



**Euromonitor
International**

Cooking Ingredients and Meals in Uruguay

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Cooking Ingredients and Meals in Uruguay

EXECUTIVE SUMMARY

Upward pressure on unit prices boosts current value sales growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Cross-border shopping trips to Argentina become less economical

Consumer choices increasingly shaped by health concerns

Private label products continue to gain popularity

WHAT'S NEXT?

Outlook for cooking ingredients and meals remains bright

Frozen ready meals and chili sauces expected to be the most dynamic categories

Consumption of dried ready meals and packaged soup set to continue declining

COMPETITIVE LANDSCAPE

Cía Oleaginosa Uruguaya SA (COUSA) maintains overall lead

Los Ranchos Srl is the most dynamic company in value growth terms

CHANNELS

Supermarkets remains the most important distribution channel

Penetration of e-commerce continues to rise

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Current value sales rebound strongly amidst elevated pricing pressures

INDUSTRY PERFORMANCE

Demand for soy oil slows as prices increase and alternatives gain popularity

Olive oil posts the fastest growth in retail volume and current value sales

WHAT'S NEXT?

Overall demand expected to remain solid
Rising health-consciousness will continue to boost olive oil consumption
Limited scope for innovation in edible oils

COMPETITIVE LANDSCAPE

COUSA maintains impressive overall lead
Leopoldo Gross & Asoc SA is the most dynamic performer

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value sales decline while retail volume growth remains marginal

INDUSTRY PERFORMANCE

Demand for dried ready meals and dry and shelf stable soup continues to fall
Frozen ready meals is the best performing category

WHAT'S NEXT?

Outlook for individual categories remains mixed
Health concerns should spur new launches and reformulation of existing products
Frozen ready meals ranges will continue to diversify beyond empanadas

COMPETITIVE LANDSCAPE

Frigorifico Tacuarembó SA remains the leading company
Cooperativa Nacional de Productores de Leche is the star performer

CHANNELS

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KEY DATA FINDINGS

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Overall demand for sauces, dips and condiments remains buoyant

INDUSTRY PERFORMANCE

Most categories continue to show robust growth in volume and current value sales
Increasing popularity of Asian cuisine boosts consumption of soy sauces

WHAT'S NEXT?

Sauces, dips and condiments retains solid growth prospects
Chili sauces expected to be the fastest developing category
Health-oriented options likely to feature prominently among new launches

COMPETITIVE LANDSCAPE

Unilever remains the clear leader
COUSA is the best performing company

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand slows from 2024 but remains resilient on the whole

INDUSTRY PERFORMANCE

Chocolate spreads grows fastest in retail volume terms

Supply shortages and rising prices continue to depress honey consumption

WHAT'S NEXT?

All categories projected to develop positively in volume and value terms

Demand for honey should rebound quickly as domestic production recovers

Jams and preserves producers will continue to favour thin wall plastic containers

COMPETITIVE LANDSCAPE

Los Nietitos SA continues to dominate sweet spreads

Van Dam SA is the most dynamic company in 2025

CHANNELS

Distribution is concentrated in small local grocers and supermarkets

E-commerce is the fastest developing channel

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