Euromonitor International

Rice, Pasta and Noodles in the United States

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KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

Stable value growth persists as unit prices rebound amid spending pressures
Rice leads value sales, noodles sees dynamic growth through instant varieties, and pasta sees innovation
Buldak rebrands mascot to fend off cheaper imitators as affordability pressures mount
Chart 1 Value Sales 2021-2031
Chart 2 Volume Sales 2021-2031
Chart 3 Value Sales by Category 2026

WHAT'S NEXT?

Sales of noodles set to overtake rice to lead as instant varieties fuel sales
Noodles set to see dynamic growth, with rice and pasta to see lower increases due to maturity
FDA labelling proposals and wellness concerns likely to reshape product development
Chart 1 Forecast Value Sales 2021-2031
Chart 2 Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Toyo Suisan leads thanks to an entrenched position in noodles
Private label and Samyang capitalise on affordability to challenge leaders
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Large-format and value retailers dominate as affordability shapes channel choices
Retail e-commerce exceeds hypermarkets in rice and pasta as omnichannel strategies mature
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Innovation responds to polarised consumer needs
Brands pursue dual strategies through rebranding and reformulation
Competitive dynamics hinge on authenticity and differentiation

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