



Rice, Pasta and Noodles in Spain

November 2025

Table of Contents

Rice, Pasta and Noodles in Spain - Category analysis

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

CHANNELS

Supermarkets dominates thanks to proximity and convenience

Major retailers invest in omnichannel approach

CATEGORY DATA

Table 1 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 2 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 3 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 4 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 5 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 6 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 7 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 8 - NBO Company Shares of Rice: % Value 2021-2025

Table 9 - LBN Brand Shares of Rice: % Value 2022-2025

Table 10 - NBO Company Shares of Pasta: % Value 2021-2025

Table 11 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 12 - NBO Company Shares of Noodles: % Value 2021-2025

Table 13 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 14 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 15 - Distribution of Rice by Format: % Value 2020-2025

Table 16 - Distribution of Pasta by Format: % Value 2020-2025

Table 17 - Distribution of Noodles by Format: % Value 2020-2025

Table 18 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 19 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 20 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 21 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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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
La Cuerva sees rapid growth in frozen fruit

CHANNELS

Proximity formats and discounters strengthen competition in retail
E-commerce and quick commerce expand as consumers embrace hybrid shopping

MARKET DATA

Table 22 - Sales of Staple Foods by Category: Volume 2020-2025
Table 23 - Sales of Staple Foods by Category: Value 2020-2025
Table 24 - Sales of Staple Foods by Category: % Volume Growth 2020-2025
Table 25 - Sales of Staple Foods by Category: % Value Growth 2020-2025
Table 26 - NBO Company Shares of Staple Foods: % Value 2021-2025
Table 27 - LBN Brand Shares of Staple Foods: % Value 2022-2025
Table 28 - Penetration of Private Label by Category: % Value 2020-2025
Table 29 - Distribution of Staple Foods by Format: % Value 2020-2025
Table 30 - Forecast Sales of Staple Foods by Category: Volume 2025-2030
Table 31 - Forecast Sales of Staple Foods by Category: Value 2025-2030
Table 32 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
Table 33 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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