

# Staple Foods in Austria

November 2024

**Table of Contents** 

#### Staple Foods in Austria

#### **EXECUTIVE SUMMARY**

Staple foods in 2024: The big picture

Key trends in 2024 Competitive Landscape

Channel developments

What next for staple foods?

#### MARKET DATA

- Table 1 Sales of Staple Foods by Category: Volume 2019-2024
- Table 2 Sales of Staple Foods by Category: Value 2019-2024
- Table 3 Sales of Staple Foods by Category: % Volume Growth 2019-2024
- Table 4 Sales of Staple Foods by Category: % Value Growth 2019-2024
- Table 5 NBO Company Shares of Staple Foods: % Value 2020-2024
- Table 6 LBN Brand Shares of Staple Foods: % Value 2021-2024
- Table 7 Penetration of Private Label by Category: % Value 2019-2024
- Table 8 Distribution of Staple Foods by Format: % Value 2019-2024
- Table 9 Forecast Sales of Staple Foods by Category: Volume 2024-2029
- Table 10 Forecast Sales of Staple Foods by Category: Value 2024-2029
- Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2024-2029
- Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2024-2029

#### DISCLAIMER

#### **SOURCES**

Summary 1 - Research Sources

# Baked Goods in Austria

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Stable growth for baked goods in 2024

Ankerbrot and Rudolf Ölz Meisterbäcker lead fragmented landscape, following artisanal Pastries leads value and volume growth

#### PROSPECTS AND OPPORTUNITIES

Demand set to remain strong

Unpackaged bread will continue to do well, with health trends shaping overall progress Supermarkets and sustainability as key growth drivers

#### **CATEGORY DATA**

- Table 13 Sales of Baked Goods by Category: Volume 2019-2024
- Table 14 Sales of Baked Goods by Category: Value 2019-2024
- Table 15 Sales of Baked Goods by Category: % Volume Growth 2019-2024
- Table 16 Sales of Baked Goods by Category: % Value Growth 2019-2024
- Table 17 Sales of Pastries by Type: % Value 2019-2024
- Table 18 NBO Company Shares of Baked Goods: % Value 2020-2024
- Table 19 LBN Brand Shares of Baked Goods: % Value 2021-2024
- Table 20 Distribution of Baked Goods by Format: % Value 2019-2024
- Table 21 Forecast Sales of Baked Goods by Category: Volume 2024-2029
- Table 22 Forecast Sales of Baked Goods by Category: Value 2024-2029
- Table 23 Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029

#### Breakfast Cereals in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Breakfast cereals abidingly popular in Austria

Nestlé retains overall leadership

New product launches align with prevailing health and wellness trends

#### PROSPECTS AND OPPORTUNITIES

Further growth assured for forecast period with continued shift away from added sugar

Family breakfast cereals to remain popular

Convenience and health trends set to accelerate

#### **CATEGORY DATA**

Table 25 - Sales of Breakfast Cereals by Category: Volume 2019-2024

Table 26 - Sales of Breakfast Cereals by Category: Value 2019-2024

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2019-2024

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2019-2024

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2020-2024

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2021-2024

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2019-2024

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2024-2029

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2024-2029

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2024-2029

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2024-2029

## Processed Fruit and Vegetables in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Positive volume sales in 2024

Iglo leads category by wide margin

Frozen options account for largest slice of sales, with convenience and health trends propelling growth

# PROSPECTS AND OPPORTUNITIES

Demand for convenience means strong growth forecast

Sustainability and regionality to remain key category trends

Frozen potatoes will continue to rise, while diversification expands throughout overall category

# CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2019-2024

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

#### Processed Meat, Seafood and Alternatives To Meat in Austria.

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Solid growth seen for overall category in 2024

Hofer still in the lead, with Rewe and Spar investing more in substitutes

Processed meat popular choice among Austrians, though substitutes are rising

#### PROSPECTS AND OPPORTUNITIES

Processed meat, seafood and substitutes set to expand over forecast period

Environmental and animal welfare concerns will have growing impact, prompting innovation in meat and seafood substitutes Consumers will become more focused on product quality

#### **CATEGORY DATA**

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2024

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2019-2024

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2024-2029

# Rice, Pasta and Noodles in Austria

### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Rice, pasta and noodles benefits from staple status in Austria

Rewe International leads companies in 2024, followed by Mars

Pasta remains most popular product

#### PROSPECTS AND OPPORTUNITIES

Enduring popularity ensures continued category expansion

Convenience and high-protein trends set to gain ground

Sustainability and health and wellness will remain key concerns

#### **CATEGORY DATA**

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2019-2024

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024

- Table 68 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024
- Table 69 NBO Company Shares of Rice: % Value 2020-2024
- Table 70 LBN Brand Shares of Rice: % Value 2021-2024
- Table 71 NBO Company Shares of Pasta: % Value 2020-2024
- Table 72 LBN Brand Shares of Pasta: % Value 2021-2024
- Table 73 NBO Company Shares of Noodles: % Value 2020-2024
- Table 74 LBN Brand Shares of Noodles: % Value 2021-2024
- Table 75 Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024
- Table 76 Distribution of Rice by Format: % Value 2019-2024
- Table 77 Distribution of Pasta by Format: % Value 2019-2024
- Table 78 Distribution of Noodles by Format: % Value 2019-2024
- Table 79 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029
- Table 80 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2024-2029
- Table 81 Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029
- Table 82 Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-austria/report.