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Report Highlights:

Chile has become a promising market for pet food products. Over the past decade, pet nutrition in Chile transitioned from being a simple extension of the human diet to a sophisticated and specialized industry. Chilean pet owners demand a wide range of products, including dry food, wet food, treats, and specialized diets tailored to the age, breed, and health conditions of pets. Both local and international brands actively compete in this market, leveraging supermarkets, pet stores, e-commerce platforms, and veterinary clinics to reach consumers. Chile's robust regulatory framework ensures strict safety and quality standards, further enhancing consumer trust and driving market expansion.

1. MARKET OVERVIEW

The pet food market in Chile has grown significantly over the past decade, driven by increasing pet ownership and a growing trend towards pet humanization. As more Chilean households consider pets, particularly cats and dogs, as integral members of the family, the demand for high-quality and specialized pet food products has surged. This dynamic market demands a diverse range of products, including dry food, wet food, treats, and specialized diets tailored to the unique needs of different pets. Both local and international brands actively compete, using various distribution channels such as supermarkets, pet stores, and online retailers to reach consumers. The regulatory framework in Chile ensures that pet food products meet strict safety and quality standards, enhancing consumer trust and driving market growth.

While cats and dogs dominate the pet landscape in Chile, other animals such as birds, fish, hamsters, and reptiles are less popular due to their perceived lack of interactivity and emotional connection. Consequently, this report focuses on dog and cat food, as these species represent the primary consumers in the pet food market.

As the industry continues to evolve, it presents significant opportunities for innovation and expansion, making it an attractive sector for investors and businesses. The combination of cultural factors, consumer preferences, and a robust regulatory environment positions Chile as a promising market for pet food products.

Historical Context and Evolution of the Market

Four decades ago, pet food in Chile, as in many other parts of the world, was far less specialized. The concept of "balanced nutrition" for dogs and cats was neither widely understood nor accessible to most of the population. The most common practice involved feeding pets leftover food from family meals, such as rice, pasta, meat, or bones. Awareness of the toxicity of certain foods (e.g., chocolate, onions, garlic) was minimal, potentially exposing pets to health risks. Some households prepared specific meals, typically consisting of rice or bread mixed with broth or ground meat, but these homemade recipes lacked scientific nutritional formulation. Knowledge of specific nutritional needs was limited, and diets were rarely differentiated by life stage (puppy, adult, or senior), breed, or size; the primary concern was ensuring the pet was "full" rather than addressing overall health.

The introduction of dry pet food, commonly known as kibble, was a gradual process in Chile, gaining traction in the 1980s and becoming more mainstream in the 1990s. International brands like *Purina*, with its iconic "*Dog Chow*," were among the pioneers in introducing dry, balanced pet food to the market. Initially, kibble was perceived as a niche or "premium" product, primarily consumed by higher-income households or pet owners who prioritized their animal's well-being.

The growth of the kibble market coincided with increased efforts by veterinarians and pet food companies to educate owners about the importance of a complete and balanced diet. Information campaigns highlighted the benefits of dry food, such as improved dental health, better coat condition, and enhanced digestion, compared to the nutritional gaps of homemade diets.

Over the years, the Chilean pet food industry has undergone a significant transformation. What began as a limited selection of products has expanded into a diverse array of options, including kibble tailored to specific needs, such as formulas for puppies, adults, large breeds, small breeds, sterilized cats, and "super-premium" or specialized diets designed to address various health conditions. With pets living longer due to better care and nutrition, there is an increasing demand for pet food products that cater to the needs of senior pets, including specialized diets for joint health, weight management, and other age-related conditions. The demand for specialized diets also is on the rise, with pet owners seeking products that address specific health concerns such as allergies, digestive problems, and weight management. Grain-free, organic, and natural pet food products are also gaining popularity.

In 2025, the dog food segment is expected to see notable growth in both volume and value, driven by rising disposable incomes and increased demand for premium, natural products that cater to pets' specific dietary needs. Dry dog food remains the dominant category due to its cost-effectiveness, convenience, and improved nutritional formulations. Meanwhile, the wet cat food and cat treats segments are gaining traction, reflecting the desire of pet owners to bond with their cats and provide them with additional enrichment and stimulation. Cat treats offer a rewarding way to reinforce positive behavior, such as training, grooming or simply spending quality time together.

Table 1: Opportunities and Challenges Facing U.S. Exporters

Opportunities	**Challenges**
Specialized Diets - there is a growing demand for specialized pet food products that cater to specific health needs, such as hypoallergenic diets, weight management, and senior pet nutrition. U.S. companies that can develop and market these products effectively have the opportunity to capture a niche market segment.	**Inflation and Currency Fluctuations** – economic instability, including inflation and fluctuations in the Chilean peso, can impact the cost of imported products.
Organic and Natural Products - the trend towards natural and organic pet food products presents an opportunity for growth. Chilean consumers are increasingly seeking products made from high-quality, ethically sourced ingredients, free from artificial additives and preservatives.	**Consumer Spending Power –** economic downturns can lead to reduced consumer spending power, making it challenging for premium pet food brands to maintain sales. Budget-conscious consumers may opt for more affordable options, impacting the market share of higher-priced products.
Innovative Formulations -creation of innovative pet food formulations that address emerging consumer preferences and pet health needs. This includes grain-free, high-protein, and functional pet food products.	**Logistics and Distribution –** efficient logistics and distribution are critical for ensuring the timely availability of pet food products. Challenges such as transportation delays, inadequate infrastructure, and disruptions in the supply chain can affect product availability and lead to stockouts.

Online Sales Growth - the rise in e-commerce presents a significant opportunity for pet food companies to expand their reach. Investing in robust online platforms, offering subscription services, and leveraging digital marketing can drive sales and enhance customer loyalty.	
Regional Markets - expanding into underserved regions within Chile can help companies tap into new customer bases. This includes targeting rural areas and smaller cities where pet ownership is growing but access to a wide range of pet food products may be limited.	

Market Size and Growth

In Chile, there are approximately 12.5 million domestic dogs and cats, according to a 2022 study conducted by the *Faculty of Veterinary Medicine* at *Chilean Catholic University*. This figure highlights a lasting trend; pets have become integral members of the family. The market has responded to this shift by adapting its offerings in recent years. Today, retail stores and even pharmacies provide a wide range of products that were unimaginable just a few years ago. The availability of items such as dog and cat sweaters, bandanas, shoes, and a variety of flavored pet foods has expanded both in physical stores and online, with demand for these products currently experiencing substantial growth.

The monthly cost of owning a pet, including expenses of food, grooming, and healthcare generally ranges from $52 to $73 for smaller animals, and can exceed $104 for larger pets.

In 2024, the pet category was among the fastest-growing segments in Chilean retail sector. Retailers responded to this strong demand by broadening their product portfolios and allocating more shelf space to pet food products in both supermarkets and digital channels. The pet categories driving the highest sales included dry food, wet food, and pet snacks, which remain essential staples for pet owners. Additionally, non-food items such as antiparasitic medications and litter boxes represented a substantial portion of household spending, underscoring the diverse and evolving needs of Chilean pet owners.

The pet food market continued its solid expansion in 2024, driven by strong performances across both cat and dog food segments. Cat food retail value sales grew by 8 percent in current terms to reach $544.6 million, supported primarily by the dry food segment, which was the best performing category with an 8.9 percent increase to $424.6 million. The dog food segment showed an even stronger performance, with retail value sales rising by 9.7 percent in current terms to $794.5 million, while dry dog food led growth, posting a 10.4 percent increase to $679 million. These results reflect sustained demand for staple pet nutrition products and the continued willingness of Chilean consumers to invest in quality food options for their pets.

In 2024, the sales value of the pet food (dog and cat) market in Chile was $1.33 billion. Projections for 2025 estimate this figure will rise to $1.4 billion.

Table 2: Chilean Sales of Dog Food By Category

Sales of Dog Food by Category (Value 2020-2024)					
USD million	**2020**	**2021**	**2022**	**2023**	**2024**
Dog Food	$545.7	$616.8	$684.3	$717.1	$794.5
- Dog Treats (economy, mid-priced and premium)	22.9	27.7	29.9	37.9	41.1
- Dry Dog Food (economy, mid-priced and premium)	464.9	522.9	584.4	607.8	679.1
- Wet Dog Food (economy, mid-priced and premium)	57.8	66.1	69.9	71.3	74.1

Table 3: Chilean Sales of Cat Food by Category

Sales of Cat Food by Category (Value 2020-2024)					
USD million	**2020**	**2021**	**2022**	**2023**	**2024**
Cat Food	$294.1	$365.6	$443.2	$500.1	$544.6
- Cat Treats (economy, mid-priced and premium)	3.4	14.1	15.5	14.9	15.0
- Dry Cat Food (economy, mid-priced and premium)	230.1	274.8	337.1	386.7	424.6
- Wet Cat Food (economy, mid-priced and premium)	60.5	76.6	90.5	98.3	104.8

Consumer Preferences

Chilean consumers are increasingly focused on the health and wellness of their pets. There's a growing demand for pet food made with natural ingredients, beneficial supplements like probiotics and Omega-3 fatty acids, and highly personalized formulas tailored to a pet's specific age, breed, and health conditions. Pet owners are more conscious about the products they buy, and they seek brands that are transparent about their ingredients and production processes. Sustainability in packaging and the use of local ingredients are also important factors.

According to a 2022 study conducted by *Cadem* (*Center for Public Opinion Studies*), 44 percent of Chilean pet owners are willing to increase their spending on pet food, underscoring the importance placed on quality and nutrition. When selecting pet food, 57 percent prioritize quality, 44 percent consider their pet’s preferences, and 33 percent focus on price, highlighting the emphasis on ensuring their pets’ well-being over cost considerations.

Figure 1: Chilean Consumer Preferences for Cat Food

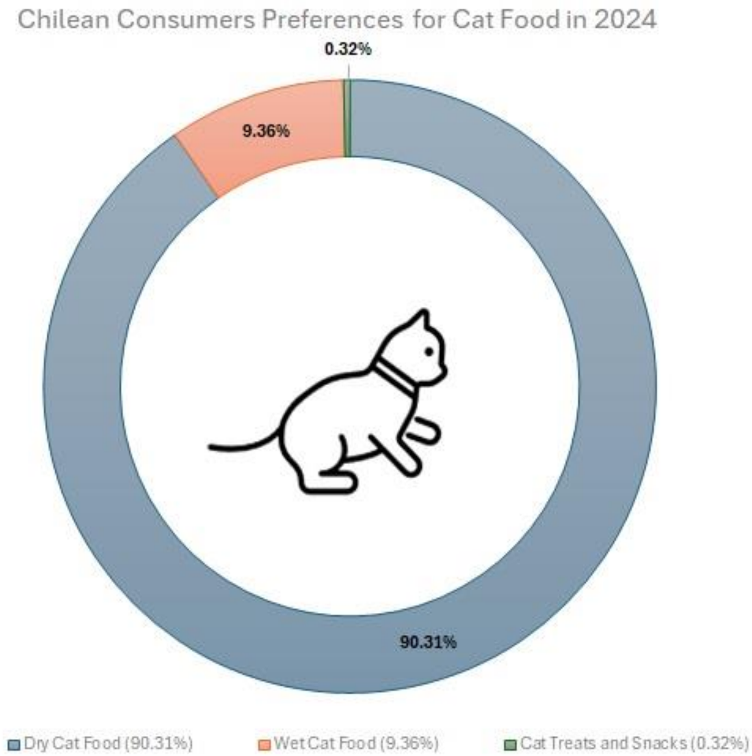
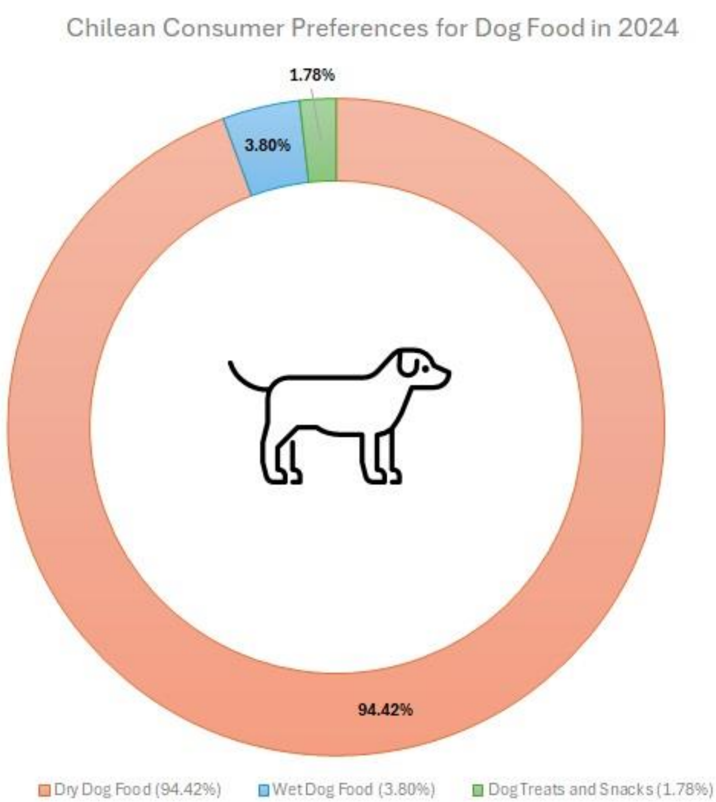


Figure 2: Chilean Consumer Preferences for Dog Food



Chilean consumer preferences for pet food in 2024 reflect a strong inclination toward dry food for both cats and dogs. For cats, 90.31 percent of purchases were dry cat food, followed by 9.36 percent for wet food and 0.32 percent for treats and snacks. Similarly, dog owners demonstrated a preference for dry dog food, accounting for 94.42 percent of purchases, with wet food at 3.80 percent and treats and snacks at 1.78 percent.

Purchase Drivers

The rise in pet ownership is closely tied to cultural and demographic shifts, such as declining birth rates, the increase in single-person households or child-free families, and the redefinition of the modern family, where pets play a central emotional role as "family members." Currently, 73 percent of Chilean households have at least one pet, reflecting a profound cultural transformation. Chile is emerging as one of the most dynamic markets in South America, with annual growth projected at five to seven percent.

The pet food industry has experienced significant growth and transformation in recent years, driven by evolving consumer attitudes and behaviors. The humanization of pets has led to greater investment in their care, particularly in the quality and variety of their nutrition. Pet owners are prioritizing premium and specialized food options that align with their pets' health needs and preferences, reflecting a deep emotional connection and a commitment to their well-being.

Additionally, the rise of e-commerce has revolutionized the way consumers access pet food products. Online platforms offer unparalleled convenience, enabling pet owners to explore and purchase a diverse range of items, including high-quality and niche products that were previously unavailable through traditional retail channels. This digital accessibility has empowered consumers to make more informed choices while enjoying the ease of home delivery. Furthermore, expert advice from veterinarians and nutrition specialists plays a crucial role in guiding these decisions. Pet owners increasingly seek professional recommendations to ensure their pets receive optimal nutrition tailored to their specific needs, underscoring the importance of trust and expertise in this growing market.

The industry has evolved toward more sophisticated consumption patterns, with a focus on specialized pet food, including hypoallergenic formulas, food for small breeds, sterilized pets, functional snacks, and gourmet options. Additionally, associated services have gained prominence, such as exclusive pet bakeries, veterinary hospitals within stores, adoption support programs, pet cemeteries, and even pet health insurance.

Competitive Landscape

The Chilean pet food market is characterized by a dynamic mix of major international players and emerging local brands, each contributing to the sector's rapid growth and diversification. Global leaders such as *Nestlé Purina*, *Mars Incorporated (Pedigree)*, *Royal Canin*, and *Hill's Science Diet*, maintain a strong presence in Chile, leveraging their established reputations, extensive product portfolios, and premium pricing strategies. These companies invest heavily in marketing campaigns and continuous product innovation to capture and sustain market share.

At the same time, local brands like *Master Dog* and *Master Cat* (*Empresas Carozzi S.A.*) also play a significant role in the market, appealing to budget-conscious consumers through affordability and accessibility. The rise of startups and smaller local companies focusing on sustainability, locally sourced ingredients, and niche products has further enriched the competitive landscape, catering to a growing demand for innovative and environmentally conscious options.

According to Euromonitor data, more than 25 companies operate in Chile's dog food market. However, four major conglomerates account for nearly 80 percent of the total market share:

For dog food:

- *Nutripro S.A.* (*Empresas Carozzi S.A.*) is the leading player with 29.5 percent of the market, with *Master Dog* being its top-selling brand at 20.5 percent market share.
- *Champion S.A.* (*Proa Group*) has a 17.9 percent market share, through its brands *Champion Dog*, and *Sabrokan*,
- *Mars Southern Cone Alimentos Ltda.* (Mars Incorporated) has a 15.9 percent market share with its brands *Pedigree* and *Eukanuba,*
- *Nestlé Chile S.A.* has a 15.6 percent market share. Its brand *Dog Chow* represents 6.7 percent of the market, while *Pro Plan* accounts for 5.8 percent.

For cat food:

- *Nestlé Chile* is the leading player, holding 30.1 percent of the market, primarily through its *Cat Chow* brand, which is the top-selling cat food in Chile, with a 20.1 percent market share.
- *Nutripro S.A*. (*Empresas Carozzi S.A.*) has an 18.8 percent market share through its brand *Master Cat.*
- *Mars Southern-Cone Alimentos Ltda.* (Mars Incorporated) holds 16.5 percent of the market share with its brand *Whiskas*.
- *Champion S.A.* (*Proa Group*) ranks fourth with a 13.1 percent market share. Its brands *Champion Cat* and *Sabrocat* represent 13 percent of the market.

Point of Sales

Four major channels drive pet food distribution in Chile, each addressing distinct consumer needs:

1. **Supermarkets** are the primary distribution channels for pet food in Chile. Chains like *Jumbo*, *Lider (Walmart)*, and *Tottus* dominate this channel, offering convenience by combining pet food purchases with regular groceries. They provide a wide selection of products from both local and international brands.

2. **Specialized Pet Stores**: chains such as *Pet Happy*, *SuperZoo* and *Petland*, along with independent shops, focus on premium and specialized diets. These stores offer personalized customer service and expert advice, making them a preferred choice for pet owners seeking tailored solutions.

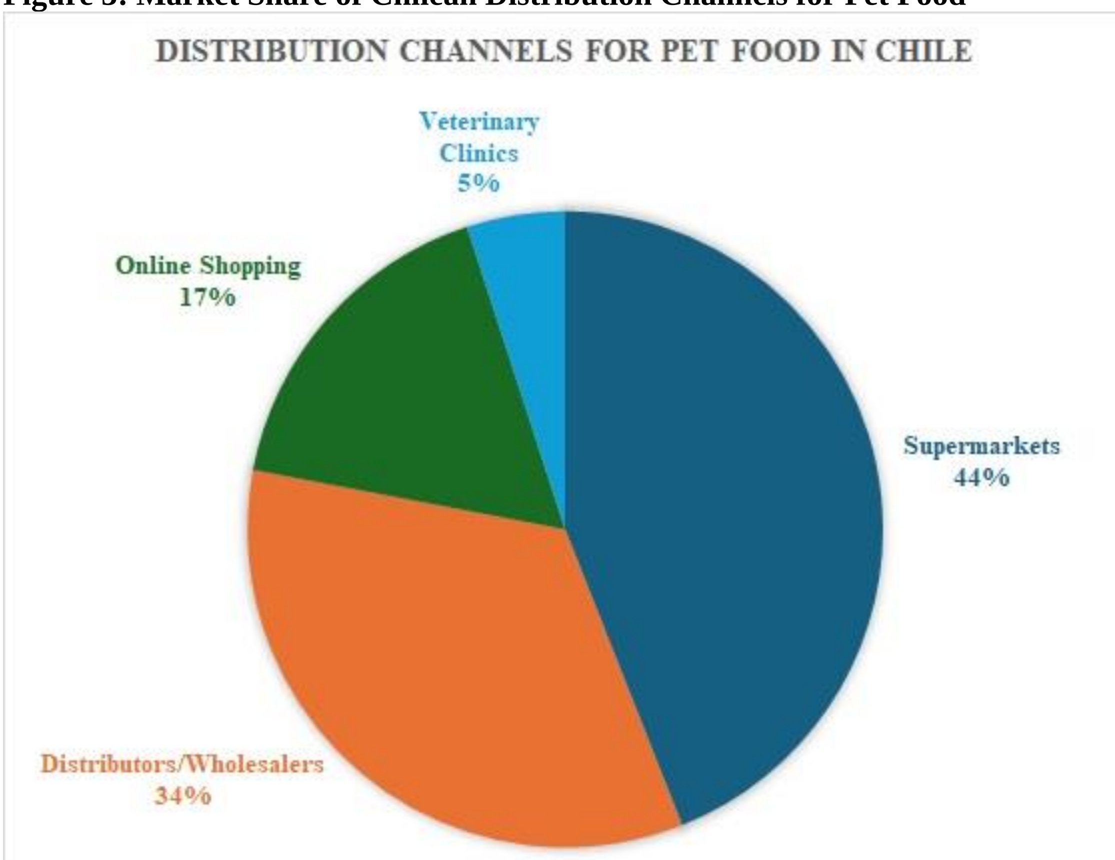
In 2019, Chile had 344 stores specializing in pet products. By 2023, this number skyrocketed to 2,942 stores nationwide, representing nearly a tenfold increase in just six years.

3. **E-commerce**: online platforms like *Bestforpets*, *Petco Chile*, and *Pethome* have grown rapidly due to the convenience of home delivery, competitive pricing, and subscription services. Promotions, discounts, and loyalty programs attract price-sensitive consumers, while the increasing use of smartphones and internet access drives growth in this channel.

4. **Veterinary Clinics** serve as key distributors of prescription and specialized pet food recommended by veterinarians for specific health needs. Both independent clinics and larger networks contribute to this trusted channel.

5. **Convenience Stores and Pharmacies**: these outlets have begun expanding their offerings to include pet products, reflecting the increasing demand for accessible pet care solutions.

Figure 3: Market Share of Chilean Distribution Channels for Pet Food



Source: *Cadem* (Center for Public Opinion Studies)

Supermarkets dominate as the leading purchasing channel for pet food in Chile, accounting for 44 percent of total pet-related purchases. Distributors and wholesalers follow as the secondlargest channel, representing 34 percent of purchases. E-commerce ranks third, capturing 17 percent of the market, while veterinary clinics hold fourth place, contributing 5 percent to overall pet food sales.

These spending patterns and preferences illustrate the evolving relationship between Chileans and their pets, with owners prioritizing quality, convenience, and variety in their purchases.

II. LOCAL PRODUCTION

Production Processes

Local pet food production in Chile is primarily focused on dry food; while the production of wet food is largely reliant on imports. Chilean manufacturing facilities are required to adhere to strict quality and food safety standards, which are regulated by institutions such as the Agricultural and Livestock Service (*Servicio Agrícola y Ganadero, SAG*). These regulations ensure that locally produced pet food meets the necessary requirements for both domestic consumption and potential export markets.

Table 4: Pet Food Leading Brands in Chile

Pet Food Leading Brands in Chile	
Company	**Brands**
Empresas Carozzi S.A.	*Master Dog, Master Cat, Cachupin* and *Animal Planet*
Nestlé Chile S.A.	*Purina (Dog Chow, Doko, Doguitos, Cat Chow, Gati and Friskies)* and *Pro Plan*
Mars Southern Cone Alimentos Ltda.	*Pedigree, Whiskas, Royal Canin*, and *Eukanuba*
Proa S.A.	*Champion Dog, Champion Cat, Sabrokan, Sabrocat* and *Champion Mini Pets*
Hill's Chile	*Hill's Science Diet* and *Prescription Diet*
Bokato	*Bokato*

Trends in Production

The Chilean pet food industry is increasingly embracing local ingredients and sustainable production practices to appeal to environmentally conscious consumers. This trend reflects a growing demand for products that not only prioritize pet health but also align with broader values of environmental stewardship and support for local economies. By incorporating locally sourced ingredients, companies are able to differentiate themselves in a competitive market while fostering a connection with consumers who value transparency and sustainability.

In addition to this shift, innovation is playing a key role in the sector's development. Chilean companies are investing in research and development to create specialized formulas that address specific pet needs, such as allergies, digestive issues, and aging-related concerns. Furthermore, the adoption of new technologies is enhancing the personalization of pet food and improving ingredient traceability. These advancements allow companies to offer tailored solutions while ensuring the highest standards of quality and safety, strengthening consumer trust and loyalty.

Local industry players have invested significantly in production and distribution, particularly larger companies that are preparing to export their products to international markets.

III. REGULATORY FRAMEWORK AND OVERSIGHT INSTITUTIONS

Regulatory Framework

The Agricultural and Livestock Service (SAG), under the Chilean Ministry of Agriculture, is the primary authority responsible for regulating the importation, production, and commercialization of pet food and chews. SAG's Regulation 1233/13, along with its subsequent amendments, outlines the sanitary requirements for manufacturing, importing, exporting, and distributing pet food and chews. Additionally, SAG's Regulation 6905/22 establishes the maximum allowable levels of contaminants in these products.

Oversight Institutions

SAG's core mission is to safeguard animals and plant health. This includes ensuring compliance with sanitary standards throughout the production and transportation of pet food and chews, authorizing imports, and certifying exports.

Import Procedures

To import pet food into Chile, exporters must comply with the following requirements and procedures:

1. **Sanitary Certification:** Products must be accompanied by a sanitary certificate issued by the competent authority in the country of origin. This certificate should specify the production establishment, product identification, quantity, net weight, exporter's name, destination, and type of transport. It must also include all necessary declarations relevant to the nature of the product.

2. **Certificate of Free Sale:** The product must be accompanied by an official document issued by the competent authority certifying that the product is legally sold or distributed within the domestic market of the country of origin.

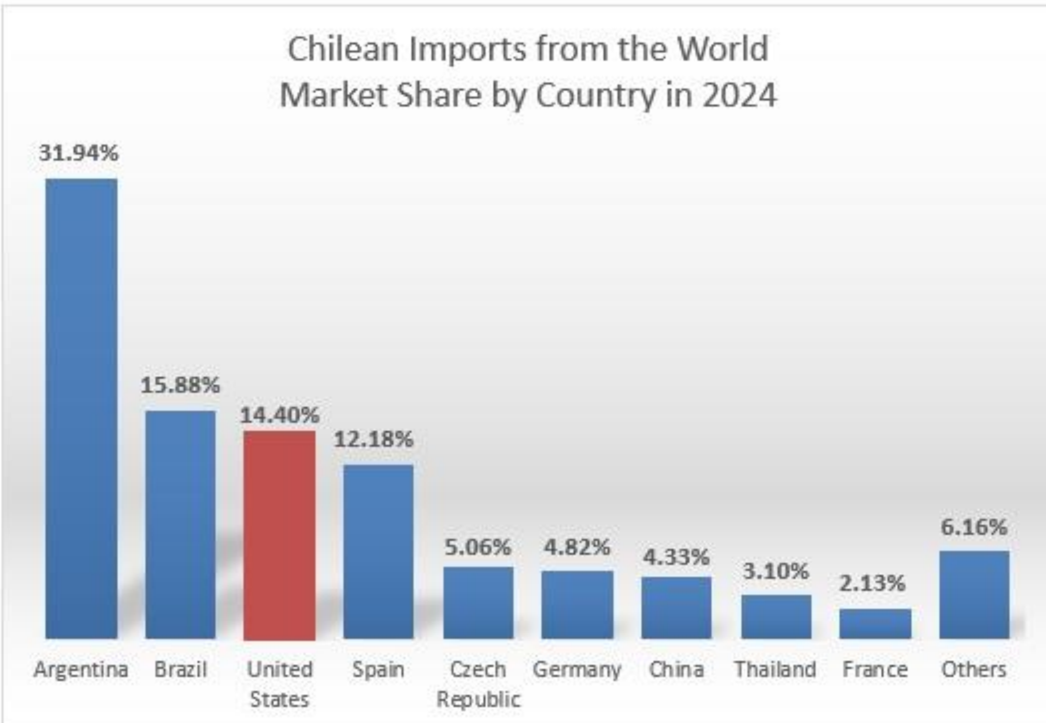
3. **Labeling:** Labels must be in Spanish and comply with the requirements established in Decree 4 of 2016 and its amendments, including all necessary product details.

IV. IMPORTS AND EXPORTS

Imports

In 2024, Chilean imports of pet food from the world increased by 9 percent totaling $264 million (Table 5). Argentina is the leading supplier of pet food imports with 31.94 percent market share worth $84.57 million. The United States was the third largest supplier of pet food, with a 14.4 percent market share worth $38.1 million. The figure represented an impressive increase of 32 percent over the previous year.

Figure 4: Chilean Dog and Cat Food Imports from the World by Country in 2024



Source: Chile National Customs Office

Amid a rising domestic pet food manufacturing industry and competition from international markets, the United States remained among the leading pet food suppliers to Chile, accounting for over 14 percent of market share in 2024.

Table 5: Chile Dog & Cat Food Imports from the World by Country (2020-2024)

Chile Dog & Cat Food Imports from the World							
Partner Country	**Import Value (USD)**						**Variation (%)**
	2019	**2020**	**2021**	**2022**	**2023**	**2024**	**2024/2023**
_World	$92,872,237	$112,235,984	$235,804,789	$269,935,904	$242,553,132	$264,806,034	9
Argentina	$37,607,508	$45,152,160	$95,952,335	$100,921,291	$94,702,671	$84,570,325	-11
Brazil	$17,972,424	$20,050,253	$35,789,123	$45,293,484	$31,654,667	$42,061,376	33
United States	$17,521,314	$22,457,273	$42,093,685	$46,706,904	$28,794,537	$38,130,306	32
Spain	$1,219,497	$1,389,668	$3,563,543	$9,770,180	$21,274,257	$32,247,047	52
Czech Republic	$3,308,289	$5,573,274	$12,636,956	$18,308,077	$19,995,292	$13,392,019	-33
Germany	$2,677,870	$4,310,879	$9,362,398	$9,999,742	$12,743,789	$12,762,838	0
China	$3,102,970	$3,176,611	$9,460,877	$12,542,026	$6,566,680	$11,468,344	75
Thailand	$450,123	$636,097	$2,328,213	$6,544,590	$9,161,248	$8,209,902	-10
France	$3,084,517	$2,011,173	$6,495,401	$4,040,596	$4,318,803	$5,639,397	31
Canada	$1,621,855	$2,143,109	$5,253,075	$5,869,965	$5,090,765	$4,635,878	-9
Source: Chile National Customs Office							

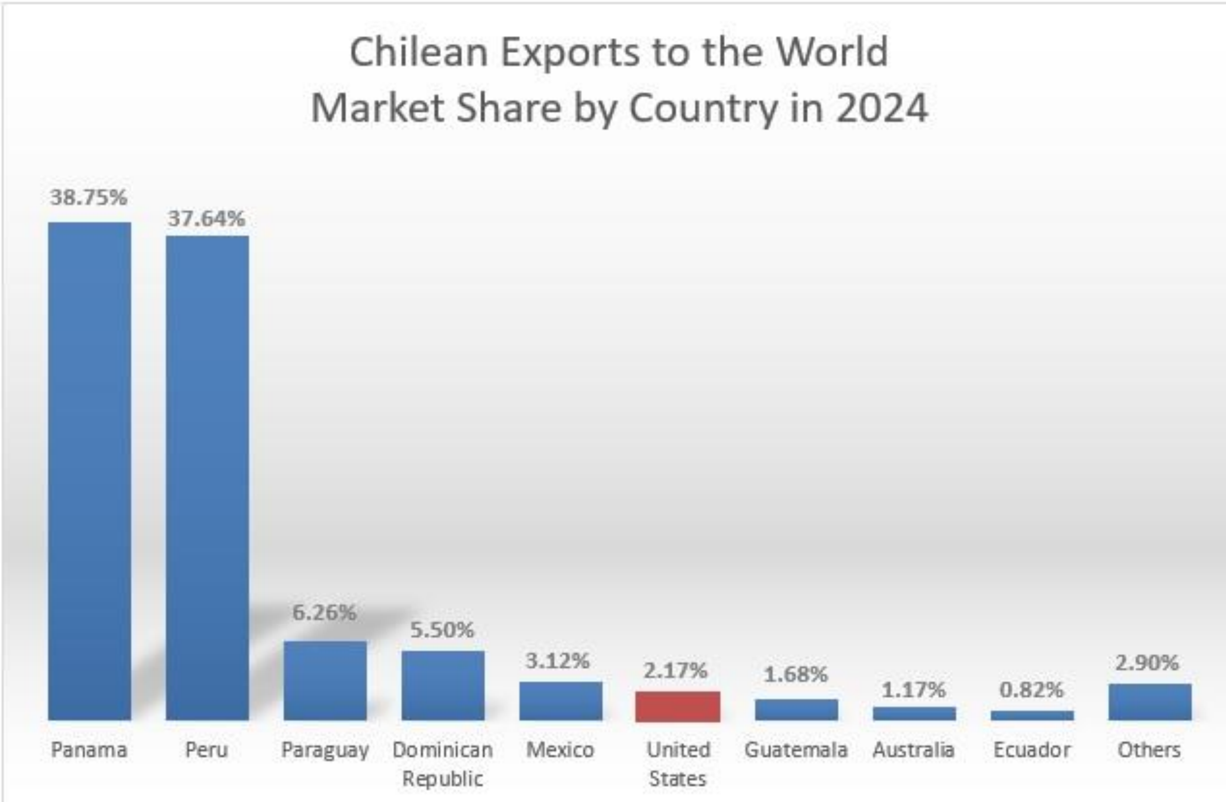
Dog and Cat Food
Total Import Value:
Top Suppliers:
Main Imported Products:

Exports

The growth of Chile’s pet industry has spurred the development of innovative business models, customized products, and high-value-added services. As Chile begins to establish itself as an exporter of pet products, Peru has been identified as a key market for regional expansion, offering a strategic opportunity to strengthen its presence in Latin America.

In 2024, Chile exported $9.2 million in dog and cat food, with Panama and Peru as the top destinations. The United States ranked as the sixth-largest market for these products with Chilean exports of $201,813, which are primarily retail-focused pet food.

Figure 5: Chilean Dog & Cat Food Exports to the World in 2024 (Market Share by Country)



Source: Chile National Customs Office

Table 6: Chile Dog & Cat Food Exports to the World by Country (2020-2024)

Chile Dog & Cat Food Exports to the World							
Partner Country	**Export Value**						**Variation (%)**
	2019	**2020**	**2021**	**2022**	**2023**	**2024**	**2024/2023**
_World	$3,144,244	$4,377,680	$6,606,593	$6,891,150	$10,060,227	$9,288,792	-8
Panama	$1,233,895	$1,538,343	$2,282,354	$2,862,044	$4,744,846	$3,598,953	-24
Peru	$508,103	$1,817,285	$2,858,176	$2,441,406	$3,309,553	$3,496,124	6
Paraguay	$423,082	$465,492	$605,410	$718,514	$626,049	$581,350	-7
Dominican Republic	$13,178	$56,257	$137,059	$217,241	$556,511	$510,458	-8
Mexico	$54,832	$39,187	$74,751	$38,676	$169,873	$289,421	70
United States	$393,172	$228,145	$313,828	$223,351	$48,193	$201,813	319
Guatemala	0	0	$118,873	$83,596	$61,726	$156,370	153
Australia	$208,596	$41,933	$45,445	0	$138,345	$108,294	-22
Ecuador	0	0	0	$1,248	$125,989	$76,520	-39
Costa Rica	$18,807	$25,900	$35,088	$64,706	$15,090	$60,408	300
Source: Chile National Customs Office							

Dog and Cat Food

Total Export Value: $9.2 million

Top Destinations: Panama, Peru, Paraguay, Dominican Republic, Mexico, and the United States.

Main Exported Products: Dog and cat food for retail sale

V. KEY CONTACTS AND FURTHER INFORMATION

Ministry of Agriculture - Agriculture and Livestock Service (SAG)
www.sag.gob.cl

Cámara Chileno-Americana de Comercio (AmCham Chile)
www.amchamchile.cl

National Institute of Statistics (INE)
www.ine.cl

National Customs Office
www.aduana.cl

Attachments:

No Attachments.