



Processed Fruit and Vegetables in Argentina

November 2025

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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

CHANNELS

Modern trade remains the core route to market, especially critical for frozen infrastructure and assortment
Hypermarkets underperform in 2024-2025 but are set to regain momentum as pricing rebalances and promotions scale

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Staple Foods in Argentina - Industry Overview

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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