



**Euromonitor
International**

Staple Foods in Chile

October 2024

Table of Contents

Staple Foods in Chile

EXECUTIVE SUMMARY

- Staple foods in 2024: The big picture
- Key trends in 2024
- Competitive landscape
- Channel developments
- What next for staple foods?

MARKET DATA

- Table 1 - Sales of Staple Foods by Category: Volume 2019-2024
- Table 2 - Sales of Staple Foods by Category: Value 2019-2024
- Table 3 - Sales of Staple Foods by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Staple Foods by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Staple Foods: % Value 2020-2024
- Table 6 - LBN Brand Shares of Staple Foods: % Value 2021-2024
- Table 7 - Penetration of Private Label by Category: % Value 2019-2024
- Table 8 - Distribution of Staple Foods by Format: % Value 2019-2024
- Table 9 - Forecast Sales of Staple Foods by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Staple Foods by Category: Value 2024-2029
- Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

Baked Goods in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Local political and economic factors affect bread prices
- Shift towards premium products by bakeries and pastry shops
- Bimbo expands its production capacity and invests in healthier choices

PROSPECTS AND OPPORTUNITIES

- Chileans will continue to favour artisanal bread due to higher quality and greater affordability
- Rising demand for unique baked goods experiences
- Baked goods market will undergo further modernisation, with Grupo Bimbo leading the way

CATEGORY DATA

- Table 13 - Sales of Baked Goods by Category: Volume 2019-2024
- Table 14 - Sales of Baked Goods by Category: Value 2019-2024
- Table 15 - Sales of Baked Goods by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Baked Goods by Category: % Value Growth 2019-2024
- Table 17 - Sales of Pastries by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Baked Goods: % Value 2020-2024
- Table 19 - LBN Brand Shares of Baked Goods: % Value 2021-2024
- Table 20 - Distribution of Baked Goods by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Baked Goods by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Baked Goods by Category: Value 2024-2029
- Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2024-2029

Breakfast Cereals in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growing awareness of ingredients in children breakfast cereals
- Nestlé Chile SA leads in breakfast cereals through combination of innovation and promotion
- Continued growth of private label products

PROSPECTS AND OPPORTUNITIES

- Future inflation trends will have impact on market for breakfast cereals
- Rising demand for health-oriented products will drive product innovation in breakfast cereals
- Growing importance of sustainability in manufacturing process

CATEGORY DATA

- Table 25 - Sales of Breakfast Cereals by Category: Volume 2019-2024
- Table 26 - Sales of Breakfast Cereals by Category: Value 2019-2024
- Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2019-2024
- Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2019-2024
- Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2020-2024
- Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2021-2024
- Table 31 - Distribution of Breakfast Cereals by Format: % Value 2019-2024
- Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2024-2029
- Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2024-2029
- Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2024-2029
- Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2024-2029

Processed Fruit and Vegetables in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Shelf-stable favourites face challenge of rising prices
- Two players vie for dominance in processed fruit and vegetables
- Private labels gain strength by continuously expanding their product portfolios

PROSPECTS AND OPPORTUNITIES

- Evolving eating habits will impact demand for processed fruit and vegetables
- Navigating the challenges posed by climate change will be essential for key players
- Foodservice will grow, alongside stabilisation of prices

CATEGORY DATA

- Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024
- Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2019-2024
- Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024
- Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024
- Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024
- Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024
- Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024
- Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024
- Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029
- Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

Processed Meat, Seafood and Alternatives To Meat in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Inflation impacts performance of red meat in Chile
- Retail demand for meat and seafood substitutes continues to grow, with greater emphasis on transparency
- Emphasis on technological innovation and personalised customer experiences

PROSPECTS AND OPPORTUNITIES

- Health, wellness and sustainability trends will drive dynamic performance of meat and seafood substitutes over the forecast period
- Growing focus on sustainable packaging
- Further investment for Productos Fernandez SA

CATEGORY DATA

- Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024
- Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024
- Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024
- Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024
- Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024
- Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024
- Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024
- Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2024
- Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2019-2024
- Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029
- Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2024-2029

Rice, Pasta and Noodles in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Export restrictions drive rice shortages in Chile
- Growing demand for healthier pasta varieties
- Carozzi SA promotes healthy lifestyles through community engagement

PROSPECTS AND OPPORTUNITIES

- Innovation and adaptation will be key in expanding rice production
- Pasta will continue to be preferred choice, due to its convenience and widespread availability
- Empresas Carozzi SA will strengthen its leadership

CATEGORY DATA

- Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024
- Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2019-2024
- Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024
- Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024
- Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024
- Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024

Table 69 - NBO Company Shares of Rice: % Value 2020-2024

Table 70 - LBN Brand Shares of Rice: % Value 2021-2024

Table 71 - NBO Company Shares of Pasta: % Value 2020-2024

Table 72 - LBN Brand Shares of Pasta: % Value 2021-2024

Table 73 - NBO Company Shares of Noodles: % Value 2020-2024

Table 74 - LBN Brand Shares of Noodles: % Value 2021-2024

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024

Table 76 - Distribution of Rice by Format: % Value 2019-2024

Table 77 - Distribution of Pasta by Format: % Value 2019-2024

Table 78 - Distribution of Noodles by Format: % Value 2019-2024

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2024-2029

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-in-chile/report.