

Chile ICT - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Chile ICT Market Analysis

The Chile ICT market was valued at USD 17.78 billion in 2025 and estimated to grow from USD 19.27 billion in 2026 to reach USD 28.79 billion by 2031, at a CAGR of 8.36% during the forecast period (2026-2031). The growth momentum keeps the Chile ICT market at the forefront of Latin America's digital transition as the Chile Digital 2035 program aligns public funding with private megaprojects. Hyperscalers' commitments—Amazon's USD 4 billion cloud region and Google's new trans-Pacific cable-signal confidence in resilient infrastructure, while the National Data Centers Plan targets a further USD 2.5 billion influx. Renewable power exceeding 80% by 2030, 147% mobile penetration, and 91% household internet access underpin sustained service uptake. Yet peso volatility, a 6,000-person talent shortfall, and rising cybersecurity risks create cost pressure and execution risk even as 75%-84% of surveyed firms report positive AI returns.

Chile ICT Market Trends and Insights

Government "Chile Digital 2035" Implementation Accelerating ICT Spend

Chile increased its 2025 digital budget by 64%, aiming for 95% of public services online by year-end, which opens procurement pipelines for integrators and cloud vendors. The National Data Centers Plan's USD 2.5 billion target encourages joint financing, while AI R&D grants of up to USD 7 million attract leading chipmakers and model developers. Expanded CORFO vouchers now subsidize SME automation, addressing a gap where only 20% of firms use electronic invoicing. These moves anchor the Chile ICT

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market in long-cycle public-private partnerships that cushion currency swings.

Fixed and Mobile Broadband Leadership Sustains Demand

Nearly two-thirds of fixed subscriptions are now fiber, and Chile's 5G coverage is on track to hit 90% in 2025, underpinning robust digital consumption. Entel alone earmarked USD 618 million for 2024 upgrades, while neutral-host newcomer On*Net lowers entry costs for ISPs. Higher network quality feeds a feedback loop of streaming, fintech, and IoT uptake that lifts average revenue per user and secures funding for further roll-outs. As a result, the Chile ICT market captures premium service spend even when macro headwinds squeeze disposable income.

Peso Volatility and GDP Headwinds Squeeze ICT Budgets

Chile's medium-term GDP outlook of 2.2% trails regional peers, and peso swings complicate multiyear IT contracts. Fiscal consolidation targets have delayed some ministry projects, while SMEs often defer upgrades when imported hardware costs spike. The Chile ICT market remains cushioned by annuity-style cloud subscriptions denominated in USD, yet discretionary spending on devices and bespoke software shows sensitivity to exchange-rate shocks.

Other drivers and restraints analyzed in the detailed report include:

Cloud and Hyperscale Data-Center Build-Out Lifts Capex
5G and Fiber Rollout Expands High-Value Services
Acute Digital-Talent Shortage Inflates Wages and Lead Times

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Communication Services retained a 39.75% slice of the Chile ICT market in 2025, supported by unmatched mobile and fiber penetration. Growth moderates as saturation sets in, yet recurring revenue streams finance 5G upgrades that enable value-added edge analytics. IT Security/Cybersecurity, helped by the 2025 Framework Law, races ahead at a 12.63% CAGR as boards approve standalone budgets and insurers impose compliance clauses.

The IT Services branch benefits from managed service contracts among SMEs lacking in-house admins. Hardware vendors face shrinking margins as enterprises pivot from servers to cloud, while the data-center build-out keeps demand alive for high-density racks. As service portfolios evolve, end-to-end security orchestration becomes a differentiator inside the Chile ICT market.

Large Enterprises commanded 59.65% of spending in 2025, anchored by banks, retailers, and miners with decade-long digital roadmaps. They are early adopters of AI-infused ERPs and multi-cloud governance tools that drive cross-domain revenue. SMEs, however, post the quickest 9.96% CAGR thanks to subsidies and simplified SaaS packages that bypass capex barriers.

Government vouchers and Microsoft's Desafio Startups credits reduce onboarding friction, while managed security services plug expertise gaps. As fiber reaches secondary cities, more SMEs migrate point-of-sale and payroll to the cloud, expanding the Chile ICT market's long-tail revenue pool even as credit constraints persist.

Chile ICT Market Report is Segmented by Type (IT Hardware [Computer Hardware, and More], IT Software, IT Services [Managed Service, and More], IT Infrastructure, and More), End-User Enterprise Size (Small and Medium Enterprise, Large Enterprises), End-User Industry (BFSI, IT and Telecom, and More), and Deployment Mode (On-Premise, Cloud). The Market Forecasts are Provided in Terms of Value (USD).

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List of Companies Covered in this Report:

AWS Chile (Amazon.com Inc.) Microsoft Corporation Google Cloud (Alphabet Inc.) International Business Machines Corporation Oracle Corporation SAP SE Cisco Systems Inc. Huawei Technologies Co. Ltd. Hewlett Packard Enterprise Company Kyndryl Holdings Inc. Palo Alto Networks Inc. Check Point Software Technologies Ltd. Verizon Communications Inc. Entel S.A. Telefonica Chile S.A. (Movistar) Claro Chile S.A. Sonda S.A. Logicalis Group Ltd. TD SYNEX Corporation Coasin Chile S.A.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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