



Staple Foods in China

November 2025

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Staple Foods in China

EXECUTIVE SUMMARY

Private label gaining share while health is also in focus

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INDUSTRY PERFORMANCE

Maturity and economic conditions constrain growth

Demographic developments boost demand for breakfast cereals

WHAT'S NEXT?

Maturity remains a key factor

Opportunities for health focused development

COMPETITIVE LANDSCAPE

Strong private label presence

Stable competitive landscape

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Baked goods demonstrates steady growth momentum

Strong growth for dessert pies and tarts

WHAT'S NEXT?

Penetration rate of baked goods in China expected to increase steadily

Health and wellness becomes a highly prominent topic in baked goods

Rise of large-scale bakery outlets in lower-tier cities in China

COMPETITIVE LANDSCAPE

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[Breakfast Cereals in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health concerns boost hot cereals

INDUSTRY PERFORMANCE

Breakfast cereals sees further growth, with hot cereals performing well

RTE cereals faces challenges

WHAT'S NEXT?

Expansion in elderly population expected to boost growth in hot cereals

Youth demand drives evolution of China's breakfast cereals market

Muesli and granola seeing product innovation in terms of fortification

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Industry consolidation is expected with top players continuing to expand their market share

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Rising health awareness undermines demand

WHAT'S NEXT?

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Struggling to resonate with evolving health trends

Redefining processed fruit with herbal infusions and clean labels

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[Rice, Pasta and Noodles in China](#)

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INDUSTRY PERFORMANCE

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Pasta struggling to compete with instant noodles

WHAT'S NEXT?

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The spicy noodles boom reflects segmentation trend in China's instant noodles market

Development of the private label segment

COMPETITIVE LANDSCAPE

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