



Rice, Pasta and Noodles in Spain

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Population growth and rising tourist demand boost sales

INDUSTRY PERFORMANCE

Convenience and affordability drive moderate growth in pasta consumption

Global flavours and ready-to-eat formats boost rice and noodle innovation

WHAT'S NEXT?

Population growth, tourism and premium convenience support future demand

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

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

COMPETITIVE LANDSCAPE

Private label goes from strength to strength

Gallina Blanca benefits from stronghold in instant noodles

CHANNELS

Supermarkets dominates thanks to proximity and convenience

Major retailers invest in omnichannel approach

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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

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