Euromonitor International

Processed Meat, Seafood and Alternatives to Meat in Paraguay

November 2026

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Growing middle class and rising disposable incomes lift volume sales
Chilled processed red meat leads as quality perception drives preferences
Urban busy lifestyles in Asuncion accelerate convenience-driven purchases
Chart 1 Value Sales 2021-2031
Chart 2 Volume Sales 2021-2031
Chart 3 Value Sales by Category 2026

WHAT'S NEXT?

Processed meat drives volume growth as rising incomes lift consumption
Frozen poultry gains traction while Dinavisa postpones front-of-pack labelling law
Companies avoid duplicate packaging investments while targeting convenience-seeking urban households
Chart 1 Forecast Value Sales 2021-2031
Chart 2 Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Frigorifico Guarani regains share lead while Novex and Franz see slight declines
Vertical integration and brand recall sustain leaders amid fragmented competition
Chart 1 Company Shares 2026
Chart 2 Brand Shares 2026

CHANNELS

Supermarkets lead as modern grocery retailers capture processed meat demand
Warehouse clubs expand beyond Asuncion driving frozen processed meat growth
Retail e-commerce remains limited despite infrastructure improvements in Asuncion
Chart 1 Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 1 Real GDP Growth 2021-2031
Chart 2 Inflation 2021-2031

CONSUMER CONTEXT

Chart 1 Population 2021-2031
Chart 2 Population by Generation 2026
Chart 3 Consumer Expenditure 2021-2031

COUNTRY REPORTS DISCLAIMER

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-paraguay/report.