



# Hot Drinks in Chile

November 2025

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### EXECUTIVE SUMMARY

Mixed performance in unstable economic setting

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Challenging environment influences consumers' purchasing decisions  
Rising temperatures in Chile present both challenges and opportunities  
Tea under increasing pressure from coffee as Chilean's favoured hot drink  
Discerning consumers increasingly attracted to fresh coffee formats

### WHAT'S NEXT?

Improving economy likely to drive rebound but polarising trends will remain  
Healthy attributes and functionality offer value growth potential  
Rising temperatures to remain a challenge for future of hot drinks in Chile

### COMPETITIVE LANDSCAPE

Nestlé and Cambiaso Hermanos remain convincing leaders overall  
Cencosud's strong growth supported by private label offer

### CHANNELS

Major grocery retailers maintain dominant positions in distribution of hot drinks  
E-commerce continues to post dynamic growth as Chileans seek convenience  
Foodservice vs retail split

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### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Mixed performance for coffee due to rising prices, but quality remains a consideration

#### INDUSTRY PERFORMANCE

Stronger volume growth hampered by a constant hike in coffee costs

Fresh ground coffee remains strong performer, through expanding offer and regular use of coffee machines at home

#### WHAT'S NEXT?

Extreme weather conditions could challenge coffee sales growth in coming years

Functionality combined with other enhancing ingredients may impulse further growth

Specialist coffee shops innovate to capture younger audiences

#### COMPETITIVE LANDSCAPE

Nestlé retains convincing leadership of coffee

Private label gains share through major retailers like Cencosud

#### CHANNELS

Supermarkets and hypermarkets continue to dominate coffee distribution

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[Tea in Chile](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Mixed growth, with tea variants offering perceived health benefits standing out

#### INDUSTRY PERFORMANCE

Mature tea records stagnant performance as it loses ground to coffee

Chileans increasingly attracted to tea variants with perceived health attributes

#### WHAT'S NEXT?

Green tea and fruit/herbal tea to drive new wellness-oriented efforts  
Strong potential for iced tea in Chile driven by rising temperatures  
Tea brands set to embrace sustainability to appeal to eco-conscious consumers

#### COMPETITIVE LANDSCAPE

Cambiaso Hermanos SAC's dominant position due to wide presence across tea  
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#### CHANNELS

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[Other Hot Drinks in Chile](#)

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Multiple factors negatively impact the performance of other hot drinks

#### INDUSTRY PERFORMANCE

Sales decrease due to declining consumption of milk, and rising temperatures  
Rising temperatures challenge demand for other hot drinks like yerba mate

#### WHAT'S NEXT?

Further declines for yerba mate to be driven by a warmer climate  
Rising concerns about high sugar content could fuel new product innovation  
Addition of protein to flavoured powder drinks offers functionality

#### COMPETITIVE LANDSCAPE

Nestlé's leadership driven by dominance in flavoured powder drinks  
Private label continues to make gains with competitive pricing

#### CHANNELS

Supermarkets and hypermarkets dominate distribution with wide networks  
E-commerce continues to make gains with competitive offers and convenience

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