



# Processed Fruit and Vegetables in the United Kingdom

December 2025

## Processed Fruit and Vegetables in the United Kingdom - Category analysis

### 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 1 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 2 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

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Table 12 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

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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

Table 13 - Sales of Staple Foods by Category: Volume 2020-2025

Table 14 - Sales of Staple Foods by Category: Value 2020-2025

Table 15 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

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Table 17 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 18 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 19 - Penetration of Private Label by Category: % Value 2020-2025

Table 20 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 23 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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