



Soft Drinks in Uruguay

January 2026

Table of Contents

Soft Drinks in Uruguay

EXECUTIVE SUMMARY

Improved economic environment drives soft drinks growth in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Residual effects of the water crisis persist

Health and wellness trend boosts consumption of 100% juice

Functional beverages gain traction

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

Danone remains a dominant force in bottled water

CHANNELS

Supermarkets lead, expanding their presence across Uruguay

Retail e-commerce set to experience rapid growth

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Bottled Water in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing impact of drought and water quality issues

INDUSTRY PERFORMANCE

Bottled water benefits from ongoing consumer distrust of tap water

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

Cía Salus leads, offering a wide product portfolio

Montevideo Refrescos regains lost ground

CHANNELS

Supermarkets lead, strengthening their presence across the country

Dynamic e-commerce

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Carbonates in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Impact of rising health consciousness

INDUSTRY PERFORMANCE

Consumer preference for bottled water

Strengthening mixology trend benefits tonic water/mixers/other bitters

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

Local Barlinco SA invests in the development of a new generation of functional carbonates

CHANNELS

Supermarkets strengthen their leading position, driven by the acquisition of local chained grocers

Modern retailers have invested in online shopping capabilities

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

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[Concentrates in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

A positive year, yet challenges persist

INDUSTRY PERFORMANCE

Concentrates recover; however, continue to face competition from healthier beverages

Liquid concentrates benefit from Argentine migrants settling in Uruguay

WHAT'S NEXT?

Further growth expected if government tackles counterfeit products
Reformulating powder concentrates for health-conscious consumers
Expanding localised and functional flavour innovations

COMPETITIVE LANDSCAPE

Leading Mondelez loses ground to counterfeit products and economy brands
Van Dam strengthens its position in 2025

CHANNELS

Small local grocers dominated sales but losing ground against e-commerce
Supermarkets strengthen their omnichannel capabilities
Concentrates Conversions
Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025
Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

Juice in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising demand for more natural soft drinks benefits juice in 2025

INDUSTRY PERFORMANCE

Juice records strong growth as consumers focus on healthier beverages
100% juice benefits from consumers' preference for natural products free from additives and added sugar

WHAT'S NEXT?

Heightened health awareness to drive sustained growth
Vegetable-infused juices expected to gain momentum
Affordability and value-packaged juice drinks to drive sales

COMPETITIVE LANDSCAPE

Cooperativa Nacional de Productores de Leche leads, while Danone experiences dynamic growth

CHANNELS

Small local grocers benefit from their close proximity to consumers
Online sales rocket as players invest in online shopping capabilities

CATEGORY DATA

- Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025
- Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025
- Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
- Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
- Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
- Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
- Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
- Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
- Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
- Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
- Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
- Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Tea in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea remains an underdeveloped category in 2025

INDUSTRY PERFORMANCE

Moderate growth amidst limited popularity

WHAT'S NEXT?

Growth driven by premium positioning

Increasing health and wellness trend may attract new consumers

Functional properties and innovative flavours could stimulate consumer interest

COMPETITIVE LANDSCAPE

Arizona Iced Tea dominates, targeting upper-income consumers

Low profitability continues to discourage new entrants

CHANNELS

Supermarkets dominate distribution

Retail e-commerce continues to gain ground

CATEGORY DATA

- Table 93 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
- Table 94 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
- Table 95 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
- Table 96 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
- Table 97 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
- Table 98 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
- Table 99 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
- Table 100 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
- Table 101 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
- Table 102 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
- Table 103 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
- Table 104 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

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Energy Drinks in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks increasingly appealing to younger demographics

INDUSTRY PERFORMANCE

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

Rising health consciousness drives demand for reduced sugar energy drinks

WHAT'S NEXT?

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

COMPETITIVE LANDSCAPE

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

Red Bull strengthens its presence in 2025

CHANNELS

Supermarkets' expansion contributes to decline of small local grocers

E-commerce significantly increases its penetration

CATEGORY DATA

Table 105 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 106 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 107 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 115 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

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Sports Drinks in Uruguay

KEY DATA FINDINGS

2025 DEVELOPMENTS

Expanding array of consumption occasions and health trend ensure another strong year for sports drinks

INDUSTRY PERFORMANCE

Robust growth fuelled by innovation and new consumption occasions

Innovative SueroX drives growth of reduced sugar sports drinks

WHAT'S NEXT?

Health trend and climate change set to support sales

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

Premium pricing may limit accessibility to broader audience

COMPETITIVE LANDSCAPE

Gatorade retains its leadership amid rising competition from Powerade

CHANNELS

Small local grocers maintain their lead despite the rapid expansion of modern retailers

Retail e-commerce records dynamic growth

CATEGORY DATA

Table 117 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 118 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 119 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 120 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 121 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 122 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 123 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 124 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 125 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 126 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 127 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 128 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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