



Cooking Ingredients and Meals in Spain

November 2025

Table of Contents

Cooking Ingredients and Meals in Spain

EXECUTIVE SUMMARY

Consumers seeking convenience and quality

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience and changing lifestyles fuel growth in ready meals and soups
Health-conscious innovation and natural ingredients shape product development
Tourism and global influences boost demand for international flavours

WHAT'S NEXT?

Convenience, health and stable prices underpin positive outlook for cooking ingredients and meals in Spain
Evolving lifestyles and affordability to sustain demand for ready meals
Health awareness and regulatory changes will drive innovation and trust

COMPETITIVE LANDSCAPE

Mercadona leads as Deoleo invests in innovation and sustainability
HelloFresh and Andro enjoy rapid expansion in 2025

CHANNELS

Supermarkets strengthens dominance through adaptation and digital innovation
E-commerce and quick commerce accelerate as convenience expectations rise

MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2020-2025
Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2020-2025
Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2020-2025
Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2020-2025
Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2021-2025
Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2022-2025
Table 7 - Penetration of Private Label by Category: % Value 2020-2025
Table 8 - Distribution of Cooking Ingredients and Meals by Format: % Value 2020-2025
Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2025-2030
Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2025-2030
Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2025-2030
Table 12 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sunflower oil shines thanks to affordable prices

INDUSTRY PERFORMANCE

Falling olive oil prices drive volume recovery but reduce value sales
Sunflower oil maintains momentum as affordable cooking staple

WHAT'S NEXT?

Stabilising prices and new regulations support long-term market balance
Health-driven innovation set to enhance value proposition of olive oil
New regulation should strengthen transparency and quality standards in vegetable oils

COMPETITIVE LANDSCAPE

Mercadona and Deleo maintain overall leadership in 2025
Mueloliva and Aceites Abril post solid growth

CHANNELS

Supermarkets continues to dominate, benefiting from convenience
Retail e-commerce sees further expansion as retailers focus on improving infrastructure

CATEGORY DATA

Table 13 - Sales of Edible Oils by Category: Volume 2020-2025
Table 14 - Sales of Edible Oils by Category: Value 2020-2025
Table 15 - Sales of Edible Oils by Category: % Volume Growth 2020-2025
Table 16 - Sales of Edible Oils by Category: % Value Growth 2020-2025
Table 17 - NBO Company Shares of Edible Oils: % Value 2021-2025
Table 18 - LBN Brand Shares of Edible Oils: % Value 2022-2025
Table 19 - Distribution of Edible Oils by Format: % Value 2020-2025
Table 20 - Forecast Sales of Edible Oils by Category: Volume 2025-2030
Table 21 - Forecast Sales of Edible Oils by Category: Value 2025-2030
Table 22 - Forecast Sales of Edible Oils by Category: % Volume Growth 2025-2030
Table 23 - Forecast Sales of Edible Oils by Category: % Value Growth 2025-2030

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[Meals and Soups in Spain](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Busier and smaller households drives demand for convenience

INDUSTRY PERFORMANCE

Global flavours and chilled innovation drive growth in meals and soups
Meal kits sustains growth despite market consolidation and rising retail competition

WHAT'S NEXT?

Chilled innovation and tourism ensure steady growth in meals and soups
Health-focused innovation and clean labels set to reshape product development
Sustainability and decarbonisation initiatives should strengthen category resilience

COMPETITIVE LANDSCAPE

Mercadona leads intensely competitive landscape
HelloFresh rises as competition remains absent

CHANNELS

Supermarkets blur lines with foodservice through expanded ready-to-eat offerings
E-commerce and quick commerce accelerate as hybrid shopping expands

CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2020-2025
Table 25 - Sales of Meals and Soups by Category: Value 2020-2025

Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2020-2025

Table 27 - Sales of Meals and Soups by Category: % Value Growth 2020-2025

Table 28 - Sales of Chilled Ready Meals by Ethnicity: % Value 2020-2025

Table 29 - Sales of Frozen Ready Meals by Ethnicity: % Value 2020-2025

Table 30 - Sales of Soup by Leading Flavours: Rankings 2020-2025

Table 31 - NBO Company Shares of Meals and Soups: % Value 2021-2025

Table 32 - LBN Brand Shares of Meals and Soups: % Value 2022-2025

Table 33 - Distribution of Meals and Soups by Format: % Value 2020-2025

Table 34 - Forecast Sales of Meals and Soups by Category: Volume 2025-2030

Table 35 - Forecast Sales of Meals and Soups by Category: Value 2025-2030

Table 36 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2025-2030

Table 37 - Forecast Sales of Meals and Soups by Category: % Value Growth 2025-2030

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Sauces, Dips and Condiments in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation, health, flavour and convenience in the spotlight

INDUSTRY PERFORMANCE

Global flavours and health-oriented innovation drive category expansion

Dips leads growth as guacamole and hummus gain mainstream appeal

WHAT'S NEXT?

Spicy flavours and foodservice expansion underpin future growth

Health positioning evolves towards functional and nutrient-enriched sauces

Sustainability and local sourcing to drive progress in sauces production

COMPETITIVE LANDSCAPE

Mercadona maintains overall leadership as Unilever and Heinz lose out to private label

Shukran rises thanks to activity in dips and ethnic focus

CHANNELS

Supermarkets remains dominant distribution channel as consumers appreciate affordable options

Expansion in discounters boosts channel network, while warehouse clubs gains ground as Costco grows

CATEGORY DATA

Table 38 - Sales of Sauces, Dips and Condiments by Category: Volume 2020-2025

Table 39 - Sales of Sauces, Dips and Condiments by Category: Value 2020-2025

Table 40 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2020-2025

Table 41 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2020-2025

Table 42 - Sales of Liquid Recipe Sauces by Type: % Value 2020-2025

Table 43 - Sales of Other Sauces and Condiments by Type: Rankings 2020-2025

Table 44 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2021-2025

Table 45 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2022-2025

Table 46 - Distribution of Sauces, Dips and Condiments by Format: % Value 2020-2025

Table 47 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2025-2030

Table 48 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2025-2030

Table 49 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2025-2030

Table 50 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2025-2030

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Sweet Spreads in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Higher prices and premiumisation boost value but volume hit by health concerns

INDUSTRY PERFORMANCE

Premiumisation and shifting consumption habits drive value growth in sweet spreads

High-protein and indulgent innovations boost nut and seed based spreads

WHAT'S NEXT?

Premiumisation to offset volume decline as brands target older demographics

Plant-based innovation gains traction as consumers seek healthier indulgence

New honey labelling rules aim to enhance transparency and protect local producers

COMPETITIVE LANDSCAPE

Idilia leads through popular Nocilla brand

Biogran and Biscoff enjoy robust growth in 2025

CHANNELS

Supermarkets remains on top amid rising competition from discounters

Warehouse clubs benefits from Costco expansion in Spain

CATEGORY DATA

Table 51 - Sales of Sweet Spreads by Category: Volume 2020-2025

Table 52 - Sales of Sweet Spreads by Category: Value 2020-2025

Table 53 - Sales of Sweet Spreads by Category: % Volume Growth 2020-2025

Table 54 - Sales of Sweet Spreads by Category: % Value Growth 2020-2025

Table 55 - Sales of Jams and Preserves by Leading Flavours: Rankings 2020-2025

Table 56 - NBO Company Shares of Sweet Spreads: % Value 2021-2025

Table 57 - LBN Brand Shares of Sweet Spreads: % Value 2022-2025

Table 58 - Distribution of Sweet Spreads by Format: % Value 2020-2025

Table 59 - Forecast Sales of Sweet Spreads by Category: Volume 2025-2030

Table 60 - Forecast Sales of Sweet Spreads by Category: Value 2025-2030

Table 61 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2025-2030

Table 62 - Forecast Sales of Sweet Spreads by Category: % Value Growth 2025-2030

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