



Carbonates in Uruguay

January 2026

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Carbonates in Uruguay - Category analysis

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

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COUNTRY REPORTS DISCLAIMER

Soft Drinks in Uruguay - Industry Overview

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

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