



**Euromonitor
International**

Consumer Foodservice By Location in Spain

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic strength and tourism drive growth across consumer foodservice in 2025

INDUSTRY PERFORMANCE

- Economic performance and experiential retail dining drive growth in non-standalone foodservice locations
- Tourism and experiential pop-ups drive growth in standalone foodservice locations
- Digital delivery and online ordering enhance reach and efficiency in foodservice outlets

WHAT'S NEXT?

- Retail-based foodservice is set to lead growth, supported by economic recovery
- Favourable climate and tourism is set to support growth in standalone foodservice locations
- Rising incomes support growth for leisure despite structural challenges

COMPETITIVE LANDSCAPE

- Expansion and drive-through formats reinforce leadership in non-standalone locations
- Authenticity and cultural connection drive growth for independent standalone foodservice outlets

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Consumer Foodservice in Spain - Industry Overview

EXECUTIVE SUMMARY

Easing inflation, tourism and digital innovation support growth in consumer foodservice in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Stabilising inflation, strong tourism and economic recovery support growth in 2025

Digital platforms and loyalty integration accelerate the expansion of delivery in Spain

Experiential formats and event-based dining strengthen consumer engagement

WHAT'S NEXT?

Tourism, easing inflation and rising mobility are set to support foodservice growth in Spain

Health and functional nutrition are expected to reshape menu strategies

Sustainability strategies will be transforming operations and menu development

COMPETITIVE LANDSCAPE

Leading global chains strengthen positions through expansion, digitalisation and convenience-led formats

Experiential dining drives dynamic growth for Hard Rock Café in Spain

Network expansion and flagship investments reinforce Starbucks' leadership in specialist coffee shops

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Independent operators lead through authenticity but face competition from well-resourced chains

Digital platforms and loyalty programmes drive consumer engagement and operational efficiency

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