

COUNTRY MARKET INTELLIGENCE

Chile Market Intelligence

Market structure, procurement and commercial entry

October 2026

Report navigation

1	Market structure and commercial context	2
2	Macro purchasing power and finance	2
3	China supply and procurement competition	3
4	Digital channels and payment	4
5	Industrial and sector demand mechanisms	4
6	Import tariffs, taxes and customs	5
7	Technical and consumer compliance	6
8	Logistics and commercial entry	7
9	References	9

Reading this report

The data retains its stated period, currency and measurement scope. ExpandOcean Views interpret the commercial implications of each analytical module. Sources are linked beside factual claims. Data cutoff: 16 October 2026.

1 Market structure and commercial context

Its 2025 goods trade totaled **US\$199.667 billion**, including **US\$107.004 billion** in exports and **US\$92.662 billion** in imports. China held 32.7% of two-way trade, followed by the United States (17.0%), Brazil (6.3%), Japan (5.3%) and Argentina (4.0%) [1]. These are not import shares.

The import-side view is more directly relevant to supplier discovery. China supplied **28.5%** of Chile's 2025 goods imports, compared with the United States at 17.9%, Mercosur at 17.4%, the European Union at 12.9%, and CPTPP partners at 10.5%. Chile's customs and central-bank based trading system remains diversified even though China is its largest individual import origin [1]. Sellers enter established supply networks, not a blank market.

The importer base offers distinct routes to buyer discovery. SUBREI counted **43,462 importing enterprises in 2025** 55% were micro, small or medium-sized enterprises and 13.5% were large businesses [1]. Specialists offer route-to-market access; larger groups may use formal procurement teams. Segment outreach by importer scale, role and end market.

ExpandOcean View

Trade concentration is not buyer concentration

China's 28.5% share describes the origin of goods imports, not the share of Chilean importers buying from any one Chinese supplier. The 43,462-enterprise base, with a majority of micro, small and medium-sized importers, indicates a layered buyer universe: broadline distributors, sector specialists, and end-user procurement teams. Distinguish the importer of record from the commercial decision-maker and map each account to its purchasing function, sourcing cadence, compliance requirements and distribution footprint before treating a trade relationship as a sales lead.

2 Macro purchasing power and finance

Chile's GDP grew **2.5% in 2025**, supported by domestic demand, investment and consumption. Imports of goods and services increased, while net external trade contributed negatively to activity [2]. Headline trade growth is therefore not a standalone proxy for domestic demand.

Consumer purchasing conditions need a separate lens. The national CPI rose **3.5% over 2025**, while December prices fell 0.2% month-on-month [3]. In the April-June 2026 moving quarter, unemployment stood at **9.4%**, participation at 62.3% and employment at 56.4% [4]. These rates do not directly measure disposable income. Household buyers may prioritize landed price; industrial importers weigh total cost and uptime.

Quotes should account for exchange-rate movement between pricing, shipment and settlement. State currency, validity, payment milestones and freight/insurance basis; neither CPI nor GDP growth indicates an individual buyer's cash position.

ExpandOcean View

Qualify the buyer's funding window

GDP expansion in 2025 coexisted with 3.5% annual inflation and 9.4% unemployment in the latest cited 2026 quarter. Those indicators are not a prospect's credit rating. Establish whether demand is recurring, project-based or seasonal, who controls funding and when it is released. Compare order timing with inventory cycles and the buyer's contract or budget. Quote currency and validity, and clarify who bears freight, insurance and payment charges. These questions turn macro context into account-level commercial judgment without treating a country average as a credit conclusion.

3 China supply and procurement competition

China is already a core part of Chilean sourcing. The country's bilateral goods trade with China reached **US\$65.332 billion in 2025**, or 32.7% of Chile's trade with all partners. For procurement, the import-side figure matters: Chile imported **US\$26.410 billion** in goods from China, which represented 28.5% of its total goods imports. This amount was up from US\$21.146 billion in 2024 [1]. Do not confuse the larger bilateral two-way trade amount with goods imported from China.

China's import supply is weighted across different uses. In 2025 Chile sourced from China **US\$9.966 billion of consumer goods, US\$6.346 billion of capital goods, and US\$10.099 billion of intermediate goods** [1]. China represented 39.6% of Chile's consumer-goods imports and 30.7% of capital goods, while intermediate goods were 21.6%. Competition spans retail/resale, industrial equipment and production inputs; discovery must distinguish them.

Competition is organizational as well as price-led. Importers manage supplier qualification, paperwork, currency, freight, clearance and distribution. Buyers expect accurate landed costs, repeatable supply and quality evidence. Explain process value; China origin alone does not ensure tariff preference or acceptance.

ExpandOcean View

Sell lower friction, not origin alone

Chile's 2025 import mix shows China participating in consumer, capital and intermediate procurement, with material shares in each. That broad presence is proof of supplier-market familiarity, not proof that any new offer will displace incumbents. Stronger differentiation in buyer discovery comes from understanding the importer's specific purchasing gap: fragmented vendor coordination, documentation burden, replenishment timing or inconsistent specifications. Each outbound conversation should make one such gap testable through a carefully scoped inquiry, rather than rely on "direct from China" as the value proposition.

4 Digital channels and payment

Chile's retail-payment infrastructure is highly digitized. In a 2025 presentation citing the central bank's latest Payment Systems Report, the average person made **374 digital payments in the preceding year** across cards and account-to-account payments. The aggregate value equaled **112% of GDP**. The same presentation reported card payments at 74% of household spending, compared with 32% in 2016 [5]. They do not prove business buyers want marketplace transactions.

For B2B discovery, websites, professional profiles, procurement notices and trade directories help identify category coverage and buyer roles. Use Spanish-language pages to describe scope, provide technical and business information, and route prospects to a contact. For industrial sourcing, qualify with an importer or technical buyer rather than rely on consumer checkout behavior.

Payment access is strong, but payment acceptance and B2B settlement are not identical. Instant account-to-account payments are established and widely used, especially person-to-person; the central bank describes merchant-directed A2A interfaces as an area still developing [5]. Align documented settlement with the buyer's channel; confirm beneficiary, fees and currency.

ExpandOcean View

Use digital channels to qualify, then verify

Chile's measured digital-payment intensity supports a digital-first discovery funnel, but it does not imply that corporate sourcing decisions or international settlements happen inside consumer payment apps. Use digital touchpoints to identify procurement roles and capture a structured buying brief, then move toward verified company details, an agreed quotation and documented payment terms. Track decision-maker replies, specifications, quotations and repeat orders, not clicks alone. Use agreed milestones to surface stalled decisions, missing specifications and payment concerns early; these are practical conversion signals rather than mere exposure metrics.

5 Industrial and sector demand mechanisms

Chile's sector composition creates procurement through investment and operating supply chains. Mining earned **US\$63.253 billion** from goods exports in 2025, equivalent to 59.1% of the country's goods exports. Mining investment and maintenance draw on equipment, parts, electrical systems, transport and services; export value is not a procurement-budget measure [6]. SUBREI reported that 2025 imports rose in electric motors, generators and transformers by US\$1.105 billion, parts for other machinery and equipment by US\$1.043 billion, mining and construction machinery by US\$678 million, and trucks and cargo vehicles by US\$596 million versus 2024 [1]. These are observed import-category changes, not forecasts.

Food and agriculture create another set of buyer dynamics. Chile exported **US\$13.610 billion** in food products in 2025 and sold 600 distinct food types abroad [6]. Processing and export operations procure production, packaging, cold-chain, handling and quality-control inputs. Identify importer, end-use site and acceptance standards; food, plant or animal-related imports may require prior permissions or sanitary controls [7].

Manufacturing and retail display a different procurement rhythm. SUBREI reported import growth across clothing and equipment as well as machinery categories, while buyer needs vary between one-off investment, seasonal stock, maintenance replenishment and contract-backed purchasing [1]. Establish expected quantities, approval pathway, existing suppliers and who controls import declarations. Repeat conversion depends on reliable replenishment and shipment execution.

ExpandOcean View

Read demand through buying mechanisms

The strongest commercial signal in Chile's official 2025 import data is not a single "hot product" but increased purchases across machinery, electrical equipment, cargo vehicles and apparel. Mining investment, food processing and retail each turn into different procurement calendars and buyer roles. Translate an observed sector trend into a validation question—capital project, maintenance cycle, production input or stock replenishment—and pursue accounts whose buying mechanism is identifiable. National trade growth is useful for prioritization, not a substitute for buyer-level evidence.

6 Import tariffs, taxes and customs

Chile's general customs rule is **6% ad valorem duty on CIF value** (goods value plus freight and insurance) and **19% VAT on CIF plus ad valorem duty** [7]. On US\$1,000 CIF, the illustrative standard duty is US\$60 and VAT US\$201.40 (total US\$261.40 before other charges). Confirm classification, valuation and product rules for each shipment. A preference under the Chile-China Free Trade Agreement depends on the good meeting origin rules and the applicable tariff schedule. Chilean customs identifies product-specific origin rules and the 2019 deepening protocol; the agreement's tariff phase-out schedules include staged categories and exclusions [8]. Do not assume every shipment from China qualifies for a lower rate. Obtain the correct HS classification, determine origin qualification, and ensure evidence of origin is presented in the required form before calculating landed cost. Preferential treatment is for eligible goods with compliant origin documentation.

Since **25 October 2025**, international online purchases valued up to **US\$500** are subject to 19% VAT. For registered platforms, the VAT is collected at checkout; where the platform is not registered, the courier or postal operator collects it at import. Such purchases are not subject to an additional customs duty under this low-value rule [9]. This is distinct from commercial imports: the Aduana's commercial-import guidance states that goods above **US\$1,000 FOB** require an authorized customs broker; simplified self-clearance may apply to commercial goods up to that value, subject to the prescribed paperwork [7]. Confirm the transaction type, customs value, tariff line, origin and tax collection route with a Chilean customs broker before issuing a landed-price commitment.

ExpandOcean View

Price after eligibility, not before

The 6% general duty and 19% VAT provide a useful baseline only when applied to the correct customs value and transaction. For China-origin products, origin qualification and the relevant tariff schedule can change the duty; the post-October-2025 low-value online VAT pathway is another distinct case and is not a shortcut for commercial supply. Make tariff assumptions traceable in every quote: tariff classification, origin basis, CIF components, tax treatment and brokerage responsibility. Buyers can then compare landed cost on a consistent footing.

7 Technical and consumer compliance

Chile's controls are product-specific. The National Customs Service lists prior permits, certifications or approvals across regulated areas including food, alcohol, plants and animal products, pharmaceuticals and cosmetics, hazardous materials, and radio equipment [7]. Depending on the category, authorities include SAG, the Health Ministry or regional SEREMI, ISP and SUBTEL. Supplier documents do not replace local authorization.

For electrical and fuel-related goods, the Superintendencia de Electricidad y Combustibles (SEC) oversees the energy market and makes the SEC product seal and product-certification information available [10]. Determine whether the specific item falls within a mandatory certification scope before contracting or shipping. Technical files, test evidence, model identity, applicable Spanish labeling and certification-body coordination may be needed. Foreign certification does not automatically replace Chilean requirements.

EU rules are not Chilean implementation. Products sold in Chile are governed by Chilean law and agencies. EU requirements matter if specified by the buyer or goods also enter the EU, but do not replace Chilean approval. Verify product-specific labeling, safety and warranty obligations with a Chilean regulator or importer during lead qualification.

ExpandOcean View

Compliance is part of buyer discovery

In Chile, regulatory scope turns on what a product is and how it is used, not merely its shipping description. Asking about electrical certification, sanitary registration, radio authorization, labeling and importer responsibility early helps identify whether a prospect is commercially ready and who must approve the transaction. It also protects a sourcing relationship from late surprises: a competitive factory quote cannot compensate for an unapproved model or incomplete permit trail. Keep compliance evidence tied to exact model identifiers and the relevant Chilean regulator.

8 Logistics and commercial entry

Chile's geography makes delivery location and inland movement part of sourcing. San Antonio, a major central-region gateway, handled **23,855,311 tonnes of cargo and 2,060,244 TEU in 2025** containerized cargo accounted for 18,199,722 tonnes [11]. That throughput confirms material container infrastructure, but it does not establish a transit-time guarantee, a shipping schedule or the best port for every consignee. Route, port, carrier, seasonal capacity, congestion, customs clearance and inland delivery should be priced for the actual destination.

Trade documentation and consignee readiness shape the handoff. Customs asks commercial importers for core documents including transport document, commercial invoice and importer price declaration; packing list, insurance evidence, origin certificate and permits may be required according to the transaction [7]. The importer, customs broker, freight forwarder and supplier should agree who owns document preparation, filing, inspection, demurrage exposure and delivery appointment. Clear Incoterms, packaging data, carton or pallet dimensions, shipment milestones and exception escalation reduce execution ambiguity.

Map sector importers, identify the buying mechanism, and qualify the Spanish-speaking decision-maker on quantity, timing, specifications, compliance and payment. Follow delivery with quality and replenishment review.

ExpandOcean View

Make delivery reliability visible

San Antonio's 2025 activity shows the scale of Chile's container gateway, while Chile's geography means the port is only one leg of delivery. Record the Incoterm, port, inland destination, document owner, milestone updates and escalation contact. Track document readiness, clearance handoff, delivery acceptance and repeat-order interval alongside leads and quotes. Measure customs and inland performance against agreed terms, then review delivery acceptance and buyer feedback before pursuing replenishment. This operational record supports clearer follow-up and helps distinguish a one-off inquiry from an account with a recurring purchasing process. It provides a concrete basis for improving communication across buyer, broker and forwarder.

8.1 Measurement note

All trade amounts above are nominal US dollars and refer to calendar-year 2025 unless otherwise stated. Import-origin values are Chilean imports, not China's export mirror. For current decisions, recheck the tariff schedule, origin rule, regulator's product scope, freight terms and buyer-specific requirements. No forecast is presented as an actual result.

For a procurement discussion about Chile, [contact ExpandOcean International Limited](#).

9 References

- [1]** Informe Comercial 2025: Comercio Exterior de Chile
- [2]** Cuentas Nacionales de Chile: Evolución de la actividad económica 2025
- [3]** Índice de Precios al Consumidor de diciembre de 2025
- [4]** Tasa de desocupación nacional: abril-junio de 2026
- [5]** Chilean Economy and Digital Payments: Progress and Challenges
- [6]** 2025: Record exports for Chile
- [7]** National Customs Service: Import FAQs and customs procedures
- [8]** Chile-China Free Trade Agreement
- [9]** Digital VAT on international online purchases
- [10]** Superintendencia de Electricidad y Combustibles: SEC product seal and services
- [11]** Puerto San Antonio: cargo transfer figures