



# World Market for Staple Foods

December 2023

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## INTRODUCTION

### Scope

Examining five trends shaping staple foods

## STATE OF THE INDUSTRY

Inflationary pressures lead to strong increase in staple foods retail value sales

Staple foods records the sharpest market size increase in the foods industry

Rice, pasta and noodles is the fastest growing category across many markets

Emerging economies drive future growth as demand in key developed markets is slower

Largest staple foods categories show weak growth in their major markets

The US remains, by far, the largest staple foods market

Macroeconomic factors, demographics and shifting lifestyle trends boost future sales

Consumers are increasingly buying through cheaper and more convenient channels

## LEADING COMPANIES AND BRANDS

Leading players face severe competition from emerging brands and private label

Top companies are restructuring their businesses to improve efficiency

Grupo Bimbo invests in premiumisation to tackle price-driven competition

Fastest growing companies operate in emerging economies

## TOP FIVE TRENDS SHAPING THE INDUSTRY

Examining five trends shaping staple foods

Geopolitical tension and trade-related policies pose further inflation risks

Staple foods manufacturers adjust offerings as cost-of-living crisis persists

Case Study: Adriana launches less time and energy pasta in the Czech Republic

Growth of processed meat, seafood and alternatives to meat stagnates

Case Study: Biff's redesigns jackfruit range for lower prices in the UK

Regulations push for healthier nutrition but demand for indulgence persists

Case Study: ZE-TIAN promotes low-sugar dorayaki in SUPERMONKEY gyms in China

Recovery of out-of-home mobility drives demand for convenient packages

Case Study: Nissin Cup Noodles elevates instant foods experiences in the US

Sustainability concerns provide new business model opportunities in staple foods

Case Study: Lidl and Too Good To Go collaborate to reduce baked goods waste in Denmark

## MARKET SNAPSHOTS

Global snapshot of Baked Goods

Global snapshot of Breakfast Cereals

Global snapshot of Processed Fruit and Vegetables

Global snapshot of Processed Meat, Seafood and Alternatives to Meat

Global snapshot of Rice, Pasta and Noodles

Regional snapshot: Asia Pacific

Regional snapshot: North America

Regional snapshot: Latin America

Regional snapshot: Western Europe

Regional snapshot: Middle East and Africa

Regional snapshot: Eastern Europe

Regional snapshot: Australasia

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