



**Euromonitor
International**

Staple Foods in the United Kingdom

December 2025

Table of Contents

Staple Foods in the United Kingdom

EXECUTIVE SUMMARY

Retail value over volume growth but there are bright spots in consumer demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Affordability drives shoppers

Convenience continues to win over consumers

International flavours abound as consumers seek authenticity

WHAT'S NEXT?

Healthier food trend to drive significant change across categories

Players still need to convince consumers to choose ultra-processed foods

Sustainability as a growth driver and differentiator

COMPETITIVE LANDSCAPE

Tesco balances quality with affordability to lead the field

Private label and newer branded players continue to gain traction in staple foods

CHANNELS

Hypermarkets lead but the competition intensifies

E-commerce continues to gain strategic importance

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in the United Kingdom

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail current value sales grow yet inflationary pressures continue to challenge retail volume sales

INDUSTRY PERFORMANCE

Shift to higher-quality, convenient and authentic products

Pastries capitalise on indulgence and convenience trends

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 retain 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

COUNTRY REPORTS DISCLAIMER

[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

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in the United Kingdom

KEY DATA FINDINGS

2025 DEVELOPMENTS

The category sustains growth as the demand for convenience persists

INDUSTRY PERFORMANCE

Consumers appreciate the content, convenience and value of frozen processed potatoes

The home cooking trend and popularity of Italian cuisine boost the use of shelf stable tomatoes

WHAT'S NEXT?

Need for convenient and nutritional meal options to sustain growth trajectory

Innovation to shift to premium and convenient options

Rising demand for bold and global flavours to stimulate innovation

COMPETITIVE LANDSCAPE

McCain Foods (GB) leverages innovation and responds to consumer lifestyle needs and sustainability to top the rankings

Focus on quality and authenticity underpins Mutti's strong growth performance

CHANNELS

Retail offline formats continue to develop to maintain distribution dominance

E-commerce gains as online platforms answer consumer needs

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in the United Kingdom

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

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-in-the-united-kingdom/report.