



Euromonitor  
International

# Fresh Food in Australia

January 2024

Table of Contents

## Fresh Food in Australia

### EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

### MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2018-2023

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

Table 3 - Retail Sales of Fresh Food by Category: Volume 2018-2023

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023

Table 5 - Retail Sales of Fresh Food by Category: Value 2018-2023

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2018-2023

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2018-2023

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2023-2028

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Eggs in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales in eggs return to good volume growth, while supply chain issues continue to create some challenges

Cost-of-living crisis exerts downward pressure on consumer spending

#### PROSPECTS AND OPPORTUNITIES

Industry growing increasingly focused on sustainable and ethical practices across the value chain

Growing focus on transparency and traceability

Summary 2 - Major Processors of Eggs 2023

### CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2018-2023

Table 16 - Total Sales of Eggs: % Total Volume Growth 2018-2023

Table 17 - Retail Sales of Eggs: Volume 2018-2023

Table 18 - Retail Sales of Eggs: % Volume Growth 2018-2023

Table 19 - Retail Sales of Eggs: Value 2018-2023

Table 20 - Retail Sales of Eggs: % Value Growth 2018-2023

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023

Table 22 - Forecast Total Sales of Eggs: Total Volume 2023-2028

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028

Table 24 - Forecast Retail Sales of Eggs: Volume 2023-2028

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

## Fish and Seafood in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fish and seafood consumption challenged by cost-of-living crisis

Growing scrutiny on labelling and sustainability practices in seafood

#### PROSPECTS AND OPPORTUNITIES

Uncertain export outlook for industry to impact domestic market

Evolving competitive landscape of fish and seafood industry to drive innovation

Summary 3 - Major Processors of Fish and Seafood 2023

#### CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

## Fruits in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflationary pressure and supply disruptions continue to create challenges

Foodservice volumes will be slow to return to pre-pandemic level of sales

#### PROSPECTS AND OPPORTUNITIES

Health and wellness trends to drive overall demand for fruits

Could buy-outs help boost Australia's export potential?

Summary 4 - Major Processors of Fruits 2023

#### CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023

Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023

Table 45 - Retail Sales of Fruits by Category: Value 2018-2023

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2023-2028

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2023-2028

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

## Meat in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation causes increasing pain for the Australian meat industry, as consumer spending decreases  
Slow recovery of foodservice sales continues to create challenges

#### PROSPECTS AND OPPORTUNITIES

Sustainability continues to grow in importance for the meat industry  
Increasing competition from plant-based alternatives  
Summary 5 - Major Processors of Meat 2023

#### CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2018-2023

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2018-2023

Table 56 - Retail Sales of Meat by Category: Volume 2018-2023

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2018-2023

Table 58 - Retail Sales of Meat by Category: Value 2018-2023

Table 59 - Retail Sales of Meat by Category: % Value Growth 2018-2023

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023

Table 61 - Forecast Sales of Meat by Category: Total Volume 2023-2028

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2023-2028

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028

Table 65 - Forecast Retail Sales of Meat by Category: Value 2023-2028

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

## Nuts in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation and challenging economic environment lead to unit price spikes  
Supply chain issues and problems with harvests drive price rises

#### PROSPECTS AND OPPORTUNITIES

Rise in on-the-go consumption to keep retail demand strong  
Fresh nuts to see competition from processed nuts, with the latter benefitting from convenience  
Summary 6 - Major Processors of Nuts 2023

#### CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2018-2023

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2018-2023

Table 69 - Retail Sales of Nuts by Category: Volume 2018-2023

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2018-2023

Table 71 - Retail Sales of Nuts by Category: Value 2018-2023

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2018-2023

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2023-2028

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2023-2028

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2023-2028

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

## Pulses in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Supply chain issues and adverse weather conditions lead to price hikes

Health the wellness trends continue to drive the growth of pulses

#### PROSPECTS AND OPPORTUNITIES

Packaged and processed pulses likely to drive the industry

Pulses expected to continue to see robust growth due to convenience and affordability

Summary 7 - Major Processors of Pulses 2023

### CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2018-2023

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2018-2023

Table 82 - Retail Sales of Pulses by Category: Volume 2018-2023

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2018-2023

Table 84 - Retail Sales of Pulses by Category: Value 2018-2023

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2018-2023

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2023-2028

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2023-2028

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2023-2028

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

## Starchy Roots in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Supply chain issues and adverse weather conditions impact supply

Foodservice recovery remains dampened due to cost-of-living crisis

#### PROSPECTS AND OPPORTUNITIES

Growing health consciousness to impact category

Inflationary pressures to continue to impact the category, with consumers trading down

Summary 8 - Major Processors of Starchy Roots 2023

### CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2018-2023

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2018-2023

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023

Table 97 - Retail Sales of Starchy Roots by Category: Value 2018-2023

- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

## Sugar and Sweeteners in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price of sugar hits record highs in 2023, due to low availability and rising production costs  
 Rising health consciousness to further slow growth in sugar and sweeteners both

#### PROSPECTS AND OPPORTUNITIES

“Snackification” and permissible indulgence to remain important factors  
 Supply of sugar threatened by volatile weather patterns and global tensions  
 Summary 9 - Major Processors of Sugar and Sweeteners 2023

#### CATEGORY DATA

- Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
- Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
- Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2018-2023
- Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
- Table 110 - Retail Sales of Sugar and Sweeteners: Value 2018-2023
- Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
- Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
- Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
- Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
- Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
- Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
- Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
- Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

## Vegetables in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Adverse growing conditions and inflationary pressures impact category  
 Increased competition from processed vegetables, as consumers seek convenience and cost savings

#### PROSPECTS AND OPPORTUNITIES

Interest in produce-origin offers growth opportunities for local producers  
 Health and wellness trends to drive growth for vegetables  
 Summary 10 - Major Processors of Vegetables 2023

#### CATEGORY DATA

- Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023
- Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023
- Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2018-2023

Table 123 - Retail Sales of Vegetables by Category: Value 2018-2023

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2018-2023

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2023-2028

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2023-2028

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2023-2028

## 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-australia/report](http://www.euromonitor.com/fresh-food-in-australia/report).