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Report Highlights:

Chile offers excellent export opportunities for U.S. food and beverage exporters. With the highest per capita GDP in Latin America, Chile is a growing export market for U.S. food suppliers, and a strong trading partner. The country's high-income consumers have a preference for imported products. Chile is the second top market for U.S. agricultural and related exports in Latin America, after Colombia. Best prospects for 2024 are: dairy products, pork, beef, and poultry products, condiments and sauces, beer and distilled spirits, and confectionery products.

MARKET FACT SHEET: CHILE

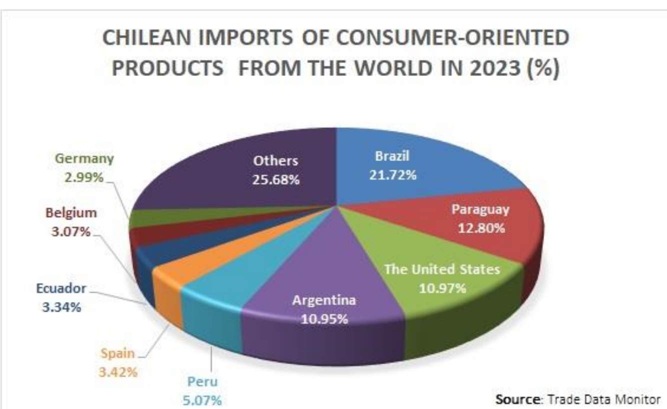
Executive Summary
Chile is a South American country that borders the Pacific Ocean, Argentina, Bolivia, and Peru. Chile is divided into 16 administrative regions. In 2022, Chile had a population of 19.6 million, with 8.3 million living in the Santiago Metropolitan region.

In 2023, Chile's Gross Domestic Product (GDP) in current prices totaled $340 billion, a 0.2 percent increase over 2022. For 2024, the Chilean Central Bank projects a GDP growth that will range between 1.25 and 2.25 percent with a concomitant recovery in consumption.

GDP per capita reached $30,208 PPP in 2023 (World Bank), leaving Chile as one of the highest per capita GDPs, in Latin America.

Chile's economy is driven by exports, concentrated primarily in the mining and agricultural sectors - fishery, forestry, and fresh fruit. In 2023, Chilean agriculture represented 8.5 percent of the country's GDP ($28.9 billion), 24.3 percent of exports ($23.6 billion), and employed around 10 percent of Chile's labor force.

Import of Consumer-Oriented Products
Chile is the second top market in South America for U.S. agricultural and related products and U.S. consumer-oriented products after Colombia. In 2023, consumer-oriented agricultural exports summed $539 million, comprising over 60 percent of all agricultural exports. The top U.S. consumer-oriented products exports to Chile are dairy products, condiments and sauces, pork, beef, poultry, food preparations, pet food, tree nuts, distilled spirits, chocolate and cocoa products, and beer.



Food Processing Industry
The food processing industry is one of the largest segments of the Chilean economy. The food and beverage processing industry represents 15.4 percent of Chile's exports, at $14.5 billion in 2023. The sector contributed 3.8 percent to national GDP in 2023 and employed over 360,000 workers.

Food Retail Industry
In 2023, the Chilean retail food industry witnessed a moderate recovery, with total sales reaching approximately $28.5 billion, a 2.3 percent increase over 2022. The Chilean retail sector is made up of large supermarkets, mid-sized grocery stores, convenience stores, and thousands of smaller independent mom-and-pop shops. Supermarkets and grocery stores remained the primary retail channels for food products, accounting for around 53.6 percent of the market share.

HRI Industry
Consumer foodservice industry changed significantly after the pandemic. The pandemic prompted many changes, with the advancement of online ordering and home delivery the most significant. For restaurants, online ordering developed from being almost insignificant in 2019 to representing 25 percent of value in 2023. This means that to be successful, restaurants now need to be able to develop an attractive online presence.

Quick Facts

Chile Food & Ag Exports (U.S. billion): $23.6
Chile Food & Ag Imports (U.S. billion): $10.7

Imports of U.S. Consumer-Oriented Products 2023: $539 million

Top Ten Ag and Related Products Exports to Chile:

1. Feeds and Fodders	2. Wheat
3. Dairy Products	4. Soybean Meal
5. Condiments and Sauces	6. Pork, and products
7. Poultry, and products	8. Beef, and products
9. Beer and Distilled Spirits	10. Food Preparations

Top Retailers in Chile:
1. Walmart Chile (Líder, Express de Líder, Super Bodega, aCuenta, and Central Mayorista)
2. Cencosud (Jumbo, Santa Isabel and Spid)
3. SMU (Unimarc, Mayorista 10, Alvi, Maxi Ahorro, and Mayorsa)
4. Falabella (Tottus)

Food Industry by Channels (U.S. billion) 2023:

Total Retail Food Sales	$28.9
Supermarket Only Food Sales	$15.5
Total Retail (includes non-food)	$56.9

GDP/Population 2023:
Population (millions): 19.6
GDP (billions USD): $340
GDP per capita (USD PP): $30,208 PPP

Sources: Trade Data Monitor (TDM), Euromonitor, World Bank, Chilean Central Bank, and trade interviews

Strengths/Weaknesses/Opportunities/Challenges

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

Data Sources: Global Agricultural Trade System, Trade Data Monitor, Chilean Central Bank, World Bank, Chilean National Institute of Statistics (INE), and Euromonitor

Section I: Overview

Chile is home to 19.6 million people, nearly half of which live in the capital region of Santiago. The country generally has open markets and the highest *per capita* income levels in the region at $30,208 (PPP) per person. Chile produces and exports large volumes of horticulture products, which are shipped to counter seasonal northern hemisphere markets. The Chilean food processing sector is highly developed; imports account for around half of all ingredients used domestically. The United States is a close trading partner and is considered by Chileans as a reliable supplier of high-quality food and agricultural products. In 2023, Chile exported 27.5 percent of its agricultural and related products to the United States, totaling $6.5 billion, and making it the top export market for this category of products.

U.S. agricultural exports to Chile totaled $1 billion in 2023, representing a five percent decrease from 2022. The United States is the fourth largest supplier of agricultural and related products to Chile, after Argentina, Brazil and Paraguay. Chile is also the second largest market in South America for U.S consumer-oriented agricultural products with $539 million worth of exports in 2023, after Colombia. Competition from MERCOSUR and regional suppliers remains fierce for consumer-oriented products, grains, soybean products, and pet food.

In 2022, Chile's economy experienced an annual inflation rate of 12.8 percent, the highest in three decades, driven by various macroeconomic factors. By 2023, inflation significantly decreased, ending the year at approximately five percent, according to projected target from the Chilean Central Bank. This reduction was achieved partly due to stringent monetary policy measures and adjustments in consumption and investment.

Chilean consumers increased the consumption of animal protein, creating opportunities for U.S. beef, pork, poultry, and dairy. Similarly, Chile's relatively high purchasing power is an opportunity for U.S. exports of beer, distilled spirits, condiments, and confections.

Table 1: Advantages and Challenges Facing U.S. Exporters

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

Section II: Exporter Business Tips

Higher value products are competitive in the Chilean market and Chilean consumers associate U.S. brands with quality. Additionally, Chilean consumers are loyal to some U.S. brands; a fact that could be leveraged by U.S. exporters. Exporters of new-to-market products should approach buyers with a well-organized plan that outlines product specifications, shipment terms, and financial obligations. There are many reliable and efficient Chilean importers and distributors. Most are open to meeting new suppliers in person or through virtual fora.

Chilean consumers are health-conscious, further shifting food demand toward products considered wholesome or healthy. This opens potential for products and ingredients marketed as natural. In addition to healthy products, many Chilean consumers can afford to buy high-end U.S. products like beef, pork, dairy products, and distilled spirits. Prepared food and ready-to-eat meals are now a part of many Chileans' diets due to quick preparation time, long shelf-life, and availability through many distribution channels. There is room in the market for innovation and meals that focus on health and wellbeing.

When exporting to Chile, consider these business tips:

1. **Understand Local Regulations**: Familiarize with Chile's import regulations, customs procedures, and any specific industry requirements. Compliance is crucial for a smooth entry into the market.
2. **Build Relationships**: Establishing personal relationships is vital in Chilean business culture. Invest time in networking and building trust with local partners, distributors, and potential clients.
3. **Spanish Language**: While some Chileans speak English, knowing Spanish can enhance communication and demonstrate commitment to the local market. Consider hiring bilingual staff or using translation services.
4. **Market Research**: Conduct thorough market research to understand consumer preferences, competition, and pricing strategies. Tailor the products or services to meet the specific needs of the Chilean market.
5. **Distribution Channels**: Identify effective distribution channels. Work with experienced local distributors who understand the market dynamics and can navigate the distribution network efficiently.
6. **Comprehensive Marketing:** Develop a comprehensive marketing strategy that considers local cultural nuances. Utilize digital marketing, social media, and traditional advertising to reach target audience effectively.
7. **Payment Terms:** Be flexible with payment terms to accommodate local business practices. Understand the prevalent payment methods and offer options that align with Chilean expectations.
8. **Quality and Compliance:** Ensure the products meet Chilean quality standards and regulations. Obtain necessary certifications and communicate the quality of goods or services clearly to build trust.

Section III: Import Food Standards and Regulations and Import Procedures

The Chilean National Customs Service (*Servicio Nacional de Aduanas* – SNA) has overall responsibility for the administration of import procedures and the collection of all import duties. The Customs Service controls documentation and carries out physical inspections during customs clearance. All imported food products are also regulated by the Ministry of Health (MINSAL) and the Ministry of Agriculture's Agricultural and Livestock Service (*Servicio Agricola y Ganadero* – SAG). Custom's clearance in Chile can be quite expeditious if there are no problems with documentation. Potential exporters should note that Chile requires the use of a registered customs agent for all commercial imports valued over $3,000.

Specific import certificate requirements can be found in the FAIRS Export Certificate report. All imported products must be labeled in Spanish, including nutritional labeling. More information on food product labeling can be found in the FAIRS Country report.

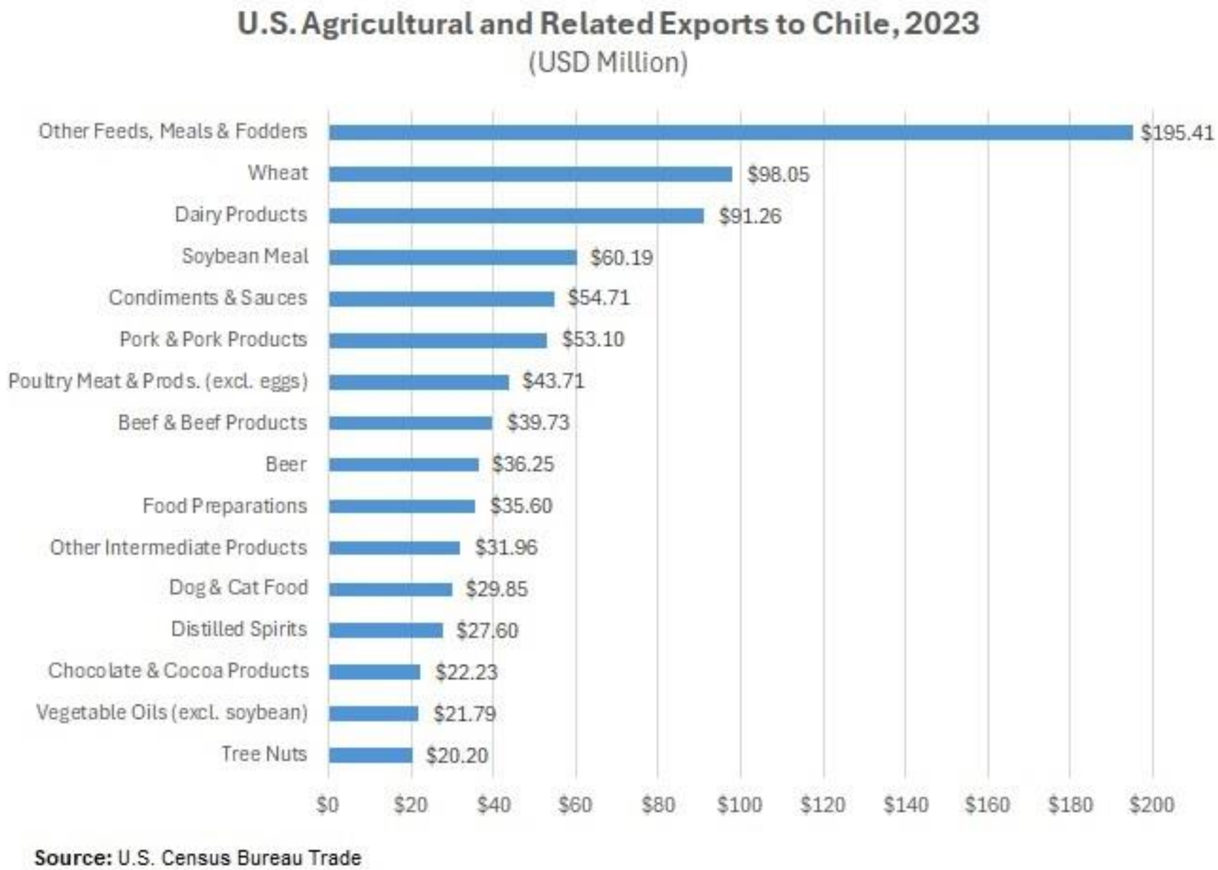
Chile is a member of the World Trade Organization (WTO) and an associate member of the Southern Common Market (MERCOSUR). Patents, trademarks, industrial designs, models, and copyrights are protected in Chile by the provisions of the International Convention for the Protection of Industrial Property (the Paris Convention). For more information, see the FAIRS Country report.

Section IV: Market Sector Structure and Trends

Market Developments

In 2023, U.S agricultural and related exports to Chile reached $1 billion, which represents a five percent decrease from 2022. Chile is the second top market for U.S. agricultural and related products to Chile, after Colombia. Chile is also the second largest market in South America for U.S. consumer-oriented agricultural products with $539 million of exports in 2023, comprising over 60 percent of all agricultural exports. Feeds, wheat, dairy products, soybean meal, condiments and sauces, and pork products dominate U.S. shipments to Chile. Competition from MERCOSUR and regional suppliers remains fierce for consumer-oriented products, grains, soybean products, and pet food.

Figure 1: Top U.S. Agricultural and Ag Related Exports to Chile in 2023



In recent years, Chilean imports of beer, cheese, milk powder, and corn gluten meal from the U.S. have steadily increased. Beef shipments, which had also trended upward in recent years, dropped off in 2023 due to inflationary pressure and competition from regional suppliers. Conversely, in 2023, U.S. soybean meal exports to Chile increased by 112 percent due to competitive prices.

As with the broader trends in bilateral trade, consumer-oriented product exports from the United States increased in recent years. From 2022 to 2023 U.S.-origin consumer-oriented product shipments decreased 22 percent, reaching $539 million in 2023. Beer, beef, poultry, and distilled spirits explain most of this drop in value. As of April 2024, U.S. year-to-date consumer-oriented exports were up 10 percent as compared to the same period in 2023.

Best Prospects

Best prospects for U.S. exporters closely align with broader trade trends (see Table 2). Many Chilean consumers consider U.S. beer, cheese, distilled spirits, and beef to be high quality and within their purchasing power. In February 2022, the Chilean Ministry of Agriculture granted full equivalency to U.S. beer, removing testing requirements. Additionally, the popularity of U.S. distilled spirits has also grown, comprising 42.4 percent of U.S. alcoholic beverage sales to Chile.

U.S. cheese exports to Chile increased by 67 percent, from $33 million in 2015 to $55.2 million in 2023, making the U.S. the second-largest supplier with a 19.2 percent market share, behind only to Argentina. In Chile, people commonly serve a wide variety of cheeses, often paired with wine. Foodservice uses U.S. cream cheese in sushi rolls. Chilean consumers welcome new cheese varieties from around the world with a preference for hard cheeses.

U.S. pork cuts remain competitive against regional suppliers. Products like bacon and breakfast sausage present opportunities to expand sales beyond commodity pork. In 2023, the U.S. exported $39 million in beef, $41 million in poultry, and $48 million in pork. U.S. beans and lentils also compete well in the Chilean market, though Canadian and regional producers present significant competition.

Chilean consumers show strong loyalty to certain U.S. brands, as demonstrated by the steady demand for U.S. confectionery, sauces, and condiments. These categories include candies, chocolates, syrups, mayonnaise, mustard, ketchup, and barbecue sauces. U.S. exports of condiments and sauces nearly doubled from $30 million in 2015 to $55 million in 2023, with mayonnaise accounting for about half of this value.

Table 2: Best Prospects Products in Chile

Dairy Products (cheeses)	Pork and products (bacon and sausages)
Beer	High quality beef
Condiments & sauces (BBQ, ketchup, etc.)	Food preparations
Poultry and products	Dog & cat food
Tree nuts	Beans and lentils
Candy and confections	Distilled spirits

Retail, HRI, and Food Processing

The Chilean retail sector is composed of over 1,352 supermarkets, mid-sized grocery stores, convenience stores, gas station markets, and small independent neighborhood stores. Around 38.52 percent of all retail transactions take place in the Santiago Metropolitan Region. Retail food sales reached $28.9 billion in 2023, a two percent decrease over 2022. Supermarket food sales totaled $15.5 billion and represented 46.36 percent of total grocery retail sales in 2023. A few large retail supermarket chains dominate the Chilean market. These supermarket chains buy from local distributors and through direct import; both channels are potentially accessible to U.S. suppliers. Open markets (wet markets) still exist, but are primarily outlets for fruit and vegetables, or seafood. Chilean consumers lean heavily on online shopping, both direct from traditional retailers and via third party platforms. Chile's largest supermarkets Walmart, Cencosud, Tottus and Unimarc, represent 53 percent of retail revenues. For detailed information, please see FAS Santiago's GAIN Retail Food report.

Chile has a thriving hotel, restaurant, and institutional (HRI) sector. While much of the HRI sector caters to domestic consumers, there is also a well-developed tourism industry. Prior to the COVID-19 pandemic, Chile was known as an important destination for adventure tourism. Chile has both domestic and international hotels and restaurants, many of which offer a wide variety of imported food products. In 2023, Chile's tourism sector contributed $13 billion in income to the economy, a growth of 30.2 percent from the previous year. In 2024, Post expects the HRI sector to continue expanding in line with the growth in tourism and food service consumption. For detailed information, please see FAS Santiago's GAIN Hotel, Restaurant and Institutional Food Service report.

Chile has a developed food processing industry that represents 15.4 percent of Chilean exports, at $14.5 billion in 2023. Chilean food processors sell their products domestically or internationally and import about half of food ingredients. Some large international companies use their production plants in Chile to serve other markets in Latin America. Chilean consumers have an increasing concern for health-related issues, and the food processing industry continues to adapt to shifting demand. There continues to be opportunities for U.S. ingredients in Chile, specifically additives, preservatives, thickeners, and sweeteners. For detailed information, please see the FAS Santiago's GAIN Food Processing and Ingredients report.

Table 3: Overall Competitive Situation of Consumer-Oriented Products in Chile

Ranking	Product Category/Total Chilean Import	Largest Suppliers	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
1	**Beef and Products** Total imports: $1.4 billion From the U.S.: $51 million	1. Paraguay – 45% 2. Brazil – 34% 3. Argentina – 10% 4. Uruguay – 3.83% **5. U.S. – 3.54%**	(1 and 2) Proximity and availability. Paraguay and Brazil sell lower quality and price competitive beef.	Chilean beef production is insufficient to meet domestic demand.
2	**Dairy Products** Total imports: $547 million From the U.S.: $93 million	1. Argentina – 21% **2. U.S. – 17%** 3. Germany – 10% 4. Netherlands – 9%	Argentina benefits from low costs and proximity.	Chile has a limited production of dairy products, especially cheeses.
3	**Processed Vegetables** Total imports: $358 million From the U.S.: $16 million	1. Belgium – 35% 2. Netherlands – 14% 3. Argentina – 9.86% 4. China – 9.58% 5. Spain – 6% 6. Peru –5.82% 7. Germany – 5.31% **8. U.S. – 4.72%**	Belgium and Netherlands mainly supply frozen French fries and mix vegetables. Argentina supplies mix vegetables, and China primarily supplies preserved mushrooms and sweet corn.	Chilean production is insufficient to meet domestic demand.
4	**Bakery Goods, Cereals, & Pasta** Total imports: $315 million From the U.S.: $17 million	1. Argentina – 18% 2. Peru – 16% 3. Spain – 9% **4. U.S. – 5.56%** 5. Mexico – 5.45%	Argentina and Peru supplies pasta and pastries. Both countries benefit from low costs and proximity.	Chilean production is insufficient to meet domestic demand.
5	**Pork and Products** Total imports: $304 million From the U.S.: $53 million	1. Brazil – 70% **2. U.S. – 17%** 3. Spain – 8% 4. Germany – 1%	Brazilian and U.S. pork compete in Chile based on price.	Chile produces and consumes pork, but also exports based on price.

6	**Dog & Cat Food** Total imports: $242 million From the U.S.: $28 million	1. Argentina – 39% 2. Brazil – 13% **3. U.S. – 12%** 4. Spain - 9% 4. Czech Republic – 8%	(1 and 3) Proximity and availability. Argentina and Brazil sell price competitive dog and cat food.	Chile has limited variety of domestic dog and cat food.
7	**Soup & Other Food Preparations** Total imports: $232 million From the U.S.: $56 million	**1. U.S. – 24%** 2. Brazil – 10% 3. Spain – 6% 4. Netherlands – 5%	The U.S. is the main supplier of food preparations and non-alcoholic beverages.	Chilean production is insufficient to meet domestic demand.
8	**Poultry and Products** Total imports: $226 million From the U.S.: $38 million	1. Brazil – 77% **2. U.S. – 17%** 3. Argentina – 5% 4. Uruguay – 1%	(1 and 3) Proximity and availability. Brazil sells price competitive poultry.	Chicken is the most consumed meat in Chile.
Source: U.S. Census Bureau Trade Data				

Section V: Agricultural and Food Imports

Table 4: Total U.S. Exports of Agricultural and Ag Related Products to Chile, 2019-2023 (USD)

U.S. Agricultural and Ag Related Export to Chile Calendar Year: 2019 - 2023						
	Calendar Year (Value: USD)					
Product	2019	2020	2021	2022	2023	Period/Period % Change (Value)
Agricultural & Related Products	$1,029,340	$985,621	$1,231,222	$1,105,557	$1,053,379	-5
Consumer Oriented Total	$694,379	$643,334	$821,389	$669,058	$538,521	-20
Intermediate Total	$211,918	$190,614	$285,668	$302,393	$376,105	24
Bulk Total	$93,350	$128,361	$99,981	$110,008	$109,971	--
Agricultural Related Products	$29,693	$23,312	$24,184	$24,098	$28,782	19
Grand Total	$1,029,340	$985,621	$1,231,222	$1,105,557	$1,053,379	-5
Source: U.S. Census Bureau Trade Data						

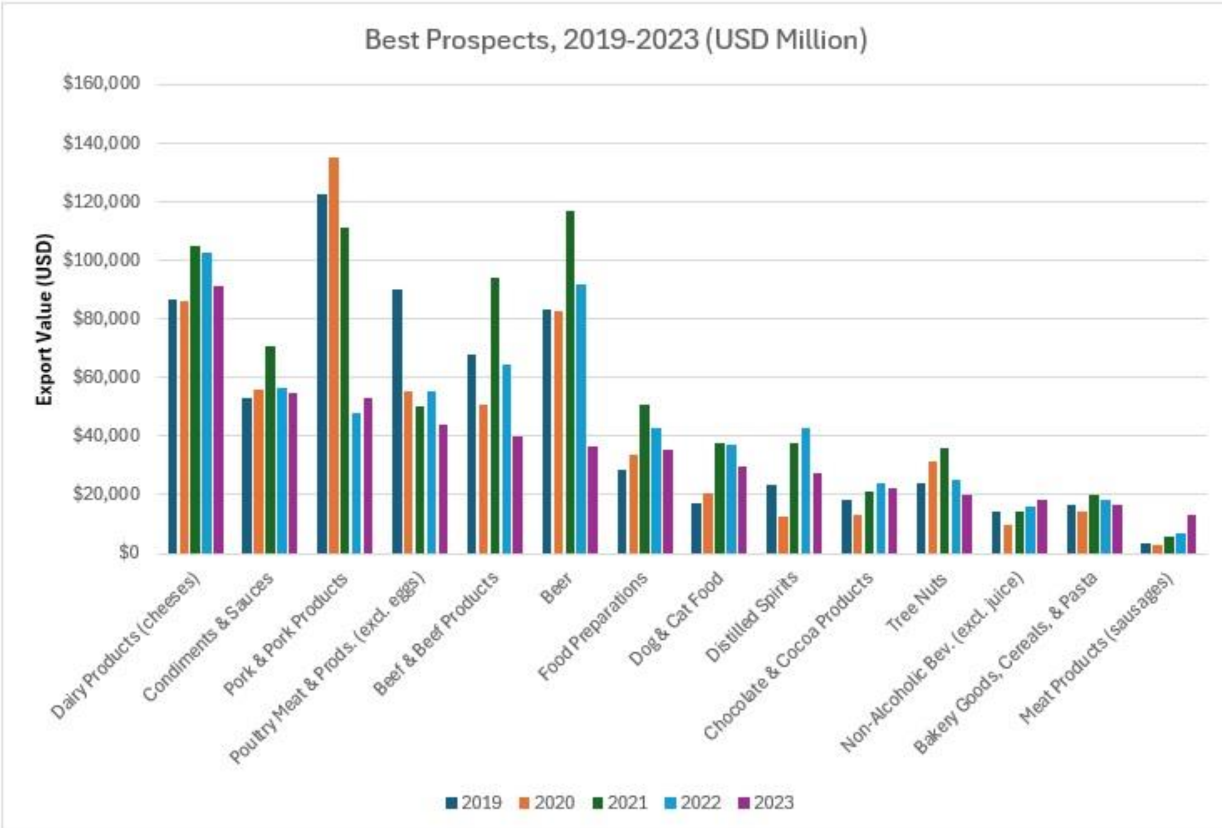
Table 5: Top U.S. Agricultural Exports to Chile, by Category

Product	Export Value 2023 (USD Mil.)	Average Growth 2019-2023 (%)	Absolute Change 2019 - 2023 (USD Mil.)
Other Feeds, Meals & Fodders	$195,411	21.31%	$86,558
Wheat	$98,049	35.07%	$17,620
Dairy Products	91,260	1.92%	$4,339
Soybean Meal	$60,185	2508.13%	$60,100
Condiments & Sauces	$54,707	2.05%	$1,384
Pork & Pork Products	$53,099	-13.28%	-$69,438
Poultry Meat & Prods. (excl. eggs)	$43,710	-14.75%	-$46,677
Beef & Beef Products	$39,726	-2.30%	-$28,023
Beer	$36,252	-10.33%	-$47,047
Food Preparations	$35,595	21.19%	$7,237
Other Intermediate Products	$31,963	194.57%	$4,513
Dog & Cat Food	$29,845	20.83%	$12,841
Distilled Spirits	$27,596	31.95%	$4,330
Chocolate & Cocoa Products	$22,230	10.12%	$4,199
Vegetable Oils (excl. soybean)	$21,786	75.41%	$19,013
Tree Nuts	$20,202	-1.04%	-$3,772
Seafood Products	$19,997	12.98%	$6,308
Non-Alcoholic Bev. (excl. juice)	$18,000	9.85%	$3,615
Essential Oils	$17,959	19.19%	$7,309
Bakery Goods, Cereals, & Pasta	$16,822	2.27%	$169
Source: U.S. Census Bureau Trade Data			

Table 6: Best Prospects in Chile

	Export Values (USD Millions)					Average Growth
Product	2019	2020	2021	2022	2023	2019-2023
Dairy Products	$86,921	$86,156	$105,074	$102,685	$91,260	1.92%
Condiments & Sauces	$53,323	$55,657	$70,820	$56,639	$54,707	2.05%
Pork & Pork Products	$122,537	$135,293	$111,385	$47,702	$53,099	-13.28%
Poultry Meat & Prods. (excl. eggs)	$90,387	$55,448	$50,308	$55,194	$43,710	-14.75%
Beef & Beef Products	$67,749	$50,568	$94,059	$64,274	$39,726	-2.30%
Beer	$83,299	$82,433	$116,779	$91,664	$36,252	-10.33%
Food Preparations	$28,358	$33,584	$50,744	$42,690	$35,595	9.26%
Dog & Cat Food	$17,004	$20,607	$37,889	$36,896	$29,845	20.83%
Distilled Spirits	$23,266	$12,821	$37,767	$43,065	$27,596	31.95%
Chocolate & Cocoa Products	$18,031	$13,042	$21,066	$24,082	$22,230	10.12%
Tree Nuts	$23,974	$31,447	$35,909	$24,881	$20,202	-1.04%
Non-Alcoholic Bev. (excl. juice)	$14,385	$9,605	$14,029	$16,185	$18,000	9.85%
Bakery Goods, Cereals, & Pasta	$16,653	$14,255	$19,890	$18,008	$16,822	2.27%
Meat Products (sausages)	$3,592	$2,636	$5,939	$7,127	$13,131	50.73%
Source: U.S. Census Bureau Trade Data						

Figure 2: Export Value Growth in Best Prospects Categories, 2018-2022 (USD Million)



Section VI: 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, +56 2 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/
National Customs Agency Plaza Sotomayor 60 – Valparaíso Tel.: +56 2 600-570-7040 www.aduana.cl	Instituto Nacional de Normalización (INN) Chilean Standards Matías Cousiño 64, piso 6, Santiago Tel.: +56 2 2445-8800 info@inn.cl www.inn.cl/
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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

Attachments:

No Attachments