



HW Staple Foods in Australia

December 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional staples gain visibility as front-of-pack cues influence purchase decisions

INDUSTRY PERFORMANCE

Functional benefits and front-of-pack signalling shape staple foods innovation
High fibre evolves into a gut health narrative rather than a standalone claim
High protein expands across everyday staples, but value sensitivity shapes how it is used

WHAT'S NEXT

Weight management, no added sugar cues and clearer labelling shape future staple foods demand
High fibre is expected to grow modestly, with differentiation depending on functional storytelling
High protein will remain important, but claim usage will depend on category fit and consumer expectations

CATEGORY DATA

- Table 1 - Sales of Staple Foods by Health and Wellness Type: Value 2020-2024
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Health and Wellness in Australia - Industry Overview

EXECUTIVE SUMMARY

Health and wellness in Australia pivots towards sugar reduction, functionality and credible everyday benefits

INDUSTRY PERFORMANCE

Sugar reduction and metabolic health concerns shape category-wide performance
Functionality, gut health and protein move health and wellness beyond avoidance

WHAT'S NEXT?

Mainstream integration of functional, lower-sugar and clean-label products will drive future growth

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