



Rice, Pasta and Noodles in Singapore

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation lifts retail value sales as consumer preferences become more sophisticated

INDUSTRY PERFORMANCE

Rice dominates but instant noodles sees significant new product development

Rising interest in Western-style cooking and premiumisation spur dried pasta

WHAT'S NEXT?

A level of maturity in key categories is set to constrain the overall growth trajectory

Nutri-Grade labelling and advertising regulations to be extended to a range of food items, including instant noodles

Foodservice tie-ups to remain a key way to drive consumer engagement and momentum

COMPETITIVE LANDSCAPE

The leading brand's offer is strengthened by product innovation in 2025

Private label underpins the performance of NTUC FairPrice Co-operative

CHANNELS

Supermarkets dominate distribution with extensive assortments and high accessibility

Fast development of online platforms penetrates the distribution of rice, pasta and noodles

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EXECUTIVE SUMMARY

Premiumisation and innovation amidst maturity spur retail value over volume sales growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Dried pasta and muesli and granola see the highest growth in retail value sales
Premiumisation and flavour profiles stimulate baked goods and instant noodles
Convenience underpins new launches in baked goods and frozen processed poultry

WHAT'S NEXT?

State support and new entries offer growth opportunities
New offerings to cater to an increasingly health-conscious consumer base
The foodservice tie-up is expected to remain a key strategy

COMPETITIVE LANDSCAPE

PSC Corp leverages strength in tofu to lead staple foods
Shift in dietary preferences boosts the performance of Weetabix's Alpen

CHANNELS

Supermarkets develop through digitalisation, strategic partnerships and value propositions
Functionality, accessibility and safety improvements are behind e-commerce's strong retail value sales growth

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