

LAC Marketplace Explorer Uruguay | Annual Report 2022

Highlights

- Total marketplace traffic reached 166.5 million visits in 2022, down 1.7 per cent from 2021.
- Traffic in transactional marketplaces dropped while visits to no-transactional sites grew.
- Mercado Libre dominates the marketplace landscape, concentrating 78.7 per cent share of total marketplace traffic.
- According to industry estimates, e-commerce sales increased 51% on average across firms.

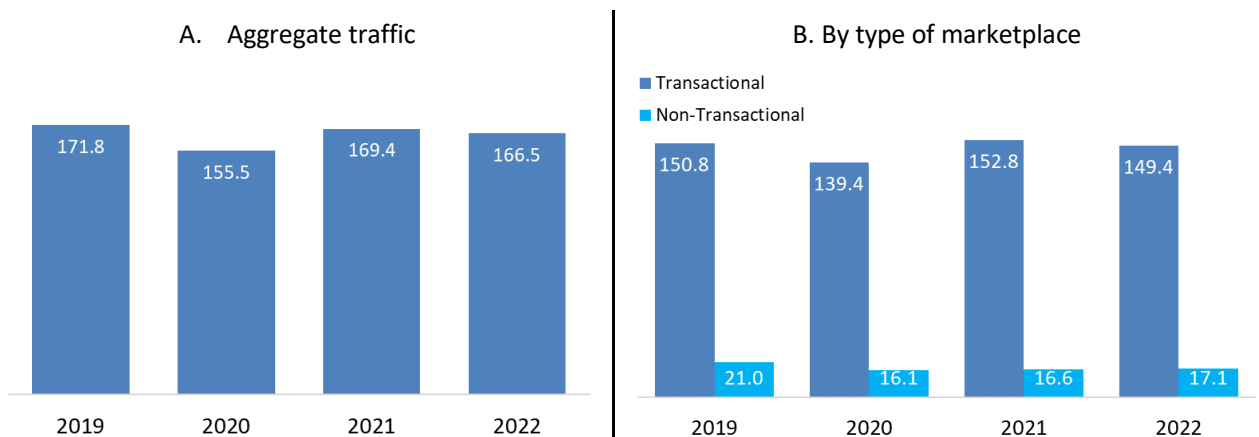
1. Marketplace activity

Marketplace traffic in Uruguay totaled 166.5 million visits, a 1.7 per cent decrease from the previous year (Figure 1.A). The decline was led by transactional sites, which decreased 2.2 per cent y.o.y. (Figure 1.B). Most marketplace activity in Uruguay is concentrated in intra-continental marketplaces, which account for around 88 per cent of total traffic.

According to the Digital Economy Chamber of Uruguay, in 2022 e-commerce sales increased 51% on average across firms with respect to 2021.

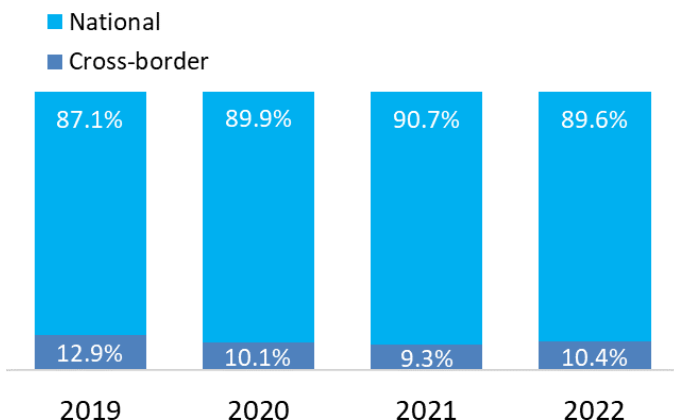
Uruguay is the eighth largest LAC country in terms of marketplace traffic, with a 1 per cent share (Figure 3). In 2022, the percentage of cross-border visits to sites targeting the country as a share of total visits was 10.4 per cent (Figure 2).

Figure 1. Evolution of marketplace traffic, Uruguay, 2019-2022 (million visits)



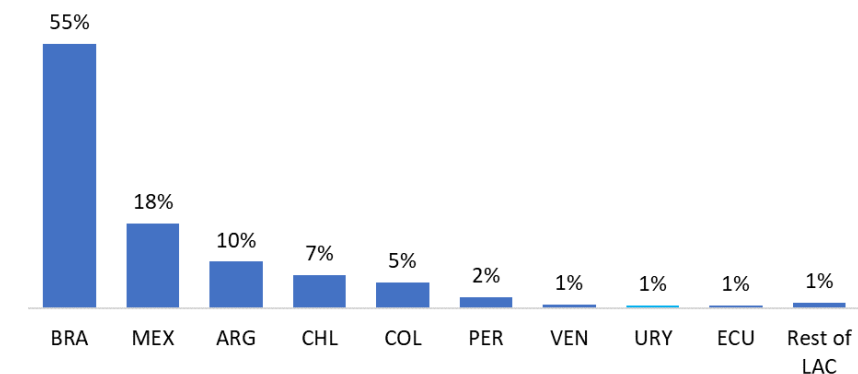
Source: LACME.

Figure 2. Distribution of marketplace traffic across marketplaces by origin of visitor traffic, Uruguay, 2019-2022 (million visits)



Source: LACME.

Figure 3. Distribution of marketplace traffic across countries, LAC, 2022



Source: LACME.

2. Marketplace landscape

In 2022, there were 46 active B2C marketplaces for goods in Uruguay. The top 10 most visited marketplaces concentrated 97.3 per cent of total traffic (Table 1). Mercado Libre was by far the most popular marketplace, with 78.7 per cent of total traffic, followed by Gallito, with 4.7 per cent. Traffic from Uruguay to foreign global marketplaces stood at 34.5 million, 2.5 percent lower than in 2021. The most visited global site was Amazon, with 59.9 per cent of total traffic in global marketplaces (Figure 5.B).

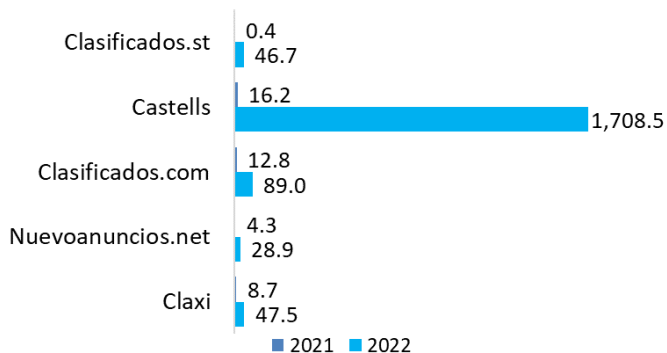
The fastest growing marketplaces in 2022 were Castells, an auctions site specialized in all kinds of goods; and Clasificados.st, Clasificados.com and Nuevoanuncios.net, and Claxi, all classifieds sites (Figure 4).

Table 1. Leading marketplaces in Uruguay, 2022

Marketplace	Traffic (mill. visits)	Traffic share (%)	Annual growth (%)
Mercado Libre	131.0	78.7	-4.7
Gallito	7.9	4.7	-11.6
Sodimac Homecenter	7.0	4.2	-7.5
PedidosYa	5.4	3.3	17.2
eBay	2.5	1.5	32.3
Bavastro	2.2	1.3	82.2
Locanto	2.2	1.3	-30.7
Castells	1.7	1.0	-
Wedding wire	1.2	0.7	299.8
Planeta	1.0	0.6	6.5
Top-10	162.1	97.3	-2.4

Source: LACME.

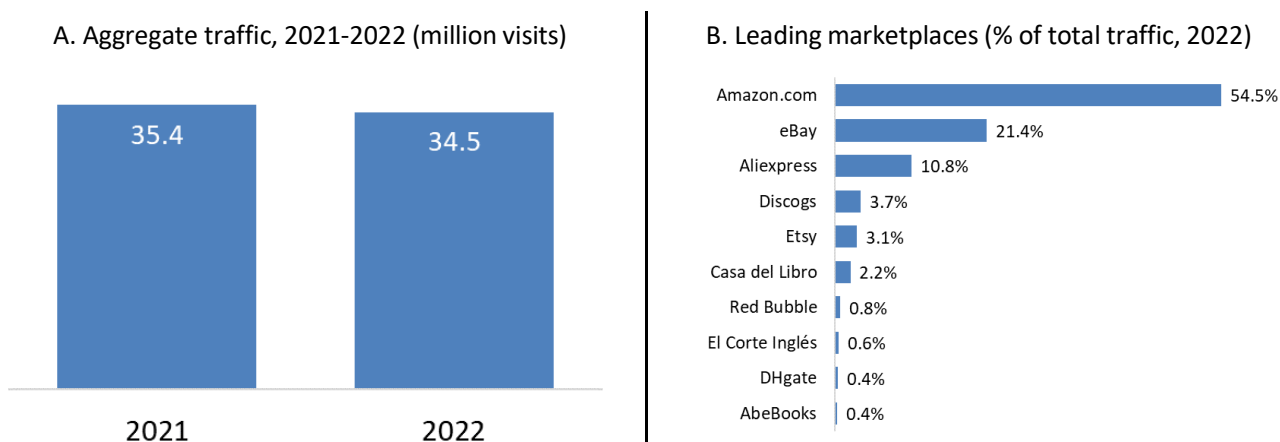
Figure 4. Traffic of fastest growing marketplaces in Uruguay, 2021-2022 (thousand visits)



Note: Marketplaces are ordered in decreasing order of percentage annual growth rates.

Source: LACME.

Figure 5. Traffic from Uruguay in foreign global marketplaces that ship to Uruguay, 2021-2022



Note: Marketplaces include all their country domains (e.g., Amazon includes amazon.es and amazon.fr).

Source: LACME.

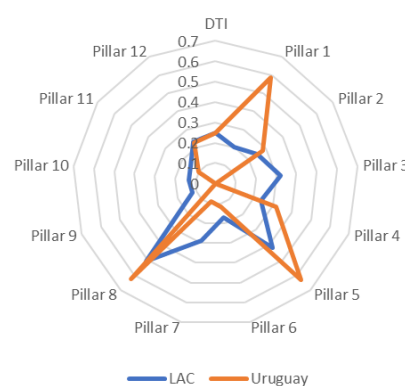
Table 2. Selected e-commerce environment indicators, Uruguay, 2019-2022

Indicator	2019	2020	2021	2022
Active mobile-broadband subscriptions (per 100 inh.)	102.1	106.7	109.1	115.8
Population using the Internet (%)	83.4	86.3	90.1	89.9
Cross-border e-commerce (% of online sales)	-	-	9.0	39.0
Credit card ownership (% of adults)	-	-	36.6	-
Digital Trade Restrictiveness Index	-	-	-	-
Integrated Index of Postal Development	-	-	-	-

Source: OECD, ECLAC, World Bank, Ebanx, UPU, DTI Project.

3. Regional digital trade integration index

From the analysis of relevant policies for the integration of digital trade, the Regional Digital Trade Integration Index (RDTII) shows Uruguay's performance compared to other LAC countries. The analysis integrates the scores of 12 pillars using a simple average method, where each pillar of the DTII is the weighted average of the indicator-level scores. Indicator scores range from "0" to "1" (where 0 indicates a better integration index) and are based on a review of existing policies and regulations, including those for ICT goods, intermediate goods, and inputs; digital delivery services; foreign investment in sectors relevant to digital trade; and use of personal data. The framework covers two components of digital trade policies, namely restrictions and enabling policies.

Figure 6. RDTI – pillar scores, Uruguay and LAC**Table 3. RDTI – pillars scores**

	LAC	Uruguay
DTI index	0.25	0.25
Pillar 1: Tariffs and trade defense	0.20	0.59
Pillar 2: Public procurement	0.25	0.28
Pillar 3: Foreign Direct Investment	0.32	0.00
Pillar 4: Intellectual Property Rights (IPRs)	0.24	0.32
Pillar 5: Telecom infrastructure & competition	0.42	0.63
Pillar 6: Cross-border data policies	0.17	0.12
Pillar 7: Domestic Data policies	0.29	0.09
Pillar 8: Intermediary liability	0.51	0.63
Pillar 9: Content access	0.12	0.00
Pillar 10: Quantitative trade restrictions	0.13	0.00
Pillar 11: Technical standards	0.15	0.10
Pillar 12: Online sales and transactions	0.23	0.23

Source: Digital Trade Integration Project.

Uruguay's main strengths include
Among the key recommendations,

Additional resources

Uruguay

- eTrade for all Country Profile
<https://etradeforall.org/wp-content/uploads/countryprofiles/2021/URUGUAY.pdf>
- U.S. International Trade Administration Country Commercial Guide
<https://www.trade.gov/country-commercial-guides/uruguay-market-overview?section-nav=4976>
- Digital Trade Integration Project Country Profile
<https://dti.eui.eu/database/?country=UY&country2=&chapter=&enablingOrRestrictions=ER&v=2>
- Digital Economy Chamber of Uruguay
<https://www.cedu.org.uy/>

Latin America and the Caribbean

- Digital Agenda for Latin America and the Caribbean (eLAC 2024)
<https://www.cepal.org/en/projects/digital-agenda-latin-america-and-caribbean-elac2024>
- eTrade for all news and resources
<https://etradeforall.org/es/noticias/>
- International Trade Centre Country Profiles
<https://marketanalysis.intracen.org/en/country-profile>

About the LAC Marketplace Explorer

The Latin America and the Caribbean Marketplace Explorer maps and monitors activity on retail e-commerce marketplaces across the region. It covers visitor traffic and other main characteristics of almost 900 marketplaces and more than 2,900 marketplace websites. It was developed by the ecomConnect team at the International Trade Centre (ITC), the United Nations Economic Commission for Latin America and the Caribbean (UN-ECLAC), and the Centre for Market Insights of the Amsterdam University of Applied Sciences, with the support of the Forum for East Asia-Latin America Cooperation (FEALAC). Learn more and explore the data at <https://www.cepal.org/en/notes/latin-america-and-caribbean-marketplace-explorer-lacme>.