



Staple Foods in Paraguay

February 2026

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EXECUTIVE SUMMARY

Growth of staple foods thanks to a reduction in smuggling and economic growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Reduced smuggling from Argentina boosts sales of staples in Paraguay

The government encourages consumers seeking health benefits through labelling law

Local companies maintain their dominance in staples in Paraguay to the detriment of multinationals

WHAT'S NEXT?

Positive forecast period growth of staples thanks to improving economic situation

The political and economic climate in Argentina continues to have a bearing on the performance of staples in Paraguay

Sales of staple foods via retail e-commerce and convenience stores develop from a low base

COMPETITIVE LANDSCAPE

After the outstanding strength of artisanal, AJ Vierci group is the leading player

Nestlé recovers from supply issues in 2024 and records strong growth in 2025

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Packaged leavened bread continues to grow in popularity

Industry Performance

Bread remains a popular category in baked goods

Cakes and pastries are popular in Paraguay with cakes consumed as an indulgent treat and pastries at breakfast or as a snack

What's Next?

Promisorry outlook for packaged baked goods

Casa Rica offers a wide variety of healthy baked goods

Significant investment in a new baked goods eco-friendly production plant boosts local production and alters the competitive landscape

Competitive Landscape

Artisanal maintains a strong lead while the growing popularity of packaged leavened bread boost Bimbo's performance

Bimbo Paraguay SA registers the fastest growth

Channels

Small local grocers have an important role in the distribution of baked goods in Paraguay

Retail e-commerce records the strongest growth while small local grocers benefit from a significant reduction in smuggling

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Breakfast cereals is further segmented between children and adults as well as those seeking healthier products

What's Next?

Forecast period growth of breakfast cereals despite growing concerns related to children's breakfast cereals

Muesli and granola grow in popularity thanks to their healthier ingredients

New innovations include healthier ingredients and a lower sugar content in children's breakfast cereals

Competitive Landscape

Profarco, which represents the Kellogg's brand retains its outright lead

Nestlé outperforms all the other players in breakfast cereals

Channels

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Key Data Findings

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Industry Performance

Interest in processed meat, seafood and alternatives to meat is strong due to the cultural importance of meat in Paraguay

The popularity of canned tuna bolsters sales of processed seafood

What's Next?

Strong forecast period demand stems from increasing disposable incomes

Chicken is perceived as a healthier alternative to beef and pork

Limited impact of the labelling law in the largest categories

Competitive Landscape

Novex SA is the leading player in processed meat, seafood and alternatives to meat

Granja Avícola La Blanca SA achieves the strongest growth thanks to the growing popularity of frozen poultry

Channels

Supermarkets have a more developed infrastructure for the safe storage and retail of processed meat, seafood and alternatives to meat

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Industry Performance

Frozen processed fruit and vegetables are popular for varieties not available in the country or which are out of season

Shelf stable fruit and vegetables remain the most popular as these products do not require cold storage

What's Next?

Forecast period growth tied to multi-factor drivers

Increased awareness of the attributes of frozen vegetables has a positive impact

Modernisation of retailers helps boost sales of frozen processed fruit and vegetables

Competitive Landscape

High atomisation in processed fruit and vegetables with Arcorpar SA ahead of the pack

After Arcorpar, McCain Foods experiences strong growth

Channels

Small local grocers remains by far the strongest channel for processed fruit and vegetables

Strong growth of retail e-commerce, from a low base, as the channel is hampered by a lack of infrastructure

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Key Data Findings

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Solid performance of rice, pasta and noodles

Industry performance

Rice and pasta remain popular as they are common sources of carbohydrates in the country

Noodles provide a quick and convenient snack

What's Next?

Forecast period growth for rice, pasta and noodles sales

Integral grain alternatives gather momentum

More premium products are launched in response to increasing demand from the growing middle-class

Competitive Landscape

AJ Vierci is the outright leading player in rice, pasta and noodles

Cereales SA benefits from its popularity in dried pasta

CHANNELS

Supermarkets leads in the distribution of rice, pasta and noodles, followed by small local grocers

Retail e-commerce and convenience stores grow from a low base

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