



Euromonitor  
International

# Health and Wellness in Spain

August 2024

Table of Contents

Health and Wellness in Spain

EXECUTIVE SUMMARY

- Health and wellness in focus
- Consumer weight trends
- Consumer diet trends
- Health-related deaths
- Blood pressure and cholesterol levels
- Diabetes prevalence

DISCLAIMER

HW Hot Drinks in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Organic health and wellness claim growing in hot drinks
- Natural is the leading health and wellness claim in hot drinks
- Increasing demand for functional hot drinks

PROSPECTS AND OPPORTUNITIES

- Concerns about sugar adversely affecting other hot drinks
- Natural to retain strength as claim in hot drinks, as consumers look to avoid artificial ingredients
- Growth of plant-based claim to be driven by expanding flexitarian population

CATEGORY DATA

- Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2023
- Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2023-2028
- Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2023-2028

HW Soft Drinks in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Sugary soft drinks linked with rise in childhood obesity in minds of consumers
- Natural is the leading health and wellness claim in soft drinks
- Growing interest in functional and fortified soft drinks

PROSPECTS AND OPPORTUNITIES

- Regulatory developments set to reinforce concerns about sugar
- Development of plant-based options
- Functional and fortified claims may help to address image problems

CATEGORY DATA

- Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2023
- Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 16 - Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2023-2028

Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2023-2028

## HW Snacks in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Lowering sugar content amongst the key priorities in sweet snacks

Gluten free is the leading claim, supported by growing awareness of food intolerance and general health trends amongst wider audience

Alignment of health and wellness and ethical concerns

### PROSPECTS AND OPPORTUNITIES

Fortification will continue to drive innovation in snacks

Growing range of vegan and plant-based options

Continued focus on sugar

### CATEGORY DATA

Table 19 - Sales of Snacks by Health and Wellness Type: Value 2019-2023

Table 20 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2023

Table 21 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2023

Table 22 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 23 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 24 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 25 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: Value 2023-2028

Table 27 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2023-2028

## HW Dairy Products and Alternatives in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Health and wellness dairy products and alternatives show resilience in 2023

Low fat is the leading health and wellness claim amid rising concerns about obesity

Return to growth for organic claim

### PROSPECTS AND OPPORTUNITIES

Dairy consumers seek higher protein content

Expanding range of products carrying plant-based claim

Diversification of fortified and functional products

### CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2023

Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2023

Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value

2019-20

**Table 33** - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

**Table 34** - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

**Table 35** - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2023-2028

**Table 36** - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2023-2028

## HW Cooking Ingredients and Meals in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong performance from vegan, vegetarian and plant-based claims

Obesity concerns support demand for health and wellness claims

Gluten free is largest health and wellness claim

#### PROSPECTS AND OPPORTUNITIES

Cost concerns to impact performance of natural and organic cooking ingredients and meals

Plant-based offers further growth potential due to rising flexitarian population in Spain

Changes to advertising regulations back on the agenda

#### CATEGORY DATA

**Table 37** - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2023

**Table 38** - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2023

**Table 39** - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

**Table 40** - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

**Table 41** - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

**Table 42** - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

**Table 43** - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

**Table 44** - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2023-2028

**Table 45** - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2023-2028

## HW Staple Foods in Spain

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sugar reduction is important in context of high rates of obesity in Spain

Gluten free is leading health and wellness claim as target audience expands

Growing concern about ultra-processed food and artificial additives

#### PROSPECTS AND OPPORTUNITIES

Consumers will continue to look for functionality from staple foods

Further development of plant-based offer

Health and wellness claims have potential to revitalise product image

#### CATEGORY DATA

**Table 46** - Sales of Staple Foods by Health and Wellness Type: Value 2019-2023

**Table 47** - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2023

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2023-2028

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % 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/health-and-wellness-in-spain/report](https://www.euromonitor.com/health-and-wellness-in-spain/report).