Euromonitor International

Staple Foods in the United Kingdom

December 2025

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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

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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

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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

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Processed Fruit and Vegetables in the United Kingdom

KEY DATA FINDINGS

2025 DEVELOPMENTS

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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
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CHANNELS

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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
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CHANNELS

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Omnichannel retailing gains pace

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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

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