



# Tea in Chile

November 2025

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## Tea in Chile - Category analysis

### 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

Dynamic growth of Golden Sail driven by strong online presence

#### CHANNELS

Supermarkets and hypermarkets benefit from economies of scale

E-commerce continues to make gains through convenience and wide offer

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## Hot Drinks in Chile - Industry Overview

### 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

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Major grocery retailers maintain dominant positions in distribution of hot drinks  
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