

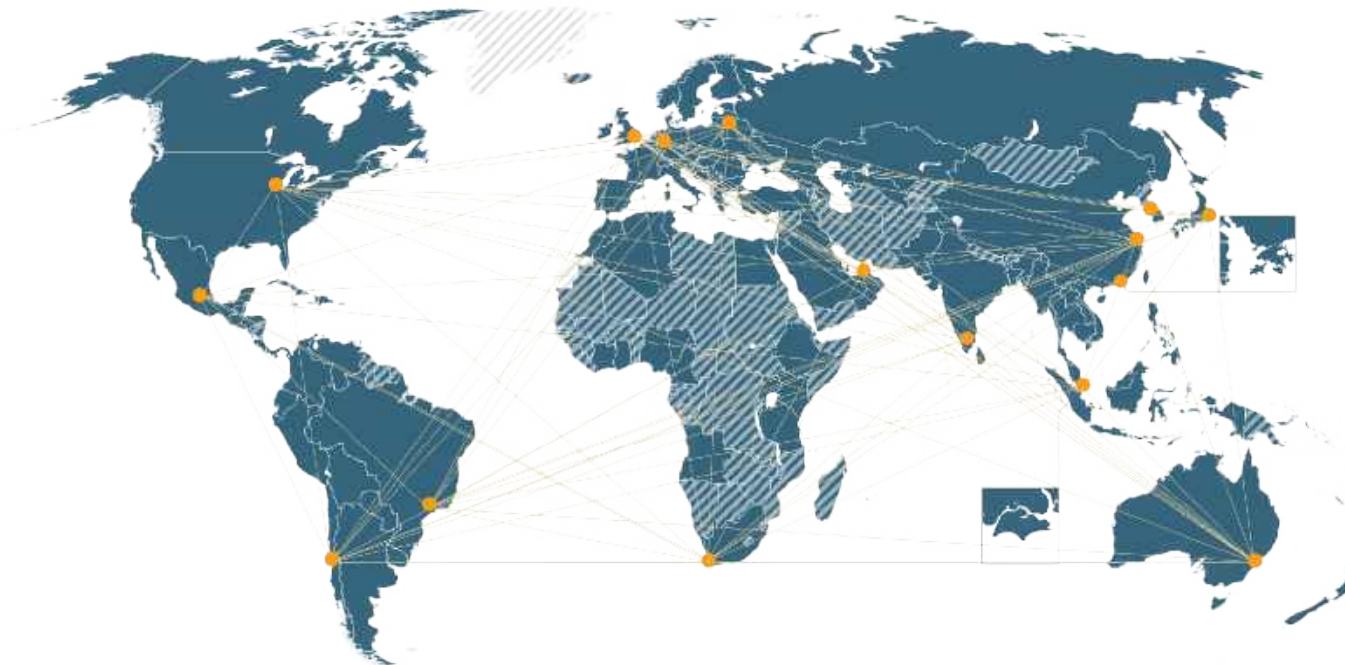
The Outlook for Global Food Demand 2025-2030: Navigating the Changing Consumer Landscape

June 2026

Matthew Barry

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About the speaker



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Matthew Barry is a Global Insight Manager at Euromonitor International, specializing in food and beverages products. He has over a decade of experience in the industry and his analysis of the industry is often shared in business and trade press, including The Wall Street Journal, The Economist, and The New York Times. He presents regularly to industry groups like the International Coffee Organization, the International Fresh Produce Association, and the International Dairy, Deli, and Bakery Association. He holds a bachelor's degree from Knox College and a master's degree from Harvard University's Extension School.

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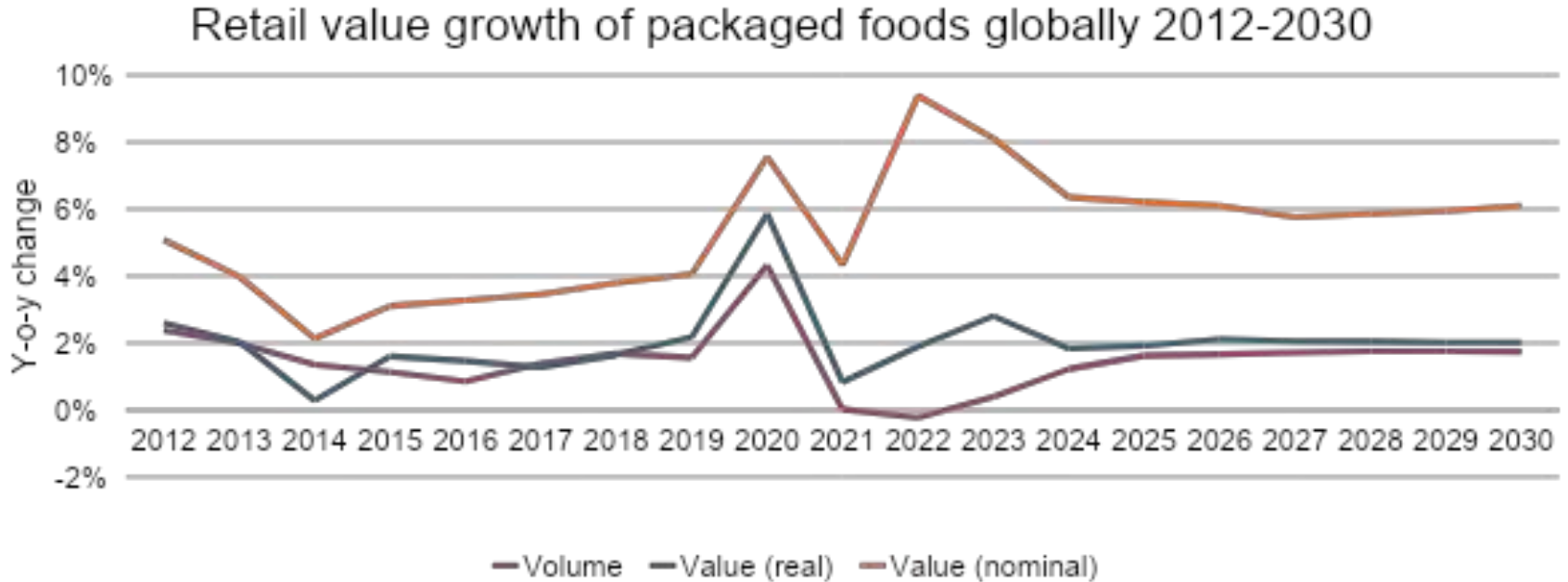
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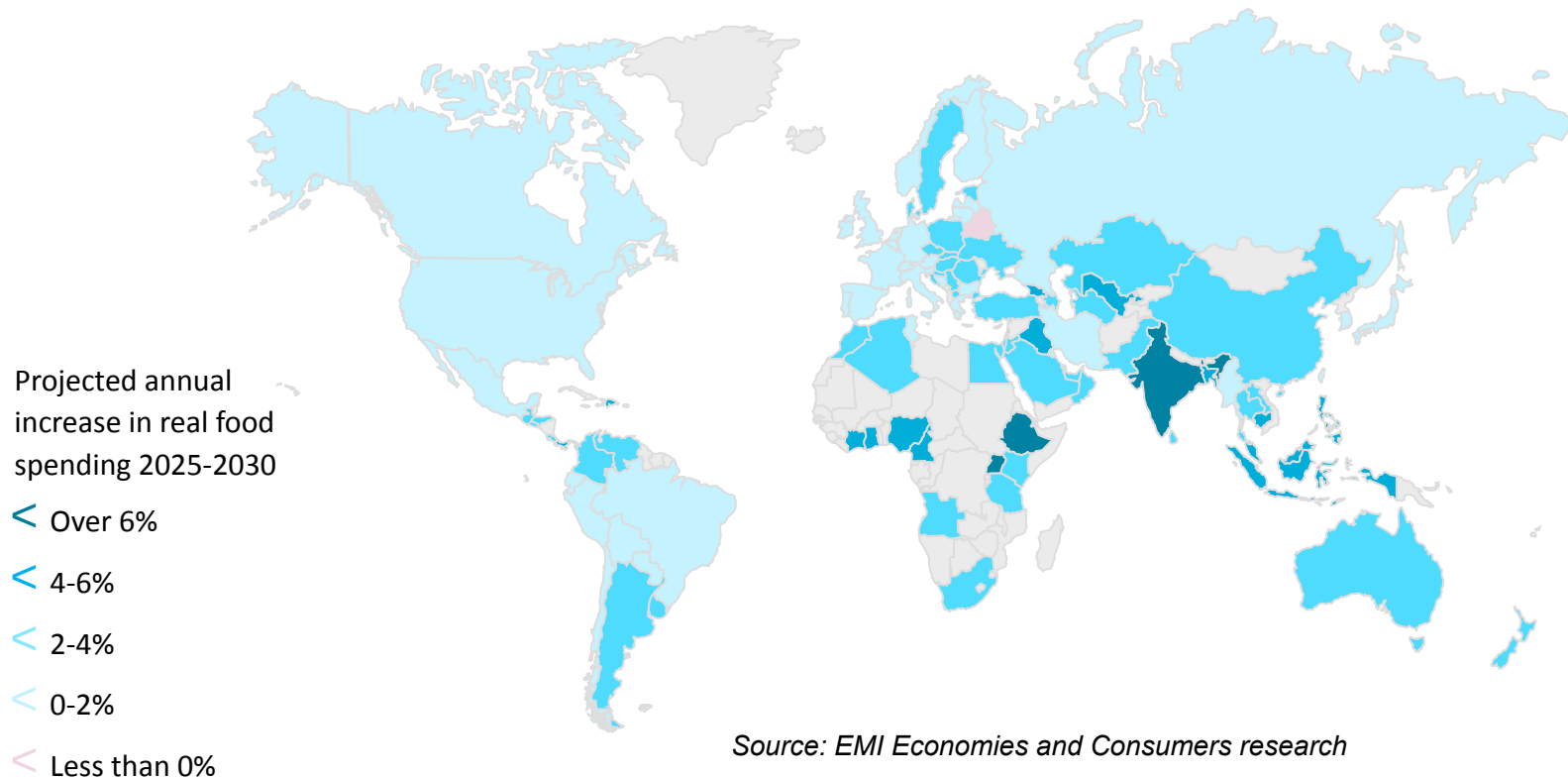
The outlook for demand: 2025-2030

Industry growth has slowed down significantly



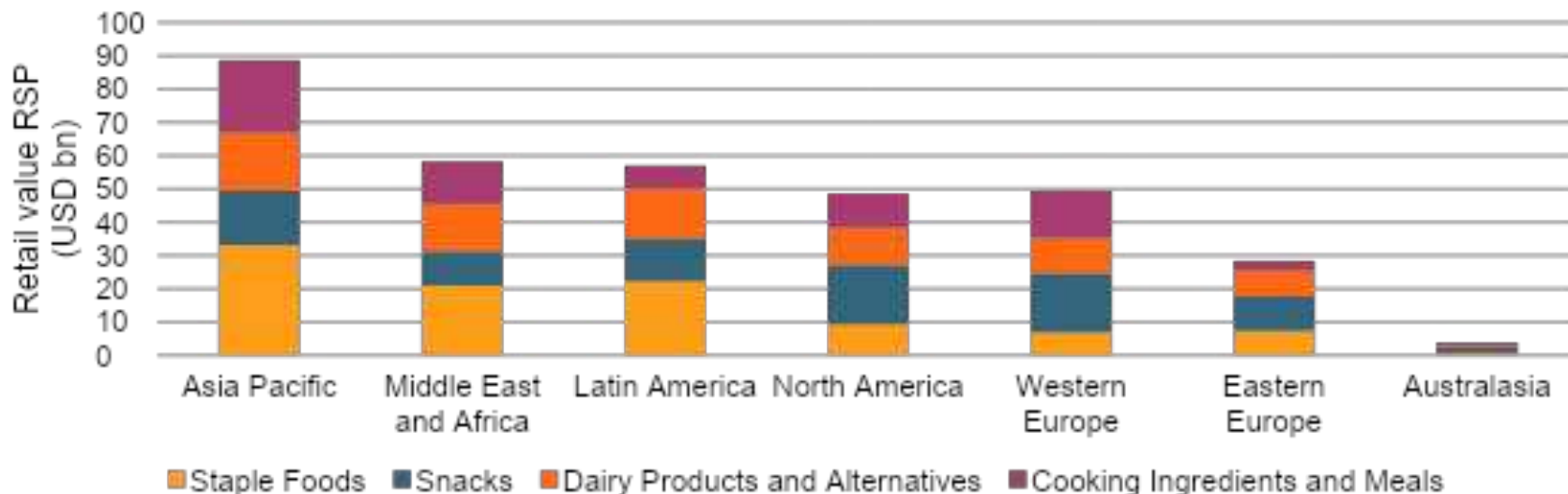
Source: EMI Packaged Foods research

Food spending is on the rise in nearly all the world



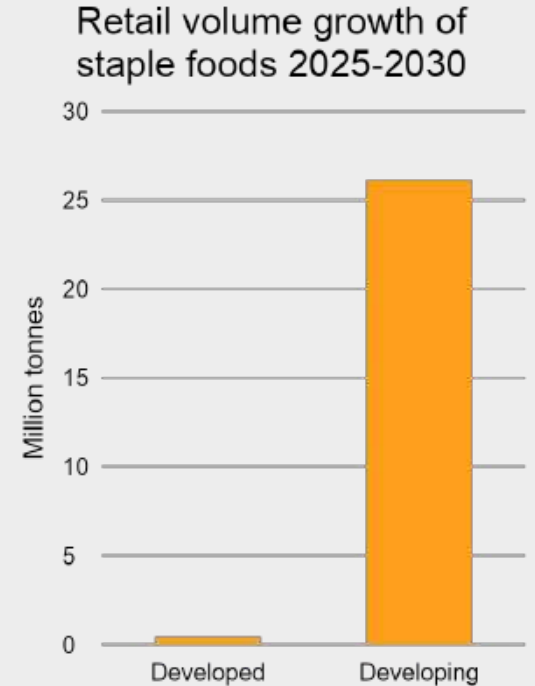
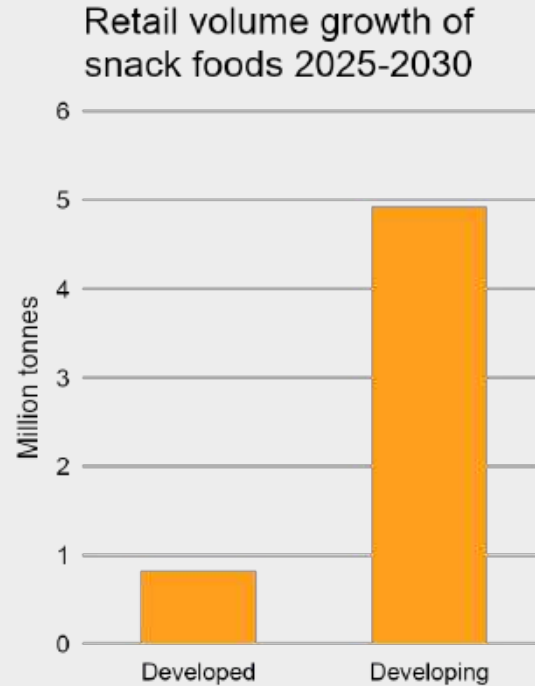
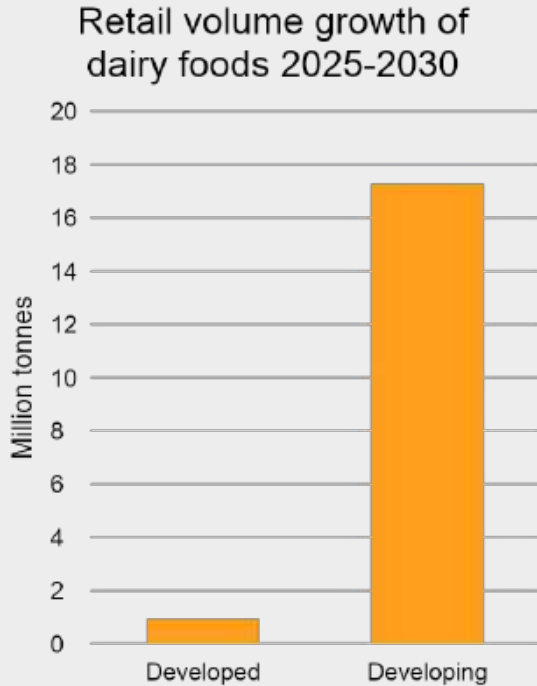
Developing countries are pulling ahead in importance

Retail value growth of packaged foods by sub-category and region 2025-2030



Source: EMI Packaged Foods research

In volumes it is much sharper



Source: EMI Packaged Foods research. "Dairy" includes dairy alternatives.

Market maturity



GLP-1 use



Migration shifts



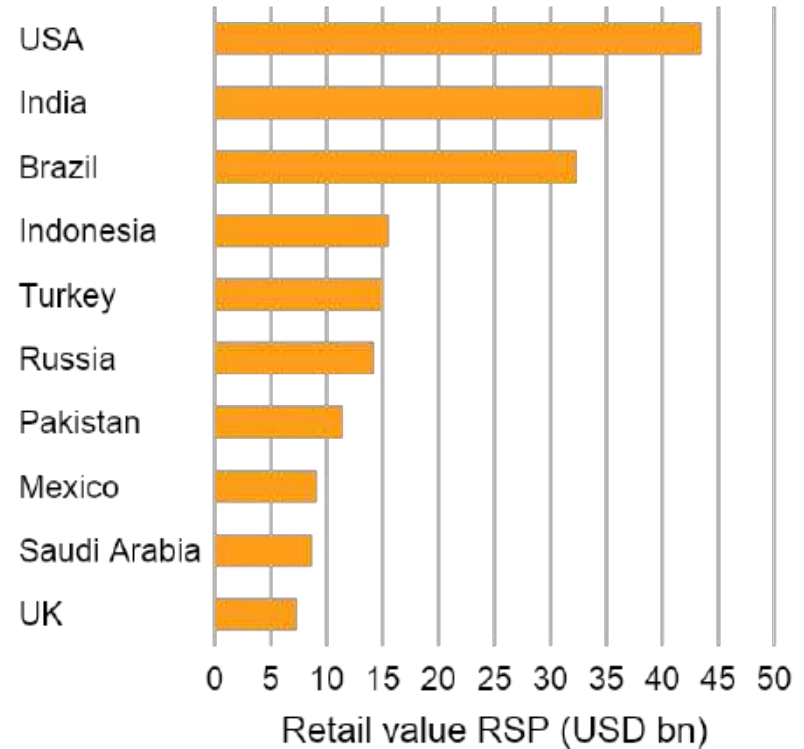
Fertility decline



The US remains the key growth market-for now

Beneath that though, the top markets are nearly exclusively developing countries like India and Brazil

Top growth markets in packaged food 2025-2030

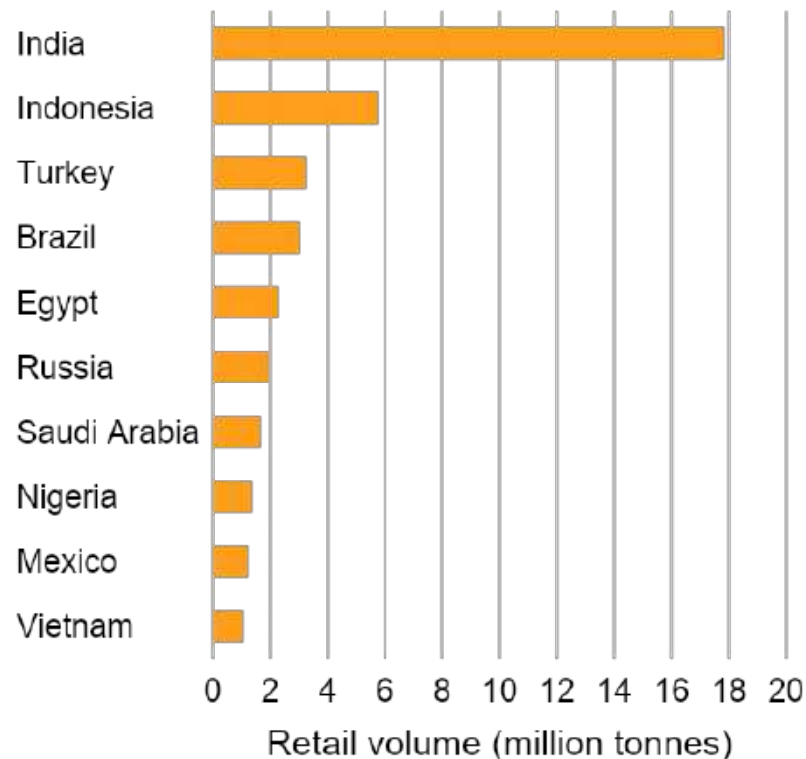


Source: EMI Packaged Foods research

In volume terms though the US drops away

India will drive 29% of global volume growth by itself in the forecast period. Europe and North America will contribute little, if anything at all

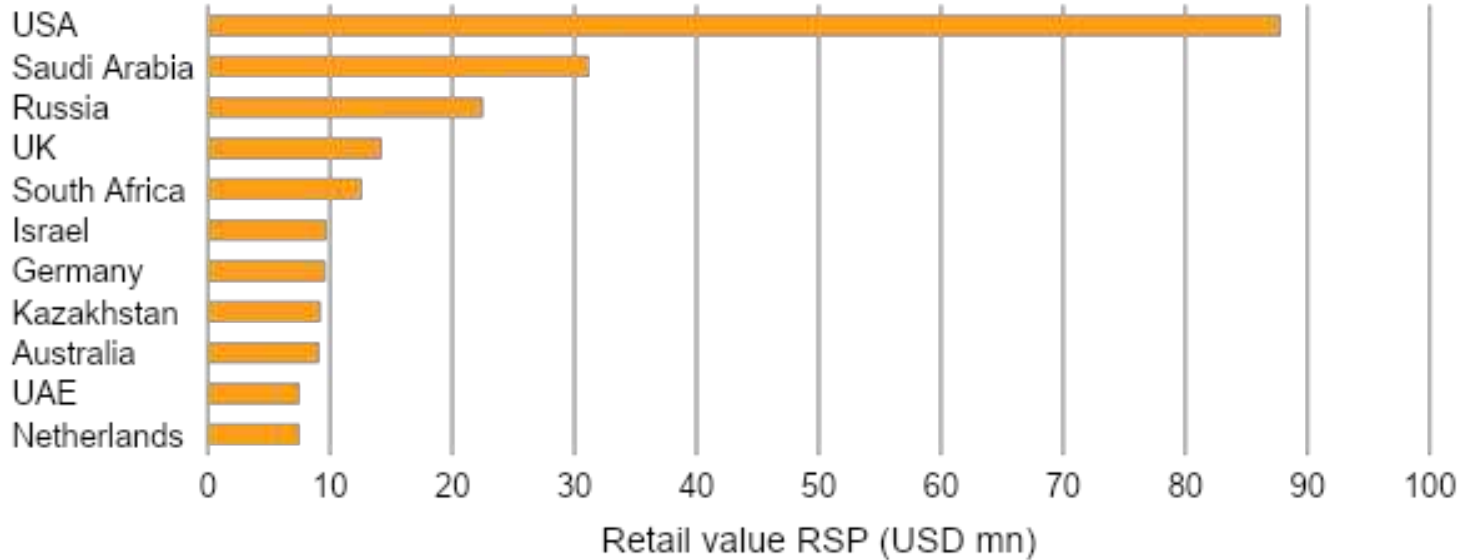
Top growth markets in packaged food 2025-2030



Source: EMI Packaged Foods research

Though this varies by category of course

Retail sales growth of shelf-stable tomatoes 2025-2030

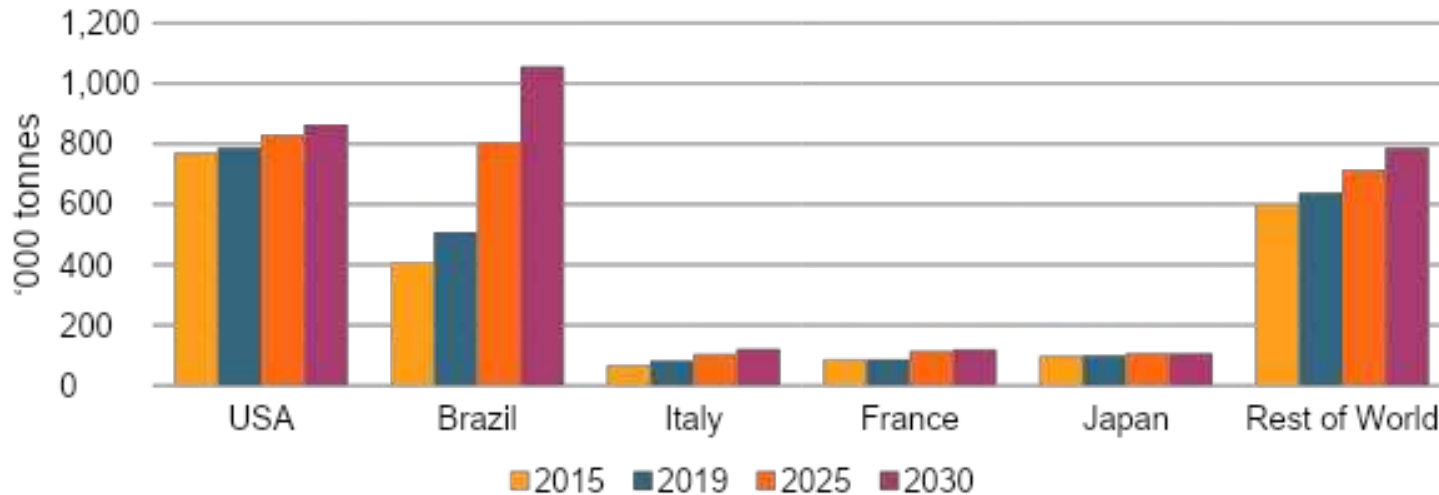


Source: EMI Staple Foods research



The long-term shift is clear

Retail volume sales of pasta sauces globally 2015-2030



Source: EMI Cooking Ingredients and Meals research

Volume growth is nearly
entirely coming from
developing regions-
spending
growth is more split

Consumer trends

Affordability



Wellness



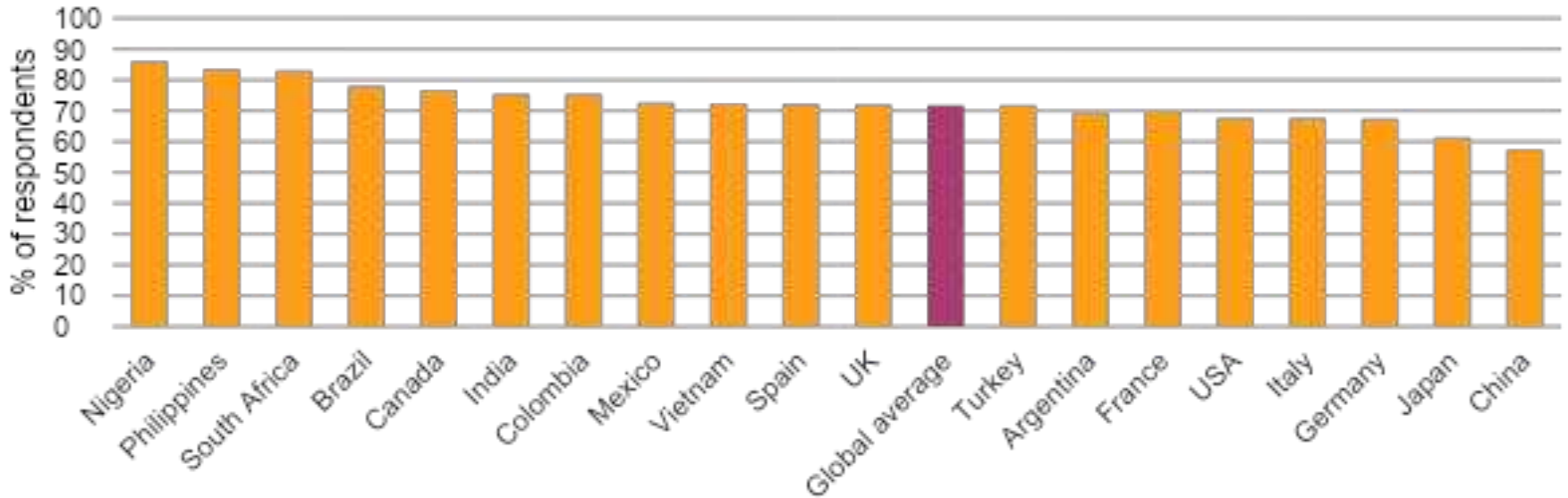
Convenience



Every consumer trend
comes in the context of
affordability

The cost of essentials is the number one consumer concern

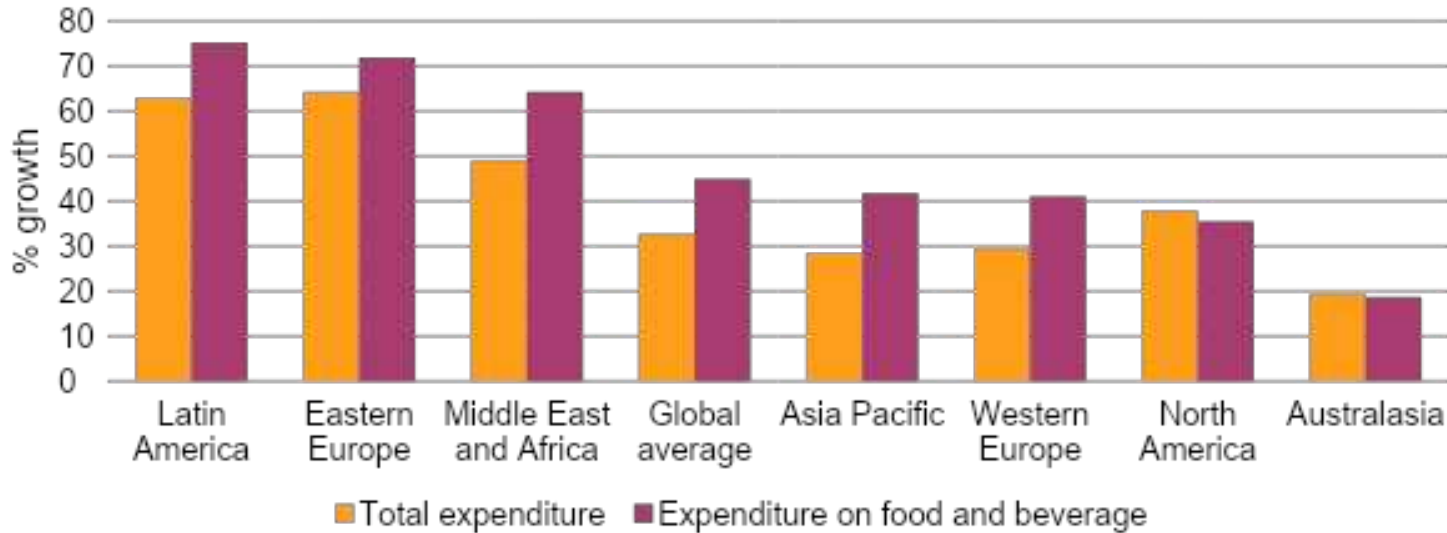
Agreement with the statement “I am concerned that the cost of everyday items I buy is going up” (2026)



Source: EMI Voice of the Consumer Lifestyles. n=40,225

Price levels have risen and not gone down

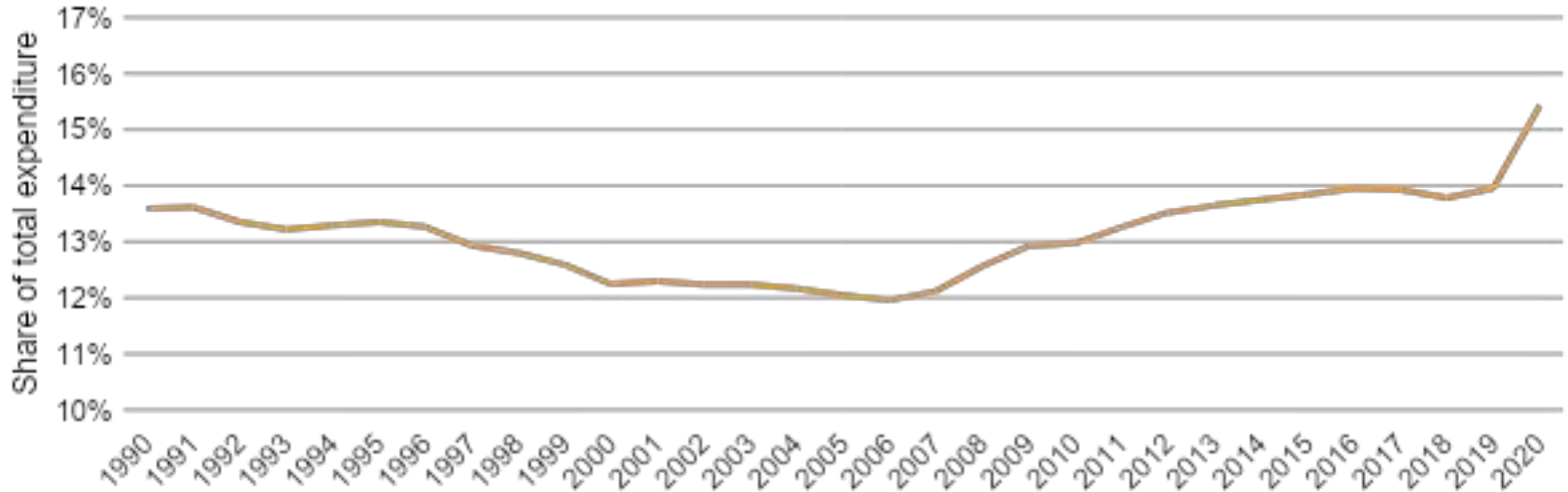
Change in consumer expenditure of the average household by region 2019-2025



Source: EMI Economies and Consumers research. US dollar terms, fixed 2025 exchange rate

This is counter to the historical trend

Share of global consumer expenditure going towards food and non-alcoholic beverages 1990-2020



Source: EMI Economies and Consumers research. US dollar terms, fixed 2025 exchange rate

De-globalization



Climate change



Pricing-led strategies

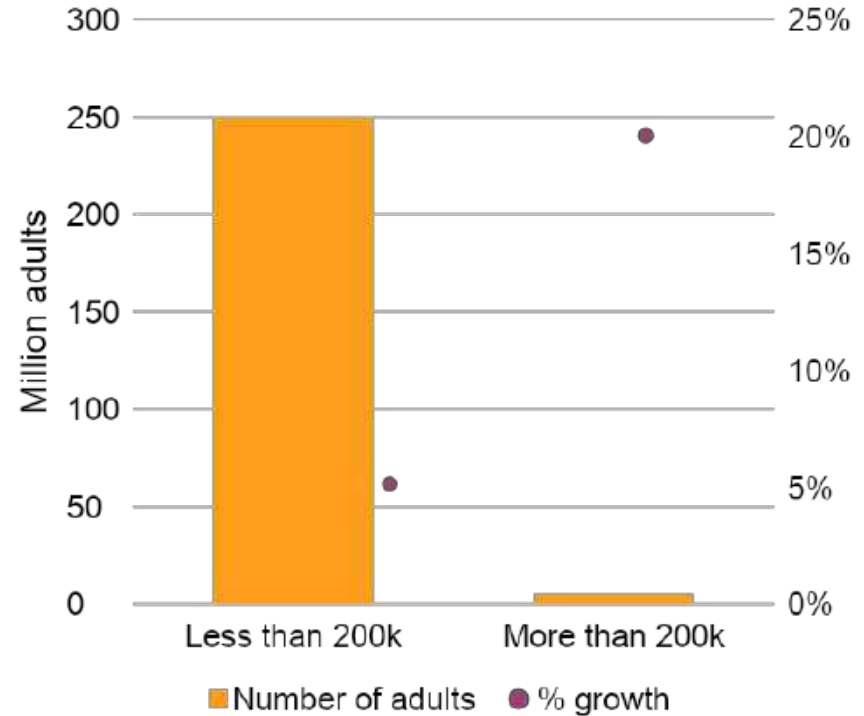


What are the implications of this?

It has created “K-shaped” spending patterns

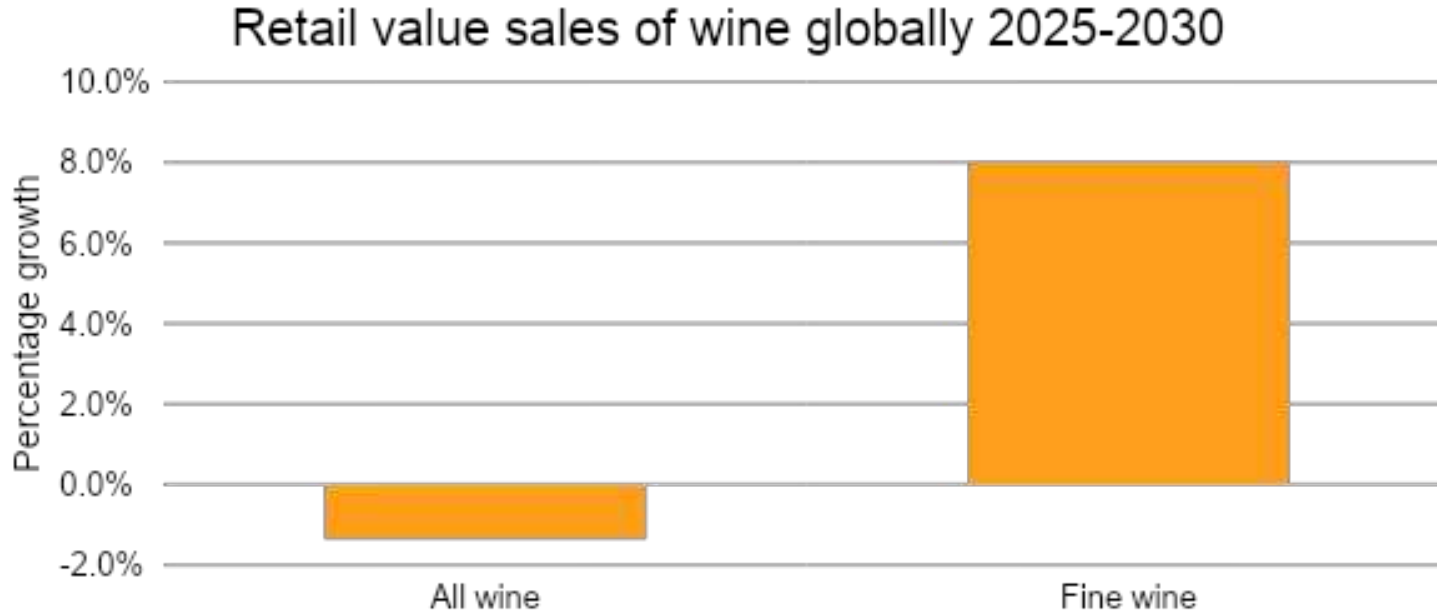
Premiumisation is under pressure, but on the very high-end, things are still generally going just fine

Change in number of global adults by income level (real USD terms) 2025-2030



Source: EMI Income and Wealth Tool. Only for 85 tracked markets.

Many categories show these K-shaped patterns



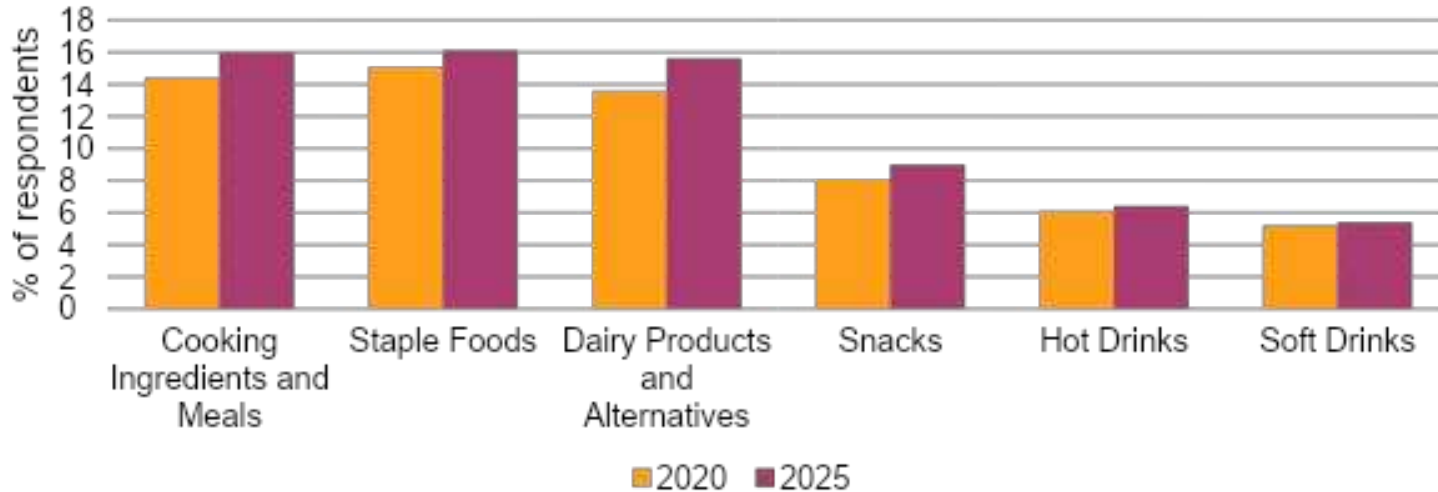
Source: EMI Alcoholic Drinks research



Consumers around the world will look for affordability but it will look different based on local conditions

It has provided a huge push to private label

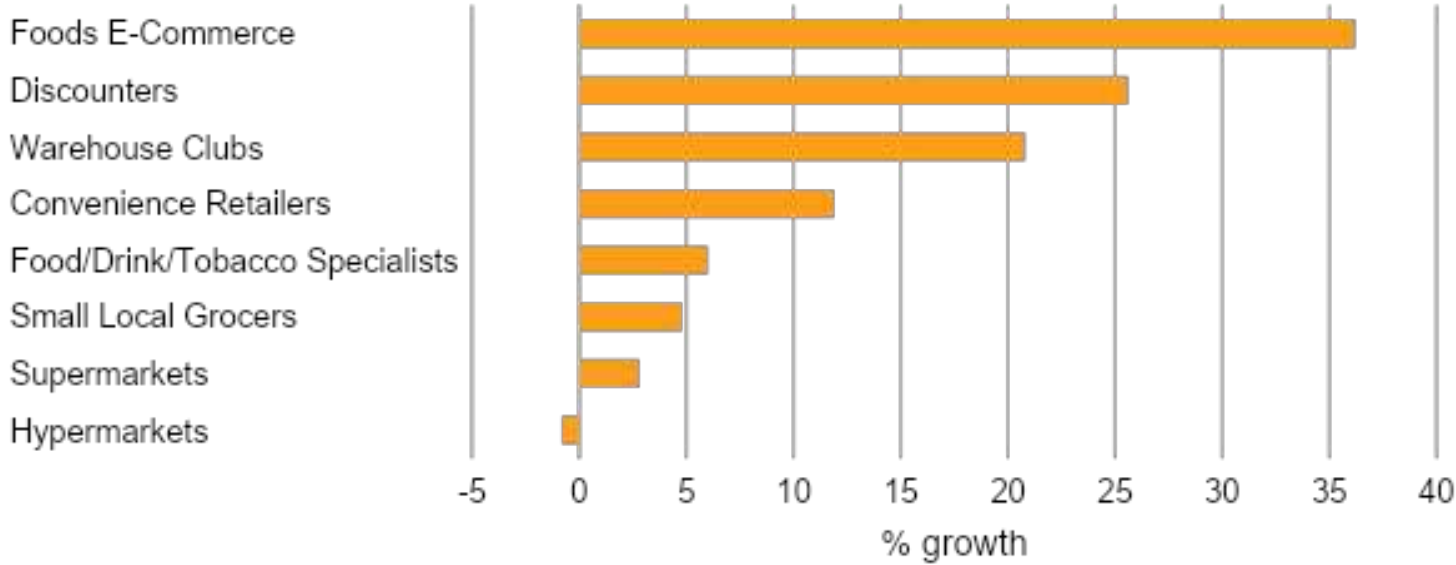
Private label share growth globally by segment 2020-2025



Source: EMI food and drink research

It is accelerating a shift in where food is purchased

Retail value sales growth of grocery retailers globally 2025-2030

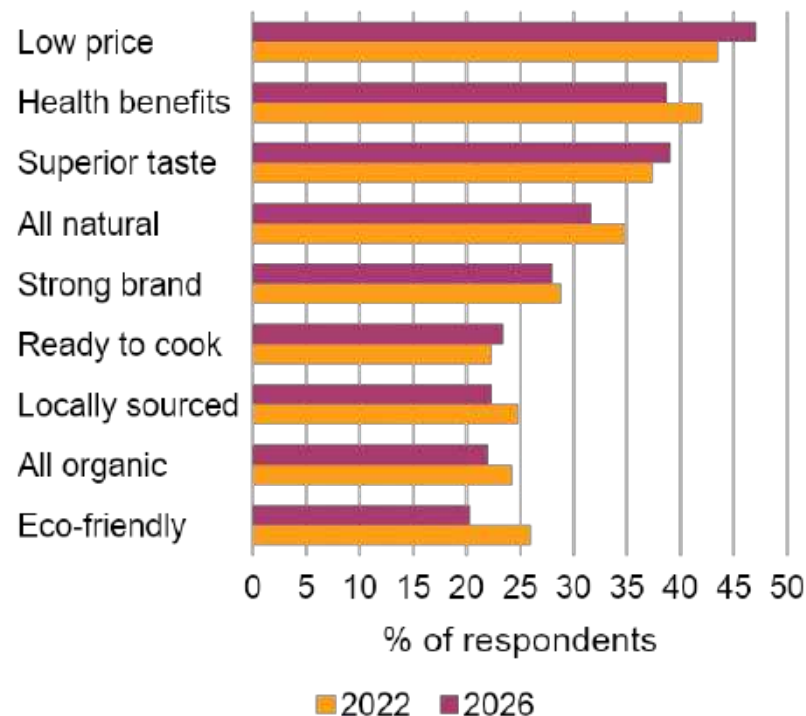


Source: EMI Retail

And it is pressing on every attribute that is not price

Low price alone has made significant gains in consumer interest since the pandemic ended, though taste has lately been reversing earlier losses

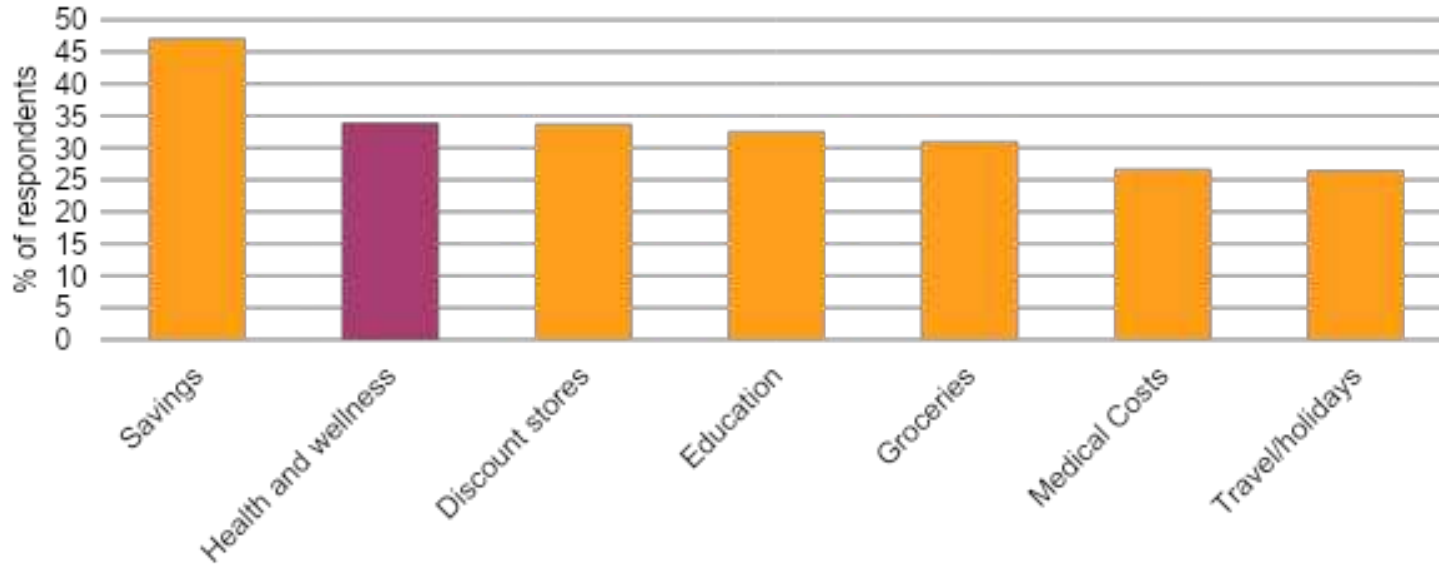
Influential product features in food and beverage products (Global results)



Source: EMI Voice of the Consumer Lifestyles. n=40,225

Wellness still stands out as a financial priority

"In the next 12 months, which do you plan to put more money towards?"
(Global adults, 2026)



Source: EMI Voice of the Consumer Lifestyles. n=39,949

Protein



GLP-1 impact



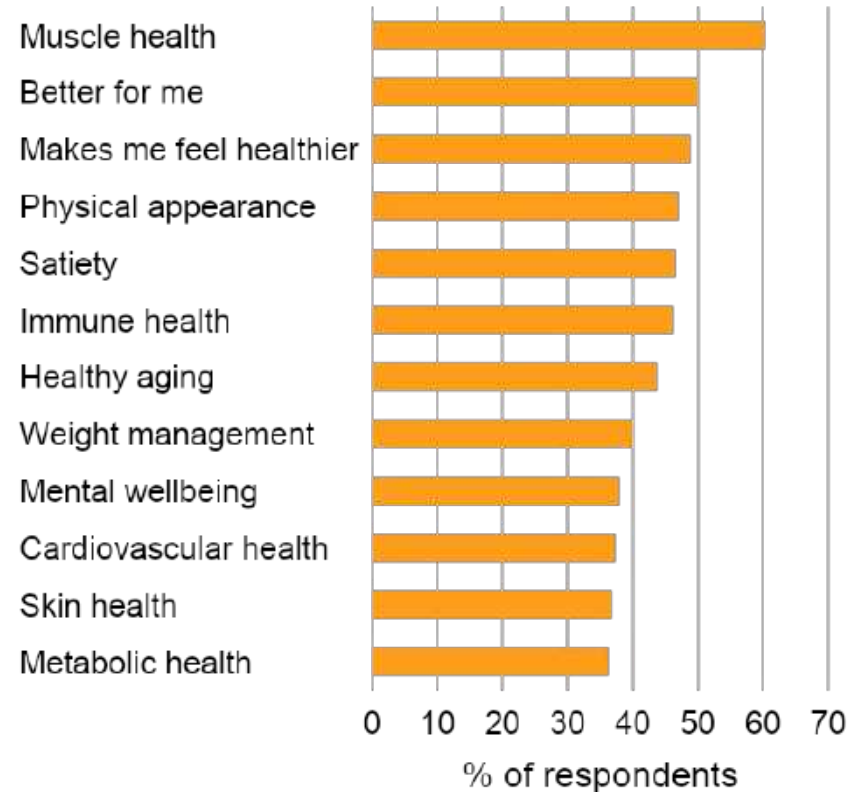
The UPF backlash



Protein has become the skeleton key to health

Consumer demand comes from the well-researched to the entirely imagined and everywhere in between

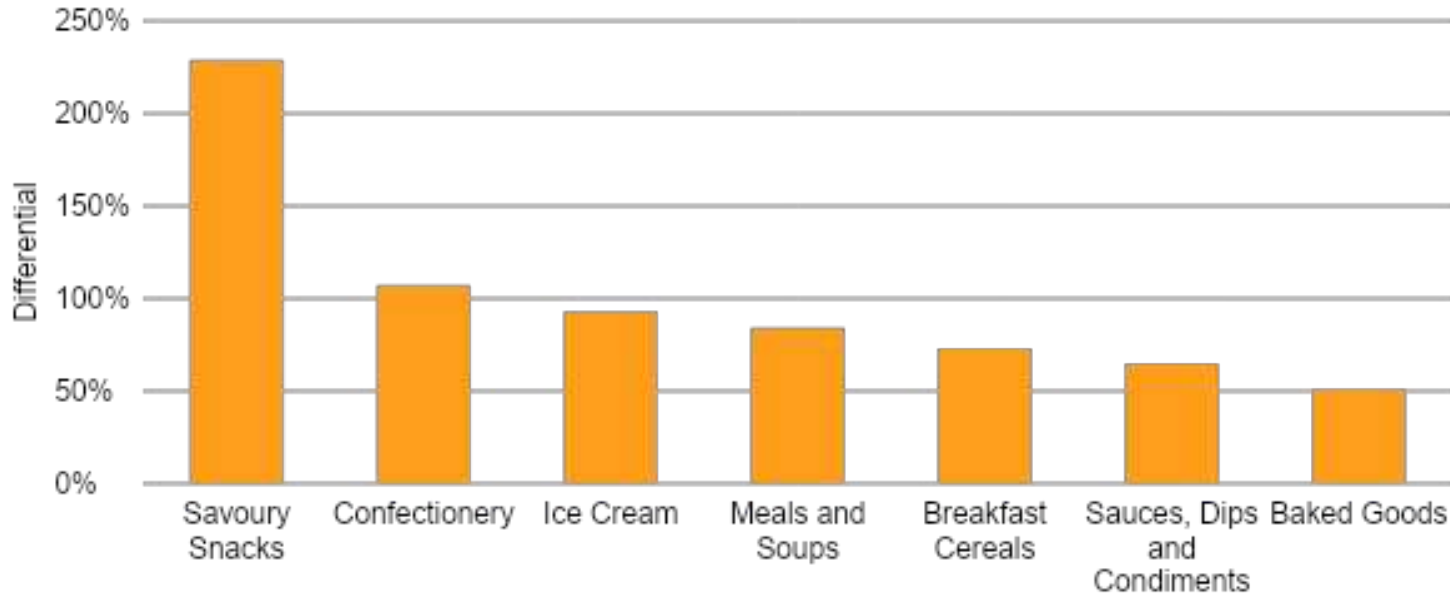
Selected reasons given for seeking protein (2026)



Source: EMI Voice of the Consumer Health and Nutrition.
n=4,603

And a reliable upsell for the industry

Retail price differential between high-protein and standard variants of select packaged foods categories (2024)



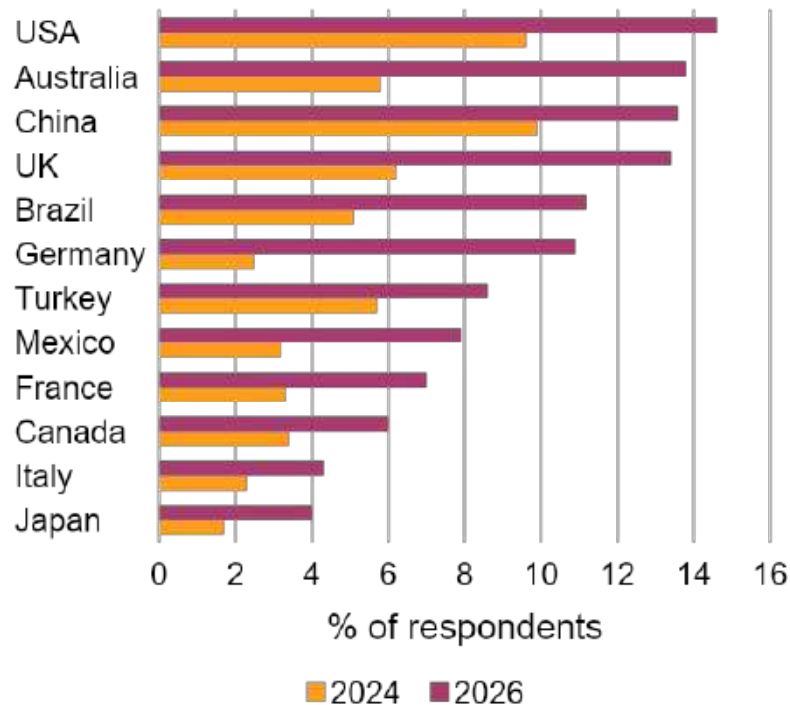
Source: EMI Health and Wellness research

Protein demand will continue to grow, but watch for the bubble-like nature of some of demand

GLP-1 usage is surging globally

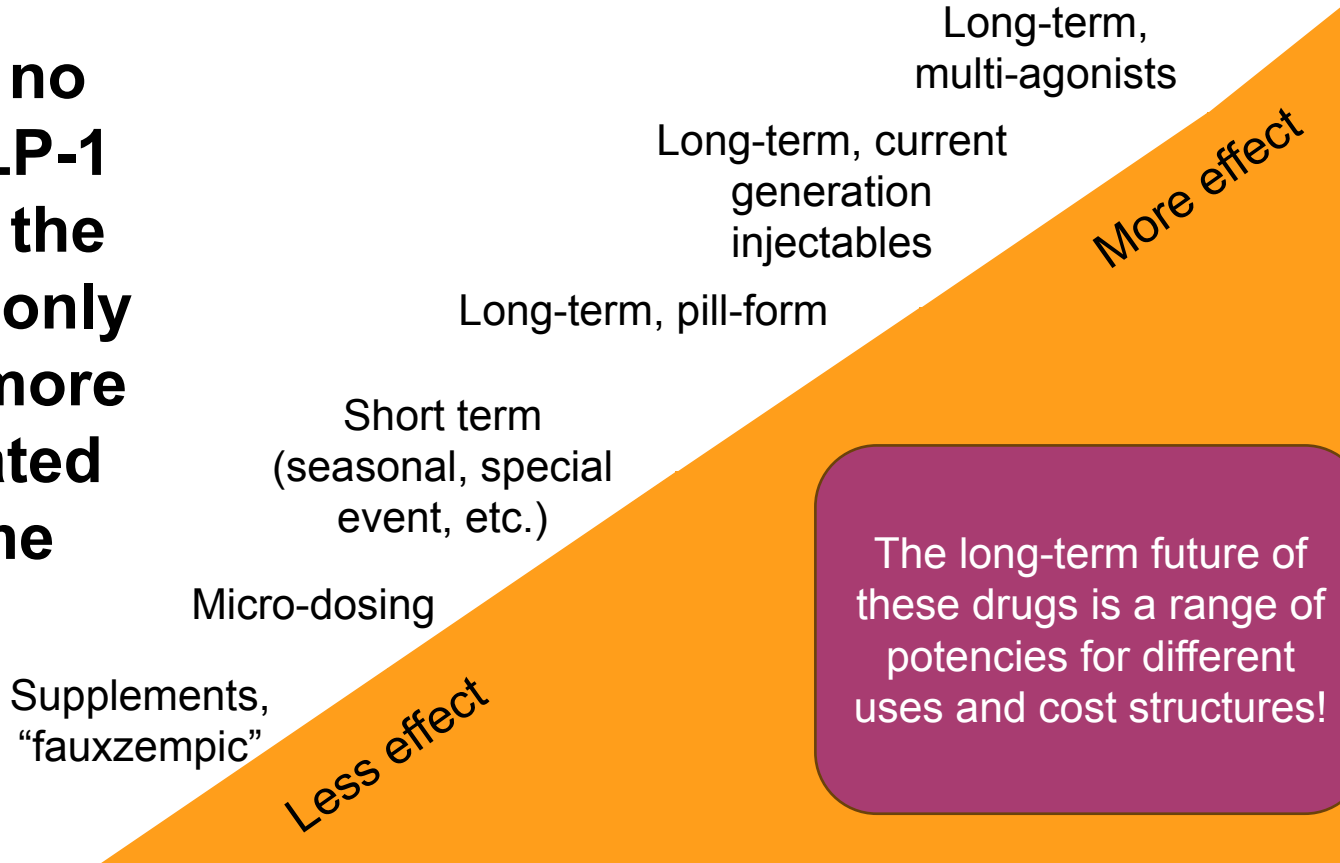
Pill forms, more powerful multi-agonists, and the expiration of patent protections are expanding the reach of these drugs across the world, disrupting eating habits as they go

Share of adults trying to lose weight using a GLP-1 drug to do so

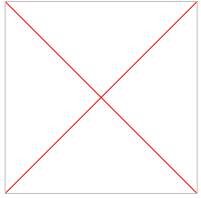


Source: EMI Voice of the Consumer Health and Nutrition

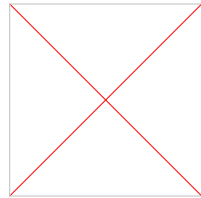
There is no single GLP-1 user and the picture is only growing more complicated with time



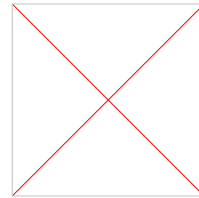
So what does that mean?



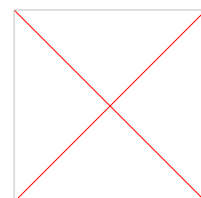
Volume declines



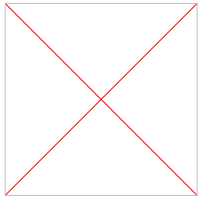
Rising protein demand



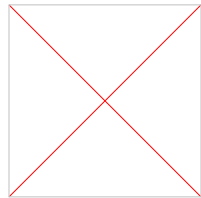
Interest in gut health



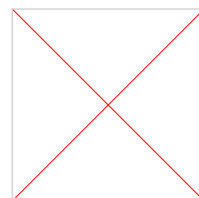
Hydration concerns



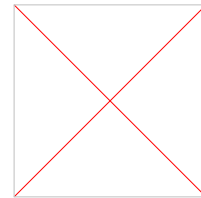
Mindful alcohol consumption



Preference for nutrient density



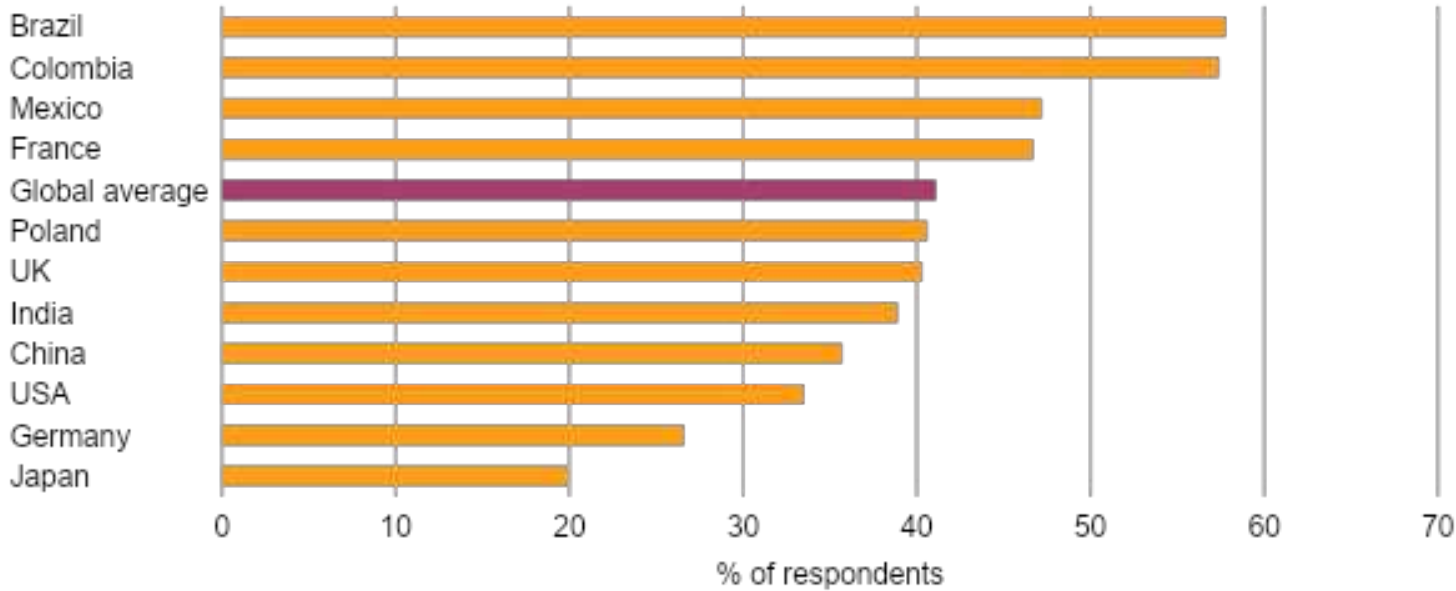
Portion control



Skin health

Pressure is growing on processed foods

Share of adults reporting trying to avoid ultra-processed foods (2026)



Source: EMI Voice of the Consumer Health and Nutrition. n=12,204

Though regulators are the more immediate issue

California enacts nation's first law to define and ban ultraprocessed foods

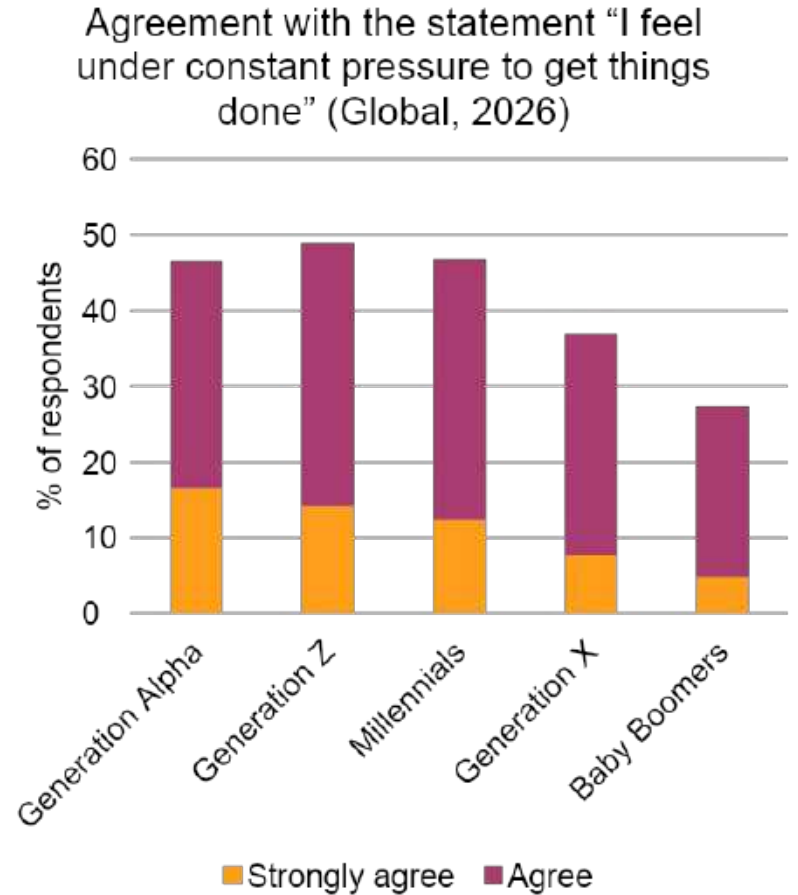
The most ambitious 'health tax' in Latin America debuts in Colombia

EU's 'sin industries' brace for tax battle as Brussels weighs new health-based levies

Source: CNN, El Pais English, and EU Reporter

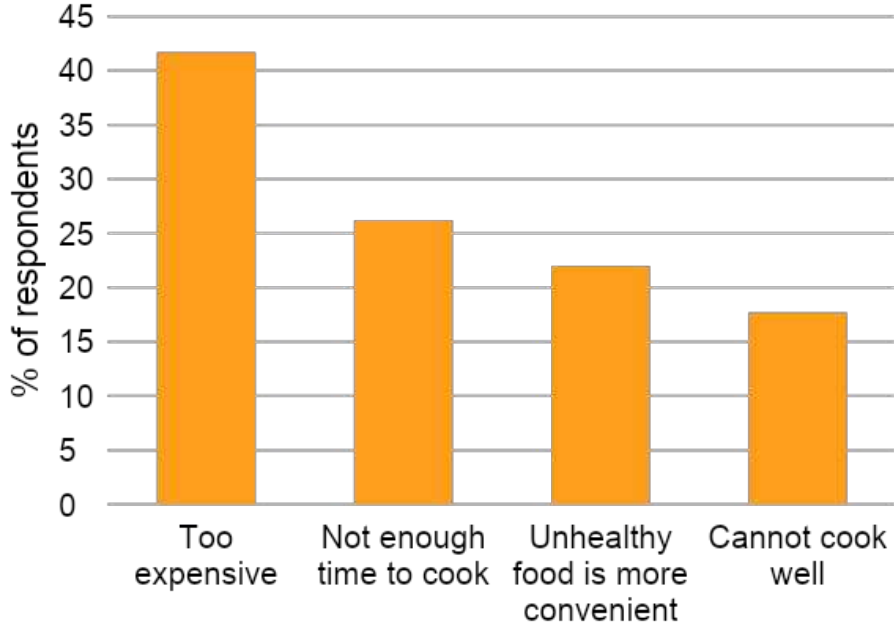
Processing exists for many reasons though-and one is that it makes food much more convenient

Even as consumers try to save money, the demands of modern life have not gotten any easier and convenience remains paramount



Source: EMI Voice of the Consumer Lifestyles. n=40,225

Top reasons given for not being able to follow a healthier diet (Global, 2026)

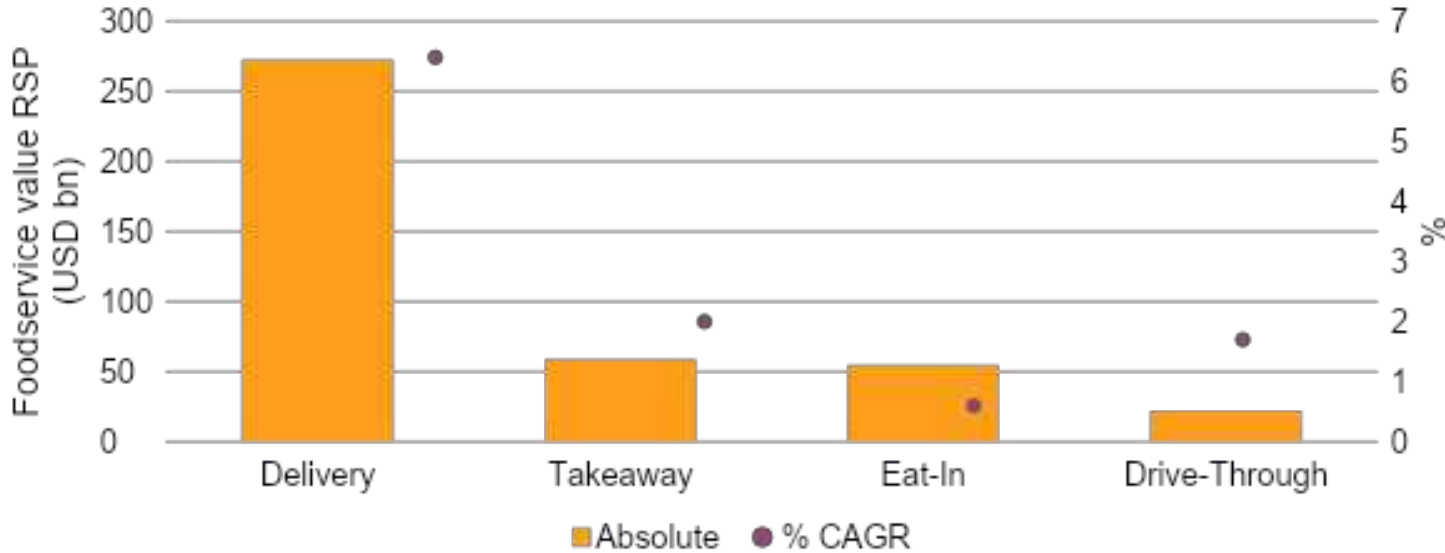


The tension between value, wellness, and convenience will be the defining consumer trend of the coming years

Source: EMI Voice of the Consumer Health and Nutrition. n=12,204

Affordability concerns are not slowing delivery

Foodservice value sales growth globally by fulfilment 2025-2030

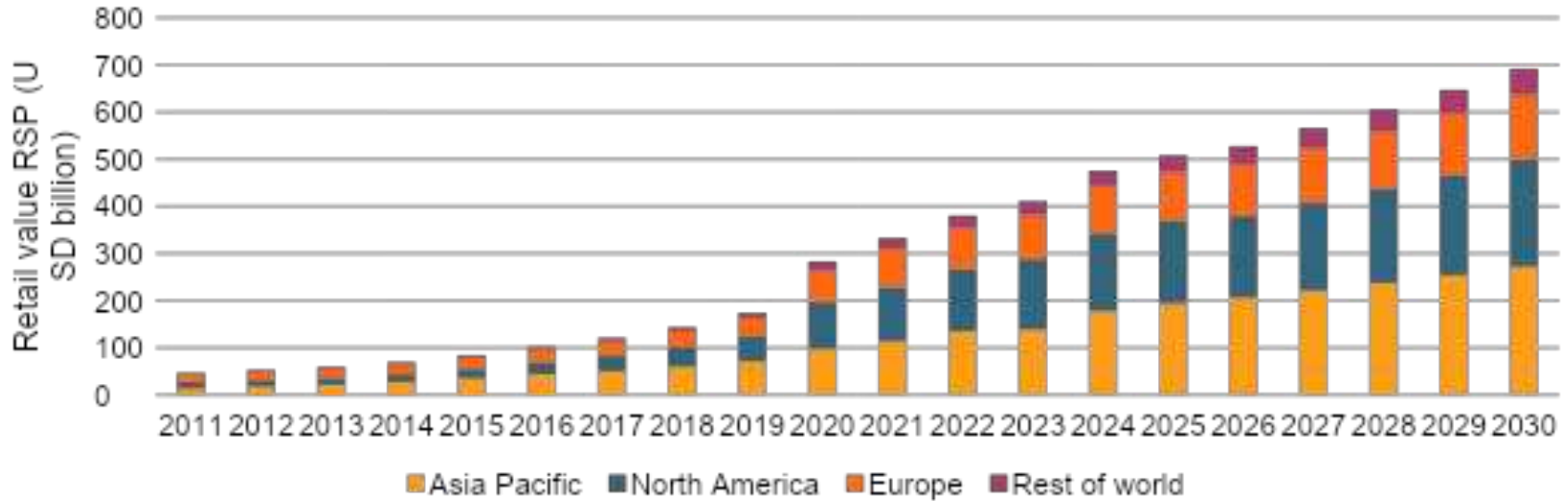


Source: EMI Consumer Foodservice research



Nor online grocery delivery and pick-up

Retail value sales of foods in retail e-commerce by region
2011-2030



Source: EMI Retail research. Real, inflation-adjusted terms

The consumer prioritizes value, health, and convenience-but cannot have them all at once

Conclusions

CONCLUSIONS

The global food industry looks to grow across all major geographies and segments in the coming years, though numerous challenges lay ahead

Volume growth is becoming a greater challenge, particularly in developed markets, where value growth is responsible now for most of industry growth

Affordability is the dominant consumer concern right now. That means they are prioritizing value in their shopping, which is not the same thing as them reaching for the least expensive option

The two areas where consumers are most likely to spend a little more are wellness and convenience, though the affordability question weighs on both of these

Thank you!

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