

# Consumer Foodservice in Spain

February 2024

Table of Contents

## Consumer Foodservice in Spain

### EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong recovery of bars/pubs in Spain thanks to a return to dining out and socialising in 2023

Fierce competition from full-service restaurants and limited-service restaurants leads bars/pubs to seek new ways of attracting customers

Enrique Tomás looking for new opportunities in travel locations

#### PROSPECTS AND OPPORTUNITIES

Independent bars/pubs are expected to face ongoing challenges due to changes in consumer behaviour

Reinvention and expansion likely as players look to bounce back from the pandemic

More consumers will order home delivery and takeaway online in the years ahead

### CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

## Full-Service Restaurants in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Return to dining outside of the home benefits Spanish full-service restaurants in 2023

Staff shortages continue to present challenges for full-service restaurants post-pandemic

Full-service restaurants in central city locations benefit from a recovery in footfall

#### PROSPECTS AND OPPORTUNITIES

Digitalisation is set to continue apace of the forecast period, supported by AI technology

Zero waste and sustainability are set to gather traction in the years ahead

Ghost kitchens present growth opportunities for full-service restaurants over the forecast period

#### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Limited-Service Restaurants in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fish and chicken are on the menu as new players expand their presence in limited-service restaurants in Spain in 2023

Convenience stores' limited-service restaurants grow due to recovery in travel

Slower growth in delivery impacted sales through limited-service restaurants in 2023

#### PROSPECTS AND OPPORTUNITIES

Petrol companies exploring new options for food service

Sustainability concerns and health consciousness will shape category trends in the years ahead

Popeyes set to see healthy expansion while consumers seek new taste experiences

Digitalisation and ghost kitchens could present new opportunities for limited-service restaurants

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

- Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
- Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Self-Service Cafeterias in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Return of travel and retail supports the growth of self-service cafeterias in Spain in 2023
- Chained self-service cafeterias continue to dominate self-service cafeterias at the expense of independents
- Players include more healthy eating options and Areas SA expand its presence in Spain

#### PROSPECTS AND OPPORTUNITIES

- Oil companies set to test the waters by launching self-service cafeterias in petrol stations
- Self-service cafeterias' growth will be dependent on retail and travel in the years ahead
- Scope for category growth over the forecast period via the development of delivery services

### CATEGORY DATA

- Table 56 - Self-Service Cafeterias: Units/Outlets 2018-2023
- Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
- Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
- Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
- Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
- Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
- Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023
- Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023
- Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028
- Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
- Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028
- Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
- Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028
- Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

## Street Stalls/Kiosks in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Street stalls/kiosks in Spain are increasingly using food trucks to increase brand awareness
- Seasonality remains a key concern for street stalls/kiosks category in 2023
- Foodservice operators turn to street stalls/kiosks as a viable method for boosting sales

#### PROSPECTS AND OPPORTUNITIES.

- Growth in street stalls/kiosks is set to derive from the popularisation of food trucks
- Rising rent and high property prices in large Spanish cities could benefit street stalls/kiosks in the years ahead

A return to hectic lifestyles presents opportunities for street stalls/kiosks over the forecast period

## CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

## Consumer Foodservice By Location in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

A return to pre-pandemic value sales for consumer foodservice by location in Spain in 2023

IKEA restaurant and El Corte Inglés exploit resurgent demand with combined offers of foodservice and retail

Travel and lodging locations see the strongest growth, benefiting from domestic and foreign tourism, post-pandemic

#### PROSPECTS AND OPPORTUNITIES

Standalone is set to continue to dominate consumer foodservice by location sales over the forecast period, but ghost kitchens and delivery services offer scope for growth

Petrol companies are exploring new options for food service as they seek to diversify their offerings

Travel and retail are set to benefit from an increase in footfall over the forecast period

## CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 90 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 91 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 92 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 93 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 94 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 95 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 96 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 97 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 98 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 99 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 100 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 101 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 102 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 103 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 104 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023  
Table 105 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023  
Table 106 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023  
Table 107 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023  
Table 108 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023  
Table 109 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023  
Table 110 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023  
Table 111 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023  
Table 112 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023  
Table 113 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023  
Table 114 - Consumer Foodservice through Travel: Units/Outlets 2018-2023  
Table 115 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023  
Table 116 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023  
Table 117 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023  
Table 118 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023  
Table 119 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023  
Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028  
Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028  
Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028  
Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028  
Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028  
Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028  
Table 126 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028  
Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028  
Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028  
Table 129 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028  
Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028  
Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028  
Table 132 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028  
Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028  
Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028  
Table 135 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028  
Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028  
Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028  
Table 138 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028  
Table 139 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028  
Table 140 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028  
Table 141 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028  
Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028  
Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028  
Table 144 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028  
Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028  
Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028  
Table 147 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028  
Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028  
Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028  
Table 150 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028  
Table 151 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028  
Table 152 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028  
Table 153 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028  
Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028  
Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-foodservice-in-spain/report](http://www.euromonitor.com/consumer-foodservice-in-spain/report).