



Rice, Pasta and Noodles in Uruguay

November 2025

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2025 DEVELOPMENTS

Current value growth dips as retail volume sales continue to contract

INDUSTRY PERFORMANCE

Declining trend in rice and pasta consumption persists in 2025

Instant noodle pouches is the fastest expanding category

WHAT'S NEXT?

Rice and pasta retail volume sales expected to return to growth from 2026

Outlook is brightest for noodles

Healthier alternatives set to gain ground in all categories

COMPETITIVE LANDSCAPE

Darcel, Coopar and Molinos Arroceros Nacionales remain the top three players

Leopoldo Gross & Asoc is the most dynamic company

CHANNELS

Supermarkets still the top distribution channel

E-commerce shows the fastest growth in current value sales

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Staple Foods in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Current value growth dips while retail volume sales decline slightly

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Reduction in cross-border shopping continues to buoy demand
Uruguayans show growing preference for healthier staple foods

WHAT'S NEXT?

Outlook for staple foods is generally positive
Private label lines set to continue gaining ground

COMPETITIVE LANDSCAPE

Soldo Hnos SA and Pontyn SA remain the top two players in staple foods
Leopoldo Gross & Asoc SA is the most dynamic company in value growth terms

CHANNELS

Food/drink/tobacco specialists remains the leading distribution channel
Penetration of e-commerce continues to rise

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