

Fresh Food in the United Kingdom

December 2024

Table of Contents

Fresh Food in the United Kingdom

EXECUTIVE SUMMARY

Fresh food in 2024: The big picture 2024 key trends Retailing developments What next for fresh food?

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2019-2024Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2019-2024Table 3 - Retail Sales of Fresh Food by Category: Volume 2019-2024Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2019-2024Table 5 - Retail Sales of Fresh Food by Category: Value 2019-2024Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2019-2024Table 7 - Retail Sales of Fresh Food by Category: % Value Growth 2019-2024Table 8 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2019-2024Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2024-2029Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2024-2029Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2024-2029Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2024-2029Table 13 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2024-2029Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price inflation slows, leading to recovery in retail volume sales of eggs Rebranding efforts and eggs offering specific value evident in retailers

PROSPECTS AND OPPORTUNITIES

Sustainability commitments set to be met, creating opportunities for brands Greater resilience expected from investments in avian flu security Summary 2 - Major Processors of Eggs 2024

CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2019-2024Table 16 - Total Sales of Eggs: % Total Volume Growth 2019-2024Table 17 - Retail Sales of Eggs: Volume 2019-2024Table 18 - Retail Sales of Eggs: % Volume Growth 2019-2024Table 19 - Retail Sales of Eggs: Value 2019-2024Table 20 - Retail Sales of Eggs: % Value Growth 2019-2024Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2019-2024Table 22 - Forecast Total Sales of Eggs: Total Volume 2024-2029Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2024-2029Table 24 - Forecast Retail Sales of Eggs: Volume 2024-2029Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2024-2029

Table 26 - Forecast Retail Sales of Eggs: Value 2024-2029Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2024-2029

Fish and Seafood in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fish and seafood sales rise following the easing of inflationary pressures Foodservice sales continue to recover but competition remains strong

PROSPECTS AND OPPORTUNITIES

Growth to stagnate as competition with convenient food options intensifies Addressing health and sustainability concerns can boost future growth Summary 3 - Major Processors of Fish and Seafood 2024

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2019-2024Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2019-2024Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2019-2024Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2019-2024Table 32 - Retail Sales of Fish and Seafood by Category: Value 2019-2024Table 33 - Retail Sales of Fish and Seafood by Category: Value 2019-2024Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2019-2024Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2019-2024Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2024-2029Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2024-2029Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2024-2029Table 38 - Forecast Retail Sales of Fish and Seafood by Category: Wolume Growth 2024-2029Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Wolume Growth 2024-2029Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Wolume Growth 2024-2029Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Wolume Growth 2024-2029Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2024-2029Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2024-2029Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2024-2029

Fruits in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for fruits remains weak due to further price increases Good harvest of berries boosts value sales, while climate challenges could still provide other opportunities

PROSPECTS AND OPPORTUNITIES

Adding specific value expected to boost the offer from local retailers Fruit consumption reliant on education and wide product range Summary 4 - Major Processors of Fruits 2024

CATEGORY DATA

- Table 41 Total Sales of Fruits by Category: Total Volume 2019-2024
- Table 42 Total Sales of Fruits by Category: % Total Volume Growth 2019-2024
- Table 43 Retail Sales of Fruits by Category: Volume 2019-2024
- Table 44 Retail Sales of Fruits by Category: % Volume Growth 2019-2024
- Table 45 Retail Sales of Fruits by Category: Value 2019-2024
- Table 46 Retail Sales of Fruits by Category: % Value Growth 2019-2024
- Table 47 Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2019-2024
- Table 48 Forecast Total Sales of Fruits by Category: Total Volume 2024-2029
- Table 49 Forecast Total Sales of Fruits by Category: % Total Volume Growth 2024-2029

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2024-2029Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2024-2029Table 52 - Forecast Retail Sales of Fruits by Category: Value 2024-2029Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2024-2029

Meat in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Total meat sales rebound but price of lamb accelerates Competition with foodservice and processed meat intensifies as consumers choose convenience

PROSPECTS AND OPPORTUNITIES

Meat sales are set to maintain growth yet challenges will persist Sustainability claims to expand as environmental concerns increase Summary 5 - Major Processors of Meat 2024

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2019-2024Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2019-2024Table 56 - Retail Sales of Meat by Category: Volume 2019-2024Table 57 - Retail Sales of Meat by Category: % Volume Growth 2019-2024Table 58 - Retail Sales of Meat by Category: Value 2019-2024Table 59 - Retail Sales of Meat by Category: % Value Growth 2019-2024Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2019-2024Table 61 - Forecast Sales of Meat by Category: Total Volume 2024-2029Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2024-2029Table 63 - Forecast Retail Sales of Meat by Category: Volume 2024-2029Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2024-2029Table 65 - Forecast Retail Sales of Meat by Category: % Volume 2024-2029

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2024-2029

Nuts in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stable demand for nuts in the UK despite production challenges Healthier snacking trends drive category's resilience

PROSPECTS AND OPPORTUNITIES

Legislation and health trends are set to drive further growth of nuts Local production and provenance trend could provide new opportunities Summary 6 - Major Processors of Nuts 2024

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2019-2024
Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2019-2024
Table 69 - Retail Sales of Nuts by Category: Volume 2019-2024
Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2019-2024
Table 71 - Retail Sales of Nuts by Category: Value 2019-2024
Table 72 - Retail Sales of Nuts by Category: % Value Growth 2019-2024
Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2019-2024

- Table 74 Forecast Total Sales of Nuts by Category: Total Volume 2024-2029
- Table 75 Forecast Total Sales of Nuts by Category: % Total Volume Growth 2024-2029
- Table 76 Forecast Retail Sales of Nuts by Category: Volume 2024-2029
- Table 77 Forecast Retail Sales of Nuts by Category: % Volume Growth 2024-2029
- Table 78 Forecast Retail Sales of Nuts by Category: Value 2024-2029
- Table 79 Forecast Retail Sales of Nuts by Category: % Value Growth 2024-2029

Pulses in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasing consumer interest in health and sustainability drives sales of pulses Ready-to-eat formats create strong competition for pulses driven by increasing demand for convenience

PROSPECTS AND OPPORTUNITIES

Local pulses face potential challenges due to adverse weather conditions Rising acceptance of pulses among younger generations driven by increasing popularity of vegan and vegetarian diets Summary 7 - Major Processors of Pulses 2024

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2019-2024
Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2019-2024
Table 82 - Retail Sales of Pulses by Category: Volume 2019-2024
Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2019-2024
Table 84 - Retail Sales of Pulses by Category: Value 2019-2024
Table 85 - Retail Sales of Pulses by Category: % Value Growth 2019-2024
Table 86 - Retail Sales of Pulses by Category: % Value Growth 2019-2024
Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2019-2024
Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2024-2029
Table 88 - Forecast Total Sales of Pulses by Category: Wolume 2024-2029
Table 89 - Forecast Retail Sales of Pulses by Category: Wolume Growth 2024-2029
Table 90 - Forecast Retail Sales of Pulses by Category: Wolume Growth 2024-2029
Table 91 - Forecast Retail Sales of Pulses by Category: Value 2024-2029
Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2024-2029

Starchy Roots in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Persistent inflationary pressures challenge consumption of starchy roots Demand for processed potatoes places additional pressure on fresh variants

PROSPECTS AND OPPORTUNITIES

Retail volume sales will struggle as supply chain shortages are expected to persist "Imperfect" potatoes can help balance the tighter supply Summary 8 - Major Processors of Starchy Roots 2024

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2019-2024
Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2019-2024
Table 95 - Retail Sales of Starchy Roots by Category: Volume 2019-2024
Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2019-2024
Table 97 - Retail Sales of Starchy Roots by Category: Value 2019-2024

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2019-2024Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2019-2024Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2024-2029Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2024-2029Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2024-2029Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2024-2029Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2024-2029Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2024-2029

Sugar and Sweeteners in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Persistent price increases due to challenging weather conditions Demand impacted by health perceptions

PROSPECTS AND OPPORTUNITIES

Future growth set to be hindered by unpredictable climate conditions and regulations Appetite for sugar and sweeteners likely to further decline Summary 9 - Major Processors of Sugar and Sweeteners 2024

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2019-2024 Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2019-2024 Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2019-2024 Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2019-2024 Table 110 - Retail Sales of Sugar and Sweeteners: Value 2019-2024 Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2019-2024 Table 112 - Retail Sales of Sugar and Sweeteners: % Value Growth 2019-2024 Table 112 - Retail Sales of Sugar and Sweeteners: by Packaged vs Unpackaged: % Volume 2019-2024 Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2024-2029 Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2024-2029 Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2024-2029 Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 117 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 117 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 117 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029 Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2024-2029

Vegetables in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Vegetables continues to struggle amid supply shortages Need for convenience shifts demand away from fresh vegetables

PROSPECTS AND OPPORTUNITIES

Return to growth over forecast period but inflationary pressures will persist Climate change threat urges the need for action towards sustainable sourcing Summary 10 - Major Processors of Vegetables 2024

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2019-2024Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2019-2024Table 121 - Retail Sales of Vegetables by Category: Volume 2019-2024

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2019-2024Table 123 - Retail Sales of Vegetables by Category: Value 2019-2024Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2019-2024Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2019-2024Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2024-2029Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2024-2029Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2024-2029Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2024-2029Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2024-2029Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2024-2029

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.