

## **Soft Drinks in Uruguay**

Market Direction | 2025-01-14 | 69 pages | Euromonitor

## **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### Report description:

Soft drinks in Uruguay has demonstrated significant resilience and adaptability in recent years, withstanding both economic and environmental challenges. The nation has maintained stable economic growth despite facing the ripple effects of Argentina's economic turmoil, achieving a positive trajectory throughout 2023. The prolonged drought, one of the most severe in recent history, profoundly influenced consumer behaviour and the soft drinks market. This climate event, which persisted until Septe...

Euromonitor International's Soft Drinks in Uruguay report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2020-2024), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2029 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

#### **Table of Contents:**

Soft Drinks in Uruguay Euromonitor International January 2025

List Of Contents And Tables

SOFT DRINKS IN URUGUAY

**EXECUTIVE SUMMARY** 

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 ∏Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 ☐Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 [Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 ☐NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 16 []LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 17 []NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 18 [LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 19 | Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 20 [Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 21 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 22 | Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 23 | Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 24 [Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 25 [Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 26 [Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 27 [Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 28 | Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 29 [Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 30 ☐Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 31 [Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 32 [Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

**DISCLAIMER** 

**SOURCES** 

Summary 1 Research Sources

CARBONATES IN URUGUAY

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Residual impact of the water crisis has diminished growth in carbonates

Reduced-sugar variants have excelled due to innovation and discounts

Local players have strengthened their position in affordable carbonates

PROSPECTS AND OPPORTUNITIES

Climate change and sugar concerns could limit future growth in carbonates

Non-cola flavours may gain momentum through use as mixers

Private label and local brands will likely retain popularity among budget consumers

**CATEGORY DATA** 

Table 33 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 34 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 35 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 36 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 37 Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 38 Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 39 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 40 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 41 Sales of Carbonates by Total Fountain On-trade: Volume 2019-2024

Table 42 ∏Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2019-2024

Table 43 ☐NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 44 ∏LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 45 ☐NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 46 [LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 47 ☐Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 48 [Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 49 ∏Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 50 [Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 51 [Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2024-2029

Table 52 | Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2024-2029

**JUICE IN URUGUAY** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Sluggish juice sales amidst lingering distrust in tap water

Health and wellness trends drive reduced sugar juice variants

The Coca-Cola Company expands with innovative launches

PROSPECTS AND OPPORTUNITIES

Health-conscious consumption to fuel growth

Vegetable-infused juices expected to gain momentum

Affordability and value-packaged juice drinks to drive sales

**CATEGORY DATA** 

Table 53 Off-trade Sales of Juice by Category: Volume 2019-2024

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 54 Off-trade Sales of Juice by Category: Value 2019-2024

Table 55 Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 56 Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 57 NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 58 LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 59 NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 60 LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 61 Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 62 ☐Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 63 [Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 64 [Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

**BOTTLED WATER IN URUGUAY** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Residual effects of the water crisis and market adjustments

Growth of flavoured bottled water

Recovery by leading bottled water brands

PROSPECTS AND OPPORTUNITIES

Sustainability of bottled water amidst climate change and health trends

Expansion of home delivery and family pack offerings

Challenges posed by tap water filters

**CATEGORY DATA** 

Table 65 Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 66 Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 67 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 68 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 69 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 70 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 71 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 72 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 73 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 74 ∏Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 75 ☐Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 76 [Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

SPORTS DRINKS IN URUGUAY

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Expanding consumption occasions propel sports drink growth

Introduction of SueroX redefines the product area with oral replenishment solutions

Gatorade retains leadership amid rising competition from Powerade

PROSPECTS AND OPPORTUNITIES

Functionality and climate trends to sustain growth

Oral replenishment innovations set to diversify consumption occasions

Premium pricing may limit accessibility to broader audiences

**CATEGORY DATA** 

Table 77 Off-trade Sales of Sports Drinks: Volume 2019-2024 Table 78 Off-trade Sales of Sports Drinks: Value 2019-2024

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 79 Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 80 Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 81 NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 82 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 83 NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 84 LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 85 Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 86 [Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 87 [Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 88 | Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

**ENERGY DRINKS IN URUGUAY** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Energy drinks? growth slows amid contraband challenges from Argentina

Monster leads concentrates, driven by competitive pricing and brand appeal

Reduced-sugar energy drinks gain momentum amid health concerns

PROSPECTS AND OPPORTUNITIES

Expansion driven by new entrants and enhanced distribution

Intensified marketing investments to propel category growth

Emerging trends in low-calorie and plant-based energy drinks

**CATEGORY DATA** 

Table 89 Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 90 Off-trade Sales of Energy Drinks: Value 2019-2024

Table 91 Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 92 Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 93 NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 94 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 95 NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 96 LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 97 Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 98 [Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 99 [Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 100 [Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

**CONCENTRATES IN URUGUAY** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Distrust in tap water and shifts to flavoured water impact concentrates

Liquid concentrates gain traction from a small base

Price competition and market shifts challenge key players

PROSPECTS AND OPPORTUNITIES

Addressing counterfeit products to boost market recovery

Reformulating powder concentrates for health-conscious consumers

Expanding localised and functional flavour innovations

**CATEGORY DATA** 

**Concentrates Conversions** 

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 101 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 102 Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 103 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 104 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 105 NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2020-2024

Table 106 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 107 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 108 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 109 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 110 [LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 111 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 112 ∏LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 113 ∏Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 114 ∏Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 115 ∏Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 116 ∏Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

RTD TEA IN URUGUAY

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Moderate growth amidst limited popularity

Premium positioning limits broader appeal

Imported brands dominate RTD tea

PROSPECTS AND OPPORTUNITIES

Growth driven by premium positioning

Health and wellness trends offer growth potential

Innovation in functional and flavour profiles

#### **CATEGORY DATA**

Table 117 Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 118 Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 119 Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 120 Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 121 NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 122 LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 123 NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 124 LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 125 Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 126 [Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 127 [Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 128 ∏Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

RTD COFFEE IN URUGUAY

2024 DEVELOPMENTS



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$  - Complete the relevant blank fields and sign

# **Soft Drinks in Uruguay**

Market Direction | 2025-01-14 | 69 pages | Euromonitor

Select license	License				Price
	Single User Licence				€2150.00
	Multiple User License (1 Site)				€4300.00
	Multiple User License (Global)			€6450.00	
	VAT				
				Total	
mail*		Phone*			
		Phone* Last Name*			
irst Name*					
irst Name* ob title*			/ NIP number*		
First Name* ob title* Company Name*		Last Name*	/ NIP number*		
First Name* ob title* Company Name* Address*		Last Name*  EU Vat / Tax ID	/ NIP number*		
Email*  First Name*  Job title*  Company Name*  Address*  Zip Code*		Last Name*  EU Vat / Tax ID /	/ NIP number* [		

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com