

# **SUCCESSFULLY ENTERING THE SPANISH RETAIL MARKET**

## ***AN UNDERSTANDING OF PRICE MARGINS AND SUPPLY CHAIN MECHANICS***



*September 2010*

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## 1 Preface

- Supply chain mechanics in Spain's grocery retail market is gradually becoming similar to other EU countries. Following the EU grocery retail trend, the Spanish market is becoming more and more consolidated with high levels of concentration as certain retailers begin to dominate the grocery scene. The presence of foreign retailers, especially in the hypermarket and discount sectors, with French and German groups heavily present, is also contributing to a standardisation in terms of retail demands and requirements.
- Despite this concentration, Spain still possesses a number of unique characteristics that makes it different from its European neighbours. Aspects such as logistics, packaging tax, product accreditations, retail pricing policies and promotional requirements all differ - to some extent - when compared to other EU markets
- The aim of this report is to therefore provide Irish exporters with an in-depth insight into what these requirements actually are. The report goes further by outlining in detail the requirements and demands of Spain's top five retail chains.

Green Seed Spain

## 2 Methodology

The following sources were used in order to produce this report:

### ***Desk research***

- GSG Spain trade and market knowledge:
  - For the past 20 years, GSG Spain has assisted foreign companies develop international sales in the Spanish food and drink market. GSG Spain has used this experience and knowledge in providing information on the various distribution systems available to food and drink exporters.
- Trade Press:
  - Alimarket
  - Aral
- Trade Organisations:
  - F.A.C.E – Gluten free association
- Internet:
  - Government web sites – MAPA
  - European commission web site
  - Distributor websites
  - Retail and foodservice websites
- Primary and Secondary Sources:
  - Planet Retail

### ***Trade interviews***

- Face to face and telephone interviews were held with retail buyers, local distributors and manufacturers in order to understand their views on Spain's supply chain mechanics and margins.

## 3 Value Chain Mechanics

### 3.1 Consumer research

- Before a company starts exporting to Spain, they need to have a sound knowledge of the retail market and its trends. They also need to consider whether their products are right for Spain and whether consumers would be willing to purchase their product offering.
- Consumer research is therefore very important as it will determine whether a product is suited to the market as well as determining the level of adaptation required for the product proposition to succeed. Investing in qualitative and quantitative research is therefore required (but not mandatory), especially when dealing with a branded proposition – private label propositions are normally assigned to suppliers when a tender is carried out which is a reactive approach as opposed to proactive.
- Exporters need to understand that investing in qualitative and quantitative research can be expensive, which may not provide a return in investment should the findings turn out to be negative. Qualitative research, such as focus groups, can cost in the region of 3,500 Euro for groups of 8 -10 people (2 to 3 hours worth). Private label taste panels however, are carried out by retailers.
- In addition to consumer research, exporters can invest in local scanner data in order to gain an in-depth understanding of the category they are involved in. Information on category sales, competition, price levels, formats, etc, will enable the exporter to be better positioned when approaching the Spanish market. Prices start from 2,500 Euro upwards, depending on how many variables are being analysed. Scanner data in Spain can be obtained via Nielsen or IRI.

## **3.2 Taxes and duties**

### **3.2.1 VAT**

- In Spain, there are three different VAT tariffs (IVA), two of which were recently increased in July 2010 as part of a range of deficit-cutting measures, aiming to consolidate recent ballooning government borrowing:
  - 4% “super” reduced rate applies to basic food products such as certain bread, milk, cheese, eggs, fruit and vegetables.
  - 8% reduced rate applies to all other food items.
  - 18% is the standard rate and is charged on all non-food items, alcohol, tobacco and services.
- Food exports from Ireland to Spain are considered intra-community supplies – the supply of goods by a VAT-registered trader in one EU Member State to a VAT registered trader in another EU Member State. As a result, a zero VAT rate is applied on the goods sold and should thus not be included in the invoice. The buyer, whether it is an importer/distributor or retailer, will apply the corresponding rate to the products when sold in Spain.
- For example, a retailer will charge VAT to the consumer, whilst an importer/distributor will charge VAT to the retailer, who will then add another VAT layer to the end user (consumer).
- If an exporter decides to set-up a local office in Spain, they would be required to register in Spain’s tax system and administer their VAT.
- It is important to note that VAT is always excluded when negotiating prices with retailers or importers/distributors.

### 3.2.2 Packaging Tax

- In order to reduce the environmental impact of packaging waste generated in the European Union, the European Parliament adopted Directive 94/62/EC (amended by Directive 2004/12/EC) on packaging and packaging waste, aimed at harmonizing the Member States' regulations.
- Law 11/1997, of April 24, on Packaging and Packaging Waste ("*LERE*" from its initials in Spanish) and the Regulations implementing it (approved by Royal Decree 782/1998, of April 30) incorporate the directive regulations into the Spanish legal system.
- Please note that exporters supplying the Spanish market directly to a retailer or via an importer/distributor are not liable. This only applies to those with a physical market presence.
- All packaging waste placed in the market and generated in Spain is within LERE directive. The LERE applies to the following:
  - Packaging manufacturers: engaged in manufacturing packaging, as well as those who import or purchase empty packaging in other Member States.
  - Packagers: engaged in both packaging products and importing packaged products in other Member States to be placed in the market.
  - Retailers and distributors: engaged in wholesale or retail distribution of packaging or packaged products.
- The LERE provides for two means by which to comply with its goals. Thus, all packagers and sellers of packaged products or, when these cannot be identified, those in charge of their first placement in the market must join either a Return, Collection, and Recovery System ("*SDDR*" from its initials in Spanish) or an Integrated Management System ("*SIG*" from its initials in Spanish).
- The Return, Collection, and Recovery System establishes a system of physical recovery of the packaging. This system requires packagers and sellers to guarantee, to the competent body in the relevant Autonomous Community, that each sales point (wholesale or retail) for its products has the logistical capacity to:
  - Accept used packaging and packaging waste from the products they have placed in the market returned by end consumers and customers.



- Return to end consumers and customers the amount charged on the purchase of the packaged product when they return used packaging and packaging waste.
- Handle used packaging and waste which allows them to separate by type for re-use.
- Integrated Management System (SIG) is the most commonly used in Spain. It allows packagers and sellers to be exempt from the above if they join an integrated waste system.
- This involves the packaging company to pay an amount by weight to the waste management company for all the packaging placed in the national market. Furthermore, once a company joins a SIG, the system assumes the responsibility for recovery and recycling of packaging waste.
- Currently, there are four SIG systems authorized in Spain, with Ecoembes being the most renowned for consumer products.
- Companies associated with ECOEMBES must place the “Green dot” symbol on their packs, shown on the right. The logo must not be less than 6 millimetres in diameter (the recommended size is 10 millimetres in diameter).



### **3.2.3 Excise duties**

- Consumer goods including wine, spirits, cigars, cigarettes and tobacco are subject to excise duty. Excise duty is charged on excise goods imported or produced in Spain, whether they are acquired from the European Union or from outside.
- Excise duty on most excise goods is based on the quantity of a product, rather than its actual value. Exceptions to this rule include alcohol duty, which is based on the alcohol strength of the product.
- In Spain, the following rates apply for alcoholic beverages:
  - Beers above 0.5 alcohol percentage is 2.75 Euro per hectoliter.
  - Wines currently pay no excise duties.
  - Products with an alcohol percentage between 1.2 and 22% range from 33.32 Euro and 55.53 per hectoliter.
  - All alcoholic drinks in Spain and the Balearic Islands with over 22% are 830.25 per hectoliter, whilst in the Canary Islands it is 649.66 Euro.
- For detailed information on Spanish VAT & customs regulations please visit the following website [www.aeat.es](http://www.aeat.es).

### **3.3 Labels and packaging**

#### **3.3.1 Labels**

- Government regulations on Spanish labelling/packaging regulations for food and drink are set out in the Real Decreto 1334/1999 decree, which sets standards for labelling, presentation and advertising of food products.
- Labels on foodstuffs must include the following information in Spanish:
  - Country of origin.
  - Full list of Ingredients, including additives, preservatives and colorants (if applicable)
  - Net weight/volume in metric units
  - Storage and usage instructions
  - Use by date
  - Alcohol percentage (if applicable)
  - Allergies (if applicable)
  - Manufacturer name and brand.
- Additional information in foreign languages is permitted provided it does not conflict with the information given in Spanish.
- The label contents can be checked at any stage of the distribution chain (customs, distributor warehouses, wholesalers or retail stores) so it is important to get it right. If the exporter is working with a distributor, it is strongly advised to let them make the necessary translations. A simple sticker containing the above information is sufficient, although if volumes permit, a branded Spanish pack would be ideal.

- In terms of functional health and nutrition claims, Spain follows the regulation put forward by the EU. The regulation lays down harmonised rules for the use of health or nutritional claims (such as “low fat”, “high fibre”, “helps lower cholesterol”, “vitamin/mineral enriched”, etc) on foodstuffs based on nutrient profiles.
- Quoted from the European commission website, “*The Health Claims Regulation will ensure that any claim made on a food label in the EU is clear, accurate and substantiated. In doing so, it will enable consumers to make informed and meaningful choices when it comes to food and drinks*”
- For further information please consult the following links:

[http://ec.europa.eu/food/food/labellingnutrition/vitamins/index\\_en.htm](http://ec.europa.eu/food/food/labellingnutrition/vitamins/index_en.htm)

[http://ec.europa.eu/food/food/labellingnutrition/claims/index\\_en.htm](http://ec.europa.eu/food/food/labellingnutrition/claims/index_en.htm)

### **3.3.2 Packaging**

- Packaging that is designed to come into contact with food is known as 'food contact material'. Food contact material is regulated by European regulation 1935/2004. This regulation lays down general safety requirements for food contact materials that protect human health, substance and food quality. The regulation covers all food contact materials and makes provision for specific controls on 17 particular groups, including:
  - 'Active' food contact materials - these release a substance into the food to extend its shelf-life, or to maintain/improve its condition.
  - 'Intelligent' food contact materials - these monitor and react to the condition of the food and or environment
- In Spain, these regulations are monitored by the Ministry of the Environment, Rural and Marine affairs. (MARM)
- For further information please consult the following link:  
[http://ec.europa.eu/food/food/chemicalsafety/foodcontact/framework\\_en.htm](http://ec.europa.eu/food/food/chemicalsafety/foodcontact/framework_en.htm)

### **3.4 Logistics**

- Transport and distribution are key considerations when planning for developing exports to Spain. Choosing the right mode of transport is essential to ensure the export process is efficient and cost-effective.
- There are a number of distribution models available to exporters when looking to do business in the Spanish food and drink industry. Each model depends largely on the exporter's product proposition and route to market strategy, which can take the form of selling directly to retailers, selling via local distribution partners or setting up a local distribution hub.
- If an exporter is dealing directly with a retailer in Spain, they need to ensure a quick and efficient logistic set-up is in place. Depending on the product rotation, a retailer in Spain will very rarely hold stock in their depots, requiring instead a high level of service from their suppliers. In this case, using a Logistic Service Provider (LSP) with regular deliveries to Spain is advised. Forwarders will quote shipments on a per pallet basis which will need to be built into the quoted price for the retailer. The pallets used in Spain are Euro pallets, measuring 1200 x 800 mm.
- Alternatively, retailers will request ex-work prices and collect the orders themselves (back-hauling) if it results in a lower price for them. Eroski for example does this regularly with their private label suppliers.
- Exporting via a local distribution partner can also involve the usage of an LSP, should the local partner require delivered prices to Spain. For a successful partnership, an exporter will need to make sure their respective responsibilities are clearly understood. The use of Incoterms, an internationally accepted system of trading terms for the delivery of goods, is recommended to avoid any ambiguity. The main disadvantage with this however is the additional margin added to the unit price.
- Setting up a local distribution hub will ensure a more controlled and direct logistic system however the costs involved are very high.

### **3.5 Electronic Data exchange requirements**

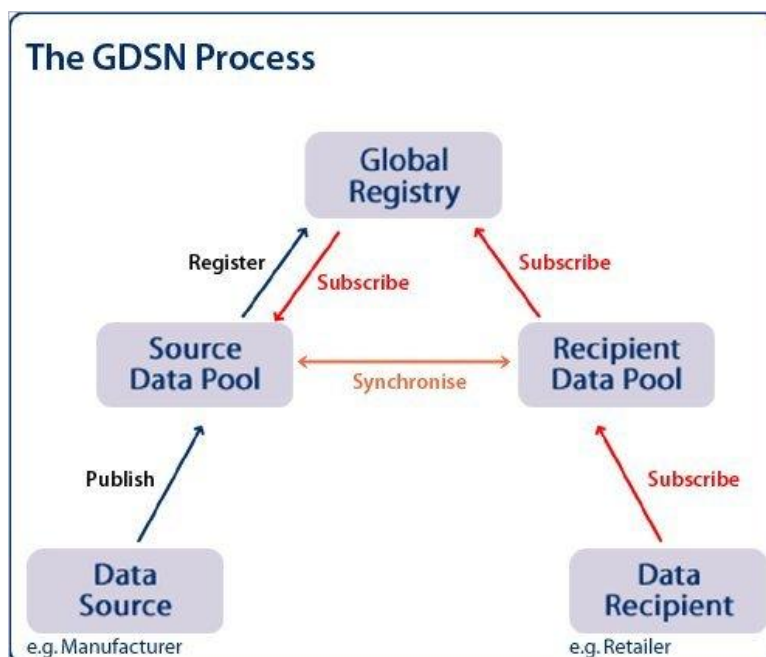
- Electronic Data exchange is a must when an exporter deals directly with a retailer based in Spain - the extent of which varies depending on the retailer. If a listing is agreed, the exporter must make sure they meet the retailer's requirements, adjusting if necessary to their system.
- When dealing with importers/distributors, electronic data exchange is very rarely required.
- The following systems are the most commonly used in Spain:

#### **3.5.1 EDI**

- EDI is an abbreviation for Electronic Data Interchange. The basic definition of EDI is computer-to-computer communication of business documents, in a standardized format, between two companies. It facilitates the exchange of documents (such as purchase orders, advance shipment notices, and invoices) without human intervention or human legible (paper or electronic) documents, thus improving the quality and speed of exchanged information.
- In Spain, EDI is mostly used by retailers when ordering, invoicing and making payments to their suppliers. As a result, exporters looking to supply directly to Spanish retailers need to have a valid EDI certificate in order to receive – and send – EDI messages.
- The Spanish association for commercial codification (AECOC – now GS1 Spain) is responsible for defining and regulating the use of EDI in Spain. For further information please consult the following link: <http://www.aecoc.es>

### 3.5.2 GDSN

- The Global Data Synchronization Network (GDSN) is a distributed system of global data pools that was launched by GS1 in 2004. These data pools communicate with the GS1 Global Registry, enabling suppliers to publish their product information to retailers in order to ensure that they have the most accurate and up-to-date product or location information.
- In May 2006, GS1 Spain launched a highly advanced GDSN-compliant data pool to include secure pricing and promotional information. Through this data pool, called AECOC Data, more than 21,000 companies, manufacturers and suppliers throughout Spain are able to synchronize product data and share pricing and promotional information with trading partners anywhere in the world. This represents an opportunity for foreign suppliers to synchronize data with Spanish retailers more efficiently, enabling retailers to be electronically notified of any special product promotions and temporary or permanent pricing changes
- To become a certified member, companies need to register and become a member of a GDSN certified data pool via GS1.



### **3.5.3 Trace One**

- Trace One is an e-collaborative platform used by manufacturers and retailers when developing private label projects. The platform, which is used by retailers such as Carrefour and Eroski, enables real-time information sharing between retailers and suppliers, cutting 50% from the time required for data entry tasks, negotiation and signature of product technical specifications. Private label development aspects such as packaging design, technical data sheets, taste panel results, are all carried out online in a secure and collaborative manner for faster time to market.
- Consisting of a structured database that hosts all technical information for product specifications, the Trace One tool ensures that specifications meet current regulations and those products and their processes both meet the strictest quality standards.
- The platform is available for access and modification 24 hours a day via Internet, drastically reducing the need for paper documents and ensuring detailed monitoring of all changes made in the technical specifications and global manufacturing process.
- Trace one is becoming a mandatory tool for those looking to develop private label ranges for Eroski and Carrefour. It is expected that this platform will gradually be adopted by other retailers based in Spain.

## **3.6 Accreditations and certifications**

- Just as in every other market, Spain has its own set of accreditations and certifications which exporters need to comply with. The following certifications need to be taken into account:

### **3.6.1 Gluten Free**

- There are currently two different logos used in Spain for gluten free products. The first one, following EU guidelines, is the standard gluten free logo for foods containing a maximum amount of gluten in 20 ppm (parts per million) for "naturally gluten-free" foods and 200 ppm for foods labelled "gluten-free" from ingredients that used to contain gluten (such as wheat starch).





- However, F.A.C.E (www.celiacos.org) the Spanish federation for coeliacs, has introduced its own guidelines and logo as they believe the current limit is too high. The critical limit set by F.A.C.E is 10 ppm, an amount which may be further reduced in the near future. Such products are tested by ENAC accredited laboratories.



- For further information on obtaining the F.A.C.E accreditation please consult the following link in English: [http://www.celiacos.org/controladoporface/en\\_reglamentogeneral.pdf](http://www.celiacos.org/controladoporface/en_reglamentogeneral.pdf)

### **3.6.1 Organic**

- In July 2010, a new obligatory EU organic logo was launched, intended for all organic pre-packaged foods within the European Union.



- For non pre-packaged organic foods the new logo is voluntary. This also applies to imported organic foods from third countries.
- For exports within the EU, national logos are permitted, although the new EU logo must be present too. Quoted from the EU organic farming web-site, *"If operators wish to sell their products in another EU Member State than their own, they may place an additional national or private logo that will be recognised by the consumers of this particular country. However, the EU organic logo should in time be recognised by all European consumers."*
- To obtain the organic certification and logo, companies need to contact their local certification body to perform the required audits.

### 3.6.2 Global Food Safety Initiative (GFSI)

- The majority of retailers in Spain will only consider business with suppliers who have gained certification to a global, recognized food safety standard such as the IFS, BRC HACCP and SQF.
- IFS is widely demanded in Spain by retailers, especially for own label developments. Carrefour Spain for example is very inflexible when it comes to certification and auditing, requesting suppliers to obtain an IFS certification, even if they already possess BRC.
- An example of an IFS certification can be seen below.



### **3.6.3 Global Gap Certification**

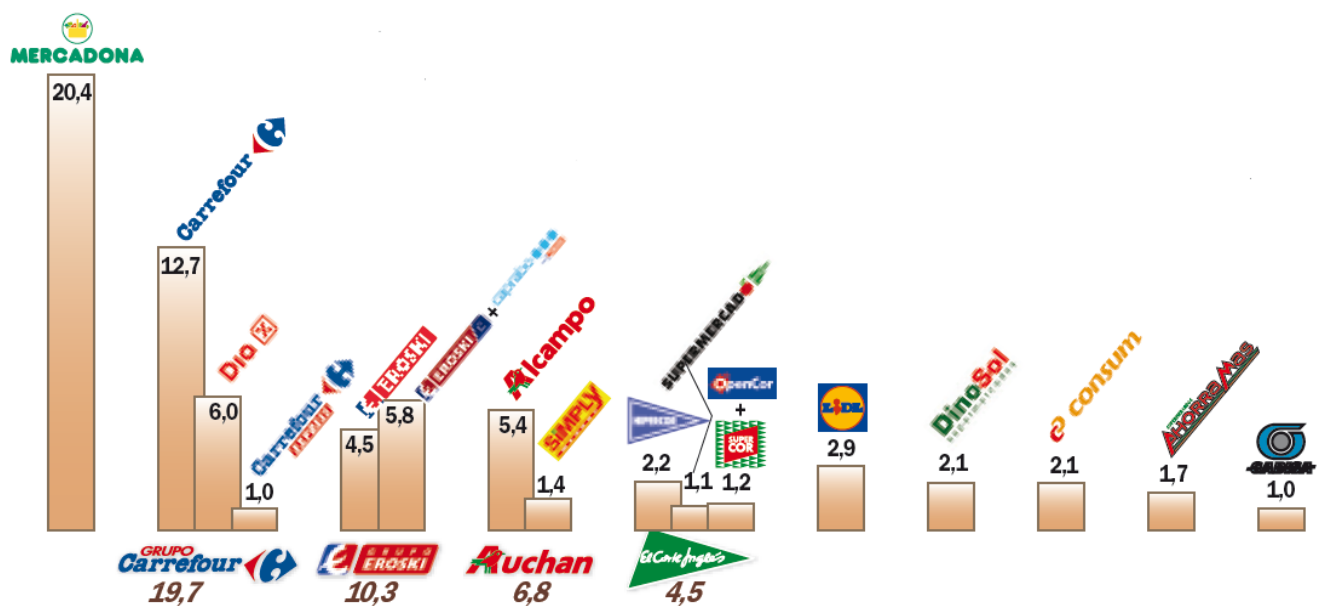
- Global Gap is an internationally recognized set of farm standards dedicated to Good Agricultural Practices (GAP). Through certification, producers demonstrate their adherence to Global Gap standards. For consumers and retailers, the Global Gap certificate is reassurance that food reaches accepted levels of safety and quality, and has been produced sustainably, respecting the health, safety and welfare of workers, the environment, and in consideration of animal welfare issues.
- In Spain, almost 20,000 Spanish manufacturers have the Global Gap certification – almost 20% of total certified companies' world wide – the majority of which are fruit and vegetable suppliers. The reason for this is the high demand of Spanish fruit and vegetables across the globe.
- As a result, Spanish retailers are accustomed to working with the certification and thus expect international suppliers to comply as well – although in some cases it is not obligatory.

## 4 Retailers

### 4.1 Retail channel overview and structure

- According to the Ministry of the Environment, Rural and Marine Affairs (MARM) there are a total of 17,000 modern grocery retail stores in Spain, 70% of which are supermarkets – 2008 data.
- The supermarket sector as a whole has experienced the biggest growth rates in the Spanish retail market, a factor which has been influenced greatly by the obstacles presented to large distribution companies when trying to obtain licenses to open hypermarkets. According to AC Nielsen, supermarkets ranging from 1,000 sq.m to 2,500 sq.m have grown by 45.7%. Last year for example 70% of store openings in Spain were supermarkets, whereas hypermarkets represented only 10% (*source: Alimarket*). As a result, distribution groups such as Carrefour have re-evaluated their supermarket strategy in order to compete against the likes of Mercadona & Eroski who lead this segment.
- Nielsen data illustrates this trend with supermarkets sales per m2 increasing to 4,010 Euro in 2009 from 3,571 Euro in 2000, compared to hypermarkets which have decreased to 4,298 Euro per m2 from 5,296 Euro per m2 in the same period.
- In terms of sales within the modern grocery retail channel, AC Nielsen estimated a total sales value of 66,700 Million Euro in 2008, representing a sales growth of 4.6% (includes drugstore products & perfume). This growth was down to the increases in food consumption driven by the growing Spanish population (due to the constant inflow of immigrants) and the higher purchasing power of households. However, 2009 data showed a growth of only 0.3%, reflecting the economic struggle that Spain is going through.
- This crisis, in which consumers are increasingly becoming price conscious, has increased the share of private label products because of their reduced prices against brands, representing over a third of total grocery sales.

- In 2009, NPD launches decreased by 50% as manufacturers tried to “defend” themselves from private label products and recover consumer loyalty towards their brands, investing heavily in aggressive advertising campaigns and promotions. According to IRI data, private label products experienced an 8.9% growth in 2009, whilst branded food sales dropped by 5.7%
- Looking at its structure, the grocery retail market in Spain is very similar to other EU countries, with a decreasing presence of traditional stores and a high level of concentration amongst top chains. The top five players represent almost two thirds of the market, the majority of them operating multi-format concepts, with the exception of Mercadona which only operates Supermarkets.
- The Market has a strong foreign presence, with French and German groups heavily present in the Hypermarket (Carrefour & Auchan) and Discount sectors (Dia - Carrefour Lidl, & Aldi) respectively. The Supermarket formats are controlled by domestic chains (Mercadona & Eroski).
- The following graph illustrates the respective market shares of Spain’s leading grocery chains (*source: Alimarket – October 2009*)



## 4.2 Spanish retailer buying power

- In Spain, the majority of food retailers are not part of any buying groups, relying on their own buying power to negotiate discounts from suppliers - apart from Eroski who is part of the Alidis group formed by Edeka and Intermarche.
- Spanish retailers take their purchasing decisions on the basis of a two step procedure. In the first stage, the retailer tends to base their interest using as criteria price, interest in the brand, guarantee of supply, and so on. Private label projects are normally assigned after having carried out a tender, in which manufacturers are contacted directly and invited to take part in a “*concurso*”, competing against other manufacturers in price, quality, product specifications, etc. For private label development, it is always recommended to contact the retailer to inform them of your interest should a tender opportunity arise in the future - becoming shortlisted for future tenders simply requires first contact by phone or e-mail.
- The second step is the elaboration of what is commonly called the “*plantillas*”, in which the retailer makes explicit the conditions of the supply relationship. The standard conditions of these supply contracts amongst a high number of Spanish retailers are the following:
  - A listing fee which is paid simply for store presence; these vary according to the retailer but are normally priced on a per store basis. For example, El Corte Ingles charges 2 cases per store / per reference to be paid in cash. An invoice is sent to the manufacture once the number of stores and references has been agreed.
  - Slotting allowances for shelf space.
  - Promotional support, normally based on a percentage of yearly sales, estimated by the buyer. This percentage ranges from 10 to 15% for branded products and 8 to 10% for private label.
  - Additional monetary sums to locate products in end-of-aisle displays.
  - Fixed end-of-year rebates: payments in addition to per unit compensation linked to volumes of sales achieved.
  - Return of unsold units (especially relevant for fresh food and vegetables)
  - Merchandising, which can either be carried out by the retailer for an agreed fee or by the manufactures / distributors themselves
  - “Loyalty” fee for own label products which are in the region of 1% contributions to promotions such as 3 for 2 deals or promotional leaflets.

- These last two variables are applied by retailers differently. Carrefour for instance builds these conditions into the net price provided by the manufacturer/ supplier. For example:
  - € 0,80 delivered to Madrid
  - + 8% for yearly promotions
  - + 0.06% for merchandising
  - Final price: **€0.86**
- Manufacturers dealing with Spanish retailers will also sometimes come up against additional fees which can be found in the “*plantillas*” small print such as contributions to store openings, remodelling and extensions. In these cases, retailers will suggest manufacturers to pay x amount as an *opening contribution* fee per store
- In terms of retailer *margins*, different retailers apply different margins for branded and private label products, depending on the product category and the retailers positioning in terms of price and service levels. On average, branded margins can vary between 25 to 35% whilst own label can be between 25 to 50% - commodity products such as cereals for example have lower margins in comparison to added value products which can sometimes be as high as 50%.



### 4.3 Mercadona

Group / Banner	Nº of stores 2009	Sales 2009 (M.€)	% 08/09
Mercadona	1,284	14,402*	+1%

\* Estimated sales

Source: Green Seed table obtained from Alimarket data

- In 2009, Mercadona took over Carrefour's number one position as Spain's leading grocery retail operator with an annual turnover of 14,402 Million Euro and over 1,200 establishments.
- The Valencian company operates a single Supermarket retail format with stores of approximately 1,300 to 1,500 square metres in size, located in town centres. Their success is down to effectively managing to fill a gap between hypermarkets and discounters for competitively priced grocery shopping. To this end the company has 1,284 local stores representing a market share of 12.8% of the total food store retail space in Spain.
- Mercadona sells a total of 8,000 products in its supermarkets, 2,500 of which are private labels, accounting for almost 50% of its total sales. The company sells a number of own-brand ranges such as Hacendado for groceries, Bosque Verde for drugstore items and Deli Plus for body care
- Mercadona stores offer customers a limited number of brands per product category, listing only the top 1 – 2 brands in the market, together with their private label. This strategy aims to heavily promote Mercadona's label by offering a high quality product at a price lower than competition.

#### TRANSPARENT INFORMATION

**HACENDADO**

**BOSQUE VERDE**

**Deliplus**

**Compy**

Since the development of its *Recommended Product* model with the Hacendado, Bosque Verde, Deliplus and Compy brands, as well as other items, Mercadona has clearly identified on the label the name of the integrated supplier that manufactures the product.



- To effectively carry this out, Mercadona enters into “life-time” agreements with manufacturers (*Interproveedores*) to manufacturer Mercadona’s private label. These *interproveedores* are clearly identified on each product packaging. In many cases, the relation between Mercadona and their *interproveedores* goes beyond a standard supplier/retailer relation with Mercadona investing directly in the suppliers business to boost production facilities for example.
- In 2009, the retailer launched a number of initiatives to lower their prices in response to the economic crises in Spain. Amongst these initiatives, was the reintroduction of the bulk sale of fruits and vegetables – as opposed to pre-packed - the addition of a more rational and efficient fish mix (tray and counter) and the sale of frozen meats. The company also decided to de-list 1,000 items during the course of the year which included 400 branded products, 400 Hacendado, Bosque Verde, Deliplus and Compy products, and 200 perishables – all of which were considered to have a lower stock rotation.

### 4.3.1 Pricing Policy

- Mercadona runs an EDLP strategy (every day low prices – “*SPB, siempre precios bajos*”), a pricing strategy adopted from Wal Mart in the 1960’s, aimed at keeping prices 3% below its competitors. This strategy is based on offering customers lower prices all year round instead of the classic promotions carried out during certain times of the year. Suppliers are therefore guaranteed high volumes but albeit at a reduced price and margin which Mercadona places a heavy emphasis on.
- In terms of the margins used by Mercadona, these are considerably lower when compared to competitors, ranging from 25% for high rotating products and 35% for frozen and chilled products.



- Mercadona doesn't distinguish its private label range in different quality tiers. All products fall under the same quality standard which is very high against other own label brands. Their food & drink label for instance, "Hacendado", is used in many cases as a benchmark when competitors carry out internal taste panels for own label developments.

#### **4.3.2 Promotional requirements and demands**

- Mercadona does not carry out any promotional activities during the year, nor do they require any. Instead they negotiate on net-net prices and margins vs RSP.

#### **4.3.3 Logistic structure**

- Mercadona operates eight main logistic centres in Spain, with a total storage area of 620,000 square metres (*source: Mercadona annual report*). The majority of the warehouses are located in the south of Spain (Malaga, Seville and Alicante), one in Valencia, one in Madrid and one in Barcelona for the North of Spain. The remaining two are based in the Canary Islands, supplying the 40+ establishments that Mercadona has in the Islands. Furthermore, Mercadona operates other minor warehouses situated in the Balearic Islands and León.
- All suppliers are asked to supply directly to Mercadona's regional depots.
- A recent development in Mercadona's supply chain strategy to reduce costs and tackle environmental problems is the agreement reached with Spanish Railway Company Renfe. Mercadona, which transports all its merchandise in trucks, is now changing part of its logistic needs to the use of trains. The agreement consists of Renfe carrying out the transport of merchandise between Seville and Valencia and Tarragona up to 2011, operating two weekly services in each of these routes, transporting 220,000 tonnes per year (416 trains per year, equating to 9,152 trucks)

### 4.3.5 From introduction to launch

- Gaining a listing with Mercadona is a complicated task given the strong presence of their private label range which represents almost half of total sales. Overall, the retailer has approximately 2,000 suppliers, 90% of which are national based, 100 of which are “interproveedores”. The strong emphasis on shelf space and rotation means that if an SKU doesn’t reach a daily/weekly target set by Mercadona, it will be delisted. Service delivery is also of up-most importance and a breach in service could lead to the de-listing of the brand/range.
- In terms of approaching Mercadona, manufactures are advised to contact the respective category manager/buyer for the specific product group, sending them a company presentation which should include company background, manufacturing capabilities, USP’s, etc, in the local language - It is advised to carry this out via email. Contact details can be obtained by calling the head office directly.
- If interested, Mercadona will invite the manufacturer to a meeting at their head offices in Valencia to discuss in further detail the proposition. Additional meetings will take place should Mercadona find the proposition interesting.



## 4.4 Carrefour

Group / Banner	Nº of stores 2009	Sales 09 (M.€)	% 08/09
Carrefour Group	3,095*	14,296.00**	-7%
<i>Carrefour</i>	281*		
<i>Dia</i>	2,814*		

\* Includes franchise operations

\*\* Estimated sales

Source: Green Seed table obtained from Alimarket data

- Carrefour was Spain's second leading grocery retail group in 2009 with an annual turnover of 14,296 million Euro (Carrefour and Dia soft discount sales combined) overtaken by Mercadona, despite their numerous banners and formats - for the purpose of this report, Dia stores will not be analysed as they have a separate buying department and logistic set-up than Carrefour stores.
- For years now, the French group has been trying to keep up with Mercadona's unstoppable growth, re-evaluating their retail structure to keep up with their pace. Their re-evaluation has led to the creation of three new formats, Carrefour mini-hypermarkets (compact version of Carrefour hypermarket), Carrefour Market (a new supermarket store) and Carrefour Express (small local neighbourhood stores aimed at convenience foods)
- As result of these changes have created synergies in terms of own label, supply chain and communication:
  - **Carrefour Hypermarkets:** average sales area between 8,000 to 9,000 square metres. Their shelves stock an average of 80,000 items plus fresh food counters and non-food departments. Carrefour Private label sales currently represent 28% of their total sales

- **Carrefour Mini-hypermarkets:** The format is designed for mid-size cities that do not have the capacity for a traditional hypermarket of 8,000 square metres plus. Sales area is between 2,500 and 4,000 square metres with a similar grocery offering to Carrefour Hypermarkets but a smaller focus on non-food. The strong commitment to pricing and promotional activity is also similar to what can be found in a classic Carrefour hypermarket.
- **Carrefour Market:** Introduced in Spain during May 2010 to gradually replace the Express fascia in a move to harmonize their brands internationally. The Supermarket has an average sales area of between 800 and 2,000 square metres, offering 7,000 SKUs (90% food, 10% non-food) and 1,500 private label SKUs (represent approx. 35% of sales) The prices are the same as in the hypermarkets.
- **Carrefour Express:** The Express brand is now used to replace the former Carrefour City stores – small neighbourhood stores, similar concept to Tesco Express in the UK. The store's have an average size of 450 m2 and stock approximately 4,000 references.

#### 4.4.1 Pricing Policy

- Carrefour offers an extensive range of innovative / chilled foods in their stores, positioning themselves as market leaders when it comes to innovation, keeping up with latest consumer market trends
- There were 9,000 private label references in the Carrefour stores in 2008 (both food and non-food) representing 30% of Carrefour's total revenue that same year. The retailer currently has 7 private label food ranges:
- Carrefour Selection (equivalent to Tesco finest, premium private label range), Carrefour discount (economy label, 5%-10% below market average), Carrefour Eco (organic range), Carrefour Calidad Tradición (High traceability products), Carrefour Nuestra Tierra (Regional Spanish foods manufactured by SMEs), Carrefour kids (70 references aimed at under 12 years olds in which they have a Disney license agreement) and Carrefour Ready Meals (60 ready meal references in ambient, chilled and frozen)



- Carrefour margins vary depending on the product category, but on average range between 30 to 35% for branded products and 40% for own label.
- As mentioned previously, when negotiating the unit price, Carrefour will build into the net price a percentage for merchandising services and annual commercial activities. A discount will also be applied on the net price given to them for making use of their logistic platforms. These are normally 2% for ambient products and 5% for chilled/frozen products.

#### **4.4.2 Promotional requirements and demands**

- The annual value of promotional support ranges between 8 and 10 percent of net invoiced value for own label propositions and can go up to 23 percent for branded products – amongst the highest in Spain.

- Trade and consumer investment in promotions such as leaflets, 3 for 2, second unit from 30 to 70% discounts, are commonly used throughout the year. Carrefour expects the manufacture to take part in promotions at least 3 to 4 times a year – agreed in the “plantillas”



- Additional promotional tools such as end-of-aisle displays cost in the region of 400 to 450 Euros per store for one to two weeks.
- Listing fees are part of the listing process in Carrefour. They vary depending on the product category, buyer and number of listed stores/formats. On average, the fees can go up to 6,000 – 8,000 Euros.

### **4.4.3 Logistic structure**

- The retailer's largest distribution centres are in Guadalajara and Seville, averaging 50,000 square metres in size. Carrefour has four frozen/fresh food warehouses in Madrid, Valencia, Barcelona and Seville, averaging 13,000 m2 in size.
- Orders are placed via EDI, emails or even fax in some cases.
- Deliveries are carried out to the centralised/regional depots at a specified date, time and dock number. If the supplier fails to deliver at the requested time they can be turned away and fined accordingly.
- Store to store deliveries can take place with international brands that are listed in Carrefour's 50 "tourist" supermarkets and hypermarkets based along the Costa del Sol and Costa Blanca. These products are listed by an international buyer dedicated exclusively to international brands – based in Madrid. Green Seed Spain recommends working with a local distribution partner should a listing be obtained as orders can range from as little as 2-3 cases per store.

#### **4.4.4 From introduction to launch**

- Carrefour's head office is based in Madrid where they negotiate for all Carrefour stores in Spain, including own label developments for the Spanish market – in some cases manufactures will be asked to go via Carrefour France. If not interested, Carrefour Spain can decide whether they are interested in the proposition or not.
- International / imported brands, have a specific buyer – based in Madrid – who handles all imported products, normally negotiated via a specialist distributor who represents international imported brands.
- Approaching Carrefour is done in a similar manner to Mercadona. Value added products/brands are put forward by contacting the respective category buyer via email and sending information about the product proposition, company background, etc. If the buyer is interested, they will organise an introductory meeting to discuss the proposition in further detail. Additional meetings will be organised if real interest is shown where prices, merchandising, logistics and promotions will be discussed. Please note the listing process can last several months – up to six months in some cases. Carrefour Spain also has the habit of changing and moving buyers to different product categories, even if they are involved in a negotiation process with a potential supplier. This will inevitably prolong the listing process – should the new buyer still be interested!
- Own label products are managed by a separate buying team who assign projects after carrying out a tender and inviting manufactures to participate. If successful, the manufacture will be invited to a meeting with the respective buyer, together with the packaging and quality department to discuss the product concept, product composition and packaging materials. Product launch can also take up to six months (or more).





## 4.5 Eroski

Group / Banner	Nº of stores 2009	Sales 2009 (M.€)	% 08/09
Eroski Group	1,664*	€ 7,606.65**	-6%
<i>Eroski</i>	1,298*		
<i>Caprabo</i>	356*		

\* Includes franchise operations


\*\* Estimated sales

Source: Green Seed table obtained from Alimarket data

- Eroski is the distribution Group of the Mondragon Cooperative - the world's largest worker owned co-operative - covering a wide range of food, non-food, wholesale and travel formats.
- The retailer is one of the few "larger" chains in Spain to belong to a buying group. In 2004, Eroski joined the Alidis buying group following Intermarche and Edeka in 2003, where they source their basic commodity products. The alliance focuses on several priorities such as mass food purchases, in order to mitigate the over-dependence on the large and powerful suppliers; best practice sharing among the three members; design of a common range of European products; common purchases of fruits and vegetables; supplier quality auditing and joint IT practices. The group is Europe's third largest purchasing structure.
- The Basque Company is Spain's third food distribution group with sales reaching 7,606.65 Million Euro in 2009, after the acquisition of the Catalan chain Caprabo – a strategic move aimed at strengthening their position in Madrid and Barcelona.
- Despite their jump as Spain's third largest grocery retail group, their sales figures dropped by 6% in comparison to 2008. According to trade sources, this drop is not only down to Spain's economic situation, but also because of their aggressive pricing policy which has seen their margins/prices drop in order to entice customers.

- The Eroski chain operates a total of 4 formats under the Eroski fascia:
  - **Eroski Hypermarkets** range from 4,000 to 12,000 metres squared, selling approximately 50,000 food and non-food product lines. The stores are fresh food orientated, offering a wide choice of ready meals. Eroski currently has 80 hypermarket stores.
  - **Eroski Center Supermarkets** are located in urban areas and on the edges of major cities. The stores, which vary between 700 to 2,000 metres squared, offer a range of fresh products, plus frozen and non-food, where the Eroski brand is predominant.
  - **Eroski City stores** are a smaller version of the Eroski Center concept, located in neighbourhood areas, selling around 3,800 products.
  - **Syp Mercat** are supermarkets based in the Balearic Islands where imported brands play a significant part given the number of tourist visiting the islands.

#### 4.5.1 Pricing policy

- In recent years, Eroski has put a lot of pressure on suppliers and margins in order to offer customers a cheaper alternative given the current crises – up to the point where Eroski's total sales value has decreased because of it.
- Margins vary depending on the product category, however they average between 30 to 35% for branded products, and 30 to 40% for own label.
- Own label sales account for 30% of Eroski's annual turnover with 2,100 references (4,000 including non-food). The group's strategy for the future is to increase their own label offer, particularly their fresh & chilled range.
- In addition to Eroski's current own label offering, which includes Eroski, Eroski Natur for fresh foods, Eroski SeleQtia for gourmet products and Sin Gluten for gluten free products, Eroski have recently launched a range called "*El Mas Barato*" (The cheapest).
 
- The "*El Mas Barato*" range is a new range of products that permanently offers a 30% saving on more than 1,200 basic items covering fresh foods, vegetables and cleaning products.

### **4.5.2 Promotional requirements and demands**

- Promotions and listing fees are two requirements that are negotiated on a yearly basis at the Eroski head office.
- Listing fees vary depending on the number of stores and references.
- Promotions are agreed at the beginning of each year, based on yearly net sales – normally 10% of total sales.
- End of aisle displays, price promotions and leaflet campaigns are carried out throughout the year.

### **4.5.3 Logistic Structure**



- Eroski operates a total of 24 logistic platforms, 17 for fresh foods, 13 for food and 3 for non-food
- Larger outlets are supplied directly by the manufacturers whilst fresh products are supplied by one single contractor. For its supermarkets, the group operates seven distribution centres. Operators subcontracted include SDF Iberica and DHL.
- For own label products, in many cases Eroski will pick up the order from the manufacturers warehouse in order to reduce costs and margins.

#### 4.5.4 From introduction to launch

- For branded product propositions, a similar approach is required as stated in parts 4.2.4 and 4.3.4.
- For private label products, the majority of commodity products will go via the buying group Alidis in the form of a tender. To take part you must be invited by Eroski or Alidis. Once in the tender, the manufacturer will be sent a document called “*Alpha*”, in which all the product requirements are outlined. If the manufacturer can meet all required specs, there will be a second stage involving a taste panel and then price/volume negotiations.
- In terms of value added propositions for private label, these go via Eroski’s head office in Elorrio – Bilbao, north of Spain. Again, these are assigned after having carried out a tender in which the manufacturer needs to be invited to. The manufacturer will be asked to send samples and a price quotation. If successful, a “*plantilla*” will be negotiated in which promotions, merchandising and logistics are agreed upon – as mentioned earlier, Eroski prefers to collect from the manufacture as a way to keep unit costs down.
- Concerning Syp Mercat, manufacturers should contact their head office based in Mallorca as they have a separate buying department. Products are delivered to their Balearic Island platform based in Palma.



## 4.6 Alcampo

Group / Banner	Nº of stores 2009	Sales 2009 (M.€)	% 08/09
Alcampo	178*	4,684.00*	-5%
Alcampo	50		
Sabeco / Simply	128*		

\* Includes franchise operations

\*\* Estimated sales

Source: Green Seed table obtained from Alimarket data

- French group Auchan is Spain's fourth largest grocery retailer in terms of sales (4,684 million Euro in 2009) operating in both the Hypermarket and Supermarket sectors with the Alcampo and Sabeco/Simply banners.
- Alcampo Hypermarkets average 10,000 square metres in size, carrying up to 40,000 product lines with a high proportion of non-food, especially clothing. The chain is active throughout Spain with Madrid being the most important region.
- Sabeco supermarkets are located in town centres and range between 800-1,500 square metres. Since 2006, the French group has launched a new supermarket concept under the Simply banner, replacing a number of the current Sabeco stores (32 stores transformed last year). The new Simply Market supermarket concept is focused only on food. The key strength of the new concept is fresh produce, offered in self-service and modern surroundings. Structured into colour-coded groupings (for fresh produce, beauty and baby products, wines, etc.), the range is made up of national brands, private label (Auchan) products and value-line products. The stores carry out promotions on a yearly basis, with “*permanently low prices*”, special offers (a deeply- discounted product offer every fortnight) and “*products to try*”, especially as part of seasonal promotions.



### **4.6.1 Pricing Policy**

- Both Alcampo hypermarkets and Sabeco Supermarkets offer around 7,200 private label references in their stores, accounting for 15% of their annual turnover. 900 of their own label range are “*first price*” products (Primer Precio), which are characterised by a thumbs-up symbol. Their price is positioned 40% to 50% cheaper than the leading brands. The remaining products are Auchan labels, represented by the red bird, symbol of the Auchan banner, and positioned 10% to 15% cheaper than leading brands.



- An interesting aspect of Alcampo's pricing policy is that each store has the freedom to set its own RSP once a net price has been negotiated at the head office. This allows each store to respond to low stock rotations accordingly and with complete autonomy – unless there is a price promotion.
- In terms of the margins used by Alcampo, these vary according to product type/category, but on average range from 35% for branded products and 40% for own label.

### **4.6.2 Promotional requirements and demands**

- In-store promotions and leaflets – both national and regional – are carried out throughout the year with four major sales reductions of 25 to 35% in its Sabeco / Simply stores and seasonal offers in its hypermarkets.
- Leaflet campaigns cost in the region of 90 Euro per item/per store.
- End of aisle displays are 390 Euro per store/per week.
- Listing fees in Auchan are also required. These are negotiated with the buyer once the listing has been agreed – normally around 100 to 120 Euro per store.

### **4.6.3 Logistic Structure**

- Alcampo products are distributed through a total of 5 logistic centres, two of which are operated by themselves whilst the remaining are operated by DHL Exel and FCC Logistica. The biggest centre is based in Madrid with a surface of 56,000 square metres, specialising in the storage of non-food products, supplying all hypermarkets and supermarkets in Spain (including the Balearic & Canary Islands). In terms of fresh foods, Alcampo has a 4,500 square metre warehouse in Madrid operated by FCC Logistica.
- Orders are placed via EDI or emails.

### **4.6.4 From introduction to launch**

- Alcampo's buying department is based in Madrid. Approaching them for branded products is done in a similar manner as outlined in chapter 4.2.4.
- Own label and commodity products are managed by a separate buying team. Depending on the product and category, negotiations will sometimes be done via Auchan in France.



## 4.7 El Corte Ingles

Group/Banner	Nº of stores 2009	Sales 2009 (M.€)	% 08/09
El Corte Ingles	356	4,630.00*	-5,8%
Hipercor	37		
Supercor	83		
El Corte Ingles	54		
Opencor	182		

\* Estimated sales

Source: Green Seed table obtained from Alimarket data

- Spanish retailer El Corte Ingles is ranked fifth in the grocery retail market with a turnover of 4,630 million Euros in 2009, representing a decrease of -5.8% from the previous year.
- The company operates a wide range of formats, from department stores, hypermarkets, supermarkets, travel agencies, petrol forecourts, etc.
- In the last few years, ECI has diversified into smaller formats to tackle the restrictive planning regulations enforced by the government. As a result, the retailer is focusing in opening Supercor stores (neighbourhood supermarket stores with 4,500 references, 1,300 of which are own label food and non-food products) and Opencor convenience stores. Opencor convenience stores are located within major Spanish cities, operating 18 hours per day, 7 days a week, 365 days per year. The stores are approximately 500 square metres in size, offering around 8,000 food and non-products references with chilled ready meals playing an important role.
- Overall, El Corte Ingles stores attract a more affluent, older customer base in comparison to other retailers in Spain. Customers are generally highly educated and fall into social class A and/or B. Their stores offer an extensive range of products, including food and non-food, international brands, gourmet products and an extensive array of fresh foods and counters.



### **4.7.1 Pricing policy**

- El Corte Ingles could be described as the Waitrose of Spain in grocery retail terms, offering consumers a wide range of premium products within branded and private label lines, competing in quality rather than price.
- However, in recent years, El Corte Ingles has had to re-adjust its pricing strategy to respond to the current economic situation and price-cutting strategies adopted by other Spanish retailers and discount stores. As part of their strategy, in October 2008 the retailer launched a range of 400 “first price” products under the new Aliada brand covering basic food products.
- Margins in El Corte Ingles vary from 30-35% for branded products (VAT not included) and 30 to 60% for own label, depending on the product category. Basic foods for instance – such as cereal, milk, etc – have lower margins in comparison to value added products , which can be as high as 60%.



### **4.7.2 Promotional requirements and demands**

- El Corte Ingles places heavy emphasis on promotions, forcing manufacturers and suppliers to carry out a number of different promotions throughout the year, which are agreed in the annual “plantillas”
- The amount expected to be invested is 10 to 15% of the estimated annual sales value (fixed by the buyer) If actual sales surpass the estimated figure, the buyer will increase the promotional investment automatically.
- End of aisle displays and promotional leaflets – which include a 10% price discount – are commonly carried out, lasting between 1 to 2 weeks.

- Listings fees, as in all retailers based in Spain, are also required in El Corte Ingles. The fee is calculated on a per store / per reference basis, the value being 2 to 3 cases per store / per reference. If the listed product has a high rotation, the buyer will increase the number of store listings automatically, assuming the manufacture and /or distributor will accept the listing fee cost.

#### **4.7.3 Logistic Structure**

- ECI operates two large distribution centres located in Valdemoro (Madrid), 400,000 square metres, (main logistic centre sourcing over 550 stores and 650,000 products) and Montornes del Valles (Barcelona) 200,000 square metres. The Warehouse in Barcelona supplies its stores located in Catalonia, Valencia, Murcia and the Balearic Islands whilst the rest of mainland Spain is stocked from Madrid. The structure is completed with local distribution centres, including two for the Canary Islands.
- All suppliers who have a valid EDI certificate will deliver orders to the logistic depots based in Madrid or Barcelona. From there, ECI redistributes to their regional platforms.
- If a supplier doesn't have an EDI certificate, deliveries would need to be done on a store to store basis.

#### **4.7.4 From introduction to launch**

- Approaching ECI is done in a similar manner as outlined in point 4.2.4, with the only difference being that the category manager / buyer is responsible for both branded and own label products. Contact details can be obtained by simply calling the head office. Once contact details have been obtained, the proposition should be sent via email or post, together with information on the company background. If interested, the buyer will contact the manufacturer to arrange a meeting to discuss in further detail – samples may be requested as well. If there is no response, the manufacturer should contact the buyer until concrete feedback is received. In many cases, product propositions, presentations, samples, etc do not reach the intended person.
- For own label products, tenders are normally carried out, inviting manufacturers to compete against each other. In some cases however, the category manager will allocate an own label range to a current branded supplier, overseeing the tender process. This tends to be the case with very niche / innovative products.
- Once the category manager expresses his interest in listing a brand/allocating a private label range, the second stage involves negotiating the conditions of the supply agreement in the yearly “plantillas”. This will involve negotiating a net price, annual promotions, merchandising expenses, discounts, etc. This process is normally done within a few weeks.

## 5 Additional sources of information and references

### **5.1 Research**

#### **Consumolab (qualitative and quantitative research)**

C/ General Díaz Porlier, 45 bajo

28001 Madrid

Tel: +34 91 3096611

[www.consumolab.ainia.es](http://www.consumolab.ainia.es)

The logo for Consumolab, featuring the word "consumolab" in a lowercase, sans-serif font. The letters are colored in a gradient: 'c' is green, 'o' is yellow, 'n' is blue, 's' is green, 'u' is yellow, 'm' is blue, 'o' is green, 'l' is yellow, 'a' is blue, and 'b' is green.

#### **Nielsen Spain**

Nielsen

Salvador de Madariaga, 1

28027 Madrid

Tel.: +34 91 377 72 00

[www.es.nielsen.com](http://www.es.nielsen.com)

The Nielsen logo, consisting of the word "nielsen" in a lowercase, sans-serif font. The letters are blue, and there are seven dots below the word, aligned with the letters.

#### **IRI Spain**

C/ Princesa, 47 - 7ª 28008 Madrid

Tel: +34 91 548 80 80

[www.symphonyiri.es](http://www.symphonyiri.es)

The logo for Symphony IRI Group, featuring a red arc above the text "Symphony IRI Group". The word "Symphony" is in black, "IRI" is in red, and "Group" is in black.

### **5.2 Taxes and duties**

#### **Agencia Tributaria**

Calle de Guzmán 'El Bueno', 139,

Madrid

Tel: +34 915 826 767

[www.aeat.es](http://www.aeat.es)

The logo for Agencia Tributaria, featuring a stylized 'A' made of blue and yellow curved lines. Below the logo, the text "Agencia Tributaria" is written in a serif font, underlined.

### **5.3 Packaging and labelling**

#### **Ecoembes**

C/ Orense 4, 8ª planta

28020 Madrid

Tel: +34 915 672 403

[www.ecoembes.es](http://www.ecoembes.es)



### **5.4 Electronic Data Exchange**

#### **GS1 Spain - AECOC**

Ronda General Mitre, 10

08017 Barcelona

Tel: +34 93 2523900

[www.aecoc.es](http://www.aecoc.es)



### **5.5 Retailers**

#### **Mercadona**

C/Valencia, 5

46016 Valencia

Tel: +34 93 2523900

[www.mercadona.es](http://www.mercadona.es)



#### **Carrefour Spain**

P.I. LAS MERCEDES

C/ CAMPEZO, 16

28022 Madrid

Tel: +34 913018900

[www.carrefour.es](http://www.carrefour.es)



**Eroski**

Barrio San Agustín S/N  
Elorrio  
48230 Vizcaya  
Tel: +34 946211211  
[www.eroski.es](http://www.eroski.es)



**Auchan**

Santiago de Compostela Sur  
28029 Madrid  
Tel: +34 917306666  
[www.alcampo.es](http://www.alcampo.es)



**El Corte Ingles**

C/ Hermosilla 112  
28009 Madrid  
Tel: +34 914018500  
[www.elcorteingles.es](http://www.elcorteingles.es)



**Dia**

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28232 Madrid – Las Rozas  
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[www.dia.es](http://www.dia.es)

