Required Report: Required - Public Distribution **Date:** June 19, 2024

Report Number: CI2024-0011

Report Name: Citrus Semi-Annual

Country: Chile

Post: Santiago

Report Category: Citrus

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Report Highlights:

In marketing year (MY) 2023/24, with an increasing trend in area planted and assuming regular yields, Post estimates lemon production to grow by 6.7 percent and reach 175,000 (MT) metric tons. Chilean lemon exports will increase 8.8 percent, totaling 74,000 metric tons. In MY 2023/24, Post estimates lower orange area planted due to continued tight margins. As such, Chilean orange production will decrease by 1.6 percent and total 177,000 metric tons. Orange exports will follow and decrease by 3.2 percent totaling 92,000 metric tons. In MY 2023/24, due to drought in the top Chilean mandarin-producing region, mandarin production will decrease by 9.7 percent and total 242,000 metric tons. Likewise, mandarin exports will drop to 211,000 MT which represents a 10.6 percent decrease from MY 2023/24.

Commodities:
Lemons, Fresh

Table 1: Production, Supply and Distribution

Lemons/Limes, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Apr 2022		Apr 2023		Apr 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	8040	8040	8080	8081	8150	8150
Area Harvested (HECTARES)	8000	8000	8000	8000	8050	8050
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	136	136	164	164	175	175
Imports (1000 MT)	15	12	12	13	10	10
Total Supply (1000 MT)	151	148	176	177	185	185
Exports (1000 MT)	56	56	68	68	74	74
Fresh Dom. Consumption (1000 MT)	86	83	98	99	100	100
For Processing (1000 MT)	9	9	10	10	11	11
Total Distribution (1000 MT)	151	148	176	177	185	185
(HECTARES), (1000 TREES), (1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

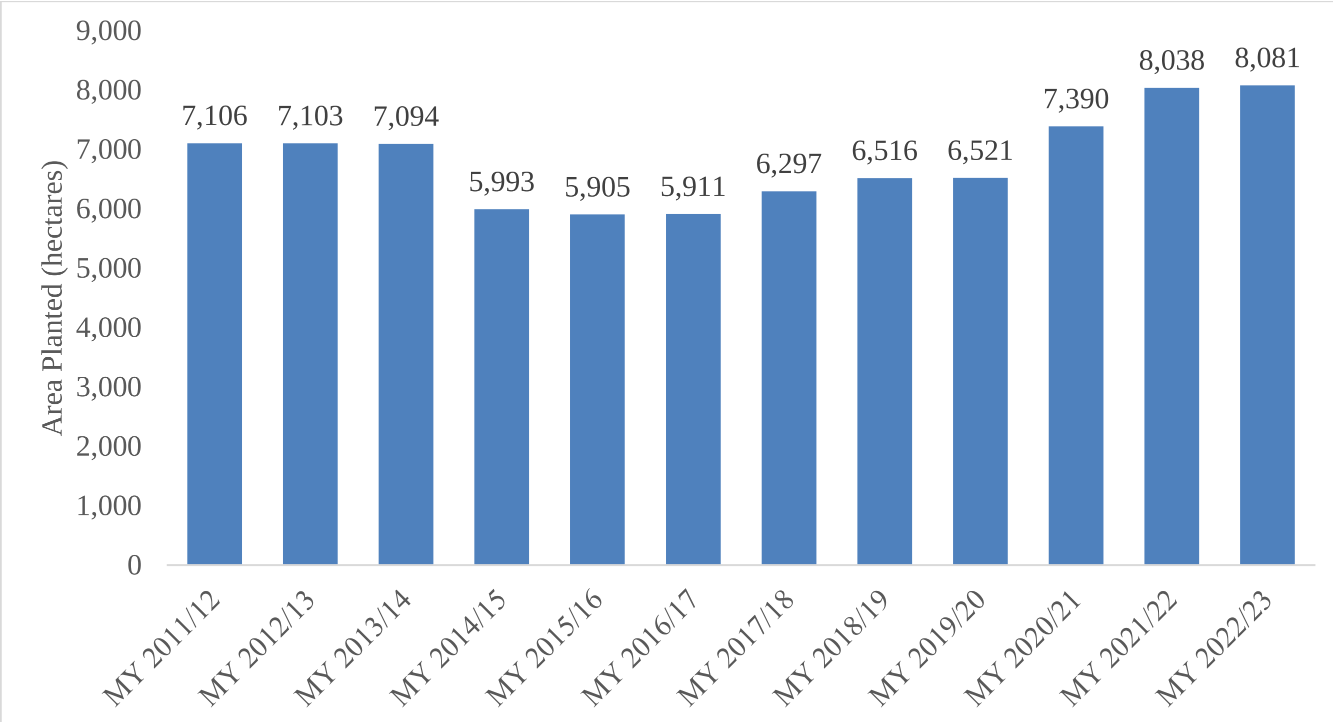
Production:

In MY 2023/24, due to the increase in area planted and assuming regular yields, Post estimates lemon production to grow by 6.7 percent and reach 175,000 metric tons. In MY 2023/24, due to high profits, lemon area planted will reach 8,150 hectares (ha). This represents a one percent increase from MY 2022/23 (Figure 1). Farmers found in lemon production and exports a profitable alternative to other crops such as avocado because of higher prices and low water requirements. Lemon area planted in Chile grew from 5,911 hectares in MY 2016/17 to 8,081 hectares in MY 2022/23.

The lemon area planted grew in all producing regions, which span from the *Coquimbo* region in the northern part of the country to the *O'Higgins* region towards Chile's central-south. However, over 40 percent of the area planted is in the *Metropolitana* region, in the central part of Chile (Figure 2).

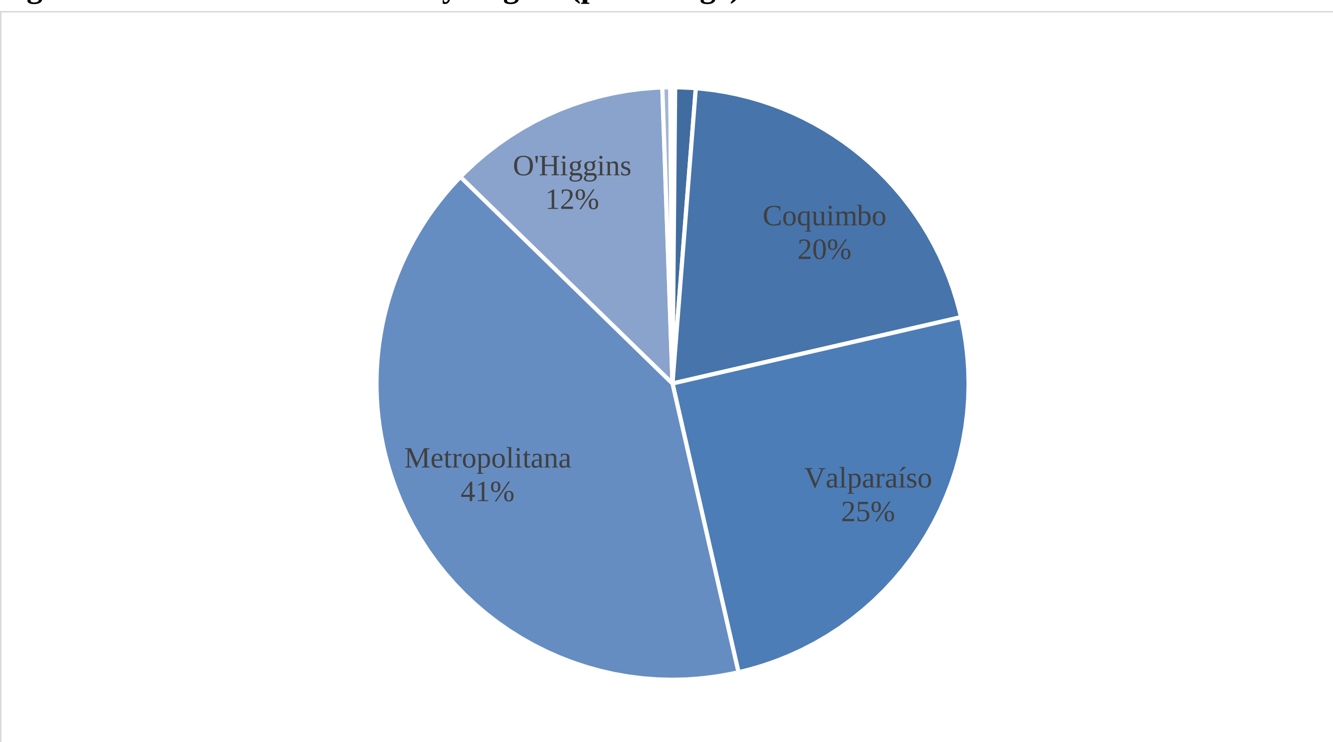
Chile produces lemons for the domestic market in the summer months, between December and March, when prices are high. During the Chilean winter, between June and September, international prices are higher than domestic prices, and most Chilean producers export lemons to North America, Europe, and Asia.

Figure 1: Lemon Area Planted (hectares)



Source: ODEPA, 2024

Figure 2: Lemon Area Planted by Region (percentage)



Source: ODEPA, 2024

Consumption:

In MY 2023/24, Post estimates domestic consumption of lemons will increase by one percent to 100,000 MT, following the growth in population. Domestic lemon consumption represents 57 percent of commercial production. Consumption peaks between December and March when the domestic supply decreases.

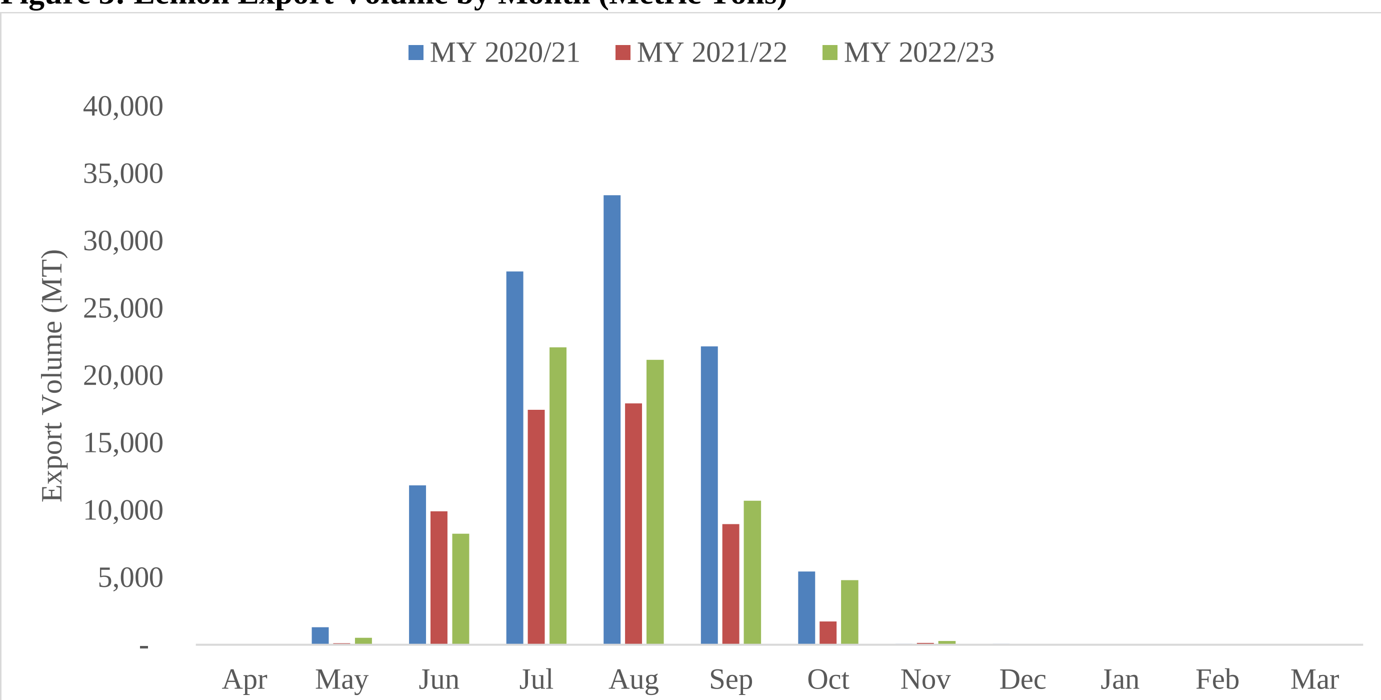
In MY 2023/24, consumption of lemons for processing will total 11,000 MT, a 10 percent increase over MY 2022/23, following the increase in production. Lemons are processed to produce juice, essential oils, or concentrates for confectionary.

Trade:

In MY 2023/24, due to an increase in production, Post estimates exports to increase by 8.8 percent and reach 74,000 MT. The top market for Chilean lemons is the United States. In MY 2022/23, Chile exported 61.5 percent of lemon export volume to the United States. In MY 2022/23, other top markets for Chilean lemons were Japan, South Korea, and the Netherlands.

In Chile, the lemon marketing year starts April with the beginning of the harvest season. The bulk of exports takes place between June and September each year and peaks in July or August depending on the climatic and market conditions (Figure 3).

Figure 3: Lemon Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 2: Lemon and Limes Export Volume to the World (MT)

Commodity: 080550, Lemons And Limes, Fresh Or Dried							
Partner Country	Marketing Year (MT)						Annual Variation MY 2022/23 (%)
	MY 2017/18	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	
The World	88,315	90,286	96,606	101,996	56,217	67,794	20.6%
United States	56,116	55,972	54,458	65,682	31,222	41,672	33.5%
Japan	18,285	20,170	18,705	17,056	15,578	17,076	9.6%
South Korea	3,931	3,792	5,343	4,999	4,423	5,593	26.5%
Netherlands	4,553	5,225	4,575	4,630	901	1,634	81.4%
Italy	987	1,148	1,298	617	209	576	175.6%
Spain	1,218	1,606	966	858	689	432	-37.3%
Austria	0	0	0	0	0	288	
China	0	0	5,657	6,532	1,558	124	-92.0%
Dominican Republic	33	38	30	56	54	97	79.6%
Colombia	38	80	88	54	58	93	60.3%
Others	3,154	2,255	5,486	1,512	1,525	209	-86.3%

Source: Trade Data Monitor, LLC

In MY 2022/23, Chile imported 13,200 MT of lemons. The top supplier of lemons is Peru, followed by Brazil, Colombia, and the United States (Table 3). Lemon imports from Brazil have grown consistently since MY 2020/21 and represented 30.6 percent of import volume in MY 2022/23.

Table 3: Lemon and Limes Import Volume from the World (MT)

Chile Imports from the World							
Commodity: 080550, Lemons And Limes, Fresh Or Dried							
Partner Country	Marketing Year (MT)						Annual Variation MY 2022/23 (%)
	MY 2017/18	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	
The World	13,861	11,466	11,356	12,703	12,267	13,200	7.6%
Peru	7,980	8,943	8,027	10,350	8,567	7,837	-8.5%
Brazil	0	0	0	202	3,057	4,035	32.0%
Colombia	1,611	941	2,204	1,827	500	1,177	135.4%
United States	4,249	1,582	1,116	324	142	149	4.9%
Others	21	-	9	-	1	2	100.0%

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Commodities:

Oranges, Fresh

Table 4: Production, Supply and Distribution

Oranges, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Apr 2022		Apr 2023		Apr 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	6371	6371	6362	6362	6300	6300
Area Harvested (HECTARES)	6180	6180	6200	6200	6150	6150
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	164	164	179	180	175	177
Imports (1000 MT)	3	2	3	1	3	2
Total Supply (1000 MT)	167	166	182	181	178	179
Exports (1000 MT)	86	81	95	95	90	92
Fresh Dom. Consumption (1000 MT)	71	75	76	75	77	76
For Processing (1000 MT)	10	10	11	11	11	11
Total Distribution (1000 MT)	167	166	182	181	178	179
(HECTARES), (1000 TREES), (1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

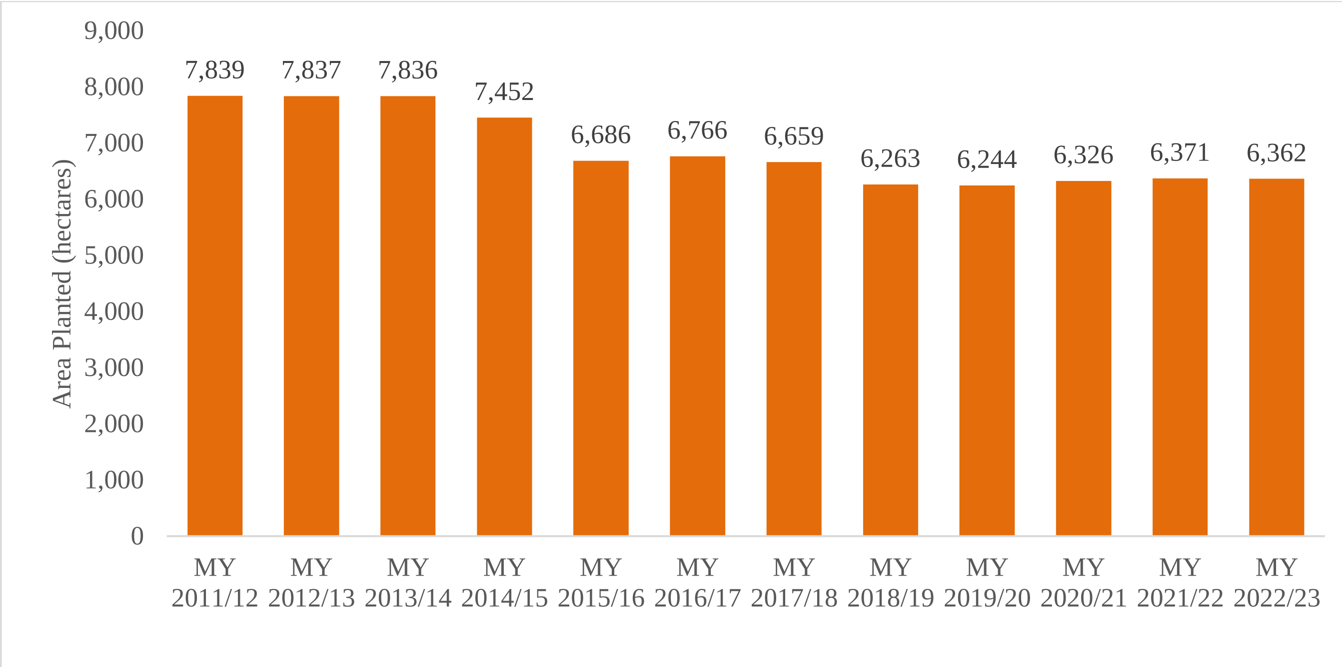
Source: Post Estimates

Production:

In MY 2023/24, orange production will decrease by 1.6 percent and total 177,000 MT, assuming regular yields and a one percent reduction in area planted to 6,300 hectares. In MY 2022/23, orange area planted totaled 6,362 hectares, a 0.14 percent decrease from MY 2021/22 (Figure 4).

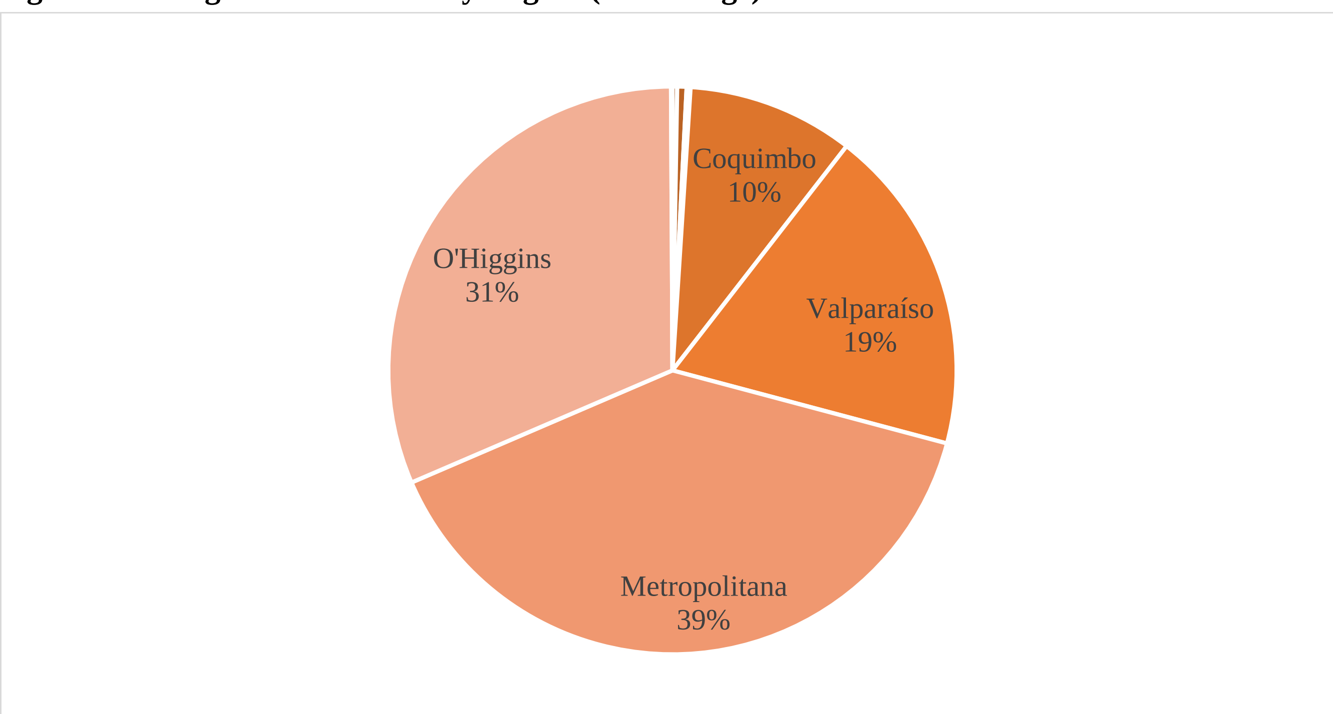
The *Metropolitana* and the *O'Higgins* regions, in the central part of the country, are the top orange producing regions, holding near 70 percent of the orange area planted in Chile (Figure 5). Area planted in the *Metropolitana* and the *O'Higgins* regions increased in the past three marketing years by 8.5 percent and 13.5 percent, respectively. The *Coquimbo* and *Valparaíso* regions hold near 30 percent of the area planted. In these two regions, area planted with oranges has gradually decreased as producers shifted to mandarins and lemons because of their higher profitability.

Figure 4: Oranges Area Planted (hectares)



Source: ODEPA, 2024

Figure 5: Oranges Area Planted by Region (Percentage)



Source: ODEPA, 2024

Consumption:

Orange consumptions consists of fresh domestic consumption and processing for orange juice. In MY 2023/24, fresh domestic consumption will increase by 1.3 percent to 76,000 MT, following population growth.

Post estimates MY 2023/24 consumption for processing, at 11,000 MT, unchanged from MY 2022/23. In MY 2023/24, total domestic consumption, fresh and for processing, will reach 87,000 MT, which represents 49 percent of commercial production.

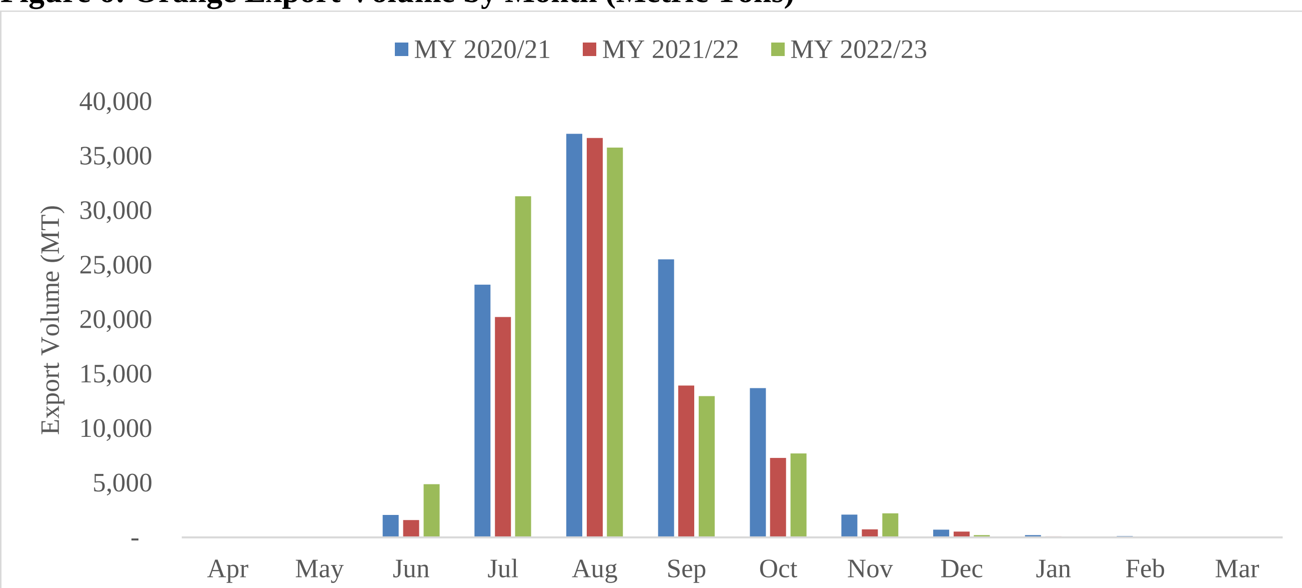
Trade:

In MY 2023/24, Post estimates exports to decrease by 3.2 percent and total 92,000 MT due to a decrease in production. In Chile, the orange marketing year starts April with the beginning of the harvest season. The bulk of Chilean orange exports is between July and September each year and peaks around August (Figure 6).

In MY 2022/23, orange exports increased by 17.3 percent from MY 2021/22 and totaled 95,188 MT (Table 5). The top market for Chilean oranges is the United States. In MY 2022/23, orange exports to the United States totaled 85,461 MT which represented 90 percent of the export volume. Chile exports oranges to various other countries such as Ecuador, the Dominican Republic, and Brazil.

In MY 2022/23, Chile imported 1,396 MT of oranges, an 18.1 decrease from MY 2021/22 (Table 6). The United States was the top supplier of oranges, with 99 percent market share. The peak import season is during the Chilean summer, between December and May.

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



Source: Trade Data Monitor, LLC

Table 5: Orange Export Volume to the World (MT)

Commodity: 080510, Oranges, Fresh							
Partner Country	Year Ending Series (UOM1: T)						Annual Variation MY 2022/23 (%)
	MY 2017/18	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	
The World	100,617	99,981	89,946	104,714	81,062	95,118	17.3%
United States	92,394	92,046	81,928	96,319	73,916	85,461	15.6%
Ecuador	1,076	1,005	1,025	1,596	1,258	1,587	26.2%
Dominican Republic	301	492	718	1,309	1,559	1,546	-0.8%
Brazil	889	985	324	91	621	1,104	77.8%
Canada	1,030	1,601	1,883	898	670	1,100	64.2%
Guatemala	557	432	674	890	644	1,014	57.5%
Costa Rica	601	664	812	774	638	701	
Panama	454	525	501	564	536	580	8.2%
Netherlands	412	414	83	65	0	537	-
South Korea	1,603	769	575	468	209	453	116.7%
Others	1,300	1,048	1,423	1,740	1,011	1,035	2.4%

Source: Trade Data Monitor, LLC

Table 6: Orange Import Volume from the World (MT)

Commodity: 080510, Oranges, Fresh							
Partner Country	Year Ending Series (UOM1: T)						Annual Variation MY 2022/23 (%)
	MY 2017/18	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	
The World	1,835	1,894	3,726	3,107	1,704	1,396	-18.1%
United States	1,831	1,894	3,726	2,983	1,555	1,395	-10.3%
Peru	-	-	-	18	-	1	-
Others	4	-	-	106	149	-	-100.0%

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Commodities:
Tangerines/Mandarins, Fresh

Table 7: Production, Supply and Distribution

Tangerines/Mandarins, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Apr 2022		Apr 2023		Apr 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	11194	11194	11184	11184	12000	12000
Area Harvested (HECTARES)	11000	11000	11000	11000	11800	11800
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	158	158	268	268	287	242
Imports (1000 MT)	1	1	1	1	0	1
Total Supply (1000 MT)	159	159	269	269	287	243
Exports (1000 MT)	131	131	233	236	250	211
Fresh Dom. Consumption (1000 MT)	25	25	33	30	34	29
For Processing (1000 MT)	3	3	3	3	3	3
Total Distribution (1000 MT)	159	159	269	269	287	243
(HECTARES), (1000 TREES), (1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

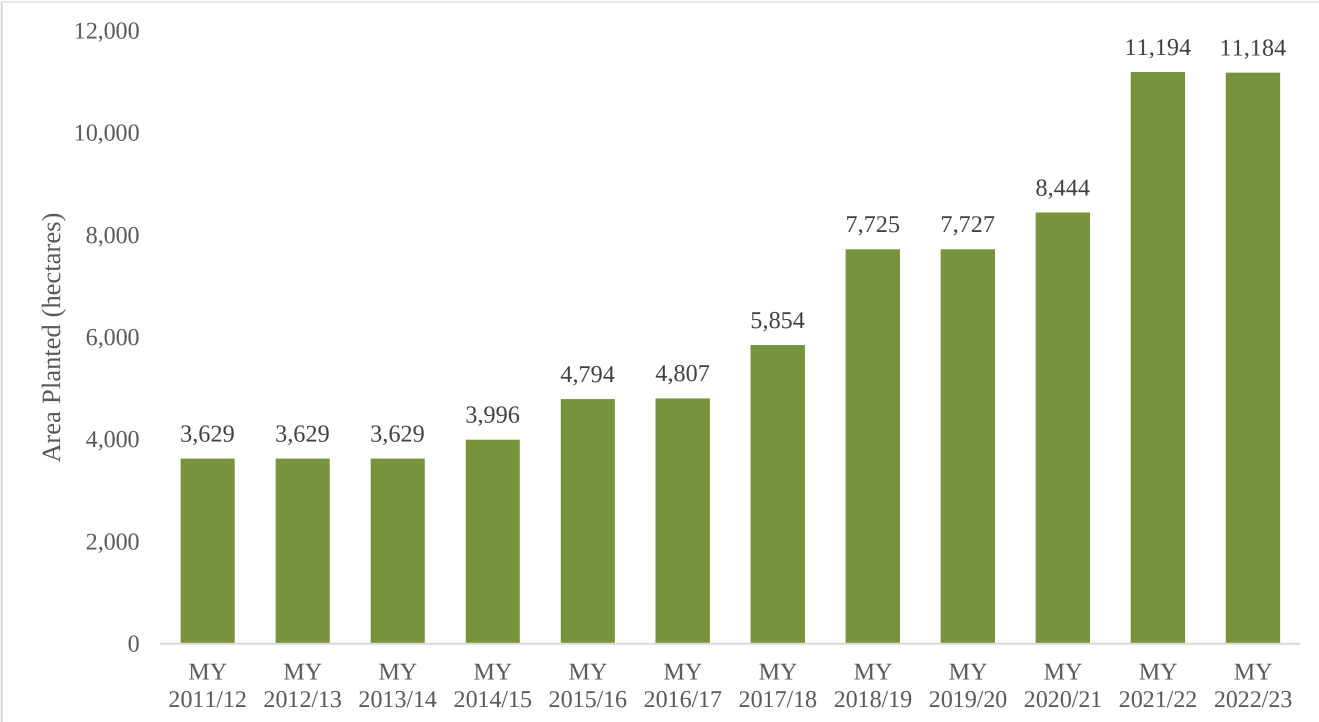
Production:

In MY 2023/24, due to continued dry weather in the *Coquimbo* region, Post projects that production will decrease by 9.7 percent and total 242,000 metric tons. (Table 7). During the past marketing years, rainfall in the central and south part of the country has been abundant, breaking a 13-year period of drought. MY 2022/23 had a winter with abundant rainfall, which favored overall mandarin production that year. However, in the *Coquimbo* region, in the northern part of the country, drought persists, and water availability for irrigation is currently insufficient. Moreover, until June 2024, large water reservoirs used for irrigation of citrus in *Coquimbo* region were below ten percent of their capacity.

Due to high profits, mandarin area planted grew significantly at the national level in the past ten marketing years (Figure 7). Area planted with mandarins increases nearly 1,000 hectares per year. In MY 2023/24, Post estimates that area planted will reach 12,000 hectares.

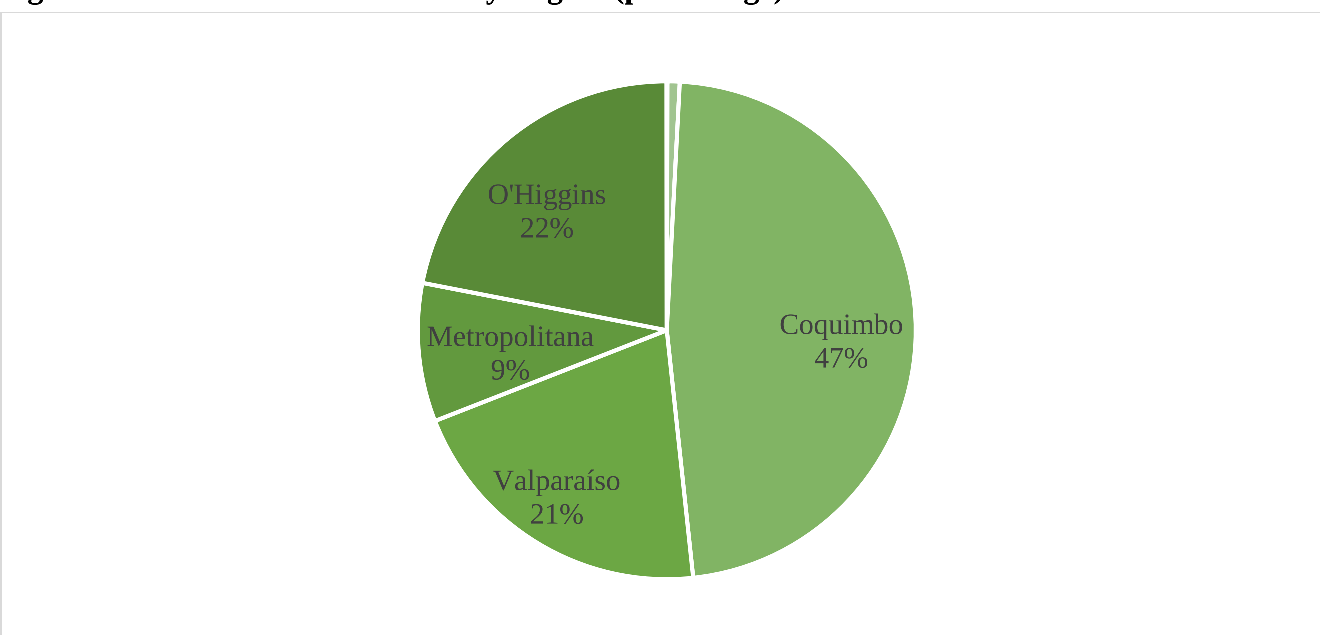
The *Coquimbo* region is the top mandarin producing region in Chile, holding near half of the area planted with mandarins. Thus, drought happening in that region has a large impact on Chile's mandarin production. The *Metropolitana*, *O'Higgins* and the *Valparaiso* regions, in the central part of the country, hold the remaining area planted (Figure 8).

Figure 7: Mandarin Area Planted (hectares)



Source: ODEPA, 2024

Figure 8: Mandarin Area Planted by Region (percentage)



Source: ODEPA, 2024

Consumption:

In MY 2023/24, due to lower production, Post projects fresh domestic consumption will decrease by 3.3 percent and total 29,000 metric tons. Mandarin consumption for processing is mainly used in juice and will remain unchanged at 3,000 metric tons.

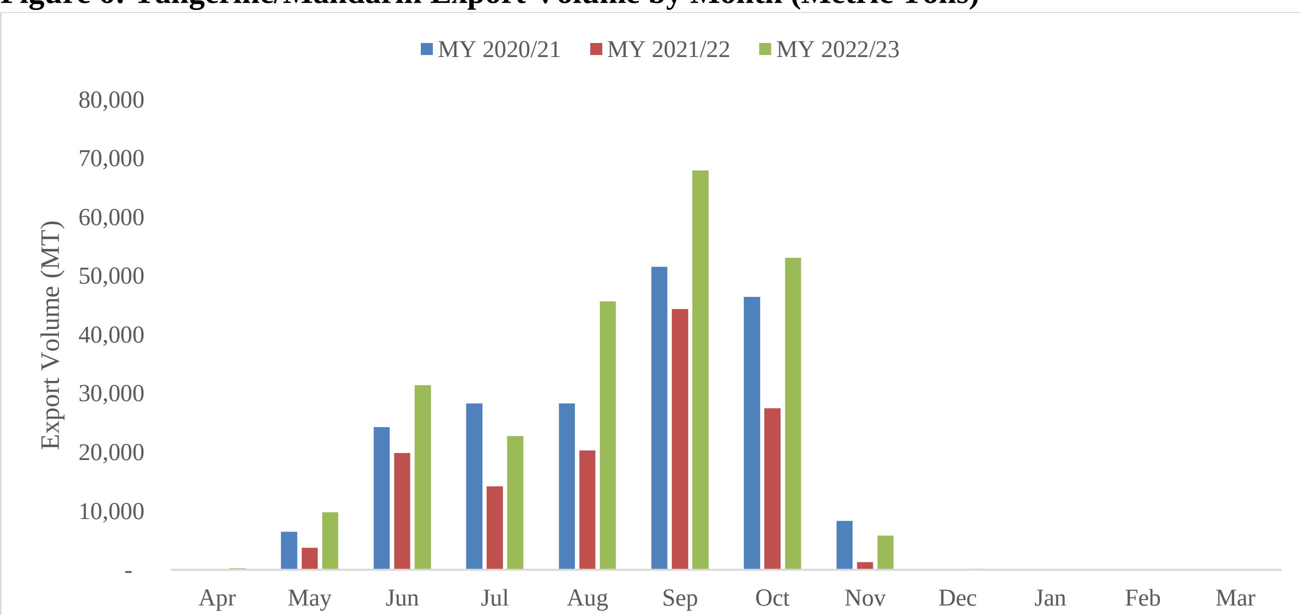
Trade:

In MY 2023/24, due to the decrease in production, Post estimates that exports will decrease by 10.6 percent totaling 211,000 metric tons. The top export market for Chilean mandarin exports is the United States, which received 94 percent of the export volume in MY 2022/23. Other markets for Chilean mandarins are Canada, Spain, and Mexico.

In MY 2022/23, due to high yields, Chile exported 236,907 MT of mandarins to the world, an 80.3 percent increase over MY 2021/22 (Table 8). Chile exports mandarins from April until December. However, Chilean mandarin exports peak around September each year (Figure 9). MY 2022/23 exports were higher during the peak export months because of high production volumes that resulted from abundant rainfall and sufficient water for irrigation that year.

Chilean import volume of mandarins does not surpass 1,000 MT per year. In MY 2022/23, Chile imported 613 MT of mandarins, a 16 percent increase from MY 2021/22. The United States was the top supplier of mandarins with a 45 percent market share (Table 9).

Figure 6: Tangerine/Mandarin Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 8: Tangerine/Mandarin Export Volume to the World (MT)

Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids							
Partner Country	**Marketing Year (MT)**						**Annual Variation MY 2022/23 (%)**
	MY 2017/18	**MY 2018/19**	**MY 2019/20**	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	
The World	170,230	144,303	182,337	193,821	131,363	236,907	80.3%
United States	163,287	135,299	172,286	183,957	128,468	223,532	74.0%
Canada	4,036	3,449	3,561	2,867	493	2,418	390.5%
Spain	1	0	8	0	179	1,805	908.4%
Mexico	0	0	0	0	0	1,802	
Russia	0	69	207	385	92	1,258	1267.4%
Netherlands	514	1,174	814	946	68	1,084	1494.1%
Puerto Rico	519	401	776	951	776	1,072	38.1%
United Kingdom	1,412	2,841	1,632	2,795	193	756	291.7%
Dominican Republic	167	253	340	599	582	747	28.4%
Guatemala	14	22	44	60	28	388	1285.7%
Others	280	795	2,669	1,261	484	2,045	322.5%

Source: Trade Data Monitor, LLC

Table 9: Tangerine/Mandarin Import Volume from the World (MT)

Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids							
Partner Country	**Marketing Year (MT)**						**Annual Variation MY 2022/23 (%)**
	MY 2017/18	**MY 2018/19**	**MY 2019/20**	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	
The World	682	699	695	588	529	613	16%
United States	574	613	532	305	419	277	-34%
Peru	108	86	141	283	110	177	61%
Others	0	0	0	0	0	159	

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Attachments:

No Attachments