



# Staple Foods in Asia Pacific

March 2025

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## REGIONAL OVERVIEW

Asia Pacific to become the biggest regional market for sales of staple foods in 2025

Positive growth will be seen throughout the 2019-2029 period

Asia Pacific the clear leader in terms of rice, pasta and noodles sales

Strong growth for rice, pasta and noodles in India over 2019-2024

Japanese consumers appreciative of quick and easy, but healthy, meal solutions

Rice, pasta and noodles account for the bulk of new sales over 2019-2024

Increasing health awareness driving developments in staple foods in China

Price rises ease in Japan, but are still negatively impacting the sales performance

Supermarkets and small local grocers the main distribution channels

Retail e-commerce continues gaining share

## LEADING COMPANIES AND BRANDS

Fragmented competitive landscapes for staple foods in most Asia Pacific countries

Generics account for more than three quarters of Japanese chilled processed seafood sales

Leading branded players tend to have a relatively limited presence in different countries

Baixiang moves into the top 10 brand rankings in Asia Pacific

## FORECAST PROJECTIONS

Positive volume and value growth expected throughout the forecast period

Declining birth rate impacting sales of staple foods in Japan

Dynamic Indian and Indonesian markets will be helping to drive regional growth

## COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

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