



# Staple Foods in Spain

November 2023

Table of Contents

## Staple Foods in Spain

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

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

Table 8 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baked Goods in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales stabilise in 2023 after a difficult couple of years

Mondelez moves into packaged cakes and pastries while sustainability concerns come to the fore

E-commerce and discounters continue to gain share as consumer shopping habits change

#### PROSPECTS AND OPPORTUNITIES

Healthy eating trend expected to inform demand for baked goods

Packaging innovation expected to be a key focus of new product development in baked goods

Players look to marry healthy options with the demand for indulgence and convenience

### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023

Table 14 - Sales of Baked Goods by Category: Value 2018-2023

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 - Sales of Pastries by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 19 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

## Breakfast Cereals in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price competition heating up in breakfast cereals as household budgets are squeezed

Oats proving to be a popular choice among health conscious consumers

Healthy indulgence could be key to success as Nestlé rolls out new options

#### PROSPECTS AND OPPORTUNITIES

Muesli and granola set for strong growth as young consumers look for healthy options with an indulgent twist

Unhealthy image of children's breakfast cereals could limit growth opportunities

Sustainability a pressing concern for consumers and producers of breakfast cereals

#### CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

## Processed Fruit and Vegetables in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Shelf stable beans remain popular in 2023 thanks to healthy and affordable image

Frozen products winning over consumers despite disappointing harvests

Players focus on quality to win share in shelf stable tomatoes

#### PROSPECTS AND OPPORTUNITIES

Convenient and ready-to-eat options could find favour over the forecast period

Manufacturers expected to look for renewable energy sources to meet sustainability targets and to save money

Frozen fruit set for bright future

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

## Processed Meat, Seafood and Alternatives To Meat in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

A small improvement in sales in 2023 but inflation continues to weigh on demand

Meat and seafood substitutes remains on an upward trajectory thanks to investment in new product development and innovation

Brand players focus on offering more competitive pricing and healthier options to fend off private label

#### PROSPECTS AND OPPORTUNITIES

Competition set to remain fierce as Nueva Pescanova's sale is put on hold

Meat and seafood substitutes set to benefit from growing product variety and more consumption occasions

Premium quality options could find favour over the forecast period

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Rice, Pasta and Noodles in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Spanish government reduces VAT on rice and pasta in response to rising food prices

Chilled pasta successfully tapping into the demand for quality and convenient meal options

Rollin' Gallo forks turn back time to win back consumers

#### PROSPECTS AND OPPORTUNITIES

Rice likely to remain an important staple but category maturity could restrict volume growth

Health, sustainability and a focus on premium quality set to inform new product development in pasta

Instant noodles likely to continue benefiting from the convenience they offer but players may need to offer healthier options to reach more consumers

#### CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023  
Table 69 - NBO Company Shares of Rice: % Value 2019-2023  
Table 70 - LBN Brand Shares of Rice: % Value 2020-2023  
Table 71 - NBO Company Shares of Pasta: % Value 2019-2023  
Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023  
Table 73 - NBO Company Shares of Noodles: % Value 2019-2023  
Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023  
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023  
Table 76 - Distribution of Rice by Format: % Value 2018-2023  
Table 77 - Distribution of Pasta by Format: % Value 2018-2023  
Table 78 - Distribution of Noodles by Format: % Value 2018-2023  
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028  
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028  
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028  
Table 82 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-spain/report](http://www.euromonitor.com/staple-foods-in-spain/report).