AEF STATISTICAL SERVICE 2018 REPORT

SPANISH FRANCHISES
WORLDWIDE

The conclusions of the international statistics for this year 2018 are clearly positive, as has been the case for several years, showing how the Spanish franchise system´splan to extend into foreign markets is succeeding.

We shall highlight, firstly, the key points of this study, which show the following results:

- **Spanish presence in 139 countries**
(2 countries more than in the 2017 report)

- **Export of 334 franchise brands**
(21 more brandsthan in the previous report (313), an increase of 6.7%).

- **Spain has 22,394 outlets in foreign markets.**
(664 outlets more than in the previous report (21,730), a 3% increase).

Based on the reality that out of 1,348 brands that operate in Spain,232 are of foreign origin, we have a total of 1,116 Spanish franchises, so **the 334 exporting brands represent 29.92% of the total to be considered.**
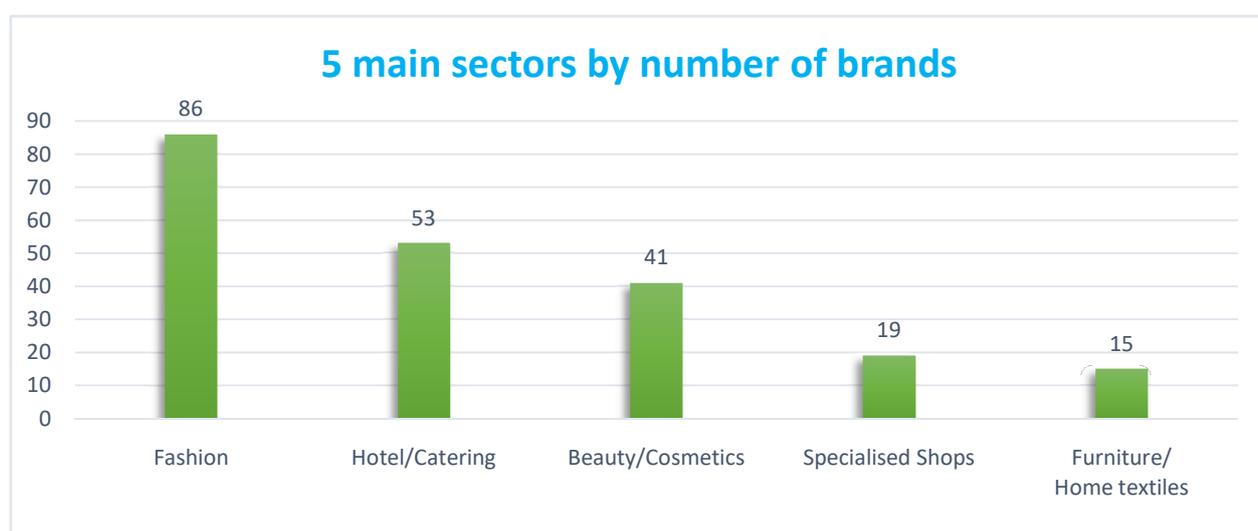
Evolution by sector

In the following chart we can see that the Fashion sector remains in first place, now with 86 brands (25.7% of the total),closely followed by the Hotel/Catering sectorwith 53 (15.8%) and Beauty/Cosmetics with 41 brands (12.2%).

These three sectors, with a total of 180 brands, account for 53.9% of the total.

The general distribution of international brands by sector is as follows:

Sectors	Number of Brands
Automotive Services	6
Bakeries/Confectionary	1
Beauty/Cosmetics	41
Cleaning Services	2
Computing	11
Consultancy Services	6
Dietetics/Parapharmacy	3
Dry-Cleaning	11
Estate Agents	4
Fashion	86
Financial Services	2
Food	14
Furniture/Home textiles	15
Health Centres	5
Hotel/Catering	53
Jewellery/Costume	3
Leisure Centres	7
Office/Stationary	3
Optics/Audiometry	3
Photography	2
Renewable energies	5
Specialised shops	19
Sports	2
Teaching/Training	10
Transport Services	6
Travel Agencies	5
Various Services	9
TOTALS	334

5 main sectors by number of brands

Total number of outlets- evolution

Sectors	Number of Outlets
Automotive Services	13
Bakeries/Confectionary	16
Beauty/Cosmetics	1,603
Cleaning Services	11
Computing	867
Consultancy Services	58
Dietetics/Parapharmacy	1,727
Dry-Cleaning	659
Estate Agents	111
Fashion	10,111
Financial Services	4
Food	2,745
Furniture/Home textiles	619
Health Centres	123
Hotel/Catering	1,577
Jewellery/Costume	359
Leisure Centres	32
Office/Stationary	19
Optics/Audiometry	121
Photography	26
Renewable energies	161
Specialised shops	514
Sports	5
Teaching/Training	85
Transport Services	511
Travel Agencies	195
Various Services	122
TOTALS	**22,394**

The net total increase in the number of outlets has been, during the last year, 664 units. In percentage terms, 2018 entailed a 3% increase on the previous year.

Analysis by country & jurisdictions

The number of countries with a Spanish Franchise presence has doubled compared to the previous year, so in 2018 there are now 139 markets with a Spanish brand presence.

As for the sectors with the biggest presence by number of countries, the three first positions correspond to:

- Fashion, which remains in first place with a presence in 123 countries;
- Hotel/Catering with a presence in 77 different countries;
- Furniture/Home textiles with a presence in 71 countries.

Sectors	Number of Countries
Automotive Services	5
Bakeries/Confectionary	4
Beauty/Cosmetics	59
Cleaning Services	7
Computing	24
Consultancy Services	16
Dietetics/Parapharmacy	22
Dry-Cleaning	39
Estate Agents	12
Fashion	123
Financial Services	2
Food	13
Furniture/Home textiles	71
Health Centres	3
Hotel/Catering	77
Jewellery/Costume	44
Leisure Centres	17
Office/Stationary	4
Optics/Audiometry	8
Photography	12
Renewable energies	15
Specialised shops	40
Sports	2
Teaching/Training	32
Transport Services	8
Travel Agencies	9
Various Services	28

Analysis by country & jurisdictions

COUNTRIES & JURISDICTIONS WITH A SPANISH FRANCHISE PRESENCE		
Countries	Number of Brands	Number of Stores
Albania	7	8
Algeria	11	15
Andorra	94	115
Angola	9	39
Argentina	25	1,045
Armenia	10	17
Aruba	6	7
Australia	7	41
Austria	17	89
Azerbaijan	9	23
Bahamas	1	1
Bahrain	12	18
Belarus	7	13
Belgium	32	240
Benin	1	1
Bermuda	2	2
Bolivia	10	15
Bosnia	8	35
Brazil	20	1,684
Bulgaria	17	85
Burkina Faso	1	1
Cambodia	3	5
Cameroon	1	1
Canada	7	49
Cape Verde	3	8
Cayman Islands	1	1
Chile	36	299
China	31	802
Columbia	48	312
Congo	1	1
Costa Rica	22	45
Côte d´Ivoire	3	4
Croatia	13	88
Cuba	7	35
Curacao	3	4
Cyprus	19	69
Czech Republic	18	150
Denmark	6	15
Dominican Republic	35	109
Ecuador	28	124
Egypt	20	78
El Salvador	13	61
Equatorial Guinea	2	3
Estonia	8	13
Finland	4	20
France	78	1,637
Georgia	8	15
Germany	30	485

Ghana	2	5
Gibraltar	8	8
Greece	23	247
Guadeloupe	1	1
Guatemala	29	147
Guinea Conakry	1	1
Haiti	1	1
Honduras	15	28
Hungary	15	83
Iceland	1	1
India	6	85
Indonesia	6	35
Iran	7	14
Iraq	1	1
Ireland	12	41
Israel	13	149
Italy	63	2,390
Jamaica	1	1
Japan	13	217
Jordan	19	38
Kazakhstan	12	63
Kosovo	1	2
Kuwait	27	59
Kyrgyzstan	1	2
Latvia	8	20
Lebanon	21	76
Libya	5	8
Lithuania	9	30
Luxembourg	13	17
Macedonia	8	9
Madagascar	1	1
Malaysia	11	108
Malta	12	20
Mauritania	1	1
Mauritius	3	8
Mexico	100	1,390
Moldova	3	3
Monaco	2	2
Mongolia	1	2
Montenegro	5	5
Morocco	41	113
Mozambique	2	4
Myanmar	1	1
Namibia	1	3
Netherlands	2	3
New Caledonia	1	1
New Zealand	2	2
Nicaragua	8	8
Nigeria	2	4
Norway	7	37

Oman	8	9
Pakistan	2	4
Panama	44	91
Paraguay	9	17
Peru	32	229
Philippines	15	86
Poland	24	837
Portugal	201	2,880
Puerto Rico	10	22
Qatar	28	73
Reunion	1	1
Romania	36	266
Russia	32	908
San Marino	2	2
Saudi Arabia	34	349
Senegal	3	3
Serbia	12	46
Singapore	12	73
Sint Maarten	3	3
Slovakia	17	82
Slovenia	13	40
South Africa	4	61
South Korea	17	115
Sri Lanka	1	1
Sudan	1	1
Surinam	1	1
Sweden	13	53
Switzerland	24	132
Syria	4	7
Taiwan	9	53
Tanzania	1	1
Thailand	12	71
Tunisia	10	20
Turkey	13	368
Ukraine	13	102
United Arab Emirates	34	160
United Kingdom	44	308
United States of America	40	641
Uruguay	10	12
Venezuela	32	666
Vietnam	8	22
TOTAL COUNTRIES & JURISDICTIONS		**139**

Number of countries with a Spanish Franchise presence, by geographical area

- Europe: 45
- America: 32
- Asia: 23
- Middle East: 10
- Africa: 26
- Oceania: 3
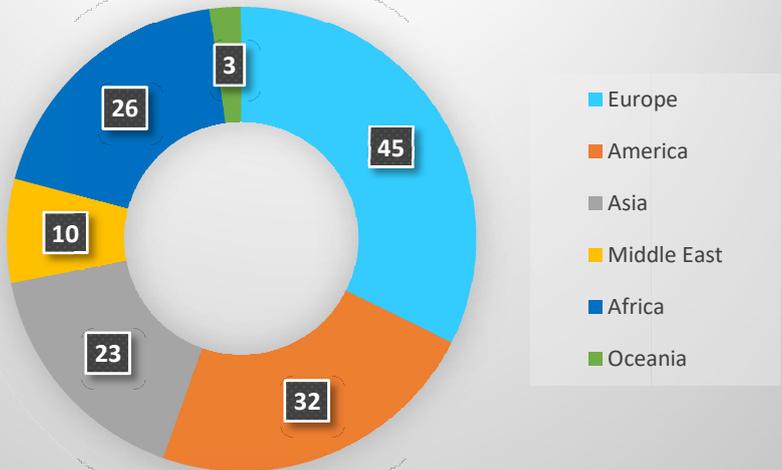
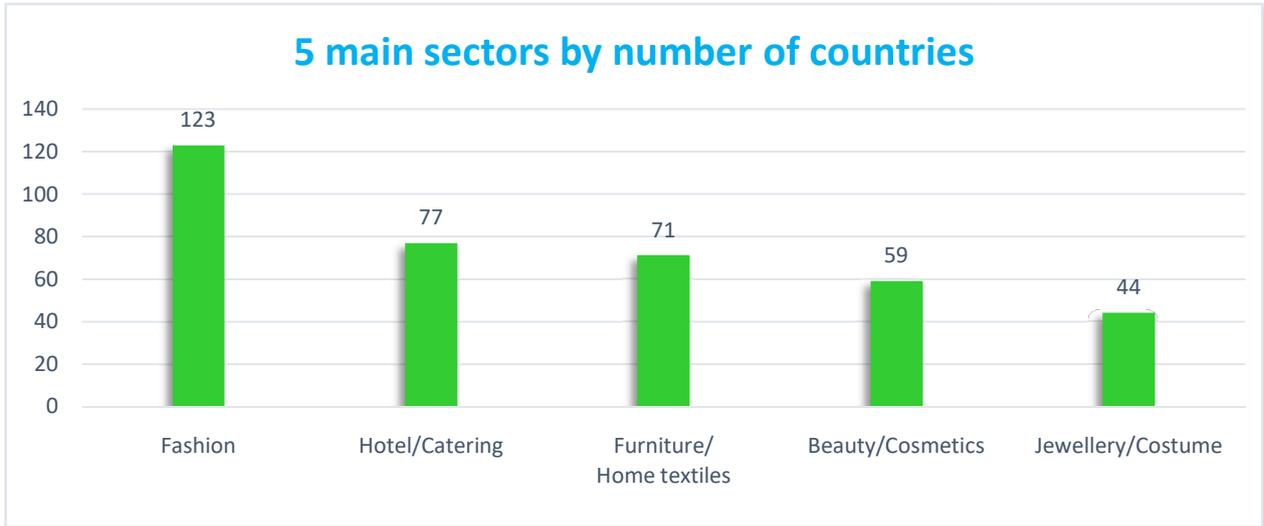## The top 10 countries by number of operational Spanish brands
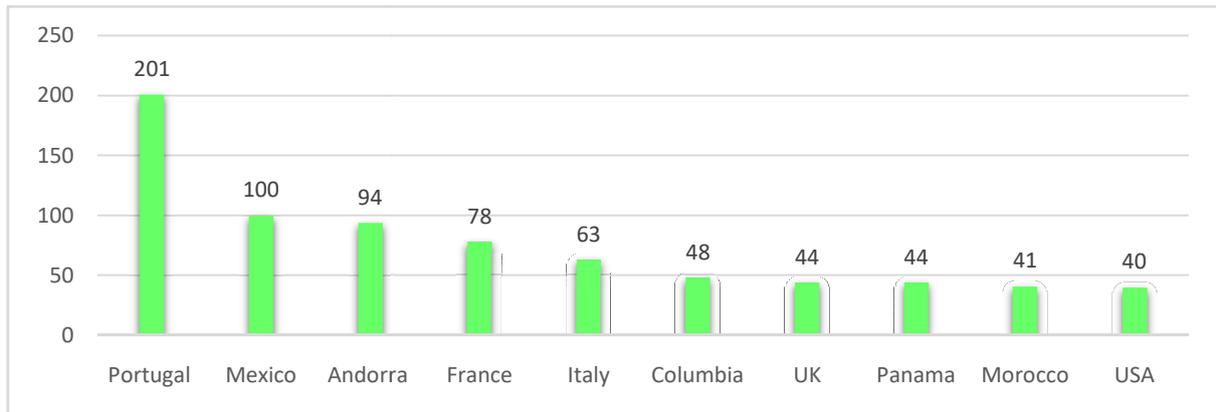
The first five positionsareunchanged, both in terms of country and relative position, to those that appeared in the 2017 Report.

Portugal has 60.1% of total Spanish franchises abroad (201), a big gap from the second, Mexico, where 29.9% of the brands (100) now have outlets. It is followed by Andorra in third place with 28.1% (94 networks), in this case for obvious reasons of proximity and ease of implementation.

In absolute numbers, we highlight that Columbia has risen to sixth place with the introduction of 6 new brands compared to the previous year, while the United Kingdom and Panama, with 44 brands each, Morocco, with 41, and the United States, with 40, complete these first 10 positions.

By sector, the first five activities by number of countries are Fashion, with presence in 123 markets, then by Hotel/Catering, with 77, Furniture/Home textiles, with 71; Beauty/Cosmetics, with 59, and Jewellery/Costume, with 44.

5 main sectors by number of countries

Sector	Number
Fashion	123
Hotel/Catering	77
Furniture/Home textiles	71
Beauty/Cosmetics	59
Jewellery/Costume	44

The top 10 countries by number of operational Spanish brand stores

5 main sectors by number of countries

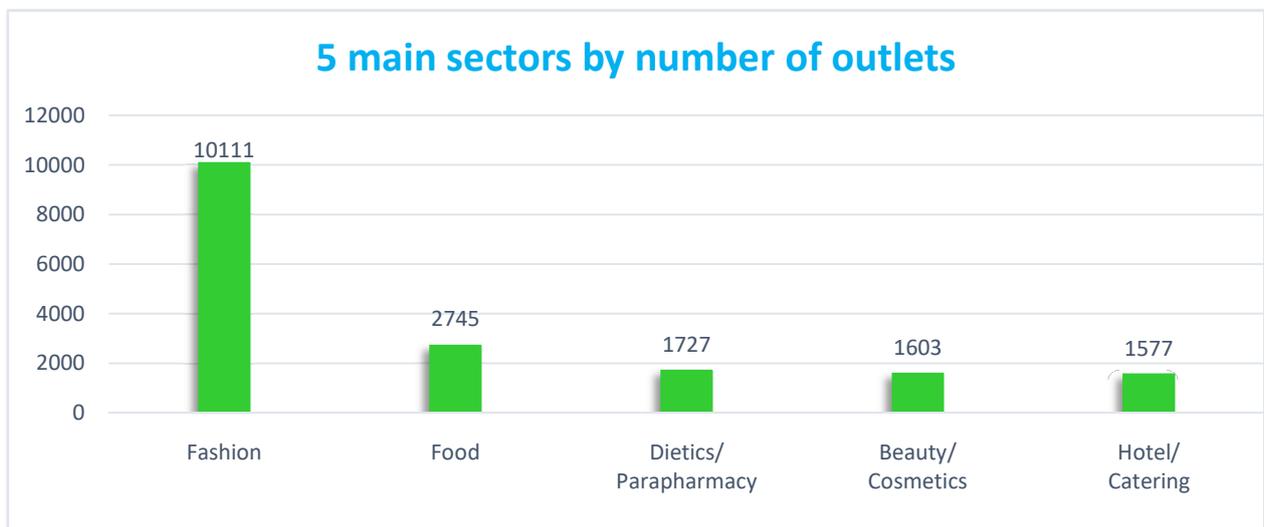| Country	Number
Portugal	2880
Italy	2390
Brazil	1684
France	1637
Mexico	1390
Argentina	1045
Russia	908
Poland	837
China	802
Venezuela	666
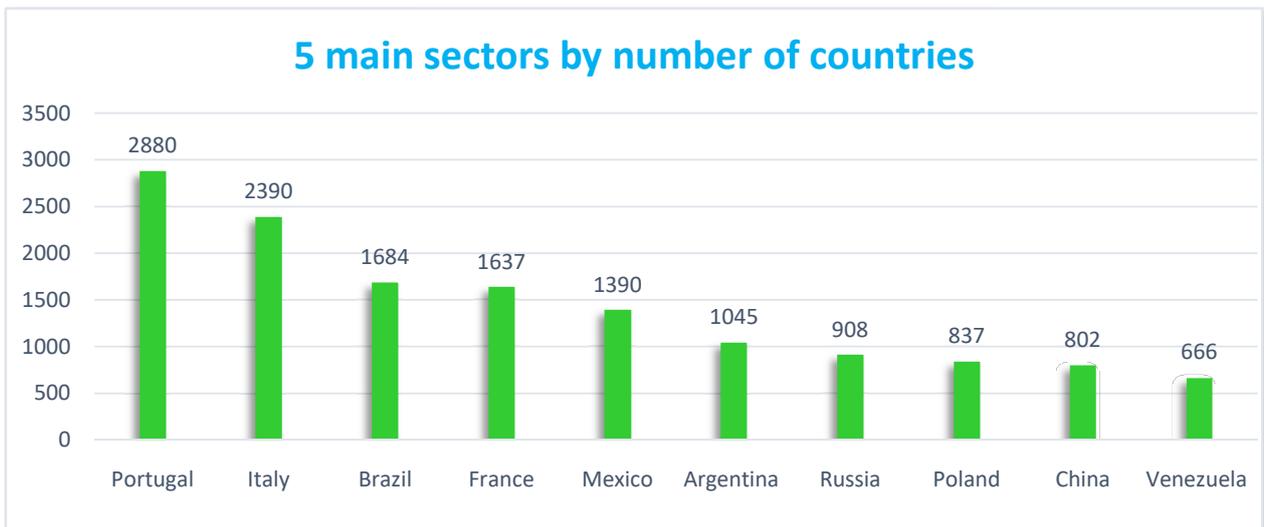
It is worth noting that these top 10 countries by number of Spanish franchise outletsaccount for 14,239 establishments i.e. 64.21% of the total.

AEF   SPANISH FRANCHISES WORLDWIDE- 2018

Portugal, as is logical given the number of brands that operate there, is clearly in first place, with 2,880 outlets, followed by Italy, with 2,390, and Brazil, in third place, with 1,684 stores.

Particularly noteworthy is the growth experienced by Argentina, which is now in sixth position, with 1,045 outlets, as well as the appearance of Venezuela, for the first time in this statistic, in tenth position with 666 stores.

Also noteworthy are the 908 outlets opened in Russia, now in seventh place, the 837 in Poland in eighth, and the 802 in China, in ninth position.

By sectors, Fashion has the most outlets open abroad, with a total of 10,111 (45.1% of the total), followed by Food, with 2,745 (12.2%); Dietetics / Pharmaceuticals, with 1,727 (7.7%); Beauty/Cosmetics, with 1,603 (7.1%); and Hotel/Catering, with 1,577 (7%).

5 main sectors by number of outlets

Sector	Number of outlets
Fashion	10111
Food	2745
Dietics/Parapharmacy	1727
Beauty/Cosmetics	1603
Hotel/Catering	1577

Annexes

Europe			
	Sectors	Number of Brands	Number of Outlets
Albania	1	7	8
Andorra	16	94	115
Austria	7	17	89
Belarus	2	7	13
Belgium	12	32	240
Bosnia	2	8	35
Croatia	4	13	88
Cyprus	4	19	69
Czech Republic	7	18	150
Denmark	3	6	15
Estonia	2	8	13
Finland	2	4	20
France	20	78	1,637
Germany	11	30	485
Gibraltar	6	8	8
Greece	9	23	247
Hungary	5	15	83
Iceland	1	1	1
Ireland	4	12	41
Italy	18	63	2,390
Kosovo	1	1	2
Latvia	3	8	20
Lithuania	4	9	30
Luxembourg	5	13	17
Macedonia	1	8	9
Malta	3	12	20
Moldova	3	3	3
Monaco	2	2	2
Montenegro	1	5	5
Netherlands	8	2	3
Norway	4	7	37
Poland	8	24	837
Portugal	27	201	2,880
Romania	13	36	266
Russia	8	32	908
San Marino	2	2	2
Serbia	2	12	46
Sweden	5	13	53
Switzerland	8	24	132
Turkey	4	13	368
Ukraine	3	13	102
United Kingdom	13	44	308
TOTAL COUNTRIES: 45			12,157

America			
	Sectors	Number of Brands	Number of Outlets
Argentina	13	25	1,045
Aruba	3	6	7
Bahamas	1	1	1
Bermuda	1	2	2
Bolivia	6	10	15
Brazil	10	20	1,684
Canada	2	7	49
Chile	12	36	299
Columbia	14	48	312
Costa Rica	6	22	45
Cuba	7	7	35
Curacao	2	3	4
Ecuador	12	28	124
United States of America	16	40	641
El Salvador	5	13	61
Guadeloupe	1	1	1
Guatemala	10	29	147
Haiti	1	1	1
Honduras	7	15	28
Cayman Islands	1	1	1
Jamaica	1	1	1
Mexico	20	100	1,390
Nicaragua	3	8	8
Panama	12	44	91
Paraguay	6	9	17
Peru	13	32	229
Puerto Rico	8	10	22
Dominican Republic	13	35	109
Sint Maarten	3	3	3
Surinam	1	1	1
Uruguay	9	10	12
Venezuela	11	32	666
TOTAL COUNTRIES: 32			7,051

Oceania			
	Sectors	Number of Brands	Number of Stores
Australia	5	7	41
New Caledonia	1	1	1
New Zealand	2	2	2
TOTAL COUNTRIES: 3			**44**

Africa			
	Sectors	Number of Brands	Number of Outlets
Algeria	4	11	15
Angola	7	9	39
Benin	1	1	1
Burkina Faso	1	1	1
Cape Verde	3	3	8
Cameroon	1	1	1
Congo Brazzaville	1	1	1
Côte d´Ivoire	3	3	4
Egypt	5	20	78
Ghana	2	2	5
Conakry Guinea	1	1	1
Equatorial Guinea	2	2	3
Reunion	3	3	3
Libya	2	5	8
Madagascar	1	1	1
Morocco	13	41	113
Mauritius	2	2	8
Mauritania	1	1	1
Mozambique	2	2	4
Namibia	1	1	3
Nigeria	2	2	4
Senegal	3	3	3
South Africa	2	4	61
Sudan	1	1	1
Tanzania	1	1	1
Tunisia	5	10	20
TOTAL COUNTRIES: 26			**388**

Asia			
	Sectors	Number of Brands	Number of Outlets
Armenia	2	10	17
Azerbaijan	2	9	23
Cambodia	2	3	5
China	10	31	802
South Korea	7	17	115
Philippines	3	15	86
Georgia	2	8	15
India	3	6	86
Indonesia	4	6	35
Iraq	1	1	1
Iran	2	7	14
Japan	5	13	217
Kazakhstan	2	12	63
Kyrgyzstan	1	1	2
Malaysia	5	11	108
Mongolia	1	1	2
Myanmar	1	1	1
Pakistan	1	2	4
Singapore	2	12	73
Sri Lanka	1	1	1
Thailand	4	12	71
Taiwan	2	9	53
Vietnam	3	8	22
TOTAL COUNTRIES: 23		1,816	

Middle East			
	Sectors	Number of Brands	Number of Outlets
Saudi Arabia	7	34	349
Bahrain	3	12	18
United Arab Emirates	8	34	160
Israel	4	13	149
Jordan	4	19	38
Kuwait	2	27	59
Lebanon	4	21	76
Oman	4	8	9
Qatar	7	28	73
Syria	1	4	7
TOTAL COUNTRIES: 10884			

Exporting franchisor centres by Autonomous Community

Autonomous Communities	Number of Brands	%
Catalonia	113	33.83
Madrid	92	17.54
Andalusia	35	10.48
Valencian Community	32	9.58
Galicia	19	5.69
Balearic Islands	7	2.10
Aragon	6	1.80
Castile & Leon	6	1.80
Murcia	6	1.80
Asturias	4	1.19
Castile-La Mancha	4	1.19
Canary Islands	3	0.90
Extremadura	3	0.90
Basque country	2	0.60
La Rioja	1	0.30
Navarre	1	0.30
	334	**100**