Rice, Pasta and Noodles in Indonesia

November 2025

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Price pressures, health trends, and e-commerce shape rice, pasta and noodles in 2025

INDUSTRY PERFORMANCE

Resilient performance despite ongoing price pressures
Noodles benefits from convenience trends

WHAT'S NEXT?

Economic recovery set to drive demand for premium meal solutions
Health awareness to influence future preferences and product development
Cultural trends, influencer campaigns and experiential marketing crucial for driving consumer engagement

COMPETITIVE LANDSCAPE

Indofood maintains convincing leadership of fragmented competitive landscape
Samyang Ramyun's dynamic growth driven by flavour innovation and enhanced visibility

CHANNELS

Established network of small local grocers ensures access to staple goods
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Staple Foods in Indonesia - Industry Overview

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Consumers of staple foods navigate ongoing price pressures

Digital-first approach to marketing convenient meal solutions

Innovation emerges as crucial point of differentiation to drive growth

Health trends influence purchasing decisions and product development

WHAT'S NEXT?

Economic recovery and rising urbanisation to drive future growth of staple foods

Demand for functional staple foods to be driven by health trends

Indonesians to be increasingly influence by social media trends

COMPETITIVE LANDSCAPE

Indofood Sukses Makmur Tbk PT retains lead of highly fragmented landscape

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