

# Staple Foods in Chile

November 2023

Table of Contents

## Staple Foods in Chile

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baked Goods in Chile

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Impact of war in Ukraine on bread supplies in Chile

Baked goods in Chile mainly driven by artisanal producers

Grupo Bimbo creates new factory in the Ñuble region

### PROSPECTS AND OPPORTUNITIES

Chileans will continue to favour artisanal bread due to higher quality and greater affordability

Cakes will continue to recover from impact of pandemic in line with more frequent social gatherings

Launch of innovative products by new bakeries set to drive bread sales in Chile

### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023

Table 14 - Sales of Baked Goods by Category: Value 2018-2023

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 - Sales of Pastries by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 19 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

## Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

### Breakfast Cereals in Chile

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation and fewer at-home consumption occasions impact demand for breakfast cereals in Chile

Nestlé retains leadership of consolidated competitive landscape

Empresas Carozzi's multi-brand success and private label's resilience

#### PROSPECTS AND OPPORTUNITIES

Children's breakfast cereals to continue focusing on healthier options to address parents' concerns

Growth of muesli and granola will be driven by positive perceptions as a healthy option

Elevated inflation could support demand for more affordable private label options

#### CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

### Processed Fruit and Vegetables in Chile

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Chile's per capita consumption of frozen processed vegetables significantly surpasses that of other countries in the region

Agricola Frutos del Maipo set to gain leadership of processed fruit and vegetables in Chile

Inflation and higher costs impact retail performance of shelf stable beans

#### PROSPECTS AND OPPORTUNITIES

Convenience of frozen processed options will still play an important role in an inflationary landscape

As high inflation persists, private label is set to remain an attractive alternative for price-sensitive consumers

Foodservice demand set to fully recover over the forecast period

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

## Processed Meat, Seafood and Alternatives To Meat in Chile

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation influences performance of processed meat and seafood in Chile

Retail demand for meat and seafood substitutes continues to grow, driven by health and ethical reasons

Productos Fernandez SA retains leadership of consolidated competitive landscape

#### PROSPECTS AND OPPORTUNITIES

Health and wellness trend to further drive dynamic performance of meat and seafood substitutes over the forecast period

Further growth of meat and seafood substitutes will fuel innovation efforts

High inflation in Chile is set to further impact retail demand for processed meat

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 52 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 53 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 54 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 55 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 56 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 57 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 58 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 59 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Rice, Pasta and Noodles in Chile

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Retail volumes of rice significantly affected by ongoing impact of inflation in Chile

How Vietnam and Thailand's coordination impacts Chile's price levels

Empresas Tucapel SA retains leadership of rice, supported by wide portfolio

#### PROSPECTS AND OPPORTUNITIES

As inflation continues to impact consumers, pasta remains a popular choice for Chileans

Tradition supports Empresas Carozzi's leadership of pasta in Chile

High price of chilled pasta will continue to hinder its penetration in Chile

#### CATEGORY DATA

Table 61 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 62 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 63 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 65 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

Table 66 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 67 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023

Table 68 - NBO Company Shares of Rice: % Value 2019-2023

Table 69 - LBN Brand Shares of Rice: % Value 2020-2023

Table 70 - NBO Company Shares of Pasta: % Value 2019-2023

Table 71 - LBN Brand Shares of Pasta: % Value 2020-2023

Table 72 - NBO Company Shares of Noodles: % Value 2019-2023

Table 73 - LBN Brand Shares of Noodles: % Value 2020-2023

Table 74 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023

Table 75 - Distribution of Rice by Format: % Value 2018-2023

Table 76 - Distribution of Pasta by Format: % Value 2018-2023

Table 77 - Distribution of Noodles by Format: % Value 2018-2023

Table 78 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

## 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](https://www.euromonitor.com/staple-foods-in-chile/report).