Experience gained from three multi-product programs in third countries (USA, Brazil and Japan; USA and Canada; and India)

Seminar: “New EU Promotion Policy for Agri-Food Products”

Brussels

22 October 2015
FIAB & the Spanish Food & Drink Industry
The Spanish Food & Drinks Industry Federation (FIAB) established in 1977 whose aim is to represent the Spanish food and beverage industry to national and international authorities.

Currently, we are composed by **47 industry associations** and approximately **4,000 companies**.
OBJECTIVE AT INTERNATIONAL LEVEL

- SINCE 1998, FIAB HAS BEEN ACTIVE IN THE SUPPORT OF SPANISH FOOD COMPANIES IN THEIR EFFORTS TO INCREASE THEIR SALES ABROAD
INTERNATIONAL ACTIVITIES: Spanish Pavilions in International Trade shows

“FIAB & ICEX (SPANISH INSTITUTE OF FOREIGN TRADE) JOINTLY ORGANIZE THE SPANISH PARTICIPATION IN MANY TRADE SHOWS, BEING PRESENT IN THE MOST IMPORTANT MARKETS”

- PRODEXPO MOSCOW
- SUMMER FANCY FOOD
- SIAL SHANGHAI
- FOODEX TOKYO
- FOOD & HOTEL ASIA
- WORLD FOOD MOSCOW
- SIAL PARIS
- GULFOOD
- PLMA USA
- SIAL BRASIL
- EXPO ANTAD
- HOFEX
- ALIMENTARIA MÉXICO
- SIAL CHINA
- SPECIALITY FOOD FAIR
- PLMA AMSTERDAM
- TUTO FOOD
- SIRHA
- IFE LONDON
- FOOD INGREDIENTS EUROPE
- WINTER FANCY FOOD
- FOOD & HOTEL SEOUL

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INTERNATIONAL ACTIVITIES: point of sale promotions - Spain Week

THEY REPRESENT A SET OF INTERNATIONAL PROMOTIONS CO-ORGANIZED BY FIAB AND AN INTERNATIONAL DISTRIBUTION CHAIN, IN WHOSE STORES A SPANISH FAIR IS ORGANIZED WITH THE PARTICIPATION OF SOME SPANISH COMPANIES. THESE PROMOTIONS ARE HELD IN SEVERAL STORES DURING A SPECIFIC PERIOD OF TIME.

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INTERNATIONAL ACTIVITIES: Spain Experience Program

A SERIES OF VISITS FROM FOOD CATEGORY OR SPECIALIST BUYERS TO SOME SELECTED FACTORIES IN SPAIN ARE SCHEDULED, IN ORDER TO PROVIDE A BETTER UNDERSTANDING OF TODAY`S SPANISH FOOD AND DRINK INDUSTRY IN TERMS OF QUALITY OF THEIR PRODUCTS, TECHNOLOGY, TRADITION AND CONSTANT INNOVATION

THE MAIN GOAL OF THIS PROGRAM IS TO IMPROVE COMMERCIAL RELATIONS BETWEEN SPANISH FOOD AND DRINK INDUSTRIES AND BUYERS FROM SELECTED DISTRIBUTION CHAINS
INTERNATIONAL ACTIVITIES: Alimentaria F&D

Business Meetings

High rated activity by both, exhibitors and buyers

3,800 Exhibitors

95,000 sqm of exhibition space

140 Countries Represented

140,000 Visitors

8,000 Business meetings

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## Spanish Agri-Food exports compared to other EU members

### Ranking Agri-food exporters in the EU

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<tr>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>NETHERLANDS</td>
<td>81.113</td>
<td>0.7%</td>
<td>5.6%</td>
<td>5.1%</td>
<td>4.9%</td>
</tr>
<tr>
<td>2</td>
<td>GERMANY</td>
<td>69.007</td>
<td>1.7%</td>
<td>6.5%</td>
<td>7.4%</td>
<td>7.0%</td>
</tr>
<tr>
<td>3</td>
<td>FRANCE</td>
<td>58.617</td>
<td>-2.8%</td>
<td>5.6%</td>
<td>4.2%</td>
<td>3.3%</td>
</tr>
<tr>
<td>4</td>
<td>SPAIN</td>
<td>38.269</td>
<td>3.7%</td>
<td>7.7%</td>
<td>5.8%</td>
<td>6.1%</td>
</tr>
<tr>
<td>5</td>
<td>BELGIUM</td>
<td>34.779</td>
<td>2.1%</td>
<td>5.0%</td>
<td>4.8%</td>
<td>4.7%</td>
</tr>
<tr>
<td>6</td>
<td>ITALY</td>
<td>34.240</td>
<td>2.5%</td>
<td>6.5%</td>
<td>5.6%</td>
<td>5.4%</td>
</tr>
<tr>
<td>7</td>
<td>UNITED KINGDOM</td>
<td>25.053</td>
<td>6.1%</td>
<td>7.9%</td>
<td>4.5%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Source: Euro Datacomex own development. Millions of euros. Average annual growth rates

**EUROPEAN FOOD, TASTE HEALTH QUALITY**
- **1999-2002** Spain
  - POINT OF SALE PROMOTIONS IN USA, BRAZIL AND JAPAN

**EUROPEAN GOURMET PRODUCTS**
- **2006-2008**
  - FIRST MULTICOUNTRY & MULTIPRODUCT PROGRAM IN USA & CANADA
  - PARTICIPANT COUNTRIES: SPAIN, FRANCE, ITALY & PORTUGAL

**EUROPEAN QUALITY FOOD: EATING WITH YOUR FIVE SENSES**
- **2012 -2015** Spain
  - PROMOTION PROGRAM IN INDIA RECENTLY CONCLUDED

Additionally, FIAB has taken part in fairs and other activities organized by the European Union (South Korea, Vietnam, India...)

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<table>
<thead>
<tr>
<th>ADVANTAGES</th>
<th>DISADVANTAGES/CHALLENGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• GETTING USED TO WITH OPERATIONAL PROGRAMS IN THE FRAME OF EU REGULATION</td>
<td>• HEAVY ADMINISTRATIVE PROCEDURES</td>
</tr>
<tr>
<td>• GOOD EFFECTIVENESS OF THE EUROPEAN MESSAGE IN TARGETED MARKETS</td>
<td>• CONTRA DICTION EUROPEAN MESSAGE VS SPANISH ORIGIN OF THE PRODUCTS</td>
</tr>
<tr>
<td>• HIGH CO-FINANCING</td>
<td>• RESTRICTION ON PARTICIPATING PRODUCTS</td>
</tr>
</tbody>
</table>

**EUROPEAN FOOD, TASTE HEALTH QUALITY**

**WE FEED THE FUTURE**
# European Gourmet Products

## Advantages

<table>
<thead>
<tr>
<th>Advantages</th>
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<tbody>
<tr>
<td>• PROYECT WITH REAL EUROPEAN DIMENSION</td>
</tr>
<tr>
<td>• HIGH IMPACT: BIG SUCCESS AMONG OPERATORS IN TARGETED MARKETS</td>
</tr>
<tr>
<td>• SATISFACTION AMONG PARTICIPATING COMPANIES &amp; SECTORS</td>
</tr>
<tr>
<td>• HIGH CO-FINANCING</td>
</tr>
</tbody>
</table>

## Disadvantages/Challenges

<table>
<thead>
<tr>
<th>Disadvantages/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ADMINISTRATIVE PROCEDURES X4 or X8</td>
</tr>
<tr>
<td>• DIFFICULTIES IN THE USE OF BRANDS</td>
</tr>
<tr>
<td>• RESTRICTION ON PARTICIPATING PRODUCTS</td>
</tr>
</tbody>
</table>

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**We Feed The Future**
## EUROPEAN QUALITY FOOD: EATING WITH YOUR FIVE SENSES

<table>
<thead>
<tr>
<th>ADVANTAGES</th>
<th>DISADVANTAGES/CHALLENGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• CHARACTERISTICS OF THE MARKET WITH LITTLE KNOWLEDGE OF EUROPEAN PRODUCTS MAKES MORE SUITABLE A GENERIC PROGRAM</td>
<td>• PROJECT WITH LESS IMPACT / LOWER RATINGS AMONG COMPANIES AND AGENTS IN COUNTRY</td>
</tr>
<tr>
<td>• HIGH CO-FINANCING</td>
<td>• THE DEVELOPMENT OF THE INDIAN MARKET’S EXPECTATION HAS NOT BEEN ACCOMPLISHED</td>
</tr>
</tbody>
</table>
EUROPEAN AGRI-FOOD PROMOTION PROGRAMS: INDIA (I)

EUROPEAN QUALITY FOOD: EATING WITH YOUR FIVE SENSES

MULTIPRODUCT ONE COUNTRY PROGRAMME IN INDIA -2012-15-

TOTAL BUDGET (APPROX.) → 1,200,000 €

OBJECTIVES

- TO CREATE A SOLID IMAGE OF THE BRAND NAME “EUROPE” BASED ON QUALITY, FOOD, SAFETY AND INNOVATION INCREASING CONSUMER AWARENESS OF EUROPEAN PRODUCTS
- INCREASE CONSUMER DESIRE FOR EUROPEAN PRODUCTS THROUGH MESSAGES RELATED TO THE EMOTIONAL QUALITIES ATTRIBUTED TO THEM AS TRADITIONAL, EXCLUSIVE AND EXQUISITE
- INCREASE AWARENESS OF THE DISTRIBUTION CHANNEL (IMPORTERS, RESTAURANTS AND WHOLESALE AND RETAIL DISTRIBUTION) IN RELATION TO EUROPEAN PRODUCTS

CONTEXT

- FIAB BOOSTED IN 2008 THE EXECUTION OF A THOROUGH STRATEGIC STUDY TO DETECT OPPORTUNITIES AND THREATS OF THE INDIAN MARKET FOR SPANISH AGRI-FOOD PRODUCTS → “PLAN INDIA” WITH THE COLLABORATION OF ICEX AND REGIONAL PROMOTION BODIES

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EUROPEAN AGRI-FOOD PROMOTION PROGRAMS: INDIA (II)

TARGET GROUPS

• END CONSUMERS

• PROFESSIONALS OF THE SECTOR: INSTITUTIONS, IMPORTERS, DISTRIBUTORS, FOOD

SERVICE CHANNEL

ACTIVITIES

• 1.- EUROPEAN PAVILION AT ANNAPOORNA WORLD OF FOOD

• 2.- TRADE MISSION TO SPAIN

• 3.- SPANISH COOK BOOK

• 4.- ADVERTISING CAMPAIGN

• 5.- EUROPEAN WELLNESS PARADE

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THANK YOU