

SPAIN INDIA 2020

A joint reflection on the past,
present and future
of our bilateral relations

WORKING PAPER 6

Tourism, food and gastronomy



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The King and Queen of Spain during their visit to the stand of India at FITUR 2018.

6.1.

Framework of relations in the field of tourism, food and gastronomy

Cooperation in terms of tourism between Spain and India was institutionalised in 2009 with the signing of the MoU between the Ministries of Industry, Tourism and Trade of Spain and the Ministry of Tourism of India. The office of the Spanish tourism institute, Turespaña, was also opened in Mumbai on that same year. However, the driving force of this bilateral exchange has been the annual celebration of the International Tourism Fair (FITUR, by its Spanish acronym) in Madrid. The visits to Spain of high-level Indian delegations within the framework of FITUR, including the visit of the Indian Ministers of Tourism, K. Chiranjeevi in 2013 and K. J. Alphons in 2018, has fostered a much higher rate of official interactions compared to other areas of bilateral relations. Within the framework of the joint declaration of Association for Peace, Growth and

Innovation between Spain and India (APCI, by its Spanish acronym) signed in 2017, Prime Minister Modi and President Rajoy acknowledged the enormous potential to strengthen cooperation in the field of tourism and decided to create a panel of three experts representing governments, industries and technological sectors, who have met in two occasions to date, in 2017 and 2019.

Indian tourism in Spain has grown exponentially in the last decade. The turning point in the reception of Indian tourists in Spain was marked by the premiere of the movie filmed in Spain, *Zindagi Na Milegi Dobara*, which led to an 81% increase in the number of Indian tourists after its premiere. Over the past years, the number of Indian travellers to Spain and the number of Spanish travellers to India have grown at a steady pace (see Illustration 44). However, collaboration between the tourism industries, two non-competitive business fabrics with numerous synergies, has not yet been sufficiently explored.

Bilateral cooperation in the field of food and agriculture was also established in 2009 with the agreement on agriculture and related sectors between the Ministry of Environment and Rural and Marine Affairs of Spain and the Ministry of Agriculture of India. The establishment of the Agriculture, Fisheries and Food Department in New Delhi in 2014 has represented a reinforcement of the relations between both countries. Among the main pending agreements, Spain has shown its interest in agreeing to a bilateral protocol with the Indian authorities to remove the phytosanitary barriers to Spanish fresh products, within the Indian Plant Quarantine enforced since 2003.

India's interest in the Spanish technology and innovation within the food and food-processing sectors was confirmed with the 2018 visit by H. K. Badal, former Minister of Food-Processing Industries. The success of the Spanish technological participation in the value chain of food processing and packaging in India in light of the new challenges posed by COVID-19, the contribution of Spanish companies to the growth of the sector through numerous investment projects and the positioning of Spanish products, including olive oil, in India's new-found interest in healthy diets, all confirm the immense sectoral synergy.

ILLUSTRATION 44 / Compared perspective of tourism exchanges between Spain and India

Growth of international tourism to Spain from 2016 to 2018

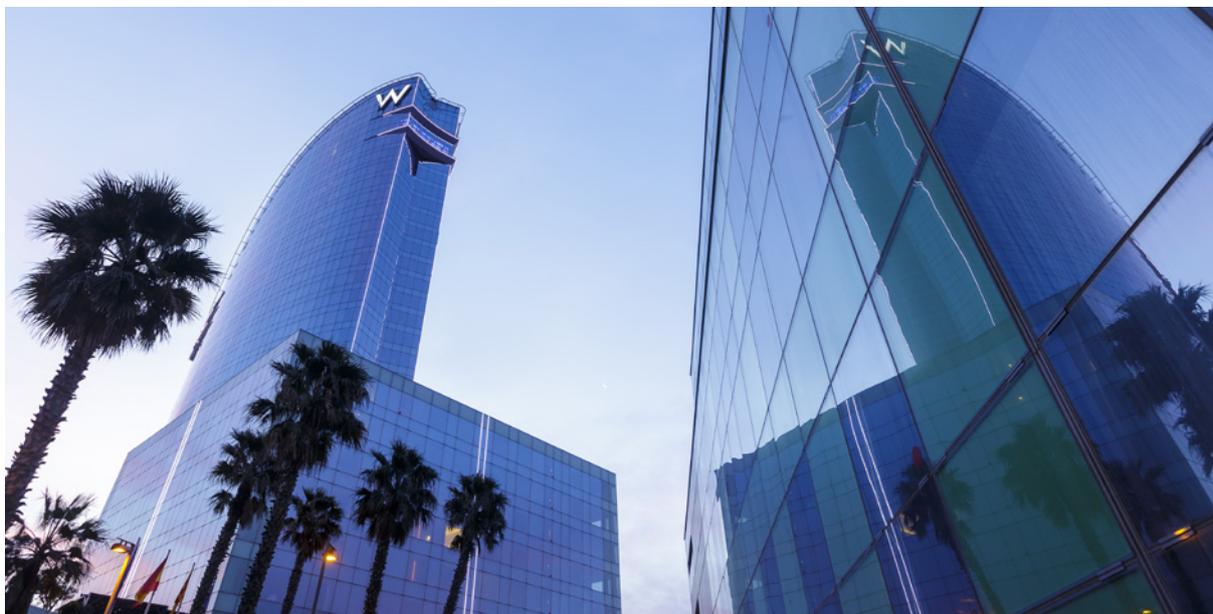
Country of origin	Tourists in 2018, in thousands	Tourists in 2017, in thousands	Tourists in 2016, in thousands	Growth of tourism to Spain from 2016 to 2018, %
1 India	222.6	139.8	105.6	110.8%
2 China	646.4	514.8	374.8	72.5%
3 South Korea	486.9	446	312.4	55.9%
4 Brazil	560.9	467.5	372.8	50.5%
5 Japan	547.2	444.5	463.4	18.1%
6 Canada	445.8	488.2	390.8	14.1%
7 Israel	316.4	269.3	312.6	1.2%
8 Turkey	289.8	290.3	297.6	-2.6%

Source: National Statistics Institute/Frontur

Growth of tourism from the UE to India between 2016 and 2018

EU Countries	Tourists in 2018, in thousands	Tourists in 2017, in thousands	Tourists in 2016, in thousands	Growth of tourism to India from 2016 to 2018, %
1 Portugal	74.5	66.4	54.4	36.9%
2 Italy	126.9	111.9	95.4	33%
3 Netherlands	81.6	76.7	71.8	13.6%
4 Spain	84.4	81.4	76.3	10.6%
5 Germany	274.1	269.4	265.9	3.1%
6 France	261.7	249.6	258.7	1.2%

Fuente: Ministry of Tourism, Government of India



The Indian tourist continues to be one of the biggest daily spenders. In the image a luxury hotel in Barcelona.

6.2.

The dimension of tourism exchanges between Spain and India

Tourism is an essential pillar for the Spanish and Indian economies. In 2019, tourism contributed 6.8% of the Indian GDP, with an annual growth of 4.9%, generating 8% of total employment. In the case of Spain, it represented 14.3% of the GDP, with an annual growth of 1.8%, generating 14.6% of the total employment (Online Database, World Travel & Tourism Council, 2020). The impact of the COVID-19 pandemic on both tourism industries has been unprecedented. The digital campaigns to restore the image of Spain and India as safe and attractive destinations will have to be visionary and ambitious in the upcoming months. In the case of Spain, the success of its tourism promotion in 2011 after the participation of Turespaña in the film *Zindagi Na Milegi Dobara*, main landmark in bilateral knowledge and Spain's most effective tourism campaign in India –and possibly in the world– shows the

effectiveness of tourism promotion campaigns in Southern Asia and their return on investment (see In Detail 18). The Swiss promotion campaign in India #inLOVEwithSWITZERLAND, with the participation of Bollywood actor Ranveer Singh, managed to increase the overnight stays of Indian tourists by 25%, becoming a new example of the success in partnering with Bollywood.

Out of the 83.7 million tourists who visited Spain in 2019, more than 210 thousand came from India, reaching more than 200 thousand annual tourists for second year in a row. Between 2016 and 2019, the number of Indian tourists visiting Spain has doubled, a similar growth to tourists coming from Korea in the same period and far beyond the visits from other countries like Japan or China. However, the power of attraction of Indian tourism is still far from having reached its full potential. The number of tourists coming from India is far lower than from those three Asian countries, with more than 600 thousand tourists per year, or than from other emergent destinations like Brazil and Turkey (Frontur, 2020). These numbers are also well below

ILLUSTRATION 45 / Compared perspective of expenditure of Indian tourists in Spain**Growth of the average daily expenditure of trips by Indian tourists in Spain from 2016 to 2019, in euros**

2019	359
2018	387
2017	319
2016	302
Growth from 2016 to 2019	18,9%

Source: National Statistics Institute / Egatur

Average daily expenditure in Spain of international tourists resident in long-haul countries in 2019

	Country of origin	Average expenditure per person, in euros	Average duration of trips, in number of days	Average daily expenditure per person, in euros
1	Japan	1,985	4.77	416
2	India	1,863	5.18	359
3	Korea	2,266	6.43	352
4	Israel	1,526	4.54	336
5	China	2,409	7.87	306
6	Turkey	1,411	5.03	280
7	Brazil	1,583	5.84	271
8	Canada	1,805	7.02	257

Source: National Statistics Institute / Egatur

the more than 550 thousand Indian tourists who visited Italy in 2018, the more than 520 thousand who visited France in 2017, the more than 350 thousand who visited Switzerland in 2018 or the almost 290 thousand who visited Germany in 2018 (European Travel Commission, 2020).

Indian tourists passed an average of 5.18 days in Spain, in which they spent an average of euros 359 a day. Between 2016 and 2019, the total expenditure by Indian tourists has dropped by 22%, the same as their average stay, which have dropped by 2 and a half days. This leads to think that more and more Indian middle-class tourists with a high-aspirational component are visiting

Spain. Indian tourists are still among the tourists who spend the most in Spain per day, only outranked by the euros 416 spent by Japanese tourists per day, and exceeding the euros 352 spent by Korean tourists per day, euros 306 spent by Chinese tourists or the average expenditure of tourists from other emerging countries like Canada, Israel, Brazil or Turkey (Egatur, 2020) (see Illustration 45). This Indian tourism, essentially formed by families and with the major cities as main destinations, is mainly interested in fashion, technology and sports articles while shopping.

More than 17.5 million international travellers visited India in 2018, 3.7% more than the previous year. 6.8 million of the total correspond to the Indian diaspora living abroad. The remaining 10.6 million foreign travellers represent a 5.2% growth compared to the previous year. Of this total, 62.4% travelled for tourism, 16.3% for business reasons and 6.1% for health tourism (Ministry of Tourism of India, 2019). These total numbers of tourists are well below the figures of other Asian destinations like the island of Bali, which had doubled the tourists than all of India in 2017 (Capa India, 2018).

84,356 Spanish tourists visited India in 2018, with a 3.5% growth compared to the previous year, below the 274 thousand German tourists, 261 thousand French tourists, or 126 thousand Italian tourists during the same year. Of the total Spanish tourists who visited India in 2018, 73.7% travelled for holidays while 19.2% travelled for business, and 6.1% represented the Indian diaspora in Spain. If we compare these figures with other European countries, the percentage of business travellers is well below the Netherlands' 32.7%, Germany's 31.8% or Italy's 25.3%. Figures are also lower when we talk of Indian diaspora, who represent 46% in the case of Portugal, 13.7% in the case of Italy or 10.2% in the case of Germany (Ministry of Tourism of India, 2019).

Zindagi Na Milegi Dobara, the film that placed Spain in the map

The director **Zoya Akhtar**, who received an award from the **Spain-India Council Foundation**, and the producer Excel Entertainment chose Spain to shoot the movie *Zindagi Na Milegi Dobara* (You only live once, in Spanish), about the adventures of three friends during their trip around Spain, where they get to know the city of Barcelona, the Costa Brava, the *tomatina* of Buñol, Andalusia or the *Sanfermines* of Pamplona, among other Spanish tourist hotspots.

Key factors in the choice of Spain as film location included the support of Spanish technicians, like the line producer Fernando Casas, and **Turespaña's commitment** to finance and to support the film, following the success that other Bollywood productions had enjoyed in the projection of destinations abroad, like the film *Don 2* in Berlin. The project fitted the Spanish tourism strategy, as the locations showed the tourism diversity of Spain for a tourist market –Southern Asia– that had hardly been explored until now and with lots of future projection. Turespaña supported the film production financially, suggested and facilitated the filming in some locations and

included an advertising spot at the beginning of the film.

Zindagi Na Milegi Dobara, a success in all the Southern Asia countries and in some countries of Anglo-Saxon culture during its premiere in 2011, obtained the impact on tourism it had expected. The choral interpretation by well-known Bollywood actors acclaimed by the local audience attracted a major public. The music worked very well with the music taste of the subcontinent, including the song with a touch of flamenco *Señorita*. The Indian youth identified with the aspirational message and Spain was represented as a diverse, attractive, cosy and fun-loving country. **Between 2011 and 2012, Indian tourism grew by 81% in Spain**, with up to 61 thousand Indian tourists filling up the *tomatina* of Buñol and Barcelona

(Tourism Studies Institute, 2013a).

Ten years later, the tourism offices of Andalusia still offer a route around the places where the film was shot, like Alájar, Ronda or Seville, and in India they still talk about the film when someone mentions Spain. In the surveys and interviews carried out by the Spain-India Council Foundation for this report, *Zindagi Na Milegi Dobara* is still present as the **main bilateral landmark and the best campaign of Spain in India** to date. Although it seems complicated to repeat the success, as at that time exceptional circumstances lined up –including financing availability, a script that represented the diversity of Spain and a film that caused a sensation among the Indian youth–, it would be worth the trouble to support and promote a second part, perhaps in this case starring Indian actresses.





Delhi airport is the main gateway for Spanish tourists to India.

6.3.

The role of visas, agents and promotion in bilateral tourism

The rise in bilateral tourism has also been reflected in the issuing of visas. Spain issued 67,695 Schengen visas in 2019, with a 10.3% growth compared to 2018, and 61,393 visas in 2018, with a 25.6% growth compared to 2017. Visas issued by the Embassy of Spain in New Delhi and the Consulate General of Mumbai have grown by almost 300% in the last ten years (see Illustration 46). The refusal rates of Schengen visas, below 10%, show that there is a high percentage of legitimate travellers, far beyond figures of neighbouring countries like Pakistan or Bangladesh, where there were more than 30% of refusal rates in 2019 in their respective embassies. Spain is the sixth country of the Schengen area in visa issuance, behind France, with 356 thousand; Germany, with 178 thousand;

Switzerland, with 160 thousand; Italy, with 93 thousand; and the Netherlands, with 84 thousand (European Commission 2020).

The COVID-19 pandemic, which has closed down the Schengen borders to Indian citizens and the Indians borders to European citizens, have led to a standstill in the processing of visas by both countries. The drop in the number of short-term visas issued has therefore been drastic. Indian citizens who obtained a Schengen visa to travel to Spain during those months, and whose visa expired without being able to travel, have been offered to apply for a new visa without having to pay again for the official fees of the Ministry of Foreign Affairs, European Union and Cooperation of Spain (BLS, 2020).

The growth in the last ten years of the issuing of visas before the COVID-19 pandemic, which has increased its figures fourfold, and of the personnel dedicated to processing them, has not been matched by an increase of facilities. This structural limitation, together with the administrative strain generated by the increase of applications, can have generated bottlenecks in the processes that lead to a delay in the delivery times. Given the expeditious processing of other European consular sections, it is probable that Indian businessmen and tourists have opted for applying for their visas in those countries. Since the regulations establish that the first entry into the Schengen area has to be done through the country issuing the visa, these delays can cause a deterrent effect in the Spanish attraction of Indian tourism.

Spanish tourists arrived in India by airplane in 98.5% of the cases, landing in the airport of Delhi in 61% of the cases, with an average stay of 17 days, a third of them between July and September (Ministry of Tourism of India, 2019). Spanish travellers in India therefore make long trips that cover different tourist routes throughout the whole

country. There are numerous Spanish and Indian tour operators offering different tourist packages in India, including cultural and nature trips, but also tours dedicated to spirituality and wellbeing or even cooperation and solidarity. Tourist packages are mainly focused on the golden triangle of the north of India (Delhi-Agra-Jaipur) and the western coast, from Mumbai to Kerala.

The role of agencies and tour operators is essential for turning trips to India into a unique experience. Although trips are mainly made during the summer months, when temperatures and humidity and rain levels are higher due to the monsoon, with the consequent health risks, comments by travellers after the trips are normally very positive. They value the experience as a whole thanks to the cultural and social diversity of India. Agencies like Diva India maintain contact through digital meetings with groups that have visited India, showing the bond that these trips generate between India and its visitors.

Turespaña, which opened an office in Mumbai in 2009, carries out an important promotional work with tour operators, including direct and inverse missions and through social networks and specialised media. Specific actions are also carried out in collaboration with tourist patronages, like the one carried out in 2017 by the Heritage Cities group or Costa del Sol in 2020. Indian tourism is still mainly focused on large cities, where Barcelona is the most recognised and sought-after destination. Other destinations are also thriving, like the increasingly demanded cultural tourism—with trips from Madrid to Toledo, Segovia or Avila—, the highly appreciated Spanish-Muslim heritage in Andalusia—Seville, Granada and Cordoba—, or sea destinations like Costa del Sol or the Balearic Islands, where Ibiza is still the aspirational destination of beach and leisure among the new generations.

Over the past few years other types of tourism

ILLUSTRATION 46 / Compared perspective of Schengen visas issued by Spain in India and other Schengen countries

Growth of visas issued by Spain in India between 2010 and 2019			
	2017 to 2018	2018 to 2019	2010 to 2019
Embassy of Delhi	32.82%	25.96%	188%
Consulate General in Mumbai	21.70%	1.15%	444%
Total	25.56%	10.27%	296%

Source: European Commission

Visas issued by the main Schengen countries in India in 2019			
	Applications	Issued	Refusal rates
France	405,256	356,043	12%
Germany	216,911	178,401	18%
Switzerland	171,004	160,825	6%
Italy	117,493	93,876	20%
Netherlands	93,812	84,683	10%
Spain	74,028	67,695	9%
Greece	44,366	36,444	18%
Austria	36,488	34,287	6%

Source: European Commission

have also experienced an increase, including meetings, incentives, conferences and exhibitions (MICE), especially to attend the major conferences like the Mobile World Congress or FITUR, and incentive trips by Indian multinationals in Spain. Shristi Mittal's three-day wedding in Barcelona in 2013 positioned Spain as a destination for Indian weddings abroad, increasingly sought-after by Indian families with greater purchasing power. Cruise tourism, with origin in Barcelona; gastronomical tourism, with a special appeal for the Basque Country; adventure and experiences tourism, with the *tomatina* of Buñol as the highlight; or itineraries by car along the Costa del Sol and Andalusia have awakened a growing interest among Indian tourism.



Air India operates direct flights between Delhi and Madrid.

6.4.

Bilateral alliance in innovation and tourist connectivity

Spain is not only the second destination of global tourism (UNWTO, 2020), it is also leader in the ranking of tourism competitiveness. India has also climbed six positions in the last year, currently ranking 34th (World Economic Forum, 2019). The progression of both countries in terms of tourism has been dizzying in recent years. In just one decade, India has doubled the number of tourist arrivals –from 5 million to practically 11–and has experienced a significant

improvement in tourism competitiveness, rising from 62nd to 34th in the ranking. Meanwhile, Spain has passed from receiving 52.2 million tourists to almost 84 million, and has climbed five positions in the ranking of tourism competitiveness, becoming the world leader (see illustration 47). As headquarter of the World Tourism Organization (WTO) and of the main fair of the sector, Madrid has also become the focus of the current debate on the promotion of a safe, sustainable and innovative tourism after the COVID-19 pandemic (see Case 12).

The innovative and pioneering tourism industry, which has developed Spain as one of the

leading destinations in global tourism, is highly internationalised. The Spanish companies of the hotel sector, leaders in Europe and Latin America, like Meliá, NH Hotels, Globalia, Barceló, Iberostar or Riu, are not present in India. However, tour operators and specialised Spanish agencies have opened offices in India, including **Viajes Catai**, with office in Delhi since 2007, or **Sociedad Geográfica de las Indias**, also with an office in the Indian capital.

In the technology and tourism innovation sector, two of the main Spanish technology companies of the sector, Amadeus and Hotelbeds, have been internationalised in India for several years. **Amadeus**, world leader of information services, reservations and technological solutions for tourism, with head office in Madrid, is present in India since 1994, with central offices in Delhi and a centre for innovation in Bangalore. The company, which has strategic agreements with Indian technology companies of the sector like Cleartrip, MakeMyTrip, Goibibo, Yatra or PayTM, signed a new agreement with Air India in 2020 for the suppliers to access the content of the airline through the Amadeus Travel Platform, renewing the previous agreement that ended in 2018. The company **Hotelbeds**, with head office in Palma de Mallorca and world leader bed bank through its platform to connect hotelkeepers with operators and agents, has been present in India since 2006, its second main market in Asia after China.

India, in addition to important luxury hotel chains like Taj Hotels and Oberoi Group, also has one of the main world startups of the sector. The Indian company **Oyo Hotels & Homes**, leading technological platform in the hotel sector through a collaboration and franchising model, started its activity at the end of 2018 in Spain and in less than 12 months it obtained a portfolio of 100 hotels and more than 300,000 guests. In 2019, Oyo Hotels & Homes and Hotelbeds signed

an agreement of collaboration and access to their respective portfolios. These partnerships between the tourism industries of Spain and India not only have an opportunity with their innovative and digital companies, as shown by the agreement between Oyo and Hotelbeds, but also between their hotel companies. As they are established in different global markets, they are not direct competitors.

In 2016, Spain and India signed the bilateral Memorandum of Understanding for the implementation of the 2008 Horizontal Agreement EU-India in Nassau, and another one in the field of civil aviation in 2017. This establishes a strong legal and cooperation framework. Spain is an aviation hub between Europe and Latin America, whose main airlines –Iberia and Air Europa– cover the main transatlantic connections between both regions. India was not only the domestic market of aviation with the highest global growth in 2018 for the fourth consecutive year, but it has also become a regional hub where the main global airlines operate (IATA, 2019).

Since its flag carriers do not have bilateral destinations as one of their geographical priorities, one of the main problems of bilateral tourism is the lack of air connectivity between Spain and India. The launching of a new direct flight between Delhi and Madrid in December 2016 by **Air India** represented the greatest bilateral landmark in this regard. Not only is it necessary to consolidate and increase the frequency of this connection after COVID-19, as it has currently been interrupted, but also to promote new routes that unite cities like Barcelona or Mumbai. These direct flights are essential for intensifying the exchanges between the civil societies, especially in the sectors of tourism and business.

ILLUSTRATION 47/ Spain-India indicators as global destinations, in tourism competitiveness and growth of the aviation sector

Inflow of tourists, in millions			Travel & Tourism Competitiveness Report, ranking of 140 countries		
	2009	2019		2009	2019
Spain	52.2	83.7	Spain	6	1
India	5.17	10.93	India	62	34

Source: Tourism Studies Institute; Ministry of Tourism of India; UNWTO

Source: World Economic Forum

Growth of passenger traffic in Indian airports between 2016 and 2019, in million passengers

2017		2018		2019		Growth of passenger traffic between 2017 and 2019, %	
National passengers	International passengers	National passengers	International passengers	National passengers	International passengers	National passengers	International passengers
205.7	59.3	243.3	65.5	275.2	69.5	33.8%	17.2%
Total, in million passengers		Total, in million passengers		Total, in million passengers		Growth of passengers between 2017 and 2019, %	
265		309		345		30.2%	

Source: Airports Authority of India

Growth of passenger traffic in Spanish airports between 2016 and 2019, in million passengers

2017		2018		2019		Growth of passenger traffic between 2017 and 2019, %	
National passengers	International passengers	National passengers	International passengers	National passengers	International passengers	National passengers	International passengers
73.1	175.3	80.8	183.1	85.5	188.8	17%	7.7%
Total, in million passengers		Total, in million passengers		Total, in million passengers		Growth of passengers between 2017 and 2019, %	
249.4		263.9		275.2		10.3%	

Source: AENA

CASE 12

Madrid, world capital of tourism and platform for the bilateral tourist alliance

Madrid is the world capital of tourism, not only because it organises FITUR, the main annual fair for the professionals of the sector, but also because it hosts the headquarters of the **World Tourism Organization (WTO)**, the specialised agency of the United Nations in charge of the promotion of a responsible, sustainable and accessible tourism. The WTO is formed by 159 countries, 6 associated members and more than 500 affiliate members that represent the private sector, educational institutions, tourist associations and local tourism authorities. This global ecosystem of tourism enables Madrid to become a platform of knowledge on markets, policies and instruments for a competitive and sustainable tourism, of training in the area of tourism, and of collaboration for tourism to become an effective tool of development and growth.

The 2020 edition of FITUR reached record turnout figures, with 11,040 companies from 165 countries, 150,011 professionals and 111,089 visitors of general public. In addition to being the largest showcase for global tourism, FITUR also

encompasses technology, future and sustainability. It addresses innovation in the field of tourism from Big Data, artificial intelligence, intelligent tourist destinations or start-ups. This annual fair also has the FITUR Next observatory, which acts as a guide to identify the trends of the tourism of the future and to project the guidelines that generate a positive impact for the visitors, with the aim to share a selection of initiatives with the tourist community that can be easily replicated to improve the quality of the tourist activity in terms of sustainability. **India participates in FITUR annually with a pavilion and high-level delegations**, including the presence of the Ministers of the sector –Shri K. Chiranjeevi in 2013 and Shri K. J. Alphons in 2018, year in which India was also the guest country.

At a tourism level, Spain and India have a series of non-competitive complementarities that can facilitate a bilateral alliance. On the one hand, Spain has knowledge and technical experience at the government level, which it can share with India in a bilateral alliance. With the annual presence of these Indian delegations to participate in FITUR, Madrid stands as the ideal environment to maintain the **political dialogue in the tourist sector** initiated in 2017. On the other hand, the geographic complementarities

of the Indian and Spanish tourist industries –with Spain focused on Europe and Latin America and India focused on Asia and North America– can enable **business partnerships at an operative and innovation level**. As the centre for tourism innovation and point of contact of the global industry, Madrid could become the ideal hub to explore these bilateral partnerships in tourism, also in the context of digital economy, like tourist apps for smartphones.

One of the major challenges that Madrid faces with India is to increase its **connectivity and positioning as tourist destination**. The launching in December 2016 of the direct flight operated by Air India constituted a step forward that would be important to consolidate with its reestablishment after the COVID-19 pandemic and to extend with new air routes. The celebration of the annual awards ceremony of the International Indian Academy Film (IIFA) in Madrid in 2016 served to enhance the knowledge about Madrid in India. However, there is still enormous potential to position the brand of Madrid in areas in which it is a world leader, albeit unknown for India, including innovation, digital economy, urban development, culture, gastronomy, fashion or sports.

6.5.

The relevance of the food processing and packaging industry in exchanges and bilateral innovation

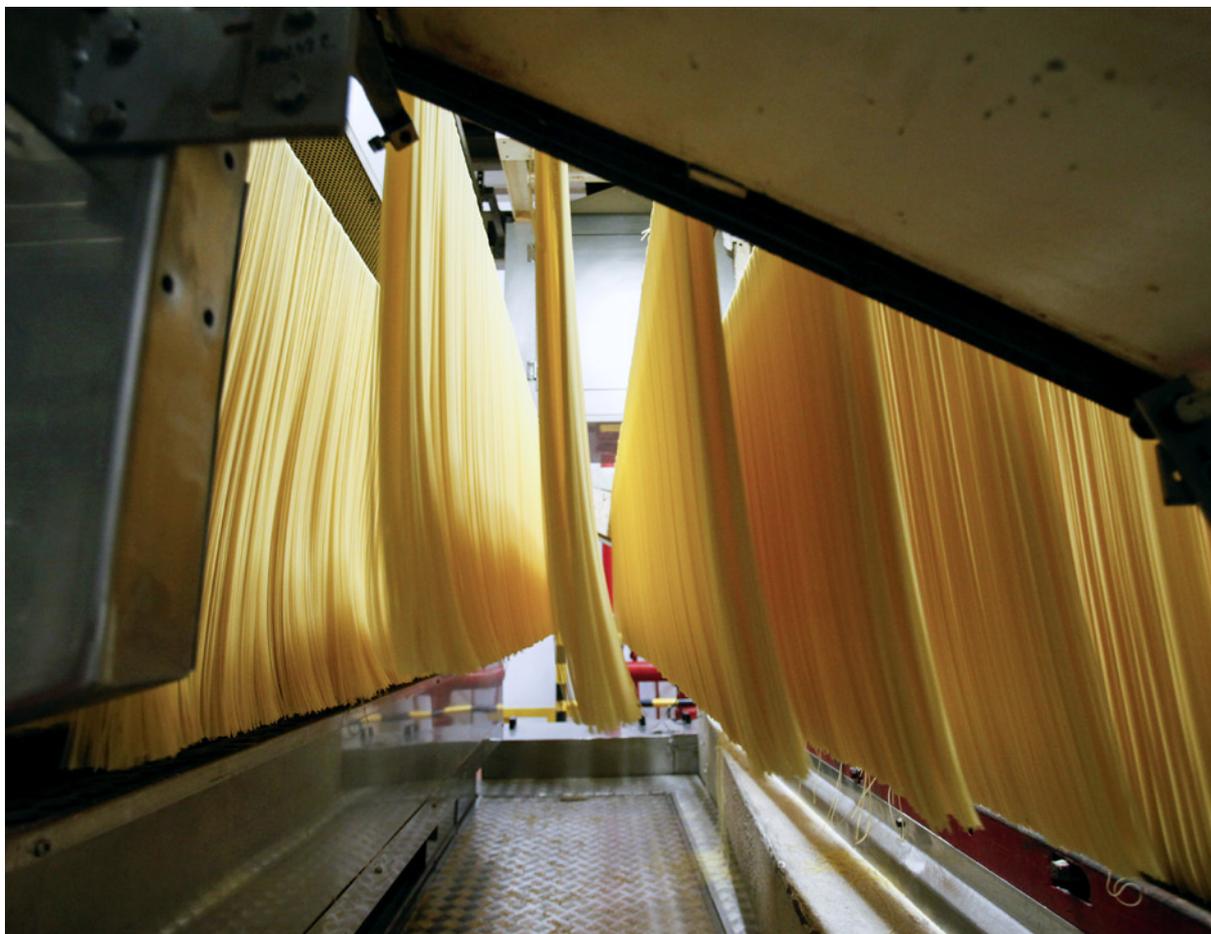
Within the agri-food sector, food processing is taking on a strategic dimension in our relations due to the bilateral complementarity. The food processing and packaging sector in India, in which Spain has become a world leader in technology and innovation with an 18% growth of innovation expenditure in 2019 (FIAB, 2019), is experiencing a fast growth with a significant transformation and development at the level of its local industries. Previous Indian Minister of Food Processing Industries, Harsimrat Kaur Badal, visited Spain in 2018 and held technical meetings in Navarra, with the Agro-Food City of Tudela, or the National Centre for Food Safety and Technology. This interest for the processes, technology and Spanish innovation in the sector was renewed with the visit a year later of a new Indian delegation led by Reema Prakash, Joint Secretary of the Ministry of Food Processing Industries, to present the investment opportunities the country has to offer to the food and beverage companies.

Food processing in India has experienced an 8.4% growth between the financial years of 2014 and 2018, reaching 32% of the total food market of India, 11.6% of employment and 10.7% of its exports (National Investment Promotion and Facilitation Agency, 2020) (see Illustration 48). The liberalisation of the sector –which currently allows up to 100% of investment through the automatic route–, along with state investment plans, including the Mega Food Parks Scheme and the planning of 37 food parks, of which 19 are already operational, has enabled foreign investments to grow by 44% during the 2019-20 financial year, amounting to USD 904 million (Ministry of Food Processing Industries, 2019).

The potential of the local market is attracting the investment of Spanish companies in the sector of food processing, developing the complete cycle of its agricultural process in India, from the cultivation to its sale in the local markets, including the processing of its products. The company from La Rioja **Rafael González** entered India in 2013 with its line of vegetal preserves. Its only productive centre outside Spain was located in Bangalore, with more than 450 workers. The company from Madrid **Ebro Foods** is present in India also since 2013, and it has become the first foreign branch with a factory of pasta in India. In 2019, it acquired the rice premium brand Tilda from Celestial Hain, and in that same year, Ebro Foods was awarded in the category Best Workplaces in Manufacturing 2019, ranking among the 25 best manufacturing companies in India.

India is also a platform for the Spanish companies to access the Asian market from one of the main global hubs of agricultural production. The company **Congelados de Navarra** is building in India its first production plant outside Spain for the processing of potatoes, peas and cauliflowers of local farmers and their sale in the Indian and Asian markets. **Lasenor**, a company of emulsifiers, selected India to build its plant of non-GM soy lecithin, as the South-Asian country is the largest producer of non-GM soy in the world.

The current situation caused by the COVID-19 pandemic has sped up the needs for innovation in hygiene, packaging and preservation in the food chain. The technological and innovative collaboration in the productive chain has become an essential pillar of bilateral cooperation. Within the initiatives promoted by the CDTI and the Indian department of biotechnology, the investigation in agricultural technology –for the resilience of crops– and the food technology –for techniques and processes that use live organisms or their substances to produce or to modify food– have become high-priority sectors for the promotion



Food processing in India has experienced great growth in recent years. In the picture, a pasta factory.

of joint innovation. Numerous Spanish companies contribute their technology to the Indian value chain in important fields including agricultural innovation, cold chain or packaging and distribution (see In Detail 19).

This bilateral technological complementarity became apparent during the ANUTEC/PackEX fair, held in Mumbai in 2018, the main platform for the processing industry and packaging of foods and drinks of India. For the first time, this fair included a Space for Spain organised by ICEX, in collaboration with Spain's Economic and Trade Office in Mumbai.

6.6.

Spanish and Indian foods as assets of bilateral mutual knowledge

In 2018, the Spanish industry exported foods and drinks to India amounting to euros 66.9 million, 8.1% more than the previous year. However, in 2019 the Spanish industry exported foods and drinks for euros 51.81 million, 22.5% less than the previous year. In the last ten years, the scope for international activity of the sector in India has evolved positively, improving its exports by up to 12.7%. Of its different products, the most

IN DETAIL 19

162

Spanish technology in the value chain of Indian food

Spanish technology has proven essential to improve the value chain of Indian food. In the field of agricultural innovation, the Spanish company **Blendhub** offers its two productive hubs in India –both in Chennai– to other food companies so they can develop and distribute their own products in India and the Asia Pacific region. With productive hubs in Spain, Colombia, Mexico and India, it has become the first multi-located food production network in the world. The branch of **AlgaEnergy** in India received the 2019 Award for Technological Leadership of "Agriculture Today India", awarded by the Minister of Agriculture of India, thanks to its cutting-edge technology and innovation that enhances the productivity, profitability and quality of Indian agriculture.

The isothermal technological solutions of the Spanish company **Zirkel Infracra**, present in India since 2013, have proven essential in the improvement of the capacities of local companies in the cold chain. **HRS India**, the branch of the Spanish company of technological solutions of power efficiency for the Indian agricultural sector, HRS, provided Nagarjuna Fertilisers –one of the most recognised



agricultural brands of India– with a tailored solution of thermal transfer for a production system of fertilizers. As a last example, the company from Murcia **Aurum Process Technology** associated with the Indian company Jonam Engineering Technologies to offer technology for thermal processing to the food industry, among other implementations.

Regarding the industry of packaging and food transportation, the Spanish company **Mespack** (of the group Ulma Packaging) is one of the main manufacturers of packaging and packing machinery in India, and the foreign company with wider implantation of machinery

of vertical and horizontal packaging in the country. The Catalan company **Bossar Packaging** entered the local market hand-in-hand with the Indian company Wraptech Machines, giving rise to Bossar India, with a productive plant in Mumbai where it produces its machinery specialised in vertical filling and sealing, multi-lane packaging and horizontal packaging. The Catalan company of Italian capital **Volpak** also produces in India. Finally, the company from Valladolid **Ather Eurobelt**, whose only international plant is in Bangalore, manufactures and assembles plastic bands for food and industrial transport in India.

ILLUSTRATION 48 / The food industry sector in India and Spain

Food and Beverage Industry in 2019

	Spain	India
Production, in USD billion	140 ¹	258 ²
Contribution to the industrial sector, %	15%	8,8%
Employment, in thousands	437	1.850
Exports, in USD billion	37.9 ³	34.7 ⁴

¹ Official figure: euros 119 billion
² Figure of 2015. For 2025, it is expected that Indian production might reach USD 535 billion
³ Official figure: euros 32.4 billion
⁴ Official figure: 10.7% of total Indian exports (USD 324.16 billion)

Source: FIAB; Invest India; IBEF; Strategic Investment Research Unit (SIRU); USDA Foreign Agricultural Service

Growth of market value of the packaging industry in India between 2010 and 2020, in USD billion

2010	2015	2020
15.1	31.7	72.6

Source: ASSOCHAM, Ernst & Young

exported one is olive oil, followed by pet food, olives, juice and raw oils (FIAB, 2020).

Despite the potential of the Indian market for fresh products of vegetal origin from Spain, including red berries or stone fruit, whose local production does not cover the total local demand, the phytosanitary barriers established in the Plant Quarantine scheme of 2003 limit their export. The negotiation of bilateral protocols with the Indian authorities for products not included in this plan, such as red berries, is essential for increasing the volume of fruit and vegetable exports, which in 2017 amounted 2.335 tons and euros 2.5 million, with a growth of 301% in volume and 358% in value compared to 2014 (FEPEX, 2019), thanks to the export of apples, plums, pears and persimmons, despite representing only 0.01% of the total Spanish exports of fruits and vegetables.

This increase in the consumption of food, that

is specific to the gastronomical cultures of each country, exerts an effect of attraction in the increased interest in the gastronomy and associated cultures. In recent years, numerous delegations of both countries have attended food fairs and congresses. In 2019, Indian importers visited the Salón Gourmet of Madrid, the Wine Fair FENAVIN in Ciudad Real or FRUIT ATTRACTION of Madrid, in which India was also the guest country. Within the framework of the Food fair, in each edition FIAB organised the Food & Drink Business Meetings, to promote knowledge and collaboration among companies of both countries.

Spanish and Indian foods have turned out to be an essential tool to improve mutual learning between both countries. Indian foods have little by little earned a spot in the shelves of Spanish supermarkets, mainly rice, vegetables and spices. Spanish food products in India are becoming increasingly recognised and appreciated by the Indian consumers, like its olive oil (see In Detail 20). Important Spanish brands confirm the capacity of Spanish food products to adapt to the local markets, like the case of Mahou, which produces beer in India since 2015, and has launched Mahou Maestra Wheat, a wheat beer created especially for India with the aim to satisfy the tastes of the local consumers.



Mahou India plant located in Rajasthan. © Mahou

6.7.

Gastronomical exchanges between Spain and India

It's been almost 40 years since the inauguration of the still-active restaurants Ganges, in Madrid and Namasté, in Barcelona. Ever since then, Indian cuisine has little by little taken its place in the Spanish culinary scene. Ranging from the traditional cuisine of Shibani Saigal in her restaurant Swagat to the haute cuisine of Benarés, which received the advice of the renowned Atul Kocchar in Madrid, or the more contemporary offers like the Surya Barcelona restaurants, there are dozens of Indian restaurants present

throughout Spain. However, a large proportion of the Indian restaurants in Spain are more frequented by tourists and Indian nationals than by Spanish nationals, despite the efforts to adapt the dishes to the local taste.

A good example of both gastronomic universes meeting is well represented by Ivan Surinder, born in Barcelona, who refurbished the Tandoor restaurant founded by his parents in a new connection with the Catalan Mediterranean cuisine. Jordi Arós and Kuldeep Singh, two friends who met in Palo Alto, opened the first curry bar of Barcelona and named it Masala73. Manjula Balakrishnan in Madrid, author of several recipe books on India, and Anjalina Chugani in

ILLUSTRATION 49 / Bilateral trade in food and drinks			
Exports from Spain to India in 2019		Exports from India to Spain in 2019	
Exports of food and drinks, in million euros		Exports of food and drinks, in million euros	
61.5		291.1	
Most exported food, in million euros	Olive oil: 17.3	Most exported food, in million euros	Molluscs: 118.7
% of the total exported food	28.1%	% of the total exported food	40.8%
Exports of fresh fruits, legumes and vegetables, in million euros		Exports of fresh fruits, legumes and vegetables, in million euros	
5.3		44.6	
% of the total exported food	8.6%	% of the total exported food	15.3%
Most exported fresh fruit, legume or vegetable, in million euros	Apples: 1.7	Most exported fresh fruit, legume or vegetable, in million euros	Cashews: 28.4
% of total exported fresh fruits, legumes and vegetables	32.1%	% of total exported fresh fruits, legumes and vegetables	63.7%
Exports of preserved fruits and vegetables, in million euros		Exports of preserved fruits and vegetables, in million euros	
7.9		15.7	
% of the total exported food	12.8%	% of the total exported food	5.4%
Most exported preserved fruit or vegetable, in million euros	Olives: 4.2	Most exported preserved fruit or vegetable, in million euros	Cucumbers and gherkins: 5.7
% of total exported preserved fruits and vegetables	53.2%	% of total exported preserved fruits and vegetables	36.3%
<i>Source: Secretariat of State for Commerce of Spain</i>		<i>Source: Secretariat of State for Commerce of Spain</i>	

ILLUSTRATION 50 / Compared perspective of the Spanish olive oil			
Main producer countries of olive oil in 2019		Main Asian destinations of exports of Spanish olive oil during the 2018/2019 campaign	
	Country	Production, in thousands of tons	
1	Spain	1,790	
2	Morocco	200	
3	Turkey	193.5	
4	Greece	185	
5	Italy	174	
<i>Source: International Olive Council</i>		Country	
		Exports, in million euros	
		1	Japan
		2	China
		3	South Korea
		4	Israel
		5	India
			143.5
			115
			35.5
			21.5
			15
		<i>Source: Ministry of Agriculture, Fisheries & Food</i>	

IN DETAIL 20

Spanish olive oil, leader in India

Although the olive oil market in India is not yet a mature market, representing 0.15% of the total vegetable oils and fats consumed in India in 2019, India imported more than USD 33.6 million of olive oil in 2019, of which 70% came from Spain—78% of the total of olive oil and 41% of olive pomace oil—and 27% came from Italy—18% of the total of olive oil and 55% of olive pomace oil. The tariffs escalation of 2018, from 12.5% to 30% in virgin olive oil and from 20% to 35% in olive oil and olive pomace oil, has significantly affected the imports. As opposed to the

32% growth during the 2013-2018 period, between 2018 and 2019 imports dropped by 49%, especially among virgin olive oil, due to its high cost in a price-sensitive market like India (COMTRADE, 2020).

Olive oil is a very demanded product by the urban middle-classes, aware of its benefits for health and as complement of the increasingly present Mediterranean cuisine in the large cities. The main Spanish companies have made an effort **to adapt the olive oil to the Indian market** and the culinary tastes of the local cuisine. **Borges**, present in India since 2010, has been adapting the sizes and packaging of its products to the local

market. It was the first company to market its Extra Light Olive Oil, which respects the flavours of the Indian cuisine while cooking.

Deoleo, present in India since 2013, has a new office in Mumbai since 2018 to centralise all the aspects of the manufacturing, distribution and marketing of its two main brands in the Indian market, Bertolli and Figaro, which is the most sold brand of olive oil in India. In view of the growth of the Indian cosmetic and beauty industry, Deoleo has identified diverse cosmetic uses of olive oil—as hair revitaliser, cleanser, moisturiser and exfoliant—which in the future could develop into products specifically oriented towards covering those needs.



Olive oil is one of the most appreciated Spanish products in India.

Barcelona, with her book *Soul Spices*, a recipe book of Indian dishes with a nutritional and medicinal approach, have played an essential role in the effort to expand the knowledge of Indian cuisine throughout the country.

Only a few Spanish chefs have been bold enough to try out India. The renowned chef Sergi Arola tried with the Arola Restaurant and Bar in the JW Marriott of Mumbai. Manuel Oliveira, who accompanied Sergi Arola in his move to conquer Mumbai, has finally succeeded with his restaurant La Loca María, which serves food with Spanish influence adapted to the Indian taste, as shown by his spicy "bravas" potatoes with very crunchy garlic and hot paprika. Nuria Rodriguez, who created the first restaurant of Spanish influence in Delhi, has also contributed with a design with Spanish touch to the Imperfecto Group as creative director, in addition to giving classes on Latin American cuisine. Chef Abhijit Saha is contributing to expand the knowledge on Spanish food in India. He visited Spain invited by the Government of Navarra in 2020, and in addition to including dishes of Spanish influence in his restaurants in Bangalore, his book *Caperberry* is inspired by the Spanish cuisine.

Spain and India are increasingly exploring exchanges and collaborations between chefs of both countries. In 2019, on the occasion of the visit of a delegation of 11 Indian chefs to the Madrid Fusion Congress, FIAB set up meetings between these chefs and some companies of the sector of the gourmet channel. The delegation was formed by chefs of the main cities of India, renowned owners of restaurants and catering companies. For the training programme on Spanish cuisine for chefs and sommeliers in 2019, FIAB invited two Indian chefs to the Spanish Gastronomy Training Program. In 2018, ICEX organised the visit to India of chefs Miguel Barrera and Nacho Solana, both with a Michelin star, to participate in the initiative *Spanish Extravaganza 2018*.

Innovation for a healthy and sustainable cuisine has taken on a new dimension with the COVID-19 pandemic. In addition to the pre-existing social, economic and climate challenges, we now have to add the challenges of health and hygiene. Barcelona has become the world capital for both a dialogue on gastronomical sustainability and a platform and showcase for technology in this sector. Barcelona is a global reference thanks to its innovation and gastronomical design, and this is also the case for India (see Case 13).

CASE 13

Barcelona, a reference for India in gastronomical innovation and design

The brand of Barcelona is widely recognised and valued in India, also in the gastronomical field. The gastronomical experience of Barcelona, whose roots can be found in the Mediterranean cuisine of Catalonia, is an important reference of the global culinary evolution and innovation. With tradition and gastronomical wealth at its basis, Barcelona has been including more and more cuisines and restaurants from all over the world to become a true **gastronomical paradise**. Currently Barcelona is the city that has accumulated the most Michelin stars in Spain with 32, including the internationally renowned Abac and Lasarte. The most prestigious international chefs, like Ferran Adrià or the Roca brothers, are closely tied to some of the best restaurants of the city.

But Barcelona's quality of gastronomical capital also reflects the city's commitment to the future of food and climate through **gastronomical innovation and food technology**. Foodture Barcelona was held in 2019, a space for open dialogue where visionary projects, startups,

science, design and innovation came together to explore and redesign the world of food. The fair Alimentaria, world reference of food, gastronomy and the hospitality sector, and Alimentaria FoodTech, the machinery, technology, and ingredients trade fair for the integrated food and beverages processing and preservation chain, bring together the main leaders of technology and innovation of Spain and India. Within the framework of the fair Alimentaria, the Spanish Federation of Food and Drink Industries (FIAB) organised Food & Drink Business Meetings in each of its editions, to connect businessmen of this sector from both countries.

This approach of innovation and sustainability is also present in the city's gastronomical offer, where numerous restaurants offer a choice based on **ecological and proximity products**, with the health of the people, the territories and the planet as top priority. The restaurant Xavier Pellicer of Barcelona was awarded the prize to the Best Vegetable Restaurant of the world in the 2018 contest *We're Smart Green Guide*. Barcelona's culinary experience, whose gastronomical variety has a high component of vegetarian food and global cuisine, including India's, makes it one of the preferred places of

the Indian tourist. 67% chose their destination moved by the gastronomical offer available (Taste of Travel, Booking.com, 2018).

In fact, **Barcelona will be the World Capital of Sustainable Food in 2021** and will host the 7th Milan Urban Food Policy Pact Global Forum between 19th-21st October 2021. Throughout the year, sustainable food will have a place at the heart of the political and media agenda, where policies and projects on sustainable food will be promoted. One of the more than 90 projects that will be implemented during this year will consist of elaborating a "Menu of the Capital", in which the hotel schools of the city will propose a series of ingredients to set up seasonal menus that can be adopted and customised by the restaurant business sector. They will also involve great chefs to materialise some of the proposals of this menu.

Barcelona is also a reference in architecture and design for India, and Antoni Gaudí's work is one of the most recognised and acclaimed. More and more Indian tourists go to Barcelona to be dazzled by its grid-based urbanism, modernist architecture and the design of its spaces. The 2019 Barcelona Design Week, hub of creativity, innovation and talent of design



Typical tapas bar in Barcelona's La Boqueria market.

with more than 67,000 visitors, hosted Indian designers and interior designers to engage in a dialogue on the role of art, design and architecture in the creation of experiences through the spaces. This creative and innovative design has become a fundamental pillar of the gastronomical offer, by building culinary experience also through space.

Barcelona is a reference city in the combination of design and cuisine. The restaurant OneOcean Bar won the 2016 "Restaurant & Bar Design Awards"; restaurant Alkimia was recognised as the best SBID design restaurant in

2017; and the restaurant Aürt ranked first in the category of Best Design of a Restaurant of Europe in 2019 of the International Hotel & Property Awards 2019. There are more and more Indian interior design studies that are inspired by a Spanish modern design for their projects, as is the case of Sumesh Menon and Associates in the Delhi restaurant La Roca, by Dinesh Arora.

As world gastronomical hub, Barcelona is a meeting and collaboration point between Spain and India. Barcelona has consolidated as a reference for India in innovation, design and gastronomical technology,

with a recognised and attractive brand. Gastronomical innovation, which has become a tool to solve the social, economic, ecological and climate challenges, has turned Barcelona into an ideal platform for bilateral dialogue in food sustainability and innovation with enormous collaboration opportunities, including food processing, ecological agriculture or food applications of the digital economy. This space for dialogue is the suitable framework for the creation, development and implementation of joint bilateral projects.



Spain's tourism promotion stand at a specialized fair.

Ideas and proposals for the revitalisation of relations in tourism, food and gastronomy.

The film *Zindagi Na Milegi Dobara*, which placed Spain in the map of Indian tourism and renewed the interest for the Spanish culture in the subcontinent, is without a doubt the most present landmark in the bilateral thinking, and Turespaña's most successful tourism campaign to date, not only in Southern Asia but, possibly, throughout the world. The annual growth in the number of tourists and the issuing of visas during the last decade show the strength of bilateral tourism in the pre-COVID 19 context. This is an encouragement to further strengthen this bilateral tourism once the pandemic is over. The increase and consolidation of the air connections, the streamlining of the processing of visas and the interconnection of the tourist weaves are some of the instruments available to maintain this positive trend of exchanges.

The COVID-19 pandemic has also brought about a larger demand for health and hygiene, which can be added to the more and more consolidated rise in awareness about sustainability and food processing and distribution. Spanish technology and innovation are becoming essential in the

modernisation of the Indian value chain in areas like agrarian innovation, cold chain or packaging and distribution. Spanish foods, linked to health and well-being, has also become more and more recognised and valued in India. The market of olive oil, in which Spain is an unquestionable leader, even if in many cases its brands are not identified with its country brand, is a great example of this success in the food exchange. However, the area of gastronomy, an essential instrument for the promotion of food, culture and design of both countries, has not been explored or developed enough despite its enormous potential.

The measures compiled in this process of joint reflection, which could continue promoting bilateral cooperation in tourism, food and gastronomy include:

1. The institutionalisation of our government relations in the field of tourism, by revitalising the 2009 MoU, including its update and a bilateral dialogue on tourism created in the 2017 APCI within its scope of action, would establish the suitable government framework to promote bilateral initiatives and measures, including the **consolidation and new creation of routes of air connectivity between both countries.**

2. The current health situation caused by COVID-19 has changed the paradigms of international tourism. For Spain and India to come out stronger from this pandemic and to again become attractive destinations, it is necessary to implement initiatives that promote innovation, sustainability and health security in both tourism industries. Madrid has become the ideal scenario for launching **a permanent space of public-private bilateral dialogue on tourism, on the sidelines of FITUR and the WTO meetings**, that revitalises the exchange of ideas and innovation in the tourist sector, with special emphasis on technological startups in the tourist niche.
3. Spain and India will have to be prepared to facilitate a robust reactivation of safe tourism once the pandemic is over. In the Spanish case, it would be advisable to **increase the consular infrastructure** in India, which has not grown despite the fact that the visas issued have multiplied in recent years; **to unify the processes for the applications of group visas** travelling with incentive programmes or to weddings (destination weddings), and **to facilitate a single-counter service** for the visa applications of the initiatives with a great bilateral impact, including cinema shootings or major fairs and conventions.
4. The Indian and Spanish tourism industries, scarcely interrelated to each other, are fundamentally non-competitive in the geographic areas in which they are specialised. This strategic complementarity, together with the synergies in innovation, encourages the promotion of **collaboration initiatives between the tourism business fabrics of both countries to strengthen the positioning and growth of their industries in their respective priority regions**.
5. In order to restore the image of Spain and India in the post-COVID-19 scenario, it would be advisable to **promote ambitious digital campaigns**. In the case of Spain, these initiatives could emphasise Spain's attractiveness as safe destination in terms of health, with an ideal climate for out-door activities and with a diversity in its offer of destinations that allows to enjoy the country without crowds. A permanent promotion action in social media, coordinated between Turespaña and the Ministry of Foreign Affairs and Cooperation of Spain, that could follow the model of the Swiss campaign #inLOVEwithSWITZERLAND, could be complemented with specific initiatives with tour operators and specialised magazines.
6. The interest shown by the official delegations and Indians companies in the Spanish innovation and technologies of the food-processing and distribution sector has been clear in recent years. The signing of **agreements of cooperation between the food industries**, incorporating two cross-cutting factors in innovation and business exchanges, would enable institutionalising this partnership, promoting the development of joint projects and encouraging matchmaking between public and private organisations of both countries.
7. The Indian Plant Quarantine, in force since 2003, regulating fresh products of plant origin authorised for their import to India, as well as the conditions of their import based on the origin country, provides that the access of these products to the market is negotiated bilaterally, product by product. It would be appropriate for the Ministry of Agriculture, Fisheries and Food (MAPA, in Spanish) and the Secretariat of State for Commerce of Spain to continue promoting the **negotiation of bilateral protocols with**

the Indian authorities within the framework of the Indian Plant Quarantine for the import of Spanish fresh products of plant origin, as they have been doing up until now.

8. The new demand for health and hygiene and the awareness about sustainability, accelerated by the current situation of the COVID-19 pandemic, offers an opportunity to rethink our bilateral alliance in the area of food to promote a healthy, innovative, ecological and sustainable food processing. Establishing a **permanent platform of public-private bilateral dialogue on food innovation and gastronomical sustainability in Barcelona, on the sidelines of the fair Alimentaria** and other leading international congresses, would allow to create a space for collaboration and ideas that promotes exchanges in innovation and mutual knowledge.
9. Both countries' food and cuisine, still widely unknown to each other, have lots of scope to promote mutual knowledge. Campaigns like the one developed in 2019 by Italy in India, "Can't Get More Italian", magnified by the digital platforms and actions outside the home by the main Italian food brands, could also be promoted by Spain and India, **highlighting the assets demanded by the Indian urban classes like sustainability, well-being, hygiene or design, linking the country brand to their main brands and food, and enhancing their digital impact in the social media and digital platforms.**
10. The activities developed to encourage the exchange of chefs, including training programmes, promotion activities or exchange initiatives, have proven to be very efficient in introducing foods and the cuisine of both countries in the Indian and Spanish cuisines. It would be appropriate to continue

encouraging the organisation of visit programmes for chefs, training courses and promotion activities to foster exchanges and culinary knowledge.

*The proposals and ideas contained in this working paper do not necessarily reflect the position of the Spain-India Council Foundation, nor that of its trustees, of the Indo-Spanish Chamber of Commerce or any of the organisations or persons who have contributed to this paper.

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