

Staple Foods in Pakistan

November 2023

Table of Contents

Staple Foods in Pakistan

EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 7 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 8 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 9 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shifting consumer preferences in response to inflation

Competitive landscape increasingly fragmented

Packaged bread registers volume growth

PROSPECTS AND OPPORTUNITIES

Moderate growth over forecast period

Brands look to stand out through differentiation

Growing demand for packaged goods

CATEGORY DATA

Table 12 - Sales of Baked Goods by Category: Volume 2018-2023

Table 13 - Sales of Baked Goods by Category: Value 2018-2023

Table 14 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 15 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 16 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 17 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 18 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 19 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 20 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 21 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

Breakfast Cereals in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shifting breakfast habits amid economic challenges
Fauji Cereals maintains commanding lead
Increasingly healthier positioning in breakfast cereal

PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period
Local manufacturers focus on muesli
Increasing demand for on-the-go options

CATEGORY DATA

Table 23 - Sales of Breakfast Cereals by Category: Volume 2018-2023
Table 24 - Sales of Breakfast Cereals by Category: Value 2018-2023
Table 25 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023
Table 26 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023
Table 28 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023
Table 29 - Distribution of Breakfast Cereals by Format: % Value 2018-2023
Table 30 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028
Table 31 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028
Table 32 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028
Table 33 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

Processed Fruit and Vegetables in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value for money drives sales
Little brand loyalty in highly fragmented landscape
Frozen processed potatoes registers highest volume growth

PROSPECTS AND OPPORTUNITIES

Moderate growth over forecast period
Opportunity for growth in frozen processed fruit and vegetables
Health concerns limit the consumption of shelf stable fruit

CATEGORY DATA

Table 34 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023
Table 35 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023
Table 36 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023
Table 37 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023
Table 38 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023
Table 39 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023
Table 40 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023
Table 41 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028
Table 42 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028
Table 43 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

Processed Meat, Seafood and Alternatives To Meat in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Healthy volume growth as consumers appreciate convenience
K&N's Foods maintains leadership
Processed seafood registers higher volume growth than processed meat

PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period
Further investment necessary in chilled storage
Value sales of meat alternatives negligible

CATEGORY DATA

Table 45 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023
Table 46 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023
Table 47 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023
Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023
Table 49 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023
Table 50 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023
Table 51 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023
Table 52 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028
Table 53 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

Rice, Pasta and Noodles in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health volume growth for rice
Consolidated landscape across rice, pasta and noodles
More muted performance for pasta in 2023

PROSPECTS AND OPPORTUNITIES

Rice strongest performer over forecast period
Increasing demand for offerings with healthier positioning
Retail developments set to support growth

CATEGORY DATA

Table 54 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023
Table 55 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023
Table 56 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023
Table 57 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023
Table 58 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023
Table 59 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023
Table 60 - NBO Company Shares of Rice: % Value 2019-2023
Table 61 - LBN Brand Shares of Rice: % Value 2020-2023
Table 62 - NBO Company Shares of Pasta: % Value 2019-2023
Table 63 - LBN Brand Shares of Pasta: % Value 2020-2023
Table 64 - NBO Company Shares of Noodles: % Value 2019-2023
Table 65 - LBN Brand Shares of Noodles: % Value 2020-2023
Table 66 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023
Table 67 - Distribution of Rice by Format: % Value 2018-2023

Table 68 - Distribution of Pasta by Format: % Value 2018-2023

Table 69 - Distribution of Noodles by Format: % Value 2018-2023

Table 70 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028

Table 71 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028

Table 72 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028

Table 73 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

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-pakistan/report.