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Prepared By: Arantxa Medina

Approved By: Evgenia Ustinova

Report Highlights:

Spain's economy grew almost three percent in 2025 — roughly double the Eurozone average — reinforcing its position as the fourth-largest economy in the Eurozone and a key European food hub. A consumer base of nearly 49 million people, boosted by a record 100 million annual tourists, continues to drive strong demand for imported consumer-oriented goods, seafood, and food ingredients. Yet since early 2026, rising prices and tighter household budgets have reshaped shopping patterns and redistributed market share: Mercadona still leads sales, but discount and regional chains are gaining ground as consumers split purchases across retailers and chase promotions. Private-label products now exceed half the shopping basket by value—Europe's second highest share – as retailers pivot toward value-for-money positioning, loyalty-driven personalization, and efficiency – from AI-enabled operations to streamlined “short assortment” formats that favor private-label and health-oriented products over broader variety.

Market Fact Sheet: Spain

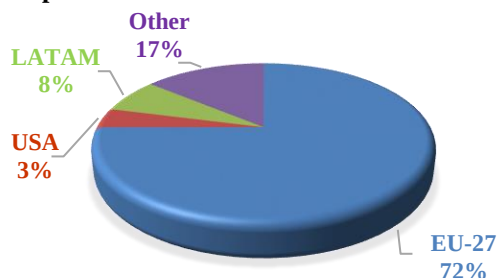
Executive Summary

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. This dynamism is amplified by Spain's substantial consumer base — nearly 49 million residents — further supplemented by a record-breaking influx of almost 100 million tourists annually. In 2025, Spain's total imports of agricultural and related products reached \$73 billion, up almost 11 percent 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. Hence, U.S. exporters already exporting to other EU member states will likely meet most of the Spanish import requirements.

Total Imports of Consumer-Oriented Products 2025



Food Processing Industry

Spain has one of the most competitive food processing industries in Europe. Spain's food-processing sector is focused on the quality, safety, and traceability – as well as innovation, which presents opportunities for U.S. food ingredients.

Food Retail Industry

The competitive retail landscape remains highly fragmented in 2026. Within grocery store-based retailing, Mercadona retains the leading position, followed by Carrefour. Uncertain economic conditions and high food prices are expected to persist in 2026, leading consumers to focus on store brand products, essential items, and to reduce impulse purchases, forcing retailers to maximize their efficiency to retain margins.

Spain Quick Facts CY2025

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 2025

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) 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 (real, est): \$35,285

Sources: FIAB, Alimarket, TDM, GATS, Eurostat

Strengths/Weaknesses/Opportunities/Challenges

SWOT ANALYSIS

Strengths	Weaknesses
Dynamic economy with large consumer and tourist markets.	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 1. MARKET SUMMARY

Spain is the fourth largest economy in the Eurozone, growing by 2.8 percent in 2025 - roughly double the overall Eurozone average. Spain boasts a massive consumer market, with a population of almost 49 million people- supplemented by a record-breaking influx of nearly 100 million tourists annually – which drives a substantial demand for imported consumer-oriented goods, seafood, and food ingredients. According to the Ministry of Agriculture, Fisheries and Food, average per capita grocery spending in 2025 reached \$3,269, up 3.4 percent compared to 2024. Overall, in 2025, Spain imported \$73.2 billion worth of agricultural and related products.

Nevertheless, since early 2026, consumer prices have steadily crept up – due to the ongoing trade and geopolitical tensions - and as a result Spanish households have altered their grocery shopping habits, leading to shifts in market share among major supermarket chains. According to Worldpanel by Numerator's (formerly Kantar) analysis of the first eight months of the year, Mercadona remains the clear leader with just over 27 percent of total sales. This market share equals its five closest competitors combined: Carrefour, Lidl, Eroski, Dia, and Consum. Mercadona's growth has stalled at just 0.1 points year-on-year, and its shopper share fell 0.8 points to 90.5 percent, the steepest drop of any chain. Still, nine in ten Spanish consumers shop at Mercadona at least occasionally, far ahead of Lidl (62.4 percent) and Carrefour (56.7 percent).

Lidl, Dia, and Consum had the strongest gains: Lidl added 4 points of market share, while Dia and Consum each rose 3 percent. In the supermarket sector, regional chains are the major driver of the sector's growth. Their prominence is a very distinctive feature of Spanish distribution and Consum is part of this category. Regional chains overall reached 18.8 percent value share, up 0.4 points, though three-quarters of that growth came from Consum alone.

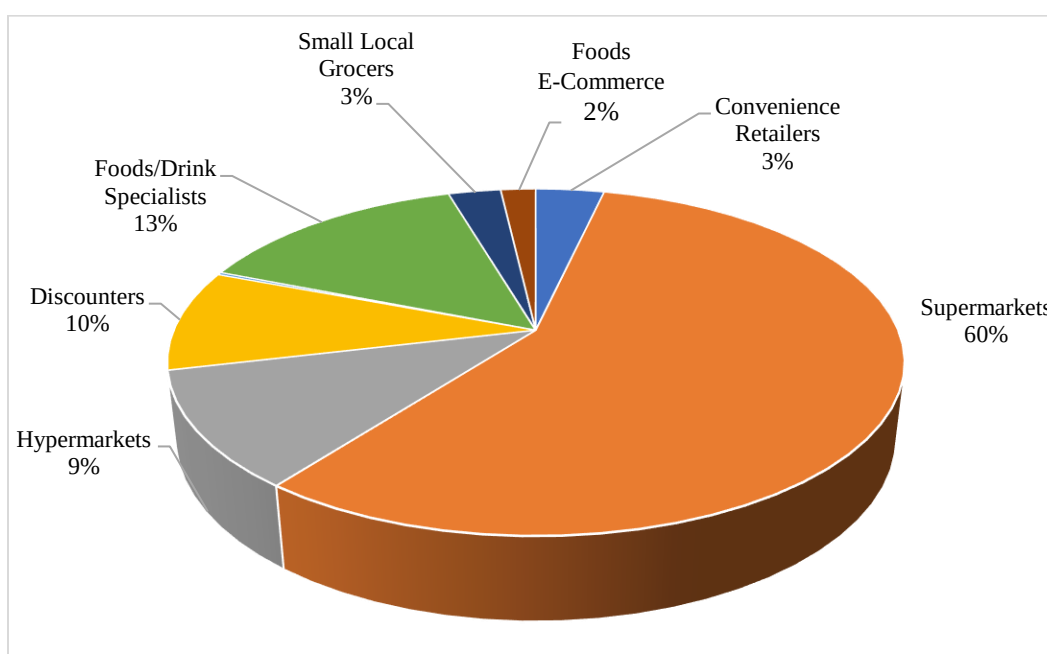
Two trends are driving the shift: shoppers are spreading purchases across more stores, while also seeking out in-store promotions. Dia grew its shopper base and boosted annual visits by 12.7 percent, pulling customers from Mercadona, specialist retailers, and regional chains. Meanwhile, Lidl is increasingly seen as a one-stop shop rather than just a discount option, thanks to expanded private-label offerings and more discounts, helping it gain ground in large baskets and with families, traditionally Mercadona's stronghold.

Spain is the fastest-growing market in Europe for private-label products. Over the past year, these products' value market share reached 52 percent of the Spanish shopping basket by value—second only to the Netherlands (55 percent), according to Circana, cited in Aldi's Private Label Study in Spain. Looking ahead, growth will likely come from further basket diversification: almost 58 percent of shopping trips already happen outside a customer's main store. Private-label brands also continue to grow, driven by "short assortment" stores that minimize product variety in favor of their own brands.

Table 1. Advantages and Challenges of the Spanish Food Retail Market

Advantages	Challenges
Spanish consumers are increasingly open to new products. The United States is a favorite destination for Spanish travelers outside the EU, boosting popularity and cravings for American food products.	High import tariffs and import regulations impose a price disadvantage on non-EU based companies. Competitive disadvantage exists with direct competitors with signed Free Trade Agreements, such as Canada, Mexico and MERCOSUR.
U.S. products have a good reputation with importers and retailers for consistent quality and supply reliability. U.S. suppliers are known for being serious business partners.	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 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.
New generations of consumers demand healthy, innovate, sustainable products, creating new opportunities.	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.

Figure 1. Spain Retail Sales by Channel 2025 (Value)



Source: Euromonitor

SECTION 2. ROAD MAP FOR MARKET ENTRY

Business Customs

U.S. companies seeking to export to Spain are advised to conduct thorough research; [FAS GAIN Reports](#) are a good source for country specific information. 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 contacts 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. We also encourage you to contact us for clarification on specific questions, for example, for information on export certificates. Contact information is provided at the end of this report.

Spain's sales channels range from traditional distribution methods – wholesalers that sell to small retail shops that, in turn, sell to the public – to large multinational supermarkets and retail stores. However, personal relationships are still important, especially within smaller organizations. Nowadays, the level of tolerance for virtual meetings and discussions has increased, but culturally, there is still no substitute for face-to-face meetings with business representatives to enter the market. The decision-making process within a company may differ 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 company will likely expect the U.S. firm to translate commercial brochures, technical specifications, and other relevant materials into Spanish. Decision makers at Spanish firms may speak English, but paperwork is normally completed in Spanish.

Most agents, distributors, foreign subsidiaries, and government-controlled entities that make up the economic power block of the country operate in two hubs: Madrid and Barcelona. Companies 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.

Food Standards and Regulations

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

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 US have the following agreements and arrangements in place:

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

Importers represent the first link in the domestic sales chain and have the primary responsibility with the Spanish government for imported food products once they enter Spanish territory. Therefore, the Spanish agent/importer should guide the U.S. exporter through the entire process of marketing a food or agricultural product in Spain. Most food products require an Import Certificate issued by the competent authority.

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

Country Language Labeling Requirements

The Standard U.S. label does not comply with the EU's labeling requirements. Detailed information on labeling requirements that apply in the EU as of 2016, available in the [GAIN USEU report on New EU Food Labeling Rules](#). This information can be supplemented by [GAIN report How to Comply with the EU's New Food Labeling Rules](#). In addition, the Spanish different associations have published a [guidance document](#) for compliance.

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.

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 continents. The most important trade shows are:

USDA-Endorsed Trade Shows

[Seafood Expo Global](#)

April 20-22, 2027

Barcelona, Spain

Other Relevant (Non-Endorsed) Trade Shows

CONXEMAR	October 6-8, 2026	Vigo, Spain
Fruit Attraction	October 6-8, 2026	Madrid, Spain
ANUGA Select Iberica	February 16-18, 2027	Madrid, Spain
Salon de Gourmets	April 26-29, 2027	Madrid, Spain
Alimentaria (bi-annual)	March 20-23, 2028	Barcelona, Spain

U.S. exporters can access additional support by reaching out to their State Regional Trade Group (SRTG), Commodity Cooperator Group, or state Department of Agriculture.

State Regional Trade Groups (SRTGs) are non-profit organizations dedicated to helping U.S. food producers and processors expand into international markets. Funded by USDA's FAS and private sector contributions, SRTGs conduct promotional activities to boost exports of U.S. high-value food and agricultural products. To find the SRTG serving your state, visit <https://www.fas.usda.gov/topics/getting-started/state-regional-trade-groups>.

The U.S. Agricultural Export Development Council (USAEDC) represents U.S. commodity trade associations, SRTGs, and other organizations focused on advancing U.S. agricultural exports. For an overview of Commodity Cooperator Groups and their activities, visit <https://usaedc.org/>. These groups frequently organize reverse trade missions, often tied to trade shows or events, providing U.S. food ingredient suppliers with opportunities to connect with international buyers.

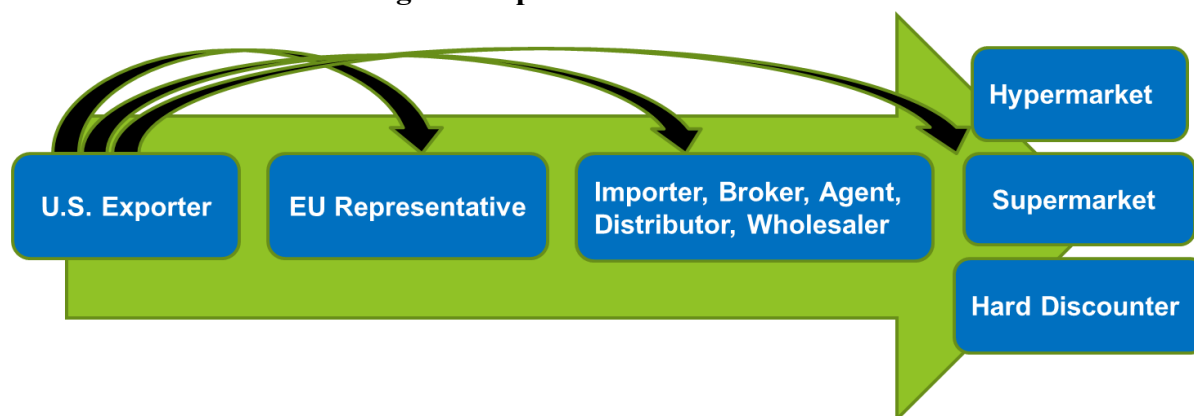
Market Structure

Mercadona holds the top position in Spain's grocery retail sector, with sales almost three times that of its second closest competitor, Carrefour. Beyond its market position, Mercadona is considered a cultural phenomenon in Spain, known for its comprehensive offerings of Spanish foods and its private label brand, Hacendado. Private label brands are very popular in Spain, driven by consumer focus on price and value. Spanish households allocate 52 percent of their shopping budget in private label products.

While Mercadona remains the retail market leader, other retailers like Carrefour and the discount chain Lidl are also significant players in the Spanish market. Carrefour's market share remains significantly behind Mercadona's, and discounter Lidl is a fast-growing chain.

For more information on the Spanish market, please consult additional sector reports for Spain at [FAS GAIN Home](#).

Figure 2. Spain's Market Structure



Source: FAS Madrid

Spain's Top Retailers

Retail Organization	Ownership	Sales 2025 (\$ Million)*
<u>MERCADONA</u>	Spanish	46,100
<u>GRUPO CARREFOUR</u>	French	13,000
<u>LIDL SUPERMERCADOS</u>	German	8,500
<u>DIA</u>	French	7,000
<u>GRUPO EROSKI</u>	French	6,500
<u>ALCAMPO</u>	Spanish	5,500
<u>CONSUM, S. COOP.</u>	Spanish	5,100
<u>EL CORTE INGLES ALIMENTACION</u>	Spanish	3,500
<u>BON PREU, S.A.</u>	Spanish	3,000
<u>AHORRAMAS</u>	Spanish	2,500

Source: Alimarket; *Estimate

SECTION 3. COMPETITION

Spain's main trading partner is the EU-27 driven by proximity and price. Notably, the lack of trade tariffs, trade barriers, and other restrictions often make European goods more attractive and competitive, particularly for price sensitive goods. The U.S. industry's advantages include a good reputation for consistent quality and stable supply.

Product Category (2025; TMT; million USD)	Major Suppliers 2025 (in value percentage)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Frozen Fish Quantity: 283 Value: \$837	1.Portugal – 14% 2. Morocco – 8% 3. S. Africa – 7%	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: 103 Value: \$566	1.USA – 79% 2.Portugal – 12% 3.Germany – 3%	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: 253 Value: \$289	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	Spain is a traditional consumer of pulses and a net importer, as local production is insufficient to fulfill internal

		supplier.	demand.
Pistachios Quantity: 24 Value: \$235	1. USA – 77% 2. Germany – 9% 3. Iran - 5%	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.
Peanuts Quantity: 59 Value: \$100	1. Argentina- 34% 2. China – 34% 3. USA – 13%	Other major suppliers offer good quality products at competitive prices. China is increasingly gaining market share.	Imports from the world have increased considerably in the last five years. Demand and consumption continue to be strong.
Distilled Spirits Value: \$1,048	1. U.K. - 30% 2. USA - 12% 3. Netherlands - 10%	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 ([TDM](#))

SECTION 4. BEST PRODUCT PROSPECTS

Table 3. Agricultural and Food Import Statistics

AGRICULTURAL PRODUCTS IMPORTS (\$ Million)	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	34,000	35,000
Total U.S. Consumer-Oriented Products	839	692	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	90	85

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 -- 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 5. 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