Staple Foods in Pakistan

November 2025

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Staple Foods in Pakistan

EXECUTIVE SUMMARY

Expansion of modern retail fuels staple food sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience and urbanisation drive robust growth

Consumers shift from unpackaged to packaged formats mid rising focus on food safety and quality

Affordability remains key as local production expands

WHAT'S NEXT?

Changing lifestyles and retail formalisation will drive growth

Competition will intensify as players expand their portfolios and invest in geographical expansion

Health and wellness trend will gain traction in urban areas

COMPETITIVE LANDSCAPE

Engro leads fragmented landscape

Matco gains share at expense of smaller competitors

CHANNELS

Small local grocers face growing competition from modern trade

E-commerce shows rapid expansion

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Convenience, health and premiumisation drive growth

INDUSTRY PERFORMANCE

Unpackaged leavened bread continues to serve as traditional staple

Unpackaged flat bread leads growth, while frozen baked goods finds a niche

WHAT'S NEXT?

Steady growth amid dual market dynamics

Growing interest in more nutritious "better for you" offerings

Premiumisation set to drive growth

COMPETITIVE LANDSCAPE

Golden Harvest Foods remains market leader

Convenience Food Industries sees rapid growth driven by urban appeal of Laziza

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KEY DATA FINDINGS

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Busier lifestyles and health and wellness trends facilitate shift to more convenient breakfast options

INDUSTRY PERFORMANCE

Urbanisation and health trends drive growth

Children's breakfast cereals represents key manufacturer focus

WHAT'S NEXT?

Westernisation to boost growth

Health-focused cereals will attract consumer interest

Eco-friendly packaging will drive differentiation

COMPETITIVE LANDSCAPE

Fauji remains dominant player

PepsiCo benefits from healthy perception of oat-based offerings

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Small local grocers lose share as modern retail gains ground

E-commerce is most dynamic channel

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Frozen processed seafood leads growth

WHAT’S NEXT?

Growth of private label to fuel expansion

Rising focus on health and hygiene will facilitate shift towards packaged offerings

Cold chain advancements will unlock new growth opportunities

COMPETITIVE LANDSCAPE

K&N's Foods continues to lead sales

Sabirs’ Group expands reach through affordable, hygienic ready-to-cook solutions

CHANNELS

Small local grocers remain important despite growth of modern retail

E-commerce continues to gain ground

CATEGORY DATA

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Rice, Pasta and Noodles in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Urbanisation facilitates shift towards convenient, high-quality packaged offerings

INDUSTRY PERFORMANCE

Rising urban lifestyles boost demand for packaged rice, pasta, and noodles

Rice shows particularly strong performance, thanks to its essential role in local cuisine

WHAT’S NEXT?

Q-commerce to drive growth in rice, pasta, and noodles

Health-focused offerings will gain prominence in noodles and pasta

Regional flavours will drive differentiation and enhance customer engagement

COMPETITIVE LANDSCAPE

CHANNELS

CATEGORY DATA

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