Euromonitor International

Soft Drinks in Uruguay

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Soft Drinks in Uruguay

EXECUTIVE SUMMARY

Improved economic environment drives soft drinks growth in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Residual effects of the water crisis persist
Health and wellness trend boosts consumption of 100% juice
Functional beverages gain traction

WHAT'S NEXT?

Moderate growth expected
Health and wellness trend expected to play an increasingly important role
Impact of climate change

COMPETITIVE LANDSCAPE

The Coca-Cola Company retains its lead in 2025
Danone remains a dominant force in bottled water

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Ongoing impact of drought and water quality issues

INDUSTRY PERFORMANCE

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Still purified bottled water attracts consumers with its lower unit prices

WHAT'S NEXT?

Climate change and health and wellness trend support strong growth
Expansion of home delivery and family pack offerings
Tap water filters may pose a challenge

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Consumer preference for bottled water
Strengthening mixology trend benefits tonic water/mixers/other bitters

WHAT'S NEXT?

Sugar concerns could hamper the development of carbonates
Non-cola flavours are set gain momentum, driven by flavour and functional versions
Private label and local brands will likely retain popularity among budget consumers

COMPETITIVE LANDSCAPE

Montevideo Refrescos SA dominates with its iconic brands
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INDUSTRY PERFORMANCE

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Liquid concentrates benefit from Argentine migrants settling in Uruguay

WHAT'S NEXT?

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Reformulating powder concentrates for health-conscious consumers
Expanding localised and functional flavour innovations

COMPETITIVE LANDSCAPE

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Juice records strong growth as consumers focus on healthier beverages
100% juice benefits from consumers' preference for natural products free from additives and added sugar

WHAT'S NEXT?

Heightened health awareness to drive sustained growth
Vegetable-infused juices expected to gain momentum
Affordability and value-packaged juice drinks to drive sales

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Moderate growth amidst limited popularity

WHAT'S NEXT?

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Increasing health and wellness trend may attract new consumers
Functional properties and innovative flavours could stimulate consumer interest

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Double-digit growth supported by an increase in promotion and advertising activity
Rising health consciousness drives demand for reduced sugar energy drinks

WHAT'S NEXT?

Flavour innovation, the entry of new players, and enhanced distribution to drive consumption
Substantial marketing investment to propel category growth
Low-calorie and plant-based energy drinks may emerge in the coming years

COMPETITIVE LANDSCAPE

Monster leads, benefiting from Coca-Cola's extensive distribution network and effective marketing
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INDUSTRY PERFORMANCE

Robust growth fuelled by innovation and new consumption occasions
Innovative SueroX drives growth of reduced sugar sports drinks

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Health trend and climate change set to support sales
Oral replenishment beverages will widen the consumers base and add new consumption occasions
Premium pricing may limit accessibility to broader audience

COMPETITIVE LANDSCAPE

Gatorade retains its leadership amid rising competition from Powerade

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