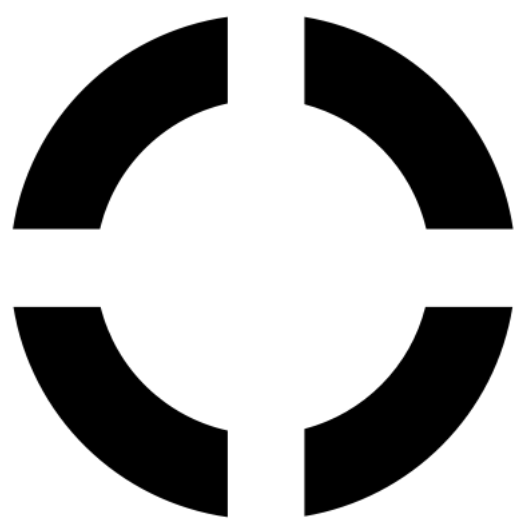




The Ham Market Spain

Mise à jour: 03/12/2024



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Market overview

1.1 Introduction

Ham is the cured or cooked preparation of the pork leg or shoulder. The ham market is a component of the charcuterie industry. It should be noted that this study concerns **exclusively pork ham**, and therefore excludes "poultry ham".

In Spain, there are two specific types of ham: white ham, made from white (pink) pigs, and Iberian ham, made from Iberian pigs. While the former is not specific to Spain, the latter, **Iberian ham, reflects the unique history, know-how and flavors of Spanish culture**. Iberian ham is thus characterized as a luxury product with high added value, exported worldwide.

The market continues to expand. At national level, sales are set to **rise by 9.73% between 2019 and 2023**, despite the COVID-19 pandemic. When we focus on the **Iberian ham** segment, the increase is even greater, with sales **up 22.50%**, thanks in particular to **new international outlets**.

Market overview

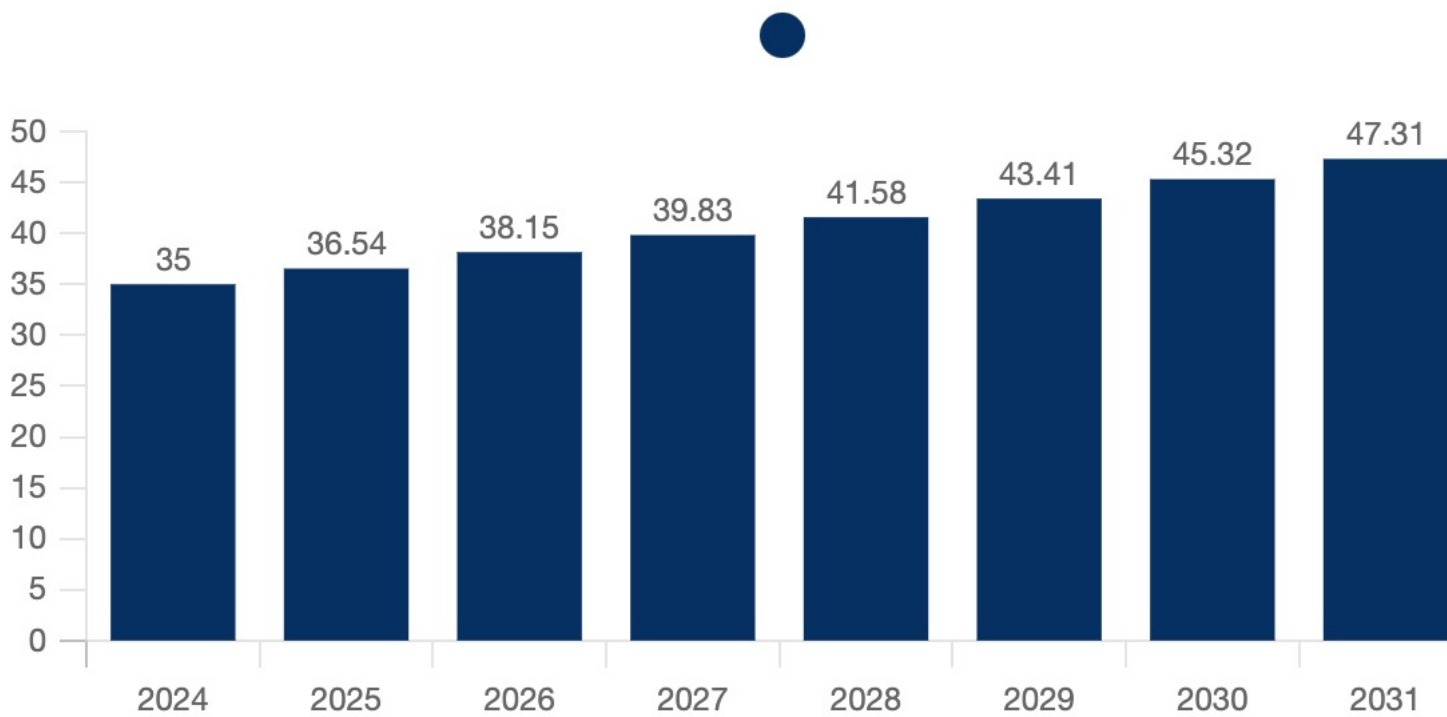
1.2 The global market

The global ham market is set for sustained growth between 2024 and 2032, with an estimated CAGR of **4.4%**. In 2024, the market is valued at **\$35 billion**, and should reach **\$49.39 billion** in 2032, representing an overall increase of **41.1%** over the period.

This steady growth translates into annual increases, with projected values of **\$36.54 billion** in 2025, **\$38.15 billion** in 2026, and **\$45.32 billion** in 2030. This dynamic is driven by several factors: growing demand in emerging markets, constant innovation in charcuterie products, and a growing preference for premium products in developed countries.

Global ham market forecasts

World, 2024-2032, \$ billion



Source: [Market Data Forecast](#)

Market overview

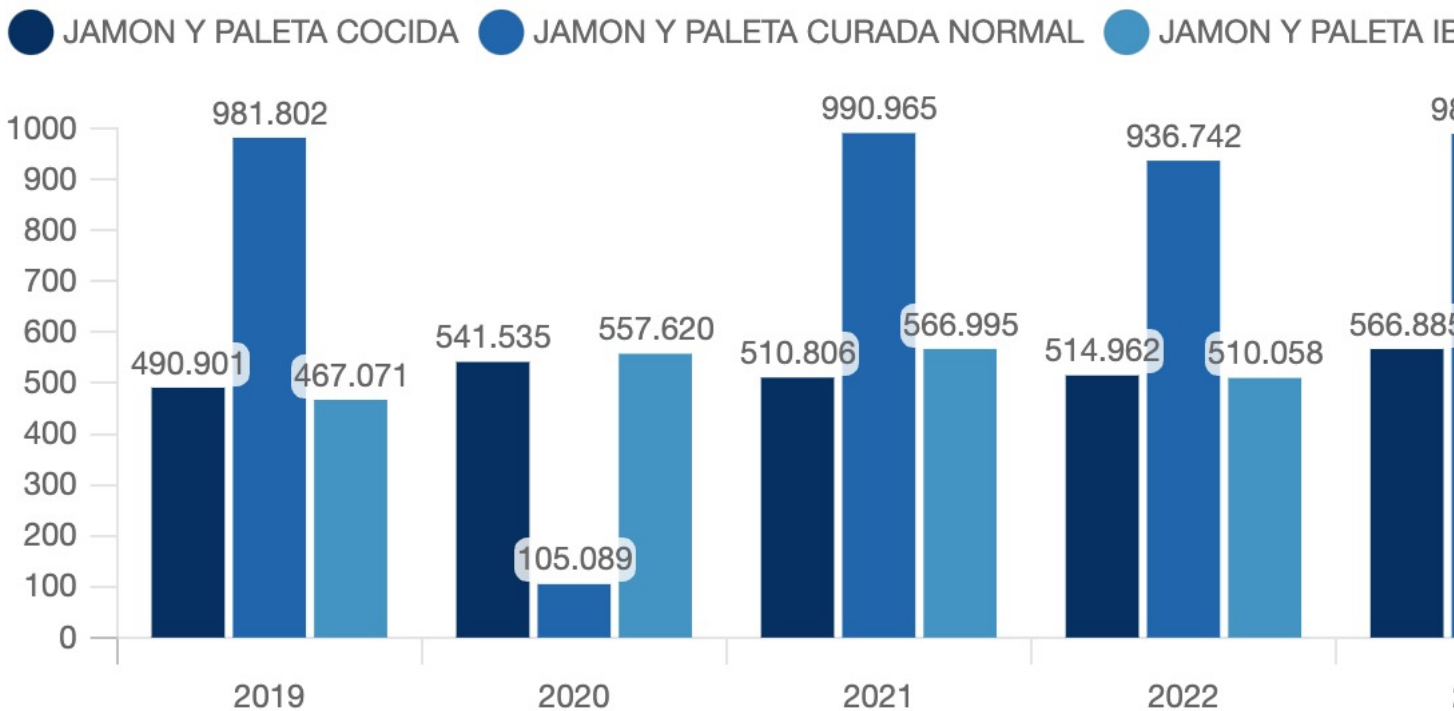
1.3 The domestic market

Between 2019 and 2023, ham sales in Spain's domestic channel grew overall, from **1939.77 million euros** in 2019 to **2128.49 million euros** in 2023, an increase of **9.73%**. This trend was marked by significant variations by segment.

- **cooked hams and pallets**: this segment showed steady growth, rising from **490.90 million euros** in 2019 to **566.89 million euros** in 2023, an increase of **15.48%** over the period. After a slight decline in 2021 (**-5.67%** on 2020), sales rebounded to reach their highest level in 2023 (**+10.08%** on 2022).
- **classic cured ham and pallet**: this segment has seen fluctuating trends. After peaking in 2020 at **1,050.90 million euros** (**+7.04%** on 2019), it fell in 2021 (**-5.71%**) to **936.74 million euros**, before recovering in 2023 to **989.38 million euros** (**+5.62%** on 2022).
- **iberian ham and palette**: this segment has seen the strongest growth. In 2023, sales amounted to **572.23 million euros**, compared with **467.07 million euros** in 2019, an increase of **22.50%**. Despite a slight decline in 2022 (**-10.04%** vs. 2021), the segment reached a new peak in 2023 (**+12.18%** vs. 2022).

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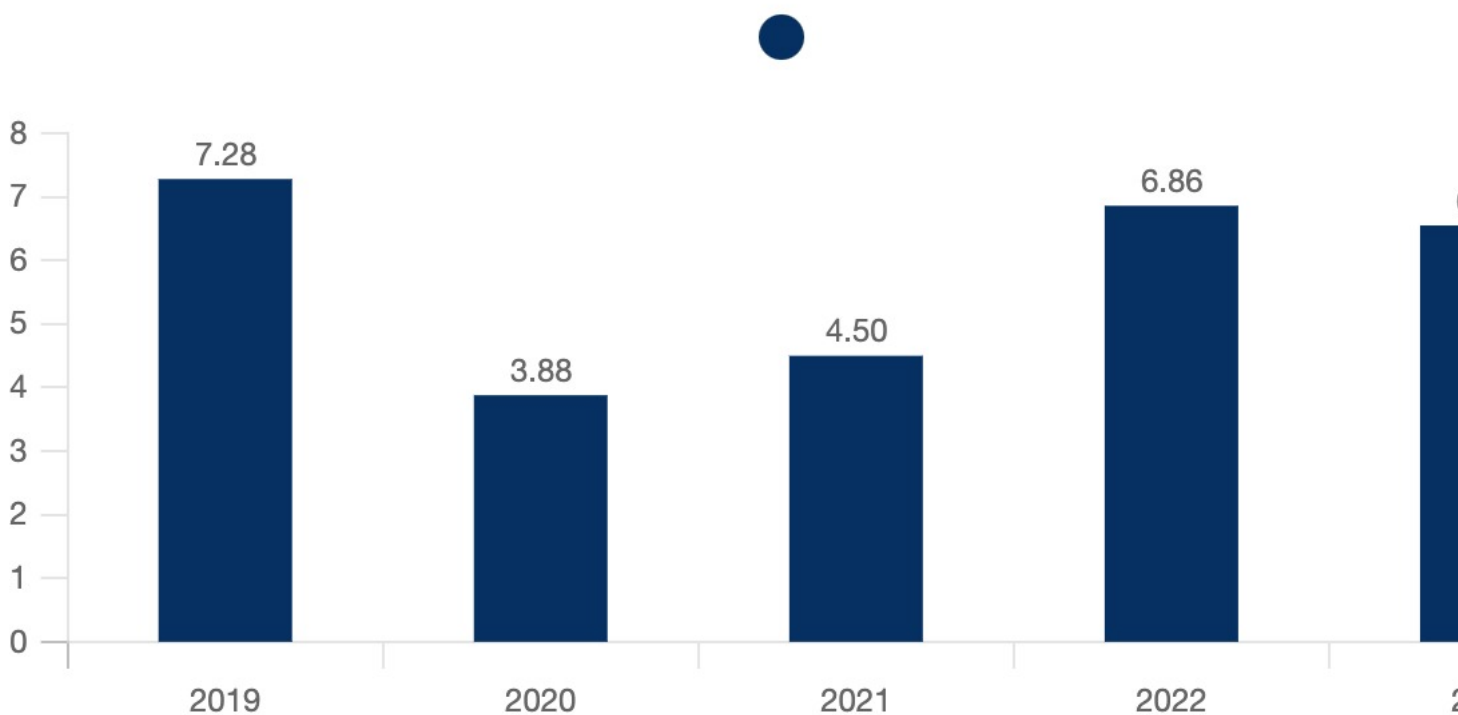
These figures show that, although there have been fluctuations over the period, the Spanish ham sector continues to grow thanks to sustained demand for its various segments, in particular Iberian ham and shoulder, which stands out as the product with the highest added value.



Ham consumption in the HORECA (Hotels, Restaurants, Cafés) channel in Spain has seen significant variations between 2019 and 2023. In 2019, consumption was 7.28 million kg. This dropped significantly in 2020, to 3.88 million kg, down **(46.4%)** on 2019, mainly due to the COVID-19 pandemic that affected business in the HORECA sector. In 2021, consumption rose slightly to 4.50 million kg, representing an increase of **(16%)** on 2020. In 2022, a more marked recovery took place with 6.86 million kg, up **(52.7%)** on 2021, marking the sector's recovery from the health restrictions. In 2023, consumption fell slightly to 6.55 million kg, down **(4.5%)** on 2022, but still high compared with previous years. These data show marked fluctuations in ham consumption within the HORECA channel, influenced by economic and health factors.

Ham consumption in the HORECA channel

Spain, 2019-2023, million kg



Market overview

1.4 Foreign trade

Fresh ham:

Between 2019 and 2023, Spanish foreign trade in **hams, shoulders and bone-in cuts, fresh or chilled**, showed a marked change, both in terms of exports and the trade balance. Exports almost doubled over the period, rising from **\$470.13 million** in 2019 to **\$713.96 million** in 2023, an increase of **+51.8%**. This dynamic illustrates the strong development of international demand for these emblematic products.

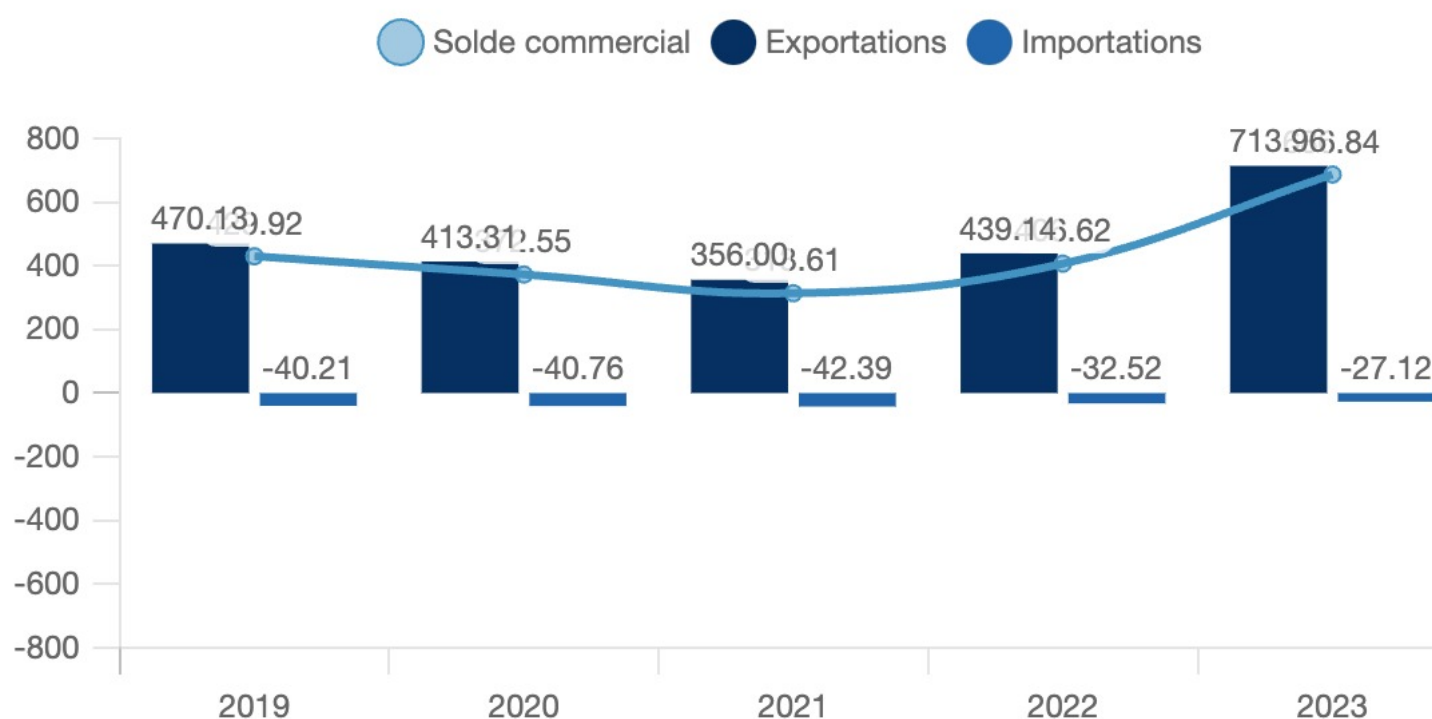
Imports, though modest, have fallen steadily, from **-\$40.21 million** in 2019 to **-\$27.12 million** in 2023, recording a **-32.5%** decline. This trend reflects a reduction in import requirements, probably due to growing self-sufficiency and the competitiveness of local producers.

The **trade balance**, meanwhile, showed impressive progress, increasing by **+59.8%** between 2019(**\$429.92 million**) and 2023(**\$686.84 million**). This improvement was particularly notable between 2022 and 2023, with an increase of **+68.9%**, underlining a recent acceleration in the surplus balance.

This data highlights the strength of the Spanish ham and shoulder industry on the world market, driven by strong export growth and effective import control. This reflects increased competitiveness and growing international recognition for the quality of Spanish products.

Foreign trade of "Hams, shoulders and cuts thereof, bone-in, fresh or chilled."

Spain and the world, 2019-2023, \$ million



Source : [UN comtrade](#)

Exports:

In 2023, Italy was by far Spain's main trading partner for exports of **bone-in hams, shoulders and cuts, fresh or chilled**, accounting for **48.19%** of the total. France came second with **13.23%**, confirming its key role as the second largest market for these Spanish products. The **Czech Republic**, with **9.92%**, completed the podium, underlining the growing importance of Central European markets.

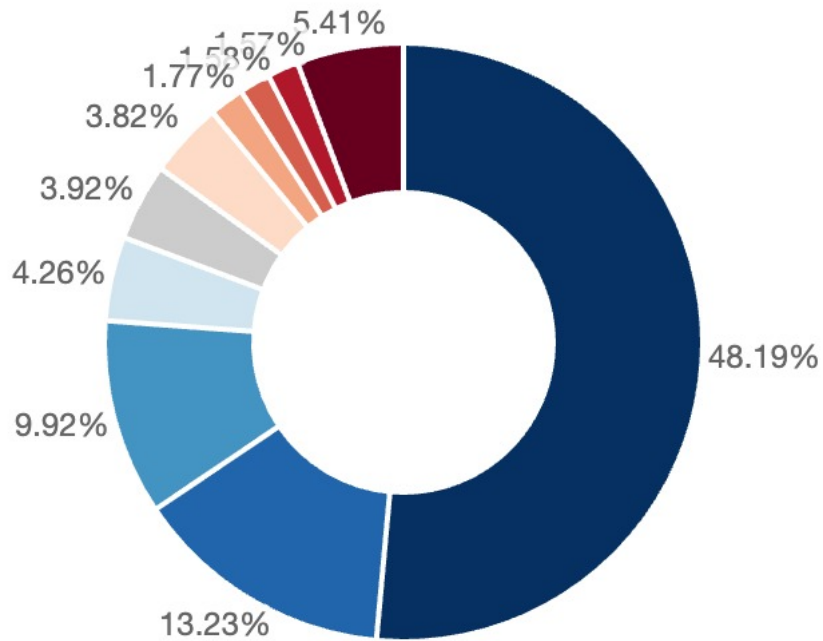
Other notable destinations included **Portugal(4.26%)** and **Romania(4.26%)**, as well as **Slovakia(3.92%)** and **Poland(3.82%)**, testifying to the strong appeal of these products throughout Eastern Europe. Market shares in **Hungary(1.77%)**, **Croatia(1.58%)** and **Greece(1.57%)** were more modest, but illustrated the diversity of Spanish exports in the region.

Finally, the **rest of the world** accounted for **5.41%** of exports, testifying to an international openness beyond the European continent. These data highlight the dominance of European markets in Spanish processed meat exports, with a strong concentration on neighboring markets such as Italy and France, while also revealing opportunities to strengthen trade with other regions.

Spanish exports of "Hams, shoulders and cuts thereof, bone-in, fresh or chilled."

Spain and the World, 2023, M

● Italie ● France ● République Tchèque ● Portugal ● Roumanie ● Slovaquie ● Pol
 ● Hongrie ● Croatie ● Grèce ● Reste du monde



Source : [UN comtrade](https://comtrade.un.org/)

Imports:

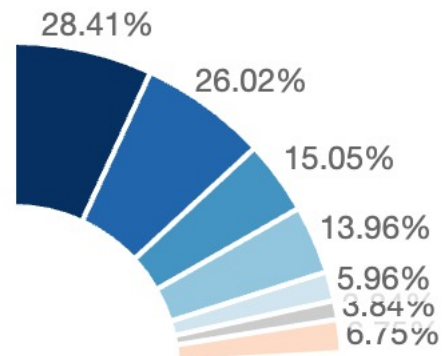
In 2023, Spanish imports of **bone-in hams, shoulders and cuts, fresh or chilled** were dominated by Italy, which accounted for **28.41%** of the total. France followed closely behind with **26.02%**, underlining its key role as a major supplier of these products to Spain. The **Czech Republic**, with **15.05%**, positioned itself as another important player, reinforcing Central Europe's place in trade with Spain.

Portugal(13.96%) and **Romania**(5.96%) also contributed significantly to imports, reflecting active trade with these neighboring and Eastern European countries. **Slovakia**, with **3.84%**, rounded out the main partners, while the **rest of the world** accounted for **6.75%**, highlighting limited but diversified trade beyond Europe.

Spanish imports of "Hams, shoulders and cuts thereof, bone-in, fresh or chilled."

Spain and the world, 2023, %

● Italie ● France ● République Tchèque ● Portugal ● Roumanie ● Slovaquie ● Reste d



Hams, shoulders and cuts thereof, bone-in, frozen :

Between 2019 and 2023, Spain's foreign trade in **frozen bone-in hams, shoulders and cuts** fluctuated significantly, reflecting global market dynamics and changes in demand.

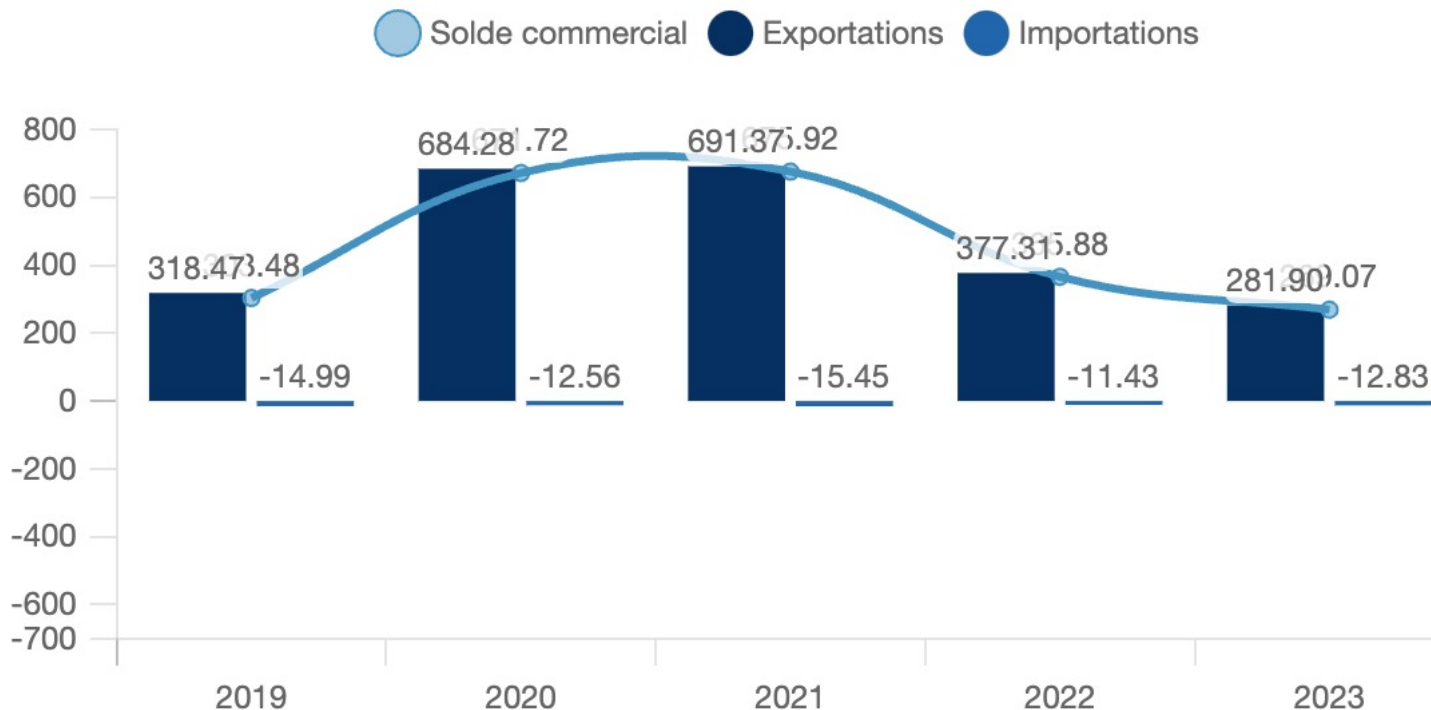
Exports peaked in 2021 at **\$691.37 million**, almost doubling compared with 2019 (**\$318.47 million**), before gradually declining to **\$281.90 million** in 2023, down **-59.2%** on the 2021 peak.

Imports, though marginal, have fluctuated slightly over the years. They have varied between **-\$14.99 million** in 2019 and **-\$12.83 million** in 2023, with a low point of **-\$11.43 million** in 2022, testifying to Spain's low dependence on imports for this type of product.

The **trade balance**, largely in surplus, has followed the same trend as exports. After peaking in 2021 at **\$675.92 million**, it fell to **\$269.07 million** in 2023, down **-60.2%** on its peak. This decrease reflects the contraction in exports, although Spain remains a major net exporter in this segment.

Evolution of foreign trade in "hams, shoulders and cuts thereof, bone-in, frozen."

Spain and the world, 2019-2023, \$ million



Source : [UN comtrade](#)

Exports:

In 2023, Spanish exports of **frozen bone-in hams, shoulders and cuts** were largely dominated by **China**, which accounted for **70.26%** of the total. This figure reflects this market's strong dependence on Spanish products and China's growing importance as a key trading partner in this segment.

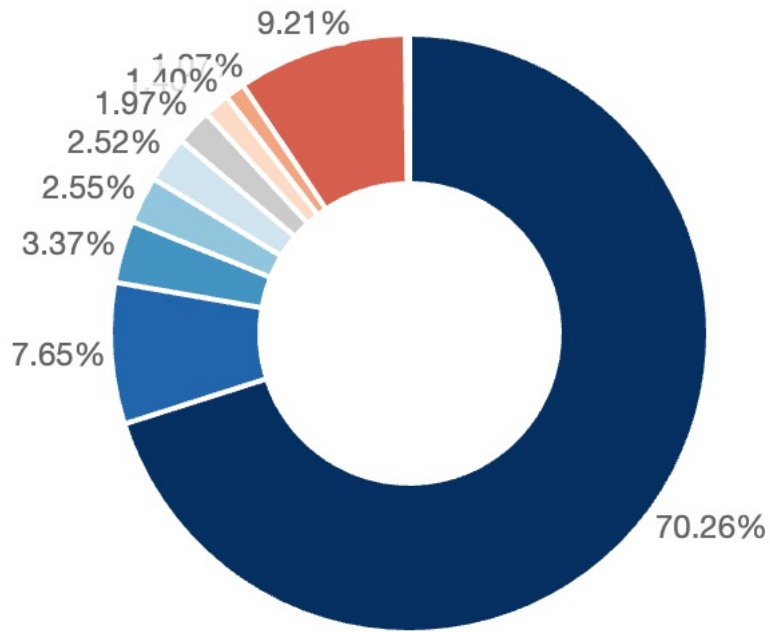
Italy, the second most important destination, contributed **7.65%** of exports, confirming its position as the main European market for these products. Other Asian countries, such as **South Korea(3.37%)**, the **Philippines(2.55%)** and **Malaysia(2.52%)**, also played a significant role, testifying to the appeal of Spanish products in this region.

In Europe, destinations such as **Bulgaria(1.97%)** and **Portugal(1.40%)** made more modest but significant contributions, while **Japan(1.07%)** strengthened the presence of Spanish products in the high-end Asian market.

Finally, the **rest of the world** accounted for **9.21%** of exports, reflecting a diversification of outlets beyond the main Asian and European markets. These figures highlight the dominance of the Asian market, particularly China, in Spanish exports of frozen hams, while underlining growth opportunities in other international markets.

Destination of Spanish exports of frozen bone-in hams, shoulders and cuts thereof.

Spain and the world, 2023, %



Source: [UN comtrade](#)

Imports:

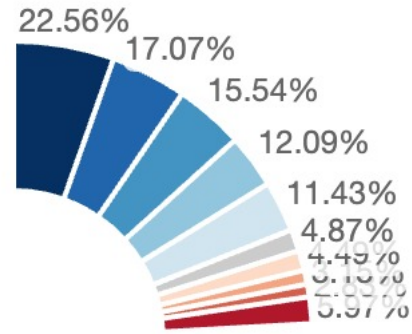
In 2023, Spanish imports of **frozen bone-in hams, shoulders and cuts** came mainly from European countries, with a clear dominance by **Denmark**, which accounted for **22.56%** of total imports. **Germany** followed with **17.07%**, consolidating its position as the second main supplier, while **Poland** occupied third position with **15.54%**, underlining the growing importance of Central Europe in this trade.

Other notable suppliers included **Hungary**(**12.09%**) and **Belgium**(**11.43%**), reinforcing the role of Central and Western European countries. The **Netherlands** and **Portugal** contributed more modestly, with **4.87%** and **4.49%** respectively, while **Italy** accounted for **3.15%**, reflecting a more limited share in Spanish imports.

Europe outside the European Union accounted for **2.83%** of imports, reflecting reduced flows with non-EU countries. Finally, the **rest of the world** accounted for **5.97%**, indicating a limited but significant diversification towards partners outside the European continent.

Origins of Spanish imports of frozen bone-in hams, shoulders and cuts thereof.

Spain and the world, 2023, %



Source: [UN comtrade](https://comtrade.un.org/)

Canned ham :

Between 2019 and 2023, Spanish foreign trade in **prepared or preserved hams and ham cuts** (including cooked, smoked or canned) showed significant variations. **Exports** rose steadily over the period, from **\$22.683 million** in 2019 to **\$36.247 million** in 2023, representing growth of **+59.9%**. This increase reflects growing international demand for quality Spanish products.

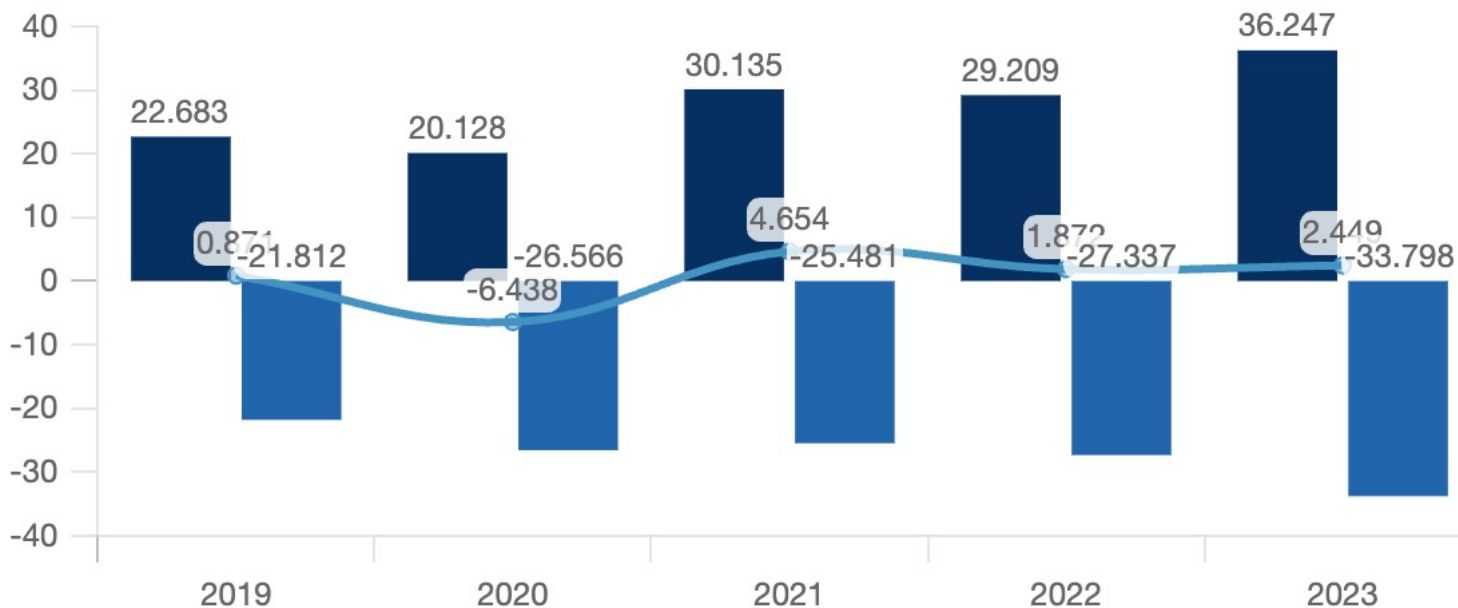
On the other hand, **imports** have also risen, from **-\$21.812 million** in 2019 to **-\$33.798 million** in 2023, an increase of **+55.0%**. This increase in imports indicates an opening up of the Spanish market to processed products from other countries.

The **trade balance**, although positive in three of the five years, has shown considerable volatility. In 2019, it stood at **\$0.871 million**, before turning into a deficit in 2020 at **-\$6.438 million** due to a sharp rise in imports. In 2021, it returned to surplus at **\$4.654 million**, before falling back to **\$1.872 million** in 2022, finally reaching **\$2.449 million** in 2023, an increase of **+30.8%** on 2022.

Foreign trade in "Hams and cuts thereof, prepared or preserved (including cooked, smoked or preserved)."

Spain and the World, 2019-2023, \$ million

● Solde commercial ● Exportations ● Importations



Source : [UN comtrade](https://comtrade.un.org/)

Exports:

In 2023, Spanish exports of **canned ham** were largely dominated by European destinations, with **Portugal** and **France** leading the way, accounting for **21.33%** and **21.19%** of total exports respectively. These two neighboring countries, closely linked to Spain by their geographical proximity and historical trade, were the main outlets for this product.

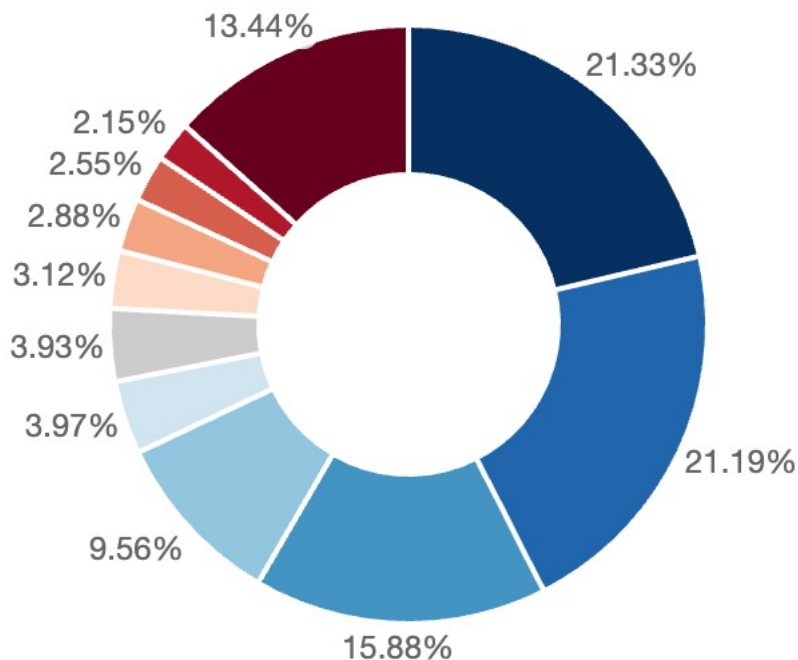
Germany came third with **15.88%**, confirming the importance of the European market for Spanish exporters. Outside Europe, more specific markets such as **Cuba**(**9.56%**) and **Lebanon**(**3.93%**) also showed notable demand, reflecting the appeal of Spanish products in more remote regions.

Among other destinations, **Andorra**(**3.97%**), **Italy**(**3.12%**), the **USA**(**2.88%**) and the **UK**(**2.55%**) accounted for smaller but significant shares, reflecting a diversification of exports. **Romania** and the **rest of the world** contributed **2.15%** and **13.44%** respectively, underlining the interest in canned ham in smaller or emerging markets.

Destinations of Spanish canned ham exports

Spain and Ide

● Portugal ● France ● Allemagne ● Cuba ● Andorre ● Liban ● Italie ● Etats-Unis d' ● Royaume-Uni ● Roumanie ● Reste du monde



Source: [UN comtrade](#)

Imports:

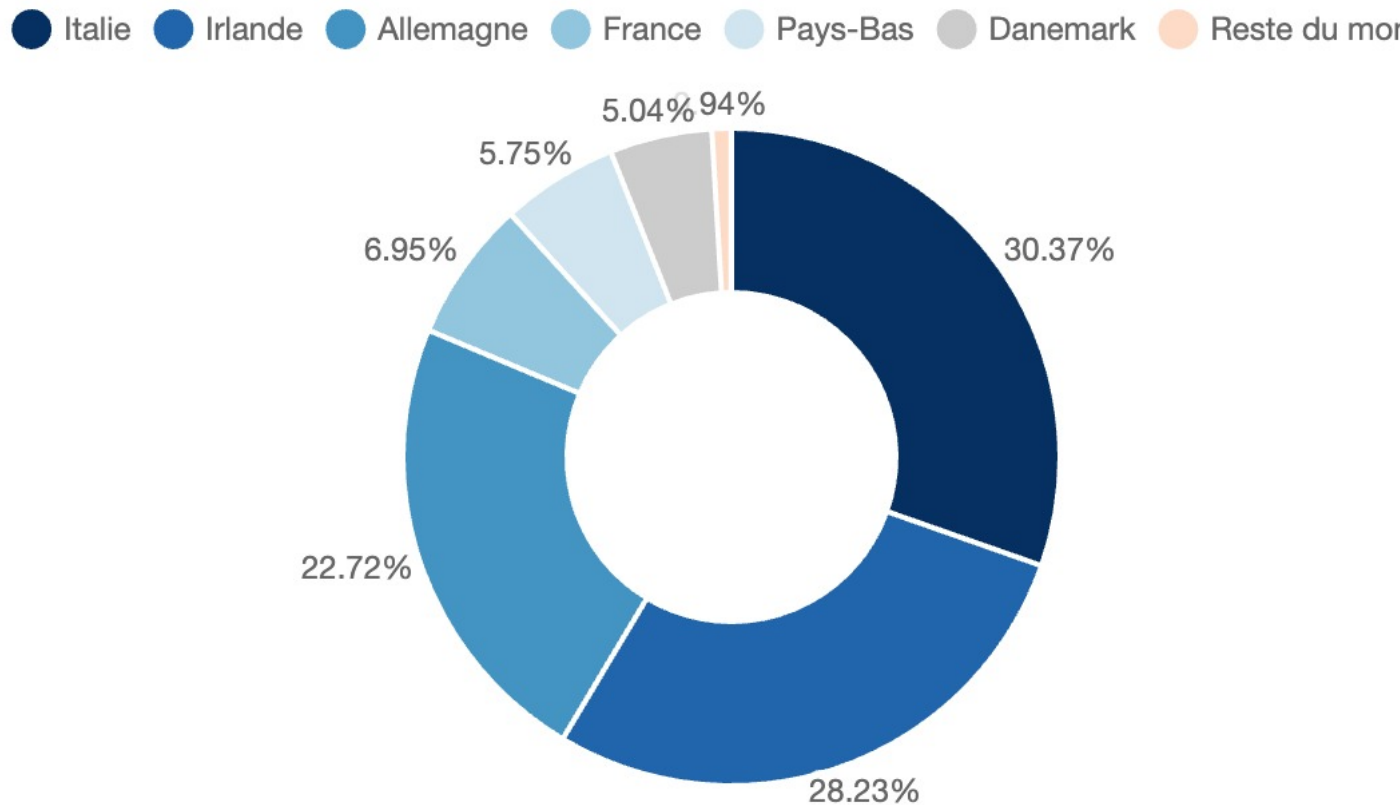
In 2023, Spanish imports of **canned ham** were heavily concentrated on European partners. **Italy** was the main supplier, accounting for **30.37%** of total imports, closely followed by **Ireland (28.23%)** and **Germany (22.72%)**. These three countries dominated trade, underlining their key role in supplying Spain with canned ham.

France contributed **6.95%**, while the **Netherlands (5.75%)** and **Denmark (5.04%)** had smaller but still significant shares. The **rest of the world**, with just **0.94%**, played a marginal role in imports, demonstrating Spain's low dependence on non-European suppliers for this type of product.

These data illustrate the strong predominance of intra-European trade in Spanish imports of canned ham, with a marked concentration on a few main partners, notably Italy, Ireland and Germany.

Breakdown of Spanish canned ham imports

Spain, 2023, % of total



Source: [UN comtrade](#)

Cured and smoked ham:

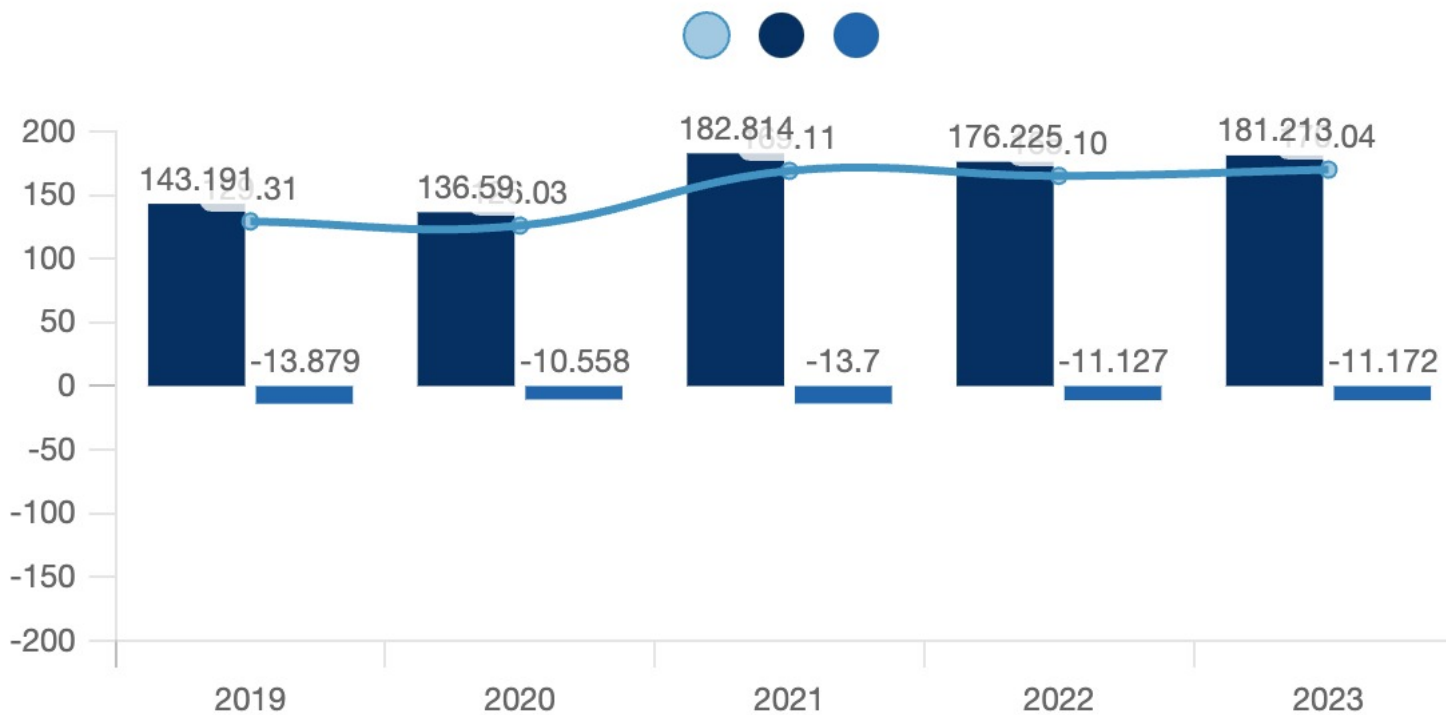
Between 2019 and 2023, Spanish foreign trade in **pork meats, salted or in brine (including hams and shoulders)** showed a notable increase in exports, although imports remained relatively modest. **Exports** rose by **26.5%** over the period, from **\$143.191 million** in 2019 to **\$181.213 million** in 2023. This increase reflects growing international demand for these traditional Spanish products.

Imports, meanwhile, remained low and stable, varying between **-\$13.879 million** in 2019 and **-\$11.172 million** in 2023. This low dependence on imports underlines Spain's ability to produce cured or brined pork locally to meet domestic and international demand.

The **trade balance** thus maintained a significant surplus throughout the period, peaking in 2021 at **\$169.11 million**, before stabilizing at around **\$170.04 million** in 2023, up **31.5%** on 2019. This commercial performance reflects the competitiveness of Spanish producers on the world market.

Foreign trade in "Pork meat, salted or in brine (including hams and shoulders)."

Spain and the World, 2019-2023, \$ million



Source : [UN comtrade](#)

Exports:

In 2023, Spanish exports of **salted or cured pork meats, including hams and shoulders**, were spread across a variety of markets, with a strong concentration on European and Asian destinations. **Portugal** was the main outlet, accounting for **16.61%** of total exports, followed by **China(13.35%)**, which confirmed its role as a key partner due to its growing demand for processed pork products.

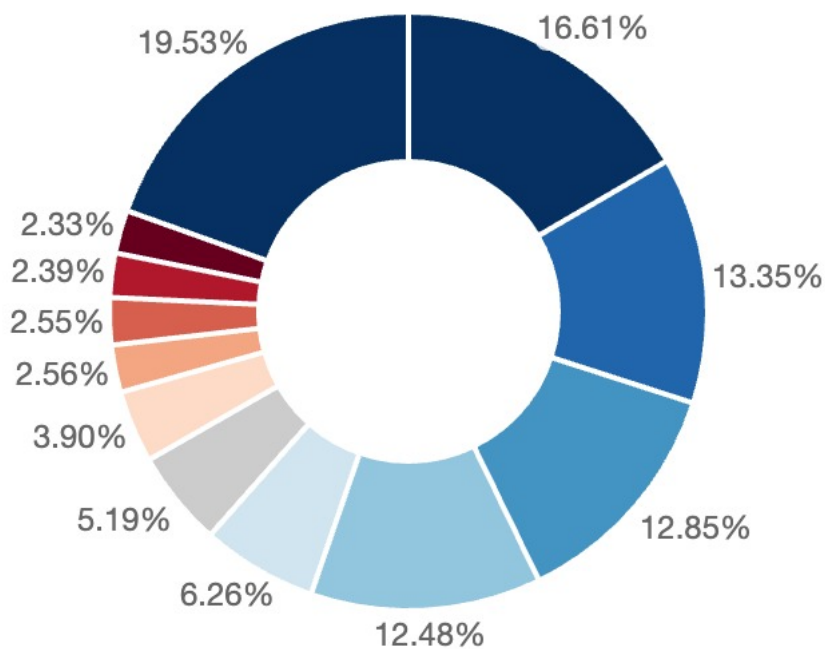
Italy(12.85%) and **France(12.48%)** were also important destinations, reflecting geographical proximity and close trade with these two European neighbors. **Germany**, with **6.26%**, rounded out the top 5 major markets.

Outside Europe, the **United States(5.19%)** and **Mexico(3.90%)** stood out as significant markets in America, illustrating the appeal of Spanish products in this region. The **Netherlands(2.56%)** and **Ukraine(2.55%)** made more modest but significant contributions, while **Belgium(2.39%)** and **Japan(2.33%)** consolidated their positions in Spanish exports.

The **rest of the world**, accounting for **19.53%**, testifies to the diversification of destinations, with flows to emerging markets and those less traditional for Spanish products. These figures reflect the competitiveness of Spanish pork meats on the world market, underpinned by strong European demand and constant expansion into Asian and American markets.

Spanish export destinations for "Pork meats, salted or in brine (including hams and shoulders)"

Spain and the world, 2023, %



Source: [UN comtrade](#)

Imports:

In 2023, **Spanish imports of salted, cured, smoked or similar ham** were mainly dominated by European countries, with **Germany** in the lead, accounting for **24.21%** of total imports. **Italy**, the second largest supplier, contributed **20.40%**, reinforcing the predominance of our two main European partners.

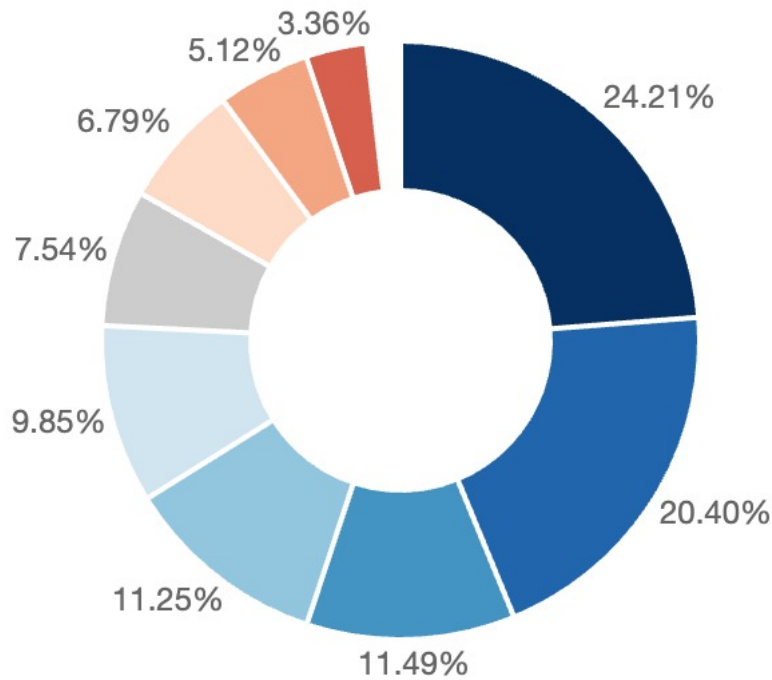
Imports from **Europe outside the European Union** accounted for **11.49%**, a significant percentage that illustrates the diversification of trade beyond EU borders. **Portugal** (**11.25%**) and **France** (**9.85%**) also played an important role, consolidating their positions among Spain's main trading partners.

Among other suppliers, **Denmark** (**7.54%**), the **Netherlands** (**6.79%**) and **Poland** (**5.12%**) made notable contributions, albeit in smaller proportions. The **rest of the world**, with **3.36%**, played a marginal role, demonstrating a low dependence on non-European imports.

These data highlight a clear concentration of imports on European markets, with a strong dependence on Germany and Italy, while demonstrating a limited openness to world trade for this type of product.

Origins of Spanish imports of cured ham etc...

Spain, 2023, %



Source : [UN comtrade](#)

Market overview

1.5 The best hams of 2024

The **two best hams of 2024** were recently crowned in the **Prix Alimentos de España** awards. In the **jamón serrano** category (or other recognized quality figures), the **prize** went to "**Jamones Perfecto**" de la **Denominación de Origen Protegida (DOP) Jamón de Teruel**. This ham was praised for its **homogeneous, balanced mass**, with a cut showing **intense, brilliant red magro** and **uniform marbling**. Its **pinkish-white grace** and **characteristic smell** of cured and aged ham were also highlighted, underlining its **balanced taste**.

In the **jamón ibérico de bellota** category, the **award** went to "**Juan Manuel Gran Selección 2020**" from the **Guijuelo DOP**. This ham was rewarded for its **elongated piece with fine caña, homogeneous mass** and **intense cherry-red magro** with uniform marbling. The **brilliant pinkish-white grace** and **smell of aged jamón ibérico** also impressed the jury, who particularly appreciated its **slightly salty, mild taste** with **intense notes of aging**.

The two winners were chosen from **60 samples, 25 in the serrano category** and **35 in the ibérico category**. This distinction confirms the excellence and quality of the hams produced in these regions, further boosting their international renown.

Source : [Cárnica](#)

Demand analysis

2.1 Household consumption

In Spain, ham-related statistics also include other products under the processed meat nomenclature. In order to study the particularities of ham consumption, we will base ourselves on the latter.

The processed meat market :

In Spain in 2023, the value breakdown of the processed meat market highlights the predominance of **processed meat leftovers** and **classic cured hams and shoulders**, each accounting for **18.5%** of the total value. These products play a central role in Spanish consumption, not least thanks to their versatility and cultural appeal. **Cured meats**, at **16.3%**, and **cooked hams and shoulders**, at **10.7%**, also confirm their importance in consumer preferences.

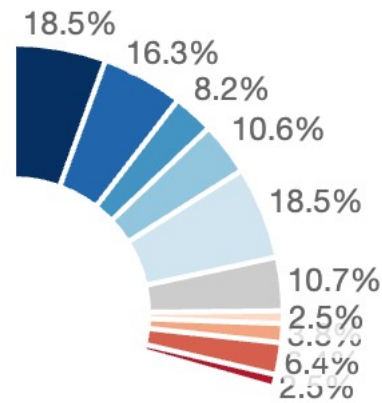
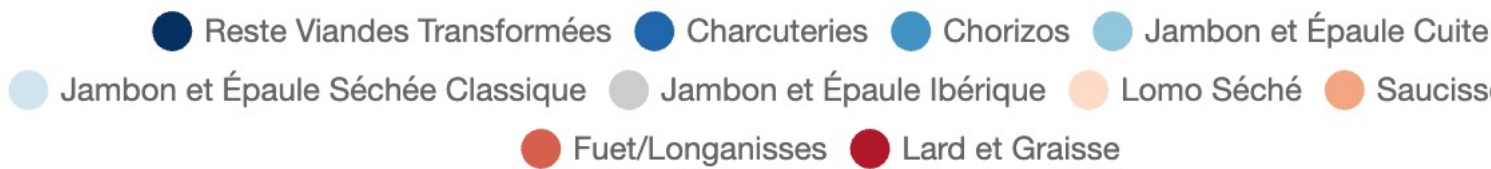
Top-of-the-range **Iberian hams and shoulders** account for **10.6%**, underlining their status as a refined but less common choice. **Chorizos**, another emblematic specialty, occupy **8.2%**, while **dried lomos**, at **6.4%**, round out the range of popular specialties.

Products with a smaller contribution, such as **fuets/longanisses(3.8%)**, **sausage/salami(2.5%)** and **bacon and fat(2.5%)**, show their more niche or specific nature in the consumer basket.

This breakdown reflects the high diversity of the market, with a mix of everyday products and local specialties, in response to the varied tastes and eating habits of Spaniards.

Value breakdown of the processed meat market

Spain, 2023, % of total



Source : [MAPA](#)

In terms of volume, the breakdown of the various ham segments within the Spanish processed meat market in 2023 reveals trends that complement those observed in terms of value. **Other processed meats** largely dominate the market in volume terms, accounting for **28.0%**, followed by **cured meats**, which total **20.5%**. These two segments confirm their preponderance in consumer habits, with a significant presence in daily meals.

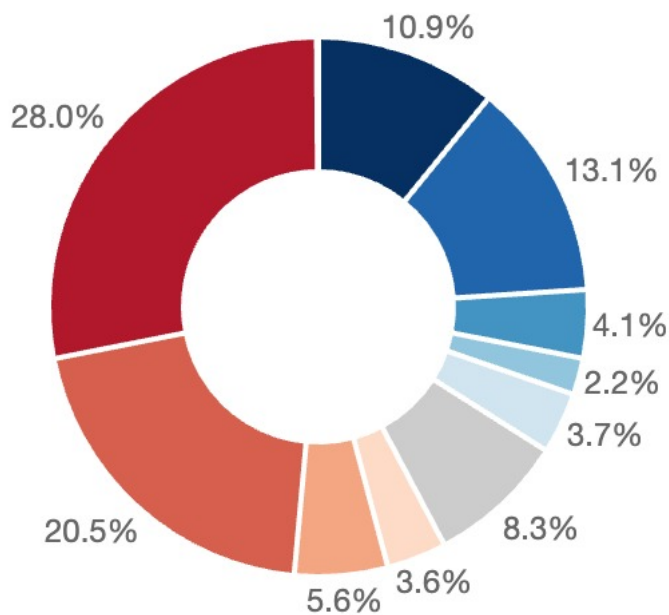
Among products specifically related to ham, **normal dry-cured hams and shoulders** stand out with **13.1%**, a figure that reflects their importance as a mainstream product. **Cooked hams and shoulders** contribute **10.9%**, reflecting their popularity as a convenient and affordable consumption option. By contrast, the more exclusive **Iberian hams and shoulders** account for a more modest **4.1%**, confirming their premium status.

Other segments, such as **chorizo**(8.3%), **fuet and longanizas**(5.6%), and **dried lomo**(2.2%), maintain a significant presence, in line with their roots in Spanish culinary traditions. **Sausages/salamis**(3.6%) and **lard**(3.7%) complete this breakdown, but in more modest volumes.

Volume breakdown of ham segments within the Spanish processed meat market

Spain, 2023, % of total

- Jambon et épaule cuits
- Jambon et épaule secs normaux
- Jambon et épaule ibérique
- Lomo séché N+IB
- Lard et saindoux
- Chorizos
- Saucisson/Salami
- Fuet/Longan
- Charcuteries
- Autres viandes transformées



Source: [MAPA](#)

In terms of consumption per head of ham in Spain, between 2022 and 2023, subtle variations were observed according to ham type. Consumption of **cooked hams and shoulders** fell slightly, from **1.15 kg/head** in 2022 to **1.13 kg/head** in 2023, reflecting a slight contraction in this segment, possibly due to a reduction in the number of hams consumed.contraction in this segment, possibly due to market saturation or a shift in preferences towards other categories.

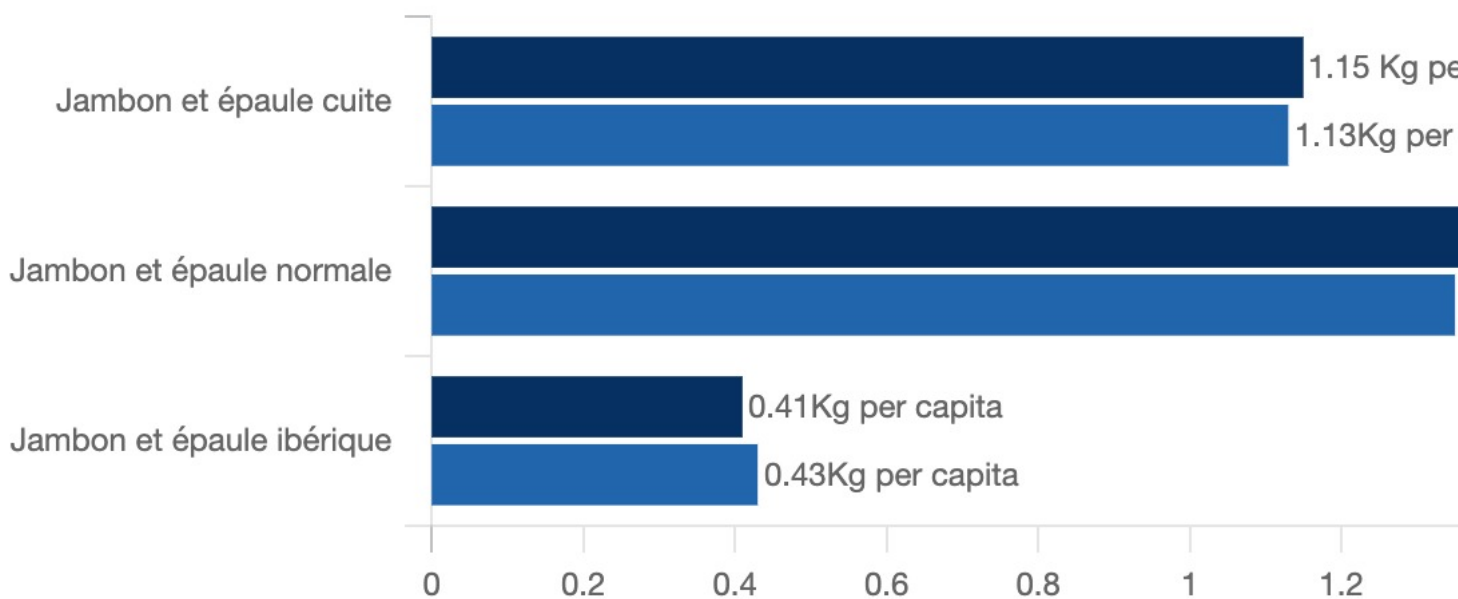
Similarly, consumption of **normal dry-cured ham and shoulders** has fallen from **1.42 kg/head** in 2022 to **1.35 kg/head** in 2023(-4.9%). This decline could be explained by an increased search for premium products or a diversification of eating habits.

By contrast, consumption of **Iberian ham and shoulders**, a symbol of quality and prestige, has risen moderately, from **0.41 kg/head** in 2022 to **0.43 kg/head** in 2023(+4.9%). This increase confirms consumers' growing attraction to top-of-the-range products, despite their generally higher cost.

Domestic consumption per head of ham

Spain, 2022-2023, kg/head

- 2022
- 2023



Processed meat consumption in Spain in 2023 varied significantly according to household composition, highlighting distinct eating behaviors according to family structures and lifestyles. **Pensioners**, who represented **24.7%** of the population, accounted for the largest share of the volume distributed, at **21.6%**, and a high average consumption of **13.5 kg per capita**, reflecting their central role in the processed meat market.

Middle-aged couples with children, although representing **14.2%** of the population, made a significant contribution to the volume distributed, with **19.8%**, thanks to high family consumption. Their per capita consumption remained moderate, however, at **9.1 kg**, due to the generally larger size of these households.

Adult couples without children and **young couples without children** showed different patterns of consumption. The former, representing **12.2%** of the population, consumed **13.2 kg per capita**, well above the national average, while young childless couples, with a smaller population (**7.5%**), consumed a more modest **8.9 kg per capita**.

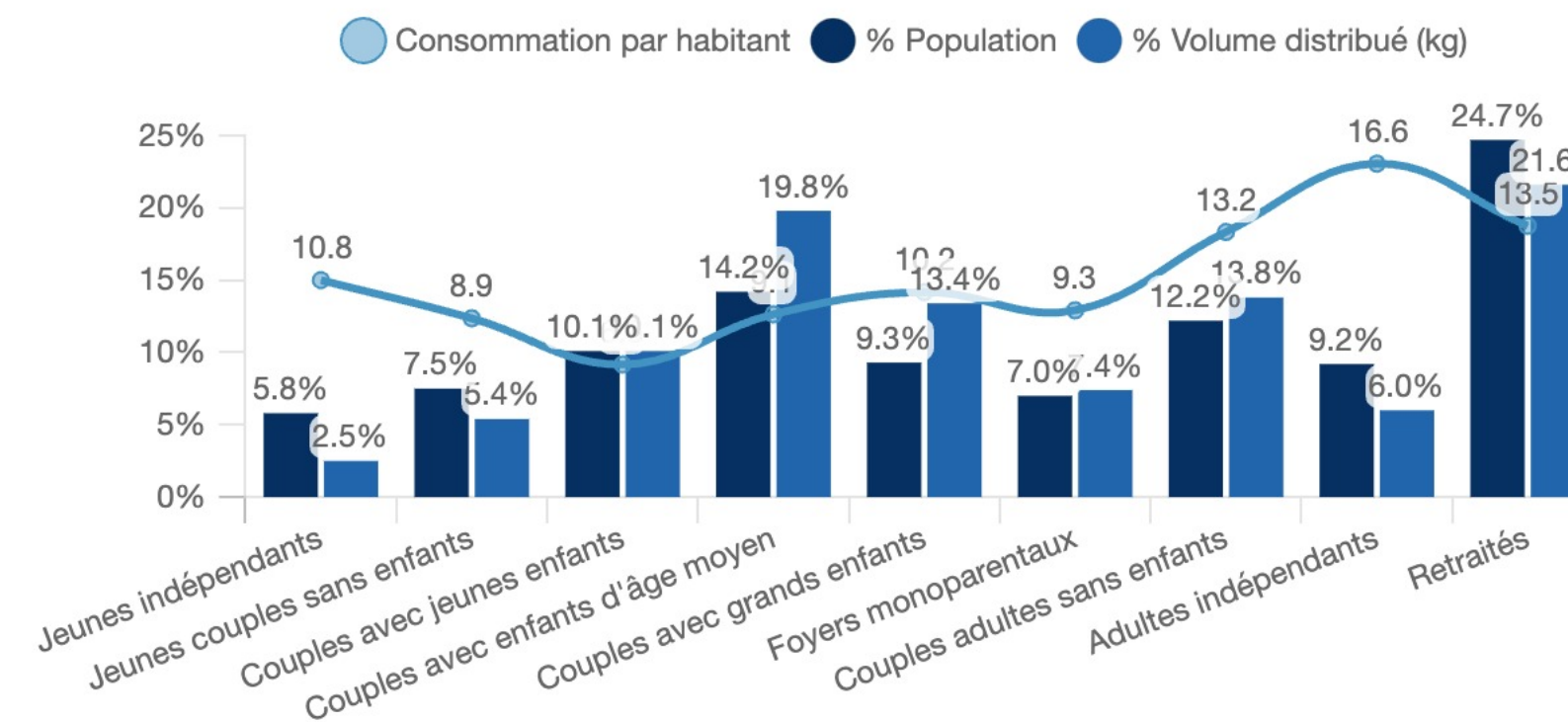
Young self-employed people and **self-employed** adults, although together making up a sizeable share of the population (**5.8%** and **9.2%** respectively), contributed little to the overall volume distributed, at **2.5%** and **6.0%**, despite contrasting per capita consumption: **10.8 kg** for self-employed young people and **16.6 kg**, the highest, for self-employed adults.

Finally, **couples with grown-up children** (**9.3%** of the population) and **single-parent households** (**7.0%**) were at intermediate levels. The former consumed **10.2 kg per capita**, while the latter, with a share of volume slightly higher than their demographic weight (**7.4%** of volume for **7.0%** of population), posted an average consumption of **9.3 kg**.

These data revealed that households with a classic family structure generally consumed more in volume terms, while independent adults and pensioners were distinguished by high per capita consumption, reflecting more individualized or quality-oriented eating habits.

Processed meat consumption by household situation

Spain, 2023, %, kg/head



Source: MAPA

Consumption of processed meat in Spain in 2023 also varied according to social category, revealing marked differences between socio-economic levels. The **high and upper-middle social categories**, representing **16.3%** of the population, contributed **18.6%** of the total volume distributed, with an average per capita consumption of **12.5 kg**, the highest among all categories. This relative over-consumption reflected greater access to quality products and a propensity to spend more on meals including processed meats.

The **middle social categories**, which made up **30.7%** of the population, showed a proportional contribution to the volume distributed (**32.9%**) and an average consumption of **10.5 kg per inhabitant**. This shows that this social category, which is in the majority, has a consumption behavior in line with its demographic weight, reflecting a preference for affordable, everyday products.

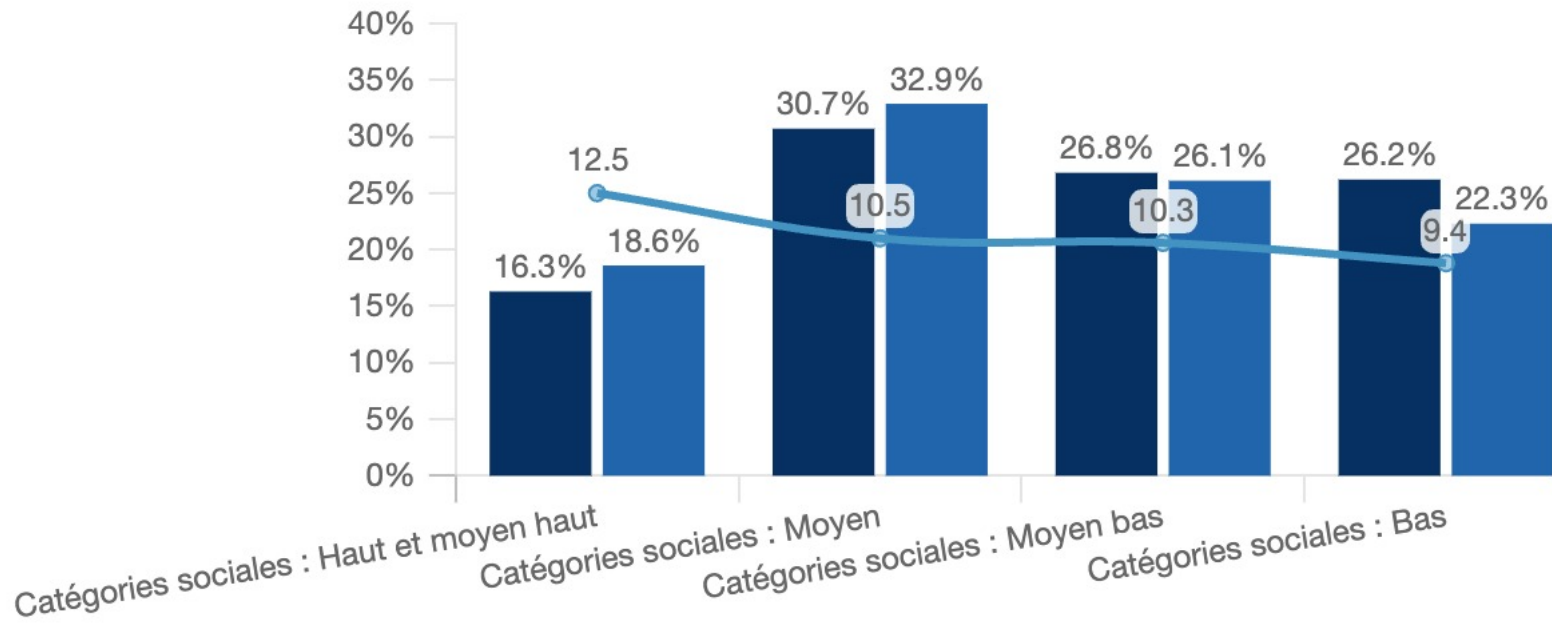
On the other hand, the **lower-middle social categories**, with **26.8%** of the population, slightly under-contributed to the total volume distributed (**26.1%**), with a per capita consumption of **10.3 kg**, slightly lower than that of the middle categories. The **lower social categories**, representing **26.2%** of the population, had the lowest share of the volume distributed (**22.3%**) and a per capita consumption of **9.4 kg**, illustrating more restricted access to this type of product.

These data show that, although the highest social categories consume more per capita, the middle and lower categories remain key market segments due to their significant demographic weight. This underlines the importance of offering a diversified range of products, adapted to the budgets and preferences of each social category.

Processed meat consumption by income level

Spain, 2023, %, kg/head

● Consommation par habitant ● % Population ● % Volume distribué (kg)



Source : MAPA

Finally, when analyzing processed meat consumption by age, generational differences in Spain in 2023 are particularly marked. Those **aged 65 and over**, representing **28.8%** of the population, recorded the highest per capita consumption, reaching **12.9 kg**, while contributing **26.3%** of the total volume distributed. This generation, strongly attached to traditional products, remains a key pillar of the processed meat market.

The **50-64 age** group, although constituting a slightly higher proportion of the population (**29.5%**), made the greatest contribution to the volume distributed, with **34.3%**, and a high average per capita consumption of **11.6 kg**. Their predominant role is explained by their purchasing power and entrenched eating habits.

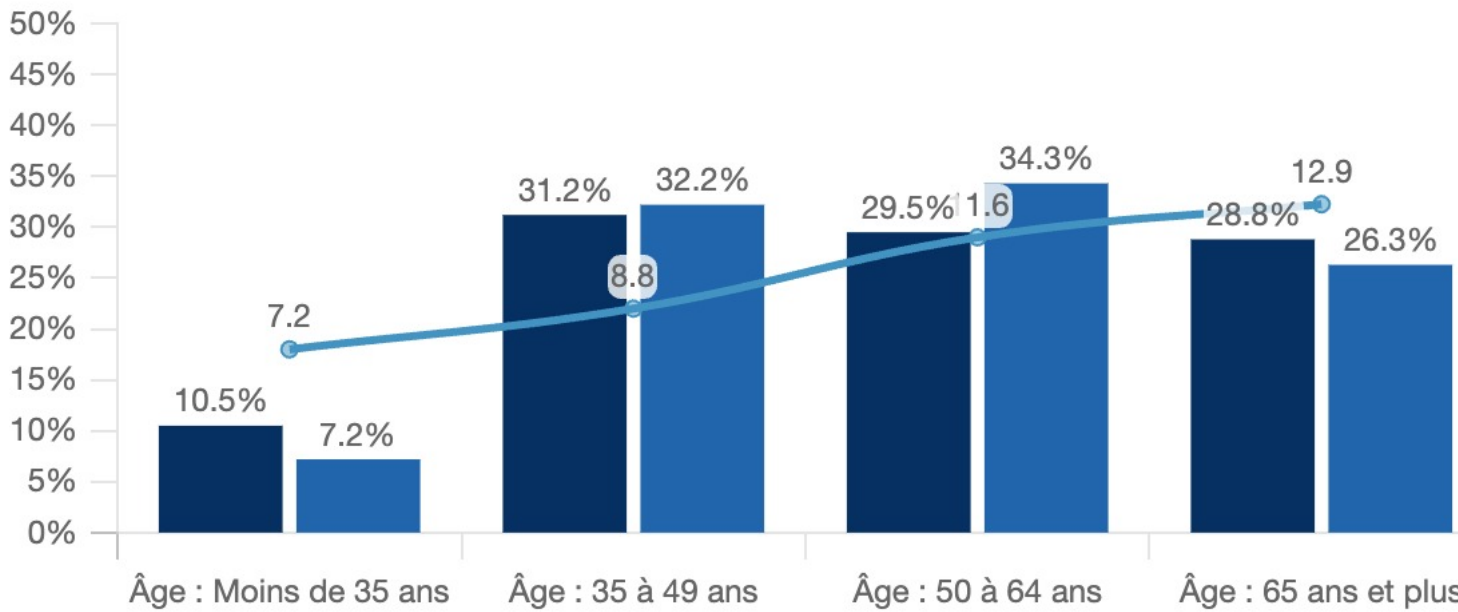
The **35-49 age** group, with **31.2%** of the population, was also a major consumer, accounting for **32.2%** of the total volume distributed, with an average per capita consumption of **8.8 kg**. This category, in the active phase of life, is characterized by food choices often influenced by family and professional needs.

By contrast, the **under-35s**, who represent **10.5%** of the population, made a modest contribution to total consumption, with **7.2%** of the volume distributed and per capita consumption limited to **7.2 kg**. This low contribution reflects different eating habits, possibly influenced by preferences for other types of product, tighter budgets, or increased attention to alternative food trends.

Processed meat consumption by age group

Spain, 2023, %, kg/head

● Consommation par habitant ● % Population ● % Volume distribué (kg)



source : MAPA

Geographical analysis:

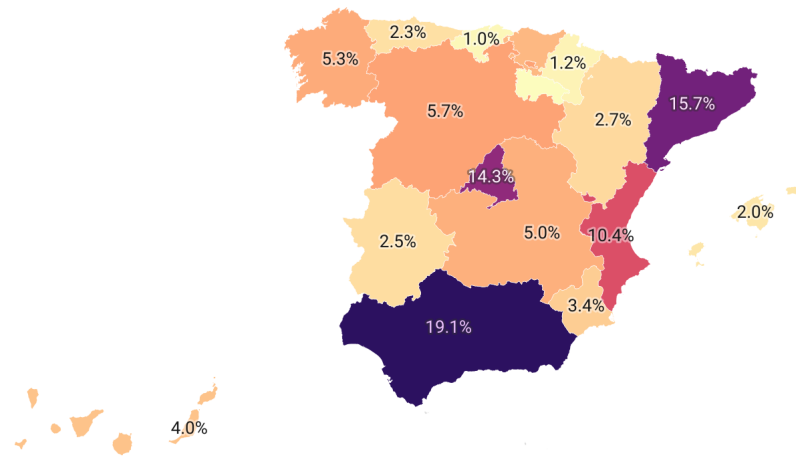
In 2023, the distribution of domestic processed meat consumption in Spain varied considerably between the Autonomous Communities (CCAA). **Andalusia** stood out as the region with the highest consumption, accounting for **19.1%** of total consumption, followed by **Catalonia**(15.7%) and the **Community of Madrid**(14.3%). These three regions, with their large populations and strong culinary traditions, dominated the market.

By contrast, the regions with the lowest consumption were **La Rioja**, with just **0.7%**, **Cantabria**(1.0%) and **Navarre**(1.2%). These low shares can be explained by a smaller population or less dependence on processed meat in local eating habits.

Intermediate regions included the **Comunidad Valenciana**(10.4%), **Castilla y León**(5.7%) and **Galicia**(5.3%), where consumption remained significant. Other areas, such as the **Canary Islands**(4.0%) and the **Basque Country**(4.6%), had more modest shares, but retained a significant place in the national market.

Répartition de la consommation domestique de viande transformée

Espagne, 2023, %



Created with Datawrapper

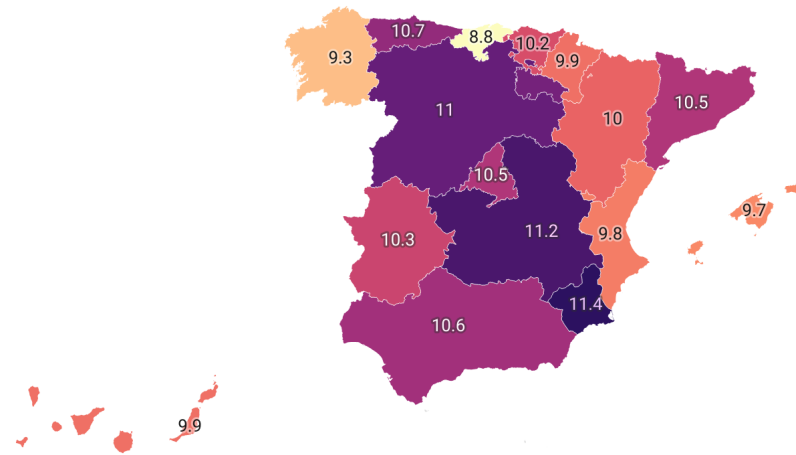
However, this distribution of volume is mainly explained by the uneven distribution of Spain's population. When analyzing **per capita consumption**, the results show relative uniformity, irrespective of region.

Domestic consumption per capita hovers around **10 kg/year** in the majority of regions. For example, areas such as the **Murcia Region**(11.4 kg), **Castilla-La Mancha**(11.2 kg) and **Castilla y León**(11.0 kg) show slightly above-average levels, but with no significant differences from regions such as **Catalonia**(10.5 kg) or **Andalusia**(10.6 kg). On the other hand, some regions such as **Cantabria**(8.8 kg) and **Galicia**(9.3 kg) are slightly below, although the differences remain modest.

These data underline that, despite apparent disparities in total consumption volumes linked to population density, per capita processed meat consumption habits remain similar across the country. This indicates a relatively homogeneous market, which facilitates the implementation of national strategies by producers and distributors.

Consommation domestique par tête de viande transformée

Espagne, 2023, kg/tête



Source: MAPA · Created with Datawrapper

Demand analysis

2.2 Extra-domestic consumption

Ham market segmentation:

In Spain in 2023, the processed meat market within the HORECA sector (Hotels, Restaurants and Cafés) was largely dominated by categories other than cured ham, lomo, chorizo and products such as foie gras or pâtés. The "rest of processed meat" category accounted for 72.8% of market share, reflecting the wide variety of products used in this sector.

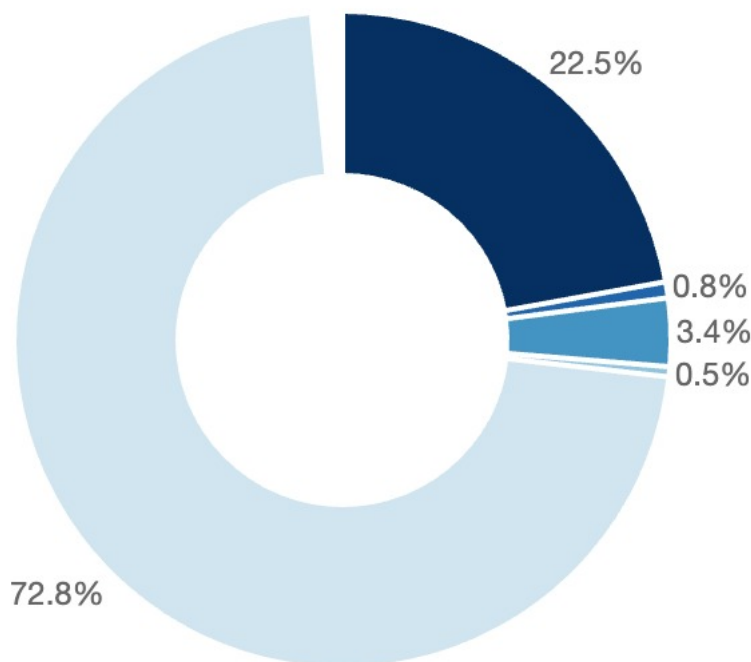
However, **cured ham** emerged as the leading product among the individual segments, with a significant share of 22.5%, testifying to its essential role in Spanish gastronomy, particularly on restaurant and hotel menus.

Chorizo, with a share of 3.4%, occupies a lesser place but remains a key product due to its use in a variety of traditional dishes. By contrast, the **lomo**(0.8%) and **pâtés and foie gras**(0.5%) segments have smaller shares, underlining their more specific and targeted use in the HORECA sector.

These figures reflect a significant concentration on the most versatile and popular products, notably cured ham, while leaving a significant place for other processed meats, adapted to the diverse needs of the professional catering sector.

HORECA processed meat market segmentation

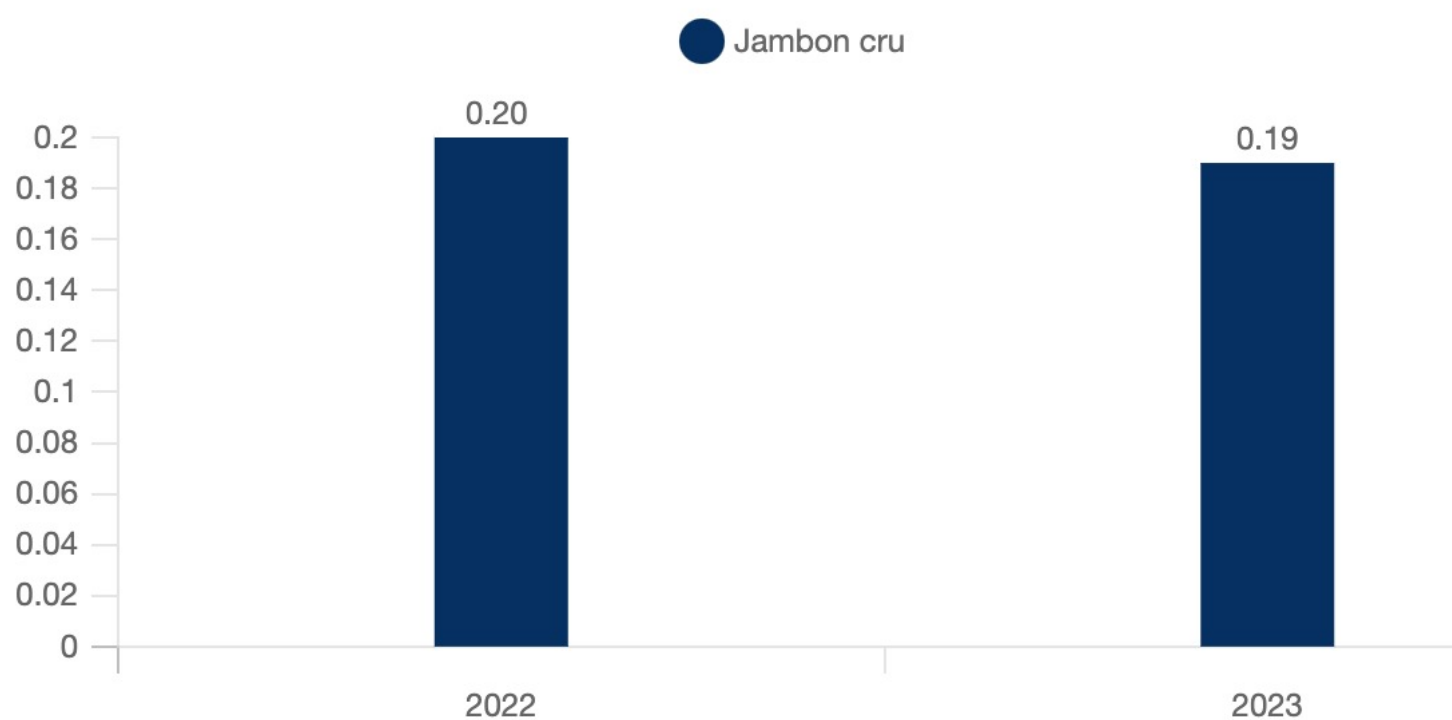
Spain, 2023, % of total



Per capita consumption of **cured ham** outside the home, however, showed a slight decline between 2022 and 2023. In 2022, each person consumed an average of **0.20 kg of cured ham** in HORECA establishments, a quantity that fell to **0.19 kg in 2023**, a decrease of 5%.

Extra-domestic ham consumption per head

Spain, 2022-2023, kg/head



Source: MAPA

Consumer study:

In 2023, consumption of **processed meat**, including cured ham, varied significantly by age group, revealing marked differences in Spaniards' eating habits outside the home.

The **50-59 age** group stood out as the biggest consumers, accounting for **29.0% of total consumption** for just **19.9% of the population**, with an average of **1.22 kg per head**. Their contribution far exceeded their demographic weight, underlining a strong preference for this type of product, probably linked to traditional eating habits and more stable purchasing power.

The **35-49 age** group also played an important role, with **27.4% of consumption** for **28.9% of the population**, consuming an average of **0.79 kg per head**. The **60-75 age** group followed with **22.5% of consumption**, although they represented a slightly higher proportion of the population (**23.1%**), with an average consumption of **0.81 kg**.

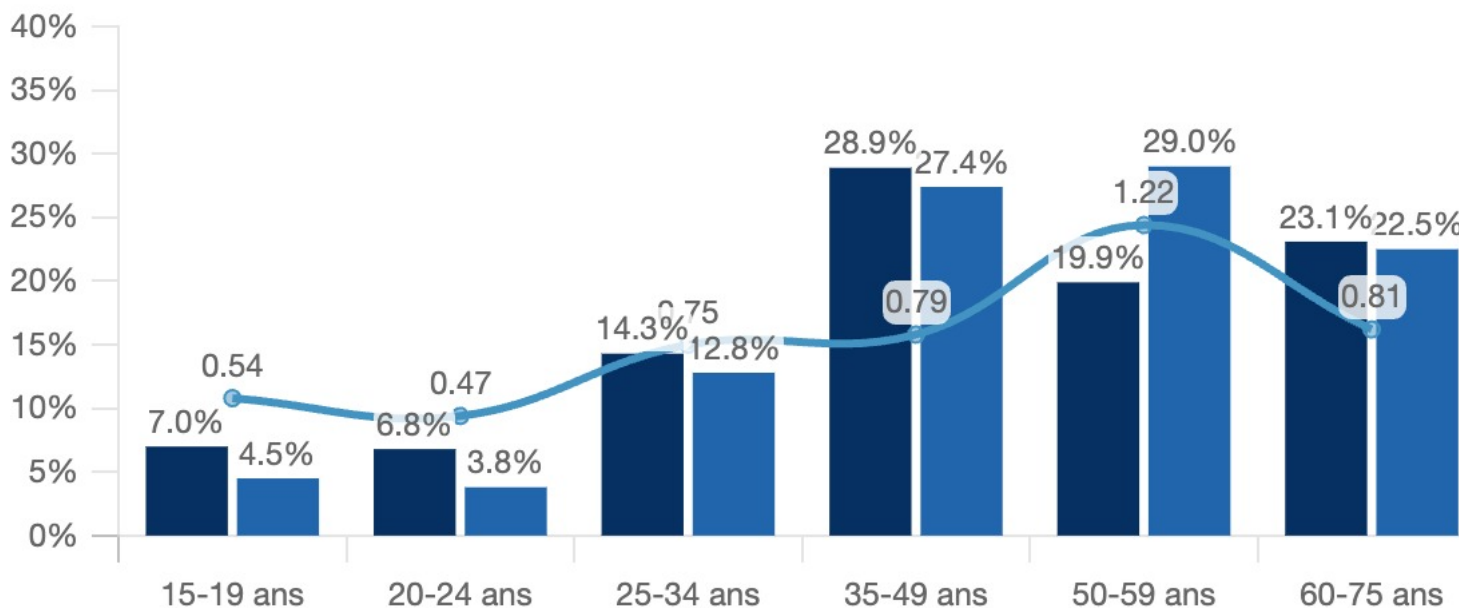
By contrast, the younger generations, notably the **15-19** and **20-24** age groups, showed much lower levels of consumption, accounting for just **4.5%** and **3.8%** of total consumption respectively, despite their significant share of the population (**7.0%** and **6.8%**). Their average per capita consumption remained limited to **0.54 kg** and **0.47 kg**, probably reflecting different eating habits, less access to the HORECA sector or a growing interest in alternatives to processed meat.

These data highlighted a concentration of processed meat consumption, and in particular cured ham, among older generations, while younger generations adopted distinct eating behaviors. This segmentation by age was a key indicator for adjusting the commercial strategies of players in the sector.

Consumption of processed meat outside the home, by age group

Spain, 2023, % of population, % of consumption, kg/head

● Kg/tête ● % population ● % consommation



Source : MAPA

The following graph provides further information on the consumption of **processed meat outside the home** in Spain, as a function of income:

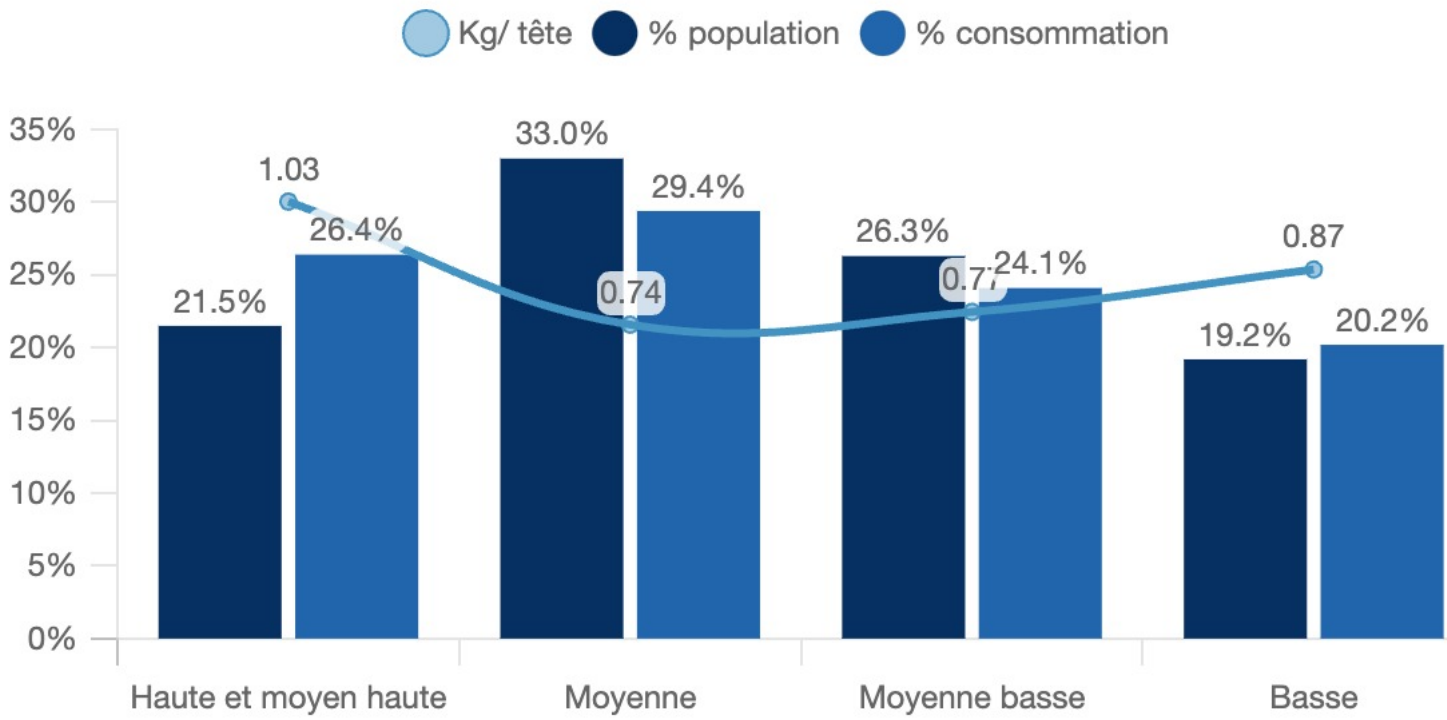
Individuals belonging to the **high and middle-high income** categories proved to be the biggest consumers per head, with an average of **1.03 kg**, accounting for **26.4% of total consumption**, whereas they represented only **21.5% of the population**. This over-representation illustrates a greater financial capacity to frequent HORECA establishments and a preference for quality products, often associated with these incomes.

Middle-income groups contributed **29.4% of total consumption**, slightly below their share of the population (**33.0%**), with an average per capita consumption of **0.74 kg**. Although the majority in demographic terms, their per capita consumption remained lower than that of the more affluent categories, probably due to more limited budgets.

Low- and middle-income households accounted for **24.1%** and **20.2%** of total consumption respectively, in line with their share of the population (**26.3%** and **19.2%**). However, their per capita consumption was slightly higher than that of average incomes, with **0.77 kg** for low-middle incomes and **0.87 kg** for low incomes, which may reflect a less expensive choice of products or a higher proportion of meals taken away from home for practical reasons.

Consumption of processed meat outside the home as a function of income

Spain, 2023, % of population, % of consumption, kg/head

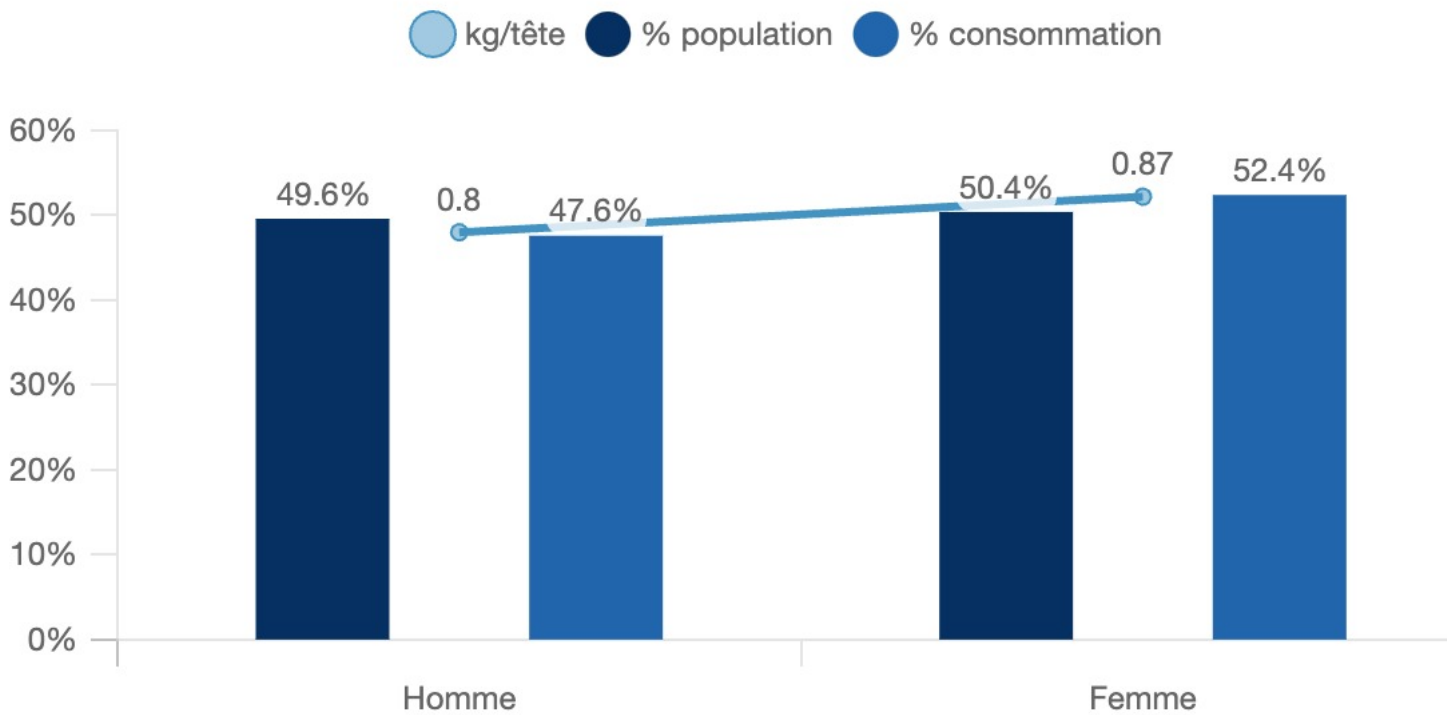


Source : MAPA
 By gender, **women**, representing **50.4% of the population**, contributed **52.4% of total consumption**, with an average per capita consumption of **0.87 kg**. This over-representation suggests a slightly greater preference for meals away from home, or a more frequent choice of processed meat products in this context.

In contrast, **men**, who made up **49.6% of the population**, accounted for **47.6% of total consumption**, with an average per capita consumption of **0.80 kg**. Although slightly lower than that of women, their consumption remains significant, confirming their significant role in this market.

Extra-domestic consumption of processed meat by gender

Spain, 2023, % (in %)



Geographical distribution:

In 2023, extra-domestic consumption of **processed meat** in Spain showed significant regional disparities, reflecting cultural, economic and demographic differences.

Andalusia stood out as the region with the highest share of consumption, accounting for **21.5%** of total consumption, well above its share of the population (**20.5%**). With an average **per capita** consumption of **0.87 kg**, this region illustrates a strong attachment to processed meat, probably influenced by local culinary traditions and a social culture focused on eating out.

Levante and the **Madrid metropolitan** region also posted high shares, with **17.6%** and **14.8%** of consumption respectively, slightly higher than their demographic proportions (**15.6%** and **13.5%**). Per capita consumption was high in these regions, reaching **0.94 kg** in Levante, the highest of all regions, and **0.92 kg** in Madrid, testifying to their economic dynamism and the attractiveness of the HORECA sector.

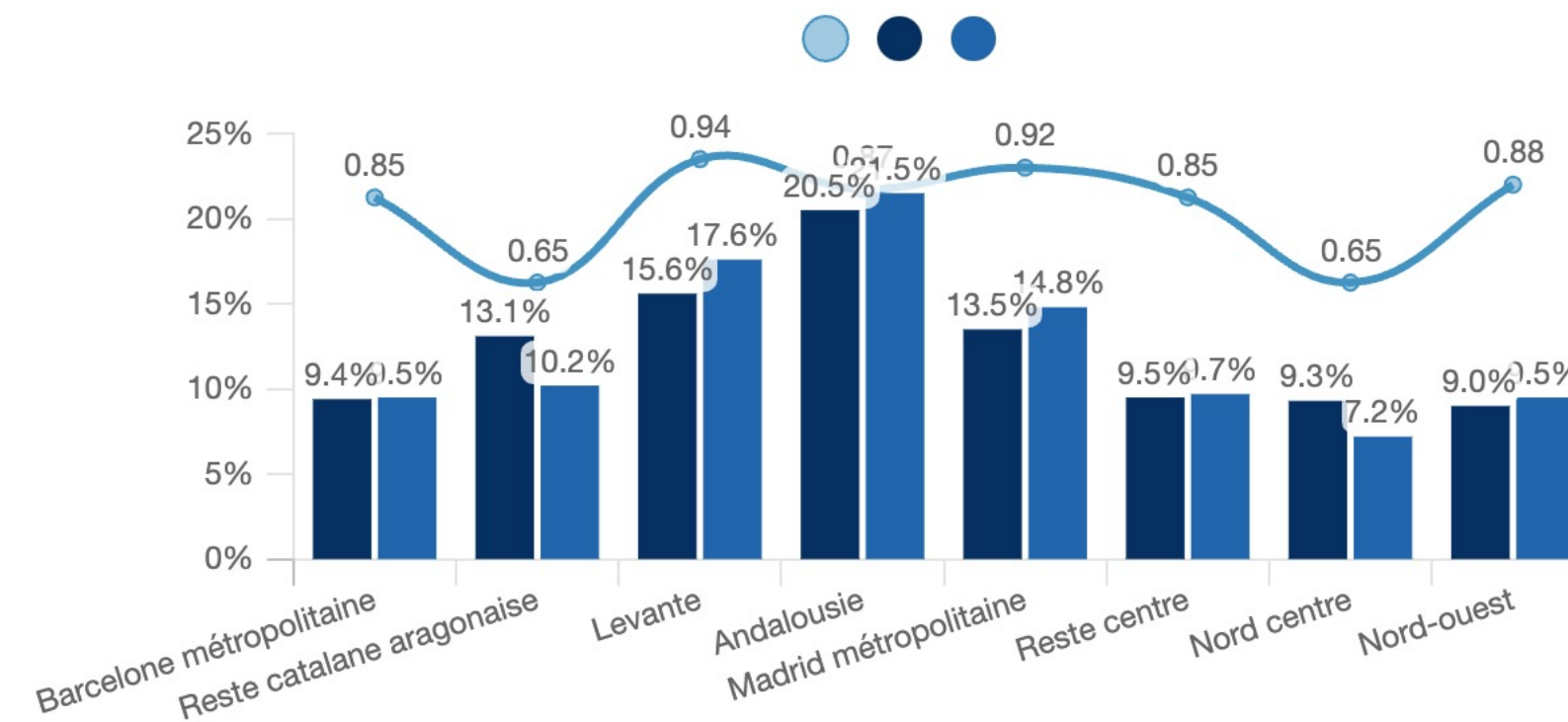
Metropolitan Barcelona, on the other hand, despite its population density (**9.4%**), accounted for only **9.5%** of consumption, with an average of **0.85 kg per head**, slightly below the major consuming regions. Similar trends were observed in the **rest of Catalonia and Aragon** (**13.1% of the population, 10.2% of consumption**) and in **Nord Centre** (**9.3% of the population, 7.2% of consumption**), with lower average consumption, around **0.65 kg per head**.

Finally, the **North-West** and **Rest of Centre** regions are at intermediate levels, representing **9.5%** and **9.7%** of consumption respectively, close to their demographic share, with per capita consumption of **0.88 kg** and **0.85 kg**.

These data reveal that the Levante, Madrid and Andalusia regions are the main drivers of extra-domestic consumption of processed meat, while other areas, such as the North-Central region, show more modest behavior. This underlines the importance for HORECA players of adapting their offer to regional preferences in order to maximize their impact on this diversified market.

Breakdown of extra-domestic processed meat consumption by region

Spain, 2023, % population, % consumption, kg/head



Source: MAPA

In 2023, extra-domestic consumption of **processed meat** in Spain also showed an interesting distribution according to the size of conurbations, reflecting specific dynamics linked to urban and rural lifestyles.

Large conurbations with **populations of 200,000 to 500,000** showed the highest average per capita consumption, reaching **0.94 kg**, reflecting a marked habit of eating out. These cities, which account for **12.7% of the population**, contributed **14.2% of total consumption**, demonstrating the significant dynamism of the HORECA sector in these urban areas.

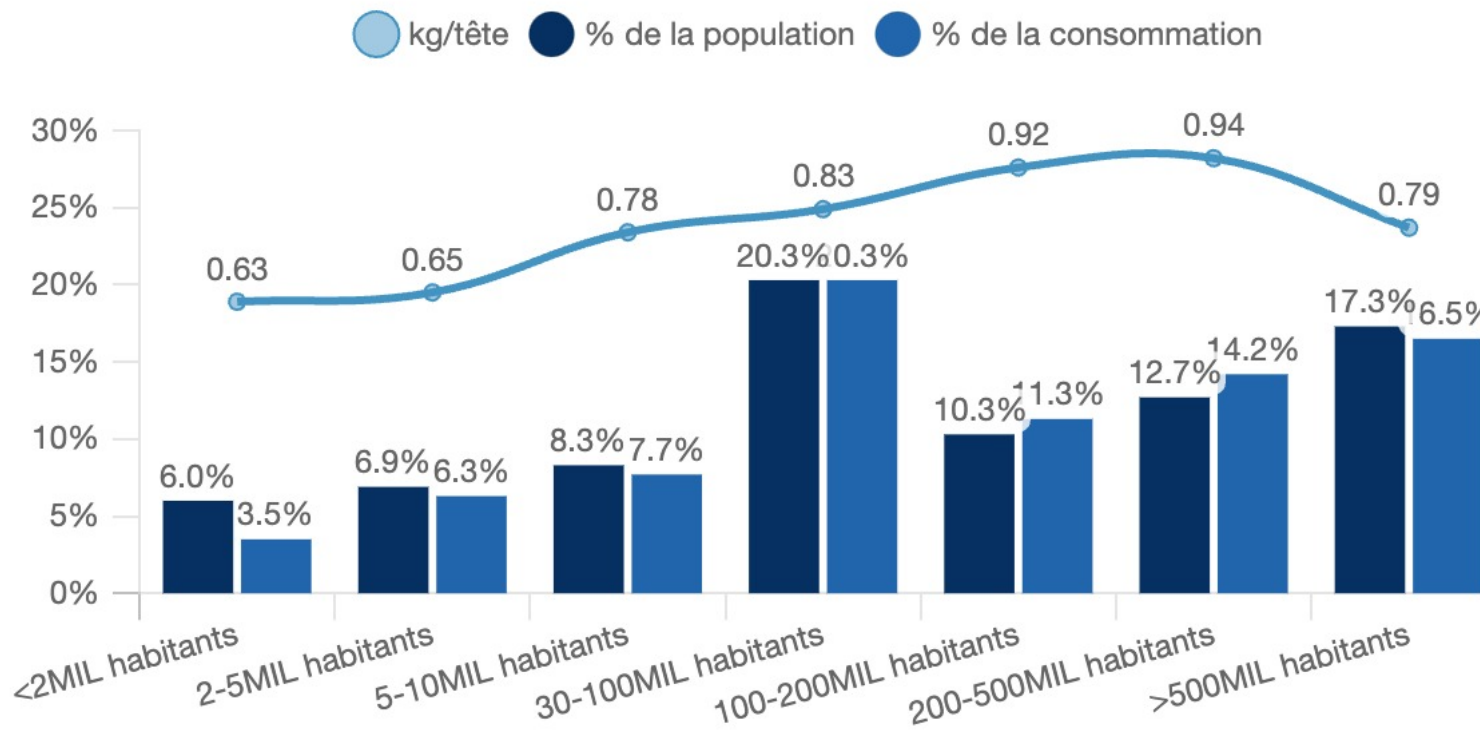
Agglomerations with **100,000 to 200,000 inhabitants** followed with an average per capita consumption of **0.92 kg**, slightly exceeding their demographic share (**10.3% of the population, 11.3% of consumption**). These areas seem to maintain a balance between population density and foodservice attractiveness.

On the other hand, in very large cities of **over 500,000 inhabitants**, although the population share is significant (**17.3%**), average per capita consumption is slightly lower, at **0.79 kg**, and their contribution to total consumption (**16.5%**) is below their demographic weight. This could be explained by more varied access to food alternatives or a diversification of consumption patterns.

Medium-sized towns and cities (**30,000 to 100,000 inhabitants**) account for a significant proportion of the population (**20.3%**) and make an identical contribution to total consumption (**20.3%**), with an average of **0.83 kg per head**, reflecting consumption in line with their demographic weight.

Finally, small towns and villages (**fewer than 10,000 inhabitants**) show lower average consumption per head, at **0.63 kg** for municipalities with fewer than 2,000 inhabitants, and **0.65 kg** for those with 2,000 to 5,000 inhabitants. These areas, representing **6.0%** and **6.9%** of the population respectively, make a modest contribution to total consumption (**3.5%** and **6.3%**). These figures show a lesser reliance on meals away from home, consistent with more rural lifestyles.

These data underline the importance of urban areas, particularly medium-sized towns, in the market for processed meat consumed away from home, while also highlighting more modest consumption habits in smaller towns. Players in the HORECA sector can use this information to fine-tune their strategy according to the density and behavior of local populations.



Source : MAPA

Demand analysis

2.3 Spanish diets

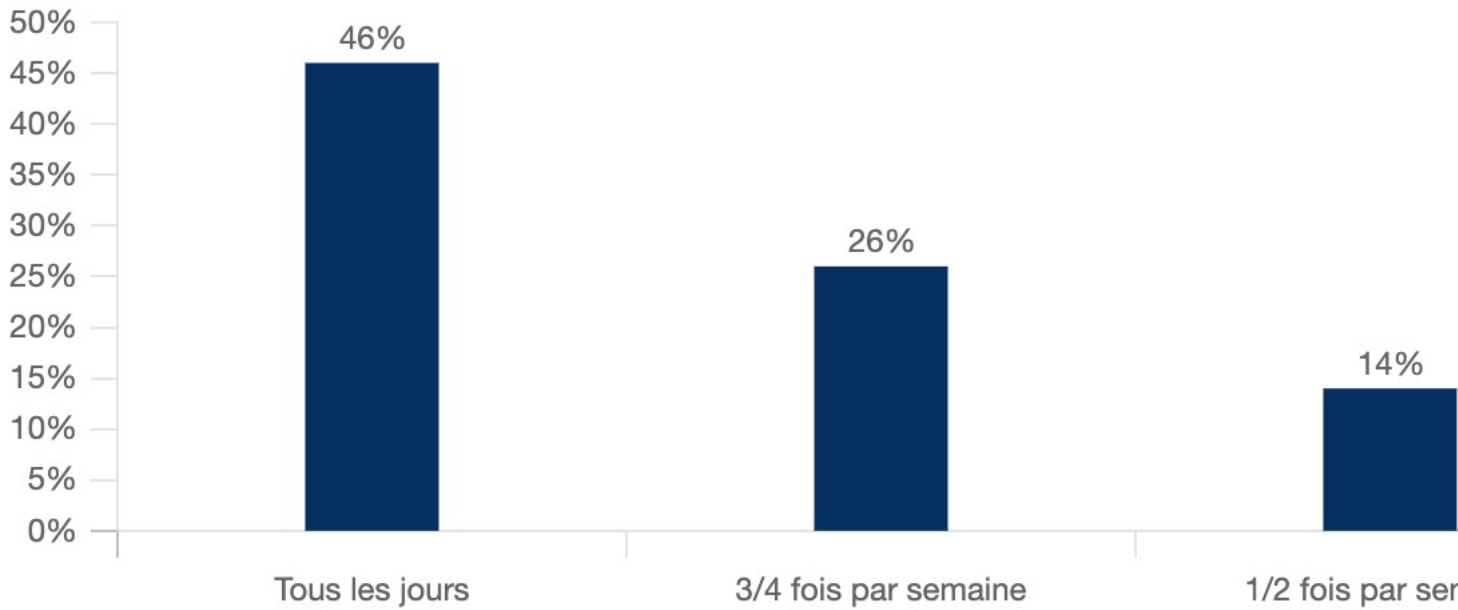
The following section highlights Spanish cooking and eating habits

Cooking habits:

In 2023, the majority of Spaniards cooked frequently at home, with **46%** preparing meals **every day**. Some **26%** cooked **3-4 times a week**, while **14%** did so **1-2 times a week**. These data show that home cooking remains a common practice in Spain, although the frequency varies according to individual habits.

Cooking frequency of Spaniards

Spain, 2023, % of total

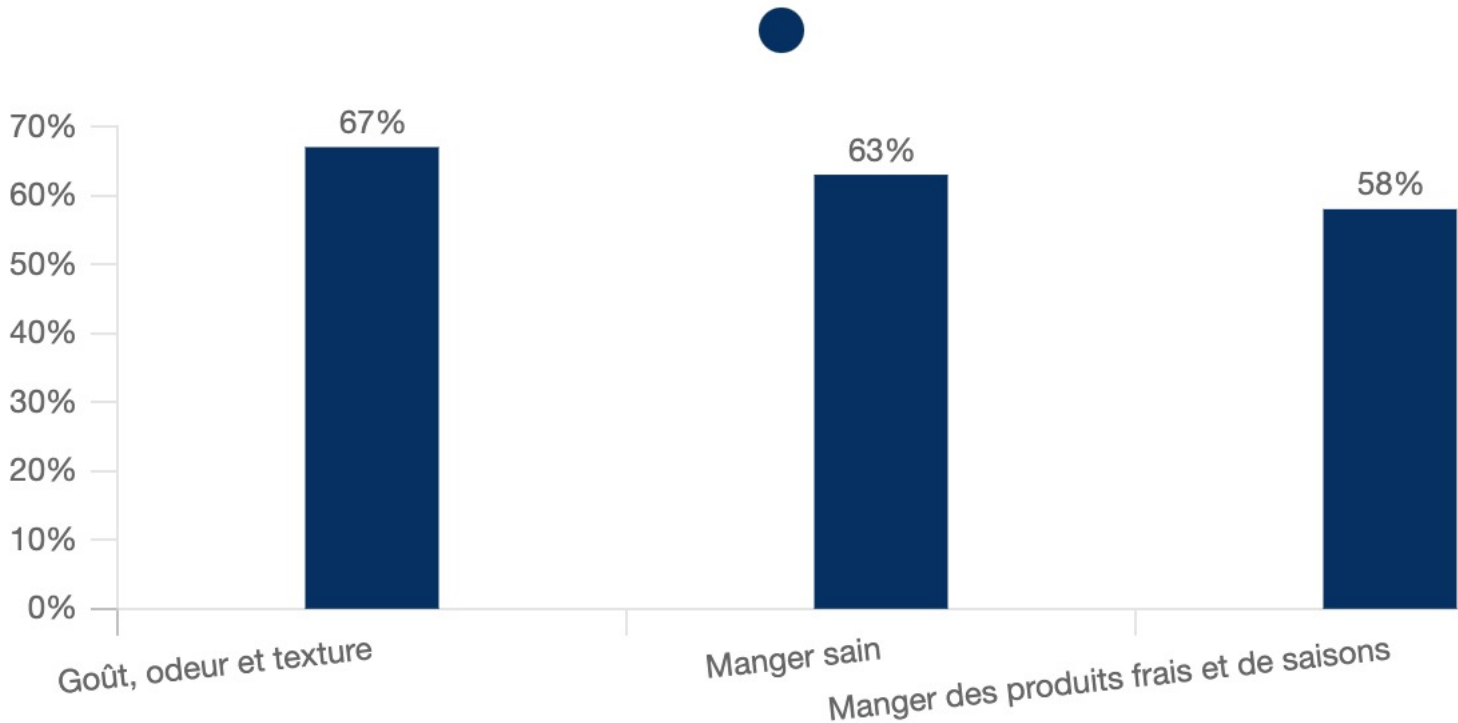


Source: [OkSalud](#)

In 2023, the most decisive criteria for preparing a dish in Spain were mainly focused on **sensory satisfaction**, with 67% of Spaniards giving priority to **taste, smell and texture**. **Health** also figured prominently, with 63% giving priority to **healthy eating**. What's more, 58% of Spaniards were keen to eat **fresh, seasonal produce**, reflecting a growing interest in more sustainable, quality food.

Determining criteria for the preparation of a dish

Spain, 2023, %

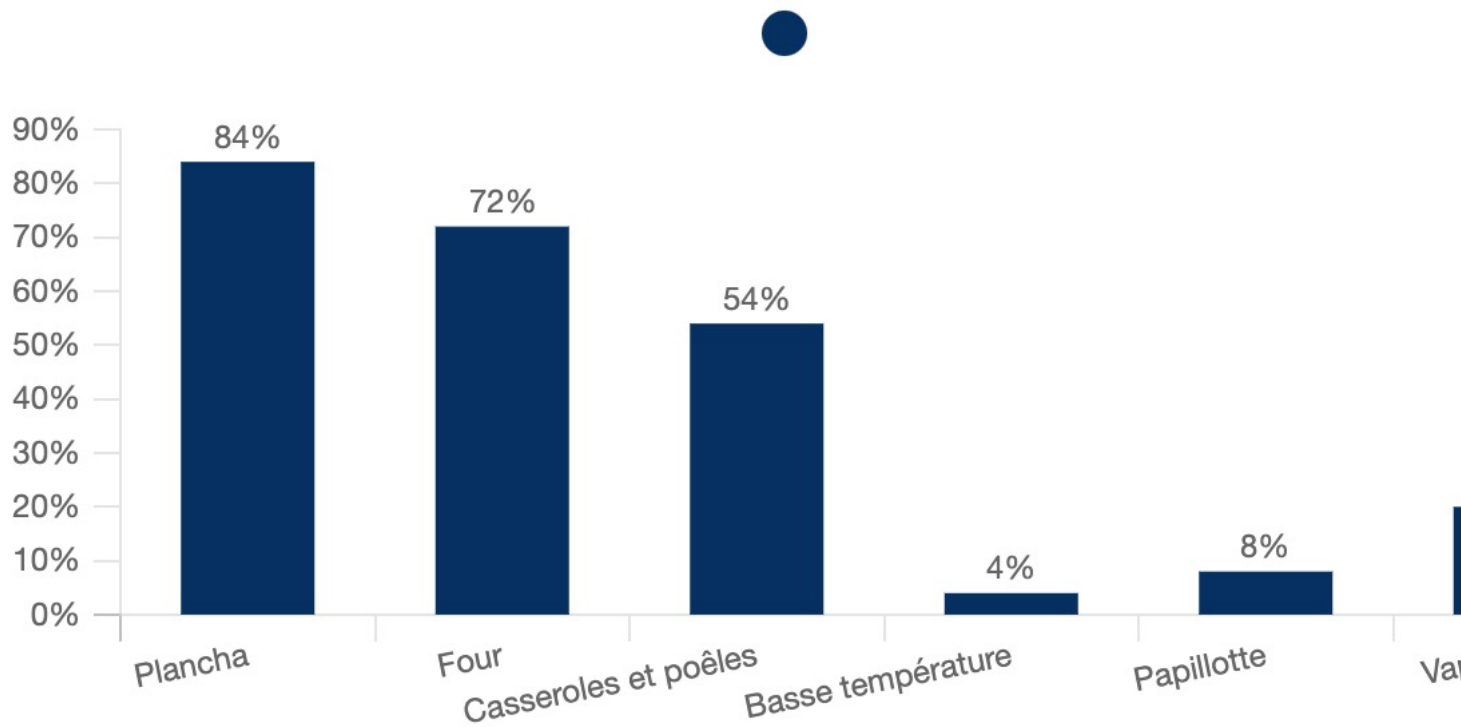


Source: [OkSalud](#)

Show a preference for simple, fast techniques, while leaving room for healthier, less common methods.

Spaniards' preferred cooking techniques

Spain, 2023, % of total



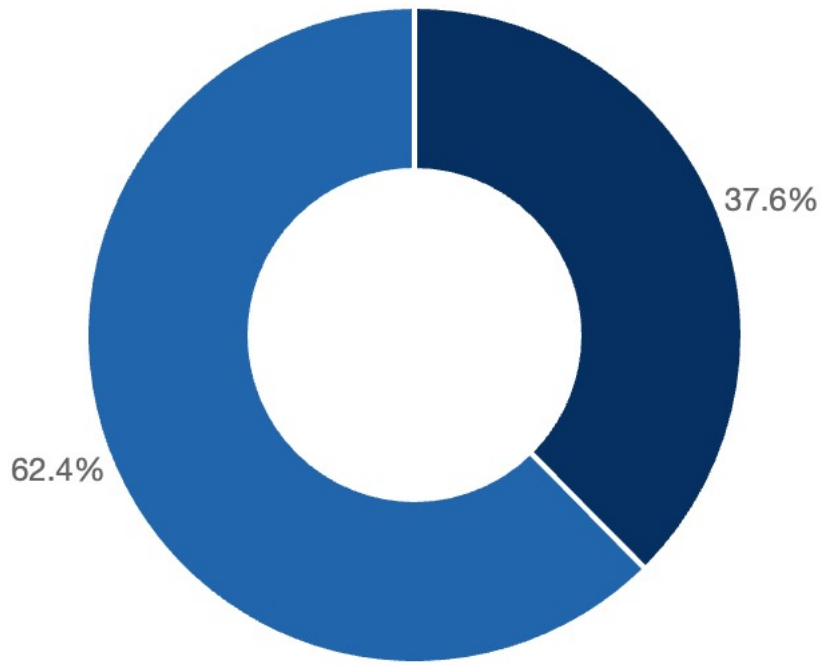
Source: [OkSalud](#)

Healthy eating:
In 2023, fresh food consumption accounts for **37.6%** of total food consumption in Spain, while the remaining **62.4%** is accounted for by other types of food, such as processed, preserved or frozen products. This breakdown shows a preference for non-fresh foods, although fresh products continue to occupy a significant share of overall food consumption in Spain.

Share of fresh food consumption in total food consumption

Spain, 2023, % (in %)

● Frais ● Autres

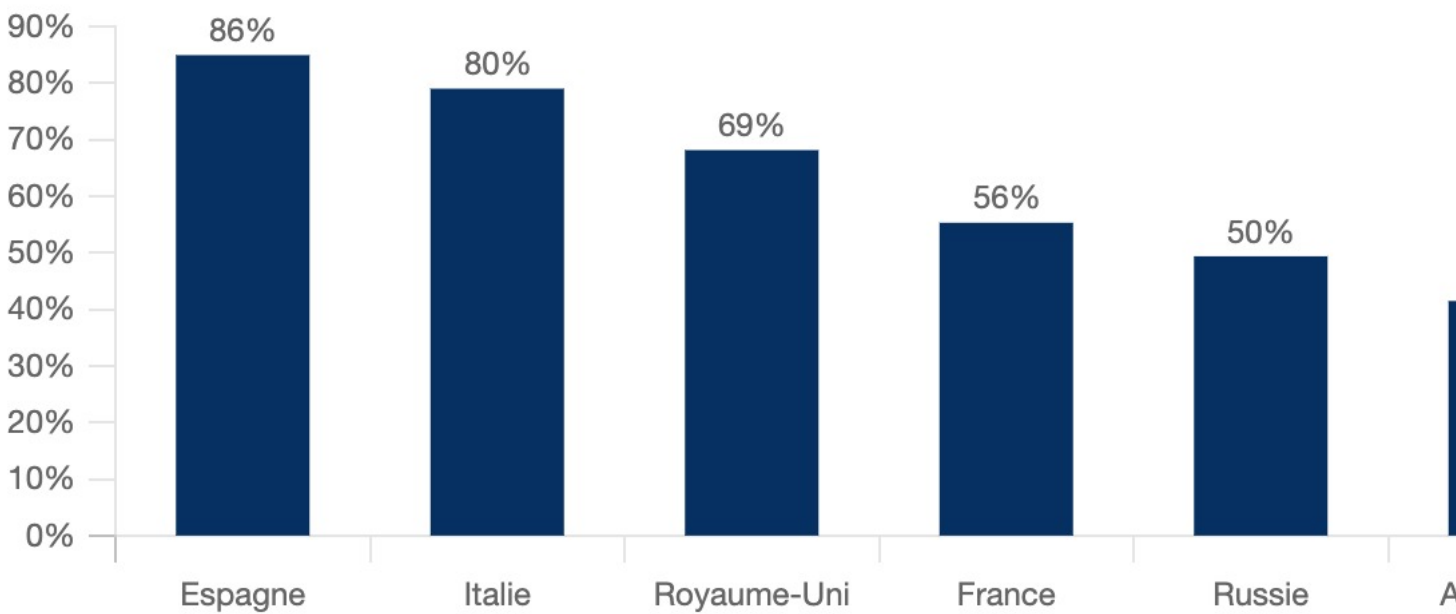


Source: [Informe del consumo alimentario 2023](#)

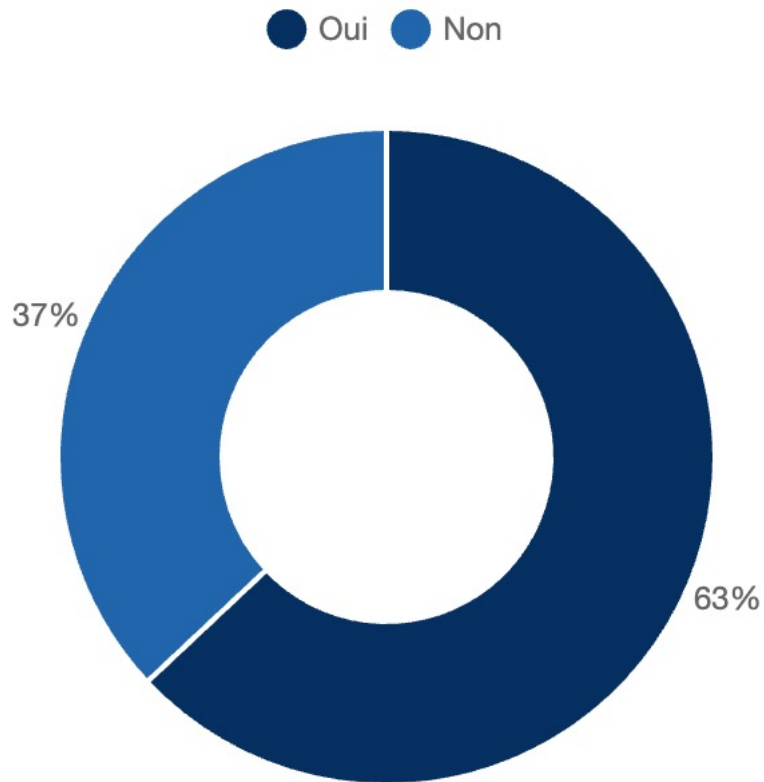
In 2023, the importance of **healthy food** varied considerably across Europe, with higher levels of concern in some countries. In **Spain**, **86%** of the population attached great importance to eating healthily, followed closely by **Italy** with **80%**. In the **UK**, **69%** of the population were concerned, while in **France** it was **56%**. In **Russia**, **50%** of people were concerned about healthy eating, and in **Germany** the proportion was lower, at **42%**. These figures show a significant difference in the importance attached to healthy eating across Europe.

The importance of healthy food in Europe

Europe, 2023, %, %, %, %, %, %, %, %, %, %, %, %



Source : [20minutos](#)



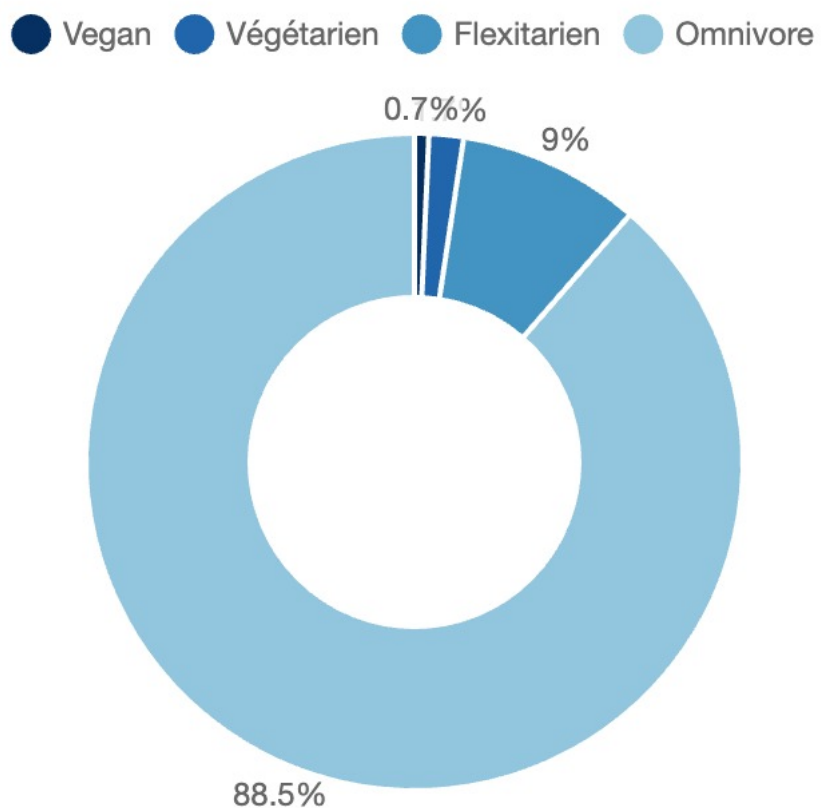
Source : [20Minutos](#)

Diets:

In 2023, the vast majority of Spaniards followed an **omnivorous** diet, representing **88.5%** of the population. **Flexitarians**, who limit their meat consumption without excluding it altogether, made up **9%** of Spaniards. **Vegetarian** diets were followed by **1.7%** of the population, while **vegans**, who exclude all animal products, accounted for just **0.7%**. These figures show that, although plant-based diets are gaining in popularity, the omnivorous diet remains dominant in Spain.

Spanish diets

Spain, 2023, % of total

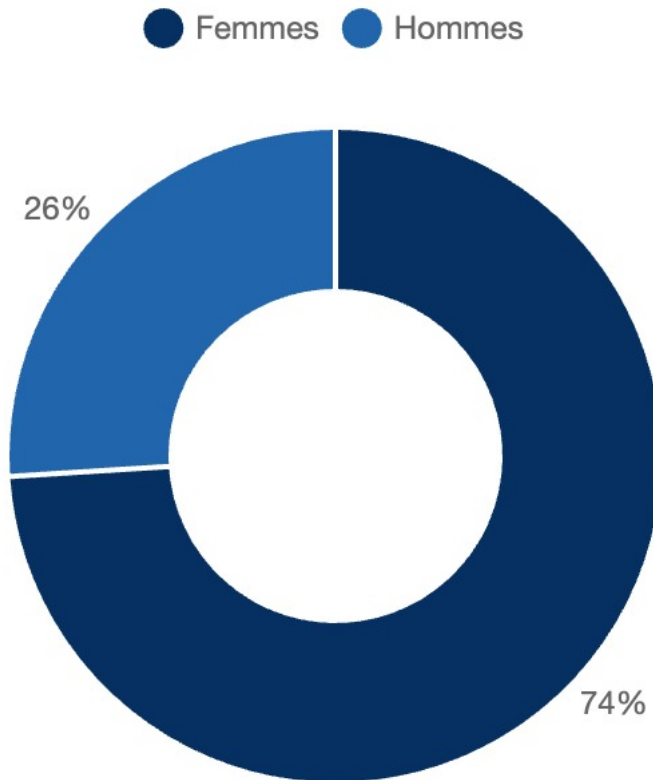


Source: [Union vegetariana](#)

Finally, in 2023, the breakdown of **vegetarians and vegans** in Spain showed a clear majority of **women**, who accounted for **74%** of followers of these diets, against **26%** of **men**.

Gender distribution of vegetarians and vegans

Spain, 2023, % (in %)



Source: [Unión Vegetariana](#)

Demand analysis

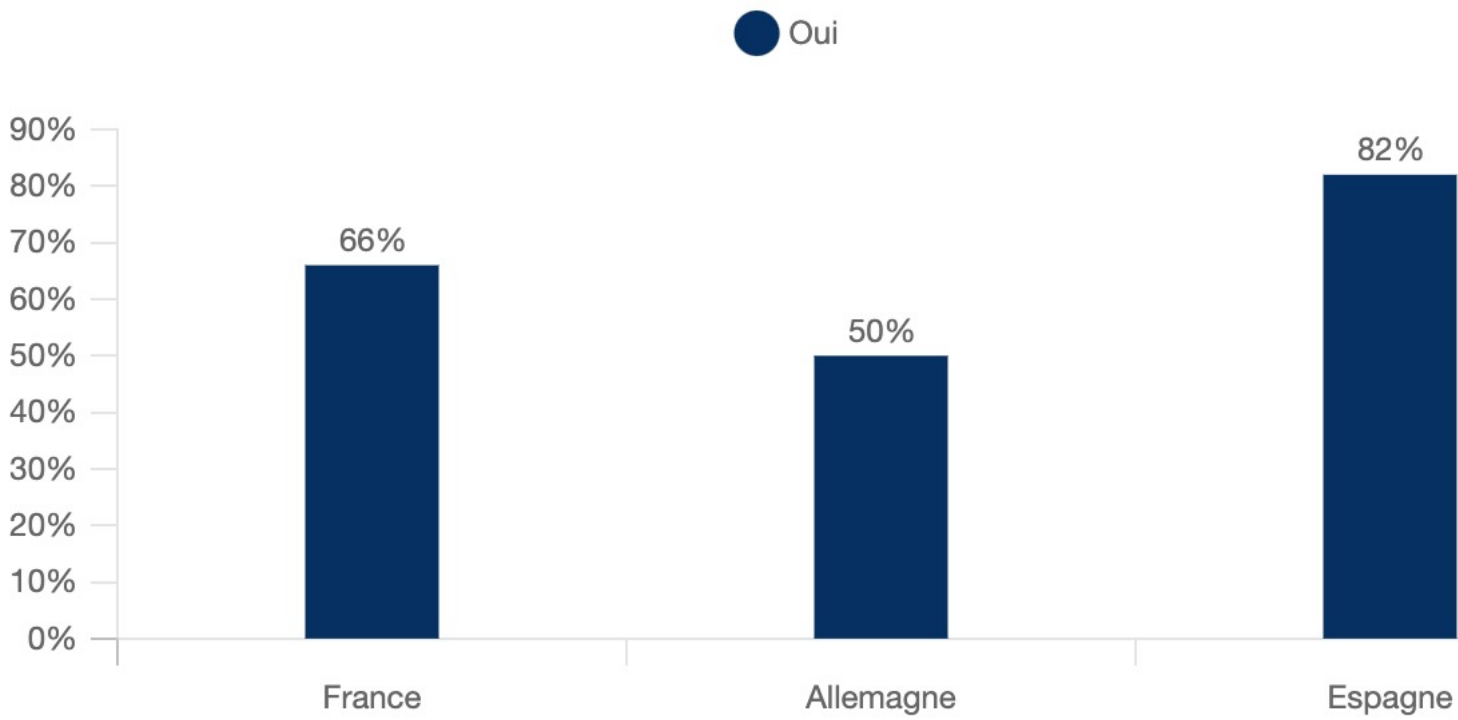
2.4 Iberian ham

What people know about ham

In 2024, a significant majority of the Spanish population (**82%**) considered Iberian ham to be an emblematic element of Spanish culture, confirming its central role in the country's gastronomic heritage. In comparison, **66% of French people** shared this opinion, as did **50% of Germans**. This **shows** that Iberian ham is associated with Spain and its culture.

Do you consider Iberian ham to be emblematic of Spanish culture?

Spain, 2024, %



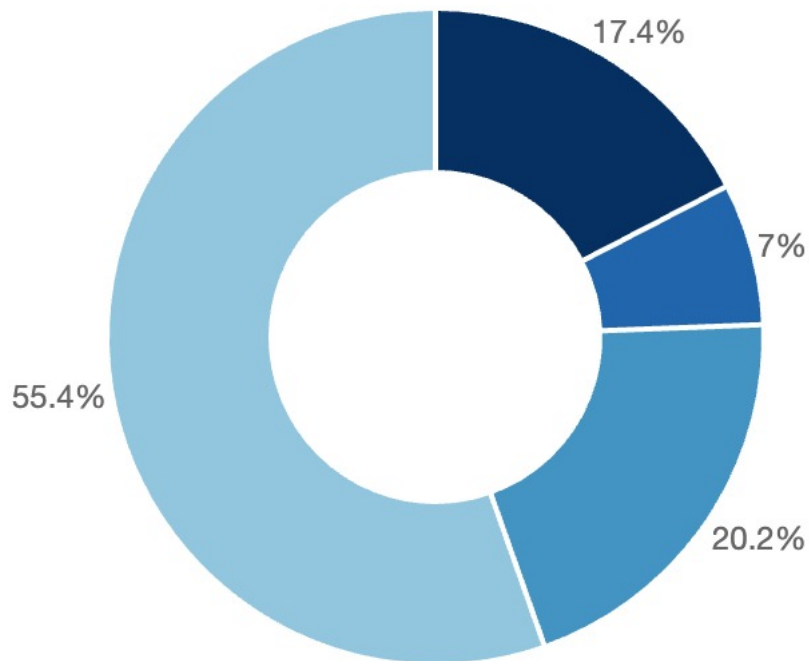
Source: [Cárnica comunicación](#)

In 2024, Spaniards demonstrated a varied level of knowledge about Iberian ham. A relative majority, 55.4%, claimed to know a little about the product, while 20.2% felt they knew enough. A smaller proportion, 7%, considered themselves very knowledgeable, while 17.4% said they knew nothing at all about the subject.

Spaniards' knowledge of Iberian ham

Spain, 2024, % of total

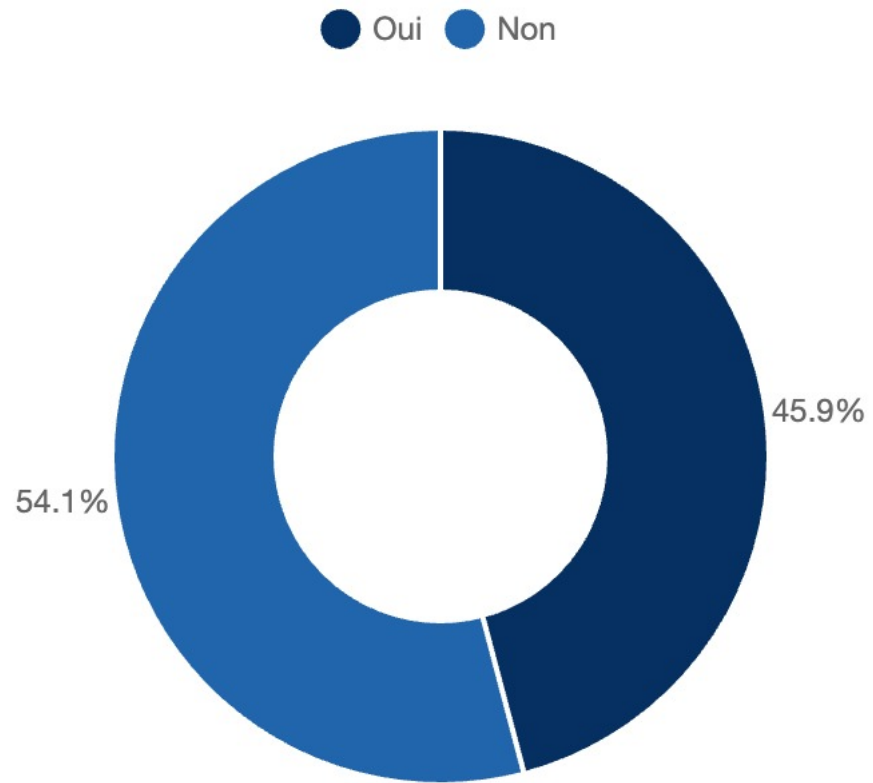
● Ne connais rien
 ● En sait beaucoup
 ● En sait assez
 ● En sait un peu



Source: [Consumidores](#)

The survey also revealed that only 45.9% of Spaniards knew that Iberian ham requires a minimum of 20 months maturing, while 54.1% were unaware of this fact. These results highlighted a general lack of knowledge regarding the specific production characteristics of Iberian ham, despite its cultural and gastronomic importance in Spain. This highlighted a potential need for education and awareness-raising around this flagship product.

Spain, 2024, %

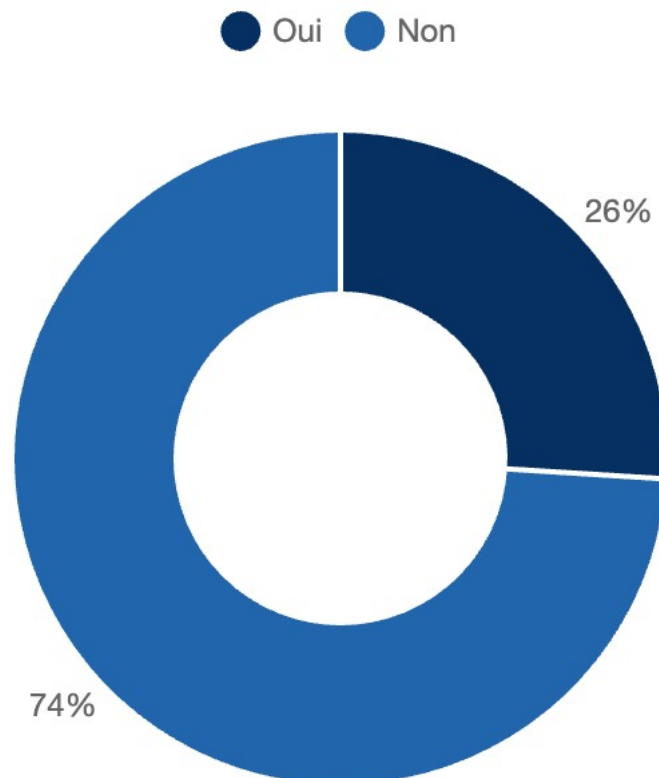


Source : [Consumidora](#)

What's more, only 26% of Spaniards said they knew the difference between Serrano ham and Iberian ham, compared to 74% who didn't know.

Know the difference between Serrano and Iberian ham

Spain, 2024, % (%)

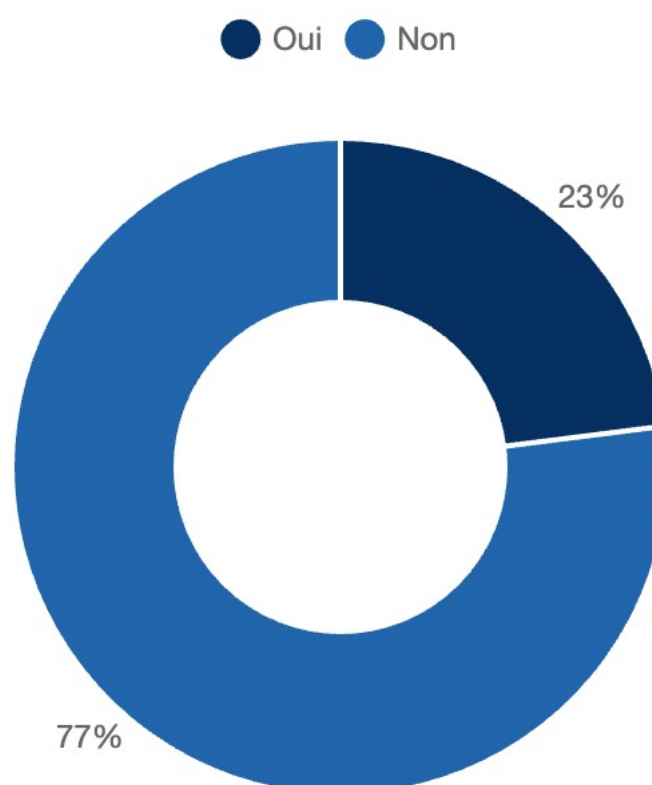


Source: [Consumidora](#)

Finally, only 23% of Spaniards claimed to know about the Montanera, the period during which Iberian pigs feed on acorns in the dehesas, while 77% were unaware of this key concept linked to the production of quality Iberian ham.

Knowledge of Montanera

Spain 2024, % of sales



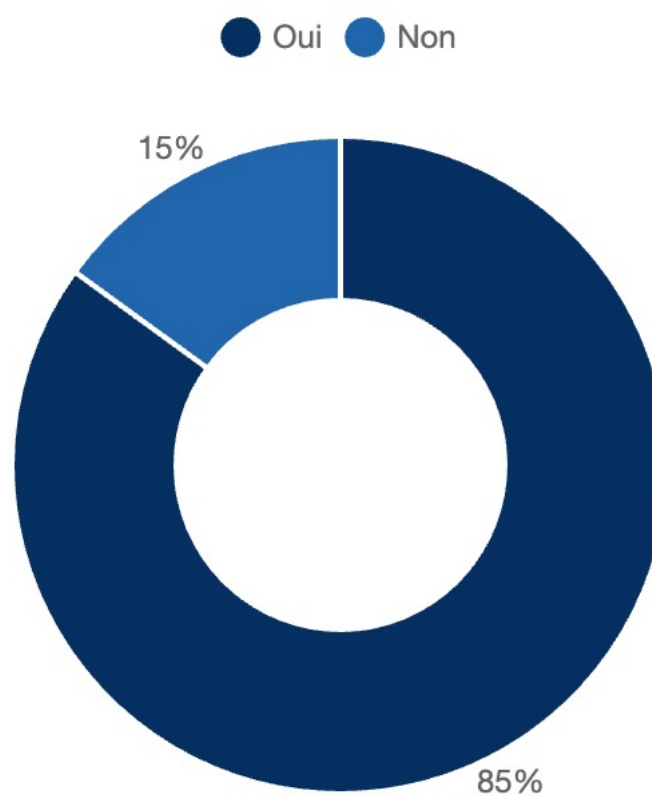
Source: [Consumidora](#)

Consumption habits:

In 2023, 85% of the Spanish population had consumed Iberian ham.

Spaniards who ate Iberian ham in 2023

Spain, 2023, % of population



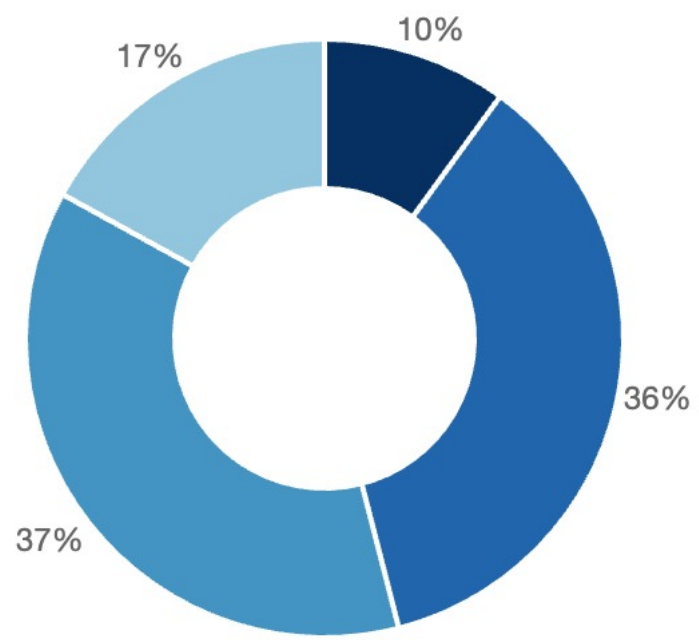


Source: [Cárnica](#)
 In terms of Iberian ham consumption habits in 2024, **10%** of Spaniards ate Iberian ham every week, while **36%** said they ate it at least once a month. The relative majority, **37%**, consumed Iberian ham once every two or three months, and **17%** did so with greater frequency than the other categories.

Iberian ham consumption habits

Spain, 2024, % of total

- Chaque semaine
- Au moins une fois par mois
- Une fois tous les 2/3 mois
- Moins de fréquence que les autres catégories

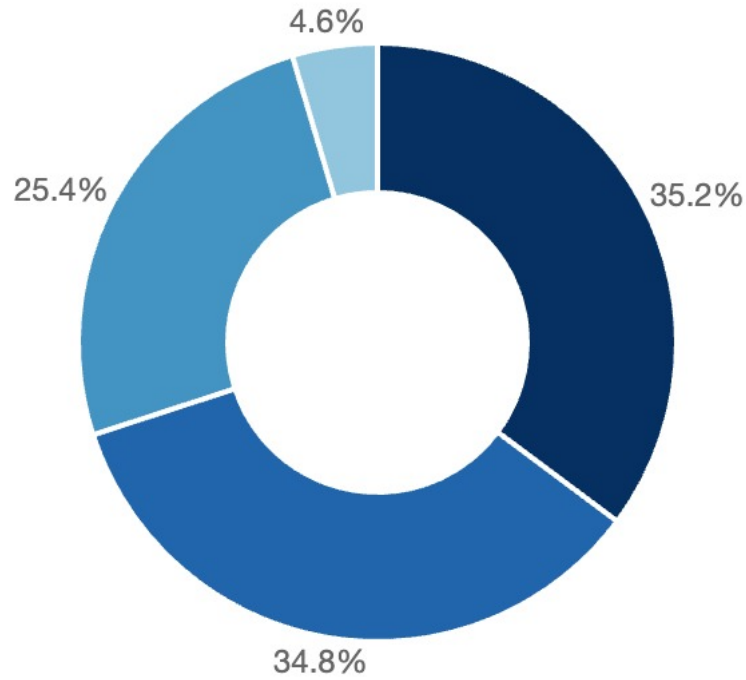


Source: [Consumidora](#)
 Finally, when it comes to the best time to eat Iberian ham, **52.1%** of Andalusians prefer to eat it at breakfast, reflecting a strong regional tradition. In the rest of the country, the preferred time to enjoy ham was dinner, chosen by **62.4%** of Spaniards. This confirms that, for the majority, dinner is perceived as the best time to enjoy this emblematic product. In Spain in 2024, preferences for purchasing formats of Iberian ham were varied. The most popular format was **sliced and packaged**, chosen by **35.2%** of consumers, closely followed by **delicatessen (from supermarkets)**, with **34.8%**. Buying **by the piece, for cutting at home**, attracted **25.4%** of buyers, while only **4.6%** preferred buying **by the piece with cutting at the delicatessen**, a more traditional but minority format.

Preferred ham purchase formats

Spain, 2024, % of total

- Tranché et emballé
- En charcuterie (de GMS)
- En pièce, et découpe à la maison
- En pièce, et découpe chez le charcutier

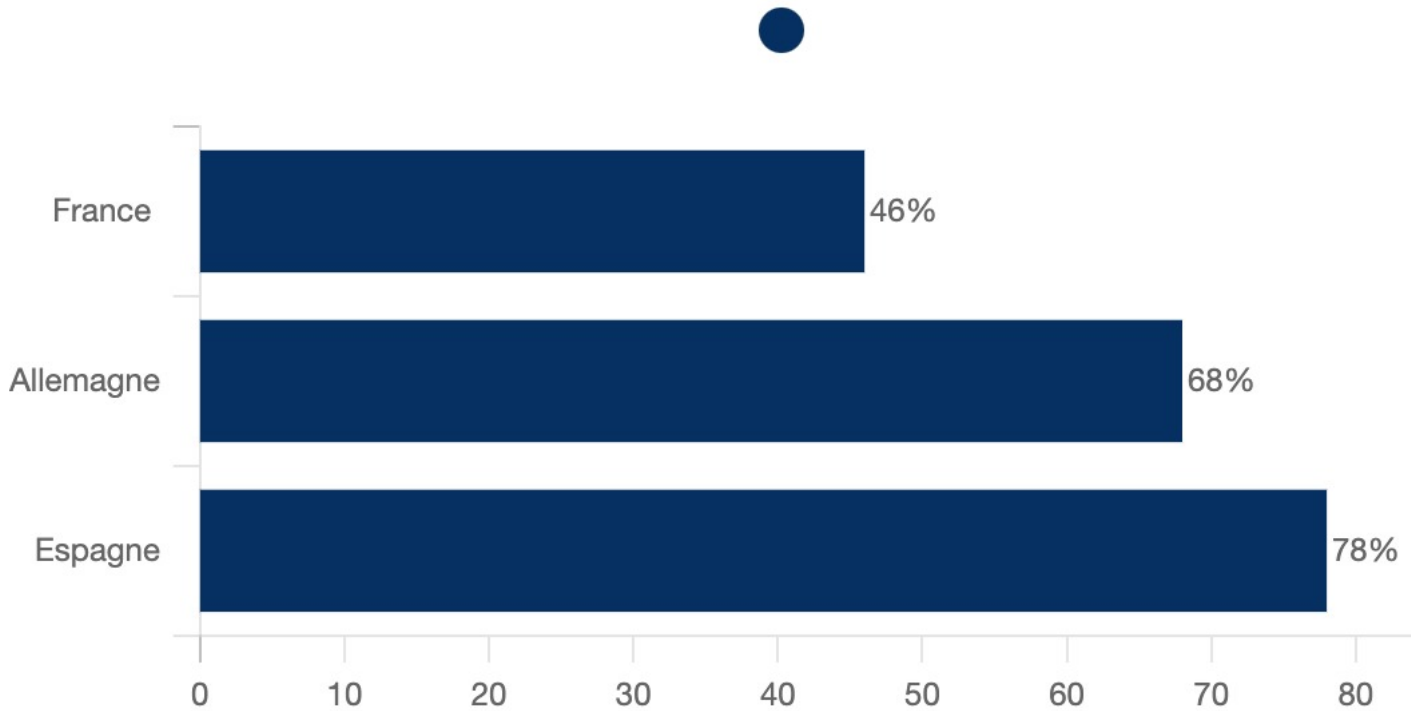


Source: [Consumidora](#)

Finally, among the most important criteria for buying an Iberian ham, we note that for **18-35 year-olds**, **price** was the most important criterion in their consumption choices. On the other hand, for consumers **over 56**, **knowledge of the product** and its **quality** were of prime importance. It's also worth noting that in France and Germany, ham consumption is particularly associated with the festive season.

Taste as the main purchasing criterion

Europe, 2024, % (in %)

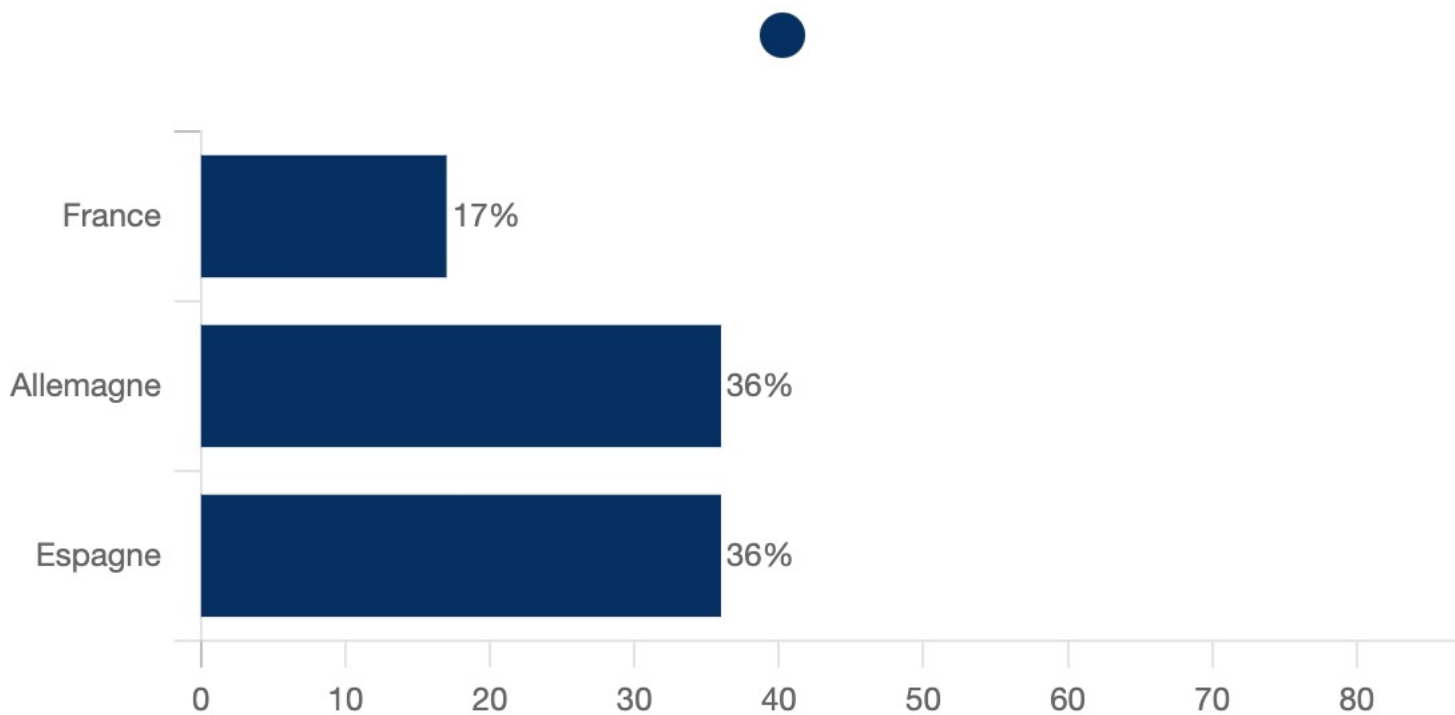


Source: [Cámica](#)

this new demand trend.

Perception of animal welfare in relation to ham

Europe, 2024, % (in %)



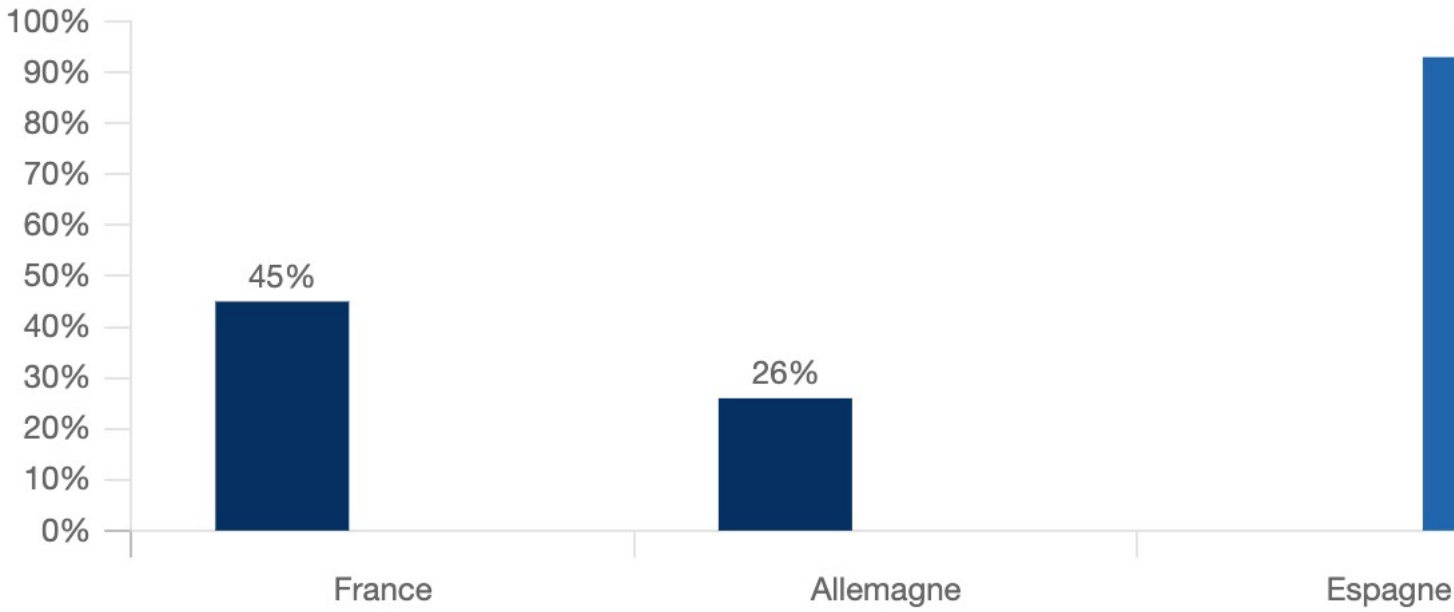
Source: [Cámica](#)

In 2024, the main barriers to buying Iberian ham varied from one European country to another. In France, 45% of consumers identified availability as a major barrier, while in Germany the proportion was lower, at 26%. Price was a significant barrier for 93% of respondents, with Spaniards highlighting this criterion as the main barrier, unlike other countries.

Main barriers to purchase

Europe, 2024, % of total

● Disponibilité ● Prix

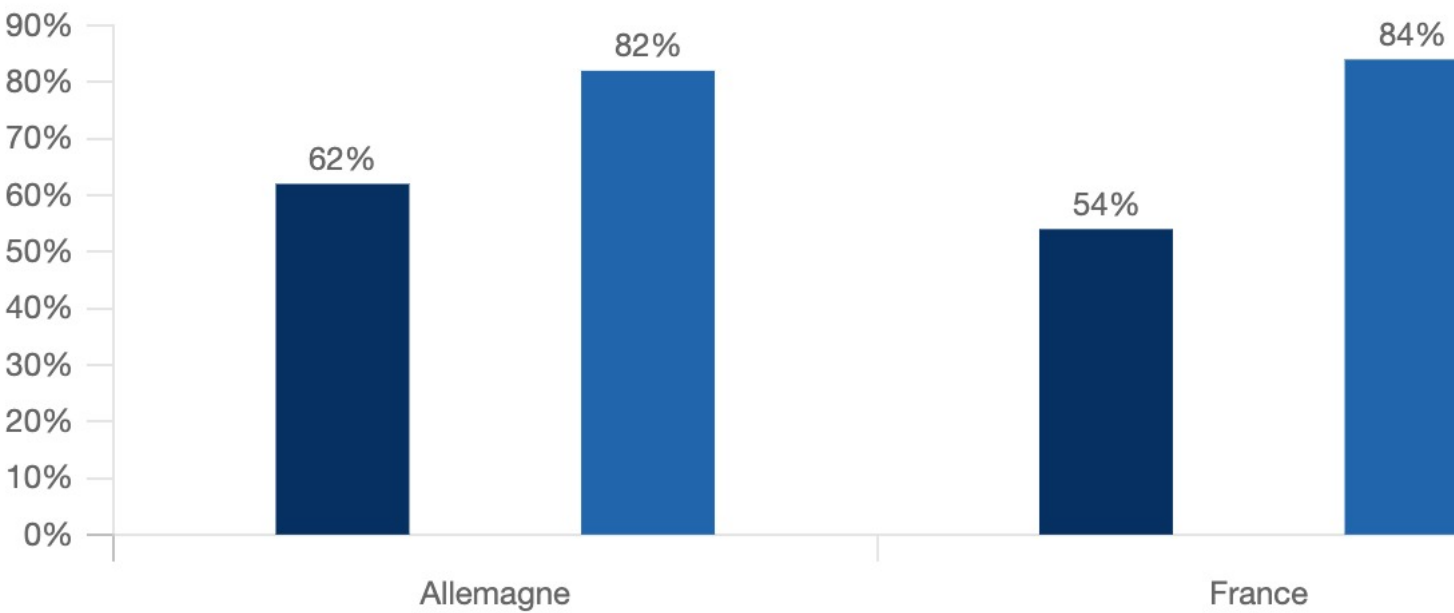


Source : [Cárnica](#)
In 2023, consumption of Iberian ham was slightly higher in Germany than in France, with **62% of Germans** buying this product versus **54% of French**. Cured ham, on the other hand, met with similar demand in both countries, with **82% of Germans and 84% of French** making this purchase. **Also, the high proportion of consumers who consumed cured ham points to potential outlets for Iberian ham in these countries.**

Germans, French and cured ham

Europe, 2024, % of total

● Ont acheté du jambon ibérique en 2023 ● Ont acheté du jambon cru en 2023



Source: [Cárnica](#)

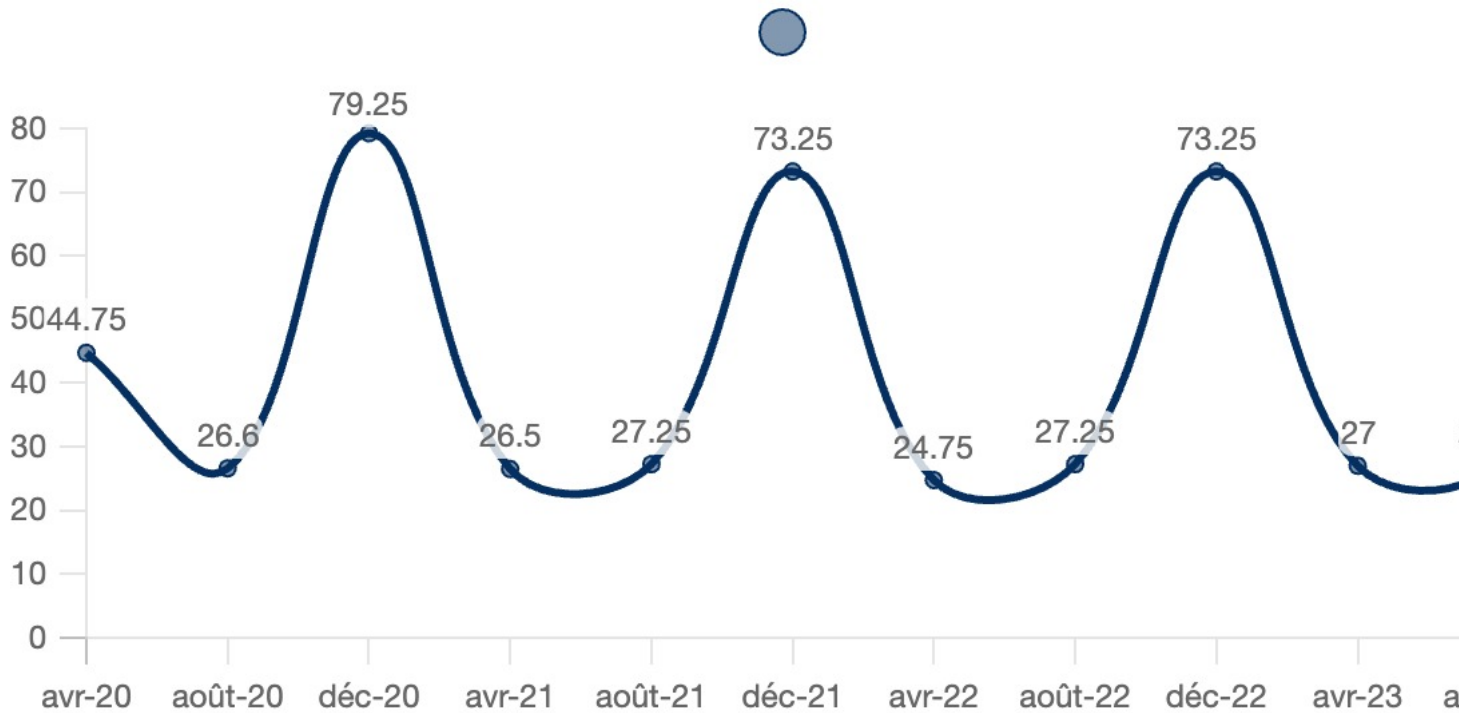
2.5 Seasonality of ham consumption

Between 2020 and 2023, interest in the term "jamón" in Spain, as measured by Google Trends indices, reveals strong **seasonality** linked to consumption of this emblematic product. The data show notable peaks in December each year, clearly illustrating its association with the **festive season**, a period traditionally marked by an increase in demand for festive products, including in particular, Iberian ham.

- **December 2020:** The index reaches **79.25**, one of the highest levels observed, underlining its importance during the Christmas celebrations.
- The same trends are repeated in **December 2021(73.25)** and **December 2022(73.25)**, confirming the key role of this period in ham consumption.
- By contrast, the months of **April** and **August** show much lower indices, fluctuating between **24.75** and **27.25**, reflecting less interest outside the festive season.

"Jamón" search interest in Spain

Spain, 2020-2023, google Trends indexes



Source : [Google Trends](https://www.google.com/trends/)

Demand analysis

2.6 Towards the internationalization of Iberian ham

Iberian ham, the emblem of Spanish gastronomy, is experiencing unprecedented international expansion, driven by an ambitious promotional strategy and growing consumer appeal for these premium products. Its exceptional quality, artisanal production process and unique flavours make it the product of choice on world markets. Thanks to targeted campaigns and strategic collaborations, Iberian ham and Serrano are gradually establishing themselves as essential gastronomic references in many countries, reinforcing their image as symbols of Spanish culinary excellence.

- **Mexico:**
The Mexican market has established itself as one of the main outlets for Serrano ham outside Europe, with a **15% increase in imports by 2024, reaching 2,500 tons**. Promotional campaigns, collaborations with local chefs and improved distribution in major chains have helped to meet Mexican consumers' growing interest in this gourmet product. Despite the challenge of high prices, Mexico offers significant growth potential for Serrano ham, consolidating its place in local gastronomy.
- **Netherlands:**
In the Netherlands, Serrano ham continues to grow in popularity, with **exports set to increase by 12.71% in 2024**. Targeted initiatives, such as training courses for professionals and partnerships with local media, have raised its profile. CJSE has succeeded in positioning this quality product as a gastronomic benchmark, responding to Dutch consumers' growing interest in premium foods.
- **China:**
Since 2018, China has become a key market for Iberian ham, **with a 104% growth in exports over five years (to 2023)**. ASICI's awareness campaigns have reached 700 million consumers, incorporating training for professionals and culinary events. This market, often perceived as prestigious and sophisticated, represents a strategic opportunity for the Iberian sector, with solid growth prospects.
- **United Kingdom:**
With 1,685.76 tons exported in 2023, the UK represents a strategic opportunity for Serrano ham. Widespread availability in all the major supermarket chains reflects a marked interest on the part of British consumers. Promotional efforts, notably at events such as *The International Food & Drink Event*, have strengthened the awareness and reputation of this flagship product of Spanish gastronomy.
- **Germany:**
Germany is one of the main European markets for Iberian ham. In 2024, educational initiatives such as support for the "Koch des Jahres" competition raised the profile of this gourmet product. ASICI's targeted campaigns helped boost the presence of Iberian ham in gastronomy schools, restaurants, and culinary events, consolidating its place among Germany's benchmark gastronomic products.

Conclusion:

Iberian ham, a true luxury product, stands out for its exceptional quality, its artisanal production process and its unique character, all of which give it high added value. Thanks to targeted, ambitious promotional strategies, it is gradually establishing itself as a benchmark on international markets. Buoyed by growing demand for premium products, Iberian ham is set for a flourishing future, consolidating its role as a symbol of Spanish gastronomic excellence on the international stage.

Sources : Cárnica : [Mexico](#), [Alemania](#), [Reino Unido](#), [Países Bajos](#), [China](#)

Market structure

3.1 Ham production

ham-making, a natural, artisanal process:

Ham-making is a meticulous and complex process, based on traditional skills handed down from generation to generation. It combines tradition, natural conditions and modern techniques to produce a product of excellence. Here are the detailed steps in the ham-making process, as practiced by renowned producers such as Nevadensis.

1. Raw material selection

- **Inspection and selection of pieces:** Each piece of meat is rigorously inspected to guarantee optimum quality right from the start.
- **Rejection of non-conforming parts:** Any part that fails to meet quality standards is returned to the supplier.
- **Food safety guarantee:** The parts selected are chosen according to rigorous criteria to meet sanitary requirements.

2. Traceability and initial inspection

- **Certificate creation:** Each piece is registered with a unique certificate that tracks its entire production cycle, like a ham "DNI".
- **Quality analysis:** pH and temperature measurements to ensure that meat meets stability and maturation requirements.

3. Curing

- **Exclusive use of sea salt:** Salting with natural sea salt promotes dehydration and prevents the development of pathogenic micro-organisms.
- **Even distribution:** The salt is applied evenly to the piece, contributing to preservation while intensifying the ham's aromas and flavors.

4. Washing

- **removal of excess salt:** After the curing period, the pieces are washed with jets of cold water to remove any residual salt on the surface.

5. Post-salting

- **Even salinity distribution:** During this phase, salinity is stabilized throughout the room. Temperature and humidity are controlled to ensure balanced dehydration.

6. Drying and curing

- **Natural conditions:** Hams are hung in natural drying rooms, where clean, fresh air plays a key role.
- **Duration:** This stage can last between 3 and 6 months, depending on the size of the piece and climatic conditions.
- **Transformation of fat:** The fat infiltrates the muscle fibers, enriching the flavors and developing the characteristic aromas of the ham.

7. Ripening

- **Extended curing:** Pieces are transferred to temperature- and humidity-controlled cellars for further maturing.
- **Flavor development:** Natural enzymatic reactions create complex, subtle flavors. This stage lasts between 14 and 36 months for Iberian hams.

8. Application of manteca

- **Piece protection:** A layer of fat (manteca) is applied to prevent drying out and protect the pieces during the final phase.
- **Filling cracks:** Manteca fills invisible cracks to maintain product integrity.

9. Final quality control

- **Artisan inspection:** Master jamoneros (ham makers) assess the condition of the pieces, checking texture, flavor and appearance.
- **Certification:** Labels such as DOP or IGP are affixed to guarantee product origin and quality.

Source : [\[Nevadensis\]](#)

Market structure

3.2 Production

Between 2017 and 2023, ham production in Spain showed interesting variations, both for dry and cooked hams and shoulders.

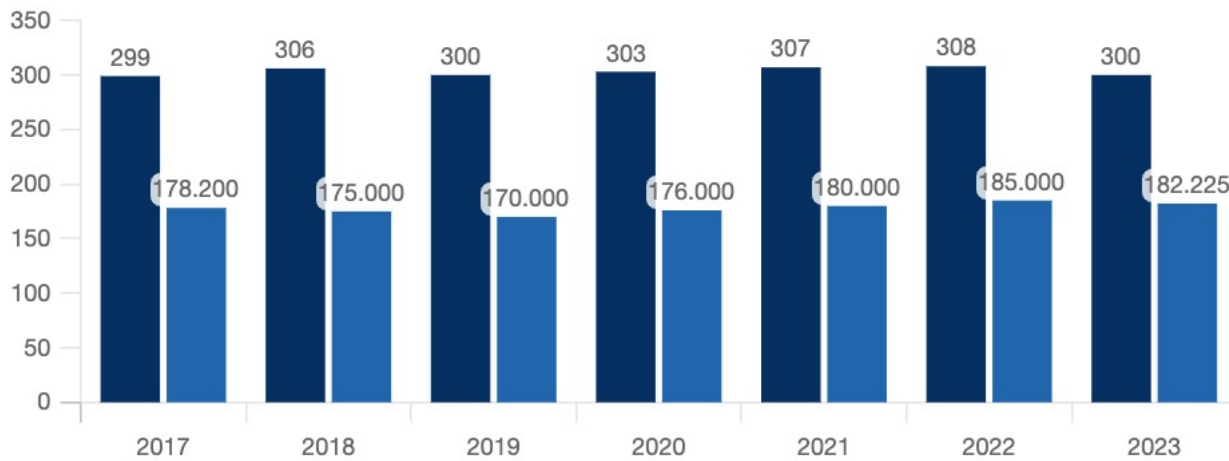
For dry-cured hams and shoulders, production rose slightly from **299,000** tons in 2017 to **308,000** tons in 2022(+3.0%). However, in 2023, a slight decline was recorded, with production of **300,000** tonnes(-2.6% compared to 2022).

By contrast, production of cooked ham and shoulder has followed a more marked trajectory, although it fell slightly between 2017 and 2019, from **178,200** tonnes to **170,000** tonnes(-4.6%). Since 2020, production has gradually increased, reaching **182,225** tonnes in 2023(+7.2% on 2020). This marks a recovery and continued growth in recent years.

Ham production in Spain 2

Spain, 2017-2023, thousands of tons

● Jambon et Épaule Secs ● Jambon et Épaule Cuits

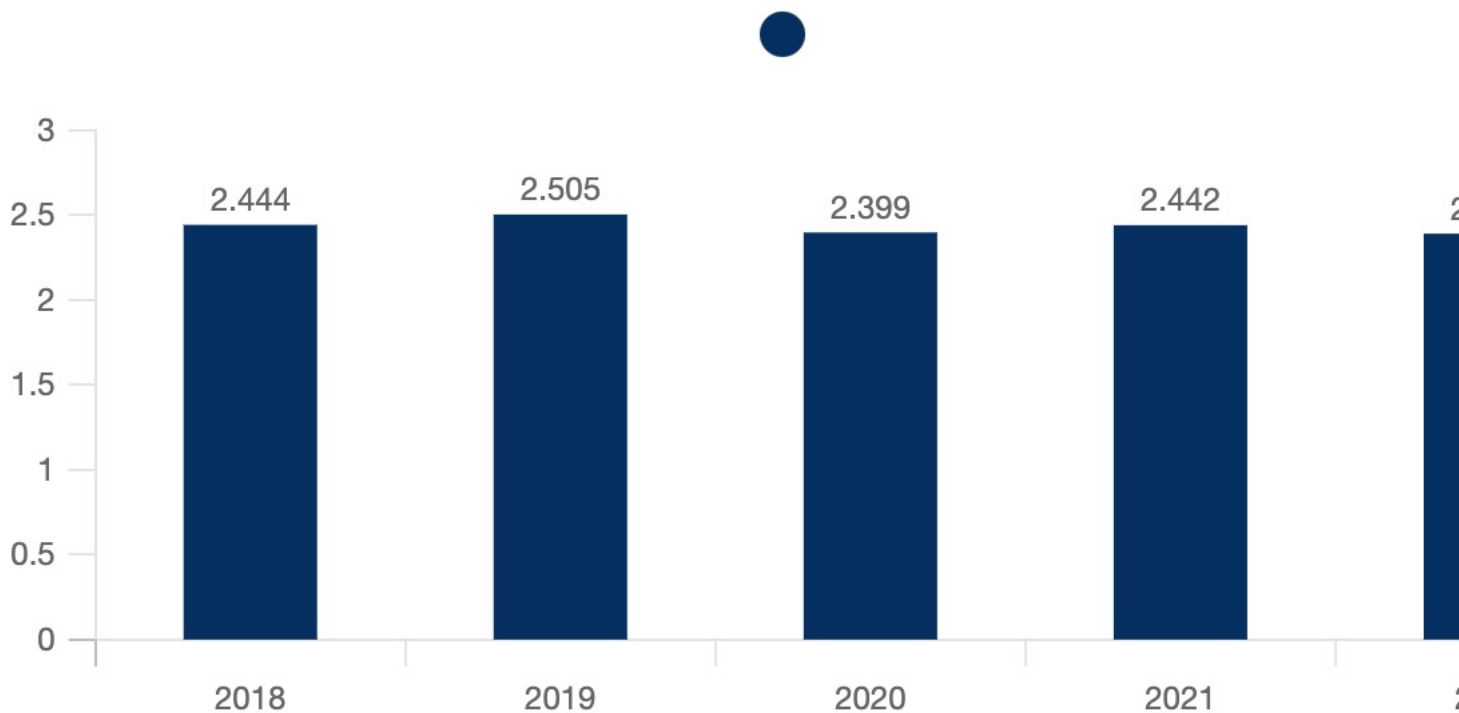


Anice

Although in 2022 there were some **1,500 companies dedicated to ham production**, the statistical codes defined by the INE do not allow for a more precise approach to the market than the "processed meat production" product category. Although the following figures therefore include other types of product, they are still the most accurate for studying ham production. Thus, between 2018 and 2022, the number of companies dedicated to the production of meat products in Spain fluctuated slightly, from **2,444 thousand** in 2018 to **2,392 thousand** in 2022, an overall drop of **2.13%**. After a moderate rise in 2019(+2.5%) to **2,505 thousand**, this figure fell in 2020(-4.2%) before stabilizing in 2021(+1.8%).

Evolution of the number of companies dedicated to the production of meat products

Spain, 2018-2022, thousands of companies



Source : [INE](#)

Iberian ham production zones:

Iberian ham is one of the most emblematic products of Spanish gastronomy, and its quality is closely linked to the production areas. The main regions producing Iberian hams and paletas are located mainly in the **south** and **southwest** of Spain, areas that meet very specific criteria in terms of climate, geography and the quality of the **dehesas** where Iberian pigs are raised. The combination of these natural factors contributes to the unique taste and superior quality of Iberian ham.

- **Guijuelo (Salamanca):**

The **Guijuelo** region, located in the province of **Salamanca**, is one of the most prestigious production areas for Iberian ham. Guijuelo was Spain's first **Denomination of Origin (D.O.)** for Iberian ham, and is famous for its **mild, fruity, melt-in-the-mouth flavor**. Guijuelo's **continental Mediterranean climate**, with very cold winters and hot, dry summers, is perfect for drying and curing hams. Rainfall is low and the average temperature fluctuates between 25° and 35°, which favors the curing process.

The **mountainous geography** of the region, surrounded by the Cordillera Central, the Montes de Toledo and the Sierra Morena, as well as plains and valleys at an average altitude of around 1,000 meters above sea level, also contribute to excellent ham curing. Guijuelo's **Iberian pigs** are fed mainly on acorns from the region's **dehesas**, which extend into the neighboring provinces of **Tolède, Ávila, Segovia and Zamora**, with cork and holm oak forests that favor the quality of the animals and the ham.

- **Extremadura:**

Extremadura is one of the most important regions for the production of **Iberian bellota ham**. The region's **dehesas** are ideal for rearing Iberian pigs, thanks to the quality of the pastures and the abundance of **acorns** in autumn. Extremadura's climatic conditions, with **hot summers** and **mild winters**, as well as its **mountainous terrain**, contribute to the optimal maturing of the ham.

Extremadura **ham** is highly prized for its characteristic deep flavor and marbled texture, the result of the combination of its natural diet and the curing process in traditional drying sheds.

- **Jabugo (Huelva):**

The **Jabugo** region, in the province of **Huelva**, is probably the best-known and most emblematic production area for **Iberian ham** in Spain. Located in the **Sierra de Arcena** mountains, Jabugo is famous for its exceptional quality **bellota** ham. The Iberian pigs raised in the **dehesas of Jabugo** feed on acorns and other natural products, giving them an unmistakable flavor.

The region's **microclimate**, with **wet winters** and **hot summers**, combined with its **altitude**, favors the curing process that makes Jabugo ham such a **gourmet product**. Ripening in **natural caves** in the Sierra allows the ham to develop a unique, complex flavor.

- **Los Pedroches (Córdoba):**

The **Los Pedroches** region, located in the province of **Córdoba**, is another renowned production area for **Iberian ham**. This region is particularly famous for its high-quality **bellota ham**, produced from **Iberian pigs** fed mainly on acorns, which grow abundantly in the region's **dehesas**.

The climate of Los Pedroches is Mediterranean, with **mild winters** and **hot summers**, ideal for the production of quality ham. **Pastures rich in** acorns, grasses and other natural vegetation are ideal for the pigs' diet, enabling the meat to develop an exceptional taste and texture. The region's **geography**, characterized by gently undulating terrain, also plays an important role in product quality, as it favors a **natural drying oven** for the hams.

Los Pedroches hams are renowned for their firm texture and intense flavor, with nutty aromas and a hint of dried fruit, characteristic of Iberian bellota ham.

Source : [\[Dehesacharra\]](#)

Market structure

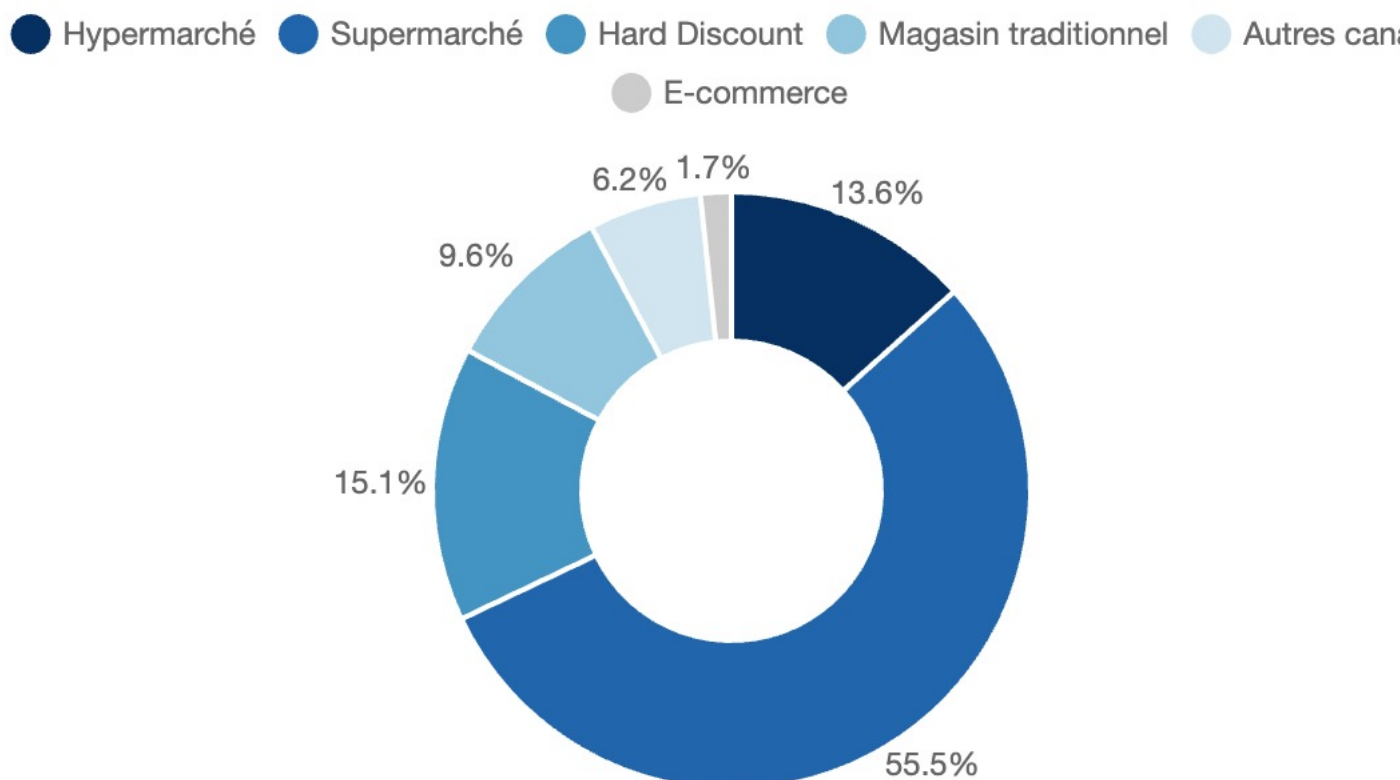
3.3 Distribution

Processed meat distribution:

In Spain in 2023, the processed meat market was largely dominated by **supermarkets**, which captured **55.5%** of market share, confirming their central role in the distribution of these products. **Hard discount chains** came second with **15.1%**, followed by **hypermarkets** with **13.6%**. **Traditional stores** maintained a significant presence with **9.6%**, while **other channels** contributed **6.2%** of sales. Finally, **e-commerce**, although still marginal, accounted for **1.7%**, demonstrating growth potential in this segment. This breakdown illustrates the predominance of the major retailers, while leaving a significant place for alternative and traditional channels.

Distribution of market share by retailer in the processed meat market

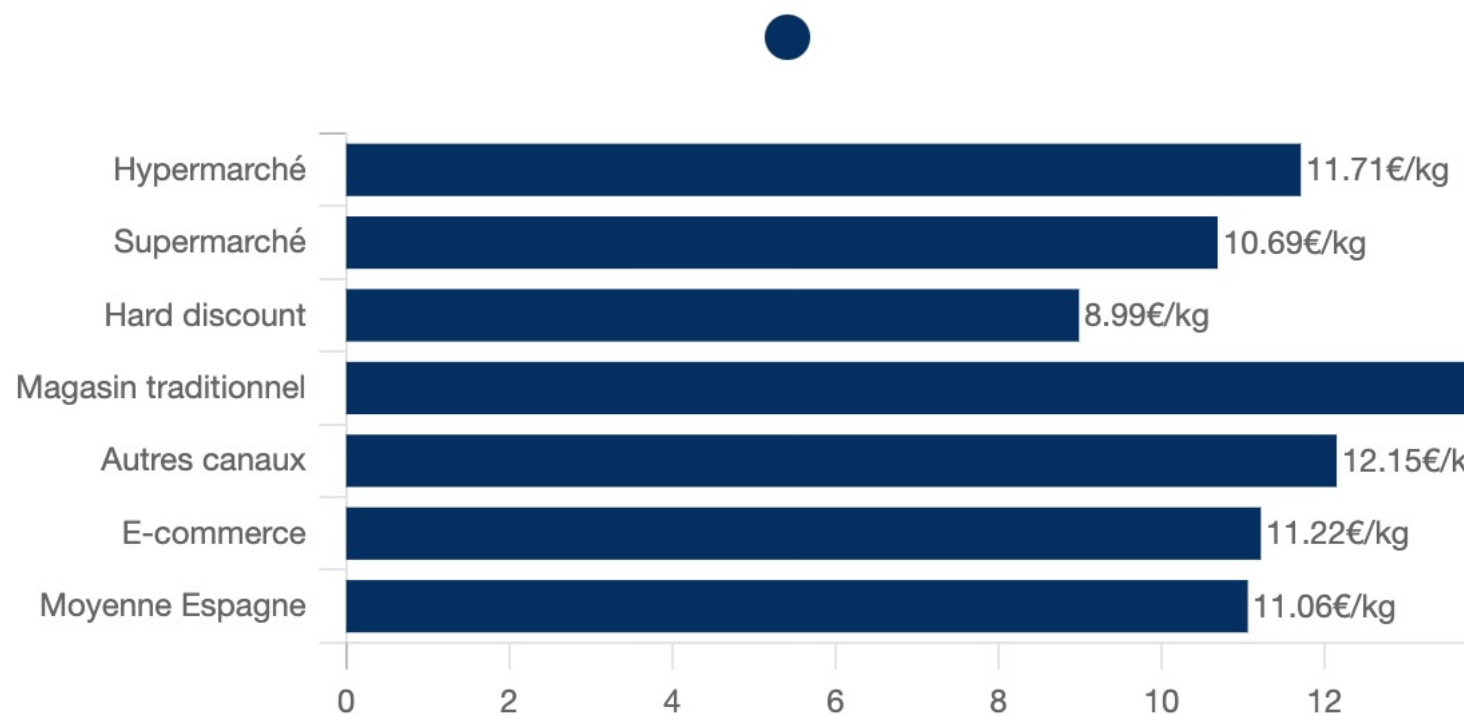
Spain, 2023, % (in %)



The average price of processed meat, including ham, varied according to distribution channel. **Traditional stores** posted the highest price at **€14.84/kg**, followed by **other channels** at **€12.15/kg**. **Hypermarkets** and **e-commerce** offered slightly lower prices, at **€11.71/kg** and **€11.22/kg** respectively, while **supermarkets** were below the national average (**€10.69/kg**). **Hard discounters** offered the most competitive prices, at **€8.99/kg**, well below the **Spanish average of €11.06/kg**, reflecting a noticeable variation between different types of retailers.

Processed meat prices by distribution channel

Spain, 2023, % (%)



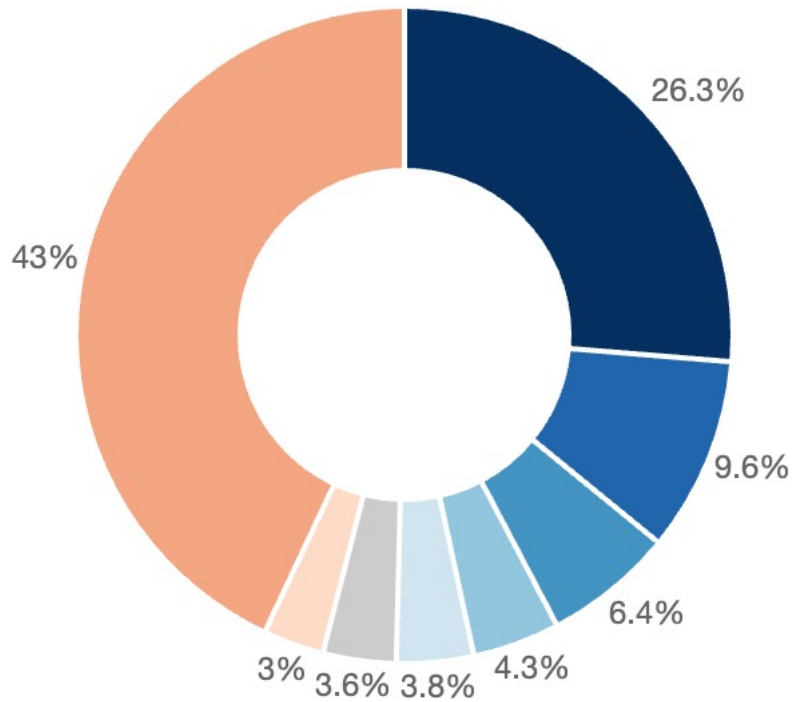
Source : MAPA

Reminder of distribution market shares:

In Spain in 2024, Mercadona dominated the retail market with a market share of **26.3%**, confirming its position as undisputed leader. Carrefour came second with **9.6%**, while Lidl ranked third with **6.4%**. Other players, such as Eroski (**4.3%**), Dia (**3.8%**), Consum Coop (**3.6%**) and Al Campo (**3%**), posted more modest market shares. Finally, the rest of the sector was fragmented, with **43%** split between various distributors, underlining the diversity of supply in the Spanish retail landscape.

Distribution market share in Spain

Spain, 2024, % of total



Source : [KANTAR](#)

Butchers and delicatessens sector (specialized distribution):

Between 2018 and 2022, the butchery and delicatessen sector in Spain went through a period of fluctuations in both the number of businesses and the number of employees. The number of businesses fell slightly, from **24,295** in 2018 to **24,050** in 2022, representing an overall decline of **-1.0%**. However, this trend has followed an uneven trajectory: after a significant decline in 2019 (**-5.8%** on 2018), the sector recovered in 2020 (**+2.6%**) and 2021 (**+3.9%**), before falling back slightly in 2022 (**-1.4%**). These variations reflect the gradual adaptation of companies to structural and cyclical challenges.

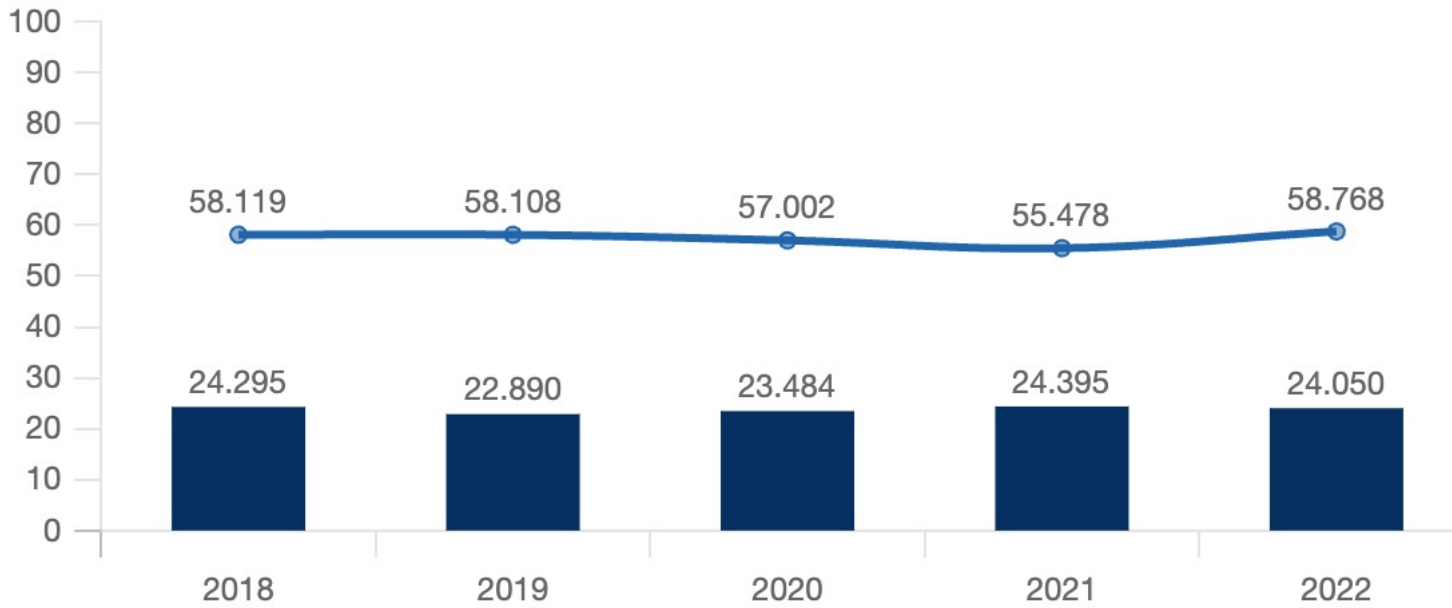
The number of employees has also seen marked changes. It rose from **58,119** in 2018 to **58,768** in 2022, showing a slight overall increase of **+1.1%** over the period. Nevertheless, this increase masks significant fluctuations. Between 2018 and 2021, a steady decline was recorded, reaching **-4.5%** in 2021 with **55,478 employees**, the lowest point of the period. This trend was reversed in 2022, when a notable upturn took place, with an increase of **+5.9%** on 2021, returning to a level slightly above that of 2018.

These variations reflect not only market transformations, but also the impact of economic and health crises, such as the COVID-19 pandemic, which disrupted consumer habits and supply chains. Despite these challenges, the slight growth in the number of employees in 2022 suggests a certain resilience in the sector and an adaptation to new market dynamics, notably through renewed demand for local, quality products.

Growth in the number of butchers and delicatessens

Spain, 2018-2022, thousands of companies, thousands of employees

● Nombre de salariés ● Nombre d'entreprises



Source : [INE](#)

Between 2018 and 2022, the butcher's and delicatessen sector in Spain showed a positive trend in terms of sales and gross operating surplus (EBITDA), despite fluctuations linked to economic dynamics and changes in consumption.

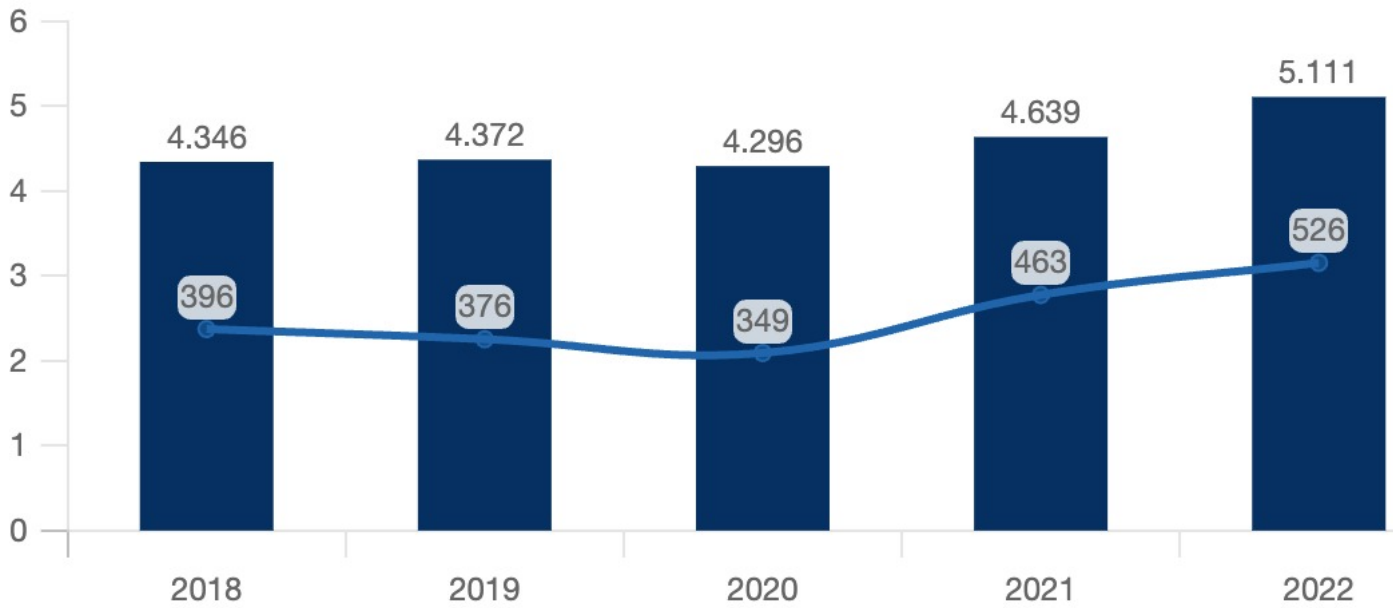
Sales rose significantly, from **4.346 billion euros** in 2018 to **5.111 billion euros** in 2022, an overall increase of **+17.6%**. This growth was not linear: after a slight increase in 2019(+0.6%), sales fell in 2020(-1.7%), impacted by restrictions linked to the COVID-19 pandemic and the decline in out-of-home consumption. However, the sector rebounded strongly in 2021(+8.0%) and maintained this momentum in 2022(+10.2%), reaching its highest level for the period.

Gross operating profit (EBITDA) also showed an upward trend, rising from **396 million euros** in 2018 to **526 million euros** in 2022, an overall increase of **+32.8%**. This figure illustrates an improvement in the sector's profitability, albeit marked by significant variations. After declines in 2019(-5.1%) and 2020(-7.2%), EBITDA recorded a clear rebound in 2021(+32.7%) and further growth in 2022(+13.6%).

These developments reflect the sector's successful adaptation to economic challenges, thanks in particular to an increase in demand for local, quality products during a period of economic recovery. By 2022, the high level of sales and EBITDA underlines not only the sector's resilience, but also its ability to capture value in a transforming market. This underlines the importance of effective resource and cost management in maintaining and improving profitability.

Sales and EBITDA trends in the Spanish butchery and delicatessen sector

Spain, 2018-2022, € billion, € million



Source : [INE](#)

Offer analysis

4.1 Offer typology

Differences between cured and cooked ham :

Cured ham:

Cured ham is a product **dried and matured** without cooking, giving it an intense flavor and firm texture.

- **Method of preparation:**
 - The meat (often the pork leg) is salted to remove moisture.
 - It is then left to dry in the open air or in cellars, sometimes for several months or even years (depending on the type of ham).
 - No cooking process is involved.
- **Famous examples:**
 - **Serrano ham** (Spain).
 - **Parma ham** (Italy).
 - **Bellota Iberian Ham** (Spain).
- **Characteristics:**
 - Intense, often salty flavor.
 - Firm but melt-in-your-mouth texture, especially in premium hams.
 - Dark red appearance with marbling of fat.
- **Consumption:**
 - Generally eaten in thin slices.
 - Accompanies cold dishes, tapas, or served on its own.

Cooked ham:

Cooked ham is a product **prepared by cooking**, which gives it a softer texture and milder taste.

- **Method of preparation:**
 - The meat is generally brined (soaked in a solution of salted water and aromatics).
 - It is then cooked at low temperature (in the oven or in hot water).
 - Sometimes it is also smoked after cooking.
- **Famous examples:**
 - **Jambon blanc** (France).
 - **Jambon à l'os** or roast ham.
 - **Prince de Paris ham**.
- **Characteristics:**

- Mild flavor, less salty than cured ham.
- Soft, moist texture.
- Uniform pink appearance.

- **Consumption:**

- Often used in sandwiches, croque-monsieur, quiches or gratins.
- Can be served hot or cold.

Difference between cured ham and Iberian ham:

- **Origin and breed of pig:**

Iberian ham is produced from Iberian pigs, a breed endemic to southwestern Spain and Portugal. These pigs are renowned for their ability to infiltrate fat into their muscle fibers, resulting in rich, complex flavors. White ham comes from white pigs, often breeds such as Duroc, Landrace, Large White or Pietrain, raised mainly on an intensive diet.

- **Nutrition:**

Iberian ham is classified according to the pigs' diet. Bellota ham comes from pigs fed on acorns and free-range pastures. Cebo de Campo ham comes from pigs fed a mixed diet, including pasture and cereals, in semi-free-range conditions. Finally, Cebo ham comes from pigs fed exclusively on compound feed on intensive farms. By contrast, the pigs from which white ham is produced are mainly fed cereals and compound feed.

- **Maturation process and duration :**

Maturation of Iberian ham can last from 14 to 36 months, with gradual natural drying to develop complex aromas. The curing period for cured ham is shorter, between 7 and 16 months, often accelerated in controlled environments.

- **Categories and denominations :**

Iberian ham is classified according to breed purity and diet. Labels use color codes to indicate quality: black for 100% Iberian Bellota, red for crossbred Bellota, green for Cebo de Campo and white for Cebo. White ham is classified by geographical labels such as Jamón Serrano, DOP Teruel or IGP Trévelez, and by terms indicating the length of maturation (Bodega for 9 months, Reserva for 12 months, Gran Reserva for 15 months).

- **Production and consumption:**

Iberian ham accounts for only 10% of Spanish production and is considered a top-of-the-range product, often reserved for special occasions. Cured ham, which accounts for 90% of production, is more affordable and suitable for everyday consumption.

Source : [JamonLovers](#)

Types of ham

Ham, the emblem of Iberian and Mediterranean gastronomy, is distinguished by its many varieties. These distinctions are based on the breed of pig, its diet, production techniques and quality labels. Here is an organized and enriched typology of the main types of ham:

1. Iberian ham

- **Origin:** Produced from Iberian pigs, mainly raised in southwest Spain and Portugal.
- **Characteristics:**
 - Free-range or semi-intensively raised pigs.
 - Fed on acorns (bellota) or cereals (cebo).
 - Matured for up to 36 months.
 - Melting texture and intense flavor.
- **Famous variants with DOP:**
 - **DOP Jabugo:** Produced in the Sierra de Aracena, benefiting from an ideal microclimate.
 - **DOP Guijuelo:** From Salamanca, with a mild flavor and subtle aroma.
 - **DOP Dehesa de Extremadura:** Produced in the rich dehesas of Extremadura.
 - **DOP Los Pedroches:** Produced in the north of Cordoba, with 100% Iberian pigs.

2. Serrano ham

- **Origin:** Made from white pigs (Landrace, Duroc or Large White) raised in mountainous areas.
- **Characteristics:**
 - **Traditional Speciality Guaranteed (TSG)** by the European Union.
 - Minimum maturation period of 30 weeks in a cool, dry environment.
 - Mild flavor and slightly pinkish color.
- **Variants:**
 - **Consorcio del Jamón Serrano Español:** Extended ripening (45 weeks) with 100% Spanish origin.

3. Bellota ham

- **Origin:** From free-range Iberian pigs fed exclusively on acorns during montanera.
- **Characteristics:**
 - Superior quality and delicate texture thanks to unsaturated fats.
 - Deep flavor with woody and dried fruit notes.

4. White ham

- **Origin:** Produced from farm-raised, grain-fed white pigs.
- **Characteristics:**
 - Intended for mass consumption.
 - Light flavor and more affordable price.
 - Example: **DOP Teruel**, low in cholesterol and salt.

5. Regional hams with DOP

- **DOP Teruel:** Produced from white pigs in mountainous areas of the province of Teruel. Mild and low in salt content.
- **DOP Trévelez:** Produced in the Sierra Nevada, using only sea salt and a long curing process.

6. Parma Ham

- **Origin:** Produced in the Parma region of Italy.
- **Characteristics:**
 - Minimal salting for a mild, refined flavor.
 - Slow ripening (up to 12 months), no artificial preservatives.

7. Cooked ham (or "York" ham)

- **Origin:** Prepared from hind legs treated with brine before cooking.
- **Characteristics:**
 - Tender texture and pinkish color.
 - Different grades available (extra, first and second).

8. Pavo ham (turkey)

- **Origin:** Made from turkey legs.
- **Characteristics:**
 - Low fat content.
 - Rich in proteins, vitamins and minerals.
 - Ideal for low-calorie diets.

9. Paletilla (shoulder)

- **Origin:** Made from the forelegs of pigs.
- **Characteristics:**
 - Smaller size and lower cost than ham.
 - More intense flavor due to shorter curing time.

10. Specific variants

- **Jamón de Huelva (DOP):** Similar to Jabugo, with a production process based on traditional techniques.
- **Jamón de Guijuelo (DOP):** Renowned for its mildness and exceptional quality.
- **Jamón de Extremadura (DOP):** Produced in a favorable natural environment with 100% Iberian pigs.

11. Duroc Ham

- **Origin:** Produced from Duroc pigs, renowned for their fat infiltration.
- **Characteristics:**
 - Intense flavor and juicy texture.
 - Often used for premium Serrano hams.

Source: [La Trastienda Sanxenxo](#)

Offer analysis

4.2 Offer segmentation

The **price-based** segmentation of the Spanish ham market is structured around different categories, reflecting both product quality and consumer expectations:

1. Premium segment

- **Characteristics:** Mainly **Iberian bellota** ham, recognized for its artisanal production, the quality of the meat from acorn-fed pigs, and a long maturing period (24 to 36 months).
- **Price:** Very high, often over **€80-100/kg**.
- **Target:** Consumers looking for exclusive products, often for special occasions or celebrations, and attached to quality labels (DOP, 100% Iberian).
- **Examples:** Brands such as Cinco Jotas, Carrasco Guijuelo.

2. Medium-high segment

- **Characteristics:** **Iberian cebo de campo** or **cebo** hams, from pigs raised in semi-free-range or intensive farming conditions, fed on piensos (compound feed). Matured for a shorter period than bellota (12 to 24 months).
- **Price:** Between **€40 and €80/kg**.
- **Target:** Consumers looking for a superior-quality product at a more affordable price than bellota.
- **Examples:** Iberian hams from less prestigious brands or sold in supermarkets.

3. Intermediate segment

- **Characteristics:** Includes quality **jamón serrano**, often produced from white pigs (Duroc, Large White). Maturation varies between **9 and 15 months**.
- **Price:** Between **€20 and €40/kg**.
- **Target:** Households looking for a good-quality product for regular consumption or for special occasions.
- **Examples:** Jamón serrano Reserva or Gran Reserva.

4. Economy segment (entry-level)

- **Characteristics:** Includes industrial serrano or curado hams, with minimal maturing (9 months). These products feature a standardized taste and a competitive price.
- **Price:** Below **€20/kg**.
- **Target:** Price-sensitive consumers, often for daily consumption or sliced for sandwiches.
- **Examples:** Private labels or hams sold in large packs.

5. Low-cost segment

- **Characteristics:** Hams generally from intensive farming, sometimes with shortened maturing processes. Less aromatic, these products aim to satisfy a basic demand.
- **Price:** Below **€10/kg**.
- **Target:** Consumers looking for the lowest price, often for family consumption or culinary use.
- **Examples:** Distributor brands of major retail chains.

- The **premium** and **medium-high** segments are **growing**, driven by a move upmarket by consumers attached to the quality and prestige of Iberian ham.
- The **economy** and **low-cost** segments dominate in terms of volume, but their growth is limited by lower margins and intense competition from private labels.

Offer analysis

4.3 Prix

Les tableaux ci-dessous présentent de façon non exhaustive l'offre de jambons au sein de la grande distribution en Espagne en décembre 2024 :

Offre de Mercadona en Décembre 2024 :

Type de Jambon	Produit	Format	Prix Unitaire	Marque
Jambons Ibériques	Paleta de cebo ibérica La Hacienda del ibérico	100 g	4,90 €/ud.	La Hacienda del ibérico
	Paleta de cebo ibérica La Hacienda del ibérico	5 kg (approx.)	58,00 €/ud.	La Hacienda del ibérico
	Jamón cebo ibérico cortado a máquina	160 g (approx.)	8,24 €/ud.	-
	Jamón cebo ibérico cortado a cuchillo	90 g (approx.)	5,85 €/ud.	-
Jambons Serrano	Jamón serrano Incarlopsa lonchas extrafinas	120 g	2,45 €/ud.	Incarlopsa
	Jamón serrano lonchas Incarlopsa	240 g	4,10 €/ud.	Incarlopsa
	Jamón serrano medias lonchas Jamcal	2 x 120 g	4,15 €/pack	Jamcal
	Jamón serrano reserva cortado a cuchillo	90 g (approx.)	3,51 €/ud.	-
	Jamón serrano gran reserva Costa Brava sin aditivos	90 g	2,30 €/ud.	Costa Brava
	Jamón serrano cortado a máquina	160 g (approx.)	3,68 €/ud.	-
Jambons Cuits	Jamón cocido extra Hacendado finas lonchas	2 x 225 g	3,45 €/pack	Hacendado
	Jamón cocido Hacendado lonchas	200 g	2,41 €/ud.	Hacendado
	Jamón cocido extra Hacendado finas lonchas	200 g	2,05 €/ud.	Hacendado
	Jamón cocido extra sándwich Hacendado lonchas	250 g	2,05 €/ud.	Hacendado
	Jamón cocido Noel lonchas	120 g	2,30 €/ud.	Noel
	Pechuga de pavo bajo en sal Hacendado finas lonchas	2 x 200 g	3,55 €/pack	Hacendado
	Pechuga 92% pavo Hacendado lonchas	200 g	2,65 €/ud.	Hacendado
	Pechuga de pavo Noel lonchas muy finas	200 g	2,20 €/ud.	Noel
	Jamón cocido extra Hacendado lonchas	-	-	Hacendado
Autres Types de Jambon	Taquitos de jamón Incarlopsa	2 x 100 g	2,65 €/pack	Incarlopsa
	Mini taquitos de jamón Incarlopsa	2 x 90 g	2,65 €/pack	Incarlopsa
	Jamón de Trevélez lonchas extra finas Antonio Álvarez	120 g	3,50 €/ud.	Antonio Álvarez
	Jamón serrano gran reserva Costa Brava sin aditivos	90 g	2,30 €/ud.	Costa Brava
	Jamón serrano reserva cortado a cuchillo	90 g (approx.)	3,51 €/ud.	-

Offre de Al campo en décembre 2024 :

	Produit	Format	Prix Unitaire (€)	Marque	Informations supplémentaires
Jambon cuit	CAMPOFRÍO Jamón cocido cortado en lonchas 75 g.	75 g	0,98	CAMPOFRÍO	Refrigerado
	CAMPOFRÍO Jamón cocido extra 200 g.	200 g	2,09	CAMPOFRÍO	Refrigerado
	AUCHAN Jamón cocido extra 200 g.	200 g	1,89	AUCHAN	Producto Alcampo, refrigerado
	AUCHAN Jamón cocido en lonchas 100 g.	100 g	1,29	AUCHAN	Producto Alcampo, refrigerado
	SÁNCHEZ ALCARAZ Jamón cocido cortado en lonchas 120 g.	120 g	1,49	SÁNCHEZ ALCARAZ	Sin gluten, sin lactosa, refrigerado
	EL POZO Jamón cocido extra 200 g.	200 g	2,49	EL POZO	Refrigerado
	CAMPOS DE ESPAÑA Jamón cocido 150 g.	150 g	1,69	CAMPOS DE ESPAÑA	Refrigerado
	EL POZO Jamón cocido 100 g.	100 g	1,09	EL POZO	Refrigerado
	ANTONIO VILA Jamón cocido extra 300 g.	300 g	3,29	ANTONIO VILA	Refrigerado
	NAVIDUL Jamón cocido extra 250 g.	250 g	2,79	NAVIDUL	Refrigerado
Serrano	AUCHAN Jamón serrano reserva (curación mínima de 12 meses) cortado en lonchas 100 g.	100 g	2,49	AUCHAN	Producto Alcampo, refrigerado
	AUCHAN Jamón serrano reserva (curación mínima de 12 meses) cortado en lonchas 250 g.	250 g	4,26	AUCHAN	Producto Alcampo, refrigerado
	AUCHAN Jamón serrano gran reserva 15 meses 150 g.	150 g	3,49	AUCHAN	Producto Alcampo, refrigerado
	AUCHAN Jamón serrano bodega (10 meses de curación) cortado en lonchas 250 g.	250 g	3,99	AUCHAN	Producto Alcampo, refrigerado
	AUCHAN Jamón serrano reserva 200 g.	200 g	3,99	AUCHAN	Producto Alcampo, refrigerado
	EL POZO Jamón serrano extra 150 g.	150 g	3,20	EL POZO	Refrigerado
	EL POZO Jamón serrano gran reserva 18 meses 200 g.	200 g	5,49	EL POZO	Refrigerado
	PRODUCTO ECONÓMICO ALCAMPO Jamón serrano cortado en lonchas 250 g.	250 g	3,75	PRODUCTO ECONÓMICO	Refrigerado
	JAMONES ARROYO Jamón serrano cortado en lonchas 250 g.	250 g	3,75	JAMONES ARROYO	Refrigerado
	BOADAS Jamón serrano gran reserva 18 meses 150 g.	150 g	4,50	BOADAS	Refrigerado
Ibérique	MATORRAL Virutas curadas de jamón y paleta (50% cerdo blanco, 50% cerdo ibérico)	150 g	3,55	MATORRAL	Refrigerado
	SÁNCHEZ ALCARAZ Jamón curado en taquitos de jamón ibérico 50 g.	50 g	2,50	SÁNCHEZ ALCARAZ	Refrigerado, sin gluten, sin lactosa
	IBERICO DE BELLOTA Jamón ibérico 100 g.	100 g	5,99	IBERICO DE BELLOTA	Refrigerado
	NAVIDUL Jamón ibérico de bellota cortado en lonchas 80 g.	80 g	6,80	NAVIDUL	Refrigerado
	SÁNCHEZ ALCARAZ Jamón	100 g	5,99	SÁNCHEZ ALCARAZ	Refrigerado

ibérico curado en lonchas 100 g.	150 g	8,99	COVAP	Refrigerado
COVAP Jamón ibérico de bellota 150 g.	150 g	8,99	COVAP	Refrigerado
JAMONES CASTILLA Jamón ibérico curado 250 g.	250 g	14,99	JAMONES CASTILLA	Refrigerado
JAMÓN DE CASTILLA Jamón ibérico curado 200 g.	200 g	12,50	JAMÓN DE CASTILLA	Refrigerado
LOS ALTOS Jamón ibérico de bellota 75 g.	75 g	5,49	LOS ALTOS	Refrigerado
PEÑAS DEL REY Jamón ibérico cortado en lonchas 100 g.	100 g	7,50	PEÑAS DEL REY	Refrigerado

Source : [[Alcampo](#)]

Enfin, le dernier tableau met en exergue les meilleurs jambons ibérique de l'année 2023 :

Produit	Origine	Prix	Poids	Temps de curation	Type de Ganadería	Caractéristiques supplémentaires
Jamón de Bellota 100% Ibérico RR	Sierra del Norte de Séville	336 €	8-8.5 kg	40 mois	Extensiva	Artisanat, alimentation aux bellotas et pastos naturels, production durable et éthique.
Jamón de Bellota 100% Ibérico Aljamar	Guijuelo, Salamanca	499 €	8 kg	36 mois	Extensiva	Meilleur jamón ibérico, production durable et traditionnelle, élevage en liberté.
Jamón Joselito Vintage 2015	Guijuelo, Salamanca	1.600€	9-10 kg	Plus de 7 ans	Extensiva	Produit de luxe, élevé en liberté, alimenté aux bellotas, maturation longue.
Jamón Bellota 100% Ibérico Fisan	Campillo de Salvatierra, Salamanca	575 €	7.5-8 kg	50 mois	Extensiva	Haut de gamme, production traditionnelle, maturation de 50 mois.
Jamón de Bellota 100% Ibérico Cinco Jotas	Jabugo, Huelva	800 €	7-8 kg	48 mois	Extensiva	Jambon très prestigieux, maturation lente, porcs nourris exclusivement de bellotas.
Jamón de Bellota 100% Ibérico 5 Jotas Gran Reserva	Jabugo, Huelva	1.200€	7.5-8 kg	60 mois	Extensiva	Ultra-prémium, seul le meilleur lot est sélectionné pour cette édition, maturation très longue.
Jamón Ibérico de Cebo Joselito	Guijuelo, Salamanca	220 €	8-8.5 kg	24 mois	Cebo	Cebo, porc nourri aux céréales et autres aliments naturels, produit au bon rapport qualité-prix.
Jamón Ibérico de Bellota 100% Ibérico Dehesa de Extremadura	Dehesa de Extremadura	540 €	7.5-8 kg	48 mois	Extensiva	Alimentation à base de bellotas dans les vastes pâturages d'Extremadura, maturation longue.

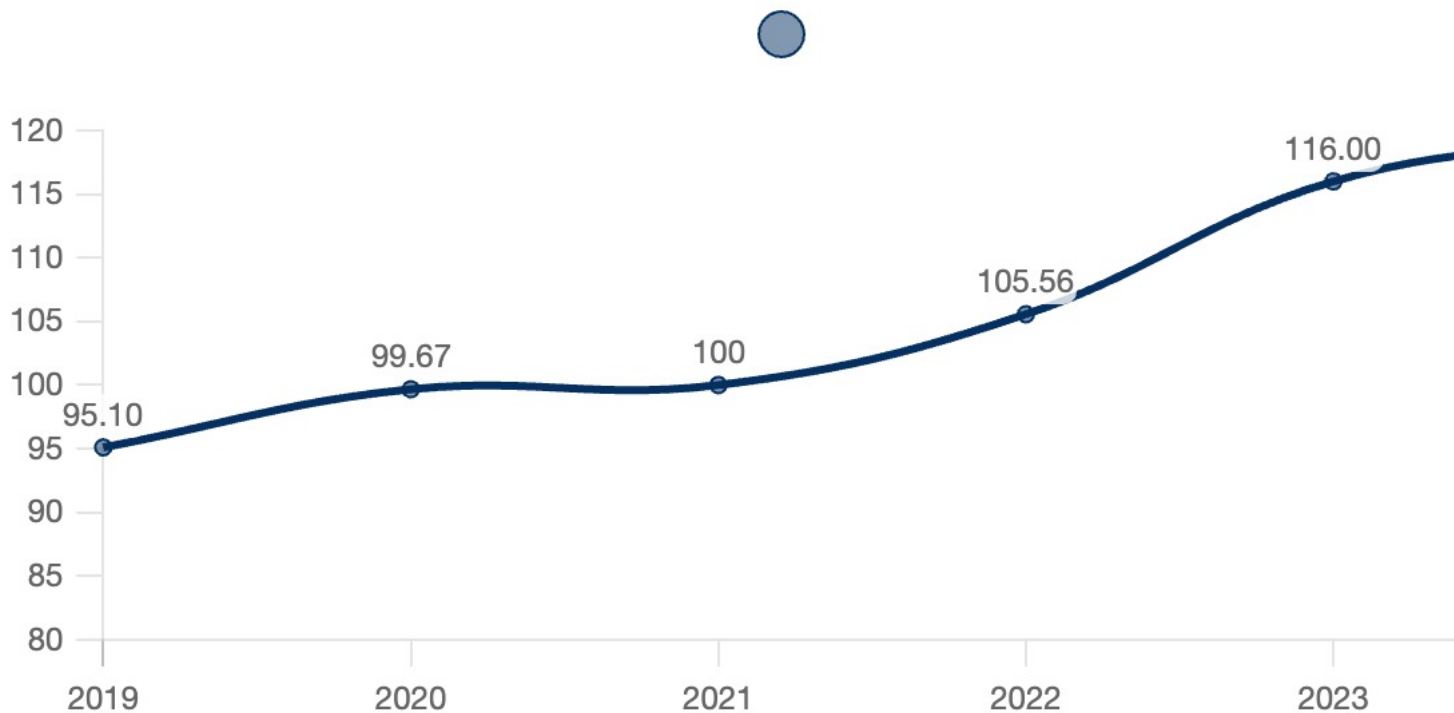
Source : [[RRibéricos](#)]

Offer analysis

4.4 Price trends

The price index for the "Dry, salted or smoked meat" category in Spain, with a base of 100 in 2021, shows a significant change between 2019 and June 2024. In 2019, the index stood at 95.10, reflecting lower price levels than in 2021. In 2020, it reached 99.67, a slight pre-pandemic increase. In 2021, the index stabilized at 100, serving as a benchmark for subsequent comparisons. **A notable rise was recorded in 2022, with an index of 105.56, reflecting an increase in prices, due to tensions on the raw materials markets. In 2023, this upward trend accelerated, with the index reaching 116.00.** Finally, in June 2024, the index continued to rise, reaching 119.59, underlining the continuing rise in prices for this meat category in Spain, and therefore also for ham.

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Source : [INE](#)

Offer analysis

4.5 Supply trends: moving upmarket

Upmarket Iberian ham: a driving force for gastronomic excellence

Iberian ham occupies an increasingly prestigious position on international markets, marking a clear trend towards upmarket status. This product, emblematic of Spanish gastronomic culture, is today considered a culinary treasure, thanks to its artisanal production process and exceptional quality. Recent data on the sector's exports confirm this trend towards greater value.

- **An increase in volume and value:**

According to figures from the Consorcio del Jamón Serrano Español, exports of Spanish cured ham reached **59,850 tonnes in 2023**, an increase of **4.95%** on the previous year. At the same time, the value of exports rose by **10.80%**, generating revenues of over **€657 million**. These figures testify not only to growing international demand, but also to the appeal of high-quality products, often positioned in premium ranges.

- **Market diversification:**

Traditionally consumed in Europe, Iberian ham is growing in popularity in emerging markets such as Brazil, Chile and Norway. These regions are showing a growing interest in exceptional products, reinforcing the geographical diversification of exports. This phenomenon illustrates the worldwide recognition of the quality of Iberian ham and its status as a luxury product.

- **A commitment to quality:**

Iberian ham's move upmarket is underpinned by ongoing efforts to improve quality and sustainability. Producers adopt environmentally-friendly farming practices and implement packaging innovations to preserve the product's unique characteristics. This approach guarantees the sustainability of the industry while meeting the expectations of modern consumers.

- **Iberian ham in haute cuisine:**

This move upmarket is also reflected in its use in haute cuisine. Chefs the world over are incorporating Iberian ham into sophisticated dishes, positioning it as a central ingredient in their culinary creations. Whether combined with truffles, served in carpaccio or integrated into fusion dishes, Iberian ham embodies gastronomic refinement and innovation.

- **A forward-looking strategy:**

The sector not only maintains its current standards, but also aims to respond to changing food trends. Product diversification, such as ready-to-eat tapas or formats adapted to an international audience, is helping to broaden the audience while reinforcing the premium position of Iberian ham.

In short, the move upmarket for Iberian ham reflects an ambitious strategy combining tradition, innovation and excellence. This commitment to quality and sustainability consolidates its position as an emblematic product of Spanish gastronomy, and a true symbol of luxury the world over.

Sources : [[AgroNews Castilla Y León](#), [La victoria](#)]

Offer analysis

4.6 Some industry headwinds

Fernando Santos, Purchasing Manager at **Julián Martín**, describes in his article the difficulties faced by the **jamón ibérico** industry in Spain, despite the high recognition it has achieved both at home and abroad. The sector, whose origins date back to the 1930s-1940s, has evolved over the years, but the entry of new players from the **white pork** sector is beginning to transform the landscape.

- **Business profitability and rising costs:**

One of today's key challenges is to **maintain business profitability** despite **rising costs**. In 2022 and 2023, prices for **supplies** and **wages** in factories have risen considerably, affecting the entire production chain. For example, rising **grain** prices are affecting both livestock farmers and meat processors, as are rising costs for other supplies such as **energy**.

In addition, **financing costs** have reached historic levels due to rising interest rates. As a result, expenses have risen by **more than 10%** on an annual basis, further exacerbating the situation. According to **Spain's National Association of Meat Industries (Anice)**, the meat industry and the agri-food sector in general are in a critical situation. Although producers and processors have absorbed the increased costs, they cannot pass them on in product prices, as consumers may find it difficult to accept them, given the **fierce competition on the market**.

- **Reducing Bellota Production:**

Another major challenge is the impact of **climatic conditions** on **bellota** (acorn) production. With rising **temperatures** and **longer summers**, **bellota production** has fallen over the last montaneras (pig feeding period) by **20% to 25%**. This has led to a reduction in the number of **bellota pig sacrifices**, which in turn has reduced the **availability of jamón ibérico** in the drying sheds.

- **Consumer awareness of Quality:**

The third challenge relates to **educating consumers**, both in Spain and internationally, about the **artisanal process** and quality of **jamón ibérico**. Despite its reputation, many consumers do not fully understand the product's **characteristics** and the **importance** of its traditional production process. It is essential to **educate** the market about the different stages of production, from pig rearing to **curing** in the drying sheds, so that consumers can fully appreciate the superior quality of **jamón ibérico**.

Source : [Eurocarne](#)

Regulations

5.1 European regulations

Spanish and **European regulations** concerning **ham**, in particular **jamón ibérico** and other meat-based products, are based on several pieces of legislation that govern production, processing, quality and marketing practices. Here's an overview of the main laws and regulations:

- **Regulation (EU) No. 1151/2012 of the European Parliament and of the Council of November 21, 2012**

- **Purpose:** This regulation establishes **quality systems** for agricultural and food products. It concerns **Protected Geographical Indications (PGI)**, **Protected Designation of Origin (PDO)**, and **Traditional Speciality Guaranteed (TSG)**.
- **Impact on ham:** **Jamón ibérico** can be protected by a **Protected Denomination of Origin (PDO)**, guaranteeing its geographical origin and traditional production methods.

Relevant article:

- **Article 93:** Conditions for registration of a protected denomination (PDO/PGI).
- **Article 94:** Detailed quality criteria for products covered by a PGI or PDO.

- **Regulation (EC) n° 853/2004 of the European Parliament and of the Council of April 29, 2004**

- **Purpose:** This regulation lays down **hygiene rules** applicable to foodstuffs, including meat products.
- **Impact on ham:** It imposes strict sanitary conditions for the manufacture, storage and marketing of meat products, including ham, to guarantee food safety.

Relevant article:

- **Article 3:** Hygiene requirements for products of animal origin.
- **Annex III, Chapter V:** Specific requirements for meat products, including dry products such as ham.

- **Regulation (EC) No 1332/2008 of the European Parliament and of the Council of December 16, 2008**

- **Purpose:** This regulation regulates the use of **food additives**, including in meat products, to ensure that no harmful additives are used.
- **Impact on ham:** It limits the types of additives that can be used in ham production, particularly for **cured hams**.

Relevant article:

- **Article 5:** Lists of authorized food additives and conditions of use.

Regulations

5.2 Iberian ham

[Real Decreto 4/2014](#) establishes quality standards for the production, marketing and labeling of Iberian ham, paleta (shoulder) and lomo (tenderloin). It replaces and updates the provisions of **Real Decreto 1469/2007**, introducing more precise standards to guarantee product traceability and quality. Here are the key points, enriched with new information:

- **Product classification**

Products are categorized according to two main criteria:

1. **Raciality:**

- "100% Iberian": animals from purebred Iberian parents only.
- "Iberian": crossbreeding with other breeds, but with a minimum of 50% Iberian genetics.

2. **Feed:**

- **De bellota:** pigs fed exclusively on acorns and pasture.

- **De cebo de campo:** pigs raised in semi-freedom on mixed feed.
 - **De cebo:** pigs raised indoors on a cereal- and forage-based diet.
3. **Each category has a mandatory color code for easy identification:**

- **Black:** 100% Iberian bellota.
- **Red:** Iberian bellota.
- **Green:** Iberian cebo de campo.
- **White:** Iberico de cebo.

- **Traceability and control**

Products must be tracked at every stage of the chain, from breeding to marketing. This includes :

- Identification of pigs in the genealogical register.
- Certification by independent bodies.
- Use of **tamper-proof seals** for maturing parts.

- **Production conditions**

- **dehesa rearing:** Pigs destined for the "de bellota" category must be free-range in specifically registered pastures (SIGPAC).
- **Minimum maturation:**
 - **Ham:** minimum 24 months for pieces weighing over 7 kg.
 - **Paleta:** minimum 12 months.
- **Density and feed:** Farming practices must guarantee animal welfare and preserve the ecosystem.

- **labeling and transparency**

Each product must clearly indicate :

- Racial purity.
- Type of feed.
- Geographical origin (in the case of protected designation products such as DOP Jabugo or Guijuelo). Terms such as "**pata negra**" are reserved exclusively for 100% Iberian bellota products.

- **Control and certification**

Independent bodies carry out **regular audits** to verify product conformity. Producers must implement self-monitoring systems to ensure compliance with standards.

Regulations

5.3 Protected Designations of Origin

The 4 Protected Designations of Origin for Jamón Ibérico

Jamón Ibérico is one of the most emblematic products of Spanish gastronomy. Its production is distinguished by unique craftsmanship, and Spain, renowned for its Iberian pig breeds and magnificent dehesas, is proud of the quality of this product. To guarantee this quality, four Protected Designations of Origin (PDOs) for jamón ibérico have been created. These certifications regulate and ensure the quality of Iberian products. The four main PDOs for jamón ibérico in Spain are : Dehesa de Extremadura, Jabugo, Guijuelo, and Los Pedroches.

- **Jamón Ibérico DOP Dehesa de Extremadura :**

The **DOP Dehesa de Extremadura** is one of the oldest and most rigorous in Spain. Created in 1990, this PDO is a guarantee of superior quality for Iberian products produced in the Extremadura region, an area renowned for its biodiversity and unspoilt nature. This region, with over a million hectares of dehesas, allows Iberian pigs to live in freedom, fed mainly on bellotas (acorns) and natural pastures. The region's extreme climate, with cold winters and hot summers, gives jamón its unique flavors and aromas.

Products from this DOP undergo strict controls throughout the production process, from ageing to maturing. Maturation time varies from 2 years for paletas to 3 to 4 years for hams, a lengthy process that results in rich, complex flavors. Jamón ibérico Dehesa de Extremadura is one of the most highly prized for its quality and distinctive taste.

- **Jamón Ibérico DOP Guijuelo:**

DOP Guijuelo, founded in 1984, is the oldest PDO for jamón ibérico. It comes from the Guijuelo region, in the province of Salamanca, in the heart of Spain. This region enjoys a special climate, with cold, windy winters and mild summers. This climate allows optimum fat infiltration into the ham, creating a marbled texture and a soft, melt-in-the-mouth flavor. The special feature of this region is the high altitude of its dehesas, allowing the pigs to thrive in ideal conditions.

This ham also takes longer to mature, guaranteeing finer aromas and a delicate texture. Jamón ibérico de Guijuelo is distinguished by its deep red color and pearly fat marbling, which develops as a result of the local climate.

- **Jamón Ibérico DOP Jabugo:**

The **DOP Jabugo** is one of the most prestigious and internationally recognized. It comes from the Jabugo region, in the province of Huelva, Andalusia. What makes this region so special is its centuries-old tradition of jamón ibérico production, and the ideal climatic conditions for perfect ripening. The dry climate and the mountains of the Sierra de Aracena allow for optimal dehydration of the ham, while promoting greater infiltration of fat into the muscle.

Jamón ibérico de Jabugo is renowned for its superior quality, achieved by rearing pigs in dehesas fed mainly with bellotas, giving the product a richness of flavor. Maturation time is generally around 4 years, allowing the ham to develop deep, complex aromas.

- **Jamón Ibérico DOP Los Pedroches:**

DOP Los Pedroches is located in the Córdoba region, in the heart of the Sierra de Los Pedroches mountain range. This relatively recent appellation has quickly become synonymous with quality. It benefits from climatic conditions that are ideal for rearing Iberian pigs: cold winters and moderate summers, as well as vast, verdant dehesas. The pigs are fed mainly with bellotas, giving them a particularly tasty meat.

Jamón de Los Pedroches is distinguished by its mild, delicate flavor, fruity aroma and tender texture. This Iberian ham is often appreciated for its balance between quality and price.

Conclusion:

Denominaciones de Origen (PDOs) for jamón ibérico are essential to guarantee the authenticity and quality of this emblematic product. Thanks to these certifications, consumers can be sure of the provenance and quality of the products they buy. Each region, with its geographical and climatic characteristics, gives jamón ibérico a unique personality, making every bite an unforgettable taste experience.

Source :[\[Productos delencinar\]](#)

Positioning the players

6.1 Segmentation

Type of player	Companies	Sales (2022)
Industrial producers	Industrias Carnicas Loriente Piqueras	1.036 billion € sales
	Campofrio Food Group Sa	1.023 billion € sales
	ElPozo Alimentación	€1.662 billion
	Bernardo Hernandez Sl	31.124 million euros
	Jamones Y Embutidos Jaem Sa	35.546 million euros
	Cesar Nieto Group Sl	€ 23.664 million
Artisanal producers	La Jabugueña	/
	Nobleza Ibérica	/
	7 bellotas SL	/
	Jamones Villarroya S.L	/
	Simon Martin Guijuelo Sl	/
	Utrilla Mateo Maria Begoña	/
	Jamones Eiriz	/

Entreprises

Cesar Nieto Group Sl

<https://www.cesarnieto.com/>

SIREN:

Chiffres d'affaires: 23.664 millions € (2022)

Description:

César Nieto is a Spanish family business specializing in the production of high-quality Iberian hams and cured meats. Founded in **1895**, it is built on more than five generations of tradition, combining craftsmanship with a commitment to sustainability. Located in Guijuelo, a region famous for its Iberian products, César Nieto is synonymous with quality, authenticity and respect for origins.

Origins and heritage

- **Founded in 1895:** Ildefonso Nieto, a pioneer in the Iberian pork industry, was one of the first livestock traders in the Guijuelo region.
- **Family transmission:** For over 125 years, the company has been perpetuating the essence of the traditional Iberian product with a protected designation of origin.
- **La Dehesa:** The pigs are raised outdoors in the *dehesas*, where their natural acorn-based diet directly influences the unique quality and flavors of the products.

Products

1. Iberian Hams:

- Jamón Ibérico Bellota (100% Iberian, acorn-fed).
- Jamón Ibérico Cebo.

2. Paletas (Iberian shoulders):

- Bellota and Cebo de Campo.

3. Cured meats:

- Chorizo, salchichón and lomo de Bellota.

4. Sliced products:

- Loncheados packaged for convenience.

5. Gifts:

- Gourmet boxes for special occasions.

6. Iberian meat:

- Fresh cuts for gourmet cooking.

Key commitments

1. Quality and Authenticity:

- Products complying with the Guijuelo Protected Designation of Origin (PDO), guaranteeing the origin and purity of the Iberian breed.

2. Sustainability:

- Commitment to strict environmental policies to preserve local ecosystems.

3. Craftsmanship and Tradition:

- Production processes respectful of artisanal methods, guaranteeing exceptional quality.

News and Communication

- Participation in gastronomic fairs to promote Iberian culture.
- Collaboration with influencers and chefs to promote César Nieto products.
- Development of a digital presence with an online store and active communication on social networks.

Structure and presence

- **Head office:** Polígono alimentario 13, 37770 Guijuelo, Salamanca, Spain.
- **Contact:**
 - Telephone: +34 923 58 04 47
 - Email: tienda@cesarnieto.com
- **Opening hours:** Monday to Friday, 7:00 a.m. to 6:00 p.m.

Sustainability and Vision

César Nieto is committed to sustainable production, combining respect for the environment, innovation and tradition. Their model reflects the balance between the modern needs of consumers and the preservation of ancestral practices.

Distribution channels

- **Online store:** Direct sales to consumers.
- **Social networks:** Presence on Instagram, Facebook, YouTube and LinkedIn.
- **Export:** Presence in international markets thanks to the quality of our products.

César Nieto embodies the excellence of Iberian products, combining age-old family know-how with a passion for the authentic flavors of Guijuelo. A benchmark for lovers of exceptional hams and cured meats.

Données liées au SIREN:

SIREN:

Enterprises

Montaraz (Jamones Y Embutidos Jaem Sa)

<https://www.montaraz.es/en/home-english/>

SIREN:

Chiffres d'affaires: 35.546 millions € (2022)

Description:

Montaraz is a Spanish family business specializing in the production of high-quality Iberian hams and products. With five generations of experience, Montaraz is renowned for its respect for tradition, its craftsmanship, and its ability to offer unique, 100% natural products, without additives or preservatives. The company stands out for its commitment to quality, sustainability and craftsmanship.

Origin and philosophy

The term *Montaraz* evokes the very essence of the company: a deep respect for nature and the role of the *Dehesa* (Spanish wooded meadow) in the cultivation of the Iberian pig. The pigs feed exclusively on the acorns of oak trees, under the supervision of the **Montaraz**, guardian of tradition and protector of the pastures.

Production process

1. **Iberian pigs:**
 - raised outdoors in the *Dehesa*, a unique ecosystem in Extremadura and Salamanca.
 - Naturally fed, guaranteeing meat of exceptional quality.
2. **Salt and Time:**
 - The only ingredients added to the meat are sea salt and time, respecting a slow maturation method to preserve authentic flavors.
3. **Two Places of Refinement:**
 - **Salamanca:** Refinement in a mild climate for delicate, subtle hams.
 - **Extremadura:** Refinement in a warm climate for more intense, complex products.

Products

Montaraz offers a varied range of products, including:

- **Iberian Hams:**
 - Jamón de Bellota 100% Iberico "Pata Negra".
 - Paletas (shoulders) de Bellota.
- **Iberian cold cuts:**
 - Lomo, chorizo, salchichón.
- **Sliced products:**
 - Machine or knife sliced for perfect packaging.
- **ecological Editions:**
 - Guaranteed preservative-free products from pigs raised according to sustainable practices.

Key commitments

1. **Craftsmanship and Tradition:** Maintaining techniques handed down through five generations.
2. **Sustainability:** Preservation of the *Dehesa*, an essential habitat for Iberian pigs and a unique ecosystem.
3. **Global Quality:** Montaraz is present on the tables of Michelin-starred restaurants and in delicatessens in the world's major capitals.

International presence

- Exports to Europe, Asia, America and the Middle East.
- Two USDA-approved natural drying units in Salamanca and Extremadura.
- Offices and warehouses in New York and Miami to reinforce international distribution.

Heritage and reputation

Montaraz has been acclaimed by prestigious publications such as *Forbes* and *Expansión*, and continues to be a global ambassador for Iberian gastronomy. Its ham has won awards for its exceptional quality, and is appreciated by chefs and gourmets the world over.

Données liées au SIREN:

SIREN:

Entreprises

Beher (Bernardo Hernandez Sl)

https://beher.com/?srsId=AfmBOoqGRLe964D5Mq_XoLYslul98XDZ1m1g68O15ZBZ3r05xg-aXnlM

SIREN:

Chiffres d'affaires: 31.124 millions € (2022)

Description:

BEHER, an acronym for Bernardo Hernández, is a Spanish company renowned for the production of 100% Iberian hams and cured meats. Based in Guijuelo, Salamanca, this family-run business, with four generations of experience, is a symbol of tradition and excellence in Iberian products. BEHER controls the entire production process, from breeding to marketing, guaranteeing some of the highest quality standards on the market.

Main characteristics :

- **Flagship product:** Iberian "Pata Negra" hams recognized for their genetic purity and superior quality.
- **Ecological range:** Products produced without preservatives, using slow, low-temperature curing processes.
- **International recognition:** BEHER regularly wins awards at gastronomic trade fairs for the excellence of its products.
- **Sustainable approach:** The company is committed to environmentally-friendly practices and values sustainable agriculture.

History :

- **Family origins:** Founded in Guijuelo, the cradle of Iberian charcuterie, BEHER was born from the passion and know-how of the Hernández family.
- **Internationalization:** Thanks to its excellence, BEHER has expanded its presence worldwide, taking part in trade fairs such as **Salón Gourmet**.
- **European support:** BEHER has benefited from funding from the Institute for Competitiveness of Castilla y León (ICE) and the European Regional Development Fund (ERDF) for its international expansion.

Products :

1. 100% Iberian hams:

- Jamón de Bellota Oro "Pata Negra".
- Jamón Bernardo Selección.
- Iberian paletas (shoulders) from pigs fed exclusively on acorns.

2. Iberian charcuterie:

- Lomo de Bellota (tenderloin).
- Chorizo Cular and Salchichón de Bellota.
- Iberian panceta.

3. Ecological products:

- made from natural ingredients, without chemical additives.

4. Cutting services:

- Machine- or knife-cut into thin slices for 100 g packs.

Highlights :

1. **360° Production Cycle:** BEHER ensures total control, from the rearing of Iberian pigs in a natural environment to product distribution.
2. **Genetic purity:** All products are derived from 100% Iberian pigs, an essential quality criterion.
3. **Cultural Recognition:** BEHER's 100% Iberian cooked ham is famous, having been appreciated by Pope Francis among others.

Commitment and Sustainability:

- **Artisanal process:** Slow, natural curing to preserve organoleptic qualities.
- **Social responsibility:** Support for the local economy and rural traditions of the Salamanca region.
- **Sustainable expansion:** BEHER invests in the distribution of its products while respecting ecological standards.

Awards :

- [Numerous awards for our hams at international trade fairs.](#)
- Participation in major gastronomic events such as the **Salón Gourmet**.

Données liées au SIREN:

SIREN:

Entreprises

ElPozo Alimentación

<https://www.elpozo.com/>

SIREN:

Chiffres d'affaires: 1.662 milliards € (2022)

Description:

General description

ElPozo Alimentación is one of Spain's favorite household brands, with a presence in 80 countries. Founded over 70 years ago, the company is a pioneer in the field of healthy food, specializing in fresh meats and processed products. Its philosophy is based on continuous improvement, underpinned by investment in research and development to create balanced, nutritious and convenient foods that offer pleasure and well-being.

Key commitments

- Gluten-free:** All ElPozo products are guaranteed gluten-free, certified by the Federación de Asociaciones de Celíacos de España, and suitable for people with celiac disease.
- Circular Integration Model (CIP):** ElPozo controls the entire production chain, from choice of raw materials to delivery, guaranteeing total traceability and optimum quality.
- Innovation and R&D:** Constant investment in research to develop products that meet the needs of modern consumers.

History

- 1954:** Company founded in Alhama de Murcia, Spain.
- 2000s:** International expansion, with products sold in over 80 countries.
- Today:** Recognized for its high standards of quality and food safety, ElPozo is a key player in the agri-food sector.

Products and Brands

ElPozo offers a wide range of products:

- Fresh meats:** pork, turkey, chicken, veal.
- Processed products:** Cooked hams, chorizo, sausages, mortadella.
- Premium products:** Under the **Legado Ibérico** brand, including high-quality Iberian hams.
- ExtraTiernos range:** Tender, flavorful meats.
- Vegetarian and alternative recipes:** In line with new food trends.

Commitment to Sustainability and CSR

- Social responsibility:** Support for solidarity initiatives such as the "Generación Silenciada" campaign against age discrimination.
- Environment:** Implementing strict environmental policies to minimize ecological impact.
- Community:** Active contribution to local communities, notably through partnerships with cultural and sports organizations.

Recent successes

- Sponsorship:** Legado Ibérico, ElPozo's premium brand, is an official sponsor of the **Premios Feroz 2025**, consolidating its position as a premium brand.
- Ambassadors:** Collaboration with personalities such as best-selling author Javier Castillo to reinforce the brand's image.

Recipes and inspiration

ElPozo provides creative recipe ideas for every moment of the day, such as :

- Costillar ExtraTierno with barbecue sauce.
- Marinated pork tenderloin sandwich.
- Arroz con Jamón ExtraTierno.

Données liées au SIREN:

SIREN:

Entreprises

Campofrio Food Group Sa

<https://www.campofrio.es/>

SIREN:

Chiffres d'affaires: 1.023 milliards € (2022)

Description:

General description

Campofrio is one of Spain's most emblematic food companies, specializing in the production and marketing of charcuterie, hams, ready-made meals, pizzas, snacks and vegetarian products. Founded in 1952, the company has established itself as a major player in the Spanish and international markets thanks to its constant innovation and commitment to sustainability.

Vision and Mission

Campofrío embodies the philosophy of "knowing how to enjoy" by offering a varied range of products suitable for every occasion, from family breakfasts to dinners with friends. Their mission is to combine gustatory pleasure and well-being through a balanced diet.

History

- **1952:** Founded in Burgos, Spain. Campofrío begins by producing traditional charcuterie.
- **2000s:** The company goes international and expands its product range.
- **2014:** Integrated into the Sigma Alimentos group, a world leader in the agri-food sector.
- **Today:** Campofrío continues to grow, combining tradition and innovation, with a strong focus on sustainability.

Products

Campofrío offers a complete range of products under several brands:

1. **Campofrío:** Classic cured meats and hams.
2. **Pavofrío:** Light turkey-based products.
3. **Cuida-T+:** A range focused on well-being and health.
4. **Finísimas:** Thin slices for a refined taste.
5. **Vegalia:** Vegetarian alternatives.
6. **Snack'IN:** Practical snacks for all occasions.
7. **Pizza & Salsa:** Pizzas for quick, gourmet meals.

Commitment to sustainability

Campofrío places sustainability at the heart of its growth model. Key initiatives include:

- **Respect for the environment:** Reducing our carbon footprint and managing resources responsibly.
- **Social responsibility:** Commitment to local communities and the creation of an inclusive working environment.
- **Sustainable innovation:** Developing products that meet modern nutritional needs while respecting ethical practices.

Innovation

Innovation is a key driver for Campofrío, which is constantly developing new products adapted to consumer needs:

- Development of vegetarian recipes with the **Vegalia** range.
- Nutritional improvement of traditional products.
- Application of the latest technologies to guarantee quality and food safety.

Facilities and Impact

- **Modern production centers:** located in several regions of Spain.
- **Part of the Sigma Alimentos group:** Strengthening its global presence.
- **Economic impact:** Job creation and collaboration with local partners.

Données liées au SIREN:

SIREN:

Entreprises

Incarlopsa (Industrias Carnicas Loriente Piqueras)

<https://incarlopsa.es/>

SIREN:

Chiffres d'affaires: 1.036 milliards (2022)

Description:

General Description:

Incarlopsa (Industrias Carnicas Loriente Piqueras S.A.) is a leading Spanish producer of pork products, including fresh meats, Iberian products and cured hams. Founded over 40 years ago by the Loriente Piqueras family, the company stands out for its commitment to quality, innovation and sustainability. It is one of the main suppliers to Mercadona, the Spanish supermarket giant.

History:

Founded in the 1980s, Incarlopsa was born of the Loriente Piqueras family's passion and know-how for quality pork products. From modest beginnings, the company has invested in cutting-edge technology and expanded its capacity to 11 production plants. Today, Incarlopsa is internationally recognized for its high standards of traceability, animal welfare and sustainability.

Strategic pillars :

- **Family business:** The company remains true to its family roots, focusing its efforts on satisfying Spanish families through quality food.
- **Innovation and Technology:** Incarlopsa continually invests in innovation and safety, using state-of-the-art equipment to guarantee the quality and traceability of its products.
- **Animal Welfare:** The company applies strict animal welfare standards, certified by the Welfare Quality label, and emphasizes natural feeding for its animals.
- **Sustainability and Social Responsibility:** Incarlopsa is committed to generating value for society by creating sustainable jobs, respecting the environment and supporting rural communities.

Products and Brands:

Incarlopsa offers a wide range of products under different brands:

- Incarlopsa: Main brand for pork products.
- SierraMon and Felix Murtiga: Specialized in dry-cured hams and traditional products.
- NOIR and Terra Dómine: Premium ranges.
- Herencia Noble: High-end Iberian products.

Commitment to Sustainability:

In its 2023 Sustainability Report, Incarlopsa highlights initiatives to reduce the environmental footprint, such as improved energy processes, responsible resource management and support for local communities.

Facilities:

With 11 production plants, Incarlopsa combines traditional expertise and technological innovation to guarantee high standards at every stage of production.

Données liées au SIREN:

SIREN:

Entreprises



La Maison du Jambon de Bayonne

<https://www.maison-du-jambon-de-bayonne.com/>

SIREN: 434702478

Chiffres d'affaires: non renseigné

Description:

La Maison du Jambon de Bayonne is a gourmet store located in Arzacq, in the heart of the Adour Basin.

Open since January 2001, their range of exceptional products is based on recognized traditional know-how. They offer a variety of fine charcuterie, including their famous Bayonne ham, dry cured and cooked meats, cuts and ready-made meals.

40 employees

Données liées au SIREN:

SIREN: 434702478

Entreprises

Grandi Salumifici Italiani®

Grandi Salumifici Italiani

<https://www.grandisalumificiitaliani.it/>

SIREN: NA

Chiffres d'affaires: 706 millions (2021)

Description:

Grandi Salumifici Italiani (G.S.I.) is a company owned by the Unibon Spa group. It is based in Modena, and is active in the market for hams, cold cuts and sausages and has a line of fresh ready meals.

Grandi Salumifici Italiani was established as a joint venture in Milan on May 3, 2000, between the Emilia-based cooperative Unibon and South Tyrol-based Senfter.

On Jan. 1, 2001, the brand debuted on the market, and in May 2004 it acquired Gasser Speck S.p.a. of Alto Adige.

On Dec. 3, 2007, Fratelli Parmigiani S.p.a. was acquired and later absorbed.

In January 2009, G.S.I. makes a partnership agreement with Tuscany-based GaiT (Gruppo Alimentare in Toscana), acquiring 60 percent of it, leading to total acquisition in the following years, until total absorption by merger at the end of 2016.

In November 2011, the historic Bologna-based cured meat production company Alcisa S.p.A. was acquired, also finally absorbed by merger at the end of 2016.

Also in 2011, the Frantoio Gentileschi joint venture between GSI and Creta Farms of Greece was unveiled, an experience that ended after only two years.

On January 12, 2018, Senfter Holding Spa sells its 50 percent stake in Grandi Salumifici Italiani Spa to Unibon Spa. Unibon Spa, an industrial holding company that is a member of Lega Coop, thus rises to 100 percent of Grandi Salumifici Spa. In early 2019, Grandi Salumifici Italiani and Parmareggio establish the Bonterre Group.

Données liées au SIREN:

SIREN: NA

Entreprises



GESCO - Amadori

<https://www.amadori.it/contatti>

SIREN: NA

Chiffres d'affaires: 2.2 milliards € (2022)

Description:

Amadori is a leading Italian agrifood company, with a history that began in Romagna in the 1930s. Over the decades, it has experienced steady growth, transforming itself into a leading player in the Italian agrifood scene. In the 1950s, the Amadori brothers decided to devote themselves to animal husbandry, embarking on a path of entrepreneurship and innovation that has led the company to become a leader in its sector, while maintaining a strong passion inspired by the founders' territory of origin, Romagna.

Sources Externes et Actualités:

Year	Turnover
2022	€ 2.233.323.588
2021	€ 1.749.047.477
2020	€ 1.561.225.300

Données liées au SIREN:

SIREN: NA

Entreprises



Fleury Michon

<https://www.fleurymichon.fr/>

SIREN: 572058329

Chiffres d'affaires: 836.2 millions € (2023)

Description:

Fleury Michon specializes in the processing of pork carcasses into charcuterie preparations, as well as other agri-food transformations. The group generates 84.8% of its sales via self-service supermarkets in France.

It is also working on repositioning its offering with Manger Mieux charcuterie (organic, J'aime, reduced salt content, etc.). Fleury Michon has also launched its vegetable range with this in mind.

The company has been listed on the stock exchange since 2000, and is owned by Société Holding de Contrôle et de Participations (46%) and the Gonnord family (12%). Since 2012, the company has been producing top-quality hams in its new production plant. It is pursuing its international expansion strategy with the acquisition of Fesco, an Italian company, in 2011.

Sources Externes et Actualités:



[Fleury Michon, the king of ham, bets on vegetables with vegetable slices](#) 28/03/2024

- Fleury Michon sales: 795 million euros.
- Products offered: three legume-based products (coral lentils, chickpeas, white beans)
- Target market: 50% of consumers in France claim to be flexitarians.
- Annual decline in the pork ham market: 2% to 3% in volume since 2015

- Estimated supermarket delicatessen market for plant-based products: close to 150 million euros, up by around 3% in volume.
- fleury Michon's "nitrite-free" market share: 62% of sales.



[Fleury Michon maintains volumes despite inflation | Fleury Michon remains competitive.](#) 14/04/2023

- Family-owned group
- Fleury Michon sales in 2022: 795 million euros (up 12.6%).
- Growth in in-flight catering: +67.5%.
- Growth in corporate meal delivery: +58%.
- Retail share of Fleury Michon sales: 85%.
- Growth in mass-market sales: +7.5%.
- Price increase introduced in July: 4% full-year.
- Increase in raw material and packaging costs: 20%.
- Company net income in 2022: 2.4 million euros (versus 4 million the previous year).
- Closure of the Plélan-le-Grand site in Brittany at the end of April, employing 101 people.
- Share of nitrite-free charcuterie ranges in value sales: 33%.

Données liées au SIREN:

SIREN: 572058329

Dénomination: FLEURY MICHON

Adresse: RTE DE LA GARE , 85700 POUZAUGES

Nombre d'employés: **Entre 200 et 249 salariés (2019)**

Capital social: 13 382 659

Données financières:

Année	CA	Résultat net	Clôture exercice	Durée exercice
2020	39 783 084 EUR	-56 260 072 EUR	31/12/2020	12
2019	38 323 270 EUR	-19 491 443 EUR	31/12/2019	12
2018	38 385 246 EUR	16 335 539 EUR	31/12/2018	12
2017	45 542 553 EUR	19 588 251 EUR	31/12/2017	12
2016	41 947 923 EUR	20 370 045 EUR	31/12/2016	12
2015	39 632 425 EUR	26 817 385 EUR	31/12/2015	12

Dirigeants:

Fonction	Prénom	Nom	Age	Compte	Linkedin
Président du conseil d'administration	Grégoire	François Philippe Gonnord	60		
Directeur général	Bechara	SALHA	55		

Entreprises



Herta

<https://www.herta.fr>

SIREN: 311043194

Chiffres d'affaires: 750 millions € (2023)

Description:

Founded in 1897, Herta produces and sells food products such as Knackis sausages, puff pastry and shortcrust pastry, hams, etc. to supermarkets.

Herta is a joint venture owned 40% by Nestlé (Switzerland) and 60% by Casa Tarradellas (Spain). It was originally a Nestlé-owned brand, until the division was sold in December 2019.

Sources Externes et Actualités:



[Herta invests 1.2 million euros to improve its Lozanne site](#) 08/06/2022

- Herta to receive €1.2 million for renovation of its Lozanne logistics platform
- The site has been operational since 2004
- The Lozanne logistics platform employs 66 people
- The site distributes 41,000 tonnes of products a year
- Over the past ten years, business has grown by 30%.
- According to Herta, the installation of adiabatic towers will reduce water consumption by 4,000 M3

Données liées au SIREN:

SIREN: 311043194

Dénomination: HERTA

Adresse: 16 BD MONT D EST IMMEUBLE MAILLE NORD 4, 93160 NOISY-LE-GRAND

Nombre d'employés: **Entre 1 000 et 1 999 salariés (2018)**

Dirigeants:

Fonction	Prénom	Nom	Age	Compte LinkedIn
Directeur général	Arnaud	Hubert Marie Joseph DE BELLOY DE SAINT LIENARD	68	

Entreprises



Auchan groupe

<https://www.auchan.fr/>

SIREN: 831888318

Chiffres d'affaires: 32.9 milliards € (2023)

Description:

Auchan is a supermarket group owned by the Mulliez family since its creation in 1961. The group is present in 14 countries around the world.

january 12, 2021 - Alexandre Mulliez appointed Vice-President of Auchan France - source([Les Echos](#))

- He is the grandson of the group's founder, Gérard Mulliez.
- He is a graduate of EM Lyon
- He has set up 4 start-ups

january 12, 2021 - Auchan changes governance - source([Les Echos](#))

- The Group opts for a more decentralized system. There will now be a Chairman and a Vice-Chairman for each country in which the group operates, working alongside the CEO
- Auchan has sold numerous subsidiaries for a total of 3.250 billion euros. The Italian subsidiary was sold for 1 billion euros to the buyer

january 11, 2021 - Auchan Russia in difficulty - source([Les Echos](#))

- Losses amount to 50 million euros

[Auchan faces another "difficult" year in 2023](#) 22/02/2024

- Auchan net loss in 2023: 379 million euros
- Previous year's profit: 33 million euros
- Auchan's position in the French retail sector: 5th
- Revenue in 2023: down 1.7% to 32.9 billion euros
- Share of hypermarkets in Auchan's store base: 21%
- Acquisition of Casino stores by Auchan and Intermarché: 70 supermarkets, 26 hypermarkets, including five larger than 9,000 m2, and two drives

[Auchan: New Beginnings](#) 06/12/2023

- Gérard Mulliez founded Auchan in 1961.
- Auchan hypermarkets account for 80% of the company's sales.
- Auchan's market share has fallen from over 10% five years ago to 8.4% today.
- Failed attempt by the Mulliez family to take over Carrefour in October 2021.
- Auchan and Intermarché are looking to form a product purchasing alliance, which would give them a combined market share of 30%.
- Auchan and Intermarché have been trying to share nearly 300 hypers and supermarkets that Casino is due to sell.

[Auchan opens its first cashier-free store](#) 29/09/2021

- The chain will detail its plan to roll out Auchan Go stores across the country
- As reported by Libre Service, the first 38-square-meter store in northern France is open 24 hours a day and offers some 500 products to its customers
- All products are weighed and paid for automatically via a mobile app, eliminating the need to wait in line

Données liées au SIREN:SIREN: **831888318**Dénomination: **AUCHAN RETAIL SERVICES**Adresse: **200 RUE DE LA RECHERCHE , 59491 VILLENEUVE-D'ASCQ**Nombre d'employés: **0 salarié (2024)**Capital social: **10 000 000 EUR**

Données financières:

Année	2022	2021	2020	2019	2018	2017
Chiffre d'affaires	491 044 896 505 425 939 529 644 662 468 151 626 323 615 291 30 743					
Marge brute (€)	549 200 764 551 584 691 564 510 890 488 948 461 359 334 299 30 743					
EBITDA - EBE (€)	41 523 509 37 590 472 30 012 138 22 381 036 679 998 -3 914					
Résultat d'exploitation (€)	10 815 268 994 117 -3 094 776 852 444 -3 615 453 -3 914					
Résultat net (€)	7 369 522 -976 699 -3 938 196 -1 589 446 -2 782 752 -3 914 000					
Taux de croissance du chiffre d'affaires (%)	-2,8	-4,6	13,1	44,7	1 052 547,1	-
Taux de marge d'EBITDA (%)	8,5	7,4	5,7	4,8	0,2	-12,7
Taux de marge opérationnelle (%)	2,2	0,2	-0,6	0,2	-1,1	-12,7
BFR (jours de Chiffre d'affaires)	-31,9	-72,5	-62	-65,3	-81,9	-2 164,3
BFR exploitation (jours de chiffre d'affaires)	-41,1	-69,7	-23	-37,7	298,7	372,6
Marge nette (%)	1,5	-0,2	-0,7	-0,3	-0,9	-12,7
Valeur ajoutée / chiffre d'affaires (%)	39,4	38,9	48,6	50,2	39,5	-12,7
company.salaries_and_social_charges	159 703 621 153 464 802 220 059 422 178 784 301 123 971 029 -					
Salaires et charges sociales (€)	32,5	30,4	41,5	38,2	38,3	-

Entreprises



Mercadona

<https://www.mercadona.pt/pt/iniciacao>

SIREN: CIF A46103834

Chiffres d'affaires: 27.82 milliards € (2022)

Description:

Mercadona is a Spanish company operating in the mass retail sector. Its head office is located in the municipality of Tabernes Blanques, in the province of Valencia. In 2020, the company had 1,654 supermarkets, including 1,637 in Spain (with a presence in all 52 provinces, plus Ceuta and Melilla) and 14 in Portugal.

Managed by Juan Roig since 1981, the family business, which had just 8 food stores when it was bought by Juan Roig and his family, is now the market leader in Spain. The recipes for the brand's success are as follows:

- Better-trained, results-driven employees with a wide range of benefits. Sales per employee are almost 20% higher than those of competing Spanish chains.
- Aiming to offer the best possible value for money, with strong development of its private label, some of whose products have become genuine best-sellers.

Note: Mercadona is also known for being the first company to launch a range of gluten-free products. [[Les Echos](#)]

The family business was taken over in 1981 by Juan Roig, his wife and siblings. Juan Roig and his wife became the main shareholders in 1990. [[Les Echos](#)]

Sources Externes et Actualités:

	2017	2018	Comments
Number of stores	1627	1636	29 openings and 20 closures during the year
Millions of euros in sales (incl. VAT)	22 915	24 305	5% on a like-for-like basis
Profit sharing	840	1 213	
- Of which employees (target bonus)	313	325	4%
- Of which taxes	205	295	43%
- Net income	322	593	84%
Purchases in Spain (in millions of euros)	17 533	18 640	6%
Investments	1 008	1 504	50%
Personnel	84 000	85 800	1800 permanent positions

Source: [Mercadona](#)

Données liées au SIREN:

SIREN: CIF A46103834

Adresse: C/valencia, N 5 46016 - (Tavernes Blanques) - Valencia/valència

Nombre d'employés: 85800 ()

Entreprises

7 bellotas

<https://7bellotas.com/en/>

SIREN:

Chiffres d'affaires: non renseigné

Description:

7 Bellotas is a Spanish company based in Salamanca, specializing in the artisanal production of high-quality Iberian hams. The company stands out for its commitment to tradition, sustainability and craftsmanship. Its products, made from acorn-fed Iberian pigs (*bellotas*), embody the excellence of Spanish gastronomy, with incomparable flavor and quality.

Origins and philosophy

- **Artisanal heritage:** 7 Bellotas relies on traditional production methods to guarantee authentic taste and exceptional quality.
- **Location:** The pigs are free-range in the Salamanca region, benefiting from a natural environment ideal for their development.
- **Natural feed:** The pigs are fed exclusively on acorns and herbs, giving the hams a richness of unsaturated fatty acids, similar to those found in olive oil.

Key characteristics

1. Exceptional quality:

- Produced from 100% Iberian or crossbred (50%) pigs, according to strict standards.
- Long, natural curing, using only sea salt to preserve flavor purity.

2. Sustainable craftsmanship:

- Commitment to the environment through nature-friendly practices.
- Absence of chemical preservatives and additives in products.

3. Unique flavors:

- Products are renowned for their refined taste and delicate aromas, appreciated the world over.

Products

1. Iberian Hams:

- **100% Ibérico Bellota:** The top of the range, matured for 36 to 64 months.
- **50% Ibérico Bellota:** A balance between tradition and accessibility.

2. Paletas (shoulders):

- 100% Paleta Bellota and 50% Ibérico.

3. Iberian charcuterie:

- Chorizo, salchichón, lomo (filet mignon) de Bellota.

4. Sliced products:

- Available in vacuum packs for optimum preservation.

5. Accessories:

- Rotating racks and slicing knives for a complete gastronomic experience.

Key commitments

1. Health and Wellness:

- Hams are rich in unsaturated fatty acids, ideal for a balanced diet.

2. Support for local craftsmanship:

- The company values rural traditions and supports the local economy.

3. Quality customer service:

- International delivery and dedicated assistance to meet consumer expectations.

Awards and recognition

- Appreciated for its products in gourmet boutiques and by Michelin-starred chefs.
- High customer rating (4.8/5) based on online store reviews.

International presence

7 Bellotas products are available worldwide through their online store. The company ships its Iberian hams and cured meats in optimized packaging to guarantee freshness and quality.

Données liées au SIREN:

SIREN:

Entreprises

La Jabugueña

<https://www.lajabugueña.com/>

SIREN:

Chiffres d'affaires: non renseigné

Description:

La Jabugueña is a Spanish company renowned for producing 100% natural Iberian bellota hams of exceptional quality. Founded over **50 years ago**, La Jabugueña stands out for its total control of the production chain, from breeding to distribution, while respecting a sustainable, artisanal philosophy.

Origins and commitments

- **Artisanal heritage:** From the outset, La Jabugueña has perpetuated the traditional methods of producing Iberian ham in the Jabugo region, renowned worldwide for its optimal maturing climate.
- **Location:** The pigs are raised in freedom in the **Sierra de Aracena and Picos de Aroche Natural Park (Huelva)**, benefiting from a unique ecosystem where their natural acorn-based diet enriches the quality of the meat.
- **Sustainable commitment:** La Jabugueña invests in sustainable practices, including the installation of photovoltaic panels to reduce its ecological footprint.

Key features

1. Total control of production:

- free-range rearing.
- Artisanal process including sacrificing, curing, maturing, and maturing in Jabugo facilities.

2. 100% natural products:

- No chemical additives or preservatives.
- **Clean Label** range, suitable for consumers seeking allergen-free products.

3. Health and nutrition:

- Rich in **vitamin E** and fatty acids similar to those found in olive oil, making it suitable for a healthy diet, especially for cholesterol control.

Products

• Iberian hams:

- Jamón de Bellota 100% Ibérico.
- Nature range, 100% natural.

• Paletas (shoulders):

- Paleta de Bellota 100% Ibérica.

• Charcuterie:

- By-products such as lomo and chorizo.

• Innovation:

- New products in line with the "Clean Label" trend.

Awards

- **15 medals** at the **IFEA International Quality Competition (Frankfurt)** in 2022.
- **Gold medal for entrepreneurial merit** in 2019, awarded by the Diputación de Huelva.

Community support

- **Sport:** Since its inception, La Jabugueña has supported athletes, including **José Antonio Escuredo**, Olympic cycling medalist in Athens.
- **Awareness:** Promotes the nutritional value of Iberian ham, highlighting its health benefits and its role in a balanced diet.

Environmental commitment

- Recipient of the **European Agricultural Fund for Rural Development** for its sustainability initiatives.
- Installation of solar panels to promote self-consumption and reduce carbon emissions.

Contact

- **Head office:** Los Romeros de Jabugo, S.L., Polígono Alimentario 13, 37770 Guijuelo (Salamanca), Spain.
- **Contact:**
 - Telephone: +34 923 58 04 47
 - Email: tienda@cesarnieto.com
- **Opening hours:** Monday to Friday, 7:00 a.m. to 6:00 p.m.

La Jabugueña embodies artisanal excellence and sustainable commitment, while promoting the Spanish jamón ibérico tradition. It is a key player in the preservation of ecosystems and the promotion of a unique gastronomic product.

Données liées au SIREN:

SIREN:



Businesscoot

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