



# Rice, Pasta and Noodles in Pakistan

November 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Urbanisation facilitates shift towards convenient, high-quality packaged offerings

### INDUSTRY PERFORMANCE

Rising urban lifestyles boost demand for packaged rice, pasta, and noodles

Rice shows particularly strong performance, thanks to its essential role in local cuisine

### WHAT'S NEXT?

Q-commerce to drive growth in rice, pasta, and noodles

Health-focused offerings will gain prominence in noodles and pasta

Regional flavours will drive differentiation and enhance customer engagement

### COMPETITIVE LANDSCAPE

Engro continues to dominate sales

Matco deepens its reach

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Small local grocers is most important channel

E-commerce expands but reach remains limited outside urban centres

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## Staple Foods in Pakistan - Industry Overview

### EXECUTIVE SUMMARY

Expansion of modern retail fuels staple food sales

### KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Convenience and urbanisation drive robust growth

Consumers shift from unpackaged to packaged formats mid rising focus on food safety and quality

Affordability remains key as local production expands

## WHAT'S NEXT?

Changing lifestyles and retail formalisation will drive growth

Competition will intensify as players expand their portfolios and invest in geographical expansion

Health and wellness trend will gain traction in urban areas

## COMPETITIVE LANDSCAPE

Engro leads fragmented landscape

Matco gains share at expense of smaller competitors

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