



Euromonitor
International

Staple Foods in India

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Staple Foods in India

EXECUTIVE SUMMARY

Rice remains central to staple foods' performance

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INDUSTRY PERFORMANCE

Convenience is a consumption driver

Consumers look for nutritional value

Pursuit of wellness covers a myriad of aspects in staple foods

WHAT'S NEXT?

Further fast retail value growth projected for staple foods

Modern channels to increase the pressure on small local grocers

Government regulations to improve transparency and affordability

COMPETITIVE LANDSCAPE

The competitive landscape remains highly fragmented

Health consciousness increases the focus on brands offering quality, transparency and minimal processing

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Small local grocers enjoy unmatched last-mile connectivity

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Players focus on pack sizes and flavours to provide a competitive edge for packaged cakes and pastries

WHAT'S NEXT?

Evolving lifestyle patterns to increase the consumption of bread

Government initiatives and low penetration offer substantial growth potential for packaged cakes and pastries

Expansion in distribution reach and prospective labelling regulatory revisions to drive consumer access and scrutiny

COMPETITIVE LANDSCAPE

Britannia Industries leads with a well-rounded product portfolio and widespread distribution reach

Health and wellness trend and quick-commerce disrupt the competitive landscape

CHANNELS

E-commerce leverages wider assortments and convenience to post the fastest retail value sales and share growth

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[Breakfast Cereals in India](#)

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Breakfast cereals cater to the need for a functional, efficiency-driven meal

Multi-occasion consumption amid holistic health consciousness

WHAT'S NEXT?

Preference for breakfast cereals to be influenced by health-conscious consumers

Scaling to smaller cities through affordable packs is a key penetration focus

Tax reduction to aid affordability while labelling regulatory revisions increase consumer scrutiny

COMPETITIVE LANDSCAPE

Kellogg India leads with a strong and widely distributed product portfolio

New entrants and digital-first brands threaten to disrupt the competitive landscape

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[Processed Fruit and Vegetables in India](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience is a key advantage amidst a consumer preference for fresh food

INDUSTRY PERFORMANCE

High convenience for hectic lifestyles underpins the consumer interest in processed fruit and vegetables

Developments add dynamism to the retail and foodservice offer

WHAT'S NEXT?

Shelf stable fruit and vegetables to remain hampered by limited availability and low awareness

Players to leverage more affordable packs to encourage consumer trials

Economic improvements and government initiatives to stimulate demand while growing health consciousness may hamper the frequency of consumption

COMPETITIVE LANDSCAPE

McCain Foods India enjoys a clear lead with a strong product portfolio and widespread distribution

Del Monte and Safal foster interest in shelf stable fruit and frozen processed vegetables, respectively

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[Processed Meat, Seafood and Alternatives To Meat in India](#)

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Health and convenience trends stimulate category growth

INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Strong retail volume and value growth forecast is driven by health-focused propositions

Modern retail formats and government initiatives to drive the penetration of frozen products

Processed meat and seafood consumption to remain an urban phenomenon

COMPETITIVE LANDSCAPE

Legacy brands continue to lead the field

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[Rice, Pasta and Noodles in India](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rice, pasta and noodles continue to develop and grow fast in India

INDUSTRY PERFORMANCE

Rice benefits from established consumption habits and cultural preferences

Noodles and pasta benefit from convenient snacking needs

WHAT'S NEXT?

Evolving consumer lifestyles and competition to provide push-pull factors for pasta and noodles

Rice poised for robust demand, with health and wellness supporting premiumisation

Distribution and government regulation to help shape category development

COMPETITIVE LANDSCAPE

The highly fragmented rice landscape allows the noodles and pasta player Nestlé to lead overall

New-age brands add dynamism to the competitive landscape of instant noodles

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