



Processed Fruit and Vegetables in China

November 2025

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Processed Fruit and Vegetables in China - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stronger competition from fresh produce linked to health trends

INDUSTRY PERFORMANCE

Sales in shelf stable fruit recede to pre-pandemic level

Rising health awareness undermines demand

WHAT'S NEXT?

Foodservice volumes of frozen processed potatoes expected to grow thanks to expansion in chained fast-food restaurants

Struggling to resonate with evolving health trends

Redefining processed fruit with herbal infusions and clean labels

COMPETITIVE LANDSCAPE

The competitive landscape remains stable

Image problems and lack of innovation

CHANNELS

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Ongoing e-commerce growth, but penetration remains relatively limited

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Private label gaining share while health is also in focus

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INDUSTRY PERFORMANCE

Maturity and economic conditions constrain growth

Demographic developments boost demand for breakfast cereals

WHAT'S NEXT?

Maturity remains a key factor

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