

# Trends driving the Evolving Landscape of Staple Foods

June 2026

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## **Tom Rees**

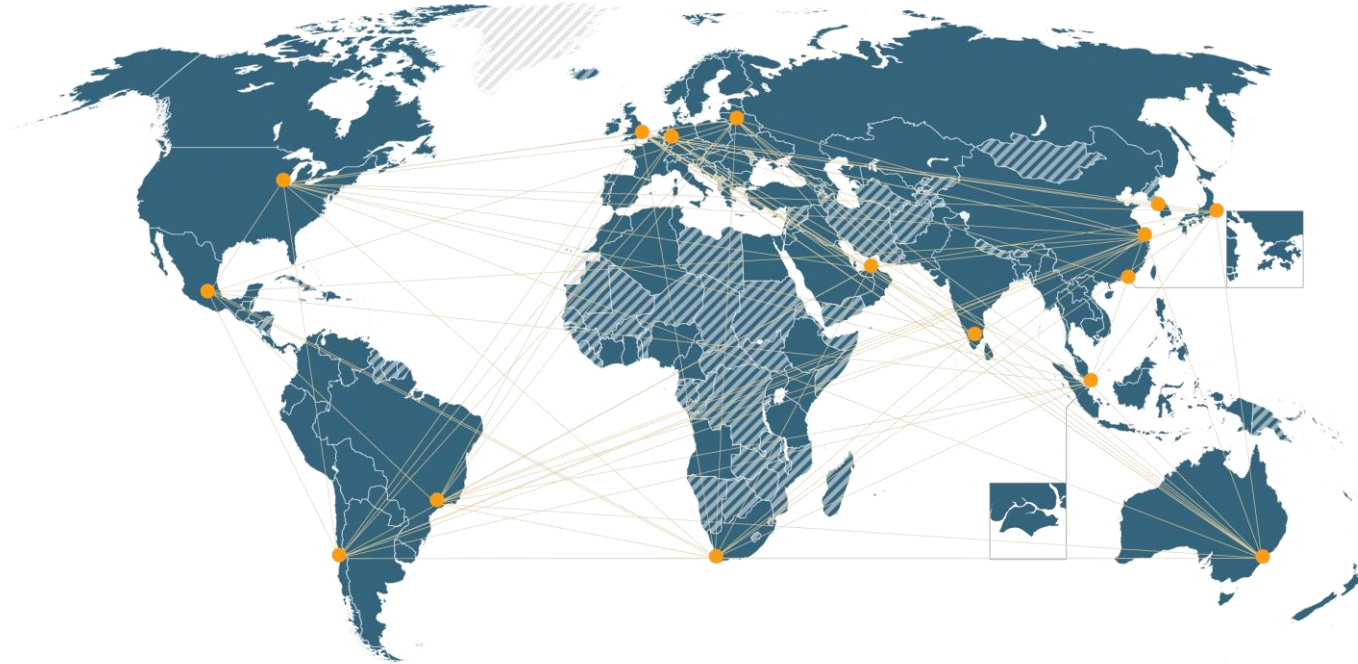
### **Global Insight Manager, Food and Nutrition: Staple Foods**

Tom is a Global Insight Manager at Euromonitor International with a focus on food and nutrition. Based in London, he has 20 years of experience in research.

Tom is responsible for the direction and quality of Euromonitor's content covering Staple Foods and provides global expertise, forward-thinking insights, and identifies key market trends.

Tom advises clients across the food industry and is an in-demand speaker at high-profile events. He provides wide-scope analysis and is the author of publications including *Staple Foods: Winners and Losers from Ultra-Processed Food Concern* and *Will People Eat Cell-Cultured Meat?*

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## **Staple Foods**

In general, Staple Foods refers only to those food items that are sold to the consumer pre-packaged at the point of sale

### **Includes:**

Baked Goods, Breakfast Cereals,  
Processed Fruit and Vegetables,  
Processed Meat, Seafood and  
Alternatives, Rice, Pasta and Noodles

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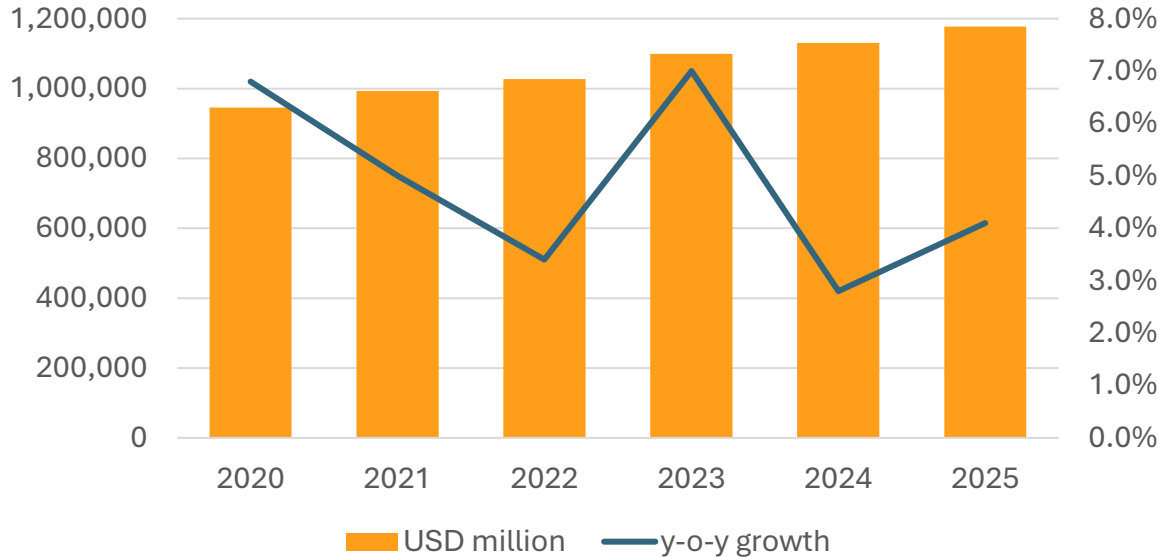


# The Lens of Affordability



# Staple Foods hits USD1.18tn

Global Staple Food Sales Value, 2020-25  
USD million



**293m**  
Total retail **volume** in tonnes  
in 2025

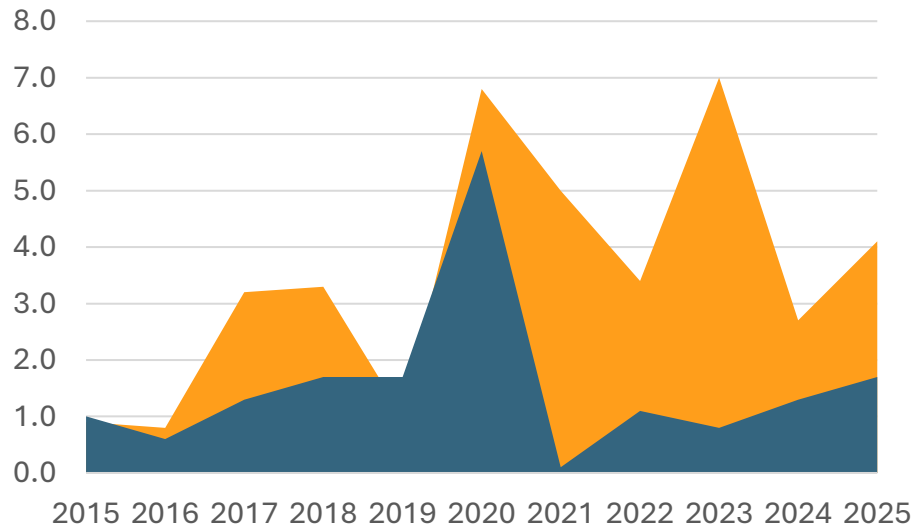
**USD1.18tn**  
Total retail **value**  
in 2025

**+7.0%**  
Year-on-year **growth**  
in 2023

Source: Euromonitor International Staple Foods 2026ed

## Affordability takes top priority

Staple Food Sales Value vs. Volume Growth, 2015-25  
% Change year-on-year






■ Retail value ■ Retail volume

Source: Euromonitor International Staple Foods 2026ed

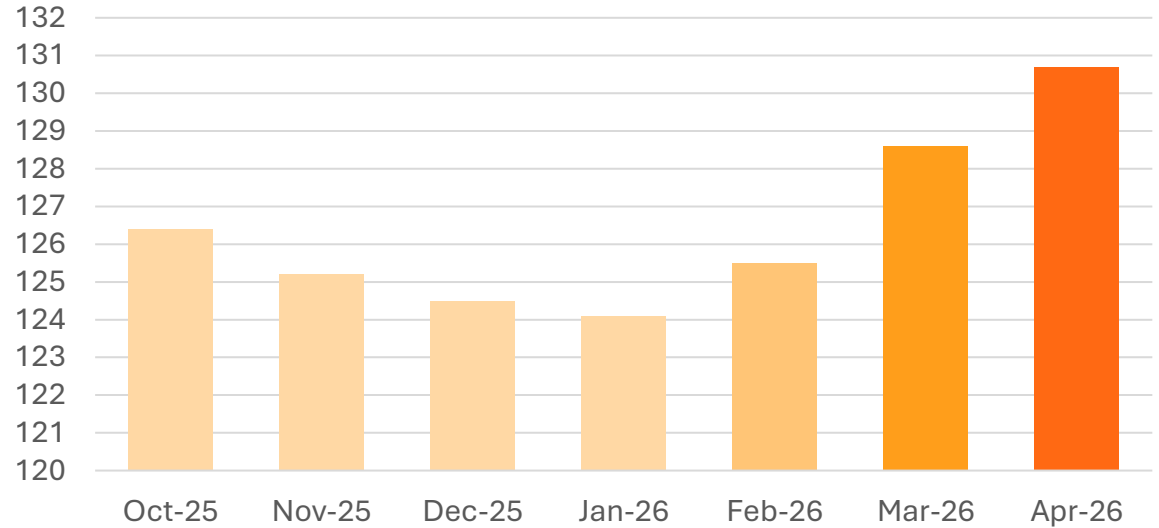
- 2025: value +4.2% y-o-y in current terms vs. volume +1.7%
- 2025: value increase excluding inflation: +1.2%
- Geopolitical instability, protectionist policies and tariffs (and reactions), high energy prices, demand, climate-change driven disruption of key crops and harvests

# FAO: April '26

**FAO Food Price Index extends upward trend amid higher vegetable oil, meat and cereal prices**  
Pressure on fertilizer supplies and elevated energy prices add uncertainty to markets

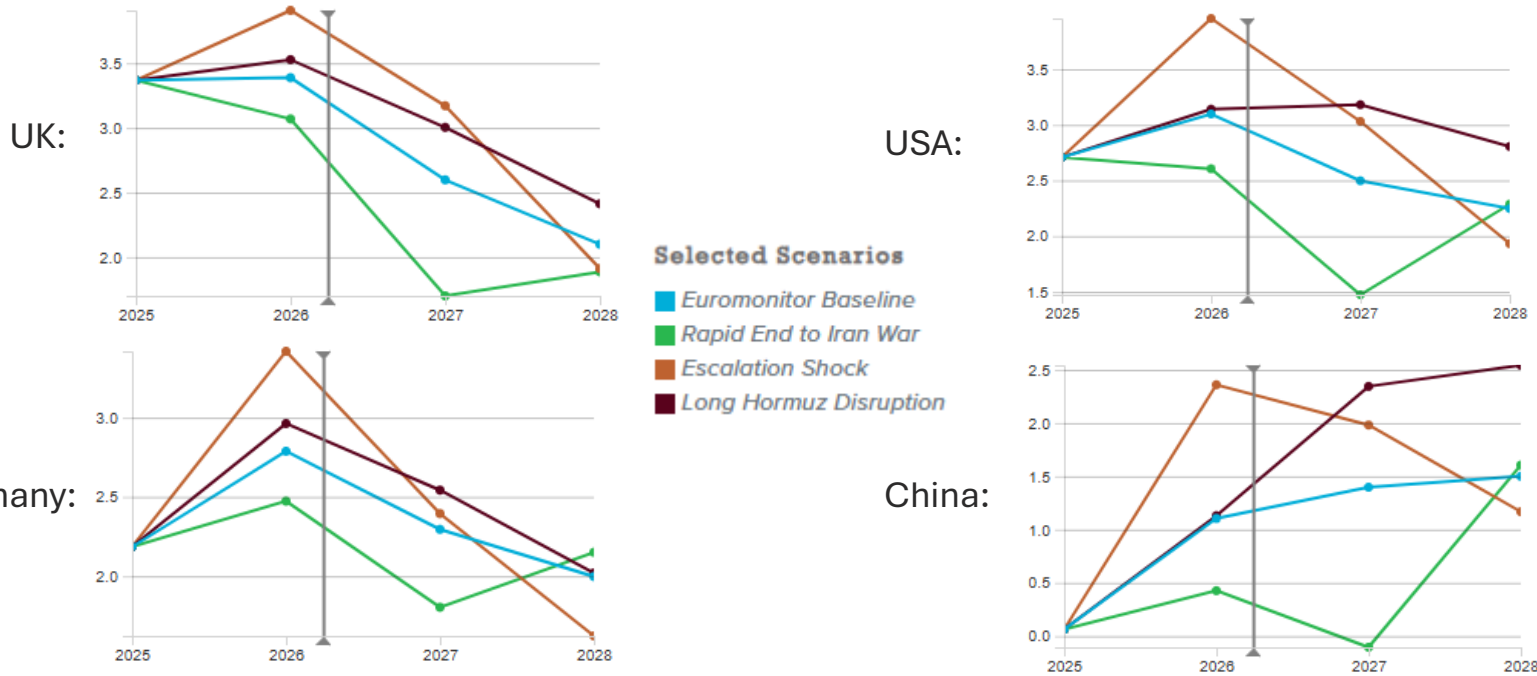
		
Meat up 4.4 points from Oct. 2025	Cereals up 7.5 points from Oct. 2025	Oils up 24.5 points from Oct. 2025

FAO Food Price Index, last seven months (April 2026)  
2014-2016=100



Source: <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

# Inflation on the back of the Iran War



Source: Euromonitor International, *Economies and Consumers 2026ed*

Definitions: The baseline assumes that the US/Israel-Iran war remains contained but unresolved through Q2 2026. Shipping through the Strait of Hormuz remains disrupted through H1 2026, constraining energy and the flow of goods. However, disruption does not escalate materially, and conditions begin to improve from Q3 2026. The Rapid End to Iran War scenario assumes that the war de-escalates quickly in Q2 2026. The Escalation Shock scenario assumes that the war escalates sharply in Q2 2026, causing temporary but material damage to production, export or logistics infrastructure in the Middle East. The Prolonged Hormuz Disruption scenario assumes that the active phase of the war eases, but Gulf maritime trade and energy flows remain disrupted well beyond the baseline.

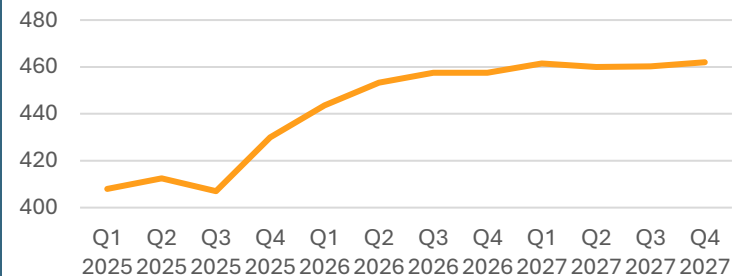
## Global Wheat Price, Q1 2025 - Q4 2027(f)

USD per metric ton



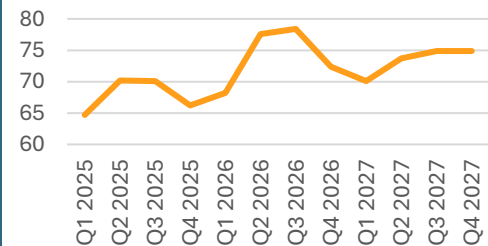
## Global Soybeans Price, Q1 2025 - Q4 2027(f)

USD per metric ton



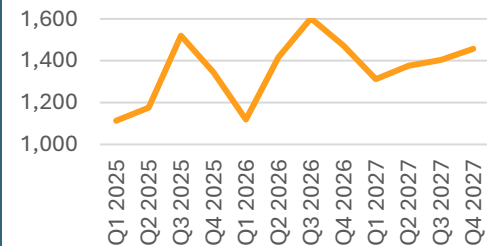
## Global Pork Price, Q1 2025 - Q4 2027(f)

US cents per pound



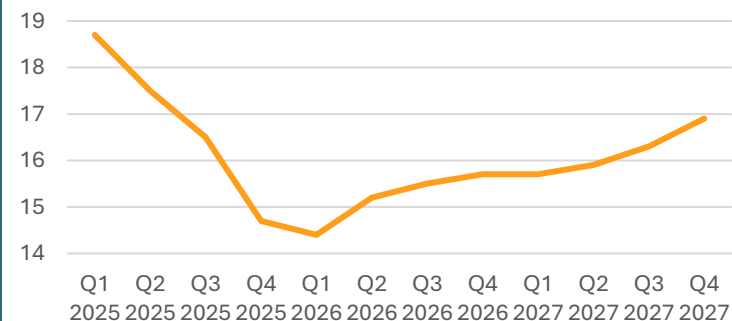
## Global Lemon Price, Q1 2025 - Q4 2027(f)

USD per metric ton



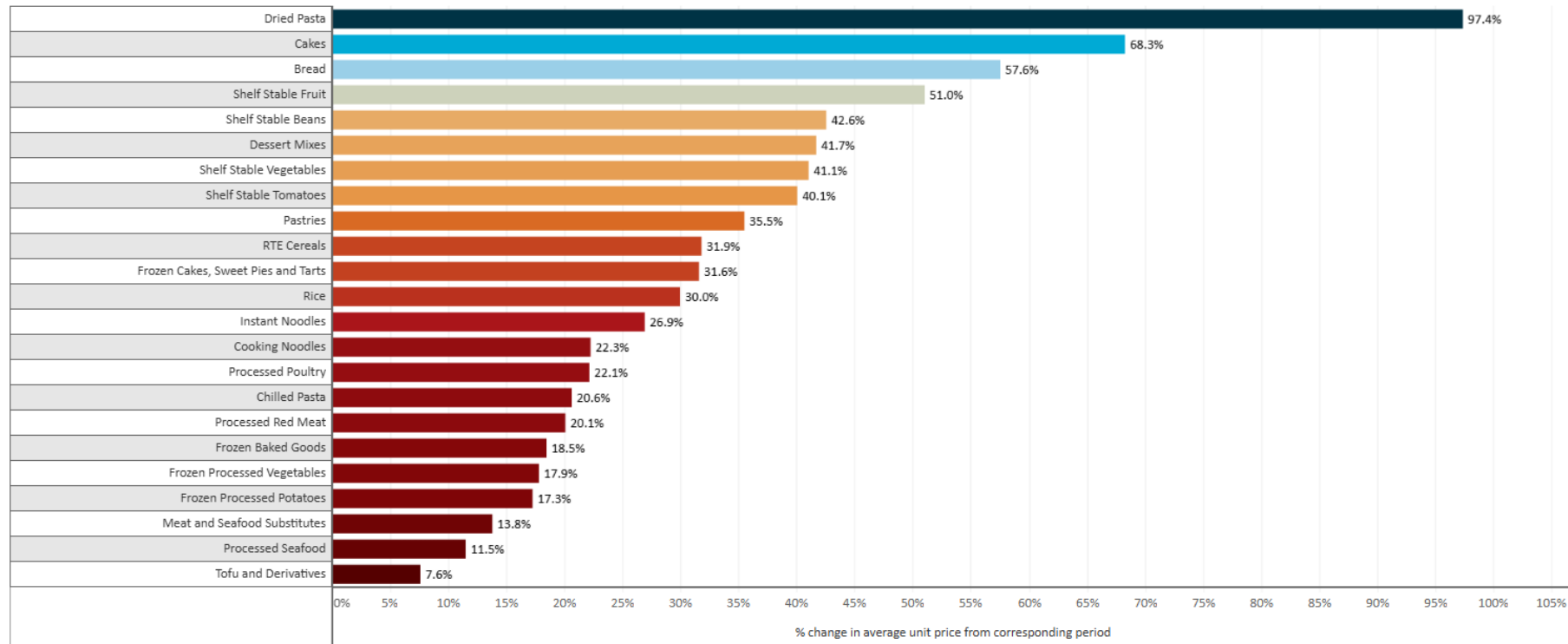
## Global Sugar Price, Q1 2025 - Q4 2027(f)

US cents per pound



# Price rises over last five years (pre-Iran war): Italy

% Change in Average Unit Price from Apr 2021 to Feb 2026

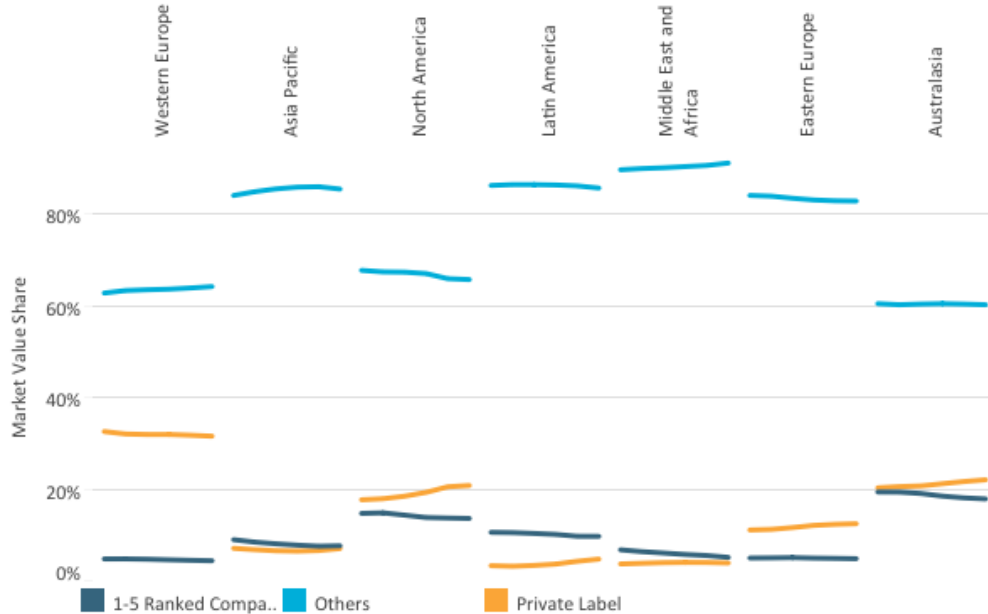


Source: Euromonitor International, Staple Foods price tracker

# Private label surges

## Staple Foods: Market Fragmentation by Region 2020-2025

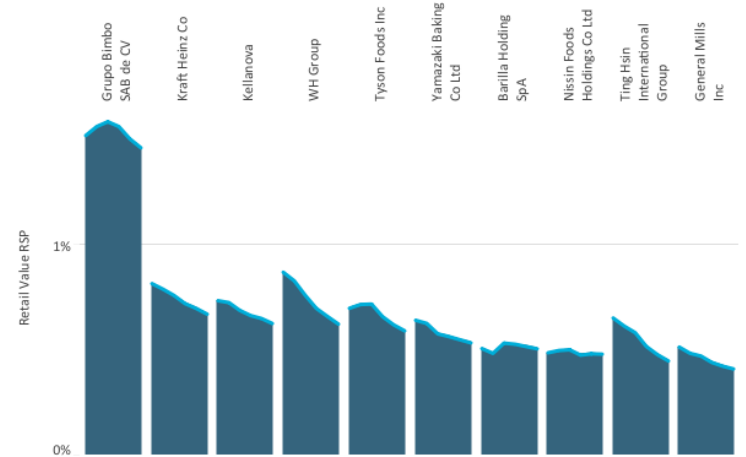
% market value share - USD million



Source: Euromonitor International Staple Foods 2026ed

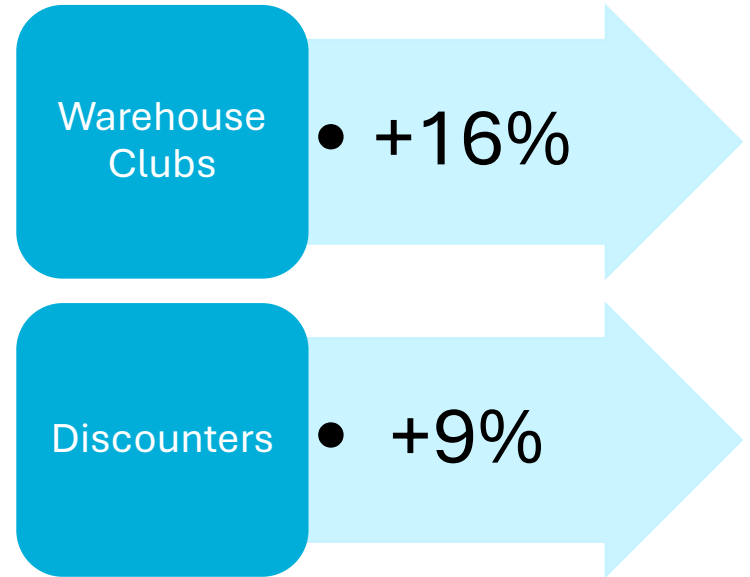
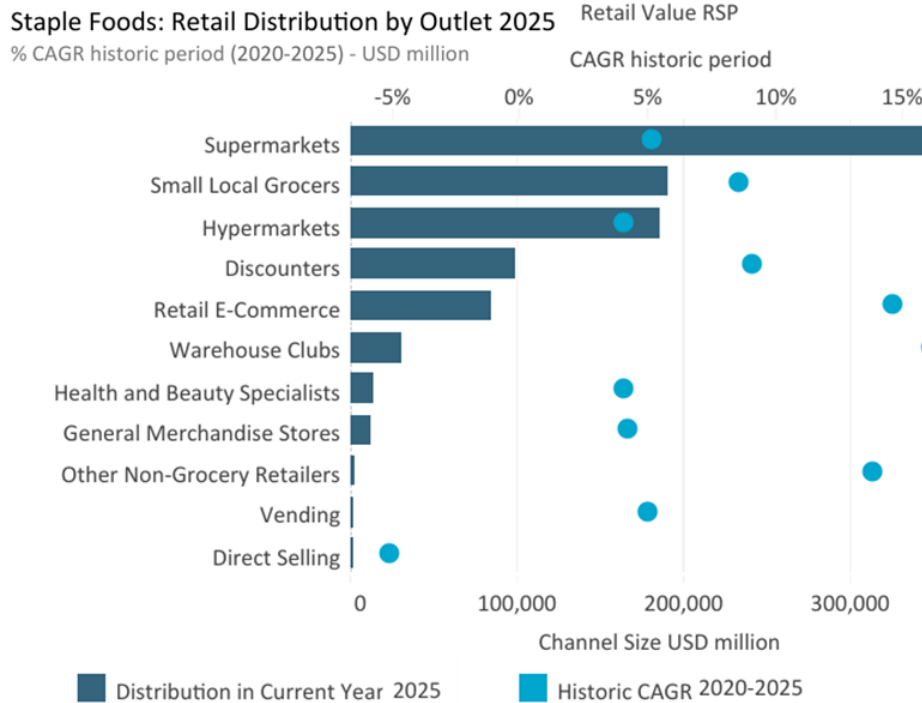
## Staple Foods: Top 10 Companies 2020-2025

% company value share - USD million



Private label takes a larger share than the top five companies in Australasia, Eastern Europe, North America and Western Europe and is growing share in Middle East and Africa and Latin America. In North America it now takes over 20% of the market.

# Channel growth reflects consumer priorities



Source: Euromonitor International Staple Foods 2026ed

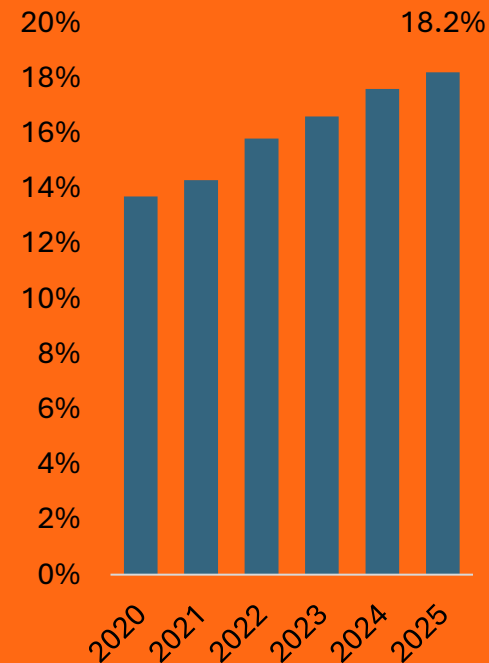


## Penny sets 1,000 stores target for Romania

- Updates a 2025 aim of 400, set in 2014 and met early (417 stores by spring)
- Discounters = second largest channel for staple foods sales in Romania, behind only hypermarkets
- Also increasing private label to 45% turnover by 2028 (currently at 35%)

### Staple Foods Sales Through Discounters in Romania, 2020-2025

% share of retail sales



Source: Euromonitor Passport Staple Foods 2026ed

Image source: <https://www.penny.ro/presa>

# Other Key Trends



Population crunch  
looms

## Other Key Trends

GLP-1 weighs in on  
existing health  
trends

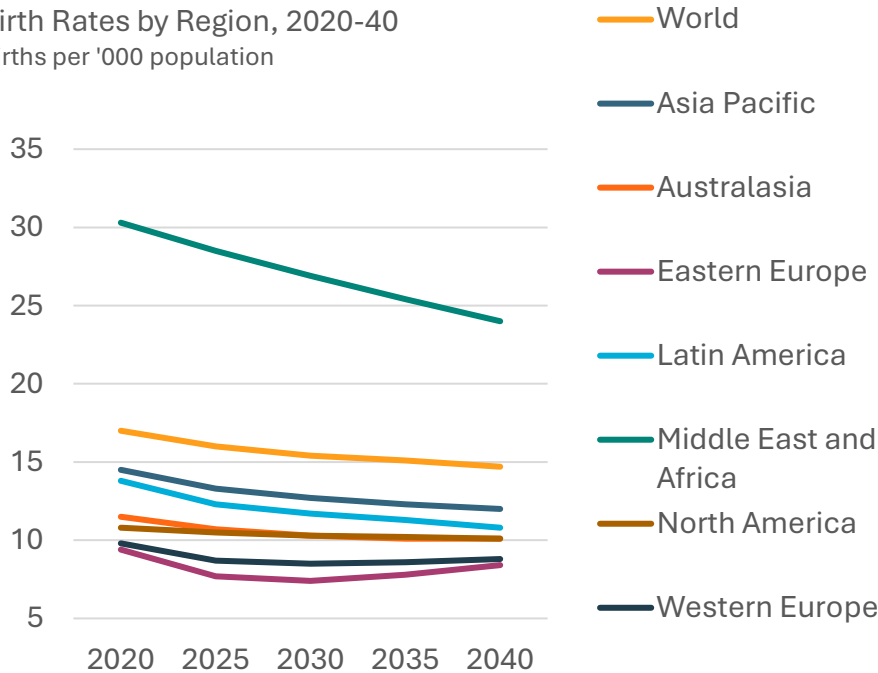
UPF concern,  
protein demand  
persist...

...and evolve, with  
fibre in the mix

Cooking becomes  
less common

# Population crunch ahead

Birth Rates by Region, 2020-40  
Births per '000 population



Source: Euromonitor International Economies and Consumers, 2026ed

Replacement rate (2.1) missed in almost all developed countries

Top example: South Korea. 0.7 children per woman = population halved by 2100

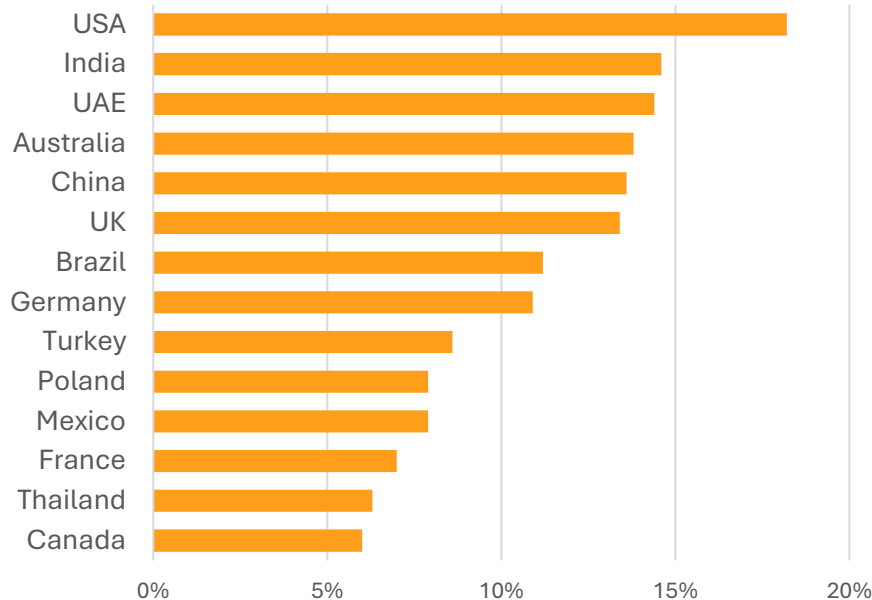
Developing markets also undergoing this trend (but less far along)

Under replacement rate: Brazil, China, India, Mexico and Russia

Fewer humans means fewer calories consumed; child-facing foods will feel effects sooner

## GLP-1 weighs in

Take GLP-1 Medication for Weight Loss, 2026  
% of respondents who are trying to lose weight



Source: Euromonitor International Voice of the Consumer Health and Nutrition survey, 2026 n=10,147

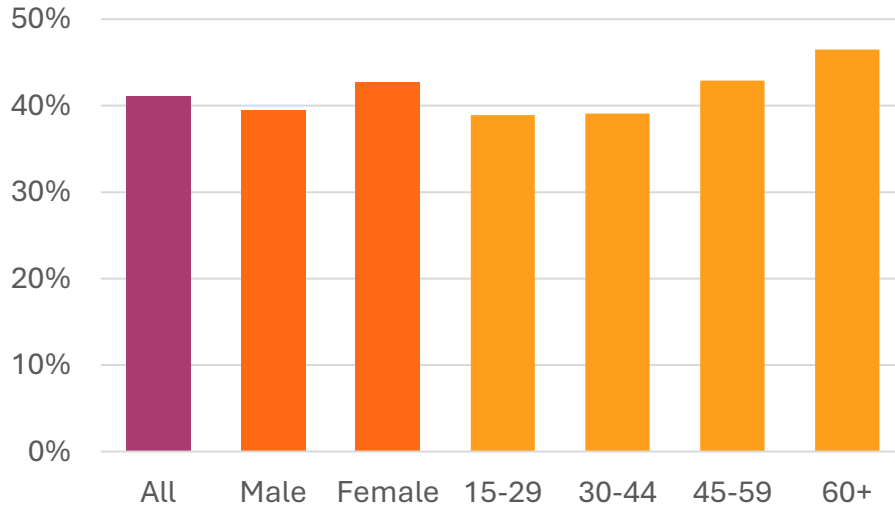
Currently constrained by cost, availability and regulations. But:

- Generics for China, Brazil and India as key patent expires
- Regulations will ease (17.1% of 18+ year-olds obese in 2025)
- Non-injectable formats
- Multi-agonists (target multiple metabolic hormone receptors)
- Investigated for treating Alzheimer's, kidney disease, and alcohol abuse

Alongside affordability and demographics; towards “peak calorie”

## More avoid UPFs...

Consumers Seeking to Improve Eating Habits by Eating "Less Ultra-processed Food", 2026  
% of respondents seeking to improve eating habits



Source: Euromonitor International Voice of the Consumer Health and Nutrition survey, 2026 n=13,846

43% of food purchased is unprocessed or minimally processed

In North America, over half is UPF (55% in the US)

In Western Europe (35%) and Australasia (42%) are UPFs

26.8% try to limit intake of ultra-processed foods

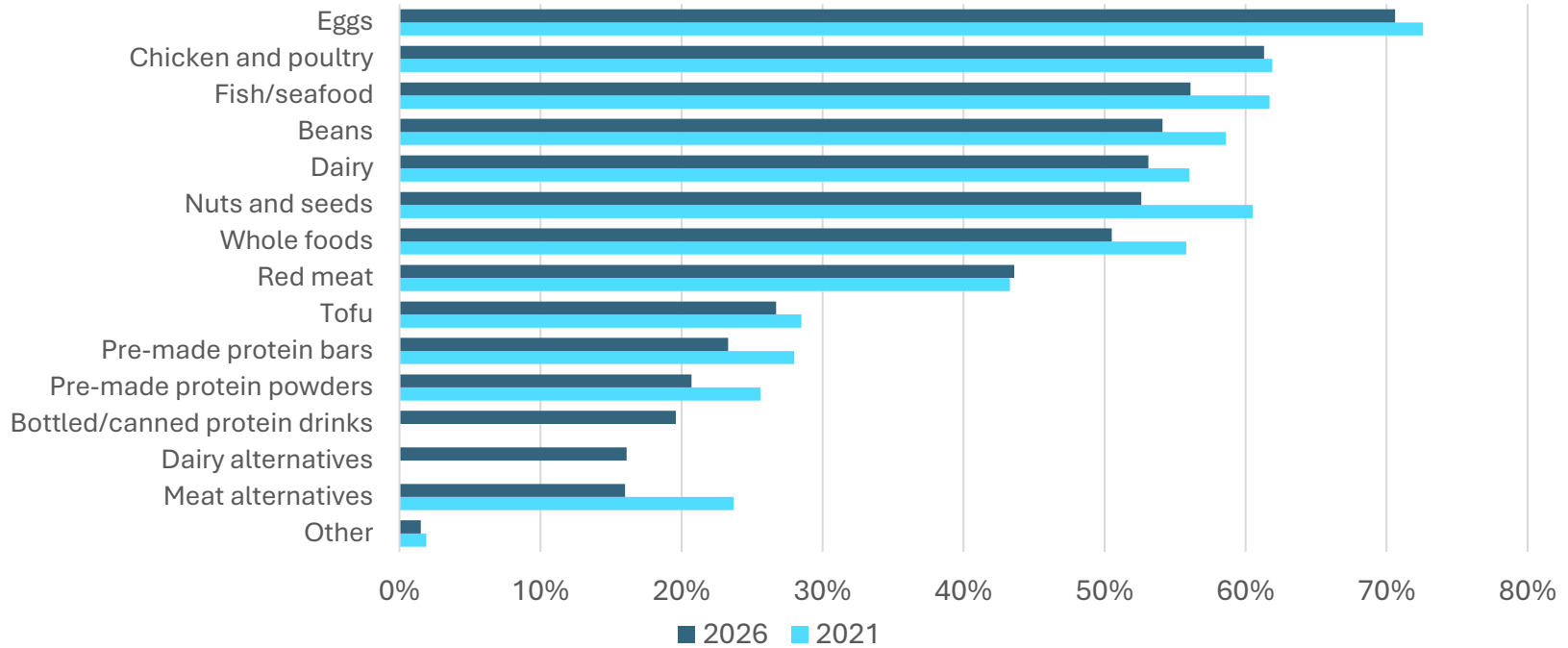
WHO working on consumption guidelines

USDA/FDA working on a unified definition

## ...as protein demand favours “natural” foods

### Preferred Sources of Protein, 2021 & 2026

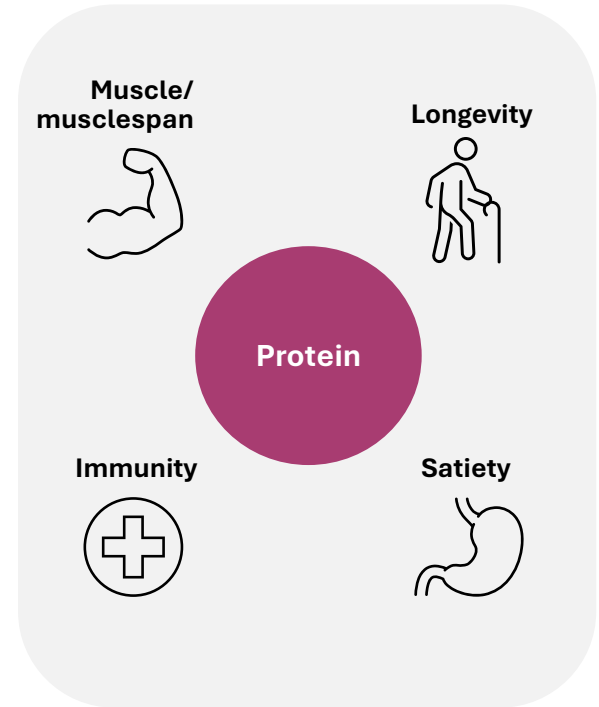
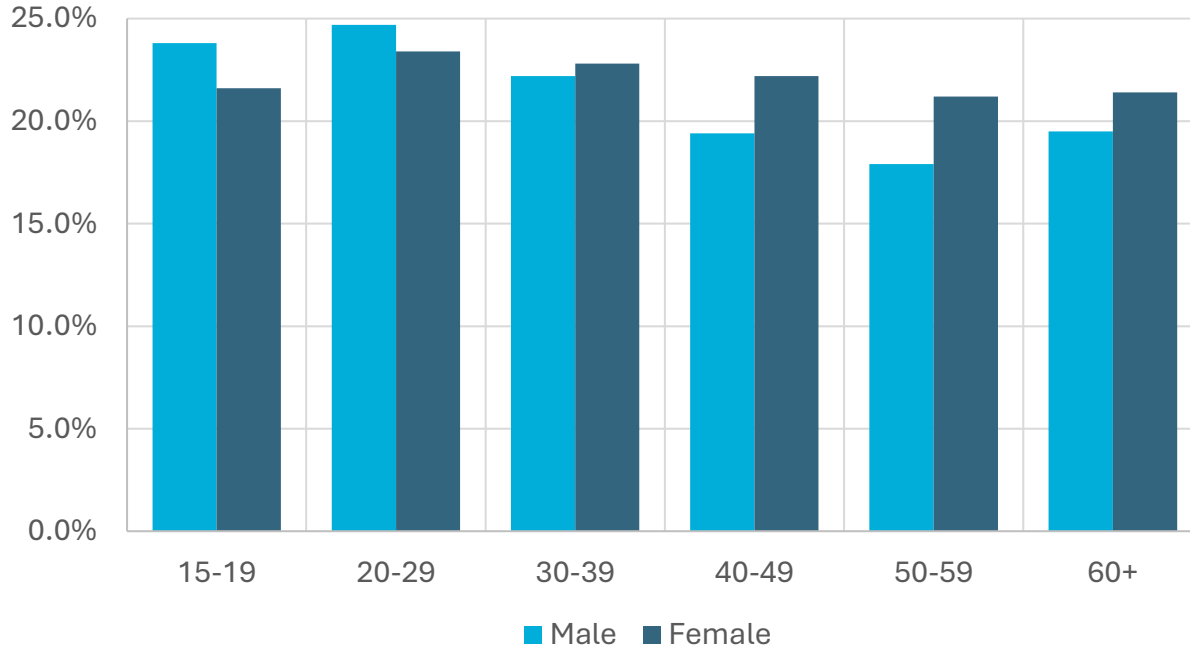
% respondents



Source: Euromonitor International Voice of the Consumer Health and Nutrition Survey, 2026, n=21,156

## Demand has evolved with gender and age

“I am trying to increase my protein intake”, by age and gender, 2026  
% of respondents who selected yes, by age group

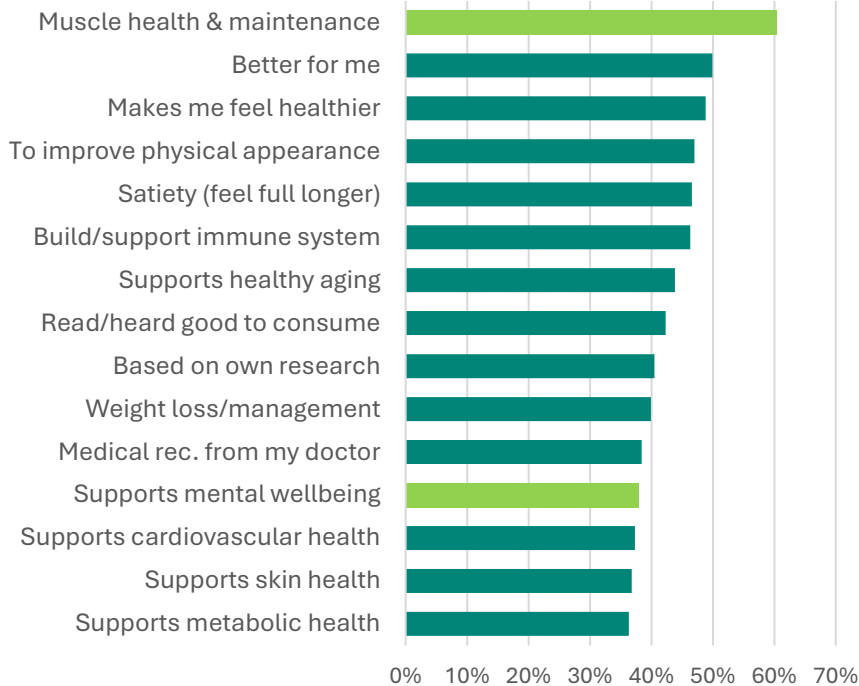


Source: Euromonitor International Voice of the Consumer Health and Nutrition Survey, 2026, n=21,156

# Fibre gains traction as consumers believe it meets their health demands

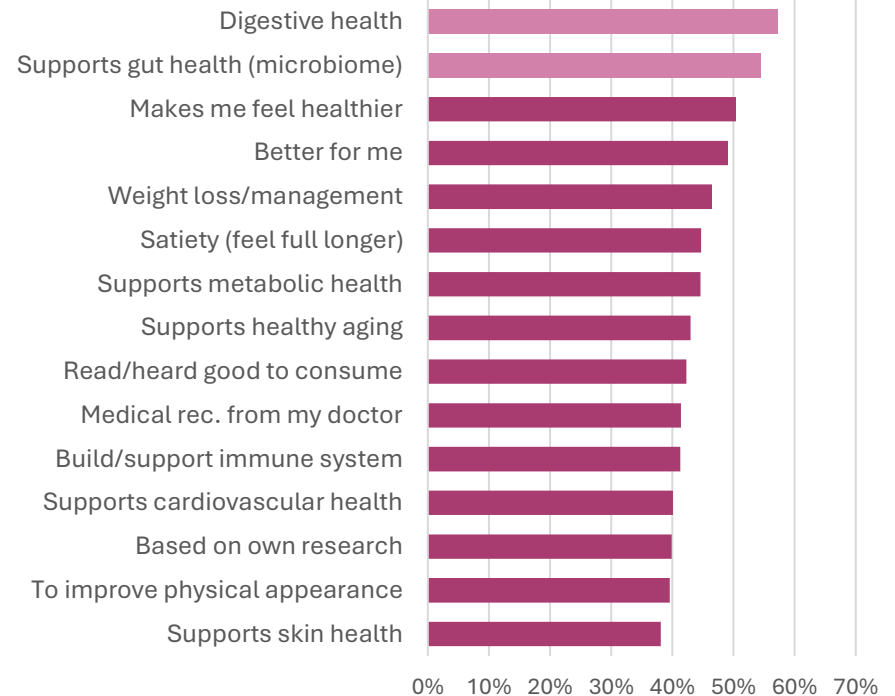
## Reasons for Seeking Protein, Global, 2026

% of respondents seeking protein on labels



## Reasons for Seeking Fibre, Global, 2025

% of respondents seeking fibre on labels



Source: Euromonitor International Voice of the Consumer Health and Nutrition Survey, 2026 n=4,799, 3,939



## So what do we get? ALL the claims

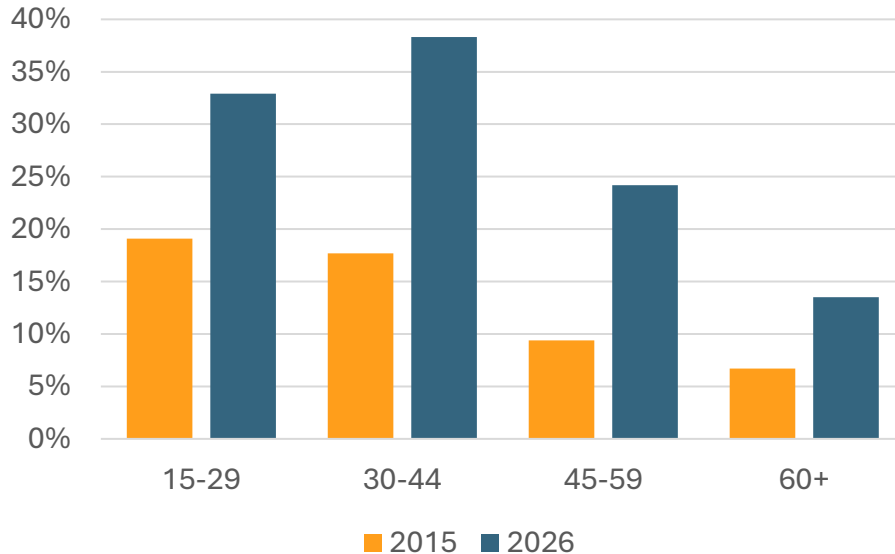
- October 2025: Mission Foods adds “GLP-1 friendly” to high fibre and protein variants
- The choice: explicitly call out suitability, or formulate/market without such a label
- Market dependent (e.g. prohibited in Europe)

Other claims on pack:	Keto Certified
Plant Powered	High Fibre
2g Net Carbs	0g Sugar
7g of Protein	“super soft”

Image source: [missionfoods.com/products/protein-tortilla-wraps/](https://missionfoods.com/products/protein-tortilla-wraps/)

# Cooking becomes less common

Order Food For Home Delivery, Weekly or More Often,  
2015 vs. 2026  
% respondents by age group



Source: Euromonitor International Voice of the Consumer Lifestyles survey, 2015 n= 16,320, 2026 n= 39,217

Rise of meal kits, recipe boxes, third-party delivery services

Euromonitor International's Voice of the Consumer: Lifestyles survey (2025, n=26,143):

- 23.4% “do not have time to cook” (19.7% in 2023)
- 18.6% “would rather spend their time doing other things than cooking” (15.3% in 2023)
- 15.4% “do not like to cook” (11.8% in 2023)

21.4% of those **aged 15-29** would rather spend their time doing other things, those **aged 30-44** are almost as likely to hold these opinions (19.3%)

One-person households: global forecast rise of 16.1% over 2025-30 vs. just 2.0% rise for four-person household

# Takeaways



Affordability  
remains upmost in  
grocery shopping  
decisions



**44% household  
increase on grocery  
spend 2019-25 (33%  
increase in income)**

Private label and  
cheaper retail  
channels continue to  
grow share



**16% CAGR for  
warehouse clubs,  
9% CAGR for  
discounters  
(2020-25)**

Iran War stymies  
hopes of price  
reductions/volume  
increases



**FAO Food Price  
Index hits 130.7 in  
April 2026**

Drags on future growth include GLP-1 use and demographic trends



**GLP-1 regulations are easing; the replacement rate is being missed across multiple countries**

Dissolution of traditional eating patterns is continuing



**18.6% “would rather spend their time doing other things than cooking” (15.3% in 2023)**

“Whole foods” are benefiting from desire for nutrients and processed food suspicion



**Eggs are the no.1 choice of protein source (71%); women are more likely than men to want more protein**



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# Thank you



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