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Report Name: Fresh Deciduous Fruit Annual

Country: Chile

Post: Santiago

Report Category: Fresh Deciduous Fruit

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Report Highlights:

In July 2024, USDA published the final notice allowing certain table grapes to be safely imported by the United States from parts of Chile. The new requirements will allow table grapes from areas of Chile where European grapevine moth is either absent or at a low prevalence and will also protect U.S. agriculture from Chilean false red mite. These requirements reduce the use of methyl bromide and will also serve to increase the competitiveness of Chilean table grapes. In Marketing Year (MY) 2024/25, Post estimates that table grape production will increase by 6.6 percent, totaling 723,000 metric tons (MT) due to high yields. Exports will increase by 7.8 percent and total 570,000 MT. For apples, MY 2024/25 production will reach 920,000 MT, a 0.7 percent increase driven by high yields. Exports will increase by one percent and total 507,000 MT. Chile's MY 2024/25 fresh pear production will increase by 2.5 percent, totaling 205,000 MT. Pear exports are projected to increase by 4.7 percent and total 104,700 MT.

Commodities:
Grapes, Table, Fresh

Table 1: Production, Supply and Distribution:

Grapes, Fresh Table	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	43025	43025	39931	39931	0	39000
Area Harvested (HA)	42000	42000	39500	39500	0	38500
Commercial Production (MT)	651500	651500	630000	678216	0	723000
Non-Comm. Production (MT)	4800	4800	5000	5000	0	5000
Production (MT)	656300	656300	635000	683216	0	728000
Imports (MT)	300	700	300	300	0	300
Total Supply (MT)	656600	657000	635300	683516	0	728300
Fresh Dom. Consumption (MT)	160300	160679	155300	155000	0	158300
Exports (MT)	496300	496321	480000	528516	0	570000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	656600	657000	635300	683516	0	728300
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

Production:

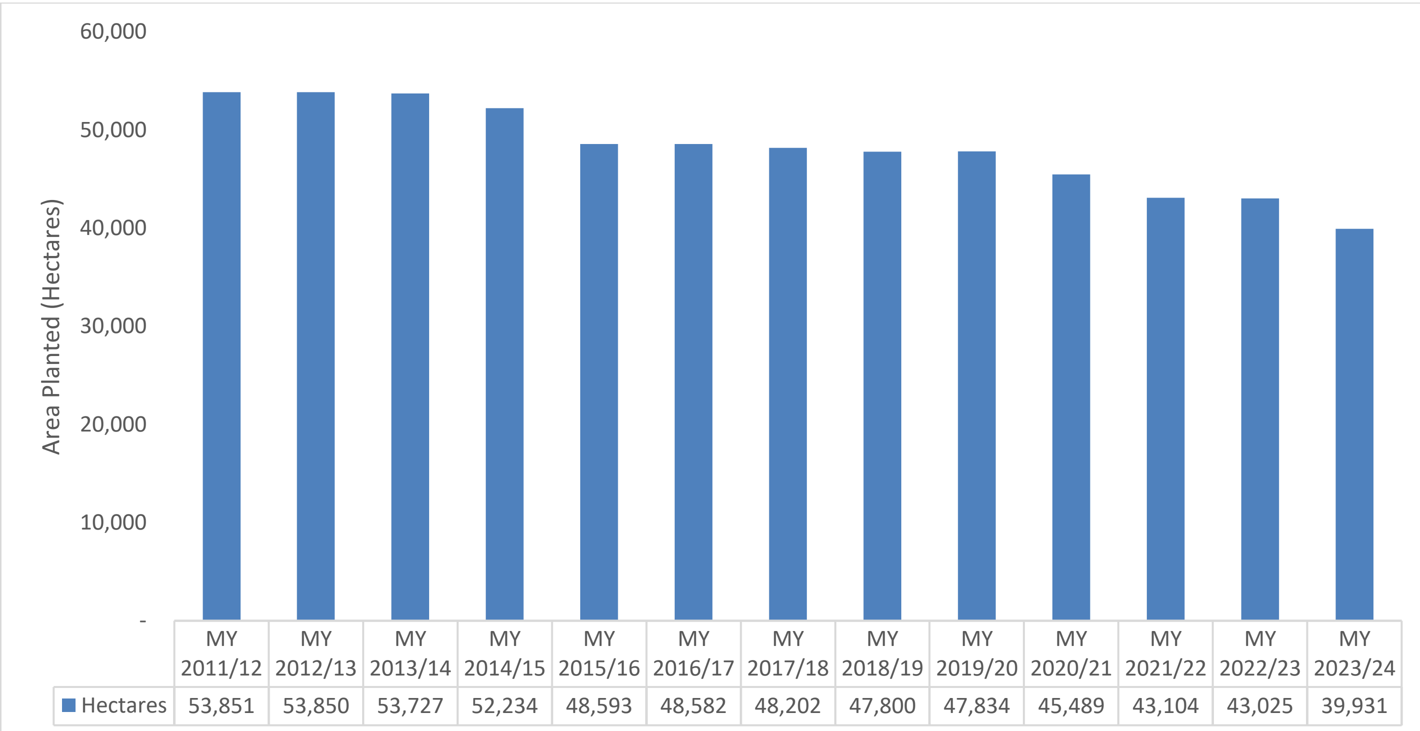
In MY 2024/25, Post estimates table grape production will increase by 6.6 percent, totaling 723,000 MT due to high yields and assuming no unexpected climatic events that could hinder production (Table 1). Table grape yields will increase due to favorable climatic conditions, such as abundant rainfall and a high accumulation of chill hours in the winter.

In MY 2024/25, Post projects a 2.3 percent reduction in the area planted with table grapes, bringing the total to 39,000 hectares. The area dedicated to table grapes has been declining for over a decade due to narrow profit margins (Figure 1). Increased competition from other suppliers and low prices for traditional varieties like crimson, flame, and red globe have forced smaller table grape exporters out of the market.

Data from the Chilean Ministry of Agriculture's Office of Policy and Studies (ODEPA) indicates a decrease in the area planted with table grapes across all production regions in Chile (Table 2). The northern *Atacama* region has seen a particularly sharp decline due to low prices and high production costs, including labor, transport, and chemical products. Grapes from the *Atacama* region face intense competition from Peruvian grapes in the U.S. market, which drives their prices down. Nationwide, the demand for new grape varieties further tightens profit margins, as renewing grape orchards requires a significant investment from producers.

Table grape area planted in the *Metropolitana* region decreased by 22.5 percent in the last three marketing years. Similarly, in the *O'Higgins* region, which is the top producing region in Chile, the area planted decreased by 5.2 percent. In these regions, table grape vineyards were replaced by more profitable crops such as walnuts, cherries, and citrus, or by the expansion of urban areas.

Figure 1: Table Grape Area Planted (Hectares)



Source: ODEPA, 2024

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

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Atacama	5,987	-12.4%	15.0%
Coquimbo	7,321	-10.3%	18.3%
Valparaiso	8,413	-15.6%	21.1%
Metropolitana	5,310	-22.5%	13.3%
O'Higgins	12,736	-5.2%	31.9%
Maule	163	-32.3%	0.4%
Others	1		
Total	**39,931**	**-12.2%**	**100.0%**

Note: Variation of area planted is measured every three years; data provided are the latest available
Source: Based on data from ODEPA, 2024

Policy:

On July 19, 2024, USDA published the final notice to allow table grape exports using the systems approach protocol for three Chilean growing regions: *Atacama*, *Coquimbo*, and *Valparaiso*. These areas have been identified as areas of Chile where European grapevine moth (*Lobesia botrana*) is either absent or at a low prevalence. The new requirements also protect U.S. agriculture from Chilean false red mite (*Brevipalpus chilensis)*.

The systems approach has multiple overlapping requirements that ensure grapes moving into the United States are free of European grapevine moth and Chilean false red mite. The new requirements also allow importers to use irradiation to treat the pest. Importers may continue to use the existing methyl bromide fumigation approach. Whatever approach importers use, these strong requirements help ensure that imported table grapes can be imported safely with little risk of introducing plant pests.

According to Chilean exporters, systems approach will increase competitiveness of Chilean table grapes from the three Chilean regions by avoiding the use of methyl bromide. This change will enhance the quality and condition of table grapes upon arrival in the United States and will also allow for the export of organic table grapes to the U.S. market.

Consumption:

Following the increase in table grape production, Post estimates that fresh domestic consumption of table grapes will rise by 2.1 percent in MY 2024/25, reaching 158,300 metric tons. This consumption level represents 21.9 percent of commercial production and largely consists of table grapes that do not meet export quality standards, such as firmness and size.

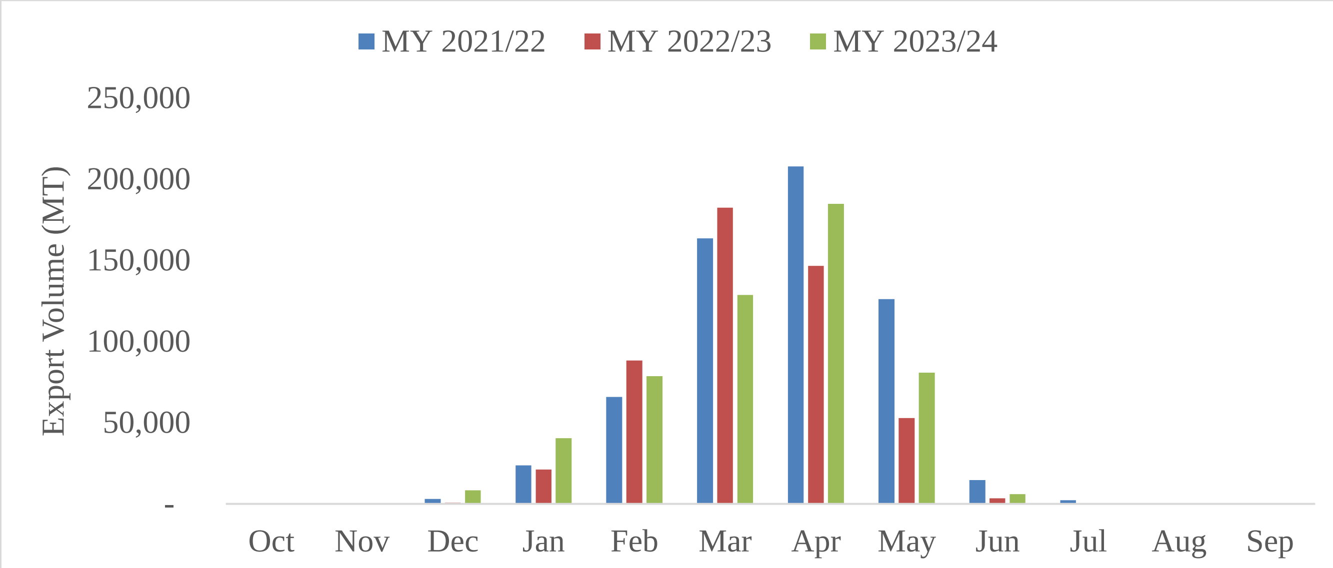
Trade:

In MY 2023/24, due to the increase in table grape production, Post estimates export volume to increase by 7.8 percent, totaling 570,000 metric tons. The top markets for Chilean table grape exports are the United States, China, the Netherlands, and the United Kingdom.

The United States accounted for 249,782 MT of table grape exports in MY 2022/23, which represents 53.2 percent of Chilean table grape exports (Table 3). Chilean table grape exporters are facing challenges in the U.S. market due to the demand for modern table grape varieties and increasing competition with Peruvian table grape exports. Despite these challenges, in MY 2023/24 (data until August) Chilean export of table grapes to the United States increased by 30.3 percent and totaled 325,533 metric tons.

China is the second largest market for Chilean table grapes accounting for 56,928 MT in MY 2022/23, which represented 11.5 percent of total Chilean grape exports. In MY 2023/24 (data until August), Chilean exports to China decreased by 46.7 percent since exporters allocated a larger share of their exports in the U.S. market. Likewise, exports to the Netherlands and the United Kingdom declined by 13.4 percent and 8.9 percent, respectively.

Figure 2: Table Grape Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 3: Table Grape Export Volume to the World (MT)

Commodity: 080610, Grapes, Fresh						
Partner Country	**Marketing Year**			**Year to Date**		
	2021/22 (MT)	**2022/23 (MT)**	**Variation (%)**	**Oct 22-Aug 23 (MT)**	**Oct 23-Aug 24 (MT)**	**Variation (%)**
The World	608,194	496,321	-18.4%	496,321	528,516	6.5%
United States	310,058	249,782	-19.4%	249,782	325,533	30.3%
China	77,627	56,928	-26.7%	56,928	30,347	-46.7%
Netherlands	45,196	31,076	-31.2%	31,076	26,910	-13.4%
United Kingdom	23,789	21,676	-8.9%	21,676	19,745	-8.9%
South Korea	17,952	16,491	-8.1%	16,491	10,780	-34.6%
Japan	14,118	13,457	-4.7%	13,457	12,242	-9.0%
Spain	10,536	12,282	16.6%	12,282	10,000	-18.6%
Mexico	11,239	11,344	0.9%	11,344	13,808	21.7%
Canada	9,600	10,089	5.1%	10,089	16,461	63.2%
Ecuador	9,654	8,537	-11.6%	8,537	9,692	13.5%
Russia	4,274	6,638	55.3%	6,638	3,569	-46.2%
Brazil	6,551	6,031	-7.9%	6,031	6,543	8.5%
Germany	5,641	4,608	-18.3%	4,608	3,128	-32.1%
Portugal	4,694	3,358	-28.5%	3,358	3,248	-3.3%
Colombia	4,426	3,352	-24.3%	3,352	4,762	42.1%
Others	52,839	40,672	-23.0%	40,672	31,748	-21.9%

Source: Trade Data Monitor, LLC

Commodities:

Apples, Fresh

Table 4: Production, Supply and Distribution

Apples, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jan 2023		Jan 2024		Jan 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	29035	29035	29006	29006	0	28000
Area Harvested (HA)	28500	28500	28500	28500	0	27000
Bearing Trees (1000 TREES)	32500	32500	32500	32500	0	31500
Non-Bearing Trees (1000 TREES)	2250	2250	2000	2000	0	1800
Total Trees (1000 TREES)	34750	34750	34500	34500	0	33300
Commercial Production (MT)	870000	870000	860000	904000	0	910000
Non-Comm. Production (MT)	10000	10000	10000	10000	0	10000
Production (MT)	880000	880000	870000	914000	0	920000
Imports (MT)	3000	3000	3000	3000	0	3000
Total Supply (MT)	883000	883000	873000	917000	0	923000
Domestic Consumption (MT)	413700	413696	410000	415000	0	416000
Exports (MT)	469300	469304	463000	502000	0	507000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	883000	883000	873000	917000	0	923000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

Production:

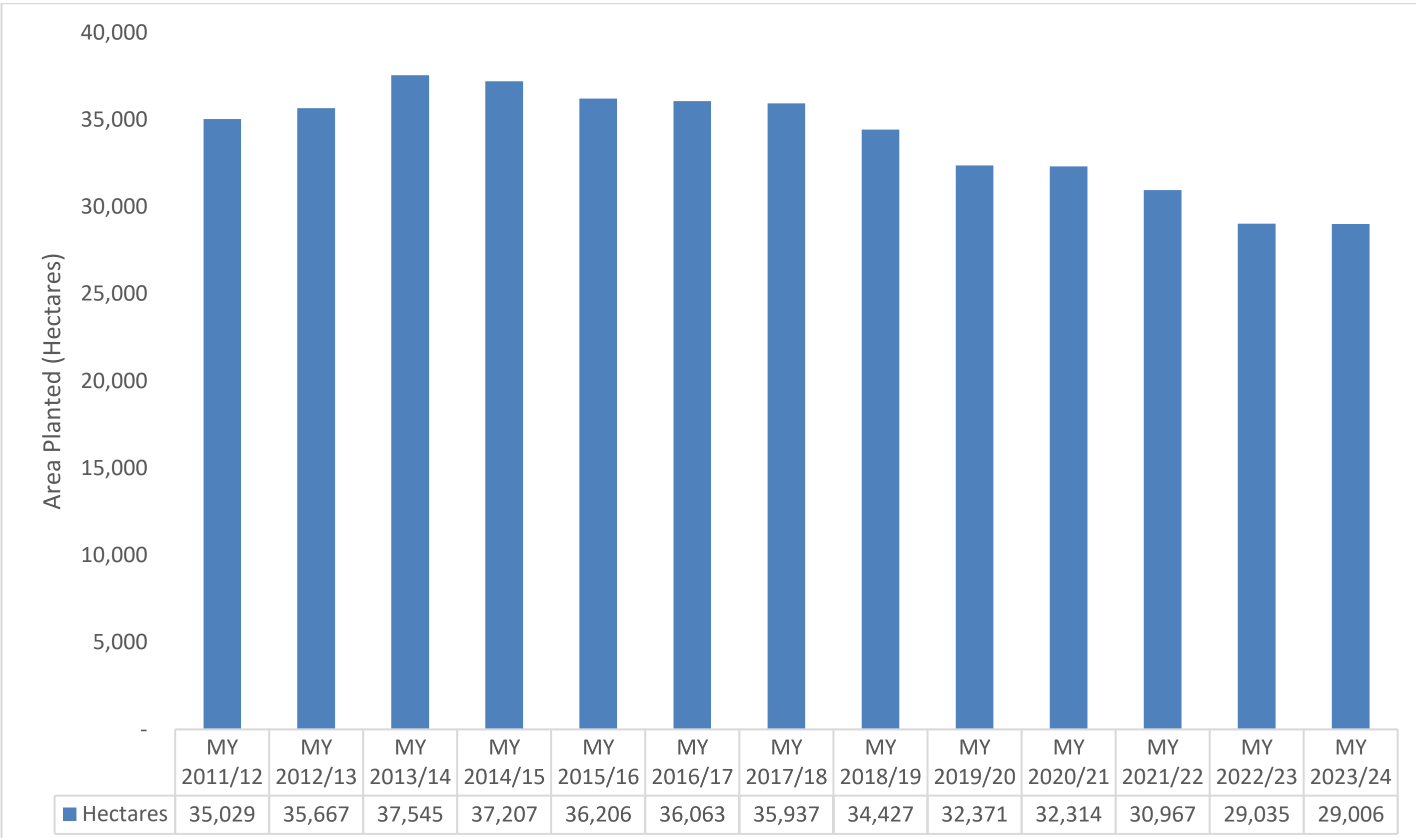
In MY 2024/25, the area planted with apples is expected to decrease to 28,000 hectares, continuing the declining trend observed over the past ten marketing years (Figure 3). Post estimates MY 2024/25 apple production at 920,000 metric tons (MT), a 0.7 percent increase from MY 2023/24 (Table 4). This slight increase in production is attributed to high yields, which are expected to offset the decline in the area planted. Apple production has benefited from abundant rainfall during the winter and sufficient accumulation of chill hours.

The apple export business is very competitive, and Chilean exporters need to stay up to date in preferred varieties, that give high productivity and quality in terms of color, taste and condition. Chile grows mainly the following apple varieties: Royal Gala, Pink Lady, Fuji, and Granny Smith. The most competitive producers are renewing their orchards with new apple varieties such as Brookfield Gala, Pink Lady, Rosy Glow, Ambrosia, Envy, Modi, and Buckeye.

The Maule and O'Higgins regions in the central-south part of Chile account for 62.4 percent and 22.0 percent of the area planted with apples, respectively, making up 84.4 percent of the total area planted. However, the area planted has decreased in both regions as many producers have orchards with older, less profitable varieties compared to modern varieties and other crops such as cherries and walnuts.

Additionally, the area planted has decreased across all Chilean apple-producing regions due to low profits (see Table 5).

Figure 3: Apple Area Planted (Hectares)



Source: ODEPA, 2024

Table 5: Apple Area Planted by Region MY 2023/24 (Hectares)

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Valparaiso	140	-2.7%	0.5%
Metropolitana	58	-30.1%	0.3%
O'Higgins	6,388	-17.4%	22.0%
Maule	18,110	-4.2%	62.4%
Ñuble	860	-14.3%	3.0%
Biobio	584	-6.3%	2.0%
La Araucania	2,834	-7.4%	9.8%
Others	32		0.1%
Total	**29,006**	**10.2%**	**100.0%**

Note: Variation of planted area is measured every three years; data provided are last available

Source: ODEPA, 2024

Policy:

No new policy developments to report.

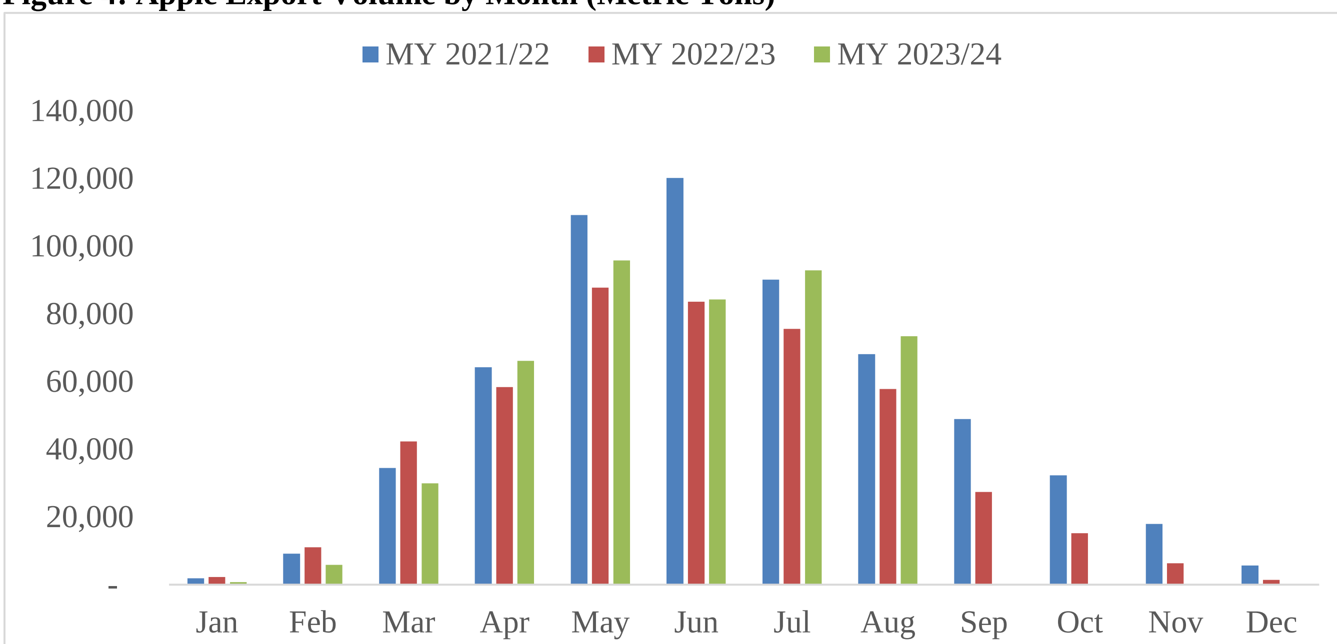
Consumption:

For MY 2024/25, Post estimates that due to higher production, domestic consumption of apples (including both fresh and processed) will increase by 0.2 percent, totaling 416,000 metric tons. This level of consumption represents 45.7 percent of commercial apple production. The 45.7 percent figure highlights the importance of the local market in sustaining the apple production industry.

Trade:

For MY 2024/25, Post estimates Chilean apple exports will total 507,000 MT, a 1.0 percent increase from MY 2023/24, in line with the lower production. In MY 2023/24 (data until August), Chilean apple exports increased by 7.2 percent from MY 2022/23 and totaled 449,093 metric tons. The export season was delayed, reducing the monthly export volume year-over-year. However, higher export levels later in the season rounded out the total export number (see Figure 4).

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



Source: Trade Data Monitor, LLC

Colombia is the top market for Chilean apples. In MY 2022/23 Chile exported 64,847 MT of apples to Colombia, which represented 13.8 percent of Chilean apple exports (Table 6). In MY 2023/24 (data until August), exports to this market increased by 4.5 percent in volume.

Brazil was the second largest market destination with 11.2 of Chilean apple exports going to that country in MY 2022/23. In MY 2023/24 (data until August), exports increased by 91.4 percent, and Brazil overtook Colombia as the top destination. Chilean exporters have sought to increase exports to Brazil due to facilitated regulatory access and a rising demand for Chilean fruit.

The United States is the third largest market for Chilean apples, accounting for 9.9 percent of Chilean apple exports. However, exports to the United States decreased by 46.9 percent in MY 2023/24 as apple exporters allocated more of their products to Brazil.

Table 6: Apple Export Volume to the World (MT)

Commodity: 080810, Apples, Fresh						
Partner Country	Marketing Year			January-August		
	2021/22	2022/23	Variation (%)	2023	2024	Variation (%)
The World	602,581	469,304	-22.1%	418,901	449,093	7.2%
Colombia	85,899	64,847	-24.5%	53,885	56,296	4.5%
Brazil	65,193	52,724	-19.1%	41,941	80,288	91.4%
United States	52,669	46,360	-12.0%	46,221	24,527	-46.9%
Ecuador	47,169	38,357	-18.7%	32,775	32,071	-2.1%
Peru	39,013	37,207	-4.6%	27,046	15,208	-43.8%
Taiwan	29,432	23,567	-19.9%	23,347	28,149	20.6%
Saudi Arabia	23,848	21,256	-10.9%	21,256	27,890	31.2%
Netherlands	33,819	19,171	-43.3%	18,507	20,764	12.2%
India	35,003	16,483	-52.9%	16,483	26,976	63.7%
Germany	19,903	14,197	-28.7%	13,684	18,682	36.5%
Bolivia	15,992	12,366	-22.7%	9,704	9,531	-1.8%
France	12,693	11,970	-5.7%	11,217	9,845	-12.2%
Canada	10,015	10,906	8.9%	10,873	5,148	-52.7%
Guatemala	16,427	10,727	-34.7%	10,086	11,338	12.4%
United Kingdom	18,770	9,580	-49.0%	9,319	16,933	81.7%
Others	96,736	79,586	-17.7%	72,557	65,447	-9.8%

Source: Trade Data Monitor, LLC

Commodities:
Pears, Fresh

Table 7: Production, Supply and Distribution

Pears, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jan 2023		Jan 2024		Jan 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	5878	5878	5791	5791	0	5700
Area Harvested (HA)	5800	5800	5700	5700	0	5600
Bearing Trees (1000 TREES)	5950	5950	5800	5800	0	5500
Non-Bearing Trees (1000 TREES)	1000	1000	1000	1000	0	1000
Total Trees (1000 TREES)	6950	6950	6800	6800	0	6500
Commercial Production (MT)	210000	210000	200000	200000	0	205000
Non-Comm. Production (MT)	2000	2000	2000	2000	0	2000
Production (MT)	212000	212000	202000	202000	0	207000
Imports (MT)	900	700	700	700	0	700
Total Supply (MT)	212900	212700	202700	202700	0	207700
Domestic Consumption (MT)	107900	107787	102700	102700	0	103000
Exports (MT)	105000	104913	100000	100000	0	104700
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	212900	212700	202700	202700	0	207700
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

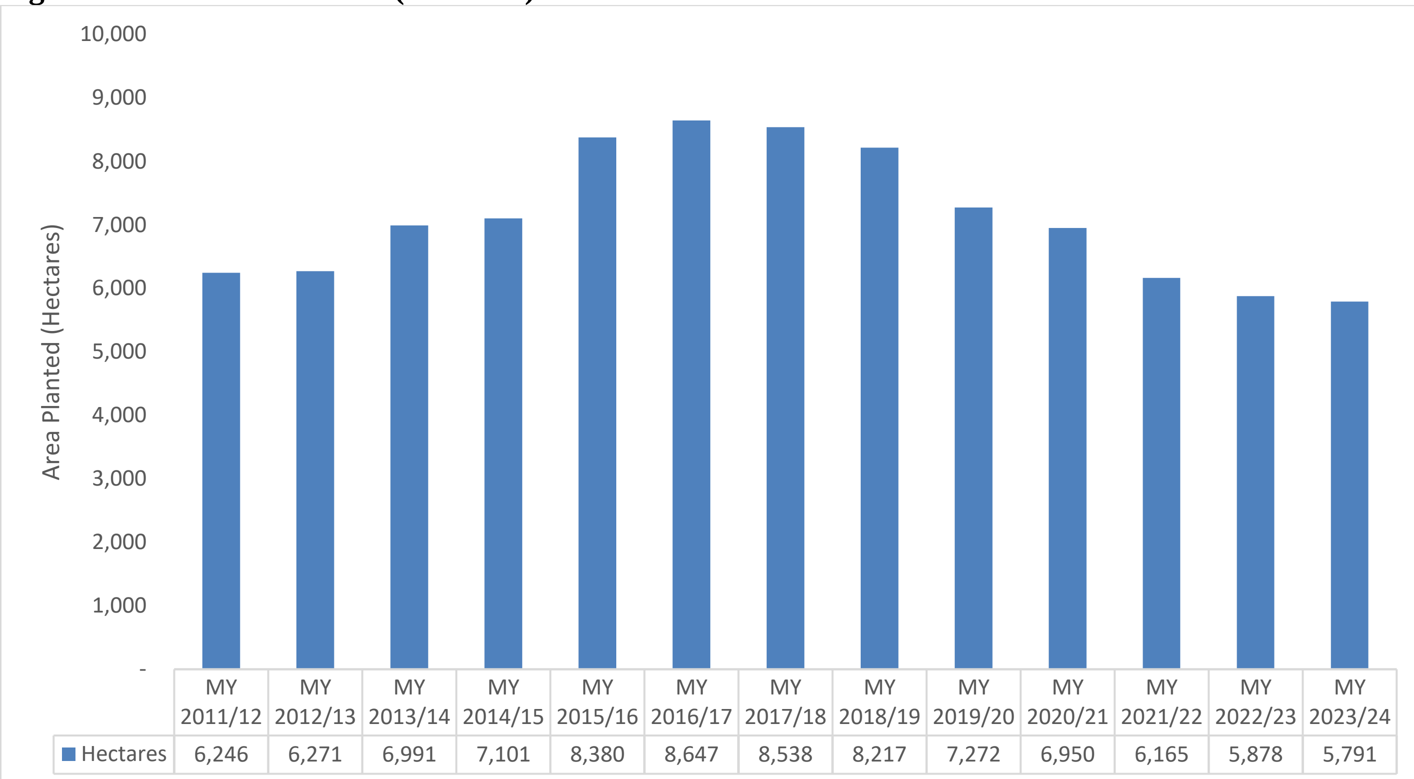
Production:

Post estimates Chile's MY 2024/25 fresh pear production will increase by 2.5 percent to a total of 205,000 MT due to high yields (Table 7). Yields will increase due to favorable climatic conditions in the winter and spring and will offset the projected 1.6 decrease in area planted.

Pear area planted has been decreasing annually since MY 2016/17, due to low margins (Figure 5). Pear production and export has faced difficulties due to a series of factors. Some of these factors are the difficulties of finding alternative markets for varieties such as Abate Fetel or Coscia; which have demand mostly from Italy. Other factors are problems in post-harvest, such as limited shelf life or the high susceptibility to physical damage during transportation. Finally, the overall low margins for pear producers have limited the growth in area planted.

The top pear-producing regions are *O'Higgins*, which holds 63.2 percent of the area planted, and *Maule*, which holds 26.6 percent. According to the latest data from ODEPA, the area planted with pears in all producing regions has decreased over the past three marketing years (see Table 8). The top varieties grown in Chile are Packham's Triumph, Forelle, Coscia, Winter Nelis, and Abate Fetel.

Figure 5: Pear Area Planted (Hectares)



Source: ODEPA, 2024

Table 8: Pear Area Planted by Region MY 2023/24 (hectares)

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Metropolitana	393.23	-18.03%	8.20%
O'Higgins	3,715	-17.50%	63.20%
Maule	1,564	-15.90%	26.60%
Others	119		2.00%
Total	**5,791**	**16.70%**	**100.00%**

Note: Variation of planted area is measured every three years; data provided are last available
Source: ODEPA, 2024

Policy:

No new policy developments to report.

Consumption:

In MY 2024/25, due to the decrease in production, Post estimates that domestic consumption of pears will increase by 0.3 percent, totaling 103,000 metric tons. This consumption represents 50.2 percent of total pear production. Pears are used for fresh consumption and further processing, with the processing industry producing juice, mashed pears for infants, and desserts.

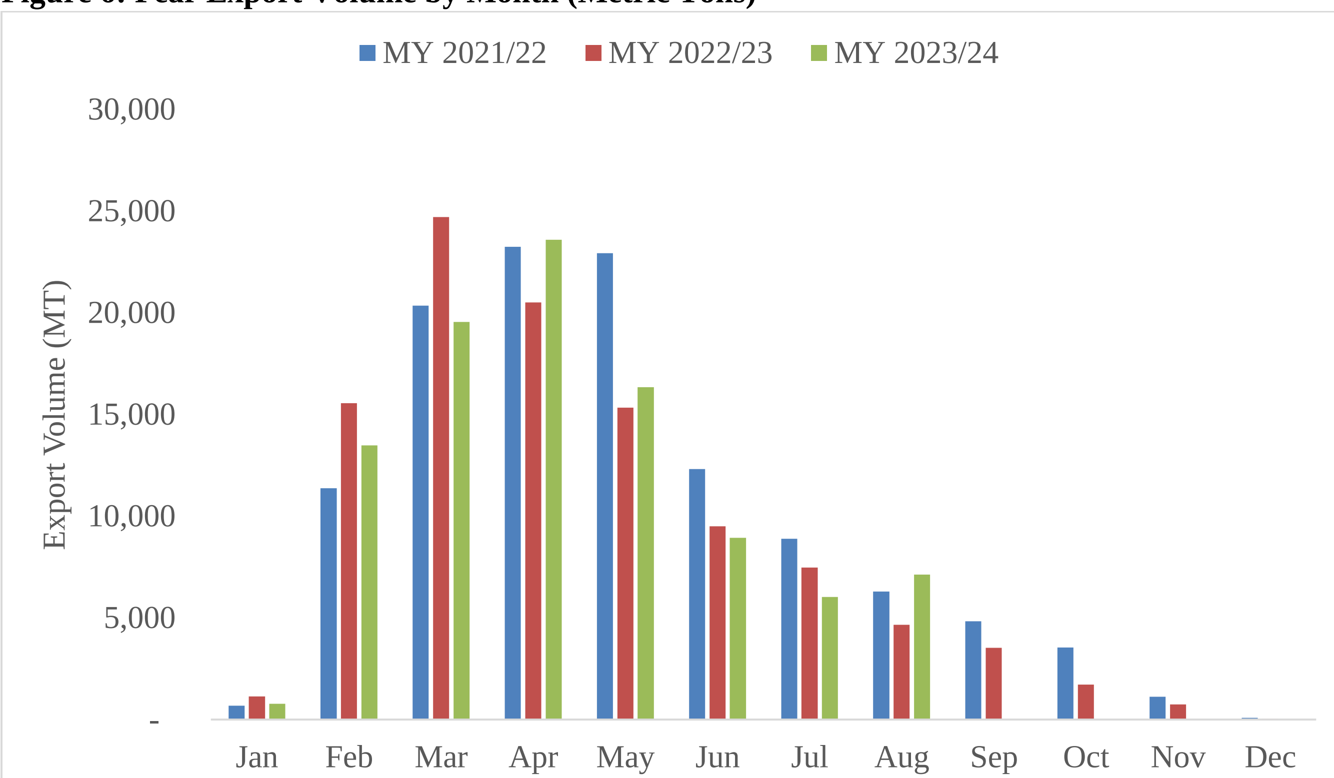
Trade:

In MY 2024/25, due to a higher production volume, Post estimates pear exports will increase by 4.7 percent and total 104,700 metric tons. Pears are challenging to produce and to export, since they are delicate and need special handling and packaging to avoid damage. This challenge has limited the expansion of export volumes to both new and current markets.

Chile's top markets for fresh pear exports are Colombia. Italy, and Ecuador. In MY 2023/24 (data until August) exports to Colombia and Ecuador decreased. Meanwhile, exports to Italy and the Netherlands increased because exporters are seeking the high prices found in European markets (Table 9).

In MY 2023/24 (data until August), pear exports decreased by 3.1 percent, totaling 95,822 metric tons (Table 9). Monthly export volumes were delayed in the beginning of the export season but later recovered as the season evolved (Figure 6).

Figure 6: Pear Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

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

Commodity: 080830, Pears, Fresh						
Partner Country	**Marketing Year**			**January-August**		
	2021/22 (MT)	**2022/23 (MT)**	**Variation (%)**	**2023 (MT)**	**2024 (MT)**	**Variation (%)**
The World	115,659	104,913	-9.3%	98,880	95,822	-3.1%
Colombia	18,964	15,865	-16.3%	12,827	12,270	-4.3%
Italy	12,924	14,184	9.7%	14,184	17,458	23.1%
Ecuador	11,348	9,404	-17.1%	8,537	8,317	-2.6%
Netherlands	15,102	7,419	-50.9%	7,419	7,863	6.0%
Spain	4,540	6,913	52.3%	6,885	5,976	-13.2%
Russia	8,659	6,490	-25.0%	6,490	7,154	10.2%
United States	7,356	6,265	-14.8%	6,265	5,582	-10.9%
China	3,765	5,329	41.5%	5,329	1,655	-68.9%
Peru	7,348	4,702	-36.0%	4,202	3,029	-27.9%
Germany	4,182	3,892	-6.9%	3,892	3,684	-5.3%
Brazil	2,913	3,601	23.6%	3,323	4,083	22.9%
Taiwan	1,624	2,060	26.8%	2,017	1,801	-10.7%
Guatemala	1,491	1,878	26.0%	1,737	1,449	-16.6%
Panama	2,024	1,545	-23.7%	1,355	992	-26.8%
France	1,103	1,523	38.1%	1,523	1,269	-16.7%
Others	12,316	13,843	12.4%	12,895	13,240	2.7%

Source: Trade Data Monitor, LLC

Attachments:

No Attachments