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Chile

Fresh Deciduous Fruit

Semi-Annual

2000

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Report Highlights: Chile's apple and pear export forecasts are sharply lower as production of both fell significantly in MY2000 (Jan-Dec) due to adverse weather conditions. At the same time, table grape production and exports have made a significant comeback.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Chile's supplies of fresh apples and pears are expected to fall significantly in MY2000 (Jan-Dec) compared to the previous year, mainly due to adverse weather conditions in most growing areas last spring. For table grapes, however, weather has been excellent and output is expected to be significantly greater than the previous year. Consequently, exports of apples and pears are expected to fall, while shipments of table grapes will be much larger than both last year and our earlier forecast.

Fresh Apples

Production

Last spring's adverse weather conditions had a greater negative effect on total apple production than earlier expected for MY2000 (Jan-Dec). As a result, the new production forecast has been lowered by nearly 20 percent.

Consumption

There are no official data on domestic fresh apple consumption. The figures shown in the PS&D table are estimated as a residual of production, minus apples destined for processing and known exports. The MY2000 consumption forecast has been lowered slightly.

Trade

A significant fall in production during the MY2000 season will likely result in smaller export volumes compared to last season. The new export forecast has been lowered sharply by nearly 22 percent. In addition, the export estimate for last season has been lowered slightly based on more recent information. The Netherlands and Columbia were the principal export destinations last season, followed by the U.S. which took about 8 percent of total shipments.

On the import side, the new forecast predicts fresh apple imports of 200 MT based on the new higher estimate for last season. The U.S. is currently the sole supplier of apples to Chile, and requests for increased U.S. access are expected to bear fruit in the foreseeable future. Imports currently account for less than one-half percent of total supply.

Prices

Stronger export demand, together with shorter supplies, have had a positive effect on prices in MY2000. Consequently, an increase in export prices is expected when compared to previous years.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	39800	39800	40000	40000	40000	40000
Area Harvested	31200	31200	31800	31800	32400	32400
Bearing Trees	12792	12792	12858	12858	13100	13100
Non-Bearing Trees	3680	3680	3697	3697	3455	3455
Total Trees	16472	16472	16555	16555	16555	16555
Commercial Production	960000	960000	1000000	1000000	919200	750000
Non-Comm. Production	10000	10000	10000	10000	10000	10000
TOTAL Production	970000	970000	1010000	1010000	929200	760000
TOTAL Imports	218	218	160	203	0	200
TOTAL SUPPLY	970218	970218	1010160	1010203	929200	760200
Domestic Fresh Consump	90000	90000	98000	100000	98000	95100
Exports, Fresh Only	538000	538000	539000	522000	510000	400000
For Processing	342218	342218	373160	388203	321200	265100
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	970218	970218	1010160	1010203	929200	760200

Export Trade Matrix

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Apples		
Time period	Jan-Dec	Units:	M.T.
Exports for:	1998		1999
U.S.	38533	U.S.	44100
Others		Others	
Netherlands	72855	Netherlands	77347
Colombia	51722	Colombia	47156
Peru	40081	Saudi Arabia	36679
Ecuador	37334	Mexico	35009
Saudi Arabia	35409	Spain	32735
Venezuela	30488	Venezuela	27874
Mexico	26315	U.K.	26111
Spain	22522	Peru	24678
United Arab E.	20373	Ecuador	18538
U.K.	18360	Italy	
Total for Others	355459		326127
Others not Listed	144039		151488
Grand Total	538031		521715

Import Trade Matrix

Import Trade Matrix			
Country	Chile		
Commodity	Fresh Apples		
Time period	Jan-Dec	Units:	M.T.
Imports for:	1998		1999
U.S.	218	U.S.	203
Others		Others	
Total for Others	0		0
Others not Listed			
Grand Total	218		203

Fresh Table Grapes

Production

As predicted, table grape output in MY2000 is expected to be significantly larger than last year, mainly due to good weather conditions in most grape-growing areas. The new larger forecast would mark a 3-year high.

Consumption

The MY2000 consumption forecast is unchanged but represents a 3-year high based on larger supplies. Domestic consumption accounts for only about 10 percent of total supplies, while processing accounts for another 30 percent.

Trade

With the larger total output, table grape exports are now forecast to be substantially greater than earlier projections and are expected to reach a 3-year high. Last year's export estimate has been lowered slightly based on more recent information. The U.S. is the largest export market and took 58 percent of last season's total shipments.

Chile's table grape imports for MY2000 are now forecast at 100 MT based on the higher revised import estimate for last year. The U.S. is the sole supplier of table grapes to Chile.

Prices

Average export prices through July 2000 increased slightly again from \$849 per metric ton FOB to \$865 per metric ton, reflecting a stronger export demand for grapes.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	43786	43786	43790	43790	43800	43800
Area Harvested	39250	39250	39300	39300	39400	39400
Commercial Production	845000	845000	810000	810000	890000	930000
Non-Comm. Production	5000	5000	5000	5000	5000	5000
TOTAL Production	850000	850000	815000	815000	895000	935000
TOTAL Imports	121	121	60	97	50	100
TOTAL SUPPLY	850121	850121	815060	815097	895050	935100
Domestic Fresh Consump	92000	92000	90000	93000	98000	98000
Exports, Fresh Only	490258	490258	480000	473525	520000	568000
For Processing	267863	267863	245060	248572	277050	269100
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	850121	850121	815060	815097	895050	935100

Export Trade Matrix

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	M.T.
Exports for:	1998		1999
U.S.	263348	U.S.	273932
Others		Others	
Netherlands	39478	Netherlands	44324
China	32231	China	30883
U.K.	26744	U.K.	28581
Brazil	22502	Mexico	19018
Mexico	13485	Peru	9188
Peru	9053	Brazil	6782
Belgium	4666	So. Korea	5798
Japan	3756	Belgium	5167
United Arab E.	3632	Japan	5019
Venezuela	3508	Germany	4395
Total for Others	159055		159155
Others not Listed	67856		40438
Grand Total	490259		473525

Import Trade Matrix

Import Trade Matrix			
Country	Chile		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	M.T.
Imports for:	1998		1999
U.S.	121	U.S.	97
Others		Others	
Total for Others	0		0
Others not Listed			
Grand Total	121		97

Pears

Production

As with apples, Chile's pear production was also affected by adverse weather conditions and the MY2000 production forecast has been lowered accordingly to the lowest level in three years.

Consumption

As with other fresh fruits, domestically consumed pears are mainly export rejects. Most of the pears are consumed fresh, because only a few existing varieties in Chile can be processed for canned pears or juice concentrates. The consumption forecast has been raised modestly based on lower export prospects.

Trade

As a result of a smaller harvest, MY2000 pear shipments are now expected to be sharply lower than earlier projections and will likely represent a 3-year low. The largest export market continues to be the Netherlands, followed by the U.S. which took 22 percent of total shipments last season. Chile does not currently import fresh pears from any source.

Prices

There are no changes observed on the average export prices of pears during the first seven months when compared to the same period of time last year.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	11840	11840	11840	11840	11840	11840
Area Harvested	10813	10813	10820	10820	10890	10890
Bearing Trees	5210	5210	5240	5240	5274	5274
Non-Bearing Trees	380	380	350	350	316	316
Total Trees	5590	5590	5590	5590	5590	5590
Commercial Production	256000	256000	256500	256500	256500	235000
Non-Comm. Production	2000	2000	2000	2000	2000	2000
TOTAL Production	258000	258000	258500	258500	258500	237000
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	258000	258000	258500	258500	258500	237000
Domestic Fresh Consump	58500	58500	59500	59500	60000	65000
Exports, Fresh Only	153000	153000	156500	156400	156500	125000
For Processing	46500	46500	42500	42600	42000	47000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	258000	258000	258500	258500	258500	237000

Export Trade Matrix

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Pears		
Time period	Jan-Dec	Units:	M.T.
Exports for:	1998		1999
U.S.	23601	U.S.	33862
Others		Others	
Netherlands	45939	Netherlands	39174
Colombia	10628	Peru	11056
Belgium	11842	Colombia	9662
Italy	9769	Venezuela	9081
Venezuela	8136	Italy	8577
Peru	7516	Belgium	6252
Spain	4418	Spain	6066
Russia	3764	Saudi Arabia	3301
Brazil	3299	Germany	3287
France	3157	Portugal	3019
Total for Others	108468		99475
Others not Listed	21114		23064
Grand Total	153183		156401