



# Concentrates in Uruguay

January 2026

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## Concentrates in Uruguay - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

A positive year, yet challenges persist

#### INDUSTRY PERFORMANCE

Concentrates recover; however, continue to face competition from healthier beverages

Liquid concentrates benefit from Argentine migrants settling in Uruguay

#### WHAT'S NEXT?

Further growth expected if government tackles counterfeit products

Reformulating powder concentrates for health-conscious consumers

Expanding localised and functional flavour innovations

#### COMPETITIVE LANDSCAPE

Leading Mondelez loses ground to counterfeit products and economy brands

Van Dam strengthens its position in 2025

#### CHANNELS

Small local grocers dominated sales but losing ground against e-commerce

Supermarkets strengthen their omnichannel capabilities

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Improved economic environment drives soft drinks growth in 2025

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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

## CHANNELS

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