



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

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WHAT'S NEXT?

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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
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INDUSTRY PERFORMANCE

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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

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[Juice in Chile](#)

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Climatic impact on availability and prices

Consumers trade down to reconstituted 100% juice

WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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[RTD Coffee in Chile](#)

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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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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

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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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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?

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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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[Sports Drinks in Chile](#)

KEY DATA FINDINGS

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