



Rice, Pasta and Noodles in Germany

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising interest in convenience and freshness

INDUSTRY PERFORMANCE

Social media driven noodles power a category uptick

Chilled pasta benefits from evolution of consumer demand towards convenience and freshness

WHAT'S NEXT?

Convenience and health tilt the category upward despite near-term pressure

Protein and vegan-positioned lines may move from niche to mainstream

Social commerce and viral noodle trends fuel youth-driven growth

COMPETITIVE LANDSCAPE

Barilla remains the leader but comes under increasing private label pressure

Hilcona creating new consumption occasions for chilled gnocchi

CHANNELS

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Staple Foods in Germany - Industry Overview

EXECUTIVE SUMMARY

Affordability, convenience, and health are primary considerations

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

High levels of budget consciousness

Affordability and clarity prove key

WHAT'S NEXT?

Brands need to show clear, everyday benefits in face of strong private label competition

Private label to quickly mirror brand moves

Discounters to remain key, while online channel continues to develop

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Major retailers lead

Simplicity and practicality are key to success

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