



**Euromonitor
International**

Fresh Food in China

December 2025

Table of Contents

Fresh Food in China

EXECUTIVE SUMMARY

Health concerns fuel demand for fresh food

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Bright performance for fresh foods

Economic uncertainty leads to downtrading across categories

WHAT'S NEXT?

Positive evolution shaped by urbanisation and plant-based diets

Distribution is set to evolve with the adoption of digital technologies

Sustainable features to underpin evolution of branding strategies

CHANNELS

Small local grocers face growing competition from modern channel

Impressive performance for retail e-commerce

Contrasting performance between retail and foodservice channels

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable performance for eggs

INDUSTRY PERFORMANCE

Eggs support consumers in period of economic uncertainty

Premiumisation trend is embraced targeting affluent consumer base

WHAT'S NEXT?

Staple egg consumption will support category performance

Convenience trend to be addressed by producers

Summary 2 - Major Processors of Eggs 2025

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2020-2025
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025
- Table 17 - Retail Sales of Eggs: Volume 2020-2025
- Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025
- Table 19 - Retail Sales of Eggs: Value 2020-2025
- Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030
- Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030
- Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030
- Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fish and Seafood in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fish and seafood enjoys solid growth

INDUSTRY PERFORMANCE

Shifting health priorities drive sales of fish and seafood
Cost and climate change weigh on purchasing decisions

WHAT'S NEXT?

Fish and seafood to benefit from daily health priorities and new consumption occasions
Premiumisation trend is set to shape seafood

Summary 3 - Major Processors of Fish and Seafood 2025

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fruits in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fruits consumption climbs amid stronger emphasis on healthy eating

INDUSTRY PERFORMANCE

Fruits category reaps the rewards of strong demand and local supply

Economic and climate factors weigh on purchasing decisions

WHAT'S NEXT?

Significant growth potential for the fruits category

Packaged and prepared fruits will raise the bar on convenience

Summary 4 - Major Processors of Fruits 2025

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meat in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Meat volume sales under pressure in the retail channel

INDUSTRY PERFORMANCE

Meat consumption trends are evolving in China

Convenience and sustainability shape demand patterns

Foodservice meat sales rise amid stronger preference for dining out and less home cooking

WHAT'S NEXT?

Changing dietary preferences to weigh on meat consumption

Premiumisation and branding are key strategies to counter decline in retail channel

Summary 5 - Major Processors of Meat 2025

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030

Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Nuts in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Versatility of nuts drives sales growth

INDUSTRY PERFORMANCE

Nuts become part of China's healthy snacking culture

Rising demand for plain nuts

WHAT'S NEXT?

Strong outlook for the nuts category

Convenience formats will be leveraged to address modern lifestyle demands

Summary 6 - Major Processors of Nuts 2025

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025

Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025

Table 71 - Retail Sales of Nuts by Category: Value 2020-2025

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Pulses in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pulses witness strong growth in sales

INDUSTRY PERFORMANCE

Pulses gain appeal as a cheap and nutritional plant-based food

Pulses resonate with the needs of budget-conscious households

WHAT'S NEXT?

Public health strategies and ageing population to support higher intake of pulses
Convenience products are key to winning over consumers
Summary 7 - Major Processors of Pulses 2025

CATEGORY DATA

- Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025
- Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025
- Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025
- Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025
- Table 84 - Retail Sales of Pulses by Category: Value 2020-2025
- Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025
- Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025
- Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030
- Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030
- Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030
- Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030
- Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030
- Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Starchy Roots in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Nutritional benefits ensures steady demand for starchy roots

INDUSTRY PERFORMANCE

Root vegetables face competition from staple foods
Relatively stable demand for starchy roots in 2025

WHAT'S NEXT?

Stable outlook for starchy roots
Modern lifestyles require convenience formats
Summary 8 - Major Processors of Starchy Roots 2025

CATEGORY DATA

- Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025
- Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025
- Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025
- Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025
- Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025
- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pressure for traditional sugar as health concerns intensify

INDUSTRY PERFORMANCE

Sugar intake is curbed amid health concerns

Challenging landscape for players in the sugar category

WHAT'S NEXT?

Cleaner more natural alternatives offer growth opportunities

Monk fruit sweetener has strong growth potential due to its health benefits.

Summary 9 - Major Processors of Sugar and Sweeteners 2025

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Vegetables in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fresh vegetables benefit from health halo

INDUSTRY PERFORMANCE

Supply disruptions drive up retail prices in 2025

Concerns over ultra-processed foods nurtures demand

WHAT'S NEXT?

Bright outlook for vegetables

Convenience products will be key to meeting the demands of fast-paced consumer lifestyles

Summary 10 - Major Processors of Vegetables 2025

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025
Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030
Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030
Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030
Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030
Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030
Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/fresh-food-in-china/report.