



Spirits in Uruguay

July 2022

Table of Contents

Spirits in Uruguay - Category analysis

KEY DATA FINDINGS

2021 DEVELOPMENTS

Spirits posts robust growth in off- and on-trade volume sales

Whiskies, bitters and grappamiel remain the most popular product types

FNC takes over distribution of Fernet-Branca from Carrau

PROSPECTS AND OPPORTUNITIES

Healthy growth in total volume sales expected throughout the forecast period

Bitters likely to remain among the best performing categories

Premiumisation should continue to boost current value growth across spirits

CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2016-2021

Table 2 - Sales of Spirits by Category: Total Value 2016-2021

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 4 - Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

Table 9 - GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 10 - NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 11 - LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 12 - Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 13 - Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 14 - Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 15 - Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

Alcoholic Drinks in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

2021 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

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2021

OPERATING ENVIRONMENT

Contraband/parallel trade
Duty free
Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 16 - Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 17 - Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 18 - Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 19 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 20 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 21 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 25 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 26 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 27 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020

Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

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/spirits-in-uruguay/report.