

STATISTICAL SERVICE OF THE AEF (Spanish Franchise Association)

SPANISH FRANCHISING IN THE WORLD

2019 REPORT



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Introductions

AEF

The Spanish Franchise Association (AEF Spanish acronym) was founded in the year 1993. It was born with the clear objective of representing, safeguarding and defending the interests of the franchise system in Spain, as well as acting as a counterparty with the various public administrations, institutions and organisations. Its goals to advocate the advantages and added values that this business model offers, and to advise and inform all businesspeople that plan to start a franchise business and become entrepreneurs.



Luisa Masuet
President
Spanish Franchise
Association

With this in mind, we feel that one of the actions that could help provide transparency in the effective work and functioning of the franchise system would be a study that gathers in a reliable, objective and independent manner, the reality of this business collaboration formula, using verified data to transmit to the market. This is an initiative that we launched in 2002, and which has enabled us to provide this statistical information for 18 consecutive years.

The study “Spanish Franchising in the World (“La Franquicia Española en el Mundo”) presents a complete radiography of the situation of Spanish franchises across five continents, broken down by country; sector; open outlets; the top markets with a presence of Spanish networks; and a list of the most highly exporting Autonomous Communities.

Over the years, this study has become the reference for all local, regional and national media, as well as for the different public administrations and organisations, as it is considered as the official statistical report on Spanish franchises abroad. This is a great source of satisfaction for our Association, and we now wish to share this with the Cajamar Cooperative Group, an entity to which we express our most sincere gratitude for their collaboration and support in the dissemination this national study, making it available to a greater number of social and economic stakeholders.

Finally, we would like to highlight that this study “Spanish Franchising in the World” is the fruit of many hours of labour, verifying data, and making comparisons for which we would like to thank all those whose involvement has made it possible for you to hold this final result in your hands.



Ricardo García Lorenzo
Staff Business Management.
BCC-Grupo Cajamar

Cajamar Cooperative Group

Once again this year, the Cajamar Cooperative Group supports this initiative of the AEF, which provides valuable information to entrepreneurs in Spain, contributes to their decision-making process and shows the possibilities this business model possesses on a global level.

In the following pages you can see that the establishment of Spanish franchises in foreign markets is still in the early stages of sustained growth in recent years, expanding its international presence. The characteristics of this business model make it one of the greatest potential vehicles for entrepreneurship and business growth, while at the same time reducing the risks compared to traditional business, as it allows for the reduction in entry barriers and for the use of economies of scale to compete in an increasingly aggressive and constantly changing global market.

In the Cajamar Cooperative bank we are committed to continuing to support a sector that we consider to be one of the great drivers of commerce in Spain, and one of the business growth mediums with the greatest potential for entrepreneurs, the self-employed and small business owners. Therefore, we are increasing the concession of financing to franchisees and franchisors, designing products and services tailored to their needs, signing agreements with those who are interested, and, to this effect, collaborating with the Spanish Franchise Association.

For this purpose, we have been designing a complete catalogue of financial products and services that, in a specific way, provide concrete solutions to the needs of a franchise at any moment. We also provide you with global tools such as the Cajamar Retail Platform, unique in this market, which integrates the best experts in advice, technology and sales in Spain; and for expansion in the foreign market; franchisors can help themselves with the Cajamar International Platform, where they can find integral products and services from 15 first-rate companies.

Our objective is to walk alongside these franchisors and franchisees and grow with them, not as just another financial provider, but as a long-term strategic partner with closeness and knowledge, offering them solutions that add value and improve their competitiveness

Spanish Franchising in the World 2019

The conclusions of the international statistics for 2019 are truly positive, as they have been now for several years, showing how the commitment of the Spanish franchise system to expand in foreign markets is accentuated.

Firstly, we shall highlight the three general lines of the present study, which obtain the following results:

- **Spanish presence in 140 countries**
(1 country more than in the 2018 report)
- **353 franchise brands are exporting**
(19 brands more than in the previous report (334), a 5.6% increase)
- **Spain has 21,916 franchises in foreign markets**
(478 outlets less than in the previous report (22,394), representing a decrease of 2.2%), attributable to the policy of large fashion brands to close small outlets and open fewer, but larger, outlets, which causes the number of outlets in this sector to number 582 less.

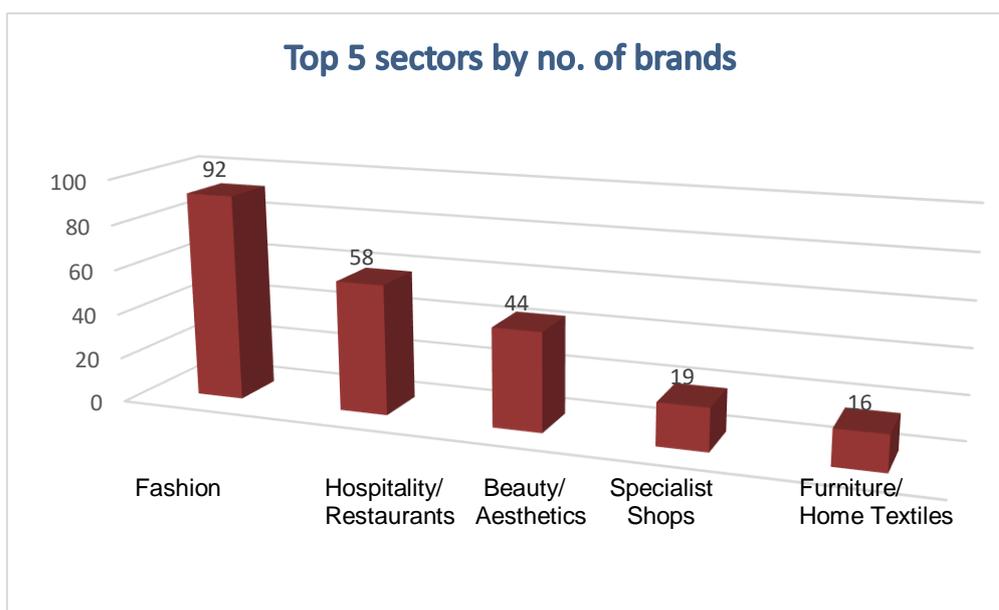
If we start on the basis that of the 1,376 stores that operate in Spain, 246 are of foreign origin, we are left with a total of 1,130 Spanish franchises, so **the 353 exporting brands represent 31.2% of the total** to be considered.

Evolution by sector

In the following table, it is evident that the Fashion sector remains in first place, now with 92 brands (26% of the total), an activity which is followed at some distance by the Hospitality/Restaurant sector with 58 brands (16.4%), and the Beauty/Aesthetic sector with 44 brands, (12.4%). These three sectors, with a total of 194 brands, account for 55.5% of the total.

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

Sector	No. of brands
Travel Agencies	5
Real Estate Agencies	4
Food	13
Beauty & Aesthetics	44
Leisure Centres	8
Health Centres	5
Sports	3
Dietetics& Pharmaceuticals	4
Renewable Energies	5
Teaching & Training	10
Gyms	2
Hospitality & Restaurants	58
IT	11
Jewellery/Trinkets	3
Laundries/Dry-Cleaning	11
Furniture – Home Textiles	16
Fashion	92
Office/Stationary	4
Optics/Audiometry/Photography	5
Advisory Services	6
Automotive Services	6
Financial Services	2
Cleaning Services	2
Transportation Services	6
Various Services	9
Specialised Shops	19
TOTALS	353



Evolution of the number of outlets

Sector	No.of outlets
Travel Agencies	251
Real Estate Agencies	107
Food	2,810
Beauty & Aesthetics	1,629
Leisure Centres	33
Health Centres	122
Sports	7
Dietetics & Pharmaceuticals	1,728
Renewable Energies	160
Teaching & Training	104
Gyms	17
Hospitality & Restaurants	1,589
IT	864
Jewellery/Trinkets	310
Laundries/Dry-Cleaning	660
Furniture – Home Textiles	626
Fashion	9,529
Office & Stationery	26
Optics/Audiometry/Photography	156
Advisory Services	59
Automotive Services	14
Financial Services	5
Cleaning Services	10
Transportation Services	466
Various Services	124
Specialised Shops	510
TOTALS	21,916

The net decrease in the number of outlets during last year aggregated 478 units. In terms of percentage, 2019 was 2.2% lower than the previous year.

Analysis by countries and territories

The number of countries where Spanish franchises is present increased by 1 with respect to the previous year, so that in 2019 the figure is 140 markets, where there is already presence of Spanish brands.

With regard to the sectors with the greatest presence by number of countries, the first three positions correspond to:

- Fashion, which remains in first position, with a presence in 125 countries;
- Hospitality/Restaurants, with a presence in 81 different countries;
- Furniture/Home Textiles, with a presence in 73 countries;

Sector	No. of countries
Travel Agencies	9
Real Estate Agencies	8
Food	13
Beauty & Aesthetics	51
Leisure Centres	19
Health Centres	4
Sports	3
Dietetics& Pharmaceuticals	22
Renewable Energies	14
Teaching & Training	33
Gyms	2
Hospitality & Restaurants	81
IT	24
Jewellery/Trinkets	47
Laundries/Dry-Cleaning	39
Furniture - Home Textiles	73
Fashion	125
Office & Stationery	7
Optics/Audiometry/Photography	22
Advisory Services	16
Automotive Services	5
Financial Services	2
Cleaning Services	3
Transportation Services	7
Various Services	28
Specialised Shops	40

COUNTRIES & TERRITORIES WHERE SPANISH FRANCHISES ARE PRESENT

Countries	Sector	No. of brands	No. of outlets
Albania	1	7	8
Algeria	4	12	15
Andorra	18	95	123
Angola	7	10	56
Argentina	12	24	1,042
Armenia	2	10	17
Aruba	3	7	9
Australia	5	6	30
Austria	5	13	85
Azerbaijan	2	9	22
Bahamas	1	1	1
Bahrain	3	11	15
Belarus	2	9	15
Belgium	13	34	259
Bermuda	1	2	3
Bolivia	6	12	18
Bosnia	3	9	35
Brazil	11	22	1,743
Bulgaria	9	17	85
Burkina Faso	1	1	1
Cambodia	2	3	4
Cameroon	1	1	1
Canada	3	8	50
Cape Verde	3	3	10
Cayman Islands	1	1	1
Chile	14	35	331
China	10	28	759
Colombia	13	45	320
Congo Brazzaville	1	1	1
Costa Rica	4	19	45
Croatia	4	13	90
Cuba	7	8	36
Curaçao	2	2	3
Cyprus	4	19	68
Czech Republic	7	17	154
Denmark	3	6	18
Dem. Rep. of Congo	1	1	1
Dominican Rep.	13	34	108
Ecuador	11	27	121

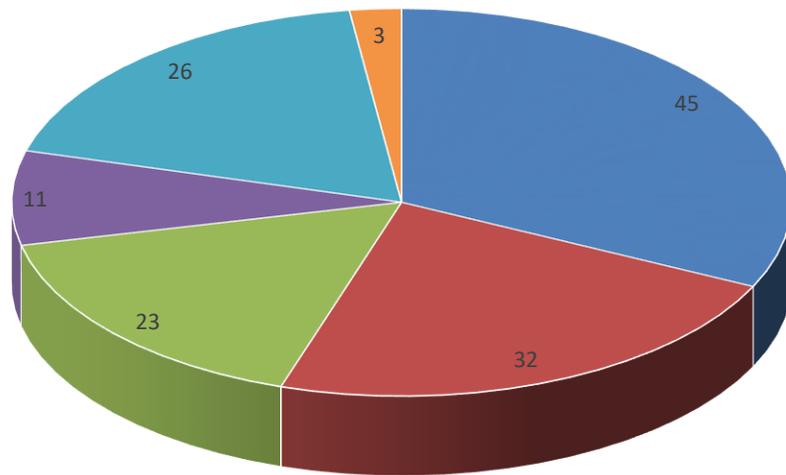
Countries	Sector	No. of brands	No. of outlets
Egypt	5	21	79
El Salvador	5	13	64
Estonia	2	8	12
Equat. Guinea.	3	4	7
Finland	2	4	19
France	19	79	1,650
Georgia	2	8	15
Germany	11	30	506
Ghana	1	1	1
Gibraltar	6	8	8
Greece	9	24	243
Guadeloupe	1	1	4
Guatemala	10	32	155
Guinea Conakry	1	1	1
Haiti	1	1	1
Honduras	7	15	26
Hungary	4	14	78
Iceland	1	1	1
India	3	7	74
Indonesia	4	12	94
Iran	2	7	24
Ireland	3	12	40
Israel	4	13	161
Italy	18	64	2,383
Ivory Coast	3	3	4
Jamaica	1	1	1
Japan	6	14	207
Jordan	4	19	37
Kazakhstan	2	12	61
Kirghizstan	1	1	2
Kosovo	1	1	2
Kuwait	3	26	57
Latvia	3	8	20
Lebanon	4	20	72
Libya	2	3	6
Lithuania	5	10	33
Luxembourg	5	13	16
Macedonia	1	8	9

Countries	Sector	No. of brands	No. of outlets
Madagascar	1	1	1
Malaysia	4	11	115
Malta	3	12	18
Mauritania	1	1	1
Mauritius	2	3	7
Mexico	23	108	1,400
Moldavia	3	3	3
Monaco	3	3	3
Mongolia	1	1	4
Montenegro	1	6	6
Morocco	13	43	115
Mozambique	3	3	5
Myanmar	1	1	2
Namibia	1	1	3
Netherlands	8	24	168
New Caledonia	1	1	1
New Zealand	1	1	1
Nicaragua	2	7	8
Nigeria	2	2	5
Norway	4	7	18
Oman	4	8	9
Pakistan	1	2	6
Palestine	1	1	1
Panama	12	44	98
Paraguay	6	10	15
Peru	12	34	236
Philippines	3	15	86
Poland	8	24	797
Portugal	26	213	2,907
Puerto Rico	7	8	17
Qatar	7	27	74
Reunion	2	2	2
Romania	14	36	270

Countries	Sector	No. of brands	No. of outlets
Russia	8	33	884
San Marino	2	2	2
Saudi Arabia	7	34	356
Senegal	2	2	2
Serbia	2	12	45
Singapore	3	13	72
Sint Maarten	3	3	3
Slovakia	5	16	69
Slovenia	4	13	39
South Africa	2	5	38
South Korea	6	16	110
Sri Lanka	1	1	2
Sudan	1	1	1
Surinam	1	1	1
Sweden	5	13	51
Switzerland	8	24	120
Syria	1	3	5
South Africa	2	5	38
Sweden	5	13	51
Switzerland	8	24	120
Surinam	1	1	1
Taiwan	2	8	45
Tanzania	1	1	1
Thailand	4	10	51
Tunisia	5	11	25
Turkey	4	13	352
U.A. Emirates.	8	33	153
Ukraine	3	13	97
United Kingdom	13	44	275
Uruguay	9	10	12
USA	15	41	191
Uzbekistan	1	1	1
Venezuela	12	31	617
Vietnam	3	8	18

Total Countries & Territories: 140

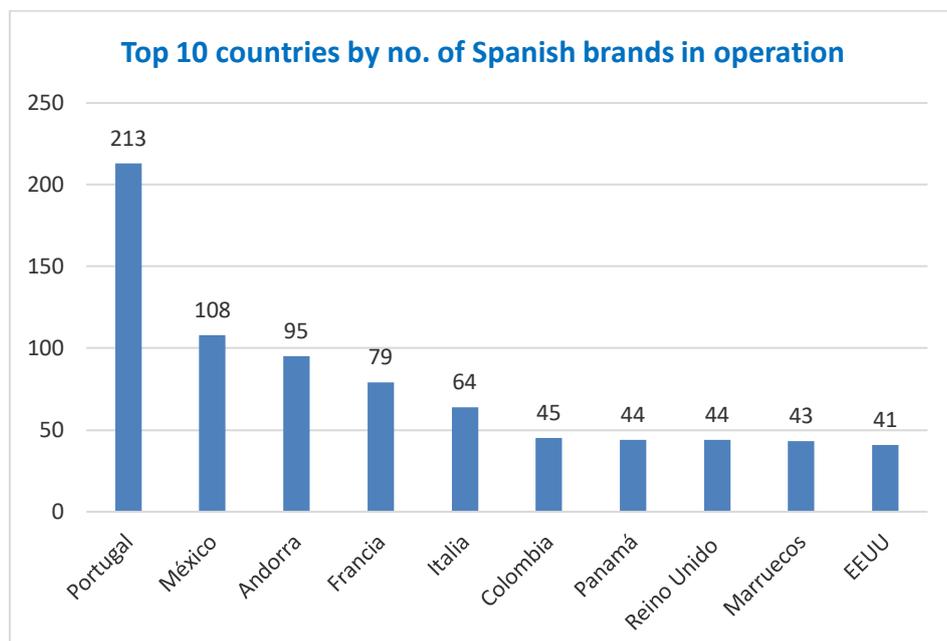
No. of countries with a presence of Spanish franchises, by geographical area



■ Europa ■ América ■ Asia ■ Oriente Medio ■ África ■ Oceanía

Europe America Asia Middle East Africa Australasia

Top 10 countries by number of Spanish brands in operation



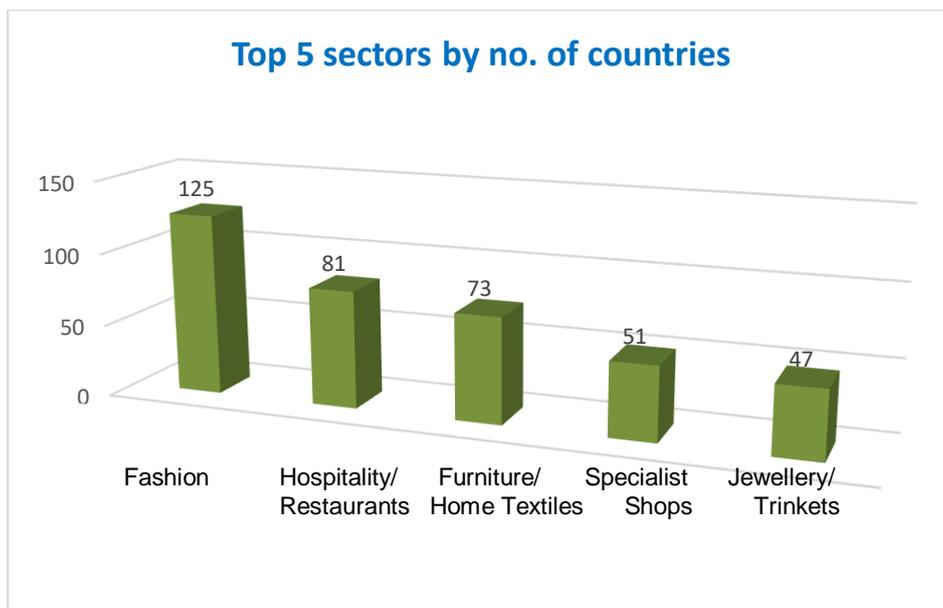
Portugal; Mexico; Andorra; France; Italy; Colombia; Panama; United Kingdom; Morocco; USA

The top five countries are the same and in the same order as in the previous year's report.

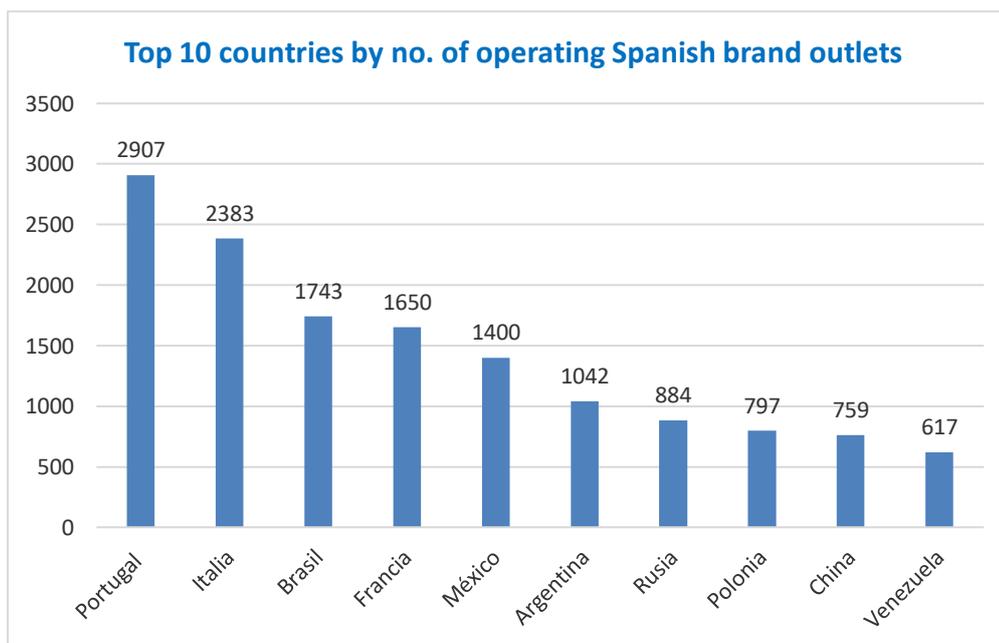
Portugal has 60.3% of the total number of Spanish franchises abroad, (213), a long way ahead of the second country: Mexico, where 30.5% of brands (108) already have outlets. Andorra follows in third place, with 26.9% (95 networks), in this case for obvious reasons of proximity and ease of establishment; France, is in fourth place, with 79 outlets and Italy in fifth place, with 64.

In turn, we highlight that Colombia remains in sixth place with 45 brands, whilst Panama and the United Kingdom, with 44 brands each, Morocco, with 43 and the United States, with 41, complete these top 10 positions.

By sector, the top five activities by number of countries are Fashion, with a presence in 125 markets; followed by Hospitality/Restaurants, with 81; Furniture/Home Textiles, with 73; Beauty/Aesthetic, with 51; and Jewellery/Trinkets, with 47.



Top 10 countries by number of operating Spanish brand outlets



Portugal; Italy; Brazil; France; Mexico; Argentina; Russia; Poland; China; Venezuela

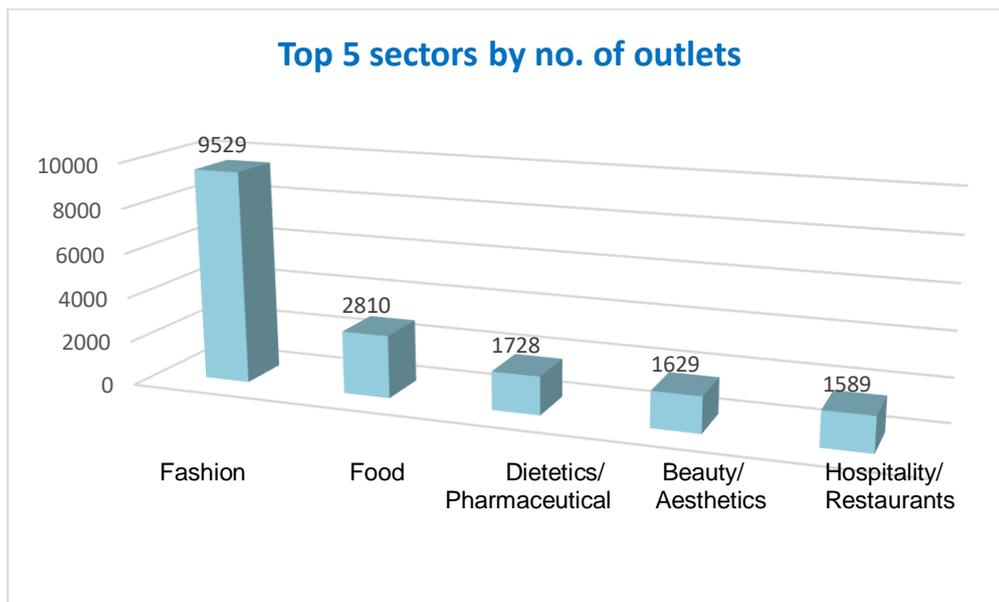
It should be noted that these top 10 countries by number of Spanish franchise outlets account for 14,182 outlets, or in other words, 64.7% of the total.

Portugal, as would be expected from the number of brands operating there, continues clearly in first place, with 2,907 outlets; followed by Italy, with 2,383; and Brazil in third place, with 1,743 stores.

In fourth place is France, with 1,650 outlets; next is Mexico, with 1,400; and Argentina, in sixth place, with 1,042 stores.

Also noteworthy are the 884 outlets open in Russia, in seventh place; the 797 in Poland, in eighth place; the 759 in China, in ninth place; and the statistics end with Venezuela, with 617 stores.

By sector, Fashion is the sector with the most outlets open abroad, with a total of 9,529 (43.4% of the total); followed by Food, with 2,810 (12.8%); Dietetics/Pharmaceuticals, with 1,728 (7.8%); Beauty/Aesthetics, with 1,629 (7.4%); and Hospitality/Restaurants, with 1,589 (7.2%).



Annexes

<u>Europe:</u>	<u>Sector</u>	<u>No. of brands</u>	<u>No. of outlets</u>
Albania	1	7	8
Andorra	18	95	123
Austria	5	13	85
Belarus	2	9	15
Belgium	13	34	259
Bosnia	3	9	35
Bulgaria	9	17	85
Croatia	4	13	90
Cyprus	4	19	68
Czech Republic	7	17	154
Denmark	3	6	18
Estonia	2	8	12
Finland	2	4	19
France	19	79	1,650
Germany	11	30	506
Gibraltar	6	8	8
Greece	9	24	243
Hungary	4	14	78
Iceland	1	1	1
Ireland	3	12	40
Italy	18	64	2,383
Kosovo	1	1	2
Latvia	3	8	20
Lithuania	5	10	33
Luxembourg	5	13	16
Macedonia	1	8	9
Malta	3	12	18
Moldavia	3	3	3
Monaco	3	3	3
Montenegro	1	6	6
Netherlands	8	14	168
Norway	4	7	18
Poland	8	24	797
Portugal	26	213	2,907
Romania	14	36	270
Russia	8	33	884
San Marino	2	2	2
Serbia	2	12	45
Slovakia	5	16	69
Slovenia	4	13	39
Sweden	5	13	51
Switzerland	8	24	120
Turkey	4	13	352
Ukraine	3	13	97
United Kingdom	13	44	275
45			12,084

The Americas	Sector	No. of brands	No. of outlets
Argentina	12	24	1,042
Aruba	3	7	9
Bahamas	1	1	1
Bermuda	1	2	3
Bolivia	6	12	18
Brazil	11	22	1,743
Canada	3	8	50
Cayman Islands	1	1	1
Chile	14	35	331
Colombia	13	45	320
Costa Rica	4	19	45
Cuba	7	8	36
Curaçao	2	2	3
Dominican Rep.	13	34	108
Ecuador	11	27	121
El Salvador	5	13	64
Guadeloupe	1	1	4
Guatemala	10	32	155
Haiti	1	1	1
Honduras	7	15	26
Jamaica	1	1	1
Mexico	23	108	1,400
Nicaragua	2	7	8
Panama	12	44	98
Paraguay	6	10	15
Peru	12	34	236
Puerto Rico	7	8	17
Sint Maarten	3	3	3
Surinam	1	1	1
Uruguay	9	10	12
USA	15	41	191
Venezuela	12	31	617
32			6,680

Australasia	Sector	No. of brands	No. of outlets
Australia	5	6	30
New Caledonia	1	1	1
New Zealand	1	1	1
3			32

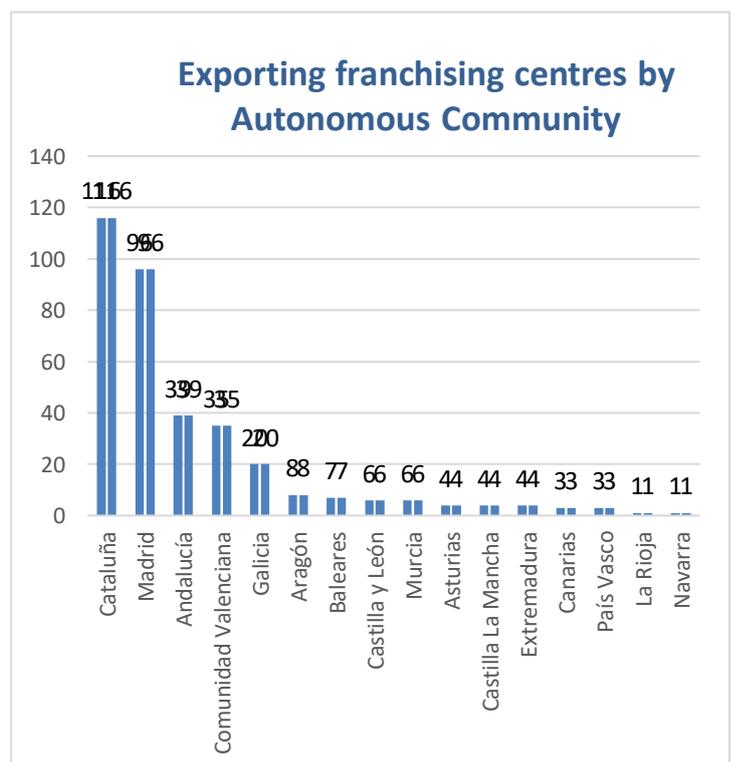
Africa	Sector	No. of brands	No. of outlets
Algeria	4	12	15
Angola	7	10	56
Burkina Faso	1	1	1
Cameroon	1	1	1
Cape Verde	3	3	10
Congo Brazzav.	1	1	1
Dem. Rep Congo	1	1	1
Egypt	5	21	79
Equat. Guinea	3	4	7
Ghana	1	1	1
Guinea Conack.	1	1	1
Ivory Coast	3	3	4
Libya	2	3	6
Madagascar	1	1	1
Mauritania	1	1	1
Mauritius	2	3	7
Morocco	13	43	115
Mozambique	3	3	5
Namibia	1	1	3
Nigeria	2	2	5
Reunion	2	2	2
Senegal	2	2	2
South Africa	2	5	38
Sudan	1	1	1
Tanzania	1	1	1
Tunisia	5	11	25
26			389

Mid. East	Sector	No. of brands	No. of outlets
Bahrain	3	11	15
Israel	4	13	161
Jordan	4	19	37
Kuwait	3	26	57
Lebanon	4	20	72
Oman	4	8	9
Palestine	1	1	1
Qatar	7	27	74
Saudi Arabia	7	34	356
Syria	1	3	5
U.A. Emirates.	8	33	153
11			940

Asia:	Sectors	No. of brands	No. of outlets
Armenia	2	10	17
Azerbaijan	2	9	22
Cambodia	2	3	4
China	10	28	759
Georgia	2	8	15
India	3	7	74
Indonesia	4	12	94
Iran	2	7	24
Japan	6	14	207
Kazakhstan	2	12	61
Kirghizstan	1	1	2
Malaysia	4	11	115
Mongolia	1	1	4
Myanmar	1	1	2
Pakistan	1	2	6
Philippines	3	15	86
Singapore	3	13	72
South Korea	6	16	110
Sri Lanka	1	1	2
Taiwan	2	8	45
Thailand	4	10	51
Uzbekistan	1	1	1
Vietnam	3	8	18
23			1,791

Exporting franchising centres by Autonomous Community

Autonomous Communities	No. of brands	%
Catalonia	116	32.86
Madrid	96	27.20
Andalusia	39	11.05
Valencia	35	9.92
Galicia	20	5.67
Aragon	8	2.27
Balearic Islands	7	1.98
Castile and Leon	6	1.70
Murcia	6	1.70
Asturias	4	1.13
Castile La Mancha	4	1.13
Extremadura	4	1.13
Canary Islands	3	0.85
Basque Country	3	0.85
Rioja	1	0.28
Navarre	1	0.28



Total

353

100.00

Bilateral agreements signed between the AEF and Latin American Associations



Argentina

ARGENTINIAN ASSOCIATION OF BRANDS AND FRANCHISES

aamf.com.ar



Colombia

COLOMBIAN FRANCHISE CHAMBER (COLFRANQUICIAS)

colfranquicias.com



Guatemala

GUATAMALAN FRANCHISE ASSOCIATION

guatefranquicias.org



Mexico

MEXICAN FRANCHISE ASSOCIATION (AMF Spanish acronym)

franquiciasmexico.org.mx



Peru

PERUVIAN FRANCHISE ASSOCIATION

cpfranquicias.com



Portugal

PORTUGUESE FRANCHISE ASSOCIATION

associacaofranchising.pt



Venezuela

VENEZUELAN FRANCHISE CHAMBER (PROFRANQUICIAS)

profranquicias.com



2019 World Franchise Council (WFC)

The **World Franchise Council** (WFC) was held for the first time in Spain, specifically in Madrid, by the Spanish Franchise Association, and took place during 4th- 5th April 2019, having been officially opened by the Minister of Industry, Trade and Tourism, Ms Reyes Maroto, and was a resounding success.

This **World Franchise Council** brought together 40 franchise business associations that attended the event representing North America, the Asia-Pacific Confederation, Latin America and Europe, with Spain as the host country.

During these two days, the representatives of these 40 countries held different work meetings, sharing experiences, opinions and setting objectives and lines of action regarding the franchise system. In addition to these professional sessions, there was also time for leisure, with visits to the Bernabeu Real Madrid Football Stadium, the “Golden Mile” of fashion in Calle Serrano, the Reina Sofía Museum, the Madrid of the Habsburgs, etc., before we rounded off the event with a gala dinner, where all the sponsors that collaborated in this important event, including Cajamar Cooperative Group, were given recognition.



- ALAIN AFFLELOU
ÓPTICO Y
AUDIÓLOGO
- ALCAMPO
- ALVATO LUXURY
DETAILING
- BEEP - TICNOVA
- BRICOKING
- CANTINA
MARIACHI
- CAPRABO
- CARL'S JR
- CARLIN

Full Members

- 100 EURO GRUPO DE EURO Y CIA
/DT DETALLES
- 5àsec
- ADK

- CARREFOUR EXPRESS/CARREFOUR
MARKET
- CASH CONVERTERS
- CENTURY 21 España
- CERVECERIA 100 MONTADITOS

■ CeX - Complete Entertainment

Exchange

■ CHARANGA

■ CHOCOLATES VALOR

■ CLÍNICAS FISI(ON)

■ COLOR PLUS

■ CONO PIZZA

■ CRISTALBOX

■ D-UÑAS

■ KIDSBRAIN METHOD

■ LA BOTICA DE LOS PERFUMES

■ LA CHELINDA

■ LA DESPENSA EXPRESS

■ LA MAFIA SE SIENTA A LA MESA

■ LA TAGLIATELLA

■ DE COSAS HOGAR Y MODA

■ DEPASO

■ DIA %

■ DON PISO

■ DULDI

■ ECOX4D5D-ELIXIAN

■ ELEFANTE AZUL – AUTONET & OIL

■ EROSKI CITY

■ EQUIVALENZA

■ EPSServicioAutomotriz

■ EXPENSE REDUCTION ANALYSTS

■ FERRETTI gelato e café

■ FERSAY

■ GENERAL ÓPTICA

■ GINOS

■ HÄAGEN-DAZS

■ INGREDIENTS: CAFÉ

■ INTERDOMICILIO

■ KFC

■ KIDS&US School of English

- LA VENTANA NATURAL
- LASER 2000 CENTRO MÉDICO
- ESPECIALIZADO (VIVANTA)
- LIZARRÁN
- LLAOLLAO
- LOOK& FIND
- MAIL BOXES ETC.
- MANGO - MNG
- MAYORAL
- McDONALD' S
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- OH MY CUT!
- PANNUS
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- PASTA CITY
- PIZZA MÓVIL
- POMODORO pizza pasta burritos

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