



# Pulses in Spain

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Table of Contents

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Packaging expectations reshape pulses as climate risks intensify

### INDUSTRY PERFORMANCE

Pulses remains resilient despite climate challenges, with heightened consumer focus on sustainable packaging

Private label continues to benefit from widespread cost consciousness among local consumers, intensifying competition with named brands

### WHAT'S NEXT?

High-protein profile ensures further growth for pulses in Spain, though convenience demand will accelerate shift towards processed alternatives

Tech advances to streamline production processes, while retail shifts are likely to favour discounters and e-commerce

Summary 1 - Major Processors of Pulses 2025

## CATEGORY DATA

Table 1 - Total Sales of Pulses by Category: Total Volume 2020-2025

Table 2 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Pulses by Category: Volume 2020-2025

Table 4 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Pulses by Category: Value 2020-2025

Table 6 - Retail Sales of Pulses by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030

Table 9 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030

Table 11 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030

Table 12 - Forecast Retail Sales of Pulses by Category: Value 2025-2030

Table 13 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

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### Fresh Food in Spain - Industry Overview

#### EXECUTIVE SUMMARY

Fresh food volumes struggle as drought and convenience pressures intensify

#### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Fresh food turns in marginal volume growth thanks partly to price hikes

Challenges persist in form of droughts and processed alternatives

#### WHAT'S NEXT?

Fresh foods to see only marginal rises in volume sales

Sugar will fall fastest, while tourism helps to sustain foodservice sales

#### CHANNELS

Supermarkets channel benefits from convenience, proximity and broad array

Retail e-commerce gains pace as players invest in omnichannel approach

#### MARKET DATA

Table 14 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 15 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 16 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 17 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 18 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 19 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 20 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 21 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 22 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 23 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 24 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 25 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 26 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 27 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

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## SOURCES

Summary 2 - Research Sources

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