

Beer in Uruguay

June 2023

Table of Contents

KEY DATA FINDINGS

2022 DEVELOPMENTS

Growing participation of imported brands stemming from macroeconomic issues
Trade union conflict in the industry forces FNC to go backwards on key decision
Domestic brands lead the category despite the advance of imported labels

PROSPECTS AND OPPORTUNITIES

Domestic brands will continue to lose share on retailers' shelves
Niche beer segments such as non alcoholic beers will perform strongly
On-trade channels set to post further increases

CATEGORY BACKGROUND

Lager price band methodology
Summary 1 - Lager by Price Band 2022
Table 1 - Number of Breweries 2017-2022

CATEGORY DATA

Table 2 - Sales of Beer by Category: Total Volume 2017-2022
Table 3 - Sales of Beer by Category: Total Value 2017-2022
Table 4 - Sales of Beer by Category: % Total Volume Growth 2017-2022
Table 5 - Sales of Beer by Category: % Total Value Growth 2017-2022
Table 6 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022
Table 7 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022
Table 8 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 9 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022
Table 10 - GBO Company Shares of Beer: % Total Volume 2018-2022
Table 11 - NBO Company Shares of Beer: % Total Volume 2018-2022
Table 12 - LBN Brand Shares of Beer: % Total Volume 2019-2022
Table 13 - Forecast Sales of Beer by Category: Total Volume 2022-2027
Table 14 - Forecast Sales of Beer by Category: Total Value 2022-2027
Table 15 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027
Table 16 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Alcoholic Drinks in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
On-trade vs off-trade split
What next for alcoholic drinks?

MARKET BACKGROUND

Legislation
Legal purchasing age and legal drinking age
Drink driving
Advertising
Smoking ban
Opening hours
On-trade establishments

TAXATION AND DUTY LEVIES

Table 17 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 18 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 19 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 20 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 21 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 25 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 26 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 27 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 28 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 29 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 30 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 31 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 32 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 33 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

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/beer-in-uruguay/report.

