



Staple Foods in Uruguay

November 2025

Table of Contents

[Staple Foods in Uruguay](#)

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

Uruguayan 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

Penetration of e-commerce continues to rise

MARKET DATA

[Table 1 - Sales of Staple Foods by Category: Volume 2020-2025](#)

[Table 2 - Sales of Staple Foods by Category: Value 2020-2025](#)

[Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025](#)

[Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025](#)

[Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025](#)

[Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025](#)

[Table 7 - Penetration of Private Label by Category: % Value 2021-2025](#)

[Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025](#)

[Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030](#)

[Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030](#)

[Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030](#)

[Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030](#)

COUNTRY REPORTS DISCLAIMER

SOURCES

[Summary 1 - Research Sources](#)

[Baked Goods in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value growth slows while rate of decline in retail volume sales deepens

INDUSTRY PERFORMANCE

Demand for unpackaged leavened bread continues to fall

Pastries shows the fastest development

WHAT'S NEXT?

Declining trend in unpackaged leavened bread consumption set to persist

Frozen baked goods expected to be the best performing category

Healthier product types will continue to gain ground in bread

COMPETITIVE LANDSCAPE

Panificadora Bimbo del Uruguay SA still the leading branded manufacturer

Crufi SA is the most dynamic company in value growth terms

CHANNELS

Baked goods distribution remains concentrated in food/drink/tobacco specialists

E-commerce registers the strongest current value growth of any channel

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail volume and current value sales return to growth in 2025

INDUSTRY PERFORMANCE

Rising health-consciousness continues to favour muesli and granola

Flakes is the weakest performer in retail volume growth terms

WHAT'S NEXT?

Breakfast cereals consumption set to rise steadily

Muesli and granola expected to remain the fastest growing category

Health concerns will continue to be a focal point for innovation

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA remains the leading player in breakfast cereals

Soldo Hnos SA is the best performing company

CHANNELS

Supermarkets still the most important distribution channel

Penetration of e-commerce increases in 2025

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Processed Fruit and Vegetables in Uruguay](#)

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

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Processed Meat, Seafood and Alternatives To Meat in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Overall demand picks up as purchasing power improves

INDUSTRY PERFORMANCE

Frozen processed red meat is the most dynamic category

Uruguayan show growing interest in meat and seafood substitutes

WHAT'S NEXT?

All categories expected to develop positively in volume and value terms

Influence of the health and wellness trend likely to become more pronounced

Proposed Minerva-Marfrig deal unlikely to go ahead

COMPETITIVE LANDSCAPE

Frigorifico Tacuarembo and Sucesores Carlos Schneck remain the top two players

Leopoldo Gross & Asoc SA is the best performing company in value growth terms

CHANNELS

Supermarkets remains the dominant distribution channel

E-commerce sales continue to grow at an impressive pace

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Uruguay](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value growth dips as retail volume sales continue to contract

INDUSTRY PERFORMANCE

Declining trend in rice and pasta consumption persists in 2025

Instant noodle pouches is the fastest expanding category

WHAT'S NEXT?

Rice and pasta retail volume sales expected to return to growth from 2026

Outlook is brightest for noodles

Healthier alternatives set to gain ground in all categories

COMPETITIVE LANDSCAPE

Darcel, Coopar and Molinos Arroceros Nacionales remain the top three players

Leopoldo Gross & Asoc is the most dynamic company

CHANNELS

Supermarkets still the top distribution channel

E-commerce shows the fastest growth in current value sales

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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