



Staple Foods in India

January 2026

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Staple Foods in India

EXECUTIVE SUMMARY

Rice remains central to staple foods' performance

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INDUSTRY PERFORMANCE

Convenience is a consumption driver

Consumers look for nutritional value

Pursuit of wellness covers a myriad of aspects in staple foods

WHAT'S NEXT?

Further fast retail value growth projected for staple foods

Modern channels to increase the pressure on small local grocers

Government regulations to improve transparency and affordability

COMPETITIVE LANDSCAPE

The competitive landscape remains highly fragmented

Health consciousness increases the focus on brands offering quality, transparency and minimal processing

CHANNELS

Small local grocers enjoy unmatched last-mile connectivity

Large modern grocery retailers and e-commerce increase their weight in staple foods distribution

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Steady growth in demand for baked goods driven by convenience and versatility

INDUSTRY PERFORMANCE

Emphasis on nutritional benefits

Players focus on pack sizes and flavours to provide a competitive edge for packaged cakes and pastries

WHAT'S NEXT?

Evolving lifestyle patterns to increase the consumption of bread

Government initiatives and low penetration offer substantial growth potential for packaged cakes and pastries

Expansion in distribution reach and prospective labelling regulatory revisions to drive consumer access and scrutiny

COMPETITIVE LANDSCAPE

Britannia Industries leads with a well-rounded product portfolio and widespread distribution reach

Health and wellness trend and quick-commerce disrupt the competitive landscape

CHANNELS

E-commerce leverages wider assortments and convenience to post the fastest retail value sales and share growth

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2025 DEVELOPMENTS

Evolving lifestyles and consumption needs drive growth in breakfast cereals

INDUSTRY PERFORMANCE

Breakfast cereals cater to the need for a functional, efficiency-driven meal

Multi-occasion consumption amid holistic health consciousness

WHAT'S NEXT?

Preference for breakfast cereals to be influenced by health-conscious consumers

Scaling to smaller cities through affordable packs is a key penetration focus

Tax reduction to aid affordability while labelling regulatory revisions increase consumer scrutiny

COMPETITIVE LANDSCAPE

Kellogg India leads with a strong and widely distributed product portfolio

New entrants and digital-first brands threaten to disrupt the competitive landscape

CHANNELS

Modern retail formats cater to urban consumers to gain ground on small local grocers

Quick-commerce offers convenience, broad assortments and drives premiumisation

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience is a key advantage amidst a consumer preference for fresh food

INDUSTRY PERFORMANCE

High convenience for hectic lifestyles underpins the consumer interest in processed fruit and vegetables

Developments add dynamism to the retail and foodservice offer

WHAT'S NEXT?

Shelf stable fruit and vegetables to remain hampered by limited availability and low awareness

Players to leverage more affordable packs to encourage consumer trials

Economic improvements and government initiatives to stimulate demand while growing health consciousness may hamper the frequency of consumption

COMPETITIVE LANDSCAPE

McCain Foods India enjoys a clear lead with a strong product portfolio and widespread distribution

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CHANNELS

Large modern grocery retailers gain on small local grocers

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and convenience trends stimulate category growth

INDUSTRY PERFORMANCE

Protein-focused value proposition drives robust demand for soya chunks

Frozen processed poultry rides strong health perception to post the fastest retail value sales growth in 2025

WHAT'S NEXT?

Strong retail volume and value growth forecast is driven by health-focused propositions

Modern retail formats and government initiatives to drive the penetration of frozen products

Processed meat and seafood consumption to remain an urban phenomenon

COMPETITIVE LANDSCAPE

Legacy brands continue to lead the field

Digital-first brands gain momentum among young, tech-savvy urban consumers

CHANNELS

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Rice, Pasta and Noodles in India

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rice, pasta and noodles continue to develop and grow fast in India

INDUSTRY PERFORMANCE

Rice benefits from established consumption habits and cultural preferences

Noodles and pasta benefit from convenient snacking needs

WHAT'S NEXT?

Evolving consumer lifestyles and competition to provide push-pull factors for pasta and noodles

Rice poised for robust demand, with health and wellness supporting premiumisation

Distribution and government regulation to help shape category development

COMPETITIVE LANDSCAPE

The highly fragmented rice landscape allows the noodles and pasta player Nestlé to lead overall
New-age brands add dynamism to the competitive landscape of instant noodles

CHANNELS

Small pack sizes add dynamism to the offer in small local grocers

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