



# HW Staple Foods in Australia

December 2025

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## HW Staple Foods in Australia - Category analysis

### 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

Table 2 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2020-2024

Table 3 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2020-2024

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Table 8 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2024-2029

Table 9 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2024-2029

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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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