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Report Highlights:

In 2024, Spain imported \$2.2 billion of agricultural and related products from the United States. Outside the European Union Member States, the United States was the fourth largest origin of agricultural and related imports. Spain's economy continues to be resilient, and GDP is estimated to grow 2.5 percent in 2025, above the Euro area average. Spain received 93.8 million international tourists in 2024, a 10.1 percent increase from previous year. This was Spain's second record-breaking year since 2019 and the best year for tourism in the country since records started. Though general inflation is relatively contained, grocery product prices remain high. This is increasing the importance of private label in the shopping basket and decreasing consumers' loyalty. Spain will continue to offer opportunities for certain consumer-oriented food items and enhance long-term prospects for other products. This report provides guidance to U.S. companies interested in exporting consumer-ready food products to Spain.

Market Fact Sheet: Spain

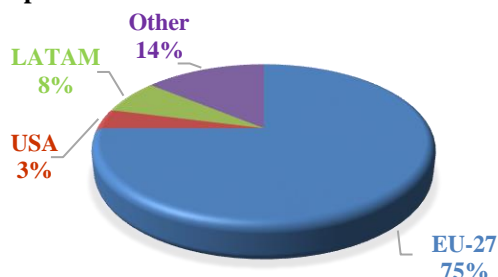
Executive Summary

Spain is a major producer and exporter of food and agricultural products, with other EU countries as its primary export destination. Spanish producers, processors, wholesalers, retailers, food service operators, and importers are all part of a well-developed agribusiness sector, contributing to a competitive and dynamic domestic scenario. In 2024, Spain's total imports of agricultural and related products reached \$65.2 billion, almost 1 percent up compared to 2023; 57 percent of these imports originated from the European Union.

Imports of Consumer-Oriented Products

Goods imported into Spain must meet the EU sanitary and phytosanitary requirements to protect human and animal health, as well as requirements under the customs union. Hence, U.S. exporters already exporting to other EU member states will likely meet most of the Spanish import requirements. For the export of animal products, the production plant must be approved for export to the EU.

Total Imports of Consumer-Oriented Products 2024



Food Processing Industry

In 2024, the food-processing sector continued to consolidate its position as an important industrial sector. Spain enjoys a modern food-processing sector that pays special attention to the quality, safety, and traceability of the food products it produces. It has one of the most competitive food processing industries in Europe, which makes this sector an important target for U.S. exports of food ingredients. Industry's interest in developing new products continues to present opportunities for food ingredients.

Food Retail Industry

The retail competitive landscape remained highly fragmented in 2024. Within grocery store-based retailing, the competitive environment is concentrated, with Mercadona retaining its leadership, followed by Carrefour. Uncertain economic conditions and reduced disposable income are expected to persist into 2025, leading consumers to focus on essential items and reduce impulse purchases, forcing retailers to maximize their efficiency to retain margins.

Quick Facts CY2024

World Imports of Consumer-Oriented Products

\$28.78 billion (+10.08%)

List of Top 10 U.S. Growth Products

- | | |
|----------------------|-------------------------------|
| 1) Distilled Spirits | 2) Walnuts |
| 3) Pistachios | 4) Whey Protein |
| 5) Pecans | 6) Chocolate & Cocoa Products |
| 7) Sauces (Mustard) | 8) Bakery Goods |
| 9) Hake | 10) Squid |

Food Processing Industry Facts 2024

Food Industry Output	\$181 bn
Food Exports	\$57 bn
Trade Surplus	\$18 bn
No. of Employees	474,600
No. of Food Processors	27,896
% of total GDP	2%

Top Country Retailers Sales 2024 (Estimate) (\$ Million)

- | | |
|------------------------------------|--------|
| 1) Mercadona | 34,500 |
| 2) Grupo Carrefour | 12,000 |
| 3) Lidl | 7,500 |
| 4) DIA | 6,150 |
| 5) Grupo Eroski | 5,800 |
| 6) Alcampo | 5,500 |
| 7) Consum. S.Coop. | 4,500 |
| 8) El Corte Ingles | 3,500 |
| 9) Bonpreu | 2,500 |
| 10) Ahorramás | 2,300 |

GDP / Population 2024

Population: 48.4 million

Real GDP (nominal, est): \$1.4 trillion

GDP Per capita (real, est): \$30,770

Sources: FIAB, Alimarket, TDM, GATS, Eurostat

Strengths/Weaknesses/Opportunities/Challenges

SWOT ANALYSIS

Strengths	Weaknesses
Diversified economic base; modern and well-developed infrastructure	High consumer price sensitivity
Opportunities	Threats
Emphasis on health and sustainability; food industry demand for food ingredients	International trade disruptions; low productivity

Data and Information Sources: Euromonitor, Eurostat, TDM LLC; Contact: AgMadrid@usda.gov

SECTION I. MARKET OVERVIEW

Economic Trends

The Spanish economy grew 3.2 percent in 2024, one of the fastest in the eurozone, driven by strong domestic demand, robust tourism, and EU recovery funds, outperforming other traditionally stronger economies such as Germany and France. Economists say Spain remains a ‘bright spot’ in Europe, expecting this outperformance to continue through 2025.

In their latest [World Economic Outlook report](#), the International Monetary Fund (IMF) forecasts a 2.5 percent growth rate for the Spanish economy in 2025 and 1.8 percent in 2026. Despite this projected fall compared to 2024, the good news is that Spain is expected to continue to weather the storm better than other advanced European economies. The growth forecast for Spain’s economy is still above the average growth forecast for the Euro area (0.8 percent in 2025 and 1.2 percent in 2026) and other advanced economies). Risks have become more balanced, but there are still external risks, such as the stagnation of the eurozone, high economic policy uncertainty due to the lack of consensus in Europe, and international trade uncertainties. There are also internal risks, such as investment that has not yet responded to GDP growth, the lack of housing, aging, and the high unemployment rate.

Spain received 93.8 million international tourists in 2024, a 10.1 percent increase from previous year. This was Spain’s second record-breaking year since 2019 and the best year for tourism in the country since records started. Spain’s economy in general, and the HRI sector in particular, is heavily dependent on tourism, which accounts for 12.3 percent of gross domestic product.

In terms of population and demographic trends, Spain’s population went from 40.5 million in 2000 to a record population of 49 million on January 1, 2025. According to the National Statistics Institute ([INE](#)), this is the highest-ever figure since records began. This figure confirms that Spain's population growth continues, due almost entirely to an increase in foreign citizen naturalization. Despite this increase, Spain has one of the lowest fertility rates in the world and a rapidly aging population, a trend that is forecast to continue in the next decade. Correspondingly, the market will have to adapt to this demographic change and its impact on future consumer trends and preferences. This will create opportunities for new formats and products targeting those segments of the population.

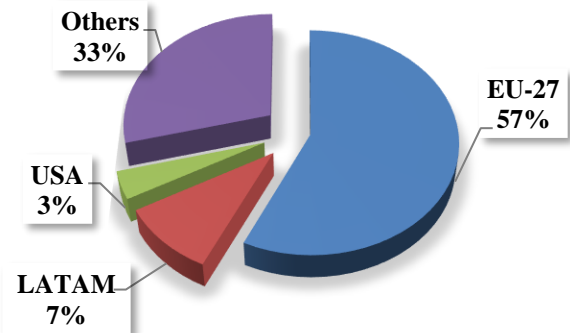
Table 1. Advantages and Challenges Facing U.S. Exporters in Spain

Advantages	Challenges
Spanish consumers are increasingly open to new products. The United States is a favorite destination for Spanish travelers outside the EU, increasing the popularity and interest in U.S. food products.	High import tariffs and import regulations impose a price disadvantage on non-EU based companies. Competitive disadvantage exist with direct competitors with signed Free Trade Agreements, such as Canada.
U.S. products have a good reputation with importers and retailers. U.S. suppliers are known for being serious business partners. Consistent quality and supply reliability are highly appreciated.	Food imported from third countries, including the U.S., must comply with EU food laws and labeling, traceability, and packaging rules, which vary from U.S. regulation and practice.

Increased demand in retail channel for innovative and sustainable products and packaging. Importers look to the U.S. as a source for novel products and new trends.	High transportation costs. Small exporters face difficulties in shipping mixed/smaller container loads vs EU competitors or big exporters.
Good network of agents and importers to help get products into the market and consequently, into the retail chain.	Competition from EU countries, where tastes and traditional products may be better known.
Consumers are increasingly health conscious, demanding new products. U.S. suppliers are known for offering a wide variety of these types of products.	Lack of consumer awareness of U.S. brands, applicability, and varieties of U.S. products. Despite interest, introducing new-to-market brands and products is not easy.
Distribution structure is modern, and many companies cover both Spain and Portugal.	The economic environment post-pandemic; adjustments to the overall economy, tourism, and consumer habits.

In 2024, Spain imported \$65.2 billion worth of agricultural and related products from the world. By region, Spain’s main trading partners are other EU Member States, as shown in the chart below:

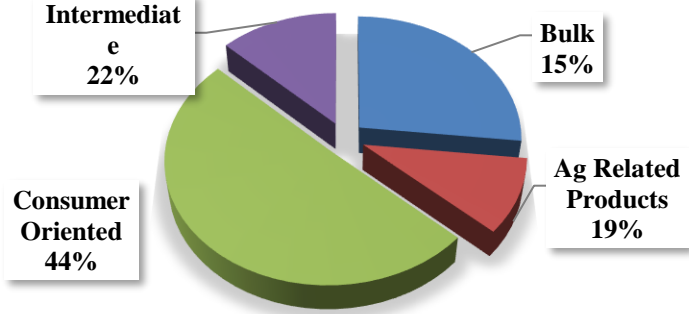
Figure 1. Spain's Food and Agricultural Product Imports 2024



SOURCE: Trade Data Monitor, LLC

By category, the distribution of Spain imports of food and agricultural exports from the United States in 2024 was as follows:

Figure 2. Spain Food and Agricultural Imports from the U.S. 2024



SOURCE: Trade Data Monitor, LLC

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

Success in introducing products in the Spanish market requires local representation and personal contact. With the recent years' pandemic restrictions and gathering limitations, as well as the cancelation and postponement of trade shows and other large meetings, Spanish companies have adapted and are increasingly willing to engage through online interactions. A local representative can provide up-to-date market intelligence, guidance on business practices and trade-related laws, sales contact with existing and potential buyers, and market development expertise.

Spain has sales channels ranging from traditional distribution methods, in which wholesalers sell to small retailers that sell to the public, to large multinational supermarkets and retail stores. However, personal relationships are still very important, especially within smaller organizations. There is no substitute for face-to-face meetings with Spanish business representatives to break into this market. The decision-making process within a Spanish company may be different from that in the United States. An initial "yes" usually means that the company will study the situation, and not necessarily that they will buy the product. Once a deal is signed, the Spanish company will likely expect the U.S. firm to translate into Spanish commercial brochures, technical specifications, and other marketing materials. Decision makers at Spanish firms may speak English, but paperwork should be in Spanish.

The Spanish market is composed of regional markets serviced by two major hubs, Madrid and Barcelona. Most agents, distributors, foreign subsidiaries, and government-controlled entities that make up the economic power block of the country operate in these two hubs. Dealers, branch offices, and government offices found outside these two hubs will almost invariably obtain their supplies from their Madrid and Barcelona contacts rather than engage in direct importation.

Market Entry Strategies

Market entry strategies for U.S. products intending to enter the Spanish market should include:

- Market research to assess product opportunities
- Advanced calculations of the cost of introducing the product in the Spanish market to prove its competitiveness in the local market
- Identify an experienced distributor or independent reliable agent to advise on adequate distribution channels, import duties, sanitary regulations, and labeling requirements
- Explore the purchasing arrangements of the larger retail channels

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

Food Standards and Regulations

For detailed information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standards Report ([FAIRS](#)) and the [FAIRS](#) Export Certificate Report for the [EU](#)

and [Spain](#). In addition, check the U.S. Mission to the European Union ([USEU Mission](#)) web page for helpful information on exporting U.S. food and agricultural products into the EU.

General Import and Inspection Procedures

Spain follows the Harmonized Nomenclature and Classification System (HS) and applies [EU import duties](#) according to a maximum and minimum rate schedule. The minimum tariff rate is applied to goods originating in countries entitled to the benefits of most-favored nation treatment; that is, members of the World Trade Organization (WTO), including the United States, and countries with which the EU has signed trade agreements. In some instances, [negotiations and trade agreements](#) in place between the EU and other countries provide for advantageous access to the European market.

Currently, the EU and the United States have the following agreements and arrangement in place:

- [US-EU Organic Equivalency Arrangement](#)
- [Veterinary Equivalency Agreement](#)

The local importer has primary responsibility with the Spanish Government for imported food products once they enter Spain. It is recommended that U.S. exporters verify all import requirements with their Spanish buyer. The buyer and local freight forwarder are in the best position to research such matters and assist with local authorities. The final authorization to import any product is subject to the Spanish rules and regulations as interpreted by border officials at the time of product entry.

In general, the following documents are required for ocean or air cargo shipments of food products into Spain:

- Bill of Lading and/or Airway Bill
- Commercial Invoice
- Phytosanitary Certificate and/or Health Certificate, when applicable
- Import Certificate

The Standard U.S. label does not comply with the EU's labeling requirements. For all the details, visit the [EU labeling requirements](#) section of the [USEU Mission](#) webpage.

Please keep in mind that if the product you are exporting into Spain does not comply with EU harmonized regulations, Spanish customs or health authorities may not allow entry of the product.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

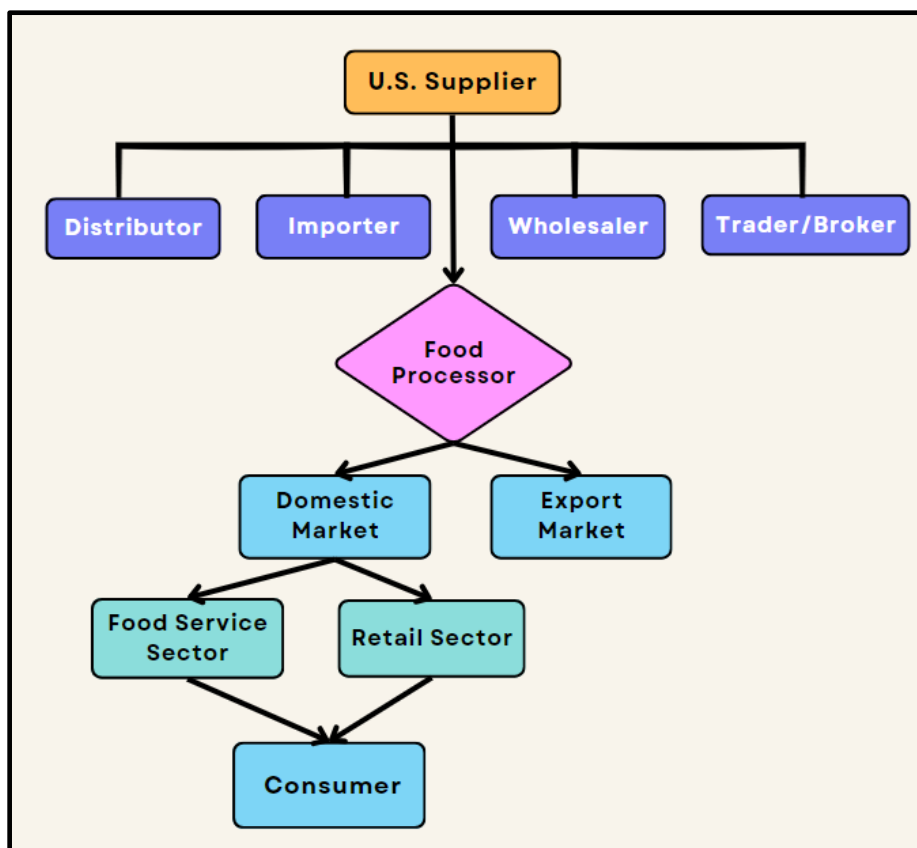
Table 2. Best Consumer-Oriented Product Prospects Based on Growth Trends

Product Category (TMT; million USD)	Major Supply Sources in 2024 (in value)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Frozen Fish Quantity: 276 Value: \$745	1.Portugal - 14% 2.Seychelles - 7% 3.Morocco - 6%	Other major suppliers offer high quality fish products at competitive prices.	Large competition from local producers. Domestic consumption and exports largely exceed local supply.

Almonds Quantity: 110 Value: \$387	1. USA - 74% 2. Portugal - 15% 3. Australia - 4%	Limited competition from other countries. Spanish demand is high, and production is insufficient to satisfy demand.	Spain produces almonds, mostly used roasted as a snack. U.S. almonds are processed, both used domestically or exported.
Pulses Quantity: 295 Value: \$268	1. USA - 22% 2. Canada - 5% 3. Argentina - 15%	Strong competition from Argentina, which greatly increased its presence in recent years, and Canada, a traditional supplier.	Spain is a traditional consumer of pulses and a net importer, as local production is insufficient to fulfill internal demand.
Pistachios Quantity: 20 Value: \$168	1. USA - 81% 2. Germany - 9% 3. Iran - 6%	Germany is the main entry point for U.S. pistachios. Iranian pistachios are the competitor in the Spanish market and offer lower prices.	Local pistachio production is growing, but still very limited. Demand continues to grow significantly.
Sweet Potatoes Quantity: 23 Value: \$18	1. Egypt - 39% 2. Portugal - 17% 3. USA - 13%	Other major suppliers offer high quality products at competitive prices.	Imports from the world and the U.S. have increased considerably in the last five years. Demand and consumption continue to be strong.
Distilled Spirits Value: \$1,023	1. U.K. - 31% 2. USA - 13% 3. Netherlands - 12%	Main competitors are other EU countries. Difference in legal format of alcohol containers; exporters need to adapt to EU size.	Increasing interest in U.S. distilled drinks, mainly bourbon and gin.

Source: Trade Data Monitor, LLC

Market Structure:



Food Retail Sector

Retail in Spain showed signs of gradual stabilization, facing inflation and a series of economic challenges, with consumer confidence slowly returning. Inflation is under control thus easing the inflationary pressure, although grocery product prices remain high. In this context, consumer habits continue to evolve, both in the composition of the shopping basket and in the shopper profile. Consumers emerging from the latest inflationary crisis are no longer as faithful to particular retailers and are more attentive to price and promotions to contain spending. With supermarkets struggling to maintain affordable prices for their branded products, private label is becoming an increasingly important competitive tool for retaining the loyalty of shoppers. In this sense, discounters are a good example. In the Spanish market, discounters have built their reputation on lower prices than those found in supermarkets, and price remained the main factor driving consumers' purchasing decisions in 2024. Private label products have proven key in generating sales growth within these retailers, as they continue to be the preferred option for many shoppers. The appeal of private label remains strong due to their cost-quality ratio.

In addition, according to consumer behavior surveys from the Spanish retail association, shoppers in Spain prefer more frequent visits to nearby grocery stores over making larger purchases once or twice a week. This shift has led to a decline in sales for the supermarkets channel, particularly for chains less able to leverage proximity. In this environment, supermarket operators with an extensive distribution network positioned near consumers hold a competitive edge, and many grocery retailers are now opting for smaller retail spaces to maintain proximity and respond to changing consumer needs.

Table 3. Top 10 Spain Country Retailers

Retail Organization	Sales 2024 (\$ Million)*
<u>MERCADONA</u>	34,500
<u>GRUPO CARREFOUR</u>	12,000
<u>LIDL SUPERMERCADOS</u>	7,500
<u>DIA RETAIL ESPANA, S.A.</u>	6,150
<u>GRUPO EROSKI</u>	5,800
<u>ALCAMPO, S.A.</u>	5,500
<u>CONSUM, S. COOP.</u>	4,500
<u>EL CORTE INGLES ALIMENTACION</u>	3,500
<u>BON PREU, S.A.</u>	2,500
<u>AHORRAMAS</u>	2,300

Source: [Alimarket](#); *Estimate

In 2024, Mercadona continued to lead supermarkets in terms of value sales in Spain, driven by ongoing innovation in its private label product lines. Mercadona has also reiterated its commitment to the environment by introducing eco-friendly stores and expanding its in-store offerings to include more locally sourced products.

For more information, please see the [Spanish Retail Food Sector report](#).

Hotel, Restaurant and Institutional (HRI) Sector

The HRI sector in Spain showed remarkable strength and adaptability throughout 2024, consolidating the path to recovery and growing 6 percent compared to 2023. This dynamism was significantly driven by the exceptional performance of tourism, both national and international.

The HRI sector is highly connected with tourism. Spain's tourism industry data reflects an extraordinary recovery in tourism, as foreign tourist numbers reached record numbers in 2024. In 2024, Spain received 93.8 million international visitors, a 10.1 percent increase compared to the previous year, the best year for tourism in the country since records started. The income from foreign visitors reached \$143 billion, up 16 percent from the \$123 billion spent in 2023. Tourism, a buoyant sector that largely drives the positive economic results, accounts for 12.3 percent of the country's gross domestic product.

Spain already welcomed a record 17 million foreign tourists in the first three months of 2025, a 5.7 percent increase on the same period in 2024.

For more information on the [Spanish HRI Sector](#) report.

Food Processing Sector

In 2024, this sector provided 474,600 jobs, representing 19 percent of the total industrial workforce. The food industry in Spain consists of mostly small and medium-sized companies: in 2024, there were 27,896 food processors throughout the country. The industry produced \$181 billion worth of product in 2024. Exports continue to be critical for the development and support of the industry and were valued at \$57 billion in 2024, with a trade surplus of \$18 billion. The European Union continues to be Spain's first trading partner. Outside the EU, the main export destinations for Spanish food and beverage products are the United Kingdom, the United States, and China. Spain has some of the most competitive food processing industries in Europe, which makes the sector an important target for U.S. food ingredient exporters.

For more information on the Spanish food processing sector, visit [Spanish Food Processing Sector](#) report.

SECTION V. AGRICULTURAL and FOOD IMPORTS

Table 4. Agricultural and Food Import Statistics

AGRICULTURAL PRODUCTS IMPORTS (\$ Million)	2021	2022	2023	2024	2025*
Total Agricultural and Related Products	54,418	63,814	64,910	65,225	66,000
Total U.S. Agricultural and Related Products	1,706	2,167	2,236	2,220	2,300
Total Agricultural Related Products	12,735	14,659	13,140	12,452	13,000
Total U.S. Agricultural Related Products	163	187	212	172	200
Total Consumer-Oriented Products	21,697	23,667	26,149	28,784	29,000
Total U.S. Consumer-Oriented Products	761	839	692	747	800
Total Seafood Products	8,889	9,637	9,225	9,491	9,500
Total U.S. Seafood Products	82	95	99	81	90

Source: Trade Data Monitor LLC; * Estimate

Best High-Value, Consumer-Oriented Product Prospects Category

Products Present in the Market with Good Sales Potential

Tree nuts (particularly almonds, walnuts, and pistachios) -- Peanuts -- Pulses -- Fish and Seafood (frozen) -- Surimi -- Spirits

Products Not Present in Significant Quantities with Good Sales Potential

Functional and innovative health food -- Free-from products (lactose-free, gluten-free) -- Specialty and snack foods -- Nuts e.g., pecans -- Sweet potatoes -- Pet foods

Products Not Present Because They Face Significant Barriers

Red meat and meat preparations (hormone ban) -- Poultry (sanitary procedures, i.e., pathogen reduction treatments) -- Processed food (with GMO ingredients)

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions, please contact the [OAA in Madrid](#). The [FAS website](#) also offers recent reports of interest to U.S. exporters interested in the Spanish market. Additionally, useful contacts include:

Trade Associations

[Spanish Federation of Food and Beverage Industries](#)

[Spanish Federation for HRI Sector](#)

[Spanish Association for Distributors and Supermarkets](#)

[Spanish Restaurant Chain Association](#)

Government Agencies

[Spanish Agency for Food Safety and Nutrition](#)

[Ministry of Agriculture, Fisheries and Food](#)

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov

Attachments:

No Attachments