



Pulses in Spain

January 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Packaging expectations reshape pulses as climate risks intensify

INDUSTRY PERFORMANCE

Pulses remains resilient despite climate challenges, with heightened consumer focus on sustainable packaging

Private label continues to benefit from widespread cost consciousness among local consumers, intensifying competition with named brands

WHAT'S NEXT?

High-protein profile ensures further growth for pulses in Spain, though convenience demand will accelerate shift towards processed alternatives

Tech advances to streamline production processes, while retail shifts are likely to favour discounters and e-commerce

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Fresh food volumes struggle as drought and convenience pressures intensify

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Fresh food turns in marginal volume growth thanks partly to price hikes

Challenges persist in form of droughts and processed alternatives

WHAT'S NEXT?

Fresh foods to see only marginal rises in volume sales

Sugar will fall fastest, while tourism helps to sustain foodservice sales

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