

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Required Report - public distribution

Date: 4/27/2018

GAIN Report Number: CI1812

Chile

Food Processing Ingredients

Chile Food Processing Ingredients Report

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Report Highlights:

Chilean food industry is the main productive activity in the country with annual sales of \$34 billion. Healthy foods, gourmet products, prepared foods, and ready-made meals are products that show huge potential for growth in the Chilean market. New ingredients are being used in the production of healthier products especially those adapted to consumers with food intolerances, such as lactose and gluten free products. Consumers have an increasing concern for health issues while the food processing industry is trying to adapt to the nutritional labeling law, higher labor costs, and sophisticated customers, all of which present challenges, but also opportunities for U.S. high value added foods and ingredients such as natural additives, preservatives, thickeners and sweeteners.

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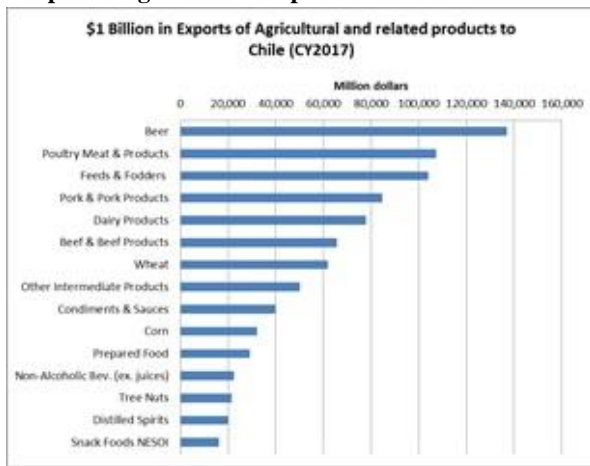
Santiago

MARKET FACT SHEET: CHILE

Executive Summary

Chile is a South American country that borders the South Pacific Ocean, Argentina, Bolivia, and Peru. Chile is separated into 15 regions, of which Santiago, the capital of Chile, is the most densely populated with 7.5 million (MM) out of the 17.6 MM citizens. The national GDP in 2017 was \$295 billion. GDP per capita in current prices grew by 5.2 percent and reached \$16,965 in 2017 (based in Chilean Central Bank data). This is the highest in the Latin American region and is one of the main drivers for consumer spending. The GDP growth decreased from 5 percent in 2013 to 1.6 percent in 2017, due to low copper prices, lower private investment and domestic consumption. World Bank predicts Chile’s GDP will recover and grow by 3 percent in 2018. Consumer spending is projected to have a real growth of 3.6 percent following 2018.

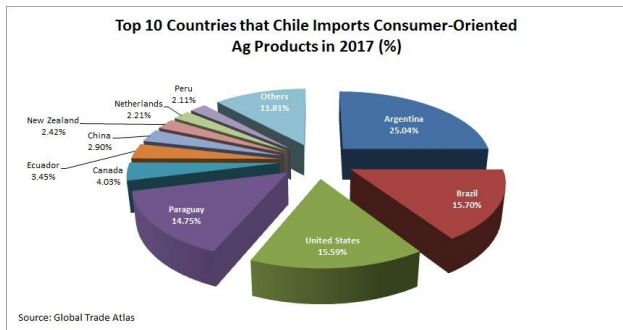
Top U.S. Agricultural Exports to Chile



Source: U.S. Census Bureau Trade Data

Imports of Consumer-Oriented Agricultural Products

Chile is the top market for U.S. “consumer-oriented products” in South America. This category of products represented 68 percent of all U.S. agricultural and related exports to Chile in 2017 reaching a value of \$676 MM and a 40 percent increase over 2016, the highest level of exports recorded so far. Top products exported to Chile are beer, poultry, pork, beef, dairy products, condiments and sauces.



Source: Global Trade Atlas

Food Processing Industry

Chile has a modern and developed food processing industry that represents 25 percent of Chile’s economy, and is forecast to grow to more than 35 percent by 2030. The food and beverage industry is expected to grow by 6.6 percent annually until 2019. Chile is among the top ten agricultural exporters in the world. Their main export commodities are: fish, seafood, wine, fresh fruit, dairy and meat products. Healthy foods, gourmet products, prepared foods and ready-made meals are products that show huge potential for growth in the Chilean market. New ingredients are being used in the production of healthier products especially those adapted to consumers with food intolerances, such as lactose and gluten free products. Consumers have an increasing concern for health issues while the food processing industry is trying to adapt to the nutritional labeling law, higher labor costs, and sophisticated customers, all of which present challenges, but also opportunities for U.S. high value added foods and ingredients such as natural additives, preservatives, thickeners and sweeteners.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2017: \$676 MM

Top 10 Food Processing Companies in Chile (by Marketshare in 2017)

- | | |
|--------------------------|-----------------------------|
| 1. Agrosuper S.A. | 6. Colun Ltda. |
| 2. Nestlé Chile S.A. | 7. Evercrip Snacks S.A. |
| 3. Empresas Carozzi S.A. | 8. Unilever Chile Food S.A. |
| 4. Watt’s S.A. | 9. Cial Alimentos S.A. |
| 5. Soprole S.A. | 10. Arcor Chile S.A. |

Food and Beverage Trends in Chile for 2018:

Healthy foods (natural derived, with few preservatives and additives); healthy snacks; healthy beverages (natural ingredients, functional drinks); ready-to-eat foods; frozen meals; sweeteners; natural additives, natural preservatives, thickeners and ingredients for food intolerance products (like lactose and gluten free products).

GDP/Population 2017

Population: 17.6 MM
 GDP: \$295 MM
 GDP Per Capita: \$16,965

Sources: Global Trade Atlas, Euromonitor, and trade interviews

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SECTION I. MARKET SUMMARY

Chile has an open economy and is very committed to trade liberalization. Chile has 26 trade agreements with 66 economies - notably the U.S.-Chile Free Trade Agreement (FTA), which entered into force in 2004. As of 2015 all trade tariffs have been successfully eliminated and 100 percent of all U.S. exports enter Chile duty-free. Chilean exports reach markets that represent 86.3 percent of the global GDP with privileged tariff conditions. Since the FTA came into effect in 2004, U.S. exports to Chile have grown 700 percent. In contrast, Chilean agricultural exports to the U.S. have grown by 90 percent. Chile sends 28 percent of its agricultural exports to the U.S. making it the largest market for Chilean agricultural products. Chile is the 27th largest market in the world and the 4th market in Latin America for U.S. food and agricultural products.

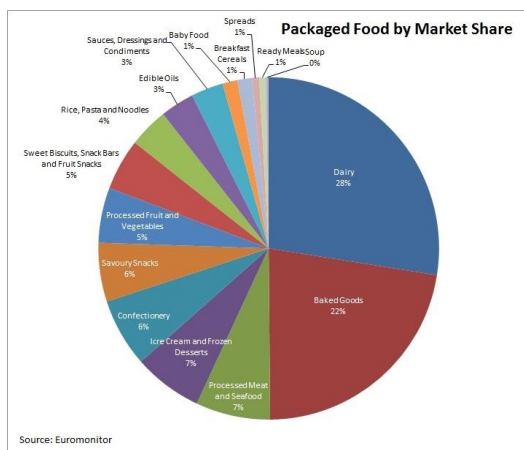
According to the Chilean Central Bank, the food manufacturing industry (food, drinks, and tobacco) represented 4.9 percent of overall GDP in 2017, with industry value rising by 4.4 percent over 2016. [Chilealimentos](#), the Chilean Association of Food Processing companies, reports that the Chilean food industry is the main productive activity in the country, with annual sales of \$34 billion. Furthermore, 54 percent of total food production is destined to the domestic market and 46 percent is exported to more than 190 countries worldwide. According to Chilean Central Bank data, food exports in 2017 totaled \$16.1 billion.

[InvestChile](#) reports that 76 percent of the food industry consists of fresh production (agriculture) and 23 percent is made up of processed foods (food processors). Supporting the food processing industry in Chile is a strategic objective of InvestChile. Their objective is diversifying the economy and move beyond exports of primary agricultural products to more complex, value-added products.

The conditions in Chile favor the food processing industry due to three main reasons: (1) the natural conditions, such as various climatic zones from the desert to the Antarctic, allow a vast array of products to be produced; (2) its location in the southern hemisphere offers counter-seasonal production for Europe and the United States, which is very attractive for international food processing countries that depend on the all-year supply of agricultural products; (3) Chile's is geographically isolated, owing to its location between the Andes Mountains in the east and the Pacific Ocean in the west, and enforces strict regulation on food imports further protecting the local production from most foreign diseases and pests.

Thanks to Chile's reputable and stable investment environment, multinational food manufacturers have invested in Chile for years. Nestlé, for example, opened its manufacturing plant in Chile in 1936 and has become an important employer and economic actor in the region. PepsiCo built its first plant in Chile in 1982 and has since opened 25 distribution centers, employing more than 2,000 people.

The value of the food processing industry in 2017 was composed of the following main categories:



Graph 1: Packaged Food by Market Share

In terms of value sales, dairy is the largest category reaching \$4.2 billion in 2017. The sector is further expected to rise to \$4.9 billion by 2022, representing a 3.2 percent CAGR (Compound Annual Growth Rate). The second largest category is baked goods, with a 2017 value of \$3.4 billion. Sales of breakfast cereals reached \$209 MM, and are predicted to show strong CAGR of 8.4 percent between 2017 and 2022.

<u>ADVANTAGES</u>	<u>CHALLENGES</u>
The U.S. is a strong trading partner for Chile: The U.S.-Chile Free Trade Agreement (FTA) facilitates commerce.	Chile has FTAs with 66 countries worldwide, and they do not depend on imports from a specific region. Instead, imports that offer the best price and quality worldwide are the most attractive.
Products from the U.S. are perceived as being of high quality, especially meat (revealed in interviews).	Chilean customers are accustomed to competitive prices due to the openness of the economy. Moreover, economic slowdown has increased their price-sensitivity.
Demand for healthier ingredients has increased due to food processors that are seeking solutions to produce foods which do not exceed the nutritional limits set by the 2016 nutritional labeling laws.	The nutritional labeling laws could increase costs of packaging products.
U.S. products and ingredients are known to be innovative and to follow new trends.	The establishment of personal relationships is often not a priority for U.S. companies. Chileans value face-to-face meetings and strong personal relationships.
Distributors are still the main channel for imports to enter Chile. Only the largest players are able to build up the infrastructure and invest in facilities to be able to import directly and small food processors still relay mainly on distributors to import products.	Most U.S. companies prefer to use “traders” and are not used to export directly.
Demand for premium processed foods and beverages that provide convenience and health benefits continue to increase.	Healthy foods are often considered premium or gourmet foods.

SECTION II. ROAD MAP FOR MARKET ENTRY

A) ENTRY STRATEGY

The Office of Agricultural Affairs in Santiago, Chile, advises U.S. exporters to check that their products meet the most up to date Chilean regulations to ensure a straightforward entry strategy into this market. FAS Santiago maintains listings of Chilean potential importers and develops sector-specific information to help U.S. exporters introduce U.S. products into Chile. Critical considerations for market entry include the following:

- U.S. exporters of food ingredients have two main ways of entering the Chilean market: by selling to distributors or exporting directly to Chilean companies.
- The use of distributors, agents or representatives depends on the type of product and on the size of the food processing company. Smaller food processors will often not present the volume and expertise to import directly, whereas larger food processors might prefer to buy directly in order to benefit from more competitive prices, and to further avoid paying commissions to intermediaries. Larger food processors reported to be generally willing and open to import in the case that the products are competitive in price and quality.
- Smaller processors are most likely to make use of a distributor. Distributors offer a variety of services like packaging, quality control and food safety inspection.
- Alternatively, U.S. food ingredients exporters that plan to sell large volumes of their products can establish a local subsidiary or set up a local office. Once successfully established, these producers may decide to expand operations and use Chile as an exporting platform for the Latin American region. Establishing a location production guarantees customer service, product quality, and helps to establish a strong local presence.
- The main entry for imports to Chile is via seaports, the most important ones being San Antonio and Valparaiso. Once goods have entered Chile, they are transported via highways.
- Personal relationships are extremely important in Chile, as such, it is recommended to build connections in order to become a trusted business partner. This may rely on good customer services, such as personal visits and extensive follow-up. This can be achieved either directly or by hiring a local representative. It is worth noting that the reputation of a foreign supplier is strongly affected by the quality of its representative. Additionally, foreign

suppliers that want to enter the Chilean market should seek to make use of already existing relationships they might have with international food processing companies. Having a contact often makes market entry easier.

- U.S. suppliers should offer a strong value-added proposition to Chilean counterparts that showing that they are competitive in quality, prices and payment conditions. Chile is an open economy and the food industry is very competitive.
- To be an attractive alternative to domestic producers, quality must be high. Moreover, companies that import ingredients from the U.S. report that good payment conditions are relevant selection criteria of business partners. These conditions have to be competitive with European suppliers who often allow longer terms of payment (between 90 to 120 days).
- In terms of regulations, producers seeking to export to Chile need to take into account that to enter Chile, all edible products must be approved by the Chilean health authorities and receive a registration number, as well as sales permit before entering the market. The regulations prohibit adulterated foods as well as those labeled incorrectly. Since 2016, the [nutritional labeling law](#) defines limits of sugar, saturated fats, calories and sodium ingredients which have to be indicated clearly on packaging. Imported products either have to carry the label or to be repackaged in Chile. All labels must be in Spanish.

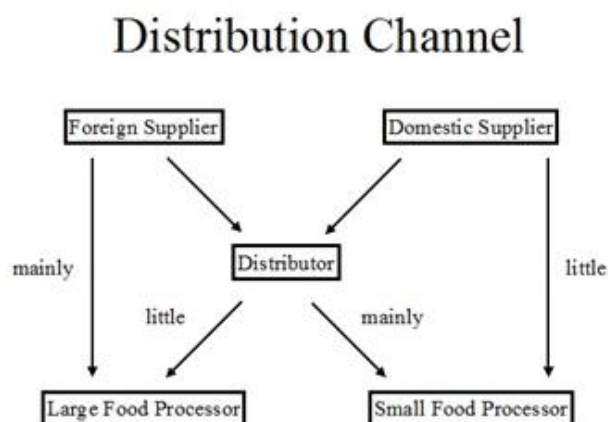
B) IMPORT PROCEDURE

FAS/Santiago recommended that U.S. exporters verify relevant import requirements with their foreign customers, who normally have the most updated information on local requirements, prior to export. Final import approval of any product is subject to the importing country's rules and regulations as interpreted by border officials at the time of product entry.

For details on how to export to Chile please refer to FAS Santiago's [Exporter Guide report](#), [FAIRS Export Certificate report](#) and [FAIRS Country report](#).

C) MARKET STRUCTURE

Graph 2: Food Processing Ingredients Distribution Channel



The distribution flow varies depending on the origin of ingredients, as well as on the size of the food processor. Local inputs are mostly sourced directly from the producer, whereas foreign products are more commonly purchased from distributors.

Large food processors are able to import directly due to volume and expertise. Small companies that produce processed foods, however, will often depend on an intermediary such as a distributor to receive the necessary foreign ingredients. Larger companies either buy directly from producers or from distributors and pay strong attention to the quality of the products.

Food processors sell their products nationally or internationally. Some big international companies use their production plants in Chile to serve other markets in Latin America. National food production companies mainly sell to grocery retailers such as supermarkets and hypermarkets (60 percent of all processed food). A smaller share of packaged food is sold through traditional grocery retailers such as independent small grocers or food/drink specialists (38.4 percent). In 2017, less than 2 percent of processed food was sold through internet retailing. For more details on the retail sector, please refer to [Chile: Retail Foods Report](#).

D) MAIN COMPANY PROFILES & COMPANY PRODUCTS

Table 1. Top Food & Beverage Companies in Chile

Company	Product Type	End Use Channels	Production Location	Procurement Channels (Direct, Importers, Distributors)
Agrosuper S.A.	Chicken, pork, turkey, salmon and processed foods (Brands: Super Pollo, Super Cerdo, Super Salmon, La Crianza, Sopraval)	Retail	Chile	Own Production, importers of animal feed and corn
Nestlé Chile S.A.	Coffee, breakfast cereals, chocolates, cookies, dairy products, pet food, ice cream, infant formula, etc.	Retail & HRI	Chile	Own Production + Suppliers (national and international) of Ingredients
Empresas Carozzi S.A.	Pasta, confectionary, sauces, tomato paste, dessert, fruit pulp, flour, beverages, animal feed	Retail & HRI	Chile, Peru	Own Production + Suppliers (national and international) of Ingredients
Viña Concha y Toro S.A.	Production, distribution and exportation of Chilean wines	Retail & HRI	Chile	Own production and direct purchase from producers
Conservera Pentzke S.A.	Canned fruits and vegetables and puree fruits	Retail & HRI	Chile	Own production and direct purchase from producers
Compañía Cervecerías Unidas S.A. (CCU)	Production and distribution of beer, soft drinks (including fruit nectars) and mineral water in Chile.	Retail & HRI	Chile, Argentina	National and international suppliers
Watt's Alimentos S.A.	Fruit (including juices, nectar, jam); dairy products (creams, cheeses, yoghurts, ...); Oilseed products (Oil, margarines); frozen fruit and vegetables; fresh pasta; wine	Retail & HRI	Chile and Peru	National and international suppliers
Soprole S.A.	Dairy products	Retail & HRI	Chile	National dairy farmers and suppliers of raw materials (national and international)
Embotelladora Andina S.A.	Production and distribution of bottled fruit drinks, mineral water and carbonated beverages, including Coca-Cola products. The company also manufactures processed fruit and plastic bottles.	Retail & HRI	Chile, Brazil and Argentina	National suppliers
Colun Ltda.	Dairy products	Retail & HRI	Chile	Own production

Source: Based in companies interviews.

E) SECTOR TRENDS

The demand for U.S. “consumer-oriented” agricultural products in Chile has increased together with income. U.S. exports of agricultural & related products reached \$1 billion in 2017, which represents a 15percent increase over 2016 and records the highest level of exports ever. Additionally, Chile regained its position as South America's largest market for "consumer-oriented" agricultural products reaching \$676 MM. The top U.S. exports of agricultural and related products to Chile are beer, poultry, feed (corn gluten meal), pork and dairy products.

The Chilean Ministry of Health published an extensive study about the eating habits of the population in 2014. The study revealed that Chileans have up to seven meals a day, in addition to breakfast, lunch and dinner. These include snacks between meals called “*colaciones*” and possibly “*la once*”, a small, light meal before dinner. The most popular foods are bread, meat, vegetables, and fruits. Overall, eating habits are moving towards poultry and pork consumption instead of beef, with increased consumption of dairy products and olive oil. For the wealthier population, vegetable protein is often substituted with meat protein, leading to an overall decrease in the consumption of vegetable protein.

Various macro-economic factors drive demand for processed foods, including a larger working population, higher disposable incomes, an increased number of families in which both parents work. Key demand sectors are ready-made foods as well as healthy foods which are products that contain natural ingredients, low cholesterol foods, fat free foods and low salt/sodium and low/no sugar products.

Demand for healthier products is growing with particular regard to value-added products. Increased awareness of the health aspects of food has made consumers more selective about their food choices. Millennials are a key part of this driver as they have a stronger awareness of health issues and are more likely to act upon this in their food choices, especially as they start to enter the labor market.

A rising awareness of health issues can be attributed to various factors, including: government initiatives, such as the 2016 nutritional labeling laws for food products, educational campaigns regarding food, as well as global nutritional trends such as super-foods. Certain Government campaigns, such as “[Elige Vivir Sano](#)” (Choose to Live Healthy) and “[El Plato de tu Vida](#)” (The Plate of your Life), aim to reduce obesity and heart disease in the Chilean population.

According to FAS Santiago contacts, a healthy eating trend is noticeable through rising demand for products with perceived health benefits. This is also evident in the use of new ingredients in the production of healthier products, and products especially those adapted to consumers with food intolerances, such as lactose and gluten free products. Alongside this health trend there is a rising demand for organic foods. For more information on healthy food products see [Chilean Demand of Healthy Food Products Continues to Grow](#) report.

There are three main reasons for Chilean companies to import food ingredients: (1) If the products are not available domestically through local production such as cereals, cocoa and sugar; (2) if it is cheaper to import rather than buy domestically; or (3) if imported products offer a higher quality than those available in the domestic market.

SECTION III. COMPETITION

There are significant opportunities for imported, value-added food products and raw materials in Chile due to shifting consumer preferences. The main competitors for U.S. food ingredients are: MERCOSUR, China and the European Union (EU). All three have free trade agreements with Chile.

The United States is Chile’s second main supplier of agricultural and food ingredients after Argentina.

Table 2. Chile Food Ingredients Imports from the World

Partner Country	Value in Thousands of U.S. Dollars	
	2016	2017
World	931,708,055	974,269,771
Argentina	204,653,383	195,871,429
United States	138,699,607	161,631,819
Brazil	118,167,164	116,888,015
China	75,437,495	89,133,458
Colombia	30,245,333	54,818,429
Guatemala	69,757,243	52,119,023

Table 3. Chile’s Food Ingredient Imports from the U.S.

Description	Value in Thousands of U. S. Dollars	
	2016	2017
Food Preparations as Ingredients (ex.: flavoring substances)	35,881,229	38,683,423
Non-Fat Dry Milk	15,395,612	25,550,890
Protein Concentrates and Textured Protein Substances	23,361,051	18,010,682
Fresh or Dried Bitter Almonds (shelled)	16,482,071	16,608,534

Germany	26,945,590	27,695,502
Netherlands	28,106,717	24,987,989
Peru	15,621,557	22,358,752
Malaysia	19,265,604	21,579,834
Spain	18,681,015	20,574,359
France	23,126,608	18,444,078
Other	163,000,739	222,985,513
Source of Data: Chile Customs Office		

Mixtures of Odoriferous Substances and Mixtures	9,813,610	11,505,798
Fixed Vegetable Fats and Oils	39,718	6,065,147
Sucralose	3,570,235	5,675,652
Lactobacillus	1,120,759	5,197,339
Sauces and Preparations (Mixed Condiments)	3,333,301	3,927,920
Dextrins and other Modified Starches	2,651,650	3,205,286
Modified Natural Polymers (ex.: Alginic Acid)	4,479,450	3,118,869
Whey, including modified whey	1,264,087	2,981,120
Lactose in Solid Form and Lactose Syrup	2,007,902	2,967,605
Concentrated Milk Proteins with a Protein Content	4,234,635	2,938,463
Enzymes and Prepared Enzymes	2,046,637	2,774,177
Margarine; Edible Mixtures and Vegetable Fat & Oil	1,404,475	2,164,769
Mango Chutney, Liquid	2,319,502	1,967,006
Others Food Ingredients	9,293,683	8,289,139
Total Food Ingredients	138,699,607	161,631,819

Source of Data: Chile Customs Office

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Healthy foods are a category of products that show huge potential for growth in the Chilean market, there is increasing concern for health issues among consumers and food processing companies that are trying to adapt to health regulations and consumers' demand. Another category of products with high growth potential is gourmet food and beverages including premium brands, exclusive products, and high value added processed foods.

Chile is highly competitive and price sensitive market for many items. Prospective U.S. exporters should look at Chile as a long term market and be persistent. U.S. exporters should be sensitive in brand positioning and be prepared for sufficient marketing activities including advertising.

A) PRODUCTS PRESENT IN THE MARKET WHICH HAVE GOOD SALES POTENTIAL

Processed Food Products	Food Ingredients
Functional Foods (ex.: energy bars)	Natural Flavors
Spreads	Sweeteners and Natural Alternatives
Free from Products (ex.: lactose-free dairy products, gluten free products)	Pork Meat (ex.: for Chilean sausage industry)
Dried Fruit & Fruit Snacks	Non-Fat Dry Milk
Vegetable and Bread Snacks	Coconut
Creative Condiments (ex.: tahini, ghee, date syrup)	Oats
Ready to Drink Coffee and Tea	Protein Concentrate
Premium and Healthy Juices (ex.: aloe vera, coconut water, etc.)	Odoriferous Substances
Sport and Energy Drinks	Alternative Grains (ex.: quinoa, lentils, chickpeas)
Light Alcoholic Drinks (ex.: cider, sparkling wines and lager brands)	Super Foods (chia, flaxseeds, nutritional yeast, etc.)
Beer	Almonds
	Whey and Lactose
	Others: Additives, Preservatives, Thickeners, Oats, Vegetable Fats and Oils, Mixed Condiments, Starches, Enzymes

B) PRODUCTS NOT PRESENT IN MARKET BUT WHICH HAVE GOOD SALES POTENTIAL

In Chile, naturally healthy products are strongly promoted, further emphasizing this trend. Product variety in this niche market is expected to increase as naturally healthy products continue to enter the Chilean mass market over the coming years.

Natural Healthy Products: In Chile, naturally healthy products without artificial ingredients are strongly promoted, further emphasizing this trend. Product variety in this niche is expected to increase as naturally healthy products continue to enter the Chilean mass market over the coming years.

Ready Meals: Moreover, ready meals are still only a niche regarding value and volume, but lifestyle trends as well as economic forecasts show great potential for these products. In particular, healthy prepared foods with few preservatives, additives and other specialized food ingredients have good sales potential. The target customer for these products is often young people with a work schedule and little time. Moreover, these products are attractive to people living on their own or with little cooking experience.

Premium Cheese: High quality cheeses are becoming increasingly popular and widespread in Chile, which is reflected in developments of imports over the past years. Cheese imports from Argentina and New Zealand have dropped whereas imports from the European Union (France, Germany and Netherlands) have increased.

Craft Beer: Craft beer in Chile accounted for only 1.5 percent of the overall segment of beer in 2017, but its popularity is increasing. Starting off amongst beer enthusiasts, the trend is spreading to the middle-and upper-income households in Chile, as well as food service establishments in affluent parts of cities. The leading Chilean craft beer brand is Kross, however, imported beers are very popular in Chile.

C) PRODUCT NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS

Products do not face significant trade barriers to enter the Chilean market. On the contrary, the high number of Free Trade Agreements (26) make it one of the most open economies in which products from all over everywhere in the world are offered. Import tariffs are not considered an import barrier. For specific information on import procedures and requirements please refer to Chile's [Exporter Guide report](#).

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to Chile, please contact the Foreign Agricultural Service (FAS) in Santiago. U.S. companies seeking to export goods to Chile are advised to do thorough research for a good understanding of the market. FAS GAIN Reports are a good source of country specific information: <http://gain.fas.usda.gov>

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Main Food Show in Chile:

Name: Espacio Food & Service
Content: The most important food industry event in Chile
Date: September, 25-27, 2018 (annual)
LocationPlace: Espacio Riesco, Santiago de Chile
www.espaciofoodservice.cl