



Euromonitor
International

Staple Foods in Portugal

November 2025

Table of Contents

Staple Foods in Portugal

EXECUTIVE SUMMARY

Price awareness, promotions and convenience continue to shape staple food consumption

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience products benefit from changing meal habits and time constraints

Health-focused staples gain ground as consumers seek balance and transparency

WHAT'S NEXT?

Continued price consciousness and growth of private label lines

Meat alternatives must simplify, improve and regain consumer trust

Convenience and sustainability to define future innovation

COMPETITIVE LANDSCAPE

Sonae Modelo Continente strengthens leadership through portfolio breadth and innovation

Panegara and Cofaco drive momentum through category focus and product innovation

CHANNELS

Supermarkets consolidate their leadership through reach, variety and promotions

Retail e-commerce continues to gain ground through convenience and alignment with in-store offers

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising costs and value-added innovation shape baked goods performance

INDUSTRY PERFORMANCE

Price inflation and premiumisation sustain value growth

Product innovation boosts packaged leavened bread performance

WHAT'S NEXT?

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

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025
Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price increases and convenience drive stable value growth

INDUSTRY PERFORMANCE

Value growth supported by cost inflation and steady consumption

Shelf-stable tomatoes lead growth through practicality and price appeal

WHAT'S NEXT?

Moderate growth outlook sustained by affordability and convenience

Health-conscious choices support balanced consumption

Sustainability and packaging innovation gain importance

COMPETITIVE LANDSCAPE

Continente consolidates leadership through scale and affordability

Pingo Doce leverages value-for-money positioning and health appeal

CHANNELS

Supermarkets remain dominant due to range and pricing

Retail e-commerce expands through convenience and choice

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in Portugal

KEY DATA FINDINGS

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

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Continente maintains leadership through private label dominance
Panegara and Unilever drive dynamism through innovation and communication

CHANNELS

Supermarkets remain the core distribution platform
Retail e-commerce expands through convenience and price transparency

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025
Table 69 - NBO Company Shares of Rice: % Value 2021-2025
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025
Table 76 - Distribution of Rice by Format: % Value 2020-2025
Table 77 - Distribution of Pasta by Format: % Value 2020-2025
Table 78 - Distribution of Noodles by Format: % Value 2020-2025
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-in-portugal/report.