Hot Drinks in Uruguay

December 2025

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Hot Drinks in Uruguay

EXECUTIVE SUMMARY

Hot drinks performance supported by economic stability and improving consumer sentiment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Category recovery strengthened as water-quality concerns eased and innovation increased

Climate pressures reshaped global coffee sourcing, but café culture compensated locally

Tea benefited from wellness and natural positioning despite seasonal limitations

WHAT’S NEXT?

Hot drinks expected to stabilise with gradual shifts in category composition

Wellness, natural ingredients and reformulation will drive tea and flavoured powder drinks trends

Premium coffee formats to gain relevance as consumers seek higher-quality experiences

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA maintained strong leadership supported by broad coverage and global capabilities

Supermercados Disco SA was the most dynamic performer due to private label expansion

CHANNELS

Supermarkets remained dominant as consolidation reshaped the retail landscape

E-commerce expanded rapidly due to delivery apps and marketplace penetration

Foodservice vs retail split

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Coffee demand strengthened despite global supply pressures and rising consumer expectations

INDUSTRY PERFORMANCE

Coffee retail sales increased as premiumisation and café culture expanded

Fresh ground coffee pods remained the fastest-growing segment thanks to premiumisation and accessibility

WHAT'S NEXT?

Coffee expected to sustain long-term growth as consumers gradually shift from yerba mate

Pod systems set to accelerate as compatible brands expand and premium formats gain reach

Digital channels and direct-to-consumer platforms to reshape access and assortment

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA strengthened its leading position through portfolio breadth and global backing

Vanacity SA (Illy) emerged as the most dynamic player thanks to premium positioning

CHANNELS

Supermarkets remained the dominant channel as retail consolidation expanded access

E-commerce was the most dynamic channel fuelled by delivery apps and direct-to-consumer expansion

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INDUSTRY PERFORMANCE

Tea sales increased as wellness priorities reshaped consumption habits

Herbal/traditional medicinal tea remained the most dynamic segment as functionality guided consumer choices

WHAT'S NEXT?

Tea expected to maintain a favourable long-term outlook supported by rising wellness engagement

Health-focused innovation, premium botanical blends and evolving consumer rituals to support category expansion

On-trade expansion and the rise of speciality tea shops to reinforce consumer interest

COMPETITIVE LANDSCAPE

José Aldao SA remained the leading company amid rising competitive pressure from functional specialists

Supermercados Disco SA emerged as the most dynamic company as private label gained traction

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Small local grocers remained the leading channel, while modern retail expanded aggressively across the country

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Category performance shaped by yerba mate maturity and emerging innovation in functional plant-based blends

INDUSTRY PERFORMANCE

Category performance reflected stable demand for yerba mate alongside demographic and dietary challenges

Flavoured and functional yerba mate emerged as the most dynamic area, driven by wellness positioning

WHAT'S NEXT?

Long-term outlook shaped by yerba mate maturity and the steady rise of functional alternatives

Innovation in flavoured powder drinks expected to support stable expansion through healthier formulations

Rising importance of protein and functional fortification to influence purchasing decisions

COMPETITIVE LANDSCAPE

Canarias SA remained the leading company as brand loyalty and wide distribution sustained its dominance

Carrau & Cia SA was the most dynamic competitor, supported by innovation in functional yerba mate

CHANNELS

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