



Processed Fruit and Vegetables in Spain

November 2025

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Processed Fruit and Vegetables in Spain - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy and convenient products popular in frozen processed fruit and vegetables

INDUSTRY PERFORMANCE

Frozen innovation and convenience drive growth in processed fruit and vegetables

Frozen potatoes and fruit rise through innovation and versatility

WHAT'S NEXT?

Premiumisation and frozen innovation should sustain long-term category growth

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

Players invest in premium sourcing

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Supermarkets continues to dominate distribution in 2025

Costco's expansion pushes growth in warehouse clubs channel

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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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