



Rice, Pasta and Noodles in New Zealand

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Home cooking, value-seeking and multicultural eating underpin robust category growth

INDUSTRY PERFORMANCE

Home cooking and value polarisation support ongoing category expansion
Pasta outperforms as chilled formats and premium offerings gain visibility

WHAT'S NEXT?

Category set for continued expansion as pasta and rice lead forecast growth
Health-led innovation reshapes dried pasta and noodle offerings
Chilled pasta innovation broadens fresh, convenient meal solutions

COMPETITIVE LANDSCAPE

James Crisp leverages SunRice and demographic shifts to consolidate rice leadership
Woolworths accelerates private label and chilled innovation to strengthen its role

CHANNELS

Supermarkets remain central as value, promotions and private label shape shopping patterns
Shift toward larger formats and online reordering reshapes secondary channels

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EXECUTIVE SUMMARY

Economic pressures, shifting dietary priorities and evolving retail strategies shape performance in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health, naturalness and sustainability reshape expectations of everyday staples

Retailers expand curated free-from and plant-forward assortments to support conscious shopping

Reassessment of plant-based credentials shifts focus from hype to authenticity and quality

WHAT'S NEXT?

Steady growth outlook supported by economic recovery, home-cooking habits and value-seeking behaviour

Innovation will centre on wellness, functionality and credible sustainability

Private label expansion and evolving retail strategies will reshape competition and channel dynamics

COMPETITIVE LANDSCAPE

Goodman Fielder reinforces leadership through portfolio breadth, health positioning and brand revitalisation

Foodstuffs capitalises on private label strength and value positioning amid cost-of-living pressures

CHANNELS

Supermarkets remain dominant but face mounting scrutiny and pressure for structural reform

E-commerce grows gradually as retailers refine delivery models and consumers weigh cost versus convenience

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