



Staple Foods in Chile

November 2025

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Staple Foods in Chile

EXECUTIVE SUMMARY

Inflation and uncertainty encourage search for value

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Responding to challenges posed during previous year

Ongoing uncertainty affecting consumer behaviour

WHAT'S NEXT?

Rise in health consciousness and environmental awareness

Persistent interest in private label products

Health and wellness and sustainability influencing demand across categories

COMPETITIVE LANDSCAPE

Strong demand for artisanal bread

Tucapel expanding strongly

CHANNELS

Supermarkets is the leading channel for staple foods

Neighbourhood bakeries remain important

Performance of traditional channels varies across categories

Ongoing expansion of e-commerce

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Baked Goods in Chile

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INDUSTRY PERFORMANCE

Cost-push pressures slow down Chile's baked goods sector

Growing interest in unpackaged pastries

WHAT'S NEXT?

Supermarket convenience and innovation shape the future of baked goods

Wellness and tradition drive transformation

Bakeries embrace technology and transparency to drive sustainable growth

COMPETITIVE LANDSCAPE

Sourdough and wholegrain trends reinforce artisanal bread's dominance

Empresas Carozzi committed to enhancing production processes

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[Breakfast Cereals in Chile](#)

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Price concerns support budget products

INDUSTRY PERFORMANCE

Breakfast cereals face another year of slowdown

Flakes sees growth driven by products aligning with health trends

WHAT'S NEXT?

Health trends drive moderate growth in Chile's breakfast cereals

Natural, organic, and specialised cereals meet consumer demand

Agro-Conexión Expo fosters collaboration between farmers and suppliers

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Declining volume sales

Growth in shelf stable vegetables

WHAT'S NEXT?

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Frozen fruit becomes a key trend for younger consumers

Frutos del Maipo focusing on eco-friendly practices and responsible consumption

COMPETITIVE LANDSCAPE

Alimentos y Frutos retains lead

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INDUSTRY PERFORMANCE

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Growing interest in meat and seafood substitutes

WHAT'S NEXT?

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Meat and seafood substitutes positioned for growth as consumers seek nutrition

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COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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Wholegrain pastas gain traction

Chilean rice market focuses on premium, organic, and low-impact varieties

COMPETITIVE LANDSCAPE

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Empresas Tucapel leads growth

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