



**Euromonitor
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Soft Drinks in Uruguay

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EXECUTIVE SUMMARY

Improved economic environment drives soft drinks growth in 2025

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INDUSTRY PERFORMANCE

Residual effects of the water crisis persist

Health and wellness trend boosts consumption of 100% juice

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WHAT'S NEXT?

Moderate growth expected

Health and wellness trend expected to play an increasingly important role

Impact of climate change

COMPETITIVE LANDSCAPE

The Coca-Cola Company retains its lead in 2025

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2025 DEVELOPMENTS

Ongoing impact of drought and water quality issues

INDUSTRY PERFORMANCE

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Still purified bottled water attracts consumers with its lower unit prices

WHAT'S NEXT?

Climate change and health and wellness trend support strong growth

Expansion of home delivery and family pack offerings

Tap water filters may pose a challenge

COMPETITIVE LANDSCAPE

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[Carbonates in Uruguay](#)

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Consumer preference for bottled water

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WHAT'S NEXT?

Sugar concerns could hamper the development of carbonates

Non-cola flavours are set gain momentum, driven by flavour and functional versions

Private label and local brands will likely retain popularity among budget consumers

COMPETITIVE LANDSCAPE

Montevideo Refrescos SA dominates with its iconic brands

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INDUSTRY PERFORMANCE

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Liquid concentrates benefit from Argentine migrants settling in Uruguay

WHAT'S NEXT?

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Reformulating powder concentrates for health-conscious consumers
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COMPETITIVE LANDSCAPE

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100% juice benefits from consumers' preference for natural products free from additives and added sugar

WHAT'S NEXT?

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Vegetable-infused juices expected to gain momentum
Affordability and value-packaged juice drinks to drive sales

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Functional properties and innovative flavours could stimulate consumer interest

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Double-digit growth supported by an increase in promotion and advertising activity

Rising health consciousness drives demand for reduced sugar energy drinks

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Flavour innovation, the entry of new players, and enhanced distribution to drive consumption

Substantial marketing investment to propel category growth

Low-calorie and plant-based energy drinks may emerge in the coming years

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Monster leads, benefiting from Coca-Cola's extensive distribution network and effective marketing

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Innovative SueroX drives growth of reduced sugar sports drinks

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Oral replenishment beverages will widen the consumers base and add new consumption occasions

Premium pricing may limit accessibility to broader audience

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Gatorade retains its leadership amid rising competition from Powerade

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