Baby Food

January 2012

نمونه گزارش تحلیل بازار غذای کودک در ایران

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BABY FOOD IN ARGENTINA - CATEGORY ANALYSIS

HEADLINES

- Baby food grows by 36% in current retail value terms to be worth Peso928 million in 2011
- Mead Johnson SA, Nestlé Argentina SA, Nutricia-Bagó SA and SanCor Cooperativas Unidas Ltda establish the Asociación de Empresas de Nutrición Infantil (Child Nutrition Company Association)
- Prepared baby food records the strongest current retail value growth, of 78%, in baby food in 2011, to be worth Peso120 million
- Average unit prices in baby food increase by 22% in current retail value terms in 2011
- Nestlé Argentina SA leads in baby food, with a 40% retail value share in 2010
- Baby food expected to grow by a constant retail value CAGR of 10% over the forecast period

TRENDS

- In July 2011, Mead Johnson SA, Nestlé Argentina SA, Nutricia-Bagó SA and SanCor Cooperativas Unidas Ltda founded the Asociación de Empresas de Nutrición Infantil (Child Nutrition Company Association) with the aim of promoting adequate child nutrition during the first stages of life. The association's first activity was the launch of its webpage, www.nutricioninfantil.com.ar, which features medical advice, videos and information for the family about the importance of breastfeeding, about child anaemia and about the correct definition of nutrition and hygiene during food preparation, among other topics.
- The 2010 census revealed that the population in Argentina was 40,117,096 people, 20,593,330 of which were female and 19,523,766 were male. According to trade sources, during the inter-census period of 2001to 2010, there was growth of 11% in the population, which was similar to growth recorded from 1991to 2001. In 2009, there were 691,200 births in Argentina and the birth rate was 17%. The fertility rate was 2% and the rate of population growth was 10%.
- Consumer perceptions of mi k formula remained unfavourable at the end of the review period, as most mothers prefer to breastfeed their babies. However, due to increasingly hectic lifestyles and related changes in eating habits it has become harder for many Argentinean women to produce breast milk to feed their children and therefore they have been obliged to switch to milk formula. In Buenos Aires, there is legislation to promote, protect and support exclusive breastfeeding until babies are six months old and to promote, where possible, continued breastfeeding until a child is one year old, with the addition of supplementary food. The legislation includes a ban on advertising of milk formula and on the distribution of free product samples. It also obliges manufacturers of milk formula to include a notice indicating the superiority of breast milk over milk formula inside product packaging.
- Baby food grew by 23% in constant retail value terms in 2011, which was slightly higher than the constant retail value CAGR over the review period due to the increasingly hectic lifestyles of working mothers, as a result of which their eating habits have changed, making it harder for many of them to produce breast milk. This in turn has prompted a switch to milk formula among these mothers.

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- Prepared baby food recorded the strongest current retail value growth, of 78%, in baby food in 2011 due to the continued positive effect of the entrance of Nutr baby SA and Nutricia-Bagó SA, and their respective Nutribaby and Vital Infatil Frutapura brands, in prepared baby food in 2009.
- Average unit prices in baby food increased by 22% in current retail value terms in 2011 as a consequence of increases in the cost of labour and increased distr bution costs.
- Liquid mi k formula accounted for a retail value share of 34% of milk formula in 2011. Liquid milk formula is perceived as much more convenient than powder milk formula in terms of preparation. Moreover, there is less risk of babies falling ill from drinking unhealthy tap water even though the quality of tap water in Argentina is reasonable. In addition, the switch to liquid milk formula has been made possible by increases in the level of disposable income of consumers, which has enabled a greater number of mothers to make purchasing decisions based on health and convenience over price. There was no liquid special baby milk formula in Argentina in 2011.
- Special baby mi k formula in Argentina continued to comprise solely of powder special baby milk formula in 2011. Soy-based special baby milk formula accounted for a retail value share of 89% of special baby mi k formula in 2011. Soy-based products are mostly given to babies with lactose intolerance while allergy prevention plays a relatively minor role.
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COMPETITIVE LANDSCAPE

- Nestlé Argentina SA was the leading player in baby food in 2010 with a retail value share of 40% due mainly to its long-standing presence in the category through high equity brands such as Nestúm, Nan, Nidina, Nido and Gerber. Through its wide selection of brands, the company is present in all categories of baby food. It also has a wide-reaching distribution network. Nestlé Argentina SA also achieved the biggest increase in retail value share of baby food in 2010 due to its strong performance in dried baby food, its strong lead in dried baby food, toddler milk formula and prepared baby food and the fact that it maintained its retail value share in other categories of baby food.
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PROSPECTS

- The Asociación de Empresas de Nutrición Infantil (Child Nutrition Company Association) aspires to work together with national health authorities, medical societies and NGOs in order to design strategies to promote the quality of child nutrition in Argentina. Other companies in baby food are expected to join the association in the medium term.

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CATEGORY DATA

Table 1 Sales of Baby Food by Category: Volume 2006-2011

	2006	2007	2008	2009	2010	2011
Dried Baby Food (tonnes)						
Milk Formula (Not calculable)						
- Standard Milk Formula (Not calculable)						
- Follow-on Milk Formula (Not calculable)						
- Toddler Milk Formula (Not calculable)						
- Special Baby Milk Formula (Not calculable)						
Prepared Baby Food (tonnes)						
Other Baby Food (tonnes)						
Baby Food (Not calculable)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Baby Food by Category: Value 2006-2011

Peso million

	2006	2007	2008	2009	2010	2011
Dried Baby Food						
Milk Formula						
- Standard Milk Formula						
- Follow-on Milk Formula						
- Toddler Milk Formula						
- Special Baby Milk Formula						
Prepared Baby Food						
Other Baby Food						
Baby Food						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Baby Food by Category: % Volume Growth 2006-2011

	2010/11	2006-11 CAGR	2006/11 Total
Dried Baby Food (% volume growth)			
Milk Formula (Not calculable)			
- Standard Milk Formula (Not calculable)			
- Follow-on Milk Formula (Not calculable)			
- Toddler Milk Formula (Not calculable)			
- Special Baby Milk Formula (Not calculable)			

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Prepared Baby Food (% volume growth)	
Other Baby Food (% volume growth)	
Baby Food (Not calculable)	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Baby Food by Category: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Dried Baby Food			
Milk Formula			
- Standard Milk Formula			
- Follow-on Milk Formula			
- Toddler Milk Formula			
- Special Baby Milk Formula			
Prepared Baby Food			
Other Baby Food			
Baby Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Soy-based Vs Dairy-based Special Baby Milk Formula % Breakdown 2010

% value analysis

	Soy-based	Dairy-based	Total
Special Baby Milk Formula			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Baby Food Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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Table 7 Baby Food Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Baby Food by Distribution Format: % Analysis 2006-2011

% retail value rsp

	2006	2007	2008	2009	2010	2011
Store-Based Retailing						
- Grocery Retailers						
- - Supermarkets/ Hypermarkets						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Independent Small Grocers						
- - - Forecourt Retailers						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
- - Health and Beauty Retailers						
- - Other Non-Grocery Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- Internet Retailing						
- Direct Selling						

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Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Baby Food by Category: Volume 2011-2016

	2011	2012	2013	2014	2015	2016
Dried Baby Food (tonnes)						
Milk Formula (Not calculable)						
- Standard Milk Formula (Not calculable)						
- Follow-on Milk Formula (Not calculable)						
- Toddler Milk Formula (Not calculable)						
- Special Baby Milk Formula (Not calculable)						
Prepared Baby Food (tonnes)						
Other Baby Food (tonnes)						
Baby Food (Not calculable)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Baby Food by Category: Value 2011-2016

Peso million

	2011	2012	2013	2014	2015	2016
Dried Baby Food						
Milk Formula						
- Standard Milk Formula						
- Follow-on Milk Formula						
- Toddler Milk Formula						
- Special Baby Milk Formula						
Prepared Baby Food						
Other Baby Food						
Baby Food						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Baby Food by Category: % Volume Growth 2011-2016

	2015/16	2011-16 CAGR	2011/16 Total
Dried Baby Food (% volume growth)			
Milk Formula (Not calculable)			
- Standard Milk Formula (Not calculable)			
- Follow-on Milk Formula (Not calculable)			
- Toddler Milk Formula (Not calculable)			

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- Special Baby Milk Formula (Not calculable)	
Prepared Baby Food (% volume growth)	
Other Baby Food (% volume growth)	
Baby Food (Not calculable)	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Baby Food by Category: % Value Growth 2011-2016

% constant value growth

	2011-16 CAGR	2011/16 TOTAL
Dried Baby Food		
Milk Formula		
- Standard Milk Formula		
- Follow-on Milk Formula		
- Toddler Milk Formula		
- Special Baby Milk Formula		
Prepared Baby Food		
Other Baby Food		
Baby Food		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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BABY FOOD IN ARGENTINA COMPANY PROFILES

MASTELLONE HNOS SA IN PACKAGED FOOD (ARGENTINA)

strategic Direction

~ Mastelione Hnos SA, which operators in the dairy, baby food and oils and fats categories, is pursuing a value-added strategy, accompanied by a strong advertising campaign. It is launching dairy products with functional features and taking advantage of the trend towards healthier products.

Key Facts

Summary 1 Mastelione Hnos SA: Key Facts

Full name of company:	Mastelione Hnos SA
Address:	Alte. 8rown 957 (81748KFS), Gral Rodriguez, Buenos Aires, Argentina
Tel:	+54 (23) 7485 9000
Fax:	+54 (23) 7485 9000
www:	www.laserenisima.com.ar
Activities:	Manufacturer of dairy products, oils and fats, spreads and baby food

Source: EuromonitorInternationalfrom companyreports, companyresearch, trade press, trade sources

Summary 2 Mastelione Hnos SA: Operational Indicators

	2008	2009	2010
Net sales	ARS 2,524 million	ARS 3,365 million	ARS 3,890 miliion
Net profit	ARS (265) million	ARS 55 million	ARS 91 million
Number of employees	3,600	*n/a*	n/a

Source: EuromonltorIntemationalfrom companyreports, companyresearch, trade press, trade sources

Company Background

~ Mastelione Hnos SA is owned by the Mastelione family, which founded the company in 1929 and stili runs it today. Pascual, Jose and Victorio Mastellone own 67% of Mastelione Hnos SA, while Dalipoint Investment owns the remaining 33%.

~ The company's core business is dairy products, with the main focus on drinking milk products and liquid yoghurts. It operates a joint venture called Logistica La Serenisima SA with Danone Argentina SA, with whom it shares the distribution and manufacturing activities for certain

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products in yoghurt, chilled dairy-based desserts, dairy only flavoured milk drinks and spreadable unprocessed cheese.

- Logistica La Serenisima SA, a joint venture with Danone Argentina SA, has 1,200 employees and operates more than 1,100 vehicles. This wide distribution network reaches more than 79,000 sales points all over the country. It must be noted, however, that its stronghold is in Buenos Aires and its surrounding areas.
- The company offers leading products at affordable prices, supported by continuous advertising.
- In order to stimulate consumption of functional products, Mastellone launched a website called Leche y Nutrtcion, ("milk and nutrition", www.lecheynutricion.com.ar) which explains how to lead a healthy life through the consumption of functional dairy products according to each consumer's profile (children, adults, celiacs, diabetics, etc).
- Mastellone Hnos SA and Cabrales SA launched in August 2010, Cappuccino Estilo Italiano, ready-to-drink mi k with coffee in 200ml brick liquid packaging.
- Addressing the trend towards healthier food, Mastellone Hnos SA added functional features to its soft cheese product offer. For example, it incorporated Lactobacillus GG to its Cremoso, Por Salut, Por Salut Light and Saint Paulin light cheese products. Lactobacillus GG is a probiotic that the company claims helps balance intestinal microflora and strengthen the body's natural defences.
- In 2010, Mastellone closed its second year with profits since 2004 with a total net income of ARS91 million in 2010. Mastellone also restructured its accumulated long-term debt of US$220 million dollars in May 2010, with Merrill Lynch Argentina SA as financial advisor.

Production

- Mastellone manufactures its products locally with local raw materials. The company operates 21 production facilities covering the whole country.
- The company exports its products to more than 30 countries, with Brazil an important destination. Its main exports are powder mi k, butter and hard cheese.
- Mastellone operates commercial subsidiaries in Brazil but no manufacturing facilities outside Argentina.
- The company manufactures some private label products for supermarkets/hypermarkets, including Jumbo.

Summary 3 Mastellone Hnos SA: Production Statistics 2010

Location
General Rodriguez, Buenos Aires
Longchamps, Buenos Aires

Source: EuromonitorInternationalfrom companyreports, companyresearch, trade press, trade sources, trade interviews

Competitive Positioning

- Mastellone Hnos SA held a 7% value share of packaged food in Argentina in 2010, ranking second. It ranked first in dairy with a 23% share. It has maintained its 7% share in packaged food since 2006 thanks to the constant updating of its products and continuous advertising.

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~ Mastellone led sales of drinking milk products with a 43% value share in 2010. The main factor behind this position is the high brand equity and loyalty enjoyed by its La Serenisima brand. Additionally, its wide distribution network allows its products to reach all retail channels.

~ Within drinking rni k products, Mastellone saw the largest increase in value sales in 2010 with a rise of two percentage points. This growth was mainly a result of the four percentage point increase of La Serenisima in the fresh/pasteurised milk category. The chilled distribution network in Buenos Aires province was crucial for gaining ground in the milk market.

~ In September 2011, La Serenisima relaunched its Serecol line, which is now to be called Serecol 3, because of its nutritional value-added contents of phytosterols, omega-3 and natural calcium. In addition, Mastellone launched La Serenisima Fibractiva, a skimmed, 0% fat and cholesterol rni k, with soluble fibre additives.

~ Mastellone launched in May 2011, Chubut La Serenisima a semi-hard cheese of soft texture. In July 2011, Mastellone launched Leche La Serenisima +4 Aries (4+ years) whole, ultra-pasteurised milk with added natural calcium and fortified with iron, zinc and vitamins A, D, C and E.

~ In May 2011, Mastellone launched a television campaign to promote its Dulce de Leche Colonial La Serenisima, highlighting the quality of its ingredients and its respect for the traditional dulce de leche recipe.

~ The company can be considered an innovator; it was the first to launch functional mi k and yoghurt products in Argentina and continuously updates its products with new functional ingredients.

~ Mastellone leads the dairy category as it has always invested in production facilities and an extensive refrigerated distribution system. The company is expected to increasingly focus on value-added products to improve its margins over the forecast period.

~ Mastellone is only present in packaged food. The company derives the vast majority of its value share from the dairy category, although it is also present in baby food (milk formula), oils and fats and spreads. Within oils and fats it is present in butter, which in Argentina is considered a dairy product, while in spreads its presence is concentrated within jams because of its dulce de leche offering, which is also considered to be part of the dairy industry in Argentina.

~ Within the dairy category it has a wide product offering, although it is more focused on categories where it does not compete with Danone Argentina. Nevertheless, it is present in certain categories in which it directly competes with, and outperforms, Danone Argentina, eg unprocessed cheese and drinking milk products.

~ Mastellone is well positioned for future growth, as it has a number of functional products that may allow it to take advantage of the health and wellness trend. The company also operates some low-priced brands that are expected to perform well in the short term.

~ The company's main brand, La Serenisima, which holds the highest brand share of all the company's offerings and is ranked first in packaged food overall, is in the mid-priced/premium segment. Mastellone does operate other brands, including Fortuna and La Armonia, which are positioned more in the lower-end segment.

Summary 4 Mastellone Hnos SA: Competitive Position 2010

Product type	Retail Value Share	Rank
Packaged food	6.8%	2
Nutrition/staples	13.5%	

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Drinking mi k products	43.0%
Milk	60.0%

Source: EuromonitorIntemational from company reports, company research, trade press. trade sources. trade interviews

MOLINOS Rio DE LA PLATA SA IN PACKAGED FOOD (ARGENTINA)

Strategic Direction

Key Facts

Summary 5 Molinos Rio de la Plata SA: Key Facts

Full name of company:	Molinos Rio de la Plata SA
Address:	Uruguay 4075, Victoria, Buenos Aires, Argentina
Tel:	+54 (1'1)4340 1100
Fax:	+54 (1'1)4340 '1200
www:	www.molinos.com.ar
Activities:	Manufacturer of baked goods, ready meals, pasta, canned/preserved food, frozen processed food, dried processed food, chilled processed food, oils and fats, and sauces dressings and condiments

Source: EuromonitorIntemational from company reports, company research, trade press, trade sources

Summary 6 Molinos Rio de la Plata SA: Operational Indicators

	2008	2009	2010
Net sales	Removed	Removed	Removed
Net profit	Removed	Removed	Removed
Number of employees	Removed	Removed	Removed

Source: EuromonitorIntemational from company reports, company research, trade press, trade sources

Company Background

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- Molinos Río de la Plata SA is a public company controlled by the Pérez Companc Group, one of the most important economic groups in Argentina, focused primarily on food and agriculture. 20% of the company is traded on the Argentine stock exchange.

Production

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Summary 7 Molinos Rio de la Plata SA: Production Statistics 2010

Location	Brand
Avellaneda, Buenos Aires	Removed
Rosario, Santa Fe	Removed
San Lorenzo, Santa Fe	Removed
Villa Adelina, Buenos Aires	Removed
Fontana, Chaco	Removed
Mar del Plata, Buenos Aires	Removed
Tortuguitas, Buenos Aires	Removed
Buenos Aires, Buenos Aires	Removed
San Luis, San Luis	Removed
Pilar, Buenos Aires	Removed
San Jose, Misiones	Removed
Villa Tesei, Buenos Aires	Removed
Santa Lucia, San Juan	Removed

Source: Euromonitor International from company reports, company research, trace press, trade sources, trade interviews

Competitive Positioning

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Summary 8 Molinos Rio de la Plata SA: Competitive Position 2010

Product type	Retail Value Share	Rank
Packaged food	Removed	Removed
Nutrition/staples	Removed	Removed
Meal solutions	Removed	Removed

Source: EuromonitorInternationalfrom company reports, company research, trade press, trade sources, trade interviews

SANCOR COOPERATIVAS UNIDAS LTDA IN PACKAGED FOOD (ARGENTINA)

strategic Direction

Key Facts

Summary 9 SanCor Cooperativas Unidas Ltda: Key Facts

Full name of company:	SanCor Cooperativas Unidas Uda
Address:	Teniente General Richieri 15 - C.P. S2322FYA - Sunchales, Provincia de Santa Fe, Argentina
Tel:	+54 (34) 9342 8000
Fax:	+54 (34) 9342 8081
www:	www.sancor.com.ar
Activities:	Manufacturer of dairy products, oils and fats, baby food and spreads

Source: EuromonitorInternationalfrom company reports, company research, trade press, trade sources

Summary 10 SanCor Cooperativas Unidas Ltda: Operational Indicators

2008	2009	20'10

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Net sales	Removed	Removed	Removed
Net profit	Removed	Removed	Removed
Number of employees	Removed	Removed	Removed

Source: Euromonitor International from company reports, company research, trade press, trade sources

Company Background

- SanCor Cooperativas Unidas Uda was founded in 1938 as a cooperative of small dairy farmers of the Santa Fe and Cordoba provinces. In 201'I it remains a cooperative grouping that includes 61 smaller cooperatives and 758 small dairy farmers.

Production

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Competitive Positioning

Summary 11 SanCor Cooperativas Unidas Ltda: Competitive Position 2010

Product type	Retail Value Share	Rank
Packaged food	Removed	Removed
Nutrition/staples	Removed	Removed
Dairy products	Removed	Removed

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Drinking mi k products	Removed	Removed

Source: EuromonitorIntemational from company reports, companyresearch, trade press, trade sources, trade interviews

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PACKAGED FOOD IN ARGENTINA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Rising Demand Drives Growth

Consumption continues to be a key driver of Argentina's economic growth. The economy is seeing strong development in 2011, on the back of a solid performance in production, consumption and exports. The strong rebound in output has boosted the packaged food industry; in general consumers are also exhibiting an enthusiastic appetite for consumption.

Fresh Meat Consumption Declines, Impacting the Argentinian Diet

In 2011, fresh red meat has seen heavy price increases, exceeding the rate of inflation. According to Cámara de la Industria y Comercio de Carnes y Derivados de la República, Argentinians' consumption of fresh meat plunged by 26%, from annual per capita consumption of 70.3kg in 2009 to 52.3kg in 2011. According to the Instituto de Promoción de Carne Vacuna Argentina (Organisation for the Promotion of Red Meat), poultry prices also increased by up to 60% in 2011.Both trends left a gap to be filled by alternative packaged food products such as pasta and frozen processed food.

Inflation Threatens Levels of Consumption of Packaged Food

Double-digit inflation has become a key weakness for the Argentinian economy, eroding company profitability in 2011. Official data shows consumer prices rose 11% in the 12 months through to September 2011, however unofficial forecasts indicate that real inflation is at least twice that rate. Operating costs have become a major issue due to the rise in labour and fixed costs, which are putting a serious strain on the profitability of small and medium-sized food producers. At the same time inflation has started to erode the purchasing power of lower-income groups, limiting their expenditure on packaged food.

Strong Pressure To Discount Driven by Supermarkets/hypermarkets

Sales through supermarkets/hypermarkets continue to drive revenues in the overall packaged food industry in Argentina. However, rising prices force consumers to be more selective and smarter in their purchases. Banks, brand operators and retailers have started to work together to offer various promotions to stimulate demand and build consumer loyalty. Major banks started this trend after the local financial crisis in 2001-2002. Carrefour (Carrefour SA), Wal-Mart (Wal-Mart de Argentina SA), Jumbo (Cencosud SA) and Coto (Coto CICSA), the leading supermarkets/hypermarkets operators, reinforced their strategies after the slowdown in 2009 and because of increasing inflationary pressures.

Slower Growth Projected for 2012

A difficult macroeconomic climate, alongside the deterioration in international financial conditions, has started to affect consumer expectations; lowering consumption growth during Q3 in 2011.The consumer mood has also been dampened by rising inflation. If the unofficial inflation estimates are correct, expectations of high inflation will erode consumer purchasing power, undermining spending potential and reducing potential profits for businesses. Therefore

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packaged food consumption is projected to see a slowdown in its growth in constant value terms in 2012.

KEY TRENDS AND DEVELOPMENTS

Economic Expansion Driven by Strong Consumer Spending

Current impact

Outlook

Future impact

Argentinian Diet Changes As Fresh Meat Consumption Declines

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Current Impact

Outlook

Future Impact

Dynamic Packaged Food Industry Grows Despite Inflation

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Current impact

Outlook

Future impact

Healthier and More Nutritious Products Prosper Across Packaged Food

Current Impact

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Outlook

Future Impact

FOODSERVICE – KEY TRENDS AND DEVELOPMENTS

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Table 51 Foodservice Sales of Packaged Food by Category: Volume 2006-2011

	2006	2007	2008	2009	2010	2011
Baby Food (Not calculable)						
Bakery (tonnes)						
Canned/Preserved Food (tonnes)						
Chilled Processed Food (tonnes)						
Confectionery (tonnes)						
Dairy (Not calculable)						
Dried Processed Food (tonnes)						

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Frozen Processed Food (tonnes)
Ice Cream ('000 litres)
Meal Replacement (tonnes)
Noodles (tonnes)
Oils and Fats (tonnes)
Pasta (tonnes)
Ready Meals (tonnes)
Sauces, Dressings and Condiments (tonnes)
Snack Bars (tonnes)
Soup (tonnes)
Spreads (tonnes)
Sweet and Savoury Snacks (tonnes)
Impulse and Indulgence Products (Not calculable)
Nutrition/Staples (Not calculable)
Meal Solutions (tonnes)
Packaged Food (Not calculable)

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Foodservice Sales of Packaged Food by Category: % Volume Growth 2006-2011

	2010/11	2006-11 CAGR	2006/11 Total
Baby Food (Not calculable)			
Bakery (% volume growth)			
Canned/Preserved Food (% volume growth)			
Chilled Processed Food (% volume growth)			
Confectionery (% volume growth)			
Dairy (Not calculable)			
Dried Processed Food (% volume growth)			
Frozen Processed Food (% volume growth)			
Ice Cream (% volume growth)			
Meal Replacement (% volume growth)			
Noodles (% volume growth)			
Oils and Fats (% volume growth)			
Pasta (% volume growth)			
Ready Meals (% volume growth)			
Sauces, Dressings and Condiments (% volume growth)			
Snack Bars (% volume growth)			
Soup (% volume growth)			
Spreads (% volume growth)			
Sweet and Savoury Snacks (% volume growth)			
Impulse and Indulgence Products (Not calculable)			
Nutrition/Staples (Not calculable)			
Meal Solutions (% volume growth)			
Packaged Food (Not calculable)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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Table 53 Forecast Foodservice Sales of Packaged Food by Category: Volume 2011-2016

	2011	2012	2013	2014	2015	2016
Baby Food (Not calculable)						
Bakery (tonnes)						
Canned/Preserved Food (tonnes)						
Chilled Processed Food (tonnes)						
Confectionery (tonnes)						
Dairy (Not calculable)						
Dried Processed Food (tonnes)						
Frozen Processed Food (tonnes)						
Ice Cream ('000 litres)						
Meal Replacement (tonnes)						
Noodles (tonnes)						
Oils and Fats (tonnes)						
Pasta (tonnes)						
Ready Meals (tonnes)						
Sauces, Dressings and Condiments (tonnes)						
Snack Bars (tonnes)						
Soup (tonnes)						
Spreads (tonnes)						
Sweet and Savoury Snacks (tonnes)						
Impulse and Indulgence Products (Not calculable)						
Nutrition/Staples (Not calculable)						
Meal Solutions (tonnes)						
Packaged Food (Not calculable)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 54 Forecast Foodservice Sales of Packaged Food by Category: % Volume Growth 2011-2016

	2015/16	2011-16 CAGR	2011/16 Total
Baby Food (Not calculable)			
Bakery (% volume growth)			
Canned/Preserved Food (% volume growth)			
Chilled Processed Food (% volume growth)			
Confectionery (% volume growth)			
Dairy (Not calculable)			
Dried Processed Food (% volume growth)			
Frozen Processed Food (% volume growth)			
Ice Cream (% volume growth)			

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Meal Replacement (% volume growth)
Noodles (% volume growth)
Oils and Fats (% volume growth)
Pasta (% volume growth)
Ready Meals (% volume growth)
Sauces, Dressings and Condiments (% volume growth)
Snack Bars (% volume growth)
Soup (% volume growth)
Spreads (% volume growth)
Sweet and Savoury Snacks (% volume growth)
Impulse and Indulgence Products (Not calculable)
Nutrition/Staples (Not calculable)
Meal Solutions (% volume growth)
Packaged Food (Not calculable)

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

IMPULSE AND INDULGENCE PRODUCTS – KEY TRENDS AND DEVELOPMENTS

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Prospects

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Table 55 Sales of Impulse and Indulgence Products by Category: Volume 2006-2011

	2006	2007	2008	2009	2010	2011
Confectionery ('000 tonnes)						
Pastries ('000 tonnes)						
Cakes ('000 tonnes)						
Biscuits ('000 tonnes)						
Ice Cream (million litres)						
Sweet and Savoury Snacks ('000 tonnes)						

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Snack Bars ('000 tonnes)	
Impulse and Indulgence Products (Not calculable)	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 Sales of Impulse and Indulgence Products by Category: Value 2006-2011

Peso million

	2006	2007	2008	2009	2010	2011
Confectionery						
Pastries						
Cakes						
Biscuits						
Ice Cream						
Sweet and Savoury Snacks						
Snack Bars						
Impulse and Indulgence Products						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 Sales of Impulse and Indulgence Products by Category: % Volume Growth 2006-2011

% volume growth

	2010/11	2006-11 CAGR	2006/11 Total
Confectionery			
Pastries			
Cakes			
Biscuits			
Ice Cream			
Sweet and Savoury Snacks			
Snack Bars			
Impulse and Indulgence Products			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 Sales of Impulse and Indulgence Products by Category: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Confectionery			
Pastries			
Cakes			
Biscuits			
Ice Cream			
Sweet and Savoury Snacks			
Snack Bars			
Impulse and Indulgence Products			

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برای دریافت اطلاعات بیشتر با شماره
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 Company Shares of Impulse and Indulgence Products 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 60 Brand Shares of Impulse and Indulgence Products 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

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Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 Forecast Sales of Impulse and Indulgence Products by Category: Volume 2011-2016

	2011	2012	2013	2014	2015	2016
Confectionery ('000 tonnes)						
Pastries ('000 tonnes)						
Cakes ('000 tonnes)						
Biscuits ('000 tonnes)						
Ice Cream (million litres)						
Sweet and Savoury Snacks ('000 tonnes)						
Snack Bars ('000 tonnes)						
Impulse and Indulgence Products (Not calculable)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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Table 62 Forecast Sales of Impulse and Indulgence Products by Category: Value 2011-2016

Peso million

	2011	2012	2013	2014	2015	2016
Confectionery						
Pastries						
Cakes						
Biscuits						
Ice Cream						
Sweet and Savoury Snacks						
Snack Bars						
Impulse and Indulgence Products						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 63 Forecast Sales of Impulse and Indulgence Products by Category: % Volume Growth 2011-2016

% volume growth

	2015/16	2011-16 CAGR	2011/16 Total
Confectionery			
Pastries			
Cakes			
Biscuits			
Ice Cream			
Sweet and Savoury Snacks			
Snack Bars			
Impulse and Indulgence Products			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Sales of Impulse and Indulgence Products by Category: % Value Growth 2011-2016

% constant value growth

	2011-16 CAGR	2011/16 TOTAL
Confectionery		
Pastries		
Cakes		
Biscuits		
Ice Cream		
Sweet and Savoury Snacks		
Snack Bars		
Impulse and Indulgence Products		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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Category Data

Table 65 Sales of Nutrition/Staples by Category: Volume 2006-2011

	2006	2007	2008	2009	2010	2011
Bread ('000 tonnes)						
Breakfast Cereals ('000 tonnes)						
Dairy (Not calculable)						
Meal Replacement Products ('000 tonnes)						
Oils and Fats ('000 tonnes)						
Baby Food (Not calculable)						
Spreads ('000 tonnes)						
Pasta ('000 tonnes)						
Noodles ('000 tonnes)						
Rice ('000 tonnes)						
Nutrition/Staples (Not calculable)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 Sales of Nutrition/Staples by Category: Value 2006-2011

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Peso million

	2006	2007	2008	2009	2010	2011
Bread						
Breakfast Cereals						
Dairy						
Meal Replacement Products						
Oils and Fats						
Baby Food						
Spreads						
Pasta						
Noodles						
Rice						
Nutrition/Staples						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Sales of Nutrition/Staples by Category: % Volume Growth 2006-2011

	2010/11	2006-11 CAGR	2006/11 Total
Bread (% volume growth)			
Breakfast Cereals (% volume growth)			
Dairy (Not calculable)			
Meal Replacement Products (% volume growth)			
Oils and Fats (% volume growth)			
Baby Food (Not calculable)			
Spreads (% volume growth)			
Pasta (% volume growth)			
Noodles (% volume growth)			
Rice (% volume growth)			
Nutrition/Staples (Not calculable)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 Sales of Nutrition/Staples by Category: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Bread			
Breakfast Cereals			
Dairy			
Meal Replacement Products			
Oils and Fats			
Baby Food			
Spreads			
Pasta			
Noodles			
Rice			
Nutrition/Staples			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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Table 69 Company Shares of Nutrition/Staples 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 Brand Shares of Nutrition/Staples 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

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Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 Forecast Sales of Nutrition/Staples by Category: Volume 2011-2016

	2011	2012	2013	2014	2015	2016
Bread ('000 tonnes)						
Breakfast Cereals ('000 tonnes)						
Dairy (Not calculable)						
Meal Replacement Products ('000 tonnes)						
Oils and Fats ('000 tonnes)						
Baby Food (Not calculable)						
Spreads ('000 tonnes)						
Pasta ('000 tonnes)						
Noodles ('000 tonnes)						
Rice ('000 tonnes)						
Nutrition/Staples (Not calculable)						

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 72 Forecast Sales of Nutrition/Staples by Category: Value 2011-2016

Peso million

	2011	2012	2013	2014	2015	2016
Bread						
Breakfast Cereals						
Dairy						
Meal Replacement Products						
Oils and Fats						
Baby Food						
Spreads						
Pasta						
Noodles						
Rice						
Nutrition/Staples						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 73 Forecast Sales of Nutrition/Staples by Category: % Volume Growth 2011-2016

	2015/16	2011-16 CAGR	2011/16 Total
Bread (% volume growth)			
Breakfast Cereals (% volume growth)			
Dairy (Not calculable)			
Meal Replacement Products (% volume growth)			
Oils and Fats (% volume growth)			
Baby Food (Not calculable)			
Spreads (% volume growth)			
Pasta (% volume growth)			
Noodles (% volume growth)			
Rice (% volume growth)			
Nutrition/Staples (Not calculable)			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 74 Forecast Sales of Nutrition/Staples by Category: % Value Growth 2011-2016

% constant value growth

	2011-16 CAGR	2011/16 TOTAL
Bread		
Breakfast Cereals		
Dairy		
Meal Replacement Products		
Oils and Fats		
Baby Food		
Spreads		
Pasta		
Noodles		

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Rice
Nutrition/Staples

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

MEAL SOLUTIONS – KEY TRENDS AND DEVELOPMENTS

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Prospects

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Table 75 Sales of Meal Solutions by Category: Volume 2006-2011

'000 tonnes

	2006	2007	2008	2009	2010	2011
Ready Meals						
Canned/Preserved Food						
Frozen Processed Food						
Dessert Mixes						

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Dinner Mixes	
Chilled Processed Food	
Sauces, Dressings and Condiments	
Soup	
Meal Solutions	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 76 Sales of Meal Solutions by Category: Value 2006-2011

Peso million

	2006	2007	2008	2009	2010	2011
Ready Meals						
Canned/Preserved Food						
Frozen Processed Food						
Dessert Mixes						
Dinner Mixes						
Chilled Processed Food						
Sauces, Dressings and Condiments						
Soup						
Meal Solutions						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 77 Sales of Meal Solutions by Category: % Volume Growth 2006-2011

% volume growth

	2010/11	2006-11 CAGR	2006/11 Total
Ready Meals			
Canned/Preserved Food			
Frozen Processed Food			
Dessert Mixes			
Dinner Mixes			
Chilled Processed Food			
Sauces, Dressings and Condiments			
Soup			
Meal Solutions			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 Sales of Meal Solutions by Category: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Ready Meals			
Canned/Preserved Food			
Frozen Processed Food			
Dessert Mixes			
Dinner Mixes			
Chilled Processed Food			

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Sauces, Dressings and Condiments
Soup
Meal Solutions

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 Company Shares of Meal Solutions 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 80 Brand Shares of Meal Solutions 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

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Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 81 Forecast Sales of Meal Solutions by Category: Volume 2011-2016

'000 tonnes

	2011	2012	2013	2014	2015	2016
Ready Meals						
Canned/Preserved Food						
Frozen Processed Food						
Dessert Mixes						
Dinner Mixes						
Chilled Processed Food						
Sauces, Dressings and Condiments						
Soup						
Meal Solutions						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 82 Forecast Sales of Meal Solutions by Category: Value 2011-2016

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Peso million

	2011	2012	2013	2014	2015	2016
Ready Meals						
Canned/Preserved Food						
Frozen Processed Food						
Dessert Mixes						
Dinner Mixes						
Chilled Processed Food						
Sauces, Dressings and Condiments						
Soup						
Meal Solutions						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 83 Forecast Sales of Meal Solutions by Category: % Volume Growth 2011-2016

% volume growth

	2015/16	2011-16 CAGR	2011/16 Total
Ready Meals			
Canned/Preserved Food			
Frozen Processed Food			
Dessert Mixes			
Dinner Mixes			
Chilled Processed Food			
Sauces, Dressings and Condiments			
Soup			
Meal Solutions			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 84 Forecast Sales of Meal Solutions by Category: % Value Growth 2011-2016

% constant value growth

	2011-16 CAGR	2011/16 TOTAL
Ready Meals		
Canned/Preserved Food		
Frozen Processed Food		
Dessert Mixes		
Dinner Mixes		
Chilled Processed Food		
Sauces, Dressings and Condiments		
Soup		
Meal Solutions		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

MARKET DATA

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Table 85 Sales of Packaged Food by Category: Volume 2006-2011

	2006	2007	2008	2009	2010	2011
Baby Food (Not calculable)						
Bakery ('000 tonnes)						
Canned/Preserved Food ('000 tonnes)						
Chilled Processed Food ('000 tonnes)						
Confectionery ('000 tonnes)						
Dairy (Not calculable)						
Dried Processed Food ('000 tonnes)						
Frozen Processed Food ('000 tonnes)						
Ice Cream (million litres)						
Meal Replacement ('000 tonnes)						
Noodles ('000 tonnes)						
Oils and Fats ('000 tonnes)						
Pasta ('000 tonnes)						
Ready Meals ('000 tonnes)						
Sauces, Dressings and Condiments ('000 tonnes)						
Snack Bars ('000 tonnes)						
Soup ('000 tonnes)						
Spreads ('000 tonnes)						
Sweet and Savoury Snacks ('000 tonnes)						
Impulse and Indulgence Products (Not calculable)						
Nutrition/Staples (Not calculable)						
Meal Solutions ('000 tonnes)						
Packaged Food (Not calculable)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Notes: Sum of sectors does not equal total packaged food because of double counting (eg canned soup is included in soups and canned foods)
Volume sales cannot be consolidated due to different unit measurements (eg confectionery in tonnes and ice cream in litres)

Table 86 Sales of Packaged Food by Category: Value 2006-2011

Peso million

	2006	2007	2008	2009	2010	2011
Baby Food						
Bakery						
Canned/Preserved Food						
Chilled Processed Food						
Confectionery						

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Dairy	
Dried Processed Food	
Frozen Processed Food	
Ice Cream	
Meal Replacement	
Noodles	
Oils and Fats	
Pasta	
Ready Meals	
Sauces, Dressings and Condiments	
Snack Bars	
Soup	
Spreads	
Sweet and Savoury Snacks	
Impulse and Indulgence Products	
Nutrition/Staples	
Meal Solutions	
Packaged Food	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Notes: Sum of sectors does not equal total packaged food because of double counting (eg canned soup is included in soups and canned foods)

Table 87 Sales of Packaged Food by Category: % Volume Growth 2006-2011

	2010/11	2006-11 CAGR	2006/11 Total
Baby Food (Not calculable)			
Bakery (% volume growth)			
Canned/Preserved Food (% volume growth)			
Chilled Processed Food (% volume growth)			
Confectionery (% volume growth)			
Dairy (Not calculable)			
Dried Processed Food (% volume growth)			
Frozen Processed Food (% volume growth)			
Ice Cream (% volume growth)			
Meal Replacement (% volume growth)			
Noodles (% volume growth)			
Oils and Fats (% volume growth)			
Pasta (% volume growth)			
Ready Meals (% volume growth)			
Sauces, Dressings and Condiments (% volume growth)			
Snack Bars (% volume growth)			
Soup (% volume growth)			
Spreads (% volume growth)			
Sweet and Savoury Snacks (% volume growth)			
Impulse and Indulgence Products (Not calculable)			
Nutrition/Staples (Not calculable)			
Meal Solutions (% volume growth)			
Packaged Food (Not calculable)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Notes: Sum of sectors does not equal total packaged food because of double counting (eg canned soup is included in soups and canned foods)

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Volume sales cannot be consolidated due to different unit measurements (eg confectionery in tonnes and ice cream in litres)

Table 88 Sales of Packaged Food by Category: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Baby Food			
Bakery			
Canned/Preserved Food			
Chilled Processed Food			
Confectionery			
Dairy			
Dried Processed Food			
Frozen Processed Food			
Ice Cream			
Meal Replacement			
Noodles			
Oils and Fats			
Pasta			
Ready Meals			
Sauces, Dressings and Condiments			
Snack Bars			
Soup			
Spreads			
Sweet and Savoury Snacks			
Impulse and Indulgence Products			
Nutrition/Staples			
Meal Solutions			
Packaged Food			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Notes: Sum of sectors does not equal total packaged food because of double counting (eg canned soup is included in soups and canned foods)

Table 89 GBO Shares of Packaged Food 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

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	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 NBO Shares of Packaged Food 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

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Total		100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 NBO Brand Shares of Packaged Food 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

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Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 92 Penetration of Private Label by Category 2006-2011

% retail value rsp

	2006	2007	2008	2009	2010	2011
Bakery						
Canned/Preserved Food						
Chilled Processed Food						
Dairy						
Dried Processed Food						
Frozen Processed Food						
Ice Cream						
Impulse and Indulgence Products						
Meal Solutions						
Nutrition/Staples						
Oils and Fats						
Packaged Food						
Pasta						
Ready Meals						
Sauces, Dressings and Condiments						
Snack Bars						
Spreads						
Sweet and Savoury Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 93 Sales of Packaged Food by Distribution Format: % Analysis 2006-2011

% retail value rsp

	2006	2007	2008	2009	2010	2011
Store-Based Retailing						
- Grocery Retailers						
- - Supermarkets/ Hypermarkets						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Independent Small Grocers						
- - - Forecourt Retailers						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
- - Health and Beauty Retailers						
- - Other Non-Grocery Retailers						

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Non-Store Retailing						
- Vending						
- Homeshopping						
- Internet Retailing						
- Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 94 Sales of Packaged Food by Category and Distr bution Format: % Analysis 2011

% retail value rsp

	BF	B	CPF	CHP	C	D
Store-Based Retailing						
Grocery Retailers						
Supermarkets/Hypermarkets						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Independent Small Grocers						
Forecourt Retailers						
Confectionery specialists						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	DPF	FPF	IC	MR	NOO	OF
Store-Based Retailing						
Grocery Retailers						
Supermarkets/Hypermarkets						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Independent Small Grocers						
Forecourt Retailers						
Confectionery specialists						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						

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Total	100.0	100.0	100.0	100.0	100.0	100.0

	P	RM	SDC	SB	SOU	SPR
Store-Based Retailing						
Grocery Retailers						
Supermarkets/Hypermarkets						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Independent Small Grocers						
Forecourt Retailers						
Confectionery specialists						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	SSS
Store-Based Retailing	
Grocery Retailers	
Supermarkets/Hypermarkets	
Discounters	
Small Grocery Retailers	
Convenience Stores	
Independent Small Grocers	
Forecourt Retailers	
Confectionery specialists	
Other Grocery Retailers	
Non-Grocery Retailers	
Health and Beauty Retailers	
Other Non-Grocery Retailers	
Non-Store Retailing	
Vending	
Homeshopping	
Internet Retailing	
Direct Selling	
Total	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BF = baby food; B = bakery; CPF = canned/preserved food; CHP = chilled processed food; C = confectionery; D = dairy; DPF = dried processed food; FPF = frozen processed food; IC = ice cream; MR = meal replacement; NOO = noodles; OF = oils and fats; P = pasta; RM = ready meals; SDC = sauces, dressings and condiments; SB = snack bars; SOU = soup; SPR = spreads; SSS = sweet and savoury snacks

Table 95 Forecast Sales of Packaged Food by Category: Volume 2011-2016

	2011	2012	2013	2014	2015	2016

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Baby Food (Not calculable)
Bakery ('000 tonnes)
Canned/Preserved Food ('000 tonnes)
Chilled Processed Food ('000 tonnes)
Confectionery ('000 tonnes)
Dairy (Not calculable)
Dried Processed Food ('000 tonnes)
Frozen Processed Food ('000 tonnes)
Ice Cream (million litres)
Meal Replacement ('000 tonnes)
Noodles ('000 tonnes)
Oils and Fats ('000 tonnes)
Pasta ('000 tonnes)
Ready Meals ('000 tonnes)
Sauces, Dressings and Condiments ('000 tonnes)
Snack Bars ('000 tonnes)
Soup ('000 tonnes)
Spreads ('000 tonnes)
Sweet and Savoury Snacks ('000 tonnes)
Impulse and Indulgence Products (Not calculable)
Nutrition/Staples (Not calculable)
Meal Solutions ('000 tonnes)
Packaged Food (Not calculable)

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 96 Forecast Sales of Packaged Food by Category: Value 2011-2016

Peso million

	2011	2012	2013	2014	2015	2016
Baby Food						
Bakery						
Canned/Preserved Food						
Chilled Processed Food						
Confectionery						
Dairy						
Dried Processed Food						
Frozen Processed Food						
Ice Cream						
Meal Replacement						
Noodles						
Oils and Fats						

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Pasta	
Ready Meals	
Sauces, Dressings and Condiments	
Snack Bars	
Soup	
Spreads	
Sweet and Savoury Snacks	
Impulse and Indulgence Products	
Nutrition/Staples	
Meal Solutions	
Packaged Food	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 97 Forecast Sales of Packaged Food by Category: % Volume Growth 2011-2016

	2015/16	2011-16 CAGR	2011/16 Total
Baby Food (Not calculable)			
Bakery (% volume growth)			
Canned/Preserved Food (% volume growth)			
Chilled Processed Food (% volume growth)			
Confectionery (% volume growth)			
Dairy (Not calculable)			
Dried Processed Food (% volume growth)			
Frozen Processed Food (% volume growth)			
Ice Cream (% volume growth)			
Meal Replacement (% volume growth)			
Noodles (% volume growth)			
Oils and Fats (% volume growth)			
Pasta (% volume growth)			
Ready Meals (% volume growth)			
Sauces, Dressings and Condiments (% volume growth)			
Snack Bars (% volume growth)			
Soup (% volume growth)			
Spreads (% volume growth)			
Sweet and Savoury Snacks (% volume growth)			
Impulse and Indulgence Products (Not calculable)			
Nutrition/Staples (Not calculable)			
Meal Solutions (% volume growth)			
Packaged Food (Not calculable)			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 98 Forecast Sales of Packaged Food by Category: % Value Growth 2011-2016

% constant value growth

	2011-16 CAGR	2011/16 TOTAL
Baby Food		
Bakery		
Canned/Preserved Food		

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Chilled Processed Food
Confectionery
Dairy
Dried Processed Food
Frozen Processed Food
Ice Cream
Meal Replacement
Noodles
Oils and Fats
Pasta
Ready Meals
Sauces, Dressings and Condiments
Snack Bars
Soup
Spreads
Sweet and Savoury Snacks
Impulse and Indulgence Products
Nutrition/Staples
Meal Solutions
Packaged Food

Source: EuromonltorInternationalfrom trade associations,trade press, company research, trade interviews, trade sources

DEFINITIONS

Explanations of words and/or terminology used in this report are as follows:

~ Alfajores: Categorised in Euromonitor data within chocolate confectionery (not biscuits). A type of chocolate-coated sandwich biscuit popular in Argentina consisting of two round sweet biscuits joined together with mousse, dulce de leche or jam and coated with black or white chocolate (many alfajores are sold in "black" and "white" flavours) or simply covered with powdered sugar.

~ Dulce de leche: caramel milk, prepared with condensed milk.

~ Asados: Considered a traditional dish in Argentina, an asado usually consists of beef alongside various other meats, which are cooked on a grill, called a parrilla, or open fire.

~ Greater Buenos Aires: The generic denomination to refer to the megalopolis comprising the autonomous city of Buenos Aires and the conurbation around it, over the province of Buenos Aires -namely the adjacent 24 partidos or municipalities - which nonetheless do not constitute a single administrative unit.

Sources used during research include the following:

Summary 16 Research Sources

Official Sources	Camara de Fabricantes de Pastas Alimenticias y Afines de la Provincia de Cordoba
	Food & Agricultural Organization of the United Nations
	Foreign Agricultural Service
	SAGPYA
	Subsecretaria de Agricultura & Ganaderia
Trade Associations	ADGYA

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	Agricultura, Ganaderia Pesca y Alimentos
	Camara Argentina de Especias y Afines
	Camara Argentina de Fabricantes de Helados Artesanales
	Centro de la Industria Lechera
	Coordinadora de las Industrias de Productos Alimenticios
	Fundacion Instituto de Desarrollo Rural
	Webretail
Trade Press	CAS & FASA
	Clarin
	Clarin
	Distribucion y Consumo
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	Negocios Magazine
	Pagina 12
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تلفن: ۸۸۳۴۹۱۱۲ دورنگار: ۸۸۳۴۹۴۳۲

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