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Buenos Aires



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# Food Processing Industry

March 2022

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# 01/ Overview

## // OVERVIEW

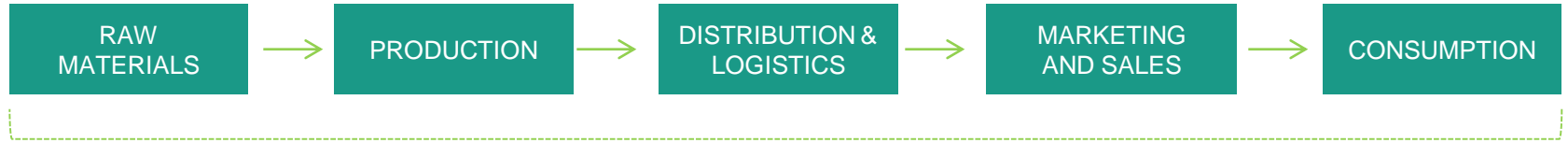
- Argentina occupies a very prominent position as a supplier of food and raw materials within the agriculture, livestock, and dairy products market worldwide.
- 40.1% of Argentina's exports during the 2021 period were products from agricultural origin.
- In recent years, Argentine consumers have shown increasing interest in exploring newer cuisines.
- The segments of dietary supplements and organic food ingredients are continuously expanding.
- Argentina has an industrial structure with extensive experience and diversification in the production of high-quality and value-added food & beverages.

## // PROCESSED FOOD CONCEPT

In 2010, the World Health Organization (WHO) defined Nutritional Profiling Systems (NPS) as “the science of classifying or categorizing foods according to their nutritional composition for reasons related to disease prevention or promotion of Health”. These systems are useful, for example, when labeling food or establishing regulations for its commercialization.

**An NPS has not yet been adopted in Argentina.**

# // VALUE CHAIN STRUCTURE





# // MARKET SIZE 2021

**40.1%**

of Argentina's exports correspond to manufactures of agricultural origin

**3,139,108**

employees of agribusiness chains

**3rd**

world producer of soybeans and sunflower seeds

**4th**

world producer of corn and lemons

**5th**

world producer of beef

**25.3%**

Of the total employment in the country

Source: INDEC.

**2021**

**EXPORTS**  
USD 30.95 billion (\*)

**IMPORTS**  
USD 3.03 billion (\*\*)

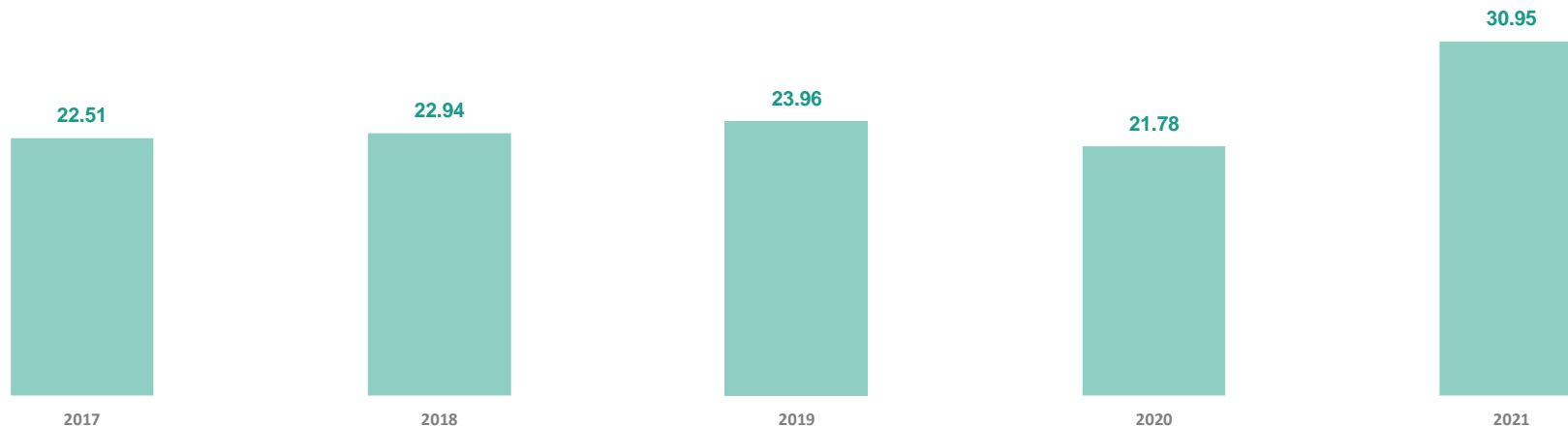
**EXPORTS**  
USD 16.86 billion (\*\*\*)

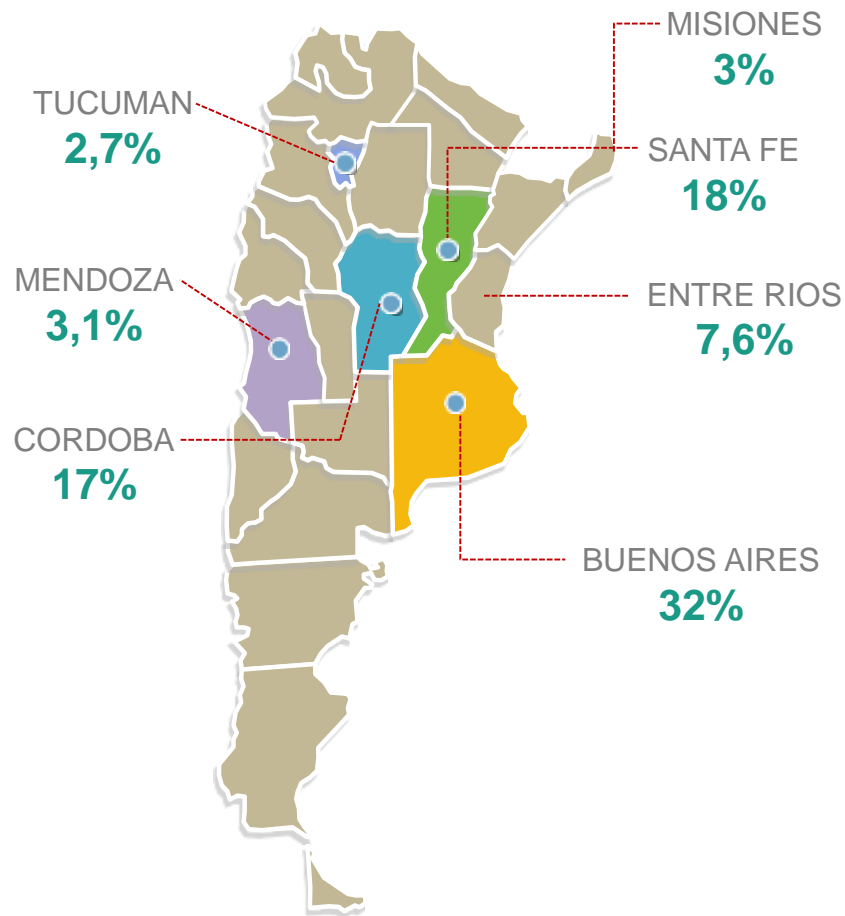
**IMPORTS**  
USD 1.52 billion (\*\*\*)

Source: (\*): Manufactures of agricultural origin (MOA). (\*\* y \*\*\*): Food and beverages. (\*\*\*): basic food and beverages for the industry. 2021.

# // DEVELOPMENT OF THE FOOD & BEVERAGE EXPORTS VALUE

Value in USD billion





## GEOGRAPHICAL DISTRIBUTION OF NATIONAL PRODUCTION

The agri-food production chain is present in all 24 provinces in Argentina.

However, 7 provinces account for 83.4% of total production.



# 02/ Main Competitors

# // MAIN FOOD COMPANIES IN ARGENTINA

Argentina has an important business structure in the food and beverage processing industries. The portfolio includes local and international companies with significant experience in the sector as well as in exports of food & beverage products.

PREPARATION OF OTHER FOOD PRODUCTS (BAKED GOODS, SWEETS, PASTA, AND OTHERS)				
Companies	2020	2019	2018	2017
	In USD million			
ARCOR S.A.I.C.	874	1,045	2,326	2,631
Molinos Río de la Plata	481	668	848	631
Mondelez International	351	443	391	655
Bagley Argentina	349	439	461	600
Niza	269	339	93	-
Ledesma	267	365	268	580
Ingredion Argentina	169	205	161	163
Mc Cain Argentina	146	184	141	109
Grupo Bimbo	145	182	185	-

MANUFACTURE OF FOOD PRODUCTS FROM THE MILLING INDUSTRY				
Companies	2020	2019	2018	2017
	In USD million			
Molinos Cañuelas	863	982	1,198	1,510
Molino Agro	135	179	845	891
Saf Argentina	55	40	49	55
Molinos Fénix	21	25	---	---
Marcos Schmukler	18	26	---	---

## Main food companies in ARG:

ARCOR, Molinos Cañuelas, Cervecería y Maltería Quilmes, Mastellone Hermanos, JBS Argentina.

### PREPARATION OF OTHER ALCOHOLIC AND NON-ALCOHOLIC BEVERAGES

Companies	2020	2019	2018	2017
	In USD million			
Cervecería y Maltería Quilmes	1,321	1,241	1,567	1,782
Embotelladora del Atlántico	592	600	593	781
Compañía Industrial Cervecera	468	568	549	535
Serv. y Produc. para Bebidas Refres. (Ex Coca Cola Arg.)	328	332	358	468
Salta Refrescos	308	312	372	513
Coca Cola Femsa	276	376	392	547
Pepsico de Argentina	202	199	230	339
Fratelli Branca Destilerías	136	137	163	247
Agua Danone	131	132	186	291
Cepas Argentinas	86	87	90	139

### MANUFACTURE OF DAIRY PRODUCTS

Companies	2020	2019	2018	2017
	In USD million			
Mastellone Hnos.	964	1,003	851	1,204
Molfino Hermanos	748	677	364	312
Nestlé Argentina	492	465	480	646
Danone Argentina	401	412	550	790
Milkaut	192	156	137	202
SanCor	131	135	194	667
Manfrey Coop. de Tamberos	101	128	90	111
Mastellone San Luis	89	129	93	173
Nutricia Bagó	81	83	83	109
Kasdorf	73	75	79	122

### MEAT PROCESSING (INCLUDING FISH)

Companies	2020	2019	2018	2017
	In USD million			
JBS Argentina	314	362	355	467
Friar	272	---	---	---
Quickfood	197	227	265	320
Offal Exp	124	---	---	---
Black Bamboo	118	122	---	---



# 03/ Public Policies and Trade Agreements

# // PUBLIC POLICIES

Due to the relevance of the agri-food sector in the Argentine economy, the set of policies, laws, and regulations associated with the sector are complex and broad.

The Ministry of Agriculture, Livestock, and Fisheries and the Ministry of Productive Development are the key institutions for the implementation of the laws and policies of the sector.

The main laws, programs, and public policies of interest to the international investor are listed in the next slides.

Regulation	Description
Law 26,697. Argentine Food. A Natural Choice	By-Law No. 26,967 of 2014, the Seal “ALIMENTOS ARGENTINOS UNA ELECCIÓN NATURAL”, and its English version “ARGENTINE FOOD A NATURAL CHOICE” was created within the scope of the SECRETARIAT OF AGRICULTURE, LIVESTOCK AND FISHERIES under the MINISTRY OF AGRICULTURE, LIVESTOCK AND FISHERIES.
Strategic Plan for the Organic Production Sector of Argentina 2030	The Ministry of Agriculture, Livestock and Fisheries prepared a Strategic Plan for the Organic Production Sector of Argentina by 2030.
Law 25,127 on ecological, biological or organic production of agricultural and agro-industrial systems	Law 25,127 of 1999 on ecological, biological or organic production of agricultural and agro-industrial systems. The norm regulates the ecological, biological or organic production of all agricultural and agro-industrial production systems. Their collection, capture and hunting systems. The Advisory Commission for Organic Production is also created within the scope of the Ministry of Agriculture, Livestock, Fisheries and Food.
Export Reimbursement System for differentiated foods	Export Reimbursement System for differentiated foods, granted by the Ministry of Agriculture, Livestock and Fisheries.



# // PUBLIC POLICIES

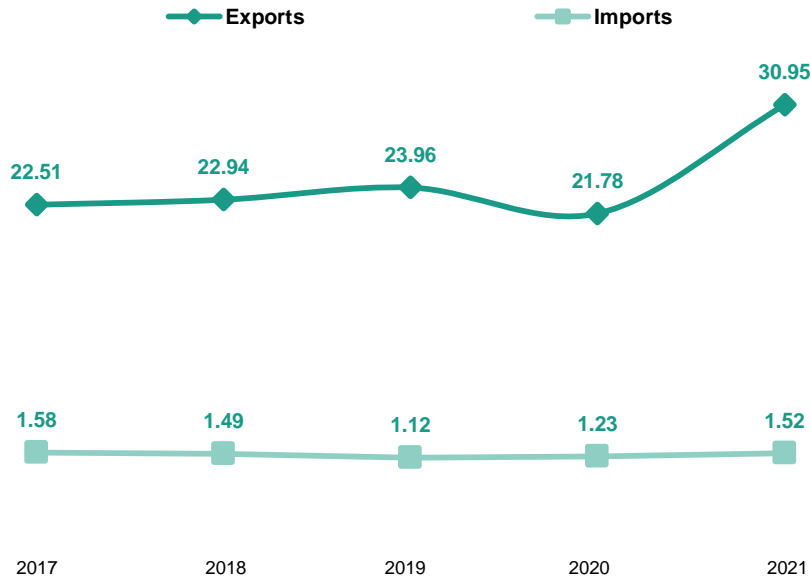
Regulation	Description
National food control system	At national level, two organizations carry out food control: SENASA and INAL. Complementarily, the Health Ministry of each province is in charge of food control, by themselves or through a particular entity created for this purpose. The provinces exercise control within their jurisdiction. INAL's participation is associated with the control of imported and exported products, as long as they are processed products ready for consumption. Products that are not processed are regulated by SENASA
SENASA	The National Service for Agrifood Health and Quality (SENASA) is a state health agency created in 1996 for the inspection and certification of products and by-products of animal and plant origin, their inputs and agrochemical residues, as well as prevention, eradication, and control of animal diseases, including those transmissible to humans, and of plant pests that affect the country's agricultural production. More information at: <a href="https://www.argentina.gob.ar/senasa">https://www.argentina.gob.ar/senasa</a> .
INAL	The National Institute of Food (INAL) operates within the scope of the National Administration of Drugs, Food and Medical Technology (ANMAT), dependent on the Ministry of Health. More information at: <a href="https://www.argentina.gob.ar/anmat">https://www.argentina.gob.ar/anmat</a> .
CONAL	The National Food Commission (CONAL) is a technical body in charge of advising, supporting and monitoring the National Food Control System, established by Decree 815 of 1999. More information at: <a href="http://www.conal.gob.ar/">http://www.conal.gob.ar/</a> .
National Plan for the Reduction of Food Losses and Waste	Through Decree 246/2019 the National Plan for the Reduction of Food Losses and Waste was regulated, and the former State Secretariat for Agroindustry, current Ministry of Agriculture, Livestock and Fisheries, was designated as the authority for the application of the program and has reinforced the efforts to apply the food donation law, known as the Donal Law, by the Ministry of Health and Social Development.
MERCOSUR	MERCOSUR Common Market Group Standards. These are the standards issued by the Common Market Group, and once internalized, it becomes part of the Argentine positive law. They respond internationally to the guidelines set by Codex Alimentarius. Regional standards are not directly applicable in Argentina, regulatory activity is completed when member states incorporate them into their food regulations through the competent bodies. More information at: <a href="http://www.alimentosargentinos.gob.ar/HomeAlimentos/Legislacion%20Alimentaria/ MERCOSUR.php">http://www.alimentosargentinos.gob.ar/HomeAlimentos/Legislacion%20Alimentaria/ MERCOSUR.php</a>



# 04/ International Trade

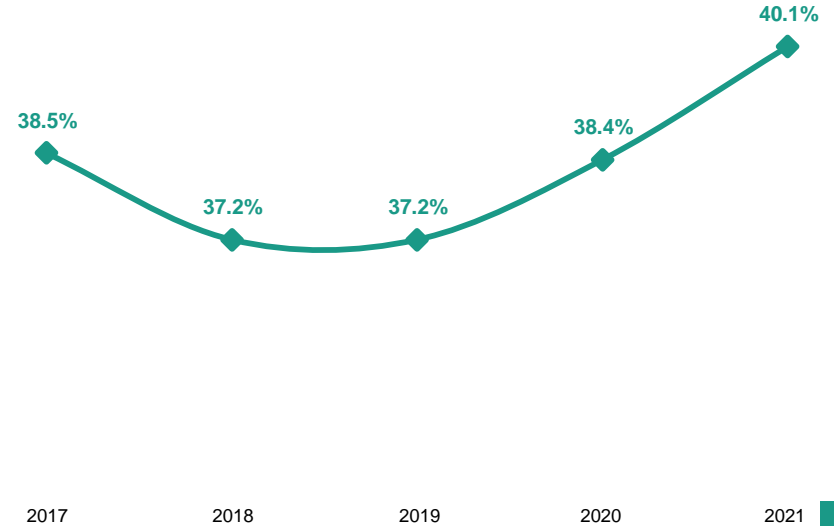
# // ARGENTINE EXPORTS AND IMPORTS

(MOA) Value in USD billion



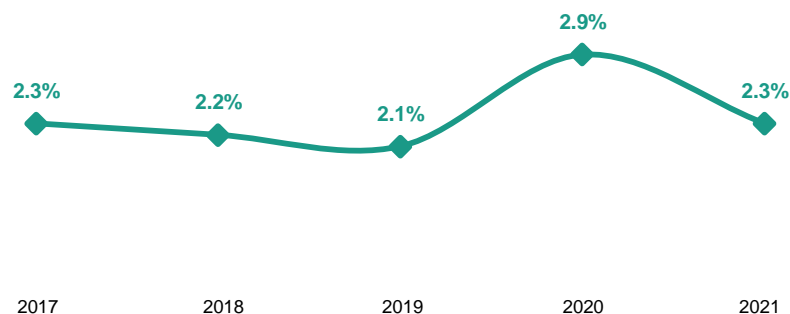
# // AGRICULTURAL MANUFACTURING EXPORTS (MOA) OVER NATIONAL TOTAL EXPORTS

(MOA)



Source: INDEC 2021.

## // FOOD & BEVERAGES IMPORTS OUT OF TOTAL NATIONAL IMPORTS

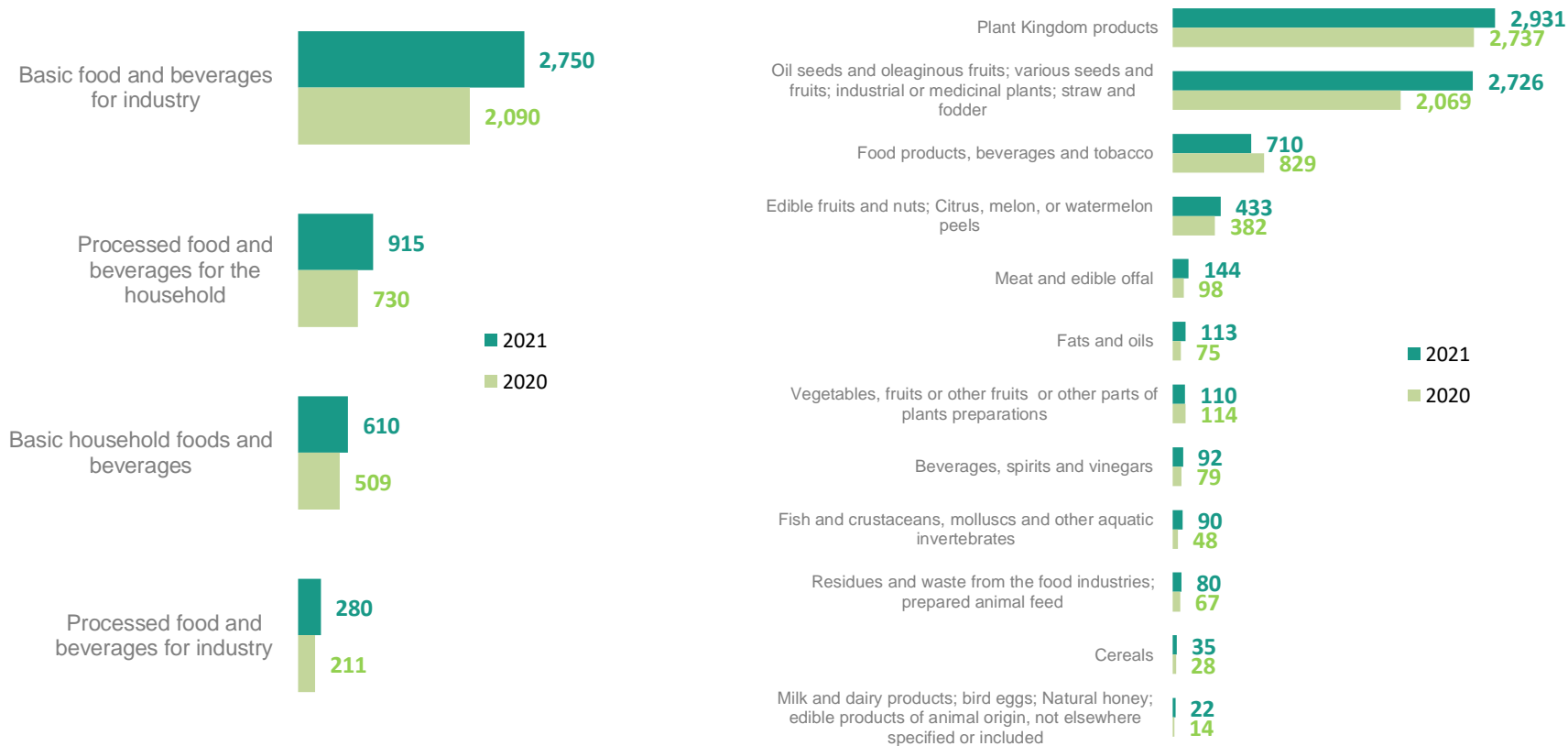


Source: INDEC 2021

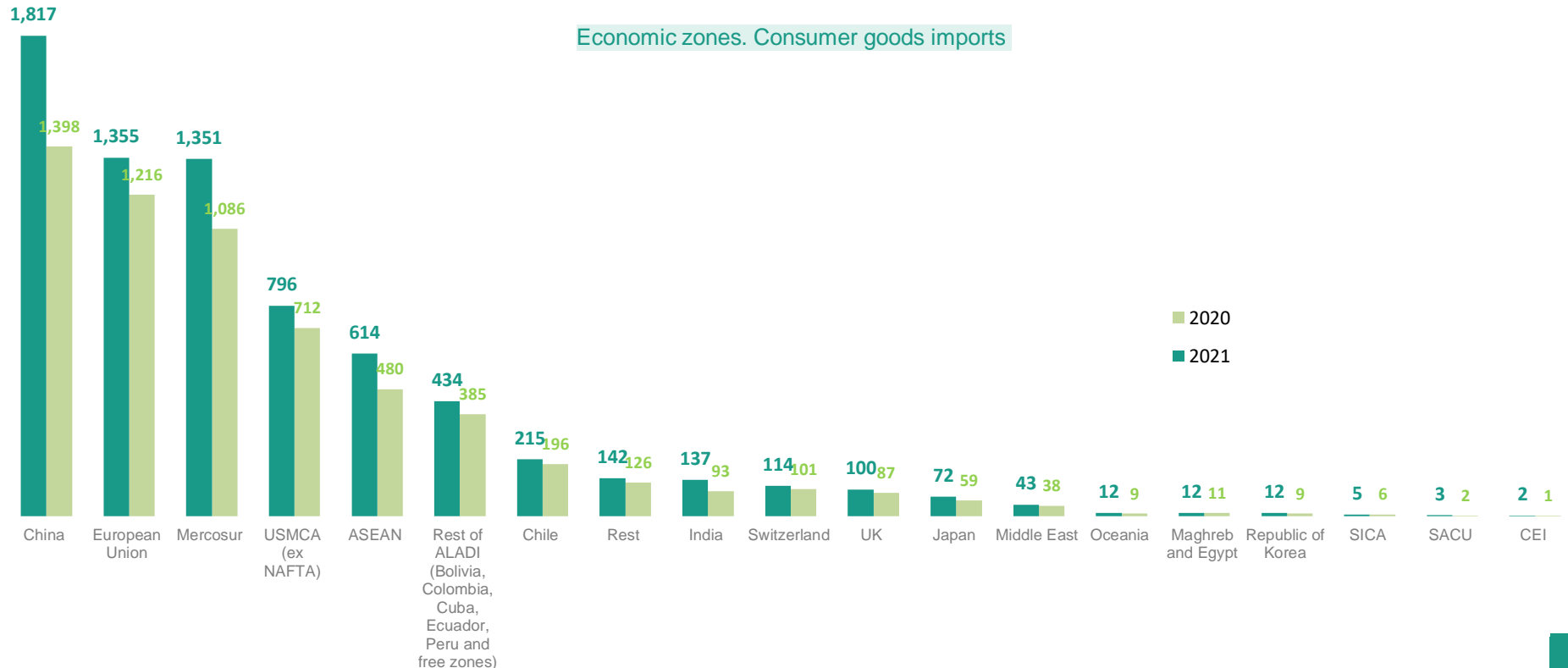
## // AGRICULTURAL MANUFACTURING EXPORTS (MOA)

Product	2021	2020	2019
	In USD million		
Residues and waste from the food industry	11,876	5,698	6,387
Fats and oils	8,134	3,198	3,280
Meats and their preparations	3,188	2,226	2,268
Dairy products	1,026	572	405
Beverages, spirits and vinegar	890	555	573
Milling products and their preparations	785	448	509
Vegetable, legume and fruit preparations	712	478	715
Rest of MOA	441	251	266
Hides and skins	404	221	404
Sugar, cocoa and confectionery	265	131	163
Tanning and dyeing extracts	243	125	164
Processed fish and shellfish	221	141	197
Coffee, tea, yerba mate and spices	146	109	122
Dried or processed fruits	120	62	82
Elaborate wool	114	52	124
Other products of animal origin	62	44	49

# // READY-TO-EAT PACKAGED FOODS IMPORTS (USD Mn)



# // READY-TO-EAT PACKAGED FOODS IMPORTS (USD Mn)



Source: INDEC 2021. In USD million.



# 05/ Useful Information

# // USEFUL INFORMATION

<p>NATIONAL INSTITUTE OF STATISTICS AND CENSUS (INDEC)</p>	<p>Address: Av. Pres. Julio A. Roca 609 City of Buenos Aires Postal Code: C1067 Phone: (+54 11) 4349-9200 - Website: <a href="https://www.indec.gob.ar/">https://www.indec.gob.ar/</a></p>	<p>MINISTRY OF ECONOMY</p>	<p>Address: Av. Hipólito Yrigoyen 250 City of Buenos Aires Postal Code: C1085 AAB Phone: (+54 11) 4349-5000 Website: <a href="https://www.argentina.gob.ar/economia">https://www.argentina.gob.ar/economia</a></p>
<p>MINISTRY OF FOREIGN AFFAIRS, INTERNATIONAL TRADE AND WORKSHIP</p>	<p>Address: Esmeralda 1216 City of Buenos Aires Postal Code: C1007 ABR Phone: (+54 11) 4819-7000 - Website: <a href="https://www.cancilleria.gob.ar/">https://www.cancilleria.gob.ar/</a></p>	<p>CHAMBER OF FOOD PRODUCTS INDUSTRIALS (CIPA)</p>	<p>Address: Av. Córdoba 1345 - 9 A Floor City of Buenos Aires Postal Code: 1055 Phone: (+54 11) 4814-4020 - Website: <a href="http://www.cipa.org.ar/">http://www.cipa.org.ar/</a></p>
<p>MINISTRY OF PRODUCTIVE DEVELOPMENT</p>	<p>Address: Av. Hipólito Yrigoyen 250 City of Buenos Aires Postal Code: C1086 Phone: (+54 11) 0800-333-7963 - Website: <a href="https://www.argentina.gob.ar/produccion">https://www.argentina.gob.ar/produccion</a></p>	<p>COORDINATOR OF THE FOOD PRODUCTS INDUSTRIES (COPAL)</p>	<p>Address: 25 de Mayo 516 – 5 y 6 Floor City of Buenos Aires Postal Code: C1002ABL Phone: (+54 11) 4311-3006 - Website: <a href="https://copal.org.ar/">https://copal.org.ar/</a></p>
<p>MINISTRY OF AGRICULTURE, LIVESTOCK AND FISHERIES</p>	<p>Address: Av. Paseo Colón 982 City of Buenos Aires Postal Code: C1063ACW Phone: (+54 11) 4349-2000 Website: <a href="https://www.argentina.gob.ar/agricultura">https://www.argentina.gob.ar/agricultura</a></p>	<p>ARGENTINE CHAMBER OF COMMERCE AND SERVICES (CAC)</p>	<p>Address: Av. L. N. Alem 36 City of Buenos Aires Postal Code: C1003AAN Phone: (+54 11) 5300-9000 - Website: <a href="https://www.cac.com.ar/">https://www.cac.com.ar/</a></p>



## // USEFUL INFORMATION

Main organic product stores in Argentina

Products: natural cosmetics, species. dry fruits, condiments, jams, nutraceuticals, products for gluten intolerants and diabetics

CHAMBER OF MANUFACTURERS OF DIETETIC FOODS AND RELATED PRODUCTS  
(CAFADYA)

Address: Av. Córdoba 1345 – 9<sup>th</sup> floor - City of Buenos Aires  
Postal Code: C1086AAV  
Phone: (+54 11) 4814-1230 /4020 - Website:  
<http://www.cafadya.org/index.php/es/>

NEW GARDEN

Address: Volta 3035 – Tortuguitas, Buenos Aires  
Postal Code: B1667DIG  
Phone: (+54 11) 4812-7732 - Website: <https://newgarden.com.ar/>,  
<http://www.alimentosvillares.com.ar>

GRANDIET

Address: Pasaje Ballerini 1159 – City of Cordoba capital  
Postal Code: X5003HOA  
Phone: (+54 351) 489-4190 - Website: <https://www.grandiet.com/>

DIETÉTICAS TOMY

Address: Rivadavia 333 – San Isidro, Buenos Aires  
Postal Code: B1642CEG - Phone: (+54 11) 4719-7600  
Website: [www.dieteticastomy.com.ar](http://www.dieteticastomy.com.ar)

VITALCER

Address: Julio A. Roca 4250 – Florida, Buenos Aires  
Postal Code: B1604  
Website: [www.vitalcer.com](http://www.vitalcer.com)



# 06/ Conclusion

## // CONCLUSION

- **Argentina occupies an important position as a supplier of food and raw materials in respect of agriculture, livestock, and dairy products worldwide.**
- **It has an industrial structure with extensive experience and diversification in the production of high-quality and value-added food & beverages. Its food processing sector has multiple export opportunities to more than 50 countries around the world. These factors could be attractive to Indian companies interested in exploring joint ventures in Argentina.**
- **The continuously expanding segments of packaged foods (including ready-to-eat varieties), dietary supplements (including Ayurvedic supplements), and organic food ingredients offer important opportunities worth exploring for Indian exports.**
- **Significant opportunities exist in potential tie-ups in the production of natural and frozen foods, derived from meat and natural beverages.**
- **India offers business opportunities in plant-based meat substitute products, allowing work on different targets: flexitarian and vegetarians, young consumer base, middle class and urban consumer.**



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