

# Retail in Chile

<https://marketpublishers.com/r/RBEEF126C765EN.html>

Date: May 2024

Pages: 105

Price: US\$ 2,100.00 (Single User License)

ID: RBEEF126C765EN

## Abstracts

A slow year in 2023 was a significant challenge for retail in Chile. Elevated inflation and steady price rises continued to impact the retail industry, leading to a steep drop in demand from consumers, who looked to postpone purchases as much as possible, increasingly looking at the second-hand and refurbished markets, as well as to informal sellers of products in all categories, as they attempted to find options that were better adapted to their budgets.

Euromonitor International's Retail in Chile report offers insight into key trends and developments driving the industry. The report examines all retail channels to provide sector insight. Channels include hypermarkets, supermarkets, discounters, convenience stores, mixed retailers, health and beauty retailers, clothing and footwear retailers, furniture and furnishing stores, DIY and hardware stores, durable goods retailers, leisure and personal goods retailers. There are profiles of leading retailers, with analysis of their performance and the challenges they face. There is also analysis of non-store retailing: vending; homeshopping; internet retailing; direct selling, as available.

Product coverage: Retail E-Commerce, Retail Offline.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

Get a detailed picture of the Retail market;

Pinpoint growth sectors and identify factors driving change;

Understand the competitive environment, the market's major players and

leading brands;

Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## Contents

Retail in Chile  
Euromonitor International  
March 2024

### LIST OF CONTENTS AND TABLES

#### RETAIL IN CHILE

##### EXECUTIVE SUMMARY

Retail in 2023: The big picture

Greater connection between digital and physical still needed

Local consumers are searching for innovation

What next for retail?

##### OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 Standard Opening Hours by Channel Type 2023

Seasonality

Christmas and New Year

Back to School

Independence Day

##### MARKET DATA

Table 1 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 2 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 3 Sales in Retail Offline by Channel: Value 2018-2023

Table 4 Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 5 Retail Offline Outlets by Channel: Units 2018-2023

Table 6 Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 7 Sales in Retail E-Commerce by Product: Value 2018-2023

Table 8 Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 9 Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 10 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 11 Sales in Grocery Retailers by Channel: Value 2018-2023

Table 12 Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 Grocery Retailers Outlets by Channel: Units 2018-2023

Table 14 Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 15 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 18 Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 20 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 21 Retail GBO Company Shares: % Value 2019-2023

Table 22 Retail GBN Brand Shares: % Value 2020-2023

Table 23 Retail Offline GBO Company Shares: % Value 2019-2023

Table 24 Retail Offline GBN Brand Shares: % Value 2020-2023

Table 25 Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 26 Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 27 Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 28 Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 29 Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 30 Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 31 Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 32 Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 33 Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 34 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 35 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 36 Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 37 Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 38 Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 39 Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 40 Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 41 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 42 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 43 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 44 Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 45 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 46 Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 47 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 48 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space

2023-2028

Table 49 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 50 Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 51 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 52 Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 53 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 Research Sources

CONVENIENCE RETAILERS IN CHILE

KEY DATA FINDINGS

## **2023 DEVELOPMENTS**

Standalone stores driven by forecourt retailers as latter continue to expand

Spid continues to expand, bringing Cencosud closer to consumers

OXXO retains leadership of outlet numbers but gains attention of competition authorities

PROSPECTS AND OPPORTUNITIES

Innovation of certain product lines can increase foot traffic

Space for alliances and digital payments within convenience retailers

New player Gulf enters forecourt retailers

CHANNEL DATA

Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 56 Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2023-2028

Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth

2023-2028

DISCOUNTERS IN CHILE

KEY DATA FINDINGS

## **2023 DEVELOPMENTS**

Slowing sales and outlet expansion for discounters following surge in 2022

Walmart's Bodega ACuenta remains overall leading discounter chain

No new players enter Chilean discounters in 2023

PROSPECTS AND OPPORTUNITIES

Discounters not expected to experience significant change over the forecast period

Private label remains important, but needs stronger development

E-commerce development still lags behind competing channels

CHANNEL DATA

Table 65 Discounters: Value Sales, Outlets and Selling Space 2018-2023

Table 66 Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 67 Discounters GBO Company Shares: % Value 2019-2023

Table 68 Discounters GBN Brand Shares: % Value 2020-2023

Table 69 Discounters LBN Brand Shares: Outlets 2020-2023

Table 70 Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 71 Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

HYPERMARKETS IN CHILE

KEY DATA FINDINGS

## **2023 DEVELOPMENTS**

Security concerns remain top of mind for hypermarket operators

Cencosud focuses on launching new payment capabilities

Walmart Chile launches Marketplace to further align with its global strategy

PROSPECTS AND OPPORTUNITIES

Established chains likely to focus on omnichannel approach

Players to increasingly focus on expanding offer, including private label

Loyalty rewards to regain importance in Chile

CHANNEL DATA

Table 72 Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 73 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 74 Hypermarkets GBO Company Shares: % Value 2019-2023

Table 75 Hypermarkets GBN Brand Shares: % Value 2020-2023

Table 76 Hypermarkets LBN Brand Shares: Outlets 2020-2023

Table 77 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 78 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

**SUPERMARKETS IN CHILE**

**KEY DATA FINDINGS**

## **2023 DEVELOPMENTS**

Supermarkets remains important grocery channel, with store numbers continuing to dynamically grow

Technologically-driven engagement not a focus for players

Independent and regional players continue to experience limited growth

**PROSPECTS AND OPPORTUNITIES**

Lower prices via supermarkets set to increase in number to combat competition

Opening of outlets to remain an area of focus over the forecast period

E-commerce to increasingly become part of omnichannel strategies

**CHANNEL DATA**

Table 79 Supermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 80 Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 81 Supermarkets GBO Company Shares: % Value 2019-2023

Table 82 Supermarkets GBN Brand Shares: % Value 2020-2023

Table 83 Supermarkets LBN Brand Shares: Outlets 2020-2023

Table 84 Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 85 Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

**SMALL LOCAL GROCERS IN CHILE**

**KEY DATA FINDINGS**

## **2023 DEVELOPMENTS**

Chileans appreciate the chance to buy local and benefit their communities

Issues accessing funds limits expansion and innovation for small local grocers

Innovation and specialisation key elements going forward

**PROSPECTS AND OPPORTUNITIES**

Small local grocers expected to lose ground over forecast period

Shifting cities to become a challenge in the coming years

Channel players to remain relevant by offering additional services

**CHANNEL DATA**



Table 86 Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023

Table 87 Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 88 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 89 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## APPAREL AND FOOTWEAR SPECIALISTS IN CHILE

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Independent players experience a difficult year

Multitiendas Corona revamps and leverages omnichannel strategy to remain on top

H&M expands and remodels flagship store

### PROSPECTS AND OPPORTUNITIES

Continual arrival of international brands but local players to focus on slow fashion

Luxury, while niche, set to record important growth

Department stores and e-commerce to remain significant competitors to specialists

### CHANNEL DATA

Table 90 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 91 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 92 Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 93 Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 94 Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 95 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 96 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## APPLIANCES AND ELECTRONICS SPECIALISTS IN CHILE

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Promotional activities in attempt to drive sales of appliances and electronics in 2023

ABC DIN looks to merge with La Polar in a process that is likely to extend into 2024

Independent players continue to experience challenging times



## PROSPECTS AND OPPORTUNITIES

Inflation likely to remain a concern heading into 2024

E-commerce will continue to place pressure on physical specialists

Opportunities can be found in sustainability

## CHANNEL DATA

Table 97 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 98 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 99 Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 100 Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

Table 101 Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023

Table 102 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 103 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## HEALTH AND BEAUTY SPECIALISTS IN CHILE

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Pharmacies continues to expand, while ownership of Farmacias Ahumada is changing

Beauty specialist Maicao sees new opportunity in offering pharmacy products

By partnering with Kiko Milano, DBS Beauty Store achieves a long sought-after goal

## PROSPECTS AND OPPORTUNITIES

K-Beauty to gain new followers, and focused retailers to expand store footprint

Greater competition for pharmacies likely over the forecast period

Loyalty propositions can be leveraged for increased purchases

## CHANNEL DATA

Table 104 Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 105 Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 106 Sales in Health and Beauty Specialists by Channel: Value 2018-2023

Table 107 Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023

Table 108 Health and Beauty Specialists GBO Company Shares: % Value 2019-2023

Table 109 Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023

Table 110 Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023

Table 111 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 112 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 113 Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028

Table 114 Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

## HOME PRODUCTS SPECIALISTS IN CHILE

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Further shift online forces channel players to adjust strategies

Pet shops and superstores stand out in terms of outlet growth

IKEA finds a stronger footing in the local market

### PROSPECTS AND OPPORTUNITIES

Sustainability set to be an important topic in the channel over the forecast period

Easy and Sodimac to reactivate a more intense opening of stores

No new international arrivals mentioned for the near future

### CHANNEL DATA

Table 115 Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 116 Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 117 Sales in Home Products Specialists by Channel: Value 2018-2023

Table 118 Sales in Home Products Specialists by Channel: % Value Growth 2018-2023

Table 119 Home Products Specialists GBO Company Shares: % Value 2019-2023

Table 120 Home Products Specialists GBN Brand Shares: % Value 2020-2023

Table 121 Home Products Specialists LBN Brand Shares: Outlets 2020-2023

Table 122 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 123 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 124 Forecast Sales in Home Products Specialists by Channel: Value 2023-2028

Table 125 Forecast Sales in Home Products Specialists by Channel: % Value Growth

2023-2028

GENERAL MERCHANDISE STORES IN CHILE

KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Further sales decline for physical department stores in 2023

Falabella remains challenged in terms of adapting to changing times

La Polar and ABC DIN merger approved

PROSPECTS AND OPPORTUNITIES

Value growth to return to more stable levels over the forecast period

Leading players set to resume opening of outlets

E-commerce will continue to cannibalise sales of department stores

CHANNEL DATA

Table 126 General Merchandise Stores: Value Sales, Outlets and Selling Space  
2018-2023

Table 127 General Merchandise Stores: Value Sales, Outlets and Selling Space: %  
Growth 2018-2023

Table 128 Sales in General Merchandise Stores by Channel: Value 2018-2023

Table 129 Sales in General Merchandise Stores by Channel: % Value Growth  
2018-2023

Table 130 General Merchandise Stores GBO Company Shares: % Value 2019-2023

Table 131 General Merchandise Stores GBN Brand Shares: % Value 2020-2023

Table 132 General Merchandise Stores LBN Brand Shares: Outlets 2020-2023

Table 133 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling  
Space 2023-2028

Table 134 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling  
Space: % Growth 2023-2028

Table 135 Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028

Table 136 Forecast Sales in General Merchandise Stores by Channel: % Value Growth  
2023-2028

DIRECT SELLING IN CHILE

KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Beauty and personal care remains most important product category for direct selling

Competition for direct selling from other retail channels

Natura & Co sells The Body Shop to focus on direct selling

## PROSPECTS AND OPPORTUNITIES

Experiences still limited in the channel

No new players likely to enter direct selling in the short term

Channel mix to remain stable in Chile

## CHANNEL DATA

Table 137 Direct Selling by Product: Value 2018-2023

Table 138 Direct Selling by Product: % Value Growth 2018-2023

Table 139 Direct Selling GBO Company Shares: % Value 2019-2023

Table 140 Direct Selling GBN Brand Shares: % Value 2020-2023

Table 141 Direct Selling Forecasts by Product: Value 2023-2028

Table 142 Direct Selling Forecasts by Product: % Value Growth 2023-2028

## VENDING IN CHILE

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Vending innovations extremely rare

Lider al Paso concept from Walmart continues expansion in Chile

## PROSPECTS AND OPPORTUNITIES

Greater efforts in terms of innovation likely over the forecast period

Vending likely to further adapt to demand for more efficient and cashless payments

## CHANNEL DATA

Table 143 Vending by Product: Value 2018-2023

Table 144 Vending by Product: % Value Growth 2018-2023

Table 145 Vending GBO Company Shares: % Value 2019-2023

Table 146 Vending GBN Brand Shares: % Value 2020-2023

Table 147 Vending Forecasts by Product: Value 2023-2028

Table 148 Vending Forecasts by Product: % Value Growth 2023-2028

## RETAIL E-COMMERCE IN CHILE

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Costs of shipping drive consumers to click-and-collect

Home products and groceries continue to drive e-commerce sales in 2023

Key players maintain channel leadership

## PROSPECTS AND OPPORTUNITIES

E-commerce set for further growth, but players still need to review omnichannel strategies

Loyalty programmes to gain importance in attracting consumers

Marketplaces to remain dynamic driver of e-commerce growth

#### CHANNEL DATA

Table 149 Retail E-Commerce by Channel: Value 2017-2022

Table 150 Retail E-Commerce by Channel: % Value Growth 2017-2022

Table 151 Retail E-Commerce by Product: Value 2017-2022

Table 152 Retail E-Commerce by Product: % Value Growth 2017-2022

Table 153 Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 154 Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 155 Forecast Retail E-Commerce by Channel: Value 2022-2027

Table 156 Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027

Table 157 Forecast Retail E-Commerce by Product: Value 2022-2027

Table 158 Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

## I would like to order

Product name: Retail in Chile

Product link: <https://marketpublishers.com/r/RBEEF126C765EN.html>

Price: US\$ 2,100.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/RBEEF126C765EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970