



Staple Foods in Spain

November 2025

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Staple Foods in Spain

EXECUTIVE SUMMARY

Maturity counterbalanced by population growth and rise in tourism

KEY DATA FINDINGS

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

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Proximity formats and discounters strengthen competition in retail

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Baked Goods in Spain

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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

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[Breakfast Cereals in Spain](#)

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INDUSTRY PERFORMANCE

Health trends, tourism and product innovation shape performance of breakfast cereals in Spain

Health and versatility drive growth in hot cereals, muesli and granola

WHAT'S NEXT?

Maturity means stagnant volume growth for breakfast cereals

Functional innovation targets gut health and protein demand

Digital-first strategies help smaller players build brand loyalty

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Kellogg leads amid intensifying competition from private label

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[Processed Fruit and Vegetables in Spain](#)

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Frozen innovation and convenience drive growth in processed fruit and vegetables
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WHAT'S NEXT?

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Health-conscious innovation targets family and child-friendly consumption
Operational efficiency and sustainability investments enhance competitiveness

COMPETITIVE LANDSCAPE

Private label dominates with Mercadona ahead of the rest
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[Processed Meat, Seafood and Alternatives To Meat in Spain](#)

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Consumers seeking convenient, high quality and natural products

INDUSTRY PERFORMANCE

Premiumisation, health focus and convenience support growth in 2025

Meat and seafood substitutes drives overall category expansion

WHAT'S NEXT?

Premiumisation and evolving flexitarian habits sustain future growth potential

High-protein launches and food tech investment to drive product development

Labelling debate underscores tensions between meat and plant-based sectors

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[Rice, Pasta and Noodles in Spain](#)

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Population growth and rising tourist demand boost sales

INDUSTRY PERFORMANCE

Convenience and affordability drive moderate growth in pasta consumption

Global flavours and ready-to-eat formats boost rice and noodle innovation

WHAT'S NEXT?

Population growth, tourism and premium convenience support future demand

Rising awareness and private label expansion to boost gluten-free pasta segment

AI adoption enhances efficiency across production and supply chains as rice producers focus on sustainability

COMPETITIVE LANDSCAPE

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Gallina Blanca benefits from stronghold in instant noodles

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