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Chile

Fresh Deciduous Fruit Semi-annual

Fresh Apples, Table Grapes and Pear Semi Annual Report

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Report Highlights:
Frost conditions in CY 2014 and temperature variations impact Chile's apple production in its principle production regions. As a result, production is expected to fall by 9.9 percent in MY 2014/2015. In contrast, production and exports of table grapes and pears are expected to expand in MY2014/2015 when compared to the previous marketing year.

Executive Summary:

Our estimates show that production and exports of apples will fall in MY2014/2015, as weather has not been favorable for production in volume and quality. For table grapes and pears output and exports are expected to increase when compared to the previous year.

Commodities:

Apples, Fresh

Production: Adverse climatic conditions, mainly frost last spring (during CY2014) in Chile's primary fresh fruit production regions of the O'Higgins Region (Rancagua) and Maule Region (San Fernando, Curico) will affect total apple output for MY2014/2015. Output is expected to be close to 9.9 percent less than the MY2013/2014 production season. Additionally, the apple production quality was also affected because of higher than normal temperatures and a lack of a needed temperature differences between day and night which prevented apples to get enough color (in red varieties particularly), which is in high demand by all export markets.

Consumption: There are no official statistics on domestic fresh apple consumption. The figures shown in our PS&D table are estimated as a residual of production, minus apples destined for processing and known exports.

Trade:

As a result of the decline in production, total apple exports for MY2014/2015 are expected to decline comparatively. Thus, Chilean exports of apples this year is estimated at less than 750,000 metric tons (MT) or nearly 9.8 percent less than the previous marketing year (MY).

Production, Supply and Demand Data Statistics:

Apples, Fresh	2012/2013		2013/2014		2014/2015	
Market Begin Year	Jan 2013		Jan 2014		Jan 2015	
Chile	USDA Official	New post	USDA Official	New post	USDA Official	New post
Area Planted	37,300	37,300	37,700	37,700	37,200	37,207
Area Harvested	33,150	33,150	33,500	33,500	33,500	33,500
Bearing Trees	14,912	14,912	15,100	15,070	15,100	15,070
Non-Bearing Trees	1,899	1,899	1,920	1,920	1,700	1,698
Total Trees	16,811	16,811	17,020	16,990	16,800	16,768
Commercial Production	1,410,000	1,410,000	1,300,000	1,300,000	1,400,000	1,170,000
Non-Comm. Production	10,000	10,000	10,000	10,000	10,000	10,000
Production	1,420,000	1,420,000	1,310,000	1,310,000	1,410,000	1,180,000
Imports	1,100	1,050	600	1,326	600	1,000
Total Supply	1,421,100	1,421,050	1,310,600	1,311,326	1,410,600	1,181,000
Fresh Dom. Consumption	196,000	196,000	196,000	196,000	197,000	190,000
Exports	833,100	833,100	820,000	819,951	834,000	740,000
For Processing	392,000	391,950	294,600	295,375	379,600	251,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	1,421,100	1,421,050	1,310,600	1,311,326	1,410,600	1,181,000
HA, 1000 TREES, MT						

Commodities:

Grapes, Table, Fresh

Production:

Chile produces over 36 varieties of table grapes for export. Thompson Seedless, Crimson Seedless, Red globe, Flame Seedless Superior Seedless, Sugraone and Autumn Royal account for over 90 percent of production. Table Grapes are planted from the Atacama Region (Copiapo) to the Maule Region (Curico-Talca) -- third and fourth regions of Chile.

Despite the drought affecting the production in the third and fourth regions for the last few years, output for the MY2014/2015 is expected to increase close to 15 percent when compared to the previous season (MY2013/2014).

Consumption:

As with other Chilean fresh fruits, domestically consumed table grapes are mainly export rejects. There are no official statistics on domestic consumption. Domestic fresh consumption is derived from the only known figure -- exports and estimated production data. Domestic consumption and processing, generally accounts for nearly 30 percent of total output.

Trade:

Higher volumes of table grape exports are mainly due to a larger output. However, industry sources indicate that as a result of higher than normal temperatures during the summer months and rain during the month of March 2015 affected the quality of the production. Thus, total exports in MY2104/2015 are only expected to increase by 13.4 percent when compared to the MY. The United Sates is still the main destination for Chilean table grapes, a little over 46 percent of total exports go to that market. China is Chile's second largest market with only 10 percent of total table grape exports.

Production, Supply and Demand Data Statistics:

Grapes, Fresh	2012/2013		2013/2014		2014/2015	
Market Begin Year	Jan 2013		Jan 2014		Jan 2015	
Chile	USDA Official	New post	USDA Official	New post	USDA Official	New post
Area Planted	62,500	62,470	62,600	62,570	52,200	52,234
Area Harvested	53,100	53,125	53,300	53,250	49,600	49,622
Commercial Production	1,190,000	1,190,000	1,050,000	1,050,000	1,200,000	1,200,000
Non-Comm. Production	5,000	5,000	5,000	5,000	5,000	5,000
Production	1,195,000	1,195,000	1,055,000	1,055,000	1,205,000	1,205,000
Imports	200	215	200	205	200	200
Total Supply	1,195,200	1,195,215	1,055,200	1,055,205	1,205,200	1,205,200
Fresh Dom. Consumption	339,200	339,215	325,200	323,205	380,200	375,200
Exports	856,000	856,000	730,000	732,000	825,000	830,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	1,195,200	1,195,215	1,055,200	1,055,205	1,205,200	1,205,200
HA, MT						

Commodities:

Pears, Fresh

Production: As a result of enough cold weather hours for good budding and frost in some areas during last winter, pear production is expected to recuperate to normal levels of production in MY2014/2015. As a result total output is expected to increase by 8.6 % in MY2014/2015 when compared to the previous MY.

Consumption:

Most pears are consumed fresh because only a few existing varieties in Chile can be processed for canned pears or juice concentrates. Like most fruit destined for export, most domestically consumed pears are mainly export rejects.

Trade:

A larger total production of pears and export volume is expected in MY2014/2015, as a good quality of the production is expected and the export demand is strong, according to industry contacts.

Production, Supply and Demand Data Statistics:

Pears, Fresh	2012/2013		2013/2014		2014/2015	
Market Begin Year	Jan 2013		Jan 2014		Jan 2015	
Chile	USDA Official	New post	USDA Official	New post	USDA Official	New post
Area Planted	6,600	6,590	6,600	6,590	6,600	6,590
Area Harvested	6,000	6,000	6,000	6,000	6,000	6,000
Bearing Trees	3,000	2,981	3,000	2,981	3,000	2,981
Non-Bearing Trees	300	285	300	285	300	285
Total Trees	3,300	3,266	3,300	3,266	3,300	3,266
Commercial Production	287,000	287,000	265,000	265,000	288,000	288,000
Non-Comm. Production	2,000	2,000	2,000	2,000	2,000	2,000
Production	289,000	289,000	267,000	267,000	290,000	290,000
Imports	200	165	200	284	200	200
Total Supply	289,200	289,165	267,200	267,284	290,200	290,200
Fresh Dom. Consumption	81,400	84,000	84,000	86,000	86,200	86,000
Exports	145,600	143,000	125,000	116,752	135,000	129,000
For Processing	62,200	62,165	58,200	64,532	69,000	75,200
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	289,200	289,165	267,200	267,284	290,200	290,200
HA, 1000 TREES, MT						