

Snacks in Uruguay

July 2023

Table of Contents

Snacks in Uruguay

EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

- Table 1 Sales of Snacks by Category: Volume 2018-2023
- Table 2 Sales of Snacks by Category: Value 2018-2023
- Table 3 Sales of Snacks by Category: % Volume Growth 2018-2023
- Table 4 Sales of Snacks by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Snacks: % Value 2019-2023
- Table 6 LBN Brand Shares of Snacks: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2018-2023
- Table 8 Distribution of Snacks by Format: % Value 2018-2023
- Table 9 Forecast Sales of Snacks by Category: Volume 2023-2028
- Table 10 Forecast Sales of Snacks by Category: Value 2023-2028
- Table 11 Forecast Sales of Snacks by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Snacks by Category: % Value Growth 2023-2028

APPENDIX

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Chocolate confectionery continues to see positive growth in 2023 after surpassing pre-pandemic levels a year earlier Seasonal chocolate expected to be most dynamic in 2023 after getting fully back on course following the pandemic Players trying to keep price rises below inflation

PROSPECTS AND OPPORTUNITIES

Family pack sizes expected to expand beyond tablets and into other categories

More growth expected for the retail e-commerce channel

Black octagon labels having little impact on chocolate confectionery sales

CATEGORY DATA

- Table 13 Sales of Chocolate Confectionery by Category: Volume 2018-2023
- Table 14 Sales of Chocolate Confectionery by Category: Value 2018-2023
- Table 15 Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023
- Table 16 Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023
- Table 17 Sales of Chocolate Tablets by Type: % Value 2018-2023
- Table 18 NBO Company Shares of Chocolate Confectionery: % Value 2019-2023
- Table 19 LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023
- Table 20 Distribution of Chocolate Confectionery by Format: % Value 2018-2023
- Table 21 Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028
- Table 22 Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

Gum in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Gum continues its recovery in 2023 from the sales slump seen during the pandemic

Lack of innovation sees bubble gum underperforming

The Beldent and Top Line brands dominate the gum category

PROSPECTS AND OPPORTUNITIES

Sales will not return to pre-pandemic levels over the forecast period

E-commerce penetration expected to remain limited for gum

New labelling law having an impact on bubble gum

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2018-2023

Table 26 - Sales of Gum by Category: Value 2018-2023

Table 27 - Sales of Gum by Category: % Volume Growth 2018-2023

Table 28 - Sales of Gum by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Gum: % Value 2019-2023

Table 30 - LBN Brand Shares of Gum: % Value 2020-2023

Table 31 - Distribution of Gum by Format: % Value 2018-2023

Table 32 - Forecast Sales of Gum by Category: Volume 2023-2028

Table 33 - Forecast Sales of Gum by Category: Value 2023-2028

Table 34 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

Sugar Confectionery in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sugar confectionery continues its recovery from its loss of sales during the pandemic

Pastilles, gums, jellies and chews seeing a strong recovery from the pandemic

Medicated confectionery performing well, thanks to its role as a breath freshener

PROSPECTS AND OPPORTUNITIES

Lollipops expected to be the worst performer in sugar confectionery

Van Dam will continue to lead sugar confectionery

New labelling law could impact sales of toffees, caramels and nougat

CATEGORY DATA

Table 36 - Sales of Sugar Confectionery by Category: Volume 2018-2023

Table 37 - Sales of Sugar Confectionery by Category: Value 2018-2023

Table 38 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023

Table 39 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023

Table 40 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023

Table 41 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023

Table 42 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023

Table 43 - Distribution of Sugar Confectionery by Format: % Value 2018-2023

Table 44 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028

- Table 45 Forecast Sales of Sugar Confectionery by Category: Value 2023-2028
- Table 46 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028
- Table 47 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

Ice Cream in Uruquay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Impulse ice cream continues its recovery after its decline during the pandemic

Traditional ice cream stores expanded into the modern grocery retailing channel during the pandemic

Supply problems hit leading brand Conaprole's share

PROSPECTS AND OPPORTUNITIES

Number two player Crufi is expanding beyond ice cream in the packaged food market

E-commerce expected to continue gaining share

Plant-based ice cream will continue to record the fastest growth

CATEGORY DATA

- Table 48 Sales of Ice Cream by Category: Volume 2018-2023
- Table 49 Sales of Ice Cream by Category: Value 2018-2023
- Table 50 Sales of Ice Cream by Category: % Volume Growth 2018-2023
- Table 51 Sales of Ice Cream by Category: % Value Growth 2018-2023
- Table 52 NBO Company Shares of Ice Cream: % Value 2019-2023
- Table 53 LBN Brand Shares of Ice Cream: % Value 2020-2023
- Table 54 Distribution of Ice Cream by Format: % Value 2018-2023
- Table 55 Forecast Sales of Ice Cream by Category: Volume 2023-2028
- Table 56 Forecast Sales of Ice Cream by Category: Value 2023-2028
- Table 57 Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028
- Table 58 Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

Savoury Snacks in Uruquay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Savoury snacks continues recording positive growth in 2023

Limited impact of new labelling law on savoury snacks

Panificadora Bimbo del Uruguay continues falling down the company rankings

PROSPECTS AND OPPORTUNITIES

Modern grocery retailers and e-commerce expected to grow

La Trigueña launching healthier alternatives in savoury biscuits

Rice snacks and vegetable, pulse and bread chips will be most dynamic over the forecast period

CATEGORY DATA

- Table 59 Sales of Savoury Snacks by Category: Volume 2018-2023
- Table 60 Sales of Savoury Snacks by Category: Value 2018-2023
- Table 61 Sales of Savoury Snacks by Category: % Volume Growth 2018-2023
- Table 62 Sales of Savoury Snacks by Category: % Value Growth 2018-2023
- Table 63 NBO Company Shares of Savoury Snacks: % Value 2019-2023
- Table 64 LBN Brand Shares of Savoury Snacks: % Value 2020-2023
- Table 65 Distribution of Savoury Snacks by Format: % Value 2018-2023
- Table 66 Forecast Sales of Savoury Snacks by Category: Volume 2023-2028

- Table 67 Forecast Sales of Savoury Snacks by Category: Value 2023-2028
- Table 68 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028
- Table 69 Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

Sweet Biscuits, Snack Bars and Fruit Snacks in Uruquay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sweet biscuits sales continue to grow in 2023

Cereal bar sales being impacted by the black octagon labelling system

Papa Chips sells its Toddy brand while Panificadora Bimbo del Uruguay closes its El Maestro Cubano plant in Montevideo

PROSPECTS AND OPPORTUNITIES

Protein/energy bars will be most dynamic over the forecast period

Healthy new alternatives in sweet biscuits could be the upshot of the ban on sales of high-sugar products in schools

Mondelez is the leading company, although Durulte has the number one brand in Portezuelo

CATEGORY DATA

- Table 70 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023
- Table 71 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023
- Table 72 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023
- Table 73 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023
- Table 74 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023
- Table 75 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks; % Value 2020-2023
- Table 76 NBO Company Shares of Sweet Biscuits: % Value 2019-2023
- Table 77 LBN Brand Shares of Sweet Biscuits: % Value 2020-2023
- Table 78 NBO Company Shares of Snack Bars: % Value 2019-2023
- Table 79 LBN Brand Shares of Snack Bars: % Value 2020-2023
- Table 80 NBO Company Shares of Fruit Snacks: % Value 2019-2023
- Table 81 LBN Brand Shares of Fruit Snacks: % Value 2020-2023
- Table 82 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023
- Table 83 Distribution of Sweet Biscuits by Format: % Value 2018-2023
- Table 84 Distribution of Snack Bars by Format: % Value 2018-2023
- Table 85 Distribution of Fruit Snacks by Format: % Value 2018-2023
- Table 86 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028
- Table 87 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028
- Table 88 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028
- Table 89 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with

country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-uruguay/report.