



Staple Foods in Uruguay

November 2025

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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

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

Penetration of e-commerce continues to rise

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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

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[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
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KEY DATA FINDINGS

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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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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

Uruguayans 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 Tacuarembó 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

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[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

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