



**Euromonitor
International**

Staple Foods in Argentina

November 2025

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Staple Foods in Argentina

EXECUTIVE SUMMARY

Fragile recovery slows growth despite easing inflation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Black label regulation prompts reformulation rather than volume loss

Private label and modern retail adjust after the end of price controls

Consumers maintain cautious spending habits despite stabilisation

WHAT'S NEXT?

Gradual recovery and volume growth expected as economy stabilises

Manufacturers focus on healthier reformulations and innovation

Channel rebalancing and e-commerce expansion

COMPETITIVE LANDSCAPE

Molinos Río de la Plata maintains leadership across diverse staples

Frozen specialists outperform amid shifting consumption

CHANNELS

Traditional grocers retain dominance amid narrowed price gaps

End of price controls reshapes channel dynamics

Wholesalers attract household shoppers through flexible formats

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Baked Goods in Argentina

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Economic stabilisation supports a cautious recovery in baked goods

INDUSTRY PERFORMANCE

Recovery remains uneven across income groups as bakeries struggle to rebound

Packaged baked goods hold steady as consumers seek affordable convenience

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

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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
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Processed Fruit and Vegetables in Argentina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Normalisation from a low base, with freezer-friendly formats, price hedging and appliance adoption lifting demand

INDUSTRY PERFORMANCE

Value sales increase in 2025 as volumes recover and fresh price volatility redirects spend to processed

Frozen formats lead growth on convenience, lower waste and synergy with air fryer cooking

WHAT'S NEXT?

Gradual volume and value expansion expected as incomes recover and processed offers hedge fresh volatility

Health and quality narratives strengthen, with frozen positioned as nutrient-preserving and waste-minimising

Appliance adoption and retail execution will keep steering category premiumisation and trial

COMPETITIVE LANDSCAPE

Private label dominates shelf-stable while branded leaders anchor each frozen niche

Share shifts reaffirm existing trajectories: private label advances overall; Simplot inches up in potatoes

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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

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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

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