

Cooking Ingredients and Meals in Spain

November 2025

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EXECUTIVE SUMMARY

Consumers seeking convenience and quality

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience and changing lifestyles fuel growth in ready meals and soups
Health-conscious innovation and natural ingredients shape product development
Tourism and global influences boost demand for international flavours

WHAT'S NEXT?

Convenience, health and stable prices underpin positive outlook for cooking ingredients and meals in Spain Evolving lifestyles and affordability to sustain demand for ready meals

Health awareness and regulatory changes will drive innovation and trust

COMPETITIVE LANDSCAPE

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CHANNELS

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Sunflower oil shines thanks to affordable prices

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WHAT'S NEXT?

Stabilising prices and new regulations support long-term market balance

Health-driven innovation set to enhance value proposition of olive oil

New regulation should strengthen transparency and quality standards in vegetable oils

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

Busier and smaller households drives demand for convenience

INDUSTRY PERFORMANCE

Global flavours and chilled innovation drive growth in meals and soups

Meal kits sustains growth despite market consolidation and rising retail competition

WHAT'S NEXT?

Chilled innovation and tourism ensure steady growth in meals and soups

Health-focused innovation and clean labels set to reshape product development

Sustainability and decarbonisation initiatives should strengthen category resilience

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Spicy flavours and foodservice expansion underpin future growth Health positioning evolves towards functional and nutrient-enriched sauces Sustainability and local sourcing to drive progress in sauces production

COMPETITIVE LANDSCAPE

Mercadona maintains overall leadership as Unilever and Heinz lose out to private label Shukran rises thanks to activity in dips and ethnic focus

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Premiumisation and shifting consumption habits drive value growth in sweet spreads High-protein and indulgent innovations boost nut and seed based spreads

WHAT'S NEXT?

Premiumisation to offset volume decline as brands target older demographics

Plant-based innovation gains traction as consumers seek healthier indulgence

New honey labelling rules aim to enhance transparency and protect local producers

COMPETITIVE LANDSCAPE

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