



Rice, Pasta and Noodles in Poland

November 2025

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2025 DEVELOPMENTS

Everyday affordability and versatility underpin category momentum

INDUSTRY PERFORMANCE

Staple carbohydrates support steady value growth in a cost-conscious environment
Pasta outperforms thanks to convenience, variety and changing meal habits

WHAT'S NEXT?

Steady growth outlook supported by home cooking and experimentation
Better-for-you pasta and rice options expand as health awareness grows
Premiumisation and private label expansion reshape competitive dynamics

COMPETITIVE LANDSCAPE

Private label strength at Biedronka underpins Jeronimo Martins Polska's leadership
Henglein drives chilled pasta growth through convenience and strong retail presence

CHANNELS

Discounters remain the main shopping destination for rice, pasta and noodles
Neighbourhood grocers gain share as convenient top-up locations

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EXECUTIVE SUMMARY

Affordability, private label expansion and health awareness drive category growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Plant-based and sustainable diets gain momentum among younger consumers

Clean labels and natural positioning shape product development

WHAT'S NEXT?

Everyday staples sustain future growth amid mature consumption patterns

Private label continues to expand through affordability and improved perception

Discounters and convenience stores reinforce accessibility while e-commerce evolves

COMPETITIVE LANDSCAPE

Artisanal baked goods strengthen appeal through quality, freshness and authenticity

Vivera capitalises on plant-based momentum with broad retail presence

CHANNELS

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Convenience stores gain ground through proximity and flexible shopping missions

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