# Staple Foods in the United Kingdom

December 2025

Table of Contents

### WHAT'S NEXT?

Baked goods to benefit as premiumisation and convenience aspects drive consumer demand
Health-focused innovation drives reformulation and portion-controlled launches
Premium formats to gain popularity as consumers seek restaurant-style experiences at home

### COMPETITIVE LANDSCAPE

By balancing affordability with premiumisation, Tesco successfully caters to a wide spectrum of shopper preferences
Geary's Bakeries invests strongly to see dynamic growth

### CHANNELS

Hypermarkets retains leadership amidst growing challenges
Rapid development of e-commerce in baked goods distribution

### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

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## Breakfast Cereals in the United Kingdom

### KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Retail value sales rise but category pressures persist

### INDUSTRY PERFORMANCE

Hot cereals offer a combination of health and convenience aspects
RTE cereals face headwinds over unhealthy content

### WHAT'S NEXT?

More health-focused brands to enter the fray
Players to target the demand for protein and gut health products
Upcoming HFSS restrictions are driving healthier recipe development

### COMPETITIVE LANDSCAPE

Leading players are ceding ground to value for money offerings
Premium health focus boosts Flahavan & Sons's performance

### CHANNELS

Hypermarkets cater successfully to consumers' needs
Schemes, models and consumer lifestyles drive e-commerce onwards

### CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

The category records retail current value sales gains amidst demand headwinds

INDUSTRY PERFORMANCE

Chicken enjoys high popularity while shelf stable and frozen processed seafood grow demand

Tofu and derivatives respond to the consumer call for nutritious, plant-based options

WHAT'S NEXT?

Category outlook indicates a mixed performance as UPFs concerns rise

Desire for convenient, restaurant-style dishes can help to sustain demand

Meat and seafood substitutes need to overcome concerns over taste, affordability and nutritional benefits

COMPETITIVE LANDSCAPE

Private label to continue to dominate by combining value for money with strong commitments to provenance and welfare

Innovation spurs Better Nature's fast growth performance

CHANNELS

Large modern grocery retailers dominate with strong and developing assortments

Omnichannel retailing gains pace

CATEGORY DATA



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## Rice, Pasta and Noodles in the United Kingdom

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price stability boosts the demand for rice, pasta and noodles

INDUSTRY PERFORMANCE

Demand for cost-effective, filling food maintains rice's leadership

Chilled noodles enjoy rising popularity as quick restaurant-style meals

WHAT'S NEXT?

The demand for premium offerings is set to bolster retail value sales

Global flavours drive adventure and dynamism

Players to innovate healthier formulations to meet the demand for premium staple foods

COMPETITIVE LANDSCAPE

Unilever Foods expands its portfolio to offer bold, flavoursome instant noodles

Tat Hui Foods invests in products, marketing and distribution to drive fast growth

CHANNELS

Major grocery retailers develop and expand their portfolios to lure consumers

E-commerce gains by offering convenience and access to premium products

CATEGORY DATA



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