



Euromonitor
International

Tea in Uruguay

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Tea in Uruguay - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health-driven consumption and functional innovation strengthened momentum across the tea category

INDUSTRY PERFORMANCE

Tea sales increased as wellness priorities reshaped consumption habits

Herbal/traditional medicinal tea remained the most dynamic segment as functionality guided consumer choices

WHAT'S NEXT?

Tea expected to maintain a favourable long-term outlook supported by rising wellness engagement

Health-focused innovation, premium botanical blends and evolving consumer rituals to support category expansion

On-trade expansion and the rise of speciality tea shops to reinforce consumer interest

COMPETITIVE LANDSCAPE

José Aldao SA remained the leading company amid rising competitive pressure from functional specialists

Supermercados Disco SA emerged as the most dynamic company as private label gained traction

CHANNELS

Small local grocers remained the leading channel, while modern retail expanded aggressively across the country

E-commerce was the most dynamic channel as digitalisation reshaped shopping behaviours

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Hot Drinks in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Hot drinks performance supported by economic stability and improving consumer sentiment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Category recovery strengthened as water-quality concerns eased and innovation increased

Climate pressures reshaped global coffee sourcing, but café culture compensated locally

Tea benefited from wellness and natural positioning despite seasonal limitations

WHAT'S NEXT?

Hot drinks expected to stabilise with gradual shifts in category composition

Wellness, natural ingredients and reformulation will drive tea and flavoured powder drinks trends

Premium coffee formats to gain relevance as consumers seek higher-quality experiences

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA maintained strong leadership supported by broad coverage and global capabilities
Supermercados Disco SA was the most dynamic performer due to private label expansion

CHANNELS

Supermarkets remained dominant as consolidation reshaped the retail landscape
E-commerce expanded rapidly due to delivery apps and marketplace penetration
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