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Report Highlights:

Chile's hotels, restaurants and institutional foodservice (HRI) sector showed a clear recovery through 2024 driven primarily by a tourism rebound, easing monetary policy, and a release of pent-up demand for eating-out and travel. International arrivals hit record levels in 2024, particularly in Santiago, Iquique, Valparaíso, La Serena, Villarrica, Puerto Montt and Punta Arenas. The influx of tourists supported higher hotel occupancy and restaurant traffic, leading to new hotel openings and chain expansion. At the same time, operators faced persistent cost pressures (food, energy, and logistics) and a consumer base that remains price sensitive as real household purchasing power recovers unevenly. The Chilean Central Bank's gradual rate easing and lower headline inflation helped but did not fully remove cost and margin pressures.

Market Fact Sheet: Chile

Executive Summary

Chile is a South American country that borders the Pacific Ocean, Argentina, Bolivia, and Peru. Chile is divided into 16 administrative regions. In 2024, Chile had a population of 19.6 million, with 8.4 million living in the Santiago Metropolitan region.

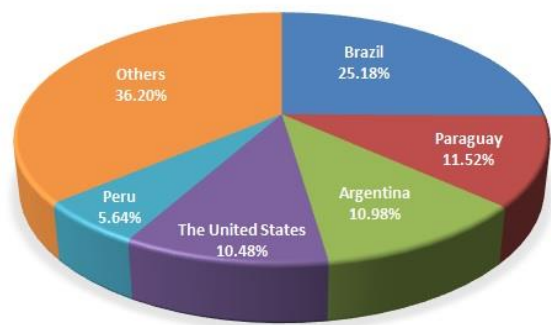
In 2024, Chile’s Gross Domestic Product (GDP) in current prices totaled \$330 billion, a 2.6 percent increase over 2023. For 2025, the Chilean Central Bank projects a GDP growth that will range between 2.0 and 2.3 percent. GDP per capita reached \$34,637 PPP in 2024 (World Bank), leaving Chile as one of the countries with the highest per capita GDP in Latin America.

Chile’s economy is driven by exports, concentrated primarily in mining, fresh fruit, forestry, and fishery products. In 2024, Chilean agriculture represented 9.0 percent of the country’s GDP (\$30 billion), 25 percent of exports (\$24 billion), and employed around 10 percent of Chile’s labor force.

U.S. agricultural and related exports to Chile totaled \$903.7 million in 2024. Chile is the third-largest market in South America for these products, after Colombia and Brazil. U.S. products are important for Chilean consumers: the United States is the fourth-largest supplier of agricultural and related products to Chile with a 9.1 percent market share.

Imports of Consumer-Oriented Products

CHILEAN IMPORTS OF CONSUMER-ORIENTED PRODUCTS FROM THE WORLD IN 2024 (%)



Source: Trade Data Monitor

Chile is an exciting market for U.S. consumer-oriented products, that is, final goods that are high-value and ready for sale to the consumer. In 2024, consumer-oriented agricultural exports summed \$562 million, comprising over 62 percent of all agricultural exports. The top U.S. consumer-oriented products exports to Chile are dairy products, condiments and sauces, food preparations, beef and beef products, pork, poultry, pet food, beer, tree nuts, and distilled spirits.

Food Processing Industry

The food processing industry is one of the largest segments of the Chilean economy. The food and beverage

processing industry represents 6.3 percent of Chile’s exports, at \$6.28 billion in 2024. The sector contributed 3.6 percent to national GDP in 2024 and employed over two million workers.

Food Retail Industry

Chile has a modern and dynamic retail food industry. The food retail landscape is dominated by large supermarket chains such as *Walmart*, *Cencosud*, *SMU*, and *Falabella*, but there has also been a surge in smaller, specialized stores and e-commerce. Chile’s food retail sales reached \$29.76 billion in 2024; a 2.9 percent growth compared to 2023. Supermarkets and grocery stores remained the primary retail channels for food products, accounting for around 53.6 percent of the market share.

Quick Facts CY 2024

Imports of U.S. Consumer-Oriented Products: \$562 million

Leading Consumer Foodservice Chains in Chile:

- | | |
|----------------------|-----------------------|
| 1) <i>Mc Donalds</i> | 2) <i>Papa John’s</i> |
| 3) <i>Doggis</i> | 4) <i>Starbucks</i> |
| 5) <i>KFC</i> | 6) <i>Niu Sushi</i> |

Leading Hotel Chains:

- 1) *Accor Group (Novotel, Pullman, Ibis and Mercure)*
- 2) *Marriott Internacional (Sheraton, Marriott, Courtyard by Marriott, and The Ritz Carlton)*
- 3) *Hilton (Hilton Garden Inn and Doubletree by Hilton)*
- 4) *IHG (Holiday Inn, Crowne Plaza, and Intercontinental Hotel)*
- 5) *Best Western*
- 6) *Hyatt (Hyatt Centric, Hyatt Place, and Vik Chile)*
- 7) *NH Hotel Group S.A.*

Leading Institutional Foodservice Companies:

- | | |
|---------------------------------|--------------------|
| 1) <i>Aramark</i> | 2) <i>Sodexho</i> |
| 3) <i>Compass Catering S.A.</i> | 4) <i>DeliBest</i> |
| 5) <i>Aliservice</i> | |

Food Industry by Channels (U.S. billion) 2024:

Retail Food Sales	\$29.7
Food Processing	\$23.9
Chile Food & Ag Exports	\$25.3
Chile Food & Ag Imports	\$10.8

GDP/Population:

Population (millions): 19.6
GDP (billions USD): \$330
GDP per capita (USD PP): \$34,637 PPP

Sources: Trade Data Monitor (TDM), Euromonitor, World Bank, Chilean Central Bank, Chilean National institute of Statistics (INE), and Euromonitor

Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
Chile has one of the highest income per capita rates in Latin America.	Relatively small-size market compared to neighboring countries.
Opportunities	Threats
The U.S.-Chile Free Trade Agreement resulted in zero percent duties for all U.S. agricultural products.	High inflation in recent years.

Section I: Market Summary

In 2024, Chile’s consumer foodservice sector was navigating a landscape shaped by economic sensitivity and evolving consumer preferences. While inflation eased throughout the year, it remained high, maintaining Chile's status as a relatively expensive country. Increased operational input costs were consistently passed on to the public, compelling consumers to gravitate towards more economical options like fast food restaurants and reducing the frequency of dining out. Despite cautious spending behaviors, the overall consumer foodservice market saw value sales grow robustly by 8.1 percent in current terms in 2024, reaching \$4.9 million.

Simultaneously, Chile’s HRI sector experienced renewed momentum supported by a record number of tourists in 2024, marking the recovery of both international and domestic tourism, strengthening hotel occupancy and restaurant activity. Operators benefited from the continued expansion of digital foodservice channels, including delivery platforms and online reservations, while consumer preferences shifted toward premium, healthier, and more sustainable food options.

Despite these positive drivers, the sector continued to face structural challenges. Higher operating costs, including energy and labor costs, have created narrow profit margins across restaurants and hotels, particularly for small and mid-sized operators. Additionally, regulatory requirements in food safety, labor compliance, and environmental standards added operational complexity. Still, opportunities remain strong for suppliers that can offer differentiated products, sustainability solutions, or labor-saving formats aligned with evolving consumer expectations.

Meanwhile, Chile’s fine dining scene is flourishing, underscored by the inclusion of seven local establishments in [Latin America’s 50 Best Restaurants](#) list for 2024. This recognition reflects a growing appreciation for innovative cuisine that highlights indigenous ingredients and Asian-inspired flavors. The fast-food segment, particularly at burger restaurants, is experiencing robust growth, with value sales projected to rise by nine percent and burger outlets seeing an 18 percent increase. New shopping center developments and expanded dining options in existing malls present further opportunities for foodservice operators to attract customers. Collectively, these trends illustrate a dynamic and resilient restaurant industry in Chile, balancing affordability, quality, and innovation amid ongoing economic challenges.

Chile’s travel and tourism sector saw significant contributions to the economy, with \$35 billion added to the GDP in 2024, representing a 9.7 percent of the economy. This growth was driven by a record number of more than five million international tourists who visited the country, restoring and even surpassing pre-pandemic levels.

Table 1: Advantages and Challenges to Enter the HRI Foodservice Market

Advantages	Challenges
Clear rules and transparent regulations offered by the government allow fair competition.	There are strict sanitary and phytosanitary controls on imports.

Strong demand for food ingredients in the HRI sector.	Chile is an open and competitive market, which has 33 free trade agreements that cover 65 markets.
The U.S.-Chile Free Trade Agreement resulted in zero percent duties for all U.S. agricultural products as of January 1, 2015.	Relatively small-size market compared to neighboring countries.
Chile is a high-income country and could be a gateway to South American markets.	Strong competition from other suppliers such as Brazil, Argentina, and Paraguay.
U.S. brands are regarded as high quality. Many U.S. brands are well-known and present in the market.	Chileans are price-sensitive, especially during economic slowdowns.
Equal playing field for imported and local products.	

Section II: Roadmap for Market Entry

Entry Strategy

Potential exporters should work closely with Chilean importers or agents to confirm that their products comply with Chilean regulations. FAS Santiago maintains listings of potential importers and develops sector-specific information to help introduce U.S. agricultural products in Chile. Further details on both import regulation and market opportunities are available at the following links: [Chile: Exporter Guide](#), [Chile: FAIRS Export Certificate Report](#), and [Chile: FAIRS: Country Report](#).

FAS Santiago recommends that U.S. exporters exhibit or attend Chilean trade shows, particularly the U.S. Pavilion at the [Espacio Food & Service](#) show (September 29 – October 1, 2026). The show is recognized as the most important annual gathering in the Chilean food industry and provides the opportunity to connect with over 28,000 Chilean and international buyers.

Critical considerations for market entry include the following:

- Hotels, restaurants, and foodservice companies most often purchase through intermediaries such as distributors, importers, or wholesalers. Many of these firms are based in Santiago. Chain restaurants, that often manage larger volumes, may import directly.
- U.S. exporters seeking to access the Chilean HRI market should identify an importer that specializes in distributing to the sector and be prepared to offer small quantities of products or mixed containers, as individual HRI firms may not be able to manage entire container volumes.
- U.S. products are presumed consistent and high quality.
- The business culture and customs in Chile are conservative and characterized by the importance of personal contact and face-to-face interaction. Contact initiated via e-mail

will be less effective than in-person interactions. Business meetings and practices in general are like those of the United States.

- Overseas suppliers are encouraged to maintain a Chilean representative or agent that understands the market, has access to a network of contacts and can provide support.

Market Structure and Distribution

The most common distribution channels for the HRI sector are local importers and distributors. These distributors may also distribute products to supermarkets, wholesalers, and institutional foodservice companies. In general, hotel operators and restaurants do not import directly, though there are a few exceptions. Hotels usually purchase from distributors to gain access to a larger variety of products without managing complex import procedures. Hotel operators may also prefer as few distributors as possible to reduce complexity (see Figure 1).

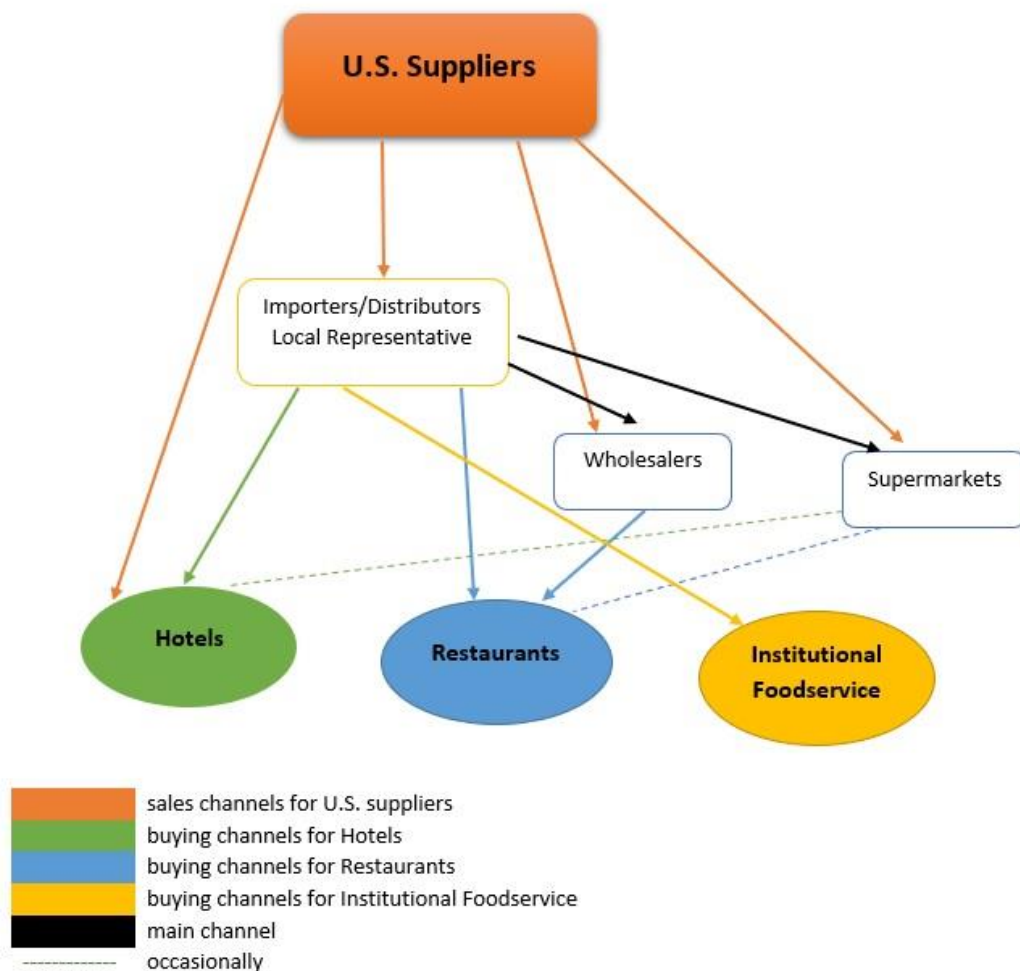
Chain restaurants deal with higher volumes, which increase their purchasing and negotiation power with distributors. In contrast, independent restaurants are more dependent on the range and quality of products already managed by distributors. Both rely on food products from local wholesalers as well as imported products from importers/distributors.

The institutional foodservice sector buys most products from local distributors. Companies purchasing large quantities may also import directly when price, quality or other selection criteria are more favorable than domestic suppliers.

Recently, big box stores and traditional wholesalers have gained appeal to the HRI sector. Big box stores, like [*Central Mayorista*](#), [*Mayorista 10*](#), [*Alvi*](#) and [*Superbodega A cuenta*](#), are the Chilean equivalents to *Sam's Club* or *Costco* and have become important suppliers to small HRI firms. *PriceSmart*, the U.S.-based wholesale club chain, announced its entry into Chile, with plans to open its first three locations in Santiago in 2026

Because of the COVID-19 lockdown, many wholesalers opened to the end consumers and to smaller HRI firms either directly or via online platforms. Wholesale suppliers such as [*Bidfood S.A.*](#), [*Agrosuper Food Service*](#), [*Alimentos Vida Estable*](#), [*Buena Carne*](#), [*Frio Food*](#), [*Socosur*](#), [*ICB Foodservice*](#), [*Carozzi Food Service*](#), [*Food & Beverage Supply*](#), [*Macro Foods*](#), [*Mil Sabores Foods*](#), and [*Comercial Alisur*](#) are actively targeting individuals and small businesses.

Figure 1: HRI Supply Chains



Sub-Sector Profiles

Hotels – The hotel sector in Chile consists of domestic and international chains, boutique hotels, hostels, and short-term rentals like [Airbnb](#). According to the Chilean National Statistics Institute (INE), tourist accommodations in Chile increased by four percent in 2024, with almost 20.1 million overnight stays recorded nationwide. The report stated that the Santiago Metropolitan region had the highest number of overnight stays, followed by the Valparaíso region, where the port city attracts many tourists. According to the Undersecretariat of Tourism and the National Tourism Service (*Sernatur*), Chile’s hotel sector experienced a significant recovery in 2024, welcoming a record of more than 5.2 million tourists. This figure represents a 40.4 percent increase compared to 2023 and marks the highest level since the onset of the pandemic, establishing 2024 as the year of tourism recovery in Chile. The leading source countries for visitors were Argentina (39.9 percent), Brazil (15.0 percent), and the United States (4.8 percent). Additionally, there was notable growth in arrivals from Colombia, Uruguay, Mexico, and various European countries.

The top international chain hotels in Chile are [Accor Group](#), [Marriott International](#), [IHG Hotels, NH Hotel Group S.A.](#), [Hilton Worldwide Inc.](#), [Hyatt Hotels Corporation](#), and [Mandarin Oriental International Limited](#).

Supply of hotel rooms in the market remains relatively tight. Industry reports that as many as 21 new luxury hotels will be developed in the next five years. Similarly, niche markets, like enotourism and eco-friendly hotels offer prospects.

Restaurants – Chile is home to many international and domestic restaurants. Both fast-food and full-service restaurants are commonplace. Use of e-commerce platforms like [Uber Eats](#), [Rappi](#) and [PedidosYa](#) for food have grown dramatically. Delivery services and take out remain more popular than pre-pandemic; in 2024 they represented 45 percent of food service sales value.

Full-service restaurant sales in 2024 reached \$1.2 billion, with 3,778 outlets. Nui Sushi is the leading player with a full-service chain restaurant value share of 9 percent, as the main provider of sushi in Chile. To achieve this, Nui Sushi leveraged delivery apps and online ordering, with home delivery accounting for 65 percent of its sales. The brand developed its own online ordering channel and delivery fleet, resulting in 80 percent of delivery sales.

Home delivery and online ordering are expected to grow in the coming years, accounting for 25 percent and 30 percent of fast-food chains' total sales, respectively. Consumers are accustomed to using delivery applications, and restaurants highlight online sales as the most important area to develop.

Table 2: Chilean Full-service Chain Restaurants

Restaurants	Percent Market Share
Niu Sushi (<i>Distribuidora y Comercializadora de Alimentos Oji Ltda.</i>)	38.7
Domino Fuente de Soda (<i>Comercial Central Alimentos Ltda.</i>)	16.7
Johnny Rockets (<i>Johnny Rockets Group, Inc.</i>)	13.8
Mamut Restaurants (<i>Gastronomía y Negocios S.A.</i>)	6.7
Emporio La Rosa (<i>Emporio La Rosa S.A.</i>)	5.1
Bariloche Restaurant (<i>Bariloche Restaurant S.A.</i>)	3.5
Tip & Tap (<i>Tip & Tap S.A.</i>)	2.7
Chili's Grill & Bar (<i>Brinker International, Inc.</i>)	2.7
Sakura Express (<i>Comercial Gastronómica Fisol Ltda.</i>)	2.3
Le Fournil (<i>Empresas Carozzi S.A.</i>)	2.3
Santa Brasa (<i>Civitano S.A.C.</i>)	2.0
PF Chang's China Bistro (<i>PF Chang's China Bistro, Inc.</i>)	1.9
Ruby Tuesday (<i>Ruby Tuesday Inc.</i>)	1.1
Tony Roma's (<i>Romacorp Inc.</i>)	0.6

Source: Euromonitor

Table 3: Largest Fast-Food Chains

Restaurants	Percent Market Share
<u>McDonald's</u> (<i>Inversiones Arcos Dorados Chile Spa.</i>)	22.1
<u>Papa John's</u> (<i>Papa John's Int'l., Inc.</i>)	15.1
<u>Doggis</u> (<i>Gastronomía y Negocios S.A.</i>)	10.1
<u>KFC</u> (<i>Yum! Brands, Inc.</i>)	8.8
<u>Burger King</u> (<i>Restaurant Brands International, Inc.</i>)	6.9
<u>Subway</u> (<i>Doctor's Associates, Inc.</i>)	5.4
<u>Pollos Tarragona</u> (<i>Distribuidora Montserrat S.A.</i>)	4.0
<u>Savory Stop</u> (<i>Unifood S.A.</i>)	3.7
<u>Little Caesar's Pizza</u> (<i>Ilitch Holdings, Inc.</i>)	2.8
<u>Castaña</u> (<i>Elaboradora de Alimentos Frutale Ltda.</i>)	2.4
<u>Domino's Pizza</u> (<i>Domino's Pizza Inc.</i>)	2.0
<u>TelePizza</u> (<i>Tasty Bidco SL</i>)	1.9
<u>Yogen Früz</u> (<i>Yogen Früz Canada, Inc.</i>)	1.8
<u>Pizza Pizza</u> (<i>Pizza Pizza Ltd.</i>)	1.6
<u>Melt Pizza</u> (<i>Administradora Victoria Food & Retail S.A.</i>)	1.5
Others	9.9

Source: Euromonitor

Table 4: Largest Cafés and Bars

Cafés/Bars	Percent Market Share
<u>Starbucks</u> (<i>Starbucks Corp.</i>)	62.1
<u>Dunkin' Donuts</u> (<i>Inspire Brands, Inc.</i>)	18.9
<u>Juan Valdez</u> (<i>Federación Nacional de Cafeteros de Colombia</i>)	3.4
<u>Tavelli</u> (<i>Tavelli S.A.</i>)	3.2
<u>Cory</u> (<i>Empresas Carozzi S.A.</i>)	3.0
<u>Santander Work/Café</u> (<i>Eventos y Cafeteria Cofi Ltda.</i>)	2.4
<u>Café Mokka</u> (<i>Comercial Café Mokka Ltda.</i>)	2.0
<u>Coppelia</u> (<i>Coppelia S.A.</i>)	1.9
Others	3.1

Source: Euromonitor

Cafés/Bars – In 2024, cafés and bars saw a seven percent increase in sales, reaching \$885 million. There are now 3,189 outlets, with juice/smoothie bars experiencing the highest growth rate at 11 percent and reaching \$4 million in sales. *Starbucks Coffee Chile S.A.* held the largest foodservice value market share at 16 percent.

Institutional Food Service – The Chilean institutional sector includes health care providers, educational facilities, large companies, airlines, and the military. Mining and education are the two largest institutions in the Chilean paradigm. These institutions are generally served by large catering firms. The five largest are: [Sodexo Chile, S.A.](#), [Central de Restaurantes Aramark](#), [DeliBest](#), [Newrest Chile](#), [Aliservice](#), and [Genova Ausolan](#). At the time of writing, Aramark was the largest holding close to 61 percent of the Chilean market.

Section III: Competition

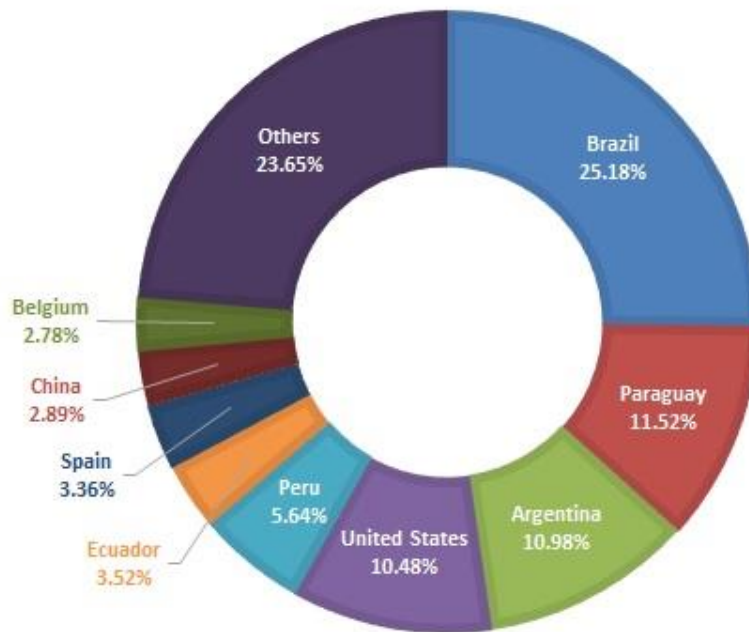
The United States and Chile have long been strategic trading partners, though the relationship has grown rapidly since the signing of the U.S.-Chile Free Trade Agreement (FTA) in 2015, when all duties were removed under terms of the FTA.

Chile is the fourth largest market in South America for U.S. consumer-oriented agricultural products, with \$562 million of exports in 2024. Competition from MERCOSUR and regional suppliers remains fierce for consumer-oriented products, grains, soybean products, and pet food.

In 2024, the top suppliers of consumer-oriented agricultural products to Chile were Brazil, Paraguay, Argentina, and the United States. (See Figure 2).

- Brazil was the top supplier of consumer-oriented products with a market share of 25.18 percent. Top Brazilian exports to Chile are beef, pork, poultry, chocolate (cocoa products), and pet food.
- Paraguay was the second largest supplier of consumer-oriented products to Chile with a market share of 11.52 percent after Brazil. Paraguay's main export to Chile is beef, which is very price-competitive within Mercosur suppliers.
- Argentina was the third largest supplier of consumer-oriented products to Chile with a market share of 10.98 percent. Argentina's main exports to Chile include beef, dairy products, pet food, bakery goods and pasta, and processed vegetables.
- The United States was the fourth largest supplier of consumer-oriented products to Chile, with 10.48 percent market share. The main U.S. exports are dairy products, condiments and sauces, pork, food preparations, beef, pork, poultry, pet food, and beer. In 2024, the United States exported \$102 million in dairy products, \$59 million of food preparations, and \$58 million in beef. U.S. exports of condiments and sauces have nearly doubled since 2015, increasing from \$30 million to \$63 million in 2024, with about half of this value derived from mayonnaise.

Figure 2: Chilean Imports of Consumer-Oriented Products from the World in 2024 (%)



Source: Chilean National Customs Office

Section IV: Best Product Prospects

Best product prospects for the Chilean market are:

Top Consumer-Oriented Products Imported from the World



Source: Trade Data Monitor

Top Consumer-Oriented Products Imported from the United States



Source: Trade Data Monitor

The best product prospects are divided into three categories listed below:

Products Present in Market with Good Sales Potential

- Dairy products (cheese and ice cream)
- Pulses
- Beef and beef products
- Pork and pork products (bacon)
- Poultry and poultry products
- Sauces, condiments, and seasonings
- Premium coffee
- Tree nuts
- Craft beer

Products Not Present in Market with Good Sales Potential

(Products consumed in Chile in small quantities that have none or few U.S. suppliers)

- Distilled spirits
- Processed fruit and vegetables
- Chocolate and cocoa products
- Soup and other food preparations
- Edible oils
- Snack foods
- Eggs and products
- Flours and starches
- Bakery goods, cereals, and pasta

Products Not Present in Market due to Significant Barriers

Products do not face significant trade barriers to enter the Chilean market. On the contrary, Chile's 31 trade agreements with 65 markets makes it one of the most open economies in the world. Products from many global suppliers are available in the Chilean market.

Section V: Key Contacts and Further Information

Chilean Restaurant Association (ACHIGA) Nueva Tajamar 481 Of. 704, Torre Norte – Las Condes Tel: +56 2 2203 6363 www.achiga.cl	Chilean Hotels Association (HOTELGA) Nueva Tajamar 481 Of. 806, Torre Norte – Las Condes Tel: +56 2 2203 6344 secretaria@hoteleros.cl www.hoteleros.cl
National Chamber of Commerce (CNC) Address: Merced 230, Santiago Tel.: +56 2 2365 4000 cnc@cnc.cl www.cnc.cl	SEREMI de Salud (Health Ministry) Pedro Miguel de Olivares 129, Santiago Tel: +56 2 2576 4989 www.asrm.cl
Agriculture and Livestock Service (SAG) Av. Pdte. Bulnes 140 – Santiago Tel: +56 2 2345 1100 www.sag.cl	

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Attachments:

No Attachments