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Report Name: Citrus Annual

Country: Chile

Post: Santiago

Report Category: Citrus

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Report Highlights:

In marketing year (MY) 2024/25, due to the increase in area planted and assuming regular yields, Post estimates that lemon production will grow by 2.6 percent, reaching 197,000 metric tons (MT). Chilean lemon exports will increase 3.3 percent, totaling 93,000 metric tons. In MY 2024/25, Post estimates orange production will increase by 2.2 percent and total 190,000 metric tons, due to higher orange area planted and assuming regular yields. Orange exports will follow and increase by 3.0 percent totaling 103,000 metric tons. In MY 2024/25, mandarin production will increase by 13.1 percent and total 250,000 metric tons due to higher area planted. Likewise, mandarin exports will reach to 218,000 MT which represents a 14.1 percent increase from MY 2023/24.

Commodities:
Lemons, Fresh

Table 1: Production, Supply and Distribution

Lemons/Limes, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	8081	9310	8150	9926	0	10400
Area Harvested (HECTARES)	8000	8500	8050	8800	0	9000
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)	164	164	175	192	0	197
Imports (1000 MT)	13	13	10	8	0	8
Total Supply (1000 MT)	177	177	185	200	0	205
Exports (1000 MT)	68	68	74	90	0	93
Fresh Dom. Consumption (1000 MT)	99	99	100	100	0	101
For Processing (1000 MT)	10	10	11	10	0	11
Total Distribution (1000 MT)	177	177	185	200	0	205
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

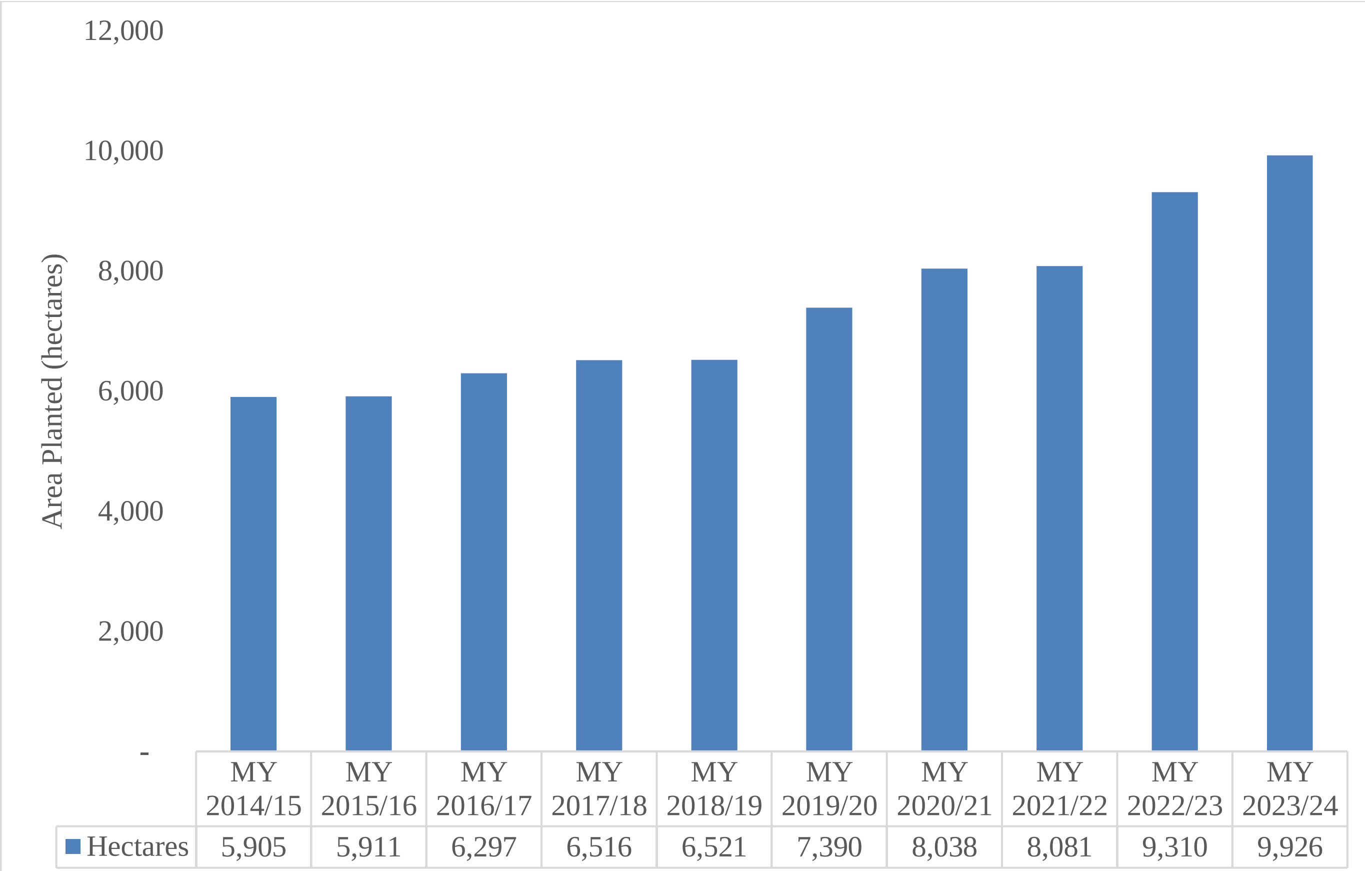
Production:

In MY 2024/25, due to the increase in area planted and assuming regular yields, Post estimates that lemon production will grow by 2.6 percent, reaching 197,000 metric tons. The area planted with lemons is expected to reach 10,400 hectares (ha) in MY 2024/25, representing a 4.8 percent increase from MY 2023/24 (Figure 1). Farmers have found lemon production and exports to be a profitable alternative to other crops, such as avocados, due to higher prices and lower water requirements. The area planted with lemons in Chile has grown consistently over the past 10 marketing years.

Lemon production spans from the *Coquimbo* region in the northern part of the country to the *O'Higgins* region towards Chile's central-south (Map 1). However, over 40 percent of the area planted is in the *Metropolitana* region, in the central part of Chile (Table 2). The lemon area planted grew in all producing regions except *O'Higgins* where it decreased by 2.1 percent.

The Chilean lemon harvest begins in April. During the Chilean winter, from June to September, international prices exceed domestic prices, prompting most Chilean producers to export lemons to North America, Europe, and Asia. During the summer months, from December to March, when the production volume decreases and domestic prices are high, Chilean lemon production is sold in the domestic market.

Figure 1: Lemon Area Planted (hectares)



Source: ODEPA, 2024

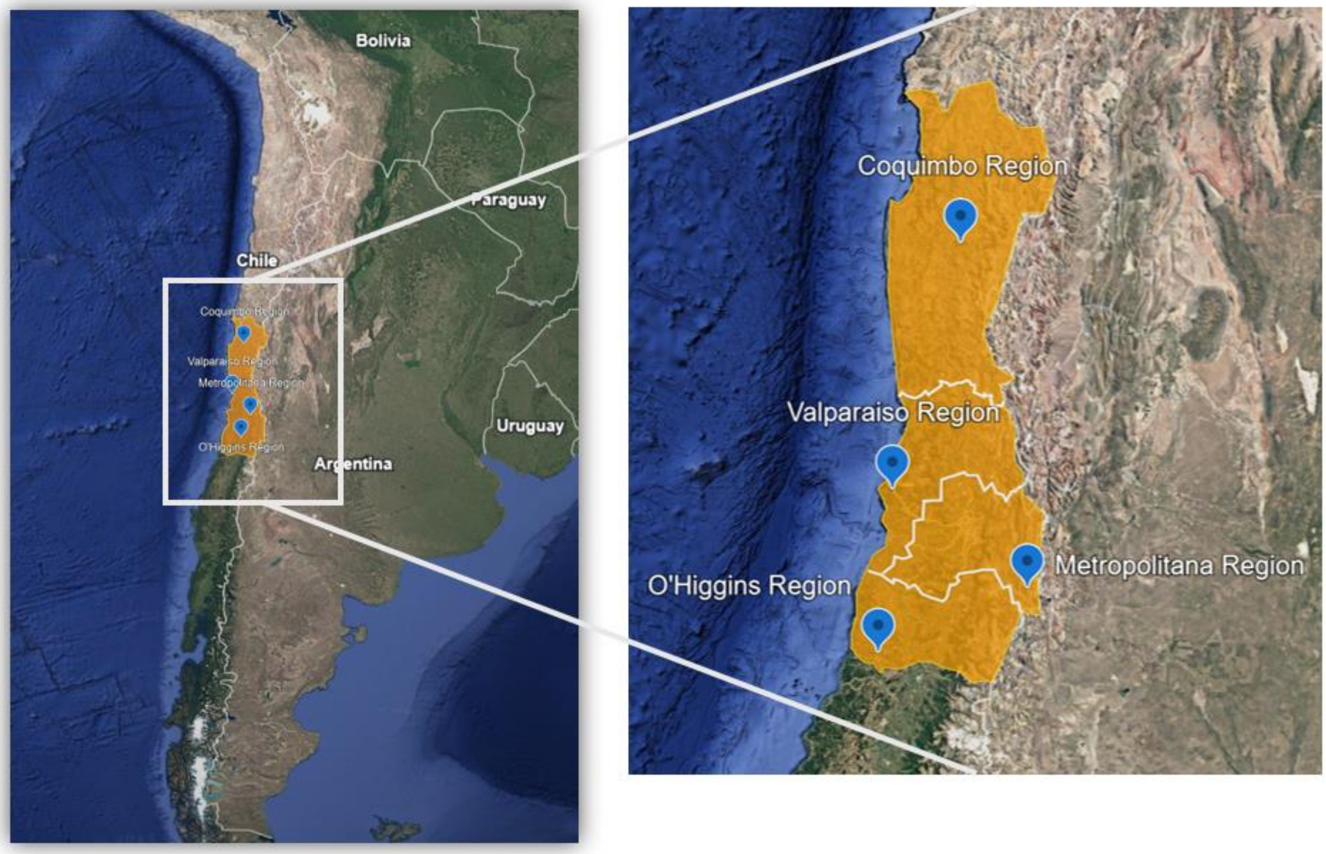
Table 2: Lemon Area Planted by Region MY 2023/24 (hectares)

Region	**Area Planted (ha)**	**Variation* (%)**	**Share (%)**
Coquimbo	2,145	31.7%	21.6%
Valparaíso	2,543	25.8%	25.6%
Metropolitana	4,010	21.4%	40.4%
O'Higgins	962	-2.1%	9.7%
Others	266	-	2.7%
Total	**9,926**	**23.5%**	**100.0%**

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

Source: Based on data from ODEPA

Map 1: Citrus Production Area



Source: FAS Santiago using Google Earth

Consumption:

In MY 2024/25, Post estimates that domestic consumption of lemons will increase by one percent to 101,000 MT, driven by population growth. Domestic lemon consumption represents 51 percent of commercial production. Fresh lemon consumption peaks in the Chilean summer, between December and March, due to the increase in consumption of salads and summer beverages that use fresh lemons in their preparations. During this time, domestic supply decreases and lemon imports increase to cover consumption needs.

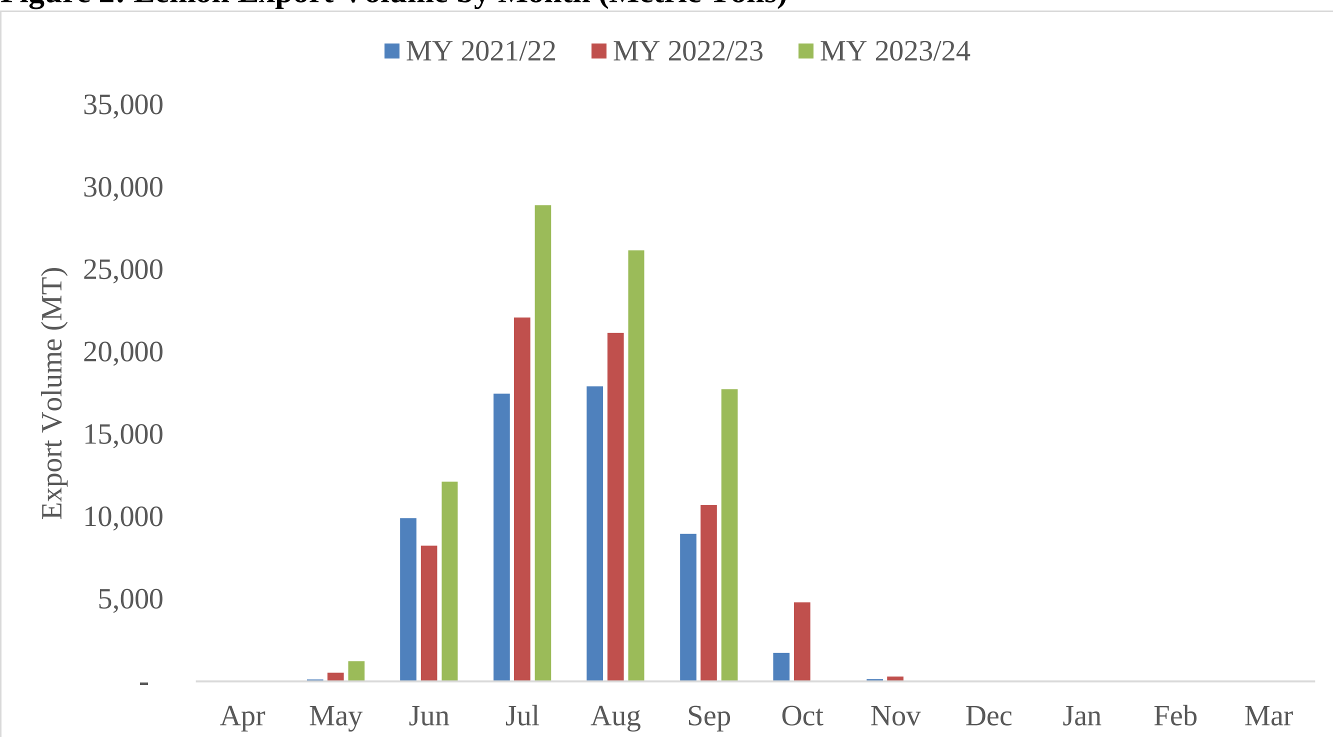
In MY 2024/25, the consumption of lemons for processing is projected to total 11,000 MT, a 10 percent increase over MY 2023/24. This growth in processing follows the increase in production volume. Lemons are processed to produce juice, essential oils, and concentrates for confectionery.

Trade:

In MY 2024/25, due to an increase in production, Post estimates that exports will increase by 3.3 percent, reaching 93,000 metric tons (MT). The top market for Chilean lemons is the United States. In MY 2023/24 (data until September), Chile exported 65 percent of its lemon export volume to the United States (Table 3). Other top markets for Chilean lemons in MY 2023/24 included Japan, South Korea, and the Netherlands. In MY 2023/24 (data until September), exports increased 37.4 percent over the previous year, due favorable climatic conditions in the *Metropolitana* and *Valparaíso* regions which boosted production volume.

In Chile, the lemon marketing year starts in April with the beginning of the harvest season. The bulk of exports takes place between June and September each year, peaking in July or August depending on climatic and market conditions (see Figure 2).

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



Source: Trade Data Monitor, LLC

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 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	56,217	67,794	20.6%	62,709	86,173	37.4%
United States	31,222	41,672	33.5%	37,736	55,979	48.3%
Japan	15,578	17,076	9.6%	16,656	18,420	10.6%
South Korea	4,423	5,593	26.5%	4,978	7,439	49.4%
Netherlands	901	1,634	81.4%	1,634	1,707	4.5%
Italy	209	576	175.6%	576	432	-25.0%
Spain	689	432	-37.3%	432	480	11.1%
Austria	0	288		288	599	108.0%
China	1,558	124	-92.0%	99	74	-25.3%
Dominican Republic	54	97	79.6%	62	33	-46.8%
Colombia	58	93	60.3%	74	65	-12.2%
Others	1,525	209	-86.3%	174	945	443.1%

Source: Trade Data Monitor, LLC

In MY 2022/23, Chile imported 13,200 MT of lemons. The top supplier of lemons is Peru, followed by Brazil, Colombia, and the United States (Table 3). Lemon imports from Brazil have grown consistently since MY 2020/21 and represented 30.6 percent of import volume in MY 2022/23.

Table 4: 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 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	12,267	13,200	7.6%	5,645	5,798	2.7%
Peru	8,567	7,837	-8.5%	3,575	4,040	13.0%
Brazil	3,057	4,035	32.0%	1,264	1,182	-6.5%
Colombia	500	1,177	135.4%	804	575	-28.5%
United States	142	149	4.9%	0	0	
Others	1	2	100.0%	2	1	-50.0%

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Commodities:

Oranges, Fresh

Table 5: Production, Supply and Distribution

Oranges, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	6362	6702	6300	7198	0	7300
Area Harvested (HECTARES)	6200	6200	6150	6500	0	6800
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)	180	180	177	186	0	190
Imports (1000 MT)	1	1	2	1	0	1
Total Supply (1000 MT)	181	181	179	187	0	191
Exports (1000 MT)	95	95	92	100	0	103
Fresh Dom. Consumption (1000 MT)	75	75	76	76	0	77
For Processing (1000 MT)	11	11	11	11	0	11
Total Distribution (1000 MT)	181	181	179	187	0	191
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

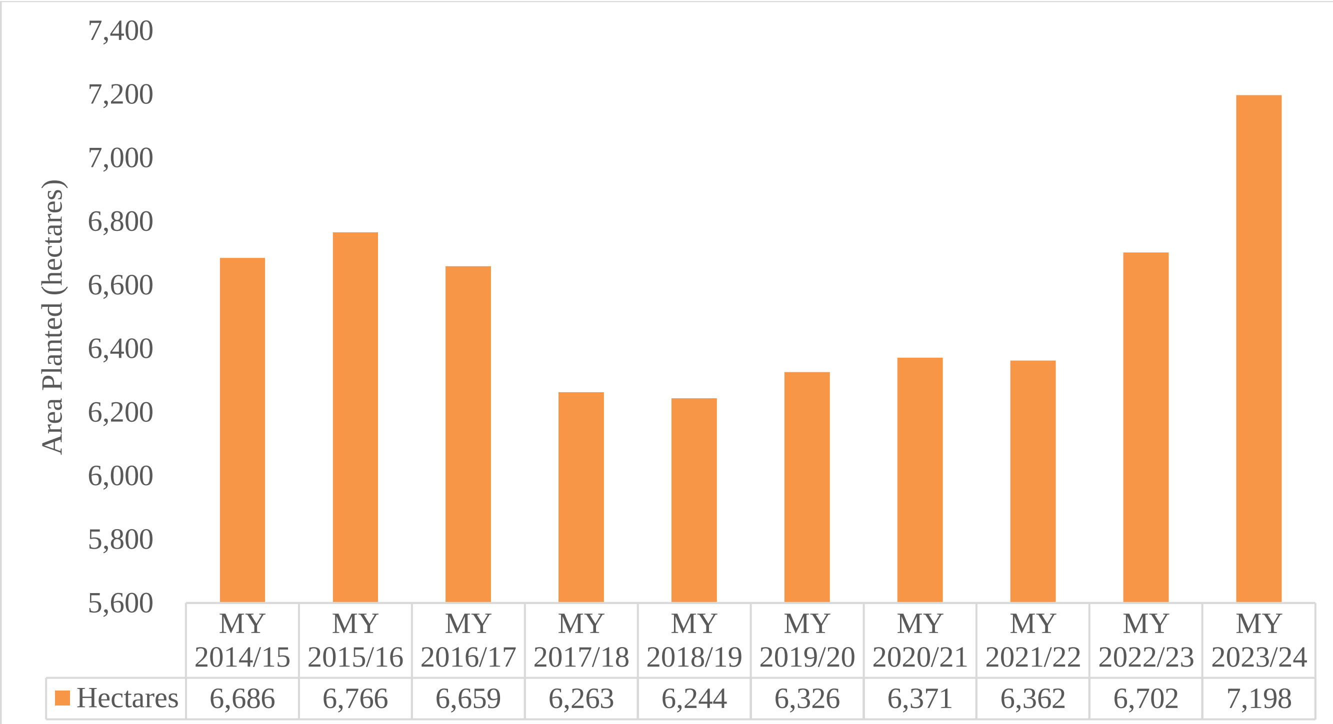
Production:

In MY 2024/25, orange production will increase by 2.2 percent and total 190,000 MT, assuming high yields and a 1.4 percent growth in area planted to 7,300 hectares. The area planted with oranges has grown significantly since MY 2021/22 due to expansion in the main production regions, *O'Higgins* and *Metropolitana*. In MY 2023/24, the orange area planted increased by 13 percent over a period of three years (see Figure 3).

The *Metropolitana* and the *O'Higgins* regions, in the central part of the country, are the top orange producing regions, holding over 70 percent of the orange area planted in Chile (Table 6). Area planted in the *Metropolitana* and the *O'Higgins* regions increased in the past three marketing years by 14.0 percent and 20.3 percent, respectively. According to Post sources, orange production complements the lemon and mandarin production, by expanding the harvest season which helps maintain harvest operations and export flow. Orange production in these two regions has enough water availability for irrigation.

The *Coquimbo* and *Valparaíso* regions hold near 30 percent of the area planted. In these two regions, due to drought, area planted with oranges has gradually decreased as producers shifted to lemons because of their higher profitability.

Figure 3: Oranges Area Planted (hectares)



Source: ODEPA, 2024

Table 6: Orange Area Planted by Region MY 2023/24 (hectares)

Region	Area Planted (ha)	Variation* (%)	Share (%)
Coquimbo	586	-2.9%	8.1%
Valparaíso	1,175	-0.9%	16.3%
Metropolitana	2,857	14.0%	39.7%
O'Higgins	2,402	20.3%	33.4%
Others	177.52	-	2.5%
Total	**7,198**	**13.0%**	**100.0%**

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

Source: Based on data from ODEPA

Consumption:

Orange consumption contains fresh domestic consumption and processing for orange juice. Most oranges are consumed fresh and they are a common fruit in households, especially during the Chilean winter (July to September) when production peaks. In MY 2024/25, fresh domestic consumption will increase by 1.3 percent to 77,000 MT, following population growth.

Post estimates MY 2024/25 consumption for processing, at 11,000 MT, unchanged from the previous marketing year. In MY 2024/25, total domestic consumption, fresh and for processing, will reach 88,000 MT, which represents 46.3 percent of commercial production.

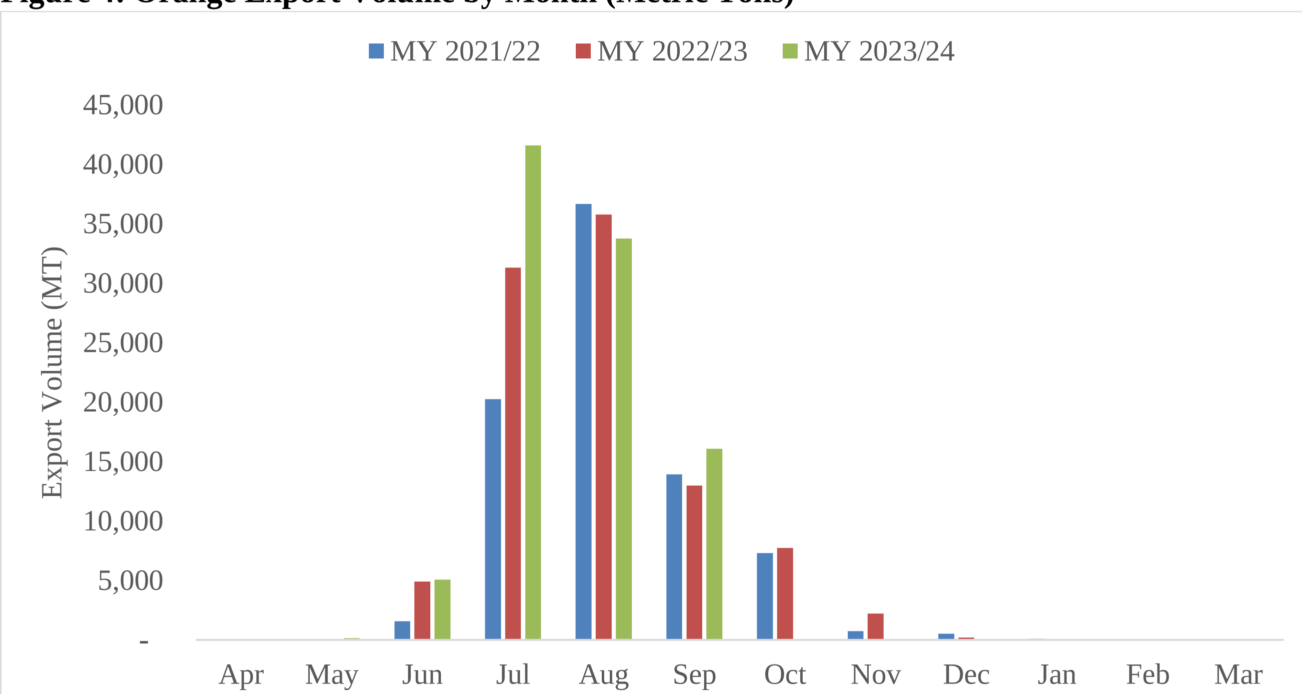
Trade:

In MY 2024/25, Post estimates exports to increase by 3.0 percent and total 103,000 MT due to an increase in production. In Chile, the orange marketing year starts April with the beginning of the harvest season. The bulk of Chilean orange exports is between July and September each year and peaks around August (Figure 6).

In MY 2023/24 (data until September), orange exports increased by 13.7 percent from MY 2022/23 and totaled 96,591 MT (Table 7). The top market for Chilean oranges is the United States. In MY 2023/24, orange exports to the United States reached 91,349 MT which represented 95 percent of the export volume. Chile exports oranges to various other countries such as Ecuador, the Dominican Republic, and Brazil.

In MY 2023/24 (data until September), Chile imported 632 MT of oranges, a 70.8 percent increase from MY 2022/23 (Table 8). This big percentage increase corresponds to a normalization in imports, since MY 2022/23 was a year of low import volumes. The United States was the top supplier of oranges, with 99 percent market share. The peak import season is during the Chilean summer, between December and May.

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



Source: Trade Data Monitor, LLC

Table 7: Orange Export Volume to the World (MT)

Commodity: 080510, Oranges, Fresh						
Partner Country	**Marketing Year**			**Year to Date**		
	MY 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	81,062	95,118	17.3%	84,953	96,591	13.7%
United States	73,916	85,461	15.6%	78,964	91,349	15.7%
Ecuador	1,258	1,587	26.2%	1,011	1,088	7.6%
Dominican Republic	1,559	1,546	-0.8%	1,061	1,147	8.1%
Brazil	621	1,104	77.8%	378	224	-40.7%
Canada	670	1,100	64.2%	1,049	149	-85.8%
Guatemala	644	1,014	57.5%	702	1,251	78.2%
Costa Rica	638	701	9.9%	515	348	-32.4%
Panama	536	580	8.2%	397	396	-0.3%
Netherlands	0	537		105	99	-5.7%
South Korea	209	453	116.7%	96	0	-100.0%
Others	1,011	1,035	2.4%	675	540	-20.0%

Source: Trade Data Monitor, LLC

Table 8: Orange Import Volume from the World (MT)

Commodity: 080510, Oranges, Fresh						
Partner Country	**Marketing Year**			**Year to Date**		
	MY 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	1,704	1,396	-18.1%	370	632	70.8%
United States	1,555	1,395	-10.3%	369	548	48.5%
Peru	0	1		1	0	-100.0%
Others	149	-		-	84	

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Commodities:
Tangerines/Mandarins, Fresh

Table 9: Production, Supply and Distribution

Tangerines/Mandarins, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	11184	11835	12000	12404	0	12700
Area Harvested (HECTARES)	11000	11000	11800	11800	0	12200
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)	268	268	242	221	0	250
Imports (1000 MT)	1	1	1	1	0	1
Total Supply (1000 MT)	269	269	243	222	0	251
Exports (1000 MT)	236	236	211	191	0	218
Fresh Dom. Consumption (1000 MT)	30	30	29	28	0	30
For Processing (1000 MT)	3	3	3	3	0	3
Total Distribution (1000 MT)	269	269	243	222	0	251
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

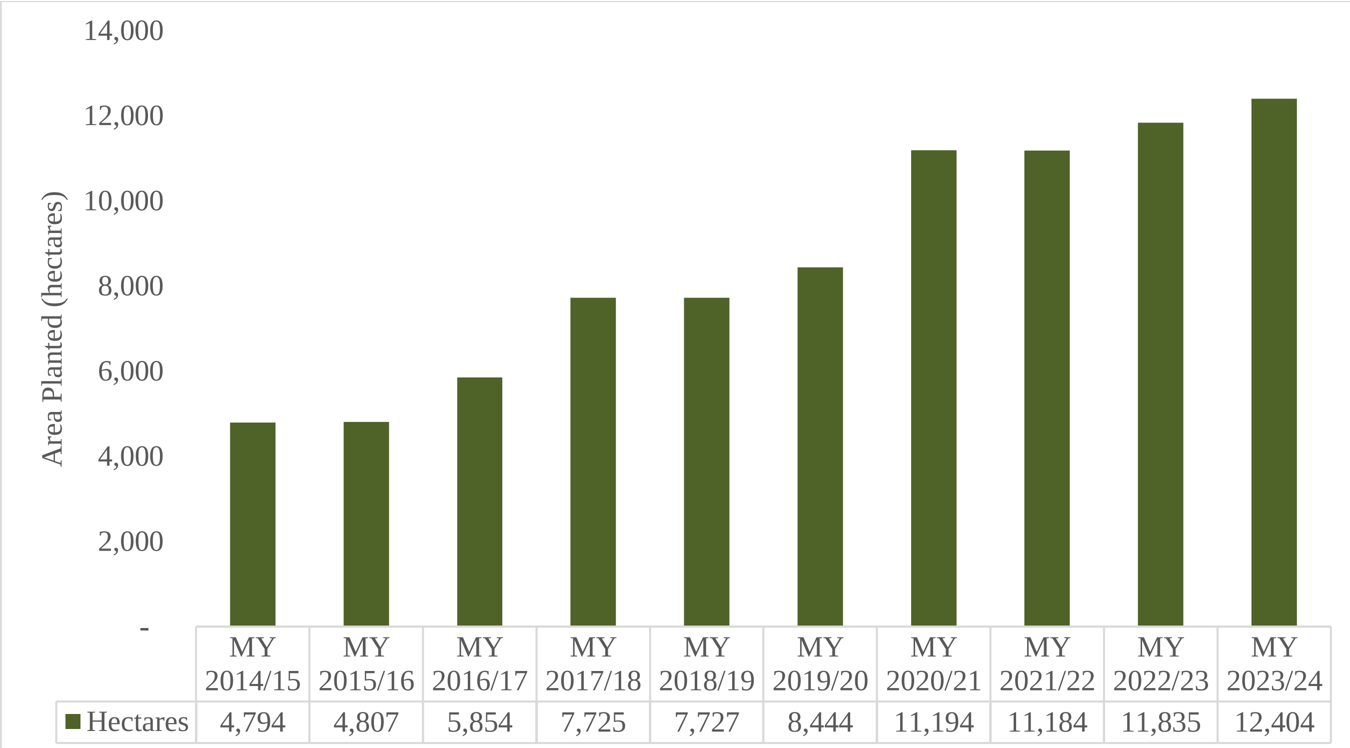
Production:

In MY 2024/25, Post projects that production will increase by 13.1 percent and total 250,000 metric tons (Table 9). This increase is based in an increase in mandarin area planted and assuming regular yields. In MY 2024/25, Post estimates that area planted with mandarins will reach 12,700 hectares, which represents a 4.8 percent increase from MY 2023/24.

Due to high profits, area planted in the *Metropolitana*, *O'Higgins* and the *Valparaiso* regions, in the central part of the country, grew significantly in the past three marketing years (Table 11). Mandarins became a profitable alternative for producers in these regions. For example, in the *Valparaiso* region, mandarin area planted has increased because of its adaptability to the terrain and climate. Producers have shifted from avocado crops, which are very sensitive to low temperatures and humidity, to mandarins, planting them in hillsides using drip irrigation (Figure 6).

MY 2023/24 had a winter with abundant rainfall. However, in the *Coquimbo* region, in the northern part of the country, drought persists, and water availability for irrigation is currently insufficient. The *Coquimbo* region is the top mandarin producing region in Chile, holding 42.2 percent of the area planted with mandarins. Thus, drought in that region has a large impact on Chile's mandarin production, and in MY 2023/24, production decreased by 17.5 percent. Moreover, due to drought in that region, area planted decreased by 1.3 percent in a three-year period (Table 11).

Figure 5: Mandarin Area Planted (hectares)



Source: ODEPA, 2024

Table 11: Tangerine/Mandarin Area Planted by Region MY 2023/24 (hectares)

Region	Area Planted (ha)	Variation* (%)	Share (%)
Coquimbo	5,240	-1.3%	42.2%
Valparaíso	2,576	11.0%	20.8%
Metropolitana	1,402	39.5%	11.3%
O'Higgins	3,000	22.2%	24.2%
Others	16		0.1%
Total	**12,404**	**10.8%**	**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 Aconcagua Valley, Valparaíso Region

Source: Pictures taken by FAS Santiago during a field visit.

Consumption:

In MY 2024/25, due to an increase in production, Post projects fresh domestic consumption will increase by 7.1 percent and total 30,000 metric tons. Mandarins are usually consumed fresh and consumption peaks during the harvest months from May to September, when availability increases and prices are competitive. Mandarin consumption for processing is mainly used in juice and will remain unchanged at 3,000 metric tons.

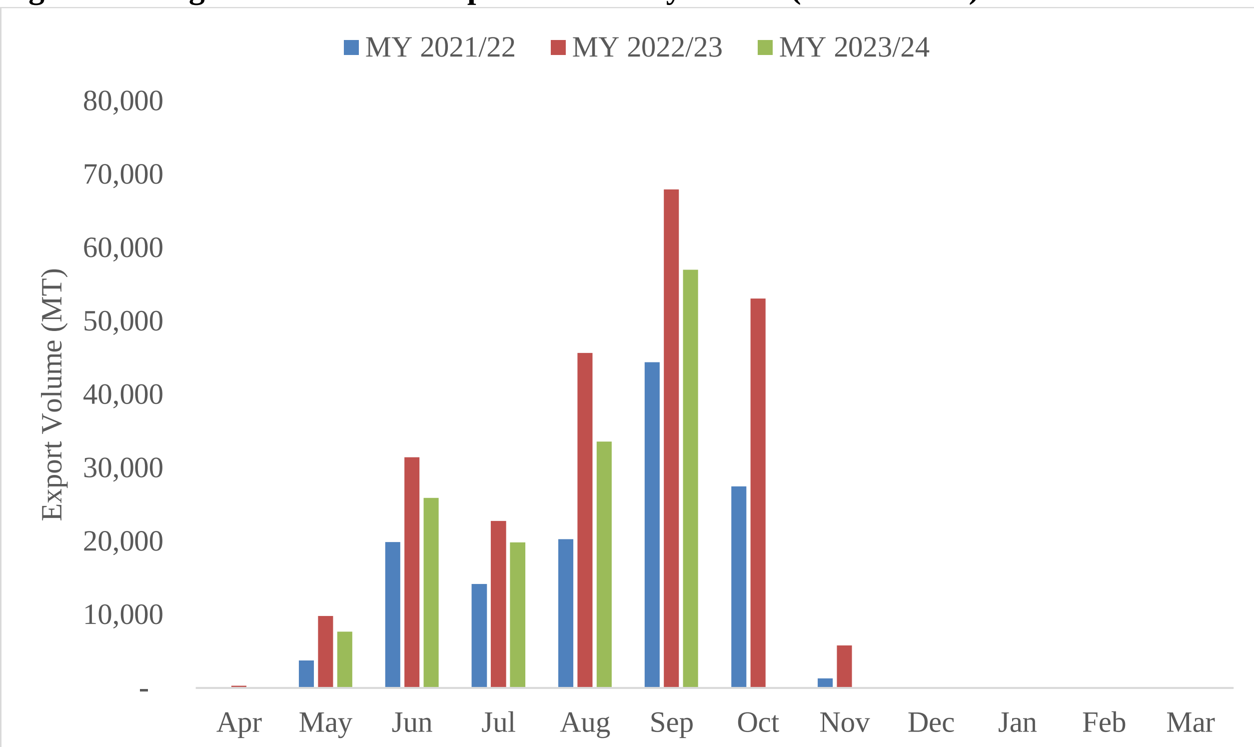
Trade:

In MY 2024/25, due to the decrease in production, Post estimates that exports will increase by 14.1 percent totaling 218,000 metric tons. In MY 2023/24 (data until September), the top export market for Chilean mandarin exports was the United States, which received 139,859 MT of the export volume which represents 97.1 percent of the export volume (Table 12). Other markets for Chilean mandarins are Canada, Spain, and Mexico.

Chile exports mandarins from May until December. However, Chilean mandarin exports peak around September each year (Figure 7). MY 2023/24 exports were lower during the peak export months because of low production volumes that resulted from drought in the *Coquimbo* region.

Chilean import volume of mandarins does not surpass 1,000 MT per year. In MY 2023/24 (data until September), Chile imported 210 MT of mandarins, a 56.5 percent decrease from the MY 2022/23. The United States is the top supplier of mandarins with a 68.6 percent market share (Table 13).

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



Source: Trade Data Monitor, LLC

Table 12: 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 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	131,363	236,907	80.3%	177,867	144,017	-19.0%
United States	128,468	223,532	74.0%	171,411	139,859	-18.4%
Canada	493	2,418	390.5%	834	238	-71.5%
Spain	179	1,805	908.4%	1,243	300	-75.9%
Mexico	0	1,802		826	1,250	51.3%
Russia	92	1,258	1267.4%	580	22	-96.2%
Netherlands	68	1,084	1494.1%	800	188	-76.5%
Puerto Rico	776	1,072	38.1%	875	846	-3.3%
United Kingdom	193	756	291.7%	32	155	384.4%
Dominican Republic	582	747	28.4%	272	230	-15.4%
Guatemala	28	388	1285.7%	145	119	-17.9%
Others	484	2,045	322.5%	849	810	-4.6%

Source: Trade Data Monitor, LLC

Table 13: 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 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Apr 23 - Sep 23 (MT)**	**Apr 24 - Sep 24 (MT)**	**Variation (%)**
_World	529	613	15.9%	483	210	-56.5%
United States	419	277	-33.9%	148	144	-2.7%
Peru	110	177	60.9%	177	66	-62.7%
Others	-	159		158	-	-100.0%

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Attachments:

No Attachments