



Carbonates in Chile

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Reduced sugar variants continue to gain ground

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

Private label sees increasing penetration amidst price concerns

CHANNELS

Small local grocers lead but cede ground in a price-sensitive environment

Retail e-commerce develops through manufacturer and retailer initiatives

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[Soft Drinks in Chile - Industry Overview](#)

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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