



# Processed Fruit and Vegetables in India

January 2026

Table of Contents

## Processed Fruit and Vegetables in India - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Convenience is a key advantage amidst a consumer preference for fresh food

#### INDUSTRY PERFORMANCE

High convenience for hectic lifestyles underpins the consumer interest in processed fruit and vegetables

Developments add dynamism to the retail and foodservice offer

#### WHAT'S NEXT?

Shelf stable fruit and vegetables to remain hampered by limited availability and low awareness

Players to leverage more affordable packs to encourage consumer trials

Economic improvements and government initiatives to stimulate demand while growing health consciousness may hamper the frequency of consumption

#### COMPETITIVE LANDSCAPE

McCain Foods India enjoys a clear lead with a strong product portfolio and widespread distribution

Del Monte and Safal foster interest in shelf stable fruit and frozen processed vegetables, respectively

#### CHANNELS

Large modern grocery retailers gain on small local grocers

E-commerce fits well with the convenience appeal of processed fruit and vegetables

#### 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

Table 3 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 5 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 6 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 7 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 8 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 9 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 10 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 11 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

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

#### COUNTRY REPORTS DISCLAIMER

## Staple Foods in India - Industry Overview

### EXECUTIVE SUMMARY

Rice remains central to staple foods' performance

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Convenience is a consumption driver

Consumers look for nutritional value

Pursuit of wellness covers a myriad of aspects in staple foods

#### WHAT'S NEXT?

Further fast retail value growth projected for staple foods

Modern channels to increase the pressure on small local grocers  
Government regulations to improve transparency and affordability

## COMPETITIVE LANDSCAPE

The competitive landscape remains highly fragmented  
Health consciousness increases the focus on brands offering quality, transparency and minimal processing

## CHANNELS

Small local grocers enjoy unmatched last-mile connectivity  
Large modern grocery retailers and e-commerce increase their weight in staple foods distribution

## 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  
Table 16 - Sales of Staple Foods by Category: % Value Growth 2020-2025  
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

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## 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/processed-fruit-and-vegetables-in-india/report](http://www.euromonitor.com/processed-fruit-and-vegetables-in-india/report).