Euromonitor International

Concentrates in Uruguay

January 2026

Table of Contents

Concentrates in Uruguay - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

A positive year, yet challenges persist

INDUSTRY PERFORMANCE

Concentrates recover; however, continue to face competition from healthier beverages
Liquid concentrates benefit from Argentine migrants settling in Uruguay

WHAT'S NEXT?

Further growth expected if government tackles counterfeit products
Reformulating powder concentrates for health-conscious consumers
Expanding localised and functional flavour innovations

COMPETITIVE LANDSCAPE

Leading Mondelez loses ground to counterfeit products and economy brands
Van Dam strengthens its position in 2025

CHANNELS

Small local grocers dominated sales but losing ground against e-commerce
Supermarkets strengthen their omnichannel capabilities
Concentrates Conversions
Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
Table 2 - Off-trade Sales of Concentrates by Category: Value 2020-2025
Table 3 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
Table 5 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
Table 6 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
Table 7 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
Table 8 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
Table 9 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
Table 10 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
Table 11 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
Table 12 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
Table 15 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
Table 16 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

Soft Drinks in Uruguay - Industry Overview

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

CHANNELS

Supermarkets lead, expanding their presence across Uruguay
Retail e-commerce set to experience rapid growth
Foodservice vs retail split

MARKET DATA

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 26 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 27 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 28 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 29 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 30 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/concentrates-in-uruguay/report.