



# Fresh Food in Australia

December 2024

Table of Contents

EXECUTIVE SUMMARY

Fresh food in 2024: The big picture  
2024 key trends  
Retailing developments  
What next for fresh food?

MARKET DATA

- Table 1 - Total Sales of Fresh Food by Category: Total Volume 2019-2024
- Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2019-2024
- Table 3 - Retail Sales of Fresh Food by Category: Volume 2019-2024
- Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2019-2024
- Table 5 - Retail Sales of Fresh Food by Category: Value 2019-2024
- Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2019-2024
- Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2019-2024
- Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2019-2024
- Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2024-2029
- Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2024-2029
- Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2024-2029
- Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2024-2029
- Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2024-2029
- Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth of eggs remains steady but marginally impeded by outbreak of avian influenza  
Australian Eggs launches new training tool to reduce risk of biosecurity issues

PROSPECTS AND OPPORTUNITIES

Positive outlook for eggs in Australia as consumers diversify diets and seek other sources of protein  
Research and development in egg production to improve sustainability outcomes  
Summary 2 - Major Processors of Eggs 2024

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2019-2024
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2019-2024
- Table 17 - Retail Sales of Eggs: Volume 2019-2024
- Table 18 - Retail Sales of Eggs: % Volume Growth 2019-2024
- Table 19 - Retail Sales of Eggs: Value 2019-2024
- Table 20 - Retail Sales of Eggs: % Value Growth 2019-2024
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2019-2024
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2024-2029
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2024-2029
- Table 24 - Forecast Retail Sales of Eggs: Volume 2024-2029
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2024-2029

Table 26 - Forecast Retail Sales of Eggs: Value 2024-2029

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2024-2029

Fish and Seafood in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fish and seafood experiences persistent price inflation compared to fresh meat  
Consumer concerns over sustainability and origin of imported fish

PROSPECTS AND OPPORTUNITIES

Slow recovery of international markets provide greater opportunity for domestic seafood consumption  
Aldi expected to grow its seafood business as consumers look for the best value  
Summary 3 - Major Processors of Fish and Seafood 2024

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2019-2024
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2019-2024
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2019-2024
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2019-2024
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2019-2024
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2019-2024
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2019-2024
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2024-2029
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2024-2029
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2024-2029
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2024-2029
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2024-2029
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2024-2029

Fruits in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflationary impact on price of fruits results in reduced consumption  
Launch of new apple brand can help create excitement

PROSPECTS AND OPPORTUNITIES

Stronger volume growth as inflation eases and consumers seek healthier snacking options  
Supermarket demands impact livelihood of farmers in Australia  
Summary 4 - Major Processors of Fruits 2024

CATEGORY DATA

- Table 41 - Total Sales of Fruits by Category: Total Volume 2019-2024
- Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2019-2024
- Table 43 - Retail Sales of Fruits by Category: Volume 2019-2024
- Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2019-2024
- Table 45 - Retail Sales of Fruits by Category: Value 2019-2024
- Table 46 - Retail Sales of Fruits by Category: % Value Growth 2019-2024
- Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2019-2024
- Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2024-2029
- Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2024-2029

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2024-2029

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2024-2029

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2024-2029

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2024-2029

Meat in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

High inflation and cost of living cuts into consumer spend on meat

Innovations in meat manufacturing focus on delivering sustainability goals

PROSPECTS AND OPPORTUNITIES

Total consumption of meat expected to quickly recover as prices stabilise

Recovery of foodservice expected, but channel sees rising demand for plant-based meat alternatives

Summary 5 - Major Processors of Meat 2024

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2019-2024

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2019-2024

Table 56 - Retail Sales of Meat by Category: Volume 2019-2024

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2019-2024

Table 58 - Retail Sales of Meat by Category: Value 2019-2024

Table 59 - Retail Sales of Meat by Category: % Value Growth 2019-2024

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2019-2024

Table 61 - Forecast Sales of Meat by Category: Total Volume 2024-2029

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2024-2029

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2024-2029

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2024-2029

Table 65 - Forecast Retail Sales of Meat by Category: Value 2024-2029

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2024-2029

Nuts in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Marginal volume growth for nuts in Australia amidst moderate inflation

Increase in almond production raises concerns over water supply

PROSPECTS AND OPPORTUNITIES

Nuts set for steady growth but category needs marketing push to stand out against competition

Developments in farming techniques to help improve production efficiency

Summary 6 - Major Processors of Nuts 2024

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2019-2024

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2019-2024

Table 69 - Retail Sales of Nuts by Category: Volume 2019-2024

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2019-2024

Table 71 - Retail Sales of Nuts by Category: Value 2019-2024

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2019-2024

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2019-2024

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2024-2029

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2024-2029

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2024-2029

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2024-2029

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2024-2029

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2024-2029

Pulses in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumer preference for shelf stable and frozen pulses impacts performance of fresh produce

Improvement in farming conditions to help control prices

PROSPECTS AND OPPORTUNITIES

Growth potential for pulses as consumers seek out plant-based protein alternatives

Steady recovery of sales expected as price of pulses starts to ease

Summary 7 - Major Processors of Pulses 2024

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2019-2024

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2019-2024

Table 82 - Retail Sales of Pulses by Category: Volume 2019-2024

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2019-2024

Table 84 - Retail Sales of Pulses by Category: Value 2019-2024

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2019-2024

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2019-2024

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2024-2029

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2024-2029

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2024-2029

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2024-2029

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2024-2029

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2024-2029

Starchy Roots in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Potato consumption declines as Australians struggle to cope with rising cost of fresh food

Focus on aesthetically-pleasing potatoes increases amount of food waste

PROSPECTS AND OPPORTUNITIES

Positive outlook for potatoes as inflation eases and consumers resume typical spending

Innovation to help with improving yields and sustainability goals

Summary 8 - Major Processors of Starchy Roots 2024

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2019-2024

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2019-2024

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2019-2024

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2019-2024

Table 97 - Retail Sales of Starchy Roots by Category: Value 2019-2024

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2019-2024

Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2019-2024

Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2024-2029

Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2024-2029

Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2024-2029

Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2024-2029

Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2024-2029

Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2024-2029

Sugar and Sweeteners in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Unit price growth of sugar hinders volume sales in 2024
- Sugar alternatives key for growth as consumers make healthier dietary choices

PROSPECTS AND OPPORTUNITIES

- Steady performance expected for sugar and sweeteners as consumers still value flavour in their food
- Potential sugar tax could impact market landscape and increase prices again
- Summary 9 - Major Processors of Sugar and Sweeteners 2024

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2019-2024

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2019-2024

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2019-2024

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2019-2024

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2019-2024

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2019-2024

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2019-2024

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2024-2029

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2024-2029

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2024-2029

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2024-2029

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2024-2029

Vegetables in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Australians are eating fewer fresh vegetables amidst high cost of living
- “Imperfect” vegetables gain attention as concerns over food waste increase

PROSPECTS AND OPPORTUNITIES

- Positioning vegetables as a snack choice can boost consumption
- Technological innovations to help keep Australian farmers competitive in local and global markets
- Summary 10 - Major Processors of Vegetables 2024

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2019-2024

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2019-2024

Table 121 - Retail Sales of Vegetables by Category: Volume 2019-2024

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2019-2024

Table 123 - Retail Sales of Vegetables by Category: Value 2019-2024

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2019-2024

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2019-2024

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2024-2029

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2024-2029

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2024-2029

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2024-2029

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2024-2029

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2024-2029

## 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).