



Consumer Foodservice in Spain

March 2026

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EXECUTIVE SUMMARY

Easing inflation, tourism and digital innovation support growth in consumer foodservice in 2025

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INDUSTRY PERFORMANCE

Stabilising inflation, strong tourism and economic recovery support growth in 2025
Digital platforms and loyalty integration accelerate the expansion of delivery in Spain
Experiential formats and event-based dining strengthen consumer engagement

WHAT'S NEXT?

Tourism, easing inflation and rising mobility are set to support foodservice growth in Spain
Health and functional nutrition are expected to reshape menu strategies
Sustainability strategies will be transforming operations and menu development

COMPETITIVE LANDSCAPE

Leading global chains strengthen positions through expansion, digitalisation and convenience-led formats
Experiential dining drives dynamic growth for Hard Rock Café in Spain
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INDUSTRY PERFORMANCE

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Rising consumer demand for specialty beverages drives growth in Spain's cafés and bars
Delivery and drive-through formats drive growth and convenience in Spain's cafés and bars

WHAT'S NEXT?

Economic growth and tourism are set to support value sales in Spain's cafés/bars
Health and wellness trends are set to drive menu innovation in Spain's cafés/bars
Sustainability and customisation are set to drive innovation in Spain's cafés and bars

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INDUSTRY PERFORMANCE

Tourism supports growth in Spain's full-service restaurants despite ongoing cost pressures
Digital engagement and tailored offerings strengthen customer retention in full-service restaurants
Full-service restaurants increasingly embrace delivery to counter economic pressures

WHAT'S NEXT?

Tourism and evolving tastes are set to drive value growth in Spain's full-service restaurants
Digitalisation and AI adoption are set to drive foodservice value growth
Sustainability initiatives will strengthen competitiveness in Spain's full-service restaurants

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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Online food delivery sustains growth in 2025 despite regulatory and market pressures

WHAT'S NEXT?

Digital engagement and local sourcing will strengthen competition in limited-service restaurants

Online delivery is expected to surpass takeaway in value growth over the forecast period

Plant-based innovation is expected to influence menus in limited-service restaurants

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Convenience and retail integration drive growth in Spain's self-service cafeterias

Strategic transport hub locations propel growth of chained self-service cafeterias

Loyalty programmes and value pricing drive consumer engagement in self-service cafeterias

WHAT'S NEXT?

Tourism and public transport initiatives are expected to drive growth in self-service cafeterias

Click-and-collect will enhance convenience, but in-store dining will remain dominant

As consumers demand healthier options, menus are set to adapt accordingly

COMPETITIVE LANDSCAPE

Ikea Food - IKEA España AB suc en España increases its share while implementing new consumer experiences

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Festivals and tradition drive growth for street stalls/kiosks in Spain

Independent street stalls/kiosks lead as consumers appreciate authentic experiences

Low costs and diverse offerings drive growth in Spain's street stalls/kiosks

WHAT'S NEXT?

Growth is expected to be driven by largescale events across Spain
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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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Tourism and experiential pop-ups drive growth in standalone foodservice locations
Digital delivery and online ordering enhance reach and efficiency in foodservice outlets

WHAT'S NEXT?

Retail-based foodservice is set to lead growth, supported by economic recovery
Favourable climate and tourism is set to support growth in standalone foodservice locations
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COMPETITIVE LANDSCAPE

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