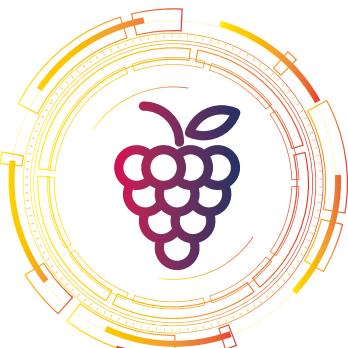


FOR A SURE WIN **INVEST IN ANDALUCÍA**



ANALYTICAL OVERVIEW OF **ANDALUSIAN AGRO-INDUSTRY**



Junta de Andalucía

Consejería de Transformación Económica,
Industria, Conocimiento y Universidades

AGENCIA DE INNOVACIÓN Y DESARROLLO
DE ANDALUCÍA IDEA

INVEST IN ANDALUCÍA

1. ANDALUSIA, A COMPETITIVE SOCIETY.

AN INVESTMENT OPPORTUNITY

A TERRITORY CONNECTED TO THE WORLD

2. ANDALUCÍA BOASTS TALENT AND KNOWLEDGE

UNIVERSITIES

PARKS AND TECHNOLOGY CENTRES

3. ANDALUSIA, THE INDUSTRY AT THE HEART OF ITS ECONOMY

STRATEGIC INDUSTRIAL SECTORS

4. SNAPSHOT OF THE FOODSTUFFS AND BEVERAGES INDUSTRY IN ANDALUSIA

COMPETITIVE ADVANTAGES

MAIN SECTORIAL COMPANIES IN THE REGION

THE FOODSTUFFS AND BEVERAGES INDUSTRY IN FIGURES

THE SPANISH AGRI-FOODSTUFFS INDUSTRY

5. THE ANDALUSIAN FARMSTEADS, THE GREAT PANTRY OF EUROPE

DATA FROM THE COMMUNITY'S PRIMARY SECTOR

FEATURED SECTORS

THREE SUCCESSFUL CASE STUDIES OF AGRICULTURAL INNOVATION IN ANDALUSIA

NATIONAL LEADER IN ECOLOGICAL OUTPUT

6. THE ANDALUSIAN WINE INDUSTRY

7. INNOVATION IN THE AGRIFOODSTUFFS INDUSTRY

INNOVATIVE PRODUCTS RESEARCH CENTRES

8. BUSINESS DIRECTORY

ANDALUSIAN AGRI-FOODSTUFF FIRMS

INVEST IN ANDALUCÍA

Andalusia boasts a sturdy industrial fabric that is committed to innovation, competitiveness and internationalisation. One of the sectors at the fore and acting as a driving force to make its way into the global economy of the 21st century is chemicals.

Andalusia is the third ranked Spanish heavyweight in this industry. It features two of the most important chemical production centres nationwide, Huelva and Campo de Gibraltar, while some of the most significant chemical multinationals in the world are already located within its territory.

This document offers a analytical overview of the myriad of reasons that exist to invest in Andalusian industry and, particularly, in the regional chemical industry.

Rationale linked to the talent of its citizens, the ability to generate knowledge and technology from this dynamic and entrepreneurial society in southern Europe, the excellent infrastructure and logistics networks in the region, and, in this case also, the drive of chemical companies already established in Andalusia that are gaining ground in the national and international market.

Investing in the Andalusian chemical industry is, in short, a safe bet, or choosing wisely. For this reason, the regional government has launched Invest in Andalusia, an initiative overseen by the Andalusian Agency for Innovation and Development (IDEA Agency) aimed at promoting, attracting and consolidating foreign investment in strategic sectors of the region.

This programme facilitates collaboration between foreign investors and Andalusian companies to increase and develop their businesses in the territory. The IDEA Agency is equipped with a team of highly qualified professionals in its investment attraction unit. This unit's mandate is to advise



companies and offer tailor-made support in each of the investment implementation phases through an extensive portfolio of services.



Investor services

PLANNING PHASE

In this first phase, Invest in Andalucía provides information to the potential investor regarding sectorial regulations, the industry itself and markets. It advises on the search for a location for the project and facilitates meetings with potential partners, experts and business organisations. It also furnishes information on aid and financing sources on-hand.

IMPLEMENTATION AND SOFT-LANDING

In this second phase, the IDEA Agency professionals report on the workforce, employment costs, fiscal aspects, working and residency permits. Furthermore, it acts as liaison to establish contacts with other institutions and companies. Finally, they guide and monitor the administrative procedures necessary for the activity's start-up and help to identify locally based suppliers.

AFTERCARE

Invest in Andalucía's work does not end with the opening of the business, moreover it continues through the assessment of business development expansion plans.

Choose wisely, invest in Andalusia

Invest in Andalucía also includes the mission of making the strengths and enormous potential of Andalusian industry known abroad; a fact that often remains unknown and is overshadowed by the enormous powerhouse of the Andalusian branding linked to history, culture, folklore and its astounding landscapes.



Andalusian companies and investors have in the IDEA Agency and in this programme, therefore, a tool with which to connect, to grow together in Andalusia and, from there, a window onto the world.

Against this backdrop...

**CHOOSE WISELY.
INVEST IN ANDALUSIA.**





01

ANDALUSIA, A COMPETITIVE SOCIETY. AN INVESTMENT OPPORTUNITY

Andalusia is a land with a history dating back millennia. It is a corner of southern Europe with endless beaches and a privileged climate. Andalusia features a mixed culture, a small homestead of universal artists. It combines monuments with nature, a place for the solace of travellers from all corners of the world. But Andalusia is so much more...

It is a land brimming over with future prospects whose inhabitants take centre stage in a tale of effort, progress and innovation that has one of its most brilliant chapters in the current drive to foster industry.

The region has been undergoing intense economic and social transformation in recent years, based on private initiative and which receives the impetus of the Public Sector Administration.

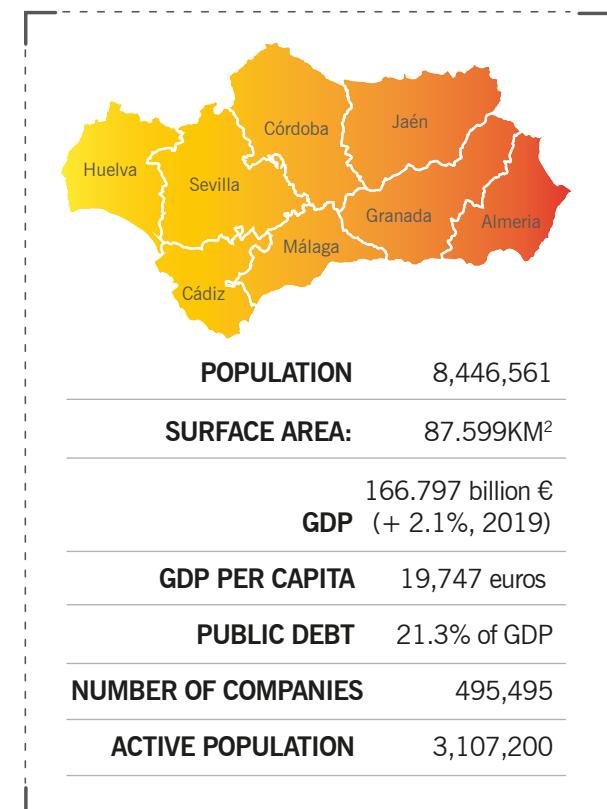
And it is here that international companies and investors enjoy the chance to develop their plans to, with Andalusian talent as an ally, advance in the global market.

Indeed, a significant number of large multinationals from different industrial sectors have already installed their production centres in the region: Atlantic Copper, Abbot, CEPSA, Bayer, REPSOL, Endesa, Heineken, Vida Farma, Acerinox, Cunext Copper, Naturgy, Valeo Iluminacion, Laboratorios Durbán, Danone, Renault, Airbus...

This is a land of opportunity. In fact, there are a thousand reasons to invest in it...

 **It is the most populated region in Spain and the second in the European Union. It is a market with enormous scope for potential due to the high number of prospective consumers.**

Andalusia's population is higher than that of certain EU countries, such as Denmark (5,806,081), and similar to that of others, such as Austria (8,858,775).



ANDALUSIA IS ...

European leader in organic farming production

Third ranked Spanish region in the ICT sector ranking

First ranked in Spain in biomass electricity generation with biomass

First ranked national power in sales in the aeronautical sector

Largest European reserve of non-ferrous minerals

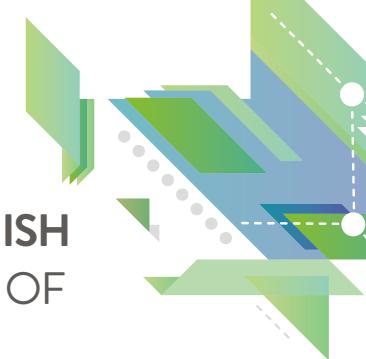
National leader in terms of energy production

Ranked second in Spain in oil refinery
In the top 3 Spanish of the biotechnology sector

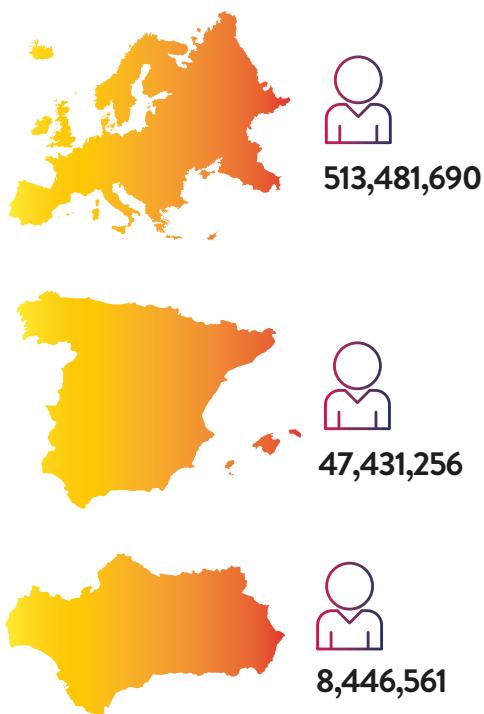
The leading Spanish power in the transformation of non-ferrous metals

At the forefront nationally for cold generation within the metalworking industry.

Autonomous community featuring two of the main chemical poles in Spain

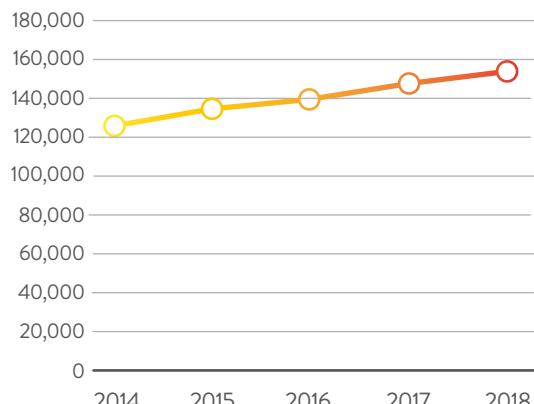


ANDALUSIA IS THE THIRD RANKED SPANISH ECONOMY IN TERMS OF GDP VOLUME



Source: National Institute of Statistics and Eurostat 2020

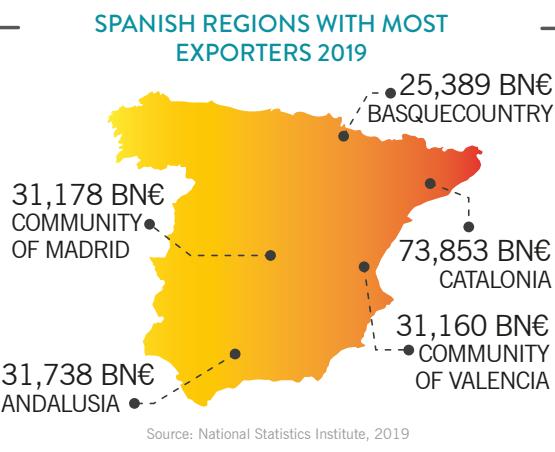
EVOLUTION OF ANDALUSIA'S GDP



Source: National Statistics Institute

- Andalusia is the Autonomous Community with the largest active population (3,943,800), ahead of Catalonia and the Community of Madrid.
- It is, among the 17 Spanish autonomous communities, ranked third in terms of contributions to Gross Domestic Product in Spain. Its economic activity accounts for 13.4% of the country's wealth.
- Andalusia has been undergoing hitherto unseen uninterrupted economic growth since 2014. Its GDP has since increased by 2.4% on a year-on-year average.
- The high-tech manufacturing companies in the community have an annual turnover of 16 billion euros (Andalusian Agency of Knowledge, 2017). R&D&i is a key factor in the development of the region.

SECOND RANKED SPANISH COMMUNITY IN TERMS OF EXPORTS: 31.738 BILLION IN FOREIGN SALES



Source: National Statistics Institute, 2019

- Andalusia is the second ranked Spanish Community in terms of exports. The value of its sales abroad amounted to 31.738 BN euros in 2019, 6.808 BN€ more than in 2015.
- Andalusian foreign trade has a positive balance of 1.185 billion euros. This data contrasts with the dynamics of the country as a whole, which has a negative balance of 31.980 billion.

AT THE FORE NATIONWIDE EN FOR ENERGY PRODUCTION

- 25,500 Andalusian companies exported goods in 2019. 5,808 of these companies have sold abroad in at least the last four years.
- Andalusia had a total of 495,495 companies in 2018, 15,165 more than in 2015.

EXPORT ACCOUNTS FOR 19.7% OF ANDALUSIAN GDP

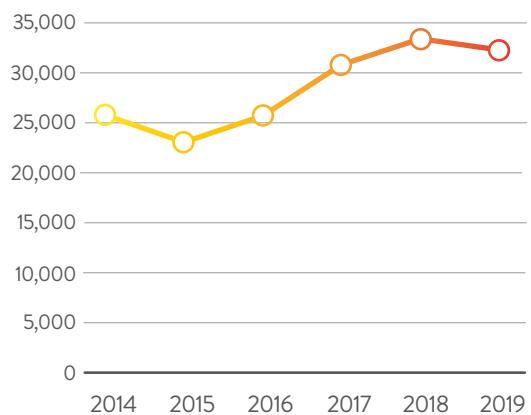
SECOND RANKED SPANISH COMMUNITY IN FOREIGN INVESTMENT GROWTH

- Andalusia is the second ranked Spanish Community with regard to international investment growth rates. In 2019, Andalusia attracted 836 million euros in foreign investment, 82% more than in 2018. 30% of these investments were concentrated in the chemical industry and 24% in the financial services sector. The countries with the highest investment stakes in the region in 2019 were Thailand (30%), the United States (27.1%) and the United Kingdom (4.5%).
- For its part, Andalusia invested 65 million euros internationally, 13% more than the previous year. Thus, the region has a favourable net capital receipt balance in 2019 of 771 million euros.

FIRST RANKED SPANISH REGION IN AERONAUTICAL INDUSTRY SALES

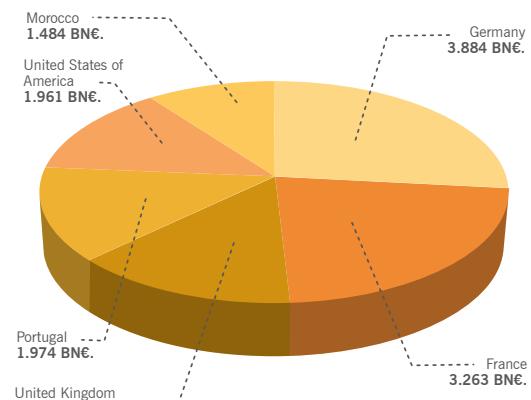
- Andalusia occupies the third position in the ranking of the communities in terms of internal expenditure on R&D, with 1.479 billion euros. In fact, the Andalusian Community, Catalonia and the Community of Madrid account for almost 60% of total internal expenditure in Spain within this heading.

GROWTH OF
ANDALUSIAN EXPORTS



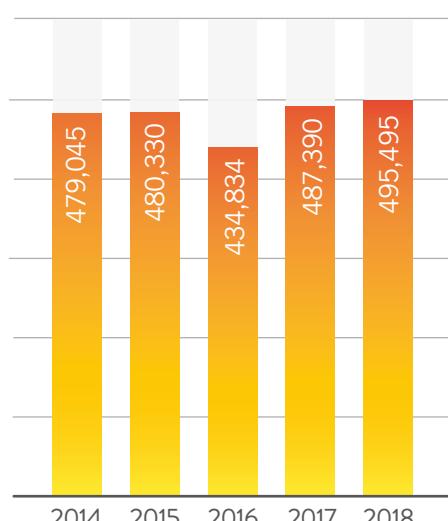
Source: National Statistics Institute

MAIN CLIENT COUNTRIES



Source: National Statistics Institute, 2019

NUMBER OF COMPANIES IN
ANDALUSIA



Source: National Statistics Institute, 2018

A TERRITORY CONNECTED TO THE WORLD

Between Europe and Africa, between the Mediterranean and the Atlantic, Andalusia gazes onto the world from its privileged geographical location, while its modern and extensive network of infrastructures facilitates international connection by land, sea and air. A determining factor not only for the Community to be a world power in tourism, but also for it to enter the industrial markets on a domestic and international scale.



AIRPORTS: Andalusia has five international airports (Malaga, Seville, Jerez, Almería and Granada) and one national (Córdoba).



PORTS: there are ten commercial ports in the region: Huelva, Seville, Malaga, Bahía de Algeciras, Cádiz, Bahía de Cádiz, Tarifa, Motril, Almería and Carboneras. Between all of them, they transported more than 160 million tons of merchandise in 2018.



ROADS: a network of 2,850 kilometres of expressways and motorways extends throughout the territory.



HIGH SPEED RAIL: Granada, Malaga, Cordoba and Seville are linked together by high-speed train and with the cities of Madrid and Barcelona.

COMPETITIVE ADVANTAGES OF ANDALUSIAN INDUSTRY BY CRISTÓBAL SÁNCHEZ MORALES, GENERAL SECRETARY OF INDUSTRY AND MINING

Faced with the needs imposed by the Covid-19 health and economic crisis and in order to maximise the effectiveness of public policies aimed at fostering those sectors suffering most due to this situation, the Government of Andalusia is offering a streamlined, direct and efficient response to the present and future needs that this complex situation is generating in the regional economy.

Precisely, the recent concentration of economic policies aimed at bolstering the fabric of Andalusian output within the Ministry of Economic Transformation, Industry, Knowledge and Universities is allowing us to further deepen connectivity between the industrial and business sectors, the scientific research that is developed in the universities and technological innovation with the aim of advancing towards a digital and more sustainable economy.



And this, with the ultimate aim of offering the regional Administration a reliable environment for the development of industrial activity, aligned with the targets set out in the new European Industrial Strategy presented by the Commission for the 2030 horizon. Thus, we are putting into practice a proactive approach to industrial policy, generating confidence, which should accompany companies to emerge stronger from the economic crisis and facilitate a value chain approach that allows for the greater use of Andalusian natural resources and the development of markets for industrial goods and services.

We have been able to verify in recent years how industry in general, and the chemical industry specifically, offers guarantees of stability and resilience in the face of the economic crisis.

Our resources are therefore being directed towards promoting a more stable and resilient industry model, geared towards climate neutrality and digital leadership, which acts as an engine of change and innovation and is competitive enough to respond to the urgent need for taking advantage of indigenous resources, as has been demonstrated in this crisis.

An industrial model, which, as the Andalusian chemical industry has been demonstrating, allows companies to adapt to a changing environment in which the aforementioned trends that have already been observed in recent years are accelerating, and where the synergies between industry and society must become increasingly more present.

Finally, we understand that it is of major significance to stress as an element that bolsters the aforementioned synergies, the broad economic and social agreement existing in Andalusia around the promotion of productive sectors, embodied in the Agreement for the Economic and Social Reactivation of Andalusia, July 30, 2020, signed between the Regional Government of Andalusia and the most representative economic and social stakeholders, which affects, amongst other aspects, the need to consolidate the financial structure of industrial companies, the identification of attractive projects for national and foreign investment, regulatory improvement, automating, simplifying and streamlining procedures, as well as the need to encourage research, development and innovation and fostering knowledge transfer through public - private partnerships.

02

ANDALUSIA:
TALENT + KNOWLEDGE + DECISIONS
= QUALITY-OF-LIFE

The Andalusian is a youthful society that enjoys the talent of its citizens as grounding for its growth. Its institutions have decided to back on the generation of knowledge as an engine of development. The foregoing, alongside a wide and excellent network of public services, makes Andalusia offer quality of life to those who wish to live and grow professionally in its territory.

Andalusia is a monument, it is history, a natural setting, a beach, a charming town, tradition, music... Yet it is also a region younger than the Spanish average (41.84 years compared to 44) in which more than 34,000 students graduate from its universities each year.

The decision to place talent and the generation of knowledge as bases for development is manifested in important public investments in the university and in the network of parks and technology centres that is spread throughout the region. Spaces, the latter, of cooperation between the Public Sector Administration, universities and the business fabric that are essential to foster knowledge transfer to the production system.

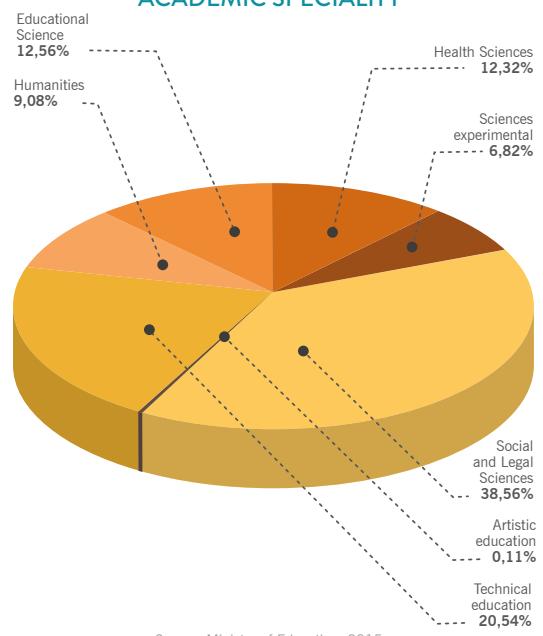
University

The university plays a key role in the region's knowledge production system, a key ally and with colossal potential for those who invest in its production system.

THE EIGHT ANDALUSIAN PROVINCES ARE THE SEAT OF AT LEAST ONE UNIVERSITY

In the territory there are 38 university campuses belonging to 11 universities, ten public (Almería, Cádiz, Huelva, Seville, Granada, Málaga, Jaén, Córdoba, Pablo de Olavide University, International University of Andalusia) and one private (Loyola University of Andalusia). Public universities offer 439 undergraduate degrees, 499 masters and 162 doctoral syllabuses in which 250,000 students enrol each year.

DISTRIBUTION OF ANDALUSIAN GRADUATES BROKEN DOWN BY ACADEMIC SPECIALITY





ANDALUSIAN TECHNOLOGY PARKS IN FIGURES




1,550
COMPANIES AND FIRMS


321 M€
INVESTMENT IN R&D


53,000
EMPLOYEES


6.701 M€
INVOICING

Source: Association of Technology Parks of Spain, 2018

Almost 40% of graduates in Andalusia belong to the branches of study of Technical Teaching, Health Sciences, and Experimental Sciences.

Furthermore, universities comprise 86% of the 2,200 registered research groups in the Community.

Half of these 2,200 research groups carry out knowledge transfer to the business system.

Technology Parks and Centres

Andalusia also has a modern and extensive network of technology parks centres in which companies committed to innovation are based.

Technology parks:

These venues are innovation ecosystems from which regional strategies are promoted that foster knowledge transfer and technological innovation. They have business incubators and common infrastructure that facilitate cooperation between companies, which receive tax boost for relocating to them.

- Scientific-Technological Park of Almería (PITA)
- Tecnobahía (Cádiz)
- Scientific and Technological Park of Cordoba (Rabanales 21)
- Scientific and Technological Park of Jaen (GEOLIT)
- PCTH Science and Technology Park (Huelva)
- PTS Healthcare Technology Park (Granada)
- Andalusia Technology Park PTA (Málaga)
- Aerospace Technology Park of Andalusia, Aerópolis (Seville)
- Cartuja Science and Technology Park (Seville)
- Soland Business Innovation Park (Seville)

Technology Centres:

ALMERIA

- Association of Harvesters Exporters of Horticultural Products of the Province of Almeria
- Experimental station at Las Palmerillas / Fundación Cajamar
- Fundación Mediterránea Company - University of Almeria
- TECNOVA Foundation
- Almeria Solar Platform - PSA

CADIZ

- Andalusian Centre for Wine-Growing Research
- Technological Skincare Centre-MOVEX
- Technological Agricultural Centre -CTAQUA
- Centre for Innovation in Advanced Manufacturing Technologies (CFA)

CORDOBA

- Foundation Centre for Agri-foodstuffs Research and Quality of Valle de los Pedroches

GRANADA

- R + D Free Software Foundation FIDESOL

HUELVA

- Agroindustry Technology Centre ADESVA

JAEN

- ANDALTEC Foundation
- Olive and Oil Technological Centre

- Ceramic Technology Centre - INNOVARCILLA

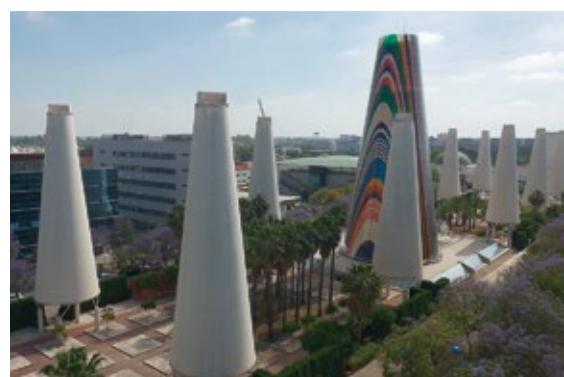
- Metalworking and Transport Technology Centre - CETEMET

MALAGA

- Andalusian Centre for Nanomedicine and Biotechnology
- Andalusia Tourism Innovation Centre - ANDALUCÍA LAB
- Railway Technologies Centre - CTF

SEVILLE

- Andalusian Industrial Research and Cooperation Association "F. by Paula Rojas "(AICIA)
- Centre for New Water Technologies
- Andalusian Committee for Ecological Agriculture
- Technological Corporation of Andalusia
- Foundation for Research and Development of Information Technologies in Andalusia
- Advanced Centre for Aerospace Technologies - FADA-CATEC





03

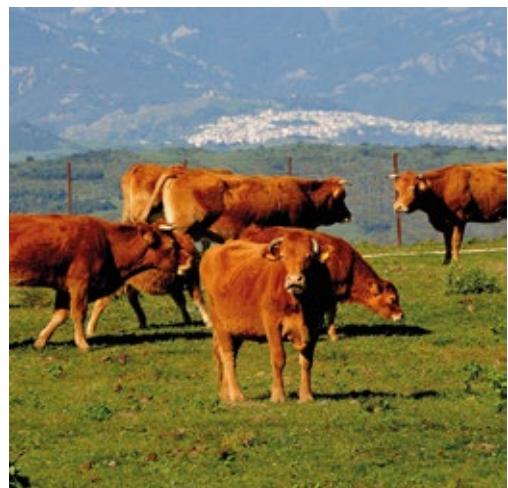
ANDALUCIA AND INDUSTRY, HISTORICALLY LINKED TO CHEMISTRY

Andalusia is not solely the first ranked Spanish region in terms of fruit and vegetable production. It is not only the leading territory in national organic production or a benchmark in livestock and fishing. Andalusia, with 17 billion euros in annual turnover, is, above all, a powerhouse in the foodstuffs and beverages industry, endowed with such competitiveness that it is the country's leading exporter in this field.

Its agro-industry drives rural development and is the main source of wealth for half of the Andalusian municipalities. It supports the creation of economic and social links between rural and urban areas. It is one of the sturdiest sources of employment in the community. The overhaul process that it has been undergoing for decades greatly guarantees the population's food security while reducing environmental impact and combating climate change. For all these reasons, agro-industry, understanding as such the set of processes that make it possible to transform farm products, from their generation to distribution, is one of the strategic sectors of the Andalusian economy, along with chemical, biotechnology, and metalworking, tourism, ICT, aerospace, logistics, sustainable construction and renewable energy.

Some of these areas connect with tradition and others are purely disruptive. Yet on the whole, due to the special position they occupy in the 21st century economy, they enjoy the support and encouragement exercised by Andalusian public institutions through policies and concrete measures that promote competitiveness, innovation and the productivity of their productive fabric.

These strategic sectors have collaboration from the public in the form of aid, subsidies, financing, infrastructures and advice for attracting investment and internationalisation. In this way, facilitating its development, Andalusia continues on the path of progress and industrial growth to improve its position in the global market.





Strategic industrial sectors

The remaining strategic sectors in Andalusia are listed below:



Chemistry

Andalusia is the third Spanish Autonomous Community in turnover of the chemical industry. It has two large production centres: the Huelva and Campo de Gibraltar chemical centres, are national benchmarks in the chemical and heavy industry. The sector generates a business volume in the territory of more than 26 billion euros and close to 27,000 direct jobs.

Metalworking

Its importance is vital as an auxiliary industry of other fundamental sectors, such as aeronautics, automotive and renewable energy. Its impact in the region amounts to 75,000 people employed in more than 9,000 companies with a joint business volume of close to 10 billion euros.



Agro-industry and nutrition.

The industry with the deepest-rooted tradition in Andalusia. Its figures leave no doubt about its enormous economic impact: it has a business volume of 17 billion euros, boasts 6,000 companies and generates 68,000 direct employment posts. The region is the market leader in Spain in exporting fruits and vegetables and a leader in organic production.



Biotechnology

The community is the third ranked bioregion in Spain in terms of business volume and number of companies, with more than 600 million euros in turnover and 108 biotech companies in its territory. The Granada Health Technology Park is the catalyst for the significant growth of health biotechnology in Andalusia, which, a pioneer in the world in stem cell research, is consolidated at the international forefront.

Mining.

It is one of the engines of the community's economy, the first European reserve of non-ferrous minerals. The Andalusian mining business volume, with 6,800 direct jobs, exceeds

1.3 billion euros. Aggregates, ornamental rock and industrial, energy and metal mining stand out.

The community is a trendsetter in solar thermal and wind energy and the first Spanish Autonomous Community in biomass electricity generation. Sun, water and wind are abundant resources in the territory and allow us to support a commitment to the production of clean energy as an alternative to hydrocarbons. Andalusia is also promoting the transition towards a more environmentally friendly, more productive and more competitive construction model. These sectors, with more than 1,500 companies in the Community, generate 40,000 direct jobs.



Logistics

The Andalusian logistics network covers an area of 1,800 hectares. Its eleven centres interconnected by land and sea represent a sizeable business opportunity for companies in this industrial field.

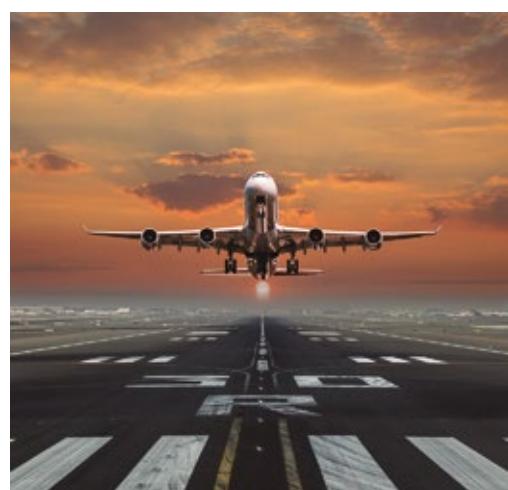
Tourism

The tourism industry, with revenue figures of 20.5 billion euros, represents 13% of GDP. The rich landscape, the historical and monumental legacy and the 2,800 hours of sunshine, attract 30 million visitors each year from the five continents who have the opportunity to enjoy a regulated accommodation offer of 546,000 beds.



Aerospace engineering

The aerospace sector enjoys more than a century's successful history in Andalusia. The manufacture and assembly of aircraft places Andalusia at the forefront of this industry. It generates a total business volume of 2.5 billion euros and employs almost 16,000 people. The presence of AIRBUS in the region, with the final assembly of the A 400-M and programmes related to the A-320 and the A-350, invigorates a sector of enormous importance in the present and the future.





04

SNAPSHOT OF THE ANDALUSIAN FOODSTUFFS AND BEVERAGES INDUSTRY

Agri-foodstuffs is the main industrial sector in Andalusia. The community, with almost 17, billion euros in income concentrates 15% of the turnover of Spain in this area.

The 6,000 existing companies in the region generate around 68,000 direct jobs. A third of the 200 companies with the highest turnover in the community belong to the agri-foodstuffs sector. Andalusia is also the Spanish community that exports most foodstuffs and beverages. It moves, in total, 22% of national sales abroad.

These are just a few figures that reveal the enormous importance of an industry that connects with the history of Andalusia, with the most traditional backbone of its economy and that, today, undoubtedly represents a strategic, vital sector that looks to the future gaining ground in the present competitiveness through the overhaul of the production processes and the diversification of its supply lines.

The Community food and drink industry has shown its strength in the years of greatest difficulties in the general economic context. It has proven itself capable of adapting and seeking out new alliances to move forward and continue on the growth path. And it has done so on the solid grounding of a series of competitive advantages that enable the sector to embrace the future in the medium and long-term with optimism

Competitive advantages

The undoubted major competitive advantage of this industry in Andalusia is **the strength of the primary sector in the region**. The richness of its countryside and its coastline, the majesty of its climate with almost 3,000 hours of sunshine a year, the variety of its productive offer and the efforts of companies to innovate on the basis of tradition and to enter new markets make of Andalusia the great pantry of Spain and one of the main suppliers to the European Union. Some data make it clear that the Andalusian farmlands are with all their might, an ideal ally for local industry. 30% of Spanish farmsteads are in this territory,

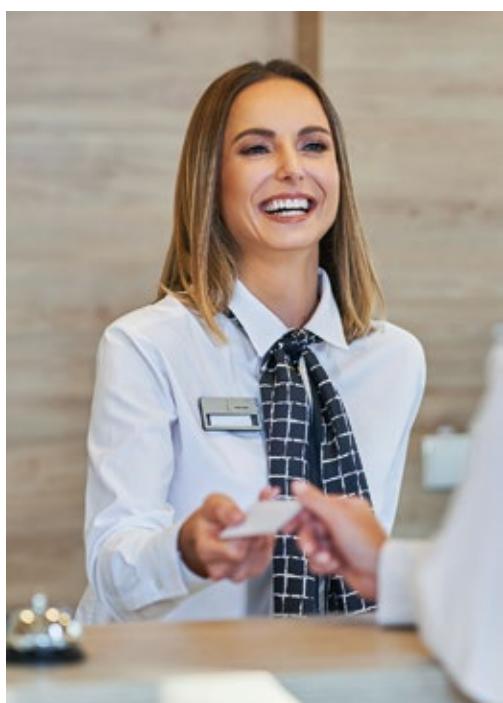




which also concentrates 25% of the production of national agrarian output, amounting to 3% of the European Union. It is the main worldwide producer of olive oil; national leader by far in ecological production and, with a third of the national volume, the first ranked community in production and export of fruits and vegetables.

The capacity for innovation and adaptation of the Andalusian countryside to consumer demand has three paradigmatic examples in the Andalusian territory: Almeria, with its greenhouses for intensive agriculture; that of the provinces of Malaga and Granada, whose commitment to tropical fruits to take advantage of their particular climatic conditions have made Andalusia a European benchmark in this type of high-profitability products, and that of Huelva, whose red berries farms supply the main Central European markets.

Andalusia, with its 8.4 million inhabitants, is the most populated Spanish region and the second in terms of number of inhabitants in the European Union. **Its more than 3 million homes constitute a large, close and powerful domestic market** for an industry devised to meet the first human need: nutrition.



Another competitive advantage of the foodstuffs and beverages industry in Andalusia is given by the importance of the local HORECA sector (hotels, restaurants and cafeterias). In the community there are almost **55,000 hotel establishments, 49,755 engaged in hostelry services and 5,218 accommodation establishments**, with a turnover approaching 17 billion euros (Yearbook of the Hospitality Industry of Spain, 2019). This business sector, with a natural inclination towards the closest suppliers, represents an important first-order outlet for the Andalusian industry, with broad market levels also in the rest of the Spanish hospitality sector, which far exceeds 300,000 establishments.

The domestic market for foodstuffs and beverages receives a huge boost from the region's tourism industry. To the demand of the 3 million Andalusian homes must be added the consumption of the 32 million tourists (20 million Spanish tourists and 12 million from abroad) that the community welcomes annually, according to the National Institute of Statistics' figures. Tourists not only consume during their stay, but also, once the Andalusian products are known, they have the possibility of ordering them from their places of origin. This boils down to more opportunities to open markets for operators in the region.

At present, a swift transformation is taking place in the habits and demands of consumers, who show a growing concern for food safety and the healthy nature of foodstuffs. This requirement benefits the Andalusian foodstuffs and beverage industry, not only because of the traceability guarantees it offers, but also owing to its link **with the Mediterranean diet**, which is synonymous with health on the plate for a large part of the European population and that is included since 2010 in the list of Intangible Humanity Heritage of UNESCO.

The quality of the Andalusian agro-industry is also certified by the **28 Protected Designations of Origin** and the **32 Protected Geographical Indications** that exist in the community and that act as legal figures for regulation and protection of authenticity. They serve, at the same time, as a guarantee for the consumer.

The seventh competitive advantage of this industry in Andalusia is given by the prestige of Spanish gastronomy in general, one of the flagships of the Spain Brand and valued on an international scale due to its undeniable quality. It is a factor that, along with the sizeable number of tourist visits and protection figures, facilitates forays into foreign markets. In this aspect, the wealth of top-rated chefs also plays a decisive role.

Spaniards and Andalusians with worldwide recognition, great ambassadors of the food and wines of the territory.

DENOMINACIONES DE ORIGEN PROTEGIDO

VINOS

- Condado de Huelva
- Jerez
- Montilla-Moriles
- Manzanilla de Sanlúcar
- Málaga
- Sierra de Málaga
- Granada

ACEITE DE OLIVA

- Antequera
- Baena
- Estepa
- Aceite de Lucena
- Montes de Granada
- Montoro-Adamuz
- Poniente de Granada
- Priego de Córdoba
- Sierra de Cádiz
- Sierra de Cazorla
- Sierra de Segura
- Sierra Mágina

JAMONES

- Jabugo
- Los Pedroches

VINAGRES

- Condado de Huelva
- Jerez
- Montilla-Moriles

OTROS PRODUCTOS

- Aceituna Aloreña de Málaga
- Pasas de Málaga
- Miel de Granada
- Chirimoya Costa Tropical

Fuente: Consejería de Agricultura, Pesca y Desarrollo Rural



PARKS AND TECHNOLOGY CENTRES OF THE ANDALUSIAN AGRI-FOODSTUFFS INDUSTRY

- Science and Technology Park of Almeria (PITA)
- Cajamar Experimental Station, Almeria
- TECNOVA Foundation, Almeria
- Association of Harvesters Exporters of Horticultural Products of the Province of Almeria
- Aquaculture Technology Centre (CTQUA), Cadiz
- Andalusian Centre for Wine Research, Cadiz
- Rabanales 21, Cordoba
- Institute of Sustainable Agriculture (IAS), Córdoba
- Foundation Centre for Agri-foodstuff Research and Quality of the Pedroches Valley (CICAP), Cordoba
- Geolit, Jaen
- Olive and Oil Technological Centre, Jaen
- Zaidín Experimental Station (EEZ), Granada
- CIDAF Technology Centre, Granada
- Agroindustry Technology Centre ADESVA, Huelva
- Institute of Horticulture
- Subtropical and Mediterranean La Mayora (IHSM), Malaga
- The Fat Institute (IG), Seville.
- Institute of Natural Resources and Agrobiology of Seville (IRNAS)
- Institute of Plant Biochemistry and Photosynthesis (IBVF), Seville
- Andalusian Committee of Ecological Agriculture, Seville
- Andalusian Institute for Agricultural, Fishing, Food and Ecological Production (IFAPA), Seville

In Andalusia there are more than 1,700 agroindustrial companies regularly exporting. These companies have already made their way into other markets, a real competitive advantage for those who wish to embark upon sales abroad.

In the community there are several parks and technological centres specialising in agri-foodstuffs. Their research generates knowledge and technical innovations that are then transferred to the industry. Plus, there are benefits from its activity with improvements passed on in terms of productivity, efficiency, competitiveness and sustainability. Biotechnology companies play an important role in this, which have generated an increasingly solid network in the community to support the food and nutrition industry.

Lastly, but not least, the role of the Regional Government of Andalusia with its policies to stimulate and promote the agri-foodstuffs sector in the region and its industry is particularly noteworthy. The Autonomous Administration has invested 728 million euros in it within the framework of its Strategic Plan for the Agro-industry of Andalusia's Horizon 2020. This plan has been developed in response to different priority lines, among which the volume of public investment stands out: support for comprehensive sustainability (299.1 million euros), efficiency and business dimension (166.2 million) and support for internationalisation (83.7 million).

Added to this plan is the service provided to companies by two other public entities: the Andalusian Agency for Innovation and Development (IDEA Agency) and the Andalusian Agency for Foreign Promotion (EXTENDA).

The IDEA Agency facilitates the access of companies to incentive systems and financial instruments to boost their activity. For its part, EXTENDA offers training services, information, specialist consulting, financing and promotion and accompaniment for international expansion.

Both the IDEA and EXTENDA agencies focus a large part of their activity on industrial sectors

PROTECTED GEOGRAPHICAL INDICATIONS

OIL

- "Oil of Jaén"

SPIRIT DRINKS

- "Jerez Brandy"

FRUIT AND VEGETABLES

- "Asparagus from Huétor-Tajar"
- "Tomato La Cañada"

HAMS AND SHOULDER HAMS

- "Trevélez Ham"
- "Serón Ham"

BAKING AND CONFECTIONERY

- "Alfajor de Medina Sidonia"
- "Mantecados de Estepa"
- "Mollete de Antequera"
- "Polvorones de Estepa"
- "Pan de Alfacar"

FISHERIES DERIVATIVES

- "Andalusian Mackerel"

- "Andalusian Frigate Mackerel"

- "Barbate Dried Tuna"

- "Isla Cristina Dried Tuna"

WINES

- "Lebrija" Country Wine

- "Vino de la Tierra
"Altiplano de Sierra Nevada"

- "Bailén" Country Wine

- "Cádiz" Country Wine,

- "Córdoba" Country Wine

- "Cumbres del Guadalfleo"
Country Wine

- "Almería Desert"
Country Wine

- "Laderas del Genil"
Country Wine

- "Láujar-Alpujarra"
Country Wine

- "Los Palacios"
Country Wine

- "Norte de Almería"
Country Wine

- "Ribera del Andarax"
Country Wine

- "Country Wine
"Sierra Norte de Sevilla"

- "Sierra Sur de Jaén"
Country Wine

- "Country Wine
"Sierras de Las Estancias
and Los Filabres"

- "Torreperogil" Country Wine

- "Villaviciosa de Córdoba"
Country Wine

OTHER PRODUCTS

- Chickpeas from Escacena",

- "Segureño Lamb"

- "Manzanilla Sevillana Olives"

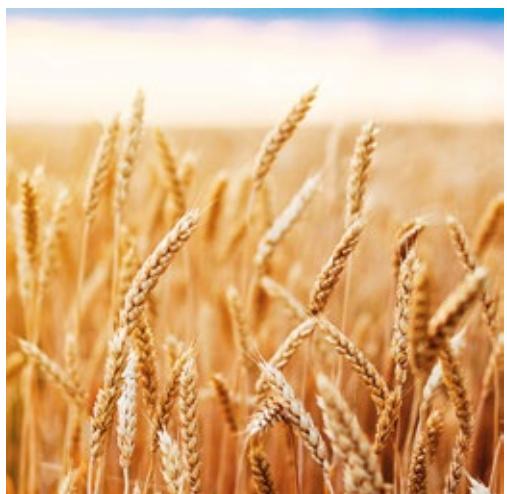
- "Gordal Sevillana Olives"

deemed strategic by the Andalusian Government, amongst which is the agri-foodstuffs industry.

All these factors give the Andalusian foodstuffs and beverages industry an obvious attraction for investors and international companies wishing to settle in the region. A place that not only offers quality of life, but also great opportunities to develop a business project in it with a vocation to break through locally and globally.

Indeed, there are already companies that operate from this region and that are significant national and international reference points within the sector.





Main sectorial companies in the region.

ACESUR (ACEITES DEL SUR). With its headquarters in the Seville municipality of Dos Hermanas and implementation in several places throughout Spain (Madrid, Toledo, Cuenca and Jaen), ACESUR covers all processes and markets in the oil sector: production, refining, packaging, marketing and export of olive oil and other vegetable oils, as well as olives, vinegars, sauces, dressings and mayonnaise.

AB MAURI With more than 100 years' history, 52 factories and sales in more than 90 countries, AB Mauri is one of the world's largest manufacturers of yeast, baking and pastry ingredients. It boasts a production centre in Santaella, Cordoba.



ÁNGEL CAMACHO ALIMENTACIÓN. With sales in more than 90 countries, it is today one of the main suppliers of table olives worldwide. It has its corporate headquarters in Morón de la Frontera (Seville) and has opened branches and own facilities in its main markets (Spain, the US, the United Kingdom and Poland). It is also engaged in the production, packaging and distribution of other products, such as herbal teas, jams and canned vegetables.

DCOOP. Based in Antequera, it is the world's largest producer of extra virgin olive oil and table olives. It is in the top position in the ranking of 2nd grade cooperatives, that is, a union of cooperatives engaged in the production of virgin olive oil, table olives and wine, while also operating in other sectors such as livestock, cereals, nuts or supplies. The DCOOP group currently exports its products to a hundred countries and has branches in the United States and China.



INÉS ROSALES. This company, founded in 1910, is specialised in the production of traditional Andalusian pastry products, such as oil cakes, traditional yuletide pastries, cinnamon pancakes, cider pasties, honey wafers, sugar wafers, fried donuts, puff pastry and sweet French toast. Its confectionary products reach more than 30 countries

MIGASA. It is one of the leading companies in the world in for bulk olive oil sales. The company, with a staff of 1,100 workers, it also produces and markets sunflower oil, olive pomace oil, vegetable oils, fatty acids, mayonnaise, vinegar, sauces and preserves Vegetables Amongst its prestigious brands is the historic sauce maker Ybarra, whose shareholding it entered in 2009.

COVAP VALLE DE LOS PEDROCHES LIVESTOCK COOPERATIVE.

This is a cooperative founded in 1959 and currently formed by 4,500 livestock partners from the province of Cordoba. It produces and markets meat, milk and dairy products and animal feed. It is one of the Andalusian companies in the food sector with the highest turnover.

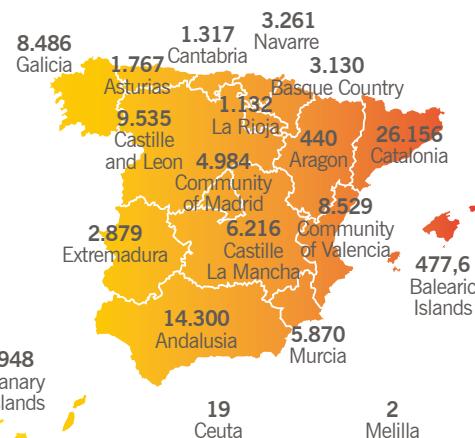
PASTAS GALLO. Although their origin, in 1946, was in Rubí (Barcelona), since 2017 they have housed their headquarters in the Cordovan municipality of El Carpio, where they also have the largest of their factories. They have traditionally produced pasta, although they have also diversified into the production of precooked fresh dishes. In 2019, the company was acquired by the Proa Capital fund for 227 million euros.

USISA. Andalusian company devoted to, for more than 40 years, traditional method production of canned and salted fish. In its only factory in Isla Cristina (Huelva) it processes more than 12,000 tonnes of fish annually.

UBAGO. Headquartered in Malaga, it is one of the leading companies in the canning sector of fish, smoked, cod and salted fish products. It boasts production plants in the capital of the Costa del Sol, on the Línea de la Concepción (Cadiz), as well as in Portugal, Morocco and Cape Verde.

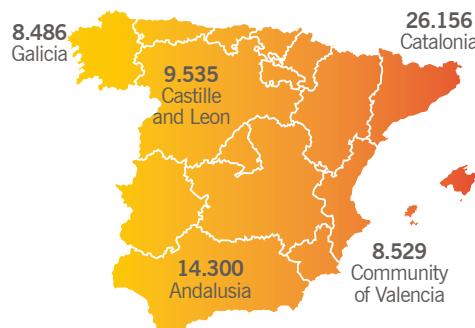
AGUAS LANJARÓN. Brand of mineral water originating from the source of the homonymous Granada town of Sierra Nevada and with 200 years' history. It currently belongs to the French firm Danone Aguas. It comprises 5% of the national mineral water market.

TURNOVER IN THE FOOD INDUSTRY BY COMMUNITIES



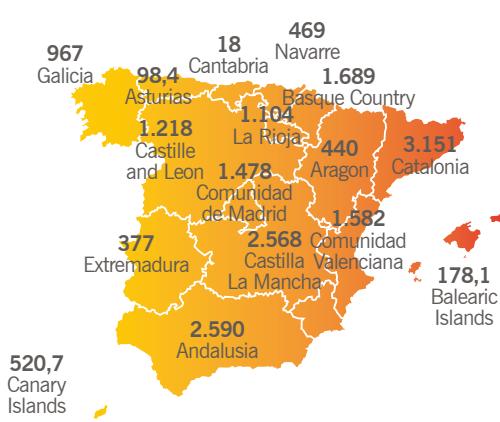
Source: INE Structural Statistics of Companies, 2017

COMMUNITIES WITH HIGHEST TURNOVER IN THE FOOD INDUSTRY



Source: INE Structural Statistics of Companies, 2017

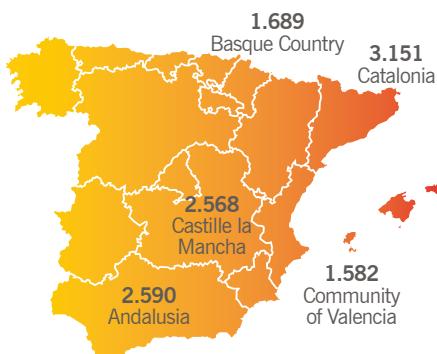
TURNOVER IN THE BEVERAGE INDUSTRY BY COMMUNITIES



Source: INE Structural Statistics of Companies, 2018

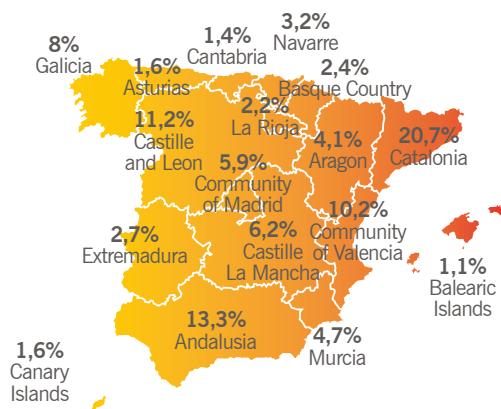


COMMUNITIES WITH HIGHEST TURNOVER IN THE BEVERAGE INDUSTRY



Source: INE Structural Statistics of Companies, 2017

EMPLOYMENT IN THE FOODSTUFFS AND BEVERAGES INDUSTRY BY COMMUNITIES



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

COMMUNITIES WITH THE HIGHEST SHARE OF EMPLOYMENT IN THE NATIONAL FOODSTUFFS AND BEVERAGE INDUSTRY



Adding indirect and induced jobs, the jobs generated by this industrial sector amount to 180,000.

Multinational agri-foodstuff companies located in Andalusia

COCA COLA EUROPEAN PARTNERS IBERIA.

The largest independent bottler of The Coca-Cola Company's beverages has concentrated its production in the centre it has maintained in La Rinconada (Seville) for 22 years. This plant, one of the most modern in Europe, covers an area of 190,000 square metres and produces more than 740 million litres of Coca-Cola products per year. That represents more than 25% of the production of Spain and Portugal.

GARCÍA CARRIÓN GROUP. The company whose origins go back to Murcia, is one of the main stakeholders in the Wine and Juice markets in Spain. Andalusia is home to two of its four plants providing domestic production, in the municipalities of Gador (Almería) and Villanueva de los Castillejos (Huelva). A sizeable part of the production of chilled organic squeezed juice, gazpachos, creams and broths, marketed under the DON SIMON brand.

HEINEKEN. This multinational beer company founded 150 years ago in the Netherlands has a factory in Seville and Jaén. These plants, together with its five commercial delegations and central offices, make it possible for the Andalusian region to concentrate 40% of the company's employees in Spain. After the acquisition of the historic Cruzcampo brand, it has become one of the leading breweries in Spain..

TOMATES DEL SUR. This is the Spanish subsidiary of the Portuguese group SUGAL, the fourth ranked world producer of tomato paste, which has a factory for this product in the Seville municipality of Las Cabezas de San Juan.

EBRO FOODS. This is the leading Spanish multinational in the food sector. World leader in the rice sector and the second largest pasta manufacturer in the world. It has a productive presence in 25 countries in Europe, Asia, America and Africa. Herba Ricemills is the head of the

the group's rice product division, whose headquarters and main industrial infrastructure are located in San Juan de Aznalfarache (Seville). It also has factories in Coria del Río and Isla Mayor.

BIMBO. The Mexican group BIMBO has almost two hundred production plants and more than 1,700 sales centres located in 32 countries on four continents. Its subsidiary BIMBO Iberia is one of the largest organisations in the food sector in Spain and Portugal. It has a factory in the Cordoba town of Puente Genil.

DAREGAL. French multinational present in Andalusia through its Daregal Ibérica subsidiary, which has a plant for the production of aromatic herbs in Santaella, in the province of Córdoba.

SOVENA. It is the largest olive oil bottling group in the world, integrated into the Portuguese holding company Nutrinveste. It sells in 70 countries and has the centre of its global olive oil business in Breñas (Seville), in addition to its main bottling plant.

LACTALIS. French group created in 1933 and world leader in dairy products. In 2010, it acquired the historic Spanish brand Puleva, one of the leading food companies in Spain, which continues to produce throughout the country from its Granada plant.

COOKE AQUACULTURE. One of the world's leading multinationals in the aquaculture sector. It is present in Andalusia with two farms of its subsidiary CÚLMÁREX in the province of Almería: one in Carboneras and another in Cuevas de Almanzora.

The Andalusian foodstuffs and beverages industry in figures

- **TURNOVER: 16.890 billion euros.**
- **Foodstuffs: 14.3 billion euros Beverages: 2.590 billion euros**

DISTRIBUTION OF THE ANDALUSIAN AGRO-INDUSTRY COMPANIES

	Aquaculture, shellfish and fisheries	264
	Use of textile fibres:	12
	Manufacture of food preparations, condiments, spices and similar:	96
	Winemaking, alcohols and alcoholic beverages:	600
	Egg and egg-based products:	74
	Vegetable oil and fat industries:	1,080
	Meat industries:	809
	Sugar, honey and wax industries:	73
	Canned vegetables, dressings and fillings industries:	360
	Fruits, fresh vegetables, flowers and ornamental plants:	796
	Handling and preservation industries:	716
	Milling industry, flour and derivatives, chopping and de-shelling:	66
	Fruit and vegetable juices, water and other agri-foodstuff beverages:	52
	Bread, confectionary and snacks:	327
	Forest industries:	41
	Dairy Industries:	156
	Feed, grains and seeds:	386
	Technical services:	12
	No division assigned:	15
TOTAL: 5,935 companies		

Source: Andalusian Institute of Statistics and Cartography 2018

MOST EXPORTED AGRI-FOODSTUFF PRODUCTS BY

	Vegetables: sales of 3.121 billion euros, 27.9% of total exports
	Fruits: sales of 2.414 million, 21.6% of total exports
	Olive oil: sales to the value of 2.382 billion, 21.3% of total exports
	Canned fruit and vegetables: sales totalling 803 million, 7.2% of total exports
	Fish and seafood: sales totalling 281 million, 2.5% of total exports

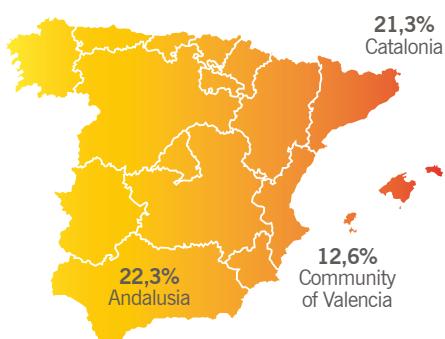
(Source: Andalusian Agency for Foreign Promotion EXTENDA, 2019)

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

1. MIGASA. Miguel Gallardo, SA. 1.035 billion euros
2. DCOOP. 1.008 billion euros
3. HEINEKEN ESPAÑA, SA. 957 million euros
4. LACTALIS PULEVA, SL. 643 million euros
5. ACESUR. 602 million euros
6. DEÓLEO, SA. 561 million euros
7. COCA-COLA EUROPEAN PARTNERS IBERIA. 554 million euros
8. SOVENA ESPAÑA, SAU. 537 million euros
9. COVAP, SCA. 476 million euros
10. UNICA FRESH. 398 million euros
11. GRUPO OSBORNE. 376 million euros
12. PERNOD RICARD ESPAÑA, SA. 358 million euros
13. GRUPO AGROPONIENTE. 393 million euros
14. GRUPO AMASUA. 330 million euros
15. GRUPO AVISERRANO. 319 million euros
16. GRUPO PASTAS GALLO. 313 million euros
17. PROAVI, SL. 309 million euros
18. GONZÁLEZ BYASS. 309 million euros
19. CASH LEPE, SA. 296 million euros
20. ALHÓNDIGA LA UNIÓN, SA. 295 million euros

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

COMMUNITIES WITH THE GREATEST SHARE IN THE EXPORT OF FOODSTUFFS AND



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

Andalusia is the second ranked Spanish community in turnover in terms of both the foodstuffs and beverage industries. The region concentrates 15.2% of the total business volume. In the food industry in Spain, the percentage rises to 13.4% with regard to beverages.

● **OCCUPATION: 67,288 direct jobs.**

● **58,390 in foodstuffs**

● **8,898 in beverages.**

This represents 13.3% of employees of this industrial sector in Spain. Andalusia is the second ranked Spanish community in generating employment in the production of foodstuffs and beverages in the country, surpassed only by Catalonia.

● **Number of companies: 5,935.**

The vegetable oil and fats industry boasts 1,080 companies. The second ranked sector in terms of number of companies is meat industries, with 809. The region has a total of 8,436 industrial establishments devoted to foodstuffs and beverages.

Seville is the Andalusian province with the highest number of foodstuffs and beverage companies, with 1,119. 67 of the 200 companies with the highest turnover in 2019 in Andalusia belong to this industrial sector, according to the ranking of 'the 1,200 Largest Companies in Andalusia' published in the Andalucía Económica magazine

● **Exports: € 11.188 billion (2019)**

It is the lead sector for community-wide exports, 35% of its foreign trade income is due to the sale of foodstuffs and beverages.

With a year-on-year increase of 4.3%, exports in this area, international sales reached its historical record in 2019 amounting to 11.188 billion euros. This represents 21% of the Spanish agri-food export levels, which rose to 53.180 billion euros in this financial year.

This industrial sector brings to Andalusia a positive balance in foreign trade of 6.475 billion euros, practically half of the surplus that the country as a whole accomplishes in this market, 13.025 billion.

Agri-foodstuff exports double in weighting in the region to the capital goods industry (16.5%) and semi-finished products (16.4%), which are the second and third ranked sectors, respectively.

 **Number of Andalusian exporting companies: 3,638**

The number of foodstuff and Beverage firms increased in the community in 2019 by 6.7% compared to the previous year. 1,736 of these are regular exporters, that is, they have exported for at least the previous four years without interruption.

The first non-EU market and seventh in the world is the United States, to which Andalusia sold foodstuffs and beverages in 2019 worth 740 million, 9.1% more than in 2018. It is followed in importance by China, with an increase in sales of 64% to 274 million euros.

 **Andalusia is the European leader in organic agricultural production.**

With a million hectares of organic crops, it concentrates **46.5% of the eco extension in Spain and 7.5% of the European one.**

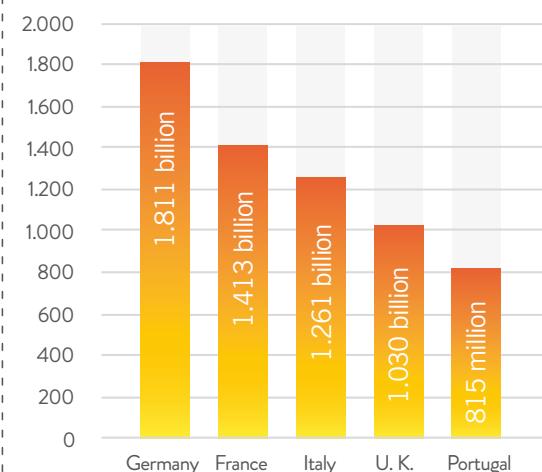
 **Andalusia is the world's leading producer of olive oil.**

980,000 of the 1.25 million tons of olive oil produced by Spain come from the community. Jaen stands out, with 46.4% of the community's production and 36.4% of national figures.

The region is the main exporter of fruit and vegetables in the European Union.

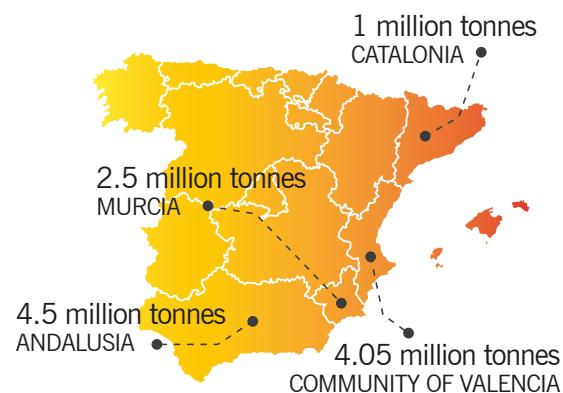
Andalusia represents, with 4.5 million tonnes, **33% of the Spanish exports of these products.**

MAIN DESTINATIONS OF ANDALUSIAN FOODSTUFF AND BEVERAGE EXPORTS



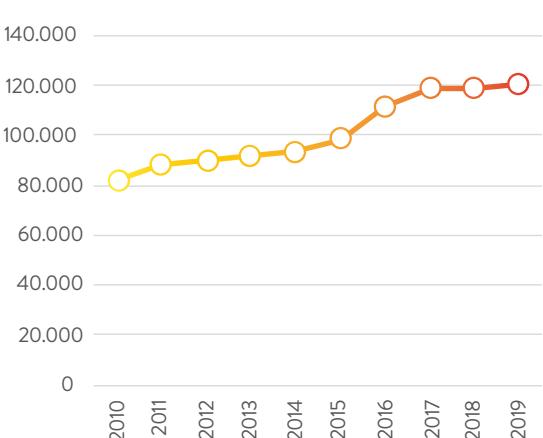
(Source: Andalusian Agency for Foreign Promotion EXTENDA, 2019)

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



Fuente: Federación Española de Productores Exportadores, 2019

EVOLUTION OF THE AGRO-INDUSTRY'S PRODUCTIVE ACTIVITY IN SPAIN



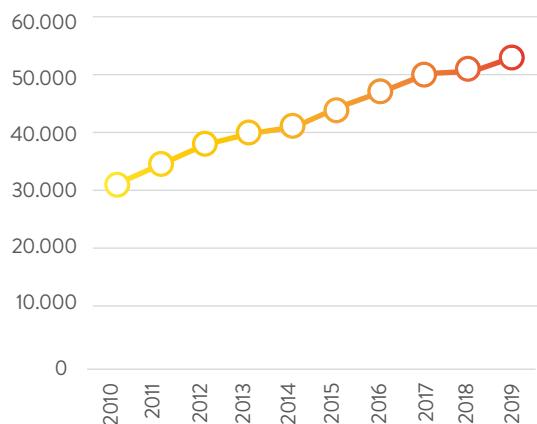
Source: Economic Report 2019 of the Spanish Federation of the Foodstuffs and beverage Industry

MAIN SPANISH AGRI-FOODSTUFF EXPORTS 2019

-  **Meat:** 7.150 billion
-  **Fruits:** 8.355 billion
-  **Vegetables:** 6.619 billion
-  **Beverages:** 4.466 billion
-  **Oil:** 4.134 billion

(Source: Ministry of Agriculture, Fisheries and Food with data from the State Fiscal Administration Agency, 2019)

PROGRESSION OF SPANISH AGRI-FOODSTUFF EXPORTS



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

The Spanish agri-foodstuffs industry

The Andalusian community is one of the mainstays of the foodstuffs and beverages industry in Spain. A sector also deemed strategic in the national economy with significant growth in its productive activity in recent years.

● **PRODUCTIVE ACTIVITY: 120.946 million euros 2019 (+ 2.1% year-on-year)**

● **GROSS ADDED VALUE: 26.556 billion euros 2019 (16.2% of the Spanish industrial GVA)**

The Spanish agri-foodstuffs industry is the third most important in the European Union, surpassed only by the French and the Italian

● **NUMBER OF COMPANIES: 30,730.**

18.7% of Spanish manufacturing companies. 0.9% of all companies in the country.

EMPLOYMENT RATES: 436,700 Social

● **Security payees. 387,500 in foodstuffs - 49,200 in the beverage industry**

● **EXPORTS: 53.180 billion euros in 2019 (+ 5.2% year-on-year).**

● **EXPORT DESTINATIONS:**

- 72% EU Member states
- 28% other nations

Within the European Union, France (8.321 billion), Germany (5.885 billion) and Italy (5.275 billion) are the three main destinations.

China is the main target outside the EU for Spanish agri-foodstuff exports, with 2.339 billion euros. It is followed by the United States (2.175 billion) and Japan (1.012 billion)

● **AGRI-FOODSTUFF IMPORTS: 38.964 billion euros in 2019**

● **FOREIGN TRADE BALANCE: +14.125 billion euros in 2019**



05

THE ANDALUSIAN FARMSTEADS, THE GREAT EUROPEAN PANTRY

The primary sector is one of the great sources of wealth in Andalusia and, due to its clout and interconnection, one of the main competitive advantages of the regional foodstuffs and beverage industry, of which it is the main ally.

Andalusia enjoys an irreplaceable supplier role in Spain and Europe. Its strength is based on the quality and diversity of production, its sustainability along with food safety and traceability.

Throughout history, as far back as one can remember, the solid performance of its agriculture, its livestock and its fishing has been a major factor in attracting the civilisations that settled in this region. The Phoenicians were well aware of its essential incentive to establish themselves in the south of the Iberian Peninsula and bolster their trade dominance in the Mediterranean.

Nowadays, the Andalusian primary sector continues to have rich and varied ecosystems: meadows, farmland, olive groves, mountains, coastline, river valleys ... Yet, it is also committed to quality, to diversify its products, to opening up to international markets with a view to modernise and innovate.

This is achieved to such an extent that **the community represents 25.1% of the national production of the agrarian branch and 3% of the European Union.** The Andalusian farmsteads are, without a doubt, the great pantry of the Spanish market.

Data from the primary sector in the community

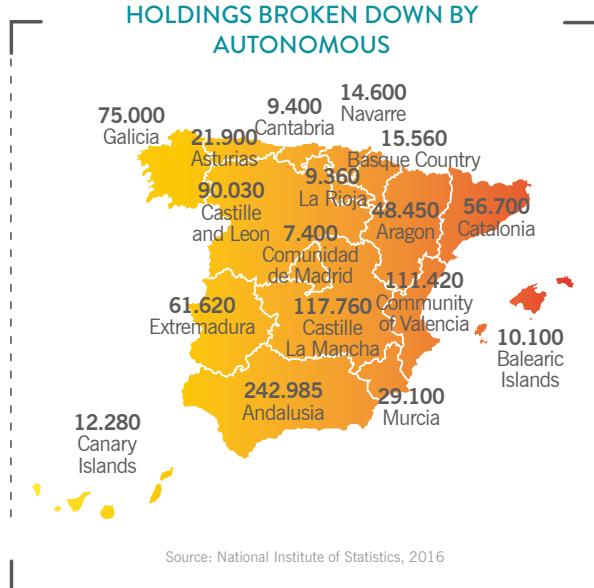
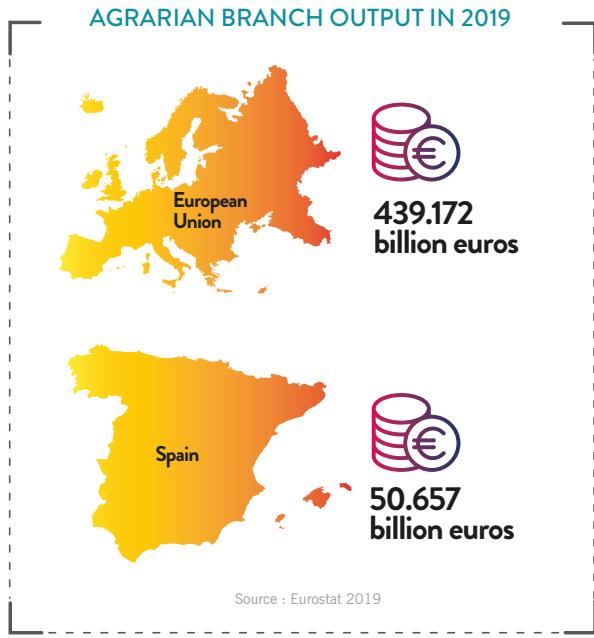
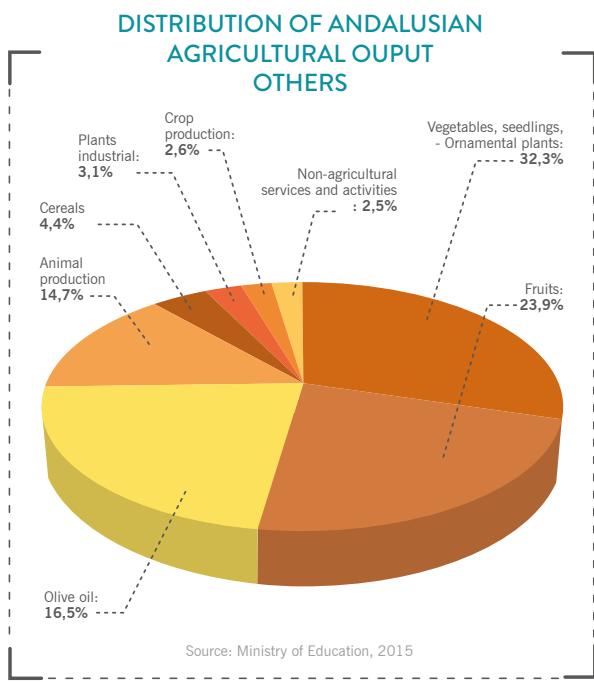
- PRODUCTION VALUE OF THE ANDALUSIAN AGRICULTURAL BRANCH: 12.736 billion euros (2019)

25.1% of the output of Spanish production and 2.9% of the European Union.

ANDALUSIA IS ...

- Agricultural leader in Spain with a quarter of the sector's production value
- World leader in olive oil production
- First ranked Spanish region in production and export of fruits and vegetables
- Benchmark in Europe in forest and tropical fruits
- First ranked national and European rice producer
- European Union leader in cotton cultivation





The Andalusian primary sector stands out especially in the production of vegetables, which concentrates 82% of its production output in 2019, while that animal production stands at 15.5%.

● AGRICULTURAL AREA USED: 4.4 million hectares, 18.9% of the national space available.

It is 50.2% of the total area of the Autonomous Community. Of this, 35% corresponds to cultivated lands and 25.3% to pastures (National Institute of Statistics, 2016). The area devoted to olive groves stands out significantly, with 1.84 million hectares.

● NUMBER OF HOLDINGS: 242,985

Andalusia is the community with the largest number of farm holdings. It has 29% of all of those countrywide. The primary sector is also, according to the Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, the main source of wealth for half of its 778 municipalities.

● NUMBER OF LIVESTOCK FARM HOLDINGS: 27,3016

Sheep and goat farms stand out in number, amounting to 28% of the total.

● IRRIGATION: 18% of the Andalusian agricultural area

These crops account for 69% of the value of Andalusian agricultural production and generate 63% of sectorial employment.

● GREENHOUSES: 53,608 hectares

In greenhouse and plastic crops, the province of Almería comes to the fore particularly, with 31,173 hectares, 58.2% of the total. It is followed by the province of Huelva, with 15,812 hectares.

Featured Sectors

LIVE GROVES. The production value of Andalusian olive groves reaches **2,400** million euros, according to the Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, 24% of the value corresponding to the Andalusian agricultural branch (2019). It is also the grounding of one of the main agro-industries of the community: olive oil.

The importance of the oil industry is reflected in the fact that 13 of the 200 companies with the highest turnover in the region's productive activity forms part of this sub-sector.

Regarding the production value of the olive groves, **2.150 billion euros are attributed to the production of olive oil and another 250 million to table olives**

In turn, olive groves occupy **1.8 million hectares in the community** (578,000 of these irrigated), **30% of the Andalusian agricultural area and 60% of Spanish olive groves.**

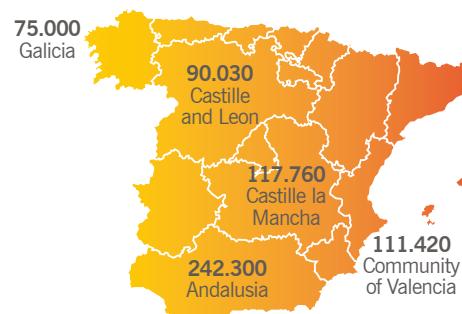
40% of the world's olive oil production comes from Andalusian olive groves (1.2 million tonnes in 2019), and **20% of that for table olives on an international scale.**

Such is the importance of the olive groves for Andalusia that they account for 28% of the region's agri-foodstuff exports, which exports olive oil worth 1.2 billion euros (21% of agri-foodstuff exports) and table olives for 420 million (7% of agri-foodstuff exports).

FRUIT AND VEGETABLES. Fruit crops occupy **124,900 hectares** in the territory, with a yield of 2.64 million tonnes. The value of this production is 3.013 billion euros in 2019, 36.4% of Spanish fruit production value.

The province of Huelva stands out above the rest, with a fruit production value worth **1.177 billion euros.**

COMMUNITIES WITH THE HIGHEST NUMBER OF HOLDINGS



ANDALUSIAN COMPANIES IN THE OLIVE OIL INDUSTRY WITH THE HIGHEST TURNOVER

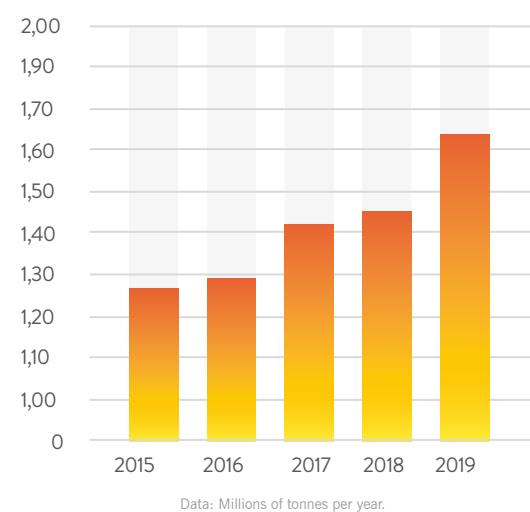
- MIGUEL GALLARDO, SA. MIGASA
- ACESUR
- DEÓLEO, SA
- SOVENA ESPAÑA, SAU
- FJ SÁNCHEZ SUCESORES, SAU.
- ACEITES LA PEDRIZA
- GRUPO ÁNGEL CAMACHO
- JAENCOOP, SCA
- OLEOESTEPA, SCA
- DE PRADO
- ACEITES MAEVA, SLU
- INTERÓLEO PICUAL JAÉN, SA
- EVOOIL 7, SL
- GRUPO SIERRA SUR

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

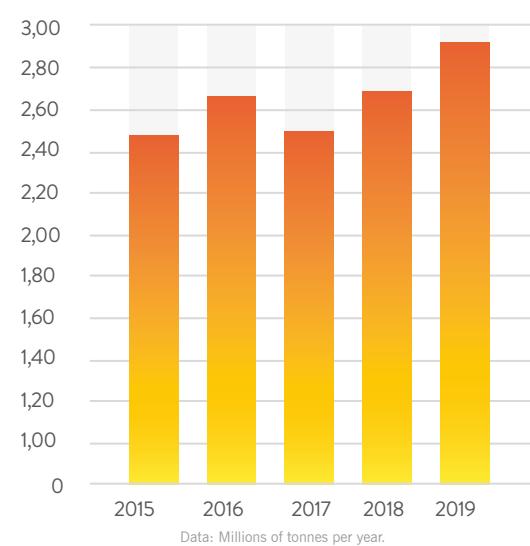
COMMUNITIES WITH THE GREATEST SHARE IN THE EXPORT OF FOODSTUFFS AND BEVERAGES



PROGRESSION OF FRUIT EXPORTS FROM ANDALUSIA



PROGRESSION OF VEGETABLE EXPORTS FROM



Regarding vegetables, the region has 122,000 hectares that yield 6.5 million tonnes in 2019, with a production value of 3.319 billion euros, 49.8 of the value of Spanish production. Of that amount, the province of Almeria accounted for 2.071 billion in the year.

Of the **13.5 million tonnes of fruit and vegetables that Spain exported in 2019**, **4.5 million came from Andalusia**, the first ranked Spanish community in the export of these products.

CEREALS, OLEAGINOUS AND PROTEIN CROPS. Andalusia boasts an area of 952,000 hectares for these crops. Production in 2019 stood at 3.11 million tonnes

Of that almost one million hectares, 22.5% is for oilseeds; 8.7% for protein crops and legumes, and 68% is for cereal, excluding rice; with more than half that percentage set aside for wheat.

RICE Andalusian rice fields occupy 38,700 hectares (all irrigated), 37% of the crops of this cereal in Spain and 9% in the European Union. Production amounts to 370,000 tonnes.

Amongst the provinces, Seville centralises 93% of this crop on a regional level.

COTTON. Andalusia is the undisputed leader in cotton production in Spain with 209 million kilos (2019). 80% of this production is distributed between the provinces of Seville and Cadiz.

The crops of this product cover 65,000 hectares, 80% national and 19% of the EU (2018), according to the Ministry of Agriculture, Livestock, Fisheries and Development.

EXTENSIVE LIVESTOCK FARMING

Located in the region are 34,210 extensive livestock farms:

- Sheep: 14,200 / 2.2 million animals
- Goat: 8,800 / 489,000 animals
- Cattle: 5,450 / 404,000 animals
- Pigs: 5,760 / 727,500 animals

PASTURELAND The region has 1.15 million hectares of pasturelands, 50% of them located between the provinces of Cordoba and Huelva. The main forest use of this ecosystem is cork production. With an average production of 36,000 tonnes between 2006 and 2014, the region accounts for 59% of the national cork production and 18% worldwide.

FISHING The value of the production of this sector in Andalusia reached a total of 2.604 billion euros in 2018

In the region, they a total of 2,440 operators are engaged in this activity. The fleet of extractive fishing vessels is particularly noteworthy, reaching a number of 1,442 vessels, 16% of the national fleet.

With a total of 20,821 direct and indirect jobs, fishing contributes a Gross Added Value to the Andalusian economy of 379.9 million euros, of which 130.47 correspond to the primary sector and 249.46 to the processing industry.

The Andalusian fishing processing industry produced 49,400 tonnes of processed food in 2018, with a value of 428.3 million euros. Of these, 39.3% corresponded to the frozen foods sub-sector.

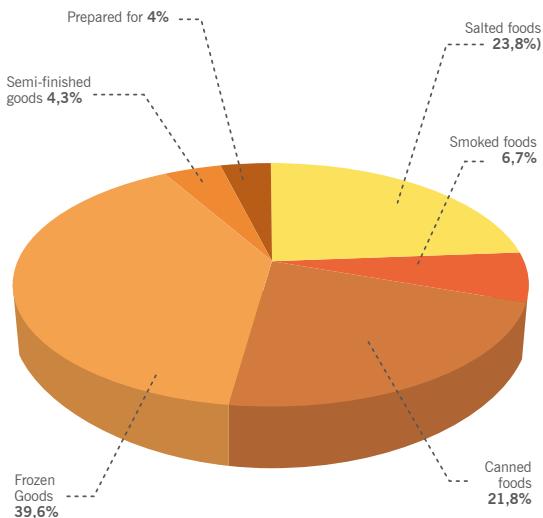
The importance of fishing is reflected in the fact that four of the 200 companies with the highest turnover in the community belong to it, either with activity in the primary sector or in the processing industry.

DISTRIBUTION OF OPERATORS IN THE ANDALUSIAN FISHERIES SECTOR

-  Acuicultura marina: **98 companies**
-  Extractive fleet **1,442 vessels**
-  Shellfisho **244 licences**
-  Wholesale trade **602 companies**
-  Processing industry: **54**

Source: Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, 2018

PERFORMANCE DISTRIBUTION OF THE ANDALUSIAN FISHING TRANSFORMATION INDUSTRY 2018



Source: Ministry of Education, 2015

- Salted fish: **5,615 tonnes / 101.1 million euros (23.8%)**
- Smoked products: **2,805 tonnes / 28.5 million euros (6.7%)**
- Canned food: **10,764 tonnes / 93.1 million euros (21.8%)**
- Frozen: **19,069 tonnes / 169.5 million euros (39.6%)**
- Semi-prepared foods: **3,052 tonnes / 18.2 million euros (4.3%)**
- Prepared foods: **8,141 tonnes / 16.9 million euros (4%)**

Source: Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, 2018



THREE CASE STUDIES ON SUCCESS STORIES IN AGRICULTURAL INNOVATION IN ANDALUSIA

- **AMASUA GROUP.** Fisheries the fishing and shellfish trade
- **MARISCOS RODRÍGUEZ GROUP.** Fishing and distribution of frozen seafood
- **GRUPO BAREA.** Wholesale of frozen fish, cod and seafood (in addition to drugstore goods and other food products)
- **UBAGO GROUP.** Production and sale of canned fish, smoked and salted fish

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

TOP INVOICING RED BERRY FIRMS IN HUELVA

- **1. ONUBAFRUIT, SCA.**
236 million
- **2. SANTA MARÍA DE LA RÁBIDA FRESÓN DE HUELVA, SCA**
160 million
- **3. EUROBERRY, SA**
150 million
- **4. MOGUER CUNA DE PLATERO, SCA**
103 million

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

The producers of the Andalusian primary sector boast centuries worth of know-how. In many cases, in fact, they are bonded to the activity through family tradition. However, based on this experience, they have managed to evolve to adapt to new market demands by diversifying their crops and, with the introduction of new production techniques, to increase the performance and profitability of their holdings.

There are three paradigmatic cases that perfectly express the overhaul that Andalusian agriculture has been experiencing in recent decades.

Huelva, national leader in red berries

Only in the first quarter of 2020, according to the Andalusian Agency for Foreign Promotion (EXTENDA), the Huelva province enjoyed a turnover of 428 million euros thanks to the international sale of these products. The main destinations are Germany, the United Kingdom and the Netherlands.

The most cultivated red fruit in Huelva and Andalusia is the strawberry, representing 52% of the output. It is followed by raspberries (31%) and blueberries (16%).

The importance of these crops in the province is certified by the verification that the value of fruit production in Huelva in 2019 amounted to 1.177 billion euros, 40% of the value of the total production of fruits in the region during this financial year.

Red fruits began to be cultivated in Huelva in the sixties of the last century. The strawberry was the first to be introduced into the region. Its adaptation was quick thanks to the abundance of sun throughout the year, a circumstance that allows for cultivation without the need for

devices. In fact, the many greenhouses scattered throughout the province (15,812 hectares) have the main function of protecting the plantations from the rain to avoid the use of fungicides

During the most recent decades, Huelva farmers have managed to develop strawberry varieties that are more intense in flavour and aroma that are enjoying increasing popularity in Europe.

In addition to strawberries, the farms in this province have been introducing other berries, whose cultivation is growing gradually, with the European market also as the main destination. Amongst these are blueberries, raspberries, and blackberries.

Currently, 4 of the 200 companies with the highest turnover in Andalusia within the agri-foodstuffs sector are linked to the red berry sector in Huelva.

Almeria, the garden of Europe

Six of the 30 Andalusian companies that sold the most abroad in 2018 belong to the agri-food sector of the province of Almeria, according to the Regional Ranking of the Andalusian Top Exporting Companies drawn up by the reference magazine Andalucía Económica.

Indeed, Almeria, according to a CAJAMAR study, exports 80% of its fruit and vegetable production, about 2.6 million tonnes. Its main destination market is the EU.

The 'Almeria Model' is a format recognised worldwide for its capacity for innovation, sustainability and quality.

The excellent export data represent one of the derivatives of the commitment to intensive agriculture that has been carried out in this eastern Andalusian province since the sixties.

Intensive agriculture is a high-performance agricultural development model based on the rational use of water, sandblasting, the use of

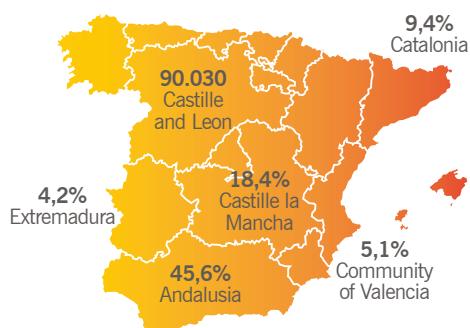
THE MAIN ALMERIA-BASED COMPANIES IN FRUIT AND HORTICULTURE EXPORT

1. **UNICA GROUP:**
250 million euros
2. **GROUP AGROPONENTE:**
200 millones de euros
3. **COOPERATIVA VICASOL:**
183 millones de euros
4. **ALHÓNDIGA LA UNIÓN:**
142 million euros
5. **AGROIRIS GROUP:**
140 million euros
6. **MUGIVERDE, SCA:**
136 million euros

Source: Ranking of Exporting Companies 2018, Andalucía Económica magazine, 2018

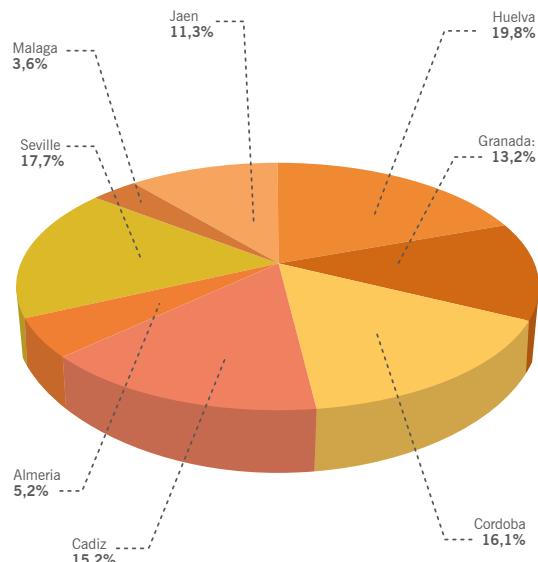


COMMUNITIES WITH LARGEST AREA SET ASIDE FOR ORGANIC FARMING



Source: Ministry of Agriculture, Fisheries and Food, 2018

PROVINCIAL DISTRIBUTION OF THE ANDALUSIAN SURFACE AREA SET ASIDE FOR ECOLOGICAL AGRICULTURE 2019



Source: Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, 2019

greenhouses, high technical training and high employment and inputs.

Water scarcity was an endemic issue in much of Almeria. For this reason, crops were historically reduced to esparto, vine, olive tree and citrus. In 1963, the first greenhouse with plastics was installed in the Campo de Dalías region.

Progressively, given the good results brought about by the mild climate, the absence of frosts and the 3,000 hours of sunshine a year, this technique spread throughout the province, with a second major boost in the early years of the 21st century.

Currently, the total area of greenhouses in the Almeria province is 31,614 hectares. The area stands out above all in the production and export of vegetables. Tomato, pepper, aubergine and cucumber are the most widespread crops.

In 2019, two million tonnes of vegetables were exported from the area worth 2.4 billion euros.

Tropical fruits: from Malaga and Granada to the entire continent

Andalusia accounts for almost 100% of the tropical fruit production in Europe. This is due to the ideal climatic conditions that occur in certain areas of the provinces of Malaga and Granada for its cultivation, and, at the same time, to the disruptive bet that at a certain moment the farmers of the territory decided to make, which they saw in these products of great value in the market a growth opportunity.

Andalusian tropical fruits are particularly appreciated in Europe. They have an undoubted advantage over imports that arrive from other continents: the greater proximity between the points of production and consumption allows the fruits to ripen longer in the plant and therefore have a shorter stay in the chamber, thereby gaining intensity, aroma and flavour.

The most cultivated tropical fruits in the community are avocado, mango and custard apple.

The 11,200 hectares of avocado that stretch between Malaga and Granada produced 82,260 tonnes of this fruit in 2018 (data from the Ministry of Agriculture, Livestock, Fisheries and Sustainable Development). Most of it, for export, with the European Union, especially France, Germany and the Netherlands, as main destinations.

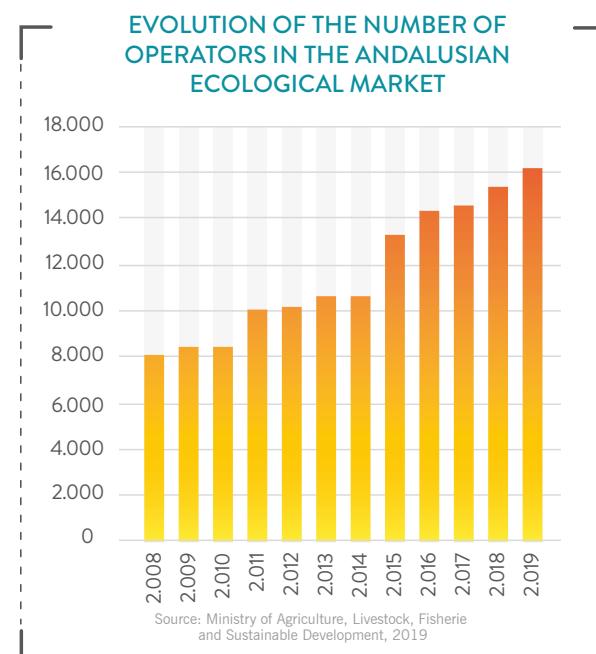
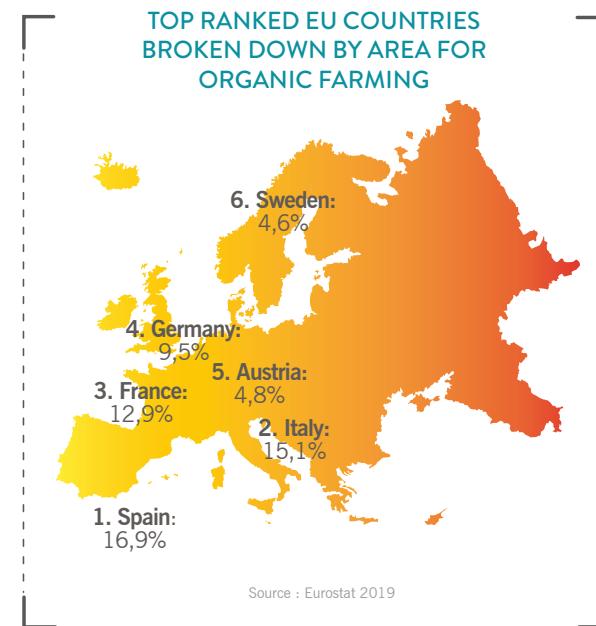
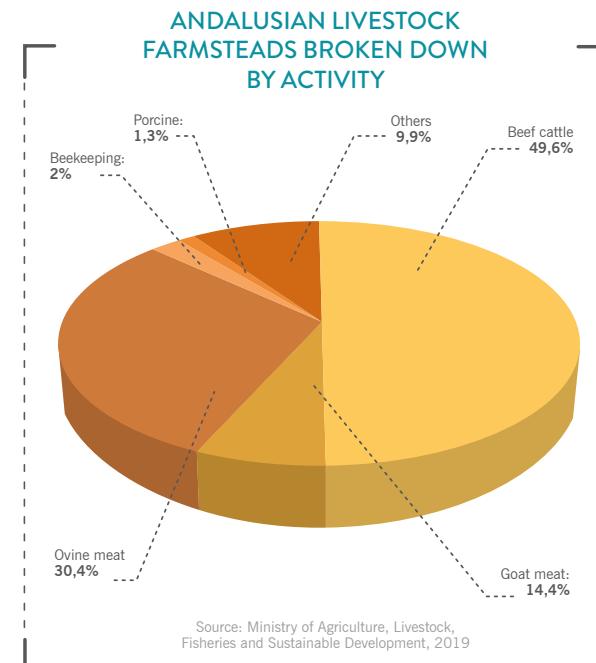
Andalusia exports approximately 70% of mango production, close to 39,000 tonnes, to the European Union. 85% of the 4,750 hectares devoted to this crop are in the province of Malaga.

Unlike mango and avocado, Andalusian custard apple production mainly supplies the national market. With some 3,000 hectares of cultivation, 43,500 tonnes of this fruit were produced in 2018.

There is an Andalusian Protected Designation of Origin for cherimoya: 'Chirimoya Costa Tropical de Granada-Malaga', which includes farms in the municipalities of Motril, Vélez de Benaudalla, Los Guájares, Itrabo, Molvízar, Salobreña, Almuñécar, Jete, Lentejí and Ótivar, in Granada, and Vélez-Malaga, Nerja, Frigiliana, Torrox and Algarrobo, in the province of Malaga.

NATIONAL LEADER IN ECOLOGICAL OUTPUT

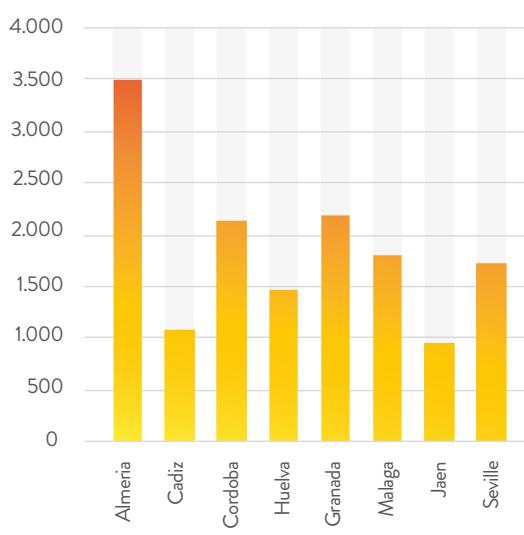
Essential for human health, for the fight against climate change, and for the economy of rural areas, organic production is growing worldwide. Likewise in Andalusia. In fact, Andalusia is the leader in Spain and Europe .



COUNTRIES WITH THE LARGEST AREA FOR ORGANIC FARMING WORLDWIDE

- 1. **Australia:**
35.6 million hectares
- 2. **Argentina:**
3.4 million hectares
- 3. **China:**
3 million hectares
- 4. **Spain:**
2.018 million hectares

ECOLOGICAL PRODUCERS IN THE ANDALUSIAN PROVINCES



Source: Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, 2018

in organic production, a sub-sector that moves 97 billion dollars annually throughout the world.

With an area of 1,024,430 hectares (2018), the region is the Spanish territory with the largest area devoted to organic crops, those in which neither chemical fertilisers nor pesticides are used. Andalusia concentrates nothing more and nothing less than 45.6% of this surface nationwide. And that in a country that leads the EU ranking in this heading, with 16.7% of the total share (2018).

It serves as a piece of information to portray the rise of organic farming in the Andalusian countryside: since 2008 the number of hectares dedicated to this form of production has increased by 240,000.

There are also 4,510 organic livestock farms in the territory, almost half engaged in beef production.

The community currently has 16,135 operators within this economic sector, double the number in 2008. A variation that also gives an idea of the widespread growth of this business in the region.

Organic production moves annually in the world, according to Ecovia Intelligence, around 97 billion dollars. It is an important market today and it is called upon to continue growing due to the evident need for more sustainable and environmentally friendly forms of production and due to the increased awareness of consumers regarding the protection of nature.

The Andalusian primary sector has seen this as a business opportunity. It has done so to such an extent that it leads organic production in Spain, which is, in turn, the leading European power in organic agriculture and the fourth worldwide.

In the Andalusian community there are 14,823 producers, 2,500 agro-industries and 4,576 cattle farms (62% of the country) within the organic sector, which in 2018 it exported from Andalusia worth 680 million euros.agricultura eco y la cuarta a nivel mundial.

THE ANDALUSIAN WINE INDUSTRY

The wine industry in Andalusia is one of the most relevant activities within the beverage sector in the community. It connects with the tradition of the territory, promotes economic development in rural areas in which the vineyard has special relevance and, given the quality of Andalusian wines and the international prestige they already enjoy in many cases, plus they have easy access to export.

It can be said without fear of equivocation that the wine industry is fundamental for the Andalusia Brand in agri-foodstuff, especially due to the role played by the Denominations of Origin with the greatest impact on sales.

12 of the 200 companies dedicated to the production of wines with the highest turnover in Spain carry out their activity in the Andalusian community.

In short, it is an undoubtedly attractive sector for national and international investors. Even more so considering that 239 million hectolitres of wine are consumed in the world.

Countries with which Andalusia has important commercial ties in agri-foodstuffs, on the other hand, are those with the highest consumption shares. Among them, the United States (31 million hectolitres), France (27), Italy (21), Germany (20), China (16) and the United Kingdom (13).

Therefore, although the Andalusian wine industry already has a notable relevance in economic terms, its growth margin is even greater. For this reason, an excellent future can be predicted for this productive sector.

- **PRODUCTION VOLUME: 1,1 million hectolitres (2019).**
- **Andalusia produces 3% of Spanish wines and grape musts (Source: Ministry of Agriculture, Fisheries and Food)**

WINERIES WITH THE LARGEST TURNOVER IN ANDALUSIA 2019

- **BODEGA LAS COPAS**
(Jerez de la Frontera, Cádiz)
- **GONZÁLEZ BYASS JEREZ, SL**
(Jerez de la Frontera, Cádiz)
- **JOSÉ Y MIGUEL MARTÍN, SL**
(Bollullos Par del Condado, Huelva)
- **JOSÉ ESTÉVEZ, SA**
(Jerez de la Frontera, Cádiz)
- **BODEGAS BARBADILLO, SL**
(Jerez de la Frontera, Cádiz)
- **SÁNCHEZ ROMATE HERMANOS, SA**
(Jerez de la Frontera, Cádiz)
- **CABALLERO EL PUERTO, SL**
(El Puerto de Santa María, Cádiz)
- **EMILIO LUSTAU, S**
(Jerez de la Frontera, Cádiz)
- **ALVEAR, S**
(Montilla, Córdoba)
- **PÉREZ BARQUERO, S**
(Montilla, Córdoba)
- **BODEGAS PÁEZ MORILLA, SA**
(Jerez de la Frontera, Cádiz)
- **NAVISA INDUSTRIAL VINÍCOLA ESPAÑOLA, SA**
(Montilla, Córdoba)

Source: Eleconomistas.es Business Ranking, 2019

DISTRIBUTION OF OUTPUT VALUE BROKEN DOWN BY GRAPE TYPE



Source: Annual Product Survey, 2015

PROVINCIAS ANDALUZAS CON MAYOR PRODUCCIÓN DE VINO



1. Cádiz: 50,47%
2. Córdoba: 25,63%
3. Huelva: 13,43%

Fuente: Consejería de Agricultura, Pesca y Desarrollo Rural, 2016

ANDALUSIAN WINES FROM DPOs WITH LARGEST PRODUCTION VALUE

- **Jerez and Manzanilla from Sanlúcar:**
104 million euros
- **Montilla-Moriles:**
31 million euros
- **Condado de Huelva:**
16.1 million euros

Source: Ministry of Agriculture, Fisheries and Rural Development, 2016

● **OUTPUT VALUE:**
180 million euros (2015)

● **VINEYARD SURFACE AREA**
WINEMAKING: 26,525 hectares (2016) (Ministry of Agriculture, Fisheries and Rural Development).

● **NUMBER OF VINTNERS:** 421

● **OCCUPATION:** 1,555 posts (2016)

● **EXPORTS:** 120 million euros (2016) (Source: ICEX)

● **DESIGNATION OF PROTECTED ORIGINS:** 8

- Condado de Huelva
- Jerez
- Montilla-Moriles
- Manzanilla from Sanlúcar
- Málaga
- Sierra de Málaga
- Granada
- Lebrija

● **PRODUCTION VALUE OF WINES UNDER DESIGNATION OF PROTECTED ORIGIN:** 167 million euros (2016)



06

INNOVATION IN THE AGRI-FOODSTUFFS INDUSTRY

Innovation is no longer necessary in the agri-food sector: it is essential to achieve a greater attractiveness of products to consumers, to ensure that they reach them in better conditions and to increase the efficiency and profitability of the productive activity of companies.

The Andalusian agri-foodstuff industry is aware of this. Thus, in the period between 2002 and 2015, the foodstuffs and beverages industry and the primary sector of the region jointly invested a total of 1,100 million euros in R & D & i (Ministry of Agriculture, Livestock, Fisheries and Sustainable Development).

This investment has led to improvements that have an impact on the environment, product quality, industrial efficiency, energy savings, business competitiveness and product traceability

Both in farming as well as in industry benefit from the activity carried out by the existing research system in the community, which has research centres and science-technology parks, mostly public or owned by the Administration, which are specialising in agri-foodstuffs and that carry out the transfer of knowledge and technical innovations to companies.

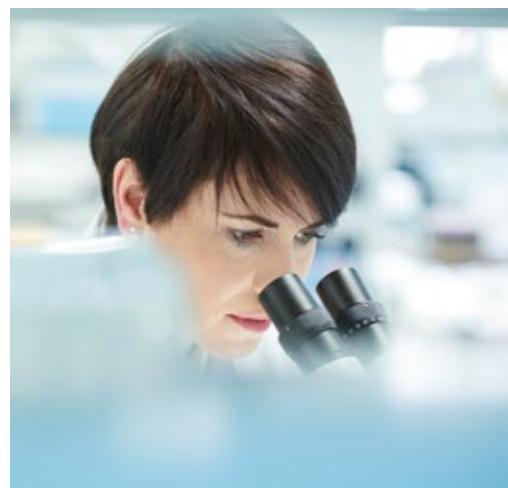
Research Centres

Science and Technology Park of Almeria (PITA)
It is a space for green biotechnology associated with agri-food, an area in which the province of Almeria is a European leader.

Through different programs, it promotes the transfer of knowledge and technology generated by research centres and the university to the productive fabric, that the competitiveness of companies is increased

It has two locations: one devoted to companies, in El Alquián, and another of a scientific nature, in the University of Almeria.

In its facilities there are a total of 75 companies with the common denominator of being highly innovative in their areas of specialisation.





CAJAMAR EXPERIMENTAL STATION

Part of the Cajamar Foundation, the Cajamar Experimental Station is a leading technological centre in intensive Mediterranean agriculture, from where technology and knowledge have been transferred to the sector since 1975.

Amongst the trials currently underway, which are being carried out in collaboration with technology centres, universities and internationally renowned companies, those related to the valorisation of agricultural by-products and the use of microorganisms in food, pharmacy and aesthetics, applying the resources of biotechnology are particularly noteworthy, as are the design of new containers and bio-functional formats for the commercialisation of healthy foods with high added value.

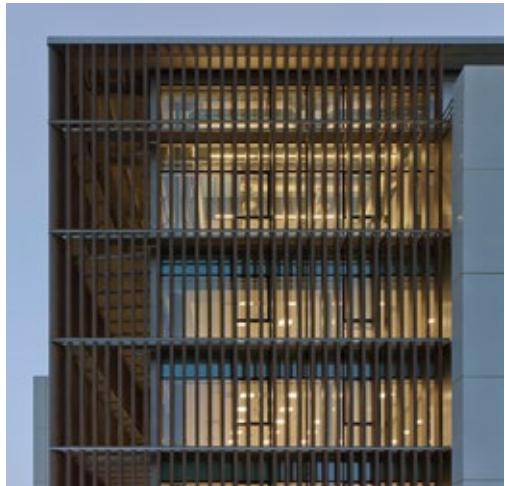


Likewise, from its headquarters in El Ejido (Almeria) it has been making progress in improving irrigation automation, biological control management, agronomic management in organic production and the introduction of alternative value crops and new varieties that guarantee the sustainability of the sector.

FUNDACIÓN TECNOVA

Headquartered in the Almeria Technology Park (PITA), the Foundation for Auxiliary Technologies for Agriculture (Tecnova Foundation) is a private non-profit entity that has been developing its activity since 2001. It is made up of more than 100 companies, institutions, companies and organisations belonging to the industry and auxiliary services of agriculture, post-harvest and agro-industry.

altamente innovadoras en sus áreas de especialización.



Tecnova promotes applied innovation and technological development to improve the competitiveness and profitability of companies in the agro-industrial sector.

ASSOCIATION OF ORGANISATIONS OF ALMERIA-BASED FRUIT AND VEGETABLES (COEXPHAL)

Currently, COEXPHAL groups 83 fruit and vegetable companies that have a provincial representation of 70% in exports, 65% in fruit and vegetable production, and 72% in ornamental production.

Since its foundation in 1977, it has been taking significant strides in terms of innovation and research in the agri-foodstuffs sector. Thus, in 1988, it created the Labcolor laboratory for waste control and food safety, which was followed, in 2001, by its recognition as the Office for the Transfer of Research Results (OTRI), and, in 2002, its listing as a Technology Centre. Since 2014, it has also held the COEXPHAL-University of Almeria Professorship.



AQUICULTURE TECHNOLOGICAL CENTRE (CTAQUA)

This private foundation has its facilities in El Puerto de Santa María, in the province of Cadiz. Since its creation in 2007, it has worked to respond to the needs of aquaculture and the seafood industry, with tailor-made solutions for different technical and production processes.

Its projects are developed around five areas:

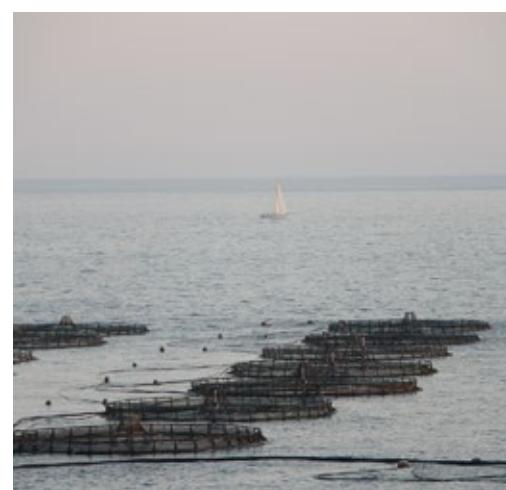
- New species.
- Animal welfare and health. Applied engineering
- Valorisation and commercialisation. The Environment.



ANDALUSIAN CENTRE FOR WINE RESEARCH

The Andalusian Centre for Wine Research (CAIV) is a mixed research institute,

linked to the University of Cadiz (UCA) and the Ministry of Economic Transformation, Industry, Knowledge and Universities of the Andalusian Regional Government, within the framework of the II Plan on Andalusian Research. This Institute was created in March 1999 and is located on the Puerto Real Campus of the UCA.



RABANALES 21



Rabanales 21, is the Scientific Technological Park of Córdoba, made up of about 60 companies, and from where the culture of innovation and development, competitiveness and entrepreneurship is fostered.

As a pole of innovation and R&D&i in the province of Córdoba, it seeks to position itself as a benchmark in the Agri-food sector and has an important representation in areas such as Information and Communication Technologies (ICT), Biotechnology and Engineering.

Currently, the companies in Rabanales 21 directly employ more than 500 workers and have an annual turnover of more than 60 million euros.

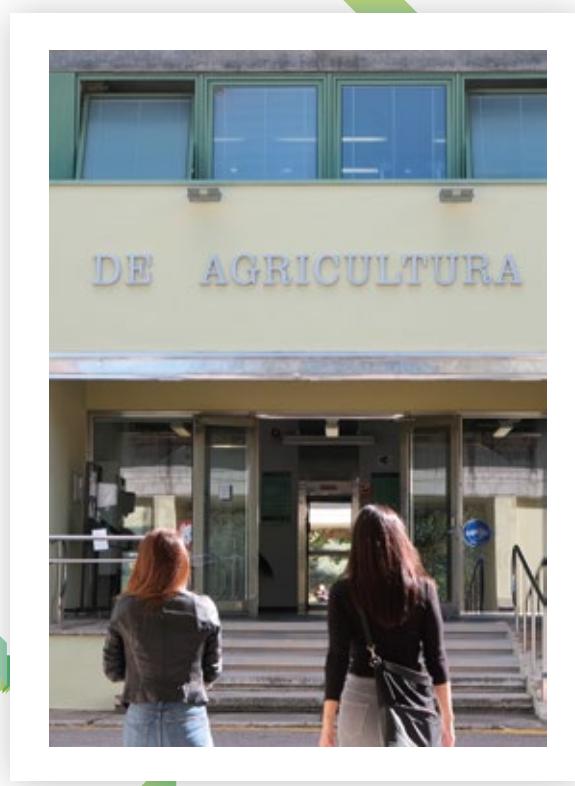
INSTITUTE OF SUSTAINABLE AGRICULTURE (IAS)

Reporting to the Higher Council for Scientific Research (CSIC), it is based at the Parque Científico Tecnológico de Córdoba, Rabanales 21.

Founded in 1992, this centre aims to develop research that makes it possible to reconcile food production with the conservation of natural resources and environmental protection.

It employs 36 researchers who open new avenues in three areas:

- **Agronomy:** management and conservation of water in the soil.
- **Plant genetic improvement:** focused on green biotechnology for the genetic improvement of oilseed crops and for increase their resistance to biotic and antibiotic stress.
- **Crop protection:** agro-ecology of weeds and control of plant diseases. biótico y antibiótico.



Foundation Centre for Agri-foodstuffs Research and Quality of Valle de los Pedroches (CICAP)

CICAP is a technology centre located in Pozoblanco, in the Valle de los Pedroches region, geared towards the agri-foodstuffs sector. Its work revolves mainly around improving animal health and the quality of the food, dairy and meat industries.

In this sense, it works to promote the competitiveness of companies in the agri-foodstuffs sector through innovation, research, quality control and management, as well as the development of new processes and products.

Created in 2007, it has a founding legal form, and the Andalusian Regional Government participates in its board of trustees, through the IDEA Agency and Agapa, as well as the University of Córdoba, the Pozoblanco City Council and private companies in the area.

GEOLIT

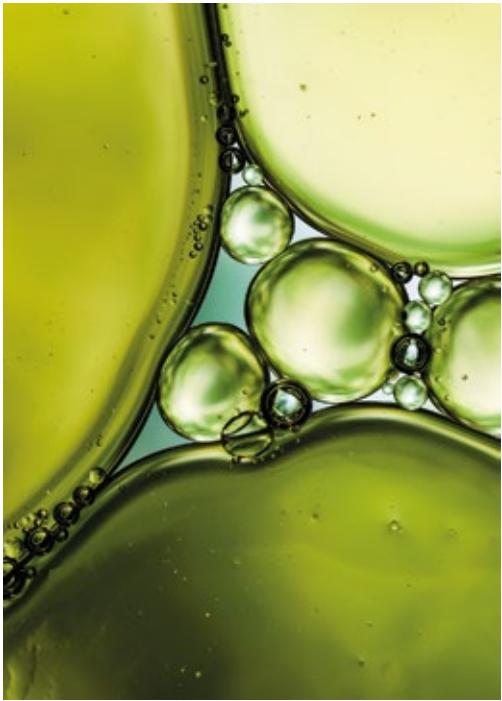
This is the Jaen Technological Science Park. Located in the municipality of Mengíbar and founded in 2000, it boasts a million and a half square metres: a third for companies; the rest, for agri-foodstuff experimentation.

It offers financial aid to companies that decide to settle in this space, offices, value-added services and an active and dynamic business and institutional environment.

OLIVE AND OIL TECHNOLOGICAL CENTRE (CITOLIVA)

Headquartered in Geolit, the Scientific and Technological Park of Jaen, Citoliva is a private non-profit foundation, created to implement innovative methodologies and technological systems that effectively solve the demands and needs of the olive oil sector. The Citoliva Foundation was established in 2002 and currently has 28 trustees, among related companies in the olive oil sector, social and financial economy entities, universities and public entities.





CENTRE FOR RESEARCH AND DEVELOPMENT OF FUNCTIONAL FOODSTUFFS (CIDAF)

Based in the PTS of Granada, the CIDAF Technological Centre is a multidisciplinary centre specialising in bioactive ingredients for agriculture, food, livestock and cosmetics.

The board of the CIDAF Foundation is comprised of 17 members. Two are public bodies, the University of Granada and the Ministry of Agriculture, to which 15 private companies are added.

ZAIDÍN EXPERIMENTAL STATION

The Zaidín Experimental Station (EEZ) is a research centre belonging to the Higher Council for Scientific Research (CSIC). The activity of the EEZ is mainly focused on the field of Agricultural Sciences and is arranged into four departments:

- Biochemistry, Cellular and Molecular Biology of Plants
- Soil Microbiology and Symbiotic Systems Environmental Protection
- Physiology and Biochemistry of Animal
- Nutrition

It has two headquarters, the headquarters in Granada and the headquarters of the Animal Nutrition Unit, in the Granada municipality of Armilla.

TECHNOLOGY CENTRE FOR AGRO-INDUSTRY (ADESVA)

Based in the Huelva municipality of Lepe, the ADESVA Agro-industry Technology Centre is a non-profit business association, which brings together more than 60 companies and representative public institutions of the agro-industrial sector and auxiliary services to agriculture. It was founded in 2001 and was awarded the qualification of Technological Centre in 2007.

INSTITUTE OF SUBTROPICAL AND MEDITERRANEAN HORTICULTURE LA MAYORA (IHSM)

The Institute of Subtropical and Mediterranean Horticulture "La Mayora" is a mixed CSIC-University of Malaga (UMA) centre.

It was created to join the efforts of the groups of the pre-existing Experimental Station "La Mayora" of the Higher Council for Scientific Research (EELM-CSIC) and groups of various departments of the University of Malaga (UMA) to promote and coordinate research more efficiently scientist into intensive horticulture and subtropical fruit growing that both bodies had been developing.

The IHSM, established in 2008, has a headquarters on the UMA Campus of Teatinos, which houses the research groups of the CSIC and the UMA, and maintains the Experimental Station "La Mayora" (located in the Malaga municipality of Algarrobo) as a fundamental part of the Institute.

FAT INSTITUTE

It is a centre dependent on the Higher Council for Scientific Research. It is based on the campus of the Pablo de Olavide University, in Seville. Its mission is to develop research aimed at characterising and obtaining quality, healthy and safe foodstuffs, as well as implementing new techniques in the agricultural sector that respect the environment. Its activity also provides evidence on the improvement of health, the prevention and treatment of diseases through the use of bioactive ingredients and plant and food components.

INSTITUTE OF NATURAL RESOURCES AND AGROBIOLOGY OF SEVILLE (IRNAS)

The Institute of Natural Resources and Agrobiology of Seville is a centre of the Higher Council for Scientific Research (CSIC) whose aim is to research into the use and conservation of soil, water and plant natural resources, with special attention to arid and semi-arid areas, to





respond to the issues derived from their cultivation.

Alongside pursuing quality scientific production with international relevance, it develops useful components and tools for users of agricultural and forestry resources, environmental protection agencies and the Administration. In this way, it aims to contribute to increasing productivity while protecting the environment and ensuring the sustainability of resources.

ANDALUSIAN INSTITUTE FOR AGRICULTURAL, FISHERY, FOOD AND ECOLOGICAL PRODUCTION RESEARCH AND TRAINING (IFAPA)

Reporting to the Ministry of Agriculture, Livestock, Fisheries and Sustainable Development, the Andalusian Institute for Agrarian, Fisheries, Food and Ecological Production Research and Training (IFAPA) has its headquarters in Seville, although it has 15 other specialist hubs, distributed throughout the Andalusian provinces. It is a public body devoted to promoting research and technological innovation in these productive sectors.

Its activity focuses on seven areas:

- Aquaculture and marine resources
- Sustainable plant protection
- Food and health
- Economics of the food chain Genomics and biotechnology Agriculture and environment
- Food engineering and technology

Innovative products

The commitment to innovation from the Public Sector Administration and the companies of the community comes to fore in the form of ground-breaking and clearly differentiated products that the Andalusian foodstuffs and beverages industry launch on the market.

Products that are aimed directly at the consumer in ways that connect with new trends in demand

or that are presented as technological innovations that open up different manufacturing avenues for companies. Below are a few examples.

TRITORDEUM.

That is the name of the first newly created cereal that is marketed in the world for human consumption. It is born out of the combination by genetic engineering of a durum wheat and a wild barley native to South America. It is a healthy alternative with a low environmental impact developed by a group of scientists from the Institute of Sustainable Agriculture of Andalusia.

FRUIT TO SUBSTITUTE SUGAR.

The Sevillian group Ángel Camacho has launched Endulsana, a natural sweetener made 100% with fruits (apple, carob and grape). It has a low glycaemic index and 25% fewer calories than sugar.

SOLID OLIVE OIL.

This is a creation of the Huelva Healthy Food Ibérica, engaged in the manufacture of healthy vegetable fats for confectionary and pastries. The company has launched it on the market under the Verdeo brand, with which olive oil passes from a liquid to a solid state through natural procedures. In this way, as it can be laminated, thus facilitating tasks in the bakery.

BEERS AND WINES WITH LESS YEAST.

A community biotech start-up, Cultiply, has created a device that reduces beer and wine fermentation costs by up to 90%. This device creates the ideal physical and nutritional conditions for the bacteria responsible for this process to multiply.

THE DEBUT STRAWBERRY GIN

This is a product launched on the market in 2013 by a distillery in Carmona (Seville) under the Puerto de Indias brand. In less than five years, they went from selling 2,000 bottles a year to 6.5 million. Now, they export to countries on three continents: United Kingdom, Switzerland, Germany, Portugal, Japan, Ecuador, Mexico; United States...





A SAUCE WITH TWO THOUSAND YEARS' HISTORY.

Garum was a staple in the diet of the ancient Romans. This sauce was obtained through the fermentation of salted fish. A Jerez-based company, El Majuelo, produces and markets this product, which dates back more than two millennia, under the name 'Flor de Garum'. It has been possible thanks to the previous work of scientists from the University of Cadiz, who recovered the recipe from the analysis of garum remains found in the cities of Pompeii and Baelo Claudia.



AN APP TO FACILITATE TRACEABILITY.

This is the brainchild of the Bionaturalapps company. This application allows farmers and ranchers to carry out all traceability through it, even when they are simultaneously engaged in several different activities.

FOOD NANO-CAPSULES.

The Andalusian company Alsen Tech has developed a micro and nano encapsulation system for the food industry that allows the controlled release of ingredients and active ingredients and the masking of unwanted smells, tastes and colours.

THE WORLD'S FIRST LEMON WINE.

Bodegas Privilegio, from the town of Bollullos Par del Condado, in Huelva, launched the world's first wine on the market in 2016 in which different varieties of white grape and this citrus fruit were combined.

A PLATFORM TO GUARANTEE THE OPENNESS IN MANUFACTURE

Nutrasign, a Huelva company, has created a blockchain technology to digitally certify the history and journey of foodstuffs. Its platform connects the different actors in the production chain so that they can track the ingredients and products of each stage.

THE ONLY ECOLOGICAL OLIVE WITH A PROTECTED DESIGNATION OF ORIGIN.

This is the Aloreña Olive from Malaga



Produced at the Manzanilla Alorena Olivarera Cooperative. It received the award for the best innovative organic product at Organic Food Iberia 2019, the largest professional fair for organic products in Europe.





07

DIRECTORY OF ANDALUSIAN AGRO-INDUSTRY COMPANIES

Beverages

ALVEAR, SA.

Wine crafting and ageing Montilla
(Cordoba)
www.alvear.es

AZUCARERA DEL GUADALFEO, SA.

Destilación, rectificación y mezcla
de bebidas alcohólicas
Salobreña (Granada)
www.az-guadalfeo.com

BODEGA LAS COPAS, SL.

Wine crafting and ageing
Jerez de la Frontera, (Cádiz)

BODEGAS BARBADILLO, SL.

Crafting, bottling and sales of wine Sanlúcar
de Barrameda (Cádiz)
www.bardadillo.com

BODEGAS COLLADO, SL.

Wholesale of beverages of all types and
gourmet foodstuffs
San Roque (Cádiz)

BODEGAS LARA, SL.

Wholesale of beverages and liquors in
general
Málaga

BODEGAS MÁLAGA VIRGEN, SL.

Crafting, ageing and sales of wines Fuente of
Piedra (Malaga)
www.bodegasmalagavirgen.com

BODEGAS PAEZ MORILLA, SA.

Crafting and marketing of wines and
vinegars
Jerez de la Frontera (Cádiz)
www.bodegaspaezmorilla.com

BODEGAS TORO ALBALÁ, SL.

Wine crafting and ageing
Aguilar of la Frontera (Cordoba)
www.toroalbala.com

BODEGAS WILLIAMS & HUMBERT, SAU.

Ageing and exporting of wines and brandies
of Jerez
Jerez de la Frontera (Cádiz)
www.williams-humbert.com

BODEGAS Y DESTILERÍAS DEL SUR, SA.

Crafting, ageing and marketing of wines and
liquors
Montilla (Cordoba)
www.bodegascruzconde.es

EMILIO LUSTAU, SA.

Manufacture, ageing, crafting,
transformation, marketing, importing and
exporting of wines, brandies and schnapps
Jerez de la Frontera (Cádiz)
www.emilio-lustau.com

BODEGAS HIDALGO-LA GITANA, SA.

Crafting, ageing, sale and distribution of wines
Sanlúcar de Barrameda (Cádiz)
www.lagitana.es

DELGADO ZULETA, SA.

Crafting, ageing and marketing of wines
Sanlúcar de Barrameda (Cádiz)
www.delgadozuleta.com

GONZÁLEZ BYASS.

Ageing, crafting and distribution of wines,
brandies
Jerez de la frontera (Cádiz)
www.gonzalezbyass

GRUPO ESTÉVEZ.

Wine and brandy crafting and ageing
Jerez de la Frontera (Cádiz)
www.grupoestevez.es

GRUPO OSBORNE.

Manufacture, ageing and crafting of wines
and other beverages
El Puerto de Santa María (Cádiz)
www.osborne.es

HEINEKEN ESPAÑA, SA.

Manufacture and distribution of beverages
Seville
www.heinekenespana.es



HEREDEROS DE ARGÜESO, SA.

Wine crafting and ageing
Sanlúcar de Barrameda (Cádiz)
www.argueso.es

INDUSTRIAS ESPADAFOR, SA.

Production of non-alcoholic drinks;
manufacture of mineral waters and other
bottled waters
Granada
www.espadafor.es

JOSÉ Y MIGUEL MARTÍN, SL.

Wine crafting and ageing
Bollullos Par del Condado (Huelva)

LUIS CABALLERO, SA.

Crafting and marketing of wines and fortified
spirits
EL Puerto de Santa María (Cádiz)
www.caballero.es

LOS ALCORES DE CARMONA, SL.

Production of fortified spirits
Carmona (Sevilla)
www.ginpuertodeindias.com

NAVISA INDUSTRIAL VINÍCOLA ESPAÑOLA, SA.

Wine crafting and ageing
Montilla (Córdoba)
www.navisa.es

PÉREZ BARQUERO, SA.

Wine vinegars crafting and ageing
Montilla (Córdoba)
www.perezbarquero.com

PERNOD RICARD ESPAÑA, SA.

Manufacture and distribution of wines and
other fortified spirits
Málaga
www.pernod-ricard.com

RIVES DISTILLERY COMERCIAL, SA.

Manufacture and distribution of beverages
El Puerto de Santa María (Cádiz)
www.rivesdistillerycomercial.com

SÁNCHEZ ROMATE

HERMANOS, SA.
Wine crafting and ageing
Jerez de la Frontera (Cádiz)
www.romate.com

TIO PEPE WINE COMPANY, SL.

Crafting, ageing and sales of wine and
liquors
Jerez de la Frontera (Cádiz)
www.tiopepe.com

VINÍCOLA DEL CONDADO, SCA.

Crafting and sales of wines
Bollullos Par del Condado Huelva)
www.vinicoladelcondado.com

VINOS COVIGRAN, SA.

Wholesale of wines and liquors
Ogijares (Granada)
www.vinoscovigran.com

ZUMOS PALMA, SL.

Production of juices, nectars and
vegetable-based drinks
Palma del Río (Córdoba)
www.zumospalma.com

Oil, table olives and vegetable fats

ACEITES ABASA, SAU.

Manufacture and marketing of Baena olive oil
Baena (Córdoba)
www.avceitesabasa.net

ACEITES CAZORLA, SCA.

Manufacture, packing and marketing of olive oil
Cazorla (Jaén)
www.aceitescazorla.com

ACEITES LA PEDRIZA.

Manufacture and marketing of olive oil,
olives and capers
Sorbas (Almería)
www.fjsanchez.com

ACEITES MAEVA, SLU.

Manufacture and packaging of olive oil
Escúzar (Granada)
www.aceitesmaeva.com

ACEITES MÁLAGA, SL.

Packaging and marketing of olive oil, sunflower oils and seeds, vegetable preserves and distribution of foodstuff products in general

Málaga

www.aceitesmalaga.com

ACEITUNAS GUADALQUIVIR, SL.

Dressing of table olives

Morón de la Frontera (Sevilla)

www.agolives.com

ACESUR.

Manufacture, packaging and distribution of olive oil and sauces

Dos Hermanas (Sevilla)

www.acesur.com

AGROOLIVARERA SAN COSME Y SAN DAMIÁN, SCA.

Manufacture of olive oil and animal feed

Almargen (Málaga)

www.sancosmeysandamian.com

AGRO SEVILLA GRUPO.

Manufacture, packaging and marketing of table olives

Roda de Andalucía (Sevilla)

www.agrosevilla.com

AIRES DE JAÉN, SL.

Manufacture, packaging and marketing of olive oil

Jabalquinto (Jaén)

www.airesdejaen.com

ALMAZARAS DE LA SUBBÉTICA, SCA.

Manufacture and packaging of olive oil

Carcabuey (Córdoba)

www.almazarasdelasubbetica.com

ANTONIO CANO E HIJOS, SA.

Manufacture and packaging of olive oil and flour

Luque (Córdoba)

www.oleocano.com

COREYSA.

Refining, packaging and sale of olive oil and other vegetable oils.

Osuna (Sevilla)

www.coreysa.es

DÉOLEO, SA.

Manufacture and distribution of olive oil, rice, biscuits and other foodstuffs

Alcolea (Córdoba)

www.deoleo.com

DE PRADO.

Manufacture and marketing of olive oil, olives and pickles

Córdoba

www.deprado.eu

EMILIO VALLEJO, SA.

Manufacture, packaging and sale of olive oil

Torredonjimeno (Jaén)

www.aceitesvallejo.com

FRAMOLIVA, SA.

Manufacture and packaging of olive oil

Huévar del Aljarafe (Sevilla)

www.framoliva.com

GRUPO ÁNGEL CAMACHO.

Preparation, packaging and marketing table olives and other foodstuffs

Morón de la Frontera (Sevilla)

www.angelcamacho.com

GRUPO CASTILLO DE CANENA.

Crafting and sale of olive oil

Baeza (Jaén)

www.castillodecanena.com

GRUPO GOYA EN ESPAÑA.

Crafting, packaging and sale of olive oil, table olives and pickles

Alcalá de Guadaíra (Sevilla)

www.goyaspain.com

GRUPO SIERRA SUR

Manufacture, packaging and marketing of olive oil

Pinos Puente (Granada)

www.aceitessierrasur.es

GRUPO YBARRA ALIMENTACIÓN, SL.

Manufacture and marketing oils, olive oil,

sauces and other foodstuff products

Dos Hermanas (Sevilla)



HEALTHY FOOD IBÉRICA, SL.

Manufacture of margarine and edible fats
Lepe (Huelva)

INTEROLIVA.

Manufacture, packaging and marketing of table olives and pickles
Dos Hermanas (Sevilla)
www.interoliva.com

JAENCOOP, SCA.

Manufacture and marketing of olive oil
(Villanueva del Arzobispo (Jaén))
www.jaencoop.com

LA RENTILLA, SL.

Manufacture and marketing of ecological olive oil
Montilla (Córdoba)
www.larentilla.es

LOS REMEDIOS-PICASAT, SCA.

Crafting and marketing of olive oil and animal feed
Olvera (Cádiz)
www.remediospicasat.com

LUQUE ECOLÓGICO, SL.

Manufacture and packaging of ecological olive oil
Castro del Río (Córdoba)
www.alcubilla2000.com

MANZANILLA OLIVE, SCA.

Manufacture and packaging of table olives, olive oil and cereals
Utrera (Sevilla)
www.manzanillaolive.es

MIGASA. MIGUEL GALLEGOS, SA.

Manufacture and distribution of olive oil and other foodstuff products
Dos Hermanas (Sevilla)
www.migasa.com

MOLINO VIRGEN DE FÁTIMA, SL.

Manufacture and marketing of olive oil a
Castro del Río (Córdoba)
www.molinovirgendifatima.com

OLEÍCOLA JAÉN, SA.

Dressing and sale of table olives
Baeza (Jaén)
www.oleicolajaen.es

ÓLEO MORÓN, SL.

Dressing and packaging of table olives
Morón de la Frontera (Sevilla)
www.oleomorón.com

OLEOESTEPA, SCA.

Manufacture, packaging and marketing of olive oil
Estepa (Sevilla)
www.oleoestepa.com

OLIVARERA MANZANILLA ALOREÑA, SCA.

Dressing and sale of table olives
Álora (Málaga)
www.manzaoliva.com

OSUNA MISSION, SL.

Dressing and packaging of table olives
Osuna (Sevilla)

ROMERO ÁLVAREZ, SA.

Manufacture of olive oil. Meat industry
Sevilla
www.romeroalvarez.com

SAN FRANCISCO DE ASÍS DE MONTEFRÍO, SCA.

Manufacture and packaging of olive oil
Montefrío (Granada)
www.aceitesmontevilla.com

SAN ISIDRO DE LOJA, SCA.

Manufacture and packaging of olive oil and green asparagus
Loja (Granada)
www.loxa.es

SAN SEBASTIÁN, SCA.

Manufacture and sale of olive oil
Benalúa de las Villas (Granada)
www.sansebastiansca.org

SANTA MARÍA, SCA.

Crafting and packaging of olive oil
Pegalájar (Jaén)
www.aceitesoleobercho.com

SANTA TERESA, SAT.

Crafting and marketing of olive oil,
aceitunas and vinegar
Osuna (Sevilla)
www.1881.es

SOR ANGELA DE LA CRUZ, SCA.

Packaging and dressing of olives
Estepa (Sevilla)
www.aceitunasorangela.es

SOVENA ESPAÑA, SAU.

Manufacture and distribution of olive oil
Brenes (Sevilla)
www.sovenagroup.com

TORRES Y RIBELLES, SA.

Packaging and marketing of olive oil Dos
Dos Hermanas (Sevilla)
www.torresyribelles.com

UNIÓN DE ÚBEDA, SCA.

Manufacture and packaging of olive oil
Úbeda (Jaén)
www.unioliva.com

**Manufacture, processing and handling of
fruits and vegetables****ACRENA, SAT.**

Manufacture and sale of fruits and
vegetables
El Ejido (Almería)
www.acrena.es

AGROEJIDO, SA.

Manufacture and marketing of fruits and
vegetables
El Ejido (Almería)
www.agroejido.com

AGROIRIS GRUPO.

Manufacture and marketing of fruits and
vegetables
El Ejido (Almería)
www.agroiris.com

AGROMOLINILLO, SCA.

Manufacture and distribution of red berries
Huelva
www.agromolinillo.es

AGRUPAEJIDO, SA.

Packaging, marketing and distribution of
fruits and vegetables
El Ejido (Almería)
www.agrupaejido.com

AGRUPAPULPÍ, SA.

Manufacture and marketing of fruit and
vegetable products
Pulpí (Almería)
www.agropulpi.com

AGRO SAN ISIDRO, SA.

Packaging and sale of vegetables
Campoverde (Almería)
www.agrosanisidro.com

ALCOAXARQUÍA, SL.

Manufacture and sale of tropical and citrus
fruits
Vélez Málaga (Málaga)
www.alcoaxarquia.com

BERRYNEST H-0023.

Manufacture and sale of red berries
Almonte (Huelva)
www.bionest.es

BIOSABOR, SAT.

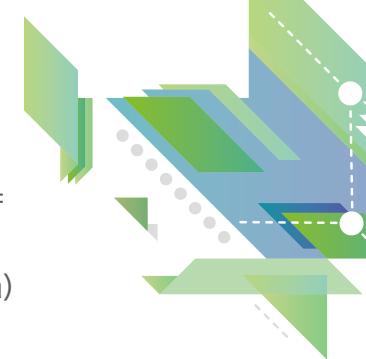
Manufacture and packaging of fruits and
vegetables
San Isidro de Níjar (Almería)
www.biosabor.com

CABASC, SCA.

Manufacture and marketing of fruits and
vegetables
Balanegra (Málaga)
www.cabasc.com

CAMPOS DE GRANADA, SAT.

Manufacture and sale of vegetables
Carchuna (Granada)
www.camposdegranada.com



CAMPOJOYMA, SLU.

Manufacture, transformation and sale of ecological vegetables
Campoverde (Almería)
www.campojoyma.com

CAPARRÓS NATURE, SL.

Manufacture, handling classification, packaging and marketing of fruit and vegetable products
El Aquián (Almería)
www.caparrosnature.com

COPROHNÍJAR, SCA.

Manufacture and marketing of fruit and vegetable products
San Isidro de Níjar (Almería)
www.copronijar.com

CORTIJO CUEVAS, SL.

Manufacture and sale of fruits
Lachar (Granada)
www.cortijocuevas.com

CUALIN QUALITY, SL.

Manufacture and wholesale of fruit and vegetable products
Antas (Almería)
www.cualinquality.com

Dcoop.

Multisectoral Agri-Foodstuffs Cooperative
Antequera (Málaga)
www.dcoop.es

EJIDOMAR, SCA.

Manufacture and sale of fruits and vegetables
El Ejido (Almería)
www.ejidomar.es

EXPORTACIONES AGRÍCOLAS

ALDENOR, SL.

Manufacture, handling, marketing and distribution of fruits and vegetables
El Ejido (Almería)
www.aldenor.es

FRESGARRIDO, SL.

Cultivation of strawberries, blueberries and blackberries
Palos de la Frontera (Huelva)
www.fresgarrido.es

FRES PALOS, SAT.

Cultivation and marketing of strawberries
Palos de la Frontera (Huelva)

FRUTAS BORJA, SL.

Manufacture and marketing of red berries
Almonte (Huelva)
www.frutasborja.es

FRUTAS MONTOSA.

Manufacture, processing and marketing of tropical fruits
Vélez Málaga (Málaga)
www.frutasmontosa.com

FULGENCIO SPA, SL.

Manufacture and wholesale of fruits and seeds, fresh vegetables
Carchuna (Granada)
www.fsagro.com

GRANADA LA PALMA, SCA.

Manufacture and marketing of fruits and vegetables
Carchuna (Granada)
www.granadalapalma.com

GRUPO ALSUR.

Manufacture of vegetable
Antequera (Málaga)
www.alsurvegetales.com

GRUPO LAS PALMERILLAS, SAT.

Manufacture and sale of red berries
Lepe (Huelva)
www.masiaciscar.es

GRUPO SAT ROYAL.

Manufacture and marketing of fruits La
La Rinconada (Sevilla)
www.royal.es

HERBEX IBERIA, SL.

Manufacture and sale of aromatic herbs, vegetables and flowers
El Ejido (Almería)
www.grupoherbex.com

HERMANOS DAZA PALMERO, SL.

Manufacture and marketing of fruit and vegetable products
El Ejido (Almería)
www.grupodictesa.com

HORTAMAR, SCA.

Manufacture, packaging and sale of fruit and vegetable products
Roquetas de Mar (Almería)
www.hortamar.es

HORTÍCOLA GUADALFEO, SL.

Manufacture and marketing of vegetables
Motril (Granada)
www.hguadalfedo.com

HORTOVENTAS.

Manufacturers, suppliers and distributor of fruit and vegetable products
Ventas de Zafarraya (Granada)
www.hortoventas.com

LAS HORTICHUELAS, SAT.

Manufacture, packaging and marketing of fruit and vegetable products
Las Hortichuelas (Almería)
www.hortichuelas.es

LAS MARISMAS DE LEBRIJA, SCA.

Processing, packaging and marketing of vegetables
Lebrija (Sevilla)
www.marismas.es

MOGALLA SAT H-0020.

Transformation, packaging and marketing of fruits and vegetables
Cartaya (Huelva)
www.mogalla.com

MOGUER CUNA DE PLATERO, SCA.

Manufacture and marketing of red berries
Moguer (Huelva)
www.cunadeplatero.com

MUELOLIVA Y MINERVA, SL.

Manufacture and sale of olive oil
Priego de Córdoba (Córdoba)
www.mueloliva.es

MUGIVERDE, SCA.

Fruit and Vegetable sector
El Ejido (Almería)
www.mugiverde.com

NATURE CHOICE, SAT.

Manufacture, marketing and distribution of fruit and vegetable products
El Ejido (Almería)
www.naturechoice-sat.com

NUESTRA SEÑORA DE LA BELLA, SCA.

Manufacture and marketing of Lepe produced fruits
Lepe
www.cobella.es

PEREGRÍN 9989, SAT.

Manufacture and marketing of fruits and vegetables
Pulpí (Almería)
www.peregrin.es

PROCAM, SCA.

Wholesale of fresh fruits and vegetables
Motril (Granada)
www.procamsca.com

SAN ISIDRO LABRADOR, SCA.

Manufacture, transformation and sale of fruit and vegetable products
El Ejido (Almería)
www.copisi.es

SANTA MARÍA DE LA RÁBIDA, FRESÓN DE PALOS, SCA.

Manufacture and marketing of f of fruits
Palos de la frontera (Huelva)
www.fresondepalos.es

SUREXPORT COMPAÑÍA AGRARIA, SL.

Manufacture and marketing of fruits
Almonte (Huelva)
www.surexport.es

TIERRAS DEL CONDADO, SL.

Manufacture and exporting of strawberries and raspberries
Almonte (Huelva)
www.tierrasdelcondado.com



TROPICAL MILLENIUM, SL.

Manufacture and marketing of tropical fruits
Vélez Málaga (Málaga)
www.tropicalmillenium.com

TROPS SAT.

Manufacture and marketing of tropical fruits
Vélez Málaga (Málaga)
www.trops.es

UNICA FRESH.

Manufacture and marketing of fruits and vegetables
Almería
www.unicafresh.es

VICASOL, SCA.

Manufacture and sale of fruit and vegetable products
Vicar (Almería)
www.vicasol.es

VIVEROS LAS FRESAS, SL.

Cultivation and wholesale of plants and flowers
Vícar (Almería)
www.vlasfresas.com

VIVEROS SEVILLA, SA.

Cultivation and sale of plants
Brenes (Sevilla)
www.viverossevilla.com

Processing and preservation of meats. manufacture of meat products

ANTONIO ÁLVAREZ JAMONES, SL.
Drying and seasoning of hams
Trevelez (Granada)
www.antonioalvarezjamones.com

AVINATUR PRODUCTOS AVÍCOLAS, SL.

Manufacture and sale of chicken meat
El Viso del Alcor (Sevilla)
www.avinatur.es

BELLOTERRA DELICATESEM, SL.

Crafting of hams and charcuterie
Añora (Córdoba)
www.belloterra.es

CARLOTEÑA DE ASADOS, SL.

Manufacture of ready-made meat products for sale
La Carlota (Córdoba)
www.lacarlotena.com

CARNES PÉREZ Y SÁNCHEZ, SA.

Manufacture of charcuterie and cutting room
Córdoba
www.perezsanchez.com

CÁRNICAS COVIHER, SL.

Cattle slaughterhouse, preparing and preservation of meats and poultry incubation
Los Corrales (Sevilla)
www.coviher.com

CENTRO AVANZADO DE TRANSFORMACION AVICOLA, SA.

Crafting of meat-based products, marketing and distribution
Santa Fe (Granada)
www.grupoarenas.com

COVAP, SCA.

Manufacture, sale and distribution of dairy, meat-based and animal foodstuff products
Pozoblanco (Córdoba)
www.covap.es

CRISMONA, SA.

Manufacture of meat-based products
Doña Mencía (Córdoba)
www.crismona.com

EMBUTIDOS CARCHELEJO, SL.

Crafting of charcuterie and other meat-based products
Carchelejo (Jaén)
www.embutidoscarchelejo.es

EMBUTIDOS MORENO PLAZA, SA.

Crafting and sale of charcuterie and cured meats
Alhaurín el Grande (Málaga)
www.morenoplaza.es

FACCSA.

Cutting, packaging and conservation of meats
Cartama (Málaga)
www.faccsa.es

FAMADESA.

Meat Industry. Porcine.
Campanillas (Málaga)
www.famadesa.es

GRUPO AVISERRANO.

Meat Industry
El Viso del Alcor (Sevilla)
www.aviserrano.com

IBÉRICA DE BELLOTA, SA.

Crafting and distribution of products derived from pork
Villanueva de Córdoba (Córdoba)
www.ibesa.es

INDUSTRIAS CÁRNICAS DE BENAJOJÁN, SL.

Manufacture of charcuterie and cured meats. Porcine abattoir
Benaoján (Málaga)
www.icarben.com

JAMÓN DE JUVILES, SA.

Manufacture of meat products
Juviles (Granada)

JAMÓN JAROTE, SL.

Wholesale and retail sale of hams and charcuterie
Villanueva de Córdoba (Córdoba)
www.jamonjarote.es

JAMONES GRANADINOS, SA.

Drying and sale of hams
Baza (Granada)
www.jamonesgranadinos.com

JAMONES TARTESSOS.

Manufacture of hams and charcuterie
Huelva
www.jamonestartessos.com

JAMONES Y EMBUTIDOS MELGAR, SL.

Drying of hams, crafting d e
charcuterie and cheeses
Málaga
www.embutidosmelgar.com

JUAN JOSÉ SOLA RICCA, SAU.

Distribution of foodstuff products, cutting room and preparation of ready-made meals
Sevilla
www.solaricca.com

JOVI SERRANO.

Manufacture of meat products, marketing and distribution of other foodstuff products
El Viso del Alcor (Sevilla)

KAURA COPRODUCTS, SL

Transformation of meat products into fats and flours
Salteras (Sevilla)
www.kaura.es

MATADERO DE CUMBRES MAYORES, SA.

Slaughterhouse and cutting room for porcine cattle
Cumbres Mayores (Huelva)
www.mataderodecumbresmayores.com

MATADERO DEL SUR, SA.

Meat Industry
Salteras (Sevilla)
www.mataderodelsur.es

MATADEROS INDUSTRIALES SOLER, SA.

Slaughterhouse, factory of charcuterie and drying of hams
Cártama Estación (Málaga)
www.prolongo.es

MATADERO LA JABUGUEÑA, SL.

Slaughter and cutting of cattle
Jabugo (Huelva)
www.lajabuguena.com

MONTEALBOR ALIMENTACIÓN, SA.

Crafting of meat products
Alcalá de Guadaíra (Sevilla)
www.montealbor.com



PAVISO ALIMENTACIÓN, SL.

Cattle slaughter, preparation and preservation of meat and poultry incubation
El Viso del Alcor (Sevilla)
www.paviso.es

PAYÁN HERMANOS, SA.

Industrial poultry slaughterhouse and sale of meat
Maracena (Granada)
www.grupo-payan.com

PRECOCINADOS SIMON'S, SL.

Manufacture and distribution of meat products
Alcalá de Guadaíra (Sevilla)
www.simonsfood.net

PRECOCINADOS Y PRODUCTOS

ARTESANOS LA PERLA, SL.

Preparation of ready-made meat products
Córdoba
www.laperla.es

PROCAVI, SL.

Manufacture of turkey meat
Marchena (Sevilla)
www.procavi.es

SADA.

Manufacture and marketing of chicken meat
Alcalá de Guadaíra (Sevilla)

SIERRA DE JABUGO, SL.

Crafting of Iberian ham products
Jabugo (Huelva)
www.sierradejabugo.com

SIERRA DEL SILENCIO JABUGO, SAU.

Crafting of Iberian cured hams
Jabugo (Huelva)
www.sierradelsilencio.es

Processing, preservation and crafting of fish, shellfish and mollusc products

ALFOCAN, SA.

Manufacture of canned foods and products derived exclusively from river crabs
Isla Mayor (Sevilla)
www.alfocan.com

CONSERVAS CONCEPCIÓN HRMANOS AYAMONTE, SA.

Manufacture of fish-based canned foods
Ayamonte (Huelva)
www.conservasconcepcion.es

DIMAROSA.

Fishing and distribution of frozen shellfish
Palos de la Frontera (Huelva)
www.dimarosa.es

ECOMSA.

Crafting and sale of frozen fish and shellfish
Málaga
www.ecomsa.es

EMBUTIDOS MARINEROS SL.

Manufacture of fish-based canned foods and other marine products
Sanlúcar de Barrameda (Cádiz)
www.embumar.com

EMFACAR, SL.

Processing and wholesale of fish and pre-cooked products
Isla Mayor (Sevilla)
www.emfacar.com

ETNOMAYA, SA.

Manufacture of fish-based canned foods
Ayamonte (Huelva)

FLOR DE GARUM. GASTRONOMIA HISTORIA E INNOVACION SL.

Manufacture of fish-based canned foods
Cádiz

HARINAS DE ANDALUCIA, SL.

Manufacture of flour and fish oils
Tarifa (Cádiz)

INDUSTRIAL CONSERVERA DE TARIFA SL.

Manufacture y sale of fish-based canned foods
Tarifa (Cádiz)
www.conserveradetarifa.es

MARISCOS CASTELLAR, SL.

Crafting, sale and distribution of seafood products
Santisteban del Puerto (Jaén)
www.mariscoscastellar.com

MARISCOS DICA, SL.

Marketing of frozen fish and seafood
Huelva
www.mariscosdica.es

MOYSEAFOOD, SA.

Crafting and wholesale of fish, shellfish and other food products
El Puerto de Santa María (Cádiz)
www.moyseafood.com

PESCA Y SALAZONES DEL SUROESTE, SA.

Manufacture and wholesale of fish-based canned foods and salted fish products
Ayamonte (Huelva)
www.pesasur.com

PESCATUM ISLEÑA, SL.

Manufacture of fish-based canned foods, and other marine products
Isla Cristina (Huelva)
www.pescatun.es

PREDOMAR, SL.

Aquiculture, fattening of sea bream and sea bass for mariculture
Carboneras (Almería)
www.predomar.com

PROCOSUR ZONA FRANCA SL.

Manufacture and marketing of fish-based canned foods, molluscs and crustaceans
Cádiz

SALAZONES HERPAC, SL.

Manufacture of canned foods, salted and smoked fish products
Barbate (Cádiz)
www.herpac.com

SALAZONES JUAN RAMON ASENSIO SA.

Manufacture of fish-based canned foods
Huercal de Almería (Almería)
www.salazonesasensio.com

UBAGO GROUP

Crafting and sale of fish-based canned foods and salted fish
Camapanillas (Málaga)
www.ubagogroup.com

USISA

Manufacture of fish-based canned foods and salted fish
Isla Cristina (Huelva)
www.usisa.com

VENSY ESPAÑA, SA.

Manufacture of fish-based canned foods and other marine products
Málaga
www.vensy.es

WIND WING SOUTH SEA SL.

Manufacture of fish-based canned foods, molluscs and crustaceans
El Puerto de Santa María (Cádiz)

Bread, confectionary and edible pasta**ANDROS GRANADA, SL.**

Manufacture of cacao, chocolate and confectionary products
Granada
www.dhul.es

ARTESANOS MÉNDEZ, SA.

Manufacture of bread and fresh products for baking and cakemaking
Cañada Rosal (Sevilla)
www.artesanosmendez.com

CONFITERÍA FAMILIA RIVERO FERNÁNDEZ, SL.

Manufacture of Christmas sweets
Estepa (Sevilla)
www.ladespensadepalacio.com

BIMBO

Manufacture of bread, pastries and cakemaking products
Puente Genil (Córdoba)
<http://www.bimbo.es>



DULCES OLMEDO GARCÍA, SL.

Manufacture of sweets
Estepa (Sevilla)
www.lamuralla.es

E.MORENO, SLU.

Manufacture of Christmas sweet and other confectionary products
Estepa (Sevilla)
www.emoreno.com

GALVÁN FERNÁNDEZ HERMANOS, SL.

Manufacture trading of typical Christmas sweets and confectionary products
Estepa (Sevilla)
www.laestepena.com

FAPANYS, SA.

Manufacture of bread and fresh products for baking and cakemaking
Sevilla
www.polvillo.es

GRUPO ALIMENTARIO SANCHO MELERO.

Elaboración y venta de dulces
Antequera (Málaga)
www.incoansl.com

GRUPO GALLO.

Manufacture and distribution of edible pasta
El Carpio (Córdoba)
www.pastasgallo.es

HISPALENSE DE MASAS CONGELADAS, SL.

Manufacture, marketing and distribution of bakery and confectionary products.
Dos Hermanas (Sevilla)
www.pansur.com

INÉS ROSALES

Manufacture of biscuits and long-lasting bakery and confectionary products
Castilleja de la Cuesta (Sevilla)
www.inesrosales.com

LAS NAVAS CÁDIZ, SL.

Crafting of bakery, pastries and confectionary products
www.panaderialasnavas.com

MEMBRILLO EL QUIJOTE, SA.

Manufacture of sweets and vegetable preserves
Puente Genil (Córdoba)
www.quijotefood.com

MOLLETE SAN ROQUE, SA.

Crafting and marketing of bakery products
Antequera (Málaga)
www.mollete.com

MONDAT BAKER, SL.

Manufacture of bread, sweets and pastries
Monda (Málaga)
www.mondat.com

MORENO RUIZ HERMANOS, SL.

Crafting confectionary products
Estepa (Sevilla)
www.laaurora.es

PANADERIA BOLLERIA DEL ROSAL SL.

Manufacture of bread and fresh products for bakery and cake-making
www.panaderiadelerosal.com

PANIFICADORA BIGOPAN, SL.

Manufacture of pan and fresh products for bakery and cake-making
Jaén
www.bigopan.com

PANIFICADORA NIÑO DE ORO, SL.

Bread-making of all types including sliced, toasted cakes and pastries
Sanlúcar de Barrameda (Cádiz)
www.elninodeoro.es

PASTELERÍAS ISLA, SL.

Manufacture of confectionary and cakemaking products
Santa Fe (Granada)
www.pionono.com

PRODUCTOS MATA, SA.

Manufacture of biscuits and long-lasting bakery and confectionary products; vegetable preserves
Alcaudete (Jaén)
www.productosmata.com

SAN MARTIN DE PORRES, SL.

Manufacture and distribution of confectionary products and pastries
Écija (Sevilla)
www.smporres.com

SIRO JAÉN, SL.

Manufacture of galletas and long-lasting bakery and confectionary products
Jaén
www.gruposiro.com

Dairy Products**AGAMMA, SCA.**

Manufacture and sale of cheeses
Colmenar (Málaga)
www.agamma.es

CORSEVILLA, SCA.

Crafting of cheese, hams, charcuterie and animal feed
Cazalla de la Sierra
www.corsevilla.es

FROMANDAL, SA.

Manufacture of cheese and butter
Lebrija (Sevilla)

INDUSTRIAS LACTEAS DE GRANADA, SL.

Manufacture and sale of dairy products
Granada
www.compromisopuleva.es

LA IBENSE 1892, SL.

Ice-cream making
Jerez de la Frontera (Cádiz)
www.laibense1892.com

LACTALIS PULEVA, SL.

Manufacture and sale of milk, dairy and dietary products
Granada
www.lechepuleva.es

LÁCTEOS AGASUR, SCA.

Manufacture of cheeses
Málaga
www.quesoselpinsapo.com

LÁCTEOS CAPRINOS, SA.

Preparation of milk, cheeses and other dairy products
Campillo de Arenas (Jaén)
www.lacteoscaprinos.com

MONTERO ALIMENTACIÓN, SL.

Manufacture of dairy-based desserts
Málaga
www.monteroalimentacion.es

PENALVA ALIMENTACION, SA.

Crafting and sale of ice-creams
Churriana de la Vega (Granada)
www.nordwik.com

QUESERÍA DE LA SIERRA SUBBÉTICA, SL.

Manufacture and sale of cheeses and dairy products
Zuheros (Córdoba)
www.losbalanchar.es

QUESOS EL BOSQUEÑO, SL.

Manufacture and wholesale and retail sale of cheeses
El Bosque (Cádiz)
www.quesoselbosque.com

QUESOS LOS VAZQUEZ, SL.

Crafting of cheeses and dairy products
Castilleja del Campo (Sevilla)
www.losvazquez.com

QUESO PAYOYO, SL.

Manufacture of cheese
Villaluenga del Rosario (Cádiz)
www.payoyo.com

VEGA E HIJOS, SA.

Manufacture of cheeses
La Rinconada (Sevilla)
www.vegaehijos.com



Milling products

ARROZUA, SCA.

Cultivation, sale and distribution of rice
Isla Mayor (Sevilla)
www.arrozua.com

HARINAS SANCHEZ PALENCIA SL.

Manufacture and marketing of cereals and flours
Jerez de la Frontera (Cádiz)
www.harinassp.es

HARINERA LAS MERCEDES SA.

Manufacture of all types of flours
Pinos Puente (Granada)
www.harimersa.com

HERBA RICEMILLS, SLU.

Wholesale of rice and manufacture of other milling products
San Juan de Aznalfarache (Sevilla)
www.herba.es , www.ebrofoods.es

UNIÓN HARINERA, SL.

Manufacture and distribution of flour
Peligros (Granada)
www.unionharinera.com

Animal Feed

AGRÍCOLA GANADERA NUESTRA SEÑORA DE LA CABEZA, SCA.

Manufacture of products for farm animal feeding
Teba (Málaga)

ALIMENTACIÓN ANIMAL DEL SUR, SL.

Manufacture of products for farm animal feeding
Jerez de la Frontera (Cádiz)
www.alansur.com

ELABORADOS PIENSUR SL.

Manufacture of products for farm animal feeding
Alcalá del Río (Sevilla)
www.piensur.es

GANADERIA Y PIENSOS ANDALUCES SA.

Manufacture of products for farm animal feeding
Campillos (Málaga)
www.quesoselarquillo.com

GRANJA OTIVAR, SL.

Manufacture of products for domestic
Dos Hermanas (Sevilla)

GRUPO CONDE HINOJOSA, SL.

Manufacturer of animals feeds
Campillos (Málaga)
www.condehinojosa.com

NUESTRA SEÑORA DE LOS REMEDIOS-PICASAT, SCA.

Manufacture of products for farm animal feeding
Olvera (Cádiz)
www.remediospicasat.com

PIENSOS CARUSAN SL.

Manufacture of products for farm animal feeding
El Viso del Alcor (Sevilla)

PIENSOS GARLA SA.

Manufacture of products for farm animal feeding
Huércal-Overa (Almería)

Other products

AB MAURI FOOD, SA.

Manufacture of yeast and baking products
Córdoba
www.abmauri.com

ACEITES Y SALSAS MUELA, SL.

Crafting, packaging and marketing of spices, sauces and condiments
Carcabuey (Córdoba)

ALIMENTOS DEL ALJARAFE, SL.

Crafting, packaging and marketing of dried fruits
Sanlúcar la Mayor (Sevilla)
www.frutossecosreyes.es

ALMENDRAS LÓPEZ, SA.

Manufacture and marketing of almonds and flours
Albuñol (Granada)
www.almendraslopez.com

ALMENDRAS UTRERA, SL.

Manufacture, packaging and sale of almonds
Albanchez (Almería)

ANDALUZA DE CAFÉS, SA.

Crafting of coffees, teas and infusions
Sevilla
www.catunambu.es

APERITIVOS MATARILE, SA.

Crafting of starters
Marchena (Sevilla)

AZÚCAR LUTOR, SCA.

Packaging and sale of sugars and sweeteners
Caniles (Granada)
www.azucarlutor.com

CAFES CUMBAL, SL.

Production of coffee, tea and coffee substitutes
Monachil (Granada)
www.cafescumbal.com

CALCONUT, SL.

Importing, exporting and processing of dried fruits, desiccated fruits and spices
Pulpí (Almería)
www.calconut.com

COMERANDALUS, SL.

Creation of sauces
Palma del Río (Córdoba)
www.arteoliva.com

CONGELADOS LA RED 2000, SL.

Manufacture of ready-made and frozen meals
Alcalá de Guadaíra (Sevilla)
www.pescadoycongelados.es

DAREGAL IBÉRICA, SL.

Processing of frozen aromatic herbs
Santaella (Córdoba)
www.daregal.fr

DUJONKA, SL.

Manufacture of ready-made meals
Dos Hermanas (Sevilla)

ELABORACIÓN DE PIZZAS AL FORN DE PEDRA, SL.

Manufacture of ready-made dishes and meals
Roquetas de Mar (Almería)

ELABORADOS ARTESANOS ROGAM, SL.

Production of other foodstuff products
Los Corrales (Sevilla)

GLOBAL COFFEE INDUSTRIES SOCIEDAD, SA.

Production of coffee, tea and coffee substitutes
Dos Hermanas (Sevilla)
www.globalcoffeeindustries.com

GRUPO ALMENDRAS FRANCISCO MORALES.

Manufacture and marketing of almonds
Priego de Córdoba (Córdoba)
www.almendrasfmorales.com

GRUPO ALMENSUR.

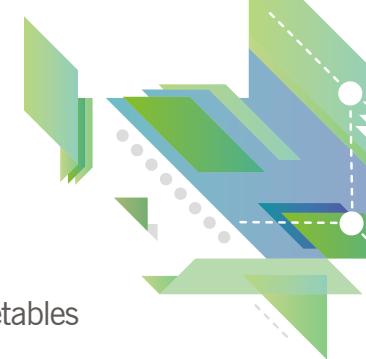
Processing and sale of dried fruits
Cártama (Málaga)
www.almensur.com

JOCUSI HISPANIA, SL.

Sugar industry
(Almería)
www.jocusi.es

PRECOCINADOS POZO, SA.

Production of pre-cooked foodstuffs
Puente Genil (Córdoba)
www.precocinadospozo.es



PROVEEDORA ANDALUZA, SL.

Crafting of spices, sauces and condiments
Sevilla
www.proanda.com

ROBIS, SL.

Manufacture of homogenised ready-made and dietary foodstuffs
Albolote (Granada)
www.robis.es

SAGACOR, SL.

Crafting, packaging and marketing of dried fruits
Córdoba
www.sagacor.com

SALSAS DE SALTERAS, SL.

Crafting of sauces, gazpacho and salmorejo
Dos Hermanas (Sevilla)
www.salsasdesalteras.com

SEVILLANA DE CAFE SL.

Production of coffee, tea and coffee substitutes
Alcalá de Guadaíra (Sevilla)
www.cafeab.com

TAZOR, SL.

Production of coffee, tea and coffee substitutes
Vélez-Málaga (Málaga)
www.tamazor.com

TOSTADERO SOL DE ALBA, SA.

Manufacture, Manufacture and packaging of dried fruits
Peligros (Granada)
www.soldealba.com

VINAGRERÍA LA ANDALUZA, SL.

Crafting, packaging and marketing of vinegar
Jerez de la Frontera (Cádiz)

Marketing, distribution and supermarkets

AGROSOL EXPORT, SL.

Distribution and sale of vegetables
Roquetas de Mar (Almería)
www.agrossolexport.com

AGRUPAADRA, SA.

Marketing of fruits and vegetables
Adra (Almería)
www.agrupaadra.com

ALFRUT, SAT H-0011.

Wholesale greengrocer
Lepe (Huelva)
www.alfrut.com

ALHÓNDIGA LA UNIÓN, SA.

Wholesale greengrocer.
El Ejido (Almería)
www.alhondigalaunion.es

ALMAZARAS DE LA SUBBÉTICA, SLU.

Wholesale of olive oil
Carcabuey (Córdoba)
www.almazarasdelasubbetica.com

ALIMENTACIÓN Y BEBIDAS DÍAZ CADENAS, SL.

Wholesale and retail sale of foodstuffs and beverages
La Lanteljuela (Sevilla)
www.diazcadenas.com

ALMACENES CARMONA, SA.

Distribution of foodstuffs and beverages
Antequera (Málaga)
www.abasthosur.es

ALSARA.

Distribution of foodstuffs
Córdoba
www.alsara.es

ASPRODIBE, SCA.

Wholesale distribution of foodstuffs and beverages
Valderrubio (Granada)
www.asprodibe.es

AXAFRUIT.

Wholesale of tropical and citrus fruits
Benamargosa (Málaga)
www.axarfruit.es

BEBIDAS CÓRDOBA, SL.

Wholesale of beverages and liquors
Puente Genil
(Córdoba)
www.bebidascordoba.com

CADECAP.

Wholesale of cereals, flours and sub-products
El Viso del Alcor (Sevilla)
www.cadecap.com

CARO RUIZ, SA.

Wholesale foodstuffs
Palma del Río (Córdoba)
www.caroruiz.com

CAMPIÑA VERDE ECOSOL, SL.

Marketing of ecological ultra-fresh products
Córdoba
www.campinaverde.com

CASH LEPE, SA.

Wholesale and retail sale of foodstuffs
Lepe (Huelva)
www.supermercadoseljamón.com

CERVEZAS VICTORIA MÁLAGA, SL.

Wholesale of beverages Malaga
Málaga
www.damm.es

COALIMENT ANDALUCÍA, SL.

Wholesale foodstuffs and household goods
Loja (Granada)
www.comerco.es

COCEREALES, SCA

Sales of cereals, oleaginous and protein-based products
Sevilla
www.cocereales.com

COMERCIAL PIEDRA TRUJILLO, SLU.

Distribution of foodstuffs
Córdoba
www.comercialpiedra.com

CONDADO DE HUELVA, SAT.

Wholesale fresh fruits and vegetables
Rociana del Condado (Huelva)
www.satcondado.es

CONFISUR.

Wholesale and retail sale of foodstuffs
Sevilla
www.confisur.es

CONGELADOS APOLO, SL.

Wholesale fish, other fishing and aquaculture products
Loja (Granada)
www.mariscosapolo.com

CONGELADOS LENDÍNEZ, SL.

Wholesale fish, other fishing and aquaculture products
Linares (Jaén)
www.congeladoslendinez.es

COOPHUELVA, SCA.

Marketing of red berries
Lucena del Puerto (Huelva)
www.coophuelva.es

COSTASOL DE HIPERMERCADOS, SLU.

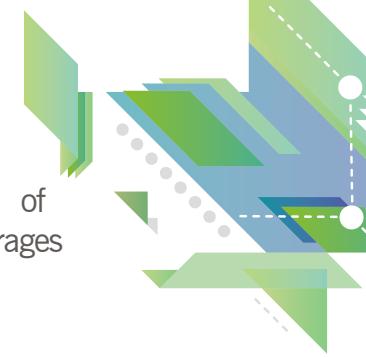
Retail sale of foodstuff products in specialist stores
Estepona (Málaga)

DEZA CALIDAD, SA.

Retail sale of foodstuff products and beverages in non-specialist stores
Córdoba
www.dezacalidad.es

DISTRIBUCIONES PLATA GRANADA, SL.

Distribution and wholesale of foodstuff products
Ogíjares (Granada)
www.distribucionesplata.com



DRINKS SOL, SL.

Wholesale of beverages
Málaga
www.disbesa.com

ENRIQUE MONTALBÁN, SL.

Wholesale of flowers and plants
Chipiona (Cádiz)
www.enriquemontalban.com

EUROBERRY, SA.

Sale of red berries Seville
Sevilla
www.euroberry.com

EUROCASTELL CAÑA, SL.

Sale of fruit and vegetable products Castell de Ferro (Granada)
www.eurocastell.com

EVOOIL 7, SL.

Wholesale of dairy products, edible oils and fats
Córdoba
www.esenciadecordoba.com

FRUTAS ESCOBI, SL.

Marketing of fruits and vegetables
La Mojonera (Almería)
www.escobi.es

FRUTAS LOS CURSOS, SL.

Wholesale of fruits and vegetables
Almuñécar (Granada)
www.frutasloscursos.com

FRUTAS RAFAEL MANZANO E HIJOS, SL.

Wholesale of fruits
Salobreña (Granada)
www.frutasmanzano.com

GRUPO AGROPONIENTE.

Marketing of fruits and vegetables
El Ejido (Almería)
www.grupoagroponiente.com

GRUPO ALIPENSA-ASERSA.

Sales of foodstuffs
Montilla (Córdoba)
www.asersa.com

GRUPO BAREA

Non-specialist wholesale of foodstuff products and beverages
Sevilla
www.grupobarea.es

GRUPO BARQUERO HERMANOS, SA.

Wholesale of cereals and animal feed
Almargen (Málaga)
www.barquierohermanos.com

GRUPO CENTRO SUR AGROINVER.

Wholesale of fresh fruits and vegetables
Huétor Tajar (Granada)
www.centro-sur.es

GRUPO COVIRÁN.

Distribution of foodstuff and household products
Atarfe (Granada)
www.coviran.es

GRUPO HERMANOS GALLEG O FERNÁNDEZ, SL.

Wholesale greengrocer
Alahurín de la Torre (Málaga)
www.hermanosgallego.es

GRUPO INTERÓLEO.

Wholesale of dairy products, eggs, edible oils and fats
Mengíbar (Jaén)
www.interoleo.com

GRUPO MAS.

Sale of foodstuff and household products
Dos Hermanas (Sevilla)
www.supermercadosgrupomas.com

GRUPO VIÑAFIEL.

Wholesale of wines and liquors
Salteras (Sevilla)
www.viñafiel.com

GUADEX, SL.

Wholesale of fruits

Palma del Río (Córdoba)

www.guadex.es

HORTOFRUTÍCOLA COSTA DE ALMERÍA, SL.

Wholesale greengrocer

Roquetas de Mar (Almería)

www.hcostadealmeria.es

HORTOFRUTÍCOLA LA ÑECA, SL.

Wholesale greengrocer

El Ejido (Almería)

www.laneca.com

HORTOFRUTÍCOLA MABE, SAT.

Comercio al por mayor de frutas y hortalizas

El Ejido (Almería)

www.mabesat.com

INDASOL, SAT.

Wholesale greengrocer

El Ejido (Almería)

www.indasol.es

INTERÓLEO PICUAL JAÉN, SA.

Wholesale of olive oil, leche, dairy products, honey and edible fats

Mengíbar (Jaén)

www.interoleo.com

INTERSUR 2011, SA.

Wholesale of potatoes

La Rinconada (Sevilla)

www.intersur.es

LEGUMBRES SELECTAS SIERRA DE LAS NIEVES, SL.

Wholesale of legumes

Atarfe (Granada)

www.legumbressierranevada.com

LUIS PIÑA, SL.

Wholesale and retail sale of canned foods and foodstuffs, beverages and household products

Andújar (Jaén)

www.super-masymas.com

MARTIMAR.

Wholesale greengrocer and distributor

Sevilla

www.martimar.com

MERCADOS DEL PONIENTE, SA.

Wholesale greengrocer and of flowers

El Ejido (Almería)

MIGUEL GARCÍA SÁNCHEZ E HIJOS, SA

Marketing of fruits and vegetables

Motril (Granada)

www.grupolacana.com

MONTIVEL, SAT.

Wholesale greengrocer

Berja (Almería)

www.montivel.com

MOYSEAFOOD, SA.

Wholesale of fish, other fishing and aquiculture products

El Puerto de Santa María (Cádiz)

www.moyseafood.com

NICOLÁS GIL BLANCO, SL

Wholesale and retail sale of meat products

Sevilla

www.nicolasgilblancosl.com

ONI FOODS OVERSEAS, SL.

Sale of frozen meats and fish

Málaga

www.onifoods.com

ONUBAFRUIT, SCA.

Wholesale of fresh fruit and vegetable

Huelva

www.onubafruit.com

PESCADOS MONTALBÁN, SL.

Wholesale of fresh fish and seafood

Granada

www.pmONTALBAN.com



PIENSOS Y MASCOTAS, SL.

Wholesale of animal feed and cereals s
www.piensoymascotas.com

PLINARES, SL.

Distribution of frozen products
Algeciras (Cádiz)
www.congeladosllinares.es

PRIMAFLOR.

Wholesale greengrocer
Pulpí (Almería)
www.primaflor.com

QUESUR, SA.

Wholesale of cheeses and dairy products
Málaga
www.quesur.com

REYES GUTIÉRREZ, SL.

Marketing and distribution of tropical fruit
Vélez Málaga (Málaga)
www.reyesgutierrez.com

ROMÁN Y MARTOS, SL.

Foodstuff distribution
Campanillas (Málaga)
www.romanymartos.com

RUIZ GALÁN, SL.

Foodstuff distribution (supermarkets)
La Línea de la Concepción (Cádiz)
www.supermercadosruizgalan.com

SANDEMAN JEREZ, SL.

Wholesale of beverages including
sherry wines, vinegar and brandy
Jerez de la Frontera
www.sandeman.eu

SERODYS.

Wholesale and retail sale of beverages and
foodstuffs
Puerto Real (Cádiz)
www.serodys.com

SIGFRIDO FRUIT, SLU.

Wholesale of tropical fruit
Vélez Málaga (Málaga)
www.sigfridofruit.com

SÍNTESIS, SAT.

Marketing of fresh fruit
Sevilla
www.satsintesis.com

SUPERMERCADOS CODI, SL.

Foodstuff distribution
Dos Hermanas (Sevilla)
www.supermercadoscodi.es

SUPERCARMELA.

Foodstuff distribution, supermarkets
Arcos de la Frontera (Cádiz)
www.supercarmela.com

SURBERRY, SL.

Wholesale of red berries
Huelva
www.surberry.com

