



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in Spain

November 2025

Processed Meat, Seafood and Alternatives To Meat in Spain - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers seeking convenient, high quality and natural products

INDUSTRY PERFORMANCE

Premiumisation, health focus and convenience support growth in 2025

Meat and seafood substitutes drives overall category expansion

WHAT'S NEXT?

Premiumisation and evolving flexitarian habits sustain future growth potential

High-protein launches and food tech investment to drive product development

Labelling debate underscores tensions between meat and plant-based sectors

COMPETITIVE LANDSCAPE

Mercadona leads amid broader private label expansion

Plant-based innovation shapes competitive dynamics

CHANNELS

Supermarkets leads though struggles to maintain share

E-commerce posts fastest rise, stealing share from supermarkets in 2025

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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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
La Cuerva sees rapid growth in frozen fruit

CHANNELS

Proximity formats and discounters strengthen competition in retail
E-commerce and quick commerce expand as consumers embrace hybrid shopping

MARKET DATA

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