

Snacks in Spain

June 2024

Table of Contents

Snacks in Spain

EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

- Table 1 Sales of Snacks by Category: Volume 2019-2024
- Table 2 Sales of Snacks by Category: Value 2019-2024
- Table 3 Sales of Snacks by Category: % Volume Growth 2019-2024
- Table 4 Sales of Snacks by Category: % Value Growth 2019-2024
- Table 5 NBO Company Shares of Snacks: % Value 2020-2024
- Table 6 LBN Brand Shares of Snacks: % Value 2021-2024
- Table 7 Penetration of Private Label by Category: % Value 2019-2024
- Table 8 Distribution of Snacks by Format: % Value 2019-2024
- Table 9 Forecast Sales of Snacks by Category: Volume 2024-2029
- Table 10 Forecast Sales of Snacks by Category: Value 2024-2029
- Table 11 Forecast Sales of Snacks by Category: % Volume Growth 2024-2029
- Table 12 Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Producers focus on impulse and sharing formats to attract consumers

Players look for new ways to add value to their chocolate confectionery

Consumers switch from dark to milk and white chocolate as price pressures inform purchasing decisions

PROSPECTS AND OPPORTUNITIES

Category maturity likely to limit growth but opportunities still remain within chocolate confectionery

Other sweet snacks informing new product development

Health and wellness trend likely to inform new product development over the forecast period

CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2024

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasingly active lifestyles and a buoyant tourism industry support sales of gum in 2024 Perfetti Van Melle acquires Mondelez's gum while private label puts pressure on Mars

Functional claims help add value to chewing gum

PROSPECTS AND OPPORTUNITIES

Gum will need investment to fend off signs of category maturity

Trident expected to benefit from new launches while brands likely to focus on impulse sales to avoid competition from private label Putting the fun in bubble gum will be key to growth

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024

Table 26 - Sales of Gum by Category: Value 2019-2024

Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024

Table 28 - Sales of Gum by Category: % Value Growth 2019-2024

Table 29 - Sales of Gum by Flavour: Rankings 2019-2024

Table 30 - NBO Company Shares of Gum: % Value 2020-2024

Table 31 - LBN Brand Shares of Gum: % Value 2021-2024

Table 32 - Distribution of Gum by Format: % Value 2019-2024

Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029

Table 34 - Forecast Sales of Gum by Category: Value 2024-2029

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Pack sizes become a focus of new product development as Spain's economy comes under pressure

Haribo remains on top thanks to strong investment in marketing and new product development but rivals continue to gain share

Medicated confectionery attracting interest from those looking for natural solutions to minor health issues

PROSPECTS AND OPPORTUNITIES

Health and wellbeing claims likely to inform new product development over the forecast period Players likely to focus on delivering more sustainable solutions as environmental concerns grow New product development expected to target both children and adults

CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024

Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

- Table 44 Distribution of Sugar Confectionery by Format: % Value 2019-2024
- Table 45 Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029
- Table 46 Forecast Sales of Sugar Confectionery by Category: Value 2024-2029
- Table 47 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029
- Table 48 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Impulse sales on the up backed by increase in tourism while mini formats take retailers by storm

Plant-based ice cream back on form as economic pressures ease

Competition heating up in ice cream with new product development intensifying

PROSPECTS AND OPPORTUNITIES

Bright outlook for ice cream should encourage further investment in new product development and innovation

Plant-based ice cream set to see sales soar

Sustainable and healthier options likely to draw interest over the forecast period

CATEGORY DATA

- Table 49 Sales of Ice Cream by Category: Volume 2019-2024
- Table 50 Sales of Ice Cream by Category: Value 2019-2024
- Table 51 Sales of Ice Cream by Category: % Volume Growth 2019-2024
- Table 52 Sales of Ice Cream by Category: % Value Growth 2019-2024
- Table 53 Sales of Ice Cream by Leading Flavours: Rankings 2019-2024
- Table 54 Sales of Impulse Ice Cream by Format: % Value 2019-2024
- Table 55 NBO Company Shares of Ice Cream: % Value 2020-2024
- Table 56 LBN Brand Shares of Ice Cream: % Value 2021-2024
- Table 57 NBO Company Shares of Impulse Ice Cream: % Value 2020-2024
- Table 58 LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024
- Table 59 NBO Company Shares of Take-home Ice Cream: % Value 2020-2024
- Table 60 LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024
- Table 61 Distribution of Ice Cream by Format: % Value 2019-2024
- Table 62 Forecast Sales of Ice Cream by Category: Volume 2024-2029
- Table 63 Forecast Sales of Ice Cream by Category: Value 2024-2029
- Table 64 Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029
- Table 65 Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increase in social activities and thriving tourism industry boosts sales of savoury snacks

Hot and spicy savoury snacks inspiring new product development

PepsiCo forced to explore new opportunities as competition grows

PROSPECTS AND OPPORTUNITIES

Nuts, seeds and trail mixes set to remain a key growth driver and a focus on new product development

Healthier options and sustainable packaging likely to be seen in savoury biscuits

Ouegg brings new novelty to the market as players focus on health and innovation

CATEGORY DATA

- Summary 4 Other Savoury Snacks by Product Type: 2024
- Table 66 Sales of Savoury Snacks by Category: Volume 2019-2024
- Table 67 Sales of Savoury Snacks by Category: Value 2019-2024
- Table 68 Sales of Savoury Snacks by Category: % Volume Growth 2019-2024
- Table 69 Sales of Savoury Snacks by Category: % Value Growth 2019-2024
- Table 70 NBO Company Shares of Savoury Snacks: % Value 2020-2024
- Table 71 LBN Brand Shares of Savoury Snacks: % Value 2021-2024
- Table 72 Distribution of Savoury Snacks by Format: % Value 2019-2024
- Table 73 Forecast Sales of Savoury Snacks by Category: Volume 2024-2029
- Table 74 Forecast Sales of Savoury Snacks by Category: Value 2024-2029
- Table 75 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029
- Table 76 Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price stability boosts volume sales of sweet biscuits in 2024

Sales of snack bars benefiting from wider distribution and a focus on high protein diets

Focus on indulgence informing new product development

PROSPECTS AND OPPORTUNITIES

Players expected to focus on offering smaller pack sizes

Health claims set to influence new product development

Convenience and healthy eating trends likely to fuel demand for snack bars

CATEGORY DATA

- Table 77 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024
- Table 78 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024
- Table 79 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024
- Table 80 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024
- Table 81 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024
- Table 82 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024
- Table 83 NBO Company Shares of Sweet Biscuits: % Value 2020-2024
- Table 84 LBN Brand Shares of Sweet Biscuits: % Value 2021-2024
- Table 85 NBO Company Shares of Snack Bars: % Value 2020-2024
- Table 86 LBN Brand Shares of Snack Bars: % Value 2021-2024
- Table 87 NBO Company Shares of Fruit Snacks: % Value 2020-2024
- Table 88 LBN Brand Shares of Fruit Snacks: % Value 2021-2024
- Table 89 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024
- Table 90 Distribution of Sweet Biscuits by Format: % Value 2019-2024
- Table 91 Distribution of Snack Bars by Format: % Value 2019-2024
- Table 92 Distribution of Fruit Snacks by Format: % Value 2019-2024
- Table 93 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029
- Table 94 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029
- Table 95 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029
- Table 96 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

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/snacks-in-spain/report.