



# Staple Foods in Australia

December 2023

Table of Contents

## Staple Foods in Australia

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for staple foods?

### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baked Goods in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Navigating unit price rises and surging domestic demand

A competitive landscape in baked goods

Sweet treats within more limited budgets

#### PROSPECTS AND OPPORTUNITIES

Return to convenience channels expected

Flavourful fusions: Cross-category collaborations and nostalgia

Understanding consumer preferences and addressing rising health awareness

### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023

Table 14 - Sales of Baked Goods by Category: Value 2018-2023

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 - Sales of Pastries by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 19 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

## Breakfast Cereals in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Robust growth for breakfast cereals  
New product developments focus on health-conscious consumers  
Cost challenges and need for capital investment

#### PROSPECTS AND OPPORTUNITIES

The rising trend of brand partnerships in breakfast cereals  
Consumption of cereals beyond the breakfast table  
Despite challenges, an aim to move to sustainable packaging in breakfast cereals

#### CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023  
Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023  
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023  
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023  
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023  
Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023  
Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023  
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028  
Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028  
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028  
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

## Processed Fruit and Vegetables in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

More home cooking drives growth in processed fruit and vegetables  
Imported ingredients vs. profit margins: A dilemma for processed produce manufacturers  
Challenges are faced by the cold chain

#### PROSPECTS AND OPPORTUNITIES

A focus on optimising operational efficiency  
Premiumisation as consumers look for convenience and health benefits  
Sustainability in focus: A green evolution in processed fruit and vegetables

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023  
Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023  
Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023  
Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023  
Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023  
Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023  
Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023  
Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023  
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028  
Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

## Processed Meat, Seafood and Alternatives To Meat in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price rises ease in 2023  
The dynamics of the competition in processed meat  
The impact of the clean label trend in processed meat

#### PROSPECTS AND OPPORTUNITIES

The influence of the Biosecurity Protection Levy on processed meat  
Sustainability claims on the rise in processed seafood  
The future of plant-based foods: Consolidation, innovation, and consumer appeal

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023  
Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023  
Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023  
Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023  
Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023  
Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023  
Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023  
Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023  
Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023  
Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028  
Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Rice, Pasta and Noodles in Australia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Demand driven by more cooking at home and higher immigration flows  
Health-driven trends in rice, pasta and noodles  
Loyalty over discounts: Branded manufacturers make a stand against private label

#### PROSPECTS AND OPPORTUNITIES

Demand for convenience drives premiumisation  
Catering to all tastes: The rising trend of personalised and cultural cuisine  
Shift towards sustainable food packaging

#### CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023  
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023  
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023  
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023  
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023  
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023  
Table 69 - NBO Company Shares of Rice: % Value 2019-2023  
Table 70 - LBN Brand Shares of Rice: % Value 2020-2023  
Table 71 - NBO Company Shares of Pasta: % Value 2019-2023  
Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023  
Table 73 - NBO Company Shares of Noodles: % Value 2019-2023  
Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023  
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023  
Table 76 - Distribution of Rice by Format: % Value 2018-2023  
Table 77 - Distribution of Pasta by Format: % Value 2018-2023  
Table 78 - Distribution of Noodles by Format: % Value 2018-2023  
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028  
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028  
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028  
Table 82 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-australia/report](http://www.euromonitor.com/staple-foods-in-australia/report).