

EUROPEAN FOOD HUB



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FOOD **HUB**

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BASQUE COUNTRY: EUROPEAN FOOD HUB

Basque Country at a glance

The Basque Country registers robust economic performance, with 5.4% GDP growth in 2024. Its economy is based on high-value-added sectors, with a service sector which accounts for more than 60% of GDP, while industry remains a key economic driver.

The region also boasts territorial diversity, with rural areas existing alongside modern urban centres.

54.8% of its surface area is wooded, followed by agricultural land (24.8%) and urban and infrastructure areas (6.7%).

Sectoral distribution



FOOD VALUE CHAIN

139.068
Direct jobs

€ **6.838** M

+1.500 companies
+12.900 farms
+180 fishing vessels



LOGISTICS AND MOBILITY

61.132
Direct jobs

€ **14.194** M

+120
companies



AUTOMOTIVE

38.700
Direct jobs

€ **25.000** M

+300
companies



ENERGY

25.986
Direct jobs

€ **15.700** M

+200
companies



ELECTRONICS AND ICT

24.794
Direct jobs

€ **6.561** M

+310
companies



AEROSPACE

17.513
Direct jobs

€ **3.459** M

54
companies



ECO-INDUSTRIES

11.900
Direct jobs

€ **3.138** M

+300
companies



BIO-HEALTH

10.000
Direct jobs

€ **2.400** M

+110
companies



MACHINE TOOLS

4.133
Direct jobs

€ **1.097** M

+120
companies

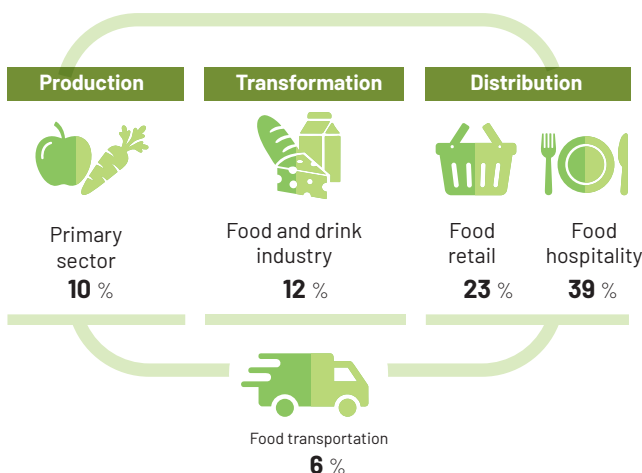
Key Basque Country figures:

- Surface area: **7224.8 km²** (2024 Forestry Map)
- Population: **2,218,210** (01/01/2025)
- GDP per capita: **44,449** (2024)
- Exports/GDP: **35.7%**
- Investment in R&D+i: **2.15%** of GDP
- Labour productivity: **123.6** (EU28: 100)



The food value chain of the Basque Country in greater depth

The Food Value Chain (FVC) spans from the primary sector to consumers and accounts for 9.7% of the Gross Value Added (GVA) of the Basque Country. The following infographic breaks down this GVA across the different links in the value chain.



Instrumental bodies 10 %

of the Basque Ministry of Food, Rural Development, Agriculture and Fisheries



Knowledge and facilitation agents

Technology Centres	Cooperative Research Centers (CIC)	Basque Excellence Research Centres (BERC)	Basque Research and Technology Alliance (BRTA)	Universities and training centres	Clusters
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WHAT BENEFITS DOES THE BASQUE COUNTRY OFFER YOU?



Strategic location and connectivity

The Basque Country, a key logistical node for Europe's food value chain.

Positioned at the heart of Europe's Atlantic Corridor, with multimodal infrastructure (ports, airports and land transport network), the Basque Country enables efficient access to markets, suppliers and distribution channels.



Legal guarantees and fiscal autonomy

A regulatory and fiscal environment which promotes investment in the food chain.

Fiscal autonomy allows the Basque Country to implement tax incentives and deductions for innovation, investment, sustainability and industrial modernisation, while approachable institutions streamline the administration of investments, certifications and regulatory processes.



Strategic institutional vision

Food as a priority sector within national strategy.

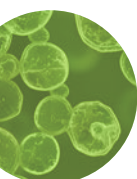
The agri-food ecosystem of the Basque Country is supplemented by institutional plans, such as the 2030 Strategic Gastronomy and Food Plan ('PEGA').



Industrial strength

A business sector linked to the food industry.

The Basque Country's industrial sector contributes 24% to GDP, and is highly diversified and competitive.



Science and innovation ecosystem

Scientific and technological capacities at the service of the food industry.

The Basque Country has a unique RDI ecosystem in place, with 9 technology parks, 4 Cooperative Research Centres (CRC), 6 innovation centres, 4 Business Innovation Centres (BIC), 9 Basque Excellence Research Centres (BERC) as well as the BRTA (Basque Research Technology Alliance), which includes institutions such as Neiker, AZTI and Leartiker specialized in agrifood RDI.



Gastronomic culture and local market

The Basque Country is a global culinary flagship.

With the greatest concentration of Michelin stars per capita (36 at 26 restaurants), and two establishments among “The World’s 50 Best Restaurants” in 2025. There are strong ties to local produce vouched for by recognised certifications of origin and quality, underpinning the prestige and value of Basque products on the market.



Talent and capacities

Specialist talent to transform the food system.

The Basque education system combines academic, university and vocational training excellence with strong links to industry, giving rise to a workforce with qualifications in such key spheres as technology, industrial processes, sustainability and gastronomy, in line with the needs of the sector.



Energy transition and sustainability

The Basque Country is firmly committed to energy transition and sustainability.

In 2025, 21.4% of the energy consumed in the Basque Country came from renewable sources. There has also been a significant improvement in efficient resource usage, generating twice the wealth with the same quantity of materials as in 2005.



An attractive region offering quality of life

The Basque Country combines quality of life with natural beauty, culture and employment, making it an outstanding place to live.

HOW CAN WE **SUPPORT YOU** IN GROWING YOUR PROJECT IN THE BASQUE COUNTRY?



Comprehensive support

The Basque Country provides you with access to a wide range of services to drive the development of your business or project at every stage:

Throughout the whole process

- Assistance and access to grants, financing, skills development and training.

Exploration/Conceptualisation projects

- Identification of start-up platforms, incubators and enterprise seedbeds.
- Coordination of visits with ecosystem agents.
- Access to sectoral information.

Implementation phase

- Assistance and technical review of enterprise initiatives.
- Support in identifying needs and accessing technological, sectoral and market information.
- Search for appropriate locations for the activity.
- Support in relations with public authorities.
- Links to potential suppliers, customers and partners.

Consolidation

- Facilitation of collaboration networks with local and international companies and agents.
- Access to funding and investment instruments, liaison with investment funds.

Scaling

- Springboard for processes of reinvestment and business growth.
- Ease of access to international markets.



Access to finance

The Basque Government's Department of Food, Rural Development and Fisheries announces numerous grant calls each year for participants in the food value chain. The following list sets out the main categories, with the budgets assigned in 2026. These grants can be supplemented by others announced by other departments.

- **Primary sector: €63,1 M**
 - Agri-livestock
Direct grants: **€42 M** and others: **€10 M**
 - Fisheries and aquaculture sector: **>€14.5 M**
- **Investment: €36,8 M**
- **Innovation: €7.1 M**
- **Quality and promotion: €9.5 M**
- **Sectoral structuring: €1,75 M**
- **Rural and coastal development: €19,7 M**



Skills development and training

An extensive catalogue of training initiatives is in place, based on a networked approach. This offering stands out for being delivered on demand, the aim being to respond to existing professionals and new hirings in terms of their qualification needs to address new challenges and strategies.

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WE ARE HERE
TO HELP
**TELL US WHAT
YOU NEED!**

