# FAST, FRESH, OR FRUGAL?

UNDERSTANDING THE THREE FORCES RESHAPING THE UK FMCG FOOD MARKET IN 2026

We help FMCG brands turn market insight into meaningful brand momentum, driving growth and unlocking new opportunities.


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WARNING contents may trigger an increase in appetite. Viewer discretion is advised.

# EXECUTIVE SUMMARY

## AN INTRODUCTION TO FMCG

The UK food and grocery landscape is entering a new phase of consumer decision-making. One defined not by a single dominant driver, but by a three-way tension between convenience, health, and cost.

Consumers are navigating food choices in an environment shaped by prolonged cost-of-living pressures, heightened health awareness, and increasingly busy lifestyles. The result is a market where trade-offs are constant, and brand loyalty is conditional.

Analysis of consumer conversation data across the UK FMCG and CPG food sector between February 2025 and January 2026 reveals three defining truths:

1. Food must fit into consumers lifestyles, not interrupt them
2. Health perceptions are shifting, with fresh and non-UPF taking the lead
3. Consumers are seeking value-balanced options, not just lowest cost

## THE NEW CONSUMER EQUATION

The modern FMCG food purchase is rarely driven by a single factor. Instead, consumers weigh three competing needs:

Convenience + Health + Cost

Winning brands increasingly succeed by resolving this tension, rather than focusing on only one driver.

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# THE NEW FOOD EQUATION

## OPENING FOREWORD

The UK food landscape is changing - not through a single disruptive shift, but through the slow collision of multiple consumer priorities.

Convenience.
Health.
Cost.

Each has long shaped the food industry in different ways. But today, they are no longer independent drivers. They now interact, compete, and sometimes contradict one another in the minds of consumers.

The result is a new decision-making equation that every food brand must navigate.

Consumers want quick food, but they worry about ultra-processed ingredients.

They want healthier diets, but they are watching their grocery budgets.

They want affordable meals, but they still crave indulgence and discovery.

This tension defines the current FMCG food market.

In the UK, this dynamic is playing out against a complex economic backdrop. While food inflation has begun to stabilise after the sharp increases of recent years, many households continue to adjust their shopping habits in response to cost-of-living pressures.

At the same time, awareness of nutrition and food processing has never been higher.

Conversations around ultra-processed foods have entered mainstream discourse. Ingredient lists are scrutinised more closely. Shoppers are asking harder questions about where food comes from and how it is made.

And yet convenience continues to dominate everyday behaviour.

Busy lifestyles, hybrid work patterns and fragmented eating mean that food must increasingly adapt to life's rhythms. Meals are less structured, snacks are more frequent, and eating environments are more varied than ever before.

For food brands, this presents both challenge and opportunity.

Consumers are not abandoning convenience - but they are redefining what it should look like.

They want products that are:

- fast without feeling artificial
- indulgent without feeling excessive
- nutritious without feeling restrictive
- affordable without feeling cheap

In short, they want food that feels effortless but trustworthy.

This report explores how these competing priorities are shaping the UK FMCG food market.

Drawing on analysis of primary consumer conversation data across product categories and behavioural themes, it examines how shoppers are navigating the complex trade-offs between convenience, health, cost, and discovery.

From fresh produce and cooking ingredients to snacks, ready meals, and alternative proteins, the findings reveal a market defined not by clear winners and losers, but by shifting balances and hybrid behaviours.

Consumers today are not loyal to rigid dietary identities. Instead, they combine behaviours fluidly.

They may cook from scratch one evening and rely on ready meals the next.

They may experiment with plant-based foods without abandoning meat altogether.

They may pursue healthier diets while still embracing indulgence daily.

This flexibility is reshaping the competitive landscape of the food industry in the UK.

Success no longer comes from specialising in a single consumer need. Instead, the most successful brands increasingly launch products that resolve the tension between multiple priorities.

The next generation of food innovation will not simply focus on taste, price or nutrition in isolation.

It will focus on balance:

- Balance between speed and quality.
- Balance between indulgence and wellbeing.
- Balance between affordability and aspiration.

For FMCG brands, retailers, and innovators, understanding these dynamics will be essential to navigating the next decade of food consumption in the UK.

Because in the modern food market, the most successful products are no longer those that satisfy one need.

They are the ones that satisfy many at once.

**TL;DR**

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# THE UK FOOD LANDSCAPE

## MARKET CONTEXT

The UK food sector continues to operate under significant economic pressure.

Food price inflation peaked in 2023 but remains elevated relative to historical norms. According to KPMG's UK Consumer Pulse report, food prices remain a key concern for over 70% of households, with many continuing to adjust shopping behaviour.[1]

At the same time, consumers are becoming more deliberate in their spending.

Deloitte's 2024 Consumer Tracker found that UK shoppers increasingly evaluate purchases through a "value lens", balancing price with perceived quality, health, and sustainability.[2] This trend continued throughout 2025 and remains prevalent in 2026.

Meanwhile, health awareness is rising.

Research from Mintel's UK Food & Drink Trends report highlights growing consumer concern around ultra-processed foods, with more than 40% of UK consumers (and growing) actively trying to reduce their UPF consumption.[3]

This shift is influencing category performance across the UK's FMCG landscape.

# MARKET CONTEXT CONTINUED...

Ultimately, consumers are not abandoning convenience - but they are redefining it.

Convenience now increasingly means:

- quick preparation
- simple ingredients
- minimal processing
- portion control
- versatile formats

This dynamic creates both challenges and opportunities for brands.

The following report explores how these forces play out across consumer priorities and product categories.

# 1. THE CORE THEMES DRIVING CONSUMER DECISIONS

## 1.1 HEALTH VS COST VS CONVENIENCE

A thematic breakdown of online consumer conversations reveals the three forces shaping the UK food market. Convenience is clearly dominant, but the composition of these drivers tells a deeper story.

Thematic breakdown of health vs cost vs convenience drivers, by mention volume - UK FMCG & CPG Food Market, 2025-2026

## Convenience: the default decision filter

Convenience themes account for the largest share of food conversations amongst UK consumers.

Within this category, three major behaviours emerge:

| SUB-THEME | MENTION VOLUME |
|---|---|
| Quick and easy meals | 132k |
| Snacking and treats | 61k |
| Eat on-the-go | 44k |

Quick meals alone account for over half of convenience conversations. This reflects a broader structural shift in how people eat, with traditional meal structures - breakfast, lunch, dinner - becoming increasingly fragmented.

Hybrid work patterns, commuting variability, and social lifestyles have made eating occasions more flexible. Consumers now frequently rely on snack meals, fast preparation foods, and portable formats.

This is reflected in The Grocer's Future of Food report, which found that over 60% of UK consumers regularly replace meals with snacks or quick foods during busy periods.[4]

For FMCG brands, this means products are no longer competing solely within traditional meal categories. They compete within moments of consumption.

## Cost: the persistent pressure

Cost themes account for roughly 156k mentions in total, demonstrating that economic pressure continues to influence food purchasing behaviour.

The top three major cost-related conversations that appear in the data are:

| SUB-THEME | MENTION VOLUME |
|---|---|
| Cost of living | 73k |
| Investing in quality | 45k |
| Cooking to save money | 36k |

Interestingly, “invest in quality” appears alongside cost concerns, highlighting a nuanced consumer mindset. Consumers are not simply buying the cheapest products. Instead, they are prioritising value.

For consumers, this increasingly means investing in longer-lasting products, better ingredients, larger pack sizes, and multipurpose foods.

As EY’s Future Consumer Index notes, many shoppers now seek a “smart spending strategy” rather than purely trading down.[5] This behaviour explains why premium brands can still grow during economic pressure, provided they justify their price in terms that align with consumers’ value perceptions.

## Health: a changing definition

Health themes generated roughly 110k mentions, making them the third largest driver in the current UK market.

Within health discussions, the top three patterns that stand out are:

| SUB-THEME | MENTION VOLUME |
|---|---|
| Weight management | 59k |
| Nutritional wellness | 47k |
| Fresh / non-UPF foods | 46k |

Historically, and even earlier in 2025, diet culture dominated health conversations.

Today, the focus is shifting.

Consumers are increasingly concerned with food quality, ingredient simplicity, processing levels, and long-term wellbeing.

The recent rise of anti-UPF discourse is particularly notable and is driven largely by academic research and consumer content on social media. Several brands are already maximising on this trend, including M&S with their new – and very positively received – minimal ingredient labelling.

Crucially, Mintel reports that half of UK consumers now consider food processing levels when making purchases.[3] This shift presents implications across the FMCG ecosystem, with brands perceived as overly processed likely to face growing scrutiny.

## Strategic takeaway: the three-driver tension

The current UK consumer is navigating a balancing act between convenience, health, and cost. The products and brands that win in this market are therefore increasingly helping consumers to resolve this tension.

Examples include:

- healthier ready meals
- premium frozen foods
- minimally processed convenience options
- high-protein snack foods
- quick-cook fresh meal kits

Brands that successfully blend these attributes are likely to capture disproportionate growth compared to more traditional FMCG products that fall under UPF or HFSS brackets.

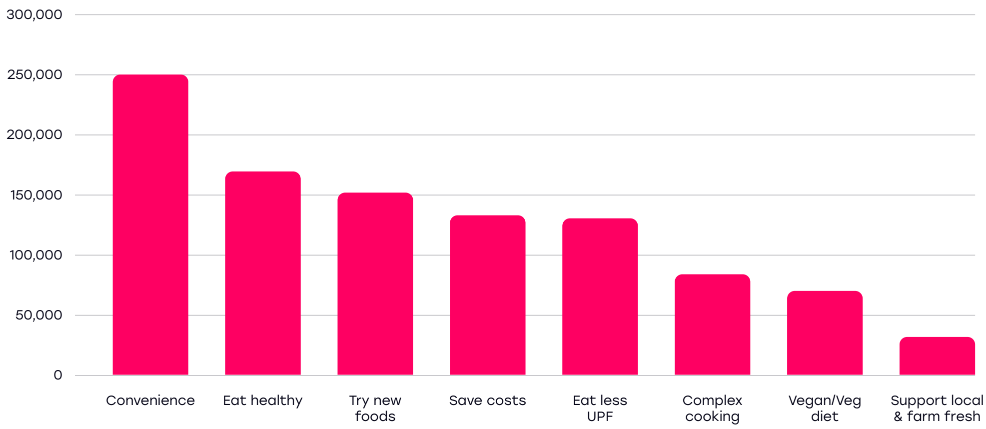
**KEY TAKEAWAY**

Convenience dominates modern food behaviour, but the biggest growth opportunities lie where convenience, health, and affordability successfully overlap.

## 1.2 CONSUMER PRIORITIES IN FMCG FOOD CHOICES

An analysis of consumer priorities when choosing food products or brands further reinforces the dominance of convenience, but also highlights a broader range of motivations beyond the three core thematic decision drivers covered in section 1.1. Based on the top 8 specific priorities that emerged in consumer discussions, there are several notable insights that emerge.

UK consumer priorities in FMCG & CPG food choices, 2025-2026




### Health is broadening beyond dieting

“Eat healthy” ranks as the second largest priority. However, the concept of health is expanding. Consumers increasingly associate healthy eating with whole foods, fresh ingredients, reduced processing, and balanced nutrition.

This aligns with rising discussion around UPFs. The “eat less ultra-processed food” theme (in fifth position) aligns very closely with the broader “eat healthy” category, and reinforces this shift in health goals beyond weight loss and dieting contexts. Overall, we are seeing a structural reframing of health in the UK food market which is, crucially, being driven by the consumers themselves and not by marketing claims.

## Curiosity drives experimentation

“Try new foods” ranks as the third highest consumer priority. This reflects the influence of factors such as social media food culture, global cuisines, food discovery platforms, and supermarket innovation cycles. The “complex cooking” priority (sixth position) also supports this broader theme, as more consumers are showing interest in stepping-up their home cooking activities and spending more time in the kitchen.

According to BCG’s consumer innovation research, younger consumers increasingly prioritise novelty and experience in food purchases. [6] This aligns with much of the conversation around trying new foods taking place on TikTok, which is typically dominated by Gen Alpha, Gen Z, and younger-Millennial audiences.

This dynamic around willingness-to-experiment creates opportunities for products and brands which can offer flavour innovation, limited-edition launches, fusion cuisines, international product inspiration, or authentic internationally imported products.

## The vegan plateau and emergence of farm fresh

Vegan and vegetarian diets remain visible but rank lower than many other priorities. This aligns with broader industry observations; while plant-based products surged in popularity during 2018-2021, growth has slowed in more recent years.

Deloitte’s consumer research suggests that many shoppers now seek plant-forward options without fully abandoning animal products.[2] This suggests that consumers increasingly favour flexitarian eating rather than strict vegan diets, and are driven by broader motivations such as health and environmental impacts rather than only animal welfare.

Aligning closely with these motivations is the priority of supporting local and farm fresh produce; whilst this ranks in eighth position, it is notable as a newly emerged and growing consumer priority coming into 2026.

**KEY TAKEAWAY**

Modern food choices are shaped by consumers’ desire to balance wellbeing, affordability, and discovery within increasingly fast-paced lifestyles.

# 1.3 THE RISE OF HEALTH-CONSCIOUS FOOD BEHAVIOURS

Whilst coming in behind convenience and cost in terms of overall drivers of consumer food decisions, health discussions show a clear upward trajectory across the study period. Notably, health priorities appear to be growing at a faster rate than both convenience and cost, suggesting that this may soon become the top motivation for UK consumers.

## Seeking healthier options

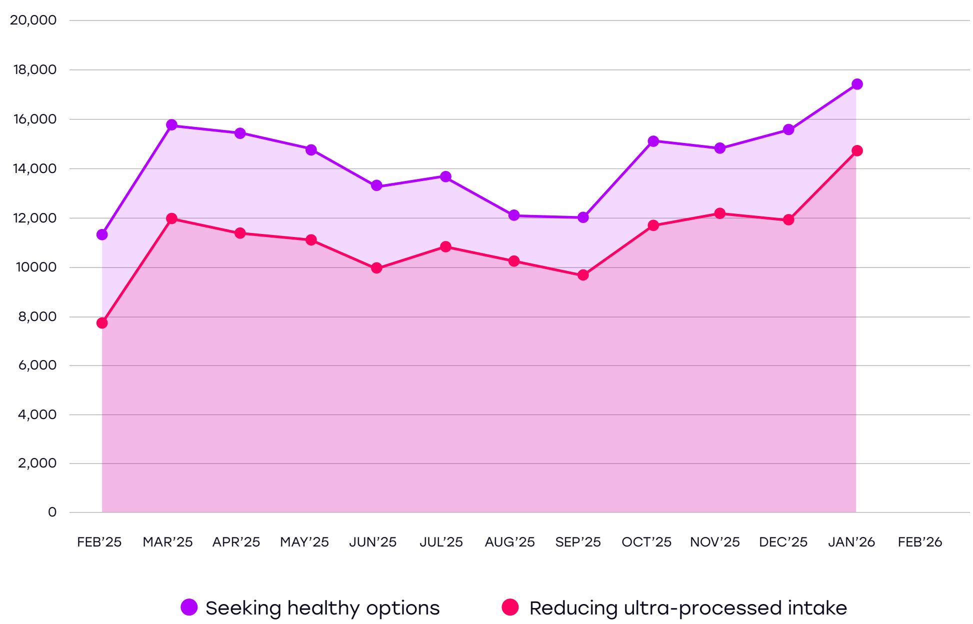
Mentions of consumers actively searching for healthier food options show strong momentum and growth.

Interest spikes particularly in March, October & January, corresponding with typical behavioural triggers such as new year health resolutions, seasonal lifestyle resets, and post-holiday dietary adjustments.

Despite these peaks, however, the overall trend line shows sustained growth. This suggests that health is becoming a more permanent behavioural factor for consumers.

Discussions about health-conscious food choices show an overall mirrored growth pattern between seeking healthy options more broadly, and reducing ultra-processed intake specifically. This highlights how key the UPF discourse is in the current market, and establishes it as a growing priority for most health-conscious UK consumers.

Mention volumes over time - health-concious food choices
UK FMCG & CPG food market, UK 2025-2026



# 1.3 THE RISE OF HEALTH-CONSCIOUS FOOD BEHAVIOURS CONTINUED...

## Reducing ultra-processed food intake

The rise of anti-UPF sentiment is one of the most important shifts in the current UK food market. Mentions of reducing ultra-processed food consumption increased significantly during the study period.

The trend accelerates notably toward the end of 2025, aligning with growing public debate around food processing and health.

According to The Grocer, UK retailers have already begun responding with clearer ingredient communication and product reformulation strategies, with M&S being a leader in this strategic shift. [4]

**KEY TAKEAWAY**

Health is evolving from calorie-counting to ingredient consciousness, with consumers increasingly prioritising freshness, transparency, and reduced processing.

# 2. CATEGORY TRENDS AND DEMAND

## 2.1 SNACK & FAST-CARB CATEGORIES

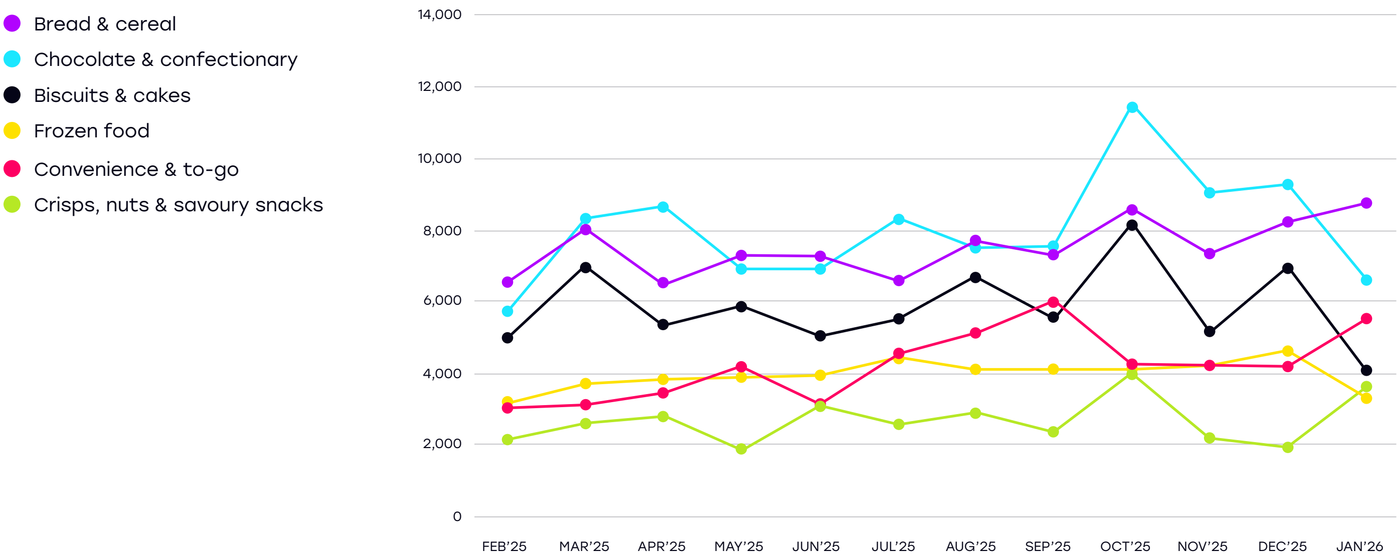
### The engines of everyday consumption

While fresh and health-driven categories are growing in conversation, the snack and fast-carb ecosystem remains one of the most culturally dominant and commercially powerful segments in the UK FMCG food market. Categories analysed in this section include:

- Bread & cereal
- Chocolate & confectionery
- Biscuits & cakes
- Frozen foods
- Convenience & to-go
- Crisps, nuts & savoury snacks

These are categories that thrive in moments of convenience rather than meals. They fuel breakfast shortcuts, mid-afternoon energy dips, commuter eating, desk lunches, late-night indulgence, and impulse purchases. In other words: they power modern eating behaviours.

Mention volumes over time - snack & fast carb aligned product type categories - UK FMCG & CPG foods market 2025-2026



## Bread & cereal: the quiet resurgence of everyday staples

Bread and cereal continue to hold a significant position within the UK food conversation. Across the observed period, mention volumes fluctuate between 6,500 and 8,800, with a clear upward trend toward early 2026.

This trajectory suggests that traditional carbohydrate staples are not declining as dramatically as popular narratives around low-carb diets may imply. Instead, consumers appear to be redefining their role.

Bread and cereals increasingly function as affordable meal foundations, quick breakfast solutions, bases for healthy toppings, and hybrid snack-meal formats. The category therefore benefits from its versatility and accessibility in line with consumer convenience and cost priorities.

During times of economic pressure, staples tend to regain prominence because they support cost-efficient meal creation; and this is exactly what we are seeing in the current UK market.

According to EY's Future Consumer Index, over 60% of UK consumers report increasing home meal preparation to manage food spending, which naturally supports staple ingredients like bread, cereals, rice and pasta.[5]

However, the category also faces challenges. Health narratives around refined carbohydrates continue to influence consumer perception, especially on social media platforms, pushing brands toward innovation in:

- wholegrain formulations
- high-protein breads
- fortified cereals
- gut-health focused ingredients

Brands that reposition staples as nutritional foundations rather than empty carbs are therefore likely to capture the strongest growth in 2026.

## Chocolate & confectionery: the emotional category that refuses to slow down

Chocolate and confectionery generate the highest peaks of conversation across snack categories, with notable spikes exceeding 11,000 mentions.

This category therefore demonstrates strong volatility, but also clear resilience.

Even during periods of economic constraint, indulgence remains a critical part of consumer behaviour in the UK. Research from Mintel's UK Treating & Snacking report shows that over 70% of UK consumers regularly purchase indulgent snacks as a form of emotional reward.[7] This dynamic makes confectionery somewhat recession-resistant.

However, the category is undergoing significant transformation, with three structural shifts emerging:

**1. Premiumisation**
Consumers are increasingly choosing smaller quantities of higher-quality chocolate.

Premium chocolate brands have experienced strong growth, particularly in dark chocolate, ethically sourced cocoa, craft chocolate, and flavour-led innovation categories.

**2. Ethical sourcing**
Consumers are paying more attention to supply chains.

Issues surrounding cocoa farming conditions and sustainability have elevated the importance of fair trade certification, transparency in sourcing, and regenerative agriculture, with some consumers willing to pay higher prices for ethical assurance.

**3. Portion-conscious indulgence**
Many brands are introducing mini formats, resealable packaging, and calorie-controlled bars. These innovations align indulgence with health-conscious behaviours, meeting demand from both consumers and public health campaigns.

The result of these three structural shifts is a category that remains emotionally powerful but is increasingly strategically sophisticated.

## Biscuits & cakes: comfort food in a modern market

Biscuits and cakes maintain steady mention levels between 4,000 and 8,200 throughout the analysis period. The category also shows periodic spikes, particularly around seasonal events and colder months.

Biscuits and cakes benefit from a powerful cultural position in the UK. They are deeply embedded in everyday rituals such as tea breaks, workplace snacks, family treats, and social gatherings.

Ultimately, the UK's "tea culture" remains a key consumption driver for this category.

According to The Grocer's Bakery Market Report, biscuits continue to outperform many other snack categories due to their association with comfort, nostalgia, and affordability. [8]

However, innovation is reshaping the category, with more recent growth areas including:

- protein biscuits
- gluten-free options
- reduced sugar formulations
- hybrid products combining biscuits with confectionery elements

These developments reflect broader consumer expectations that even indulgent categories should evolve alongside health trends.

## Frozen food: the convenience comeback

Frozen food has historically suffered from perceptions of lower quality compared to fresh alternatives. However, the category has undergone a major reputational transformation in the last decade.

Mentions in this analysis range between 3,500 and 4,700, with a gradual upward trend. Frozen food benefits from several powerful advantages in the current market:

- Cost efficiency – frozen products often offer better value per portion, especially for meat and fish products.
- Waste reduction - frozen food extends shelf life and reduces food waste, which is an increasingly important financial and ethical concern for UK households.
- Nutritional credibility - modern freezing techniques preserve nutrients effectively, with consumers now associating the category more with “fresh frozen” benefits rather than prior nutrient-lacking perceptions.
- Meal convenience - Frozen categories support quick meal assembly and reduce reliance on less healthy or more expensive options like takeaway and fast food.

Overall, frozen food is increasingly positioned as a hybrid solution between convenience, cost, and health in the UK market. This is a key driver behind the category’s stable performance, and aligns it well with consumer priorities going into 2026.

## Convenience & to-go: the fastest-growing consumption market

Convenience and to-go foods show clear upward momentum throughout the dataset. Mentions grow from roughly 3,000 to over 5,500, reflecting the increasing role of portable meals in everyday life and cementing this category as the fastest-growing segment in the data set.

This category includes products such as chilled ready meals, meal deal items, portable snacks, and cup noodles, rice, and pasta.

The expansion of hybrid work patterns is a significant driver of reshaped food consumption in the UK market. According to KPMG's Consumer Pulse research, many consumers now eat meals across multiple environments such as home, the office, commuting spaces, and social settings. [6]

This fragmentation increases demand for food that is

- portable
- quick to prepare
- easy and clean to eat on the go
- flexible in portion size

Retailers have capitalised on this shift through the expansion of meal deal ecosystems, which combine sandwiches, snacks and drinks into convenient bundles. This structure is particularly appealing to consumers, as it balances convenience with cost efficiency. Meal deals also support consumer interest in trialling new products, as it allows them to experiment in ways that feel low risk due to single serving sizes and the perception of often getting the snack or drink "for free".

Convenience foods are therefore not simply about speed.

They are about adaptability to modern life rhythms and giving consumers the flexibility they crave.

## Crisps, nuts & savoury snacks: international flavours take centre stage

Savoury snack conversations fluctuate between 1,900 and 4,000 mentions, reflecting a highly competitive and more volatile category landscape.

Unlike confectionery, savoury snacks are increasingly diversified across multiple subsegments such as:

- protein snacks
- vegetable crisps
- baked snacks
- nuts and seeds
- international flavours

Innovation is particularly strong in flavour development and international inspiration, with UK consumers being increasingly drawn to bold, global flavour profiles.

BCG's food innovation research notes that younger consumers, especially, increasingly seek "flavour discovery" experiences in snack foods, encouraging brands to experiment with global cuisines and unexpected pairings. [6]

This category also benefits from alignment with health trends.

Nuts and seeds are often perceived as natural and nutrient-rich, supporting their inclusion in healthier snacking routines alongside newer market entrants such as seaweed thins and lentil crisps.

## Strategic takeaway – the snacking and convenience economy is thriving

The snack and convenience ecosystem remains one of the most vibrant areas of the UK FMCG food market. Despite growing health awareness, consumers continue to embrace snacking and indulgence on a daily basis.

However, expectations are evolving, with consumers increasingly wanting snacks and convenience foods that deliver:

- functional nutrition
- portion control
- flavour excitement
- ingredient transparency

In short, snacks must now do more than satisfy hunger or provide convenience. They must deliver an indulgent experience and health reassurance simultaneously.

Brands that can achieve this, without charging significantly more premium prices, are most likely to see growth in the 2026 market landscape.

**KEY TAKEAWAY**

Snacking has evolved from occasional indulgence into a core eating behaviour shaped by convenience, fragmented meals, and functional nutrition trends.

# 2.2 FRESH PRODUCE & COOKING CATEGORIES

## The home kitchen strikes back

The next cluster of categories reveals a very different behavioural story.

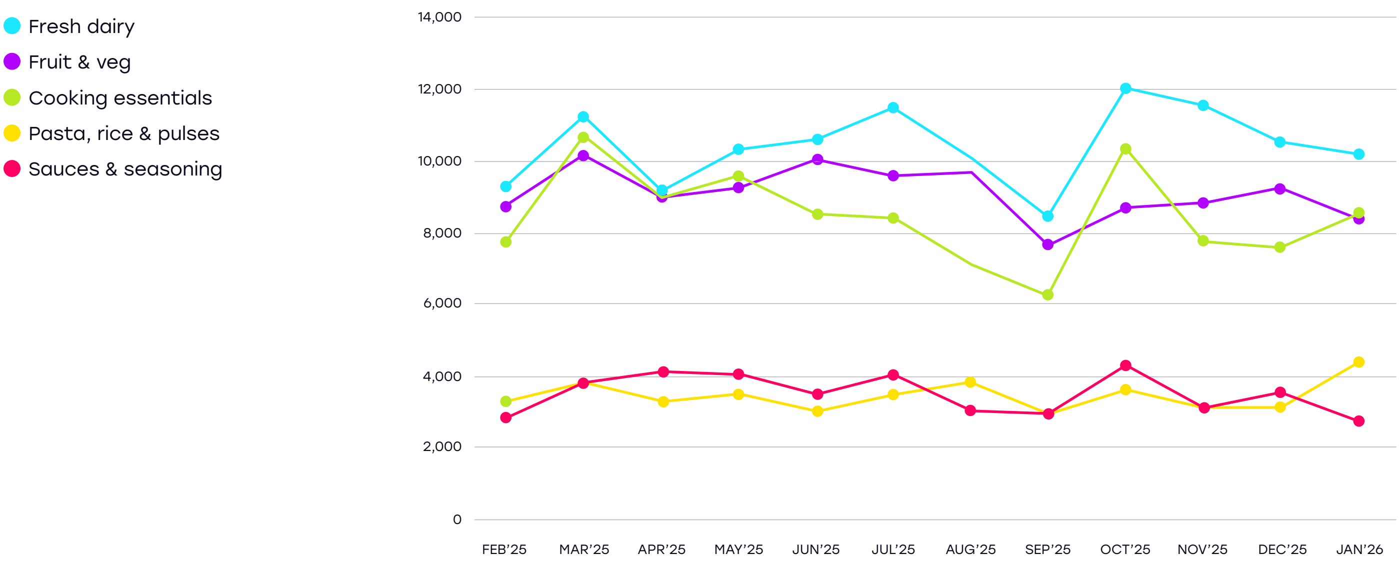
Here we examine:

- Fresh dairy
- Fruit & vegetables
- Cooking essentials
- Pasta, rice & pulses
- Sauces & seasonings

These categories represent the ingredients of home cooking.

While convenience food often dominates industry conversation, the data reveals that fresh produce and cooking-related categories continue to play a crucial role in UK consumer behaviour.

Mention volumes over time - fresh produce & cooking aligned product type categories - UK FMCG & CPG foods market 2025-2026



## Fresh dairy: a core category with lasting strength

Fresh dairy generates the highest consistent conversation volume among cooking-related categories, ranging between 8,500 and 12,000 mentions.

The category benefits from its central role in multiple eating contexts including breakfast, daily cooking, beverages, and snacking, with products such as milk, yoghurt, and cheese remaining fundamental to UK diets.

However, dairy is evolving in the UK space, with the most significant growth areas being:

- high-protein dairy
- lactose-free products
- functional yoghurts
- probiotic beverages

These innovations align dairy with health and wellness narratives whilst, at the same time, demand for dairy alternatives continues to expand. Certain products, including cottage cheese, high-protein yoghurt pouches, and kefir have seen significant growth in consumer interest in the last year, driven largely by social media trends and viral recipes.

However, the data suggests that traditional dairy still dominates the bulk of consumer demand, with classic everyday cheeses (cheddar, mozzarella, grated cheese) and cow's milk being the most frequent product types mentioned in conversations.

## Fruit & vegetables: health's most authentic signal

Fruit and vegetable mentions fluctuate between 7,500 and 10,000, reflecting steady consumer interest. This aligns with prominent consumer priorities, as fresh produce is strongly associated with health benefits.

However, the category faces structural challenges due to products being perceived as:

- perishable
- price sensitive
- labour intensive to prepare

These barriers sometimes limit consumption frequency and drive consumers towards convenience options – such as frozen vegetables or smoothie mixes – as an alternative.

Nevertheless, rising interest in reducing ultra-processed foods supports demand for fresh fruit and vegetable produce, with these foods being seen as safe, trustworthy, and transparent wholefood options.

To balance the consumer drives for health and convenience, retailers are increasingly responding with innovations such as pre-cut vegetables, ready-to-cook kits, and pre-prepared salad bowls. These solutions attempt to bridge the gap and sway consumers back towards fresh options over frozen or packaged products.

Another notable trend is that fruit and vegetables see greater growth in consumer interest during summer months. This seasonality aligns with consumers more actively choosing light salads and refreshing fruit in place of heavier meals and comfort foods during hot weather spells.

## Cooking essentials: the backbone of home cooking

Cooking essentials show significant volatility across the timeline. Mentions range between 6,000 and 10,400, with a particularly strong spike in October.

The essentials category includes products such as oils, spices, stocks, flour, sugar, eggs, and salt. It is a category where seasonality and weather conditions have a notable impact, with a steady decline being seen in summer months when cold "picky dinners" and salads dominate meal preferences.

On the other hand, cooking essentials often experience spikes when consumers become more engaged in meal preparation. This typically corresponds with:

- seasonal cooking trends – especially in autumn months
- colder seasons when hot meals are preferred
- social media recipe cycles
- holiday preparation periods

According to Mintel's Cooking Habits report, younger consumers increasingly use social media platforms such as TikTok and Instagram to discover new recipes. [7] This behaviour fuels experimentation and boosts ingredient demand, making this category intrinsically linked with both seasonal and social trends.

## Pulses & grains, sauces & seasonings: affordable foundations

Mentions for pasta, rice and pulses remain relatively stable around 3,000 to 4,400, whilst sauces and seasonings maintain similar levels between 3,000 and 4,300 mentions.

Despite having lower absolute volumes, these products function as foundational ingredients in both cost-conscious meal planning and culinary creativity.

During economic pressure, these categories often see increased consumption for essential products like rice and pasta because they offer long shelf life, affordability, and versatility. This category sees a more significant uplift going into January 2026, and is likely to see continued growth amid volatile economic pressures throughout the coming year.

These products also align with growing interest in plant-forward eating, with pulses in particular gaining attention as sustainable and cheap protein sources.

Meanwhile, innovation and demand within the sauces and seasonings category often reflects broader cultural trends. Recent growth areas for this category include Korean, Mexican, and Middle Eastern flavours, reflecting the growing globalisation and experimentation of UK food culture.

**KEY TAKEAWAY**

Consumers continue to aspire toward fresh, home-prepared food, even as time pressures push them toward convenience-led behaviour.

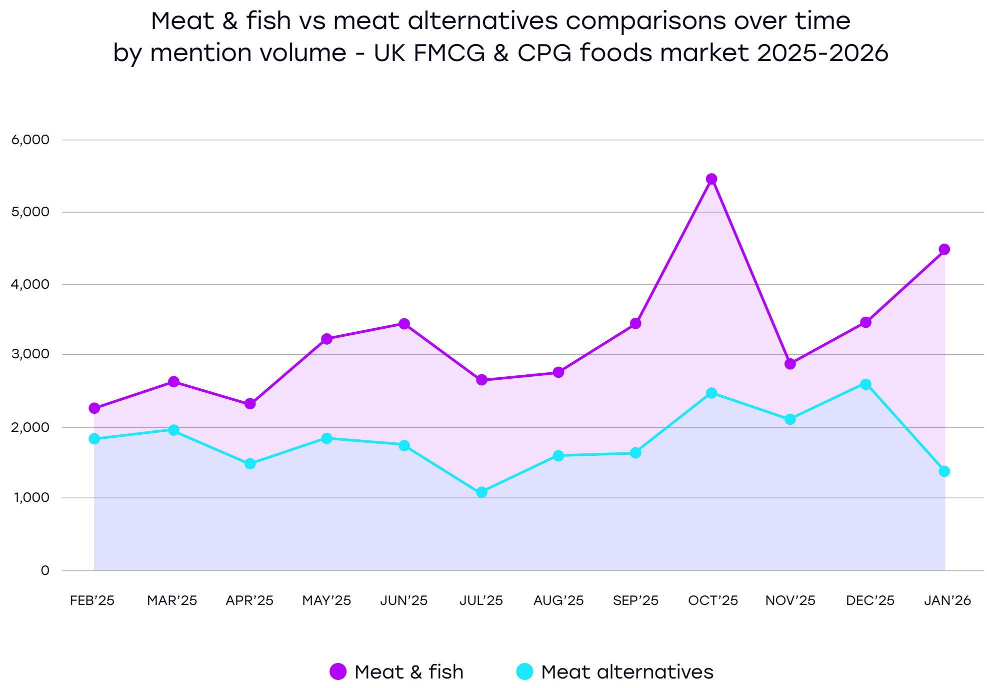
# 2.3 MEAT & MEAT ALTERNATIVES

## Flexitarianism takes hold

The comparison between traditional meat and meat alternatives offers valuable insight into changing dietary patterns in the UK market.

Across the dataset, meat consistently generates higher conversation volume than alternatives. However, meat alternatives show a steady upward trend. Combined with trends detected across plateauing veganism and broader motivations for meat alternatives outside of animal welfare alone, it appears that more UK consumers are adopting a flexitarian lifestyle.

This allows them to experiment with vegan and vegetarian diets, which align well with personal health, environmental, and ethical goals, whilst still having the self-appointed freedom of eating meat several times a week or on select occasions such as in social settings.



## Meat & fish: a category under pressure

Mentions for meat and fish range between 2,300 and 5,400, peaking in October in alignment with a similar peak for cooking essentials.

Overall, this category remains central to UK diets, but is experiencing several pressures that are influencing consumer perception and investment. These pressures include:

- environmental concerns
- animal welfare debates
- rising meat prices
- health concerns around red meat

These pressures are encouraging consumers to reduce consumption frequency of meat and fish. For many, price is the key motivator behind cutting down meat consumption. However, ethics also play a role as a significant number of consumers lean towards meat-free meals several times a week over purchasing cheap meat that has been factory farmed.

However, UK consumers are not abandoning meat entirely. The growth seen in this category throughout the year suggests that many consumers are reverting to old habits of regular meat consumption as soon as they can afford to do so.

## Meat alternatives: small but still growing

Meat alternatives maintain lower conversation volumes between 1,100 and 2,500 mentions, with the volume gap opening compared to meat & fish in more recent months. Notably, this category sees a significant dip in January 2026, compared to meat & fish growing in the same month. This suggests that fewer consumers are engaging with 'Veganuary' diet trends, and that many consider meat and fish to be an essential protein source aligning with their new year health goals and diet regimes.

However, despite the January dip, the overall trend line still shows gradual growth for this category. Importantly, sentiment analysis later in this report reveals that meat alternatives have the highest positive sentiment of any category. This suggests strong enthusiasm amongst it's more niche consumer base.

The growing flexitarian model in the UK supports this category's growth, as habitual meat eaters are experimenting more with meat alternatives. However, flexitarianism is likely to also be a key driver behind the slower growth seen, as greater numbers of previously-full-time vegans and vegetarians are now adopting more flexible lifestyles with occasional meat consumption. Products in this category also tend to suffer from being perceived as expensive, especially compared to wholefood options such as lentils, mushrooms, and nuts.

**KEY TAKEAWAY**

Flexitarian eating is becoming mainstream as consumers increasingly blend traditional proteins with plant-based alternatives rather than fully replacing either.

# 2.4 COOKING VS CONVENIENCE

## The market's central trade-off

The final behavioural comparison highlights one of the most important dynamics in the current UK food market.

Cooking essentials show a slight downward trend across the period, whilst convenience and to-go foods show a steady upward trajectory. This contrast reflects broader lifestyle shifts, as consumers often aspire to cook more but struggle to balance this ambition with time constraints. The result is hybrid behaviour.

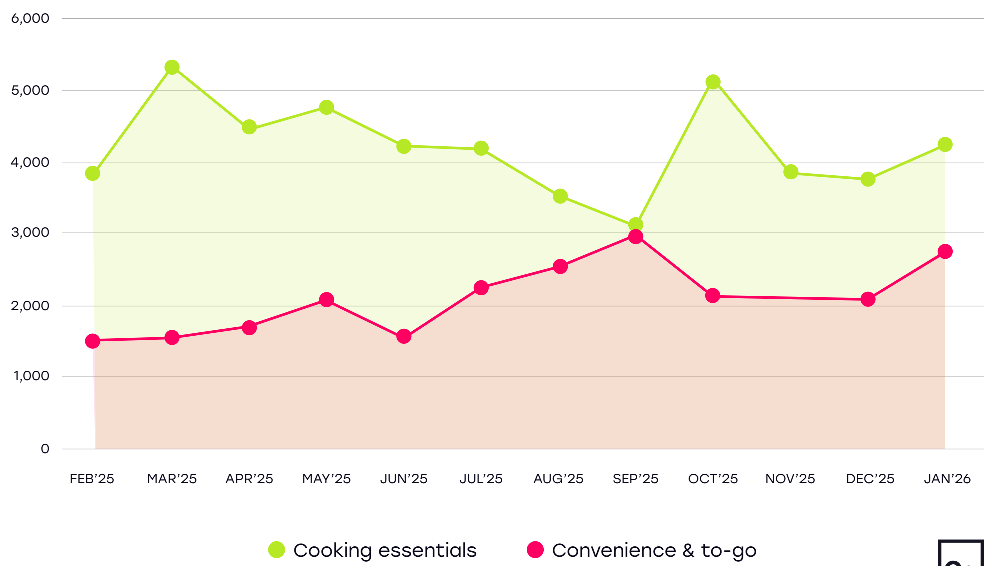
Modern consumers will typically alternate between cooking from scratch, assembling quick meals, and purchasing ready-made options.

The winning brands increasingly operate within this middle ground, with the products likely to see the greatest levels of growth in 2026 being:

- semi-prepared meal kits
- pre-marinated proteins
- ready-to-cook vegetables
- health-aligned frozen meals
- snacks that can be adapted into meals

These products reduce preparation effort while maintaining the feeling of home cooking and, in most cases, also aligning with consumer health priorities.

Cooking essentials vs convenience food comparisons over time
by mention volume - UK FMCG & CPG foods market 2025-2026



## Strategic takeaway – the modern UK kitchen is hybrid

The data reveals that the future of the UK food market is not defined by a single model, with consumers often blending multiple eating behaviours.

They may cook elaborate meals on weekends but rely on convenience foods during the week. They may pursue health goals but still indulge in snacks. They may reduce meat consumption while still purchasing traditional proteins most days.

For FMCG brands, this complexity creates enormous opportunity. The most successful brands will not force consumers to choose between convenience, health, and affordability.

Instead, they will design products that resolve the tension between them.

**KEY TAKEAWAY**

The modern consumer no longer chooses between cooking aspiration and convenience - they increasingly seek products that empower them to achieve both.

# 3. CATEGORY SHARE OF CONSUMER ATTENTION

### Where the conversation lives

Understanding the share of consumer attention across food categories reveals how different parts of the FMCG market compete for mindshare.

Conversation share does not perfectly mirror sales share - but it provides a powerful proxy for consumer interest, cultural relevance, and behavioural momentum.

Category shares across the data set signify several structured consumer patterns within the current UK food market.

Product type category shares by mention volume
UK FMCG & CPG foods market 2025-2026

## 3.1 FRESH FOOD LEADS THE CONVERSATION

Fresh dairy and produce represent the two largest conversation categories. Accumulated, they account for over 23% of consumer food discussion in the UK. Furthermore, when combined with the cooking essentials category, over 33% of market conversation can be attributed to fresh produce and cooking contexts. This reinforces the growing importance of freshness and perceived naturalness in consumer decision-making.

Even though convenience foods dominate behaviour, consumers still frame their aspirations around fresh food and cooking. This phenomenon reflects what behavioural economists often call the intention-behaviour gap.

Consumers want to eat fresh and healthy, even if their actual shopping basket includes convenience products.

The primary data shows that health remains one of the most cited motivations in food purchases, even when economic pressure is high. However, convenience continues to appeal more on a behavioural level.

For brands, this means that aligning products with fresh and natural cues alongside convenience can be powerful, especially in processed and packaged food categories.

# 3.2 EVERYDAY INDULGENCE DOMINATES THE MIDDLE OF THE MARKET

A cluster of aligned categories fill the middle-market space, and hold a significant combined share of just over 35% of the conversation. These categories are:

- chocolate & confectionery
- bread & cereal
- tea & coffee
- biscuits & cakes

From a consumer behaviour perspective, these products occupy the emotional centre of everyday consumption. They represent daily rituals, comfort foods, and habitual purchases relating to deeply embedded cultural contexts such as afternoon tea breaks and pre-bedtime sweet treats.

This cultural embeddedness helps explain the continued resilience of these categories even during economic volatility and a growing health-conscious market.  UK consumers ultimately see these daily indulgences not as extravagant rewards, but as moments self-care which they are unwilling to sacrifice.

## 3.3 SMALLER BUT STRATEGIC CATEGORIES

Lower-share categories such as sauces, condiments and meat alternatives play an outsized role in innovation and culinary experimentation.

These categories often act as trend accelerators, introducing new flavours, ingredients and dietary concepts that later influence larger categories.

For example:

- plant-based sauces can influence plant-based meals
- global condiments can reshape cooking trends
- new spreads can influence breakfast habits

These categories may appear small in share, but they are often innovation laboratories for the broader food industry. In particular, these categories carry purchasing motivation amongst younger, more experimental, consumers who are likely to drive new trends within the market via social media and word-of-mouth.

**KEY TAKEAWAY**

Fresh and everyday food categories dominate consumer attention because they sit at the intersection of health, habit and emotional trust.

# 4. CATEGORY SENTIMENTS

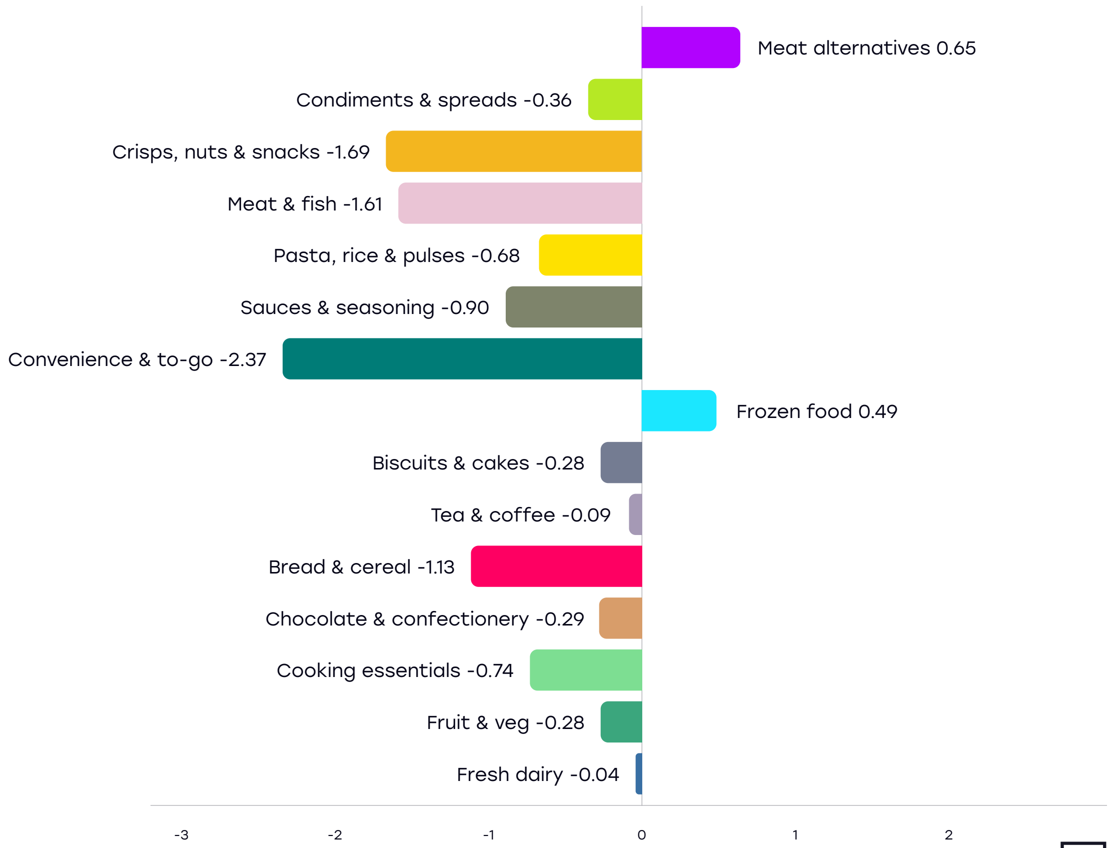
## Where consumers feel most positive

While conversation volume reveals interest, sentiment analysis reveals emotional perception. Some categories generate large amounts of conversation but are driven by significant negative sentiment. Meanwhile, others generate smaller discussion volumes but benefit from very positive consumer associations.

Understanding this distinction is crucial for identifying growth opportunities versus reputational challenges.

Net sentiment is scored from -5 (most negative) to + 5 (most positive), with 0 indicating a neutral category. In food & drink markets, which are highly susceptible to opinions, fads, and personal preferences, it is typical for negative sentiments to be stronger than positive sentiments.

Net sentiment score by product type category
UK FMCG & CPG foods market 2025-2026



## 4.1 HIGHEST POSITIVE SENTIMENT CATEGORIES

The most positively perceived categories in the current market are meat alternatives (+0.65) and frozen food (+0.49).

Although meat alternatives represent the smallest share of conversation, they generate the highest positive sentiment score. This reflects the enthusiasm of their core consumer base, with plant-based consumers often viewing these products as:

- ethically aligned
- environmentally responsible
- innovative
- empowering

However, positive sentiment does not necessarily translate into mass adoption. Plant-based products still face barriers including price premiums, misalignment of taste expectations, and nutritional scrutiny.

According to BCG's protein transition report, alternative proteins may capture up to 11% of global protein consumption by 2035, but adoption will likely remain gradual. [9]

Meanwhile, frozen food's strong positive sentiment reflects a major reputation recovery compared to the early 2000s.

Once associated with lower quality, frozen food now benefits from narratives around convenience, value, and reduced waste, all of which directly align with key consumer priorities in the current market.

Consumers increasingly view frozen products as a smart household solution rather than a "lazy" or nutritionally poor choice.

# 4.2 NEUTRAL-TO-MIXED SENTIMENT CATEGORIES

Several large categories generate neutral sentiment scores.

These include:

- Fresh dairy
- Tea & coffee
- Biscuits & cakes
- Chocolate & confectionery

These categories are often habitual purchases rather than emotionally polarising products. Consumers may not discuss them passionately, but they continue to buy them consistently.

The outlier in this group is chocolate and confectionery. Purchases in this category tend to be more emotionally charged, however positive contexts around self-reward and gifting balance out negative health-related contexts to create an overall-neutral market segment.

## 4.3 NEGATIVE SENTIMENT CATEGORIES

The most negative sentiment scores appear in:

- Convenience & to-go (-2.37)
- Crisps, nuts & savoury snacks (-1.69)
- Meat & fish (-1.61)
- Bread & cereal (-1.13)

Convenience foods generate the most negative sentiment despite strong consumption patterns. This reflects a paradox in modern food behaviour, with consumers relying heavily on convenience foods despite often perceiving them as less healthy, overly processed, or nutritionally inferior.

This tension reinforces the importance of healthy convenience innovation as an opportunity for brands to leverage in 2026.

Snack foods face similar perception challenges. Consumers enjoy them but often associate them with unnecessary indulgence, unhealthy ingredients, and overconsumption.

Brands that introduce healthier and pre-portioned snack alternatives can therefore capture strong demand that counters the themes driving most of the negative sentiment in this category.

Negative sentiment around meat products reflects growing concerns about sustainability, animal welfare, and health implications. However, consumption levels remain high. Similarly, bread and cereals experience negative sentiment from dietary trends and discourse that demonise carbohydrates. However, many consumers still rely on these as a daily staple in more balanced diets.

This again reflects the intention-behaviour gap in consumer food choices in the current market, emphasising the opportunity for brands to align with broader, and often conflicting, consumer priority needs.

**KEY TAKEAWAY**

The categories consumers rely on most are not always the ones they feel best about, creating major opportunities for perception-led innovation.

# 5. CROSS-MARKET INSIGHTS

## 5.1 WHAT THE DATA REALLY TELLS US

When viewed together, the full dataset reveals several critical dynamics in the current UK FMCG food market.

### 1. Convenience dominates behaviour but struggles with perception

Convenience is the largest driver of food choice amongst UK consumers. However, convenience categories also suffer the lowest sentiment scores. This suggests a major opportunity to unlock significant growth for brands that can make convenience feel healthier, fresher, and more transparent in 2026.

### 2. Freshness remains the most powerful health signal

Fresh dairy and produce dominate conversation share, and consumers consistently associate freshness with health and quality.

Brands that successfully use freshness cues - even in processed categories when able to do so legitimately – are likely to benefit from increased trust and positive perception.

### 3. Hybrid eating behaviours are the new normal

Consumers no longer follow rigid dietary identities. Instead, they blend behaviours across cooking sometimes, eating convenience foods sometimes, reducing meat but not eliminating it, and balancing indulgence with health goals rather sacrificing it entirely.

This hybrid behaviour creates space for flexible food solutions that can support consumers in their more varied lifestyles and dietary routines.

# 5.2 WHERE FMCG FOOD BRANDS CAN WIN IN 2026

Based on the data analysis and wider industry trends, several innovation opportunities are emerging which FMCG food brands could look to explore in the coming year. These opportunities align with demand drivers associated with convenience, health, flexibility and experimentation. However, it is key for brands to recognise that costs will remain an underlying consideration for consumers, and the most successful brands will be those who balance new innovations in the market with balanced, consumer-aligned, value for money.

## 1. Healthy convenience

This is perhaps the largest whitespace opportunity in the current UK market, with consumers actively seeking convenience foods that feel healthier and less processed.

Opportunities include:

- healthier ready meals
- minimally processed meal kits
- protein-rich convenience foods
- fresh-prepared grab-and-go meals
- minimally processed and pre-portioned snacks

Retailers are already investing heavily in this space, and brands that lead in this area could define the next generation of convenience.

## 2. Functional snacking

Snacking continues to grow, but consumers increasingly expect snacks to deliver benefits beyond taste.

Functional snack innovation opportunities can align closely with health convenience, and include:

- protein snacks
- gut-health foods
- vitamin-fortified products
- energy-support snacks

This category combines indulgence with wellness and is set to grow significantly based on current UK consumer priorities and value perceptions.

# 5.2 WHERE FMCG FOOD BRANDS CAN WIN IN 2026 CONTINUED...

## 3. Global flavour exploration

Consumers increasingly seek culinary discovery and authentic global flavours, with social media playing a significant role in driving these trends.

Opportunities include:

- international snack flavours
- fusion sauces
- global ready meals
- culturally authentic product ranges

Brands that can tap into global flavours and taste experiences, but in more authentic ways, are likely to have strong appeal especially amongst Gen Z consumers.

## 4. Sustainable protein

Alternative proteins remain a small but highly engaged category with strong positive sentiment associations.

Brands could look to innovate in this space, considering opportunities like:

- hybrid meat products
- fermentation-based proteins
- cultured meat technologies

While adoption may be gradual, these innovations represent long-term growth potential and are likely to become increasingly aligned with shifting consumer diets and goals

# 6. THE FUTURE OF THE UK FMCG FOOD MARKET

## 6.1 TRENDS SET TO DRIVE MARKET EVOLUTION

Looking ahead, several macro trends are likely to shape the next decade of food innovation in 2026 and beyond.

### 1. The rise of health transparency

Consumers will increasingly question how foods are produced and processed. Brands that demonstrate authenticity and transparency will gain trust in this anti-UPF market, and several retailers are already moving into this space with minimal-ingredient ranges.

### 2. Technology-enabled food innovation

Advances in food science may reshape categories through alternative proteins, fermentation technologies, and personalised nutrition. These innovations could significantly expand product possibilities and alignment with consumer health priorities.

### 3. The evolution of convenience

Convenience will remain a dominant behavioural driver in the UK. However, the definition of convenience will expand to include nutritional quality, sustainability, and ingredient simplicity as core consumer expectations, not value add-ons.

The next generation of daily convenience foods will likely look very different from today's ready meals, pot noodles, and potato-based crisps.

## 6.2 KEY TAKEAWAYS FOR FMCG LEADERS

The insights throughout this report highlight a food market defined by complexity rather than simplicity.

Consumers are balancing multiple competing priorities at once.

For FMCG brands, the implications are clear.

### 1. Convenience is the dominant behavioural driver

Convenience remains the most powerful influence on food choices.

Consumers increasingly expect food to adapt to their lifestyles, not the other way around. However, traditional convenience foods often suffer from negative perceptions around health and processing.

The opportunity lies in redefining convenience, and the future of convenience will be fast and easy, but transparent and trustworthy.

### 2. Health is evolving from dieting to food quality

Consumers are moving away from restrictive diet culture. Instead, they increasingly focus on the quality of what they put in their bodies and the holistic health benefits of eating 'clean' foods.

This shift explains the rising conversation around ultra-processed foods.

Brands that communicate simplicity, authenticity and transparency are therefore likely to gain competitive advantage in the current health-conscious market.

### 3. Cost sensitivity is still shaping value perceptions

Even as inflation stabilises, consumers remain cautious about food spending. However, shoppers are not simply trading down.

Instead, they are seeking value alignment.

Products that successfully balance quality and affordability can still command strong demand.

### 4. Snacking is redefining eating occasions

Traditional meal structures are weakening. Instead, consumers increasingly eat throughout the day via smaller snacking moments.

# 6.2 KEY TAKEAWAYS FOR FMCG LEADERS CONTINUED...

This creates opportunities for brands that develop products tailored to specific consumption occasions such as breakfast on the go, afternoon energy snacks, and evening comfort foods.

Understanding these micro-moments and where your brand sits in the consumer's day is becoming central to category growth.

## 5. Freshness remains a powerful brand signal

Even in highly processed categories, consumers respond positively to cues associated with freshness.

These cues may include simple ingredient lists, fresh preparation messaging, and visual packaging design.

Brands that successfully communicate freshness often benefit from improved trust.

## 6. Hybrid diets are replacing rigid food identities

Consumers now rarely follow strict dietary labels. Instead, they combine behaviours.

They may eat meat while also purchasing plant-based products. They may also pursue healthy eating while still indulging in snacks.

This flexibility means that brands should design products that fit into multiple dietary contexts rather than targeting narrow identities.

## 7. Innovation will define category leadership

Consumers increasingly expect novelty and experimentation in food. This is especially prevalent amongst Gen Z, who will be a crucial audience segment in redefining future market trends.

FMCG food brands that fail to innovate risk losing relevance, as innovation is becoming a core competitive advantage.

# TURNING INSIGHTS INTO ACTIONS

Throughout this report, one theme has remained consistent: the UK food market is not moving in a single direction.

Consumers are balancing multiple priorities at once - convenience, health, value, experimentation, and trust - often making trade-offs between them from one shopping trip to the next.

For food brands, that creates both complexity and opportunity.

The brands that thrive over the coming years will not simply follow trends. They will understand how these forces interact, and they will design products, experiences, and communications that respond to them with clarity and purpose.

In many cases, that may require a moment of reflection.

Does the brand still reflect what today's consumer values?

Is the product proposition aligned with changing expectations around health, quality or convenience?

Is the brand story being communicated clearly enough in a crowded market?

Is there a viable opportunity to launch new or reformulated products?

These are not just marketing questions; they are strategic ones.

At cobolt studio, this is where our work typically begins.

We partner with FMCG brands to translate market insights into practical brand and growth strategies. Our approach combines consumer research, category analysis, and commercial understanding with the creative disciplines needed to bring those strategies to life.

That might involve:

- Brand audits and strategic repositioning to ensure a brand reflects evolving consumer priorities and market shifts
- Brand identity and packaging design that communicates quality, trust and differentiation on the shelf
- Websites and digital platforms that support modern brand storytelling, product discovery, and direct sales
- Marketing strategy and campaigns grounded in real consumer behaviour and category insight

The goal is always the same: helping brands move forward with confidence and grow in a rapidly changing market.

Because while understanding the future of food is important - building brands that thrive within it is where the real work begins.

**KEY TAKEAWAY**

If this report sparks questions about where your brand goes next - from positioning and packaging to digital experience and growth strategy - we'd love to talk.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**Secondary Sources:**


1. 1KPMG UK Consumer Pulse Report 2. Deloitte Consumer Tracker 3. Mintel UK Food & Drink Trends 4. The Grocer – Future of Food Report 5. EY Future Consumer Index 6. BCG Consumer Innovation Insights 7. Mintel UK Food & Drink Reports 8. The Grocer Bakery Market Analysis 9. BCG Protein Transition Report


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Meticulously researched and written by **Charlotte Weeks, Market Research Manager**, who definitely deserves a doughnut after this.