



Euromonitor
International

Staple Foods in Argentina

November 2025

Table of Contents

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

CHANNELS

Traditional grocers retain dominance amid narrowed price gaps

End of price controls reshapes channel dynamics

Wholesalers attract household shoppers through flexible formats

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Argentina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic stabilisation supports a cautious recovery in baked goods

INDUSTRY PERFORMANCE

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
Private label benefits from affordability and changing purchasing habits

CHANNELS

Bakeries and small grocers remain key distribution points
Modern retail channels face adjustment after end of price controls

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Argentina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic stabilisation supports only a mild rebound in breakfast cereals

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
Private label strengthens as Kellanova loses ground amid brand withdrawal

CHANNELS

Supermarkets and hypermarkets dominate cereal distribution
Hypermarkets face temporary slowdown but expected to recover over the forecast period

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Argentina

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

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

Modern trade dominates distribution, especially for frozen where infrastructure matters most

Hypermarkets underperformed in 2024-2025 but are poised to recover as pricing rebalances

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025
Table 69 - NBO Company Shares of Rice: % Value 2021-2025
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025
Table 76 - Distribution of Rice by Format: % Value 2020-2025
Table 77 - Distribution of Pasta by Format: % Value 2020-2025
Table 78 - Distribution of Noodles by Format: % Value 2020-2025
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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/staple-foods-in-argentina/report.