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Chile

Fresh Deciduous Fruit

Semi-Annual

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Report Highlights:

Chile's apple and pear production and export forecast for MY2000 are unchanged, but are significantly higher than last year due to good weather conditions. At the same time, the table grape forecast have been lowered due to reports of smaller yields.

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 be larger in MY2000 (Jan-Dec 2001) compared to the previous year, mainly due to good weather conditions in most growing areas last spring. For table grapes, weather has also been excellent but output has not expanded as previously expected due to smaller yields. Consequently, exports of apples and pears are expected to increase slightly, while shipments of table grapes will be less than both last year and our earlier forecast.

Fresh Apples

Production

The production forecast for MY 2000 (Jan-Dec 2001) is unchanged. Excellent weather conditions for apple production during most of last year's growing season had a positive effect on total output, as foreseen in our earlier report (CI1001).

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.

Trade

A significant increase in production during the MY2000 season will result in an expansion of export volumes compared to last season. 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. Washington, Oregon and Idaho are now approved for shipments to Chile. Imports currently account for less than one-half percent of total supply. The current import tariff rate is 8 percent, which fall to 7 percent next year and finish at 6 percent in 2003 unless the current negotiations for a U.S.-Chile free trade agreement result in a lower rate.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	40000	40000	40000	40000	40000	40000
Area Harvested	31800	31800	32400	32400	34000	33000
Bearing Trees	12858	12858	13100	13100	13750	13660
Non-Bearing Trees	3697	3697	3455	3455	2805	2897
Total Trees	16555	16555	16555	16555	16555	16557
Commercial Production	1000000	1000000	750000	750000	990000	990000
Non-Comm. Production	10000	10000	10000	10000	10000	10000
TOTAL Production	1010000	1010000	760000	760000	1000000	1000000
TOTAL Imports	203	203	150	60	100	100
TOTAL SUPPLY	1010203	1010203	760150	760060	1000100	1000100
Domestic Fresh Consump	100000	100000	98050	98360	115000	115000
Exports, Fresh Only	522000	522000	415000	387700	520100	520100
For Processing	388203	388203	247100	274000	365000	365000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	1010203	1010203	760150	760060	1000100	1000100

Export Trade Matrix

Import Trade Matrix			
Country	Chile		
Commodity	Fresh Apples		
Time period		Units:	
Imports for:			1
U.S.		U.S.	
Others		Others	
Total for Others	0		0
Others not Listed			
Grand Total	0		0

Fresh Table Grapes

Production

Table grape output in MY2000 (Jan-Dec 2001) expanded slightly less than expected, resulting in a modest reduction in the production and export forecast. Industry sources have indicated that in spite of good weather conditions in most grape-growing areas, the total number of bunches per vine and smaller size than expected resulted in lower total volume. Nonetheless, good quality was obtained which is expected to result in increased economic returns.

Consumption

The MY2000 consumption forecast has been revised slightly downward, but represents a 3-year high based on relatively larger supplies. Domestic consumption accounts for only about 10 percent of total supplies, while processing accounts for another 30 percent.

Trade

With the smaller total output, table grape exports are now forecast to be slightly lower than earlier projected. The U.S. is the largest export market and took 61 percent of last season's total shipments.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	43790	43790	43800	43800	43900	44000
Area Harvested	39300	39300	39400	39400	40400	39500
Commercial Production	810000	810000	930000	930000	970000	950000
Non-Comm. Production	5000	5000	5000	5000	5000	5000
TOTAL Production	815000	815000	935000	935000	975000	955000
TOTAL Imports	97	97	0	16	50	50
TOTAL SUPPLY	815097	815097	935000	935016	975050	955050
Domestic Fresh Consump	93000	93000	97900	95000	98000	96000
Exports, Fresh Only	473525	473525	568000	596000	590000	580000
For Processing	248572	248572	269100	244016	287050	279050
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	815097	815097	935000	935016	975050	955050

Export Trade Matrix

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	M.T.
Exports for:	1999		2000
U.S.	273932	U.S.	364344
Others		Others	
Netherlands	44324	Netherlands	42713
China	30883	U.K.	33808
U.K.	28581	Mexico	27781
Mexico	19018	Hong Kong	22210
Peru	9188	Peru	11523
Brazil	6782	China	9386
So. Korea	5798	Brazil	8715
Belgium	5167	Japan	7857
Japan	5019	So. Korea	7811
Germany	4395	Venezuela	6830
Total for Others	159155		178634
Others not Listed	40438		53135
Grand Total	473525		596113

Pears

Production

As with apples, Chile's pear production also benefitted from good weather conditions as was foreseen in our initial projections. Consequently, the MY2000 (Jan-Dec 2001) production forecast is unchanged at this time.

Consumption

As with other Chilean 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. There is no change in the consumption forecast.

Trade

As a result of a slightly larger harvest relative to last year, the forecast for MY2000 pear shipments continues to be higher but is unchanged from our initial projection. The largest export market is still the Netherlands, followed by the U.S. which took 19 percent of total shipments last season.

PS&D Table

PSD Table						
Country	Chile					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	11840	11840	11840	11840	11840	10400
Area Harvested	10820	10820	10890	10890	10900	10100
Bearing Trees	5240	5240	5274	5274	5280	4800
Non-Bearing Trees	350	350	316	316	310	140
Total Trees	5590	5590	5590	5590	5590	4940
Commercial Production	256500	256500	235000	235000	247000	247000
Non-Comm. Production	2000	2000	2000	2000	2000	2000
TOTAL Production	258500	258500	237000	237000	249000	249000
TOTAL Imports	0	0	0	25	50	50
TOTAL SUPPLY	258500	258500	237000	237025	249050	249050
Domestic Fresh Consump	59500	59500	65000	65325	68050	68050
Exports, Fresh Only	156400	156400	125000	124700	130000	130000
For Processing	42600	42600	47000	47000	51000	51000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	258500	258500	237000	237025	249050	249050

Export Trade Matrix

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Pears		
Time period	Jan-Dec	Units:	M.T.
Exports for:	1999		2000
U.S.	33862	U.S.	23818
Others		Others	
Netherlands	39174	Netherlands	26380
Peru	11056	Colombia	11722
Colombia	9662	Venezuela	10208
Venezuela	9081	Italy	9044
Italy	8577	Peru	7392
Belgium	6252	Spain	4417
Spain	6066	Brazil	4282
Saudi Arabia	3301	Saudi Arabia	3615
Germany	3287	Mexico	3234
Portugal	3019	Russia	2760
Total for Others	99475		83054
Others not Listed	23064		17862
Grand Total	156401		124734