



Euromonitor
International

Staple Foods: Winners and Losers from Ultra-Processed Food Concern

December 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Ultra-processed foods are everywhere

The Nova classification

Key examples of the ultra-processed food (and drink) landscape

East-West UPF split is apparent

Most UPFs in the diet come from staple foods

Growth in UPFs is continuing

UPF affordability is not the issue

Build high taxation into forecasts/planning now

Beyond Nova: WHO advice and USDA/FDA definition incoming

Beyond Nova: Apps offer quick – but differing – judgments

PROCESSED FOOD CONCERN

Over one in four globally now avoid processed foods...

...and doing so is seen as key to improving diet

Cooking reluctance is growing, however

Labelling regulation looms

Texas enacts “not recommended for human consumption” warnings

Ingredient preferences indicate specifics

Aim for parents with "natural" staple foods

Industry emphasises simplicity and importance of processing

New processing techniques will be necessary – as will justifications

Benefits will need to meet more claims in the clean label era

Reformulation hits artificial colours, sweeteners and bulking agents

STAPLE FOODS: WINNERS AND LOSERS

Winning and losing through consumer perception

Bread variations mean a mixed picture for baked goods

Breakfast cereals continue to face increasing health scepticism

Position in opposition to reach concerned consumers

M&S launches (ultra) low ingredient cereals

Processed fruit and vegetables see benefit

Abel & Cole emphasises no “nasty stuff”

Mixed picture for processed meat and seafood

Meat and seafood substitutes face harsh criticism

Vivera moves into "Protein Bites"

Rice, pasta and noodles are seen as healthier than many others

WHAT THE FUTURE HOLDS

Staple foods: The overall size of the prize

Growth to come through natural and organic variants

Healthy growth for staple foods that meet clean label concerns

Awareness raising need not be a priority – or a drain on resources

The Colombian experience suggests reformulation in future

CONCLUSION

Recommendations/opportunities for growth

Evolution of processed food concern

Questions we are asking

APPENDIX

Appendix: Full Nova definition of UPFs

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-winners-and-losers-from-ultra-processed-food-concern/report.