

2023 - 2025

Spain plant-based food retail market insights

Meat, milk and drinks, cheese,
yoghurt, and cream.



Photo: Sanygran

Executive summary

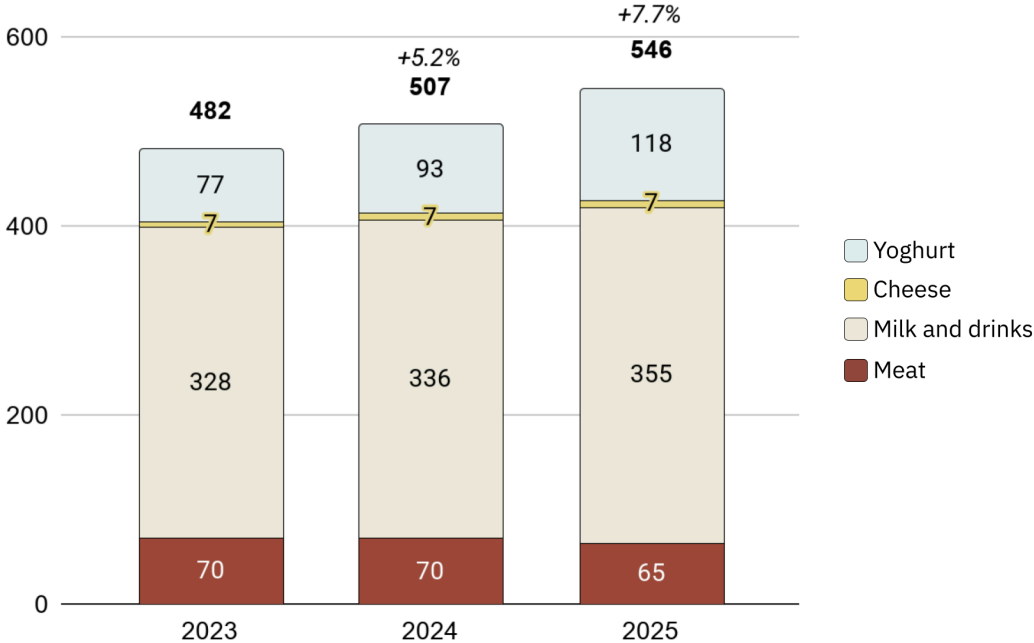
This report shows the trends in retail sales of four plant-based product categories (meat, milk and drinks, cheese and yoghurt) in Spain between 2023 and 2025, based on data from Circana. It also draws on household panel data from NIQ to provide insights into purchase patterns.

<p>The Spanish retail market across four categories of plant-based food was valued at €546 million in 2025.</p>	<p>The combined annual sales volume of four plant-based categories in Spain grew by 6.6% in 2025.</p>	<p>19.2% of households in Spain bought plant-based meat at least once during 2025.</p>	<p>47.6% of households in Spain bought plant-based milk and drinks at least once during 2025.</p>
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The Spanish plant-based market is growing steadily overall.

Sales across four plant-based categories (meat, milk and drinks, cheese and yoghurt) were worth €546 million in 2025, an increase of 7.7% compared to 2024 and an increase of 13.3% compared to 2023. Unit sales and sales volume also grew steadily, each rising 6.6% in 2025.

Plant-based food sales value by category in Spain, 2023-2025 (€ millions)



While relatively affordable private-label products accounted for a large chunk of the market, their sales volume growth rate slowed in 2025. Branded sales volume recovered in 2025 after a dip in 2024.

Branded plant-based sales volume fell 2.3% in 2024 and rose 6.6% in 2025 .	Private-label plant-based sales volume rose 13.4% in 2024 and 6.6% in 2025 .
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The most well-established plant-based category in Spain is plant-based milk and drinks, which in 2025 had the largest sales value by a considerable margin, the highest market share compared with animal-based products, ongoing steady growth in value and volume, and was purchased by nearly half of Spanish households. Although still more expensive than animal-based milk, it had the narrowest price gap of the four plant-based categories.

Plant-based milk and drinks in 2025			
€355 million annual sales value	10.4% of overall plant- and animal-based milk sales volume	5.8% year-on-year growth in sales volume	18% more expensive per litre than animal-based milk

However, there was mixed performance in other categories. Plant-based meat saw a 7% fall in sales volume in 2025, possibly due to its significant price premium: it was more than twice as expensive as animal-based meat. This price premium may also explain the small market size (€65 million in 2025) of plant-based meat in Spain (for example, plant-based meat sales [in France](#) were valued at €171 million in 2025).

Plant-based cheese remained a niche category, representing just 0.1% of overall cheese sales volume. It also saw sales volume fall 3% in 2025 after a peak in 2024.

In contrast, plant-based yoghurt sales volume grew 23% in 2025, primarily driven by relatively expensive branded products.

This year’s report features a new chapter on **tofu and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. Tofu and seitan’s combined sales volume rose 8.6% in 2025, possibly driven by tofu’s low price

point. However, the sales volume of plant-based meat in 2025 was 42% higher than that of tofu and seitan combined, indicating that products that replicate the taste, texture or format of conventional meat products are important in the Spanish market.

Overview of plant-based food sales by category in Spain, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Meat	65.3	-6.3%	-7.0%	22.2	-7.3%	-5.6%	4.2	-7.0%	-7.4%
Milk and drinks	354.9	5.5%	8.2%	231.6	4.6%	10.0%	288.5	5.8%	12.6%
Cheese	7.4	-0.1%	10.8%	2.4	-2.6%	5.1%	0.4	-3.1%	2.8%
Yoghurt	118.0	26.7%	53.5%	55.8	23.8%	50.5%	22.1	22.8%	43.3%
Total	545.7	7.7%	13.3%	312.0	6.6%	14.1%	315.3	6.6%	13.9%

Data on additional products that are not counted towards the plant-based total

Tofu and seitan	20.3	2.2%	12.0%	9.8	3.6%	15.6%	3.0	8.6%	20.3%
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About the data

This report is based on sales data gathered by [Circana](#) from retailers in Spain. The data has been analysed by the Good Food Institute Europe.

The data for Spain covers all hypermarkets and all supermarkets over 100m² in area, including the discounter supermarkets Aldi and Lidl. It does not include food service sales, such as from restaurants or fast-food outlets.

Circana data for 2023, 2024 and 2025 covers the following dates:

- 2023: 2 January 2023 until 31 December 2023
- 2024: 1 January 2024 until 29 December 2024
- 2025: 30 December 2024 until 28 December 2025

The report also draws on household panel data from the [NIQ Panel On Demand Homescan](#) consumer panel, which tracks food purchases made by a representative panel of households who scan items that they bring home, to offer a complementary viewpoint to the Circana retail sales data.

Note that due to ongoing refinement and backdating of the datasets by both Circana and NIQ, the figures reported here are not directly comparable to those reported in the previous edition of this report.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat includes some products that are not direct substitutes for meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu or seitan – these categories have been reported separately.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in euros (€).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

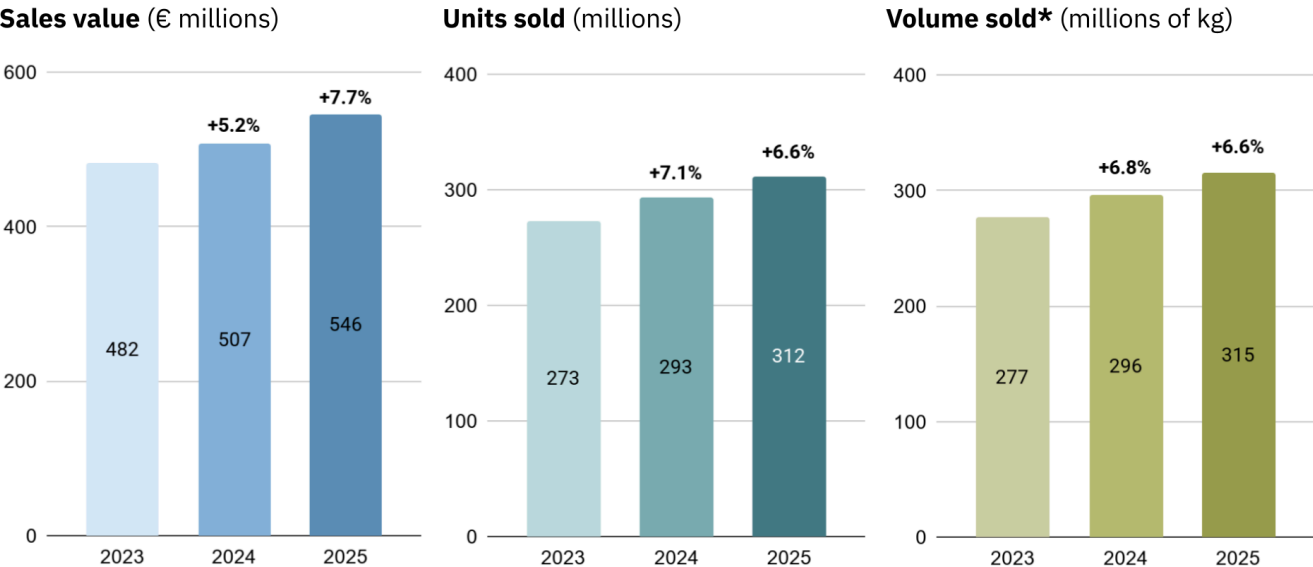
Overall plant-based food market

Total Spanish plant-based market

The market for plant-based foods in Spain grew steadily, but with mixed performance between categories. Plant-based milk and drinks and yoghurt grew, while meat and cheese declined.

The total annual sales value across four plant-based categories (meat, milk and drinks, cheese and yoghurt) grew by 7.7% to €546 million in 2025, which was 13.3% higher than in 2023. Unit sales rose 6.6% to 312 million in 2025 – up 14.1% from 2023. Sales volume was 315 million kg in 2025, 6.6% higher than 2024 and 13.9% higher than 2023.

Plant-based food sales across four categories in Spain, 2023-2025



*Sales volume was measured in litres for plant-based milk and drinks and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.

Categories

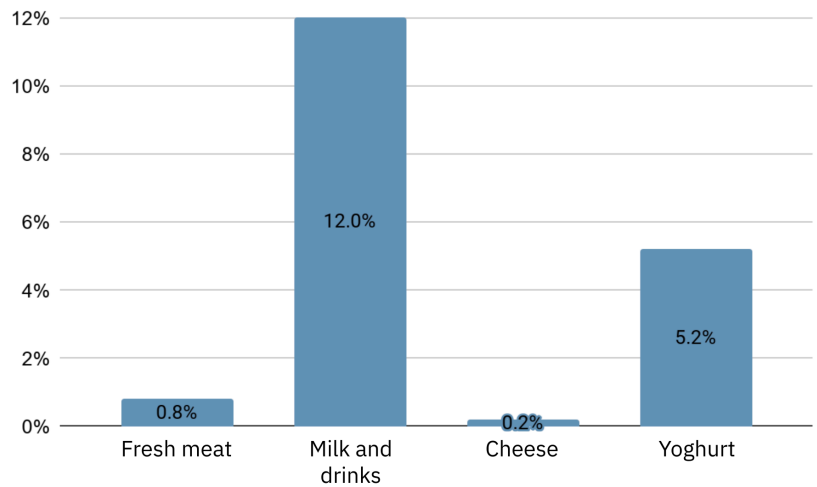
Plant-based milk and drinks are the largest category in the Spanish plant-based market. They had the highest sales value in 2025, and continued to grow in value, units and volume.

Plant-based milk and drinks were also closest to mainstream status relative to their animal-based counterparts, reaching 10.4% of the sales volume of all milk in 2025. Almost half (47.6%) of households in Spain bought plant-based milk and drinks at least once during 2025.

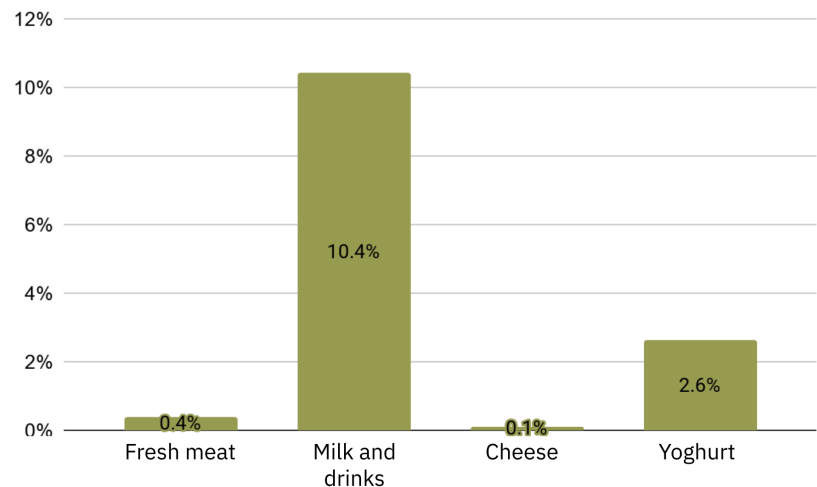
Plant-based meat and cheese had very low market shares in 2025, of less than 1%, indicating that these remain niche categories. These were the two smallest categories by sales value in 2025, and they both saw sales volumes fall.

Plant-based yoghurt was the second-largest category by sales value, and saw double-digit growth in both value and volume in 2025.

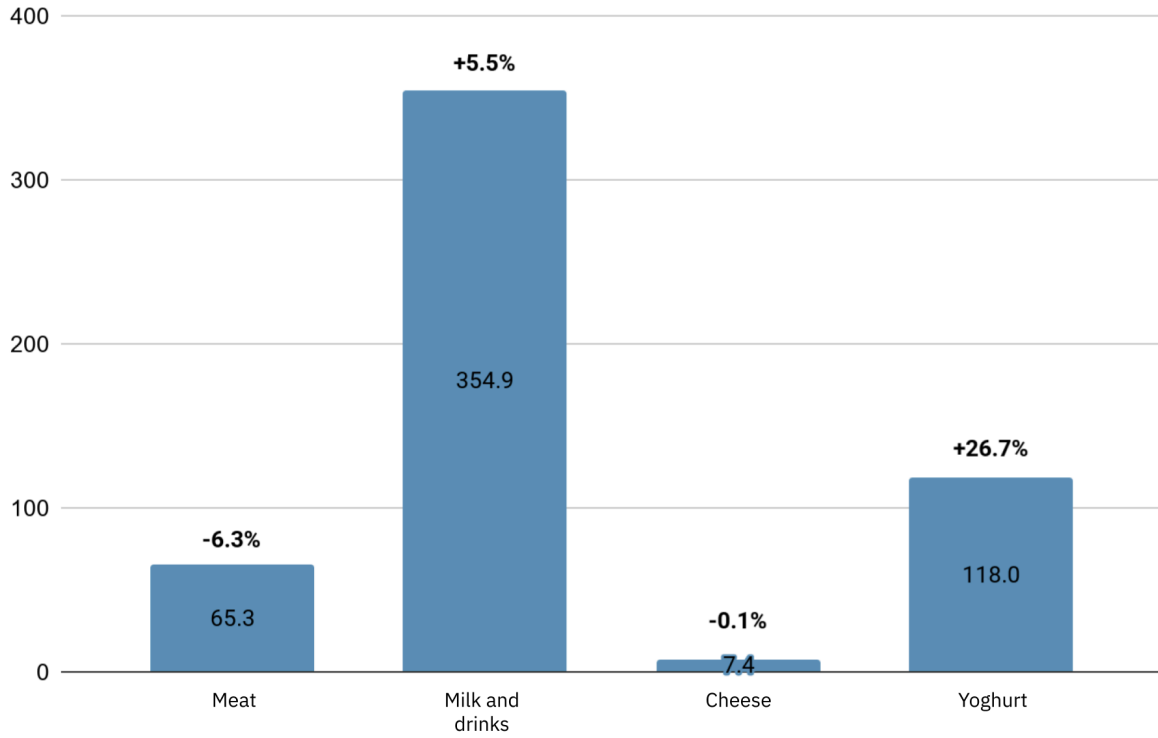
Plant-based food: share of Spain's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales value)



Plant-based food: share of Spain's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales volume)



Plant-based food sales value and growth rates* by category in Spain, 2025 (€ millions)



* The percentages above each column denote the change in sales value of that category between 2024 and 2025.

Branded versus private label

Private-label products – those sold under a retailer’s own brand – make up a large proportion of plant-based sales in Spain, possibly due to their generally lower prices.

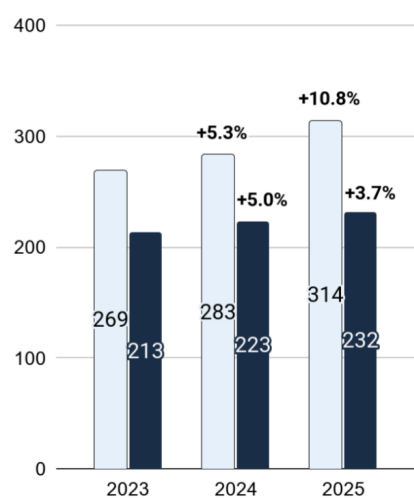
Private-label sales volume growth slowed in 2025 following steeper growth in 2024. Meanwhile, branded sales volume resumed in 2025 following a small dip in 2024. This could indicate that, while price is still likely to be an important driver of purchases, other factors such as taste and quality are also likely to be influencing Spanish consumers.

Plant-based sales and growth rates across four product categories in Spain, branded versus private label, 2023-2025

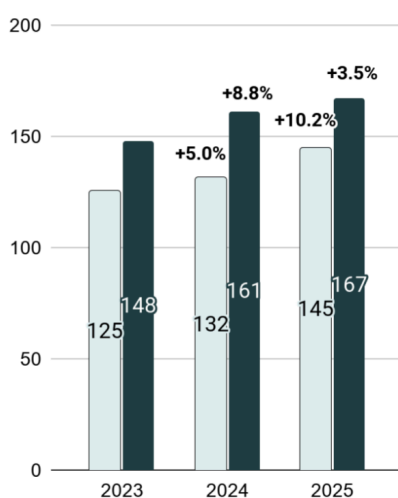
	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Branded	314.0	10.8%	16.7%	145.0	10.2%	15.7%	119.8	6.6%	4.1%
Private label	231.7	3.7%	8.9%	167.0	3.5%	12.7%	195.5	6.6%	20.9%

Branded vs private label plant-based food sales across four categories in Spain, 2023-2025

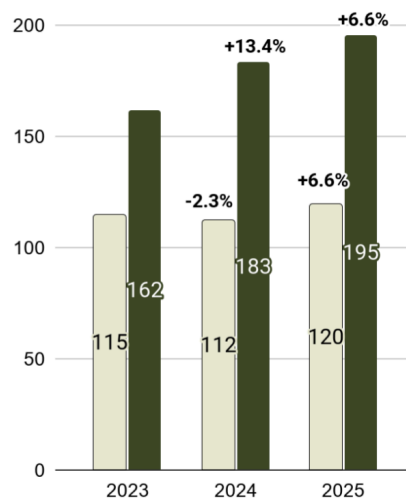
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)



■ Branded ■ Private label

■ Branded ■ Private label

■ Branded ■ Private label

*Sales volume was measured in litres for plant-based milk and drinks and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.

Comparison to animal-based foods

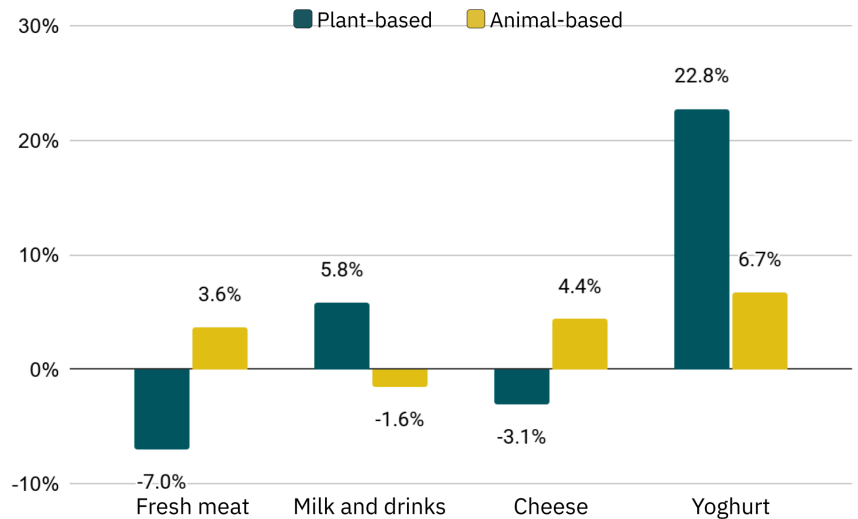
Plant-based foods saw higher growth rates than their animal-based counterparts in two categories between 2024 and 2025: milk and drinks, and yoghurt.

For meat and cheese, plant-based sales volume fell while animal-based sales volume rose.

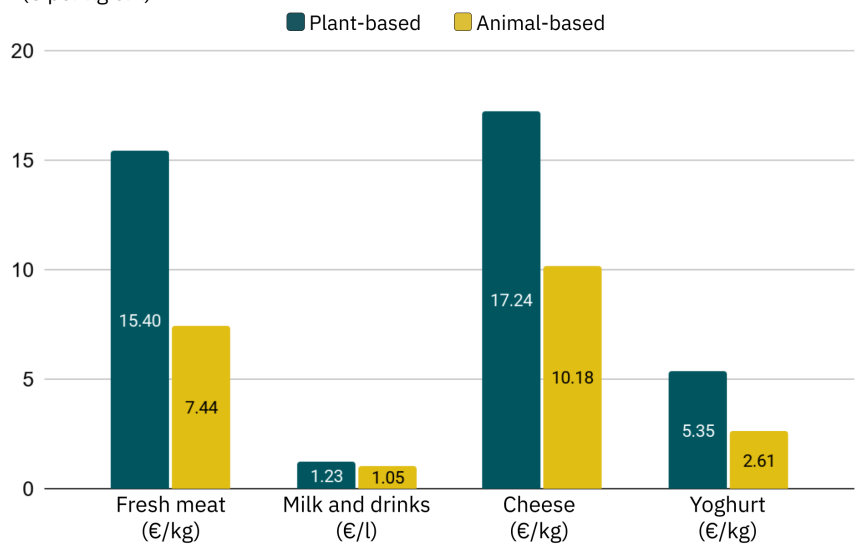
All plant-based categories remain more expensive per kg than their animal-based equivalents. In particular, the significant price premiums for plant-based meat, cheese and yoghurt are likely to be limiting the market size of these categories.

The price gap was smallest in the milk and drinks category, where plant-based products were 18% more expensive in 2025. However, private-label soy milk was 23% cheaper than private-label cow's milk.

Change in the sales volume of pre-packaged plant- and animal-based foods in Spain, 2024-2025 (%)



Average price per kg or litre of plant- and animal-based foods in Spain, 2025 (€ per kg or l)



Household purchase patterns

Household panel data from NIQ tracks food purchases brought home and scanned by a representative panel of consumers in Spain. This provides a complementary view of market trends, alongside the Circana retail sales data presented above.

According to the NIQ household panel data, the proportion of Spanish households that bought plant-based meat at least once per year peaked at 21.4% in 2024, then fell to 19.2% in 2025. Frequent purchasers (those buying an average of once a month or more) also peaked at 3.2% in 2024, then fell to 2.7% in 2025. These falling proportions match the falling sales volume of plant-based meat shown by the Circana retail sales data.

The household panel data confirms that plant-based milk and drinks are commonly consumed, with 47.6% of households buying them at least once in 2025. This proportion has risen since 2023. Frequent purchasers also rose, reaching 18.2% in 2025.

The proportion of sales value from discounter stores remained roughly level between 2023 and 2025 for plant-based meat, but fell for plant-based milk.

Household purchase patterns for plant-based foods in Spain, 2023-2025

Spain	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2023	2024	2025	2023	2024	2025	2023	2024	2025	2023	2024	2025
Plant-based meat	20.8%	21.4%	19.2%	5.9%	6.0%	5.3%	3.1%	3.2%	2.7%	22.3%	23.7%	23.4%
Plant-based milk	43.8%	45.6%	47.6%	24.2%	25.4%	27.4%	16.0%	17.0%	18.2%	19.0%	16.7%	16.4%

Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Spain. The data covers ‘Take Home’ shopping and comes from a sample of 12,000 households. Data covers plant-based meat substitutes and plant-based milk and drinks (bebidas vegetales). Note that the proportion of sales from discounters reported for 2023 and 2024 here is lower than that of the previous edition of this report. This is due to the expansion of the household panel sample size and improved calibration by NIQ, resulting in more accurate data.

Plant-based meat

Total market

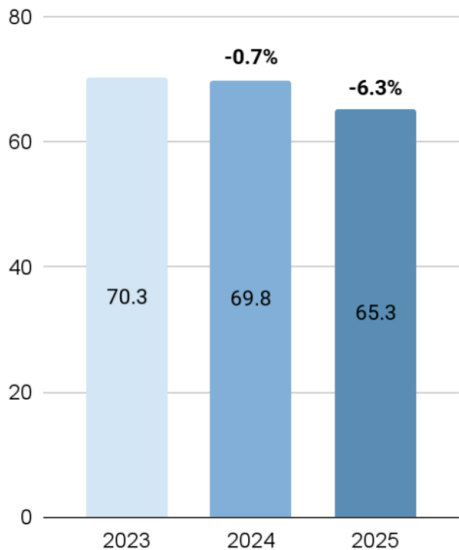
Following steady performance in 2024, the market for plant-based meat in Spain contracted in 2025.

Annual sales value fell 6.3% to €65.3 million in 2025, 7.0% lower than in 2023. Unit sales fell 7.3% in 2025 to 22.2 million, down by 5.6% relative to 2023. Sales volume fell 7.0% to 4.24 million kg in 2025, 7.4% lower than in 2023.

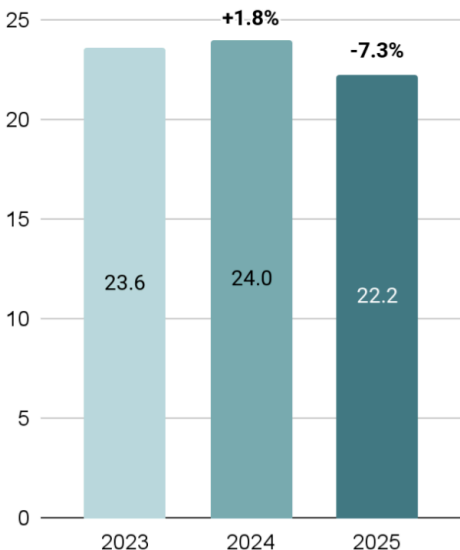
The decline in the sales volume of plant-based meat might be related to its price. Plant-based meat was more than twice as expensive per kg as animal-based meat in 2025. Although this price premium had fallen from 2023, the absolute price per kg of plant-based meat increased. The price premium is higher than in some other countries, possibly explaining the low market share of plant-based meat in Spain. For example, [in France](#), chilled plant-based meat was only 25% more expensive per kg than chilled animal-based meat in 2025 (mainly due to higher animal-based meat prices in France than in Spain).

Plant-based meat sales in Spain, 2023-2025

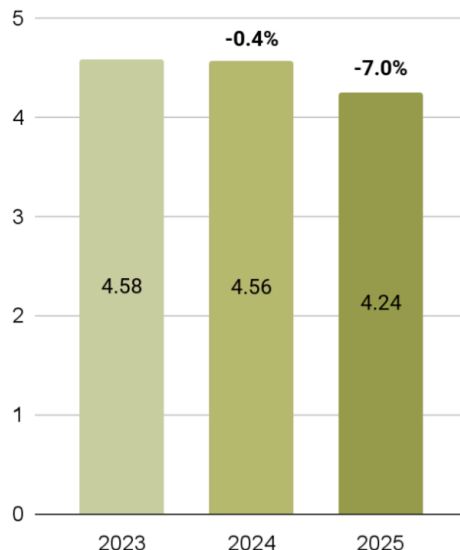
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)



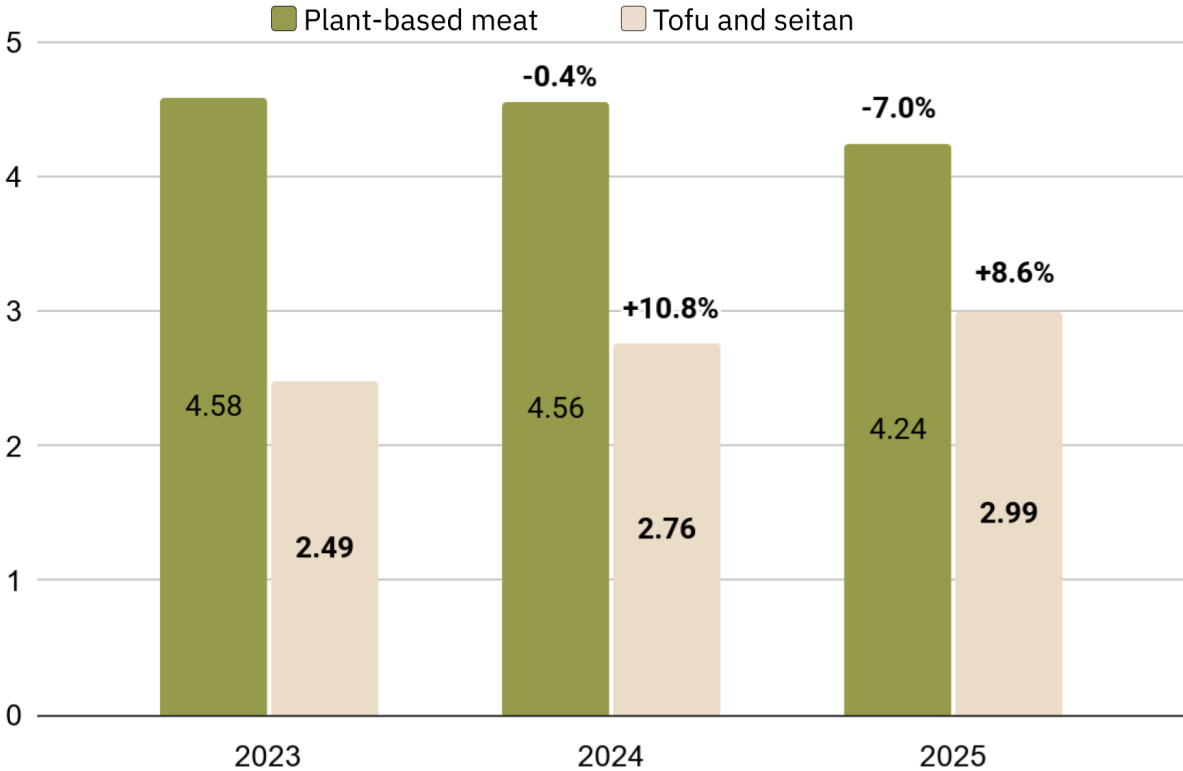
The plant-based meat category in Spain includes both products that aim to replicate the taste and texture of meat, and products that use meaty formats but do not directly mimic meat, such as burgers made from tofu or vegetables. It was not possible to separate out the sales values of these two types of products.

Tofu and seitan, as cooking ingredients rather than being sold as part of products such as burgers, are not counted towards the plant-based meat total. Their sales trends are reported in more detail in the next chapter, “Spotlight on tofu and seitan”.

In contrast to falling sales of plant-based meat, the combined sales volume of tofu and seitan rose by 20.3% between 2023 and 2025, possibly driven by their affordability: an average of €6.80/kg in 2025, compared with €15.40/kg for plant-based meat.

However, the sales volume of plant-based meat in 2025 was 42% higher than that of tofu and seitan combined, indicating that products that replicate the taste, texture or format of conventional meat products remain more popular with Spanish consumers.

Plant-based meat compared to tofu and seitan in Spain, 2023-2025 (sales volume, million kg)

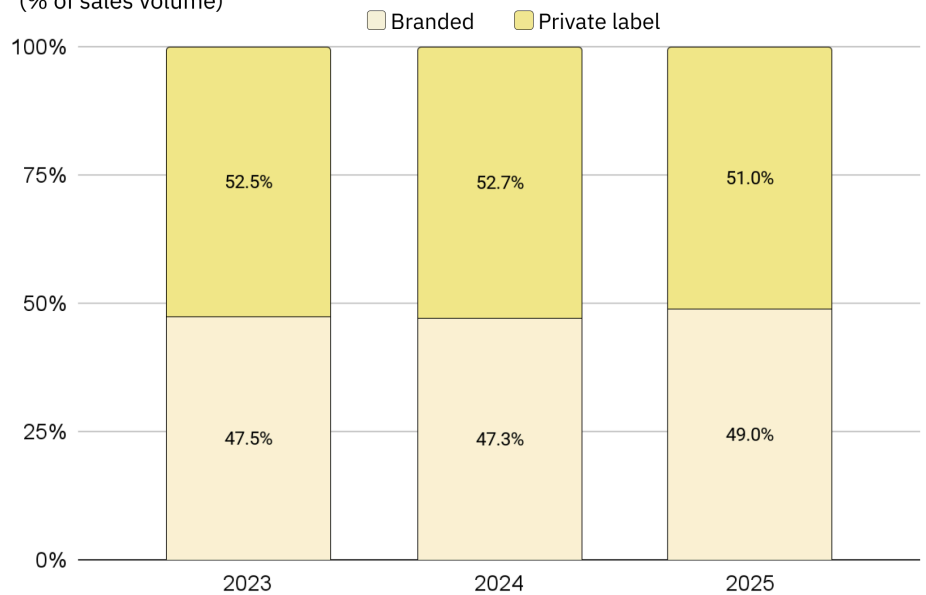


Branded versus private label

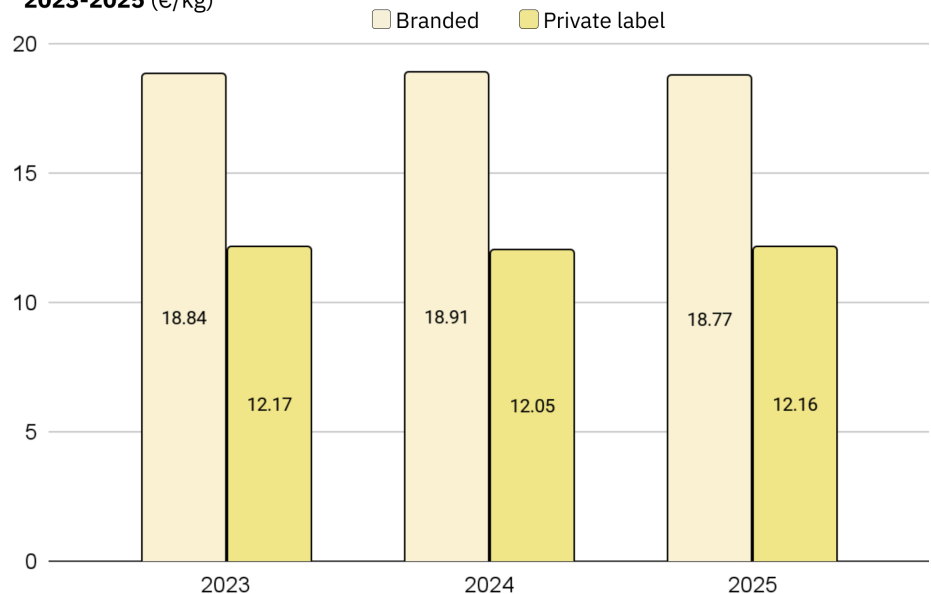
Private-label (ie, supermarket own-brand) products accounted for roughly half of the sales volume of plant-based meat between 2023 and 2025.

Private-label products were 35% cheaper per kg than branded products in 2025, a price gap that remained roughly steady between 2023 and 2025.

Spain plant-based meat sales by branded or private label, 2023-2025
(% of sales volume)



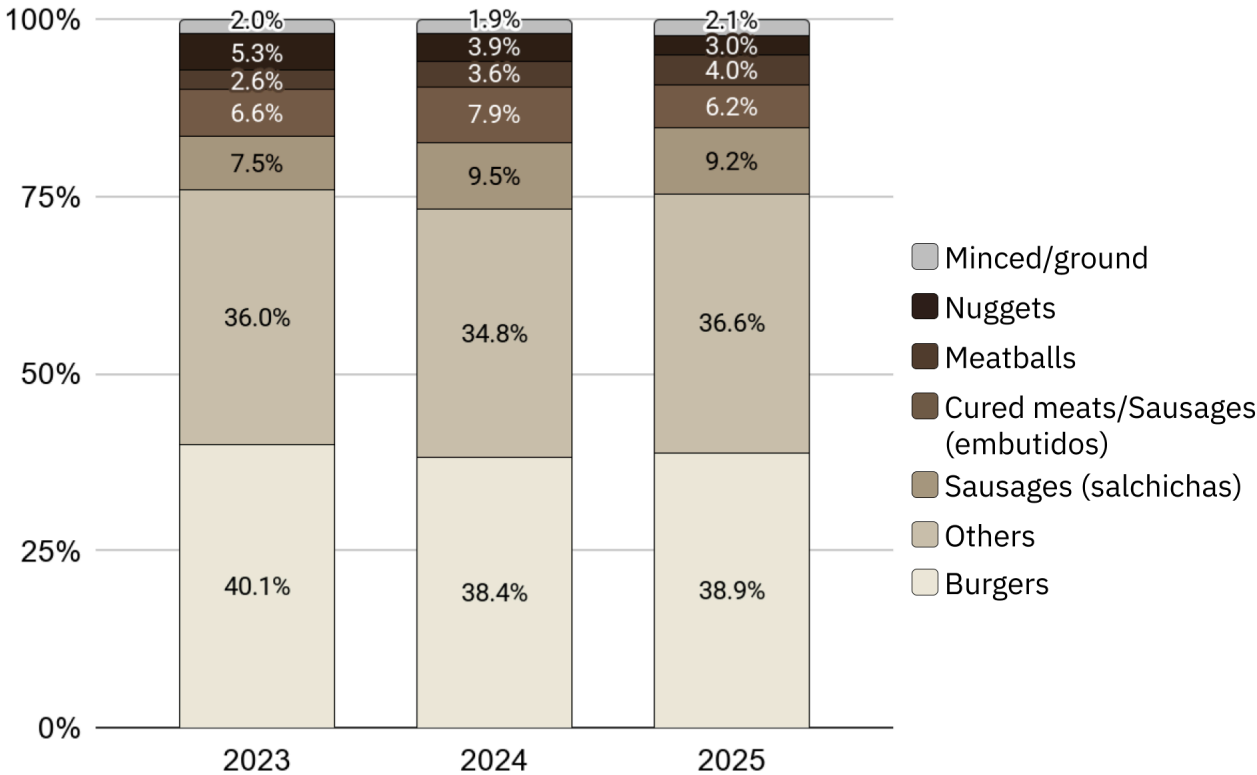
Average price per kg of plant-based meat in Spain, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

The leading format in 2025 was burgers, at 38.9% of sales volume. The “others” category includes a variety of products such as chunks. There were no major shifts in the proportions of formats between 2023 and 2025.

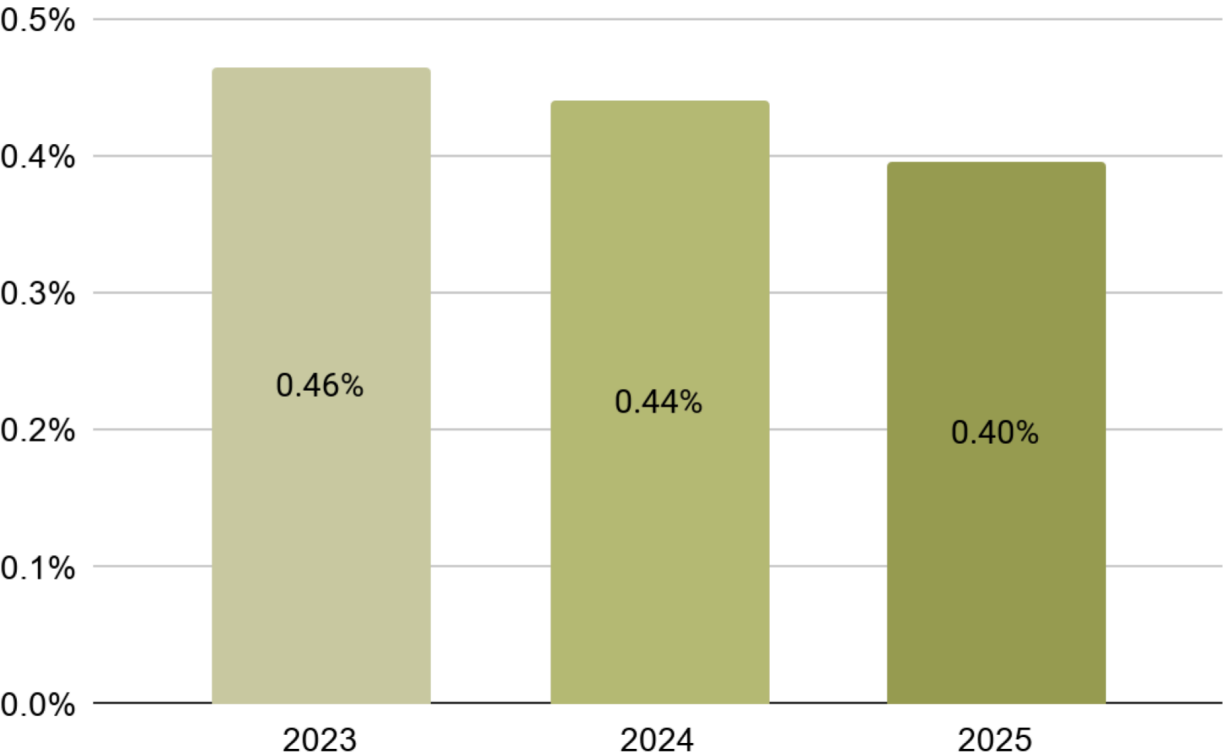
Spain plant-based meat sales by type, 2023-2025 (% of sales volume)



Market share

Plant-based meat’s market share, as a percentage of the overall sales volume of plant-based and animal-based pre-packaged meat¹, fell from 0.46% in 2023 to 0.40% in 2025. This tiny and falling market share shows that plant-based meat is still a niche product in Spain. The sales volume of animal-based meat rose by 8.7% between 2023 and 2025, further contributing to the falling market share of plant-based meat.

Plant-based meat: share of Spain’s total (plant- and animal-based) pre-packaged meat market, 2023-2025 (% of sales volume)



¹ Note that the animal-based meat data covers only fresh meat.

Price trends relative to animal equivalent

Plant-based meat in Spain is more than twice as expensive per kg as animal-based meat, which may be contributing to its low market share.

The price premium fell from 115% in 2023 to 107% in 2025, partly due to rising animal-based meat prices. Plant-based meat also became more expensive in 2025.

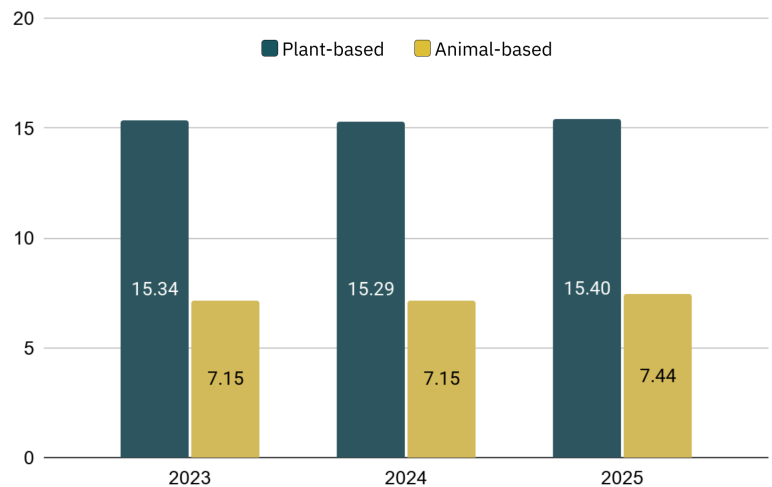
In the branded segment, plant-based meat was 139% more expensive than branded animal-based meat in 2025.

Private-label plant-based meat was 67% more expensive than private-label animal-based meat in 2025.

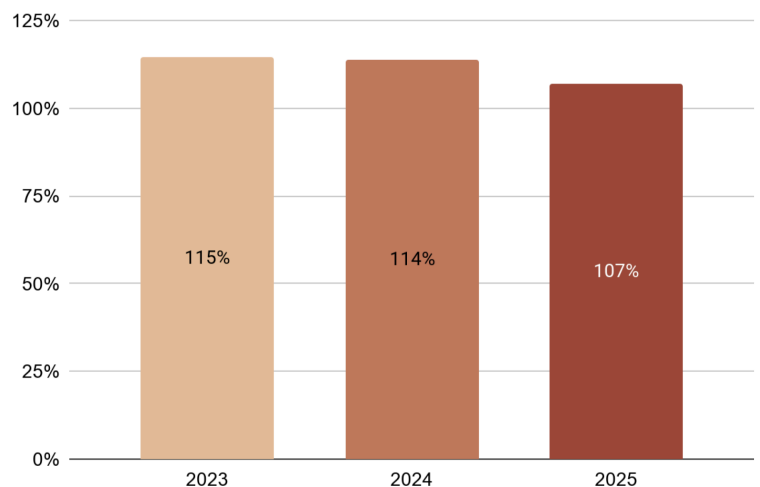
The large price premium for plant-based meat in Spain can be partly attributed to lower animal-based meat prices than in other European countries, [such as France](#), where chilled animal-based meat cost an average of €13.51/kg in 2025.

The price premium varies based on what type of animal-based meat is used for comparison. In Spain, nearly half of the sales volume of fresh animal-based meat is from chicken, the cheapest meat (at €5.34/kg). However, plant-based burgers cost €14.51/kg in 2025, whereas fresh animal-based beef cost €13.85/kg.

Average price per kg for plant-based and animal-based meat in Spain, 2023-2025 (€/kg)



Price difference for plant-based meat compared to animal-based meat in Spain, 2023-2025 (% difference based on €/kg)

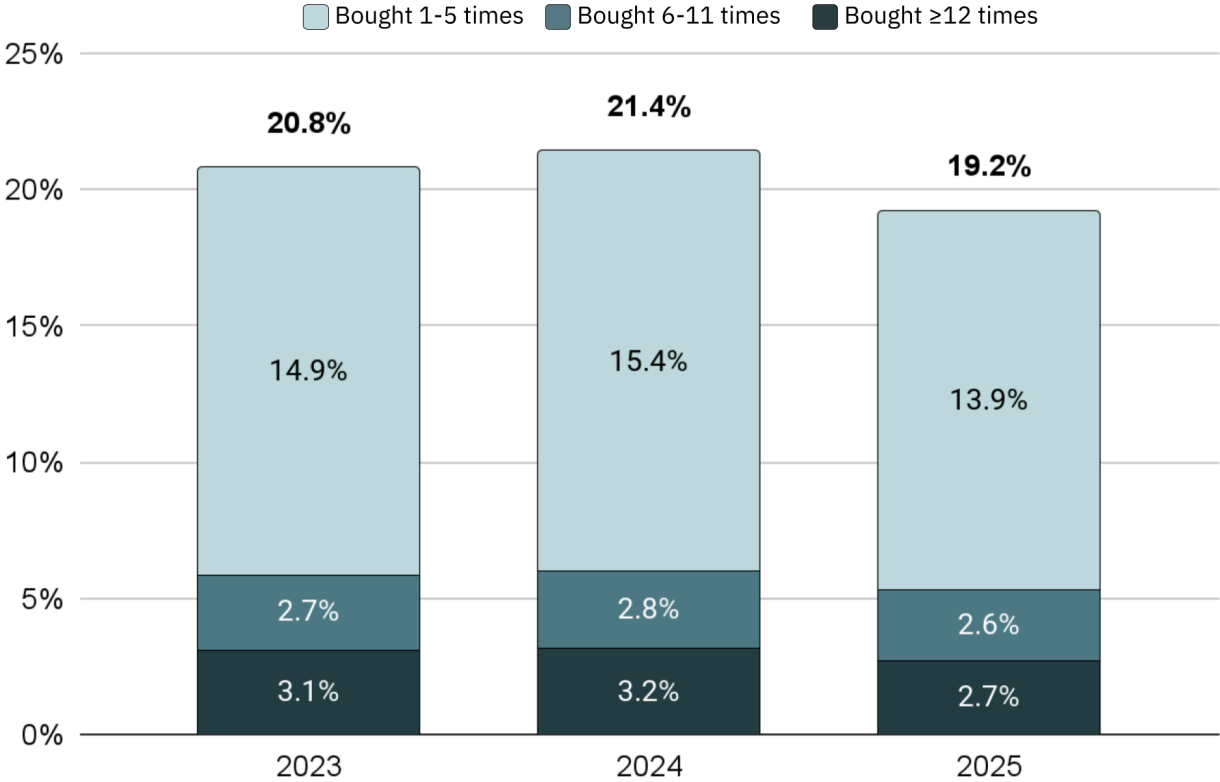


Household panel data

Household panel data from NIQ² showed that the proportion of households in Spain that bought plant-based meat at least once per year fell from 21.4% in 2024 to 19.2% in 2025. The proportion of frequent purchasers (those buying an average of once per month or more) also fell, from 3.2% in 2024 to 2.7% in 2025.

These falling proportions of purchasers in 2025 align with the fall in sales volume shown by the Circana retail sales data.

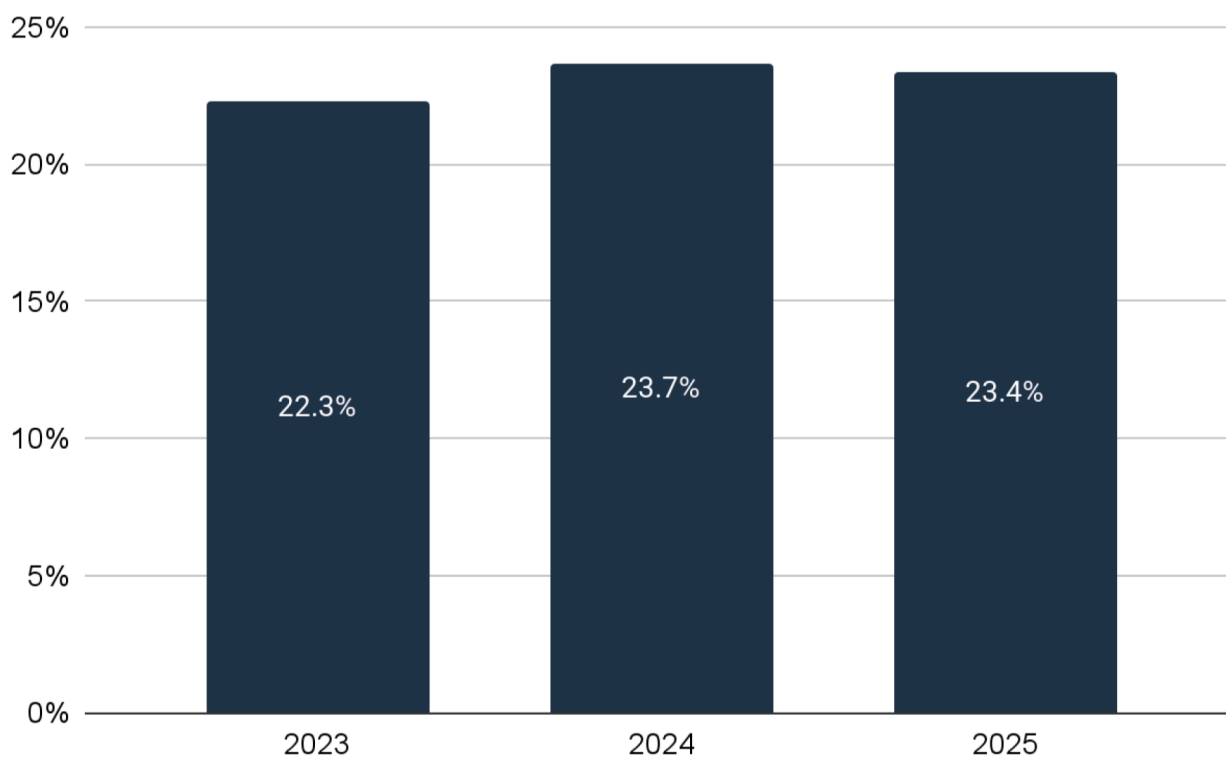
Annual household purchase patterns for plant-based meat in Spain, 2023-2025 (% of households)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Spain. The data covers ‘Take Home’ shopping and comes from a sample of 12,000 households. Data covers plant-based meat substitutes.

² Note that since this household panel data is from a different data provider (NIQ) to the bulk of the retail sales data in this report (from Circana), the results are not directly comparable. However, they are valuable for cross-referencing the market trends.

Household purchase patterns for plant-based meat in Spain: proportion of sales value from discounter stores, 2023-2025 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Spain. The data covers 'Take Home' shopping and comes from a sample of 12,000 households. Data covers plant-based meat substitutes.

The proportion of plant-based meat's sales value that came from discounter stores³ (such as Aldi and Lidl) peaked in 2024, before falling slightly to 23.4% in 2025.

³ Note that the proportions of sales from discounters reported for 2023 and 2024 here are lower than those reported in the previous edition of this report. This is due to expansion of the household panel sample size and improved calibration by NIQ, resulting in more accurate data.

Spotlight on tofu and seitan

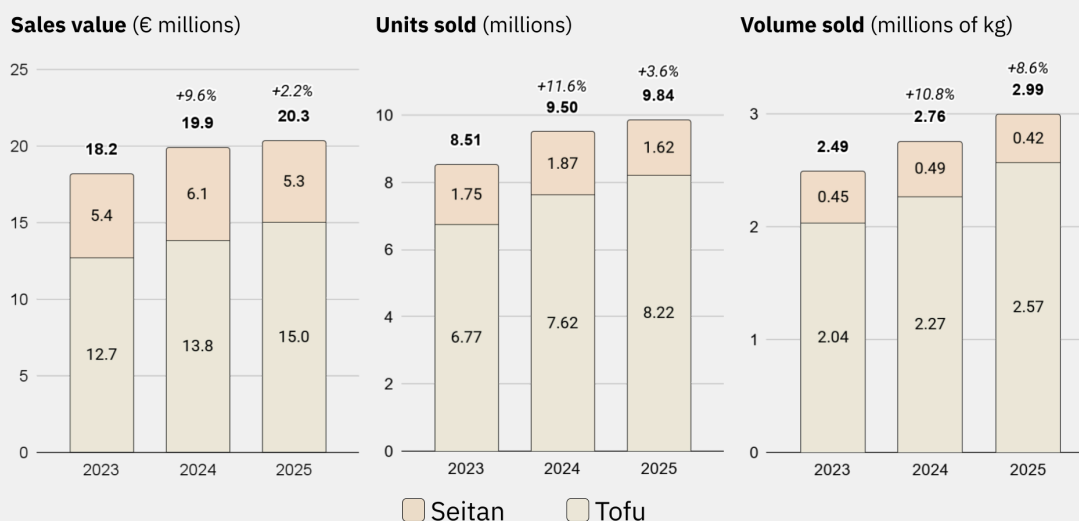
Total market

Tofu and seitan⁴ are traditional foods with a long history in Asian cooking. They are not classed as plant-based meat in this report because, in the Spanish market, they are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meats that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat.

The combined annual sales value of tofu and seitan rose 2.2% to €20.3 million in 2025, 12.0% higher than in 2023. Unit sales reached 9.8 million in 2025, up by 3.6% compared to 2024 and up by 15.6% compared to 2023. Sales volume rose 8.6% to 3.0 million kg in 2025, which was 20.3% higher than in 2023.

The higher rate of growth in sales volume, compared to unit sales, is due to the average pack size of tofu increasing from 301g in 2023 to 313g in 2025. Falling tofu prices (per kg) explain the lower rate of growth in sales value.

Tofu and seitan sales in Spain, 2023-2025



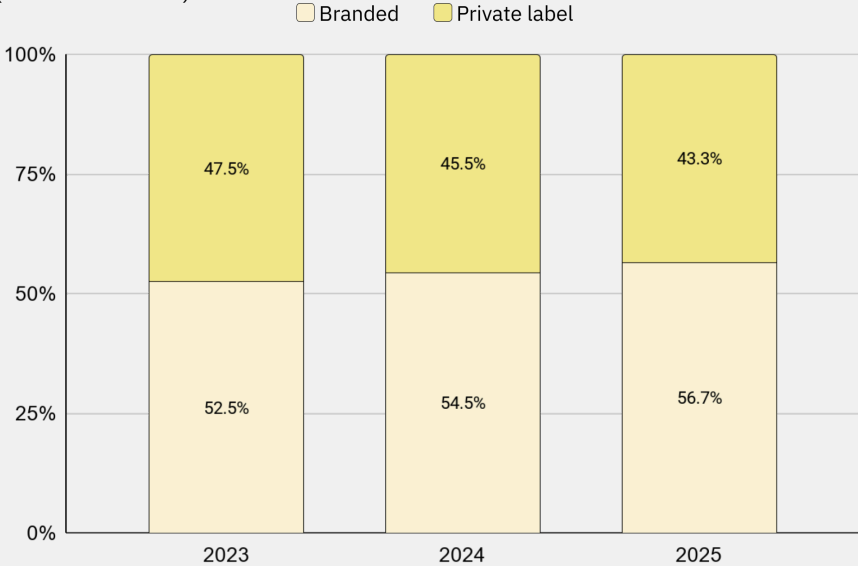
⁴ Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Seitan is made from wheat gluten and historically used in various Asian cuisines. This chapter covers tofu and seitan sold as cooking ingredients, not those incorporated into finished products such as tofu burgers.

Branded versus private label

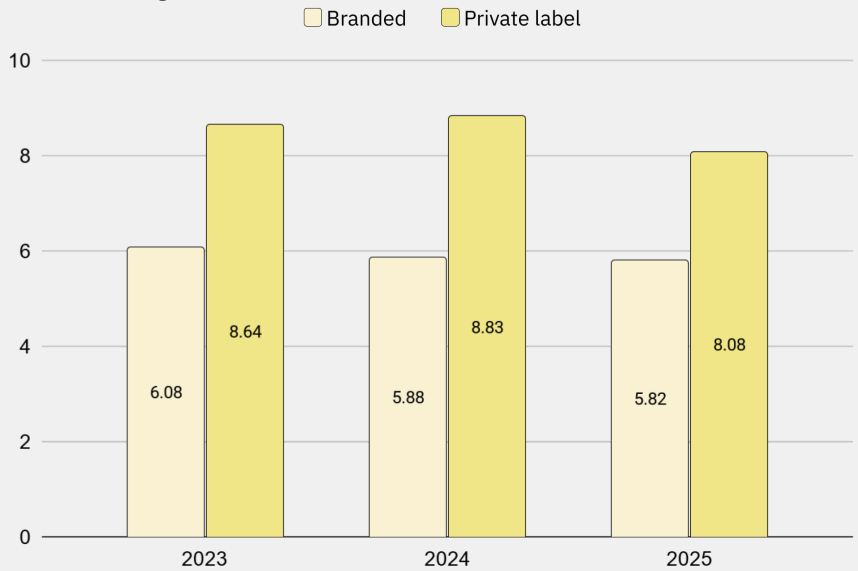
Branded products accounted for just over half of the sales volume of tofu and seitan in 2023, and this proportion rose to 56.7% by 2025.

Unlike in the other categories, private-label products were more expensive per kg than branded products, which, as shown in the next section, can be attributed to the relatively low price of branded tofu.

Spain tofu and seitan sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of tofu and seitan in Spain, by branded or private label, 2023-2025 (€/kg)



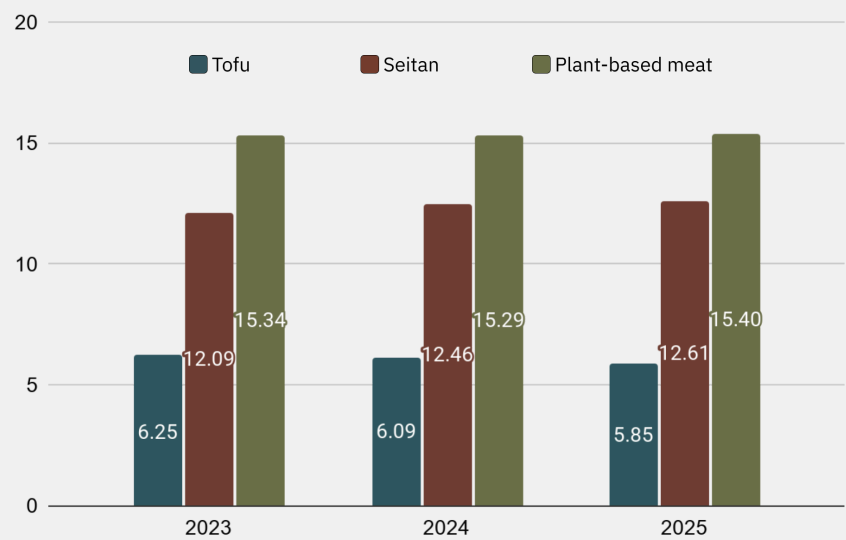
Price trends

Tofu was significantly cheaper than both seitan and plant-based meat, at an average of €5.85/kg in 2025. Plant-based meat cost 2.6 times more.

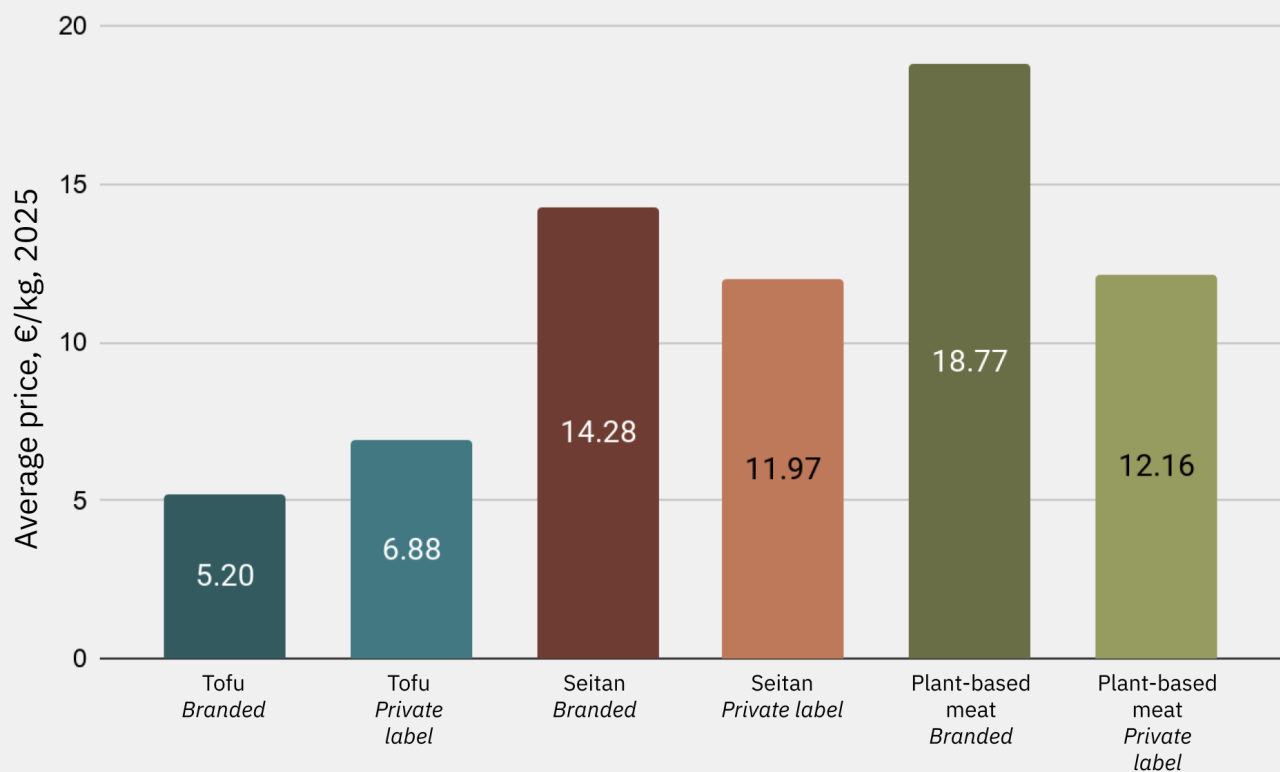
Within tofu, the cheapest segment was branded tofu, which, unlike in other categories, was cheaper (€5.20/kg in 2025) than private-label tofu (€6.88).

While private-label tofu was cheaper per unit (€1.66/unit in 2025) than branded tofu (€2.00/unit), it was also sold in smaller packs on average (241g/unit in 2025) than branded tofu (385g/unit).

Average price per kg for tofu, seitan and plant-based meat in Spain, 2023-2025 (€/kg)



Average price per kg for tofu, seitan and plant-based meat segments in Spain, by branded or private label, 2025 (€/kg)



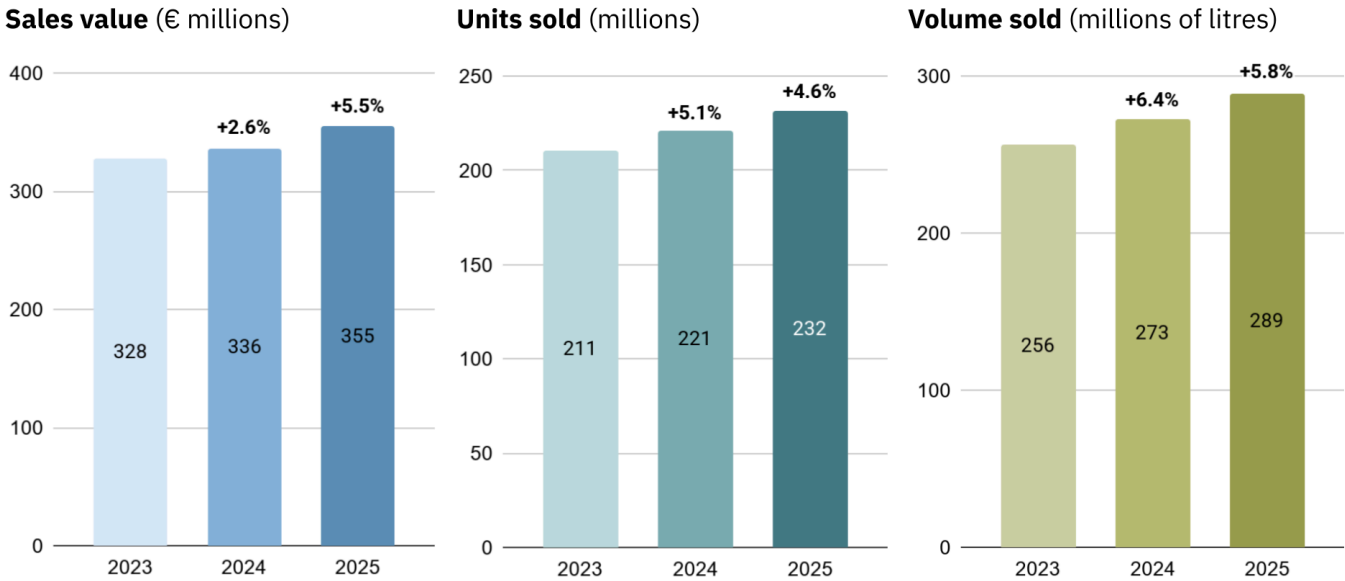
Plant-based milk and drinks

Total market

Spain’s plant-based milk and drinks⁵ market continued to grow steadily.

Sales value rose by 5.5% to €355 million in 2025, 8.2% higher than in 2023. Unit sales increased by 4.6% to 232 million in 2025, up 10.0% from 2023. Sales volume rose by 5.8% to 289 million litres in 2025, 12.6% higher than in 2023.

Plant-based milk and drinks sales in Spain, 2023-2025

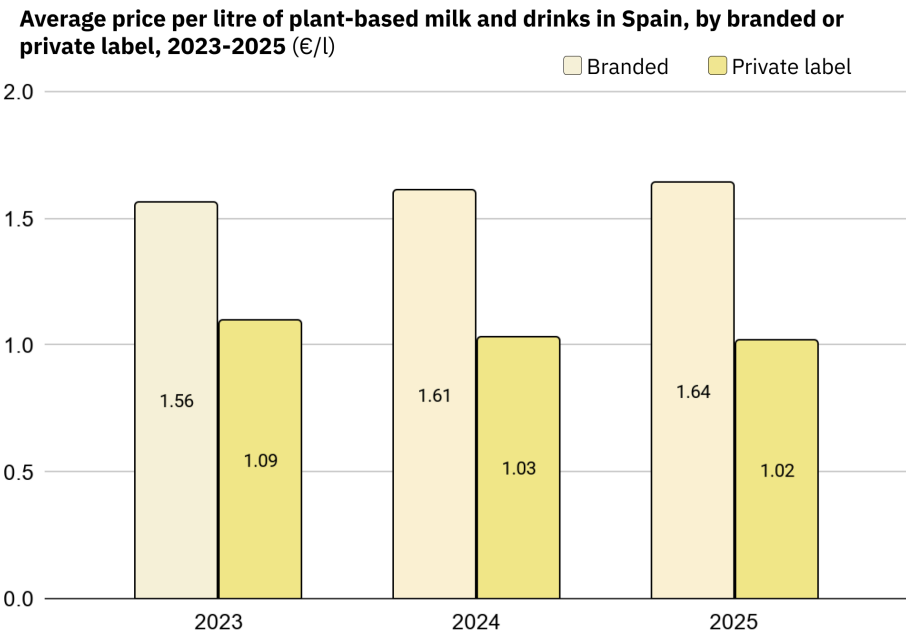
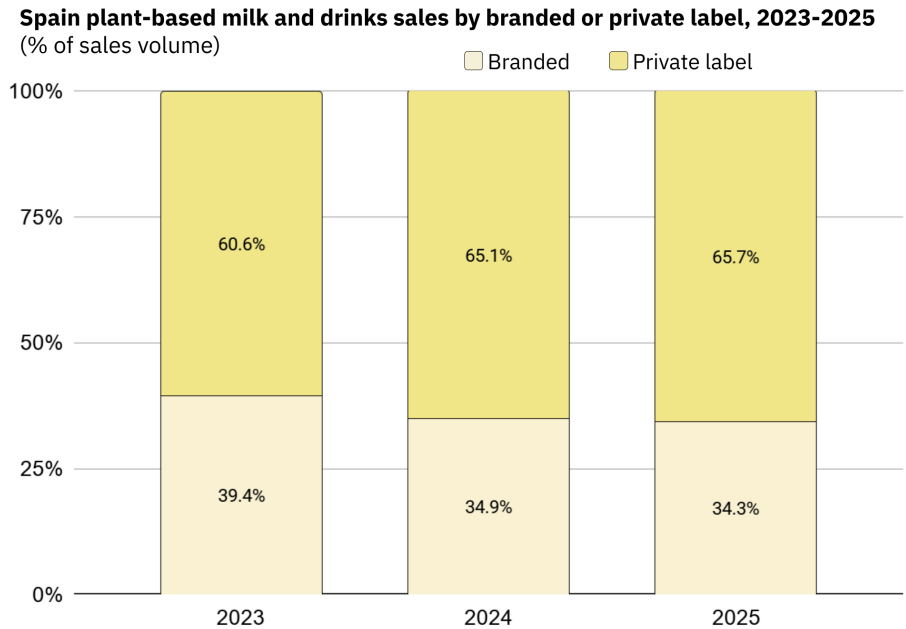


⁵ Drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Branded versus private label

Private-label products accounted for nearly two-thirds of sales volume in 2025, up slightly from 2023.

Private-label products are cheaper than branded products, and their price advantage increased over time: from 30% cheaper per litre in 2023 to 38% cheaper in 2025.



Product format breakdown

Oat milk accounted for nearly half of sales volume. Its share of plant-based sales rose slightly between 2023 and 2025, while its absolute sales volume rose by 18%.

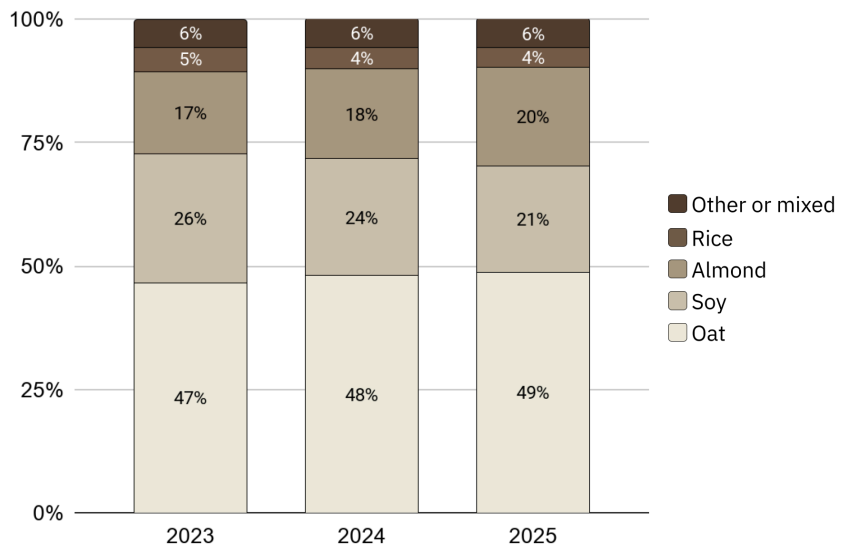
Soy milk's share fell from 26% to 21%, and its sales volume fell by 8% between 2023 and 2025. Soy milk was also the cheapest segment in 2025, at €0.94/l, indicating that affordability alone is not enough to drive sales growth.

Almond milk's share of plant-based sales grew from 17% to 20%, and its sales volume rose by 36% between 2023 and 2025, despite it being one of the more expensive segments, at €1.46/l in 2025.

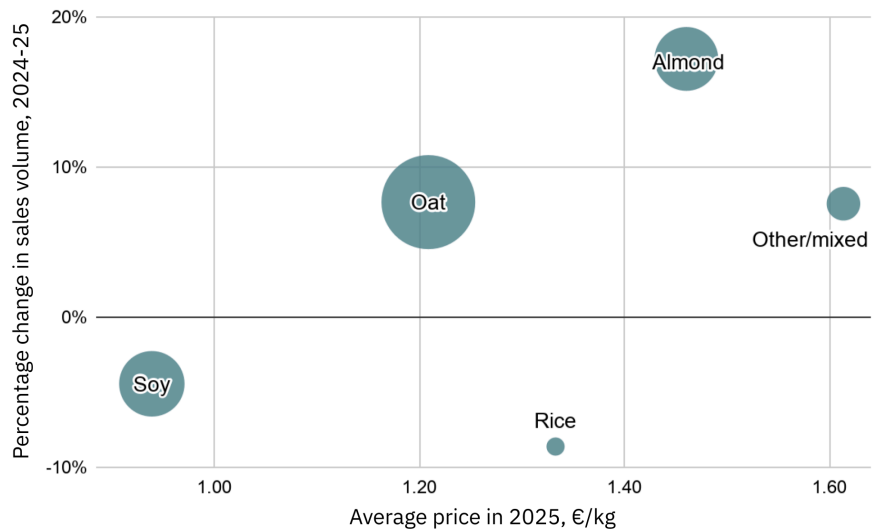
Barista-style products, which are designed to foam and perform well in hot drinks, rose from 1.9% of sales volume in 2023 to 3.5% in 2025, despite being 64% more expensive per litre than non-barista style products.

The overall pattern of stronger growth in more expensive segments suggests that factors such as taste and product performance are strong drivers of consumer choice, in addition to price.

Spain plant-based milk and drinks sales by base ingredient, 2023-2025 (% of sales volume)



Average price versus sales volume change, plant-based milk by base ingredient*, Spain

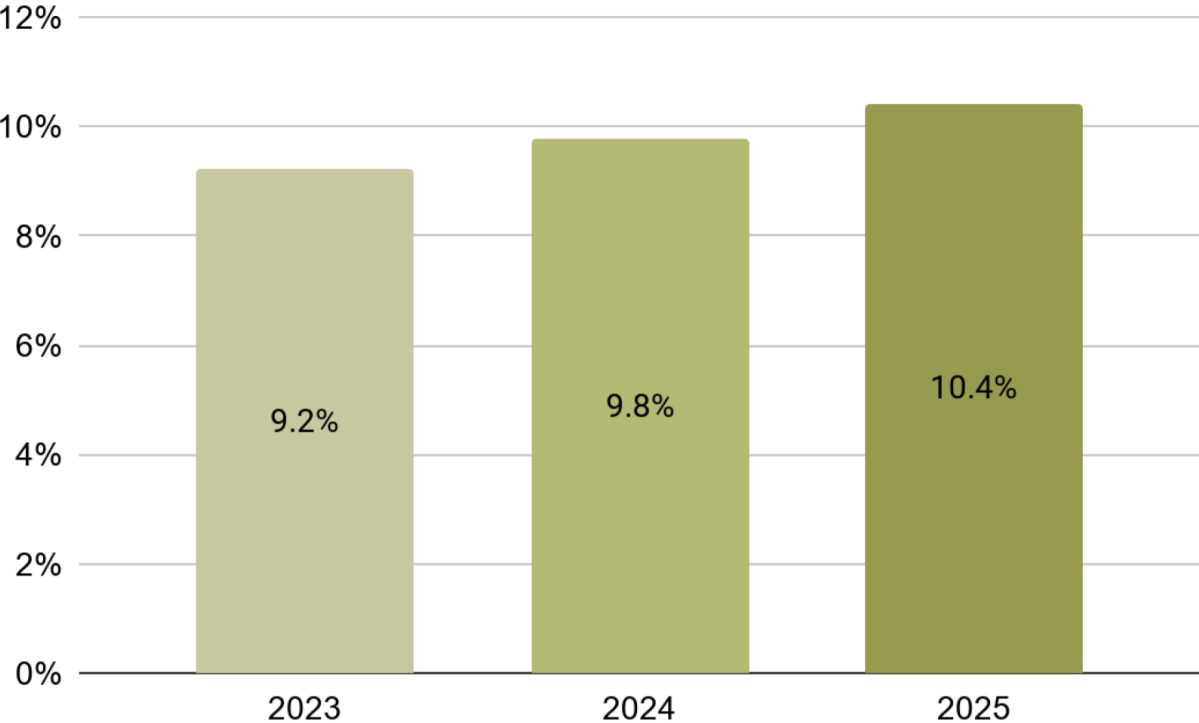


*Bubble size represents sales volume in 2025.

Market share

As a share of the total sales volume of plant-based milk and drinks and animal-based milk combined, plant-based milk and drinks grew their market share from 9.2% in 2023 to 10.4% in 2025. This indicates that plant-based milk is approaching mainstream status in Spain.

Plant-based milk and drinks: share of Spain’s total (plant- and animal-based) milk and drinks market, 2023-2025 (% of sales volume)



Price trends relative to animal equivalent

The price gap between plant- and animal-based milk fell in 2025, partly due to falling plant-based prices and partly due to rebounding animal-based prices.

Plant-based options were 23% more expensive per litre in 2023, falling to 18% more expensive in 2025.

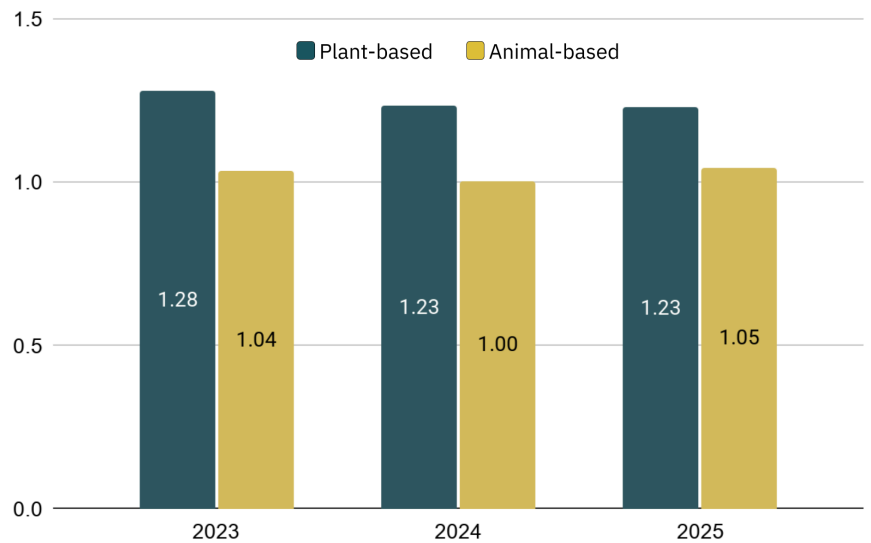
When comparing only branded products, plant-based options were 33% more expensive per litre in 2025.

The price gap was narrower in the private-label segment, where plant-based options were just 7% more expensive than private-label animal-based milk in 2025.

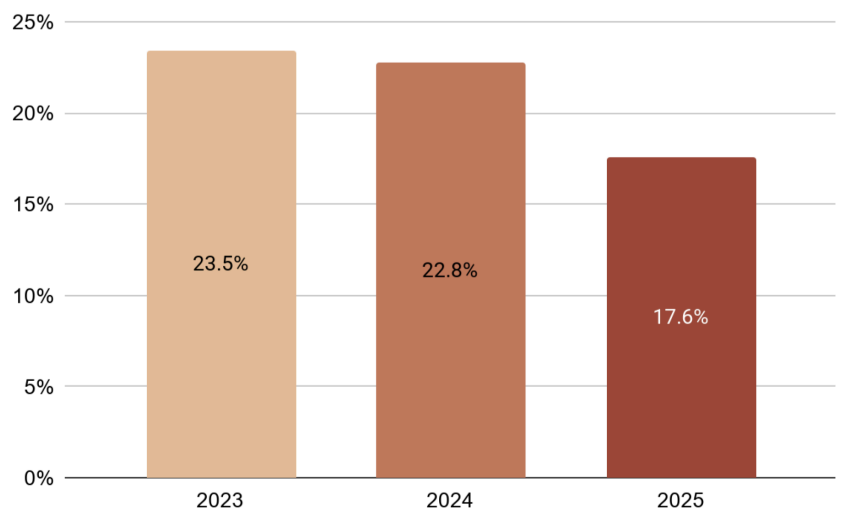
The cheapest segment in 2025 was private-label soy. At €0.73/litre, it was 23% cheaper than private-label animal-based milk.

Note that animal-based milk is subject to a [lower rate of sales tax](#) (4%) than plant-based milk (10%).

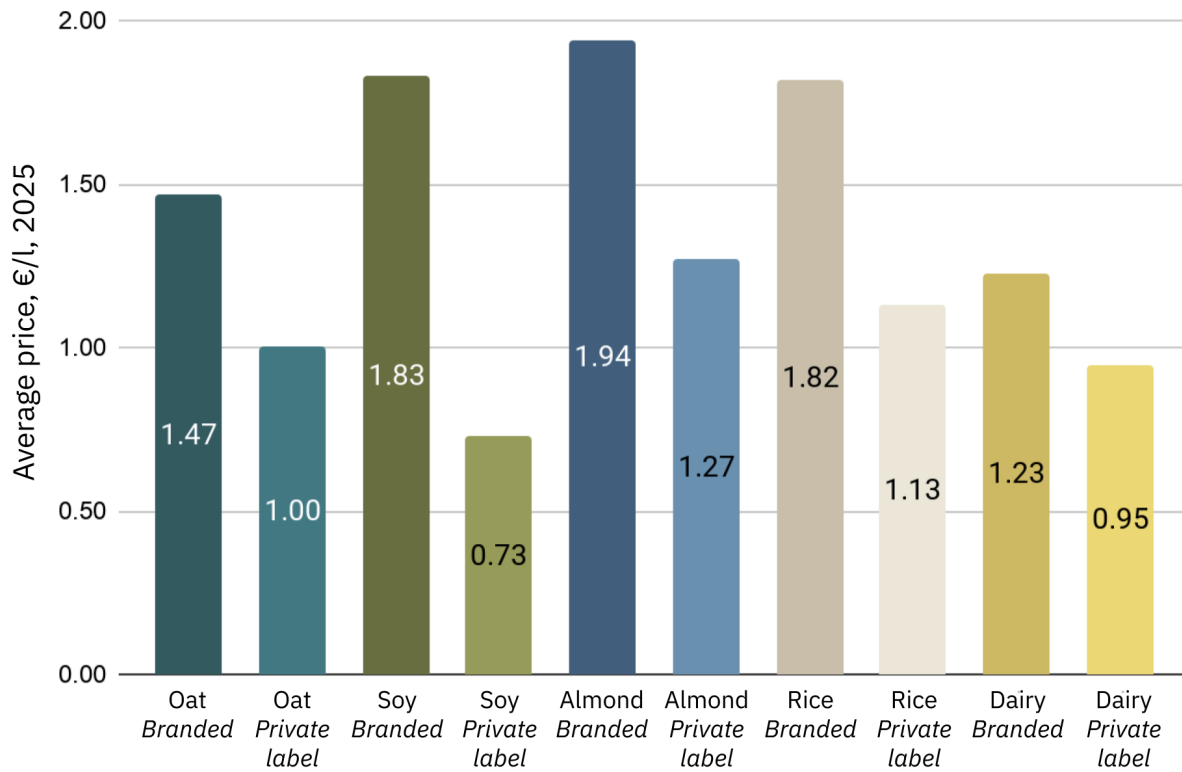
Average price per litre for plant-based and animal-based milk and drinks in Spain, 2023-2025 (€/l)



Price difference for plant-based milk and drinks compared to animal-based milk and drinks in Spain, 2023-2025 (% difference based on €/l)



Average price per litre for selected plant-based and animal-based milk and drinks in Spain, by branded or private label, 2025 (€/l)



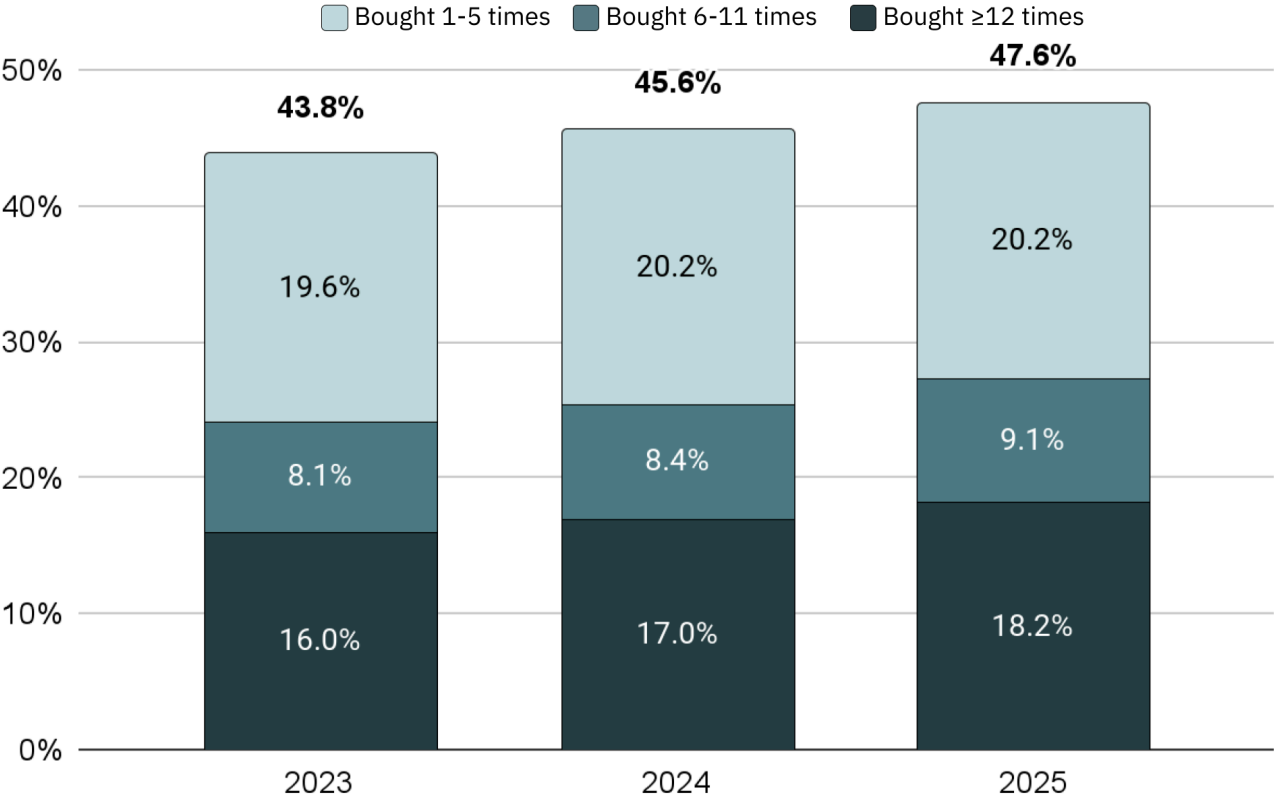
Household panel data

Household panel data from NIQ shows that the proportion of Spanish households that bought plant-based milk and drinks at least once per year rose from 43.8% in 2023 to 47.6% in 2025.

Furthermore, the proportion of those who were frequent purchasers (buying 12 or more times per year) rose from 16.0% in 2023 to 18.2% in 2025.

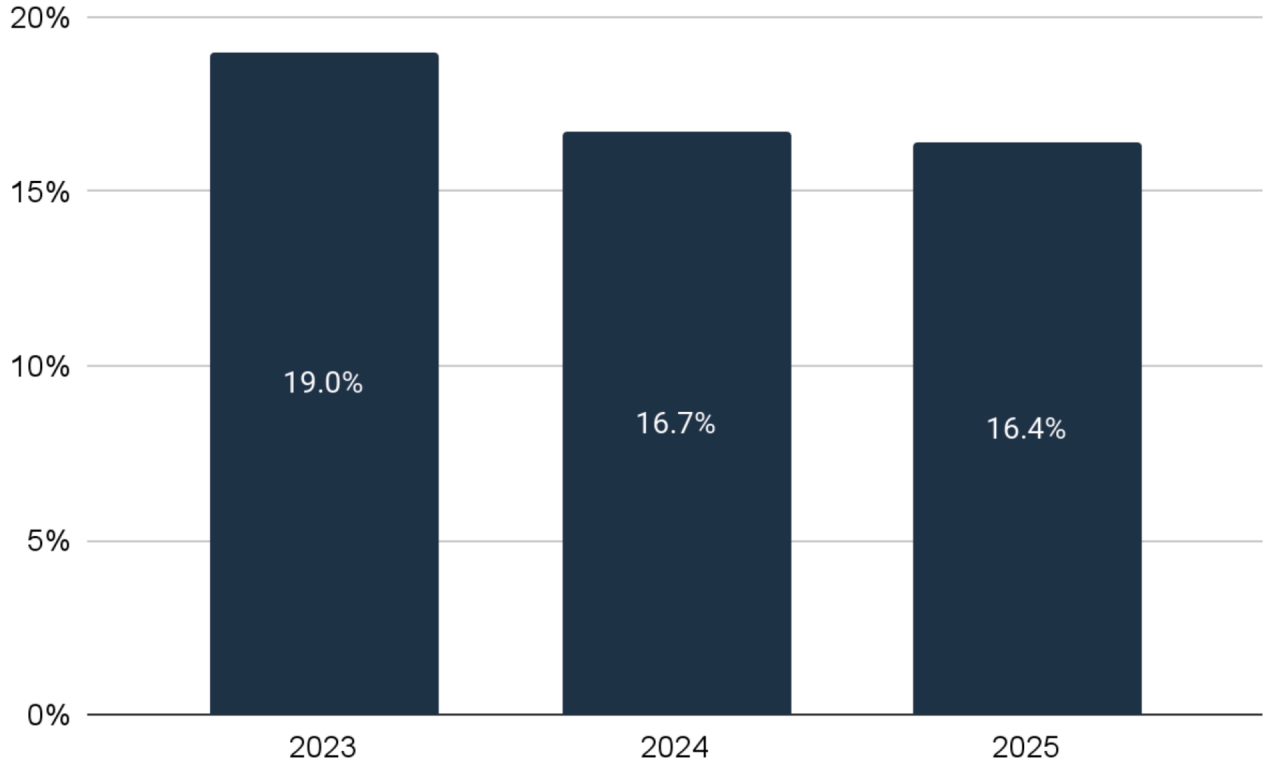
This rise in frequent and overall purchasers aligns with the rising sales shown by the Circana data. It also demonstrates that plant-based milk and drinks are becoming more established in the Spanish market.

Annual household purchase patterns for plant-based milk and drinks in Spain, 2023-2025 (% of households)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Spain. The data covers ‘Take Home’ shopping and comes from a sample of 12,000 households. Data covers plant-based milk and drinks (bebidas vegetales).

Household purchase patterns for plant-based milk and drinks in Spain: proportion of sales value from discounter stores, 2023-2025 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Spain. The data covers 'Take Home' shopping and comes from a sample of 12,000 households. Data covers plant-based milk and drinks (bebidas vegetales).

The share of sales value from discounter stores such as Aldi and Lidl fell from 19.0% in 2023 to 16.7% in 2024, and then fell slightly again in 2025.⁶ It is possible that the growth of affordable private-label products in non-discounter supermarkets means there is less incentive for price-sensitive shoppers to seek out products from discounter stores. The growth in some more expensive segments noted in the Circana data above also suggests that perceived quality may be the key purchase driver in the plant-based milk and drinks category.

⁶ Note that these figures are lower than those reported in the previous edition of this report due to refinement and updating of the dataset by NIQ, including an expansion of the sample size from 8,000 to 12,000 households.

Plant-based cheese

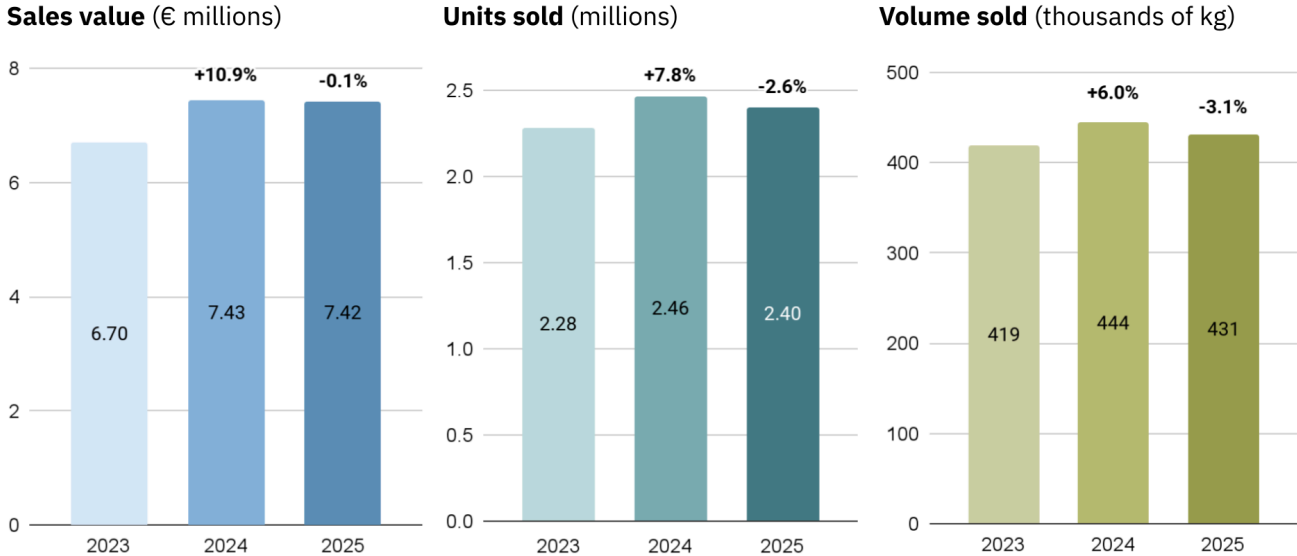
Total market

Demand for plant-based cheese in Spain fell in 2025 following a peak in 2024.

Annual sales value remained steady in 2025 at €7.42 million, 10.8% higher than in 2023. Unit sales fell by 2.6% to 2.40 million units, after a rise of 7.8% in 2024. Sales volume fell by 3.1% to 431,000 kg, after a 6.0% rise in 2024.

The greater fall in sales volume in 2025, compared with sales value, shows that average prices per kg increased.

Plant-based cheese sales in Spain, 2023-2025

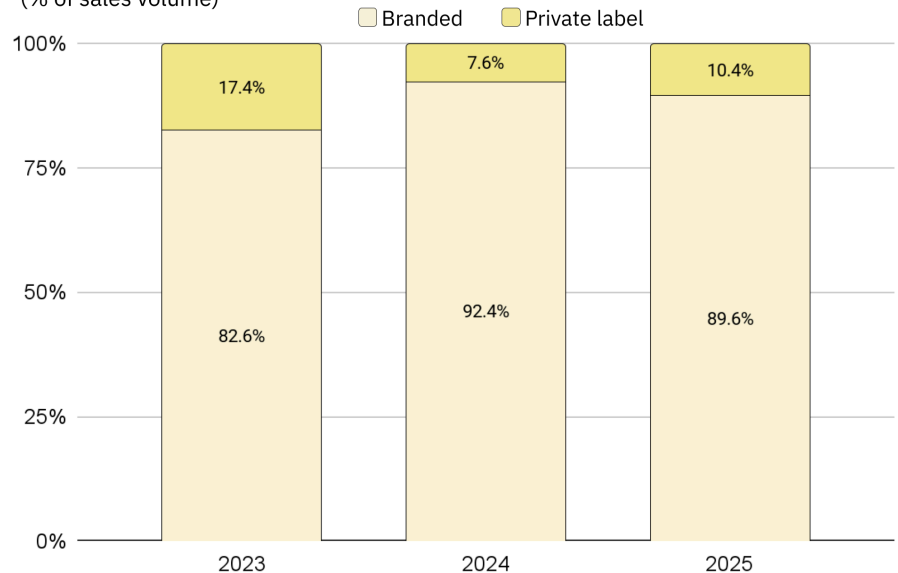


Branded versus private label

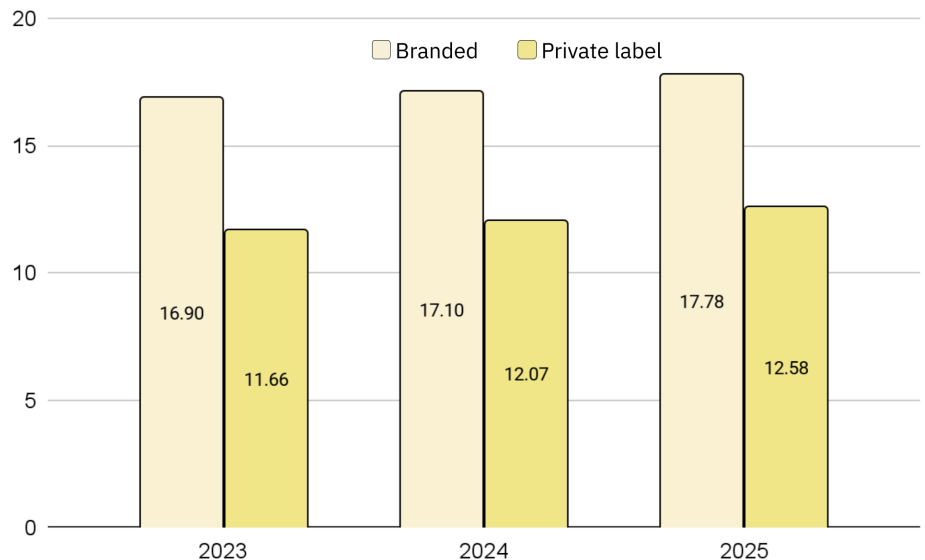
The majority of Spain's plant-based cheese market consists of branded products. The sales volume of private-label products fell from 17.4% in 2023 to 7.6% in 2024, before rising to 10.4% in 2025.

Private-label products had a price advantage, at 29% cheaper per kg in 2025. That they make up such a small proportion of overall sales suggests either that retailers have not seen the plant-based cheese category as being large enough yet to develop a wider range of their own products or that, in this emerging market, factors such as taste and texture are more important drivers of purchasing decisions than price.

Spain plant-based cheese sales by branded or private label, 2023-2025
(% of sales volume)



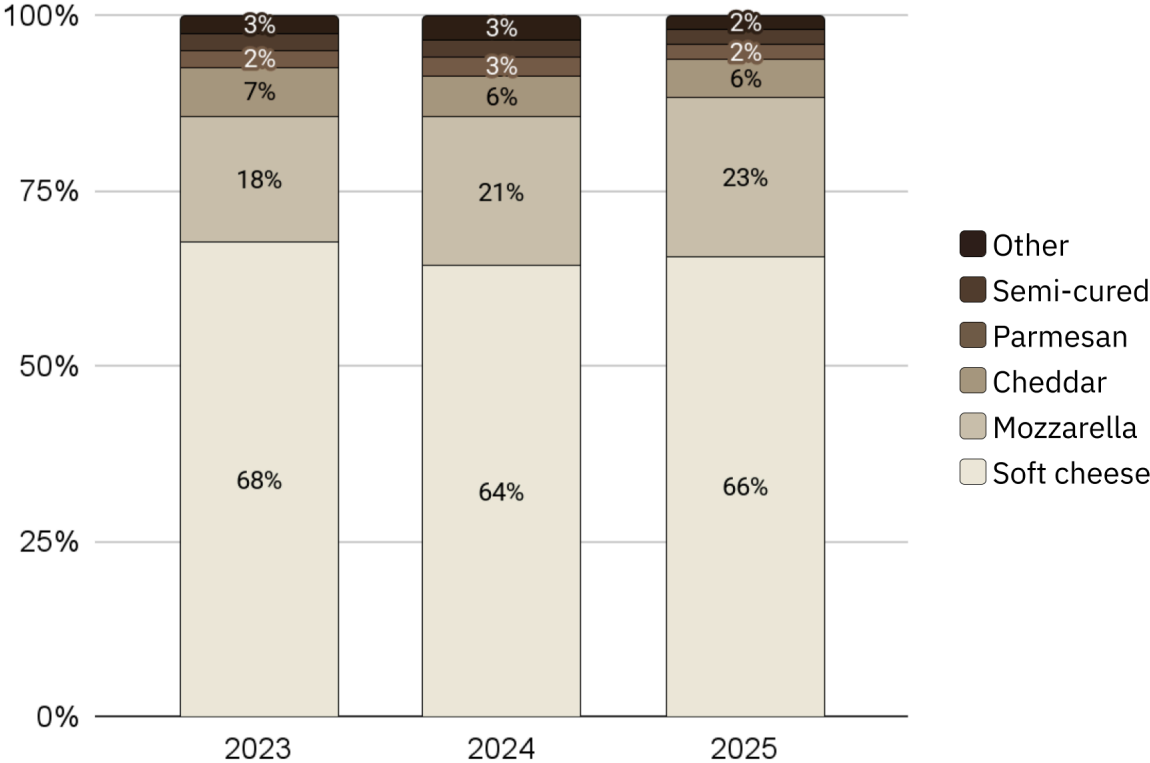
Average price per kg of plant-based cheese in Spain, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

Soft cheese accounted for two-thirds of sales volume in 2025. There was growth in mozzarella-style plant-based cheeses from 18% in 2023 to 23% in 2025.

Spain plant-based cheese sales by type, 2023-2025 (% of sales volume)

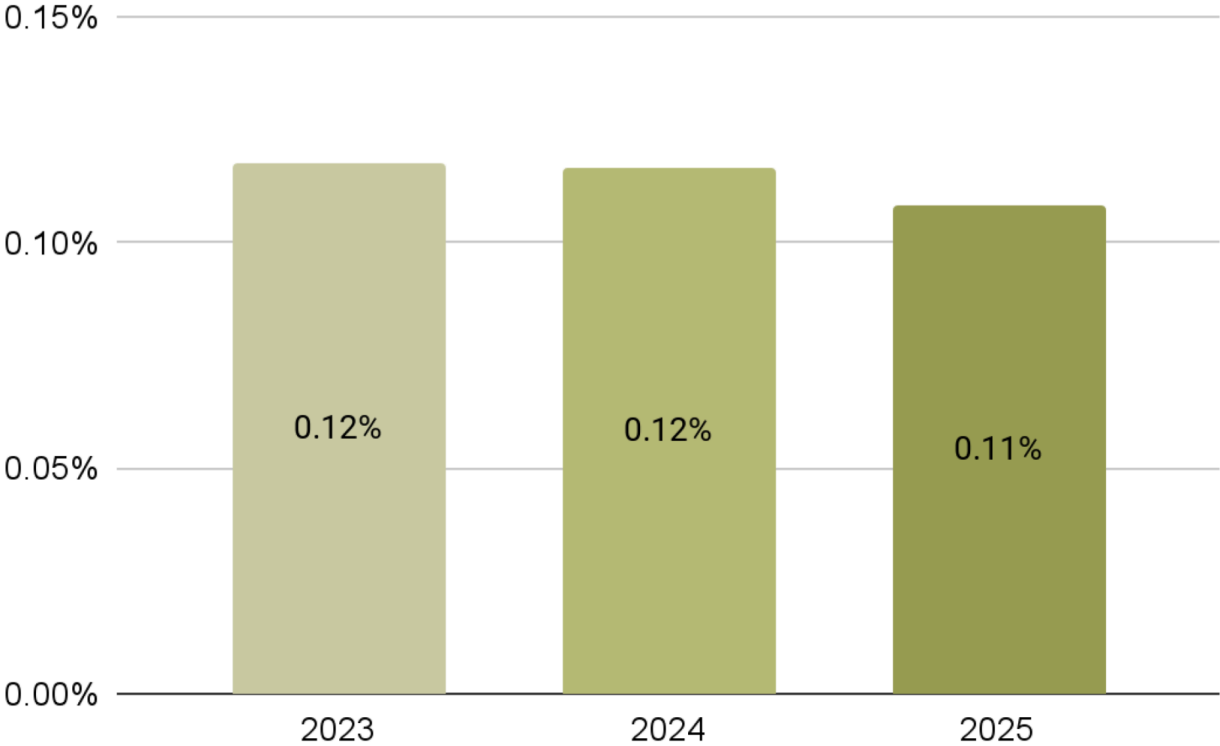


Market share

Plant-based cheese represented a tiny fraction of the overall market for plant-based and animal-based cheese in Spain, at just 0.11% in 2025. The sales volume of animal-based cheese rose by 11.6% between 2023 and 2025, while the sales volume of plant-based cheese rose by just 2.8%.

A study conducted by [NECTAR](#) in the United States showed there was a large gap in the performance of plant-based and animal-based cheeses. They found 66%, 74% and 78% of participants liked animal-based cheddar, cream cheese and mozzarella, respectively, compared with just 40%, 33% and 22% liking the respective plant-based versions. Although this study did not include Spanish products or consumers, it indicates the need for significant research and innovation to improve product performance if plant-based cheese is to achieve a greater market share.

Plant-based cheese: share of Spain's total (plant- and animal-based) cheese market, 2023-2025 (% of sales volume)

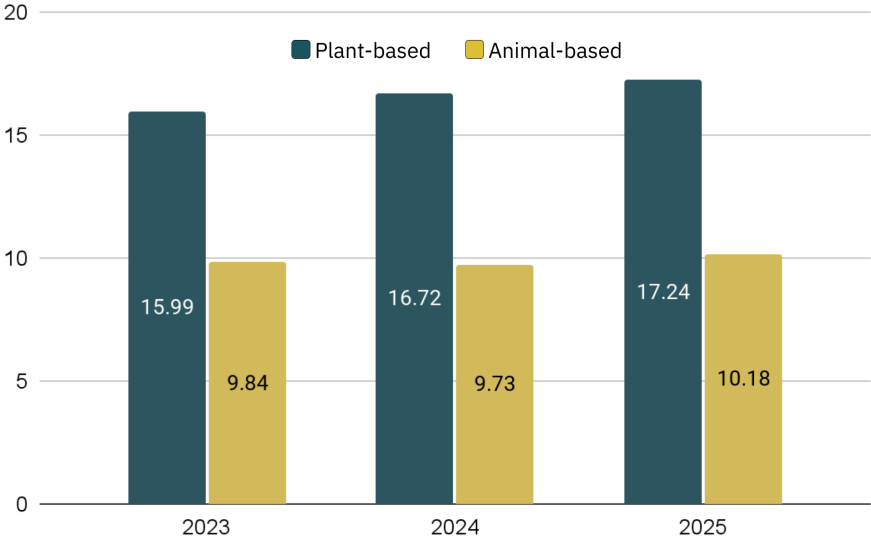


Price trends relative to animal equivalent

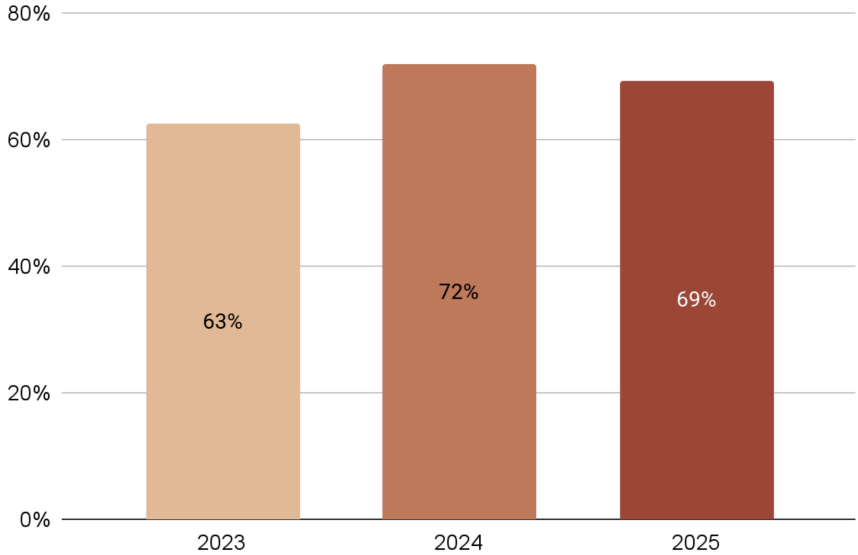
Plant-based cheese remained significantly more expensive than animal-based cheese, at 69% more expensive per kg in 2025. The price gap peaked in 2024.

While the price of animal-based cheese fluctuated, the price of plant-based cheese rose by 8% between 2023 and 2025.

Average price per kg for plant-based and animal-based cheese in Spain, 2023-2025 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in Spain, 2023-2025 (% difference based on €/kg)



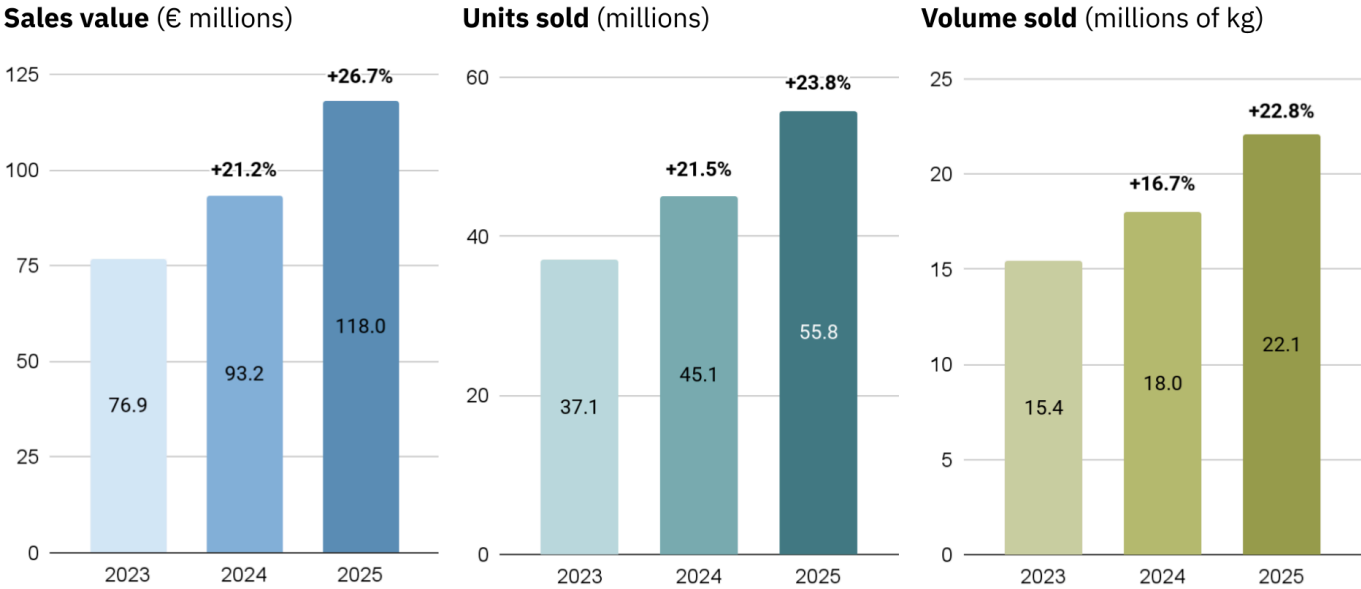
Plant-based yoghurt

Total market

Sales of plant-based yoghurt in Spain grew strongly, with demand accelerating amid a broader increase in demand for yoghurt. Plant-based yoghurt sales were primarily driven by rising sales of branded products.

In 2025, annual sales value reached €118 million, up by 26.7% from 2024 and by 53.5% from 2023. Unit sales grew 23.8% to 55.8 million in 2025, 50.5% higher than in 2023. Sales volume reached 22.1 million kg in 2025, up 22.8% from 2024 and 43.3% from 2023.

Plant-based yoghurt sales in Spain, 2023-2025

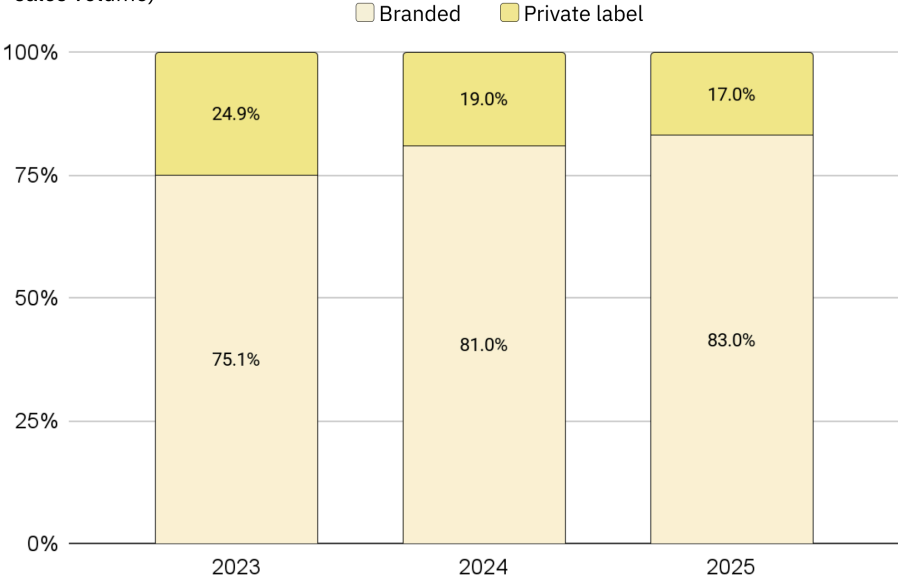


Branded versus private label

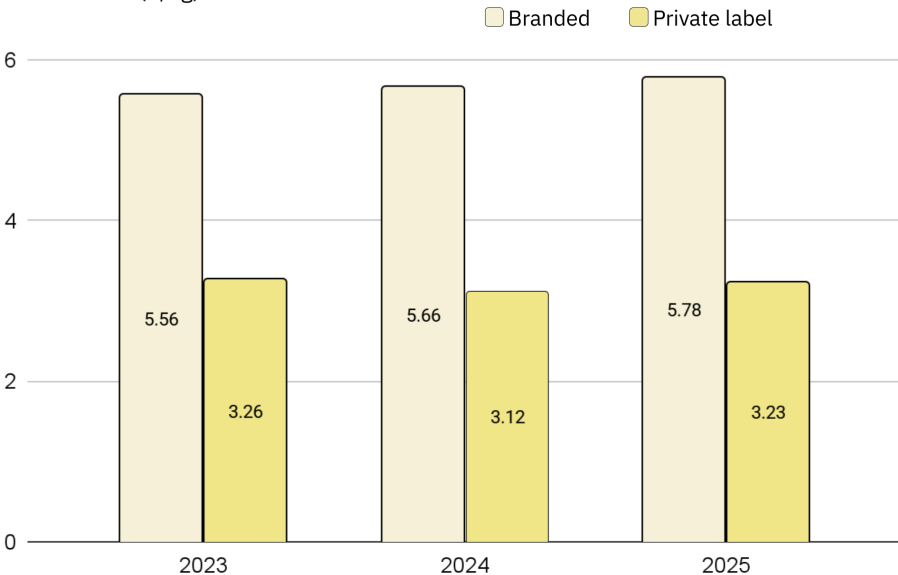
The sales volume of private-label plant-based yoghurt fell by 2.4% between 2023 and 2025, while branded sales volume rose by 58%. As a result, the share of private-label sales volume fell from one-quarter in 2023 to 17% in 2025.

Private-label products were 44% cheaper per kg than branded products in 2025. Since their sales fell despite this significant price advantage, it is likely that consumers were drawn towards the relatively expensive branded products by other factors such as taste or nutrition. It is also possible that since yoghurt is less of a staple category than, say, milk, consumers are willing to spend more on indulgent products.

Spain plant-based yoghurt sales by branded or private label, 2023-2025 (% of sales volume)



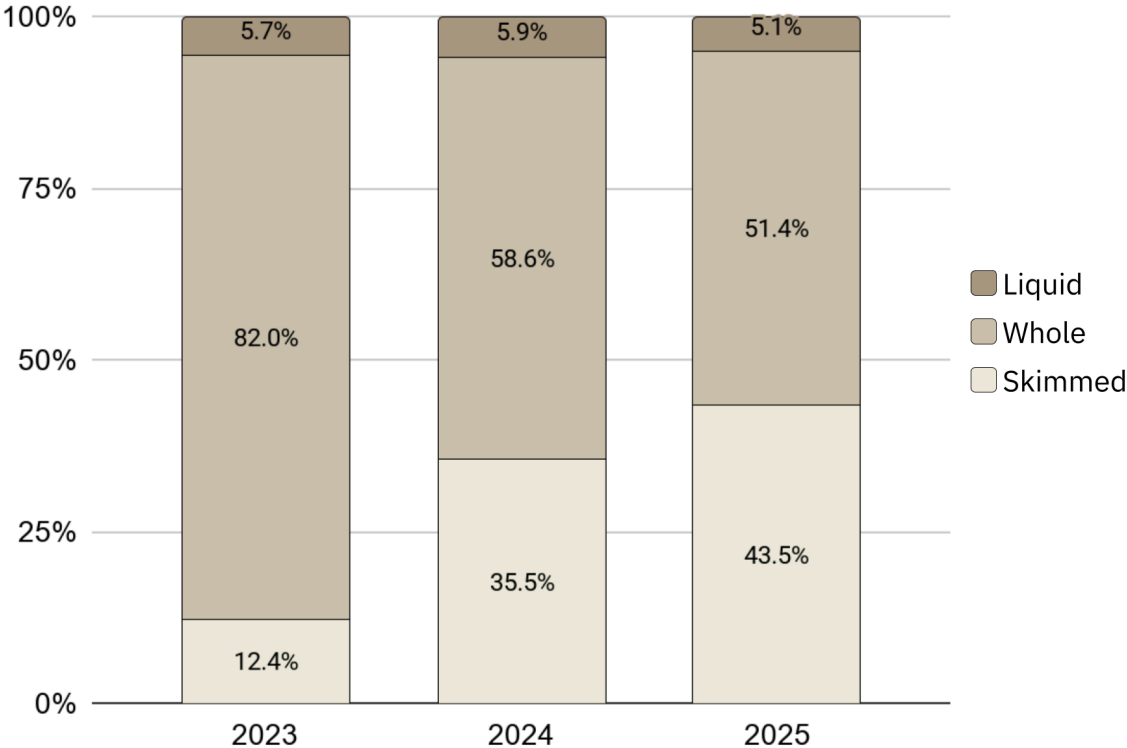
Average price per kg of plant-based yoghurt in Spain, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

Skimmed plant-based yoghurt products more than tripled their market share between 2023 and 2025, suggesting that health is a major driver of product innovation and purchase choices.

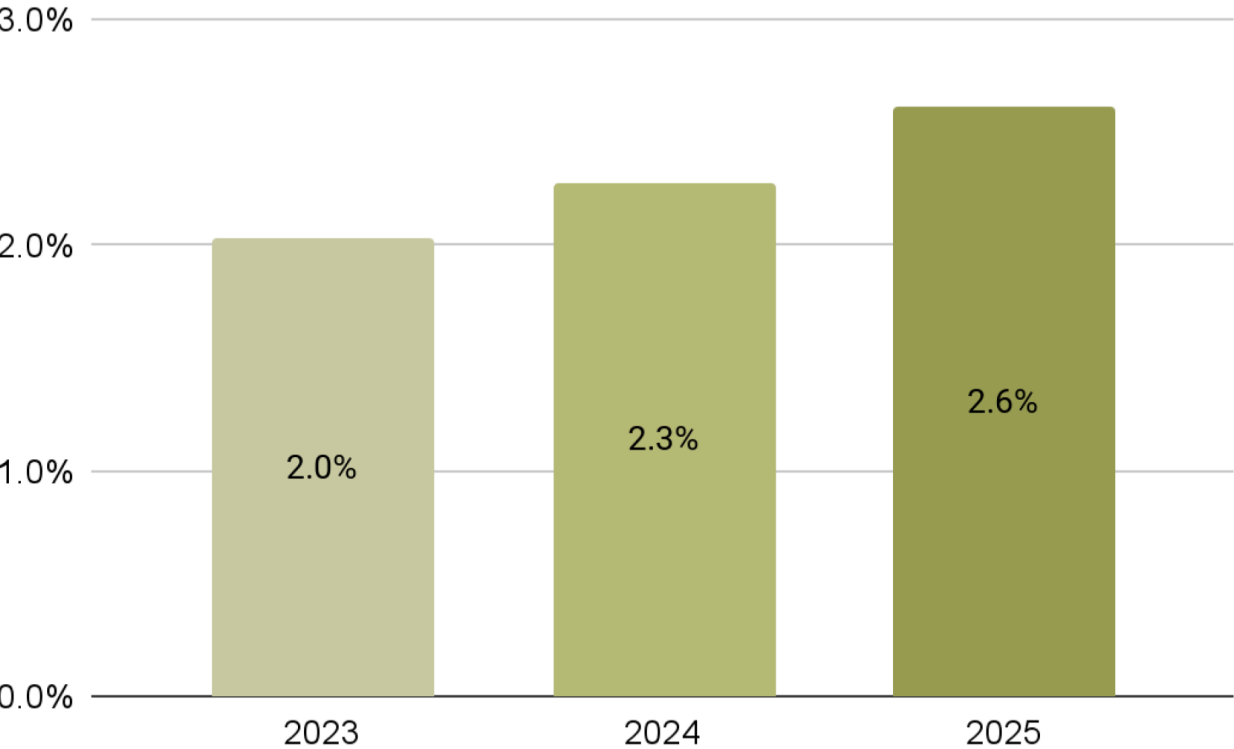
Spain plant-based yoghurt sales by type, 2023-2025 (% of sales volume)



Market share

The absolute sales volume of plant-based yoghurt grew at a higher rate between 2023 and 2025 (+43%) than that of animal-based yoghurt (+11%). The market share of plant-based yoghurt therefore rose from 2.0% to 2.6% of all yoghurt sales, indicating that the category is small but growing.

Plant-based yoghurt: share of Spain's total (plant- and animal-based) yoghurt market, 2023-2025 (% of sales volume)



Price trends relative to animal equivalent

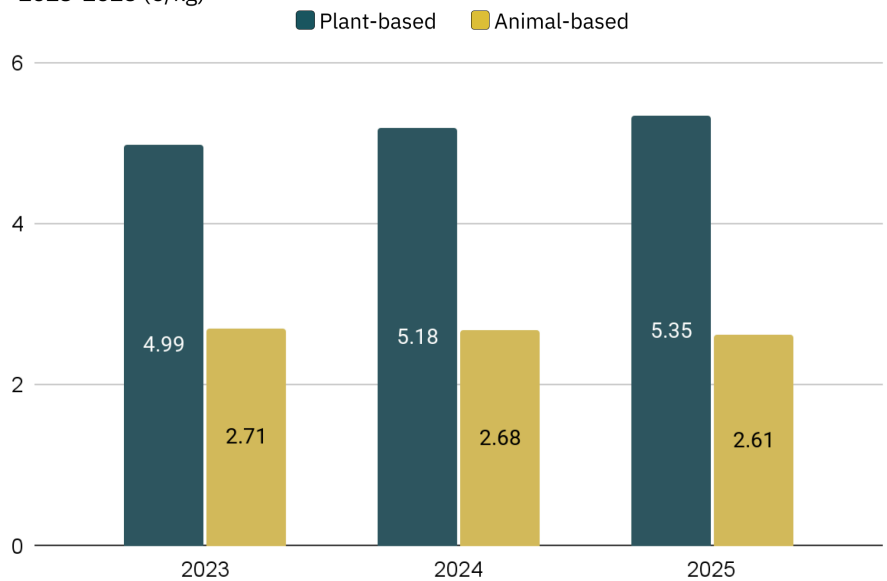
The price of plant-based yoghurt rose between 2023 and 2025, while animal-based yoghurt became cheaper. By 2025, plant-based yoghurt was more than twice as expensive per kg as animal-based yoghurt.

When comparing only branded products, plant-based options were 40% more expensive in 2025. For private-label products, the gap was 57%.

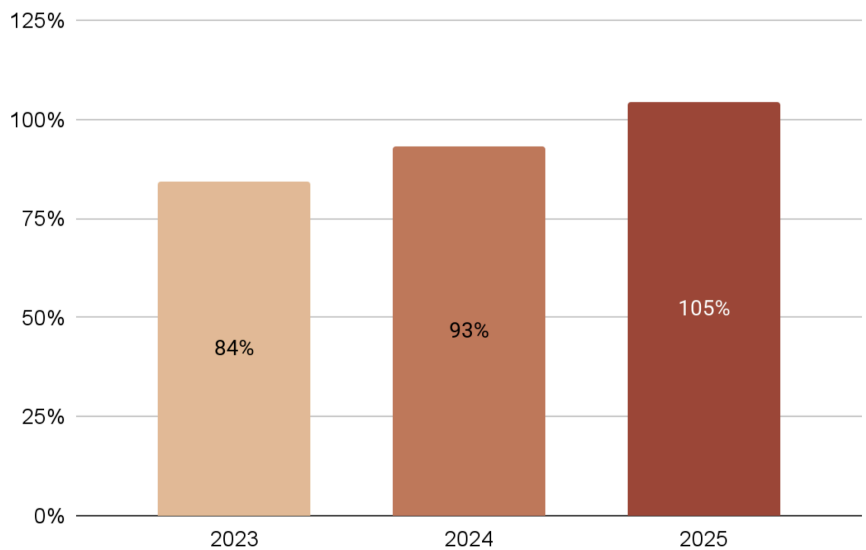
The larger overall price gap of 105% in 2025 can be attributed to the plant-based category having a larger share of branded sales, whereas for animal-based yoghurt, private-label products make up the majority of sales.

The ongoing growth of plant-based yoghurt despite its clear price premium indicates that underlying demand is strong.

Average price per kg for plant-based and animal-based yoghurt in Spain, 2023-2025 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in Spain, 2023-2025 (% difference based on €/kg)



Closing remarks

Spain's plant-based market continued its steady overall growth in 2025, with sales of higher-priced branded products recovering.

However, the market remains skewed towards plant-based milk and drinks, which are approaching mainstream status and are frequently bought by many Spanish households.

The challenges faced by the plant-based meat and cheese categories indicate that further work needs to be done to ensure that products meet the expectations of Spanish consumers regarding taste, price and nutrition. In particular, Spain's plant-based meat sector may be being held back by a larger price gap with animal-based meat, compared with other countries.

Helen Breewood,

Senior Market and Consumer Insights Manager, the Good Food Institute Europe



While Spanish consumers continue to show an appetite for plant-based foods, price and taste remain the key barriers holding back wider adoption. Turning that curiosity into everyday choices will require greater public investment in research and infrastructure to unlock the sector's full potential – delivering benefits for climate, public health, and food system resilience. At the same time, companies must continue to optimise their products to meet consumer expectations on taste, nutrition, and affordability.

Carlos Campillos Martínez,

Senior Regional Manager, Spain and Portugal, the Good Food Institute Europe



About the Good Food Institute Europe

[The Good Food Institute Europe](#) is a nonprofit think tank helping to build a more sustainable, secure and just food system by diversifying protein production.

We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

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