Staple Foods in Argentina

November 2025

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Baked Goods in Argentina

WHAT'S NEXT?

Economic recovery and product innovation to sustain growth
Bakeries adapt to health trends with reformulations and new formats
Innovation and reformulation drive packaged baked goods forward

COMPETITIVE LANDSCAPE

Artisanal tradition remains strong despite volume declines
Private label benefits from affordability and changing purchasing habits

CHANNELS

Bakeries and small grocers remain key distribution points
Modern retail channels face adjustment after end of price controls

CATEGORY DATA

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Breakfast Cereals in Argentina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic stabilisation supports only a mild rebound in breakfast cereals

INDUSTRY PERFORMANCE

Economic recovery lifts healthier cereal segments while children's cereals drag overall growth
Health-positioned cereals drive momentum as parents turn away from sugary options

WHAT'S NEXT?

Moderate growth expected as affordability and health trends shape demand
Health and wellness claims drive innovation and reshape category composition
Marketing restrictions under labelling law reshape product positioning

COMPETITIVE LANDSCAPE

Alimentos Granix and private label lead an increasingly value-driven category
Private label strengthens as Kellanova loses ground amid brand withdrawal

CHANNELS

Supermarkets and hypermarkets dominate cereal distribution
Hypermarkets face temporary slowdown but expected to recover over the forecast period

CATEGORY DATA

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

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rebound from a low base as inflation cools, stocking behaviour rises and premium frozen regains relevance

INDUSTRY PERFORMANCE

Value sales increase in 2025 as trading up resumes from emergency downtrading in 2024

Frozen poultry and frozen seafood lead growth on convenience, yield and freezer loading

WHAT'S NEXT?

Broad-based recovery expected, with frozen formats set to outpace on practicality and distribution strength

Health and flavour trends diverge by occasion as "better choices" coexist with indulgence

Front-of-pack labelling limits kid-targeted marketing but accelerates portfolio renovation

COMPETITIVE LANDSCAPE

Marfrig (Quickfood) and Paladini anchor leadership across frozen burgers and chilled cold cuts

Seafood specialists gain share; Molinos consolidates in frozen poultry while ceding ground in seafood

CHANNELS

Modern trade dominates distribution, especially for frozen where infrastructure matters most

Hypermarkets underperformed in 2024-2025 but are poised to recover as pricing rebalances

CATEGORY DATA

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Rice, Pasta and Noodles in Argentina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Recovery from a low base with affordability, easing inflation and brand entries shaping the rebound

INDUSTRY PERFORMANCE

Value sales increased in 2025 as staple meal builders held share and price pressures eased

Rice underperformed early expectations while noodles' progress remained gradual due to price, familiarity and access

WHAT'S NEXT?

Category set for steady growth, with mature pasta and rice trailing faster noodle gains as supply widens

Health shifts favour wholegrain formats in pasta and rice as consumers seek less processed grain options

Retail positioning and shopper education will shape noodle adoption as formats straddle soup and meal occasions

COMPETITIVE LANDSCAPE

Molinos Río de la Plata anchors pasta and rice while noodles remain led by global specialists

Noodle brands capture the fastest gains from wider listings and low-base effects, with niche players emerging

CHANNELS

Traditional trade remains critical for pasta and rice, while noodles skew to modern formats

Hypermarkets lagged in 2024-2025 but are positioned to regain share as pricing rebalances and promotions deepen

CATEGORY DATA

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