

# Sector Reports

## Agriculture

Doing Business in Chile Guide 2025





## Chile: A Global Leader in High-Value Agriculture

Chile is a top global producer and exporter of high-value crops. Its Southern Hemisphere location and diverse climate zones allow year-round production of fresh produce, when few other regions can.

Geography plays a vital role. The Andes, Pacific Ocean, Atacama Desert, and Patagonia create natural barriers, protecting agriculture from foreign pests. This, combined with strict controls, enables Chile to grow a wide variety of crops safely.





Over the past 50 years, Chile has shifted from traditional farming to intensive fruit and vegetable production. Agribusiness (agriculture, livestock, forestry, etc.) is a major industry with strong growth prospects.

In 2023, fruit-growing accounted for 37% of agribusiness value. Agriculture made up 3.4% of GDP, 7.5% of total exports (6.8% being fruit), and 16.8% of non-mining exports (15% being fruit). Combined with food and beverage processing, the sector contributed 14.5% to exports.

Production agriculture alone employed 630,000 people in 2023—7% of national employment.

Chile lags in cereal and beef production due to soil and climate limitations and relies on imports of wheat, maize, and beef.

However, Chile is attractive to firms seeking high-quality produce or offering agtech solutions. Competitiveness is driven by natural advantages, modern production technologies, and extensive trade agreements.

In 2024, the agricultural sector accounted for approximately 8.2% of Chile's GDP. Agricultural and related exports represented 25.3% of total exports, with fruit exports making up a significant share (USD 9.46 billion FOB in the 2024/25 season). By mid-2025, fresh fruit exports had already reached USD 6.04 billion, reflecting a 3.3% year-on-year increase. The food and beverage processing industry contributed 24.15% of total exports and accounted for around 4.7% of GDP.

### Exports and Global Position

Chile is the world's largest exporter of cherries and table grapes, and a top 5 exporter of apples, walnuts, and almonds. Wine and processed fruits follow closely. It leads in exports of blueberries, apples, dehydrated plums, salmon, mussels, and more.

Trade liberalisation has shaped Chile's export success. With 34 trade agreements covering 65 countries—88% of global GDP—Chile has more deals than any other nation and was the first South American member of the OECD.

### Aquaculture and Agtech Growth

Chile's climate and ocean conditions have fuelled strong aquaculture growth—1.3 billion tonnes in 2019, up 5.7% from 2018. Government incentives and technological investment make aquaculture and agtech attractive sectors.

Agtech investment grew 250% in five years. Startups like NotCo, which achieved unicorn status in 2021, lead plant-based innovation. The shift toward sustainable, health-conscious foods has opened new markets (e.g., non-GMO, lactose-free, and plant-based products).



## Sustainability and Organic Practices

Chilean agriculture increasingly adopts soil conservation and organic certification. The Ministry of Agriculture runs the SIRDS-S program to promote soil restoration.

## Industry Structure and Investment

The sector is fragmented, dominated by micro to medium-sized firms. Due to high land and equipment costs entry often occurs through brownfield investments, acquisitions, or partnerships.

Since 2018, foreign interest has grown due to economic activity and demand for Chile's exports.

Some of Chile's biggest agribusiness companies, by revenues, include:

- Celulosa Arauco y Constitución S.A. - Forestry and pulp - \$6.01 billion USD
- Agrosuper S.A. – Pork, poultry and salmon – \$2.5 billion USD (2022)
- Empresas Aquachile – Salmon - \$1.69 billion USD
- Agrícola Super Limitada – Large scale agricultural production - \$1.64 billion USD

## Regulatory Framework

Chile enforces strict sanitary and phytosanitary standards. Key regulations include:

- Sanitary Code & Food Health Regulations
- Decree No. 118/2015 (HACCP)
- Pesticide and residue limits (e.g., Resolution 33)
- Laws 20,606 (food composition) and 18,755 (Agriculture Service)
- DL 3,557 on Agricultural Protection

SAG (Agricultural and Livestock Service) oversees:

- Authorising facilities for livestock, breeding, slaughter, and processing
- Verifying phytosanitary compliance for imports/exports

An online tool by the Ministry of Agriculture provides export/import phytosanitary requirements.



## UK-Chile Trade in Agribusiness

Since 2020, the UK and Chile have cooperated on Export Health Certificates (EHCs) for animal and plant products.

Agreed certificates include:

1. Bovine and ovine semen/embryos
2. Milk and dairy
3. Pork, chilled/frozen meat
4. Pet food and dog chews
5. Equine products (semen, live animals)
6. Processed meat, ready meals, gelatine, collagen
7. Plant-based pet food
8. Blood products, viscera meals, casings

### UK Genetic Exports:

The UK is now the only European country approved to export ovine embryos to Chile. Collaboration with breeders in Patagonia and UKTAG has expanded trade in ovine, bovine, and equine genetics.

### Dairy and Pork:

Six UK dairies are listed on SAG's export register. Twenty-seven UK firms are approved to export pork—entering the Chilean market for the first time.

### Pet Food:

Approval time for UK exporters has dropped to two months. Veterinary/pharma products with EU/US approval see a



reduced five-month process.

### Agribusiness Working Group

Formed during the 2020 UK-Chile Trade Dialogue, this group promotes trade and investment. Its first meeting (September 2021) covered:

- Novel foods
- UK apple exports
- Veterinary and pet food registration
- Export and phytosanitary certification

### References

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