



Euromonitor  
International

# Staple Foods in Western Europe

April 2025

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## REGIONAL OVERVIEW

Western Europe expected to lose top spot as the biggest regional market for staple foods

Modest annual growth rates expected over the forecast period

Western Europe has the biggest baked goods market among the global regions

Rice, pasta and noodles in Turkey records the most dynamic growth in 2019-2024

Germany now the region's biggest meat and seafood substitutes market

Baked goods dominate the new retail value sales added over 2019-2024

Inflation still having an effect on volume sales in Italian staple foods in 2024

In spite of the HFSS regulations, convenience remains important for UK consumers

Modern grocery retailers dominate sales of staple foods in Western Europe

Food/drink/tobacco specialists remain a key channel in baked goods sales

## LEADING COMPANIES AND BRANDS

Artisanal products contribute to fragmented competitive landscapes

McCain acquires plant-based frozen food brand Strong Roots

Germany and the UK account for almost half of regional private label sales between them

Barilla Holding brands move up the rankings over 2019-2024

## FORECAST PROJECTIONS

Modest annual growth rates expected over the forecast period in Western Europe

Chilled pasta will continue outperforming its dried counterpart in Italy

Further HFSS regulations to be introduced in the UK from October 2025

## COUNTRY SNAPSHOTS

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Austria: Competitive and Retail Landscape

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