

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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WHAT'S NEXT?

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Sustainability concerns remain relevant

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Health trends, tourism and product innovation shape performance of breakfast cereals in Spain Health and versatility drive growth in hot cereals, muesli and granola

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Maturity means stagnant volume growth for breakfast cereals

Functional innovation targets gut health and protein demand

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Population growth, tourism and premium convenience support future demand

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

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

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Gallina Blanca benefits from stronghold in instant noodles

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