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**Required Report:** Required - Public Distribution

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## **Report Name:** Raisin Annual

**Country:** Chile

**Post:** Santiago

**Report Category:** Raisins

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### **Report Highlights:**

Chilean raisins are almost exclusively produced from grapes deemed unsuitable for the export market at vineyards focused on fresh table grape production for export. In marketing year (MY) 2024/25, Post estimates that due to low area planted, raisin production will total 68,900 metric tons (MT), a 6.9 percent decrease from MY 2023/24. Chilean raisin exports are forecast to decrease by 7.6 percent to 66,000 MT. As table grape yields and quality levels are expected to be average in MY 2024/25, a lower share of table grape production will be turned to raisin production. Domestic consumption is forecast to increase by 1.5 percent to 3,300 MT, which aligns with a growing population.

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

Raisins Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jan 2022		Jan 2023		Jan 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	43025	0	39931	0	39500
Area Harvested (HA)	0	42000	0	39000	0	38500
Beginning Stocks (MT)	0	0	0	207	0	200
Production (MT)	0	67000	0	74040	0	68900
Imports (MT)	0	373	0	187	0	400
Total Supply (MT)	0	67373	0	74434	0	69500
Exports (MT)	0	63966	0	70984	0	66000
Domestic Consumption (MT)	0	3200	0	3250	0	3300
Ending Stocks (MT)	0	207	0	200	0	200
Total Distribution (MT)	0	67373	0	74434	0	69500
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

Source: Post estimates

### Area Planted:

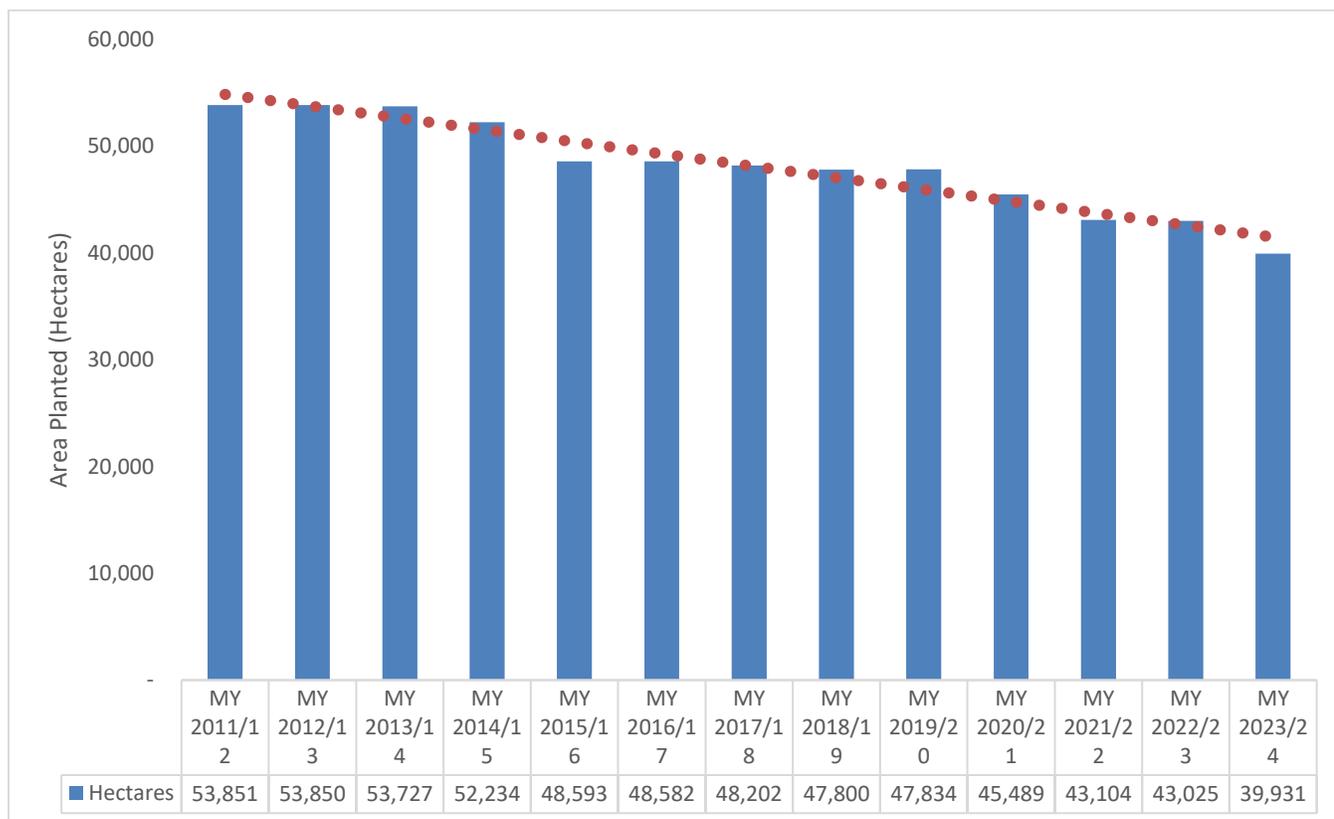
In MY 2024/25, Post estimates table grape planted area will decrease by 1.1 percent totaling 39,500 hectares (ha) (Table 1). In Chile, raisins are produced almost exclusively from orchards focused on fresh table grapes production for exports. Grapes that are not fit for the export market, are further processed for wine, juice, and raisin production. This has given Chilean raisins a good reputation in terms of size and quality.

When it comes to table grapes, area planted has been decreasing for over ten years due to low margins (Figure 1). Competition from other suppliers like Peru, and the low prices for traditional varieties such as crimson, flame, or red globe, among others, has pressured smaller table grape exporters to exit the market.

Increased drought also caused table grape production and planted area to decrease in recent years. Data shows a decrease in table grape area planted in all the production regions in Chile, from the *Atacama* region in the north of the country to the *O'Higgins* region in the central part of the country.

In the northern part of the country, the decrease in area planted is explained because of low prices and high production costs (labor, transport, and chemical products). In the central part of the country, area planted with table grapes was replaced by more profitable crops such as walnuts, cherries, and citrus, or by expansion of urban areas.

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



Source: ODEPA, 2024

**Production:**

In MY 2024/25 raisin production is projected to reach 68,900 MT a 6.9 percent decrease from MY 2023/24. These estimates are based on typical table grape yields and planted area decreasing to 39,500 ha (Table 1).

Raisin production in Chile is directly linked to fresh table grape production. Profits from raisin production are much lower than those obtained with fresh table grape exports. However, raisin production is a reliable and steady business which became an alternative for producers that own orchards with traditional varieties, such as Crimson seedless or Thompson seedless. In recent years, these varieties have not been in high demand.

In MY 2023/24 raisin production increased by 10.5 percent reaching 74,040 MT (see Table 2). This large increase in raisin production responds to an increase in the share of table grape production that was used for raisin production rather than exported. In MY 2023/24, Post estimates due to a relatively low-quality table grape harvest there was an increase in the availability of grapes for raisin production. Raisin production went from being 21.8 percent of table grape production in MY 2023/23 to 26.2

percent of table grape production in MY 2023/24 (Table 2). In MY 2024/25, with a typical harvest, post estimates that the production of raisins will constitute 25.4 percent of table grape production.

**Table 2: Chilean Table Grape Production**

<b>Production sector</b>	<b>MY 2022/23 (MT)</b>	<b>Share (%)</b>	<b>MY 2023/24 (MT)</b>	<b>Share (%)</b>	<b>MY 2024/25 (MT)</b>	<b>Share (%)</b>
Fresh Table Grapes	788,110	60.9%	651,500	55.0%	630,000	55.3%
Raisin production (fresh basis)	281,400	21.8%	310,968	26.2%	289,380	25.4%
<i>Raisins (dried basis)</i>	<i>67,000</i>		<i>74,040</i>		<i>68,900</i>	
Juice production	161,967	12.5%	161,000	13.6%	160,000	14.0%
Wine production	62,295	4.8%	62,000	5.2%	60,000	5.3%
<b>Total Production</b>	<b>1,293,772</b>	<b>100.0%</b>	<b>1,185,468</b>	<b>100.0%</b>	<b>1,139,380</b>	<b>100.0%</b>

*Source: Post estimates*

### **Consumption:**

In MY 2024/25, raisin consumption is estimated to increase by 1.5 percent to 3,300 MT driven by Chile’s population growth. Raisins are primarily consumed domestically as snacks and for confectionary products to include ice-cream, cookies, chocolate, and other various bakery items.

### **Stocks:**

Stocks are projected to remain flat at 200 MT in MY 2024/25. Chilean companies do not generally store raisins for large periods of time, since trade flows constantly throughout the year. Stocks correspond to raisins that were not sold between marketing years.

### **Trade:**

Post estimates that in MY 2024/25, due to a decrease in production, Chilean raisin exports will decrease by 7.6 percent to 66,000 MT (see Table 1). Additionally, since MY 2024/25 is expected to be a standard year in terms of table grape yields and quality, a lower share of table grape production will be used for raisin production.

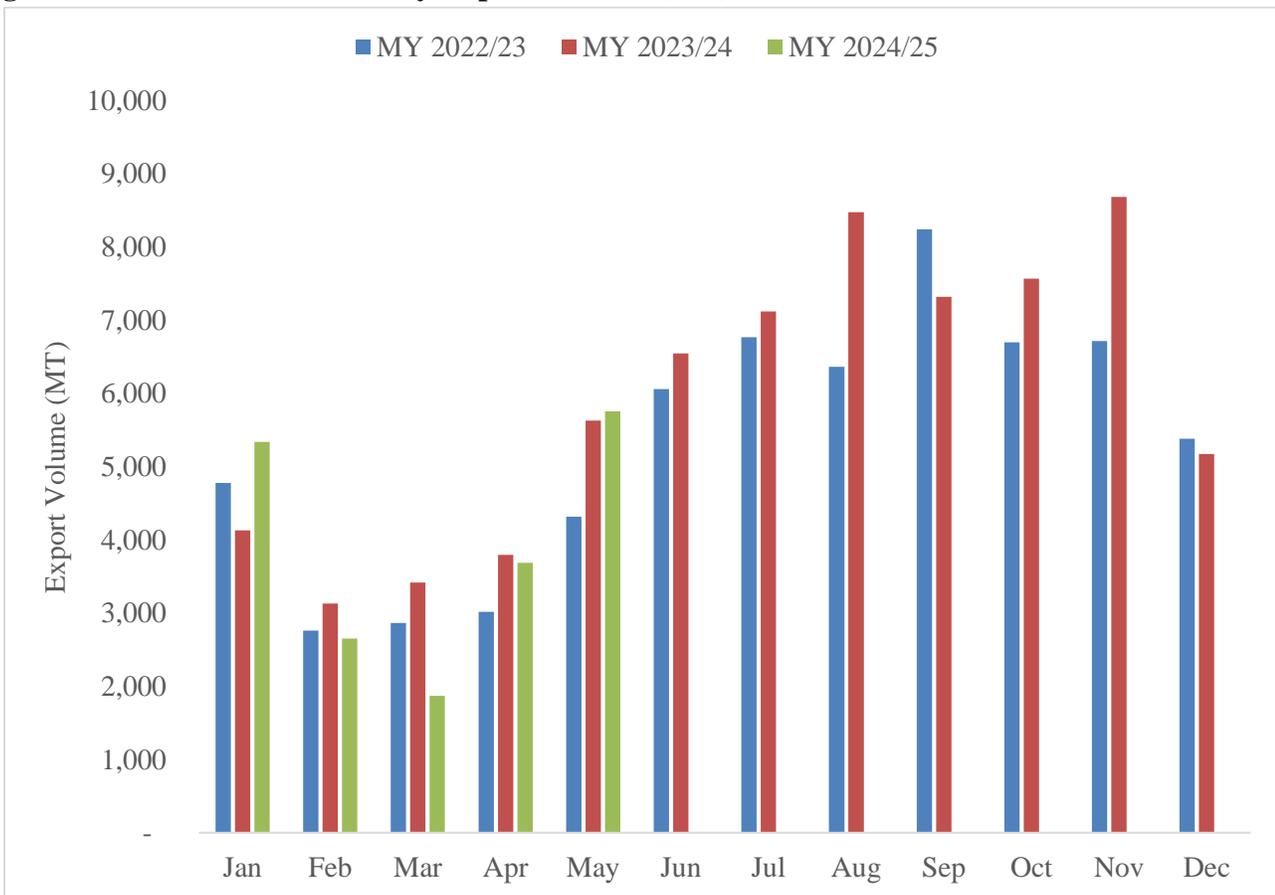
From January to May 2024, Chilean raisin exports to the world decreased by 4 percent in volume from the same period in 2023 reaching 19,302 MT (Table 3) and \$42.5 million (see Table 4).

In MY 2023/24, the top markets for Chilean raisin exports were the United States, the Netherlands, and Colombia. These markets have historically been of importance for Chilean raisins and differences year-

to-year are attributed to specific market conditions such as variations in the export price. Exports to the Chinese market have increased consistently since MY 2021/22 due to high demand and ranked as the fifth top market for Chilean raisins in MY 2023/24.

Chilean raisin exports are available throughout the year, and export volume peaks between August and November, just before the Chilean table grape harvest season starts. In MY 2023/24, monthly exports of raisins show a decrease particularly in February through May (Figure 2).

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



Source of Data: Trade Data Monitor, LLC

**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 2022/23</b>	<b>MY 2023/24</b>	<b>Variation (%)</b>	<b>2023</b>	<b>2024</b>	<b>Variation (%)</b>
_World	63,966	70,984	11.0%	20,099	19,302	-4.0%
United States	7,131	6,167	-13.5%	1,836	2,211	20.4%
Netherlands	3,093	4,763	54.0%	1,623	1,738	7.1%
Colombia	5,687	4,760	-16.3%	1,831	986	-46.1%
Peru	4,455	4,579	2.8%	661	914	38.3%
China	4,231	4,493	6.2%	892	1,280	43.5%
Brazil	3,590	4,288	19.4%	1,028	443	-56.9%
United Kingdom	2,715	3,593	32.3%	1,041	1,094	5.1%
Poland	1,161	3,158	172.0%	965	765	-20.7%
Venezuela	2,411	2,739	13.6%	96	167	74.0%
Mexico	3,632	2,600	-28.4%	1,036	423	-59.2%
Turkey	1,736	2,538	46.2%	611	239	-60.9%
Russia	1,348	1,871	38.8%	684	681	-0.4%
Spain	1,938	1,862	-3.9%	480	792	65.0%
Taiwan	1,613	1,621	0.5%	525	690	31.4%
Lithuania	1,147	1,506	31.3%	594	490	-17.5%
Others	18,078	20,446	13.1%	6,196	6,389	3.1%

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 2022/23</b>	<b>MY 2023/24</b>	<b>Variation (%)</b>	<b>2023</b>	<b>2024</b>	<b>Variation (%)</b>
The World	129,046,435	142,906,565	10.7%	40,039,104	42,463,945	6.1%
United States	13,860,575	12,024,328	-13.2%	3,431,037	4,708,906	37.2%
Netherlands	6,594,614	10,648,163	61.5%	3,470,743	4,383,940	26.3%
China	9,066,232	9,279,666	2.4%	1,824,888	2,810,748	54.0%
Peru	9,297,954	9,000,760	-3.2%	1,233,109	2,193,109	77.9%
Colombia	9,027,656	7,764,816	-14.0%	2,860,702	1,671,738	-41.6%
United Kingdom	5,264,899	7,284,297	38.4%	2,023,108	2,350,630	16.2%
Brazil	5,575,046	6,883,699	23.5%	1,523,224	695,170	-54.4%
Poland	2,352,273	5,973,638	154.0%	1,798,997	1,526,487	-15.1%
Turkey	3,689,541	5,425,766	47.1%	1,252,245	478,497	-61.8%
Venezuela	3,751,116	4,187,989	11.6%	153,137	270,070	76.4%
Mexico	6,008,844	4,161,157	-30.7%	1,576,878	747,862	-52.6%
Russia	2,765,323	4,147,899	50.0%	1,428,006	1,409,541	-1.3%
Spain	4,461,476	4,008,997	-10.1%	1,012,383	1,897,414	87.4%
Saudi Arabia	2,762,907	3,587,589	29.8%	1,747,959	337,049	-80.7%
Taiwan	3,732,698	3,495,844	-6.3%	1,162,093	1,661,138	42.9%
Others	40,835,281	45,031,957	10.3%	13,540,595	15,321,646	13.2%

Source of Data: Trade Data Monitor, LLC

**Attachments:**

No Attachments