

# Cooking Ingredients and Meals in Spain

November 2023

Table of Contents

## Cooking Ingredients and Meals in Spain

### EXECUTIVE SUMMARY

Cooking ingredients and meals in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for cooking ingredients and meals?

### MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2018-2023

Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2018-2023

Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2018-2023

Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2019-2023

Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Cooking Ingredients and Meals by Format: % Value 2018-2023

Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2023-2028

Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2023-2028

Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Edible Oils in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Poor olive harvest places further pressure on olive oil producers in Spain

Sunflower oil sees improved fortunes as supply chain concerns subside

Private label still dominates despite losing share in 2023

### PROSPECTS AND OPPORTUNITIES

Olive oil set to drive a recovery in demand with spray format packaging gaining the interest of consumers

Sustainability set to play a central role in terms of company strategies

Retailers could introduce a wider range of other edible oils

### CATEGORY DATA

Table 13 - Sales of Edible Oils by Category: Volume 2018-2023

Table 14 - Sales of Edible Oils by Category: Value 2018-2023

Table 15 - Sales of Edible Oils by Category: % Volume Growth 2018-2023

Table 16 - Sales of Edible Oils by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Edible Oils: % Value 2019-2023

Table 18 - LBN Brand Shares of Edible Oils: % Value 2020-2023

Table 19 - Distribution of Edible Oils by Format: % Value 2018-2023

Table 20 - Forecast Sales of Edible Oils by Category: Volume 2023-2028

Table 21 - Forecast Sales of Edible Oils by Category: Value 2023-2028

Table 22 - Forecast Sales of Edible Oils by Category: % Volume Growth 2023-2028

Table 23 - Forecast Sales of Edible Oils by Category: % Value Growth 2023-2028

## Meals and Soups in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Ready meals thriving in 2023 with players continuing to expand their offerings

Consumers favour chilled soup thanks to its healthier and fresher image

Meal kits and prepared salads tapping into the desire for healthy, tasty and convenient meal options

#### PROSPECTS AND OPPORTUNITIES

Ready meals serving up dishes to meet the demands of different consumers

Prepared salads likely to remain a popular choice of health-conscious shoppers

Sustainability a pressing concern for consumers, manufacturers and retailers

#### CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2018-2023

Table 25 - Sales of Meals and Soups by Category: Value 2018-2023

Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2018-2023

Table 27 - Sales of Meals and Soups by Category: % Value Growth 2018-2023

Table 28 - Sales of Chilled Ready Meals by Ethnicity: % Value 2018-2023

Table 29 - Sales of Frozen Ready Meals by Ethnicity: % Value 2018-2023

Table 30 - Sales of Soup by Leading Flavours: Rankings 2018-2023

Table 31 - NBO Company Shares of Meals and Soups: % Value 2019-2023

Table 32 - LBN Brand Shares of Meals and Soups: % Value 2020-2023

Table 33 - Distribution of Meals and Soups by Format: % Value 2018-2023

Table 34 - Forecast Sales of Meals and Soups by Category: Volume 2023-2028

Table 35 - Forecast Sales of Meals and Soups by Category: Value 2023-2028

Table 36 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2023-2028

Table 37 - Forecast Sales of Meals and Soups by Category: % Value Growth 2023-2028

## Sauces, Dips and Condiments in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Chilled pasta sauces proving popular while cooking ingredients and condiments suffers from the consumer desire for convenience

Herbs and spices receives growing interest from a younger audience

Cooking and table sauces benefiting from investment in new product development

#### PROSPECTS AND OPPORTUNITIES

New product development could help breathe new life into cooking and table sauces

Dips set to benefit from healthy image and new flavour and recipe innovations

Consumers expected to show a growing interest in world cuisine

#### CATEGORY DATA

Table 38 - Sales of Sauces, Dips and Condiments by Category: Volume 2018-2023

Table 39 - Sales of Sauces, Dips and Condiments by Category: Value 2018-2023

Table 40 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2018-2023

Table 41 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2018-2023

Table 42 - Sales of Liquid Recipe Sauces by Type: % Value 2018-2023

Table 43 - Sales of Other Sauces and Condiments by Type: Rankings 2018-2023

Table 44 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2019-2023

Table 45 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2020-2023

Table 46 - Distribution of Sauces, Dips and Condiments by Format: % Value 2018-2023

Table 47 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2023-2028

Table 48 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2023-2028

Table 49 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2023-2028

Table 50 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2023-2028

## Sweet Spreads in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

A tough year for sweet spreads as an unhealthy image and economic pressures impact sales

Nocilla and Nutella continue to dominate chocolate spreads despite mounting pressure from private label

Nut and seed based spreads benefiting from perceptions of being a healthy indulgence

#### PROSPECTS AND OPPORTUNITIES

Healthy eating trend likely to become a growing influence on sales of sweet spreads

Despite positive growth projections jams and preserves likely to retain limited appeal among Spaniards

Sustainability a growing concern for consumers and manufacturers

#### CATEGORY DATA

Table 51 - Sales of Sweet Spreads by Category: Volume 2018-2023

Table 52 - Sales of Sweet Spreads by Category: Value 2018-2023

Table 53 - Sales of Sweet Spreads by Category: % Volume Growth 2018-2023

Table 54 - Sales of Sweet Spreads by Category: % Value Growth 2018-2023

Table 55 - Sales of Jams and Preserves by Leading Flavours: Rankings 2018-2023

Table 56 - NBO Company Shares of Sweet Spreads: % Value 2019-2023

Table 57 - LBN Brand Shares of Sweet Spreads: % Value 2020-2023

Table 58 - Distribution of Sweet Spreads by Format: % Value 2018-2023

Table 59 - Forecast Sales of Sweet Spreads by Category: Volume 2023-2028

Table 60 - Forecast Sales of Sweet Spreads by Category: Value 2023-2028

Table 61 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2023-2028

Table 62 - Forecast Sales of Sweet Spreads by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/cooking-ingredients-and-meals-in-spain/report](https://www.euromonitor.com/cooking-ingredients-and-meals-in-spain/report).