



NATIONAL FOOD STRATEGY

EXECUTIVE SUMMARY





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WHY A NATIONAL FOOD STRATEGY
HAS BEEN DRAWN UP

PURPOSE AND MISSION OF THE
NATIONAL FOOD STRATEGY

THE NATIONAL FOOD STRATEGY
DEVELOPMENT PROCESS

CHALLENGES AND ACTIONS

SPAIN AS A **FOOD POWER**

Why a National Food Strategy has been drawn up

In Spain, food is an essential part of our cultural identity, a source of economic wealth and a cornerstone of social welfare. Spain's geography, together with its particular climatic conditions, enables the production of diverse and varied foodstuffs, which give shape to our inland and coastal landscapes. Furthermore, the Spanish agri-food and fisheries sector is a key economic engine that generates employment, supports the development of rural and coastal areas and makes a significant contribution to exports.





Current challenges such as climate change, geopolitical tensions, food security and sustainability require the rethinking and transformation of our food system to adapt it to the needs of the 21st century, while preserving our agricultural, fishing and culinary heritage.

The National Food Strategy (ENA - Estrategia Nacional de Alimentación) was developed as a response to these uncertainties. It is a priority for government action; a document for the future which will define and determine Spain's position in the face of the forthcoming food challenges.

Purpose and mission of the National Food Strategy

The purpose of the ENA is to establish a sustainable food system in Spain and Europe in order to achieve open strategic autonomy.

The strategy will shape the future of a competitive sector that will consolidate Spain as a world leader in food excellence, capable of meeting the present and future needs of the population, while revitalising rural and coastal areas dependent on fisheries and aquaculture.

The strategic approach is to maximise existing strengths, optimise instruments and programmes, and align public policies to facilitate the transition to an innovative, sustainable and cost-effective food model.

To this end, the ENA's mission is to define a comprehensive, sustainable and competitive food system, deeply rooted in the territory, based on diversity and on the production of healthy, accessible and high quality food, recognised and valued by people all over the world.

To achieve this objective, the Strategy focuses on the following challenges:

01.

Ensuring strategic food supply to the entire population, both inside and outside Spain, via mechanisms that ensure the availability and stability of food supplies.

02.

Promoting the sustainability of the food system, using environmentally friendly practices, particularly with regard to climate change, and ensuring the conservation of natural resources.

03.

Defining a comprehensive, sustainable and competitive food system, one that is carbon neutral, adaptable to climate change and deeply rooted in the territory, based on diversity and food production.

04.

Strengthening rural and coastal areas highly dependent on fisheries by supporting producers and strengthening the rural and coastal economy.

05.

Encouraging healthy, high-quality food habits for the population, thus improving people's quality of life.

06.

Driving innovation and technology, by supporting research and technological development, as well as innovative practices to improve the efficiency and competitiveness of the agri-food and fisheries sector.

07.

Encouraging transparency and accessibility of food information for consumers in order to facilitate informed and responsible purchasing decisions.

The National Food Strategy development process

The development of this Strategy has been conducted in a participatory manner throughout 2024, listening to and noting the concerns, needs and contributions of all stakeholders in the food system in order to ensure that all perspectives are reflected in the document.

The process of reflection and debate around food has involved a wide range of stakeholders, including organisations in the sector, civil society and academia, as well as the Spanish Economic and Social Council.

In the design of this participatory process, a structured methodology was followed, as detailed below:

Participative fora

Experts from various fields were involved and various fora were held to reflect on the food system and the current challenges it faces. The fora addressed a variety of issues, such as holistic sustainability, supply security, rural regeneration, nutrition, health and innovation, among others. All of this falls within the framework of the search for a more resilient and collaborative agri-food and fisheries system.

Meetings

Ten policy meetings chaired by the Minister of Agriculture, Fisheries and Food and 36 meetings at technical level with associations and representatives of the agri-food and fisheries sector have been held. It has been a process of active listening, with very useful contributions and an analysis of the current food situation in Spain in order to determine the direction in which Spain wants to go

E-mail inbox

The participatory process also considered contributions submitted via the e-mail inbox bn-ena@mapa.es, which received more than 110 contributions and suggestions.

Challenges and actions

In the light of the SWOT analysis and the participatory process, a series of challenges have been outlined, which are described in Chapter 6, where the main content of the Strategy is set out.

Each of these challenges includes the measures proposed to address them, after incorporating the contributions of the different stakeholders in the chain and the sector.

The challenges identified are as follows:



I. Strategic supply

Security of supply is essential for sustainable development, social stability and the general welfare of the population. Based on the principle of Open Strategic Autonomy, the strategy prioritises Spain's ability to act autonomously in critical areas, such as food sufficiency, without compromising its international trade relations. This challenge is addressed through four major measures aimed at promoting availability and stability in food supply, in coordination with other trade policies, ensuring the competitiveness of the Spanish agri-food and fisheries sector, optimising efficiency in the value chain and defining protocols for responding to crisis situations.

II. Sustainable food systems

Sustainability in the food system is essential in balancing food production with environmental protection, human health and social welfare. This requires responsible production, protecting natural resources, reducing environmental impact and ensuring sufficient and nutritious food for current and future generations. It also builds in social sustainability by strengthening local economies and rural and coastal communities.

In the face of global challenges such as climate change and the loss of biodiversity, production systems must be transformed to be more efficient, resilient and sustainable. The Strategy proposes key measures aimed at integrating sustainability in various areas, such as public procurement, the promotion of low-emission production, the efficient use of water and the development of renewable energies, as well as promoting the circular economy through the recovery of agri-food by-products. Support for sustainable practices, such as low-emission production, efficient water use and the promotion of renewable energies, will also continue to be promoted.

Sustainable management of marine resources, through responsible fishing practices that preserve marine habitats

while conserving fisheries, is another priority. Additionally, the sale of local and seasonal products is encouraged as a way to strengthen rural economies.

Finally, efforts are being made to reduce food waste and to train stakeholders in the food chain in order to smooth the transition to a more sustainable system.

III. Strengthening rural and coastal areas highly dependent on fisheries

Rural and coastal areas, vital for Spain's balanced development, face challenges such as depopulation, an ageing population and lack of infrastructure, limiting their opportunities and viability. Three key measures are proposed in order to reverse this situation: a) ensuring adequate training for the sector to improve its competitiveness; b) strengthening the rural and coastal fabric through economic support and the implementation of rural policies aimed at building a sustainable, efficient and resilient sector; and c) fostering generational change to ensure the future of the rural and coastal environment.

IV. Healthy eating

Promoting healthy living requires a holistic approach that goes beyond food. Physical and emotional well-being, physical activity and environmental sustainability are key to strengthening individual and collective health. The Mediterranean Diet, recognised by UNESCO as Intangible Cultural Heritage, is a model of balanced, sustainable and healthy eating. Its combination of fresh, local and seasonal foods, together with its scientifically proven benefits, position it as the cornerstone for the promotion of a healthy lifestyle. This model can be complemented by the Atlantic Diet, which shares similar characteristics and reinforces the consumption of high nutritional quality fish products. The ENA is committed to the promotion of healthy eating patterns based on the Mediterranean Diet and the Atlantic Diet, while preserving the Spanish culinary identity. The aim is to ensure accessibility for the entire population to healthy, fresh food. Priority is also given to increasing education around food and promoting healthy eating habits from an early age.

V. Innovation and technology in food

The digital and technological transformation in the agri-food and fisheries sector aims to improve productivity, provide nutritious food, protect the environment and adapt to new demands. To this end, four measures are proposed: a) encourage innovation in food, processes and distribution through biotechnology and new genomic techniques to improve crops; b) digitalise production models to optimise resources and respond efficiently to the market; c) increase knowledge transfer through training and open innovation programmes; and, finally, d) encourage investment in innovation while promoting regulation that favours innovation to modernise the sector and positions Spain as a leader in a sustainable and efficient food model.

VI. Food information for consumers

Consumers play a crucial role in the food system, as their purchasing decisions determine which products are successful and how the market evolves. Clear and accessible food information is essential for consumers to make responsible choices. The ENA aims to improve food labelling and transparency at the point of sale. Food education and communication campaigns are also encouraged so that citizens can make responsible purchasing decisions on the basis of accurate information.

Those measures that may entail additional costs will be financed, where appropriate, from the budget available in the relevant ministries, with no additional allocations foreseen for this National Food Strategy.

Once the challenges and measures to be adopted to achieve the objectives of the ENA had been identified, it was recognised that this would be an opportunity for Spain to collate all those initiatives requiring debate at the European Union level. The purpose is clear: to convey Spain's position on these issues so as to exert influence as a food power.

The ENA also includes other key chapters, including one on holistic food analysis, exploring how factors such as technology, health, the environment and the economy influence our purchasing habits and decisions. The chapter on the study of food consumption in Spain is also of particular note, assessing the relationship between the Mediterranean and Atlantic diets and the evolution of their key products, as well as the consumption trends that are fundamental for the design of food policies. It also describes the food system, covering everything from the primary sector to industry, distribution and gastronomy.

Finally, a selection of success stories is included, with the aim of providing a source of inspiration and motivation for all stakeholders, highlighting initiatives that are already making a difference and can serve as models that can be replicated in other contexts

Spain as a food power

Spain is a food power, as shown by the data on the agri-food and fisheries sector, both in terms of its contribution to the Spanish economy and in terms of promoting social cohesion in our rural and coastal areas.

Spain is ranked first in the European Union in terms of agricultural income, the world's leading exporter of olive oil, second in terms of wine and the world's third largest producer of pork. With regard to the fisheries sector, Spain is the European Union's leading country in terms of fleet capacity and the main producer of aquaculture, as well as having a well-developed industrial sector for the processing of fishery products. The food industry is the largest manufacturing industry in the country and the fourth largest in the European Union in terms of turnover.

The Mediterranean Diet is recognised around the world as a culinary

reference and is a genuine attraction and selling point for the 90 million tourists who visit the country every year. Moreover, its foodstuffs are renowned for their quality not only in Spain but also in practically every country in the world, to which products worth more than 70,000 million Euros a year are exported.

These figures demonstrate the relevance of the Spanish agri-food and fisheries sector in the European and international contexts. Spain has a great contribution to make in terms of food, and this Strategy represents a key opportunity to consolidate its leadership and project its vision to the world.



