Spanish Franchise in the World

AEF
SPANISH
ASSOCIATION OF
FRANCHISERS

Statistical Report

2016

SPANISH FRANCHISE IN THE WORLD

Report 2016

International statistics for this 2016 brings fully positive conclusions, showing how the Spanish franchise system is increasing its activity in foreign markets.

We will first of all point out the three general lines of this survey that get very clear results, with continuous increases:

> **Spanish presence in 137 countries.**
> (132 in the previous report. A 3.78% increase).

> **302 franchise flagships are exported.**
> (296 in the previous report. A 2.03% increase).

> **Spain has 20,891 stores/sites in foreign markets.**
> (10,874 in the previous report. A 5.12% increase).

If we assume that of those 1,232 flagships operating in our country 218 have a foreign origin, we just have 1,014 national franchises, so **the 302 exporting brands represent 29.78% of the total** to be considered.

The degree of penetration of each brand naturally presents a great diversity. Having into account the number of sites identified in each country, we can segment the whole 302 flagships as follows:

- ❑ 69 brands (23% of the total) have a sole store abroad.
- ❑ 97 (32%) have between 2 and 5 sites abroad.
- ❑ 31 (10%) have between 6 and 10.
- ❑ 55 (18%) have between 11 and 50.
- ❑ 24 (8%) have between 51 and 100.

From this point on we enter in the group of 26 franchises (23 in previous year) very developed in export activities:

- ❑ 7 (2%) have between 101 and 200 premises in other countries.
- ❑ 9 (3%) have between 201 and 500.
- ❑ 7 (2%) have between 501 and 1,000.
- ❑ 2 (1%) have between 1,000 and 2,000.
- ❑ 2 (1%) have more than 2,000.

Flagships

The rapid growth in the number of flagships makes a 2.03% more on that existing in 2015.

New incorporations have occurred in the following sectors:

- ❑ Services to Business (2)
- ❑ Beauty and Aesthetics (1)
- ❑ Leisure Centres (1)
- ❑ Hospitality/Restaurants (1)
- ❑ Miscellaneous Services (1)
- ❑ Sports (1)
- ❑ Specialized Shops (1)
- ❑ Dry Cleaner's (1)

Only two sectors show a downward adjustment:

- ❑ Jewellery/Costume jewellery (1)
- ❑ Fashion (1)

In the following table we can see that Fashion remains at the top of the list, now with 75 flagships (24.8% of the total), a sector followed some way behind by that of Hospitality/Restaurants with 49 (16.2%) and Beauty and Aesthetic with 35 brands (11.6%).

These 3 sectors, with a total of 159 flagships, cover 52.6% of the total.

General distribution of brands by sectors is as follows:

Sectors	Number of Flagships
Travel Agencies	5
Estate Agencies	3
Food	11
Beauty-Aesthetics	35
Leisure Centres	7
Health Centres	5
Bedding	1
Sports	2
Dietetics/Paraphrarmacy	3
Renewable energies	3
Education-Training	9
Photography	3
Hospitality/ Restaurants	49
Computers	11
Jewellery/Costume jewellery	3
Furniture/Household Textiles	15
Fashion	75
Office/Stationary	3
Optics	1
Bakery / Patisserie	1
Services /Advisory	6
Services / Automotive industry	6
Services / Financial	2
Services / Transports	6
Services /Miscellaneous	7
Specialized Shops	22
Dry Cleaner's	8
TOTAL	302

STORES

Sectors	Number of Flagships	Number of Stores
Travel Agencies	5	203
Estate Agencies	3	72
Food	11	2,796
Beauty-Aesthetics	35	1,442
Leisure Centres	7	32
Health Centres	5	191
Bedding	1	8
Sports	2	5
Dietetics/Paraphrarmacy	3	1,808
Renewable energies	3	54
Education-Training	9	77
Photography	3	59
Hospitality/ Restaurants	49	1,374
Computers	11	834
Jewellery/Costume jewellery	3	219
Furniture/Household Textiles	15	605
Fashion	75	9,428
Office/Stationary	3	17
Optics	1	25
Bakery / Patisserie	1	6
Services /Advisory	6	58
Services / Automotive industry	6	13
Services / Financial	2	4
Services / Transports	6	350
Services /Miscellaneous	7	111
Specialized Shops	22	596
Dry Cleaner's	8	504
TOTAL	302	20,891

Total net growth of the number of stores/sites has been 1,107 units in last year. If it is expressed as a percentage, 2016 presents a 5.12% more than last year.

Those sectors having increased their participation in the international market are:

- ❏ Fashion (478)
- ❏ Dietetics and Parapharmacy (311)
- ❏ Food (257)
- ❏ Specialized Shops (119)
- ❏ Beauty and Aesthetics (86)
- ❏ Jewellery/Costume jewellery (44)
- ❏ Dry Cleaner's (36)
- ❏ Furniture / Household Textiles (35)
- ❏ Health Centres (27)
- ❏ Travel Agencies (15)
- ❏ Computers (6)
- ❏ Education (4)
- ❏ Optics (2)
- ❏ Bakery / Patisserie (2)

Sectors that have lost shops are:

- ❏ Services: Transports (242)
- ❏ Hospitality / Restaurants (107)
- ❏ Photography (29)
- ❏ Services: Advisory (17)
- ❏ Leisure Centres (5)
- ❏ Miscellaneous Services (5)

COUNTRIES

The number of countries where Spanish franchise is present continues to grow, and this year are 137, with a 5 net growth being equivalent to the 3.78% in last year.

The three first places correspond to: Fashion, which remains in the first position with a presence in 121 countries; Hospitality/Restaurants with premises in 75 different countries; and Furniture / Household Textiles being present in 72 countries.

Sectors	Number of Flagships	Number of Stores	Number of Countries
Travel Agencies	5	203	10
Estate Agencies	3	72	8
Food	11	2,796	11
Beauty-Aesthetics	35	1,442	49
Leisure Centres	7	32	17
Health Centres	5	191	8
Bedding	1	8	1
Sports	2	5	2
Dietetics/Parapharmacy	3	1,808	21
Renewable energies	3	54	10
Education-Training	9	77	30
Photography	3	59	26
Hospitality/ Restaurants	49	1,374	75
Computers	11	834	28
Jewellery/Costume jewellery	3	219	40
Furniture/Household Textiles	15	605	72
Fashion	75	9,428	121
Office/Stationary	3	17	4
Optics	1	25	1
Bakery / Patisserie	1	6	4
Services /Advisory	6	58	16
Services / Automotive industry	6	13	5
Services / Financial	2	4	2
Services / Transports	6	350	8
Services /Miscellaneous	7	111	27
Specialized Shops	22	596	44
Dry Cleaner's	8	504	37
TOTAL	302	20,891	

Countries	Flagships	Premises	Countries	Flagships	Premises	Countries	Flagships	Premises
Albania	7	8	Philippines	14	73	Monaco	4	4
Germany	32	446	Finland	3	19	Mongolia	1	2
Algeria	8	12	France	74	1.483	Montenegro	5	5
Andorra	86	110	Georgia	9	16	Mozambique	1	1
Angola	9	26	Ghana	3	6	Myanmar	1	1
Saudi Arabia	33	298	Gibraltar	9	9	Namibia	1	3
Argentina	22	951	Greece	25	261	Nicaragua	1	3
Armenia	9	15	Guatemala	28	150	Nigeria	2	4
Aruba	5	6	Guinea Conakry	1	1	Norway	9	40
Australia	7	37	Equatorial Guinea	1	1	New Zealand	2	3
Austria	16	89	Haiti	1	1	Oman	8	9
Azerbaijan	10	19	Holland	21	166	Pakistan	2	4
Bahamas	1	1	Honduras	14	27	Panama	39	66
Bahrain	12	18	Hungary	17	80	Paraguay	6	9
Belgium	31	244	India	5	81	Peru	30	152
Benin	1	1	Indonesia	10	74	Poland	25	793
Bermuda	1	1	Iraq	1	1	Portugal	186	2.770
Belarus	2	8	Iran	5	15	Puerto Rico	11	20
Bolivia	7	11	Ireland	14	47	Qatar	25	47
Bosnia	8	28	Iceland	1	2	United Kingdom	47	297
Brazil	21	1.462	Cayman Islands	1	1	Czech Republic	17	131
Bulgaria	18	90	Reunion Islands	1	1	Dominican Repub.	31	95
Cape Verde	3	4	Israel	12	131	Romania	34	245
Cambodia	4	6	Italia	59	2.217	Russia	32	812
Cameroon	1	1	Jamaica	1	1	San Marino	3	3
Canada	7	40	Japan	13	200	Senegal	2	2
Chile	31	281	Jordan	18	31	Serbia	11	41
China	31	1.115	Kazakhstan	11	51	Singapore	16	103
Cyprus	20	71	Kyrgyzstan	1	2	Saint Martin	2	2
Colombia	39	258	Kosovo	1	2	Syria	4	7
Congo Brazzaville	1	1	Kuwait	30	68	Sri Lanka	1	1
South Korea	15	107	Latvia	9	21	South Africa	5	61
Ivory Cast	3	4	Lebanon	21	69	Sudan	1	1
Costa Rica	25	47	Libya	4	7	Sweden	12	49
Croatia	14	79	Liechtenstein	1	1	Switzerland	23	128
Cuba	6	33	Lithuania	10	31	Surinam	1	3
Curacao	3	4	Luxembourg	14	17	Thailand	11	63
Denmark	5	13	Macedonia	8	9	Taiwan	12	51
Ecuador	26	108	Madagascar	1	1	Tanzania	1	1
USA	32	604	Malaysia	12	81	Tunisia	6	15
Egypt	18	73	Malta	14	24	Turkey	16	355
El Salvador	12	34	Morocco	41	103	Uruguay	11	13
U. A. Emirates	36	172	Mauritius	3	9	Ukraine	13	95
Slovakia	19	59	Mauritania	1	1	Venezuela	34	462
Slovenia	12	42	Mexico	89	1.259	Vietnam	2	17
Estonia	7	11	Moldavia	3	3	**Total of Countries and Territories: 137**		

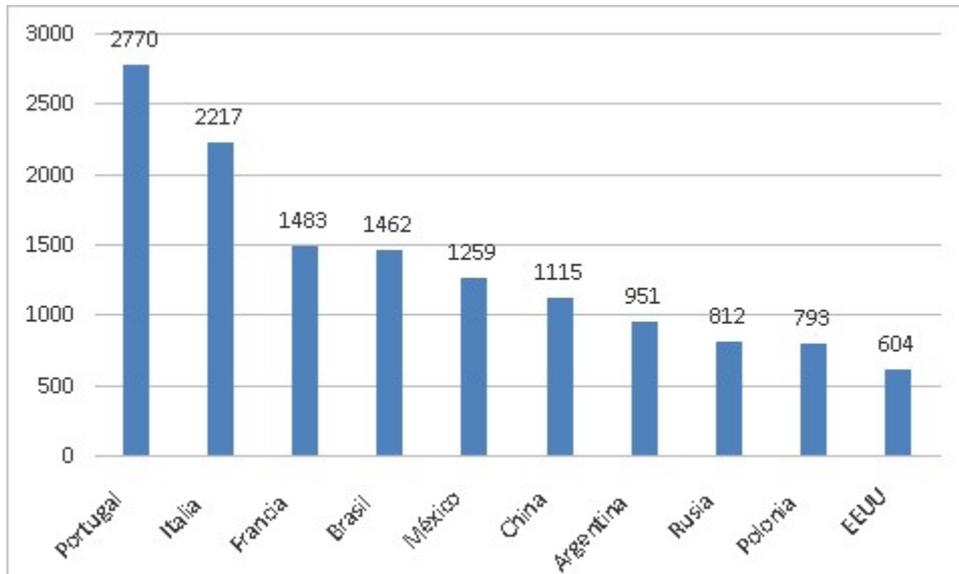# FIRST TEN COUNTRIES BY SPANISH FLAGSHIP PRESENCE
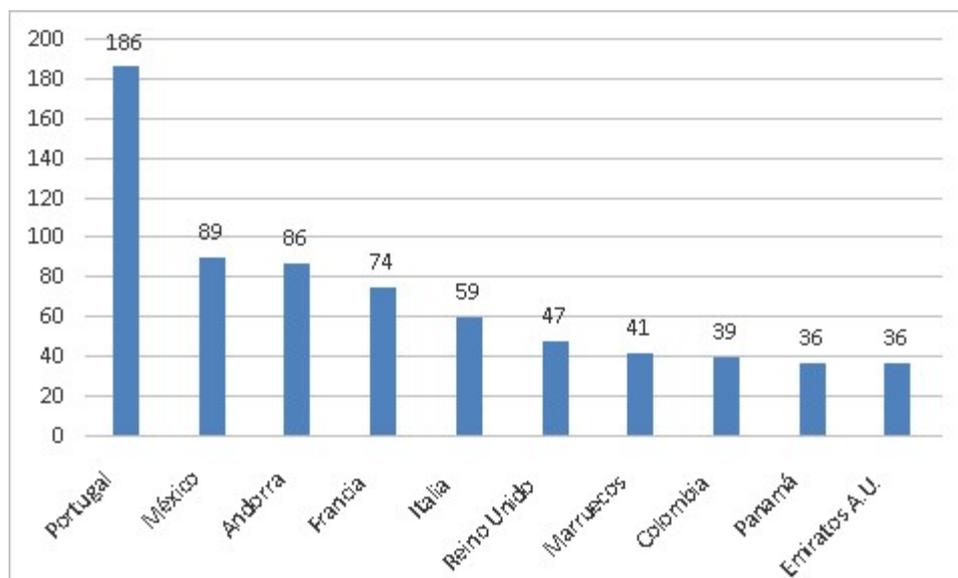
The same countries remain in the first place and in the same order in which they appear in the last year report. Portugal amounts 61.5% of the total of Spanish franchise exporters; Mexico occupies second place, although at a great distance, with 29.4% of brands already established there. Third one is Andorra, with 28.4%, in this case for evident reasons of proximity and implementation facilities.

In absolute figures, we will highlight that France has grown in 7 new brands in comparison with the previous year; Italy is registered with 6 and the United Kingdom with 5.

Noteworthy is the appearance for the first time of the United Arab Emirates in this statistic data of the first ten countries by Spanish flagship presence since they have 36 brands.

FIRST TEN COUNTRIES BY NUMBER OF STORES

It may be noted that the first ten countries build up 13,466 stores of a Spanish origin or, in other words, 64.4% of the total.

Portugal, as it is logical by the number of flagships operating there, remains clearly in the first place. The growth of Italy (10.6%) is to be highlighted. And, as regards European countries, the following ones are France (7%) and Poland and Russia (3.8%).

Latin America emerges strongly through Brazil (7%), Mexico (6%), and Argentina (5.5%).

China reaffirms its place (5%), far away from playing its due part by its socio-economical importance.

It is important to note the emergence of the United States in the 10th place, with 604 stores (2.9%).

Countries and territories grouped by continents and areas.

1. **EUROPE**

	Number of Flagships	Number of Premises
Albania	7	8
Germany	32	446
Andorra	86	110
Austria	16	89
Belgium	31	244
Belarus	2	8
Bosnia	8	28
Bulgaria	18	90
Cyprus	20	71
Croatia	14	79
Denmark	5	13
Slovakia	19	59
Slovenia	12	42
Estonia	7	11
Finland	3	19
France	74	1,483
Gibraltar	9	9
Greece	25	261
Holland	21	166
Hungary	17	80
Ireland	14	47
Iceland	1	2
Italy	59	2,217
Kosovo	1	2
Latvia	9	21
Liechtenstein	1	1
Lithuania	10	31
Luxembourg	14	17
Macedonia	8	9
Malta	14	24
Moldavia	3	3
Monaco	4	4
Montenegro	5	5
Norway	9	40
Poland	25	793
Portugal	186	2,770
United Kingdom	47	297
Czech Republic	17	131
Romania	34	245
Russia	32	812
San Marino	3	3
Serbia	11	41
Sweden	12	49
Switzerland	23	128
Turkey	16	355
Ukraine	13	95
Total: 46		**11,458**

Countries and territories grouped by continents and areas.

2. AMERICA

	Number of Flagships	Number of Premises
Argentina	22	951
Aruba	5	6
Bahamas	1	1
Bermuda	1	1
Bolivia	7	11
Brazil	21	1.462
Canada	7	40
Chile	31	281
Colombia	39	258
Costa Rica	25	47
Cuba	6	33
Curacao	3	4
Ecuador	26	108
USA	32	604
El Salvador	12	34
Guatemala	28	150
Haiti	1	1
Honduras	14	27
Cayman Islands	1	1
Jamaica	1	1
Mexico	89	1,259
Nicaragua	1	3
Panama	39	66
Paraguay	6	9
Peru	30	152
Puerto Rico	11	20
Dominican Republic	31	95
Saint Martin	2	2
Surinam	1	3
Uruguay	11	13
Venezuela	34	462

Total: 31   **6,105**

Countries and territories grouped by continents and areas.

3. ASIA

	Number of Flagships	Number of Premises
Armenia	9	15
Azerbaijan	10	19
Cambodia	4	6
China	31	1,115
South Korea	15	107
Philippines	14	73
Georgia	9	16
India	5	81
Indonesia	10	74
Iraq	1	1
Iran	5	15
Japan	13	200
Kazakhstan	11	51
Kyrgyzstan	1	2
Malaysia	12	81
Mongolia	1	2
Myanmar	1	1
Pakistan	2	4
Singapore	16	103
Sri Lanka	1	1
Thailand	11	63
Taiwan	12	51
Vietnam	2	17
Total: 23		**2,098**

4. MIDDLE EAST

	Number of Flagships	Number of Premises
Saudi Arabia	33	298
Bahrain	12	18
U. A. Emirates	36	172
Israel	12	131
Jordan	18	31
Kuwait	30	68
Lebanon	20	69
Oman	8	9
Qatar	25	47
Syria	4	7
Total: 10		**850**

Countries and territories grouped by continents and areas.

5. AFRICA

	Number of Flagships	Number of Premises
Algeria	8	12
Angola	9	26
Benin	1	1
Cape Verde	3	4
Cameroon	1	1
Congo Brazza.	1	1
Ivory Coast	3	4
Egypt	18	73
Ghana	3	6
Guinea Conakry	1	1
Equat. Guinea	1	1
Reunion Islands	1	1
Libya	4	7
Madagascar	1	1
Morocco	41	103
Mauritius	3	9
Mauritania	1	1
Mozambique	1	1
Namibia	1	3
Nigeria	2	4
Senegal	2	2
South Africa	5	61
Sudan	1	1
Tanzania	1	1
Tunisia	6	15
Total: 25		**340**

6. OCEANIA

	Number of Flagships	Number of Premises
Australia	7	37
New Zealand	2	3
Total: 2		**40**

LOCATION OF THE EXPORTING FRANCHISE HEAD OFFICES
BY AUTONOMOUS COMMUNITIES

Autonomous Communities	Number of Flagships	%
Catalonia	103	34.11
Madrid	92	30.46
Andalusia	29	9.61
Community of Valencia	29	9.61
Galicia	19	6.29
Aragon	5	1.66
Balearic Islands	5	1.66
Murcia	4	1.32
Asturias	4	1.32
Canary Islands	3	0.99
Castile-La Mancha	3	0.99
Castile and Leon	3	0.99
Basque Country	2	0.66
La Rioja	1	0.33
	302	**100**

Exporting franchise head offices by Autonomous Communities

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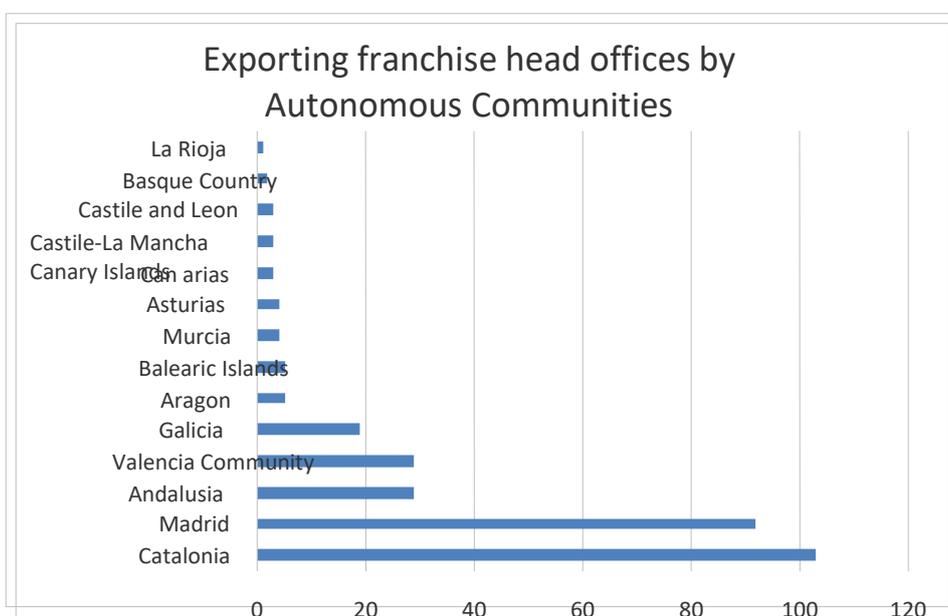
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