



Euromonitor
International

Other Hot Drinks in Uruguay

December 2025

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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

Supermarkets strengthened their role while small local grocers remained key neighbourhood providers
E-commerce remained the most dynamic channel as digital retail reshaped shopper behaviour

CATEGORY DATA

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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
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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/other-hot-drinks-in-uruguay/report.