



# Rice, Pasta and Noodles in Spain

November 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

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

Private label goes from strength to strength

Gallina Blanca benefits from stronghold in instant noodles

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Supermarkets dominates thanks to proximity and convenience

Major retailers invest in omnichannel approach

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## Staple Foods in Spain - Industry Overview

### 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

Mercadona leads through private label Hacendado

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