



Rice, Pasta and Noodles in Chile

November 2025

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2025 DEVELOPMENTS

Affordable Chinese brands boost rice sales

INDUSTRY PERFORMANCE

Export restrictions and price adjustments shape rice, pasta, and noodles

Stabilisation of rice supply

WHAT'S NEXT?

Moderate growth expected amid climate and consumer shifts

Wholegrain pastas gain traction

Chilean rice market focuses on premium, organic, and low-impact varieties

COMPETITIVE LANDSCAPE

Carozzi expands technology and boosts sustainability

Empresas Tucapel leads growth

CHANNELS

Rice, pasta, and noodles sees supermarkets lead

Neighbourhood stores gaining momentum

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EXECUTIVE SUMMARY

Inflation and uncertainty encourage search for value

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Responding to challenges posed during previous year
Ongoing uncertainty affecting consumer behaviour

WHAT'S NEXT?

Rise in health consciousness and environmental awareness
Persistent interest in private label products
Health and wellness and sustainability influencing demand across categories

COMPETITIVE LANDSCAPE

Strong demand for artisanal bread
Tucapel expanding strongly

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