

Baked Goods in Australia

November 2025

Table of Contents

Baked Goods in Australia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Private label benefits from consumer price-sensitivity

INDUSTRY PERFORMANCE

Price driving growth amidst strong demand for baked goods

Cakes taps into enduring demand for indulgence

WHAT'S NEXT?

Consistent demand for baked goods with category maturity being very high

Functional claims becoming a category standard as consumers demand better-for-you options

Artisanal baked goods manufacturers to face more pressure from packaged brands

COMPETITIVE LANDSCAPE

Goodman Fielder retains lead despite share drop

Private label brands leveraging price advantage as consumers seek value

CHANNELS

Minimal development in channels of distribution

E-commerce growth

CATEGORY DATA

Table 1 - Sales of Baked Goods by Category: Volume 2020-2025

Table 2 - Sales of Baked Goods by Category: Value 2020-2025

Table 3 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 5 - Sales of Pastries by Type: % Value 2020-2025

Table 6 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 7 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 8 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 11 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Staple Foods in Australia - Industry Overview

EXECUTIVE SUMMARY

Private label benefits from rising price-sensitivity

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic conditions continue to weigh on consumers' minds

Changing consumption habits

WHAT'S NEXT?

Essential status to provide resilience

Changing lifestyles and behaviours

Targeting budget conscious consumers

COMPETITIVE LANDSCAPE

Retailers lead the market Private label dynamism

CHANNELS

Supermarkets is the dominant channel Supermarkets is the dominant channel

MARKET DATA

- Table 13 Sales of Staple Foods by Category: Volume 2020-2025
- Table 14 Sales of Staple Foods by Category: Value 2020-2025
- Table 15 Sales of Staple Foods by Category: % Volume Growth 2020-2025
- Table 16 Sales of Staple Foods by Category: % Value Growth 2020-2025
- Table 17 NBO Company Shares of Staple Foods: % Value 2021-2025
- Table 18 LBN Brand Shares of Staple Foods: % Value 2022-2025
- Table 19 Penetration of Private Label by Category: % Value 2020-2025
- Table 20 Distribution of Staple Foods by Format: % Value 2020-2025
- Table 21 Forecast Sales of Staple Foods by Category: Volume 2025-2030
- Table 22 Forecast Sales of Staple Foods by Category: Value 2025-2030
- Table 23 Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
- Table 24 Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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 focusing 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/baked-goods-in-australia/report.