



**Euromonitor
International**

Consumer Health in Uruguay

October 2025

Table of Contents

Consumer Health in Uruguay

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for consumer health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

DISCLAIMER

DEFINITIONS

SOURCES

Summary 1 - Research Sources

Analgesics in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Improved performance as cross-border purchases decline

Gramon Bago Uruguay retains leadership, underpinned by wide portfolio and investment in new product development

Pharmacies control sales while e-commerce gains share

PROSPECTS AND OPPORTUNITIES

Dengue outbreak may boost demand for acetaminophen

Herbal/traditional products may benefit from growing interest in natural alternatives

E-commerce presents opportunities to boost analgesic consumption

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable medicated confectionery leads growth

CAS Uruguay SA dominates sales

Pharmacies capture lion's share of sales, as online channels gain ground

PROSPECTS AND OPPORTUNITIES

Market will maintain steady growth

Rising incidence of allergies, driven by changing rainfall patterns and temperature fluctuations

Local and international pharmacies will maintain key role

CATEGORY DATA

Table 18 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 19 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 21 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 22 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 23 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Dermatologicals see healthy growth due to impact of climate change and cross-border price dynamics

Megalabs continues to lead sales

Pharmacies dominate while online channels gain strength

PROSPECTS AND OPPORTUNITIES

Dermatologicals poised for further growth

Sustainability could be key driver in dermatologicals

Omnichannel approach will be key to future growth

CATEGORY DATA

Table 24 - Sales of Dermatologicals by Category: Value 2020-2025

Table 25 - Sales of Dermatologicals by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Dermatologicals: % Value 2021-2025

Table 27 - LBN Brand Shares of Dermatologicals: % Value 2022-2025

Table 28 - Forecast Sales of Dermatologicals by Category: Value 2025-2030

Table 29 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Digestive remedies see further growth, driven by changing dietary habits

Megalabs leads through broad product portfolio and strong distribution

Pharmacies remain dominant amid steep rise in online sales

PROSPECTS AND OPPORTUNITIES

Digestive remedies will retain important role, driven by laxatives and antacids
Herbal digestive remedies will benefit from shift towards natural offerings
Online sales will continue to grow, driven by affordability and convenience

CATEGORY DATA

Table 30 - Sales of Digestive Remedies by Category: Value 2020-2025

Table 31 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025

Table 32 - NBO Company Shares of Digestive Remedies: % Value 2021-2025

Table 33 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025

Table 34 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030

Table 35 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Wound Care in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wound care sales rise for second consecutive year, as small-scale smuggling declines
Johnson & Johnson leads with Band-Aid amid growing competition from lower-priced alternatives
Pharmacies capture bulk of sales but lose ground to e-commerce

PROSPECTS AND OPPORTUNITIES

Slower growth in face of negative demographic trends
Opportunity for emerging brands in a price sensitive market
Online sales presence will prove vital

CATEGORY DATA

Table 36 - Sales of Wound Care by Category: Value 2020-2025

Table 37 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 38 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 39 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 40 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 41 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports nutrition maintains growth amid supply constraints
Edatir leads fragmented market
Pharmacies lose ground to e-commerce and specialist stores

PROSPECTS AND OPPORTUNITIES

Further growth expected, driven by a widening consumer base
Prices hikes and protein shortages may hinder growth
Non-protein offerings will see fastest growth, driven by increased endorsement of creatine by key opinion leaders

CATEGORY DATA

Table 42 - Sales of Sports Nutrition by Category: Value 2020-2025

Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025

Table 44 - NBO Company Shares of Sports Nutrition: % Value 2021-2025

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025

Table 46 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Robust growth in 2025, with probiotics leading the way
- Megalabs SA strengthens leadership through Quelat portfolio acquisition
- Pharmacies leads sales despite intensified competition from direct sellers and e-commerce

PROSPECTS AND OPPORTUNITIES

- Dietary supplements to continue growing as consumers embrace preventive health
- Probiotics and new magnesium options may fuel additional growth
- Demand for protein supplements will be driven by older consumers

CATEGORY DATA

- Table 48 - Sales of Dietary Supplements by Category: Value 2020-2025
- Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025
- Table 50 - Sales of Dietary Supplements by Positioning: % Value 2020-2025
- Table 51 - NBO Company Shares of Dietary Supplements: % Value 2021-2025
- Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025
- Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030
- Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Sales continue to grow, albeit at slower pace, due to supply constraints
- Bayer SA Uruguay reinforces its presence while Abbott Laboratorios loses ground
- Pharmacies lose ground against rise of direct sellers, supermarkets and e-commerce

PROSPECTS AND OPPORTUNITIES

- Sales to increase, driven by rising interest in preventive health
- Direct sellers poised to gain momentum through affordability and personalised service
- E-commerce will offer consumers greater choice, more detailed information and convenience

CATEGORY DATA

- Table 55 - Sales of Vitamins by Category: Value 2020-2025
- Table 56 - Sales of Vitamins by Category: % Value Growth 2020-2025
- Table 57 - Sales of Multivitamins by Positioning: % Value 2020-2025
- Table 58 - NBO Company Shares of Vitamins: % Value 2021-2025
- Table 59 - LBN Brand Shares of Vitamins: % Value 2022-2025
- Table 60 - Forecast Sales of Vitamins by Category: Value 2025-2030
- Table 61 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Expanding consumer base drives continued growth
- Abbott consolidates its lead on back of increased investment in Ensure

Direct sellers retain importance while grocery retailers gain ground

PROSPECTS AND OPPORTUNITIES

Direct sellers expected to embrace multi-channel strategies to regain lost ground

GLP-1 slimming drugs may pose challenge to traditional weight loss supplements

New formulations with natural ingredients may see increasing demand

CATEGORY DATA

Table 62 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 63 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 64 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 65 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 67 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Robust growth, driven by preventive health trends

Megalabs maintains a comfortable lead

Pharmacies' strong presence is challenged by direct sellers

PROSPECTS AND OPPORTUNITIES

Further growth expected as consumers seek chemical-free products

Ageing population will continue to drive adoption

Sustainability will become major driver of impulse sales

CATEGORY DATA

Table 68 - Sales of Herbal/Traditional Products: Value 2020-2025

Table 69 - Sales of Herbal/Traditional Products: % Value Growth 2020-2025

Table 70 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 71 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 72 - Forecast Sales of Herbal/Traditional Products: Value 2025-2030

Table 73 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2025-2030

Paediatric Consumer Health in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Further growth in 2025, driven by rising local players and preventive health trends

Bayer gains ground in vitamins

Pharmacies retain dominant presence

PROSPECTS AND OPPORTUNITIES

Low birth rate in Uruguay could present threat to further growth

Rising focus on paediatric health could boost market potential

Generics will continue to target lower-income consumers

CATEGORY DATA

Table 74 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-health-in-uruguay/report.