



Baked Goods in Spain

November 2025

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Baked Goods in Spain - Category analysis

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2025 DEVELOPMENTS

Growing demand for convenient frozen bakery products and tortillas

INDUSTRY PERFORMANCE

Snacking, tourism and convenience drive growth in baked goods in 2025

Frozen baked goods and tortillas gain momentum through convenience and innovation

WHAT'S NEXT?

Falling volume sales forecast for baked goods will prompt investment in smaller formats

Health trends continue to inform innovation

Sustainability concerns remain relevant

COMPETITIVE LANDSCAPE

Vicky Foods leads with Mercadona hot on its heels

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Staple Foods in Spain - Industry Overview

EXECUTIVE SUMMARY

Maturity counterbalanced by population growth and rise in tourism

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INDUSTRY PERFORMANCE

Tourism recovery and premiumisation support value growth amid cost pressures

Frozen fruit leads growth as convenience and versatility drive demand

Natural ingredients and high-protein innovation shape product development

WHAT'S NEXT?

Health focus and flexitarian diets to influence future consumption patterns

Convenience, cultural diversity and targeted innovation will drive growth

Private label leadership and omnichannel expansion to shape future retail dynamics

COMPETITIVE LANDSCAPE

Mercadona leads through private label Hacendado

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