Staple Foods in Portugal

November 2025

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Baked Goods in Portugal

Continued steady growth underpinned by essential demand and premiumisation
Health and functional benefits to drive product differentiation
Industry reformulation and regulation encourage healthier recipes

COMPETITIVE LANDSCAPE

Artisanal dominance complemented by Continente's leadership in branded baked goods
Continente's dynamic performance driven by constant innovation and personalised promotions

CHANNELS

Supermarkets remain dominant as promotional hubs for bakery shopping
Retail e-commerce expands through convenience and spending control

CATEGORY DATA

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Breakfast Cereals in Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising costs, health positioning and trading down shape category dynamics

INDUSTRY PERFORMANCE

Value growth supported by premium launches amid softening volumes
Health-led innovation fuels flakes segment performance

WHAT'S NEXT?

Moderate growth ahead as prices stabilise and functional benefits gain weight
Gradual sugar reduction and reformulation to address obesity concerns
Whole grains, local sourcing and sustainable packaging gain prominence

COMPETITIVE LANDSCAPE

Nestlé consolidates leadership through segmented innovation and strong branding
Pingo Doce leverages private label strength and health-led extensions

CHANNELS

Supermarkets remain the core platform for innovation and promotion
Retail e-commerce grows as a tool for convenience and budget control

CATEGORY DATA

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2025 DEVELOPMENTS

Higher prices and health concerns reshape consumption patterns

INDUSTRY PERFORMANCE

Value sales rise amid cost pressures and shifting consumption habits

Shelf-stable seafood maintains leadership through innovation and trust

WHAT'S NEXT?

Gradual recovery expected, driven by seafood and value repositioning

Health and wellness concerns reshape product development

Sustainability and efficiency remain key industry priorities

COMPETITIVE LANDSCAPE

Continente maintains leadership through private label strength and certified sourcing

Cofaco drives growth through innovation and brand heritage

CHANNELS

Supermarkets remain the primary purchase channel

Retail e-commerce gains traction through convenience and visibility

CATEGORY DATA

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Rice, Pasta and Noodles in Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation, convenience and new consumption habits sustain growth

INDUSTRY PERFORMANCE

Value and volume growth supported by innovation and convenience

Instant noodles lead growth with flavour innovation and affordability

WHAT'S NEXT?

Continued expansion supported by convenience, innovation and demographic change

Health-driven innovation and indulgence coexist

Sustainability and local sourcing take centre stage

COMPETITIVE LANDSCAPE