



Rice, Pasta and Noodles in the Philippines

December 2025

Table of Contents

Rice, Pasta and Noodles in the Philippines - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Policy shifts and brand activations shape a resilient staples category

INDUSTRY PERFORMANCE

Rice retains essential role in Filipino diets in 2025

Rice remains major growth driver

WHAT'S NEXT?

Sales of rice, pasta and noodles set for steady growth

Wellness trends shape innovation in instant noodles

Sustainability initiatives gain strategic importance

COMPETITIVE LANDSCAPE

Monde Nissin Corp builds on instant noodles leadership

Nongshim expands within instant noodles

CHANNELS

Supermarkets remains the leading distribution channel in 2025

E-commerce benefits from convenience demand and increased engagement

CATEGORY DATA

Table 1 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 2 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 3 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 4 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 5 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 6 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 7 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 8 - NBO Company Shares of Rice: % Value 2021-2025

Table 9 - LBN Brand Shares of Rice: % Value 2022-2025

Table 10 - NBO Company Shares of Pasta: % Value 2021-2025

Table 11 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 12 - NBO Company Shares of Noodles: % Value 2021-2025

Table 13 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 14 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 15 - Distribution of Rice by Format: % Value 2020-2025

Table 16 - Distribution of Pasta by Format: % Value 2020-2025

Table 17 - Distribution of Noodles by Format: % Value 2020-2025

Table 18 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 19 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 20 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 21 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Staple Foods in the Philippines - Industry Overview

EXECUTIVE SUMMARY

Essential demand holds firm as innovation and digital reach expand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Staple foods benefits from essential nature of categories
Digitalisation and collaborations shape development in 2025
Health and wellness trends remain highly impactful

WHAT'S NEXT?

Further growth forecast as government works to ease price pressure
Health concerns will continue to inform innovation
Players to increase investment in sustainability

COMPETITIVE LANDSCAPE

Purefoods-Hormel retains overall leadership through namesake brand
Nongshim expands thanks to success in instant noodles

CHANNELS

Supermarkets leads retail distribution, rising further in 2025
E-commerce posts fastest expansion, with social commerce boosting consumer engagement

MARKET DATA

Table 22 - Sales of Staple Foods by Category: Volume 2020-2025
Table 23 - Sales of Staple Foods by Category: Value 2020-2025
Table 24 - Sales of Staple Foods by Category: % Volume Growth 2020-2025
Table 25 - Sales of Staple Foods by Category: % Value Growth 2020-2025
Table 26 - NBO Company Shares of Staple Foods: % Value 2021-2025
Table 27 - LBN Brand Shares of Staple Foods: % Value 2022-2025
Table 28 - Penetration of Private Label by Category: % Value 2020-2025
Table 29 - Distribution of Staple Foods by Format: % Value 2020-2025
Table 30 - Forecast Sales of Staple Foods by Category: Volume 2025-2030
Table 31 - Forecast Sales of Staple Foods by Category: Value 2025-2030
Table 32 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
Table 33 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/rice-pasta-and-noodles-in-the-philippines/report.