

Required Report: Required - Public Distribution

Date: December 12, 2022

Report Number: CI2022-0029

Report Name: Citrus Annual

Country: Chile

Post: Santiago

Report Category: Citrus

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Report Highlights:

In marketing year (MY) 2021/22, citrus yields decreased due to frost during the winter in the Valparaíso, Metropolitana, and O'Higgins regions. FAS Santiago estimates lemon production to decrease by 30 percent to 140,000 metric tons (MT) in MY 2021/22 and to bounce back to 200,000 metric tons in MY 2022/23, assuming normal yields. Likewise, in MY 2021/22, orange production will decrease by 18 percent totaling 164,000 metric tons, then increase by 22 percent to 200,000 MT in MY 2022/23 as production recovers. In MY 2022/23, mandarin production will increase by 39.4 percent and total 237,000 MT following an increase in area planted and assuming normal yields. FAS Santiago estimates that MY 2021/22 mandarin production (includes mandarins, clementines, and tangerines) will total 170,000 MT, a 26.1 percent decrease over MY 2020/21.

Commodities:
Lemons, Fresh

Table 1: Production, Supply and Distribution

| Lemons/Limes, Fresh Market Year Begins Chile | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|--|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HECTARES) | 0 | 7340 | 0 | 8040 | 0 | 8500 |
| Area Harvested (HECTARES) | 0 | 7100 | 0 | 8000 | 0 | 8300 |
| Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total No. Of Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1000 MT) | 0 | 200 | 0 | 140 | 0 | 200 |
| Imports (1000 MT) | 0 | 13 | 0 | 15 | 0 | 12 |
| Total Supply (1000 MT) | 0 | 213 | 0 | 155 | 0 | 212 |
| Exports (1000 MT) | 0 | 102 | 0 | 60 | 0 | 100 |
| Fresh Dom. Consumption (1000 MT) | 0 | 100 | 0 | 86 | 0 | 101 |
| For Processing (1000 MT) | 0 | 11 | 0 | 9 | 0 | 11 |
| Total Distribution (1000 MT) | 0 | 213 | 0 | 155 | 0 | 212 |
| (HECTARES), (1000 TREES), (1000 MT) | | | | | | |

Source: Post Estimates

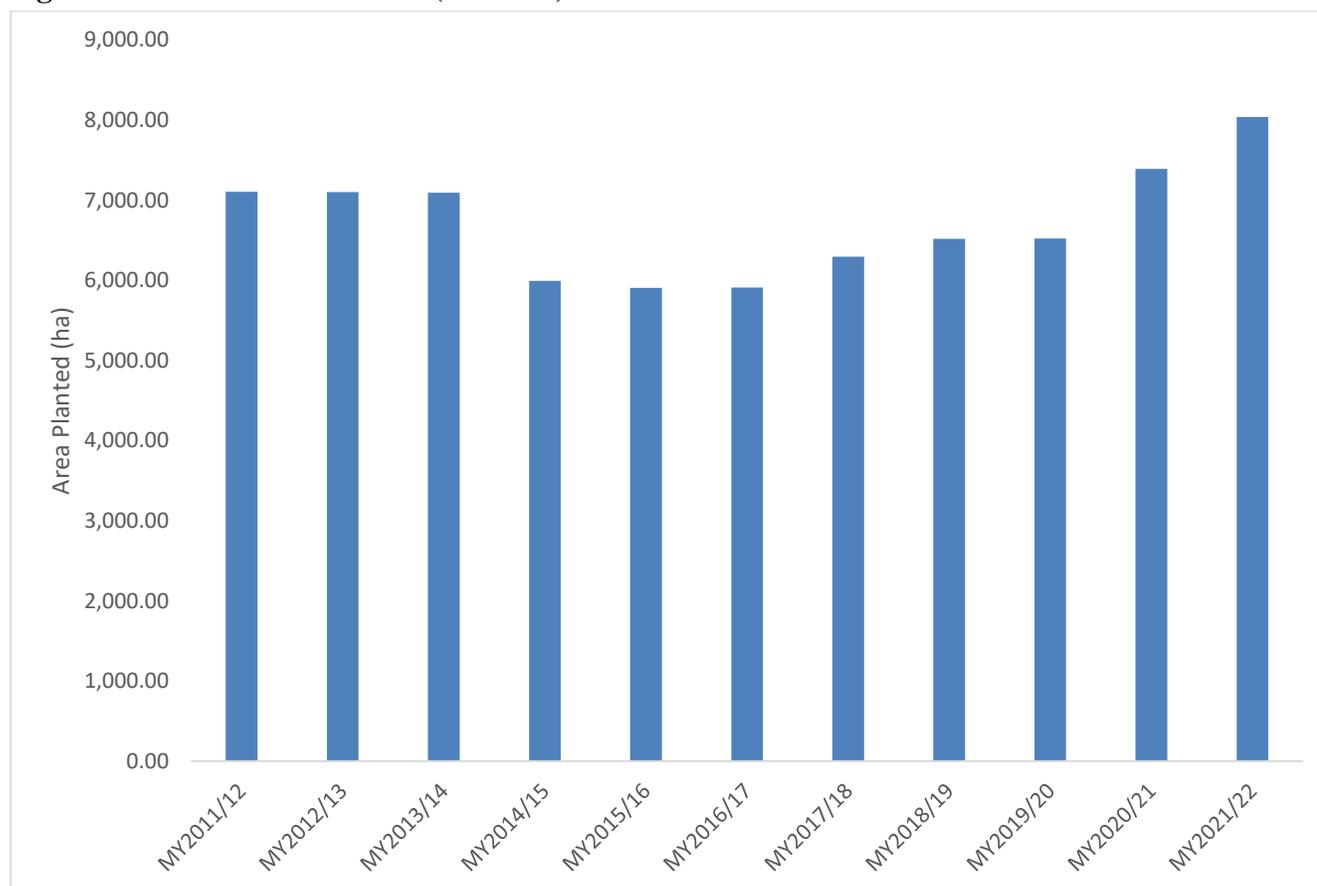
Production:

FAS Santiago (Post) estimates MY 2022/23 area planted at 8,500 hectares (ha), a 5.7 percent increase over MY 2021/22, following the growth trend of the past three marketing years (Figure 1). The trend is explained by farmers moving toward more profitable crops, like citrus. Lemon area planted in Chile grew from 5,911 hectares in MY 2016/17 to 8,038 hectares in MY 2021/22.

In MY 2022/23 post projects lemon production at 200,000 MT assuming no unexpected climatic events impacting production. For MY 2021/22, Post estimates production to decrease by 30 percent to 140,000 MT due to frost during the winter that reduced yields in many lemon producing areas.

The lemon production area is in the northern and central part of the country, from the *Coquimbo* region to the *O'Higgins* region. Lemon area planted grew in all of Chile's producing regions during the past three marketing years (Table 2). The *Metropolitana* region, in the central part of Chile holds 41.1 percent of the lemon area planted, making it the top producing region. Citrus became a viable alternative to other crops such as avocado because of its high price and low water requirement. Chile produces lemons in the summer months between December and March for the domestic market and during the winter months between June and September for the export market.

Figure 1: Lemon Area Planted (hectares)



Source: ODEPA, 2022

Table 2: Lemon Area Planted by Region MY 2021/22 (hectares)

| Region | Area Planted (ha) | Variation* (%) | Share (%) |
|---------------|-------------------|----------------|---------------|
| Atacama | 90 | 160.3% | 1.1% |
| Coquimbo | 1,628 | 13.3% | 20.3% |
| Valparaíso | 2,022 | 22.0% | 25.1% |
| Metropolitana | 3,303 | 18.1% | 41.1% |
| O'Higgins | 983 | 69.2% | 12.2% |
| Others | 13 | - | 0.2% |
| Total | 8,038 | 23.4% | 100.0% |

*Variation of planted area is measured every third year; data provided are last available

Source: Based on data from ODEPA

Consumption:

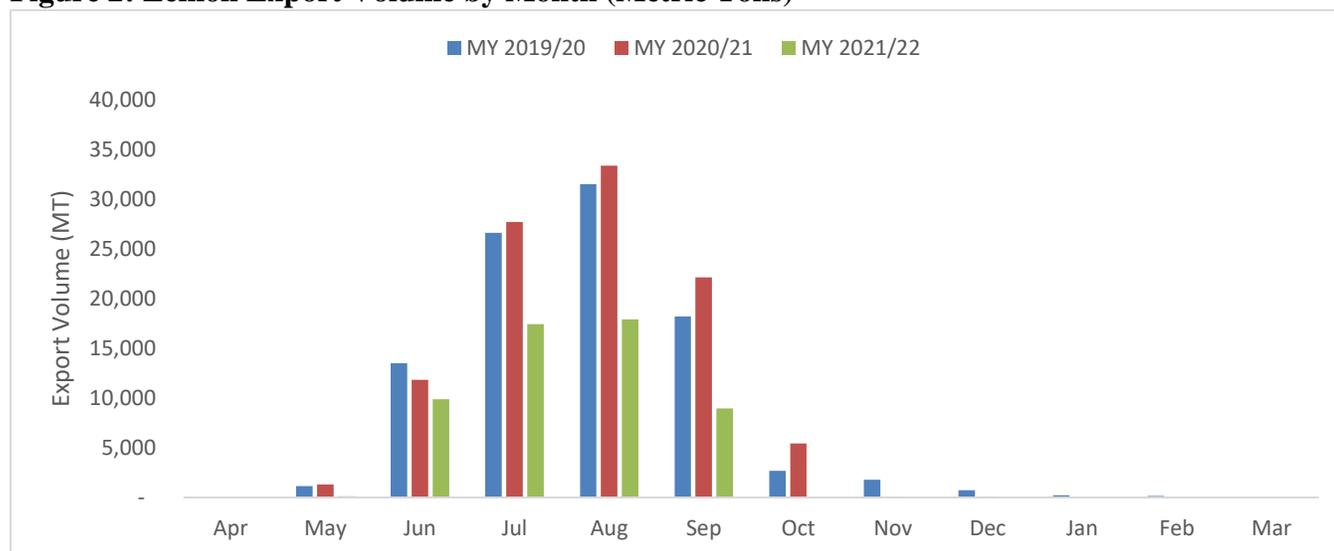
In MY 2022/23, Post projects domestic consumption will increase to 101,000 MT as production bounces back to normal levels. Post estimates MY 2021/22 domestic consumption of fresh lemons at 86,000 MT, a 14 decrease from MY 2020/21 due to lower production. Domestic lemon consumption is strong and peaks between December and March, when the supply is low, and prices are high.

In MY 2022/23, Post projects consumption for processing to bounce back to 11,000 MT, which is in line with historical consumption levels. Lemons are processed to produce juice, essential oils, or concentrates for confectionary. In MY 2021/22 consumption of lemons for processing will decrease by 18.2 percent and total 9,000 MT, following the reduction in production.

Trade:

In MY 2022/23, Post projects exports to reach 100,000 MT assuming a normal production year. In Chile, the lemon marketing year starts April with the beginning of the harvest season. The bulk of exports takes place between June and September each year and peaks in July or August depending on the climatic and market conditions (Figure 2).

Figure 2: Lemon Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC.

In MY 2021/22 (data until September), due to lower production, lemon exports decreased by 43.6 percent (Table 3). Post estimates MY 2021/22 lemon exports at 60,000 MT due to lower production caused by frost. In MY 2020/21, Chile exported 101,996 MT of lemons to the world, a 5.6 percent increase over MY 2019/20. This increase in exports was a result of the increase in area planted and production.

The United States is the top market for Chilean lemons. In MY 2020/21, Chile exported 65,682 MT to the United States, which represented 64.4 percent of export volume (Table 3). Chile also exports lemons to Japan, China, and South Korea.

Table 3: Lemon and Limes Export Volume to the World (MT)

| Commodity: 080550, Lemons and Limes, Fresh or Dried | | | | | | |
|--|------------------------|------------------------|----------------------|-----------------------------|-----------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 96,606 | 101,996 | 5.6% | 96,402 | 54,346 | -43.6% |
| United States | 54,458 | 65,682 | 20.6% | 61,163 | 29,714 | -51.4% |
| Japan | 18,705 | 17,056 | -8.8% | 16,916 | 15,508 | -8.3% |
| China | 5,657 | 6,532 | 15.5% | 6,335 | 1,558 | -75.4% |
| South Korea | 5,343 | 4,999 | -6.4% | 4,340 | 4,154 | -4.3% |
| Netherlands | 4,575 | 4,630 | 1.2% | 4,630 | 901 | -80.5% |
| Denmark | 821 | 962 | 17.2% | 962 | 1,434 | 49.1% |
| Spain | 966 | 858 | -11.2% | 858 | 689 | -19.7% |
| Italy | 1,298 | 617 | -52.5% | 617 | 209 | -66.1% |
| Germany | 74 | 173 | 133.8% | 173 | 0 | -100.0% |
| Finland | 0 | 115 | | 115 | 0 | -100.0% |
| Canada | 70 | 95 | 35.7% | 95 | 12 | -87.4% |
| Dominican Republic | 30 | 56 | 86.7% | 37 | 44 | 18.9% |
| Colombia | 88 | 54 | -38.6% | 54 | 45 | -16.7% |
| Panama | 40 | 49 | 22.5% | 37 | 39 | 5.4% |
| Brazil | 389 | 47 | -87.9% | 0 | 0 | 0 |
| Others | 16,402 | 29,439 | 79.5% | 25,994 | 5,121 | -80.3% |

Source: Trade Data Monitor, LLC

Table 4: Lemon and Limes Export Value to the World (USD)

| Commodity: 080550, Lemons and Limes, Fresh or Dried | | | | | | |
|--|-----------------------------|-----------------------------|--------------------------|--------------------------------------|--------------------------------------|----------------------|
| Partner Country | Marketing year | | | Year to Date | | |
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 93,478,717 | 91,443,331 | -2.2% | 87,010,354 | 44,152,820 | -49.3% |
| United States | 43,744,658 | 48,922,120 | 11.8% | 45,840,316 | 19,981,314 | -56.4% |
| Japan | 17,133,466 | 15,441,978 | -9.9% | 15,311,400 | 13,643,232 | -10.9% |
| China | 6,754,663 | 7,740,553 | 14.6% | 7,544,138 | 1,687,886 | -77.6% |
| South Korea | 7,065,950 | 7,721,367 | 9.3% | 6,766,702 | 5,910,275 | -12.7% |
| Netherlands | 6,445,947 | 6,916,507 | 7.3% | 6,916,507 | 545,054 | -92.1% |
| Denmark | 1,687,982 | 2,232,525 | 32.3% | 2,232,525 | 922,413 | -58.7% |
| Spain | 1,221,553 | 1,063,479 | -12.9% | 1,063,479 | 1,071,217 | 0.7% |
| Italy | 899,542 | 730,664 | -18.8% | 730,664 | 166,594 | -77.2% |
| Canada | 62,438 | 165,600 | 165.2% | 165,600 | 7,829 | -95.3% |
| Germany | 72,000 | 100,800 | 40.0% | 100,800 | 0 | -100.0% |
| Colombia | 100,467 | 75,185 | -25.2% | 75,185 | 63,264 | -15.9% |
| Panama | 4,255,704 | 70,652 | -98.3% | 57,248 | 49,261 | -14.0% |
| Dominican Republic | 43,181 | 70,190 | 62.5% | 48,020 | 51,744 | 7.8% |
| United Kingdom | 501,354 | 58,504 | -88.3% | 58,504 | 206 | -99.6% |
| Others | 3,489,812 | 133,207 | -96.2% | 99,266 | 52,531 | -47.1% |

Source: Trade Data Monitor, LLC

Table 5: Lemon and Limes Import Volume from the World (MT)

| Commodity: 080550, Lemons and Limes, Fresh or Dried | | | | | | |
|--|----------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 11,356 | 12,703 | 11.9% | 5,599 | 5,273 | -5.8% |
| Peru | 8,027 | 10,350 | 28.9% | 4,617 | 3,107 | -32.7% |
| Colombia | 2,204 | 1,827 | -17.1% | 915 | 374 | -59.1% |
| United States | 1,116 | 324 | -71.0% | 66 | 41 | -37.9% |
| Brazil | 0 | 202 | - | 0 | 1,752 | - |
| Others | 9 | - | -100.0% | - | - | - |

Source: Trade Data Monitor, LLC

Table 6: Lemon and Limes Import Value from the World (USD)

| Commodity: 080550, Lemons and Limes, Fresh or Dried | | | | | | |
|--|-----------------------------|-----------------------------|--------------------------|--------------------------------------|--------------------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 9,555,503 | 11,150,800 | 16.7% | 4,572,920 | 4,416,557 | -3.4% |
| Peru | 6,128,183 | 8,490,430 | 38.5% | 3,556,418 | 2,664,407 | -25.1% |
| Colombia | 1,908,748 | 1,939,101 | 1.6% | 929,052 | 327,561 | -64.7% |
| United States | 1,512,184 | 575,027 | -62.0% | 87,033 | 44,645 | -48.7% |
| Brazil | 0 | 142,680 | - | 0 | 1,379,944 | - |
| Others | 6,388 | 3,562 | -44.2% | 417 | - | -100.0% |

Source: Trade Data Monitor, LLC

Policy:

Chile is looking for ways to diversify citrus exports to countries other than the United States. In May 2020, Chile gained access to the Chinese market for lemons, mandarins, oranges, and grapefruit. Post does not expect any short-term market shifts resulting from the new market access.

Commodities:

Oranges, Fresh

Table 7: Production, Supply and Distribution

| Oranges, Fresh Market Year Begins Chile | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | May 2020 | | May 2021 | | May 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HECTARES) | 0 | 6326 | 0 | 6371 | 0 | 6400 |
| Area Harvested (HECTARES) | 0 | 6150 | 0 | 6180 | 0 | 6200 |
| Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total No. Of Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1000 MT) | 0 | 200 | 0 | 164 | 0 | 200 |
| Imports (1000 MT) | 0 | 3 | 0 | 3 | 0 | 3 |
| Total Supply (1000 MT) | 0 | 203 | 0 | 167 | 0 | 203 |
| Exports (1000 MT) | 0 | 105 | 0 | 86 | 0 | 105 |
| Fresh Dom. Consumption (1000 MT) | 0 | 86 | 0 | 71 | 0 | 86 |
| For Processing (1000 MT) | 0 | 12 | 0 | 10 | 0 | 12 |
| Total Distribution (1000 MT) | 0 | 203 | 0 | 167 | 0 | 203 |
| (HECTARES), (1000 TREES), (1000 MT) | | | | | | |

Source: Post Estimates

Production:

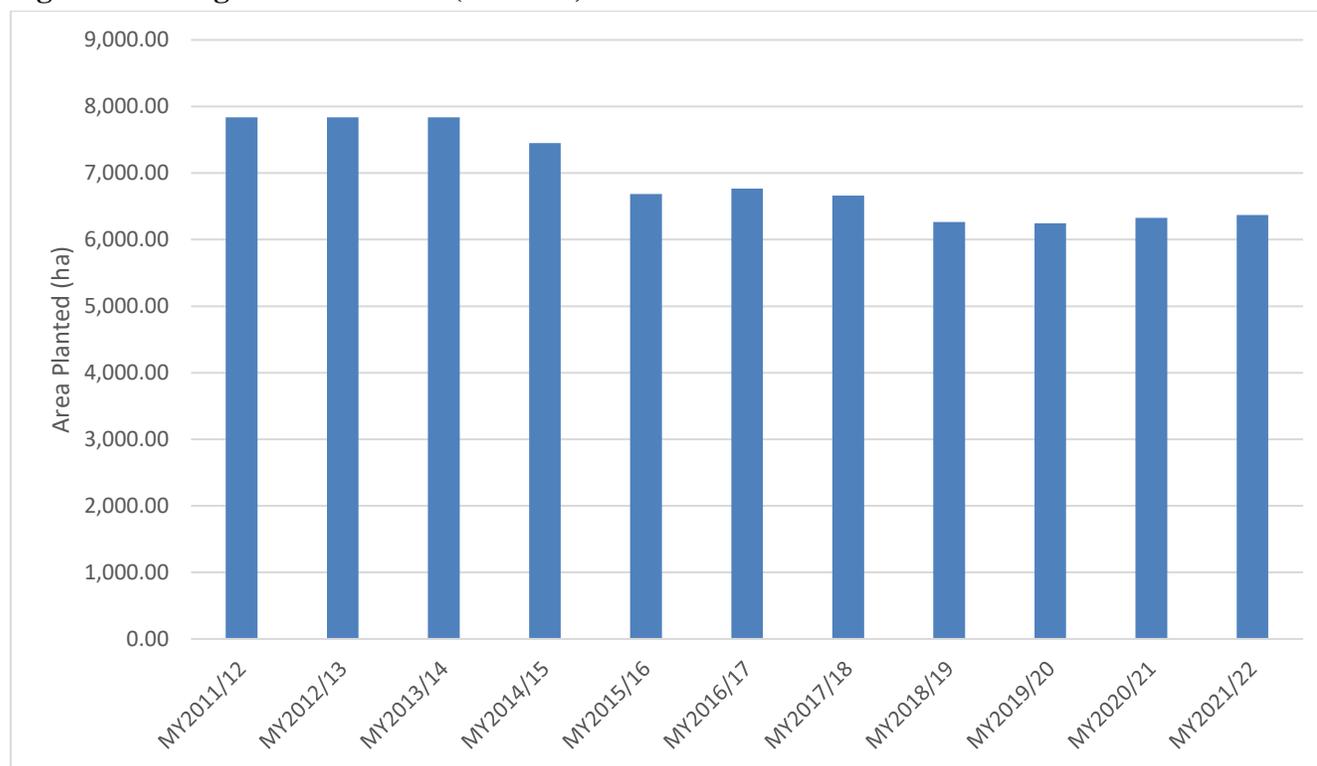
In MY 2022/23, Post estimates area planted in oranges to reach 6,400 hectares, a 0.5 percent increase. In MY 2021/22, orange area planted totaled 6,371 hectares, a 0.7 percent increase over MY 2020/21 (Figure 3).

In MY 2011/12, orange area planted totaled 7,389 hectares but it gradually decreased as producers shifted to mandarins and lemons because of their higher profitability. However, according to post sources, citrus producers keep a part of their area covered with orange orchards because it allows them to pace the citrus harvest and maintain production and exports steady throughout the season.

In MY 2022/23, orange production will increase by 22 percent and total 200,000 MT, assuming standard yields. Post estimates MY 2021/22 orange production to decrease by 18 percent totaling 164,000 MT due to frost in the production area.

Orange production in Chile is concentrated in the central part of the country. The *Metropolitana* region is the top orange producing region in Chile, holding 39.3 percent of the orange area planted. The *O'Higgins* region holds 31.3 percent of the area planted (Table 8). Area planted in the *Metropolitana*, and the *O'Higgins* regions increased in the past three marketing years by 8.5 percent and 13.5, respectively. The *Coquimbo* and *Valparaiso* regions are also important orange production centers in Chile. However, planted area in these regions decreased by 22.6 and 8.9 percent, respectively, due to a shift of planted area to mandarins and lemons.

Figure 3: Oranges Area Planted (hectares)



Source: ODEPA, 2022

Table 8: Orange Area Planted by Region MY 2021/22 (hectares)

| Region | Area Planted (ha) | Variation* (%) | Share (%) |
|---------------|-------------------|----------------|---------------|
| Tarapaca | 42 | -0.6% | 0.7% |
| Atacama | 14 | -54.8% | 0.2% |
| Coquimbo | 603 | -22.6% | 9.5% |
| Valparaíso | 1,186 | -8.9% | 18.6% |
| Metropolitana | 2,506 | 8.5% | 39.3% |
| O'Higgins | 1,996 | 13.5% | 31.3% |
| Others | 23 | - | 0.4% |
| Total | 6,371 | 1.7% | 100.0% |

*Variation of planted area is measured every third year; data provided are last available

Source: Based on data from ODEPA

Consumption:

In MY 2022/23, fresh domestic consumption will increase to 98,000 MT as production recovers. Orange consumptions consists of fresh domestic consumption and processing for orange juice. Out of total production, Post estimates around half goes to export and half to domestic consumption.

In MY 2021/22, due to lower production, Post estimates total domestic consumption at 81,140 MT, which is a 17.5 percent decrease from MY 2020/21 and represents 50 percent of commercial production.

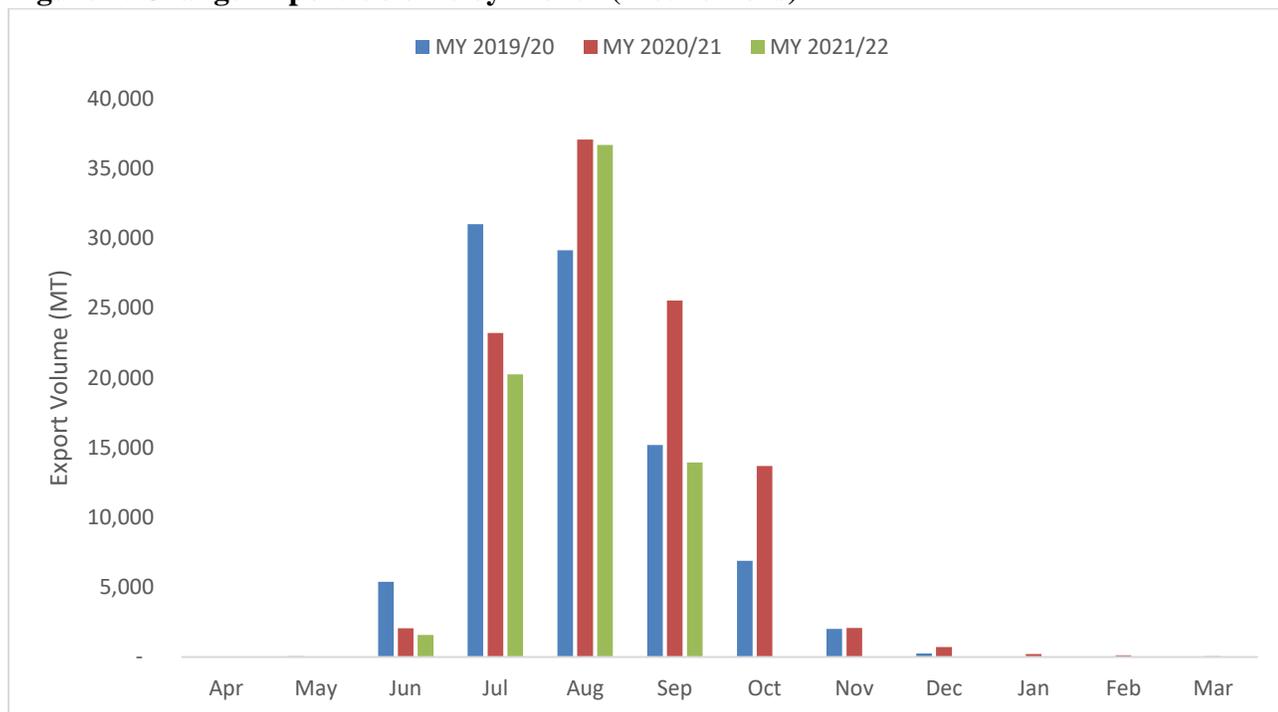
During the same marketing year, fresh domestic consumption will total 71,000 MT and oranges for processing will reach 10,140 metric tons.

Trade:

In MY 2022/23, Post projects exports to improve and total 105,000 MT due to recovered production. In MY 2021/22 (data until September), orange exports decreased by 17.6 percent from MY 2020/21 and totaled 72,404 (Table 9). Exports to the United States, the largest market for Chilean oranges, decreased by 17.8 percent.

In Chile, the orange marketing year starts April with the beginning of the harvest season. The bulk of Chilean orange export takes place between July and September each year and peaks around August (Figure 4). In MY 2021/22, monthly orange exports during the peak months were lower than the same period in MY 2020/21. Post does not expect monthly exports to recover in the remainder of MY 2021/22 since the decline in exports was associated with lower production. MY 2021/22 exports will total 85,860 MT, an 18 percent decrease over MY 2020/21.

Figure 4: Orange Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

In MY 2020/21, Chile exported 104,714 MT of oranges to the world, a 16.4 percent increase over MY 2019/20. In MY 2020/21, Chile exported 96,319 MT of oranges to the United States, which represented 92 percent of total exports. Chile exports oranges to various other countries, such as Ecuador, the Dominican Republic, and Canada, but in smaller quantities compared to the volumes shipped to the United States.

Table 9: Orange Export Volume to the World (MT)

| Commodity: 080510, Oranges, Fresh | | | | | | |
|--|--------------------------------|--------------------------------|--------------------------|-------------------------------------|-------------------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 89,946 | 104,714 | 16.4% | 87,817 | 72,404 | -17.6% |
| United States | 81,928 | 96,319 | 17.6% | 82,813 | 68,087 | -17.8% |
| Ecuador | 1,025 | 1,596 | 55.7% | 814 | 631 | -22.5% |
| Dominican Republic | 718 | 1,309 | 82.3% | 858 | 1,020 | 18.9% |
| Canada | 1,883 | 898 | -52.3% | 807 | 627 | -22.3% |
| Guatemala | 674 | 890 | 32.0% | 487 | 536 | 10.1% |
| Costa Rica | 812 | 774 | -4.7% | 436 | 339 | -22.2% |
| Panama | 501 | 564 | 12.6% | 385 | 313 | -18.7% |
| South Korea | 575 | 468 | -18.6% | 72 | 22 | -69.4% |
| Colombia | 303 | 465 | 53.5% | 185 | 202 | 9.2% |
| China | 404 | 462 | 14.4% | 462 | 0 | -100.0% |
| Peru | 339 | 378 | 11.5% | 169 | 252 | 49.1% |
| Honduras | 74 | 140 | 89.2% | 75 | 41 | -45.3% |
| El Salvador | 49 | 137 | 179.6% | 56 | 35 | -37.5% |
| Brazil | 324 | 91 | -71.9% | 0 | 252 | - |
| Netherlands | 83 | 65 | -21.7% | 65 | 0 | -100.0% |
| Others | 254 | 158 | -37.8% | 133 | 47 | -64.7% |

Source: Trade Data Monitor, LLC

Table 10: Orange Export Value to the World (USD)

| Commodity: 080510, Oranges, Fresh | | | | | | |
|--|---------------------------------|---------------------------------|--------------------------|--------------------------------------|--------------------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 79,979,007 | 81,464,712 | 1.9% | 67,108,008 | 52,722,279 | -21.4% |
| United States | 62,933,033 | 72,199,621 | 14.7% | 61,694,532 | 48,113,364 | -22.0% |
| Ecuador | 1,298,854 | 1,809,162 | 39.3% | 938,723 | 654,851 | -30.2% |
| Dominican Republic | 962,585 | 1,567,486 | 62.8% | 1,036,851 | 1,231,680 | 18.8% |
| Guatemala | 3,798,705 | 1,008,850 | -73.4% | 550,160 | 586,763 | 6.7% |
| Costa Rica | 1,042,943 | 840,955 | -19.4% | 480,918 | 371,177 | -22.8% |
| Canada | 1,735,086 | 706,587 | -59.3% | 621,375 | 468,252 | -24.6% |
| Panama | 5,385,340 | 642,788 | -88.1% | 447,586 | 363,819 | -18.7% |
| Colombia | 393,875 | 581,103 | 47.5% | 219,717 | 210,543 | -4.2% |
| South Korea | 758,141 | 549,065 | -27.6% | 78,829 | 23,973 | -69.6% |
| China | 461,669 | 499,222 | 8.1% | 499,222 | 0 | -100.0% |
| Peru | 434,590 | 471,162 | 8.4% | 208,944 | 318,049 | 52.2% |
| El Salvador | 65,600 | 166,276 | 153.5% | 68,896 | 42,370 | -38.5% |
| Honduras | 85,653 | 153,460 | 79.2% | 86,660 | 41,360 | -52.3% |
| Brazil | 351,485 | 77,820 | -77.9% | 0 | 240,360 | - |
| Spain | 51,115 | 59,884 | 17.2% | 59,884 | 0 | -100.0% |
| Others | 220,333 | 131,271 | -40.4% | 115,711 | 55,718 | -51.8% |

Source: Trade Data Monitor, LLC

In MY 2020/21, Chile imported 3,107 MT of oranges. The United States was the main supplier of oranges, with 96 percent market share and totaling 2,983 metric tons. Chile imported the remaining four percent of oranges from Argentina and Peru (Table 9). In MY 2021/22 (data until September), orange imports decreased by 72.2 percent. However, the peak import season is during the summer months in Chile, between December and May, so year-end volumes may still be in line with previous seasons.

Table 11: Orange Import Volume from the World (MT)

| Commodity: 080510, Oranges, Fresh | | | | | | |
|-----------------------------------|-----------------|-----------------|---------------|----------------------|----------------------|---------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 3,726 | 3,107 | -16.6% | 1,413 | 407 | -71.2% |
| United States | 3,726 | 2,983 | -19.9% | 1,353 | 344 | -74.6% |
| Argentina | 0 | 105 | - | 42 | 63 | 50.0% |
| Peru | 0 | 18 | - | 17 | 0 | -100.0% |

Source: Trade Data Monitor, LLC

Table 12: Orange Import Value from the World (USD)

| Commodity: 080510, Oranges, Fresh | | | | | | |
|-----------------------------------|------------------|------------------|---------------|-----------------------|-----------------------|---------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 4,834,372 | 4,254,914 | -12.0% | 1,981,375 | 624,648 | -68.5% |
| United States | 4,834,325 | 4,132,078 | -14.5% | 1,923,114 | 566,972 | -70.5% |
| Argentina | 0 | 85,740 | - | 33,246 | 52,099 | 56.7% |
| Peru | 0 | 33,944 | - | 25,016 | 5,576 | -77.7% |

Source: Trade Data Monitor, LLC

Policy:

No new policy developments to report.

Commodities:

Tangerines/Mandarins, Fresh

Table 13: Production, Supply and Distribution

| Tangerines/Mandarins, Fresh Market Year Begins | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2021 | | Jan 2022 | | Jan 2023 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Chile | | | | | | |
| Area Planted (HECTARES) | 0 | 11194 | 0 | 12500 | 0 | 13500 |
| Area Harvested (HECTARES) | 0 | 10800 | 0 | 12000 | 0 | 13000 |
| Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total No. Of Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1000 MT) | 0 | 230 | 0 | 170 | 0 | 237 |
| Imports (1000 MT) | 0 | 1 | 0 | 1 | 0 | 1 |
| Total Supply (1000 MT) | 0 | 231 | 0 | 171 | 0 | 238 |
| Exports (1000 MT) | 0 | 194 | 0 | 144 | 0 | 200 |
| Fresh Dom. Consumption (1000 MT) | 0 | 35 | 0 | 25 | 0 | 35 |
| For Processing (1000 MT) | 0 | 2 | 0 | 2 | 0 | 3 |
| Total Distribution (1000 MT) | 0 | 231 | 0 | 171 | 0 | 238 |
| | | | | | | |

(HECTARES), (1000 TREES), (1000 MT)

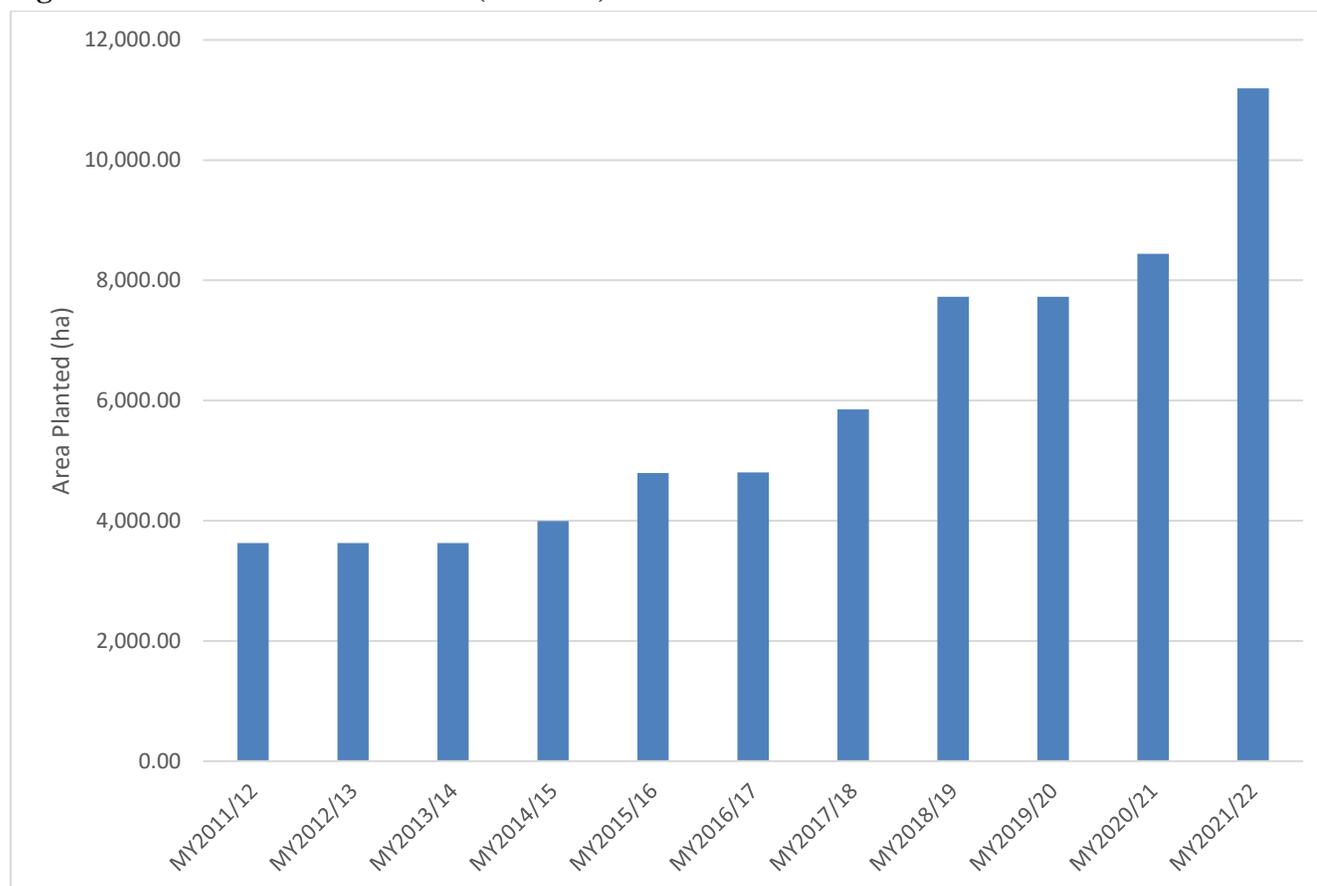
Source: Post Estimates

Production:

In MY 2022/23, Post projects that mandarin production (includes mandarins, clementines and tangerines) will increase by 39.4 percent considering an increase in area planted and assuming standard yields with no adverse climatic events that could hinder production. In MY 2021/22, Post estimates that mandarin production will total 170,000 MT, a 26.1 percent decrease over MY 2020/21 due to frost in the production area.

In MY 2021/22, mandarin area planted totaled 11,194 hectares, a 32.6 percent increase over MY 2020/21 (Figure 5). Due to high profits, mandarin area planted increased significantly in the past ten marketing years. Specifically, the W. Murcott variety became a viable alternative to replace other crops such as oranges or table grapes, which are less profitable than mandarins, or avocados, which are very sensitive to frost (Figure 6). Besides W. Murcott, Chilean producers are planting new mandarin varieties like Orogrande, Clemenules, and Tango which will allow producers to expand the harvest season and to diversify export markets.

Figure 5: Mandarin Area Planted (hectares)



Source: ODEPA, 2022

Post projects mandarin area planted to increase nearly 1,000 hectares per year and reach 13,500 hectares in MY 2022/23. The *Coquimbo* region is the top mandarin production region in Chile, holding 5,309 hectares, which represents 47.4 percent of area planted (Table 14). The *O'Higgins* and the *Valparaiso* regions, in the central part of the country, hold 21.9 percent and 20.7 percent of the area planted, respectively. Area planted in all mandarin producing regions grew in the past three marketing years.

Table 14: Tangerine/Mandarin Area Planted by Region MY 2021/22 (hectares)

| Region | Area Planted (ha) | Variation* (%) | Share (%) |
|---------------|-------------------|----------------|---------------|
| Atacama | 89 | 23.9% | 0.8% |
| Coquimbo | 5,309 | 40.3% | 47.4% |
| Valparaíso | 2,321 | 21.5% | 20.7% |
| Metropolitana | 1,005 | 43.7% | 9.0% |
| O'Higgins | 2,454 | 97.0% | 21.9% |
| Others | 16 | | 0.1% |
| Total | 11,194 | 44.9% | 100.0% |

*Variation of planted area is measured every third year; data provided are last available

Source: Based on data from ODEPA

Figure 6: Mandarin Production in the Coquimbo region



Mandarin production on a hillside next to a table grape orchard in Ovalle, Coquimbo region.



Mandarin production in Ovalle, Coquimbo region. Production requires the use of drip irrigation, to increase efficiency and to reach steep areas.

Source: FAS Staff

Consumption:

In MY 2022/23, Post projects domestic consumption at 38,000 MT, of which 35,000 MT or 92 percent will be fresh domestic consumption, and the remaining 3,000 MT or eight percent for processing. In MY 2021/22, Post estimates that domestic consumption will decrease by 27.0 percent and total 27,000 MT, due to lower production.

Chilean mandarin producers export around 84 percent of commercial production, with the remaining 16 percent going to domestic consumption. More than 90 percent of domestic consumption is fresh fruit, and less than ten percent is used for processing. Processed mandarins are used mostly for juice.

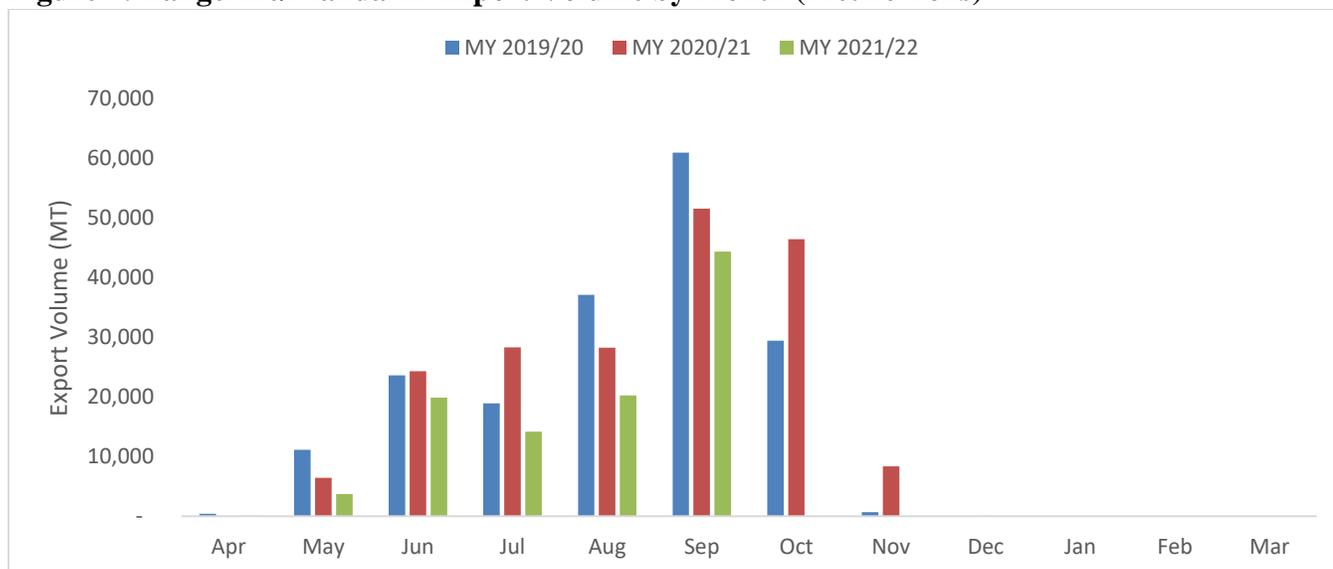
Trade:

In MY 2022/23, Post projects that exports will increase by 38.9 percent totaling 200,000 MT due to an increase in planted area and a return to normal yields. In MY 2021/22, Post estimates mandarin exports to decrease by 25.8 percent to 144,00 MT due to lower production.

In Chile, the mandarin marketing year starts April with the beginning of the harvest season. Chile exports mandarins from April until December (Figure 6). However, Chilean producers export most mandarins between August and October, peaking in September each year. MY 2021/22 exports have been lower during the peak export months because of lower production. Post does not expect a full recovery in exports in the remainder of the marketing year.

In MY 2020/21, Chile exported 193,821 MT of mandarins to the world, a 6.3 percent increase over MY 2019/20 (Table 15). The top export market for mandarins is the United States. In MY 2020/21, Chile exported 183,957 MT to the United States, which represented 94.9 percent of exports. Other markets for Chilean mandarins are Canada, the United Kingdom and Puerto Rico, although volumes exported to these markets are much lower.

Figure 7: Tangerine/Mandarin Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 15: Tangerine/Mandarin Export Volume to the World (MT)

| Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines and Satsumas); Clementines, Wilkings and Similar Citrus Hybrids, Fresh or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids | | | | | | |
|---|----------------------------|----------------------------|--------------------------|-------------------------------------|-------------------------------------|----------------------|
| Partner Country | Marketing Year | | | Year to Date | | |
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 182,337 | 193,821 | 6.3% | 138,992 | 102,553 | -26.2% |
| United States | 172,286 | 183,957 | 6.8% | 133,385 | 100,866 | -24.4% |
| Canada | 3,561 | 2,867 | -19.5% | 1,066 | 321 | -69.9% |
| United Kingdom | 1,632 | 2,795 | 71.3% | 1,615 | 43 | -97.3% |
| Puerto Rico | 776 | 951 | 22.6% | 797 | 624 | -21.7% |
| Netherlands | 814 | 946 | 16.2% | 618 | 23 | -96.3% |
| Dominican Republic | 340 | 599 | 76.2% | 413 | 414 | 0.2% |
| China | 1,141 | 508 | -55.5% | 466 | 0 | -100.0% |
| Russia | 207 | 385 | 86.0% | 230 | 0 | -100.0% |
| India | 0 | 222 | | 71 | 0 | -100.0% |
| Panama | 209 | 157 | -24.9% | 112 | 0 | -100.0% |
| Germany | 203 | 148 | -27.1% | 86 | 0 | -100.0% |
| Guatemala | 44 | 60 | 36.4% | 4 | 0 | -100.0% |
| Costa Rica | 52 | 53 | 1.9% | 25 | 44 | 76.0% |
| Japan | 79 | 48 | -39.2% | 48 | 30 | -37.5% |
| Honduras | 36 | 42 | 16.7% | 17 | 0 | -100.0% |
| Others | 957 | 83 | -91.3% | 39 | 188 | 382.1% |

Source: Trade Data Monitor, LLC

Table 16: Tangerine/Mandarin Export Value to the World (USD)

| Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines and Satsumas); Clementines, Wilkings and Similar Citrus Hybrids, Fresh or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids | | | | | | |
|---|-----------------------------|-----------------------------|--------------------------|--------------------------------------|--------------------------------------|----------------------|
| Partner Country | Marketing year | | | Year to Date | | |
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 194,753,137 | 188,316,168 | -3.3% | 133,498,037 | 90,882,902 | -31.9% |
| United States | 181,077,795 | 177,138,540 | -2.2% | 127,224,233 | 88,719,499 | -30.3% |
| United Kingdom | 2,246,939 | 3,301,749 | 46.9% | 1,782,832 | 56,977 | -96.8% |
| Canada | 4,704,787 | 2,543,531 | -45.9% | 727,823 | 146,749 | -79.8% |
| Puerto Rico | 1,355,285 | 1,558,795 | 15.0% | 1,311,517 | 1,042,841 | -20.5% |
| Netherlands | 848,387 | 1,078,473 | 27.1% | 734,350 | 16,932 | -97.7% |
| Dominican Republic | 585,227 | 897,967 | 53.4% | 627,902 | 642,750 | 2.4% |
| China | 1,486,230 | 507,450 | -65.9% | 467,586 | 0 | -100.0% |
| Russia | 163,509 | 373,458 | 128.4% | 211,142 | 0 | -100.0% |
| India | 0 | 183,397 | | 53,657 | 0 | -100.0% |
| Germany | 308,007 | 181,491 | -41.1% | 101,062 | 0 | -100.0% |
| Panama | 299,203 | 149,106 | -50.2% | 87,497 | 0 | -100.0% |
| Guatemala | 64,336 | 85,402 | 32.7% | 6,234 | 0 | -100.0% |
| Costa Rica | 76,918 | 76,361 | -0.7% | 29,528 | 62,151 | 110.5% |
| Japan | 123,982 | 76,193 | -38.5% | 76,193 | 43,128 | -43.4% |
| Honduras | 56,080 | 64,516 | 15.0% | 25,392 | 0 | -100.0% |
| Others | 1,356,452 | 99,739 | -92.6% | 31,089 | 151,875 | 388.5% |

Source: Trade Data Monitor, LLC

Chilean import volume of mandarins is low compared to exports. In MY 2020/21, Chile imported 588 MT of mandarins, and 51.8 percent of those came from the United States. The remaining 48.2 percent came from Peru (Table 17).

Table 17: Tangerine/Mandarin Import Volume from the World (MT)

Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines and Satsumas); Clementines, Wilkings and Similar Citrus Hybrids, Fresh or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids

| Partner Country | Marketing Year | | | Year to Date | | |
|-----------------|--------------------|--------------------|------------------|----------------------------|----------------------------|---------------|
| | MY 2019/20 (MT) | MY 2020/21 (MT) | Variation (%) | Apr 21 - Sep 21 (MT) | Apr 22 - Sep 22 (MT) | Variation (%) |
| The World | 695 | 588 | -15.4% | 487 | 198 | -59.3% |
| United States | 532 | 305 | -42.7% | 204 | 88 | -56.9% |
| Peru | 141 | 283 | 100.7% | 283 | 110 | -61.1% |
| Spain | 0 | 0 | 0 | 0 | 0 | 0 |
| Colombia | 0 | 0 | 0 | 0 | 0 | 0 |
| Confidential | 0 | 0 | 0 | 0 | 0 | 0 |
| Ecuador | 22 | 0 | -100.0% | 0 | 0 | 0 |

Source: Trade Data Monitor, LLC

Table 18: Tangerine/Mandarin Import Value from the World (USD)

Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines and Satsumas); Clementines, Wilkings and Similar Citrus Hybrids, Fresh or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids

| Partner Country | Marketing Year | | | Year to Date | | |
|-----------------|---------------------|---------------------|------------------|-----------------------------|-----------------------------|---------------|
| | MY 2019/20 (USD) | MY 2020/21 (USD) | Variation (%) | Apr 21 - Sep 21 (USD) | Apr 22 - Sep 22 (USD) | Variation (%) |
| The World | 1,313,236 | 977,282 | -25.6% | 664,784 | 332,005 | -50.1% |
| United States | 1,133,250 | 632,736 | -44.2% | 320,237 | 209,355 | -34.6% |
| Peru | 153,701 | 344,546 | 124.2% | 344,546 | 122,650 | -64.4% |
| Spain | 0 | 0 | 0 | 0 | 0 | 0 |
| Colombia | 40 | 0 | -100.0% | 0 | 0 | 0 |
| Confidential | 2,160 | 0 | -100.0% | 0 | 0 | 0 |
| Ecuador | 24,084 | 0 | -100.0% | 0 | 0 | 0 |

Source: Trade Data Monitor, LLC

Policy:

No new policy developments to report.

Attachments:

No Attachments