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The Power of Pulses

**Meat price rises in Spain
have paved the way for the
return of a traditional staple
that's good for health,
wallets, and the planet**

A Spanish Briefing prepared by Madre Brava

The silent gap in protein prices

The price of meat in supermarkets is pulling further and further away from pulses. In the case of beef, the price gap has surged by 48% over the last five years, just as geopolitical tensions trigger fresh alarms over a new wave of food inflation.

Inflation is not neutral. The sustained rise in meat prices hits low-income families hardest. Those who already spend a fifth of their budget on food and have reached their spending limit simply cannot afford to pay more for groceries.

In this scenario, pulses emerge as an economic, healthy, and sustainable refuge. Spain is fortunate to have a gastronomic culture that has always kept them at its heart. Bringing them back would help ensure that eating well becomes the simplest and most affordable option for everyone.

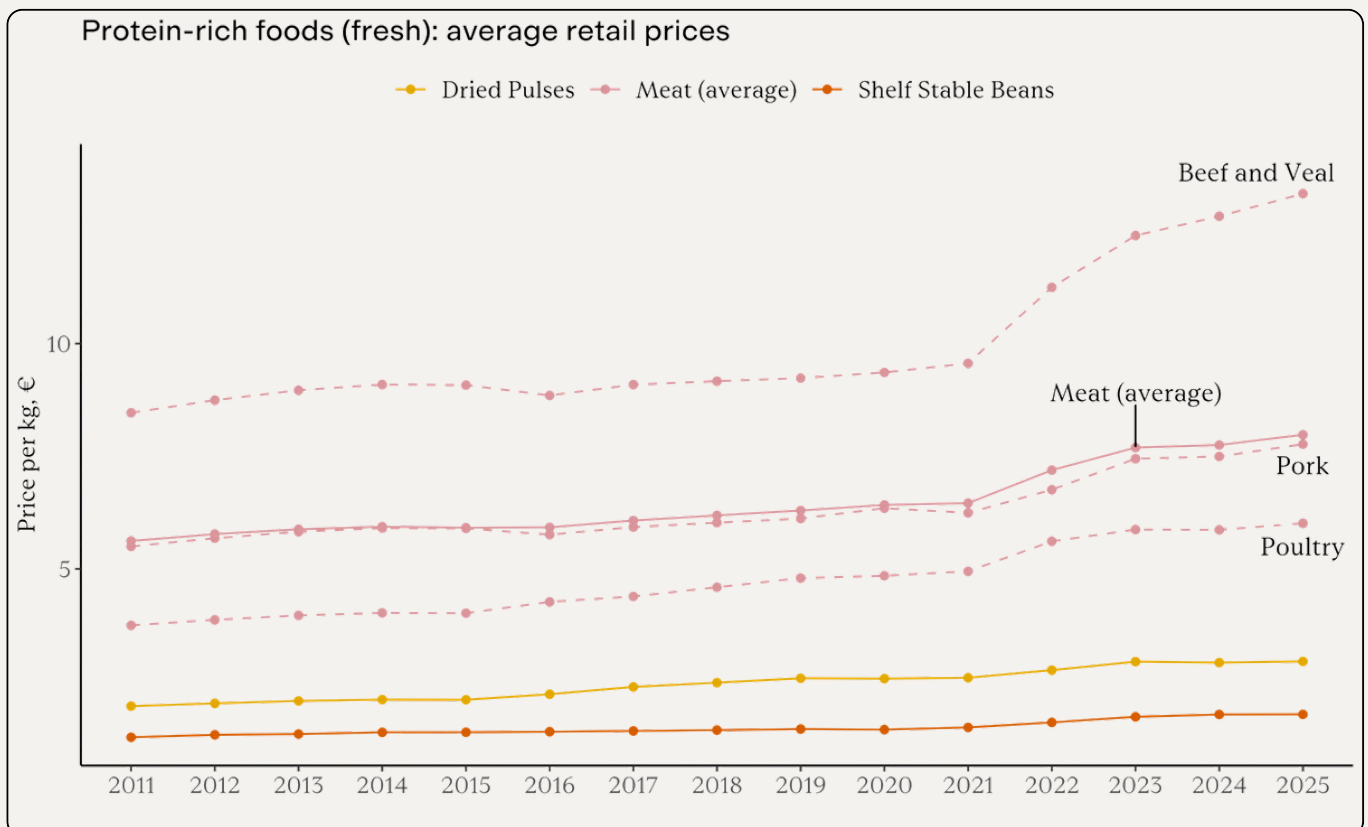
As the architects of our shopping baskets, supermarkets have the power and the responsibility to lead this change and make it easy. Promoting plant-based protein and pulses is an essential step to protect our health, our pockets, and our planet.

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Summary of Findings

Madre Brava has analysed Euromonitor data on protein price trends in Spanish supermarkets. We found:

1. The price of meat continues to rise and the gap with pulses is widening. Pulses have established themselves as one of the most affordable sources of protein in shoppers' baskets.



Source: Euromonitor International, Staple Foods, Industry Edition 2025¹

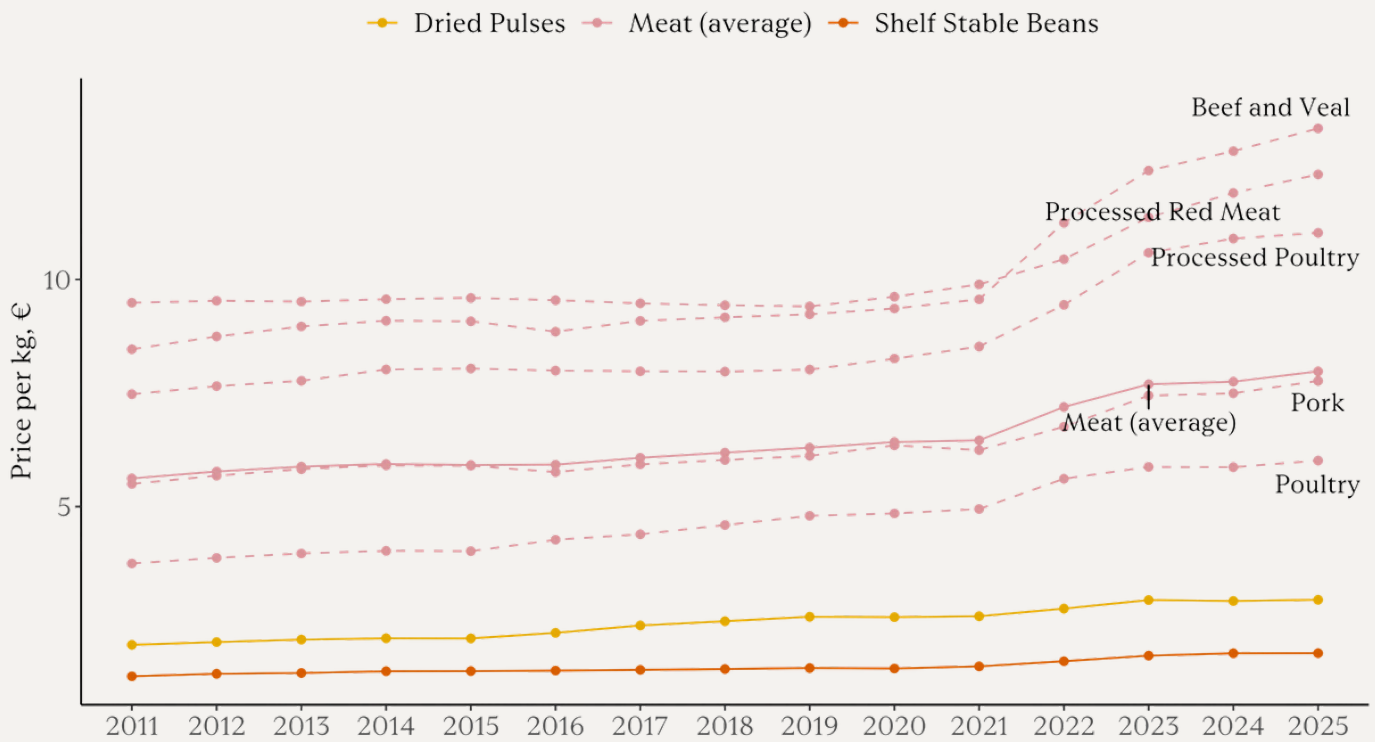
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Summary of Findings

2. This upward trend in prices, which is particularly pronounced in beef, is evident in both fresh and processed meat.

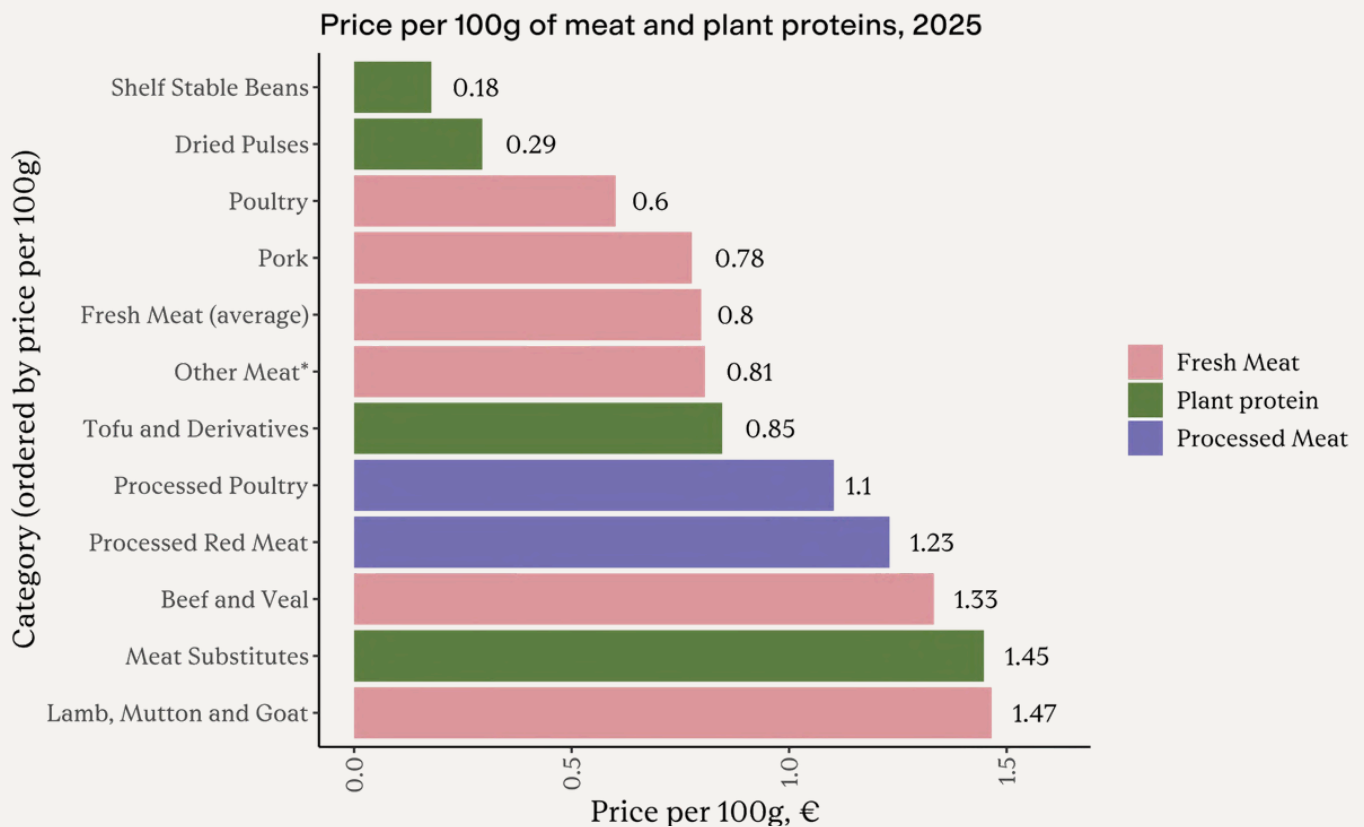
Protein-rich foods (fresh and processed): average retail prices



Source: Euromonitor International, Staple Foods, Industry Edition 2025¹

Summary of Findings

3. When comparing the price per 100 grams of protein-rich animal and plant-based foods in 2025, pulses stand out as the most affordable option and become a key product in helping household budgets withstand the pressure of food inflation, particularly in the most vulnerable households.



Source: Euromonitor International, Staple Foods, Industry Edition 2025

*Other meat includes game such as venison, rabbit and game birds like pheasant and partridge, as well as other domesticated animals including rabbit.



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Summary of Findings

4. In terms of processed protein products, the price of tofu and its derivatives continue to drop, making it one of the most affordable alternatives to animal protein and plant-based meat substitutes. The latter remain expensive, placing them beyond the reach of many families and making them more of a luxury than an everyday alternative.

This situation contrasts with the trend observed in more mature European markets, where a clear convergence of prices is evident as the sector scales up. Our analysis of the UK, for example, found that plant-based meat alternatives recorded smaller price increases than meat and, on average, are already cheaper than processed meat products.

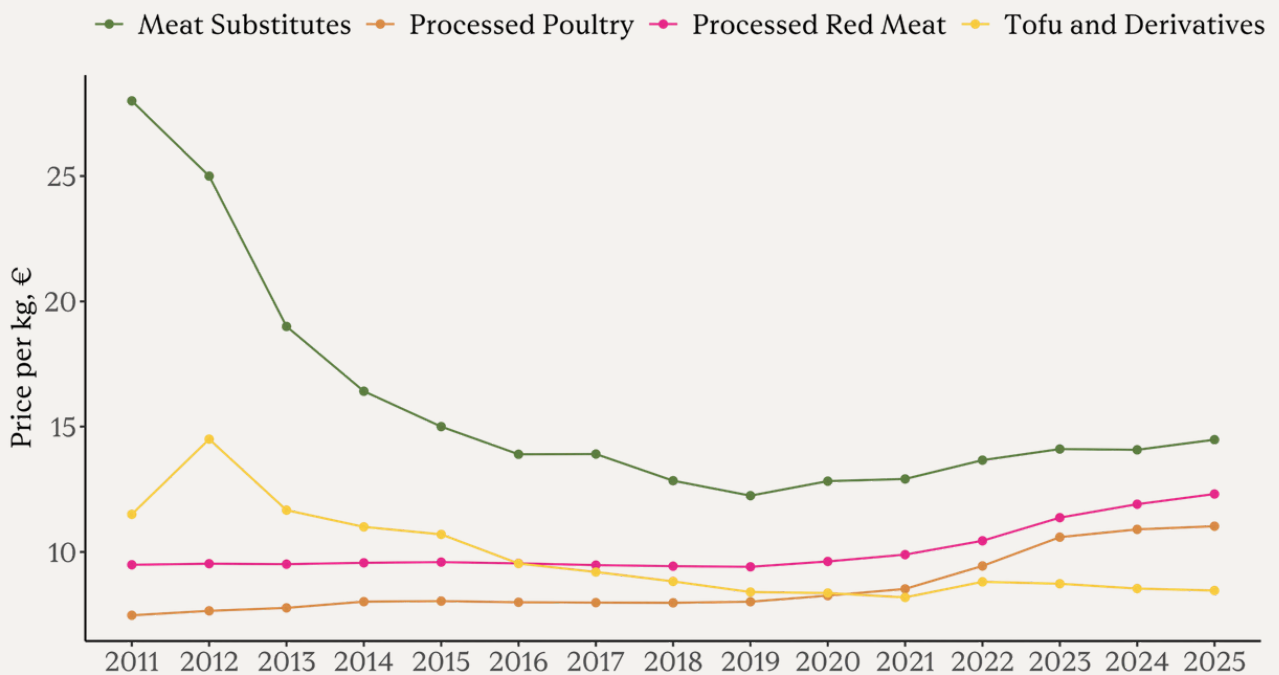
The case of Germany is particularly illustrative: in just three years, plant-based products have gone from being 52% more expensive to around 5% below the price of animal-based products today, driven mainly by major retailers' commitment to own-brand products and active price-parity strategies.

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Summary of Findings

This dynamic reflects a structural trend in Europe, where the growth of the plant-based market is closely linked to improvements in accessibility and price, with supermarkets playing a key role. Spain could follow a similar path as investment increases, scale is consolidated, and supermarkets—particularly through private labels—drive price parity in key categories beyond pulses.

Processed meat and substitutes - average retail prices



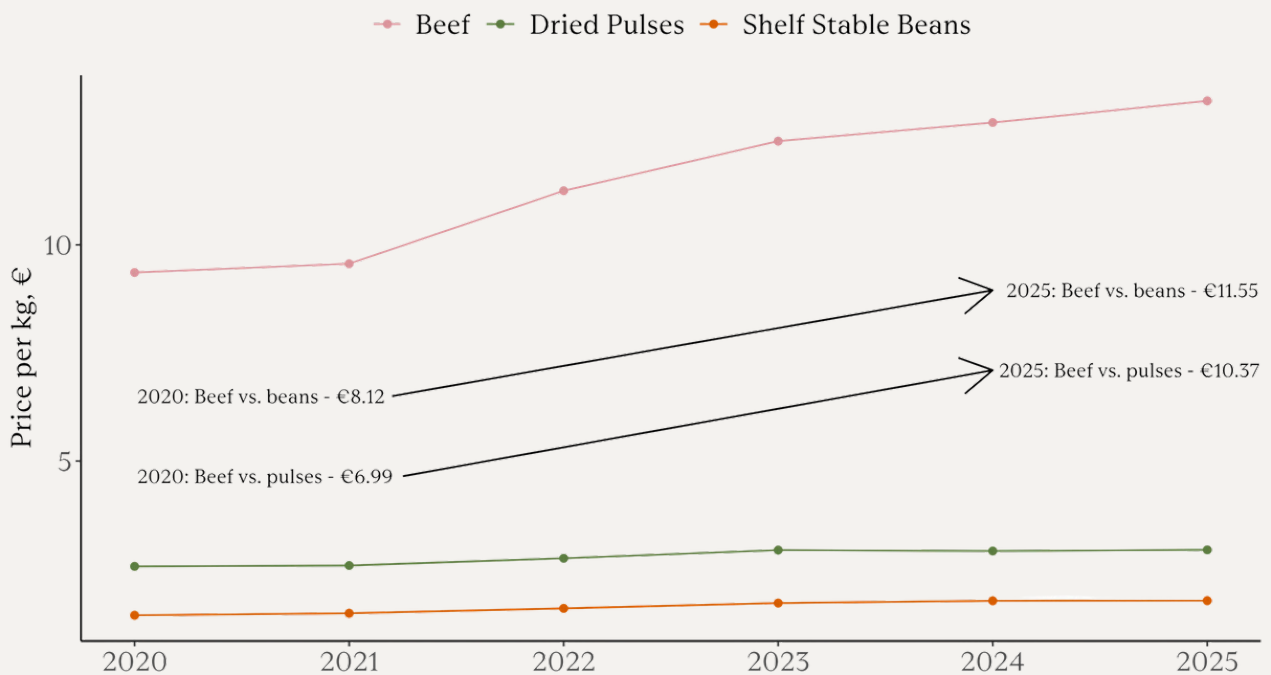
Source: Euromonitor International, Staple Foods, Industry Edition 2025¹

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Summary of Findings

5. The trend of pulses remaining relatively price stable as meat prices rise is creating a growing price gap between plant-based and animal-based protein. In the case of beef, the price difference with pulses has risen significantly over the last five years, increasing by approximately 48%.

Beef to Beans Gap



Source: Euromonitor International, Staple Foods, Industry Edition 2025¹

Summary of Findings

6. By 2025, retail sales volumes for most types of meat in Spain had fallen compared with 2011. The sharpest declines are seen in the most expensive meats: lamb (-61.1%) and veal and beef (-38.8%). Other meats (-29.8%) and poultry (-7.6%) have also fallen, whilst pork shows a smaller decline (-3.3%).

The pattern is clear: the more expensive the meat, the greater the fall in consumption. This reflects high price sensitivity, with shoppers changing their purchasing decisions.

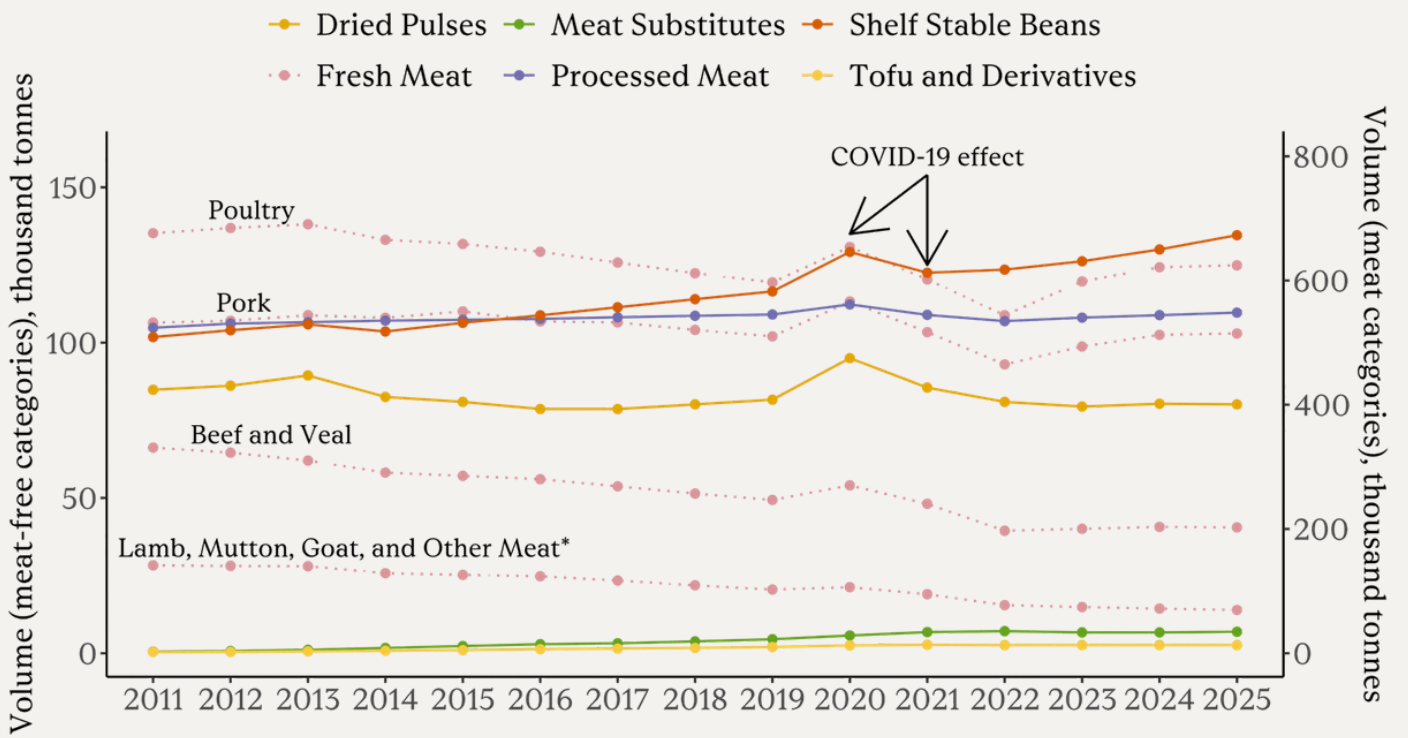
In contrast, plant-based substitutes for meat and seafood are growing strongly (+1280%), largely because they started from an almost negligible volume of just 0.5 thousand tonnes. Their significant drop in price (-48.3%) increases their appeal.

Meanwhile, long-life pulses also increased in volume (+32.2%) despite becoming more expensive (+40.2%), likely because they remain one of the cheapest protein options.

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Summary of Findings

Protein Food Retail Volumes 2011-2025



*Other meat includes game such as venison, rabbit and game birds like pheasant and partridge, as well as other domesticated animals including rabbit.

Source: Euromonitor International, Staple Foods, Industry Edition 2025¹



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When food takes up a fifth of the budget

Today, for many Spanish families on a tight budget, the supermarket has become yet another source of financial stress. Food is a basic expense that can be cut back on, but never avoided.

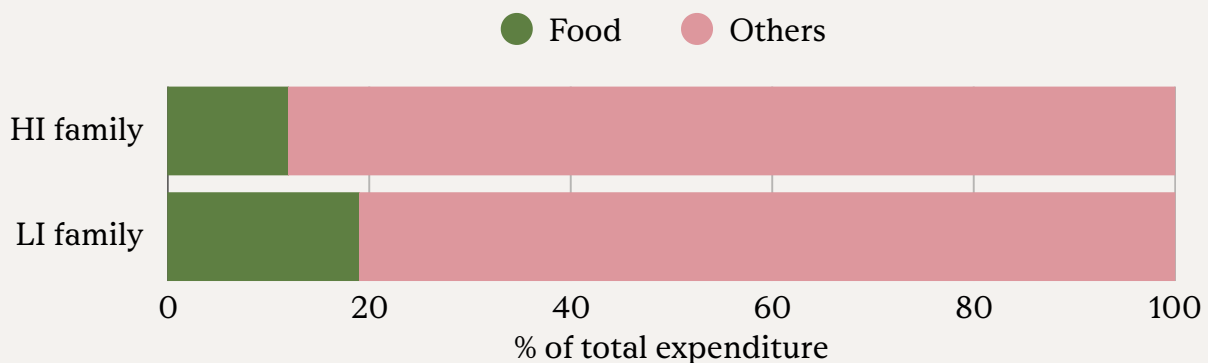
Inflation is not neutral: it hits those on lower incomes hardest. From this perspective, we see how the rising cost of basic foodstuffs, including meat, disproportionately affects lower-income households, who are forced to devote an increasing proportion of their budget to something as essential as food.

Data from the Household Budget Survey by the Spanish National Statistics Institute clearly illustrate this gap. While higher-income households spend around 12% of their budget on food, the most vulnerable families must spend almost 20% (19.9%) of their total expenditure simply to fill the fridge. Against this backdrop, the rise in meat prices in recent years, around 25% on average over five years and more than 40% in the case of beef, comes on top of other sharp increases, particularly in housing and energy.

The result is that inflation is not felt equally across all households: as lower-income families allocate a larger proportion of their budget to food, every price rise affects them more and erodes their real purchasing power more rapidly.

When food takes up a fifth of the budget

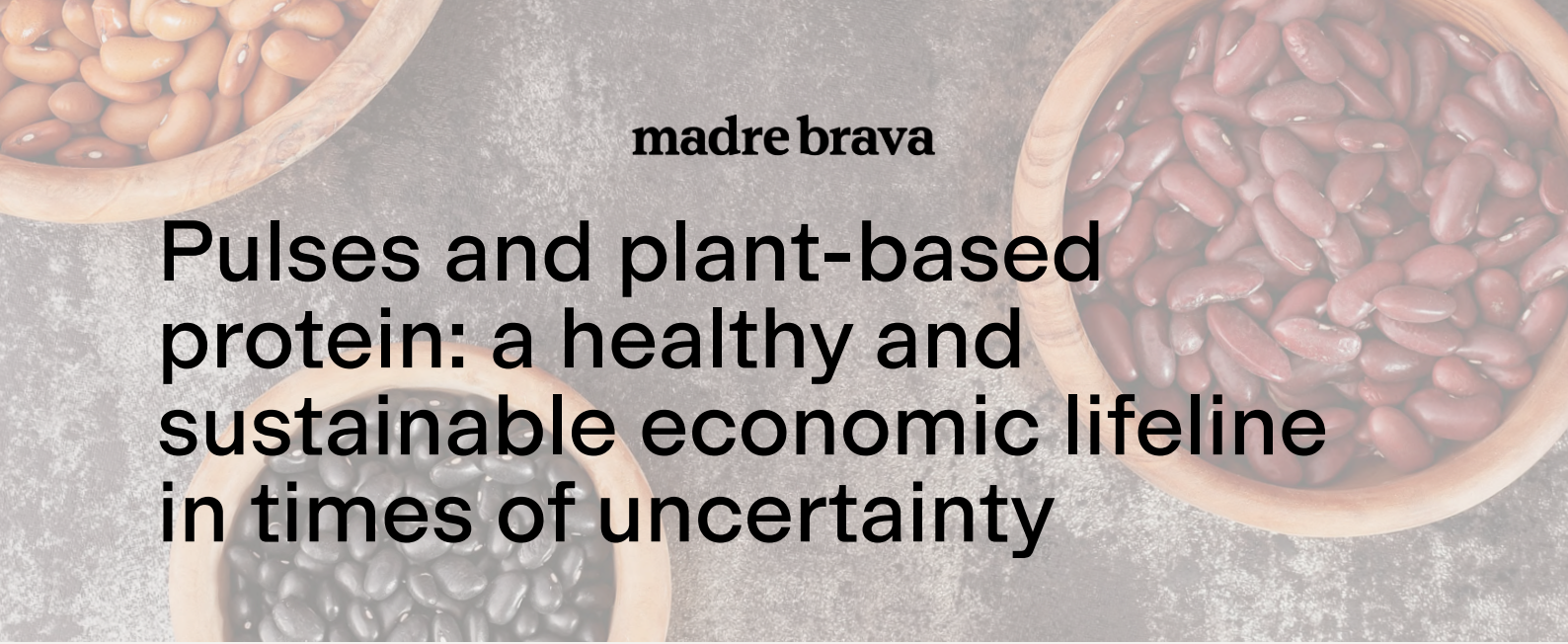
Difference in the proportion of expenditure that high- and low-income families spend on food and drink



There is also a telling statistic: although the proportion of expenditure on food and drink remains highest for the lowest-income quintile, it is the only quintile for which this proportion has fallen since 2016. And we know this is not because prices have fallen, as they have, in fact risen sharply. It is because these families have reached the limit of what they can spend on food.

Many families are caught between rising costs and purchasing decisions driven by immediate needs. However, there are affordable, healthy and sustainable options, such as pulses, which could help balance both diet and budget.

The challenge is not only financial, but also one of habits: in a country where pulses are part of the culinary tradition, there is a window of opportunity to bring them back and make it easier for families to prioritise them once again in their daily diet.



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Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

In the current economic climate, marked by international conflicts that are having devastating human consequences and a significant impact on energy and fertiliser prices, geopolitics will also make itself felt in the supermarket aisles. Global tensions will be reflected in food prices, putting further pressure on many families' budgets.

The conflict in Iran is already putting pressure on global energy markets. The blockade of the Strait of Hormuz, through which around 20% of the world's oil passes, has triggered sharp rises in crude oil and gas prices, with double-digit increases already being felt at the petrol pump.

But the most profound impact, which we are only just beginning to glimpse, is being felt in the fertiliser sector, a critical link in the food system, through two channels: supply issues and rising energy costs.

On the one hand, the Strait of Hormuz, through which approximately a third of the world's fertiliser trade by sea passes, has become a critical chokepoint, raising the risk of shortages and putting pressure on prices.

On the other hand, fertiliser production depends directly on natural gas. Current disruptions are already causing sharp price rises. Since the start of the conflict, urea prices have risen between 30% and 40%, while the global prices of fertilizers have risen by up to 32%, foreshadowing further pressure on agricultural costs.



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Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

What we are seeing at petrol stations today will be felt at the supermarket tomorrow. Rising energy and fertiliser costs will be passed on to the shopping basket, putting renewed pressure on households.

And it is precisely the shopping basket which provides families with one of their few areas of manoeuvre. In the face of persistent food inflation, pulses are emerging as one of the most effective options: a food that enables a healthier and more sustainable diet, while helping to ease the pressure on household budgets.

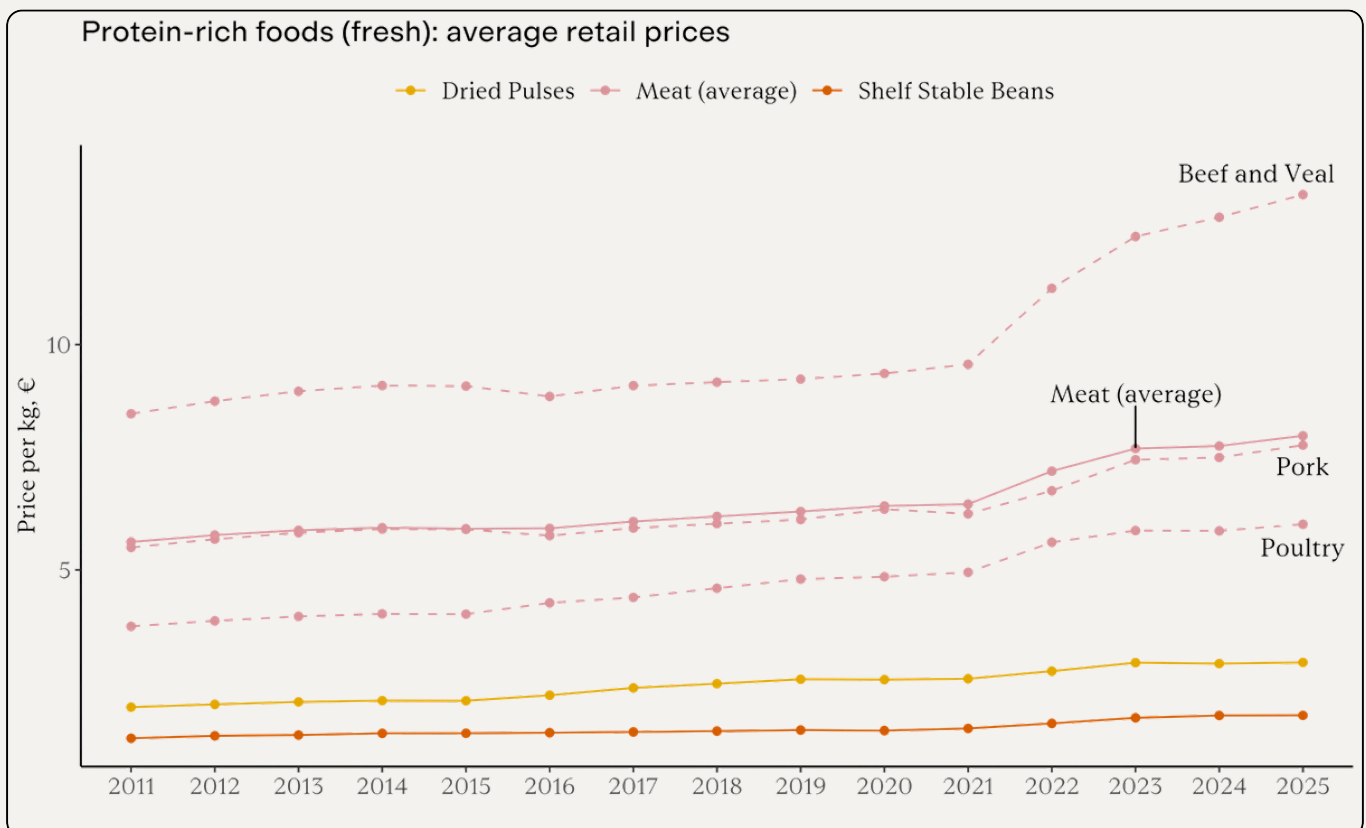
In short, pulses offer a rare triple benefit: they are good for the wallet, good for health and good for the planet. It is therefore essential to ensure that consumers can access them and fully reap their benefits.

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Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

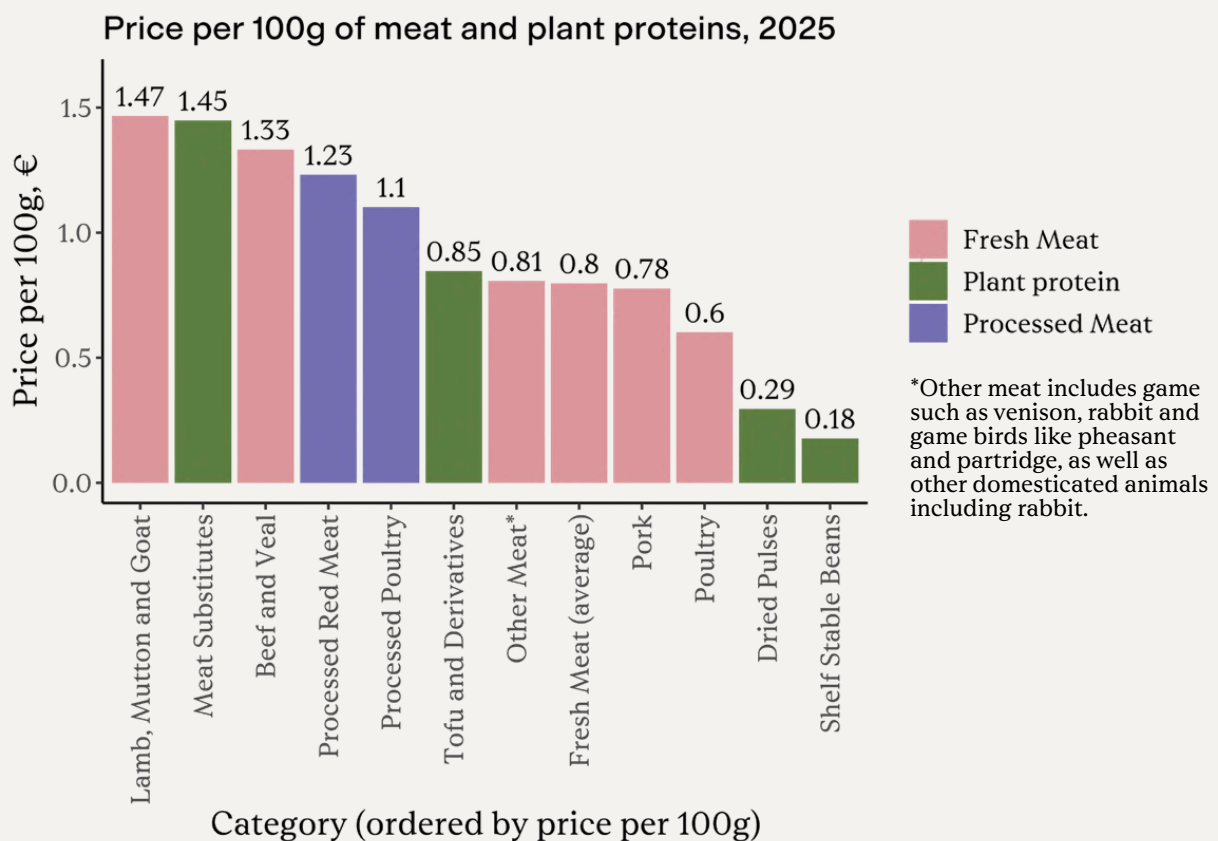
Pulses as a social and economic buffer

Meat prices have skyrocketed, rising by an average of €1.56 (€3.96 in the case of beef), from €6.42 in 2021 to €7.98 in 2025. Meanwhile, the cost of pulses has remained more stable. Over the last five years, the price has risen by just €0.33 (from €1.44 to €1.77) for tinned pulses and €0.38 for dried pulses (from €2.57 to €2.96).



Source: Euromonitor International, Staple Foods, Industry Edition 2025¹

Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty



The price gap between meat and pulses is widening every year, and all the signs suggest this trend will continue. Structural factors such as international conflicts, which put pressure on supply chains and drive up production and distribution costs, together with the growing impact of climate change on the availability and cost of resources (feed, water, energy), are putting particular upward pressure on meat prices.

In this context, pulses, with a more stable cost structure and, relatively speaking, less exposure to these risks, are reinforcing their role as one of the most accessible alternatives and as an effective shield against food inflation.



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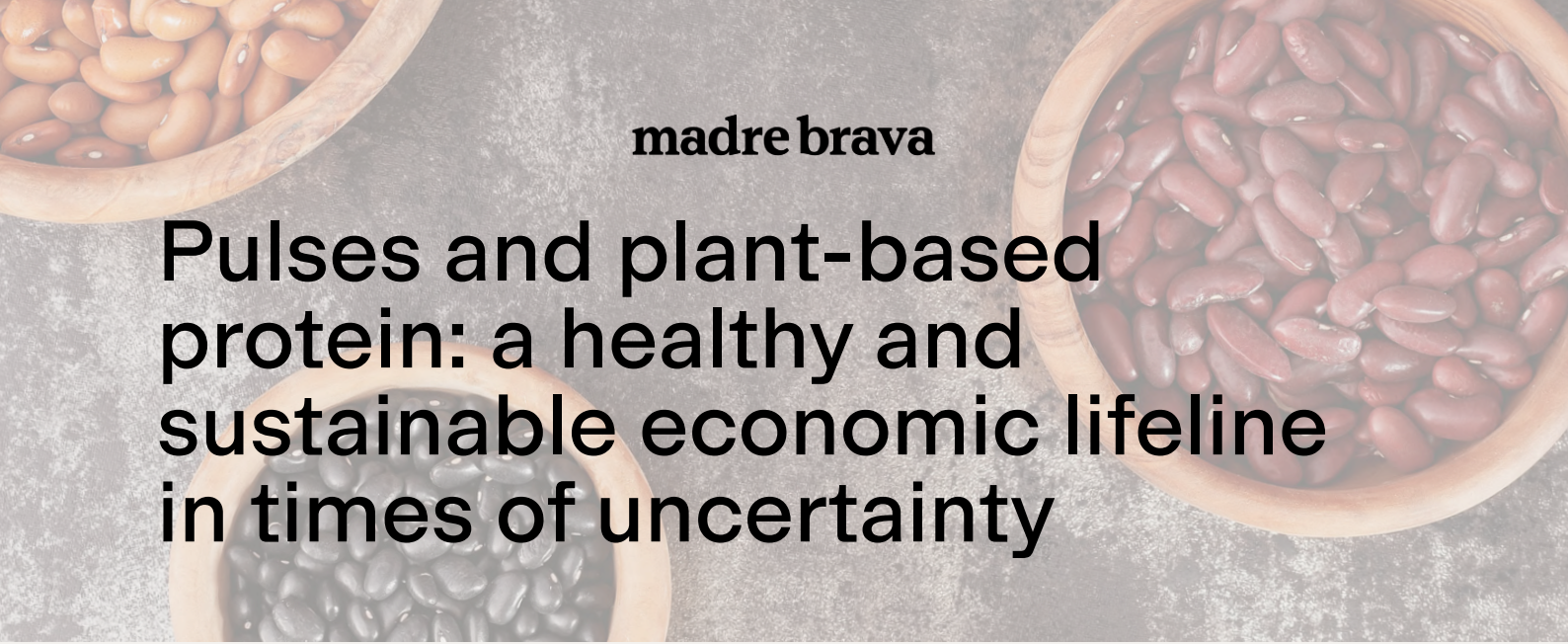
Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

Pulses: the perfect combination of protein and fibre that looks after our health

When we look at pulses from the perspective of their health impact, we are dealing with a food with genuine superpowers. They are one of the main sources of plant-based protein, with a protein content that can range from 19% to 36% of dry weight. Furthermore, when combined with cereals (for example, lentils with rice), the quality of their protein is comparable to that of animal sources, as the essential amino acids in both foods complement each other. And all this without the saturated fat content typical of many meats.

But the superpower of pulses goes beyond their protein content. Unlike meat, they provide fibre as well as protein, a combination that is particularly beneficial for disease prevention. Numerous studies show that increasing fibre intake is associated with a lower risk of cardiovascular disease, type 2 diabetes and various types of cancer.

In Spain, we consume far less fibre than is recommended. According to the ANIBES study on nutrition, average consumption stands at 13.5 grams per day, falling to 12 grams per day among people with obesity – well below the 25–30 grams per day recommended by the Spanish Society of Community Nutrition (SENC) and endorsed by the Spanish Agency for Food Safety and Nutrition (AESAN).



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Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

In addition to high-quality protein and fibre, pulses provide numerous essential micronutrients, such as iron, potassium and magnesium, and have a low glycaemic index.

Thanks to this nutritional profile, pulses are a central component of the Mediterranean diet, one of the dietary patterns with the strongest scientific evidence for the prevention of cardiovascular and metabolic diseases. Regular consumption is associated with a lower risk of cardiovascular disease, type 2 diabetes and various types of cancer, as well as helping to lower cholesterol. In other words, incorporating more pulses into the diet helps to improve public health.

And this improvement in health also has an economic impact. Some studies estimate that improving the population's diet could reduce public healthcare expenditure by around €14.3 billion, or around 20%. Promoting the consumption of plant-based proteins, particularly pulses, could be one of the most effective strategies for improving public health and reducing the strain on the healthcare system.



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Pulses and plant-based protein: a healthy and sustainable economic lifeline in times of uncertainty

Pulses and plant-based protein: allies of food security and the health of the planet

As well as being healthy, pulses are also one of the most sustainable sources of protein available.

Their production generates far fewer greenhouse gas emissions, uses less water and requires less land than animal-based proteins, thereby reducing pressure on ecosystems and natural resources.

Comparative studies show that producing plant-based protein such as that from peas or beans can generate up to tens of times fewer emissions than producing the same amount of protein from beef.

This difference is key to the future of the food system. The report Transforming the Global Food System highlights that moving towards diets richer in plant-based foods is one of the most effective ways to reduce emissions from the food system, with a climate impact far greater than that of many technological improvements in agricultural production.

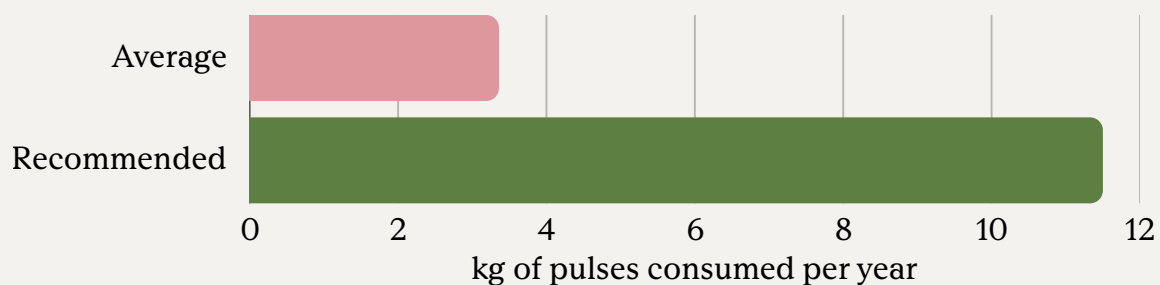
Against a backdrop of climate emergency, geopolitical tensions and global population growth, opting for plant-based proteins such as pulses is not only a healthy choice, but also a key strategy for feeding the planet sustainably.

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The paradox of pulses: the traditional staple that doesn't make it onto plates

Although pulse consumption in Spain has seen a slight upturn in the last year analysed, it remains far below recommended levels. According to the Annual Report on Food Consumption in Spain 2024 by the Ministry of Agriculture, Fisheries and Food (MAPA), on average, each resident consumed 3.36 kilos of pulses per year, a figure well below the 11.5 kilos per year recommended in dietary guidelines.

Average vs Recommended consumption of pulses in Spain, 2024



Even so, the 2024 data offered a glimmer of hope: consumption rose by 1.5% compared to 2023, and the total volume of purchases also increased, with Spanish households buying 2.8% more pulses.

However, this slight increase does not offset the cumulative decline over recent decades. In Spain, pulses consumption fell by around 60% between 1981 and 2014, and between 2020 and 2023 it fell again by approximately 19%. This trend reflects a profound shift in eating habits and a gradual move away from the Mediterranean diet, of which pulses have traditionally been a cornerstone.



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The paradox of pulses: the traditional staple that doesn't make it onto plates

Pulses have not only been disappearing from Spain's tables, but also from its fields. Since 1990, domestic pulse production has fallen by 25% and today accounts for barely 3% of the total agricultural land under cultivation in Spain (around 0.56 million hectares).

This creates a paradox that is difficult to justify: Spain produces only about a third of the pulses it consumes. The remaining 67% comes from imports, which increases dependence on global supply chains and adds an unnecessary carbon footprint to a food that could play a key role in a healthier, more sustainable and resilient food system.

Many of the lentils consumed in Spain travel over 7,000 kilometres from North America before reaching Spanish plates, when they could be grown in Spain.

Reversing this trend presents an opportunity. Increasing the consumption and production of pulses would help strengthen food sovereignty, boost rural economies and reduce emissions, as well as improving public health.

The challenge now is to make the healthiest, most sustainable and affordable option the easiest one to choose. And in a food system where supermarkets are the architects of our shopping baskets, their role is key to accelerating that change.



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The power of supermarkets to change the food system

We need to ensure that everyone has access to “good food”: food that tastes good and is good for our health, the planet and our pockets. And it is supermarkets that have the power and responsibility to guarantee this right to eat well. Supermarkets must go beyond simply selling products and take an active role in building a healthier, more sustainable and fairer food system. In practice, this means:

- **Making it easy.** Supermarkets must ensure that the healthiest and most sustainable options, such as pulses, are also the most affordable, visible and accessible on the shelves, making nutritious and climate-friendly choices the default option, rather than the exception.
- **Improving in-store information to guide choice.** Supermarkets have the ability to connect food, health and the climate in a way that resonates with the public, showing that a plant-rich diet is not a ‘green’ trend reserved for a minority, but a practical, affordable, healthy and low-carbon solution for everyday eating and household economic resilience.



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The power of supermarkets to change the food system

- **Leading the diversification of protein sources:**
 - By investing in pulses and innovative plant-based protein formats, the retail sector has the opportunity, and the responsibility, to accelerate the transition towards more sustainable and accessible food models.
 - A firm commitment to these categories through scaling, private-label development, and active pricing strategies, can help close the accessibility gap and pass on the benefits of a growing market to consumers.
 - As a concrete next step, the sector should commit to achieving a 60-40 split between plant-based and animal-based foods by 2035.
- **A return to the traditional foods that have always been on our tables: it is time for supermarkets to recommit to pulses.** In practice, this means expanding the range of products available (from new varieties and mixes to formats adapted to modern consumption), incorporating more ready meals, salads or snacks made from pulses, and committing to including a wider and better variety of affordable plant-based alternatives in their range. But it also means something essential: offering tasty, attractive and easy-to-prepare products that appeal to consumers' tastes. At a time when convenience products dominate the shopping basket, focusing on these formats can help pulses regain a central place in families' diets.

Conclusion

The structural factors that have driven up the cost of meat are not only persisting but intensifying, fuelled by the impact of climate change on agricultural production and by geopolitical tensions affecting key costs such as energy and fertilisers.

In this context, the relative stability of plant-based proteins, such as pulses and plant-based alternatives to meat and seafood, reinforces their appeal as an affordable, healthy and sustainable option for consumers.

As the architects of our shopping baskets, supermarkets play a key role in accelerating this transition. Setting clear targets to rebalance their protein sales by 2035, alongside a decisive investment in pulses and plant-based alternatives, will be crucial to translating this shift into actual consumption.

Committing to pulses is, moreover, a winning strategy in the new household economy: a tool that enables Spanish families to weather food price rises and transform a basic necessity into an opportunity to eat better.

Spanish supermarkets must take responsibility and ensure that good food, sustainable, healthy and delicious, is the easiest and most affordable option when filling the shopping basket.