

Soft Drinks in Chile

November 2025

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Soft Drinks in Chile

EXECUTIVE SUMMARY

The challenging economic situation continues to exert a strong influence on performance

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price rises and a shift to healthier options boost total value sales growth

Pursuit of healthier lifestyles accelerates with knock-on effects for soft drinks

Climate change impacts juice in Chile

WHAT'S NEXT?

Economic improvements to free up consumer spending on soft drinks

Wellness and functionality to add significant value sales growth potential to soft drinks

Better for you trend to accelerate

COMPETITIVE LANDSCAPE

Coca-Cola de Chile leverages leadership of the key category to stay ahead of the field Bless is a disruptive, fast-growing brand in juice

CHANNELS

The competition intensifies in the distribution of soft drinks Limitations remain for foodservice in soft drinks

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Bulk buying to gain traction driven by affordability and convenience

Growing penetration of water purifiers may hamper the growth potential of bottled water

Rising consumer sophistication around bottled water

COMPETITIVE LANDSCAPE

Aguas CCU - Nestlé Chile is a strong and innovative leader in bottled water Distribución & Servicios D&S gains by strengthening its private label offer

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Lower-priced and healthier-positioned categories exert pressure on carbonates Tonic water surges with the mixology trend

WHAT'S NEXT?

Carbonates to capture new generations of consumers

Better for you and indulgence in demand

Sustainability to grow in importance as environmental concerns increase

COMPETITIVE LANDSCAPE

Coca-Cola de Chile uses huge resources to find ways to appeal to consumers

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2025 DEVELOPMENTS

Affordability sustains a demand for concentrates

INDUSTRY PERFORMANCE

Powder concentrates offer a range of options and affordability to lead the category Nutritional offerings raise the profile of sports drinks powders

WHAT'S NEXT?

Stagnation is anticipated for concentrates in the forecast period

Emerging functionality-driven options offer growth potential

The demand for vegetable-based options is set to remain weak in Chile

COMPETITIVE LANDSCAPE

Tresmontes Lucchetti leads with a strong range and new product development

The leading player is the most dynamic

CHANNELS

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Juice encounters strong challenges

INDUSTRY PERFORMANCE

Climatic impact on availability and prices

Consumers trade down to reconstituted 100% juice

WHAT'S NEXT?

100% juice to gain momentum amidst improving economic conditions and a search for healthier options

Players to tap into inelastic juice demand areas as challenges persist

Sustainability to shape juice brand owners' presentations

COMPETITIVE LANDSCAPE

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RTD Coffee in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee struggles to gain acceptance in Chile

INDUSTRY PERFORMANCE

RTD coffee's presence is narrow

Consumer taste preferences challenge the appeal of RTD coffee

WHAT'S NEXT?

RTD coffee may develop and grow but retain a niche profile

Flavour innovation and diverse content may capture a wider audience

Plant-based and functional products could help to build demand around younger generations

COMPETITIVE LANDSCAPE

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RTD Tea in Chile

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

RTD tea develops in new, healthier directions

Rise of specialist tea shops widens consumption occasions

WHAT'S NEXT?

Reduced sugar to gain ground on regular in still RTD tea

Kombucha to leverage a functional and healthy profile to remain on a fast upward sales trajectory

Expansion of specialist coffee and tea shops to boost product awareness and positioning

COMPETITIVE LANDSCAPE

Lipton enjoys wide distribution and high brand recognition

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks expands consumer and distribution reach

INDUSTRY PERFORMANCE

Energy drinks consumption continues to grow fast in Chile

Growing awareness of the health risks of high sugar intake spurs interest in reduced sugar variants

WHAT'S NEXT?

Enriched energy drinks may spike sales

Mixology trend to support stronger on-trade consumption of energy drinks

Focus on lower-income consumers to bring channel shifts

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Broader usage occasions spur sports drinks

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Oral hydration solutions increase penetration

Higher unit prices push positive retail value growth for reduced sugar sports drinks despite a fall in demand

WHAT'S NEXT?

Health-orientated products are set to capture further demand in sports drinks

Reduced sugar products are well placed to gain ground

Emerging role of sports drinks as a solution to hangovers

COMPETITIVE LANDSCAPE

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