The Grocer

# MASTERCLASS

DELI

THE COMPLEAT FOOD GROUP




# Why shoppers are embracing the £10bn deli category

The way UK consumers eat at home has fundamentally shifted. The long-held 'three set meals a day' routine is giving way to more flexible, informal eating habits, and small plates now represent nearly 2bn occasions each year[1]. These flavour-led, curated occasions are reshaping how the nation eats and puts the Mediterranean Deli sub-category firmly in the spotlight.

The total deli category has grown to over £10bn[2], increasing in both value and volume, driven by shoppers building meals using items like cured meats, cheese, ready-to-eat savoury pastry, olives and antipasti.

## Thriving Mediterranean Deli

Within deli, continental meats is a key segment, worth £850m[3]. However, the £446m Mediterranean Deli subcategory is outperforming the wider market, growing +7.2% in value and +4.8% in volume[4]. Its growing appeal is reflected in the fact that nearly half of UK households buy into this category, at +4 percentage points in the past 52 weeks[5].

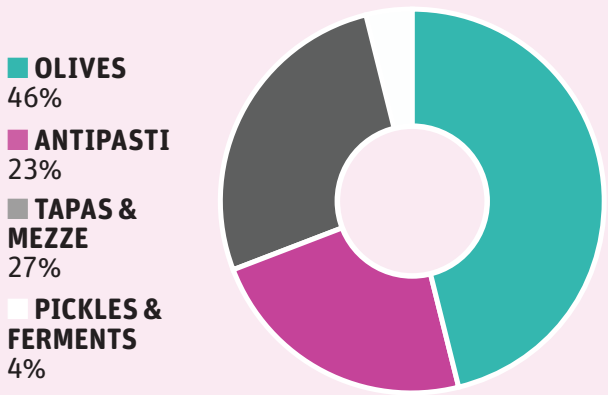
Chilled pickles and ferments are experiencing a seismic shift too, with the market increasing +24.4% in value and +25.4% in volume over the past 12 weeks alone, while tapas & mezze has grown +17.2% across both[6]. The key reasons behind this success are clear – consumers are seeking more flavour, more variety, and more elevated experiences from everyday home eating – and small plate occasions are hitting the mark.

## Why Compleat?

For over 30 years, The Compleat Food Group has helped bring the flavours of the Mediterranean to the UK, introducing into grocery retail a host of category-defining products, from chorizo and chilled olives to Spanish tortilla. Today, the group is home to two of the market's most influential brands, unearthed and Vadasz, both central to the Mediterranean Deli category's modern identity and growth.

Mediterranean Deli is no longer just an occasional treat. For retailers, it represents a powerful opportunity to grow a trending category that shows no signs of slowing, and Compleat's brands are well placed to support them.

### Breakdown of the total Mediterranean Deli category




*Source: NIQ, 52 w/e 24.01.26*

Source: [1] TCFG consumer U&A research April 2025; [2-6] NIQ, 52 w/e 24.01.26. Definition for Total Deli: total Mediterranean Deli, ready-to-eat savoury pastry, total cheese, total cooked meats (including Conti); [7-8] NIQ ,52 w/e 24.01.26

unearthed

The UK's No. 1 Mediterranean Deli brand[7]

Vadasz

The UK's No.1 chilled pickles & ferments brand[8]

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## DELI




What makes consumers choose deli?

# Understanding the Mediterranean Deli shopper

The Mediterranean Deli shopper is adventurous. They're swapping traditional meat and veg for delicacies like Jamon Serrano Gran Reserva, Spinach Tortilla and premium olives, once reserved for weekend entertaining or summer picnics. Now a firm all-year-round favourite, these dishes are driving sales. Understanding what's motivating this shift is essential for retailers looking to unlock growth.

### Snackification

Rather than following fixed mealtimes, many consumers are grazing, building small plates filled with variety depending on mood – known as 'snackification'[9]. They want items they can enjoy, reseal and return to later, as well as components that can flex easily into lunches or quick evening meals. This makes Mediterranean Deli uniquely positioned.







### Health and functional benefits

Fifty-three per cent of consumers now say they're focused on eating a balanced diet[10], up significantly since 2019. The Mediterranean diet's strong reputation for supporting heart health and overall wellbeing makes Mediterranean Deli a natural fit, offering shoppers an easy way to eat more healthily simply by choosing delicious food they enjoy. This sense of effortless, feel-good eating is a key part of its rising appeal. Interest in functional health is also accelerating, particularly gut health. This has helped the chilled pickles and ferments category reach £19m, growing +24.4% in value[11]. Vadasz, with 89% share of the market[12], is leading this growth, as its fresh super condiments deliver exceptional taste and gut-health benefits.

### Mindful eating

With shifting attitudes towards healthier lifestyles, many consumers are now seeking high-flavour, high-quality foods that feel satisfying in smaller portions. This aligns naturally with the Mediterranean diet, where simple, vibrant ingredients deliver enjoyment as well as nourishment. While weight management trends, including GLP 1 use, play a part in this, the broader shift is towards lighter, more considered eating that still feels indulgent. Mediterranean Deli products fit this perfectly, offering delicious, nutrient-rich components that help shoppers enjoy food more mindfully without compromise.




### Quality and premium expectation

When buying for small plate occasions, the most important driver for shoppers is quality, followed by value for money and price[13]. In this trade-up category, retailers need to stock products that meet shopper expectations. Brands such as unearthed and Vadasz, backed by multiple Great Taste awards, help reassure shoppers that their premium spend is worthwhile.

Source: [9]The Food People, Food Trends 26/27; [10] IGD, February 2026; [11] NIQ. 12 w/e 24.01.26; [12] NIQ, 52 w/e 24.01.26; [13] CFG consumer U&A research, April 2025

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Changing market, changing behaviours

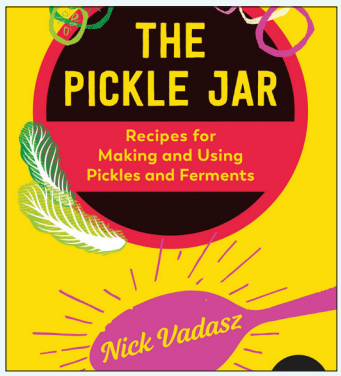
# Shaping the future: The Mediterranean Way

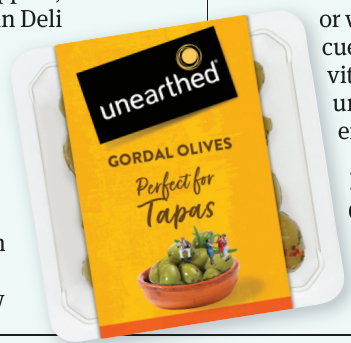
UK households are changing, from the rise of single-person living to the growth of multi-generational homes[14], and this movement is transforming how people shop, cook and snack. It is driving demand for smaller portions and more nuanced meal preferences, creating an environment in which Mediterranean Deli already thrives. This shift is unlocking even further growth.

To help retailers capture this momentum, The Compleat Food Group's brands are focused on educating, inspiring and innovating to bring even more shoppers into the category.

### Education

For some shoppers, Mediterranean Deli can still feel unfamiliar. Brands like unearthed are helping break down barriers to entry through simple tools such as a new olive taste guide, added to pack labels to help demystify olives and support shoppers to choose the variety that suits their palate. Its new olive range goes further by highlighting on front-of-pack the occasion for which each is perfect, such as with drinks, with friends or with tapas. Clear cues like these play a vital role in building understanding and encouraging trial.




### Inspiration and discovery

In a category still new to many, inspiration drives penetration. Vadasz is leading the way by championing the craft behind its products, from founder Nick Vadasz's book, The Pickle Jar, to hands-on kimchi masterclasses that teach consumers about fermentation and gut health.

### Health-focused products

Health will continue to shape future growth in deli, and shoppers are increasingly looking for products that deliver bold flavour while also feeling better for them. A good example is Vadasz Smacked Cucumbers, a fresh, spicy twist on traditional pickles. Cold brined and crunchy, they offer health conscious consumers a fresher alternative to sweeter, more processed ambient pickles and are an ideal accompaniment to any deli plate.




Meanwhile, unearthed olive pouches help support easy, healthier snacking, while the brand is moving to make more of its continental meats range nitrate- and nitrite-free.

### Pack size variation

Pack size variation is increasingly important as household structures, meal occasions and eating habits evolve. Unearthed already reflects this with its tortillas available in three sizes, while Vadasz is meeting demand for smaller, convenient options with the recently launched 275g pots of its best-selling Kimchi and Super Beet Kimchi.

A range of sizes also supports consumer trial, from smaller packs that encourage first-time discovery to larger formats for sharing.

Source: [14] IGD November 2025

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Insight for retailers

## Driving growth in Mediterranean Deli

The Compleat Food Group, together with its leading brands, unearthed and Vadasz, is well-placed to support retailers as they navigate fast-changing shopper needs and rising demand for Mediterranean Deli. Here are five actions to help them unlock growth:

### 1. Merchandise for simplicity

Shoppers buy occasions, not just products. Merchandising by meal moment and grouping continental meats, antipasti, olives and dips, makes the fixture easier to shop and inspires instant meal building. Retailers that merchandise by occasion see larger baskets as shoppers pick up complementary items they may not have considered, encouraging tapas nights to Big Night In spreads.

### 2. Keep promotions fresh

With multibuys driving a significant portion of category value, tying Mediterranean Deli into cross-category promotions, such as with desserts or drinks, keeps the offer exciting and builds basket size. Unearthed's recent in-store activities with complementary brands, such as Estrella Damm and San Pellegrino, delivered increases in value and volume, while also attracting younger shoppers to the category, showing the power of this type of activity.

**Most chosen cuisines for small plate occasions**

| | % |
|---|---|
| Mediterranean | 51 |
| British | 44 |
| Chinese | 36 |
| Indian | 30 |

Source: CFG consumer U&A research, April 2025




### 3. Brand and own label power

Brands and own label can also complement each other, so use them to their advantage. Recognisable, trusted brands with clear, consistent branding draw shoppers to the fixture, while own label helps broaden choice and encourages further purchase. Pairing the two in promotions has been proven to boost category performance and bring in new shoppers.

### 4. An all-year-round occasion

Mediterranean Deli performs well beyond the summer months. In fact, recent data shows the category growing fast in the cooler seasons, with tapas & mezze up +17.2% and pickles & ferments up +24.4% in value[15] – both outperforming their 52 week figures. With shoppers seeking flavour-first, elevated eating experiences, keeping Mediterranean Deli visible through autumn and winter – and linking it to occasions such as Big Night In – drives incremental sales. Small plates can be just as comforting and versatile as traditional winter meals, making them a year-round opportunity.

### 5. The Mediterranean Way

Small plates are not a fad, they reflect a notable shift in eating behaviour. Mediterranean flavours are the No.1 choice for these occasions (see table). Positioning Mediterranean Deli as an everyday eating solution, not just a treat, helps unlock more missions, more frequency and higher value. As shoppers embrace 'The Mediterranean Way', brands like unearthed and Vadasz will continue to drive category growth.

**To discover how Compleat and its brands can support innovation and growth in your deli category, go to: www.compleatfood.com/ranges/deli/**

Source: [15] NIQ 12 w/e 24.01.26