



# Rice, Pasta and Noodles in Western Europe

January 2023

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## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe the fourth biggest regional market

Steady growth expected as the market settles down post-pandemic

Italy boasts the world's highest per capita consumption rate for pasta

Strong growth in Turkey, especially for pasta and noodles

Pasta the dominant product in Western Europe

Rice, pasta and noodles offer affordable meal solutions at a time of rising prices

Modern grocery retailers dominate sales of rice, pasta and noodles

E-commerce share continues growing, but remains relatively modest

## LEADING COMPANIES AND BRANDS

Private label accounts for around a third of overall value sales

Pasta maker Barilla Holdings makes share gains over 2017-2022

Barilla and private label have a presence across the region

Nuhun Ankara continues moving up the brand rankings

## FORECAST PROJECTIONS

Positive growth expected for rice, pasta and noodles over the forecast period

Turkey will remain the most dynamic market in Western Europe

Habit persistence will help drive growth in Turkey

## COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

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Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

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