



# 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

#### CATEGORY DATA

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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

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Food/drink/tobacco specialists remains the leading distribution channel  
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