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PRODUCT CATALOGUE

exPort

Alentejo e Centro
2019



The exPorT Project

The export Project is a project developed by NERLEI - Associação Empresarial da Região de Leiria (main promotor) in co-promotion with NERE – Núcleo Empresarial da Região de Évora (co-promotor), whose main objective is to promote the agri-food and plastics converting industries through an internationalization process aiming for target markets such as Poland, Colombia, the United Kingdom and France. It is an intent of this project to strengthen the Portuguese SMEs capacity for internationalization as a way of increasing exports and the outlook of Portugal in the aforementioned sectors.

Within the project's framework, the two Business Associations established a programme of promotional activities and business opportunities for the products of both sectors, namely:

- Market analysis and strategic planning to get to know the selected target markets, their main economic trends and the chief business prospects for the agri-food and plastics converting industries;
- A virtual platform designed for promoting products and establishing a partnership network between Portuguese and foreign enterprises, available at www.projectexport.pt;
- Commercial prospecting missions to understand in loco and in detail the importers' needs in each target country and provide support to the Portuguese SMEs in their internationalization efforts;
- Trade missions to create links among potential clients and products/services, entrepreneurs or local representatives, maximising the establishment of business opportunities.

The exPorT project is an enterprise co-funded by the European Union through FEDER and the COMPETE 2020 Programme.



ANTÓNIO POÇAS

NERLEI President

Founded on 25 June 1985, NERLEI - Associação Empresarial da Região de Leiria has as its key mission providing a range of services that contribute to enhance the results of its associates, thereby boosting the entrepreneurial activities and the socioeconomical development of the region of Leiria.

Within a geographic area where the ceramics, glassmaking, moulds, plastics converting and ornamental stones industries are predominant, NERLEI soon began supporting the internationalization efforts on the region's enterprises, namely by enhancing the usage of EU funding in the area, having been regularly presenting applications for community projects and joint ventures such as the exPorT Project.

Having "Add to Develop" as a motto, the partnership with NERE to create the exPorT is a natural one, as it allows for an increase in trade partnerships with other regions and business associations.

The exPorT Project will be of paramount importance to increase and consolidate the commercial relationship of Leiria's businesses and industries with the markets of Colombia, France, the UK and Poland in the agri-food sector but specially in the plastics converting sector, that accounts for a very significant part of the industrial output of the region, being its core products the primary food packaging and the transit packaging for food products.



RUI ESPADA

NERE President

One of the key challenges' companies face nowadays, particularly SMEs, is how to increase their competitiveness in the global market. NERE has been implementing a set of EU co-funded projects to promote the access of regional enterprises to foreign markets, with a main focus on the agri-food sector which, given the distinctive nature of its products, has been growing internationally, especially in niche markets.

Aware of its role as a facilitator of access by Central Alentejo SMEs to international markets, NERE has a portfolio of projects, implemented in partnership with other business associations, focused is incrementing the knowledge of the main demands of European markets such as Spain, France, the UK, Germany and Poland, as well as other foreign markets like Canada, the US, Brazil, Colombia and Mexico, to name but a few.

The knowledge of international markets, but also several trade business missions, have allowed an increase in exports of Central Alentejo's economic agents, along with the establishment of an extensive contact network that will allow the launch of future international commercial partnerships.

The agri-food products are one of Central Alentejo's great potentialities, with particular focus on wine, olive oil, cheese, smoked and cured meat products ("enchidos") and some niche products, such as spirits (mainly gin), prickly pears, biscuits and acorn chocolates. With the exPorT Project, implemented in partnership with NERLEI, NERE expects to create new business alliances in markets still unexplored by Portuguese companies and to tighten relationships with well-known markets, such as France or the UK.



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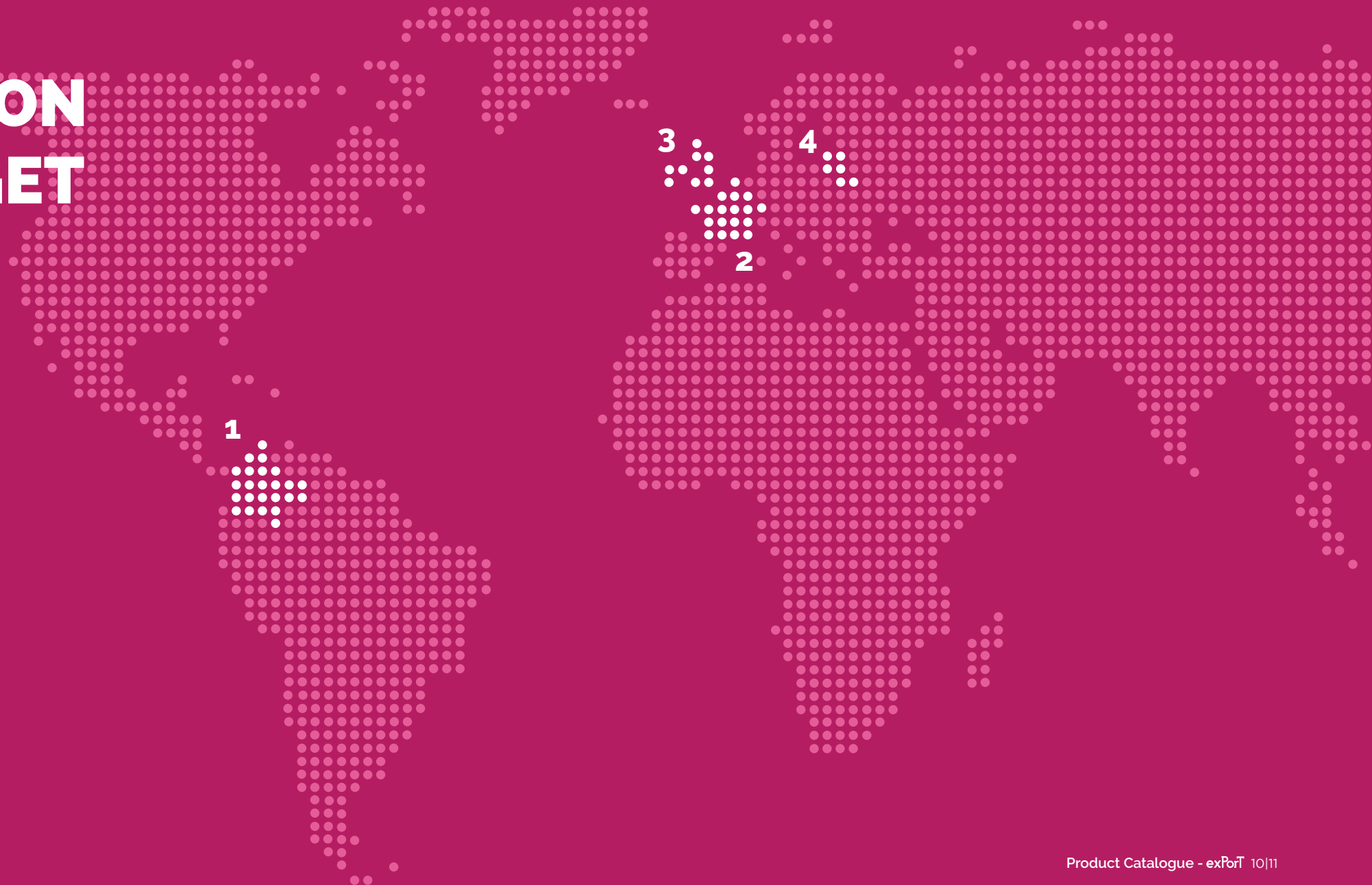
PRESENTATION OF KEY TARGET MARKETS

1. Colombia

2. France

3. Poland

4. UK



Colombia

- The agri-food exports have had a significant increase, making up 9,2% of the total goods exported to Colombia, worth a total of 4.130 million Euros.
- The main areas of opportunity for Portuguese companies are fish (canned and frozen), olive oil, cheeses, smoked and cured meats and wine.
- The current Colombian minimum monthly salary is 781.242,00 pesos (approx. 221€), which means that 8 out of 10 Colombians buy in retail chain, searching for cheaper items.
- However, influenced by current trends in the food market and by social changes in the country (namely the increase in purchasing power and the rising of the middle class), the gourmet market is a potentiality worth exploring.
- Price has been the key decision factor driving purchase, but the "quality factor" is on the rise, with an ever-growing part of the population opting for product of prime quality.
- The increasing notoriety of Portuguese food products and the growing demand by Colombian tourists who have visited Portugal, as well as an attraction for Portuguese Culture, represent crucial opportunities for Portuguese agri-food producers.
- The packaging industry is Colombia's main plastics converting industry.
- In the packaging sector, 62% of plastics are used in the food segment, followed by drinks (22%), and cosmetics and personal hygiene products (9%).

France

- In 2017, France was the 2nd biggest importer of Portuguese food products in terms of net worth, and the 1st one regarding wine and fish preserves.
- French consumers like to try new and innovative products, and the presence of a big Portuguese emigrant community in France constitutes a factor of receptiveness towards Portuguese products.
- The average annual income per French household in 2014 was 36.030 Euros.
- French households spent an average of 6.050 Euros in 2014 (15% of household spending), with meat, fish and cold cuts representing a larger share at 1.404 Euros.
- Export to the French market via the price factor is a challenge as the French market is characterized by low prices.
- In France, the food distribution market for Portuguese products is driven by large wholesale companies, managed by Portuguese or Portuguese descendants, which are mostly equipped with adequate logistics for the transportation, storage, distribution and sale of these products.
- In 2008 France was considered the 7th biggest plastic producer, with a 4.7% market share.

Poland

- The purchasing power is 6.437 euros per person (28th place in the European ranking).
- Meat products represent 28% of the total sales of the agri-food sector.
- 46% of orders placed in neighbourhood stores; 46% in supermarkets and hypermarkets; 41% in discount stores, 11% in used stores and 3% on the internet.
- The main factors influencing consumer buying are product quality (81%) and product price (61%).
- The plastic packaging market in Poland represents approximately 37.7% of the estimated market in 2020, a market share of 39.8%.

United Kingdom

- The English food market is highly developed and competitive, where there is a growing purchase of food online.
- The United Kingdom is an important market for wine exports of Portuguese agri-food products such as olive oil, fruit and vegetables and wine.
- For the English consumer, product quality, price, speed and comfort in purchasing and variety of choice are among the most influential factors at the time of purchase.
- A growing trend in the UK market is the demand for more natural organic products (4 out of 10 people have increased their consumption of healthy food and 17.4% of the UK population prefers natural products).
- In the United Kingdom, the retail and distribution sector is one of the most economically active sectors of activity, with retail chains and chains currently being highly concentrated.
- The English market is import-friendly and therefore highly competitive.
- With a turnover of around £ 19 billion, the UK is one of the top 5 plastics manufacturers in the European Union, with about 4.8 million tonnes of processed materials / year.



BRIEF DESCRIPTION OF EXPORT PROJECT SECTORS

Agri-food

The agri-food sector has been steadily becoming one of the pillars of the national economy, proving to be fundamental to the country's growth strategy. In Portugal, this is one of the most developed sectors in recent years, characterized by its innovative character and technological productive dynamics. Portugal has a set of appropriate soil and climate conditions for the production of quality products that are part of the Mediterranean diet, such as vegetables, fruits, meat / sausages, wines and olive oils. Another of the strengths of the agri-food sector in Portugal relates to the production of healthy foods based on sustainable agriculture principles.

Strengths	Challenges
Sector modernization effort	Atomized Sector
Innovative capacity of many national companies	High dependence on imports
Potential for exploring new markets	Administrative barriers that influence business dynamics
Differentiating and quality products	High supply chain pressure

In 2015, the agri-food sector in Portugal represented 20% of the manufacturing industry, in a universe of 10,500 companies, mostly small and medium sized. In terms of exports, these accounted for 5,914 million euros, placing Portugal in 41st place as the world's exporter of agri-food products, reaching a share of 0.46%.

Plastics for the food industry

The packaging industry is the biggest market in the plastics sector, consuming about 40% of the plastic produced at European level. The agri-food sector is the biggest consumer of plastic packaging, accounting for 65% of its applications (35% in non-liquid products and 30% in liquid products). Plastics pack over 50% of all food products, but only 15.2% of the total weight of packaging on the market. The plastic packaging market grew by 3.2% in 2016, with sales of that year standing at 650 million Euros. The production value has shown a positive evolution since 2014 and exports reached approximately 200 million Euros in 2016. The plastics industry for the agri-food sector is very competitive and integrates high quality products and solutions, and is the world leader in the segment "contract packaging ". Over the last few years plastic has become a preferred place in packaging as a result of its many advantages such as protection from contamination risks, extended shelf life, combating waste and contributing to safety to feed.

OLIVE OIL

TYPES OF PRODUCTS

Portugal is currently the world's seventh largest producer of olive oil and the fourth largest exporter of olive oil. In 2016, international sales of olive oil totalled 434 million euros and Brazil, Angola, Spain and Italy were the main destination markets, with olive oil being the most exported Portuguese product to Brazil. In the Alentejo Region over 70% of the national olive oil is produced. In the last 15 years, this territory has gained 50,000 new hectares of olive groves. Two categories of olive oil stand out:

Extra Virgin Olive Oil - superior olive oil, obtained directly from healthy olives, solely by mechanical processes.

Virgin Olive Oil - olive oil obtained directly from olives by mechanical processes only. It is a natural and healthy product, and this category is attributed to quality oils, free from serious sensory defects.

Organic Olive Oil



Organic olive oil is obtained from carefully selected olives for its perfect state of health and maturation, resulting in a medium fruity olive oil, suitable for tasting, seasoning and finishing dishes, but can be used in all types of cuisine.



SPIRITS DRINKS

TYPES OF PRODUCTS

Spirits have an alcohol content and are obtained by distillation of natural fermented grains, fruits, nuts and other materials, to which may be added flavourings or sugars. The principles of distillation have been known for over two thousand years. Among the best-known spirits are gin, vodka, rum, brandy, anise and tequila, among others. The spirits industry represents around 700 million Euros in sales and employs approximately 5.940 direct and indirect workers in Portugal. Gin is one of the fastest growing spirits in recent times. In the Alentejo region you can find different varieties of gin, from those that combine local raw materials and artisanal preparation methods to the innovative gin, produced to the music and incorporating in its distillation, pheromones that make it unique.



CANNED FISH

TYPES OF PRODUCTS

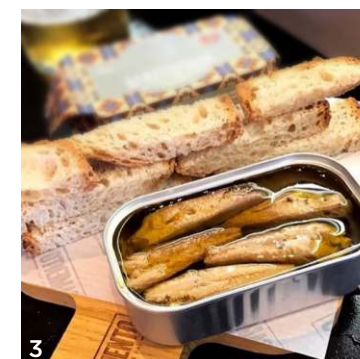
The abundance of multiple fish species, allied to their quality, as well as the length of the Portuguese coastline, created in Portugal the ideal conditions for the canning industry to flourish. This industry essentially processes sardines, tuna and mackerel, and sardines are the most used, accounting for about 50% of canned fish production in Portugal. About 60% of Portuguese preserves are intended for export, particularly to France, Italy, the United Kingdom, Spain, Benelux, Austria, Germany, Greece, Sweden, Denmark and Poland. Internationally, exports to the US, Canada, South Africa, Israel, Palestine, Japan, Brazil, China, Singapore, Australia, Angola and the Philippines stand out.



Organic Canned Fish



In addition to wild fish, the organic canning line uses biological ingredients such as olive oil, seaweed and verified herbs.



SWEETS



TYPES OF PRODUCTS

Traditional Portuguese sweets has its origins largely in national convents and monasteries in the 15th and 16th centuries. This confectionery has as its main ingredients sugar, eggs and almond, gaining notoriety from the moment when sugar arrived in Portugal in abundance. Convent sweets have passed through the convent walls and have been perpetuated for generations, leading to their national and international recognition. The list of convent sweets is extensive and covers all regions of Portugal. In the Alentejo Region, sweets and cakes stand out, such as "filós", "nógado", "pão de rala", "queijadas de requeijão", "sericaia de Elvas", "toucinho do céu" and "boleima".



SAUSAGES

TYPES OF PRODUCTS

Traditional Portuguese sausages have unique characteristics, and their quality is influenced by factors such as animals, soil quality, vegetation, technology and climate. In this context, names have been adopted by the European Union to protect the names of products whose relationship with the geographical environment in which they are produced, ensuring their authenticity. These are more specifically the names:

- Protected Designation of Origin (PDO)
- Protected Geographical Indication (PGI)
- Traditional Specialty Guaranteed (TSG).

There are different types of sausages in Portugal, including "chouriço", whose most common varieties come from pork meat and fat, seasoned with peppers, wine and garlic, "farinheira", produced with pork fat and flour or "morcela", which consists of bloody meats and pork fat.

Highlight:

In the Alentejo Region there are many protected name sausage products that guarantee the authenticity of the product and its connection with the geographical environment in which they operate. Of particular note here is the meat of the Alentejo black pig and the spices that are added to the locally produced sausages and give it a distinctive flavour.



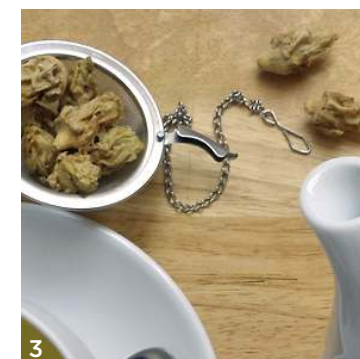
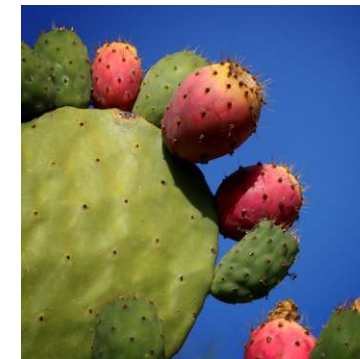
PRICKLY PEARS



TYPES OF PRODUCTS

The Prickly Pear is the fruit of the Prickly Pear tree, a drought-resistant, water-efficient evergreen shrub that is found from north to south of Portugal, particularly in Alentejo and Algarve. The Prickly Pear tree can be used almost entirely, namely palm, fruit, seed and flower:

- Palm: can be used for human consumption (fresh and cooked) and can be fed to livestock or used for livestock production, juices, jams or preserves;
- Fruit: The Indian fig has a sweet, juicy and aromatic pulp and contains small edible seeds, rich in antioxidants and with regenerative properties. It can be consumed as fresh fruit or in juice, nectar or pulp, or for the production of jams, jellies, syrups, vinegars or liqueurs, among others;
- Seed: Contains an oil that is used in the cosmetic and pharmaceutical industry;
- Flower: after drying, flower is intended for the production of infusions for therapeutic purposes.



HONEY

TYPES OF PRODUCTS

Honey is a sugary food, found in liquid form, produced by bees from nectar collected from flowers and processed by their digestive enzymes, being stored in honeycombs in the hives to feed them. Nowadays, besides honey, we can find several products such as bee pollen, royal jelly and wax. Honey contains proteins and various minerals and vitamins essential to our health, as well as has medicinal properties, being a food of recognized antibacterial action.



Alentejo Honey PDO



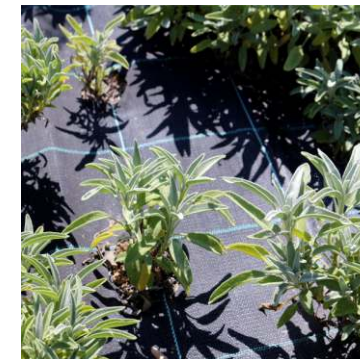
The Alentejo PDO - Protected Designation of Origin honey presents a light color, characteristic hue of the region and due to its pollen composition, being found in the mono floral (rose, sound, eucalyptus and orange) and multi floral varieties.

AROMATIC AND MEDICINAL PLANTS



TYPES OF PRODUCTS

The Iberian Peninsula is one of the biggest centers of aromatic and medicinal plant diversity (MAP) in the world, due to its continental, Mediterranean and Atlantic influence. MAPs, due to their organoleptic and medicinal properties, are increasingly sought at national and international level. Currently, the MAP export market is growing and the demand for plants produced in Portugal is highly valued, both for its sustainable production and for the potential for the extraction of essential oils. The aromatic and medicinal plants have different uses namely food, aromatherapy, perfumery and cosmetics, among others.



CHEESES

TYPES OF PRODUCTS

Cheese is a solid food produced from cow's, goat's and sheep's milk, among others. It is produced by the coagulation of milk, which turns it into "curd and whey". There are hundreds of types of cheese produced all over the world, and in Portugal PDO cheeses are well known, i.e. with Protected Designation of Origin, which identifies cheeses originating in a particular place or region, whose quality or characteristics are solely due to geographical environment in which they are produced and whose production stages take place within the defined geographical area.

Évora Cheese PDO



Évora PDO cheese is made from raw sheep milk of the regional Merina Branca breed. It is a ripened cheese, hard or semi-hard and yellow in color. It has a characteristic taste and aroma, slightly spicy and acidic, more accentuated in hard cheese. Évora PDO cheese can be presented in different formats, namely: - "Pequeno" hard paste with a diameter of 6 to 8 cm and a weight of 60 to 90 g; - "Merendeira", of hard paste, 12 to 14 cm and weighing 120 to 200 g; - "Merendeira", of semi-hard paste, with a diameter of 13 to 15 cm and weight of 200 to 300 g..



WINES



TYPES OF PRODUCTS

Wine is an alcoholic beverage produced through the fermentation of grape juice. In the European Union, wine is legally defined as the product obtained exclusively by the partial or total fermentation of fresh whole or crushed grapes or must. The quality and unique character of its wines make Portugal a reference among the main producing countries, with a prominent and growing place among the 12 main world producers.



Highlight:

Alentejo is a wine region of great tradition. In addition to the Alentejo Regional Wine, which is found throughout the Region, the DOC Alentejo wine region comprises eight major wine subregions: Borba, Évora, Granja-Amareleja, Moura, Redondo, Portalegre, Reguengos and Vidigueira. Distinctive soil characteristics, countless hours of sun exposure and a selection of selected varieties allow for high quality production.





PLASTICS FOR THE FOOD INDUSTRY

44 - Food Packaging

46 - Food Transport Packaging

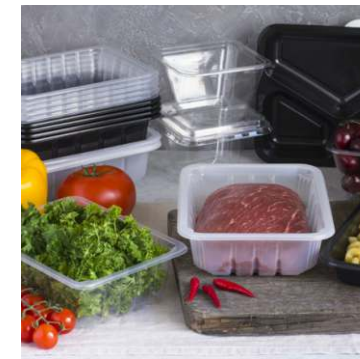
FOOD PACKAGING



TYPES OF PRODUCTS

Food packaging is one of the key elements to take into consideration in the acceptance of agri-food products by the final consumer. Thus, the companies responsible for the production of this type of packaging in Portugal, and particularly in the region of Leiria, make available to their customers a diverse range of packaging, produced using diverse technologies and raw materials, aiming at the creation of packages which, in addition to its basic functions (protect and transport), provide added value to agri-food products.

In short, these Portuguese companies are recognised in the production of innovative and differentiated packaging that includes dimensions such as their environmental footprint, materials used, their capacity for reuse and recycling, ergonomics and formats, among others.



FOOD TRANSPORT PACKAGING

TYPES OF PRODUCTS

Food transport packaging plays a major role in the process of internationalization of food products to international markets. As a result, Portuguese companies that produce this type of packaging are increasingly investing in smart and flexible shaped products, using innovative raw materials that guarantee the quality of food over long sea shipping routes, air or ground.

Thus, these companies provide their customers with a diverse set of tailor-made solutions, which emphasize, in addition to food safety during transport, the optimization of space and costs in the different means of transport used.



In short:

"In addition to the good quality of food products, it is crucial to know what types of packaging are recommended to deliver these products to their customers."