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Report Highlights:

The Chilean food processing industry is highly developed and competitive sector, playing a crucial role in the national economy. Chile continues to leverage its position as a global exporter of high-quality raw materials while relying on international partners for advanced technology and specialized ingredients. U.S. exporters are well-positioned to fill this demand, benefiting from a trade environment that eliminates tariffs and prioritizes innovation. Bolstered by efficient logistics through the seaports such as San Antonio port, and strong institutional frameworks, the Chilean food industry now represents 18 percent of GDP. The Chilean food processing industry is driven by health trends, sustainability, and exports.

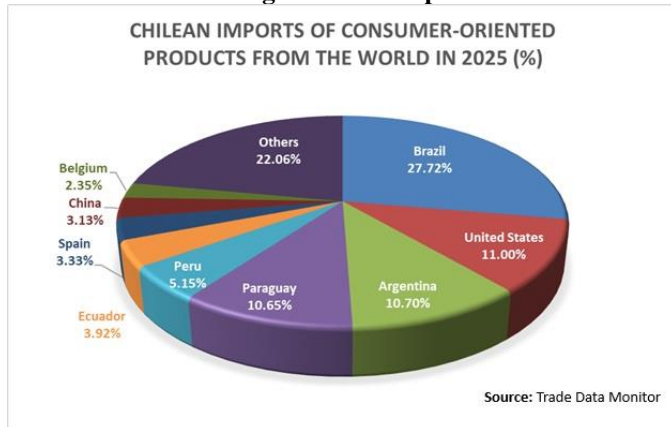
MARKET FACT SHEET: CHILE

Executive Summary:

Chile is a high-income country and in 2025, Chile’s Gross Domestic Product (GDP) reached approximately \$364 billion, positioning the country as one of the most stable and competitive economies in Latin America. Chile is a world-class producer of minerals and agricultural products, acting as a leading player in the global marketplace, particularly as the top global producer of copper and a key provider of lithium and fresh fruit.

For 2026, the Chilean Central Bank projects a GDP growth that will range between 2.0 and 3.0 percent.

Consumer-Oriented Agricultural Imports 2025



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 2025, consumer-oriented agricultural exports totaled \$599 million, comprising over 63 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 products, pork and products, poultry and products, pet food, beer, tree nuts, and distilled spirits.

Food Retail Industry:

Chile’s food retail sales reached \$30.2 billion in 2025. The growth forecast for 2026 follows the food industry trend at 5.0 percent expected growth. Despite a perceived slowdown in sales, the four largest retailers, Walmart Chile, *Cencosud*, *SMU*, and *Tottus*, plan to maintain investments in Chile’s market.

Food Processing Industry:

Chile’s food industry is comprised of 31,000 registered companies; approximately 96 percent of them are small and medium-sized companies. Food processing sales are a major focus in the domestic market, which accounts for 60 percent of revenues, while the remaining 40 percent is driven by Chile’s robust export orientation in processed fruits, salmon, and beverages.

Food Service Industry:

Chile’s food service sales reached approximately \$9.1 billion in 2025. The forecast for 2026 projects a moderate 3.5 percent growth compared to 2025 as the industry enters a

normalization phase following the rapid post-pandemic recovery. Despite this, the sector remains a key pillar of domestic demand, with consumers increasingly prioritizing convenience and high-quality “away-from-home” dining experiences.

Quick Facts CY 2025

Chile Food & Ag Exports to the World (U.S. billion): \$26.57

Chile Food & Ag Imports from the World (U.S. billion): \$11.23

Imports of Consumer-Oriented Products: \$599 million

Top Ten U.S. Ag and Related Products Exports to Chile:

1. Feed and Fodders
2. Dairy Products
3. Wheat
4. Beef and Products
5. Food Preparations
6. Condiments and Sauces
7. Poultry and Products
8. Tree Nuts
9. Pork and Products
10. Chocolates

Food Industry by Channels (U.S. billion) 2025:

Retail Food Industry	\$30.20
Food Processing	\$24.60
Supermarket Only Food Sales	\$18.58
Food Service-HRI	\$ 9.10

Top Retailers in Chile: (based on sales)

1. Walmart Chile (Líder, Express de Líder, Super Bodega, aCuenta, and Central Mayorista)
2. Cencosud (Jumbo, Santa Isabel, and Spid)
3. SMU (Unimarc, Mayorista 20, Alvi, and Maxi Ahorro)
4. Falabella (Tottus)

GDP/Population 2025:

Population (*millions*): 19.9
 GDP (*billions USD*): \$364
 GDP per capita (*USD*): \$ 36,181

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Chile has a high per capita income	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 1: Market Summary

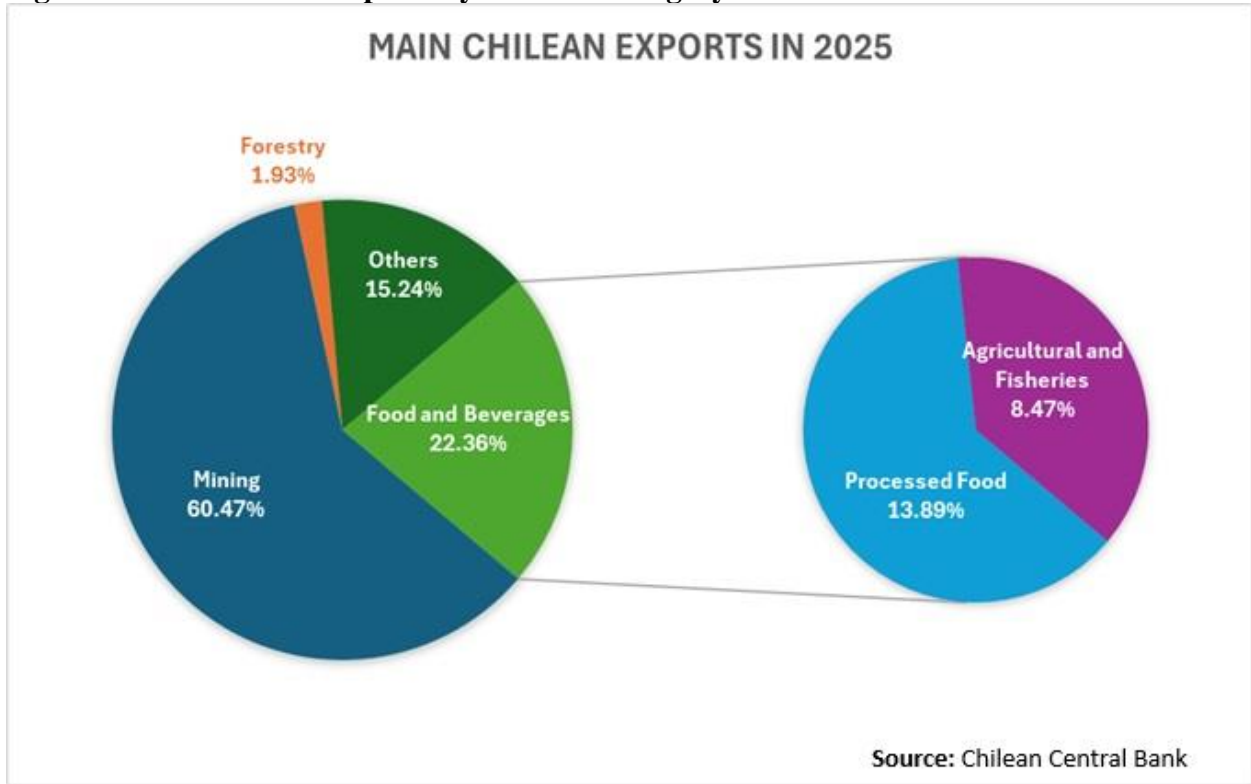
Chile's open economy supports a developed and competitive food industry, with the food processing sector representing one of the country's largest economic segments. In 2025, this sector maintained its contribution of 4.7 percent to the national GDP and accounted for 22.3 percent of total exports, valued at \$24.6 billion. Renowned for premium products such as salmon, fresh fruit, and wine, Chile leverages its vast network of trade agreements, including key partnerships with the United States, China, and the EU, to reach over 180 countries. While the nation is a leading global supplier, it remains a net importer of essential commodities like wheat, corn, beef, and dairy products to bridge gaps between domestic production and consumption needs.

The industry is defined by its adaptability, emphasizing quality, traceability, and stringent food safety regulatory standards to maintain its international reputation. Domestically, 54 percent of food production is consumed within the country, supported by a diverse ecosystem of 27 subsectors. Notably, Chile's regulatory environment, which mandates clear labeling for products high in sugar, calories, sodium, and saturated fats, has spurred processors to reformulate products.

Chile's business climate in 2025 remains robust and resilient, underpinned by stable macroeconomic policies, a transparent regulatory environment, and a strong commitment to international trade. The country's open market orientation and well-established trade agreements continue to attract foreign investment, particularly in sectors such as food processing, where Chile leverages its rich agricultural resources and advanced logistics infrastructure. Despite global economic uncertainties, Chile's diversified export base has helped sustain investor confidence and economic growth.

Market dynamics in the food processing sector are shaped by evolving consumer preferences, increasing demand for value-added products, and a growing emphasis on sustainability and traceability. These trends are driven by rising incomes, greater health awareness, and Chile's strategic positioning as a supplier to both regional and global markets. Looking ahead, the sector is expected to benefit from continued innovation and digitalization. Forecasts indicate steady growth, with opportunities emerging in premium, organic, and functional food segments, as well as in the expansion of export markets, particularly in Asia and North America.

Figure 1: 2025 Chilean Exports by Product Category



Advantages and Challenges

ADVANTAGES	CHALLENGES
The United States is a strong trading partner for Chile: the U.S.-Chile Free Trade Agreement (FTA) facilitates commerce.	Chilean importers prioritize quality ingredients and traceability of those products, while also being price-sensitive, particularly during economic slowdowns.
The United States is recognized as a reliable supplier of high-quality food products.	Chilean consumers are used to competitive prices due to the openness of the economy.
The domestic processing industry highly values Research & Development in the U.S. food industry.	The United States competes with MERCOSUR and European countries in the ingredients sector.
Demand for healthier ingredients has increased.	Import procedures are a burden, especially for new-to-market U.S. companies of small/medium size.
U.S. products and ingredients are perceived as innovative and trendy, and Chilean consumers are likely to pay higher prices for them.	Transportation costs can make sourcing products and ingredients from the United States cost-prohibitive.

Consumers' demand for premium processed foods and beverages continue to increase year after year.	
Chilean food processing companies use global certifications and standards.	

Section 2: Roadmap for Market Entry

Entry Strategy

Chile is a highly competitive market for food ingredients, including fruits, vegetables, grains, spices, food additives, flavorings, and more. Prospective U.S. exporters should consider Chile as a stable market. U.S. exporters of food ingredients have three main ways of entering the Chilean market:

- *By selling to importers/distributors.* Smaller processors are more likely to buy from Chilean importers/distributors. Importers and distributors offer various packaging, quality control, and inspection services.
- *Exporting directly to Chilean companies.* Larger food processors prefer to buy directly from exporters to benefit from competitive prices and avoid paying commissions to intermediaries; or
- *Establish a local subsidiary or set up a regional office.* U.S. food ingredient exporters that plan to sell large volumes of their products can establish a local subsidiary or set up a regional office. Once successfully established, these producers may expand operations and use Chile as an exporting platform for other countries in Latin America. Establishing domestic production guarantees customer service, product quality, and helps establish a solid local presence.

The use of distributors, agents, or representatives depends on the type of product and the size of the food processing company.

Personal relationships are essential in Chile. Post recommends building connections to become a trusted business partner. These connections may rely on good customer services, personal visits, and extensive follow-up. A personal relationship can be achieved either directly or by hiring a local representative. It is worth noting that the reputation of a U.S. supplier is strongly influenced by the quality of its representative.

U.S. suppliers should offer solid business proposals to potential buyers that compete in quality, price, and payment conditions. Exporters of new-to-market products should approach buyers with a well-organized plan that outlines product specifications, shipment terms, and financial obligations.

Import Procedures

For details on how to export to Chile, please refer to Chile's Global Agricultural Information Network (GAIN) reports: [Exporter Guide](#), [FAIRS Export Certificate Report](#), [FAIRS Country Report](#), and [2016 Nutritional Labeling and Advertising Law](#).

Distribution Channels

The distribution flow of food ingredients varies based on the origin of the ingredients and the size of the food processor. Local ingredients are primarily sourced directly from producers, whereas foreign products are purchased from distributors and importers of food ingredients. Larger food processors are able to import directly due to their higher production volumes and expertise.

Market Structure

According to data from the Chilean Internal Revenue Service (SII), in 2025, there were 31,000 food and beverage processing companies in Chile, which represents 2.4 percent of the total number of companies in the country. Chilean food processing companies sell 60 percent of all packaged food products to supermarkets and hypermarkets. Meanwhile, 38 percent of packaged food is sold through traditional grocery retailers such as independent small grocers or food/drink specialists. *Agrosuper*, *Nestlé Chile*, *Empresas Carozzi S.A.*, and *Coca-Cola* are among the largest food and beverage processing companies in Chile.

According to Chilean Food Processing Companies Association ([Chilealimentos A.G.](#)), the Chilean food industry mainly produces processed fruit and vegetables; chocolates and confectionary products; wine, beer, and drinks; beef, pork, and poultry products; potato chips and similar snacks; dairy products; frozen meals; pasta and noodles; oils; sugar and sweeteners; pet food; breakfast cereals; and seafood.

Share of Major Segments in the Food Processing Industry

The industry is structured into three main segments:

1. Large multinational and national companies, who dominate key categories like dairy, meat, and beverages. Companies like *Nestlé Chile*, *Empresas Carozzi S.A.*, *Agrosuper*, *Watt's Alimentos*, and *Embotelladora Andina S.A.*,
2. Mid-sized processors and specialized brands with focus on value-added products, such as organic, gourmet, and functional foods. Companies like *Quillayes-Surlat* and *Iansa*, and
3. Small and artisanal producers with emphasis on local ingredients, sustainability, and traditional recipes. Their products are often found in premium and niche markets.

Company Profiles & Company Products

Table 2: Main Food Processing Companies in Chile

Company	Key Products	Websites
<i>Agrosuper S.A.</i>	Chicken, pork, turkey, salmon, and processed foods	www.agrosuper.cl
<i>Embotelladora Andina S.A.</i>	Bottled fruit drinks, mineral water, energy drinks, iced tea, carbonated beverages, including Coca-Cola beverages, and also processed fruit	www.koandina.com
<i>Empresas Carozzi S.A.</i>	Pasta, rice, noodles, chocolates and candies, snacks, marmalades, breakfast cereals, confectionary, sauces, tomato paste, desserts, fruit pulp, flour, beverages, olive oil, and pet food	www.carozzicorp.com
<i>Evercrisp Snack Productos de Chile S.A. (PepsiCo, Inc.)</i>	Snacks, potato chips, cookies, breakfast cereals, oat products, soft drinks, energy drinks, iced tea, cranberry juice, and orange juice	www.pepsico.cl/
<i>Nestlé Chile S.A.</i>	Coffee, dried milk, baby food and purees, breakfast cereals, chocolates, cookies, candies, dairy products, pet food, ice cream, infant formula, sauces and condiments, and senior formula.	www.nestle.cl
<i>Tresmontes Lucchetti S.A. (Grupo Nutresa)</i>	Pasta, snacks, canned tuna, powdered chocolate, instant coffee, tomato sauces, soups, cooking oil, tea, and powdered juices.	www.tmluc.cl
<i>Watt's Alimentos S.A.</i>	Fruit (including juices, nectar, jam); dairy products; oil (cooking oil and margarines); frozen fruit and vegetables; fresh pasta; canned legumes and fruits, and wine.	www.watts.cl
Source: Based on company interviews. Alphabetically sorted.		

Section 3: Competition

There are significant opportunities for imported food ingredients in Chile, as the food processing industry imports half of all ingredients. Argentina is the top supplier, sending mostly corn, vegetable oils, beef, sugar and sweeteners, and wheat (Table 3). From Brazil, Chile imports beef, pork, poultry, dextrin, peptones and cocoa products. From Paraguay, Chile imports beef, corn, rice, vegetable oils, and milled grains. The United States is the fourth-largest supplier of food ingredients to Chile, providing dairy products, beef, wheat, condiments and sauces, poultry, and tree nuts (Table 4). Peru supplies mostly fresh fruit, chocolate and cocoa products, palm oil, vegetable oils, and dairy products.

Table 3. Chilean Food Ingredients Imports from the World (by country)

Partner Country	Import Value		Share (%)	Variation (%)
	2024	2025	2025	2024/2025
World	\$6,652,068,379	\$7,093,134,270	100	6.63
Argentina	\$1,756,970,070	\$1,853,451,882	26.13	5.49
Brazil	\$1,565,403,930	\$1,791,403,152	25.26	14.44
Paraguay	\$837,921,318	\$954,676,770	13.46	13.93
United States	\$580,977,593	\$588,960,067	8.30	1.37
Peru	\$300,681,217	\$294,214,957	4.15	-2.15
Ecuador	\$176,545,531	\$211,238,982	2.98	19.65
Canada	\$146,016,957	\$200,362,939	2.82	37.22
Colombia	\$144,718,607	\$137,490,973	1.94	-4.99
China	\$97,025,783	\$116,405,936	1.64	19.97
Spain	\$83,495,027	\$91,755,433	1.29	9.89
Uruguay	\$179,547,380	\$85,127,046	1.20	-52.59
Germany	\$98,860,175	\$75,316,360	1.06	-23.82
Mexico	\$83,533,993	\$63,173,256	0.89	-24.37
Italy	\$46,979,026	\$59,985,413	0.85	27.69
Others	\$553,391,777	\$569,571,104	8.03	2.84
Source: Trade Data Monitor, LLC				

Note: Ingredients include the following categories of products: Animal Fats; Beef & Beef Products; Chocolate & Cocoa Products, Coarse Grains (ex. Corn), Cocoa Beans, Coffee, Roasted and Extracts, Coffee, Unroasted; Condiments & Sauces, Corn, Dairy Products, Dextrin, Peptones & Proteins, Eggs & Products, Essential Oils, Fresh Fruit; Fresh Vegetables; Fruit & Vegetable Juices, Industrial Alcohol & Fatty Acids, Milled Grains & Products, Oilseeds, Palm Oil, Peanuts, Pork & Pork Products; Poultry Meat and Products; Pulses, Rice, Soybean Oil, Spices, Sugar & Sweeteners, Tree Nuts, Vegetable Oils, and Wheat

Table 4. Chilean Imports of Food Ingredients from the United States by Product

Partner Country	Import Value		Share (%)	Variation (%)
	2024	2025	2025	2024/2025
Total	\$580,977,593	\$588,960,067	100	1.37
Dairy Products	\$102,694,148	\$123,902,676	21.04	20.65
Beef & Beef Products	\$58,875,953	\$79,268,835	13.46	34.64
Wheat	\$106,639,631	\$69,446,257	11.79	-34.88
Condiments & Sauces	\$63,797,208	\$63,514,331	10.78	-0.44
Poultry Meat & Products (ex. eggs)	\$40,599,707	\$54,761,660	9.30	34.88
Tree Nuts	\$27,621,060	\$40,169,089	6.82	45.43
Pork & Pork Products	\$45,805,793	\$28,190,576	4.79	-38.46
Essential Oils	\$20,409,993	\$22,292,394	3.79	9.22
Dextrins, Peptones, & Proteins	\$14,580,639	\$17,814,543	3.02	22.18
Vegetable Oils	\$39,526,899	\$17,807,674	3.02	-54.95
Chocolate & Cocoa Products	\$16,629,656	\$16,319,256	2.77	-1.87
Fresh Fruit	\$13,181,429	\$15,175,543	2.58	15.13
Coffee, Roasted and Extracts	\$9,134,621	\$9,243,364	1.57	1.19
Animal Fats	\$3,050,672	\$6,985,588	1.19	128.99
Sugars & Sweeteners	\$4,022,066	\$5,429,606	0.92	35
Pulses	\$3,903,005	\$5,102,899	0.87	30.74
Corn	\$767,766	\$2,568,537	0.44	234.55
Milled Grains & Products	\$2,236,277	\$2,558,974	0.43	14.43
Fruit & Vegetable Juices	\$1,057,328	\$1,372,462	0.23	29.8
Fresh Vegetables	\$1,046,924	\$1,322,370	0.22	26.31
Soybean Oil	\$1,238,004	\$1,198,994	0.20	-3.15
Industrial Alcohols & Fatty Acids	\$1,969,848	\$1,130,093	0.19	-42.63
Eggs & Products	\$770,941	\$1,035,986	0.18	34.38
Oilseeds	\$311,403	\$894,505	0.15	187.25
Spices	\$541,890	\$774,605	0.13	42.95
Rice	\$413,864	\$669,660	0.11	61.81
Coarse Grains (ex. corn)	\$39,321	\$8,778	0	-77.68
Coffee, Unroasted	0	\$554	0	0
Peanuts	\$111,543	\$262	0	-99.77
Cocoa Beans	0	0	0	0
Palm Oil	0	0	0	0

Source: Trade Data Monitor, LLC

The United States and Chile are strategic partners whose agricultural relationship has been guided by collaboration and trade capacity building, allowing Chile to become a regional leader with a competitive market. In 2025, U.S. agricultural and related exports to Chile totaled \$948.3 million. The United States is the fourth largest supplier of agricultural and related products to Chile, after Argentina, Brazil and Paraguay, holding a 9.5 percent market share.

Chile is the third largest market in South America for U.S. agricultural products, after Colombia and Brazil. In 2025, consumer-oriented agricultural exports summed \$599 million, comprising

over 63 percent of all U.S. agricultural exports to Chile. Competition from MERCOSUR and regional suppliers remains fierce for consumer-oriented products, grains, soybean products, and pet food.

Section 4: Best Product Prospects

Chile dropped all tariffs on agricultural products to zero as of January 2015, due to the U.S.-Chile Free Trade Agreement. The United States and Chile are strategic partners whose agricultural relationship has been guided by collaboration and trade capacity building, allowing Chile to become a regional leader with a competitive market.

Figure 2 shows the ingredients with the top prospects in Chile in 2026. All the ingredients in Table 5 had high levels of import value and growing consumption trends. The ingredient with the highest import value in 2025 was wheat, which Chilean mills use to manufacture bread, pasta, and other bakery products. Additionally, beef, cheese, condiments, and sauces rank among the top imported products, serving the food processing industry, foodservice, and retail sector.

Figure 2 – 2025 Sales of Top Ingredients with Strong Sales Potential

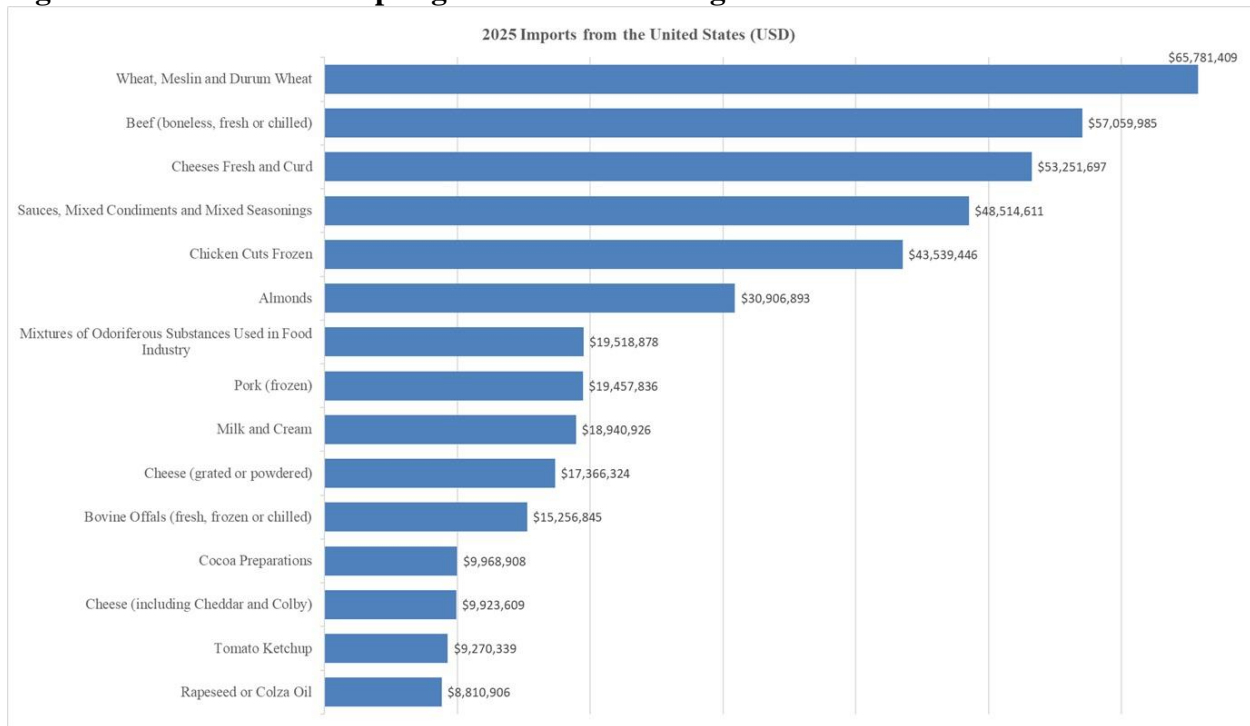


Table 5: Products with Good Sales Potential

Products present in the market which have good sales potential	Products not present in significant quantities, but which have good sales potential
<ul style="list-style-type: none"> ● Wheat ● Bakery Ingredients 	<ul style="list-style-type: none"> ● Flours and starches ● Plant extracts

<ul style="list-style-type: none"> ● Essential oils (beverage industry) ● Vegetable oils ● Condiments and sauces (mayonnaise, ketchup, BBQ sauce, and salad dressing) 	<ul style="list-style-type: none"> ● Animal and vegetable fats or oils ● Corn ● Whey ● Peptones and other protein derivatives
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Section 5: Key Contacts and Further Information

Ministry of Agriculture - Office of Agricultural Policies and Studies (ODEPA) Teatinos 40 Piso 7 – Santiago Tel.: +56 2 800-360-990 www.odepa.gob.cl	Ministry of Economy, Development and Tourism National Institute of Statistics (INE) Morandé 801 Piso 22 – Santiago Tel.: +56 2 3246-1010 – 3246-1018 ine@ine.cl www.ine.cl
Ministry of Agriculture - Agriculture and Livestock Service (SAG) Av. Bulnes 140 – Santiago Tel.: +56 2 2345-1100 Office Directory: https://www.sag.gob.cl/directorio-oficinas www.sag.gob.cl	Ministry of Health Seremi de Salud (SEREMI) Padre Miguel de Olivares 1229 – Santiago Office Directory: https://www.minsal.cl/secretarias-regionales-ministeriales-de-salud/ https://seremi13.redsalud.gob.cl/
Chilean Institute of Public Health Av. Maratón 1000 – Ñuñoa, Santiago Tel.: +56 2 2575-5101 - 2575-5202 oirs@ispch.cl www.ispch.cl	Instituto de Nutrición y Tecnología de los Alimentos – INTA Universidad de Chile Av. El Líbano 5524 Casilla 138 Correo 11 Santiago Tel.: +56 2 2978-1411 / 2978-1400 www.inta.cl
National Customs Agency Plaza Sotomayor 60 – Valparaíso Tel.: +56 2 600-570-7040 www.aduana.cl	

Agricultural Affairs Office Address: Av. Andrés Bello 2800, Las Condes Santiago, Chile www.usdachile.cl	Tel.: (56 2) 2330-3704 Email: agsantiago@usda.gov
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Attachments:

No Attachments