



# Processed Meat, Seafood and Alternatives To Meat in Spain

November 2025

## Processed Meat, Seafood and Alternatives To Meat in Spain - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Consumers seeking convenient, high quality and natural products

#### INDUSTRY PERFORMANCE

Premiumisation, health focus and convenience support growth in 2025

Meat and seafood substitutes drives overall category expansion

#### WHAT'S NEXT?

Premiumisation and evolving flexitarian habits sustain future growth potential

High-protein launches and food tech investment to drive product development

Labelling debate underscores tensions between meat and plant-based sectors

#### COMPETITIVE LANDSCAPE

Mercadona leads amid broader private label expansion

Plant-based innovation shapes competitive dynamics

#### CHANNELS

Supermarkets leads though struggles to maintain share

E-commerce posts fastest rise, stealing share from supermarkets in 2025

#### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

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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

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Summary 1 - Research Sources

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