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Report Highlights:

In 2024, Spain imported $2.2 billion worth of agricultural, seafood and forest products from the United States. Following significant efforts to recover from the COVID-19 crisis, companies are once again facing a challenging environment that includes high production costs and economic and political uncertainties. Despite these challenges, Spain's food and beverage sector continues to show a constant and positive performance. With one of the most resilient and competitive food processing industries in Europe, Spain's demand for food ingredients continues to increase, as well as its demand for distilled spirits, tree nuts, and chocolate and cocoa products.

Market Fact Sheet: Spain

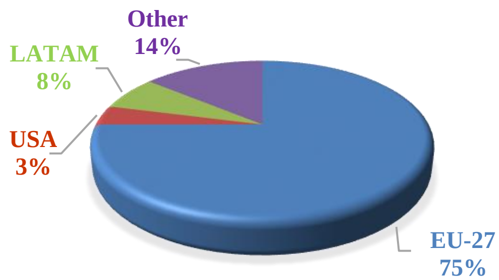
Executive Summary

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 2023

Food Industry Output	$175 bn
Food Exports	$51 bn
Trade Surplus	$15 bn
No. of Employees	463,900
No. of Food Processors	28,335
% 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) Ahorramas	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 SUMMARY

The food and beverage industry in Spain is one of the country's leading industrial sectors due to the sector's efforts to consolidate its value and increase its competitiveness over several decades. Its ability to overcome numerous crises had allowed it to become a key sector in Spain's economy.

The new global economic scenario, characterized by political and economic uncertainty, has not spared the food and beverage industry, which must respond quickly to demanding situations. Inflation, present since 2021, continues to affect both consumer purchasing power and the industry's activities. Increasing production costs hinder the sector's competitiveness and have impacts on consumption, access to the international market, and production indices. Environmental factors also add additional pressure, given the increase in adverse climatic episodes.

However, despite these challenges, Spain's food and beverage sector has continued its positive performance. In 2023, the food and beverage industry continued to be the strongest industrial sector in Spain. Its gross added value, estimated at $32.5 billion, represented 19 percent of the manufacturing industry and close to two percent of the total Spanish economy.

Last year again proved to be a demanding year for small and medium companies. In 2024, the food and beverage industry maintained its business network with 28,335 companies, six percent less than the previous year. Macroeconomic instability and increased financial costs delay again affected business growth in a sector in which small and medium size companies continue to represent more than 96 percent of the sector.

Table 1. Advantages and Challenges Facing U.S. Food Processing Ingredients

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.	Adjustments to the overall domestic and international economic situation (inflation, international conflicts, drought, logistics challenges).
Spain's food industry relies on imported ingredients, many from the United States, which have a good image and reputation.	Food imported from third countries, including the U.S., must comply with EU food law, labeling, traceability, and packaging laws, which vary from U.S. regulation and practice.
Increased demand in retail channels is pushing food processors to be more innovative to provide new offerings.	High transportation costs. Small exporters face added 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.	Competition from EU countries, where tastes and traditional products may be better known.
New generation of consumers demand healthy, innovative, sustainable products, creating new opportunities.	Lack of consumer awareness of U.S. brands, applicability, and varieties of U.S. products.
Distribution structure is modern and many companies cover both Spain and Portugal.	High import tariffs and import regulations impose a price disadvantage on non-EU based companies.

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

Success in introducing products in the Spanish market requires local representation and personal contact. 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. The Office of Agricultural Affairs in Madrid maintains listings of potential importers and develops sector-specific information to help introduce your product in Spain.

Spanish government agencies, such as the Tax Agency and the Ministry of Agriculture, are involved in the implementation and enforcement of European legislation relating to external trade, not only for customs duties and commercial policy measures, but also as regards security, environmental, anti-dumping, consumer protection, cultural and agricultural controls. Goods imported into the EU must meet the sanitary and phytosanitary requirements to protect human and animal health and as part of the custom union. Though Spain implements harmonized EU rules and regulations, there are subtleties that exporters should learn about when considering exporting to Spain. For more information, potential U.S. exporters can contact our office for additional sector-specific information. U.S. exporters already exporting to other Member States will likely meet most of the requirements for exporting to Spain.

Typically, operators buy food ingredients from importers or wholesalers. Some large companies buy directly from foreign suppliers. Other companies concentrate on the domestic or on export markets, but most will have mixed customers. Companies supplying the domestic market frequently sell their products directly and have their own logistics infrastructure. However, their customers will vary from wholesalers to buying groups and retailers. Companies producing for re-export may have their own marketing office overseas, local agents, or may work with local importers.

U.S. exporters also face challenges with EU labeling and traceability regulations. Labeling is required for any product that contains genetically modified ingredients. For details, visit the EU labeling requirements section of the USEU Mission webpage.

Import Procedures

The local importer has primary responsibility with the Spanish Government for imported food products once they enter Spain. It is recommended that 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.

Spain follows the Harmonized Nomenclature and Classification System (HS) and applies EU import duties according to a maximum and minimum rate schedule. If your product is or contains plant or animal products, it will require a phytosanitary or health certificate issued by the competent U.S. authority. In addition, if you are exporting animal products, your production plant must be approved to export into the EU.

The following documents are required for ocean or air cargo shipments of food products into Spain:

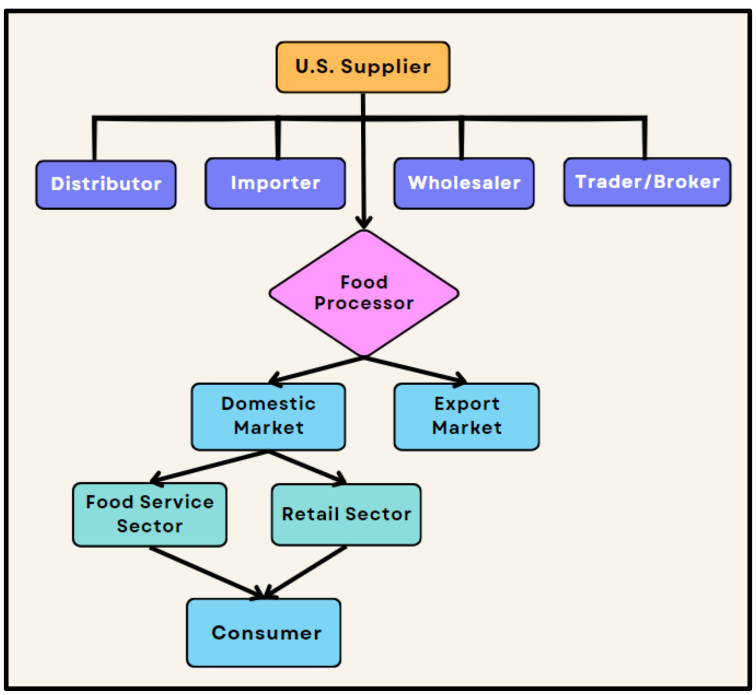
- Bill of Lading and/or Airway Bill
- Commercial Invoice
- Phytosanitary Certificate and/or Health Certificate, when applicable
- Import Certificate

For all details, please check the Food and Agricultural Import Regulations and Standards Report (FAIRS) and the FAIRS Export Certificate Report for the EU and Spain, and the U.S. Mission to the European Union (USEU Mission) website for helpful information on exporting U.S. food and agricultural products into the EU. 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.

Trade Shows

Trade shows in Spain continue to offer excellent opportunities for U.S. exporters to contact potential clients or business partners from Spain, Portugal, other EU countries and other continents. The most important trade shows are: Alimentaria, in Barcelona March 23-26, 2026, and the USDA-endorsed show Seafood Expo Global, in Barcelona May 6-8, 2025.

Market Structure



For more information on the Spanish food processing sector, visit FAS GAIN Home.

Company Profiles

The Spanish food-processing sector has a wide range of food processing companies, many of which import food ingredients. The Spanish food industry consists of 28,335 companies. The table below shows how these companies are distributed among the main sectors:

Table 2. Food Processing Industry by Sector (Million $)			
	2023	% Change 2022/23	% Food and Beverage Industry
Meat & Meat Products	46,200	11.2	24.19
Beverages	28,125	6.2	14.73
Animal Feed	20,461	-5.4	10.71
Other Food Products	18,824	13.5	9.86
Fats & Oils	17,686	4.4	9.67
Dairy Products	16,900	17.1	8.85
Bread and Pasta	13,444	8.7	7.04
Fruits & Vegetables	14,138	-2.0	7.40
Fishery Products	8,760	3.6	4.59
Milling Industry	5,651	-7.0	2.96

Source: FIAB

Main Companies Operating in the Food Processing Industry

Company	Sales 2024 (Million $)*	End-User Channels	Procurement Channels
RED MEATS			
Valls Companys – Grupo (**)	4,499	Retail & HRI	Local products/ Imports
Corporación Alimentaria Guissona, S.A. (Bonàrea Corporación) (**)	2,922	Retail & HRI	Local products/ Imports
Campofrío Food Group, S.A.**	2,293	Retail & HRI	Local products/ Imports
POULTRY PRODUCTS			
Vall Companys – Grupo (**Error! Hyperlink reference not valid.**	4,499	Retail & HRI	Local products/ Imports
Corporación Alimentaria Guissona, S.A. (Bonàrea Corporación) (**)	2922	Retail & HRI	Local products/ Imports
Cooperativas Orensanas, SCG (COREN) - Grupo (**)	1,519	Retail & HRI	Local products/ Imports
CANNED FISH			
Jealsa Grupo**	844	Retail & HRI	Local products/ Imports
Luis Calvo Sanz, S.A. (Grupo Nanterra)**	754	Retail & HRI	Local products/ Imports
Frinsa del Noroeste, S.A. - Grupo	738	Retail & HRI	Local products/ Imports
DAIRY PRODUCTS			
Corporación Alimentaria Guissona, S.A. (Bonàrea Corporación) (**)	2,922	Retail & HRI	Local products/ Imports
Grupo Lactalis Iberia, S.A. (**)	1,831	Retail & HRI	Local products/ Imports
Industrias Lácteas Asturianas, S.A. (Reny Picot) – Grupo (**)	938	Retail & HRI	Local products/ Imports
CANNED VEGETABLES			
Conservas El Cidacos, S.A. (**)	531	Retail & HRI	Local products/ Imports
Coop. Alimentos del Mediterraneo Alimer (**)	315	Retail & HRI	Local products/ Imports
Industrias Alimentarias de Navarra, S.A.U. (Grupo IAN) (**)	234	Retail & HRI	Local products/ Imports
BAKED PRODUCTS			

Vicky Foods – Grupo (**)	682	Retail & HRI	Local products/ Imports
Bimbo Donuts Iberia, S.A. (**)	643	Retail & HRI	Local products/ Imports
Pepsico Foods, A.I.E.**	194	Retail & HRI	Local products/ Imports
BAKED PRODUCTS (COOKIES)			
Mondelez Iberia Snacking Holdings, S.L. - Grupo Mondelez International (**)	1,027	Retail & HRI	Local products/ Imports
Galletas Gullón, S.A. - Grupo	683	Retail & HRI	Local products/ Imports
Vicky Foods – Grupo (**)	682	Retail & HRI	Local products/ Imports
NUTS & SNACKS			
Importaco, S.A. - Grupo **	879	Retail & HRI	Local products/ Imports
Frit Ravich, S.L.	328	Retail & HRI	Local products/ Imports
Pepsico Foods, A.I.E.**	194	Retail & HRI	Local products/ Imports
CONDIMENTS AND SEASONINGS			
Borges Agricultural & Industrial Edible Oils, S.A. (BAIEO)**	837	Retail & HRI	Local products/ Imports
Grupo Ybarra Alimentación, S.L. (GYA) **	301	Retail & HRI	Local products/ Imports
Borges Branded Foods, S.L.U.**	190	Retail & HRI	Local products/ Imports
SAUCES			
Nestlé España, S.A. – Grupo (**)	2,707	Retail & HRI	Local products/ Imports
Aceites del Sur – Coosur, s.a. (ACESUR) - Grupo (**)	1,235	Retail & HRI	Local products/ Imports
Deoleo, S.A. – Grupo (**)	907	Retail & HRI	Local products/ Imports
RICE			
Ebro Foods, S.A. – Rice Division	2,651	Retail & HRI	Local products/ Imports
Dacsa Group (**)	616	Retail & HRI	Local products/ Imports
Arrocerias Pons, S.A. (Grupo)	146	Retail & HRI	Local products/ Imports
PASTA			
Ebro Foods, S.A. Group (**)	3,345	Retail & HRI	Local products/ Imports
The GB Foods, S.A. – Grupo (**)	1585	Retail & HRI	Local products/ Imports
Cerealto Siro Foods, S.L.**	502	Retail & HRI	Local products/ Imports
PULSES			
Conservas El Cidacos, S.A. (**)	531	Retail & HRI	Local products/ Imports
Ind. Aliment. de Navarra, S.A.U. (Grupo IAN) (**)	290	Retail & HRI	Local products/ Imports
Legumbres Luengo, S.A. **	113	Retail & HRI	Local products/ Imports
SPECIALIZED FOOD INGREDIENTS			
Bunge Ibérica, S.A.(**)	3,611	Food Manufacturers	Local products/ Imports
Cargill S.L. Grupo (**)	1,865	Food Manufacturers	Local products/ Imports
Viscofan, S.A. Grupo	1,301	Food Manufacturers	Local products/ Imports
BEVERAGES: ALCOHOLIC & NON-ALCOHOLIC			
Coca-Cola Europacific Partners Iberia, S.L.U. (CCEP IBERIA) (**)	3,690	Retail & HRI	Local products/ Imports
Damm, S.A. Grupo	2,182	Retail & HRI	Local products/ Imports
Mahou, S.A. – (Grupo Mahou San Miguel)	2,071	Retail & HRI	Local products/ Imports

Source: Alimarket * Estimated; ** Data includes activities in other sectors

Sector Trends

"Invest in Spain" recently published its "Guide to Business in Spain" report. This report (in English) contains useful and up to date information on Spain's economy, reforms to increase competitiveness, employment trends, and foreign investment, among other topics to understand the Spanish business climate.

Many U.S. companies are present in Spain, either through joint ventures, acquisitions, etc. Some examples of U.S. companies in the Spanish food and beverage industry are (in alphabetical order): Bunge Iberica - fats and oils; Cargill - fats, oils, additives, pet food; Coca Cola España - beverages, snacks; H.J. Heinz Foods Spain - prepared vegetables; Mondelez International - cheese, snacks; Kellogg's España - breakfast cereal; Pepsico España - beverages, juices, snacks.

Major Consumer Trends:

- **Price sensitivity:** 75 percent of Spanish consumers look for a bargain before making a final purchasing decision, while a quarter leave their regular retailer if they find lower prices elsewhere. Price sensitivity also results in a lack of loyalty to brands.
- **Environmental shift and pressure:** Increasing awareness of environmental challenges are having a powerful impact on consumer behavior and purchasing decision making.
- **Population changes:** Trends such as urbanization, migration, and aging are reshaping consumer lifestyles and shopping decisions. Single/two person households are growing and households of four or more persons are declining. The low birth rate and the increasing percentage of elderly people is another trend that will require adjustments in market supply.

SECTION III. COMPETITION

Spain's main trading partner is the EU-27. The lack of trade tariffs, trade barriers and other restrictions make European goods more attractive and competitive, particularly to price sensitive goods.

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 Imports: 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 Imports: 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 Imports: 294 Value: $268	1. USA - 22% 2. Canada -15% 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 Imports: 20 Value: $168	1.USA-80% 2. Germany - 8% 3. Iran - 6%	Iranian pistachios are the low-price competitor but continue to lose market share.	Local pistachio production is growing but still very limited. Demand continues to grow significantly.
Sunflower Seeds Imports: 261 Value: $195	1.France-43% 2.China-38% 3.Romania-6%	Used for confectionery. Growing competition from China on price; Argentina competes on quality.	Traditional snack. Local production is insufficient to meet demand.

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Table 3. Spain Agricultural and Food Import Statistics

AGRICULTURAL PRODUCTS IMPORTS	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 Products	**12,735**	**14,659**	**13,140**	**12,452**	**13,000**
Total U.S. Agricultural 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: TDM Inc; Unit: $ Million; *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 -- Sunflower seeds -- 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 -- Sweet potatoes -- Pet foods
Products Not Present Because They Face Significant Barriers: Red meat and meat preparations (hormone ban) -- Poultry (sanitary procedures - chlorine wash) -- Processed food (with GMO ingredients)

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions, please contact the Office of Agricultural Affairs in Madrid. The FAS website offers recent reports of interest to U.S. exporters interested in the Spanish market.

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 Food Safety and Nutrition Agency; Ministry of Agriculture, Fisheries and Food

No Attachments

Attachments: