



**Euromonitor  
International**

# Processed Meat, Seafood and Alternatives To Meat in Chile

November 2025

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Affordable products appeal to price-conscious consumers

### INDUSTRY PERFORMANCE

Consumer caution shapes processed meat, seafood and alternatives to meat amid slowdown

Growing interest in meat and seafood substitutes

### WHAT'S NEXT?

Processed meat and seafood set for moderate growth, while plant-based products expand strongly

Meat and seafood substitutes positioned for growth as consumers seek nutrition

From energy to water stewardship processed meat reinvents its future

### COMPETITIVE LANDSCAPE

Strategic leadership transition supports PFalimentos' market dominance

Minuto Verde sees strong growth

### CHANNELS

Convenience and variety support supermarkets' lead

Further expansion of e-commerce

### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

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## Staple Foods in Chile - Industry Overview

### 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

## MARKET DATA

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Table 19 - NBO Company Shares of Staple Foods: % Value 2021-2025

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Table 23 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 24 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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