

Gluten-Free Pasta Market Forecasts to 2032 – Global Analysis By Product Type (Brown Rice Pasta, Quinoa Pasta, Chickpea Pasta and Blended Grain Pasta), Type (Dried, Chilled/Fresh and Ready-to-Eat), Composition, Distribution Channel and By Geography

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Abstracts

According to Statistics MRC, the Global Gluten-Free Pasta Market is accounted for \$8.14 billion in 2025 and is expected to reach \$14.15 billion by 2032 growing at a CAGR of 8.22% during the forecast period. Gluten-free pasta is a popular alternative to traditional wheat-based pasta, specially designed for individuals with gluten intolerance, celiac disease, or those choosing a gluten-free lifestyle. Gluten-free pasta is made from rice flour, corn, quinoa, chickpeas, or lentils and has a texture and flavor that are comparable to regular pasta but is easier for sensitive people to digest. Moreover, growing dietary preferences and increased health consciousness have led to a recent spike in demand for gluten-free pasta. Currently, it is widely accessible in various flavors and shapes, making it a flexible choice for both gourmet recipes and everyday meals.

According to the Gluten Intolerance Group (GIG), a leading nonprofit that offers gluten free certification, its Gluten Free Certification Organization (GFCO) certified over 9,300 products from more than 800 brands worldwide in 2022, assuring consumers that these products contain no more than 10 ppm of gluten.

Market Dynamics:

Driver:

Growing rates of gluten sensitivity and celiac disease

Gluten-free pasta consumption is largely driven by the increasing diagnosis of celiac disease, a severe autoimmune condition in which eating gluten damages the small intestine. According to the Celiac Disease Foundation, 83% of people with celiac disease go undiagnosed or are misdiagnosed, despite the fact that the condition affects 1% of people worldwide. Millions more people suffer from non-celiac gluten sensitivity, a condition in which gluten causes symptoms even in the absence of celiac disease. Additionally, dietary habits are changing as a result of increased medical awareness and testing frequency, which is driving up demand for approved gluten-free products like pasta that don't cause negative side effects.

Restraint:

Expensive in comparison to traditional pasta

One of the biggest obstacles is the high cost of gluten-free pasta. The use of specific ingredients, such as rice, legumes, or quinoa, and the extra production controls needed to avoid gluten contamination result in significantly higher manufacturing costs. Because of these expenses, gluten-free pasta is frequently 30–100% more expensive than regular wheat pasta. Furthermore, this deters price-conscious buyers, particularly in developing nations. Even in developed markets, low-income families may restrict their purchases or choose gluten-free products only in cases where they are medically required.

Opportunity:

Growing interest from the plant-based and vegan communities

A significant opportunity exists for manufacturers of gluten-free pasta due to the rise in veganism and plant-based diets. Many pastas that are naturally plant-based and free of gluten, especially those made from rice, corn, or legumes, appeal to consumers who want to consume fewer animal products. It is possible to increase market appeal by combining gluten-free qualities with plant-based or allergy-free claims. Products that are dual-labeled as vegan and gluten-free can help brands simultaneously reach two quickly expanding markets.

Threat:

Growing competition from alternative and conventional diets

The growing competition from traditional wheat-based pasta and other new diet-specific products, like keto, paleo, and low-carb substitutes, is one of the biggest risks facing the market for gluten-free pasta. Nowadays, a lot of consumers are following grain-free or low-carb diets, and even gluten-free pasta is thought to contain too many carbohydrates. For general wellness consumers who do not need to avoid gluten for medical reasons, this change lessens the appeal of gluten-free pasta. Additionally, big pasta producers are experimenting with high-quality wheat products like high-protein or high-fiber pasta, which may drive customers away from gluten-free alternatives.

Covid-19 Impact:

The COVID-19 pandemic affected the market for gluten-free pasta in different ways. During lockdowns, consumers stocked up on shelf-stable and non-perishable foods, such as gluten-free pasta, which initially caused a spike in demand for the market. Further driving up consumption were greater health consciousness and interest in immune-supportive diets, especially among those who are gluten-sensitive and health-conscious. Global supply chains were also upset by the pandemic, which resulted in poor raw material availability, production hold-ups, and restricted product availability in some areas.

The brown rice pasta segment is expected to be the largest during the forecast period

The brown rice pasta segment is expected to account for the largest market share during the forecast period. Its firm texture, neutral flavor, and striking similarity to regular wheat pasta make it a popular choice for a variety of customers, including those who are not gluten intolerant. Due to its whole grain content, which includes fiber, vital minerals, and a low glycemic index, brown rice pasta is also thought to be a healthier choice. Its widespread availability in stores and online strengthens its position as the industry leader. Moreover, brown rice pasta remains at the top of the gluten-free market as global health-conscious eating trends continue to grow.

The quinoa pasta segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the quinoa pasta segment is predicted to witness the highest growth rate. Known as a superfood, quinoa is high in protein, fiber, and essential amino acids, which appeals to vegans, people with gluten intolerance, and health-conscious consumers. Its popularity is being fueled by the growing demand for nutrient-dense and functional foods. Additionally, quinoa pasta benefits from growing consumer preference

for plant-based diets and clean-label trends. Quinoa pasta is growing at the fastest rate in the gluten-free pasta market due to its increased availability in stores and online as well as rising awareness of its health advantages.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share. The region's dominance is fueled by widespread adoption of gluten-free diets, a high level of awareness of celiac disease, and supportive government regulations regarding gluten-free labeling. There is a high demand for pasta substitutes in nations like Italy, Germany, and the United Kingdom, and numerous European producers focus on high-end gluten-free products. Furthermore, the existence of well-known gluten-free brands, a sophisticated retail system, and an increasing number of health-conscious consumers all help to explain why Europe continues to dominate the global market for gluten-free pasta.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. A growing urban population embracing Western dietary practices, rising disposable incomes, and growing health consciousness are the main drivers of this quick growth. Diagnoses of gluten intolerance and the demand for gluten-free foods in countries like China, India, Japan, and Australia are on the rise due to lifestyle factors. Improvements in retail distribution, the growing popularity of plant-based and allergy-free diets, and the growing presence of health food brands are also driving the market.

Key players in the market

Some of the key players in Gluten-Free Pasta Market include Ebro Foods S.A., Doves Farm Foods Ltd., Jovial Foods Inc., The Hain Celestial Group, Inc, Banza LLC, Rummo S.p.A., Windmill Organics Ltd., Pastificio Lucio Garofalo S.p.A, Dr. Schar AG, Bionaturae LLC, RP's Pasta Company, Barilla, DeLallo and ZENB Inc.

Key Developments:

In April 2025, Dr. Schar USA, Inc announced a \$28 million investment in its production and office space in Swedesboro, NJ. This expansion reflects the company's ongoing commitment to quality, performance, and employee wellbeing. The expansion includes state-of-the-art enhancements to the bakery facility, aimed at improving product

consistency, efficiency, and overall baking excellence. Alongside the production upgrades, the company has prioritized creating a better environment for its employees.

In February 2022, The Ebro Group has reached a binding agreement to purchase the assets comprising the business of InHarvest. Inc. InHarvest is a US company with a strong presence in the industrial (B2B), Food Service and Private Label businesses for premium specialities in rice, quinoa and grains in the United States.

In February 2021, Barilla has announced its acquisition of Ebro Foods' Catelli dry pasta business in Canada, in a deal valued at CAD 165 million (approximately \$128.6 million). Ebro Foods, through its indirectly-owned Canadian subsidiary Catelli Foods Corporation, entered an agreement for the divestiture of its dry pasta business to Barilla.

Product Types Covered:

Brown Rice Pasta

Quinoa Pasta

Chickpea Pasta

Blended Grain Pasta

Types Covered:

Dried

Chilled/Fresh

Ready-to-Eat

Compositions Covered:

Rice

Corn

Quinoa

Chickpeas

Buckwheat

Legumes

Other Compositions

Distribution Channels Covered:

Supermarkets/Hypermarkets

Specialty Stores

Convenience/Grocery Stores

E-commerce

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical

presence, and strategic alliances

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