



OFICINA
REGIONAL DE
ATRACCIÓN DE
INVERSIONES
O'HIGGINS

Investment Opportunities in O'Higgins Region

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Main economic activity in the O'Higgins Region

Taking as a starting point the economic sectors that drive the O'Higgins region in terms of economic contribution: agriculture, mining, construction, services, and manufacturing, the discussion focuses on identifying areas and opportunities with the greatest potential for attracting investment to the region.

AGROINDUSTRY

This sector is fundamental to the regional economy, notable for its fruit production, accounting for **more than 40% of Chile's fresh fruit exports**. In 2023, it **reached 1.299 billion**, representing **16% of the regional GDP**.

PERSONAL SERVICES

It is the most important type of service and the **second most influential economic activity** in terms of regional GDP in 2023, reaching **1.204 billion**, representing **14.8% of the region's GDP**. It plays a very significant role in the economy.

MINING

The **El Teniente mine**, operated by Codelco, is a key asset for this sector in the region. It contributed **10.9% of regional GDP** in 2023, reaching 884 billion (only 3% of the mining company's associated turnover is due to local suppliers).

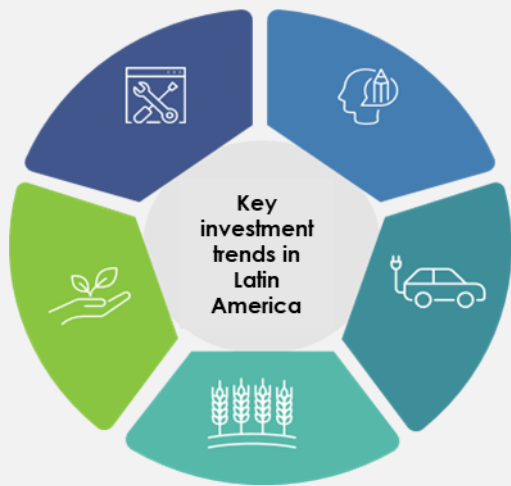
MANUFACTURING INDUSTRY

It focuses mainly on **fruit processing, white meat, copper mining, and the wine industry**. In 2019, there were **4,544 companies dedicated to the sector**. It contributed **10.2% of the regional GDP, generating 826 billion**.

CONSTRUCTION

It is an **engine of growth and job creation** in the region. Projects such as the region's first fully industrialized housing complex were completed in January 2024. In 2023, it accounted for **6% of GDP, producing 539 billion**.

Key investment trends in Latin America



NEARSHORING AND RELOCATION OF PRODUCTION CHAINS

Global companies are looking to relocate part of their supply chains to reduce logistics costs and increase resilience. Latin America is positioning itself as an alternative destination for manufacturing and assembly, especially in countries with broad trade agreements and a skilled workforce.

Chile has **competitive advantages in precision manufacturing, advanced agribusiness, and technological products linked to mining, energy, and food services.**

ENERGY TRANSITION AND GREEN ECONOMY

Investment in **renewable energy** is the main driver of FDI in the region. In 2022, 56% of new project announcements in Latin America were in the energy sector, with strong momentum in solar, wind and green hydrogen projects.

Chile leads the way in attracting investment in this sector thanks to its regulatory framework, political stability and natural resources. It is particularly competitive in **green hydrogen and large-scale solar and wind farms.**

DIGITALIZATION AND KNOWLEDGE-BASED SERVICES

Investment is growing in **data centers, digital platforms, cybersecurity and technologies applied to health, education and industry.** Latin America is beginning to attract FDI in these sectors due to its young and digital demographic, together with improvements in connectivity.

Chile stands out as a recipient of this type of investment, with data centers from companies such as Google and Microsoft, and digital hubs in Santiago, Valparaíso and Concepción. The O'Higgins Region offers ideal conditions due to its proximity to the capital, low cost and good digital infrastructure.

SUSTAINABLE AGRO-INDUSTRY AND FOOD SECURITY

There is growing interest in investments that ensure sustainable food production, with technologies that reduce water and energy use and promote international certifications. Latin America, as an agricultural powerhouse, leads the way in opportunities for precision agriculture and agro-industrial transformation. In the case of Chile, and in regions such as O'Higgins, opportunities can be seen in **smart agro-industry, premium crops, and value-added processing.**

SUSTAINABLE INFRASTRUCTURE AND GREEN LOGISTICS

Investments in climate-resilient infrastructure are prioritized: **green logistics, electric mobility, water treatment, and circular solutions.** PPP (public-private partnership) initiatives are becoming established as key mechanisms for financing large projects. In the case of Chile, there are opportunities in urban and **industrial electromobility, industrial and domestic waste treatment, and multimodal logistics projects** that integrate productive valleys with ports and consumption centers.

Alignment of opportunities with the Regional Development Strategy 2024-2026

A critical point to address will be the **consistency between the investment attraction strategy** (with its priority sectors around which to leverage investment) **and the target image of the region that it aspires to achieve within the framework of the Regional Development Strategy 2024-2036**. This aspect will be fundamental to articulating coherent and effective governance that involves and coordinates the various regional actors.

STRUCTURAL AXES OF REGIONAL ACTION 2024-2036

1- Water Scarcity and Management	6- Violence
2- Disputes over Land Use	7- Impacts of Immigration
3- Impacts of Agribusiness	8- Productive Matrix, Enclaves and Rural Lifestyle
4- Distribution of opportunities across territories	9- Education, Employment and Viability of Youth Life Projects (Innovation and Entrepreneurship)
5- Coastal Zone: Visibility, Management, and Policy	10- Culture, Identities and Urbanity

OBJECTIVE OF THE O'HIGGINS REGION 2024-2036

The O'Higgins region will consolidate its position as a benchmark for **sustainable development**, prioritizing the revitalization of natural resources and adaptation to climate change. It will guarantee **social welfare** and personal safety through accessible services, modern infrastructure and connectivity, supported by **inclusive, equitable and open management for citizens**. It will promote a diversified productive matrix, with clusters in emerging areas such as tourism and advanced agriculture, driven by technical education and constantly developing human talent. It will value cultural heritage, strengthen family farming and promote decentralization through public-private partnerships, integrating gender equality and nature-based solutions to address environmental and productive challenges.

Map of Investment Opportunities



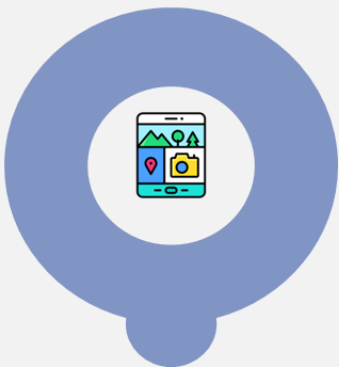
SPECIALISED AND DIGITAL SERVICES

The O'Higgins Region offers exceptional conditions for investment in **advanced technological solutions serving key productive sectors such as agriculture, energy, and connectivity.**



VALUE-ADDED MANUFACTURING

The region represents a privileged platform for the **industrial processing of raw materials with a focus on sustainability, efficiency, and production sophistication.** It is especially geared towards its industrial sectors with the greatest economic contribution: **agribusiness and mining.**



SPECIAL INTEREST TOURISM

As an emerging destination, the O'Higgins region offers a **wide range of unique, high-value tourist experiences,** leveraging its **natural environment** and **long-established wine industry.**

SPECIFIC INVESTMENT OPPORTUNITIES		SECTORS	KEY AREAS OF INVESTMENT
01	Diversification of the energy generation matrix	▪ Renewable Energy	SPECIALISED AND DIGITAL SERVICES
02	Development of the Electromobility Industry	▪ Electromobility	
03	Data Center Implementation	▪ Data Centers	
04	Agrovoltaic Production (Agri-PV)	▪ Advanced agro-industry	VALUE-ADDED MANUFACTURING
05	Smart Agribusiness		
06	New value-added crops	▪ Food security	
07	Copper tailings from mining and associated services	▪ Low-impact mining	
08	Waste management and reuse	▪ Circular economy	
09	Development of the tourism industry	▪ Tourist experiences	SPECIAL INTEREST TOURISM
10	Hotel infrastructure and accommodation	▪ Real estate investment	



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Investment OPPORTUNITY sheets





Specialised and Digital Services

Opt.

1

DIVERSIFICATION OF THE ENERGY MATRIX

RENEWABLE ENERGY SECTOR



Diversification of the energy matrix involves incorporating various renewable energy sources to **reduce dependence on fossil fuels, improve energy security, and contribute to climate change mitigation.**

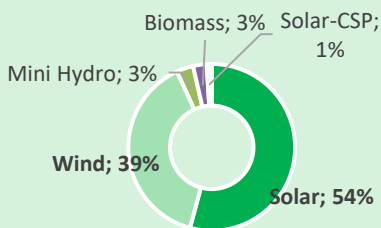
In the O'Higgins Region, this diversification is geared towards the **use of solar, wind, biomass and geothermal resources**, in line with the national goals of carbon neutrality by 2050.



■ NCRE capacity in Chile:

16.804 MW

Net installed NCRE capacity in Chile in 2025
(48 % of the total)

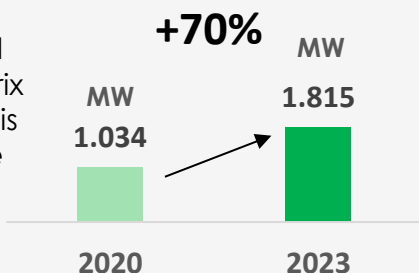


■ Renewable energy generation in O'Higgins:

Significant increase in the **total capacity injected by the O'Higgins region** into the national total **(6% in 2020)**

84%

of regional energy matrix generation is **renewable (2023)**



581MW of installed renewable energy capacity in O'Higgins (2024)

25 NCRE projects

Under environmental assessment (2025). Leading region in Chile

Chile aspires to a reliable, sustainable, inclusive and competitive energy future. It has set a target for **renewable energies to account for at least 70% of electricity generation by 2050** (60% by 2035). The evolution of non-conventional renewable energy (NCRE) generation is remarkable at the international level (in 2023, the effective contribution of NCRE in Chile was three times higher than that required by law, according to CNE data).

One of the main challenges facing the country is the **spillage of renewable energy** (more than 5,500 GWh), mainly due to the **concentration of plants and lack of infrastructure.**

O'Higgins, a key player in attracting investment:

- **Leadership in number of projects in 2025** (with 25 initiatives vs. 22 in Valparaíso. High dynamism and number of small proposals. PGMDs decongest and improve voltage quality).
- **Total investment vs. number of projects** (exponential increase in installed capacity and strong growth projections).
- **Diversification and geothermal potential:** The granting of new geothermal exploration licenses indicates interest in diversification and attracting investment.



The O'Higgins Region stands out for its **large number of NCRE projects in process and in operation**, especially SDGFs, and for its already high proportion of **renewable generation**, which positions it as a **key region for the growth of clean energy in Chile**, particularly for investments in **distributed and smaller-scale projects**, as well as new **geothermal explorations.**

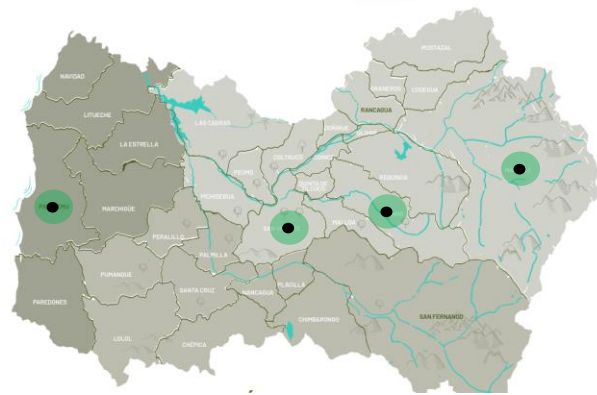


Specialised and Digital Services

KEY LOCATIONS

Solar energy is present in inland and dry areas, wind energy on the coast, biomass in agricultural areas, and geothermal energy in mountainous areas. The municipalities with the greatest potential include:

- **San Vicente de Tagua** (Solar)
- **Pichilemu** (Wind)
- **Rengo** (Biomass)
- **Machalí** (Geothermal)



SUPPORT ECOSYSTEM

- This ecosystem, composed of **government institutions and an active business network**, creates a favorable **environment to invest in diversification projects**.
- The Regional Government (GORE), as the body responsible for territorial planning and the allocation of resources for strategic projects, has the power to **promote and manage renewable energy initiatives**.
- In the private sector, the region is home to **medium-sized and large companies that can act as suppliers, contractors or strategic partners** in renewable energy projects.
- CGE and Enel Chile in the distribution and generation of electricity, provide a solid infrastructure for the integration of new projects.



INVESTOR PROFILES



- Energy infrastructure investment funds



- Multinational companies in the energy/renewable sector



- Global technology and EPC (Engineering, Procurement and Construction) providers



- Consolidated Chilean energy companies



- Local agro-industries with surpluses



- Regional technology and mining companies



- Electricity cooperatives and trade associations

RECOMMENDATIONS

- **Commit to diversified and scalable projects:** The region offers optimal conditions for developing solar, wind, biomass and geothermal initiatives, allowing for the creation of resilient energy portfolios adapted to different territories.
- **Establish public-private partnerships:** The regional ecosystem actively promotes investment through the GORE, technical support programs, and municipalities with experience in energy project management.
- **Investing in early stages with high expansion potential:** The existence of operational infrastructure and a favorable regulatory framework make it possible to reduce risks and scale projects efficiently.
- **Explore complementary value-added solutions:** There are opportunities in energy storage, green hydrogen production, and O&M services that enhance project profitability.
- **Take advantage of regulatory and financial incentives:** Chile offers regulatory stability, clear carbon targets, and access to green financing, key factors in enabling sustainable investments.



Specialised and Digital Services

Opt. 2

DEVELOPMENT OF THE ELECTROMOBILITY INDUSTRY

ELECTRO MOBILITY SECTOR

Electromobility refers to any vehicle that uses alternative fuel and/or energy powered by one or more electric motors. This technology includes **100% electric battery vehicles and hybrids that combine electricity with fuel cells**. It is presented as a key solution for **reducing CO2 emissions and noise pollution**, improving energy efficiency. It has become a global priority because the transport sector generates 24% of the planet's total CO2 emissions. The electromobility industry encompasses a complex value chain that includes various sectors and activities.



Global outlook for a booming sector:

Chile's strategic positioning with **52%** of the world's **lithium** reserves

Massive increase in global demand **581M EVs** worldwide by 2035 (projection vs. 18 million in 2024)

Decrease in battery costs **100 USD/kWh** Battery cost for 2030 (projection vs. 156 USD/kWh in 2019)

Sectors in which O'Higgins could apply electromobility solutions:

High-potential hub for the **development and application** of electromobility



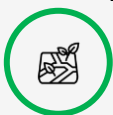
Mining



Public Transport



Agricultural



Sustainable Tourism



Logistics and Distribution

Chile has positioned itself as a leader in Latin America in the adoption of electromobility, and 2025 is expected to be a crucial year for the consolidation of this trend. In addition to the advantages and investment appeal of the sector at the national level (renewable energy matrix, availability of lithium reserves), **the O'Higgins Region has key characteristics that enable this territory to lead a hub for the electromobility industry in Chile.**

- **Reborn Electric Motors as a key asset (Rancagua):** manufactures new electric buses and converts diesel fleets with innovative solutions based on the circular economy, at costs up to 45% lower than new vehicles.
- **Solid energy matrix and infrastructure:** 84% renewable generation and >USD 2.2 billion in solar and wind projects and an expanding charging infrastructure thanks to the O'Higgins Green Corridor (Porsche and Copec Voltex).
- **Public initiatives and human capital:** The 'Mi Colectivo Eléctrico' program (+\$3.5 billion from the Regional Government) promotes technological renewal, while institutions such as the University of O'Higgins and Pro O'Higgins promote specialized technical training and early links with companies in the sector.



The convergence of an **innovative local industry**, a **solid renewable energy matrix**, **supportive public policies**, and **growing human capital development**, together with the **specific needs of its key productive sectors**, positions the O'Higgins Region as a hub with high potential for the development and application of electromobility in Chile.



Specialised and Digital Services

KEY LOCATIONS

The following municipalities stand out as potential strategic hubs:

Industrial and R&D center for electromobility and connection with the mining sector:

- **Rancagua**

Areas with high growth potential in the tourism and agricultural sectors:

- **Valle de Colchagua**
- **Pichilemu**
- **Matanzas**



SUPPORT ECOSYSTEM

Public and government institutions

- O'Higgins Regional Government (GORE)
- Regional Ministerial Secretariat for Energy (SEREMI)
- Energy Sustainability Agency (AgenciaSE)
- **Local municipalities**

Business fabric and local capabilities

- The region is home to **companies that can play key roles in the electromobility value chain**. In addition to **Reborn Electric**, which is driving the sector in the region, there are other **large companies** with assimilation capacity and **connections to the value chain** (workshops, automotive maintenance, capital goods, etc.).



Agencia de
Sostenibilidad
Energética



INVESTOR PROFILES



- **Electric vehicle manufacturers**



- **Charging infrastructure providers**



- **Transport and logistics companies**



- **Technology companies and start-ups**



- **Local cooperatives and associations**

RECOMMENDATIONS

- **Take advantage of Chile's strategic position in lithium:** 52% of the world's reserves are in the country, making it a key player in attracting investment in battery manufacturing and electric vehicles.
- **Invest in industrial hubs with local capabilities:** O'Higgins has companies that are already part of the electromobility value chain, which facilitates the installation of suppliers, assemblers, and specialized workshops.
- **Promote solutions in key productive sectors:** The region offers high applicability in mining, public transport, logistics, agribusiness, and distribution, opening up business opportunities for different investor profiles.
- **Develop innovation and technical training centers:** The region's technical and industrial capabilities allow for progress towards local manufacturing, electric fleet maintenance and the development of new solutions.
- **Align projects with public policies and green financing:** The regional ecosystem supports the energy transition with incentives, enabling infrastructure and inter-institutional coordination.



Specialised and Digital Services

Opt. 3

DATA CENTER IMPLEMENTATION

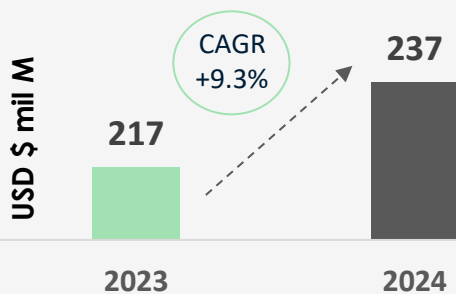
DATA CENTERS SECTOR

A **data center** is a physical facility designed to house and operate servers, storage systems, networks and the distribution of large amounts of data.

These infrastructures are **essential to ensure the continuous operation of all kinds of digital services**, and support key emerging technologies such as **Artificial Intelligence**, which require fast and massive data processing.



ICT market growth in Latin America



Participation in ICT services in Latin America



Overview of the sector in Chile

193 MW

Installed in 2023

+ 228 MW

Additional in development

+451%

Capacity growth vs. 2013

US \$4 mil M

Planned PP investment



The regional context is highly favorable for the **expansion of technological infrastructure**, given the exponential growth of the Information Technology (IT) sector in the Americas.

IT and software services are **expanding at a much faster rate**, reflecting strong demand for modern digital infrastructure, such as data centers.

Chile as a technological leader in the region:

- **Connectivity** (62,000 km of terrestrial fiber optic cable, 3.8 million 5G devices and 69,000 km of submarine cables).
- **Growth of the local sector** (exponential increase in installed capacity and strong growth projections).
- **Favorable political and economic environment:** National Data Center Plan (PDATA), with investment and regulatory, fiscal and environmental incentives to promote installation.



O'Higgins is positioning itself as a **highly competitive location for the installation of data centers** that provide services nationally and internationally, taking advantage of its connectivity, stability and lower operating costs than Santiago.

Located 87 km south of Santiago, it represents a **strategic alternative for decentralizing and expanding data center capacity outside the Metropolitan Region.**

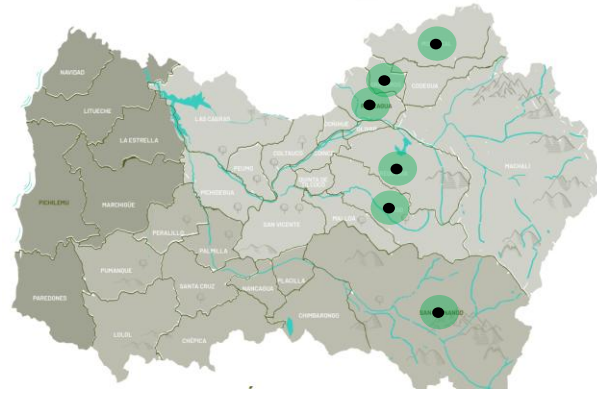


Specialised and Digital Services

KEY LOCATIONS

Due to their **proximity to Santiago, availability of land, access to robust electrical networks, and high-capacity fiber optics**, these are the six optimal nodes that provide access to the national backbone network.

- Mostazal
- Graneros
- Rancagua
- Requínoa
- Rengo
- San Fernando



SUPPORT ECOSYSTEM

- In Chile, the technology and services sector is supported by a **diverse network of institutions**. Key organizations drive improvements in public policy, while government agencies provide access to financing and incentives. In addition, collaborative programs such as StartupChile encourage the attraction of global talent and its connection to the local ecosystem.
- **Large-scale hosting companies and leading cloud service** providers are choosing to set up their data centers in Chile, motivated by an attractive proposition that allows them to expand into other markets in the region.



INVESTOR PROFILES



- **Large technology companies** in Santiago with a need to store large amounts of data and information



- **Government entities and investment funds** with an interest in public-private partnerships

RECOMMENDATIONS

- **Consider public-private partnerships:** The Chilean government actively promotes this industry, with the aim of accelerating investment of 2.5 billion dollars and has established a multi-stakeholder committee to coordinate efforts between the state, the private sector, and civil society.
- **Addressing high water and energy consumption:** Data centers are known for their significant water and energy footprint, especially for cooling purposes. To mitigate water stress, solutions such as seawater desalination or the reuse of treated wastewater for cooling systems should be considered.
- **Taking advantage of investment incentives and a favorable regulatory environment:** Various incentives are available for companies, including VAT exemptions for the export of services (including data storage and processing), tax discounts for training expenses through SENCE, and tax incentives for Research and Development (R&D), as well as a 35% tax credit on first-category tax for R&D activities certified by CORFO.



Value-Added Manufacturing

Opt. 4

AGROVOLTAIC PRODUCTION

ADVANCED AGRICULTURAL INDUSTRY SECTOR



Agrovoltaic production (Agri-PV) is an **innovative technology that integrates photovoltaic solar energy generation with agricultural activity** on the same land, allowing for dual use of the soil. The main objective is to create a favorable microclimate that protects intensive crops and fruit trees, resulting in **greater water efficiency, higher soil moisture and a potential reduction in irrigation water consumption.**



- Chile hosts **LATAM's first commercial Agri-PV project in Rancagua** ('Ayla Solar' by O'Energy):

USD 12M
investment

9 MWP
capacity

- Pioneering institutions** in Agri-PV research:



O'Higgins University



Chile University



Fraunhofer Chile Research

- Agri-PV impact figures** in Chile:



+187%

Efficient use of
land



10,6%

Energy savings in
cherry cultivation



+29%

Moisture in crop soil



13,4 GWp

Theoretical
potential of
blueberry orchards

Agrovoltaic production (Agri-PV) is emerging as a high-potential technological solution to the global challenges of food security, energy transition and climate change. Internationally, this technology has attracted the interest of investors, governments and agricultural companies by offering multifunctional benefits: it protects crops from extreme weather events, improves water efficiency and allows clean energy to be generated on agricultural land without compromising its productive use.

The O'Higgins Region has clear comparative advantages to lead this industry at the national level:

- High **agricultural vocation**, with class 1 and 2 soils, and leadership in fruit production (cherry, walnut, and grape).
- High **climate exposure** (drought, hail, frost), which demands resilient innovation.
- Strong **pressure on land use**, given the concentration of SDGF projects.
- Pioneering local experience: **Ayla Solar** in Rancagua, and pilot projects at the University of O'Higgins.

In this context, agrovoltaics offer a dual-impact solution — energy and production — that allows the region to reconcile agricultural growth with energy transition, opening up new opportunities to attract sustainable investment.



The region's **agricultural strength**, its high **renewable energy generation** potential, and its **experience in pioneering Agri-PV** projects make O'Higgins a natural epicenter for promoting this technology. The region's **high solar irradiation of +5kWh/m2 per day** and the existence of adequate **distribution infrastructure** are differential advantages for the implementation of Agri-PV.

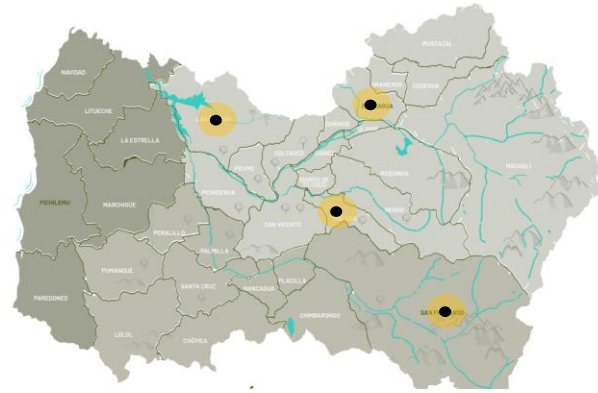


Value-Added Manufacturing

KEY LOCATIONS

The Ayla Solar project (**Rancagua**), the Quilamuta photovoltaic plant (**Las Cabras**) and areas with photovoltaic projects under development, such as the Cumbres del Sol Photovoltaic Park (**Malloa and San Fernando**), demonstrate high potential in their respective municipalities.

- **Rancagua**
- **Las Cabras**
- **Malloa**
- **San Fernando**



SUPPORT ECOSYSTEM

- Institutions such as **SEREMI Energy** and **SEREMI Agriculture** jointly coordinate initiatives aimed at integrating photovoltaic systems into agricultural properties.
- The **National Irrigation Commission (NIC)**, through Law 18,450, offers subsidies for implementing efficient irrigation technologies.
- The **Energy Sustainability Agency (ESA)** runs co-financing programs for agro-energy solutions.
- In the academic and R&D field, **INIA Rayentué** (Rengo) and the **University of O'Higgins** are promoting the development of local capabilities.
- In terms of business, the region is home to large agricultural exporters such as **Verfrut**, **Subsole**, **Agroindustria San Clemente**, and **Patagonia Fresh**.



INVESTOR PROFILES



- Foreign renewable energy investors (IPP/SDGF)



- Investment Funds and Venture Capital



- Large national agricultural exporters

RECOMMENDATIONS

- **Investing in dual agro-energy solutions:** Agrovoltatics optimize land use by combining agricultural production and energy generation, increasing the profitability and climate resilience of the territory.
- **Leverage regional leadership and pioneering projects:** O'Higgins is home to the first Agri-PV project in Latin America, a key reference for investors looking to test and scale innovative technological solutions.
- **Develop partnerships with R&D centers:** Institutions such as the University of O'Higgins, the University of Chile and Fraunhofer Chile offer technical support and innovation capacity applied to the Agri-PV model.
- **Focus investments on strategic agricultural areas:** Municipalities such as Rancagua, Malloa, San Fernando, and Las Cabras have ongoing projects, intensive crops, and high solar radiation, ideal conditions for replicating this technology.
- **Access public incentives for water and energy efficiency:** Laws and instruments such as Law 18,450 and the programs of the Energy Sustainability Agency facilitate the implementation and financing of projects.



Value-Added Manufacturing

Opt. 5

SMART AGRICULTURAL INDUSTRY

SECTOR

ADVANCED
AGRICULTURAL
INDUSTRY

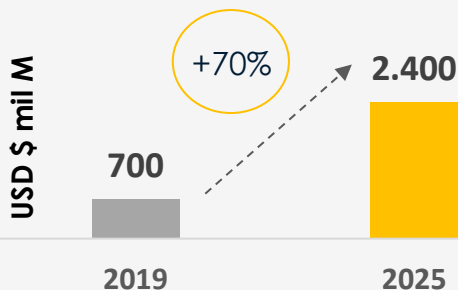


Smart agribusiness (Agtech) refers to the application of technologies and innovations aimed at improving the efficiency and sustainability of agricultural processes and their entire value chain. This integration of research, software, and hardware makes it possible to **address global challenges** such as climate change, natural resource management, and digital transformation.

The growing **scarcity of arable land and water resources**, a result of climate change, acts as a key driver for the development and adoption of these technological solutions.



- Growth in **investment in Artificial Intelligence technologies** for agriculture



- Prospecting **global market figures for agricultural technologies (2025)**

USD 27M

Market value

>10%

Annual rates

- Forecast figures for **Agtech companies (2025)**

USD 22M

Income

150%

Average annual
growth

As a leader in fresh fruit exports, Chile faces a scenario of **increasing water stress**, making it urgent to adopt technologies such as **moisture sensors, smart irrigation systems, and remote monitoring platforms**. These innovations **optimize water use and increase productivity** in a market that combines local demand, regional vision, and a commitment to sustainability.

- The **O'Higgins Region** has established itself as one of the key territories for the development of smart agribusiness in Chile. Due to its **strong agricultural activity**, together with a **growing innovation ecosystem** and a **clear focus on sustainability**, it is positioned as an attractive destination for investment in Agtech technologies.
- Projects such as the genetic identification of fruit species for nursery control, the recovery of degraded soils, and the development of crops resilient to climate change reflect a **strategic vision that seeks to structurally transform agriculture**. This commitment to productive diversification, adaptation to the environment, and knowledge generation makes O'Higgins a living laboratory for agricultural innovation.



O'Higgins is a strategic hub for Agtech development, accounting for **22.6% of the national agricultural GDP and more than 40% of formal agricultural employment**. With a strong presence of fruit, wine and processed food agro-industries, it offers ideal conditions for implementing technological solutions on an industrial scale. Its potential is particularly focused on two key areas: **water efficiency and the automation of agro-industrial processes**. In addition, it has advanced infrastructure, R&D centers, and a strong regional focus on innovation.

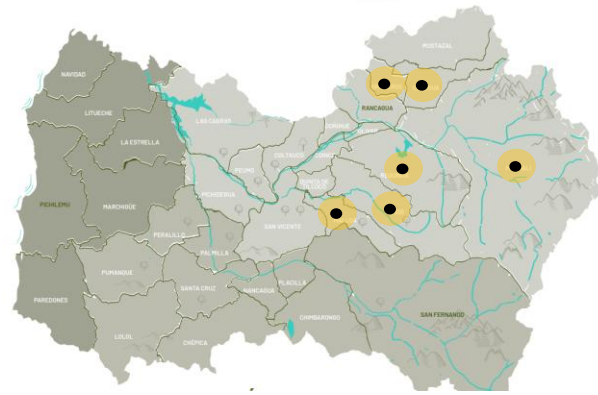


Value-Added Manufacturing

KEY LOCATIONS

Areas with a high density of agro-industries, packaging and logistics centers (**Requínoa**), areas of intensive production and irrigation modernization projects (**Malloa**) and technology hubs close to the regional capital (**Graneros**).

- **Requínoa**
- **Malloa**
- **Graneros**
- **Rengo**
- **Codegua**
- **Machalí**



SUPPORT ECOSYSTEM

- In the public sphere, the Regional Government of O'Higgins has demonstrated a strong commitment to agricultural innovation by financing projects with other entities such as 'Conecta y Colabora' and providing subsidies for technified irrigation systems, which allows for the financing of sensorization solutions, valve automation, the use of satellite imagery, and production management platforms.
- Entities that promote research in **water management, agricultural engineering, data science, and agricultural mechatronics**; key to training technicians and developing local capabilities.
- **Consolidated network of agro-industries** (Investment + Tech) and **Agtech entrepreneurial ecosystem**.



INVESTOR PROFILES



- Technology companies (national and international)



- National solution integrators and technology developers



- Impact investment funds and climate tech



- Local investors

RECOMMENDATIONS

- **Investing in technological solutions for agribusiness:** The use of sensors, monitoring systems, AI, and automation improves productivity, water efficiency, and resilience to climate change.
- **Leveraging the regional agrotechnological ecosystem:** O'Higgins accounts for more than 22% of the national agro-industrial GDP and has a consolidated network of agro-industry, R&D centers and public entities committed to innovation.
- **Focus investments in areas with high agricultural potential:** Municipalities such as Requínoa, Malloa, Graneros, and Rengo offer optimal conditions due to their density of agribusinesses, irrigation infrastructure, and logistics.
- **Access co-financing and public innovation platforms:** Initiatives such as 'Conecta y Colabora' (Connect and Collaborate) and the Tax Incentive Law make it possible to leverage private investment with public funds aimed at agricultural digitization and modernization.
- **Develop scalable solutions with global impact:** The region is an ideal laboratory for testing Agtech technologies in fruit growing, viticulture and intensive crops, with opportunities for transfer to other agricultural markets.



Value-Added Manufacturing

Opt. 6 NEW VALUE-ADDED CROPS

FOOD SAFETY SECTOR

Value-added crops refer to products that are distinguished by their **superior quality, specific attributes** (such as being organic, healthy or associated with a cultural tradition), and/or that have **undergone processing beyond basic raw materials**. In this context, products such as olive oil and quinoa have positioned themselves as products with high nutritional value and growing global demand.



- **Functional foods and superfoods** market

+275MM\$

Market value
(2024)

+7%

Annual growth
rate

- **Natural cosmetics** market

+9%

Annual growth
rate

Chile

one of the countries
with the highest per
capita consumption
in Latin America

- Opportunities in both **primary production** and **industrial transformation**:



Premium **Oils**.



Flour and products derived from
quinoa.



Natural cosmetics and soaps
made with olive oil or quinoa
extracts.

Chile has **unique agroclimatic conditions** and a commitment to **innovation and sustainability** that strategically position it to specialize in the production and export of high-value olive oil and quinoa.

Its ability to produce healthy, organic and differentiated foods, together with trade agreements that facilitate access to demanding markets, opens up wide opportunities in both **primary production** and **industrial transformation**, including premium oils, flours, gluten-free products and natural cosmetics.

Key potentialities of the O'Higgins region

- **Key production center for olive oil:** Its level of technification allows for high yields and access to gourmet markets with premium oils.
- **Optimal conditions for quinoa expansion:** The drylands of O'Higgins offer ideal soils and climate for 'lowlands' ecotype varieties.
- **Commitment to innovation and differentiation:** Initiatives in genetic improvement and sustainable production. Commitment to sustainability: Promotes sustainable practices, adapted to climate change, water efficiency and international competitiveness.



O'Higgins offers a highly conducive environment for investment in value-added products derived from olive oil and quinoa, thanks to its **favorable agroclimatic conditions, established agro-industrial infrastructure**, and an **agricultural ecosystem with tradition and experience**. The promotion of differentiated products—such as gourmet oils, functional flours, and natural cosmetics—allows for capitalization on premium national and international markets, while promoting the sustainable development of dryland areas and strengthening the economy of small and medium-sized producers organized into cooperatives.

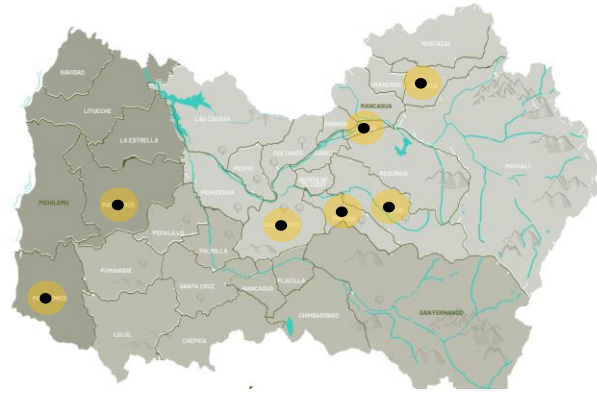


Value-Added Manufacturing

KEY LOCATIONS

- **Inland Coastal Drylands:** quinoa and resilient crops
- **North-Central Region:** olive trees and oil processing
- **Rengo, San Vicente, Malloa:** areas with agro-industrial infrastructure for processing, packaging and logistics

- Marchigüe
- Paredones
- Olivar
- Codegua
- Rengo
- San Vicente



SUPPORT ECOSYSTEM

- **GORE O'Higgins**, with programs supporting productive reconversion and rural value chains.
- **INDAP**, with special lines for small dryland farmers in the interior.
- **FIA**, financing the development of products such as quinoa flour and oil.
- **CORFO**, with calls for productive chains and regional innovation.
- **INIA Rayentué**, with genetic improvement and adaptation of quinoa to arid areas.
- **O'Higgins University**, with expertise in agribusiness and bioproducts.
- **Olivícola Monteolivo**, exporter of extra virgin olive oil, located in Olivar.
- **Quinoa cooperatives**
- **Local natural cosmetics startups**



INVESTOR PROFILES



- National agro-industries



- Impact investment funds



- Chilean start-ups in bioproducts



- Retail and national horeca channel



- Cosmetics companies

RECOMMENDATIONS

- **Focus on differentiated crops with high global demand:** Products such as olive oil and quinoa offer competitive advantages due to their nutritional value, traceability, and potential in gourmet and functional markets.
- **Invest in processing and development of derivatives:** Opportunities exist in both primary production and the manufacture of higher value-added products such as flours, soaps, cosmetics, and bioproducts.
- **Take advantage of unique agroclimatic conditions:** The inland drylands and the central-northern area of O'Higgins offer optimal conditions for resilient varieties and specialized dryland and high-end crops.
- **Coordinate with cooperatives, start-ups and R&D centers:** The regional ecosystem promotes innovation with technical support from INIA, UOH and Montefrutivo, as well as local groups focused on organic and sustainable production.
- **Access programs for productive reconversion and territorial impact:** Instruments from INDAP, FIA, CORFO and GORE O'Higgins facilitate the incorporation of new crops, equipment and infrastructure associated with rural value chains.



Value-Added Manufacturing

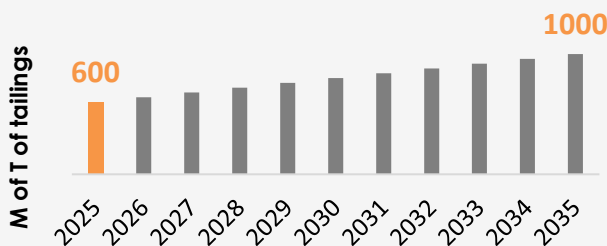
Opt. 7 COPPER MINING TAILINGS AND ASSOCIATED SERVICES

LOW-IMPACT
MINING
SECTOR

Copper mining in Chile has generated **more than 740 tailings deposits**, many of them inactive, which represent an environmental challenge and a strategic opportunity. These residues contain, such as copper, molybdenum and rare earths, which can be recovered through reprocessing. This recovery not only **allows secondary resources to be exploited**, but also **promotes specialized technological services**, in line with the principles of sustainability and the circular economy promoted at the national level.



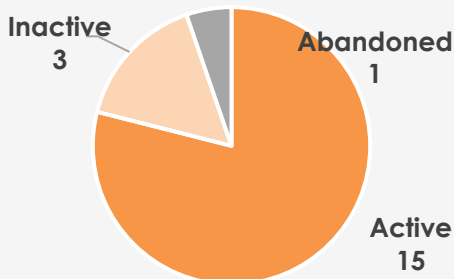
- Projected **mining waste generation** (millions of tons per year):



Despite historically being viewed as waste and an environmental liability, mining tailings represent a **tremendous opportunity for Chile** as they contain a large amount of valuable elements that can be extracted. The recovery of material present in tailings is imperative and aligns with the principles of the **circular economy** and the **National Mining Policy 2050**, which seeks to transform this waste into strategic assets.

19 Tailings deposits in O'Higgins

- 10 dams
- 9 reservoirs



77,28M

Authorized tonnage in the visible area

Potential in the O'Higgins Region:

- High availability of tailings with commercial value.**
- Successful circular economy case:** Minera Valle Central has been reprocessing tailings for over 30 years, with significant copper and molybdenum production and local job creation.
- Proven technical and economic viability:** Tailings with competitive grades (0.25–0.26% Cu) and processes already in place.
- Expanding innovation ecosystem:** Research in biotechnology (UOH), environmental recovery (Armony Sustentable) and risk management (SERNAGEOMIN).
- Growing demand for specialized services.**
- Institutional support and public funding.**



The increase in global demand for copper, rare earths and critical metals linked to clean technologies positions tailings as a relevant secondary source. In addition to its 19 registered tailings, O'Higgins has a **mature ecosystem that includes successful operations, advanced research and a favorable political framework**, creating a **highly favorable environment for new investments** in the exploitation of these mining assets and the expansion of a value chain for mining-related services.

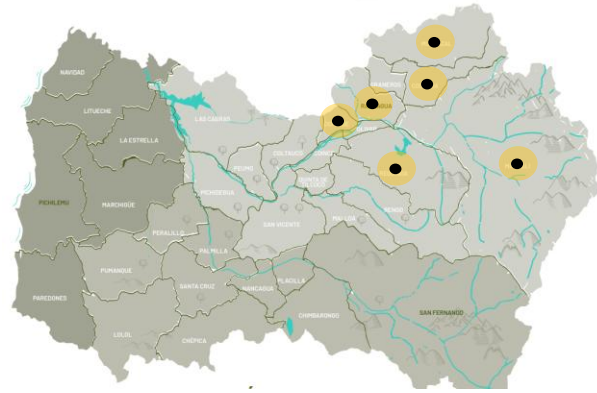


Value-Added Manufacturing

KEY LOCATIONS

- **Area of influence of El Teniente Division**, with active and inactive tailings deposits.
- **Smaller deposits** for reprocessing/conversion.
- **Areas of interest for environmental/geotechnical companies.**

- | | |
|------------|------------|
| • Machalí | • Rancagua |
| • Codegua | • Doñihue |
| • Requínoa | • Mostazal |



SUPPORT ECOSYSTEM

- **SERNAGEOMIN and SMA:** Services for reprocessing projects.
- **O'Higgins University (UOH):** Research lines applied to mining.
- **CORFO O'Higgins:** Productive chain and R&D programs in mining.
- **Codelco El Teniente Division:** leader in mining innovation, potential strategic partner..
- The business fabric includes companies such as **IM2, Hatch and Geovita**, consultants and providers of engineering, monitoring and remediation services in the region.
- In addition, there are **local suppliers** that can be integrated into logistics, auxiliary services and water treatment activities.



Universidad
de O'Higgins



HATCH



INVESTOR PROFILES



- Domestic and foreign mining companies



- Mining technology and sensor companies



- Impact investors



- Engineering consultants

RECOMMENDATIONS

- **Investing in reprocessing projects with a positive environmental impact:** Tailings recovery allows minerals to be recovered and environmental liabilities to be reduced, in line with the circular economy and national mining policy.
- **Harness the untapped mining potential in O'Higgins:** With more than 77 Mt authorized and 19 identified deposits, the region offers a visible volume of copper tailings with technical viability and logistical access.
- **Coordinate with local and specialized suppliers:** Regional companies such as IM2, Hatch and Geovita provide key technical capabilities to develop solutions in reprocessing, monitoring and remediation.
- **Access existing mining infrastructure and knowledge:** Proximity to the El Teniente Division provides logistical, technical and strategic synergies for implementing pilot or scalable projects.
- **Align investments with public regulations and incentives:** Entities such as SERNAGEOMIN, SMA and CORFO actively promote sustainable mining innovation and finance productive conversion projects.



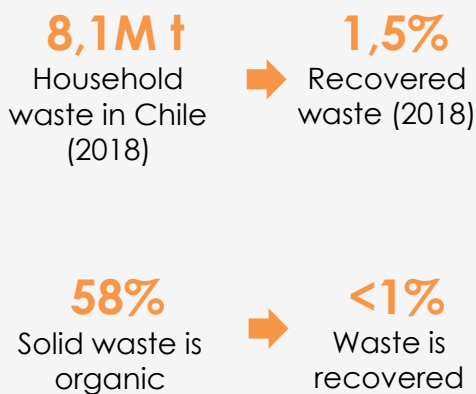
Value-Added Manufacturing

Opt. 8

WASTE MANAGEMENT AND REUSE

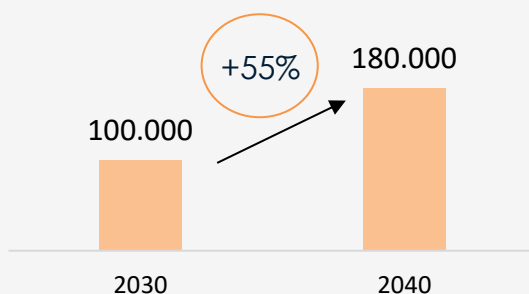
CIRCULAR ECONOMY SECTOR

Waste recovery consists of a set of actions that seek to **recover waste and/or its calorific value**, rather than discarding it. It focuses on **using waste as a resource, raw material and/or energy source**. This includes preparation for reuse, recycling and energy recovery. The recovery of both organic and industrial waste is a priority for the circular economy in Chile, where a **range of opportunities is opening up for the development of industries for the management, treatment and reuse of waste with economic value**.



The National Organic Waste Strategy (NOWS), published in 2021, has the **goal of recovering 66% of municipal organic waste by 2040**, with an intermediate goal of 30% by 2030.

- Projected **job creation through the circular economy** (number of jobs/year):



Chile faces a **structural challenge in waste management**: it **recycles only 13%** and **recovers 1.5%** of household waste, despite **generating more than 8 million tons per year**. Organic waste, which accounts for 58% of total municipal waste, is hardly recovered, causing environmental impacts and resource losses. In response, the country has adopted a **national circular economy strategy**, with targets such as recovering **66% of organic waste by 2040**.

Key enabling conditions for O'Higgins:

- **High volume of agro-industrial waste**: estimated at over 250,000 tons per year.
- **Natural resource-intensive business base**: existence of agro-industrial and mining clusters.
- **Basic infrastructure and logistics available**: road corridors, proximity to the capital region, existing treatment plants, etc.
- **Growing environmental and regulatory pressure**: saturated areas, socio-environmental conflicts, mandates, etc.
- **Presence of waste-generating productive sectors**: Such as the agricultural, mining and industrial sectors.
- **Local success stories**: Companies such as Viña Concha y Toro already recover 100% of their waste.



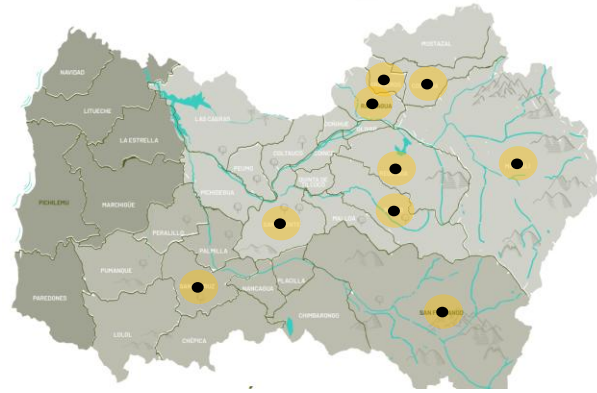
Waste recovery in Chile is an **urgent necessity in order to mitigate environmental impacts and meet international commitments and also represents a strategic investment opportunity**. The O'Higgins Region offers a **high volume of agro-industrial waste** (more than 250,000 tons/year), a **business intensive in natural resources, available infrastructure and logistics**, and growing **environmental and regulatory pressure** driving the transition towards more sustainable models.



Value-Added Manufacturing

KEY LOCATIONS

- Agro-industrial hubs (**Rengo, Requinoa, San Fernando y Graneros**)
 - Areas with mining operations and industrial workshops (**Machalí**)
 - Communes with agricultural cooperatives (**Santa Cruz**)
- | | |
|--------------|---------------|
| • Rengo | • Requinoa |
| • Machalí | • Codegua |
| • Santa Cruz | • San Vicente |



SUPPORT ECOSYSTEM

- Regional Government and Regional Ministerial Secretariat for the Environment:** circular economy and waste management.
- CORFO O'Higgins:** innovation and sustainability linked to recycling and bioeconomy.
- University of O'Higgins and Pro O'Higgins:** research, training and networking.
- Municipalities and Municipal Associations:** household waste management and infrastructure.
- Refrigerators, vineyards, and exporters** (Garces Fruit, Subsole, Santa Cruz Wines): potential generators of recoverable waste
- Waste management companies** (Veolia, KDM, Bioils): with experience in recycling, composting, and reverse logistics



LOH Universidad de O'Higgins

PRO O'HIGGINS



GARCES FRUIT

subsole

VINA SANTACRUZ

VEOLIA

kdm EMPRESAS

BIOILS

INVESTOR PROFILES



- Circular economy companies



- Impact funds and green investment



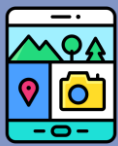
- Agricultural exporters with waste verticalization



- Mining companies and contractors

RECOMMENDATIONS

- Invest in recovery and circularity solutions:** The current low recovery rate (1.5%) opens up opportunities to implement technologies that make use of agricultural, organic, and industrial waste with high reuse potential.
- Take advantage of available volume and projected growth:** O'Higgins generates more than 425,000 tons of agro-industrial waste per year and projects a 55% increase in recoverable waste by 2040, offering opportunities for scale models.
- Coordinate with local management and recycling actors:** Companies such as Veolia, KDM, and local cooperatives provide expertise and technical capabilities for the development of collaborative circular economy solutions.
- Develop business models with environmental and social impact:** Opportunities exist in composting, recycling, biogas, fruit and vegetable waste utilization, and organic fertilizer production.
- Align investments with public policies and green financing:** The National Organic Waste Strategy and regional innovation programs provide technical support and tools to promote these types of initiatives.



Special Interest Tourism

Opt. 9

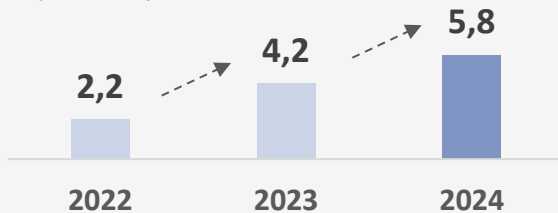
DEVELOPMENT OF THE TOURISM INDUSTRY

TOURISM EXPERIENCES SECTOR

Special interest tourism refers to a growing trend in which **tourists seek new experiences** in destinations considered exotic or with incipient tourism development, or those with pristine nature. The interests of these tourists have evolved to involve direct interaction between visitors and nature, as well as with local communities and traditions. The privileged natural environment of the O'Higgins Region and its rich heritage present a unique opportunity for the development of a comprehensive and sustainable tourism offering for the area.



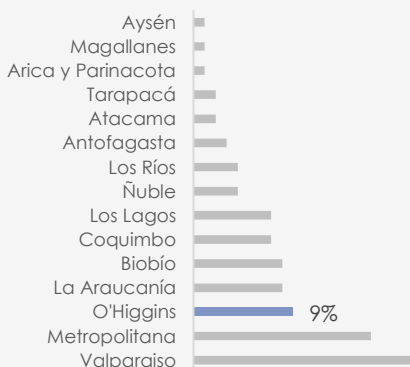
- Number of **visitors** entering the country (millions)



+ 3.619M\$

Revenue derived from tourism in Chile
(2024)
+23% vs 2023

- Distribution of **visitors by destination region** (January to October 2024)



Noteworthy tourism activities



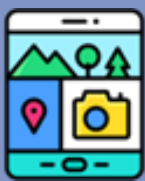
Tourism is a **strategic economic activity** for Chile, having experienced continuous expansion and diversification globally over the last sixty years, becoming one of the fastest-growing economic sectors. According to the UNWTO, **nature tourism** grew by **14%** in Latin America in 2023, and wine tourism is projected to **increase by 16% annually until 2030**.

Key characteristics of the O'Higgins Region:

- Diverse tourism offerings with high potential:** Wine tourism, agritourism, adventure tourism, cultural and creative tourism.
- Innovative projects under development:** New routes and experiences such as the Mausoleo de los Andes in San Fernando to position emerging destinations.
- Privileged natural environment:** +50,000 hectares, a wide variety of landscapes and ecosystems, 84 trekking routes, and outdoor sports throughout the year.
- Strategic connectivity:** Proximity to Santiago, integration of scenic and wine tourism routes, future Paso Las Leñas tunnel with international projection.
- Institutional support and regional tourism planning.**
- Investment opportunities:** Specialized tourism services, hotel services, outdoor hubs, cultural and event infrastructure, etc.



Thanks to its geographical diversity, cultural richness, and proximity to Santiago, the **O'Higgins Region** has established itself as a **destination for special interest tourism** (nature, adventure, wine tourism, and local experiences), reinforced by international recognition such as Colchagua, a member of the Wine Capitals Network. Added to this is a still under-exploited natural offering, a vibrant cultural identity, and a growing demand for sustainable and authentic experiences.

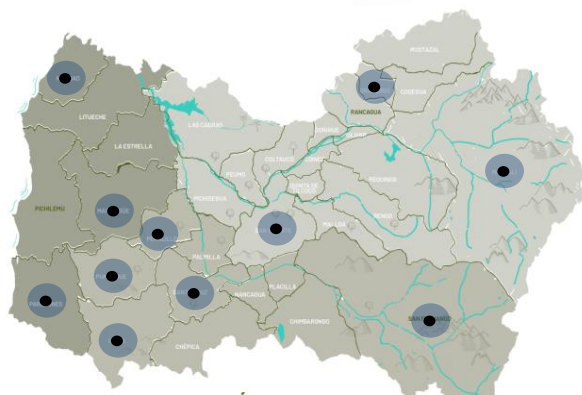


Special Interest Tourism

KEY LOCATIONS

- **Valle de Colchagua:** gastronomy, hospitality, and museums
- **Reserva Nacional Río Cipreses/Coya:** mountain/nature
- **Pichilemu/Costa sur:** beach tourism
- **San Fernando/Graneros:** mountain and nature

- | | |
|--------------|----------------|
| • Santa Cruz | • Lolol |
| • Machalí | • Navidad |
| • Pumanque | • San Fernando |



SUPPORT ECOSYSTEM

- **SERNATUR O'Higgins:** themed routes, promotional campaigns, and tourism quality programs.
- **Municipalities and local tourism corporations:** community tourism development plans.
- **Trade associations:** wineries, chambers of tourism, and local operators.
- **University of O'Higgins and technical training centers:** tourism management, gastronomy, etc.

At the business level, there is a consolidated base of vineyards with tourist infrastructure, adventure tourism operators, small hoteliers, and mid- to high-end accommodation projects. The coordination of these actors would allow for the development of integrated tourism products and the scaling up of the offering.



UOH Universidad de O'Higgins



Municipalities, tourism corporations, and trade associations



INVESTOR PROFILES



- Domestic investors in rural and experiential tourism
- Wineries interested in expanding their tourism value chain

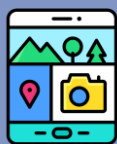


- Foreign adventure tourism companies or premium agencies
- Investment funds or family offices



RECOMMENDATIONS

- **Commit to sustainable and differentiated tourism experiences:** The region offers a diverse range of wine tourism, nature tourism, and adventure tourism, with a privileged environment and low overcrowding.
- **Invest in tourism infrastructure with local identity:** There is high demand for accommodation, heritage routes, gastronomic services, and integrated projects in rural areas with cultural and natural value.
- **Take advantage of connectivity and proximity to Santiago:** The strategic location facilitates access for national and international visitors, ideal for weekend tourism projects and short getaways.
- **Coordinate with a consolidated public and trade ecosystem:** Entities such as SERNATUR, municipalities, wineries, and local operators promote routes, tourism quality, and activities with international projection.
- **Build on the boom in special interest tourism:** Global trends favor investments in emerging destinations that prioritize sustainability, authenticity, and connection with the local community.



Special Interest Tourism

Opt.10

HOTEL INFRASTRUCTURE AND ACCOMMODATION

REAL ESTATE
INVESTMENT
SECTOR

The sustained growth of tourism in the O'Higgins Region, both leisure and corporate and business, has placed **increasing pressure on the available hotel infrastructure**. This situation highlights gaps in coverage, quality, and segmentation of accommodation, and opens up **space for new investments**, particularly in themed hotel developments, mid-to-high-end accommodation, and hybrid proposals (business/experiential).



~280

Tourist
accommodations
throughout the
region

9%

Domestic tourist
trips (january-
october 2024)

3°

Destination
region among
nationals
(january-october
2024)

■ **69.124**
overnights
(january 2025)

+ 6,6%
overnights
(Vs. january 2024)

■ **\$22.929**
average income
(RevPAR, january 2025)

+ 26,1%
RevPAR
(Vs. january 2024)

BUSINESS AND WORK travel has
increased due to **niche demand**:



Agribusiness



Mining



Events

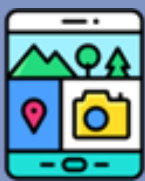
O'Higgins accounts for only 2.7% of domestic tourist arrivals nationwide (SERNATUR, 2023), but with **high occupancy rates concentrated in the Cachapoal Valley (>70%) and Colchagua Valley (>60%)**, which saturates demand in surrounding municipalities; while there is growing demand in new locations:

- There is a **low density of executive or corporate hotels** in municipalities with strong agro-industrial and mining activity, such as San Fernando or Rancagua.
- In addition, **work and business travel to the region has grown** without adequate hotel supply, resulting in overnight stays outside the region.

- ✓ The shortage of accommodation and the growing demand for overnight stays in the region creates **opportunities for investment in enabling infrastructure**: development of conventional **hotel offer, boutique and themed accommodation, eco-lodges**, or the **restoration and enhancement of heritage** properties for tourist use, among others.



- **Strategic location**: proximity to Santiago, with direct connectivity (also coast/foothills).
- **High tourist appeal in Colchagua**, one of Chile's most renowned wine tourism destinations.
- **Growth in corporate and business demand** in areas such as San Fernando (agribusiness) and Rancagua (industry, mining, services).
- **Availability of urban and rural land** at a relatively low cost (compared to other regions).
- Trend toward **growth in rural land subdivisions and real estate developments**.



Special Interest Tourism

KEY LOCATIONS

The opportunity focuses on the development of **new hotel, tourist, and corporate accommodation infrastructure** in strategic areas of the region, such as:

- High tourist demand (wine tourism/events)
- Business/corporate tourism and coastal tourism

- | | |
|-----------------------|--------------------|
| • Santa Cruz | • Colchagua |
| • San Fernando | • Rancagua |
| • Navidad | • Matanzas |



SUPPORT ECOSYSTEM

- The business fabric (vineyards, agro-industries, event centers, and local tour operators) requires infrastructure for visitors and corporate clients. There is an expanding ecosystem of tourism service providers, although hotel standardization remains low (lack of medium-sized and international chains).
- **Public institutions:** SERNATUR O'Higgins, Regional Development Corporation (CDR), Regional Government, municipalities with tourism development plans.
- **University of O'Higgins:** training programs in tourism, territorial planning, and administration.
- **Trade associations:** Colchagua Chamber of Tourism, Pro O'Higgins, wineries associated with Enoturismo Chile.



INVESTOR PROFILES



- **Family offices** with an interest in rural or tourist real estate assets
- **Local investors** (vineyards, agribusinesses) wishing to diversify
- **Real estate companies** specializing in tourism or second homes



- **Funds** specializing in hospitality and sustainable tourism



- **Hotel chains** looking to expand outside Santiago



- **Global tour operators** interested in establishing their own infrastructure

RECOMMENDATIONS

- **Invest in new hotel developments in areas with high demand and low supply:** Colchagua, San Fernando, and Rancagua have high occupancy rates and a lack of accommodation.
- **Diversify the offering with hybrid proposals:** Opportunities are opening up to combine accommodation with tourist experiences, corporate events, gastronomy, or wellness.
- **Invest in high-potential tourist real estate assets:** Growing demand for overnight stays in the region is driving investment models such as lodges, aparthotels, and tourist residences.
- **Take advantage of the flow of business and event travel:** Corporate and agro-industrial tourism drives stable demand in sectors such as agro-industry, mining, and wine tourism.
- **Coordinate with local actors and the public ecosystem:** Vineyards, municipalities, event centers, and organizations such as SERNATUR and CDR support the development of tourism infrastructure and planning.

Region of opportunities O'Higgins

Scan to see the full details of
each opportunity.

