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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

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Traditional grocers retain dominance amid narrowed price gaps

End of price controls reshapes channel dynamics

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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  
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### [Breakfast Cereals in Argentina](#)

## KEY DATA FINDINGS

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## 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

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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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Processed Meat, Seafood and Alternatives To Meat in Argentina

## 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

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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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