



Cooking Ingredients and Meals in Pakistan

November 2025

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EXECUTIVE SUMMARY

Economic stabilisation, urbanisation and busy lifestyles boost growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic stabilisation and urbanisation fuel strong growth in cooking ingredients and meals

Consumer experimentation and portfolio diversification drive industry growth

Health and sustainability concerns shape industry innovation

WHAT'S NEXT?

Urbanisation and lifestyle shifts will contribute to rapid growth

Health and wellness will drive innovation

Digital channels to unlock new growth opportunities

COMPETITIVE LANDSCAPE

Dalda Foods maintains its market leadership through heritage, trust, and reach

Shujabad Agro Industries emerges as most dynamic player

Market remains highly fragmented

CHANNELS

Small local grocers dominate sales

Retail channels are evolving rapidly

E-commerce emerges as most dynamic channel

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Growing health awareness, urbanisation and economic stabilisation fuel growth

INDUSTRY PERFORMANCE

Robust growth for edible oils, despite enduring price sensitivity

Sunflower oil gains traction on back of growing health awareness

WHAT'S NEXT?

Private labels and value-priced oils to gain traction amid continuing economic pressures

Urban consumers seek healthier edible oils within accessible price ranges

Sustainable practices will slowly gain ground

COMPETITIVE LANDSCAPE

Dalda Foods maintains its dominance

Shujabad Agro Industries emerges as most dynamic player

CHANNELS

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2025 DEVELOPMENTS

Sales limited by strong preference for home cooking but affluent urbanites drive growth in premium niches

INDUSTRY PERFORMANCE

Meals and soups market remains underdeveloped as consumers favour fresh, home-cooked food

Dry soup leads growth

WHAT'S NEXT?

Meals and soups will remain a very niche market

Health-focused innovations will grow in prominence

Technological innovations will enhance convenience

COMPETITIVE LANDSCAPE

Unilever's Knorr is only significant player

CHANNELS

Leading channel

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Urbanites increasingly experiment with international flavours

INDUSTRY PERFORMANCE

Urbanisation drives diversification in sauces, dips and condiments

Soy sauce benefits from growing interest in international cuisine

WHAT'S NEXT?

Domestic market still offers much potential

Products with a health-oriented positioning will begin to emerge

Sustainable practices will gain traction

COMPETITIVE LANDSCAPE

National Foods lead sales

Shan Foods expands through innovation

CHANNELS

Small local grocers remains largest channel for sauces, dips and condiments

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2025 DEVELOPMENTS

Urbanisation and busy lifestyles encourage demand for convenient Westernised breakfast options

INDUSTRY PERFORMANCE

Growing westernisation of breakfast habits

Nut and-seed based spreads gain traction amongst health-conscious consumers

WHAT'S NEW?

Expanding opportunities in underserved urban centres

Health and wellness trends to drive growth in nut and seed based spreads

Premiumisation and flavour innovation will redefine the market

COMPETITIVE LANDSCAPE

National Foods leads fragmented market

Langnese Honig capitalises on growing demand for premium honey

CHANNELS

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