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Foreign Agricultural Service

GAIN
Global Agricultural Information Network

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# **Report Name:** Exporter Guide Annual Portugal

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**Report Highlights:**

In 2025, Portugal imported almost $563 million worth of agricultural, fish, and forest products from the United States, which accounts for the highest level recorded. Outside the European Union Member States, the United States was the second main origin of Portugal's agricultural and related imports. Portugal is a net importer of agricultural and related products. In 2025 Portugal exceeded expectations by receiving 32.5 million foreign tourists, a three percent increase over the previous year. Looking to the future, Portugal's well-developed and export-oriented food and beverage industry and record-breaking tourist numbers are expected to continue to offer opportunities for certain consumer-oriented food products. This report provides guidance to U.S. companies interested in exporting consumer-ready food products to Portugal, including an overview of the country's economic situation, market structure, and export requirements.

## Market Fact Sheet: Portugal

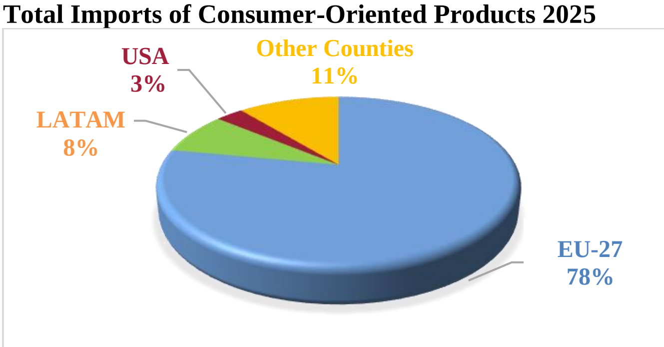
**Executive Summary**

Although a small country in size, Portugal has a diverse agricultural sector thanks to its varied climatic and topographic characteristics. Portugal produces mainly olives, being the world's sixth largest producer of olive oil, citrus, wine, and vegetables. Portugal is the top producer of cork in the world, produced for the domestic market and export. The country also has a significant seafood industry. In 2025, Portugal's total imports of agricultural and related products reached $20 billion, nearly flat on 2024. Around 47 percent of these imports originated from Spain, with strong contributions from Brazil and the United States.

**Consumer-Oriented Agricultural Imports**

Portugal is part of the European Union (EU) customs union and imported goods must meet EU sanitary and phytosanitary requirements. Hence, U.S. exporters already exporting to other EU member states will likely already meet most of Portuguese import requirements. For exports of animal products, the production plant must be approved for export to the EU.

**Total Imports of Consumer-Oriented Products 2025**




**Food Processing Industry**

In 2025, the Portuguese food-processing sector's contribution to the national economy, employment, and regional development continued to consolidate its position and importance as a key industrial sector. Portugal has a modern and innovative food-processing sector that pays special attention to the quality, safety, and traceability of the foodstuffs it produces. Hence, the Portuguese food industry offers attractive opportunities for U.S. exporters of food ingredients.

**Food Retail Industry**

The Portuguese retail market is highly diversified. The market is mainly dominated by two national groups, with Sonae and Jerónimo Martins as the leaders of the national retail sector, accounting for almost 50 percent of the retail market.

**Quick Facts CY2025**

**World Imports of Consumer-Oriented Products**

$12 billion

**Top 5 U.S. Growth Products**

1) Dog & Cat Food
2) Cod and fish fillets
3) Food Preparations
4) Condiments & Sauces
5) Pulses

**Food Processing Industry Facts 2025**

| | |
|---|---|
| Food Industry Output | $26.0 bn |
| Food Exports | $10.5 bn (2025) |
| Food Imports | $17 bn (2025) |
| No. of Employees | 113,658 |
| No. of Food Processors | 11,518 |
| % of industrial production | 12.9% (2021) |

**Top Country Retailers 2025 (% Surface)**

| | |
|---|---|
| 1) Sonae MC | 26.6% |
| 2) Grupo Jerónimo Martins | 21.7% |
| 3) Lidl Portugal | 13.0% |
| 4) Mercadona Portugal | 8.8% |
| 5) Auchan Portugal | 7% |
| 6) Aldi Portugal | 2.7% |

**GDP / Population 2025**

Population (est): 11.4 million
GDP (nominal, est): $307 trillion
GDP Per capita (nominal, est): $32,166

**Sources:** FIPA, Alimarket, TDM, GATS, IMF

**Strengths/Weaknesses/Opportunities/Challenges**

| SWOT ANALYSIS | |
|---|---|
| **Strengths** | **Weaknesses** |
| Growing manufacturing industry; increasingly developed infrastructure | High consumer price sensitivity |
| **Opportunities** | **Threats** |
| Growing food export sector; emphasis on health and sustainability | International trade disruptions; high inflation and public debt |

**Data and Information Sources:** Euromonitor, Eurostat, TDM LLC
**Contact:** AgLisbon@usda.gov

## Section 1: Market Overview

**Size of economy, purchasing power**

The Portuguese economy in 2026 is projected to experience continued, albeit slower, growth. Inflation is expected to moderate, and the unemployment rate is projected to remain relatively stable. While the government is focused on reducing public debt, there are also ongoing efforts to implement reforms aimed at boosting productivity and long-term growth.

In their latest World Economic Outlook report, the International Monetary Fund (IMF) forecasted Portugal's economy is expected to grow by at 1.9 percent for 2026. Nevertheless, the growth forecast for Portugal's economy is still above the average growth forecast for its peers in the Eurozone (1.4 percent in 2025 and 1.1 percent expected in 2026). Private consumption is set to benefit from a steady increase in employment and wages. In the external sector, imports are expected to continue overtaking exports.

The agri-food industry is an increasingly strategic sector for Portugal, given its contributions to the economy, employment, and regional development. The Portuguese agri-food and beverage industry is the manufacturing sector that contributes most to the national economy, both in terms of turnover and gross value added. The latest data available show that it also generates the most employment, as it is responsible for more than 240,000 direct jobs and around 500,000 indirect ones.

The agri-food sector is focused on strengthening its export markets, which are critical to the prosperity of the industry. Although the international economic situation remains challenging, the industry has been expanding into new markets. In 2025, Portugal's agri-food export value reached $14 billion, surpassing an initial industry target of $10 billion in exports. Based on the agri-food sector's resilience and ambition, the Portuguese food processing sector is expected to continue to offer good prospects for exporters of U.S. food ingredients and intermediate products.

In 2025, the tourism sector in Portugal experienced a golden year, exceeding expectations and setting new records. The number of foreign tourists hit 32.5 million – a three percent increase over the previous year- and the number of overnight stays reached 82.1 million – an increase of 2.2 percent, per data from Tourism Portugal[1]. In 2026, Portugal's tourism sector may shift toward moderate, sustainable growth after latest record breaks and over capacity.

In terms of population and demographic trends, Portugal's population rose to a record 11.4 million in 2025. According to the Institute National Statistics Portugal (INE), this is the highest ever figure since records began. This figure confirms that Portugal's population growth continues, due to an increase in foreign citizen migration. Despite this increase, Portugal has an ageing population, low birth rates and an increasing life expectancy. Correspondingly, the market will have to adapt, as businesses and service providers will need to be aware of which consumer segments to target, which products and services they will require, and how to best serve them accordingly. This will create opportunities for new formats and products targeting this increasing segment of the population.

1 Source: Tourism in Portugal. Overview 2025.

**Table 1. Advantages and Challenges Facing U.S. Exporters in Portugal**

| Advantages | Challenges |
|---|---|
| Good gateway to Europe and Portuguese speaking countries | Adjustments to the overall economy and political environment, and consumer habits. |
| Domestic distribution systems are efficient and modern | Increased consumer preference towards national food products following the COVID-19 pandemic |
| Diversity of food products in the market is increasing | High transportation costs: small exporters face difficulties in shipping mixed/smaller container loads versus EU competitors or big exporters. |
| Consumers are increasingly health conscious, demanding new products | Food imported from third countries, including the United States, must comply with EU food law, which varies considerably from U.S. regulation and practice |
| Portugal is a net importer of food and agricultural products | EU labeling, traceability, and packaging laws |
| U.S. food and agricultural products have a good reputation with importers and retailers. U.S. suppliers are known for being serious business partners. Consistency and reliability are highly appreciated | Lack of consumer awareness of U.S. brands, applicability, and varieties of U.S. products |

## Section 2: Exporter Business Tips

### Local Business Customs and Trends

Success in introducing new products in the Portuguese market depends on acquiring local representation and making personal contact. With the recent years' pandemic restrictions and gathering limitations, as well as the cancelation and postponement of trade shows and other large meetings, Portuguese companies have adapted and are increasingly willing to engage through online interactions. The advantages of local representation include market knowledge, up-to-date information and guidance on business practices and trade laws, sales contacts, and market development expertise. Good contacts are important for the exporter to be aware of future contracts and participate in tenders. Having a distributor that is appointed on an exclusive basis is ideal.

English is a widely spoken second language in Portugal, and U.S. exporters can expect to conduct their business meetings with contacts in English. Large importers and wholesalers have branch sales offices or sub-agents or dealers in the principal cities and towns, with main offices concentrated in Porto and Lisbon. Typically, food products are imported by an importer, broker, or distributor. Portugal has sales channels ranging from traditional distribution methods, whereby wholesalers sell to small retailers that sell to the public, to large multinational supermarkets and retail stores. However, personal relationships are still very important, especially within smaller organizations.

### Market Entry Strategies

All goods imported into the EU, including Portugal as a Member State, must comply with sanitary and phytosanitary standards designed to protect human an animal health.

Market entry strategies for U.S. products intending to enter the Portuguese market should include:

- Market research to assess product opportunities;
- Advanced calculations of the cost of introducing the product in the Portuguese market to prove its competitiveness in the local market;
- Identify an experienced distributor or independent reliable agent to advise on adequate distribution channels, import duties, sanitary regulations, and labeling requirements;
- Explore the purchasing arrangements of larger retail channels.

## Section 3: Import Food Standards and Regulations and Import Procedures

### Food Standards and Regulations

For detailed information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standards Country Report (FAIRS) for the EU and Portugal and the FAIRS Export Certificate Report for the EU and Portugal.

### General Import and Inspection Procedures

Portugal follows the Harmonized Nomenclature and Classification System (HS) and applies EU import duties according to a maximum and minimum rate schedule. The minimum tariff rate is applied to goods originating in countries entitled to the benefits of most-favored nation treatment; that is, members of the World Trade Organization (WTO), including the United States, and countries with which the EU has signed trade agreements. In some instances, negotiations and trade agreements in place between the EU and other countries provide for advantageous access to the European market.

Currently, the EU and the United States have the following agreements and arrangement in place:

- US-EU Organic Equivalency Arrangement
- US-EU Veterinary Equivalency Agreement

### Customs Clearance

The local importer has primary responsibility with the Portuguese Government for imported food products once they enter Portugal. It is recommended that U.S. exporters verify all import requirements with their Portuguese buyer. The buyer and local freight forwarder are in the best position to research such matters and assist with local authorities. The final authorization to import any product is subject to the Portuguese rules and regulations as interpreted by border officials at the time of product entry.

In general, for shipments of foodstuffs to Portugal, the following documents are required for ocean or air cargo shipments of food products into Portugal:

- Bill of Lading and/or Airway Bill
- Commercial Invoice
- Phytosanitary Certificate and/or Health Certificate, when applicable
- Import Certificate

**Country Language Labeling Requirements**
The standard U.S. label does not comply with EU's labeling requirements. Detailed information on labeling requirements that apply in the EU as of 2016, available in the GAIN USEU report on New EU Food Labeling Rules. This information can be supplemented by GAIN report How to Comply with EU's New Food Labeling Rules.

Please keep in mind that if the product you are exporting into Portugal does not comply with EU harmonized regulations, Portuguese customs or health authorities would not allow entry of the product.

## Section 4: Market Sector Structure and Trends

### Competitive Situation for U.S. Imported Goods

In 2025, Portugal imported $22 billion of agrifood products from the world, 78 percent of which originated in the EU. Within the EU, Spain is the main agrifood supplier, with 45 percent of total imports originating in the neighbor country. The U.S. is a major supplier of agricultural, fish products, with total agri-related imports from the U.S. nearing $413 million. Outside the European Union Member States, the United States was the second main origin of agricultural related imports.

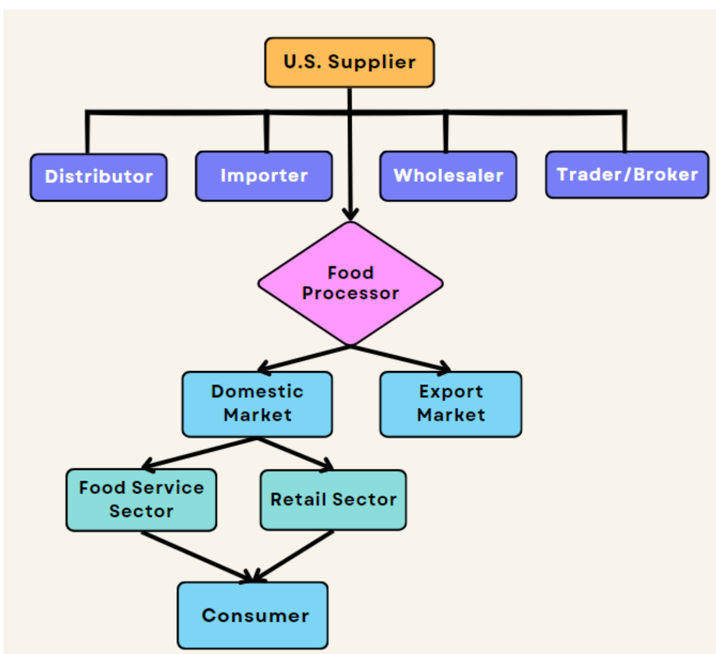
**Table 2. Best Consumer-Oriented Product Prospects Based on Growth Trends**

| Product Category (TMT; Million USD) | Major Supply Sources in 2024 (in value) | Strengths of Key Supply Countries | Advantages and Disadvantages of Local Suppliers |
|---|---|---|---|
| **Cod**<br>Value:<br>$164 | 1.Netherlands 22%<br>2.Sweden - 20%<br>3.Denmark - 18% | Other major suppliers offer high quality cod at competitive prices. | Large competition from local suppliers and producers. Portuguese domestic consumption and exports largely surpass local supply. |
| **Almonds**<br>Value: $40 | 1. Spain - 77%<br>2. Germany - 10%<br>3. Australia - 25%<br>4. U.S.A - 3% | Strong competition from Spain and Australia, second and third largest almond producers in the world. | Spain has a strong trade relationship with Portugal, due to its proximity. Spain imports almonds from the United States, which are consumed domestically and re-exported. |

| | | | |
|---|---|---|---|
| **Peanuts**<br>Value: $15 | 1. Argentina - 52%<br>2. USA - 15%<br>3. Netherlands - 10% | Strong competition from Argentina with high quality and competitive prices. | Portugal does not produce peanuts and relies on imports from other origins. |
| **Whiskies**<br>Value: $51 | 1.UK - 65%<br>2.Ireland -12%<br>7.U.S.A - 3.9% | Main competitors are other European countries. Difference in legal format of alcohol containers; exporters need to adapt to EU size. | Increasing interest in U.S. distilled drinks, mainly bourbon. |
| **Pulses**<br>Value: $107 | 1. Canada - 24%<br>2. Argentina - 18%<br>3. Brazil - 17% | Strong competition from Canada who largely increased their presence in recent years, as well as Argentina and Brazil | Portugal is a traditional consumer of pulses, and its local production is insufficient to fulfill internal demand. |
| **Pistachios**<br>Value: $14 | 1. Spain - 50%<br>2. Netherlands - 28%<br>3. U.S.A. - 14% | Spain and the Netherlands are the main entry points for domestic, U.S. and Iranian pistachios to Portugal. | Pistachio production is an emerging agricultural sector in Portugal as demand keeps growing. |

Source: Trade Data Monitor, LLC

**Market Structure**



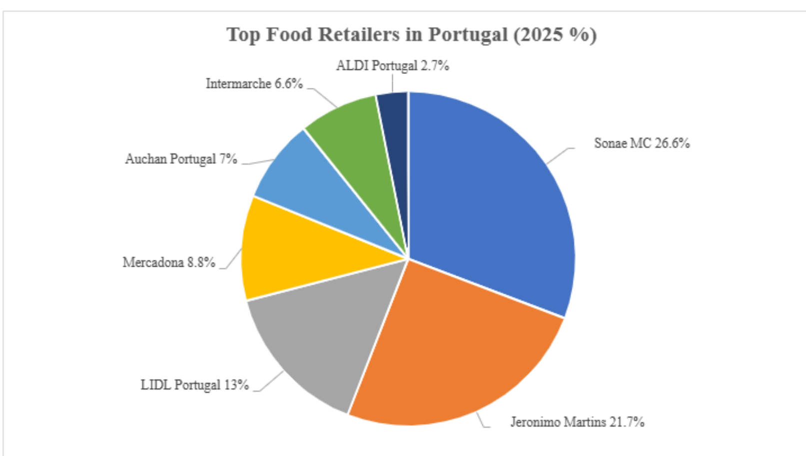
**Food Retail Sector**

According to Euromonitor, retail in Portugal experienced a modest growth in 2025, despite the overall challenging economic environment, primarily driven by the results of the online channel and grocery retailers. Private labels benefit from consumers' reduced spending power, as private labels gained popularity as they are perceived to offer good quality for reasonable prices. In addition, budget-conscious consumers are shopping more frequently for smaller baskets of goods, to better manage their weekly spending. Within this landscape, communications and promotional strategies are increasingly focused on discounts and cost-saving strategies.

Supermarkets are benefitting from a series of factors, including extended private label ranges to take care of price-sensitive consumers and compete against discounters, as well as the fact that supermarkets tend to offer proximity convenience to consumers, with a wider range of products than seen in convenience stores. In that regard, supermarkets tend to offer a mix of the benefits of hypermarkets and convenience stores, making them able to cannibalize shares from both. The availability of discounts and loyalty programs are another attractive factor that supermarkets are monetizing.

With the increased competition in the supermarket sector, Portuguese consumers have seen an increase in options for making their food purchases. The Portuguese food retail market is highly concentrated, Continente Modelo (Sonae MC), and Pingo Doce (Jerónimo Martins) continue to lead the supermarket sector. Competition is more intense between the third and fourth place, including with strong performance from discounters like Lidl. In 2025, according to reports, the German discounter Lidl and the Spanish chain Mercadona have aggressively expanded their footprint in Portugal. This situation in the supermarket sector stimulated competition, and the Portuguese consumers have seen an increase in options for making their food purchases. Retailers are focusing on expanding their store networks and digital presence to maintain growth in a competitive environment.

Players are expected to continue investing in promotional campaigns and private label ranges to increase sales. Supermarkets are expected to benefit from proximity convenience and wide offers of products. As purchasing power increases, the importance of private labels will reduce, and players with a wider offering of brands will regain share.




Source: Alimarket

For more information on the Portuguese retail sector, visit [FAS GAIN Home.](#)

**Hotel, Restaurant, and Institutional (HRI) Sector**

The HRI sector in Portugal is a robust and growing industry and highly diversified. It includes full-service restaurants, quick service restaurants, bars, hotels, contract caterers, and institutional services. According to Euromonitor, full-service restaurants saw value sales fall in Portugal in 2025. The increases in the cost of living and the strong rise in consumer food service prices overall negatively impacted results and not even the positive trend in tourism was able to prevent the observed decline in sales. With the continued increase in operating costs, it is becoming more difficult for full-service restaurants, particularly independent ones, to maintain their financial viability. However, more recent data from 2025 indicates a potential recovery in value growth, though challenges remain.

On the other hand, limited-service restaurants saw continued strong growth in value in 2025. The performance was boosted by the expansion of the offer and with consumers adjusting their consumption habits as they looked for the best value-for-money deals. Nonetheless, the traditional low-cost model is gradually disappearing, with many limited-service restaurants investing in premium offers as well as expanding the vegetarian or even high-end meals. Although there is a trend towards rising health awareness, most of the population remains fast food friendly.

The HRI sector is highly connected with tourism. Portugal's tourism industry data reflects an extraordinary recovery, and in 2025, the tourism sector in Portugal hit a new record with 32.5 million visitors and the number of overnight stays reached 82.1 million – another record. In 2026, this good performance is expected to be maintained, and Portugal is expected to see yet another record number of tourists.

For more information on the Portuguese HRI sector, visit [FAS GAIN Home.](#)

**Food Processing Sector**

The agri-food industry is increasingly a strategic sector for Portugal, given its contributions to the economy, employment, and regional development. The food and beverage industry is the manufacturing sector that contributes most to the national economy, both in terms of turnover and gross value added. It also generates the most employment, as it is responsible for more than 240,000 direct jobs and around 500,000 indirect ones.

The agri-food sector is focused on strengthening its export markets, which are critical to the prosperity of the industry. Although the international economic situation remains challenging, the industry has been expanding into new markets. Portugal's agri-food and food processing sector exports surpassed $11 billion in exports. Driven by a strategic push toward high-value, gourmet and premium goods, the industry targets international markets with a core focus on some Member States, Spain, France and Italy. Based on the agri-food sector's resilience and ambition, the Portuguese food processing sector will continue to offer good prospects for exporters of U.S. food ingredients.

For more information on the Portuguese food processing sector, visit [FAS GAIN Home.](#)

**Table 2. Agricultural and Food Imports Statistics**

| AGRICULTURAL PRODUCTS IMPORTS | 2022 | 2023 | 2024 | 2025 | 2026* |
|---|---|---|---|---|---|
| **Total Agricultural and Related Products** | **18,141** | **19,523** | **19,767** | **22,372** | **7,623** |
| Total U.S. Agricultural and Related Products | 289 | 295 | 415 | 563 | 152 |
| **Total Agricultural Related Products** | **4,147** | **4,087** | **4,176** | **4,759** | **1,612** |
| Total U.S. Agricultural Related Products | 57 | 54 | 55 | 76 | 26 |
| **Total Consumer-Oriented Products** | **8,264** | **9,773** | **10,328** | **12,097** | **4,050** |
| Total U.S. Consumer-Oriented Products | 21 | 22 | 19 | 20 | 5 |
| **Total Fish Products** | **2,695** | **2,748** | **2,893** | **3,332** | **1,091** |
| Total U.S. Fish Products | 17 | 16 | 16 | 19 | 8 |

Source: Trade Data Monitor LLC; Unit: $ Million (*) Estimate

**Best High-Value, Consumer-Oriented Product Prospects Category**

*Products Present in the Market with Good Sales Potential*
Tree nuts, particularly almonds, walnuts, and pistachios -- Peanuts -- Pulses -- Sunflower seeds -- Fish and Seafood (frozen) -- Surimi -- Spirits

*Products Not Present in Significant Quantities with Good Sales Potential*
Functional and innovative health food -- Free-from products (lactose-free, gluten-free) -- Specialty and snack foods -- Sweet potatoes -- Pet foods

*Products Not Present Because They Face Significant Barriers*
Red meat and meat preparations (hormone ban) -- Poultry (sanitary procedures - chlorine wash) -- Processed food (with GMO ingredients)

## Section 6: Key Contacts and Further Information

If you have any questions, please contact the Office of Agricultural Affairs at AgLisbon@usda.gov. For more information on exporting U.S. agricultural products, the FAS website offers recent reports of interest to U.S. exporters interested in the Portuguese market. Additionally, useful contacts are listed below:

**Portuguese Trade Associations**
FIPA - Federação das Indústrias Portuguesas Agro-Alimentares (Portuguese Federation of Agri-Food Industries);
ACOPE – Associação Dos Comerciantes de Pescado (Portuguese Seafood Traders Association);
ANCIP – Associação Nacional de Industriais de Conservas de Peixe (Portuguese National Association of Canned Fish Manufacturers);
AHRESP – Associação da Hotelaria, Restauração e Similares de Portugal (Portuguese Hotel and Restaurant Association)

**Portuguese Government Agencies**
Direção-Geral de Agricultura e Desenvolvimento Rural (Directorate General of Agricultura and Rural Development);
Autoridade de Segurança Alimentar e Económica (Economic and Food Safety Agency);

Direção-Geral de Alimentação e Veterinária; (Directorate-General of Food and Veterinary Medicine)

**Attachments:**

No Attachments.