



Staple Foods in Ireland

November 2025

Table of Contents

Staple Foods in Ireland

EXECUTIVE SUMMARY

Demand for value, health and sustainability drive growth in staple foods

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising demand for value, convenience and healthier options drive growth in 2025

Sustainability becomes an influential driver of consumer choice in staple foods

Rising costs influence purchasing behaviour as Irish consumers balance value with quality

WHAT'S NEXT?

Value sales are expected to rise as price inflation and shifting lifestyle priorities shape demand

Reformulation, value innovation and sustainability are set to define competitive strategies

Retail e-commerce and discounters are expected to gain momentum

COMPETITIVE LANDSCAPE

Pilgrim's Europe maintains its leadership through broad availability and diversified offerings

Tesco Ireland strengthens its position through private label expansion and a multi-tiered value strategy

CHANNELS

Supermarkets retains its lead through strong brand loyalty and a wide product assortments

Retail e-commerce accelerates as rapid delivery and improved fulfilment services reshape staple foods

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Ireland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth for baked goods is driven by convenience, premium flavours and the expansion of retail e-commerce

INDUSTRY PERFORMANCE

Baked goods achieve value growth as consumers shift towards convenient formats and premium flavour innovations

Cakes lead value growth while flatbreads and artisanal loaves sustain momentum through versatility and heritage appeal

WHAT'S NEXT?

Baked goods is set for modest growth as artisanal products and private label ranges drive competitive shifts
Health and wellness trends will accelerate clean-label and free-from innovation across the forecast period
Sustainability will gain prominence as local sourcing and packaging reduction shape baked goods

COMPETITIVE LANDSCAPE

Brennan's Bakeries maintains its leadership through brand strength and health-focused innovation
Promise Gluten Free leads growth in 2025 through innovation in free-from and health focused baked goods

CHANNELS

Supermarkets retains its lead of distribution, supported by Tesco, Dunnes and SuperValu
The rising adoption of home delivery and click-and-collect supports growth for retail e-commerce

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Ireland](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals in Ireland is driven by health innovation, convenience and retail e-commerce

INDUSTRY PERFORMANCE

Breakfast cereals maintains value growth through health-focused innovation and stable household penetration
Hot cereals drive value growth in 2025 as oats benefit from health, affordability and provenance

WHAT'S NEXT?

Breakfast cereals is expected to record steady growth as health-led innovation and private label shape the category
Health and wellness is set to drive innovation with natural, high-fibre and clean label products
Demand for locally produced products is expected to accelerate amid sustainability concerns

COMPETITIVE LANDSCAPE

Kellogg Co of Ireland Ltd retains its lead through a broad portfolio and wide distribution
The Happy Pear Living Foods leads growth through natural and health-focused breakfast cereals in 2025

CHANNELS

Supermarkets remains dominate through a broad range of branded and private label goods
Online subscriptions support rising growth for retail e-commerce

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Ireland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Processed fruit and vegetables gain momentum through convenience and affordability

INDUSTRY PERFORMANCE

Processed fruit and vegetables record value growth in 2025 supported by affordability and versatility

Frozen vegetables drive growth through convenience, long shelf life, and nutrient-preserving formats

WHAT'S NEXT?

Processed fruit and vegetables are expected to grow as convenience, batch cooking, and cost-effective formats drive demand

Natural and minimally processed products are set to drive growth as health-conscious consumers seek clean label options

Sustainability commitments will strengthen brand credibility as consumers prioritise environmental responsibility

COMPETITIVE LANDSCAPE

Valeo Foods retains its leadership amid rising competition from McCain Foods Ltd

Windmill Organic leads growth as consumers seek organic, plant-based pantry staples

CHANNELS

Supermarkets maintains its lead through wide product ranges and promotional support

Discounters drives growth in processed fruit and vegetables through competitively priced private label ranges

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in Ireland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth for processed meat, seafood and alternatives to meat is driven through convenience and health

INDUSTRY PERFORMANCE

Processed meat, seafood and alternatives to meat record value growth, driven by convenience and familiar flavours

Meat and seafood substitutes lead value growth as flexitarian diets rise

WHAT'S NEXT?

Growth is set to be driven by convenience, protein and plant-based options

Health and wellness will drive innovation in processed meat, seafood and alternatives to meat

Sustainability and provenance is expected to influence consumer choice over the forecast period

COMPETITIVE LANDSCAPE

Pilgrim's Europe maintains its leadership through portfolio breadth and promotional activity in 2025

Aldi Ireland and Strong Roots drive dynamic growth in processed meat, seafood and alternatives to meat

CHANNELS

Supermarkets remains the primary distribution channel despite a slight share loss in 2025

Convenience and the ongoing adoption of home delivery supports growth for retail e-commerce

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Ireland](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value growth is driven by convenience, health trends, and premiumisation in Ireland

INDUSTRY PERFORMANCE

Value sales of rice, pasta and noodles rise in Ireland, driven by convenience, health trends and premium imports

Rice leads value growth in Ireland driven by premium, convenient, and health-focused offerings

WHAT'S NEXT?

Rice, pasta and noodles is expected to grow due to convenience, versatility, and lifestyle trends

Health focused innovations are set to drive value growth in rice, pasta and noodles

Rising interest in international cuisines will drive innovation in rice, pasta and noodles

COMPETITIVE LANDSCAPE

Established brands consolidate the leadership through strong heritage and broad coverage

Convenience-led innovation and strong online availability positions Veetee as the fastest-growing player in 2025

CHANNELS

Supermarkets retains its leadership through broad assortments and private label goods

Discounters and retail e-commerce drive growth as value-seeking behaviour and convenience influence purchasing

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-ireland/report.