



Rice, Pasta and Noodles in Argentina

November 2025

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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

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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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