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Prepared By: Arantxa Medina

Approved By: Evgenia Ustinova

Report Highlights:

The hospitality industry in Spain continues to grow, though at a more moderate rate than in previous two years, fueled by domestic consumption and inbound tourism. Spain is on track to achieve a record-breaking number of tourists in 2025, which solidifies tourism as a key driver of the Spanish economy. In 2025, the sector continues to stand out through its adaptation to emerging consumer trends such as personalization, sustainability, and digitalization. While moderate growth and high turnover rates challenge some foodservice segments, the industry is driven by organized hospitality, fast food formats, brunch and afternoon social experiences, and increased investment in high-end gastronomy. Health, sustainability, and innovation remain dominant trends, though inflation poses ongoing challenges. These dynamics create excellent opportunities for U.S. food-ingredient and food-product exporters to tap into Spain’s thriving HRI sector.

Market Fact Sheet: Spain

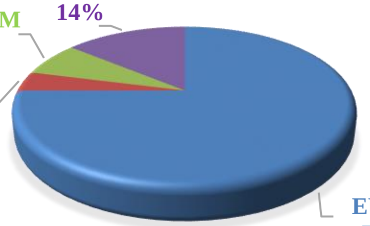
Executive Summary

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 one 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 competitive retail landscape remains highly fragmented in 2025. 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 in 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 & Coco 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	High inflation and public debt

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

SECTION I. MARKET SUMMARY

Economic Trends

The Spanish economy in 2025 is characterized by robust growth, with the latest forecasts from the Spanish government and European Commission converging on a 2.9 percent GDP expansion. This rate makes Spain one of the fastest-growing advanced economies, well above the average for the EU (1.4 percent). Key drivers are strong domestic demand - private consumption and investment, a booming tourism sector, the impact of EU recovery funds, and high immigration levels. While the outlook is positive, the Spanish economy faces some challenges such as the moderation of recent growth drivers, the impact of global economic headwinds and global trade dynamics, and a weak European economy.

Spain is once again breaking tourism records in 2025, solidifying its position as a leading European destination despite local protests and climate challenges. International tourist arrivals and tourist spending in Spain continues their positive trends. Spain received 66.8 million international tourists during the first eight months of 2025, a 3.9 percent increase from the same period last year. The summer months of July and August alone attracted 22.3 million tourists, breaking the previous summer record.

Tourism in Spain is expected to grow positively in 2025, but the pace of growth is slowing compared to previous years, making the goal of reaching 100 million tourists increasingly unlikely. Currently, estimates project a growth around 2.7-2.8 percent, driven by increased spending but tempered by challenges such as rising prices and global economic uncertainty.

Table 1. Advantages and Challenges of the Spanish HRI 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 powerful tourist sector demands foreign products and ingredients to satisfy foreign visitors’ needs, creating opportunities in the hotel and restaurant sectors.	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.	Adjustments to the overall domestic and international economy (inflation, Ukraine conflict, drought), tourism, and consumer habits.
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 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 our 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.

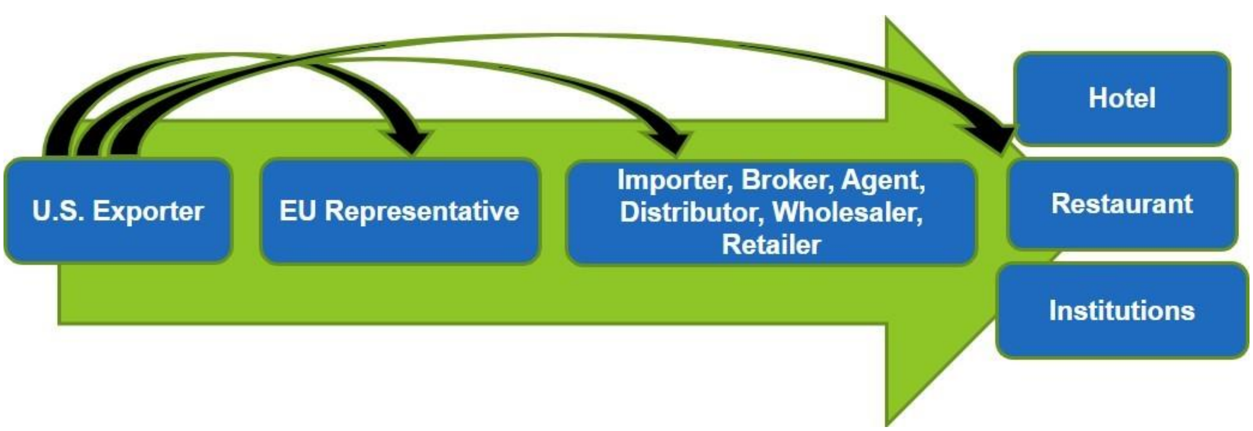
Trade Shows

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. The most important trade shows related to the HRI sector

Table 2. Upcoming International Trade Shows in the HRI Sector in Spain

Trade Show	Date	Description
Madrid Fusión	January 26, 2026 Madrid	An international gastronomy summit that gathers top chefs from around the world.
HIP – Hospitality Innovation Planet HRI Professional Expo:	February 16-18, 2026 Madrid	HIP is a major innovation event for the hospitality industry, showcasing the latest products and solutions.
Alimentaria	March 23-26, 2026 Barcelona	Leading food, beverage and gastronomy show in Spain.
Hostelco	March 23-26, 2026 Barcelona	A food and beverages fair that showcases a wide range of offerings in the food technology sector.
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.

Market Structure



The HRI supply channels are diverse and serve small and large customers with different needs. Beverage suppliers are very specialized since most beverage consumption takes place in bars, cafeterias, and restaurants. The most important HRI sector suppliers are:

- Importers, Wholesalers, Specialists: Importers and wholesalers supply directly to the HRI sector, particularly the restaurant and hotel chains.
- Commercial distributors: Distributors play an important role in the supply of food and beverages needs of many small and diverse food service providers.
- Wholesale Markets (*Mercas*): Buyers purchase most perishable products at the wholesale market. The HRI sector is, by tradition, a net consumer of fresh produce.

- Cash & Carry: Open only to businesses and offering very competitive prices, they supply a wide variety of food products, from perishable to non-perishable, domestic and imported. Some cash-and-carry chains have developed outlets that only service the HRI sector.
- Supermarkets and Hypermarkets: Very important to the HRI sector when considering “last minute” purchases and relevant due to their convenient locations.
- Local Producers: Some players in the HRI sector buy directly from local producers, particularly if they are located close to major markets. The food service sector has a tradition of using fresh produce in their daily menus. Many restaurants and hotels, particularly along the coasts, buy directly from local producers and fishermen.

Sub-Sector Profiles

Hotels

According to the National Institute of Statistics (INE), the country welcomed 66.8 million arrivals that were recorded in the first eight months of the year, 3.9 percent more than in the same period in 2024. Tourist spending surpassed $107 billion—a 7.1 percent increase compared to 2024. These figures highlight Spain’s continued appeal to travelers and its growing economic gains from the tourism sector.

Spain’s hotel industry is experiencing significant growth, fueled by the opening of new hotels and a surge in international tourism. Despite challenges such as economic uncertainty and rising costs, the market is expanding, particularly in the luxury and high-end segments. The recovery of international business travel and a growing preference for more relaxed travel experiences are key drivers of this expansion. The Spanish tourism sector remains a key element of the country’s economic development, with the hospitality market continuing to evolve in response to changing customer interests.

Table 3. Spain – Main Hotel Chains – 2025

Company	Total Sales ($ Million)*
RIU Hotels & Resorts-RIUSA II, S.A.	$4,500
Melia Hotels International, S.A.	$3,500
Minor Hotels Europe & Americas, S.A. - Grupo	$2,800
Barcelo Gestión Hotelera, S.L.	$1,800
Marriott (España)	$1,500

Source: Alimarket; * Estimate

The extraordinary tourist numbers positively impacted foodservice outlets in lodging and travel locations. In response to this increased demand, hotel chains have taken the opportunity to diversify their revenue by improving their food service offers. Beyond catering to hotel guests, many hotels sought to attract external customers by introducing attractive menus, set menus for special occasions, and collaborations with renowned chefs. To further maximize sales opportunities, numerous hotels also expanded their takeaway and delivery services, targeting the growing number of consumers who prefer dining at home.

Restaurants

The restaurant sector continues its recovery after being one of the sectors most affected by the coronavirus crisis and it expects to exceed the figures registered before the pandemic in 2024. Though final numbers are not published yet, the hospitality sector in Spain expects this year to be a record one in both turnover and employment, favored by the strength of international tourism with record breaking number of visitors and increased spending.

In Spain, the consumer foodservice industry is undergoing a dynamic shift. Immediate consumption outside the home accounts for 23 percent of food spending in Spain, driven by the growing role of retail in offering ready-to-eat meals. Supermarkets, gas stations, and convenience stores are reshaping the foodservice landscape, competing directly with traditional restaurants and fast-food chains. In Spain, Mercadona leads the ready-to-eat segment, surpassing even major restaurant chains like Burger King. The supermarket chain has even set up a specific area equipped with microwaves for customers to heat and have their meals. Retail's success lies in its convenience, affordability, and appeal to consumers seeking quick, homemade-style meals.

This shift challenges traditional dining formats, including Spain's iconic "*menu del día*" (“menu of the day” - traditional fixed-price meal commonly offered at restaurants throughout Spain) as competition intensifies across all foodservice channels. Retailers are also innovating with in-store restaurant brands and "shop-in-shop" models, offering complete dining experiences. To stay competitive, businesses must understand consumer preferences and adapt to evolving trends in convenience, value, and experience.

While independent restaurants still dominate consumer foodservice value sales in Spain, they are facing increasing competition from new and modern establishments. These trends are likely to gradually erode the share of traditional independent foodservice outlets, with a corresponding growth in chain establishments owned by large companies and franchises. One of the main advantages of these brands is their ability to quickly adapt to new trends due to their international exposure and attract new customers through effective marketing and strong brand recognition.

Table 4. Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024

% Value	2019	2020	2021	2022	2023	2024
Chained Foodservice	10.1	11.2	11.1	11.2	11.4	11.8
Independent Foodservice	89.9	88.8	88.9	88.8	88.6	88.2
Total	100	100	100	100	100	100

Source: Euromonitor International

Despite this, independent operators could profit from the growing demand for traditional food, locally sourced ingredients, and more sustainable options. There is increasing interest in the authenticity of foodservice establishments and the food they offer, with younger consumers especially seeking unique and innovative culinary experiences. This trend is expected to benefit independent foodservice outlets, which are perceived as providing a more genuine experience compared to the more standardized options typically found in chain restaurants within shopping centers or travel hubs.

Table 5. Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024

Outlet Type	Independent	Chain	Total
Cafés/Bars	125,239	2,763	128,002
Full-Service Restaurants	58,857	2,417	61,274
Limited-Service Restaurants	4,993	11,204	16,197

Outlet Type	Independent	Chain	Total
Self-Service Cafeterias	20	365	385
Street Stalls/Kiosks	1,990	270	2,260
Consumer Foodservice by Type	**191,099**	**17,019**	**208,118**

Source: Euromonitor International

Health, sustainability, and innovation are the biggest trends within the sector. In this sense, Spanish consumers are becoming more concerned about the origin of the ingredients they consume and are progressively placing more importance on the local market. Recent studies have shown that Spanish consumers are willing to pay more for local produce.

Table 6. Spain – Leading Food Chains – 2025

Company	Total Sales ($ Million)*
McDonald's España	$1,900
Restaurant Brands Iberia, S.L.	$1,800
Alsea Iberia-Food Service Project, S.L.	$1,500
Food Delivery Brands Group, S.A.	$1,000
KFC Restaurants Spain, S.L.	$400

Source: Alimarket; * Estimate

Institutional

The institutional catering sector in Spain reached $4.4 billion in 2024, recovering pre-pandemic revenue levels and strengthening its role as a key player in the food service industry. The sociosanitary and educational sectors remain the primary drivers, accounting for 77 percent of total revenue, with $1.8 billion (43 percent) from sociosanitary services and $1.6 billion (34 percent) from education. Other segments include corporate catering (17 percent) and leisure/events (6 percent). The sector serves 4.1 million meals daily to over 8.7 million consumers.

Larger companies dominate institutional food service in Spain, with the top five companies accounting for more than 40 percent of total sales. In addition, there are hundreds of small local companies providing catering and events services. Large institutional food service companies are price sensitive, importing directly, and/or buying products, particularly fresh produce, from local suppliers.

Companies in this category face a very competitive market marked by rising operational and production costs and price pressure. This situation has forced companies to look for different strategies to maintain margins. In this sense, many of them had to renegotiate their contracts with suppliers and customers. Experts in the sector highlight the fact that this is a market that coexists in a challenging and uncertain context, with less loyal customers that will force them to take on challenges to avoid a decline in profitability.

Table 7. Spain – Leading Institutional Food Sector Companies – 2025

Company	Total Sales ($ Million)*
Serunión, S.A.	$650
Eurest Colectividades, S.L.	$450
Mediterranea de Catering, S.L. (Grupo)	$380
Aramark Servicios de Catering, S.L.	$360
Auzo Lagun, S.C.	$300

Source: Alimarket; * Estimate

SECTION III. COMPETITION

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

Table 8. Products Facing Competition in the Spanish Market

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 s: 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: TDM

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Table 8. 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: TDM Inc; * Estimate

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 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 – Other 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 – pathogen reduction treatments) -- Processed food (with GMO ingredients)

SECTION V. KEY CONTACT 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