Euromonitor International

Snacks in Paraguay

August 2026

Table of Contents

Snacks in Paraguay

EXECUTIVE SUMMARY

2026 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Economic Stability Supports Premiumisation and Flavour Innovation
Ice Cream and Premium Snacks Post Rapid Expansion
Arcorpar, Amandau and Bimbo Capitalise on Emerging Flavour Trends
Chart 1 - Pistachio Flavour Is a Driving Force for Expansion
Chart 2 - Value Sales 2021-2031
Chart 3 - Value Sales by Category 2026

WHAT'S NEXT?

Economic Growth Expected to Support Sustained Demand for Snacks
Health and Wellness to Encourage Reformulation and Premium Innovation
Urbanisation Projected to Expand Access and Consumption Occasions
Chart 4 - Forecast Value Sales 2021-2031
Chart 5 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Local Players Strengthen Their Presence Despite Arcorpar'S Clear Lead
Chart 6 - Company Shares 2026
Chart 7 - Brand Shares 2026

CHANNELS

Modern Retail Gains Ground as Traditional Outlets Face Succession Pressures
Biggie Reshapes Impulse Purchasing through Convenience and Availability
Cash Dependence and Infrastructure Constraints Limit E-Commerce Growth
Chart 8 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 9 - Economic Context for Snacks
Chart 10 - Real Gdp Growth 2021-2031
Chart 11 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 12 - Consumer Context for Snacks
Chart 13 - Population 2021-2031
Chart 14 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Chocolate Confectionery in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Chocolate Confectionery Summary

INDUSTRY PERFORMANCE

Innovation and Improving Affordability Support Recovery in Chocolate Confectionery
Countlines Remain Dominant as Tablets Benefit From Flavour-Led Innovation

Sustainability and Local Sourcing Strengthen Premium Positioning
Chart 15 - Sustainable Chocolate Gains Ground
Chart 16 - Value Sales 2021-2031
Chart 17 - Volume Sales 2021-2031
Chart 18 - Value Sales by Category 2026

WHAT'S NEXT?

Affordable Countlines and Expanding Distribution to Sustain Long-Term Growth
Countlines Expected to Lead Sales While Chocolate with Toys Post Fastest Growth
Income Growth Set to Expand Opportunities beyond Major Urban Centres
Chart 19 - Forecast Value Sales 2021-2031
Chart 20 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Portfolio Breadth, Premium Niches and Innovation Shape Competition

CHANNELS

Local Grocers and Convenience Outlets Drive Impulse Chocolate Purchases
E-Commerce Remains Constrained by Infrastructure and Payment Challenges

ECONOMIC CONTEXT

Chart 21 - Economic Context for Chocolate Confectionery
Chart 22 - Real Gdp Growth 2021-2031
Chart 23 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 24 - Consumer Context for Chocolate Confectionery
Chart 25 - Population 2021-2031
Chart 26 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Gum in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Gum Summary

INDUSTRY PERFORMANCE

Gum Records Steady Growth Amid Changing Consumption Habits
Functional Packaging and Sugar-Free Products Support Value Growth
Chart 27 - Companies Are Developing Higher-Value Offerings
Chart 28 - Value Sales 2021-2031
Chart 29 - Volume Sales 2021-2031
Chart 30 - Value Sales by Category 2026

WHAT'S NEXT?

Rising Incomes and Regional Expansion to Support Future Growth
Health Priorities Expected to Accelerate Sugar-Free Innovation
Chart 31 - Forecast Value Sales 2021-2031
Chart 32 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Arcorpar Supports Its Position through Brand Strength, Innovation and Accessibility

CHANNELS

Convenience Retail Reshapes Distribution While Traditional Outlets Retain Their Relevance

ECONOMIC CONTEXT

Chart 33 - Economic Context for Gum
Chart 34 - Real Gdp Growth 2021-2031
Chart 35 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 36 - Consumer Context for Gum
Chart 37 - Population 2021-2031
Chart 38 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Sugar Confectionery in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sugar Confectionery Summary

INDUSTRY PERFORMANCE

Steady Expansion Supported by Rising Consumer Spending
Flavour Innovation Boosts Consumer Engagement
Chart 39 - Spicy Flavour Innovation Drives Expansion
Chart 40 - Value Sales 2021-2031
Chart 41 - Volume Sales 2021-2031
Chart 42 - Value Sales by Category 2026

WHAT'S NEXT?

Income Growth and Favourable Demographics Projected to Support Future Demand
Health Concerns to Encourage Reformulation and Reduced Sugar Innovation
Gummies and Jellies Expected to Retain Leadership While Chewy Candies Accelerate
Chart 43 - Forecast Value Sales 2021-2031
Chart 44 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Broad Portfolios and Innovation Support Strong Confectionery Brands

CHANNELS

Convenience Retail Expansion Influences Impulse Purchasing Habits
E-Commerce Remains Limited by Structural Constraints

ECONOMIC CONTEXT

Chart 45 - Economic Context for Sugar Confectionery
Chart 46 - Real Gdp Growth 2021-2031
Chart 47 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 48 - Consumer Context for Sugar Confectionery
Chart 49 - Population 2021-2031
Chart 50 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Ice Cream in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Ice Cream Summary

INDUSTRY PERFORMANCE

Premium Flavour Innovation and Health-Focused Diversification Drive Growth
Chart 51 - Healthier Alternatives Attract Consumers
Impulse Ice Cream Benefits From Stronger Convenience Channel Presence
Chart 52 - Value Sales 2021-2031
Chart 53 - Volume Sales 2021-2031
Chart 54 - Value Sales by Category 2026

WHAT'S NEXT?

Convenience Expansion and Innovation Poised to Support Sustained Growth
Impulse Ice Cream to Maintain Dominance While Frozen Yoghurt Records Fastest Growth
Innovation Expected to Strengthens Consumer Engagement
Chart 55 - Forecast Value Sales 2021-2031
Chart 56 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Amandau Strengthens Its Lead through Premium Innovation and Local Relevance
Chart 57 - Company Shares 2026
Chart 58 - Brand Shares 2026

CHANNELS

Biggie'S Expansion Supports Ice Cream Availability through Convenience Retail

ECONOMIC CONTEXT

Chart 59 - Economic Context for Ice Cream
Chart 60 - Real Gdp Growth 2021-2031
Chart 61 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 62 - Consumer Context for Ice Cream
Chart 63 - Population 2021-2031
Chart 64 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Savoury Snacks in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Savoury Snacks Summary

INDUSTRY PERFORMANCE

Takis Drives Flavour Innovation and Accelerates Growth in Salty Snacks
Savoury Biscuits Benefit From Changing Cross-Border Purchasing Patterns
Health and Wellness Gains Influence in Savoury Snacks
Chart 65 - Healthy Options Are Gaining Ground
Chart 66 - Value Sales 2021-2031

Chart 67 - Volume Sales 2021-2031
Chart 68 - Value Sales by Category 2026

WHAT'S NEXT?

Indel to Expand Affordable Savoury Snacks as Contraband Declines
Salty Snacks Expected to Strengthen Their Position among Younger Demographics
Distribution and Visibility Projected to Become Key Competitive Advantages
Chart 69 - Forecast Value Sales 2021-2031
Chart 70 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Indel Sa Strengthens Leadership through Innovation and Local Brand Appeal
Chart 71 - Company Shares 2026
Chart 72 - Brand Shares 2026

CHANNELS

Small Local Grocers Sustain Affordable Snacks as Modern Formats Rise
E-Commerce Remains Limited by Infrastructure and Delivery Constraints
Chart 73 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 74 - Economic Context for Savoury Snacks
Chart 75 - Real Gdp Growth 2021-2031
Chart 76 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 77 - Consumer Context for Savoury Snacks
Chart 78 - Population 2021-2031
Chart 79 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Sweet Biscuits, Snack Bars and Fruit Snacks in Paraguay

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sweet Biscuits, Snack Bars and Fruit Snacks Summary

INDUSTRY PERFORMANCE

Local Innovation and Reduced Contraband Support Growth
Local Manufacturers Strengthen Their Position through Targeted Innovation
Chart 80 - Indel Relaunches Wafer Portfolio
Home-Made Desserts and Value Seeking Influence Purchasing Behaviour
Chart 81 - Value Sales 2021-2031
Chart 82 - Volume Sales 2021-2031
Chart 83 - Value Sales by Category 2026

WHAT'S NEXT?

Marketing Investment and Currency Shifts to Expand Consumption Opportunities
Health and Functional Innovation Set to Create New Growth Opportunities
Demographic Resilience and Higher Household Spending Expected to Support Long-Term Demand
Chart 84 - Forecast Value Sales 2021-2031
Chart 85 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Indel Narrows the Gap with Ancla as Innovation Reshapes Competition
Chart 86 - Company Shares 2026
Chart 87 - Brand Shares 2026

CHANNELS

Small Local Grocers Retain Dominance Despite Modern Retail Expansion
E-Commerce Expands through Convenience and Assortment
Chart 88 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 89 - Economic Context for Sweet Biscuits, Snack Bars and Fruit Snacks
Chart 90 - Real Gdp Growth 2021-2031
Chart 91 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 92 - Consumer Context for Sweet Biscuits, Snack Bars and Fruit Snacks
Chart 93 - Population 2021-2031
Chart 94 - Population by Generation 2026

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/snacks-in-paraguay/report.