

Sector-specific opportunities in Spain

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Watch DIT's videos for more information about opportunities in Spain, at: www.youtube.com/playlist?list=PLW9Q9i8L1YhU2QkDDIznvyvahRiVvqdw

Spain has a highly diversified economy and can offer opportunities in many sectors:

Agriculture

Agriculture remains important to the Spanish economy making up 15.5% of total exports. There are still many areas in Spain's agriculture sector where processes could be improved. Farming practices are expected to change in the next five to ten years as many farms are passed to younger generations to manage.

Technology and new products will be required to:

- improve production methods
- address traceability
- make farming more sustainable

Opportunities include:

- fertilisers and pesticides for organic farming
- quick diagnostic kits for use in meat production eg salmonella
- water purification products
- vaccines for illnesses such as Blue Tongue

Contact Senior Trade Advisers shona.brown@fco.gov.uk or beatriz.asua@fco.gov.uk for more information on opportunities in Agritechnology.

[Source: DIT/gov.uk (Apr 2016)]

Defence and security

The Spanish military have recently adopted a more centralised approach to planning and procurement programmes. They have widened the remit of the Armaments and Material Directorate (DGAM). DGAM are setting up specific programmes to cover the gradual acquisition of:

- 8x8 vehicles
- F110-class frigates
- tanker aircraft
- Remotely Piloted Aircraft (RPA)
- cyber

The UK security industry enjoys a great reputation in Spain which counts amongst its top export destinations in this sector. There is still room for growth. Opportunities for UK suppliers include:

- cyber security particularly for the private sector
- protection of critical national infrastructure (physical protection as well as cyber)
- smart border technologies
- riot police equipment

Contact the UK Export Control Organisation (ECO) to check your goods are meeting legal requirements for export. See: www.gov.uk/government/organisations/export-control-organisation

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[Source: DIT/gov.uk (Apr 2016)]

Education

The market for British education and related products is huge in Spain.

Spain hosts the second largest number of British schools outside the UK in the world. Many are members of the National Association of British Schools in Spain (NABSS). All products and services which are successful in UK schools potentially could do well in Spain's international schools sector. See: www.nabss.org

Spain has a firm political commitment to maintain and expand a state bilingual education programme, potentially offering opportunities for UK providers.

Over 100,000 Spanish adults and children visit the UK to study English every year. UK language schools, boarding schools and other study centres generally work through Spanish study abroad agents, the most reliable of which are members of www.aseproce.es.

Over 9,000 Spaniards chose higher education in the UK in 2014. Spain is one of the ten top sending countries and demand is growing.

Spain still has a significant skills gap in English language proficiency, ranking near the bottom of the EU. As professional careers require advanced proficiency the English Language Training (ELT) market is huge for learners of all ages. Speciality areas such as business English are highly competitive. New entrants must have a brand name and/or a Unique Selling Point (USP).

Demand for special needs products is rising in both the education and healthcare sectors. It is currently a relatively underdeveloped sector in Spain. Almost one third of children with disabilities attend regular schools without dedicated support.

Corporate training also offers opportunities to UK providers.

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[Source: DIT/gov.uk (Apr 2016)]

Energy

Spain's 2014 to 2020 National Energy Efficiency Action Plan aims to reduce consumption 26.4% by 2020. National and regional government incentives support this objective.

Spain is still the 4th largest generator of wind energy in the world despite recent low investment. It is the 2nd source of power generation meeting 20.3% of demand after nuclear (22%). Between 4,553 and 6,473 MW of new wind energy capacity need to be installed for Spain to reach its 2020 renewable energy target.

The Basque Country leads Spain in the design and manufacture of power generation and electrical distribution equipment, including three of Spain's four wind turbine builders. The sector is made up of some 350 companies, and there are supply chain and collaboration opportunities for UK companies in wind and marine.

There are opportunities for UK companies in:

- Latin America through Spain's global energy companies: Iberdrola (owners of Scottish Power); Endesa (owned by Enel); Repsol and Gas Natural Fenosa
- energy efficiency in buildings, smart metering and smart grid solutions/lighting
- energy storage
- innovative carbon reduction solutions
- nuclear (construction of a temporary centralised storage facility for spent fuel)
- wind turbine repowering
- collaboration on EU Horizon 2020 energy projects (The EU Framework Programme for Research and Innovation). See: www.ec.europa.eu/programmes/horizon2020

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[Source: DIT/gov.uk (Apr 2016)]

Food and drink

Spain's food and drink sector has grown since the beginning of the economic crisis. Demand for British products has increased due to:

- Spanish acceptance of products
- large numbers of British expats
- large numbers of British tourists

Demand is very strong for gourmet and premium products.

Alimentaria, Europe's third biggest food and drink exhibition, offers opportunities for UK suppliers. See: www.alimentaria-bcn.com/en/Home

British cereal grain tends to do very well in the Spanish market as British and Spanish harvest times differ.

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Contact Trade Adviser aurora.ortega@fco.gov.uk for more information on opportunities in the food and drink sector in Catalonia.

[Source: DIT/gov.uk (Apr 2016)]

Healthcare

Spain continues to invest heavily in healthcare. There are about 750 public hospitals, 300 private hospitals and seven million private health policy owners in Spain. Healthcare is devolved to the regions so care and access to drugs can vary from region to region.

The aging population and rise in chronic diseases is increasing pressure on the healthcare system. As a result there are opportunities for products and services involving:

- cutting stays in hospital
- wound management
- telemonitoring
- e-health

Catalonia is a major centre in southern Europe for R&D activities. It is home to:

- BioRegió de Catalunya (BioCat), a centre for pharmaceutical companies. See: www.biocat.cat/en
- Southern European Cluster in Photonics and Optics (SECPHO). See: www.secpho.org/en
- ALBA, the Spanish synchrotron radiation facility. See: www.cells.es/en

There are opportunities for UK Contract Research Organisations (CROs) in Catalonia:

- selling services to drug development companies
- selling services to discovery research centres

- selling innovative or cost efficient products and equipment for R&D

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Contact Senior Trade Adviser jessica.griffiths@fco.gov.uk for more information on opportunities in the life sciences sector in Catalonia.

[Source: DIT/gov.uk (Apr 2016)]

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