



Rice, Pasta and Noodles in Bolivia

November 2025

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2025 DEVELOPMENTS

Rice and pasta remain Bolivian staples despite inflation and supply challenges

INDUSTRY PERFORMANCE

Rising input costs and illicit trade undermine availability of rice and dried pasta

Dried pasta records strongest growth

WHAT'S NEXT?

Steady growth expected, with rice and dried pasta remaining staples of Bolivian diet

Potential to expand dried pasta production using local endemic grains with superior nutritional attributes

Continued currency devaluation likely to fuel growth of the illicit rice market

COMPETITIVE LANDSCAPE

Caisy maintains its lead amid growing consumer price sensitivity

Players gain momentum through focus on affordability

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Supermarket expansion stalls as e-commerce struggles to gain mainstream adoption

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EXECUTIVE SUMMARY

Inflation and supply challenges drive value growth amid stagnant demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation drives value growth amid stagnant demand
Supply chain challenges reshape business priorities
Constrained budgets slow premiumisation

WHAT'S NEXT?

Modest growth anticipated, with affordability remaining key consideration
Health and nutrition trends shape innovation
Sustainability claims will grow in importance

COMPETITIVE LANDSCAPE

Caisy maintains its lead amid growing consumer price sensitivity
Players gain momentum through focus on affordability

CHANNELS

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