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Report Name: Chilean Meat Market Outlook

Country: Chile

Post: Santiago

Report Category: Livestock and Products

Prepared By: Sergio Gonzalez

Approved By: Amanda Hinkle

Report Highlights:

Pork production is forecast to grow modestly to 590,000 MT CWE in 2026, driven by productivity improvements rather than infrastructure expansion, while exports to key markets like China are expected to rise by two percent. Chicken production will increase to 740,000 MT RTC in 2026, supported by efficiency gains, with exports growing and imports declining. Beef production remains steady at 200,000 MT CWE, constrained by drought and competition from imports, which meet 70 percent of domestic consumption. Across all three commodities, consumption growth is marginal, reflecting stable economic conditions and limited domestic production expansion.

Commodity: Pork

Production: In 2026, Chile's pork production is forecast to reach 590,000 metric tons (MT) CWE, reflecting a modest increase. Production in 2025 is expected to remain steady on constraints such as the absence of new infrastructure projects. There are no plans to construct new pork production plants in the short term and the number of pork production facilities has not increased for at least a decade.

Feed constitutes the primary production cost in pork. Consequently, pork producers have invested heavily in optimizing feed rations, sourcing many ingredients, such as grains, from imports. Any growth in production will be primarily attributed to productivity improvements.

Table 1: Chile: Production, Supply, and Distribution for Swine Meat (1,000 MT CWE)

Meat, Swine Market Year Begins Chile	**2024**	**2025**	**2026**
	Jan 2024	**Jan 2025**	**Jan 2026**
Production	585	585	590
Total Imports	161	150	155
Total Supply	**746**	**735**	**745**
Total Exports	262	250	255
Total Dom. Consumption	484	485	490
Total Distribution	**746**	**735**	**745**

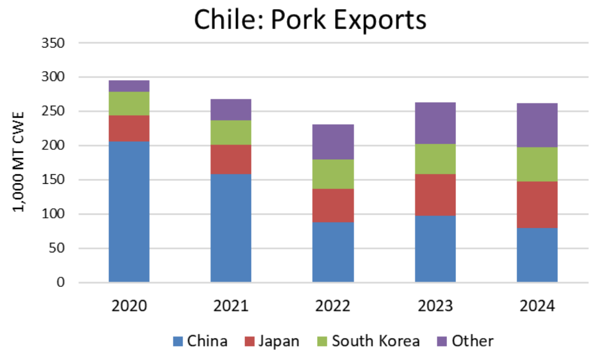
Source: Post estimates. Official USDA Data can be accessed at: PSD Online Advanced Query

Exports: Exports are forecast to rise two percent in 2026 as exporters seek higher prices in foreign markets despite production constraints. The main export destinations include China, Japan, and South Korea, with China being the largest market (Figure 1). Exports have struggled in 2025 due to weaker shipments to Japan and Korea from increased competition.

Imports: Despite weaker imports in 2025, shipments are forecast to slightly rebound in 2026. The primary suppliers are Brazil and the United States; Brazil continues to erode U.S. market share due to its price competitiveness (Figure 2).

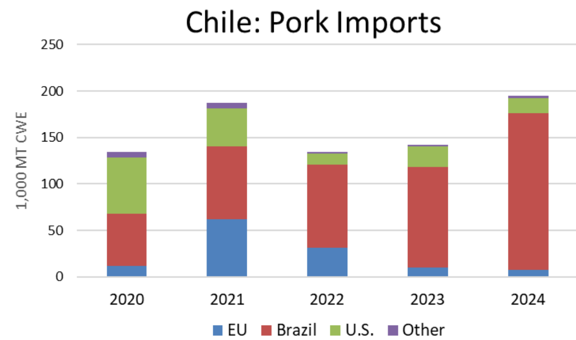
Consumption: Marginal growth in consumption will only keep pace with population growth, keeping per capita consumption to remain relatively flat. While consumption surged during the COVID pandemic, it has been largely stagnant in recent years as supplies remain relatively unchanged. Demand is also stagnant due to limited domestic production resulting in higher prices.

Figure 1: Chilean Pork Exports (MT CWE)



Source: Trade Data Monitor, LLC

Figure 2: Chilean Pork Imports (MT CWE)



Source: Trade Data Monitor, LLC.

Commodity: Chicken Meat

Production: Chile's chicken production is forecast to rise again in 2026 following relatively strong growth in 2025. There are no short-term plans to increase the number of chicken production facilities and growth comes from higher efficiency in the existing facilities. Import constraints amid firm demand for chicken will spur production growth.

Table 2: Chile: Production, Supply, and Distribution for Chicken Meat (1000 MT RTC)

Meat, Chicken Market Year Begins Chile	**2024**	**2025**	**2026**
	Jan 2024	**Jan 2025**	**Jan 2026**
Production	692	720	740
Total Imports	151	115	110
Total Supply	**843**	**835**	**850**
Total Exports	129	140	150
Total Dom. Consumption	714	695	700
Total Distribution	**843**	**835**	**850**

Source: Post Estimates. Official USDA Data can be accessed at: **PSD Online Advanced Query**

Imports: Chicken meat imports are forecast to decline in 2025 on short lived Highly Pathogenic Avian Influenza (HPAI)-related restrictions on Brazilian trade due to a commercial outbreak (May 2025). Brazil largely supplies chicken breast meat but has pivoted to shipping more prepared/preserved product to Chile (not subject to restrictions) in recent months. The shortfall in chicken breast meat could not be entirely backfilled by alternative suppliers such as Argentina and the United States.

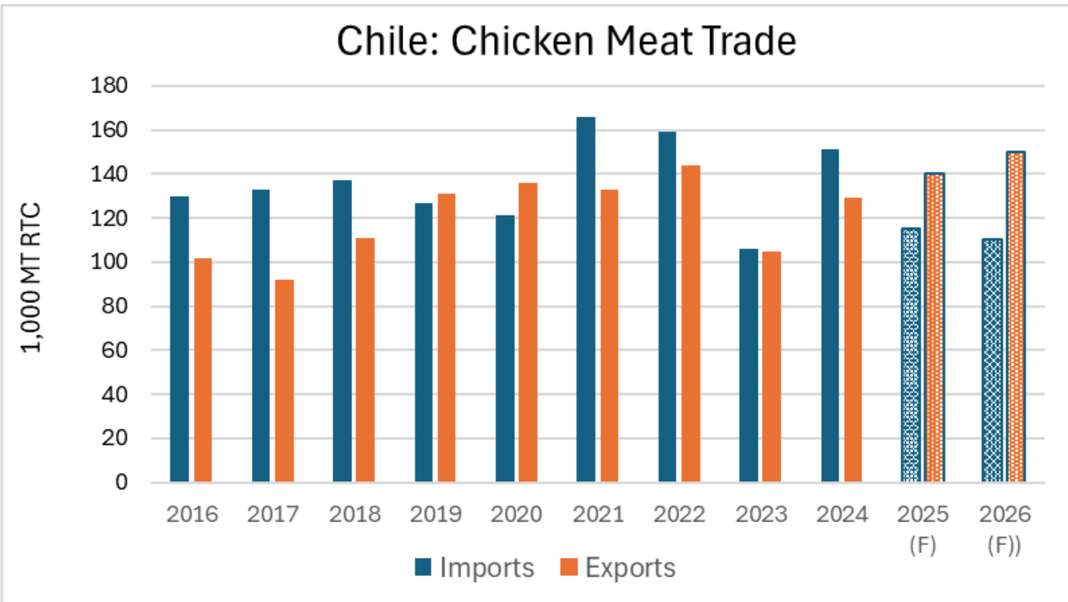
Exports: Chicken meat exports are expected to increase in both 2025 and 2026 with the United States remaining the largest market.

Chile and the United States are important trading partners in poultry meat. Chile exports chicken wings and chicken breasts to the United States, catering to the demand for these specific cuts. Conversely, the

United States, which is the second top supplier of chicken to Chile, exports frozen chicken leg quarters to Chile. The decline in imports of breast meat from Brazil will put some downward pressure on exports to supply those cuts to the domestic market.

Consumption: While Chilean chicken per capita consumption rose during the COVID pandemic, it has now returned to more historical levels and remains relatively flat. Marginal growth in consumption is supported by population and GDP growth.

Figure 3: Chilean Chicken Meat Trade Volume (MT)



Source: Trade Data Monitor, LLC.

Table 3: Chilean Chicken Meat Export Volume (MT)

Partner Country	Unit	Calendar Year					January-June		
		2020	2021	2022	2023	2024	2024	2025	Variation 2025/24
The World	MT	148,322	147,467	157,993	110,860	134,008	67,864	81,619	20%
United States	MT	33,557	46,142	50,122	31,467	37,706	19,190	20,292	6%
Mexico	MT	25,073	25,167	27,603	25,579	22,677	10,010	13,009	30%
Puerto Rico	MT	19,343	16,869	18,067	19,618	19,645	9,232	13,725	49%
Colombia	MT	17,869	16,619	11,509	5,506	12,888	7,665	5,599	-27%
Peru	MT	6,138	8,290	9,457	3,817	9,553	4,475	6,094	36%
Canada	MT	79	0	23	4,629	8,386	3,646	7,816	114%
Hong Kong	MT	46	0	0	1,483	5,783	3,569	1,213	-66%
Philippines	MT	0	4,954	10,993	3,435	5,637	3,378	5,325	58%
Others	MT	46,217	29,426	30,219	15,326	11,733	6,699	8,546	28%

Note: Includes chicken paws and excludes “salted poultry” (HS 021099).
Source: Trade Data Monitor, LLC.

Table 4: Chilean Chicken Meat Import Volume (MT)

Partner Country	Unit	Calendar Year					January-June		
		2020	2021	2022	2023	2024	2024	2025	Variation 2025/24
The World	MT	121,252	166,033	158,794	106,163	150,870	66,336	58,509	-12%
Brazil	MT	51,268	109,646	101,749	71,577	120,531	49,798	38,397	-23%
United States	MT	55,257	36,820	36,373	29,383	25,919	15,921	14,831	-7%
Argentina	MT	14,411	18,628	19,060	4,433	4,144	495	5,043	919%
China	MT	40	137	99	140	191	67	188	181%
Uruguay	MT	252	734	1,453	563	72	47	49	4%
Others	MT	24	68	60	67	13	8	1	-88%

Source: Trade Data Monitor, LLC.

Commodity: Beef

Production: Facing challenges such as drought, beef production in Chile is projected to reach 200,000 MT CWE in 2025 and 2026. The ongoing drought has led to water shortages, affecting crop yields and livestock production. Additionally, there is fierce competition from imports (Paraguay, Brazil, and Argentina), which further constrains production growth.

Table 5: Chile: Production, Supply, and Distribution for Beef and Veal Meat (1000 MT CWE)

Meat, Beef and Veal Market Year Begins Chile	2024 Jan 2024	2025 Jan 2025	2026 Jan 2026
Production	198	200	200
Total Imports	398	410	415
Total Supply	**596**	**610**	**615**
Total Exports	26	22	24
Total Dom. Consumption	570	588	591
Total Distribution	**596**	**610**	**615**

Source: Post Estimates. Official USDA Data can be accessed at: **PSD Online Advanced Query**

Exports: Exports are estimated to decline in 2025 due to lower shipments to China, Chile's top market. However, a rebound in exports is forecast in 2026 as strong demand in other markets (Colombia, Canada, United States) partially offsets lower shipments to China.

Imports: Beef imports are projected to increase to 415,000 MT CWE in 2026, up slightly from 410,000 MT CWE in 2025. Trade is driven by rising consumption and stable economic growth amid constrained domestic production. The main suppliers are Paraguay, Brazil, and Argentina with Brazil making the strongest gains and capturing increased market share in 2025 (Table 7).

Table 6: Chilean Beef Export Volume (MT CWE)

Partner Country	Unit	Calendar Year					January-June		
		2020	2021	2022	2023	2024	2024	2025	Variation 2025/24
The World	MT	28,139	20,824	27,513	25,846	26,439	14,338	12,814	-11%
China	MT	23,200	16,067	23,705	20,210	19,429	11,333	8,512	-25%
Colombia	MT	395	469	723	2,290	3,001	1,221	1,430	17%
Ecuador	MT	329	491	591	630	879	361	431	19%
Canada	MT	1,924	1,091	663	653	808	311	1,092	251%
Cuba	MT	774	660	394	615	774	364	142	-61%
Peru	MT	473	854	389	465	401	184	71	-61%
Spain	MT	118	193	330	326	340	157	191	22%
South Korea	MT	514	459	293	293	272	129	104	-19%
Costa Rica	MT	24	66	191	214	205	81	617	662%
United States	MT	169	272	0	9	10	8	49	513%
Others	MT	219	202	234	141	320	189	175	-7%

Source: Trade Data Monitor, LLC.

Table 7: Chilean Beef Import Volume (MT CWE)

Partner Country	Unit	Calendar Year					January-June		
		2020	2021	2022	2023	2024	2024	2025	Variation 2025/24
The World	MT	342,133	464,414	349,884	356,372	397,695	165,746	171,895	4%
Paraguay	MT	133,913	238,214	187,550	168,118	191,846	81,427	73,805	-9%
Brazil	MT	123,890	149,588	107,366	141,113	160,158	63,355	79,930	26%
Argentina	MT	74,748	47,089	32,617	27,200	33,325	14,329	13,612	-5%
Uruguay	MT	2,325	7,549	8,880	9,167	5,009	3,584	914	-74%
United States	MT	6,846	10,120	5,638	4,611	4,537	1,870	2,206	18%
Colombia	MT	227	11,629	7,716	5,747	2,591	1,034	1,368	32%
Others	MT	184	225	117	416	229	147	60	-59%

Source: Trade Data Monitor, LLC.

Consumption: Chilean beef production accounts for approximately 30 percent of domestic consumption, while the remaining 70 percent is met through imports.

Per capita consumption of beef increased in 2025 but is expected to remain relatively unchanged in 2026. A stable economic environment and rising disposable incomes are encouraging consumers to spend more on beef, contributing to the overall growth in demand.

Attachments:

No Attachments.