

# Processed Meat, Seafood and Alternatives To Meat in Uruguay

December 2023

Table of Contents

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Price inflation drives cross-border shopping  
Frigorifico Tacuarembó SA leads fragmented category  
Private label gains share in shelf-stable seafood

### PROSPECTS AND OPPORTUNITIES

Frozen meat and seafood substitutes is the stand-out category  
Foodservice to recover to pre-pandemic sales levels  
Premium options to support growth of chilled processed red meat

### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023  
Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023  
Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023  
Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023  
Table 5 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 7 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 8 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023  
Table 9 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023  
Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023  
Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023  
Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023  
Table 13 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028  
Table 14 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Staple Foods in Uruguay - Industry Overview

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture  
Key trends in 2023  
Competitive Landscape  
Channel developments  
What next for staple foods?

### MARKET DATA

Table 15 - Sales of Staple Foods by Category: Volume 2018-2023  
Table 16 - Sales of Staple Foods by Category: Value 2018-2023  
Table 17 - Sales of Staple Foods by Category: % Volume Growth 2018-2023  
Table 18 - Sales of Staple Foods by Category: % Value Growth 2018-2023  
Table 19 - NBO Company Shares of Staple Foods: % Value 2019-2023  
Table 20 - LBN Brand Shares of Staple Foods: % Value 2020-2023  
Table 21 - Penetration of Private Label by Category: % Value 2019-2023  
Table 22 - Distribution of Staple Foods by Format: % Value 2018-2023  
Table 23 - Forecast Sales of Staple Foods by Category: Volume 2023-2028  
Table 24 - Forecast Sales of Staple Foods by Category: Value 2023-2028  
Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028  
Table 26 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

## SOURCES

### Summary 1 - Research Sources

#### 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/processed-meat-seafood-and-alternatives-to-meat-in-uruguay/report](http://www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-uruguay/report).