Staple Foods in India

January 2026

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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
Preference for affordable, artisanal baked goods through traditional grocery retailers

CATEGORY DATA

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Breakfast Cereals in India

KEY DATA FINDINGS

2025 DEVELOPMENTS

Evolving lifestyles and consumption needs drive growth in breakfast cereals

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

CHANNELS

Modern retail formats cater to urban consumers to gain ground on small local grocers
Quick-commerce offers convenience, broad assortments and drives premiumisation

CATEGORY DATA

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Processed Fruit and Vegetables in India

Processed Meat, Seafood and Alternatives To Meat in India

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and convenience trends stimulate category growth

INDUSTRY PERFORMANCE

Protein-focused value proposition drives robust demand for soya chunks

Frozen processed poultry rides strong health perception to post the fastest retail value sales growth in 2025

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

Digital-first brands gain momentum among young, tech-savvy urban consumers

CHANNELS

Small local grocers enjoy wide reach to dominate the landscape

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CATEGORY DATA

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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

CHANNELS

Small pack sizes add dynamism to the offer in small local grocers

Modern retailers increasingly influence the demand for premium variants

CATEGORY DATA

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