



Rice, Pasta and Noodles in Asia Pacific

January 2023

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Key findings

REGIONAL OVERVIEW

Asia Pacific remains the largest regional market for rice, pasta and noodles

Positive growth to continue over the forecast period for regional rice, pasta and noodles

India's dynamic performance narrows the value gap with the top three markets

Rice and noodles still dominate regional sales, but pasta remains most dynamic

Noodles is the biggest value contributor over 2017-2022

Shifting consumer preferences influence the performances of the leading markets

Retail e-commerce makes gains in several Asia Pacific countries...

...but small local grocers remain important retail outlets for many consumers

LEADING COMPANIES AND BRANDS

Small and niche players dominate or are growing in the biggest markets

Ting Hsin International Group maintains its regional lead of rice, pasta and noodles

Focus on a single market characterises several of the top 10 players

Master Kong and Nissin maintain their regional leadership positions

FORECAST PROJECTIONS

Steady growth forecast for Asia Pacific over 2022-2027

Dynamic 2022-2027 performances for Indonesia and India, but slower growth in China

Habit persistence will be an important growth driver in India in the coming years

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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India: Competitive and Retail Landscape

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