



Coffee in Chile

November 2025

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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

E-commerce sales continue expanding, driven by convenience and wide availability of online platforms

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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

CHANNELS

Major grocery retailers maintain dominant positions in distribution of hot drinks

E-commerce continues to post dynamic growth as Chileans seek convenience

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