



# Fresh Food in the United Kingdom

December 2025

Table of Contents

## Fresh Food in the United Kingdom

### EXECUTIVE SUMMARY

Fresh food sees solid growth in 2025 despite headwinds

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Fresh food sales influenced by economic pressures and health concerns in 2025

Financial pressures push consumers to favour cheaper alternatives

Despite supply pressures demand for many fresh foods remains strong

#### WHAT'S NEXT?

Positive outlook for the UK's fresh food market

Healthy eating campaigns should benefit fresh food sales

Sustainability a growing concern

#### CHANNELS

Supermarkets, hypermarkets and discounters dominate sales of fresh food

Sustainability adds value to the market

#### MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Eggs in the United Kingdom

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Eggs remains a popular staple

#### INDUSTRY PERFORMANCE

Sales of eggs rise with free-range and organic options driving value gains

Sustainability, innovation and affordability shaping the evolving eggs market

#### WHAT'S NEXT?

Affordability, animal welfare and premiumisation set to influence the market for eggs

Innovation and storytelling driving the next wave of premium value in eggs

Summary 2 - Major Processors of Eggs 2025

## CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2020-2025

Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025

Table 17 - Retail Sales of Eggs: Volume 2020-2025

Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025

Table 19 - Retail Sales of Eggs: Value 2020-2025

Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025

Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030

Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030

Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Fish and Seafood in the United Kingdom](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Rising prices push fish and seafood out of the reach of some households

### INDUSTRY PERFORMANCE

Fish and seafood sales struggle amid cost-of-living pressures

Sustainability and provenance sustain the appeal of premium seafood

### WHAT'S NEXT?

High costs and supply limits shape the outlook for fish and seafood

Balancing affordability and sustainability will become key to success

Summary 3 - Major Processors of Fish and Seafood 2025

## CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Fruits in the United Kingdom](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Sales of fruits post growth in 2025 thanks to the category's healthy image

### INDUSTRY PERFORMANCE

Health concerns, convenience, and retail support drive growth in fruits in 2025

Strawberry surplus drives UK fruit retail, while premium and imports face pressure

### WHAT'S NEXT?

Value growth set to be driven by health concerns, premiumisation, and local sourcing

Creative branding and innovation can propel UK fresh fruit beyond commodity status

Summary 4 - Major Processors of Fruits 2025

### CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

[Meat in the United Kingdom](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Price rises put pressure on demand for beef and lamb

### INDUSTRY PERFORMANCE

Poultry gains share as beef and lamb sales suffer due to price increases

Processed meat retains its appeal amid price sensitivity and convenience

### WHAT'S NEXT?

Gradual recovery expected with poultry remaining key to growth

Online butcher services and imports set to reshape the availability of meat in the UK

Summary 5 - Major Processors of Meat 2025

### CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

- Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030
- Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030
- Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030
- Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030
- Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030
- Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Nuts in the United Kingdom](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Nuts grow in popularity as a healthy and versatile food choice

#### INDUSTRY PERFORMANCE

Focus on healthy eating habits fuels demand for nuts

Competition from processed nut mixes persists but demand for versatile, clean label options remains robust

#### WHAT'S NEXT?

HFSS exemption set to boost sales through increased visibility

Unprocessed nuts strengthen appeal as demand for natural snacks grows

[Summary 6 - Major Processors of Nuts 2025](#)

### CATEGORY DATA

- Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025
- Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025
- Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025
- Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025
- Table 71 - Retail Sales of Nuts by Category: Value 2020-2025
- Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025
- Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025
- Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030
- Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030
- Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030
- Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030
- Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030
- Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Pulses in the United Kingdom](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Pulses proving popular as a healthy, affordable and sustainable ingredient

#### INDUSTRY PERFORMANCE

Beans is the key growth driver as consumers make healthier choices

Ready-to-eat shelf stable variants challenge sales of fresh pulses

#### WHAT'S NEXT?

Public campaigns aim to boost the consumption of beans

New UK varieties of beans support climate resilience and soil health

Summary 7 - Major Processors of Pulses 2025

#### CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025

Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025

Table 84 - Retail Sales of Pulses by Category: Value 2020-2025

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

[Starchy Roots in the United Kingdom](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Potatoes props up the market with a healthy, versatile and affordable offering

##### INDUSTRY PERFORMANCE

Potatoes driving growth as prices stabilise and home cooking trend boosts sales

Competition from frozen processed potatoes persists amid demand for convenience

##### WHAT'S NEXT?

Weather volatility and irrigation costs put pressure on potato producers

New potato varieties and regenerative farming aim to cut costs

Summary 8 - Major Processors of Starchy Roots 2025

#### CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025

Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025

Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025

Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030

Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030

Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030

Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030

Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030

Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in the United Kingdom](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Health concerns continue to eat away at sales of sugar

### INDUSTRY PERFORMANCE

Natural sweeteners gain ground as consumers reduce their sugar intake

Cost pressures push households towards private label and bulk sugar options

### WHAT'S NEXT?

Health policies and reformulation targets set to drive continued decline in sugar sales

Premiumisation emerges as provenance and wellness claims reshape sweeteners

Summary 9 - Major Processors of Sugar and Sweeteners 2025

### CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

[Vegetables in the United Kingdom](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Focus on home cooking and healthy eating boosts sales of vegetables in 2025

### INDUSTRY PERFORMANCE

Home cooking gains traction boosting sales of fresh vegetables

Erratic weather conditions impact the production of cucumbers and carrots

### WHAT'S NEXT?

Removal of border checks cuts costs while sustainability remains a pressing concern

Campaigns and loyalty schemes aim to boost the intake of vegetables

Summary 10 - Major Processors of Vegetables 2025

### CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030

Table 131 - Forecast Retail Sales of Vegetables 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/fresh-food-in-the-united-kingdom/report](http://www.euromonitor.com/fresh-food-in-the-united-kingdom/report).