



Euromonitor
International

Full-Service Restaurants in Spain

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Tourism, digitalisation and global flavours drive growth for full-service restaurants in Spain

INDUSTRY PERFORMANCE

Tourism supports growth in Spain's full-service restaurants despite ongoing cost pressures

Digital engagement and tailored offerings strengthen customer retention in full-service restaurants

Full-service restaurants increasingly embrace delivery to counter economic pressures

WHAT'S NEXT?

Tourism and evolving tastes are set to drive value growth in Spain's full-service restaurants

Digitalisation and AI adoption are set to drive foodservice value growth

Sustainability initiatives will strengthen competitiveness in Spain's full-service restaurants

COMPETITIVE LANDSCAPE

Alsea Iberia Foodservice Project SL retains its lead while launching experiential marketing initiatives

Experiential dining and strategic expansion drive growth among emerging full-service players

Authenticity and community engagement sustain the leadership of independent full-service restaurants

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EXECUTIVE SUMMARY

Easing inflation, tourism and digital innovation support growth in consumer foodservice in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Stabilising inflation, strong tourism and economic recovery support growth in 2025

Digital platforms and loyalty integration accelerate the expansion of delivery in Spain

Experiential formats and event-based dining strengthen consumer engagement

WHAT'S NEXT?

Tourism, easing inflation and rising mobility are set to support foodservice growth in Spain

Health and functional nutrition are expected to reshape menu strategies

Sustainability strategies will be transforming operations and menu development

COMPETITIVE LANDSCAPE

Leading global chains strengthen positions through expansion, digitalisation and convenience-led formats

Experiential dining drives dynamic growth for Hard Rock Café in Spain

Network expansion and flagship investments reinforce Starbucks' leadership in specialist coffee shops

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Digital platforms and loyalty programmes drive consumer engagement and operational efficiency

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