

**Required Report:** Required - Public Distribution

**Date:** July 24, 2023

**Report Number:** CI2023-0016

## **Report Name:** Raisin Annual

**Country:** Chile

**Post:** Santiago

**Report Category:** Raisins

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### **Report Highlights:**

Raisin production in Chile relies almost exclusively on table grape production that does meet quality levels for fresh exports. It also became a profitable alternative for orchards with traditional table grape varieties that are facing low prices in international markets. In marketing year (MY) 2023/24, table grape area planted will continue its downward trend to 42,500 hectares (ha), a 1.2 percent decrease from MY 2022/23. For MY 2023/24, Post projects 67,500 metric tons (MT) of raisin production, a 3.3 percent decrease from MY 2022/23. Chilean raisin exports will total 64,300 MT, a 3.5 percent decrease from MY 2022/23.

**Table 1. Production, Supply, and Distribution**

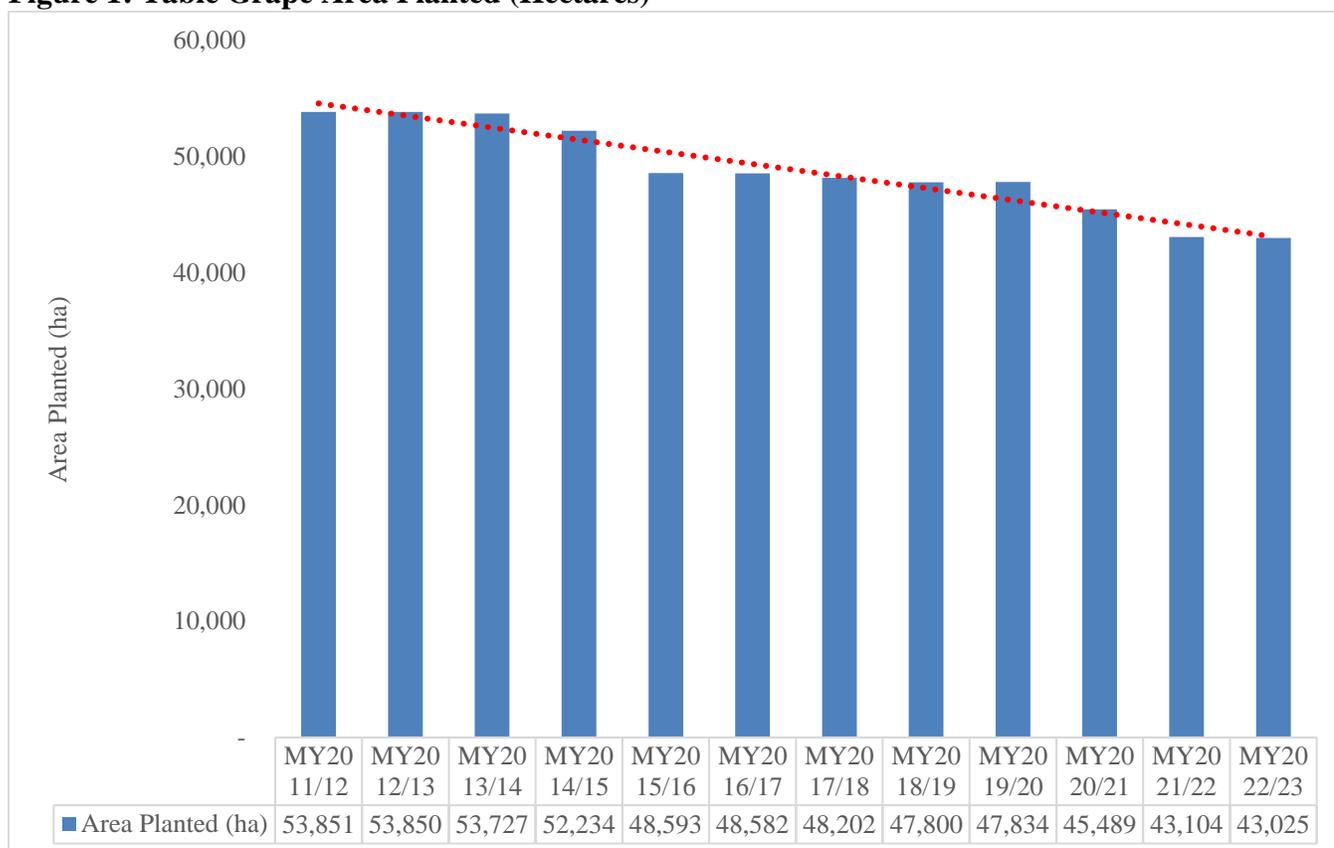
<b>Raisins</b>	<b>2021/2022</b>		<b>2022/2023</b>		<b>2023/2024</b>	
<b>Market Year Begins</b>	<b>Jan 2022</b>		<b>Jan 2023</b>		<b>Jan 2024</b>	
<b>Chile</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HA)</b>	0	43,104	0	43,025	0	42,500
<b>Area Harvested (HA)</b>	0	43,000	0	42,000	0	41,500
<b>Beginning Stocks (MT)</b>	0	493	0	400	0	400
<b>Production (MT)</b>	0	67,000	0	69,800	0	67,500
<b>Imports (MT)</b>	0	373	0	400	0	400
<b>Total Supply (MT)</b>	0	67,373	0	70,600	0	65,800
<b>Exports (MT)</b>	0	63,966	0	66,650	0	64,300
<b>Domestic Consumption (MT)</b>	0	3,500	0	3,550	0	3,600
<b>Ending Stocks (MT)</b>	0	400	0	400	0	400
<b>Total Distribution (MT)</b>	0	67,866	0	70,600	0	65,800
(HA), (MT)						

Source: Post estimates

#### **Area Planted:**

For MY 2023/24, Post estimates that table grape area planted will continue its downward trend to 42,500 hectares (ha), a 1.2 percent decrease from MY 2022/23 (See Table 1). Table grape area planted is on a decreasing trend due to low profits and drought in table grape production areas, such as the *Coquimbo* region. Area planted decreased from 53,851 hectares in MY 2011/12 to 43,025 hectares in MY 2022/23 (see Figure 1). Data from the Chilean Office of Agricultural Policy and Studies (ODEPA) shows a decrease in area planted from all table grape production regions. Area planted decrease is especially significant in the *Atacama* region, in the northern part of the country, due to low profits and increasing competition in foreign markets from Peru.

**Figure 1: Table Grape Area Planted (Hectares)**



Source: ODEPA, 2023

**Production:**

In MY 2023/24 raisin production is projected to reach 67,500 MT, a 3.3 percent decrease from MY 2022/23 (Table 1). The reduction in raisin production is in line with the decreasing trend in table grape area planted and assumes normal yields (Figure 1).

Raisin production in Chile comes from fresh table grape production, normally destined for export. Profits from raisins are lower than profits from fresh table grape exports. Producers use raisins as an alternative for those grapes that cannot be exported because of their quality, maturity, or size. Moreover, raisin production became a profitable alternative for orchards that have traditional varieties, such as Crimson seedless or Thompson seedless. These traditional varieties have been facing low profits in the fresh table grape export business in the past years, due to consumer preferences for new varieties.

In MY 2022/23, Post estimates raisin production increased by 4.2 percent to 69,800 MT (see Table 2). MY 2022/23 was a low yield year for fresh table grapes and a lower share of the table grape production was of high enough quality to export fresh. With lower exports of fresh grapes, the production share for raisins increased from 22.4 percent in MY 2021/22 to 23.7 percent in MY 2022/23.

**Table 2: Chilean Table Grape Production**

<b>Production sector</b>	<b>MY2021/22 (MT)</b>	<b>Share (%)</b>	<b>MY2022/23 (MT)</b>	<b>Share (%)</b>	<b>MY2023/24 (MT)</b>	<b>Share (%)</b>
Fresh Table Grapes	788,110	60.0%	720,000	58.2%	710,000	58.4%
Raisin production (fresh basis)	294,800	22.4%	293,160	23.7%	283,500	23.3%
<i>Raisins (dried basis)</i>	<i>67,000</i>		<i>69,800</i>		<i>67,500</i>	
Juice production	165,000	12.6%	161,967	13.1%	161,000	13.2%
Wine production	65,263	5.0%	62,295	5.0%	62,000	5.1%
<b>Total Production</b>	<b>1,313,173</b>	<b>100.0%</b>	<b>1,237,422</b>	<b>100.0%</b>	<b>1,216,500</b>	<b>100.0%</b>

Source: Post estimates

### **Consumption:**

In MY2023/24, raisin consumption is estimated to increase by 1.4 percent to 3,600 MT following population growth. Domestic consumption of raisins consists of raisins for snacks and for confectionary. The Chilean food industry uses raisins in ice-cream, bakery, cookies, and chocolate.

### **Stocks:**

Stocks are projected to remain flat at 400 MT in MY 2023/24. Stocks are raisins that were not sold between marketing years. Chilean companies do not store raisins for large periods of time, since trade flow is constant throughout the year.

### **Trade:**

Post estimates that in MY 2023/24 Chilean raisin exports will decrease to 64,300 MT, a 3.5 percent decrease from MY 2022/23 following the decrease in table grape production to 710,000 metric tons. From January to May 2023, Chilean raisin exports to the world increased by 13.3 percent in volume from the same period in 2022 reaching 20,099 MT (Table 3) or \$40.0 million (Table 4).

Chilean raisin exports are available throughout the year, and export volume peaks between September and November before the table grape harvest starts. In MY 2022/23, monthly exports of raisins showed an increase over MY 2021/22, except in January. The delays in transport and high shipments cost experienced by exporters in the past two marketing years between January and May did not take place in MY 2022/23, favoring more steady exports.

Generally, the top markets for Chilean raisin exports are the United States, Colombia, Peru, and China. These markets have historically been of importance for Chilean raisins and differences year-to-year are attributed to specific market conditions and price variations. In MY 2022/23, the Netherlands, Brazil, and the United Kingdom increased their importance as export markets, displacing Peru and China as top export destinations (data until May).

**Policy:**

No updates to report.

**Table 3: Chilean Export Statistics, Volume (MT)**

<b>Commodity: 080620, Grapes, Dried (Including Raisins)</b>						
<b>Partner Country</b>	<b>Marketing Year</b>			<b>January-May</b>		
	<b>MY 2020/21 (MT)</b>	<b>MY 2021/22 (MT)</b>	<b>Variation (%)</b>	<b>2022 (MT)</b>	<b>2023 (MT)</b>	<b>Variation (%)</b>
The World	63,400	63,966	0.9%	17,736	20,099	13.3%
United States	6,506	7,131	9.6%	2,157	1,836	-14.9%
Colombia	2,550	5,687	123.0%	1,489	1,831	23.0%
Peru	4,202	4,455	6.0%	419	661	57.8%
China	4,279	4,231	-1.1%	1,493	892	-40.3%
Mexico	5,411	3,632	-32.9%	1,252	1,036	-17.3%
Brazil	226	3,590	1488.5%	405	1,028	153.8%
Netherlands	4,927	3,093	-37.2%	1,098	1,623	47.8%
United Kingdom	3,943	2,715	-31.1%	1,080	1,041	-3.6%
Venezuela	1,176	2,411	105.0%	139	96	-30.9%
Spain	2,073	1,938	-6.5%	716	480	-33.0%
Ecuador	2,530	1,893	-25.2%	588	489	-16.8%
Turkey	1,325	1,736	31.0%	541	611	12.9%
Taiwan	1,502	1,613	7.4%	506	525	3.8%
Denmark	1,817	1,440	-20.7%	604	428	-29.1%
Algeria	276	1,413	412.0%	231	550	138.1%
Others	20,657	16,988	-17.8%	5,018	6,972	38.9%

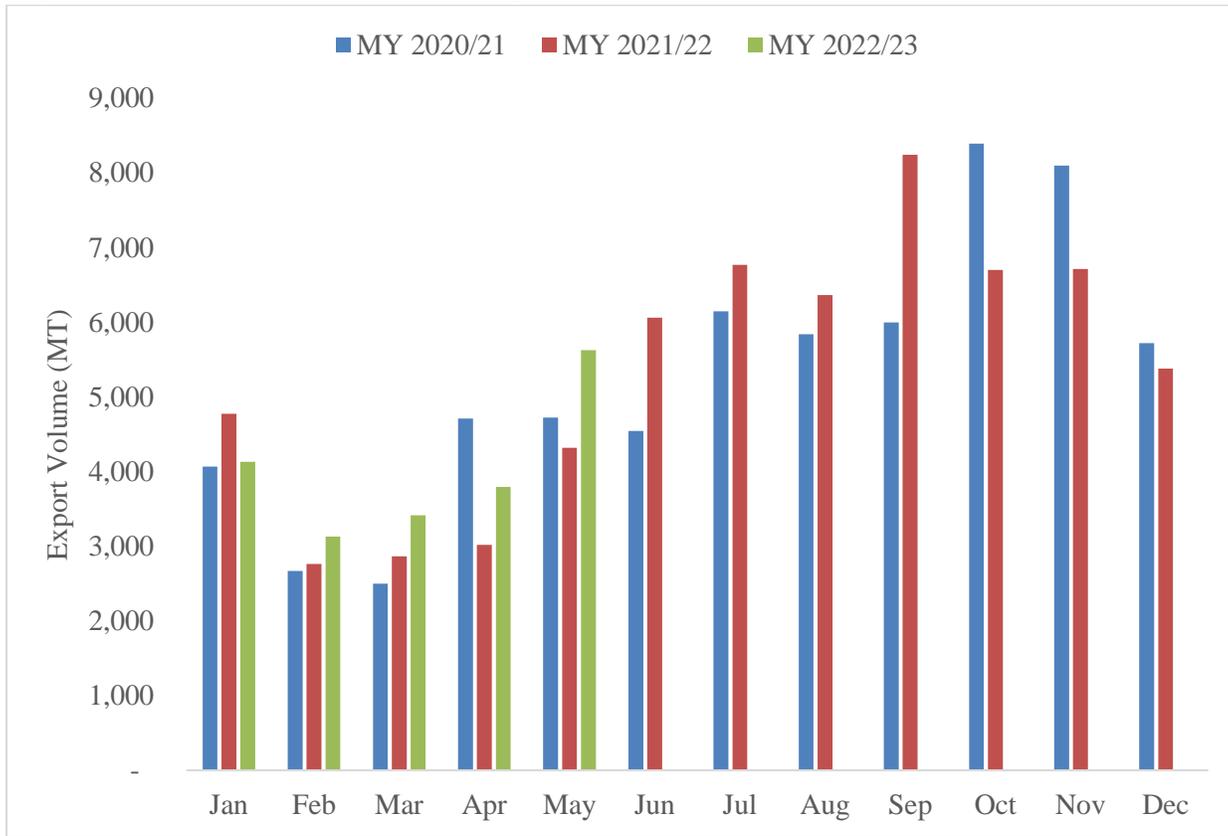
*Source of Data: Trade Data Monitor, LLC*

**Table 4: Chilean Export Statistics, Value (USD)**

<b>Commodity: 080620, Grapes, Dried (Including Raisins)</b>						
<b>Partner Country</b>	<b>Marketing Year</b>			<b>January-May</b>		
	<b>MY 2020/21 (USD)</b>	<b>MY 2021/22 (USD)</b>	<b>Variation (%)</b>	<b>2022 (USD)</b>	<b>2023 (USD)</b>	<b>Variation (%)</b>
The World	127,347,085	129,046,435	1.3%	34,675,379	40,039,104	15.5%
United States	11,819,943	13,860,575	17.3%	4,056,476	3,431,037	-15.4%
Peru	8,995,086	9,297,954	3.4%	847,622	1,233,109	45.5%
China	8,718,452	9,066,232	4.0%	3,182,994	1,824,888	-42.7%
Colombia	3,846,283	9,027,656	134.7%	2,223,862	2,860,702	28.6%
Netherlands	11,333,202	6,594,614	-41.8%	2,247,874	3,470,743	54.4%
Mexico	8,435,303	6,008,844	-28.8%	1,964,383	1,576,878	-19.7%
Brazil	462,003	5,575,046	1106.7%	555,362	1,523,224	174.3%
United Kingdom	7,783,638	5,264,899	-32.4%	1,961,865	2,023,108	3.1%
Spain	4,467,160	4,461,476	-0.1%	1,628,231	1,012,383	-37.8%
Algeria	538,761	3,918,576	627.3%	389,804	1,259,755	223.2%
Venezuela	1,750,767	3,751,116	114.3%	224,931	153,137	-31.9%
Taiwan	3,355,663	3,732,698	11.2%	1,050,008	1,162,093	10.7%
Turkey	2,800,423	3,689,541	31.7%	1,114,581	1,252,245	12.4%
France	2,631,894	3,201,612	21.6%	844,548	532,468	-37.0%
Russia	7,592,318	2,765,323	-63.6%	1,628,784	1,428,006	-12.3%
Others	42,816,189	38,830,273	-9.3%	10,754,054	15,295,328	42.2%

*Source of Data: Trade Data Monitor, LLC*

**Figure 2: Chilean Raisin Monthly Export Volume (MT)**



Source of Data: Trade Data Monitor, LLC

**Attachments:**

No Attachments