



SNAPSHOT OF OPPORTUNITIES IN SPAIN'S PULSE SECTOR



MARKET TRENDS

SECOND-LARGEST CONSUMER OF PULSES IN THE EU.

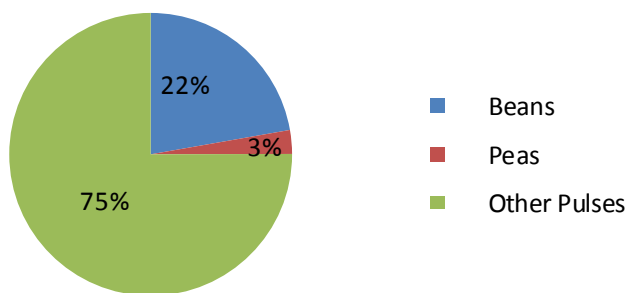
- Pulses are an affordable food staple used in several Spanish dishes.
- Beans, peas, and lentils are an important part of traditional Spanish dishes.
- Low prices of fresh pulses are popular during low economic periods.
- Leading pulse players are investing in the production of innovative processed pulse products.
- Further promotional activities by associations and manufacturers are expected to increase pulse consumption, especially among Vegetarians.
- Spaniards are looking for healthier lifestyles and higher quality standards in their cuisine.
- High and upper middle class households and/or households without children consume the most pulses in Spain.

PULSES TRADE

- Spain is the third-largest importer of pulses in the European Union (EU), with imports worth US\$207.5 million in 2016.
- Canada is Spain's second-largest supplier of pulses in the world worth US\$43.8 million in 2016.
- 86% of Spain's pulse imports were lentils, chickpeas, and kidney beans. Combined import value of these products was worth US\$178.8 million in 2016.
- Spain relies on imports to meet consumption demand for dried pulses.

HISTORIC AND FORECAST RETAIL SALES

Chick peas, cow peas, and lentils made up 75% of Spain's pulses volume sales in 2016



Retail made up 62% of pulse sales in Spain, followed by institutions with 20%, and food services with 18%.

- In 2016, pulses sales were worth US\$207.1 million in Spain, a slight decline of 1% from 2015.
- Peas saw the most significant growth with retail sales reaching to US\$8 million in 2016 a 3% increase from 2015.
- Peas saw a 1.4% growth rate from 2012 to 2016.

Frozen shelf-stable peas are expected to see a 4% period growth in volume sales and 2.2% in retail sales from 2017-2021.

- Beans are expected to see a period growth of 2% from 2017 to 2021.

Note: Other pulses include chick pea, cow pea, lentils, etc.


PULSES USED AS AN INGREDIENT

- From 2006 to 2016, 3,539 pulse products were launched in Spain.
- Top product launch categories were **vegetables, prepared meals, and meat substitutes.**



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FACTORS FOR CONSIDERATION	RECOMMENDATION FOR ENTRY
<ul style="list-style-type: none"> • The European Union (EU) is a common market and imports must comply with applicable EU regulations. Custom duties are applied to all products and rates depend on a variety of factors. • Value-added tax, insurance, and freight cost should be included in import value. • Imports from a third country must clearly identify the country of origin. • The Comprehensive Economic and Trade Agreement (CETA) between Canada and the EU will reduce tariffs and some Canadian processed pulses products will be allowed to enter the EU duty-free. For more details, please consult our CETA page where you will find a Factsheet on processed pulses. 	<ul style="list-style-type: none"> • Develop a good understanding of regulations and procedures to make sure your products are compliant with them. • Consult with your importer to be aware of all the requirements applicable in the market you want to reach. • Follow import regulations to avoid imports being detained for non-compliances. • Develop a clear market strategy and an extended knowledge of the targeted market prior to entry. • Other requirements may apply (e.g., labelling, packaging, additives allowed) so make sure you are aware of them.
<p>HOW WE CAN HELP We offer multiple programs and services to help you achieve your international business goals, such as the Agri-Food Trade Service, AgriMarketing Program, and Canada Brand.</p> <p>International Trade Commissioners are also an excellent point of contact for export advice and can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions, and local business contacts.</p> <p style="text-align: center;">HAVE WE PIQUED YOUR INTEREST?</p> <p style="text-align: center;">For more information on opportunities in Spain or to join our distribution list, make suggestions, or request more information, contact Single Window at MAS-SAM@agr.gc.ca.</p>	
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