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Report Highlights:

Spain is a major agricultural powerhouse in Europe, ranking as the third largest producer in the EU. It is a critical hub for produce, meat, and processed food, fueled by domestic and imported inputs. In 2025, Spain imported $2.85 billion worth of agricultural, seafood and forest products from the United States, the highest level ever. Spain remains the third largest destination for U.S. agricultural exports in the EU, after Netherlands and Germany. Despite some challenges, including high production costs and economic and political uncertainties, Spain's food and beverage sector continues to maintain positive performance. Looking to the future, with one of the most resilient and competitive food processing industries in Europe, Spain's demand for food ingredients is projected to continue rising, as well as its demand for tree nuts, pulses, distilled spirits, and seafood products.

retaining its leadership, followed by Carrefour. Uncertain economic conditions and reduced disposable income are expected to persist in 2026, leading consumers to focus on essential items and reduce impulse purchases, forcing retailers to maximize their efficiency to retain margins.

Market Fact Sheet: Spain

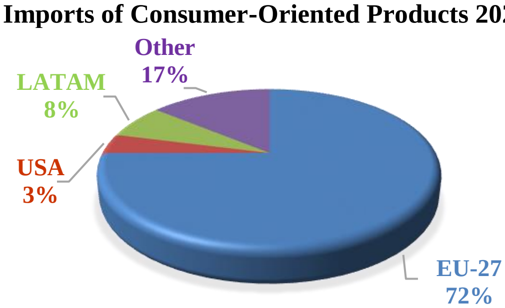
Executive Summary

Spain is a major producer and exporter of food and agricultural products, mainly to other EU countries. Spanish producers, processors, wholesalers, retailers, food service operators, and importers are all part of a strong agribusiness sector, contributing to a competitive and dynamic domestic scenario. In 2025, Spain's total imports of agricultural and related products reached $73 billion, 11 percent up compared to 2024; 57 percent of these imports originated from the European Union. Imports from the United States reached $2.85 billion, 27 percent higher than 2024.

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 2025



Food Processing Industry

In 2025, 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 competitive retail landscape remains highly fragmented in 2026. Within grocery store-based retailing, the competitive environment is concentrated, with Mercadona

Quick Facts CY2025

World Imports of Consumer-Oriented Products

$34.04 billion (+18.2%)

List of Top 10 U.S. Growth Products

1) Almonds	2) Pistachios
3) Walnuts	4) Pollock
5) Pulses	6) Food preparations
7) Pecans	8) Condiments & Sauces
9) Cod	10) Squid

Food Processing Industry Facts

Food Industry Output	$190 bn
Food Exports	$60 bn
Trade Surplus	$19 bn
No. of Employees	474,600
No. of Food Processors	27,896
% of total GDP	2%

Top Country Retailers	Sales 2025 (Estimate) ($ Million)
1) Mercadona	46,100
2) Grupo Carrefour	13,000
3) Lidl	8,500
4) DIA	7,000
5) Grupo Eroski	6,500
6) Alcampo	5,500
7) Consum, S.Coop.	5,100
8) El Corte Ingles	3,500
9) Bonpreu	3,000
10) Ahorramás	2,500

GDP / Population 2025

Population: 49.6 million

Real GDP (nominal, est): $1.89 trillion

GDP Per capita (nominal, est): $35,285

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	High inflation

sustainability; food industry demand for food ingredients	International instability

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

Section 1: Market Summary

Economic Trends

Spain enters 2026 with renewed confidence in its economic trajectory. In 2025, the country demonstrated resilience amid global trade disruptions and geopolitical tensions, achieving a robust growth rate of 2.8 percent. This performance not only exceeded initial projections of 2.3 percent but also outpaced the euro area's average expansion of 1.5 percent. Looking ahead, analysts anticipate that Spain will continue to outperform its European peers, maintaining strong momentum notwithstanding broader geopolitical and global trade dynamics. The foundation of this growth remains domestic demand, fueled by rising private consumption and investment, both supported by favorable financial conditions. Households are benefiting from increased disposable income, in the context of significant job creation, wage growth, and high migratory flows.

Spain's tourism sector continues to set records, with international arrivals and spending reaching unprecedented heights. In 2025, the country welcomed a record 96.8 million visitors, a 3.2 percent increase over the previous year, solidifying its position as a leading European destination despite local challenges and environmental concerns. Revenue from foreign tourists climbed almost seven percent to $158.9 billion, up from $148.6 billion in 2024. Tourism remains a cornerstone of Spain's economy, accounting for approximately 13 percent of GDP.

In 2025, Spain's food and beverage industry reinforced its reputation as a stable and resilient sector, demonstrating strength in production and notable growth in exports, both in value and volume, despite challenging global dynamics. Although production costs rose by 1.4 percent, the sector remains vital to the Spanish economy and employment. The sector continues to trend toward larger, consolidated companies.

Table 1. Advantages and Challenges of the Spanish Food Processing Ingredients Market

Advantages	Challenges
Spain is the fourth largest economy in the EU, with a large consumer market and its role as a key European food hub is growing.	High transportation costs. In addition, small exporters face difficulties in shipping mixed/smaller container loads vs EU competitors or big exporters.
Spain's food industry relies on imported ingredients, many from the United States, which have a good image and reputation.	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.	Potential for disruption due to EU policy shifts; global trade dynamic shifts.
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. Lack of

	consumer awareness of U.S. brands, applicability, and varieties of U.S. products
New generation of consumers demand healthy, innovative, sustainable products, creating new opportunities.	Consumers are very price sensitive (two thirds look for bargains when making purchasing decision), which decreases brand loyalty.
Distribution structure is modern and many companies cover both Spain and Portugal.	Import tariffs and regulations impose a price disadvantage on non-EU based companies.

SECTION II. ROAD MAP FOR ENTRY

Entry Strategy

To successfully introduce your products in Spain, having local representation and building personal connections are essential. A local representative can offer valuable market insights, assist with navigating business practices and trade laws, connect you with buyers, and provide expertise in market development. The Office of Agricultural Affairs in Madrid can support you by providing sector-specific information and a list of potential importers to help you enter the Spanish market.

All goods imported into the EU, including Spain, must comply with sanitary and phytosanitary standards designed to protect human and animal health. While Spain follows harmonized EU regulations, there are specific nuances exporters should understand. U.S. exporters already selling to other EU member states will likely meet most of Spain's requirements, but it's always a good idea to consult with FAS Madrid office for product-specific guidance.

In Spain, food ingredients for the HRI (Hotel, Restaurant, and Institutional) sector are typically purchased through importers or wholesalers, though larger companies may source directly from foreign suppliers. Spain exports about 30 percent of its food production (by value), primarily to other EU countries. Food-processing companies often serve both domestic and export markets. Those targeting the domestic market frequently handle their own logistics and sell directly to wholesalers, buying groups, or retailers, while exporters may rely on local agents, importers, or overseas marketing offices.

U.S. exporters should be aware of challenges related to EU labeling and traceability regulations. Products containing genetically modified (GM) ingredients must be clearly labeled. Consumer acceptance of GM foods in Spain remains low. As a result, many food processors, retailers, and HRI operators avoid purchasing GM products or ingredients.

For shipments of foodstuffs to Spain, the following documents are required: a Bill of Lading and/or Airway Bill, a Commercial Invoice, and a Phytosanitary Certificate and/or Health Certificate (if applicable). Products containing plant or animal origin products will need a phytosanitary or health certificate issued by the appropriate U.S. authority. For animal origin products, your production facility must be approved for export to the EU. Additionally, most food products require an Import Certificate, which the Spanish importer or agent is responsible for obtaining.

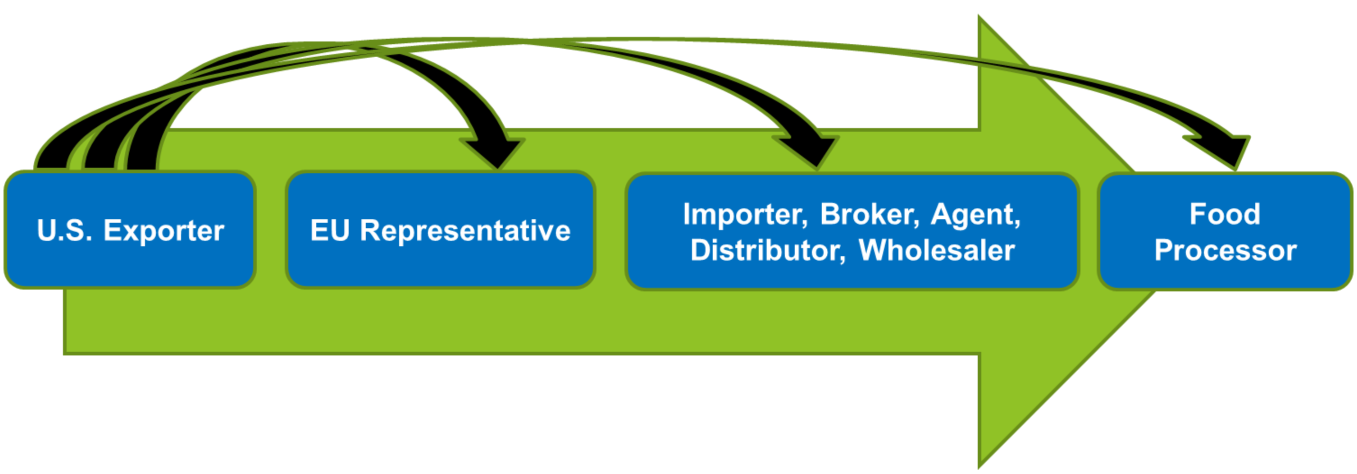
For more detailed guidance, including information on EU regulations, visit the U.S. Mission to the European Union's website. It's an excellent resource to help you navigate the process of exporting to Spain and the broader EU market.

Trade Shows
Trade shows in Spain offer excellent opportunities for U.S. exporters to contact potential clients from Spain, other EU countries, and other continents. The strong links of Spain with Latin America and its proximity to Northern Africa add value to trade shows in Spain. Below are the most important trade shows related to the food processing ingredients sector:

Table 2. Upcoming International Trade Shows in the Food Processing Sector in Spain

Trade Show	Date	Description
39th Salón Gourmets	April 13–16, 2026 Madrid	Europe's largest event for delicatessen products, featuring tastings, presentations, and show cooking for professional buyers in the HRI and retail sectors.
Seafood Expo Global (SEG) **USDA endorsed show**	April 21, 2026 Barcelona	The largest international exhibition for the seafood industry, endorsed by USDA.
Fruit Attraction	October 6-8, 2026	The leading international trade show for the fruit and vegetable sector in Spain, consolidating its position as the key hub for the global marketing of fruit and vegetables, with particular focus on Latin America and Europe
ANUGA Select Ibérica	February 16-18, 2026	The first general food fair in Madrid aims to fully leverage the potential of the Iberian market while building bridges with Latin American export markets.

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 them importing food ingredients. The Spanish food industry consists of 27,896 companies. The table below shows how these companies are distributed among the main sectors:

Table 2. Food Processing Industry by sector (Million $)			
	2024	**% Change 2023/24**	**% Food and Beverage Industry**
Meat & Meat Products	51,477	+6.2	23.79
Fishery Products	9,781	+4.7	4.52
Fruits & Vegetables	18,553	+7.3	8.57
Dairy Products	19,156	+5.2	8.85
Milling Industry	6,075	-7.7	2.81
Beverages	28,119	-1.2	12.99
Bread and Pasta	15,622	+4.4	7.22
Fats & Oils	21,400	+11.1	9.75
Animal Feed	13,458	-8.7	9.89
Other Food Products	25,097	+4.3	11.60

Source: FIAB

Main Companies Operating in the Food Processing Industry

Company	Sales 2025 (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 "Guide to Business in Spain 2025" report. This report (in English) contains useful and up to date information on Spain's economy, reforms to increase competitiveness, employment trends, foreign investment, amongst 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 - fats and oils; Cargill- fats, oils, additives, pet food; Coca Cola - beverages, snacks; H.J. Heinz Foods Spain- prepared vegetables; Mondelez International - cheese, snacks; Kellogg España - breakfast cereal; Pepsico - 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 people 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 Total Spain Import	Major Supply Sources in 2025 (in value)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Cod, Frozen 6,927 MT $48 million	1.Portugal -37% 2. Denmark -16% 3.Netherlands–15% **8. USA - 0.9%**	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 102 TMT	**1.USA-79%** 2.Portugal-13%	Limited competition from other countries. Spanish demand is	Spain produces almonds, mostly used roasted as a snack. U.S. almonds are

$565 million	3.Germany - 3%	high, and production is insufficient to satisfy demand.	processed, both used domestically or exported.
Pulses 253 TMT $288 million	**1. USA - 24%** 2. Canada -18% 3. Argentina- 17%	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 24 TMT $234 million	**1.USA-77%** 2. Germany - 9% 3. Iran - 5%	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.
Food Preparations N/A* Value: $1.4 bn	1. Netherlands-19% 2.France-18% 3.Germany–16% **11. USA – 2%**	Other major neighbor suppliers offer high quality products at competitive prices.	Strong domestic food industry.

***Total not available due to different reporting units**

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Table 3. Spain Agricultural and Food Import Statistics

AGRICULTURAL PRODUCTS IMPORTS	2022	2023	2024	2025	2026*
Total Agricultural and Related Products	**63,814**	**64,910**	**65,558**	**72,922**	**73,000**
Total U.S. Agricultural and Related Products	2,167	2,235	2,239	2,852	2,900
Total Agricultural Products	**49,155**	**51,770**	**53,086**	**58,529**	**59,000**
Total U.S. Agricultural Products	1,979	2,023	2,067	2,694	2,700
Total Consumer-Oriented Products	**23,667**	**26,149**	**28,797**	**34,039**	**35,000**
Total U.S. Consumer-Oriented Products	839	691	747	982	1,000
Total Seafood Products	**9,637**	**9,225**	**9,507**	**10,825**	**11,000**
Total U.S. Seafood Products	95	99	81	81	85

Source: Trade Data Monitor LLC; Unit: $ Million* Estimate

Best High-Value, Consumer-Oriented Product Prospects Category

Product Category	Total Spain Imports 2025 [Million USD]	Total Spain Imports from the USA 2025 [Million USD]	% Change from 2024	% Change from 2020	Market Attractiveness for USA
Pulses	$289	$70	+18.5%	+45.8%	Part of the traditional diet. Increased interest in alternative protein sources.
Tree Nuts	$1,550	$761	+45%	+6.5%	The USA is a key exporter of almonds, pistachios, and walnuts to Spain. Strong demand for nuts, for snacking and ingredient.

Fish and Seafood	$10,825	$86	+0.24%	-5%	Good prospects for high-value products.
Whiskey	$437	$73	-3%	+35.1%	The USA is the second-largest exporter of whiskies to Spain, after the UK.

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

Ministry of Agriculture, Fisheries and Food

Spanish Food Safety and Nutrition Agency

Attachments:

No Attachments