



Cooking Ingredients and Meals in Paraguay

November 2025

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EXECUTIVE SUMMARY

Economic growth and reduction in smuggling benefit sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Reduced smuggling from Argentina in 2024 and 2025 bolsters local sales of cooking ingredients and meals

The government seeks to promote health through the establishment of a new Packaged Food Warning Front Labelling law

Small local grocers remains the leading channel but is being increasingly challenged by supermarkets and warehouse clubs

WHAT'S NEXT?

Growth of cooking and ingredients and meals over the forecast period

Economic policies in Argentina have a direct bearing on cooking ingredients and meals in Paraguay over the forecast period

Growth in retail e-commerce and convenience stores as increasingly hectic lifestyles stimulate consumer demand for convenience

COMPETITIVE LANDSCAPE

Casa Modiga SA remains the leading player thanks to the popularity of its Natura brand in edible oils

BRF SA with its Sadia brand, present in meals and soups, registers the strongest growth in 2025

CHANNELS

Small local grocers remains the strongest channel for cooking ingredients and meals

Small local grocers registers the strongest growth in cooking ingredients and meals

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Edible oils is able to capitalise on growth in 2025

Sunflower oil remains the most popular edible oil in Paraguay

WHAT'S NEXT?

Growth of edible oils over the forecast period

In addition to rising incomes, the healthier attributes of olive oil attract new consumers

Little potential for innovation although supply is guaranteed

COMPETITIVE LANDSCAPE

Casa Modiga SA leads in edible oils with its highly popular Natura brand

Ramírez Díaz de Espada experiences the strongest growth thanks to the versatility of its Cocinero brand

CHANNELS

Small local grocers accounts for the bulk of edible oils sales

Retail e-commerce records the strongest growth from a low base, but small local grocers benefits the most from a significant decline in smuggling

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2025 DEVELOPMENTS

Wide range of products available but consumer base remains confined to affluent urban consumers

INDUSTRY PERFORMANCE

Dry soup is popular among those seeking a quick meal solution or for use in the preparation of home-made soup

With the exception of frozen pizza, ready meals remain unpopular

WHAT'S NEXT?

Frozen pizza and frozen ready meals drive overall category growth over the forecast period

Unhealthy perception negatively impacts dry soups and dried ready meals

Good prospects for frozen versions of local food

COMPETITIVE LANDSCAPE

Unilever remains the leading player thanks to the popularity of its Knorr brand

Montana is by far the most dynamic company in 2025 thanks to the popularity of its Sadia brand

CHANNELS

Due to the growing popularity of frozen food, supermarkets enjoy higher penetration

Retail e-commerce and small local grocers register the strongest growth in 2025

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Key Data Findings

2025 DEVELOPMENTS

Urban and affluent consumers drive sales

INDUSTRY PERFORMANCE

Positive economic growth and reduced smuggling boost the popularity of sauces, dips and condiments, especially cooking and table sauces
The popularity of pasta sauces rises due to time pressures among urban professionals

WHAT'S NEXT?

Positive growth of sauces, dips and condiments over the forecast period
Stock cubes impacted by its high-sodium content
Growth opportunity for chili sauces based on increasing interest in spicy flavours

COMPETITIVE LANDSCAPE

Unilever del Paraguay maintains its lead through the popularity of its leading brands, including Hellmann's
Norte by Grupo AJ Vierci SA is the most dynamic player in 2025, while Unilever also performs well

CHANNELS

Small local grocers accounts for the largest share of sales of sauces, dips, and condiments
Retail e-commerce is the most dynamic channel in sauces, dips and condiments in 2025, though sales remain negligible
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Key Data Findings

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Modest growth of sweet spreads in 2025
Guava remains the most popular flavour in jams and preserves

WHAT'S NEXT?

Macroeconomic and external drivers stimulate category growth
Despite pursuing healthier habits, the indulgence attribute remains strong in sweet spreads
The category benefits from the entry of more new premium products

COMPETITIVE LANDSCAPE

Fruit & Foods SA with its Sabores de Areguá brand leads in sweet spreads
Dul-Cesar Industrial & Comercial SA is the most dynamic player in 2025

CHANNELS

Small local grocers remains the strongest channel for sweet spreads in 2025

Small local grocers outperforms supermarkets

Category Data

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