



Dairy Packaging in Argentina

August 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining dairy packaging volumes due to economic instability and challenges from the weather
Nestlé advances sustainability goals with Coffee mate launch in recyclable pouches
Flexible plastic and thin wall plastic dominate due to affordability, but lose share to more sustainable solutions

PROSPECTS AND OPPORTUNITIES

Dairy packaging volumes set to rise amidst improved weather, supportive policies, and farm profitability
Arcor/Danone’s pursuit of Mastellone signals potential shift in dairy packaging

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EXECUTIVE SUMMARY

Packaging in 2024: The big picture
2024 key trends
Shaped liquid cartons gain share in dairy due to their perceived sustainability and alignment with consumer values
Rigid plastic continues to dominate soft drinks packaging but metal beverage cans double their share
Glass bottles continue to dominate alcoholic drinks packaging but metal beverage cans are gaining ground
Inflation drives shift towards lightweight and polarised pack sizes
HDPE bottles remain popular but are losing ground as refill pack types gain traction in home care
Flexible packaging dominates pet food as metal cans continue lose share

PACKAGING LEGISLATION

New regulations redefine “excessive” nutrients and advertising limits
New regulations standardise labelling for plant-based food
Warning labels influence purchasing decisions under Argentina’s FOPL law

RECYCLING AND THE ENVIRONMENT

Soft drinks packaging embraces sustainability with increased use of rPET in 2024
Sustainability pressures driving decline in flexible aluminium/plastic
Beauty and personal care packaging shifts towards sustainability
Table 1 - Overview of Packaging Recycling and Recovery in Argentina: 2022/2023 and Targets for 2024

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