



Coffee in Uruguay

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee demand strengthened despite global supply pressures and rising consumer expectations

INDUSTRY PERFORMANCE

Coffee retail sales increased as premiumisation and café culture expanded

Fresh ground coffee pods remained the fastest-growing segment thanks to premiumisation and accessibility

WHAT'S NEXT?

Coffee expected to sustain long-term growth as consumers gradually shift from yerba mate

Pod systems set to accelerate as compatible brands expand and premium formats gain reach

Digital channels and direct-to-consumer platforms to reshape access and assortment

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA strengthened its leading position through portfolio breadth and global backing

Vanacety SA (Illy) emerged as the most dynamic player thanks to premium positioning

CHANNELS

Supermarkets remained the dominant channel as retail consolidation expanded access

E-commerce was the most dynamic channel fuelled by delivery apps and direct-to-consumer expansion

CATEGORY DATA

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Hot Drinks in Uruguay - Industry Overview

EXECUTIVE SUMMARY

Hot drinks performance supported by economic stability and improving consumer sentiment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Category recovery strengthened as water-quality concerns eased and innovation increased

Climate pressures reshaped global coffee sourcing, but café culture compensated locally

Tea benefited from wellness and natural positioning despite seasonal limitations

WHAT'S NEXT?

Hot drinks expected to stabilise with gradual shifts in category composition

Wellness, natural ingredients and reformulation will drive tea and flavoured powder drinks trends

Premium coffee formats to gain relevance as consumers seek higher-quality experiences

COMPETITIVE LANDSCAPE

Nestlé del Uruguay SA maintained strong leadership supported by broad coverage and global capabilities
Supermercados Disco SA was the most dynamic performer due to private label expansion

CHANNELS

Supermarkets remained dominant as consolidation reshaped the retail landscape
E-commerce expanded rapidly due to delivery apps and marketplace penetration
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