



**Euromonitor
International**

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

December 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

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in the United Kingdom - Industry Overview

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

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