



Rice, Pasta and Noodles in Guatemala

November 2025

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2025 DEVELOPMENTS

Rice continues to be key part of local diet

INDUSTRY PERFORMANCE

Steady growth in 2025

Instant noodle cups gain most value share

WHAT'S NEXT?

Rosy outlook over forecast period

Space for noodles with a healthier positioning

More niche segments need to be affordable

COMPETITIVE LANDSCAPE

Arrocera Los Corrales holds near monopoly in rice

Private label also has a presence

CHANNELS

Small local grocers continue to dominate

E-commerce gains most value share

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EXECUTIVE SUMMARY

Stable growth, supported by continuing population growth

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INDUSTRY PERFORMANCE

Players adapt to high price sensitivity
Less mature segments register higher value growth
Rising health consciousness influencing product development

WHAT'S NEXT?

Stable outlook over forecast period
Growing demand for healthier options
Increasing interest in ethnic cuisines

COMPETITIVE LANDSCAPE

Local players have significant foothold, though multinationals also have a presence
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CHANNELS

Small local grocers continue to dominate
E-commerce gains most value share

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