

CBI MARKET SURVEY

**THE NATURAL COLOURS, FLAVOURS AND THICKENERS
MARKET IN SPAIN****Publication date: April 2007****Report summary**

This CBI market survey discusses, amongst others, the following highlights for the natural colours, flavours and thickeners market in Spain:

- Spain has an estimated medium-sized industrial demand for natural colours, flavours and thickeners.
- Spain is a leading producer and processor of citrus oils and selected thickeners in the EU.
- In 2005, Spain was the sixth largest importer of natural colours, flavours and thickeners. Spain is a net exporter of this product group.
- Developing countries play an important role in Spanish imports. They supply 47% of total Spanish imports.

This survey provides exporters of natural colours, flavours and thickeners with sector-specific market information related to gaining access to Spain. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The natural colours, flavours and thickeners market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.eu/marketinfo>

1. Market description: industrial demand and production**Industrial demand*****Total market size***

Spain can be considered to have a medium-sized industrial demand for natural colours, flavours and thickeners compared to other EU countries. The reason for this is the presence of several production facilities of multinational food ingredient companies, particularly flavour manufacturers. Spain also has a large market for end-products with natural colours, flavours and thickeners. Between 2004 and summer 2005, Spain had the third highest number of new product releases labelled as "all natural" or without preservatives or additives, after the UK and Germany (Mintel, 2005). It is expected that industrial and consumer demand will at least remain stable in the near future.

Product groups

According to industry sources, Spain does not have a large industrial demand for natural colours compared to other EU countries. As regards consumption of end-products, Spain still consumes a large number of products with synthetic colours, compared to West European countries. However, this is changing fast.

With respect to flavours, however, industry sources indicate that Spain has a relatively large industrial demand. The reason for that is the presence of processing facilities of several multinational flavour manufacturers, like Givaudan SA and Lucta SA. Most leading multinational flavour producing companies, however, have their production facilities in other EU countries.

Industry sources indicate that Spain has a relatively large demand for agar-agar in the EU. The presence of an agar-agar industry and national preferences have a strong influence on this.

The same applies to the products locust bean gum and carrageenan. Locust bean gum is known to be processed by Cargill.

Production

The production described here is limited to the production of raw materials, as the processing into end-products has already been described above.

Total production

Spain can be considered to be a relatively large producer of natural colours, flavours and thickeners compared to other EU countries. Essential oils and thickeners are, in particular, produced in relatively large amounts. Industry sources indicate that production of natural colours, flavours and thickeners is expected to increase, in response to increased demand for natural food ingredients.

Product groups

Industry sources indicate that Spain is a leading producer of the raw materials for natural colours in the EU. The raw material consists mainly of paprika, of which Spain is the largest producer in the EU. However, other important products like carmine, anthocyanins and B-Carotene are produced by suppliers in other countries.

Although production data are not available, production of vanilla and menthol is expected to be negligible due to the lack of favourable production conditions.

The mild climate blessing the Mediterranean region, the soil conditions, the great variety of aromatic plants growing in the wild and the development of plantations makes Spain an ideal place to cultivate the different citrus species and varieties. Oranges, grapefruits, mandarins and lemons have for many years formed an important part of this area's gastronomic traditions. Bergamot oil is also produced in significant amounts. As a consequence, and parallel to the consumption of these fruits in fresh form, the citrus processing industry in countries such as Italy, Spain, Israel and Turkey, has developed its own importance. Despite the strong competition from other growing areas, the Mediterranean region last year produced more than one third of the total lemon essential oil on the world market. This factor, together with the special characteristics of the citrus oil produced in this area, makes it an origin to take into account when making decisions regarding citrus oils supplies. Other essential oils produced in Spain include clary sage, thyme, lavender, lavandin, marjoram, organum, rosemary and tansy. It is expected that production of essential oils will continue to grow in the near future, although it must be noted that production is heavily dependent on weather conditions and is therefore difficult to predict.

According to industry sources, Spain is the largest producer of locust bean gum in the EU. This is for a great part due to the fact that the ingredient for producing locust bean gum can only be found in the Mediterranean region. It is expected that, in the near future, production of locust bean gum will increase in order to meet the needs of the market.

The same industry sources state that Spain is a relatively large producer of carrageenan compared to other EU countries. Furthermore, it is expected that production of carrageenan will increase in the coming future, as a result of increased applications for carrageenan in the food industry.

Spain is the largest producer of agar-agar in the EU. For a great part, this is due to the fact that the raw material for agar-agar is present along the Spanish coast line. Industry experts indicate that production has been constant over recent years and it is expected that it will remain constant in the coming future, due to a stable supply of raw material.

Spain does not produce significant amounts of Xanthan gum, guar gum and gum Arabic.

Major players

- Herbes del Moli (<http://www.herbesdelmoli.com/>): producer of essential oils.
- Carob SA (<http://www.carob.es/>): Leading producer of locust bean gum and tara gum and supplier of guar gum and xanthan gum.
- Ceamsa SA (<http://www.ceamsa.com/>): producer of carrageenan and locust bean gum.
- Roko SA (<http://www.rokoagar.com/>): Leading producer of agar-agar in the EU.

Refer to Section 3 for companies with processing facilities in Spain.

Trends in industrial demand and production

- Increased demand for low-energy, low-fat food. Hence, more demand for healthy (organic) ingredients.
- Increased demand for convenience food with longer shelf-life.
- Production and industrial demand for natural colours and flavours will harmonize more with the rest of the EU. This means increased industrial demand for, and production of, natural colours (instead of synthetic) and natural extracts.

Opportunities and threats

- Demand for semi-refined, relatively cheap carrageenan is increasing; the demand could be met by developing country producers.
- Demand for natural food ingredients is increasing, offering opportunities for developing country suppliers.
- Tara gum is increasingly used as a substitute for locust bean gum.

Useful sources

- FIAB (<http://www.fiab.es/>): Spanish Federation of Food and Drink Industries
- AEFAA (<http://www.aefaa.com/>): Spanish Food Flavours and Fragrances Association

2. Trade: imports and exports

Imports

Total imports

In 2005, Spain was the sixth largest importer of natural colours, flavours and thickeners, with an import value amounting to € 120.9 million. Therefore Spain can be considered as a medium-sized importer. Spanish imports accounted for 7% of total EU imports and, over the period 2001 – 2005, Spanish imports increased by 4% annually. Developing countries play an important role in Spanish imports as they represent 47% of total Spanish imports. The leading developing country supplier was China with a share of 19% in total imports. Moreover, the value of imports sourced in China increased by 19% annually in the period 2001 – 2005.

In 2005, China (19%), France (16%), India and Germany (both 9%) together accounted for more than half of total Spanish import value. Therefore the Spanish import market can be considered as relatively concentrated.

Imports by product group

Table 2.1 Leading suppliers of natural colours, flavours and thickeners to Spain (share in imported value, 2005)

Product	2001 € million	2003 € million	2005 € million		Leading suppliers in 2005 (share in %)	Share in Spanish imports (%)
Total	102.5	114.4	120.9	Intra-EU:	France (16), Germany (9), Denmark (8), The Netherlands (4), Italy (4)	48
				Extra-EU excl DC*:	USA (3), Japan (1), United Arab Emirates (1), Singapore (1)	6
				DC*:	China (19), India (9), Indonesia	47

Product	2001 € million	2003 € million	2005 € million		Leading suppliers in 2005 (share in %)	Share in Spanish imports (%)
					(3), Peru (3), Brazil (2)	
Natural Colours	28.1	22.6	23.6	Intra-EU:	Germany (8), France (4), Denmark (2), Italy (2), United Kingdom (1)	17
				Extra-EU excl DC*:	USA (1), Japan (1)	2
				DC*:	China (51), India (15), Peru (10), Zimbabwe (3), Mexico (2)	81
Flavours	4.7	4.5	5.0	Intra-EU:	France (23), Germany (9), The Netherlands (7), United Kingdom (3), Italy (2)	46
				Extra-EU excl DC*:	-	0
				DC*:	China (47), India (7)	54
Manioc starch	0.01	0.06	0.02	Intra-EU:	France (21), Germany (10), The Netherlands (8)	38
				Extra-EU excl DC*:	-	0
				DC*:	Colombia (23), China (21), Brazil (19)	62
Natural gums, resins and balsams	5.9	9.4	5.9	Intra-EU:	France (44), Germany (15), Denmark (11), Italy (6), United Kingdom (4)	86
				Extra-EU excl DC*:	-	0
				DC*:	India (6), Brazil (6), China (1), Cuba (1)	14
Pectates, agar-agar, mucilages and thickeners	23.2	26.1	39.6	Intra-EU:	Denmark (23), France (22), Germany (12), Portugal (6), Italy (6)	72
				Extra-EU excl DC*:	USA (1), South Korea (1), Japan (1)	2
				DC*:	Philippines (5), Chile (5), China (4), Malaysia (4), India (3)	26
Essential oils	40.6	51.7	46.6	Intra-EU:	France (13), The Netherlands (9), Germany (7), United Kingdom (5), Italy (3)	38
				Extra-EU excl DC*:	USA (6), United Arab Emirates (2), Singapore (2), Japan (1), Australia (1)	12
				DC*:	China (16), India (10), Indonesia (9), Brazil (5), Haiti (2)	50

Source: Eurostat (2006)

*DCs: Developing countries

In 2005, essential oils was the leading product group imported by Spain, accounting for 39% of total imports, followed by pectates, agar-agar, mucilages and thickeners (33%). The leading developing country supplier of essential oils was China with a share of 16%. However, between 2001 and 2005 the import value declined by 6% annually. For pectates, agar-agar, mucilages and thickeners, it was the Philippines which was the most important developing country supplier with a share of only 5%. However, between 2001 and 2005 the import value increased by 104% annually. Spanish imports of both essential oils and pectates, agar-agar, mucilages and thickeners demonstrated annual average growth rates, accounting for 4% and 14% respectively, in the period 2001 – 2005.

Note that for the product group essential oils, 'other essential oils' accounted for 56% of total imports. In the case of pectates, agar-agar, mucilages and thickeners 'other mucilages and

thickeners' (mainly carrageenan) accounted for 39% of total imports, followed by pectins (34%).

Exports

Spain is the second largest EU exporter of natural colours, flavours and thickeners. In 2005, exports amounted to 22.5 thousand tonnes with a value of € 199 million, representing 15% of total EU export value. In the period between 2001 and 2005, export value increased by 22%, which is remarkable compared to the EU average decrease of 4%. In 2005, Spanish exports of natural colours, flavours and thickeners consisted of pectates, agar-agar, mucilages and thickeners (55%), natural colours (22%), essential oils (20%), flavours (2%), natural gums, resins and balsams (1%) and manioc starch (0%).

Opportunities and threats

- Spain is a net exporter of natural colours, flavours and thickeners. Import value increased over the period 2001 – 2005, but export value increased at an even higher rate over the same period. Spain should be considered as a major competitor for selected products.
- Developing countries are an important supplier to Spain, accounting for almost half of total import value. This indicates that developing country exporters are in a strong position to export to Spain.
- Developing countries are especially important in the supply of natural colours and essential oils. Although the import value of essential oils from developing countries is increasing, the import value of natural colours from developing countries is decreasing.

Useful sources

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>
Go to: trade statistics.
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>
Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.

3. Trade structure

Trade channels

Spain is covered by the EU distribution network for natural colours, flavours and thickeners which consists of a relatively small number of multinational processors, traders and agents. Therefore, the trade structure in Spain cannot be described separately from the trade structure given in the survey covering the EU market.

The market for colours and flavours is dominated by compounders which supply the largest food manufacturers. These multinational processors are often vertically integrated including import, production/processing, marketing and sales. Moreover, they are often integrated horizontally as well to include many different, but related products (i.e. colours and flavours). Although production facilities are located in just one or a few locations, sales offices of these multinationals are spread out more widely. They are located in many different countries in order to cover specific countries or regions. IFF, for example, has sales offices in 11 EU countries. Although smaller markets are often covered by sales offices located in other countries, larger markets such as Spain are generally covered by one office dedicated solely to that market. The reasons for the multinationals to have offices in many different countries are market coverage and knowledge of customer requirements. By having offices in different countries, they can reach more buyers and gather more specific information about country, regional and company specific requirements. This enables them to compete better with other suppliers.

Smaller food manufacturers in Spain are in many cases supplied by independent traders and agents. Similar to the compounders, some traders have set up local offices in different countries, from where they sell their products. Sometimes, local sales offices have their own purchasing department. They basically operate independently, but under the same flag.

The EU-wide scope of the multinational processors, traders and agents requires that developing country exporters assess carefully the channels through which country and company products reach end-users. The location of end-users is often different from where the products are imported. Products sold by the sales office of IFF in Spain, for example, might come from a production facility in France, The Netherlands, Sweden or the UK. This means that products from a developing country exporter aiming to supply large food manufacturers in Spain might have to go to France, The Netherlands, Sweden or the UK first.

Major compounders, traders and agents active in the Spanish market for colours, flavours and thickeners are listed below. Many of the major players are multinational companies which are mentioned in the survey covering the EU market. For some companies, an indication is given of the location of the headquarters, production facilities or sales offices. Note that only those offices and facilities are mentioned which are active in the markets for colours, flavours or thickeners:

- Cosmos Aromática Internacional (<http://www.cosmosaromatica.com>): manufacturer of flavours based in Spain.
- Lucta S.A. (<http://www.lucta.com>): manufacturer of flavours.
- Cargill España S.A. (<http://www.cargill.com>): supplier of flavours and thickeners.
- Evesa (<http://www.evesa.com/>): manufacturer of colours and flavours, based in Spain.
- Givaudan Ibérica S.A (<http://www.givaudan.com>): manufacturer of flavours. Has a creative office in Spain and 3 sales offices.
- Deprovesa WILD S.A (<http://www.wildflavors.com/>): manufacturer of flavours, headquartered in the US with a manufacturing facility in Spain.
- Carob SA (<http://www.carob.es/>): Leading producer of locust bean gum and tara gum and supplier of guar gum and xanthan gum.

Other companies active in the Spanish market for natural colours, flavours and thickeners are: Sensient Food Colors Europe (through distributors Biomiin 95 and IMPEX Quimica), Symrise, Firmenich, Danisco, Döhler, International Flavours & Fragrances.

Trends

- The consolidation in the EU market for colours, flavours and thickeners is also applicable to the Spanish market.
- Increasing production scales. Particularly the large companies invest in upgrading the capacity of their production facilities.

Useful sources

For more suppliers of colours, flavours and thickeners: <http://www.thomasglobal.com>.

4. Prices and margins

Prices and margins

Please refer to the CBI market survey covering the EU market for prices of natural colours, flavours and thickeners. The price indications given there are the best reference point for prices in Spain. If any price differences exist, they are the result of differences in transport costs and individual buyer preferences for product origin, quality, packaging, etc. These differences are considerable, both between countries and within countries. Nonetheless, global market prices as mentioned in the survey covering the EU market are the basis for price calculations in every country. Actual prices are dependent on negotiation with partner companies.

The margins charged by different intermediaries in the trade of natural colours, flavours and thickeners are influenced by many different factors. These include the product type, the current and expected future harvest situation, the availability or number of sources for the particular product, the level of demand and the trend in prices.

Useful sources

- The Public Ledger (<http://www.public-ledger.com>): Prices for selected colours, flavours and thickeners
- MCX India (<http://www.mcxindia.com/>): Prices for menthol and guar
- Chemical Marketing Reporter
- Quarterly Review of Food Hydrocolloids: Prices for hydrocolloids
- Organic Trade Services (<http://www.organicsts.com/>): Prices for organic products

5. Market access requirements

As a manufacturer in a developing country preparing to access Spain, you should be aware of the market access requirements of your trading partners and the Spanish government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

Legislative requirements

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

Non-legislative requirements

Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

Packaging, marking and labelling

For general information on packaging, refer to the survey covering the EU. You can download information on requirements on packaging, marking and labelling in specific EU markets from <http://www.cbi.eu/marketinfo>.

Tariffs and quota

Tariffs and quota are set by the European Commission and are the same for all EU countries. Refer to the survey covering the EU market for more information.

Useful sources

- CBI Database <http://www.cbi.eu/marketinfo>
- Taric Homepage http://europa.eu.int/comm/taxation_customs/dds/en/tarhome.htm
- Directorate General XXI http://europa.eu.int/comm/taxation_customs/common/publications/info_docs/taxation/index_en.htm

6. Business practices

Selecting a suitable trading partner

New suppliers of natural colours, flavours and thickeners are likely to meet with resistance from buyers, as this is a very conservative market depending to a great extent on trust regarding supply and quality. Producers and buyers also closely guard information and "secrets". Once stable trading relationships have been established, however, reliable markets can be gained.

Due to the restraints of buyers of natural colours, flavours and essential oils regarding new suppliers, a common procedure in this market is for buyers to send an agent to the producing country, to visit potential suppliers. However, it is also common for exporters to contact buyers. In many cases, first contact is preferably made by e-mail. This e-mail should include a quotation with a material safety data sheet and a technical data sheet, quantities, prices, delivery times, etc.

As in many other industries, price/quality ratio is the main criterion which importers use to select their supplier. Other important criteria are related to reliability. Food manufacturers like Cargill need constant supplies of basic raw materials. They check the financial stability of potential suppliers and what kind of measures the companies take to deal with disappointing harvests and shortages. Large companies like Cargill also spread risks by sourcing from multiple suppliers.

A major trader in natural ingredients for food products, Danisco, performs a commercial, technical and qualitative audit of a potential supplier of raw materials, before selecting a new supplier. They will look into documents such as the annual report, the banker's credit report and product range information.

Note that processing of the raw material is not always preferred by importers. Some of them have their own processing facilities which add value to the product and increase their margins.

Reaching an agreement with your trade partner

Buyers will often request a sample for approval before actual shipment takes place. The sample should be accompanied by some of the following documents, depending on the requirements of the buyer:

- Material safety data sheet
- Technical data sheet
- Pesticide residue analysis
- GMO-free declaration
- Declaration of non-animal product derivatives
- Kosher and Halal certificates
- Organic certificate
- Fairtrade certificate

(ITC's marketing manual for organic spices, herbs and essential oils, 2004).

The buyer will carefully analyse the sample and test its physico-chemical quality. Samples should be representative of the complete shipment to prevent procedural problems. Reliability of delivery in terms of product specifications is mentioned by importers as a critical condition for a good trade relationship.

Natural ingredients are agricultural products which depend on weather conditions for their production. The quality of these products is difficult to control. Large buyers, such as Nielsen Massey (vanilla), often send inspectors to audit their suppliers with the objective of controlling quality as much as possible.

Buyer and supplier should agree on terms of payment in advance. The most commonly used terms of payment are the *Letter of Credit (L/C)* and *Cash Against Documents (CAD)*. When using an L/C, risks are divided between buyer and supplier. The supplier only receives payment after the goods are consigned to a carrier and the buyer only receives the goods after payment. CAD carries the greatest risk for the exporter, as the exporter will only receive payment when the buyer picks up the goods. Other payment terms which carry even more risk for the exporter are bank transfers after 30 days and consignment. In case of co-operation agreements with overseas companies, payment terms could also include periodical payments. Once trading relationships are established, clean payments are often used. The selected payment method often depends on the degree of trust between buyer and supplier.

Export terms of sale determine which costs are covered in the price of the cargo, at which point ownership transfers to the buyer and at which point responsibility for the cargo is transferred. The most commonly used terms of sale are FOB (Free on Board), CFR (Cost and Freight) and CIF (Cost, Insurance, Freight). It is recommended that quotations to European buyers of natural colours, flavours and thickeners should be made on a CIF basis. However, supplier and importer are free to negotiate and agree whether quotations and subsequent trade are based on CIF or FOB prices. Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

Cultural differences

A profound knowledge of the Spanish business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often decides a durable co-operation. Some key aspects are listed below.

- Spanish culture places a strong emphasis on personal pride. Therefore, causing loss of face through criticism or embarrassment should be avoided at all costs.
- Avoidance of uncertainty is a vital element of Spanish culture linked to the cautious approach the Spanish take towards new ideas. Spanish business managers generally prefer to have precise answers to questions and give precise instructions, in order to reduce conflict and any uncertainty.
- Hierarchy and position are extremely significant in Spanish business culture. The authority to make decisions rests with the individual in highest authority.
- Spanish business culture advocates subordinate initiative so that problems are dealt with at lower levels first, before approaching superiors for assistance.
- An essential part of conducting business in Spain lies in establishing personal contacts. Generally speaking, the Spanish prefer to do business with those with whom they are familiar, so that obtaining personal contacts enables the negotiation process to advance more swiftly and successfully.
- The decision-making process in Spain is usually unhurried and can be a gradual one.
- The Spanish appreciate a more modest approach to business negotiations.
- Remain patient in all dealings with your Spanish counterparts. However, the 'mañana', i.e. "tomorrow" stereotype is not something often encountered in northern regions.
- Use basic titles of courtesy, Mr, Mrs, or Miss, followed by the surname, and professional titles, such as Dr, where known, particularly with older counterparts or those in the south of Spain. Also pay attention to surnames.
- Punctuality is expected of foreign visitors; however, you may sometimes find your Spanish counterparts arrive up to 30 minutes late.

Internet provides many sources on business practices and culture, such as <http://www.communicaid.com/spanish-business-culture.asp> and <http://www.kwintessential.co.uk/resources/global-etiquette/spain-country-profile.html>. Please keep in mind that these pages only give general remarks. Therefore, when conducting business use your intuition and an understanding attitude.

Sales promotion

Common practices of trade promotion in Spain should not differ considerably from other European countries. An increasing number of Spanish people speak English, especially when they are in the trade business. However, many do not, and a general knowledge of Spanish is greatly appreciated. Good care should be taken of existing contacts, by using prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

Please refer to CBI's *Export planner* and *Your image builder* for more information on this subject.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focusing on natural colours, flavours and thickeners or the (organic) food sector. Interesting *trade associations* in Spain are:

- Spanish federation of Food and Beverage Industries / Federación Española de Industrias de la Alimentación y Bebidas: <http://www.fiab.es>

Trade fairs offer companies in developing countries the opportunity to establish contacts, promote their products and conduct EU market orientation. Major fairs of EU-wide significance are mentioned in the CBI document 'From survey to success: guidelines for exporting natural colours, flavours and thickeners to the EU'. *Trade fairs* of interest for entrance to the Spanish market in particular are:

- Alimentaria Barcelona is an international trade fair for the food industry: <http://www.alimentaria-bcn.com>
- Alimentaria Castilla y León: <http://www.feriavalladolid.com/alimentaria/en/index.php>
- Biocultura, an organic trade fair annually held in November in Madrid and Barcelona http://www.biocultura.org/visitantes/Horarios_Entradas_BIOCULTURA.html
- Ecoviure, an organic trade fair annually held in November in Manresa <http://www.ecoviure.cat/>

Trade press can function as a means for gaining insight into market developments and competition, but can also have a promotional function. This concerns finding potentially interesting companies, as well as promotion of your own activities and products. Major trade press of EU-wide significance is mentioned in the CBI document 'From survey to success: guidelines for exporting natural colours, flavours and thickeners to the EU'. *Trade press* of interest in Spain is:

- On-line information tool on the Spanish Food Industry: <http://www.marketuno.com/>

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