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# **Argentina**

## **Retail Food Sector**

### **Report**

### **2002**

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#### **Report Highlights:**

**Hypermarkets and large supermarkets account for approximately half the sales of retail foods and beverages. There are ten large retailers, of which seven are large international companies, and a few locally-owned. As a result of the four-year recession and the strong devaluation of early 2002, large retailers are losing some market share in the hands of smaller stores, such as warehouse stores, small supermarkets and grocery stores. Imported foods and beverages are primarily sold through large supermarkets, but sales in 2002 dropped significantly as a consequence of the weakness of the Argentine Peso. The presidential elections of 2003 are expected to bring growth to the domestic economy and regain the market which Argentina once was.**

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Includes Trade Matrix: No  
Annual Report  
Buenos Aires [AR1], AR

## INTRODUCTION

After ten years of economic stability, which in great part was the result of the convertibility plan which pegged the peso to the dollar at 1:1, the Argentine Government devalued its currency in early 2002. This forced deep changes in the country's economy and society.

The main impact on the retail sector was: higher food prices in peso terms (especially tradeable products, local foods using imported inputs and imported products); lower food prices in dollar terms which encouraged many processors to export; a steep drop in domestic sales (measured in volume); a reduction in the size of packages; disappearance of many lines of products; appearance of old, discontinued products; increased sales of basic foods (flour, rice, etc.) and a drop in sales of higher-value products, such as frozen foods and imported products; and the increase of F&B sales in small markets, as consumers lost purchasing power and only buy essential, less expensive products and many times with credit provided by the owners of the stores.

In summary, the Argentine retail sector, after the devaluation, has lost much of what it gained in the past decade. However, most hope that after March 2003 presidential elections the country will shift gears and start to grow again. This is essential to recover the market which Argentines once enjoyed.

## SECTION I. MARKET SUMMARY

- < Argentine total retail sales of foods and beverages (F&B) for 2002 are estimated at roughly \$7.3 billion.
- < In 2002, hypermarkets and superstores accounted for 40 percent (down from 42 percent in 2001) of the total F&B sales; small supermarkets (including warehouse stores - locally known as *hard-discounts*) 30 percent (up from 28 percent in 2001); grocery stores 22 percent (19 percent in 2001); and convenience stores (CS), gas marts and kiosks 8 percent (11 percent in 2001) .
- < Hypermarkets and superstores are the retail formats which have most grown in the past decade. However, due to the economic recession in 1999/02, their market share has dropped in favor of smaller supermarkets, warehouse stores, and grocery stores.
- < On the one hand, warehouse stores offer lower-price products, i.e. private labels and B-Brands and, on the other hand, grocery stores provide credit to less affluent consumers.
- < Many international retail companies are operating in Argentina: Wal Mart, Ahold, Carrefour-Promodes, Casino, Auchan, Makro. Coto, Jumbo and La Anonima are the only large retailers which still have local ownership.
- < Strong competition and concentration in Buenos Aires city and suburbs. However, during the past few years, hypermarkets and superstores have expanded into the interior of the country through the purchase of smaller chains.
- < Warehouse stores continue to expand strongly, mainly because of competitive prices and

- proximity. Most large foreign retail companies are investing in this business to recover lost market share.
- < Large supermarket chains began losing money in 2001 and this downward trend continued throughout 2002. This is primarily the result of weaker demand as a consequence of the economic crisis, which contributed to deepen recession.
  - < Due to the economic recession, customers are demanding more inexpensive products. As a result, large retailers are increasingly launching private labels, B-brands and other low-price alternatives with increasing popularity. Supermarket private labels for F&B products account for approximately 10 percent of the total supermarket sales. There is at least one upscale superstore which is planning to launch a second private label addressed to less affluent consumers. There is a wide variety of F&B products sold under private label, such as canned fish and seafood, fresh and dried pasta, canned fruits and vegetables, mashed potatoes, gelatins, dairy products, bakery products, soft drinks, juices, beef, poultry, cold cuts, tea, coffee, and flour, among others.
  - < During the past few years, large retail companies had tremendous negotiating power, putting strong pressure on their suppliers, e.g. free stock for every new store inauguration, high slotting fees, financial support for marketing, longer payment terms of 60-120 days, etc. During 2002, they had to become more flexible since, after devaluation, local manufacturers became more competitive in foreign markets.
  - < In mid-2000 retailers and suppliers signed a mutual agreement called "Code of Good Marketing Practices", which prohibits retailers selling under cost price and debiting sums which have not been previously agreed upon, and shortens payment terms. Its result has been relatively good.
  - < F&B sales in hypermarkets and superstores account for approximately 70-72 percent of total sales.
  - < Approximately 70 percent of all imported F&B are sold through hypermarkets, superstores and supermarkets. Overall, imported products include those commodities which are not domestically produced, such as canned palm hearts, tuna fish and pineapple, and also canned corn, peas and tomatoes, counter-seasonal fruits (bananas, kiwifruit, grapes, watermelon, melon), a few confectionery products, some sauces, and isotonic beverages.
  - < After devaluation, F&B imports decreased drastically by approximately 65 percent and the number of domestically-produced items decreased by 20 percent. Meanwhile, there was a gradual import substitution with locally-manufactured products. Some large multinational food processing companies, which had moved factories to Brazil during the last couple of years in search of higher levels of competitiveness, have returned to produce in Argentina to take advantage of better opportunities and higher profitability for supplying export markets.

*Value of Imported Food and Beverage Retail Sales vs. Domestic Products (in \$ billion)*

Retail Sales/Year	1998	1999	2000	2001	2002*
<b>Imported F&amp;B</b>	0.94	0.94	1.08	1.00	0.30
<b>Domestic F&amp;B</b>	20.8	20.5	21.3	20.9	7.0
<b>Imp/Total F&amp;B Retail Sales %</b>	4.5	4.6	5.0	5.0	4.0

\* Due to the impact of the strong devaluation

*Trends in Distribution Channels*

- < Slower pace of opening of large stores compared to the past five years.
- < In 2003, it is expected an increase in sales in close-by superettes, warehouse and grocery stores, and a decrease in hypermarkets and superstores.
- < Relatively strong expansion of warehouse stores, especially in Buenos Aires city and in medium-sized cities in the interior. In 2002, they totaled around 300 stores. This format addresses low-income customers, has a high percentage of private label items, competitive prices and most of them offers home-delivery service.
- < Concentration through new openings, mergers and acquisitions is expected to continue but at a slower pace. Carrefour-Promodes bought Norte, Tia, and Dia, with joint F&B sales of about \$950 million and about 13 percent of the country's total F&B retail sales.
- < Another F&B retail format which is gaining popularity, especially for fresh products, is the open-air market. Currently, there are 12 in Buenos Aires City. The prices they offer are 30 percent lower than those in hypermarkets and superstores.
- < Most hypermarkets and superstores are designing strategies with their suppliers to begin exporting F&B products using their private labels to counteract the effects of the domestic recession.
- < Most purchases of domestically-produced items by hypermarkets and superstores are done directly from processors, avoiding intermediaries.
- < Superstores purchase imported F&B directly and through local agents/representatives.
- < F&B are imported primarily from Mercosur countries because of lower freight costs and zero tariffs for most goods.
- < Large retailers have modern centralized warehouses, whereas grocery stores and small supermarkets suffer from an inefficient and, in many cases, obsolete distribution and logistical systems.
- < Home and office delivery by retailers was quite popular during the past few years. However, it is becoming more restricted as service loses importance in the local price-driven market.
- < Internet and telephone sales are being used by a small percentage of more affluent consumers.

- < A majority of consumers are expected to continue to value price over quality, though value is becoming increasingly important among consumers with a higher purchasing power.
- < Wholesale clubs (Sam's and Makro's Kargo) have closed their stores as the format did not "catch on".
- < During 2002, there have been a few closings of convenience stores, especially those attached to gas stations as they usually offer convenience foods at higher prices than other retail stores. Moreover, consumption of convenience foods decreased drastically while cooking home-made meals is becoming more popular. This is a primary consequence of a lower purchasing power but also of a growing number of unemployed and underemployed individuals spending more time at home.
- < Supermarkets sell primarily non-perishable products, carbonated and alcoholic beverages, cold cuts, dairy products and cheese. Between 40-50 percent of meats and poultry are sold in supermarkets and the balance in traditional/specialized stores, while supermarkets have a relatively small market share of fruits, vegetables and bread sales.
- < The upper/middle-up socio-economic strata usually buy in hypermarkets since they value variety and service. They also make small purchases of fresh products in close-by smaller stores. The middle class usually shop in small supermarkets and warehouse stores. Lower-income consumers typically shop in traditional grocery stores. Nevertheless, during 2002, as a result of the economic crisis, a growing number of more affluent consumers are becoming more price-oriented, thus changing their shopping habits.

*Number and Type of Retail Outlets (2000)*

Type of Store	Number of Outlets	% of Total Outlets	% of F&B Retail Sales*
<b>Hypermarkets</b>	58	0.03	15
<b>Superstores</b>	1,248	0.7	29
<b>Small Supermarkets (incl. warehouse stores)</b>	13,002	6.8	26
<b>Grocery Stores</b>	93,615	49.1	19
<b>Convenience Stores</b>	5,063	2.7	4
<b>Kiosks</b>	77,756	40.1	7.0
<b>Total</b>	190,742	100	100

Source: ACNielsen

\* FAS estimate

Trends in Services Offered by Retailers

- < Incorporation of home meal replacement services, such as hot and frozen meals was becoming popular until the economic crisis hit the country in early 2002.
- < A few hypermarkets offer some ethnic and kosher food, and organic products, and also have a special area devoted for imported products, currently with a reduced variety of items.
- < Home and office delivery has been decreasing. Office delivery is mainly provided by kiosks and convenience stores.
- < A limited percentage of more affluent consumers do their shopping by phone and the Internet.
- < During the past few years, there were some openings of other food and non-food businesses annexed to hypermarkets and superstores, such as movie theaters, food quarters, entertainment parks, etc.
- < In addition, inexpensive fast food restaurants were incorporated inside the stores.

Outlook for U.S. Exports of Food & Beverage Products

Despite current economic difficulties which affected imports negatively, below are the strengths and weaknesses of U.S. food and beverage products:

ADVANTAGES	CHALLENGES
Argentine consumers think of U.S. products as high quality and reliable	Mercosur preferential tariffs encourage inter-regional trade. Brazilian and Chilean competition is strong for many products.
A large number of Argentines have traveled and studied in the U.S., exposing them to American culture and products. Exposure is also expanding through cable TV and the Internet.	Lack of brand awareness for many imported products by importers, retailers and consumers
Despite the current recession, some local retail chains keep a good variety of imported F&B on their shelves.	Lack of importers' and retailers' knowledge about purchasing and merchandising U.S. products
Most imported food is specialty and/or novelty in large retail and convenience stores	Relatively small initial purchases by importers, which discourage U.S. suppliers and increase unit costs
Efficiency, value and variety of U.S. F&B products	Large local supply of many F&B products
Hypermarket and superstore expansion in the interior permits good country coverage	Large foreign investment in the food industry during the last decade improved efficiency, quality, and competition

Large foreign retail chains have more opportunities to deal with foreign suppliers	Higher distribution costs to reach interior of the country and smaller cities
Registration for F&B imports and import procedures are usually relatively simple	Local importers perceive lack of flexibility and response from most U.S. exporters.
Greater use of U.S. consolidating companies, which facilitates imports of smaller volumes and a wider variety of products	Extremely high value of the dollar, which makes imported products more expensive and prompts food import substitution
Good local cold chain facilities allow imports of frozen and chilled products	Strong economic recession and unemployment limit sales
Better sanitary status compared to Europe	
Greater exposure of local retailers to U.S. exporters and products through FAS activities	
Improved U.S. labeling and packaging (better local acceptance)	

## SECTION II. ROAD MAP FOR MARKET ENTRY

### A. HYPERMARKETS OR SUPERCENTERS, SUPERSTORES AND WAREHOUSE OUTLETS

#### Entry Strategy

The best method to import a product will depend upon the product, the importer, and retailers. However, virtually all successful trade depends upon the commitment of the exporter to devote the time and resources necessary for building a market for his/her product(s). In general, imported F&B come into Argentina through any of the following ways:

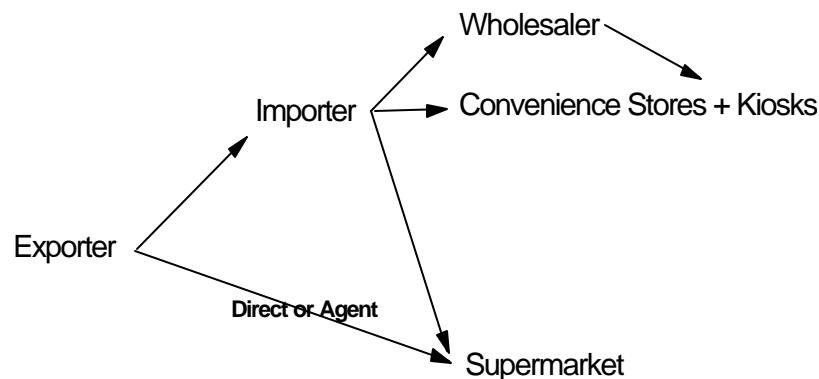
- Direct imports by supermarkets. Import or purchasing managers of large retail companies identify products in international food shows, buying missions, sales missions, etc. They establish a direct contact with the foreign supplier and import the products directly (this is the case of "commodity type" products - such as canned tuna, pineapple, sweet corn, etc). Also, some retailers, due to small initial volumes, use large wholesalers or consolidators to import mixed containers.
- Local agents, who work closely with large retail chains, usually present new products to purchasing managers in supermarkets. Imports are done on behalf of supermarkets and the agents charge a commission. They stay on top of the product to supervise its marketing and brand development. This is applicable to "commodity type" and products in general.

- Local food and beverage importers, who import products and then market them in supermarkets and/or HRI establishments. A few of them have been in the market for several years and have well-established brands. They mainly specialize in gourmet foods.

Local processors (mainly subsidiaries of multinational companies) such as Nestle, Parmalat, Procter and Gamble, Pepsico, Danone, Nabisco, Ferrero, etc., import and distribute products usually manufactured by their sister companies.

### Market Structure

#### Distribution Channel Flow Diagram Imported Foods & Beverages





Company Profiles (2001)

<b>Retailer</b>	<b>Ownership</b>	<b>Est. F&amp;B Sales \$ Million *</b>	<b>No. of Outlets</b>	<b>Locations</b>	<b>Purchasing Agent Type</b>
<b>Carrefour/ Norte/Tia/ Dia</b>	French	950	365	National	Direct, agent, importer
<b>Disco/Ahold</b>	Local/Dutch	450	236	National	Direct, agent, importer
<b>Coto</b>	Local	400	100	Buenos Aires/ Large Cities	Direct, agent, importer
<b>Jumbo</b>	Chilean	210	15	Buenos Aires/ Large Cities	Direct, agent, importer
<b>Libertad/ Casino</b>	Local/French	150	13	Center-North of Argentina	Direct, agent, importer
<b>La Anonima</b>	Local	150	89	Primarily South of Argentina	Direct, importer
<b>Wal Mart</b>	US	120	11	Buenos Aires/ Large Cities	Direct, agent, importer
<b>Toledo</b>	Local	65	18	S.E. Buenos Aires Province	Direct, agent, importer

- < Argentina has mainly the following retail store formats:
  - < hypermarkets (+5,000 sqm., +25 checkouts, driving distance)
  - < supermarkets (400/5,000 sqm., 4/25 checkouts, walking distance)
  - < small supermarkets or superettes (<400 sqm., less than 3 checkouts, proximity, delivery)
  - < warehouse stores (<500 sqm, proximity, 2-3 checkouts, low prices, 65 percent of private label products and B-brands, a few first-brands, 500-1,500 products, delivery)
- < Buenos Aires city and suburbs are covered by all four above formats.
- < Large cities (mainly provincial capitals) have primarily supermarkets and superettes, and several have hypermarkets.
- < Smaller cities (less than 100,000 people) have primarily superettes and some supermarkets.
- < Warehouse stores are growing in popularity. In 2001, they totaled almost 300 stores. Nowadays, 6 percent of the upper class, 11 percent of the middle class and 9 percent of the lower class shop in this type of stores.

- < Local hypermarket and superstore chains now offer a limited selection of imported products, mainly in stores located in the most affluent areas of Buenos Aires city and suburbs (where one third of the country's population lives, and almost half of the sales are done).
- < Approximately 80 percent of the upper class, 65 percent of the middle class and about 55 percent of the lower class shop in hypermarkets and superstores.

## *B. CONVENIENCE STORES, GAS MARTS, KIOSKS*

### Entry Strategy

- < The best method for new-to-market exporters is to enter the market through importers who have their own distribution networks, and to a lesser degree, through wholesalers.
- < It should be noted that participation in trade shows, especially SIAL Mercosur, and other professional trade shows foster contact between U.S. suppliers and importers primarily from the Mercosur region.
- < In general, a local representative is helpful to develop negotiations with retailers. Most food importers sell directly to this subsector.
- < Selling to gas-marts owned by oil companies should be addressed to their purchasing managers. In all other formats, convenience stores and kiosks, the decision is taken by each owner.

### Market Structure

Please refer to flow chart in Section II. A.

### Company Profiles

<b>Retailer Name</b>	<b>Ownership</b>	<b>F&amp;B Sales (\$ Million)</b>	<b>No. of Outlets</b>	<b>Locations</b>	<b>Purchasing Agent Type</b>
<b>EG3 (Petrobras)</b>	Brazilian	30	360	Nationwide	Importer/ distributor
<b>Esso Shop &amp; Minishop (Esso)</b>	U.S.	30	300	Nationwide	Importer/ distributor
<b>YPF (Repsol)</b>	Spanish	90	1000	Nationwide	Importer/ distributor
<b>Shell Shop (Shell)</b>	British/ Dutch	60	500	Nationwide	Importer/ distributor

Source: FAS estimate

- < Gas mart chains or convenience stores started operation in the early nineties as a separate division of oil companies. A high percentage of these outlets operates under franchising. Approximately 50 percent of gas stations includes convenience stores.
- < There are approximately 5,000 convenience stores all over the country. In 2001, they accounted for 4 percent of the total retail sales of F&B.
- < They are typically located within gas stations either in cities or highways, open 24 hours a day, and offer a wide variety of food products (approximately 2,000), such as frozen food, fast food, snacks, confectionery items, alcoholic and non-alcoholic beverages, dairy products, etc. They also include a gift area and an eating area with microwaves. Some gas marts have ATM machines.
- < Customers of convenience stores in cities, mostly youngsters, usually make purchases by impulse (e.g. confectionery items), or because of their proximity and the fact that they are open 24 hours a day. Customers of convenience stores in highways are primarily travelers.
- < Being open 24 hours a day and their relative security are some of the major attractive features of gas marts.
- < Convenience stores are expected to continue expanding and represent a good channel for imported F&B.
- < Convenience stores located in Buenos Aires City and suburbs account for more than half of the total sales of this format.
- < Over 50 percent of convenience store customers belong to middle class and 40 percent, to the upper/middle strata.
  
- < Kiosks are smaller than gas marts and they primarily sell confectionery products, snacks, cigarettes, soft drinks, ice cream, etc. They do not have eating areas, and most of them are family-run. Some kiosks have become drugstores (maxikiosks), with self-service shelves and a wider product variety.
- < There are over 70,000 kiosks in Argentina.
- < In 2001, kiosks accounted for 7 percent of the total retail sales of F&B products.
- < Kiosk customers belong to all socio-economic classes. Maxikiosks are popular among workers, who purchase inexpensive food, and students.
- < Larger kiosks are incorporating vending machines.
  
- < Most imported items sold in convenience stores and kiosks are chocolates, alcoholic beverages, and confectionery.
- < The location of convenience stores and kiosks in Argentina is mostly related to consumption patterns. Buenos Aires City and suburbs show a higher concentration of outlets (35 percent), followed by major cities such as Córdoba, Rosario, Mendoza, Tucumán, Mar del Plata, Bahía Blanca, Santa Fe, Paraná, Neuquén, and Salta.

*C. TRADITIONAL MARKETS - "MOM & POP" SMALL INDEPENDENT GROCERY STORES  
(including small supermarkets)*

*Entry Strategy*

- < The best method to enter the market is the same as for convenience stores (please refer to Section B).

*Market Structure*

Please refer to flow chart in Section II. A.

*Subsector Profile*

- < In 2001, traditional stores accounted for almost 46 percent of the total retail sales of F&B products. Around 15 years ago, traditional markets comprised 73 percent of the total sales of F&B products.
- < In the last decade, this subsector showed a gradual decline in favor of supercenters and superstores. However, as result of the economic crisis, sales in both grocery stores and small supermarkets are growing. Many customers prefer these due to its proximity, and to the fact that they make smaller buys and many times with short term credit.
- < Customers of traditional stores primarily belong to the middle and middle-low socio economic classes.
- < Almost 12 percent of the upper class, 22 percent of the middle class and about 30 percent of the lower class shop in traditional stores.
- < Their market share has gone up slightly due to the recession and growing unemployment, with more people buying with credit which is generally granted by the owners of the small grocery stores.
- < Only a small percentage of imported F&B is sold through traditional stores.

*SECTION III. COMPETITION*

- < Argentina is essentially a food-producing country.
- < Of all retail F&B sold in 2001, 5 percent was imported products.
- < Although volumes of imported F&B decreased significantly during the past few months due to devaluation and economic recession, there are still good opportunities for some U.S. consumer-ready food products due to their high quality.
- < Argentine companies also import some premium products because of their high quality and variety.
- < Food products are imported mainly from Mercosur countries (primarily Brazil and Chile) due to two main reasons: proximity, reduced preferential import tariffs and favorable exchange

rate. Imported products also come from Ecuador, European countries (especially Spain, France, Italy, and Germany) and the United States.

*The following table lists the advantages and disadvantages of both local and imported F&B products*

	<b>ADVANTAGES</b>	<b>DISADVANTAGES</b>
Locally Produced	<ul style="list-style-type: none"> <li>* established products</li> <li>* established brands</li> <li>* established manufacturers</li> <li>* adapted to local preferences</li> <li>* fresher/longer shelf-life</li> <li>* less expensive</li> <li>* wide distribution</li> <li>* strong marketing support</li> </ul>	<ul style="list-style-type: none"> <li>* not always the best quality</li> <li>* slower in introducing new novelty products</li> <li>* expensive slotting fees</li> <li>* limited selection</li> </ul>
Imported	<ul style="list-style-type: none"> <li>* quality</li> <li>* novelty</li> <li>* availability (in case of products with limited local production)</li> <li>* variety</li> <li>* good image</li> <li>* improved and more attractive packagings</li> </ul>	<ul style="list-style-type: none"> <li>* generally more expensive</li> <li>* shorter shelf-life (by the time it arrives)</li> <li>* different taste</li> <li>* poor or no marketing support</li> <li>* distribution limitations (run out of stocks)</li> <li>* importation costs</li> </ul>

*The following is a brief description of the market per major retail product categories*

- < Snack food of U.S. origin has a very good reputation, but its demand has dropped significantly after the devaluation. The main market player in Argentina is PepsiCo, which holds over 70 percent of the Argentine snack food market. They produce locally many U.S. brands.
- < Domestic production of breakfast cereals is also very significant. U.S.-owned companies established in Argentina (Kellogg's, Quaker and General Cereals) lead the market. However, some varieties are still imported from Brazil, the U.S. and Mexico. Disco supermarket imports from the United States for their private label. Consumption stopped growing after the economic crisis.
- < Argentina produces and exports large volumes of beef. Thus, imports are not significant although some sweetbreads were imported from the United States until early 2002, when Argentina established new sanitary regulations banning imports. Imported pork accounted for approximately half the domestic demand until 2001. However, the economic crisis has forced its reduction to very low volumes. Product comes primarily from Brazil. Although Argentina's poultry production capacity is well under-used, some inexpensive products are imported from Brazil.
- < Argentina is self-sufficient in dairy production and exports high quality products to many markets. However, some imports of whey, special milks and specialty cheeses take place.

- < There are large imports of preserved fish and seafood specialties (primarily canned tuna), coming from Ecuador, Thailand, and Brazil.
- < Some fruits which are not produced locally are imported, such as bananas (Brazil and Ecuador), and Kiwis (Chile and Italy). There are imports of canned fruits, especially pineapple from Thailand, S. Africa and Indonesia, which is not produced locally. Canned palm hearts are also imported in good quantities from Ecuador and Brazil.
- < Argentine imports of tree nuts (primarily almonds and walnuts) have dropped as a result of the economic downturn. Of the imported ones, Chile dominates the market by far, followed by the US.
- < Imports of soft drinks and mineral water have become insignificant. There are large local manufacturers, including Coca Cola and Pepsico, which compete strongly in the market. Brazil continues to be the number one supplier of imported beer, but volumes have dropped dramatically after the devaluation. Quilmes, a local beer brand accounts for more than 70 percent of the market. Wine imports have almost disappeared after the devaluation.
- < Argentina has expanded its pet food production, especially after the opening of several manufacturing plants owned by foreign companies such as Procter & Gamble, Nestle/Purina, Heinz, Mars/Effem and Colgate Palmolive, who have established in the country in the last few years. However, some *premium* pet food is imported, primarily from the United States, followed by Brazil.

#### SECTION IV. BEST PRODUCT PROSPECTS

The best product prospects for U.S. F&B in the Argentine retail market are as follows:

Product Type	Pcts Present in the Market w/Good Sales Potential	Pcts not Present in Significant Quantities but w/Good Sales Potential	Pcts not Present because They Face Significant Barriers	Barriers
Pork/Ham	X			
Preserved Fish	X			
Chocolate	X			
Canned Veggies.	X			
Fruit & Nut Prep.	X			
Frozen/Fresh Fish and Molluscs	X			
Sugar Confection.	X			

Beer	X			
Fresh Citrus	X			***
Sauces & Prep.	X			
Bakery Products	X			
Isotonic Bvgs.	X			
Fresh Stone Fruits	X			***
Fr. Deciduous Fruits	X			***
Fresh Grapes	X			***
Sparkling Wine	X			

\*\*\* Please contact our office for current phytosanitary regulations

*SECTION V. POST CONTACT AND FURTHER INFORMATION*

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