



Processed Fruit and Vegetables in Uruguay

November 2025

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Processed Fruit and Vegetables in Uruguay - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail volume and current value growth rates slow in 2025

INDUSTRY PERFORMANCE

Health concerns depress demand for shelf stable vegetables

Frozen processed vegetables is the star performer in current value growth terms

WHAT'S NEXT?

Overall demand set to remain solid

Rising health awareness will continue to drive migration to frozen products

Private label penetration expected to increase further

COMPETITIVE LANDSCAPE

Soldo Hnos SA retains the overall lead in processed fruit and vegetables

Cooperativa Nacional de Productores de Leche records biggest value share gain

CHANNELS

Supermarkets remains the leading distribution channel

E-commerce is the most dynamic channel in 2025

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Staple Foods in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Current value growth dips while retail volume sales decline slightly

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Reduction in cross-border shopping continues to buoy demand

Uruguayans show growing preference for healthier staple foods

WHAT'S NEXT?

Outlook for staple foods is generally positive

Private label lines set to continue gaining ground

COMPETITIVE LANDSCAPE

Soldo Hnos SA and Pontyn SA remain the top two players in staple foods
Leopoldo Gross & Asoc SA is the most dynamic company in value growth terms

CHANNELS

Food/drink/tobacco specialists remains the leading distribution channel
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