

## **Spain Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

Market Report | 2024-02-17 | 194 pages | Mordor Intelligence

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### **Report description:**

The Spain Foodservice Market size is estimated at USD 145.58 billion in 2024, and is expected to reach USD 267.70 billion by 2029, growing at a CAGR of 12.96% during the forecast period (2024-2029).

The rising number of tourists, especially from the Asian continent is driving the latest development like menu innovations in Spain

- The cafes and bars segment dominates the Spanish foodservice market. The segment witnessed a growth of 46.52% in sales in 2022 compared to 2020. There is a higher market penetration of nightclubs, discos, and bars with live music concerts in Spain. The popularity of pubs is also growing with the rising number of tourists. In 2022, 30.2 million international tourists arrived in Spain. Thus, operators are focusing more on offering a diverse range of appetizers and imported alcohol and investing more in developing the ambiance.

- In the full-service restaurants segment, Asian restaurants dominate the market, owing to the rising number of Asian tourists, mainly from the Philippines, South Korea, and Japan. For instance, in 2022, 1.49 million tourists from Japan and 431,628 tourists each from the Philippines and South Korea visited Spain. Thus, large-scale operators offer Pan-Asian cuisine in fine-dining restaurant setups to encourage both locals and tourists.

- The quick service restaurant segment of the market was dominated by meat-based cuisines, which accounted for an estimated market share of 24.84% in 2022. Spain is the third-largest country in Europe with the highest meat consumption. For instance, in 2021, the per capita consumption of meat products amounted to 51 kg. Thus, a few QSRs, such as Telepizza, Burger King, and McDonald's, offer a range of meat-based products. The QSR market is anticipated to grow during the forecast period, anticipated to register a CAGR of 12.10%.

- The cloud kitchen segment witnessed significant growth post-pandemic as consumers preferred to make more online food

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orders, with a total count of 214 as of 2022. Due to low operating costs, a few operators have shifted toward virtual kitchens for offering selected takeaway foods.

## Spain Foodservice Market Trends

The number of cafes and bars in Spain is growing tremendously, driven by the demand for alcohol and gourmet coffee

- The number of cafes and bars in Spain experienced a YoY growth rate of 12.94% from 2020 to 2022. The Spanish population tends to invest more in alcoholic beverages, leading to frequent visits to bars. In 2021, the per capita expenditure in alcoholic beer was USD 27.49. The growing affinity for gourmet coffee has also prompted operators to expand their coffee chains in major cities.

- From 2020 to 2022, cloud kitchen outlets emerged as the fastest-growing segment. They are projected to register a notable CAGR of 9.43% during the forecast period. The effects of the pandemic have resulted in a surge in online food ordering, with a significant portion of the population in Spain, around 42%, spending money on ordering food through delivery services. As a result, many foodservice companies have begun creating virtual kitchens, intensifying competition in the cloud kitchen market.

- The number of quick service restaurants is also growing in response to consumer preferences for fast-food options such as pizza, hamburgers, sandwiches, and chicken-based snacks. In 2021, 23% of the population in Spain reported visiting different fast-food restaurants. Most quick service restaurants offer a limited menu selection that can be delivered quickly. The leading quick service restaurant chains in Spain with the highest number of stores include Telepizza, McDonald's, Pizza Hut, and Burger King. As of 2022, there were over 714 Telepizza outlets, 569 McDonald's, 765 Pizza Hut, and approximately 650 Burger King outlets. Consequently, the quick service restaurant outlets in Spain are expected to register a CAGR of 5.77% during the forecast period.

Asian cuisine gains popularity in Spain, driven by Indian, Japanese, and Thai cuisines

- The food industry in Spain has undergone significant changes to cater to customer demand and evolving consumer behavior. Quick service restaurants (QSRs) are experiencing growth in the country, particularly those offering non-traditional fast-food options such as Asian or Mexican cuisine. The growth of pizzerias can be attributed to new store openings and higher revenues per outlet as customers opt for more exotic varieties. Spanish consumers are seeking a touch of innovation and exoticism alongside convenience and speed. In 2022, the average prices for burgers, nachos, and pizza were USD 9.5, USD 11.5, and USD 10.8 per serving, respectively.

- The average order value for the cloud kitchen grew by 8.83% in 2022 compared to the previous year. The expansion of the cloud kitchen segment is being driven by an increase in the demand for online meal delivery. Consumers in Spain spend an average of around USD 24 on online food delivery per order. Online meal ordering and delivery services grew in popularity after the pandemic. Popular online delivery apps are Glovo, Uber Eats, Just Eat, and Deliveroo. Popular dishes offered by cloud kitchens in Spain were burgers, pizza, Pollo Mantequilla, and Indian curries priced at USD 9.5, USD 10.8, USD 13.5, and USD 12, respectively, per serving, in 2022. Asian cuisine holds a significant market share in Spain, with Indian, Japanese, and Thai cuisines being the most popular. Indian cuisine, in particular, is characterized by the Northern Indian approach, featuring flavorful curries and bread. The Indian population in Spain was approximately 70,000 as of 2021, leading to a wide range of full-service restaurants (FSRs)

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offering Indian cuisine. The prices of Indian curries and Chana Masala were around USD 12.2 and USD 8.9 per 300 g, respectively, in 2022.

## Spain Foodservice Industry Overview

The Spain Foodservice Market is fragmented, with the top five companies occupying 1.06%. The major players in this market are Alsea SAB de CV, AmRest Holdings SE, McDonald's Corporation, Restaurant Brands Iberia and Areas SAU (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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