



Processed Meat, Seafood and Alternatives To Meat in Argentina

November 2025

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

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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

MARKET DATA

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