadays spices are used to enhance the flavor of dishes and to keep them fresh for longer.

Spain is one of the main producers of green aniseed, and the Spanish variety is considered one of the most aromatic and finest in the world. Although it is used in many dishes, in our country it is a typical ingredient in pastry and confectionery as well as in making liqueurs.

Three spices which are 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.

Saffron, the most expensive spice in existence, was known as “red gold” in ancient times because of its high price. Throughout history it has been used as a dye, a perfume and an aphrodisiac. Cleopatra already used it as a seductive

aromatic fragrance. It was the Arabs who introduced its farming to Spain in the 10th century. Spanish saffron is recognized all over the world as the finest. It is this very spice which gives paella its typical yellow color, and it is an ingredient used both in French bouillabaisse and Italian risotto. In other European countries, like Sweden or the United Kingdom, it is used for desserts.

Saffron rose (*Crocus sativus Linnaeus*) only grows in areas with baking-hot summers and cold winters. It also requires flat and dry lands. 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 due to how delicate it is, 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 don't lose their properties.

Each flower produces three 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 16th 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 19th century it was as essential an item as salt and olive oil.

Pimentón is made with red peppers that are dried to the smoke of helm oak and oak timber, and then powdered. There are three 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, where it was also introduced by the monks of the Monasterio de la Ñora. Nowadays not only is it an essential ingredient in dishes like Galician octopus, Riojan potatoes or Madrid *cocido*, but it is used as condiment and preservative of such typical cold meats as *chorizo* and *sobrasada*.

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

The role of sauces to create contrasts, soften flavors and make dishes tastier has grown more important over the past years. And although many are still prepared at home, there is an increasing number of industrial sauces which taste home made and save the consumer time and effort.

Probably the most widespread in Spain is Spanish style tomato sauce, the foundation of countless culinary

While Spanish saffron is recognized all over the world as the finest, *pimentón* (paprika) is an essential ingredient in traditional Spanish dishes

creations. Its taste varies depending on its additional ingredients (garlic, onion, vinegar, sugar, spices, etc.), and is very popular among younger consumers because of its versatility and convenience. Ketchup has also become very popular, both among children and adults, and being consumed in restaurants and at home.

Mayonnaise has its origin in Mahón, capital of the island of Menorca (Balearic Islands), according to documents dating back to the 14th century. This sauce made with egg, olive oil and lemon or vinegar, was originally made with garlic – *alioli*, another renowned Spanish sauce, is basically garlic and olive oil beaten until they emulsify. Although in the south of Europe mayonnaise is still made by hand, industrial mayonnaise is gaining ground since it keeps much longer and the taste is now comparable to home-made mayonnaise.

The 45 companies which comprise this industry have demonstrated great versatility by launching new formulas for traditional sauces and innovative products such as sweet mustards, olive oil mayonnaises, *romescu* sauces, etc.



Aliminter S.A.

Sauces & pickles solutions

Aliminter was founded in Murcia in 1996 as a sauces and pickles factory, business closely related to the important food industry in the Region of Murcia. Well from the beginning, export has been a major target for the company. More than half of its turnover today is achieved in more than 50 countries.

The company operates in Europe's developed and ripe markets as well as developing or emerging countries in Africa, Asia or Latin America. In 2001 a second production unit was opened in Morocco to supply this market and support exports.

The main added value which Aliminter offers is its wide range of products and packaging which has evolved according to the tastes and requirements of the different markets where it operates in. Apart from the ambient sauces, pickles and canned vegetables and fruits, new product categories have been launched as part of its diversification strategy: chilled sauces and the range of sweets sauces, jams, pie fillings and coatings and ice-cream toppings.

The range of Mediterranean products stands out: gazpacho, garlic mayonnaise, alioli (garlic sauce), mayoliva (olive oil mayonnaise), capers and banderillas (mixed pickles skewers), typical of Spain's rich and healthy diet.

Aliminter offers a wide range of products and packaging which has evolved according to the tastes and requirements of the different markets where it operates in





Aliminter produces in two manufacturing plants, its headquarters based in Ceutí, in the Spanish region of Murcia, with a surface of 14,000 m² and a production capacity of 55,000 T/year, and another one in Fez (Morocco), with a surface of 15,000 m² and production capacity of 18,000 T/year.

Both factories are equipped with machinery for the production and filling of fluid products of varying viscosity for both cold and hot production and different packaging. These range from single portions to industrial tanks, include jars, plastic bottles, jerry-cans and buckets, pouches as well as cans, thus covering all the needs of the different sales channels: industry, retail and food service.

Aliminter sells under its own brands – such as Bangor, Betania or Bon Appetitus – and manufactures for third parties, offering products sold under its customers' brands, as well as intermediary food products to integrate in other production processes.

A complete service is offered: identifying customers' specific needs, product development, packaging and labeling customization, supply chain, production and transport.

The research and development department is formed by a professional team which develops products according to the customers' requirements. All processes comply with the quality and safety standard regulations of the main certificates of the food industry: ISO 22000, ISO 9001 and IFS.



ALIMINTER, S.A.

Founded in: 1996

Productive capacity: 55,000 T/year

Number of employees: 70

Export markets: UAE, Qatar, Saudi Arabia, Iran, Kuwait, Singapore, China, Japan, Australia, Uruguay, Paraguay, Brazil, Mexico, Canada, Cuba, Morocco, Algeria, Tunisia, Libya, Egypt, Mali, Senegal, Burkina Faso, Ivory Coast, Cameroon, Equatorial Guinea, Gabon, Angola, Seychelles, USA and 15 European countries

Products: Ketchup, mayonnaise, mustard, gourmet sauces, ethnic sauces, pasta sauces, chilled sauces, jams and fruit preserves, honey, ice-cream toppings, fruit sauces, pie fillings and coatings, squash and granita fruit concentrate, pickles and canned fruits and vegetables

Brands: Bangor, Bon Appetitus, Betania, Chalapa River and private labels

Certificates: ISO 22000, ISO 9001, IFS

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Hijos de Salvador López

The red gold

This family-owned company, established in 1940, has long been in the business of manufacturing and packaging Pimenton 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.

Pimenton 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, and at the same time 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.

The 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 cultivated are of the species *Capsicum annum* and sub-species *Longum cerasiforme* 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 emphasizes the richness of any cuisine





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

Pimenton 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 Pimenton 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 in the La Vera microclimate and the drying process.

We strictly monitor both the cultivation of pepper and processing of paprika. In addition, the packaging process is automatic both for the plastic-lined raffia sacks as well as 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 and Twitter.



Founded in: 1940

Productive capacity: Dependant on the scarcity or abundance of raw materials

Number of employees: 4 full-time, 8 that work on the paprika production campaign and an Export Department

Export markets: The UK, Germany, Switzerland, Belgium, Sweden, Portugal, Mexico, Nicaragua, Costa Rica and the USA.

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

Brands: Las Hermanas and Los Extremeños

Certificates: ISO 9001/2008, Pimentón de La Vera Denomination of Origin Certificate, Foods from Extremadura

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Netasa

Purity and quality. Aroma and flavor

Our company NETASA, a family firm through and through, was founded in 1975. The name of our brand "La Chinata" originates from Malpartida de Plasencia (Cáceres) where the founder of our company, Florentino Oliva, came from. Three decades later, his son and grandchildren continue his exciting work, contributing little innovations which will not distort the traditional character which defines our production process.

La Chinata smoked paprika powder is a unique product in the whole world. Its smoky aroma and flavor distinguish it from any other paprika powder. It is available in three varieties, sweet, bitter-sweet and hot and is under the protection of the Pimentón de La Vera Designation of Origin (D.O.) which certifies its origin and quality.

Our smoked paprika powder's uses are very varied. On the one hand it is used as a basic spice in any household, adding color, aroma and flavor to countless recipes. A good paella or a tasty meat marinade wouldn't be the same without our product. On the other hand, it's one of the basic ingredients of typical Spanish chorizo and its derivative products.

Currently our product enjoys great international prestige. It is available in supermarkets and specialized shops in over 50 countries and is used by renowned chefs throughout the world.

La Chinata *pimentón* is a unique product in the whole world because its smoky aroma and flavor distinguishes it from any other paprika





The peppers we use to manufacture La Chinata smoked paprika powder are sourced from local farmers who treasure generations of experience. The fruit is ripe, healthy and clean at the time of harvesting in the months of October and November. The collection process is conducted by hand given the great care that this task requires.

The peppers are taken immediately to the drying racks on the farmer's very premises. The drying process is completely artisanal, carried out by burning Holm oak and oak timber. After approximately 10 days drying, the peppers are sent to our facilities.

The industrial process involved in manufacturing our smoked paprika powder begins by cleaning and grinding the peppers. They are then sent to our milling system where 8 mills grind the peppers using the friction between two granite stones. The ground peppers go through the stones until the dust reaches the correct degree of refinement.

Once this process has concluded, and after cooling, the smoked paprika powder is moved to our cold storage facilities for its perfect conservation. This allows our product, once packaged, to reach our customers with all of its sensory qualities unaltered.

This entire process takes place under the strictest quality and safety control since our company complies with international certificates ISO 9001:2008 and ISO 14001:2004 among others.

La Chinata Smoked Paprika Powder is available in numerous packages, from 70 gr tins, ideal for household use, to 5 and 25 Kg bags for industrial use.



Founded in: 1975

Productive capacity: 350 T

Number of employees: 11

Export markets: UK, USA, France, Canada, Australia, New Zealand, Germany, Italy, Sweden, Portugal

Products: Smoked paprika powder

Brands: La Chinata

Certificates: ISO 9001 and ISO 14001

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Netasa

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Solís

Spanish style tomato sauce like home made

In 1946 the founder, Juan Antonio Solís, purchased a small laboratory of diet products for the manufacture and sale of almond milk in Barcelona. This product was sold in chemists' and food stores. The decorated glass packaging immediately caused a great impact on consumers at the time.

In 1960 the company launched Solís Mayonnaise, with great commercial success and an advertising campaign that was a milestone for being one of the first brands to advertise on television. Soon after Solís, within its strategy of developing healthy and nutritious products, launched the first mass market Spanish style tomato sauce selling over 2 million units in just over 2 years, and enjoying great acceptance and a reputation for its quality. Since then the Spanish style tomato sauce established itself on the market and became a reference point in the culinary category.

The Solís factory belongs to the Nestlé Group since 1985, which allows us to benefit from latest generation production processes and stimulates quality and rigor in the purchase of raw materials and their subsequent manufacturing process.

Since Solís launched the first mass market Spanish style tomato sauce in Spain in the 60's, our brand has established itself on the market becoming a reference point in this culinary category





Our tradition of maintaining original recipes has given us the possibility to continue making Spanish style tomato sauce sauces that everybody enjoys because of their quality. This allows us to transmit tradition in our modern premises of our factory in Extremadura.

Our current factory in Miajadas started functioning in 1976. It is located in the region of Las Vegas del Guadiana (Extremadura), an area where tomato is the main horticultural crop thanks to its perfect adaptation both to the climate conditions and to the availability of water for farming. This gives us easy access to raw materials that are just ripe and whose color, sweetness, texture and flavor are ideal for making the best sauces. During the purchasing process from local farmers we take great care in the application of farming practices that yield high quality specimen using farming methods that are respectful with the environment.

These tomatoes, along with the rest of ingredients which are 100% natural, are cooked according to the original recipe to obtain the desired flavor and, after a sterilization process which guarantees food safety, are packaged in glass jars, tins or cartons.

The quality process we have in place guarantees the unique taste of our sauces thanks to the control we have over the entire process starting with the harvest in the field all the way to the finished product.

Founded in: 1946

Productive capacity: 60,000 T

Number of employees: 80

Export markets: Europe, America and Asia

Products: Basic Spanish style tomato sauce, added value Spanish style tomato sauce, pasta sauces, sauces for the professional channel

Brands: Solís, Buitoni

Certificates: ISO 22001 (Food Safety), ISO 9001 (Quality), ISO 14001 (Environmental Management), OHSAS 18001 (Health and Safety in the workplace) and internal requirement NQMS (Nestlé Quality Management System), Halal and Kosher certificates

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Verdú Cantó Saffron Spain

Saffron experts since 1890

Verdú Cantó Saffron Spain was founded in the city of Novelda (Alicante) by D. José Verdú Cantó. In those days don José rode his horse to personally select the best saffron in the Mancha region. This way he was able to select the best batches that were then distributed by his company all over the world.

Almost 125 years have gone past and today we can proudly say that the same basic business principles don José established are still alive: obtaining the best batches of saffron straight from the farmers, maintaining the quality and purity guarantees of the saffron we sell, developing of a broad range of innovative presentations adapted to the needs of the consumer and marketing our product all over the world, building renowned and prestigious brands.

This has allowed us to become one of the leading companies in our field worldwide and to market our products in over 40 countries.

Our product range has extended to other spices and condiments such as pimentón (paprika), blends of spices or salts in grinders and botanical cocktail ingredients, with the same business principles that brought us success in marketing saffron, specializing and delving deeper in each product and application.

We are world leaders in the saffron sector and market our products in over 40 countries





At Verdú Cantó Saffron Spain we have pioneered the strictest analytical controls starting with the arrival of the prime material until the production's culmination. To this end, all development procedures are aimed at obtaining results that improve the quality of our product, differentiating us from the rest of the competition.

On the other hand, we give special attention to packaging design adapting it to our clients' preferences and adding a personal touch. Thus we adapt our formats to the different segments to which we market, be it the industrial market (loose), bulk distribution, specialized shops or delicatessen, ethnic market, promotional products or the catering and restaurant industry.

Our current strategy leads us to concentrate on a specialized top quality segment, with innovative and distinguished products. Innovation has been a key element in positioning us as the first brand of cocktail spices in Spain, and starting to become a reference point beyond Spain both for professionals and for cocktail enthusiasts. We have succeeded in moving spices from their usual location on the shelf to the liquor shelf bringing an exotic and unusual product closer to a broader spectrum of the public.



Founded in: 1890

Productive capacity: 200 T

Number of employees: 30

Export markets: UE, Switzerland, Malta, USA, Canada, India, Australia, Taiwan, South Africa, Iceland, Mauritius, Reunion, Saudi Arabia, Bahrain, UAE, Kuwait, Oman, Qatar, Philippines, Hong-Kong, Singapore, Argentina, Mexico, Brazil and Uruguay

Products: Saffron, pimentón (paprika), blends of spices, salts and cocktail botanical ingredients

Brands: Pote, Toque Especial, Zafferania, Syren, San Román

Certificates: -

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Dairy products, nuts & dried fruit



Dairy products, nuts & dried fruit

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 was considered the nourishment par excellence, source of life and strength. The Assyrians were the ones who perfected manufacturing dairy products, obtaining far more refined dairy products.

Spain, being on the pathway between Europe and Africa, suffered numerous invasions during its 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 a very varied dairy sector. The result is that nowadays in Spain one can find the most recent innovations and developments to enhance the fruit of the most ancestral traditions.

The cheese industry in Spain started taking off halfway through the 20th century. Traditional cheese manufacturers became small industries, maintaining that unique artisan touch nobody else could give to their cheeses. These gave way to medium and large companies, where the production

techniques avail themselves of the latest developments 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 varieties, 26 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 one beyond our borders is Manchego. But 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 2013, 11 Spanish cheeses were awarded SuperGold, ranking among the top 58 best in the world. This isn't only the result of centuries of labor, but 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 some 6.2 million tons of cow's milk, about 600,000 tons of sheep's milk and 500,000 tons of goat's milk. Of the 380,000 tons of dairy products Spain exports, for a value of euros 690 Mill., 42,000 tons are cheeses whose value reaches euros 218 Mill.

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.

Apart from dairy products, snacks and nuts are a fun food option. A truly Spanish pastime, practiced at all ages, is peeling and eating sunflower seeds, a very healthy snack which is usually salted and toasted. Another typical Spanish snack is quince jelly. This fruit, brought to Spain by the Greeks and Romans, became very popular in the 12th century at the hands of the Sephardic Jews who used it extensively in their cuisine. Nowadays, quince jelly is a true classic of Spanish gastronomy. It is made just like ordinary jams (the same proportion of fruit to sugar), but its finished texture is solid, so it can be cut with a knife and served with cheese, both fresh and cured, or with nuts, etc.

An original 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 palate of the Spaniards.

Sales of nuts, dried fruit and snacks in Spain reached euros 1,995 Mill. in 2013. Almonds, nuts, hazelnuts, pine nuts and peanuts are top sellers in Spain, with a market share of 37.2%. Other snacks (potato chips, puff chips, tortilla chips, etc.) don't lag far behind. In recent years a number of new of formats and flavors have been launched on the market. As well as imported flavors such as ketchup and cheddar cheese, many Spanish ones such as Serrano ham or garlic have been added.

The majority of manufacturers of these products (22%) reside in the region of Valencia, since it is a great producer of almonds. It is followed in terms of importance by Catalonia, Andalucia and Castile and León. In 2012, 110 companies were grossing over euros 1 Mill. And although the top 5 accounted for 41% of the market, a huge number of smaller companies – primarily family businesses whose activity is confined to their town or province – manufacture handmade potato chips, caramelized almonds, toasted sunflower seeds etc.



Almendras Llopis

True to our origins since 1923

In our land, on the Eastern coast of Spain, one can still see old almond trees, dark and twisted, blossoming in the mid of winter and covered in flowers long before any other plant has even sprouted its first shoots.

Almond trees have lived among us for centuries. And we have learnt to love them. They are part of our culture, of our countryside and of our character. This love and knowledge of almonds has been passed on in our company for generations.

Nowadays almonds are a global consumer product. Consumers all around the world demand different varieties of almonds processed in a personalized fashion to satisfy different cultural needs.

The food industry demands sustainable quality almonds as an ideal ingredient in manufacturing tasty, healthy and attractive products. Apart from its use in cuisine, where it is used in a number of dishes and sauces, its delicate aroma and crunchy texture is irreplaceable in ice creams, confectionery, creams, cakes, biscuits, etc.

Our dedication to almonds comes from our culture and our family, and we offer our almonds with this love, giving the food industry a healthy and nutritious ingredient.

We process almonds as a fundamental quality ingredient for the food industry, giving it whatever format the industry might require





It was over 80 years ago that D. Vicente Llopis Espinos started his business of shelled Spanish almonds in Alicante. Since then the Llopis family, now in its third generation, has worked in the almond business staying true to its origins.

The 90's were years of technological development and the introduction of new lines in the processing plant. Our strategy revolves around the added value of our products, diversifying the ways in which we process almonds and constantly strive for excellence and good work.

Today the Llopis almond factory in San Vicente del Raspeig (Alicante) is one of the most automated in Europe. There we process almonds as a fundamental quality ingredient for the food industry, giving it whatever format the industry might require: whole, blanched, toasted, sliced, sliced, slivered, ground, in paste or in praline.

We export our products to many demanding markets all over the world supplying them with almonds which pass the strictest quality controls, armed with the confidence of having the BRC (Level A) certificate, the world standard of food safety, as well as other specific certificates (Halal and Kosher) for certain markets.

Our strategy for the future consists in the vertical development of our organization. We own our own fields in the Iberian Peninsula and have cooperation agreements with farmers with whom we work from the very beginning starting with the development of their farms. Thus we not only cooperate in the development and sustainability of our raw material, but also contribute in the improvement and benefit of their fields as well as ensuring the sale of their crops.



Founded in: 1974

Productive capacity: -

Number of employees: -

Export markets: EU, all Eastern countries

Products: Natural whole almonds blanched, whole almonds sliced, slivered and diced blanched almonds, blanched almond meal, roasted whole almonds, roasted blanched sliced almonds, slivered and diced almonds, roasted almond paste, almond praline

Brands: Llopis

Certificates: ISO, BRC, Halal, Kosher

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Capsa Food

Feeding families and caring for their wellbeing

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, has connected with Spanish consumers the most for decades. It is a brand that evokes honesty, naturalness, origin and closeness. It has been more than 40 years that this company has been devoted to doing what it does best: caring for, nurturing and ensuring the best flavor and quality milk to feed families with natural and healthy products.

The milk's origin speaks to us about its quality, and that starts with the meadows. Asturias has one of the greenest and most pristine landscapes; and its pastures are characterized by having a much more varied vegetation, as result the converging weather patterns, which is more nutritious and rich with vitamins and minerals.

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

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





CAPSA Food has 7 factories spread over 6 Spanish provinces, with the capacity to process more than 900 million liters of milk annually.

Central Lechera Asturiana SAT, CAPSA Food's majority shareholder, is a cooperative of farmers that are also the company's main suppliers. The cooperative provides them 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 flavor.

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 Tetrapak and Combibloc.

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".

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



Founded in: 1967

Productive capacity: 900 Mill. Kg

Number of employees: 1,294

Export markets: EU, China, USA, Senegal, Tunisia, South Korea, Dominican Republic, Libya, Morocco, Mauritania, Angola

Products: UHT milk, enriched milk, powdered milk, cream, milkshakes, butter, yoghurt and desserts, commercial dairy ingredients

Brands: Central Lechera Asturiana, Larsa, Ato, Vega de Oro, Innova

Certificates: European Foundation for Quality Management (EFQM) Seal of Excellence +500, 2013 Ibero-American Quality Award, Quality Certificate ISO: 9001, Environment Certificate ISO: 14001, OHSAS 17001 Conservation Certificate, RDI Certificate 16002

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Facundo

Launching new ideas unlike those of our competitors

Facundo was created in 1944 in Villada (Palencia) as a family business devoted to the production of high quality nuts. In the back room of our very first shop we started preparing our products, always focused on the values that have shaped our path ever since: honesty, loyalty and solidarity.

Our founders shared the same work philosophy: to develop new ideas that would be different from those of their competitors. Following this maxim, Facundo became a pioneer in roasting sunflower seeds using a salt-water system, in using polyethylene in packaging and in having the very first automatic packing machine in the sector.

We started producing snacks in the 1970's. As a result, we launched popcorn, Rulitos, cheese balls and Chaskis - crunchy corn rings with a unique natural flavor. Afterwards we added new flavors to our range, creating cheese, barbeque and *ranchero* flavored Chaskis, all of which became very popular among our customers.

Facundo is still a family-owned company with traditional values, now in its third generation, who maintains the strength and drive to keep growing and innovating.

We have recently launched our customer loyalty website (www.mundofacundo.com), as well as joined the social media to promote our brand. Being able to respond to our

Facundo's main mission is to be the brand of choice in nuts and snacks preferred by consumers for its quality, values and ability to communicate with them





customers' enquiries and suggestions has allowed us to get closer to and to know them better.

Facundo aims to be the brand of choice in nuts and snacks. We strive to achieve this by being a model of quality, true to our values and maintaining fluid communication with our consumers.

Our commitment to people, the environment and society has directly contributed to consolidating our leadership.

In order to stay ahead we look to our R+D department for growth. The following are examples of this thinking: installation of the first motor in our roasters (1950); the purchase of the first packing machine (1957); roasting sunflower seeds using the salt-water system (1958); the use of polyethylene in packaging (1962); the use of inert gas to extend the shelf-life of our products (1985); installation of pneumatic transport system (2002); the vacuum fryer (2004); and, ultimately, our customer loyalty platform - "Mundo Facundo" - and including promotional gifts in our products.

Facundo adapts to market trends by developing a large variety of value added products. We stand out from the crowd by offering value-for-money products and responding to the current demand for healthy snacks with a range of products without added salt, gluten-free, organic and natural. Our company is focused on adapting to the rapid changes of modern life and the growing social awareness for physical and mental wellbeing, as more and more consumers are aware of the benefits of a healthy and balanced diet.



Founded in: 1944

Productive capacity: 7.000 T

Number of employees: 140

Export markets: Switzerland, Poland, USA, Germany, Malta, Chile, Ireland

Products: Sunflower seeds, nuts, fried corn, snacks made with corn and mixed nuts

Brands: Facundo, Chaskis, CornU2, Contraste, Rings Facundo, Bastos, Booming, Fritos Facundo and Facundo Jalapeños

Certificates: ISO 9001:2008, Ecoembes

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Innolact

Cream cheese specialists

Innolact was originated in 2006 at the *Aula de Productos Lácteos*, a Training and Research Centre of the University of Santiago de Compostela, and started operations in 2008. It is the first dairy firm to be qualified as technological based dairy company manufacturing top quality cream cheeses and Mascarpone under the brand name of Quescrem.

Quescrem products' distinctive qualities are their creamy texture and their natural and intense flavors, resulting from the use of a different local ingredient: buttermilk. At Innolact we have given this product, derived from butter manufacture, the value it deserves since it offers great nutritional and functional advantages.

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

Backed by cutting edge technology and totally automated processes, Innolact offers shelf life and quality as guaranteed by the IFS since 2009.

Innolact is the first dairy firm to be qualified as technological based dairy company manufacturing top quality cream cheeses and Mascarpone





Quescrem products currently offer a wide spectrum of flavors. We have the "Spanish flavors" Premium Range in 150 g tub with 5 varieties in which we combine our Cream Cheese with Chorizo, Manzanilla olives, Wakame seaweed (*Undaria pinnatifida*), 60% Protected Denomination of Origin Torta del Casar cheese (the most renowned of Spanish cheeses made with sheep milk and vegetable curd) and 50% Protected Denomination of Origin San Simón da Costa cheese (a unique cheese made with cow milk and smoked rind).

Another interesting range is the 200 g tub we offer with its sophisticated and modern design. It is available in the following varieties: Natural, Light, Garlic and Herbs and Blue Cheese. Those who are lactose-intolerant can also enjoy 0% lactose Natural Quescrem recommended by ADILAC (Lactose-Intolerant Association). We complete the range with Organic Natural Bio, made with locally sourced organic milk, 100% organic ingredients and certified by CRAEGA (The Galicia Organic Food Production regulatory body).

Within our Quescrem range, our 250 g Mascarpone tub has been awarded the maximum rating (3 stars) by the International Taste & Quality Institute jury.

And to offer the little ones healthy and delicious snacks in between meals, we have given our cheeses a sweet touch with our ChocoBó range: cream cheese with chocolate and hazelnuts and cream cheese with white chocolate in 350 g tub.

All our products are also available in foodservice and industrial packages.

Founded in: 2006

Productive capacity: 3,000 T

Number of employees: 32

Export markets: Portugal, France, Italy, Denmark, Greece, Malta, Sweden, UAE, Saudi Arabia, Israel, Lebanon, Jordan, India, China, Hong Kong, Japan, Korea, Taiwan, Chile, Uruguay, Mexico, Dominican Republic, Cuba

Products: Cream cheeses and a broad variety of products ranging from standard to Premium products of Spanish origin as well as our ChocoBó range for the children's market with hazelnut chocolate and white chocolate. We also manufacture a high quality Mascarpone with extended shelf-life

Brands: Quescrem y ChocoBó

Certificates: IFS

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Mantequerías Arias

A new experience in the kitchen

Mantequerías Arias was born in 1848, in Corias de Pravia (Asturias); a small shop devoted to making artisanal butter opened by Antonio Arias. Cheese production would be added in 1918 and shortly afterwards the company would become an industrial business.

The constant evolution and growth of Arias drew the attention of the French multinational Soporind Bongrain, who acquired it in 1978. After that, Mantequerías Arias grew stronger in Spain, having acquired Boffard in Valladolid and Unión Quesera (Casa del Campo) in Albacete. In 2003, Angulo was purchased - with factories in Burgos and Ronda - and in 2009 both companies merged.

Arias is a leading producer and marketer of dairy products, with over 165 years of experience. The company focuses its development on customer satisfaction through strong and well known brands, the quality of its products and continuous innovation.

Arias is a leading producer and marketer of dairy products, with over 165 years of experience





Mantequerías Arias currently has a workforce of 550 people, distributed amongst the company's six work centres, and is part of Bongrain Group, the world's second largest cheese producer, with over 120 subsidiaries, present in 30 countries and four continents, and some 20,770 collaborating companies around the world.

Arias has five factories in Spain (Vegalencia-Asturias, Valladolid, Albacete, Ronda and Burgos) devoted to producing dairy products such as butter, cottage cheese, cream cheese, pressed-curd cheeses, and other specialities, which all together make one of the most varied product ranges available in Spain. Additionally, Arias markets specialty cheeses from the Bongrain Group.

Exporting high quality, value added products is a means for growth and business development for Arias. The company is currently exporting its products to other E.U. countries, the US, Japan, Saudi Arabia, Kuwait, Mexico, Morocco, Serbia, Macedonia, Bosnia and Angola.

By focusing on innovation Arias has launched an average of six new products per year for the past 20 years, which translates to 81 new products. Today Arias concentrates its innovation activity in four facilities where its work uses market research, consumer preference analysis and product shelf life research.

Arias's commitment to quality has led the company to be one of the first companies of its kind to have its production processes certified by the international quality regulations of ISO 9000 and ISO 22000.



Founded in: 1848

Productive capacity: 25,000 T

Number of employees: 550

Export markets: Germany, France, UK, Portugal, Japan, Romania, Denmark, Sweden, Saudi Arabia, Kuwait, Mexico, Morocco, Hungary, Serbia, Macedonia, Bosnia, Angola, USA and soon, Poland

Products: Butter, fresh cheese, spreadable cheese, soft uncured cheese, cured and semi-cured cheese, ripened goat cheese, feta-style cheese, cakes and other desserts, French specialties, etc.

Brands: Arias, Burgo de Arias, Angulo, Boffard, Casa del Campo, Flor de Ronda, San Millán, La Cabaña, and other company brands including Caprice de Dieux and Coeur de Lion

Certificates: ISO 9000, ISO 22000, British Retail Consortium (BRC) for Abacete factory, International Food Standard (IFS) for Albacete factory, Vegalencia factory and for goat cheese log at Ronda factory

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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 later 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 reference point 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 during all of its processes, without ever losing the care of 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 client 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, UK, Belgium, Holland, Portugal, Italy, Ireland, Sweden, Australia, Hong Kong, China, Philippines and Japan

Products: Manchego cheese, cheese blend, goat cheese, sheep cheese

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

Certificates: IFS, BRC

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Quorum Internacional

Specialists in traditional Spanish cheeses and accompaniments



Twenty years ago, Thomas and María moved to Spain after living 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. Hence, they 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 had 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 Internacional 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, like the World Cheese Awards have awarded the quality of our products the highest ratings.

Our accompaniments line includes a range of traditional Spanish products that are part of the great Spanish culinary tradition and perfect pairing to cheese. Among them, our nutbreads, a mix of Spanish figs and almonds, stand out, as well as other combinations of flavorful and nicely textured

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





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

Quorum works with more than 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 comprehensive and customized service in international logistics, sanitary documentation and customs procedures and we adapt our labels to meet local market requirements.

Some of our cheeses have received awards in national and international competitions such as 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), Gold and Silver medals at the World Cheese Awards.

Our Manchego Gran Valle dairy has been in business for more than three generations and is one of the few cheese factories in La Mancha that produces sheep's milk cheese exclusively and that 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: Varies depending on the cheese factory. Our Manchego cheese factory produces around 10 T/day

Number of employees: Quorum Internacional has 8 employees

Export markets: USA, Germany, United Kingdom, Ireland, Australia, Canada, Japan, Holland, Dominican Republic, Mexico, Singapore, Greece, China, Latvia, Poland, Denmark, Sweden, Belgium, New Zealand, Austria, Italy, Finland, Lebanon

Products: Cheese (Manchego, Murcia al Vino, Ibérico, and artisanal cheeses from all over the country) and accompaniments (nut bread, Marcona almonds, sweet flatbread, breadsticks, quince paste)

Brands: Gran Valle and Bonvallis

Certificates: BRC, IFS, ISO 9001, ISO 22000

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Alcoholic and non-alcoholic beverages

Alcoholic and non-alcoholic beverages

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. Spain is the 3rd wine producer worldwide, and the second in terms of vine-growing, land and export volume.

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

The Spanish Civil War (1936-39) and the Second World War caused the decline of the sector, which did not fully recover until the last quarter of the 20th century. Since then the sophistication and modernization of production methods have increased the quality of Spanish wines so considerably that they are now amongst the best in the world, as the numerous international awards testify.

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 with the adequate rainfall and the great variety in terrain, favor the wine harvest and guarantee excellent quality grapes.

Spain boasts a broad range of native grapes (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 the current year's, Crianzas (2 years old, 6 months of which aged in caskets); Reservas (3 years old, 1 year of which aged in caskets); and Gran Reserva (5 years old, 1 and a half years of which aged in caskets).

Depending on their location and the degree of protection (the legislation and controls they must comply with), they are divided into: Table Wines (not subject to any requirement); Vinos de la Tierra (from a specific region) and Vinos de Calidad con Indicación Geográfica (V.C.) which come from a specific regions, are made with local grapes and aged locally. Spain has 69 Designations of Origin (D.O.), such as Ribera del Duero, Penedés, Albariño, La Mancha or Toro. Their regulations are very strict. There are currently only 2 Qualified Designations of Origin (D.O.Ca.): Rioja and Priorat. Their regulations are even tougher and their quality control stricter. Finally come the Vinos de Pago (V.P.), with unique qualities that set them apart from all other wines.

Spain is also well known for its magnificent cava - sparkling wines made using the *méthode champenoise* - and for its fortified wines, whose proof ranges from 15° to 23°, among which Jerez wine stands out. 4,000 wineries - mostly small and backed by primarily Spanish capital - produced 29 Mill. hl in 2013.

Even though cider is produced all over Spain, because of the peculiarities of its terrain and its damp climate, Asturias (in the North of Spain), is the only region where apple trees prosper instead of vines. There are documents testifying that its 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 related 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 oxygenated and froths. Very little is served and it is drunk in one sip. Natural cider is a fresh, acidic and slightly sparkling beverage.

Beer is one of Spain's most popular drinks. In 2012 the average consumption of beer per capita was 47,5 l, one of the EU's most moderate. Unlike the North of Europe, beer in

Spain is fundamentally drunk with friends and family, always with food. 97% of Spaniards prefer beer with their tapas.

Spain produced 33 Mill. hl of beer in 2012, positioning it as the 4th producer in the EU and the 10th worldwide. However we are the number 1 producer and consumer of alcohol free beer in the EU. The extraordinary growth of our exports (81% since 2009) is proof of our beer's great quality. Of the over 100 countries to which we export, the main destinations are Equatorial Guinea, Portugal and Australia.

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 by the earth, 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 4th mineral water producer in the EU and the 3rd consumer (136 liters per capita). The sector consists of about 100 companies dotted around the entire country bottling over 5,000 Mill. liters, employing 5,000 people and grossing euros 900 Mill. a year. 96% of production is natural mineral waters, of which 96% is still and the remaining 4% is carbonated.



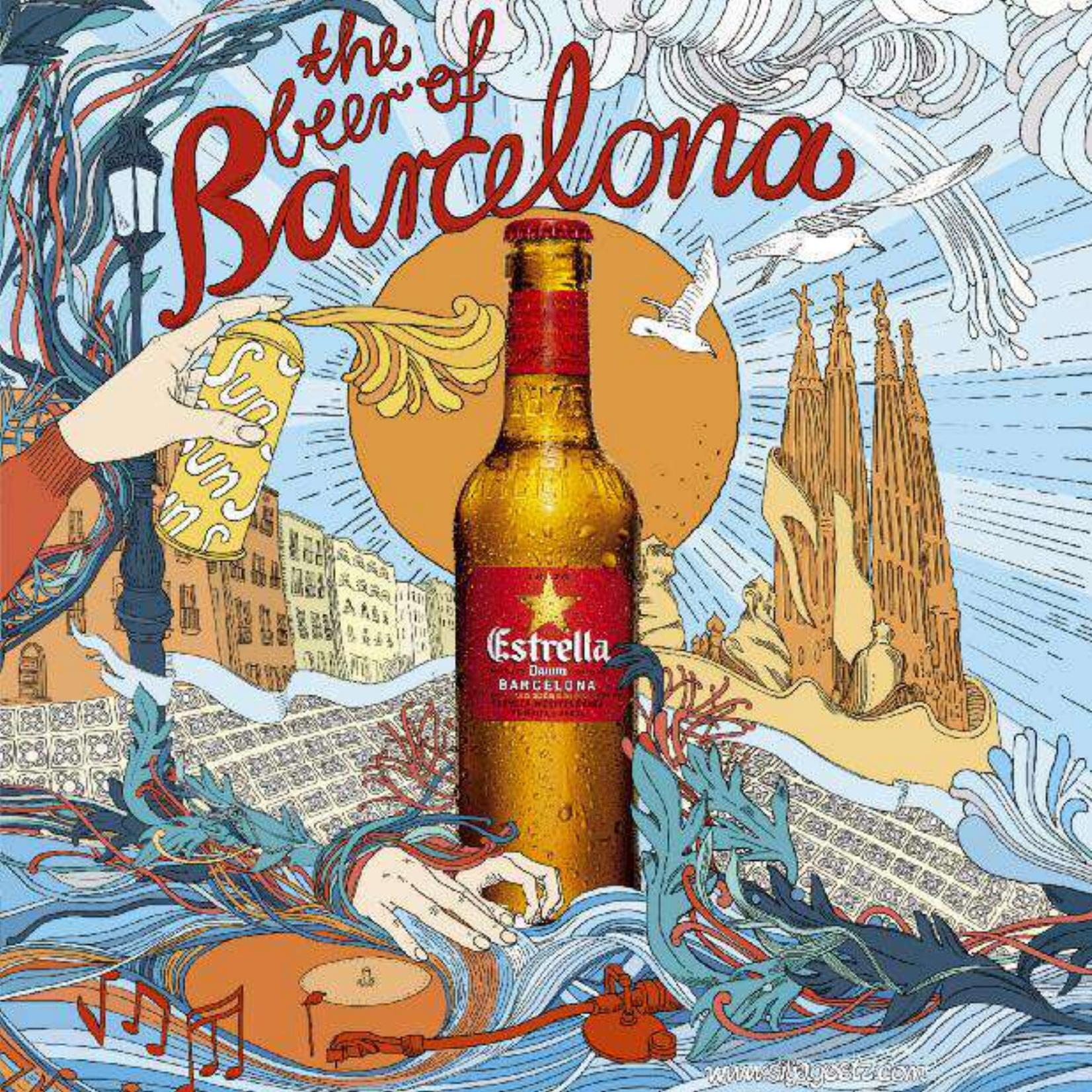
Estrella Damm

The Mediterranean beer

1 40 years ago, a young August K. Damm and his wife Melanie emigrated from Alsace (France) to escape the Franco-Prussian war. Their journey took them to the Mediterranean to realize their dreams of doing what they did best: brewing beer. In 1876 they established their own brewery and they crafted a distinctive and evolved beer, suitable for warmer climates, very different to existing central European beers: the Mediterranean Lager.

To this day, Estrella Damm is brewed using the original 1876 recipe and the best Mediterranean ingredients: barley malt, rice and hops. The quality of our ingredients is of the utmost importance and, as such, we work closely with local farmers, supplying them with our carefully selected pure seed varieties. Our yeast is unique and it is stored under high security measures. Our malt is processed to the strictest standards in our own malt-house, La Moravia.

Brewed in Barcelona with
Mediterranean ingredients
since 1876





It takes a minimum of 3 weeks for Estrella Damm to complete the fermentation and production process. This level of care and attention has been recognized through the acclaim and numerous awards won across the globe.

Issues such as Oxidation and Microbiological Contamination, the beer worst enemy, are overcome by using the most modern packaging technology. Our brown bottle protects against ultraviolet radiation. This, combined with appropriate cold storage, ensures that the beer can be enjoyed as it was intended “*Mediterráneamente*”.

Estrella Damm is the leading beer in Barcelona and is the official beer of FCBarcelona.

One of our brand ambassadors is Ferran Adrià (the world's most award-winning chef) who has developed new brews such as Inedit Damm (specifically created to accompany food) in cooperation with the Damm's brewmasters.

Estrella Damm is also the sponsor of the Sonar Music Festival, the leading progressive music festival in the world.



Founded in: 1876

Productive capacity: 6 Mill. Hl /year

Number of employees: 3,000

Export markets: 67, including, the EU, Northern and Western Africa, Argentina, Armenia, Australia, Brazil, Canada, Chile, China, South Korea, El Salvador, Europe, USA, Georgia, H.K., India, Iraq, Iran, Israel, Japan, Libya, Macau, Morocco, Mexico, NZ, Panama, Peru, Puerto Rico, Qatar, the Dominican Republic, Russia, Sao Tome and Principe, Singapore, Thailand, Taiwan, Uruguay

Products: Beer

Brands: Estrella Damm, Daura Damm, Inedit

Certificates: -

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Estrella Galicia

The beer you should not miss

After more than 100 years of history, Corporación Hijos de Rivera is still an independent company, with 100% Spanish and family-based capital, currently being managed by the family's fourth generation. With a wide product portfolio which includes beer, mineral water, wine, cider, sangria and liqueurs, we face the future backed by outstanding growth which has meant a doubling of turnover in the past 5 years. In the past 20 years growth has been well above the sector's average.

But the origin of it all is beer. Since 1906 our project has developed beyond our best-known brand, Estrella Galicia, incorporating new products like the 1906 Reserva Especial or Estrella Galicia 0,0 and a range of beers that are recognized for their quality and high standard.

Today we are a consolidated, prestigious national operator with a clear international calling. Our products are present throughout Spain and in over 30 countries around the world, with a great response from consumers. Our brands have become solidly positioned in the Spanish market, and have expanded to destinations that range from Brazil to Australia, China, Russia, the Philippines, and the USA, among others.

Our company has a high level activity in the food and drink sector, not only as a brewery but also covering distribution and logistics, the complete development of catering premises, or product personalization.

Our products are present throughout Spain and in over 30 countries around the world, with a great response from consumers.





In 1906, Nobel Prize winner, Santiago Ramón y Cajal, certified the excellent quality and properties of the water in Cabreiroá, leading to the establishment of a company which would become part of the group in the 1990's. Since then, the company has revolutionized the mineral water market in its search for an avant-garde style, but ensuring meticulous care in the selection and care of the spring from where the products originate. The acquisition of Agua de Cuevas completes the company's mineral water supply in its aim to improve services to the client via an improved and diverse product portfolio.

Commitment to innovation in all areas is the engine that fires Custom Drinks. This company produces cider, responding to the latest market trends to products and developing made-to-measure concepts to serve the needs of each individual client. This area of the company is extremely dynamic, keeping ahead of the times via an agile and flexible strategy.

Ponte da Boga, our winery, is set in the spectacular setting of Ribeira Sacra. In recent years it has carried out detailed research, recovering indigenous varieties that produce very special wines and that have received international recognition for their quality and originality. The care and dedication required by the cultivation of the roman-style terraced vines that mark the banks of the Sil River is commonly known as "heroic viticulture".

Our variety of products, expansion and consolidation in new markets, and our very marked sense of service to the client, call for a continuous improvement in our activities, always aiming to exceed expectations. All of this while maintaining our company's most outstanding characteristic: quality and a firm commitment to innovation, key elements for the future.

Estrella Galicia

Founded in: 1906

Productive capacity: 200 Mill. liters

Number of employees: 700

Export markets: Over 30 countries worldwide, with subsidiaries in Brazil, China, Japan, Philippines and the USA

Products: Beer, light beer, Pilsen beer, shandy, alcohol-free beer, mineral water, wine with Ribeira Sacra Designation of Origin, cider and liquors

Brands: Beer: Estrella Galicia Especial, 1906 Reserva Especial, 1906 Red Vintage, Estrella Galicia 0,0, Estrella Galicia Pilsen, Estrella Galicia Light, Shandy Estrella Galicia; Mineral water: Cabreiroá, Magma de Cabreiroá and Agua de Cuevas; Wine: Mencía, Blanco de Blancos, Expresión Histórica, Alais, Bancales Olvidados and Capricho de Merenzao; Cider: Maeloc; Liquors: Hijos de Rivera and Quenza

Certificates: ISO 9001/14001/22000 OHSAS 18001

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Félix Solís

Extending wine culture

The company's history dates back to the decade of the 1950's. Its founder D. Félix Solís Fernández – father of the current owners –, seeing the interesting business opportunities opening up to the region's wine business, moved to Valdepeñas where he bought a winery. Since then the company has experienced uninterrupted growth without losing neither its origins nor its family character.

Currently Félix Solís Avantis is one of the major exporters of Spanish designation wine. It is based in Valdepeñas from where logistics, common services and marketing of the group's brands are managed.

The two wineries that comprise the group are Félix Solís S.L. and Pagos del Rey S.L. whilst the designations under which we produce our wines are: Valdepeñas, La Mancha, Rioja, Ribera del Duero, Rueda and Toro. We also produce wines from Tierra de Castilla, generic wines, grape juice and sangrias. We market all these products in over 100 countries thanks to a significant commercial network with branches all over the world.

Among the keys that have brought the company its success are the determination to offer the best possible service, the excellent value for money of the products and the diversification to adapt to the needs of national and international clients.

Félix Solís owns the biggest automatic temperature-controlled warehouse in Europe exclusively devoted to wine, with a storage capacity of 45,000 pallets





Félix Solís Avantis combines the traditional production of its wines with the use of the latest technology. This allows to obtain and guarantee the highest quality standards of the final product and the utmost efficiency in all production processes.

The company markets over 250 Mill. bottles a year and is present in over 100 countries. Our 8 international delegations are in the UK, USA, Mexico, Germany, France, Czech Republic, Japan and China.

The primary winery, based in Valdepeñas, boasts surface of 120,000 m², a bottling plant with 14 active lines and an overall production capacity of 150,000 units/hour. The company owns the biggest automatic temperature-controlled warehouse in Europe exclusively devoted to wine, with a storage capacity of 45,000 pallets. The cellar has a significant depot of oak barrels where wines destined to become crianza, reserva and gran reserva are aged. Its capacity is over 11 Mill. liters, while its storage capacity is approximately 200,000 Mill. liters. The cellar's computer system allows complete tracing control - starting from the raw material and all phases of its production process until it reaches the final consumer.

All our premises are equipped with the latest technology and comply with international quality regulations ISO, BRC and IFS. Our laboratories conduct exhaustive analysis of the wines and of everything that comes into contact with them on a daily basis as well as conducting microbiological analyses and all kind of exhaustive quality control procedures.



Founded in: 1952

Productive capacity: 250 Mill. liters

Number of employees: 450

Export markets: Over 100 countries in all continents, Western Europe being the destination of over half of the exports

Products: White, rosé and red wines

Brands: Viña Albali, Los Molinos, Peñasol, Altos de Tamarón, Condado de Oriza, Blume, other

Certificates: ISO, IFS, BRC

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Grupo el Gaitero (Valle, Ballina y Fernández, S.A.)

Famous Worldwide

Valle, Ballina y Fernández was born in the 19th century, at a time when many Asturians emigrated to America in search of a better life and future. During this long journey cider could easily spoil, so in order to keep all of its properties intact, the champagne method was used.

Thanks to this process, Sidra El Gaitero became the link between Asturians living in America and Spain. Sidra El Gaitero has grown as an international brand intent on taking the Asturian spirit to many countries. Today our products can be found in a variety of countries from Norway to China to the Dominican Republic.

Although we still maintain our original cellars, our equipment has evolved with new technologies and innovations which allow us to create new products and brands. Opening a bottle of Sidra el Gaitero is always an invitation to celebrate.

The traditional ciders (El Gaitero) are the oldest and most recognisable products of our mill, which are linked to the image of our company. The production process, a great innovation back then, has changed very little.

In the past cider was only consumed where it was produced because once it left the area, it would lose its qualities. At the end of the 19th century El Gaitero started to produce its

In order to produce excellent ciders our apple orchards are planted in such a way that varieties are easily identified, thus obtaining a great cider that can be reproduced time and time again





ciders with high quality ingredients so they could be consumed anywhere in the world.

Our company is constantly developing new production techniques, although not all are applicable to cider. Only those products that meet our quality standards enter the production process. The quality of Sidras Técnicas (Pomarina), for example, is due to varietal selection, production techniques, the addition of yeasts, etc.

Pomarina is an original concept that envisions the cider starting with the apple on the tree. Different apple varieties are planted randomly in traditional Asturian orchards, making assortment mixture possible during harvest. The downside is that, when an exceptionally good cider is made, it is virtually impossible to reproduce the exact same cider again.

In order to produce excellent ciders we have planted new apple orchards where varietals are easily identified. This way we can obtain a great cider and we are able to reproduce it time and time again. We produce two ciders based on this concept: Granvas and Filtered Natural Cider.

During the last phase of fermentation, Granvas is pressurised to better integrate its bubbles. Its color is clean golden and shiny, with fine and abundant bubbles. Intense on the nose, with an explosion of primary aromas Intense in the mouth, giving way to hints of fruit and a long and refined finish.

We have tried Filtered Natural Cider to meet the expectations of the traditional consumer of natural cider. Technically more advanced, it can be consumed without needing the traditional high pour. Clean, golden and shiny in



Founded in: 1890

Productive capacity: 30,000 bottles /hour

Number of employees: 62

Export markets: USA, Argentina, Dominican Republic, England, Sweden, Andorra, Panama, Norway, Mexico, Germany, Venezuela, Australia, Colombia, China

Products: Cider, natural cider, PDO Asturias cider, apple paste, apple jelly, apple jam, apple juice

Brands: El Gaitero, Pomarina

Certificates: ISO 9001

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color, its bubbles fade in the glass giving way to a beautiful tear f. Strong and fruity on the nose, with a dominance of apple and citrus. It feels in the mouth like a needle of very fine and integrated bubbles that lend freshness. Its slight bitterness makes it a very original cider.



Sant Aniol Mineral Water

Volcanic purity

5 5 meters deep, surrounded by 600 hectares of virgin land in the Llémèna 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 unequalled degree of purity, something that has been ratified by different 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 in European countries with our main markets being as far flung as Japan, The United States, and recently, Australia or Singapore.

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 noting 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 H₂O.

Sant
Aniol
agua mineral
natural

Founded in: 1993

Productive capacity: 60 Mill. bottles a year

Number of employees: 20

Export markets: Japan, USA, Australia, Singapore, Germany, Netherlands, Belgium and France

Products: Still Natural Mineral Water and Carbonated Natural Mineral Water

Brands: Sant Aniol

Certificates: CSOR (Oliver Rodés)

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Sidra Mayador

The inventor of cider was a humble apple crusher



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: acid, 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 by a method called *escanciado*: holding the bottle at a certain height and pouring a string of liquid in such a way that upon hitting the glass the cider breaks up and is oxygenated. 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 cleaning 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 crushes the apples with a *mayu*, a type of club, to make the juice that, once fermented, will become cider - becoming a reference point within the sector. Its slogan: "*De la sidra el inventor fue un humilde mayador*" (the inventor of cider was a humble apple crusher) 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 the 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 m² they take up, 9,000 m² are buildings for apple pressing, cellars, bottling plants and storage.

Our investment in cutting edge technology have 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, the environment, health and safety, teamwork, innovative direction, 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: 60 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

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

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Vinos y Bodegas

The best wines at the best price

For over a century, the dedication of an entire family to create a professional wine business made Vinos & Bodegas possible. Its objective was to take La Mancha wines all over the world and to showcase their quality and competitive pricing in every single market.

From the very beginning, our focus was to export our wines worldwide. Thanks to our knowledge about different markets, we are able to offer custom made products. In order to fulfill every single client preference in international markets (China, Russia, USA and UK, among others), we have a wide range of brands with different styles and presentations.

Our facilities, which combine tradition and technology, are surrounded by large extensions of vines in the very heart of our natural resources, thus guaranteeing supply, production, and quality control. Every day we work to improve our products and to offer our customers the best quality.

Our facilities satisfy every market need, bottling more than 15 million bottles per year

Our wines concentrate the essence of La Mancha wines. The main grapes used, native to this area - Tempranillo and Airén -, are combined with international varieties like Cabernet Sauvignon or Merlot. These grapes are a perfect match for international food, such as any type of meat, as well as salads, pasta and fish.

Located in Socuéllamos, in the heart of La Mancha, which extends ca. 60.000 sq. m, our facilities stretch around 12.000 sq. m. and our storage capacity is 20 million liters.





Our facilities have 2 state-of-the-art bottling lines producing over 15 million bottles a year. Production capacity is 30 million. This production is possible thanks to our innovative technology, with cool and aseptic rooms to store the wine, cold and ultrafiltration and quality raw material.

We are supplied with the best grapes of La Mancha in order to offer our clients wines with great personality. We have a wide range of brands among 6 different ranges of wines whose labels are adapted to the clients' needs (language, legislation, content). Our wines are: entry level, young varietal, monovarietal (4 months in oak), premium (6, 12 and 18 months old), D.O. La Mancha and organic.

Bottled wines are stored in an insulated warehouse (15°C) with a storage capacity of 2,000 pallets. All logistics and distribution are coordinated from our production plant, with a capacity of 25 truckloads per day.

R&D is essential for us. We are constantly improving our products thanks to our cutting edge quality control laboratories. The implementation of ISO 9001, as well as BRC and IFS, and also specific certifications such as Halal and belonging to SGF, allows us to guarantee the best quality in our products. Also important HACCP critic points control enables us to verify the products traceability from arrival to departure.

We have a young professional and qualified staff with an international profile. Every single employee speaks English, and there are also some French, Russian and Chinese speakers. We have separate departments for production, purchasing, supplies, logistics, commercial purposes and IT, allowing us to provide the best personal advise to our clients.



Founded in: 1997

Productive capacity: 30 million bottles

Number of employees: 50

Export markets: China, Japan, Taiwan, South Korea, Vietnam, Philippines, Russia, Poland, Latvia, Lithuania, Serbia, Germany, Belgium, Holland, UK, Switzerland, USA, Brazil, Mexico, Jamaica, Cuba, Dominican Republic, etc.

Products: Entry level wines; young varietal wines; monovarietal wines; premium wines; D.O. La Mancha wines; organic wines. Our main grapes are: Tempranillo, Merlot, Cabernet Sauvignon, Syrah, Airén and Sauvignon Blanc

Brands: A great variety of trademarks, some of which are: María del Mar, Laray, Palacio de Anglona Selección, Amelasio, Templum, Imperium Vini, Mirador de Castilla, Tantra, Villa Canchita, RO Reserva de Oro

Certificates: ISO 9001, BRC, IFS, SGF, Halal

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