Fresh Food in the United Kingdom

EXECUTIVE SUMMARY

Fresh food in 2022: The big picture
2022 key trends
Retailing developments
What next for fresh food?

MARKET DATA

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DISCLAIMER

SOURCES

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Eggs in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS

Retail volume sales decline in 2022 as the industry struggles with inflationary pressure
Sustainability concerns push demand away from colony eggs and drive innovation

PROSPECTS AND OPPORTUNITIES

Sales of eggs projected to grow across all channels, but price rises will remain a challenge
Innovation is focusing on health credentials, while launches of egg alternatives are increasing

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Fish and Seafood in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
Retail volume sales decline as inflation limits consumers’ disposable incomes
Foodservice sales continue to underperform, as eating out occasions remain limited

PROSPECTS AND OPPORTUNITIES
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Public bodies are investing in innovation, labour and sustainability

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Fruits in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
Retail volume sales decline as out of home mobility recovers
Global supply chain disruptions lead to strong price increases

PROSPECTS AND OPPORTUNITIES
Total volume sales projected to grow as the category offers versatility and high nutritional value
Retailers will continue to invest in sustainability

Summary 4 - Major Processors of Fruits 2022

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**Meat in the United Kingdom**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
Demand switches back to the foodservice and institutional channels from retail
Inflationary pressure turns consumers towards cheaper sources of protein

**PROSPECTS AND OPPORTUNITIES**
Retail volume sales of meat to see only slow growth, as affordability, health and sustainability concerns push consumers away
Flexitarianism intensifies the competition between meat and alternative protein sources

**Summary 5** - Major Processors of Meat 2022

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**Nuts in the United Kingdom**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
Snacking gains importance as mobility returns
Resilient supply chains for nuts support growth amongst inflationary period

**PROSPECTS AND OPPORTUNITIES**
Nuts to benefit from health and versatility, expanding beyond snacking
Nuts to gain popularity as unprocessed snacks grow in the HFSS era

**Summary 6** - Major Processors of Nuts 2022

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Pulses in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
War in Ukraine and climate change lead to challenges for the pulses supply chain
Improved awareness of nutritional qualities of pulses fosters consumption

PROSPECTS AND OPPORTUNITIES
Pulses benefits from convenience and versatility in the plant-based world
Pulses production to grow amidst climate change
Summary 7 - Major Processors of Pulses 2022

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Starchy Roots in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
The recovery of out of home mobility leads retail volume sales to decline
First carbon-neutral potato launched in the UK

PROSPECTS AND OPPORTUNITIES
Retail volume sales projected to decline, driven by potato supply shortages and trend towards low-carb diets
Sustainability set to remain the core of retailers’ focus
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Sugar and Sweeteners in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return to offices triggers decline in retail consumption
Supply issues push up prices despite government efforts

PROSPECTS AND OPPORTUNITIES
Attitudes towards sugar and sweeteners will hinder growth in the long term
Government input to boost awareness likely to help reduce sugar consumption

Summary 9 - Major Processors of Sugar and Sweeteners 2022

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Vegetables in the United Kingdom

KEY DATA FINDINGS

2022 DEVELOPMENTS
Retail volume sales decline as demand switches back to the foodservice and institutional channels
Adverse weather conditions and inflationary pressure challenge supply of vegetables

PROSPECTS AND OPPORTUNITIES
Outlook remains positive, driven by the versatility and health credentials of vegetables
Sustainability concerns drive retailers’ response

Summary 10 - Major Processors of Vegetables 2022

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