



Euromonitor
International

Carbonates in Chile

November 2025

Table of Contents

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

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

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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

CHANNELS

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

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Chile

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SOURCES

Summary 1 - Research Sources

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