



Rice, Pasta and Noodles in the Czech Republic

November 2025

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2025 DEVELOPMENTS

Price increases and premiumisation drive the performance of rice, pasta and noodles

INDUSTRY PERFORMANCE

Modest value growth is driven by prices rises and premiumisation

Noodles, particularly instant varieties, drive growth as consumers seek convenience

WHAT'S NEXT?

Convenience and Asian-style cuisine is set to drive future growth in rice, pasta, and noodles

Rising focus on nutrition is expected to drive growth in wholegrain and high-protein options

Sustainability and eco-conscious packaging is set to shape product innovation

COMPETITIVE LANDSCAPE

Orkla Foods maintains its leadership through strong brand names and solid distribution

Nongshim drives growth through rapid expansion in instant noodles and strong flavour innovation

CHANNELS

Hypermarkets lead in rice, pasta and noodles despite gradual share erosion to smaller formats

Discounters gain momentum as some consumers favour convenience and value over large-scale hypermarket shopping

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Staple Foods in the Czech Republic - Industry Overview

EXECUTIVE SUMMARY

Premiumisation, innovation and health trends shape growth in staple foods

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value growth is driven by higher prices and an ongoing reliance on promotions
Rising health awareness drives demand for cleaner and higher-protein staple foods
Sustainability and convenience trends reshape staple food production and consumption

WHAT'S NEXT?

Premiumisation and innovation are set to drive steady value growth in staple foods
Convenient, healthier and free-from options are set to influence product innovation
Retail e-commerce is set to gain share as subscription models and bundled promotions increase

COMPETITIVE LANDSCAPE

Penam maintains its leadership in Czech staple foods despite a modest share decline
Lidl Ceska republika drives private label growth and reshapes competition in staple foods

CHANNELS

Hypermarkets remains the leading channel for staple foods despite a slight share decline
Discounters and retail e-commerce drive dynamic shifts in staple food distribution

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