United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Required Report: Required - Public Distribution **Date:** May 18, 2021

Report Number: CI2021-0009

Report Name: Fresh Deciduous Fruit Semi-annual

Country: Chile

Post: Santiago

Report Category: Fresh Deciduous Fruit

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Report Highlights:

Post estimates a decline in production and export of table grapes, apples, and pears due to moderate temperatures and unexpected rainfall during the summer, which ultimately decreased yields. The intense rainfall affected table grape crops the most, thus production and exports will decline by 21 percent in MY2020/21 totaling 615,000 metric tons (MT) and 475,000 MT, respectively. In MY2020/21, apple production will reach 1,095,000 MT (4.8 percent decrease) and exports 647,000 MT (2.0 percent decrease). Pear production will reach 200,000 MT (9.1 percent decline) and 106,000 (8.6 percent decline).

Commodities:
Grapes, Table, Fresh

Table 1. Production, Supply and Demand Data Statistics

Grapes, Fresh Table	2018/2019		2019/2020		2020/2021	
Market Year Begins	Oct 2018		Oct 2019		Oct 2020	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	47800	47800	47834	47834	45489	45489
Area Harvested (HA)	45900	45900	46000	46000	44000	44000
Commercial Production (MT)	830000	830000	780000	780000	780000	615000
Non-Comm. Production (MT)	4600	4600	4600	4600	4500	4700
Production (MT)	834600	834600	784600	784600	784500	619700
Imports (MT)	400	400	300	300	300	300
Total Supply (MT)	835000	835000	784900	784900	784800	620000
Fresh Dom. Consumption (MT)	180500	180500	174900	174900	164800	145000
Exports (MT)	654500	654500	610000	610000	620000	475000
Withdrawal from Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	835000	835000	784900	784900	784800	620000
(HA) ,(MT)						

Source: Post estimations.

Production:

MY2020/21 Chile's table grape planted area totaled 45,489 hectares (ha), a 4.9 percent decline over MY2019/20 (See Graph 1). Post estimates production in MY2020/21 will total 615,000 MT, a 21 percent decline over MY2019/20 (See Table 1). This drop is attributed primarily to unexpected rainfall during the summer and also to a decline in table grapes planted area. Although climatic conditions were favorable during winter and spring of MY2020/21, during the last weekend of January 2021, heavy rainfall damaged table grape crops that were ready for harvest. The heavy rainfall caused damage to the fruit, not only cracking it, but also increasing its susceptibility to fungus infections or by throwing down trees.

Table grapes are more susceptible to damage by rainfall than any other fruits such as apples, which can still endure the impact of water, although they will still require the use of fungicides. The affected orchards and farms are located in the regions of Valparaiso, Metropolitana, and O´Higgins, all of which hold large shares of the table grape production area (See Table 2). Rainfall was between 25 mm in the less affected areas and up to 70 mm in the most affected areas in the O'Higgins region. The early harvest table grapes, produced in the regions of Atacama and Coquimbo were not impacted, however producer associations reported losses of up to 80 percent in orchards located in the O'Higgins region.

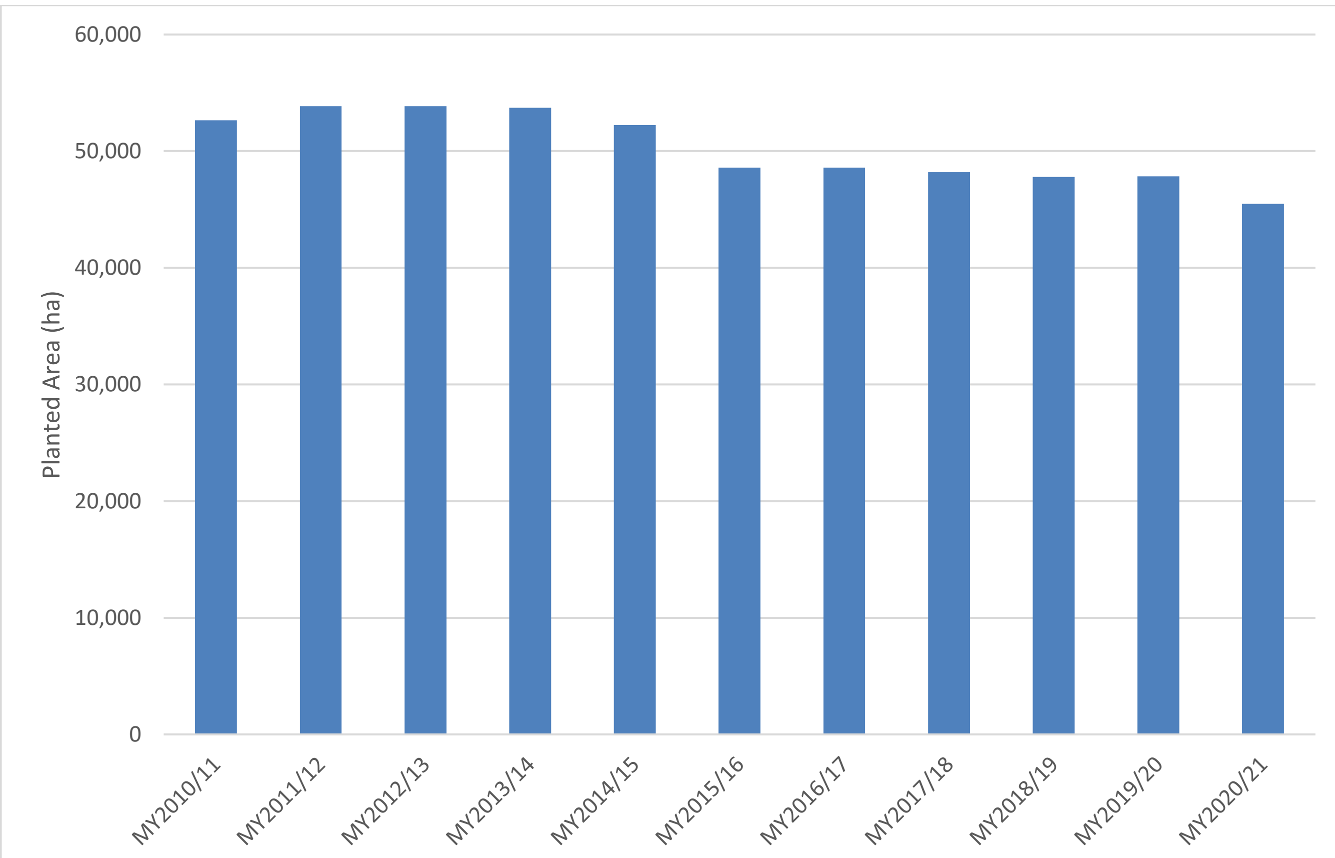
Table 2: Table Grape Planted Area by Region (hectares)

Region	Planted Area (ha) MY2020/21	Share (%)	Variation* (%)
Atacama	6,836	15%	-11.8%
Coquimbo	8,159	18%	-6.5%
Valparaíso	9,970	22%	-10.9%
Metropolitana	6,848	15%	-14.1%
O'Higgins	13,435	30%	8.7%
Maule	241	1%	16.7%
Total	**45,489**	**100%**	-4.9%

*Variation of the planted area covers a three-year period and corresponds to the last available data point from the official fruit registry.

Source: Based on data from ODEPA.

Graph 1: Table Grape Planted Area (hectares)



Source: ODEPA, 2021.

Consumption:

Post estimates that in MY2019/20 consumption will reach 145,800 MT, which represents 24 percent of the production.

Policy:

The Chilean Ministry of Agriculture through the Agricultural and Livestock Service (SAG) is implementing the 2020-2021 National Program for the Control of Grapevine Moth (*Lobesia botrana*). SAG's control actions are mandatory for all table grapes (*Vitis vinifera*) throughout the complete production area for Chilean table grapes.

Chile's request to export table grapes to the United States under a systems approach is pending USDA-APHIS review.

Trade:

For MY2020/21, Post estimates that table grape exports will total 475,000 MT, a 22 percent decrease over MY2019/20, considering the damage on table grape crops by the late January rainfall.

Table grape exports declined by 21 percent in MY2020/21 (data until February) over MY2019/20 totaling 118,089 MT and $190 million (See Table 2 and Table 3).

The United States remains the main market for Chilean table grape exports accounting for 46 percent of Chilean table grape exports. In MY2019/20, table grape exports to the United States totaled 275,495 MT, a 6.7 percent drop over MY2018/19 (See Table 2).

China is the second top market for Chilean table grapes, totaling 111,819 MT in MY2019/20 a 5.1 percent increase over MY2018/19. In MY2019/20, exports to the Netherlands and the United Kingdom grew by 17.9 percent and 8.0 percent, respectively.

Table 2: Chile, Table Grape Exports to the World (Volume)

Commodity: 080610, Grapes, Fresh						
Partner Country	Calendar Year (Volume)			Nov - Feb (Volume)		
	2019	2020	Variation (%)	11/19-02/20	11/20-02/21	Variation (%)
_World	654,516	604,561	-7.6%	149,552	118,089	-21.0%
United States	295,149	275,495	-6.7%	108,603	84,476	-22.2%
China	106,391	111,819	5.1%	5,312	4,035	-24.0%
Netherlands	29,946	35,308	17.9%	2,157	1,994	-7.6%
United Kingdom	24,641	26,606	8.0%	1,765	1,038	-41.2%
South Korea	41,129	24,491	-40.5%	8,083	7,815	-3.3%
Canada	15,659	16,398	4.7%	4,473	3,366	-24.7%
Mexico	15,839	13,709	-13.4%	4,263	2,220	-47.9%
Japan	13,548	12,308	-9.2%	7,069	5,334	-24.5%
Russia	11,318	11,002	-2.8%	653	789	20.8%
Ecuador	8,212	9,625	17.2%	1,500	1,518	1.2%
Spain	9,073	7,903	-12.9%	926	1,252	35.2%
Saudi Arabia	6,650	7,052	6.0%	222	268	20.7%
Taiwan	3,790	5,088	34.2%	283	367	29.7%
Brazil	9,170	4,943	-46.1%	458	277	-39.5%
Germany	8,680	4,871	-43.9%	578	375	-35.1%
Others	55,321	37,943	-31.4%	3,207	2,965	-7.5%

Source of Data: Trade Data Monitor, LLC.

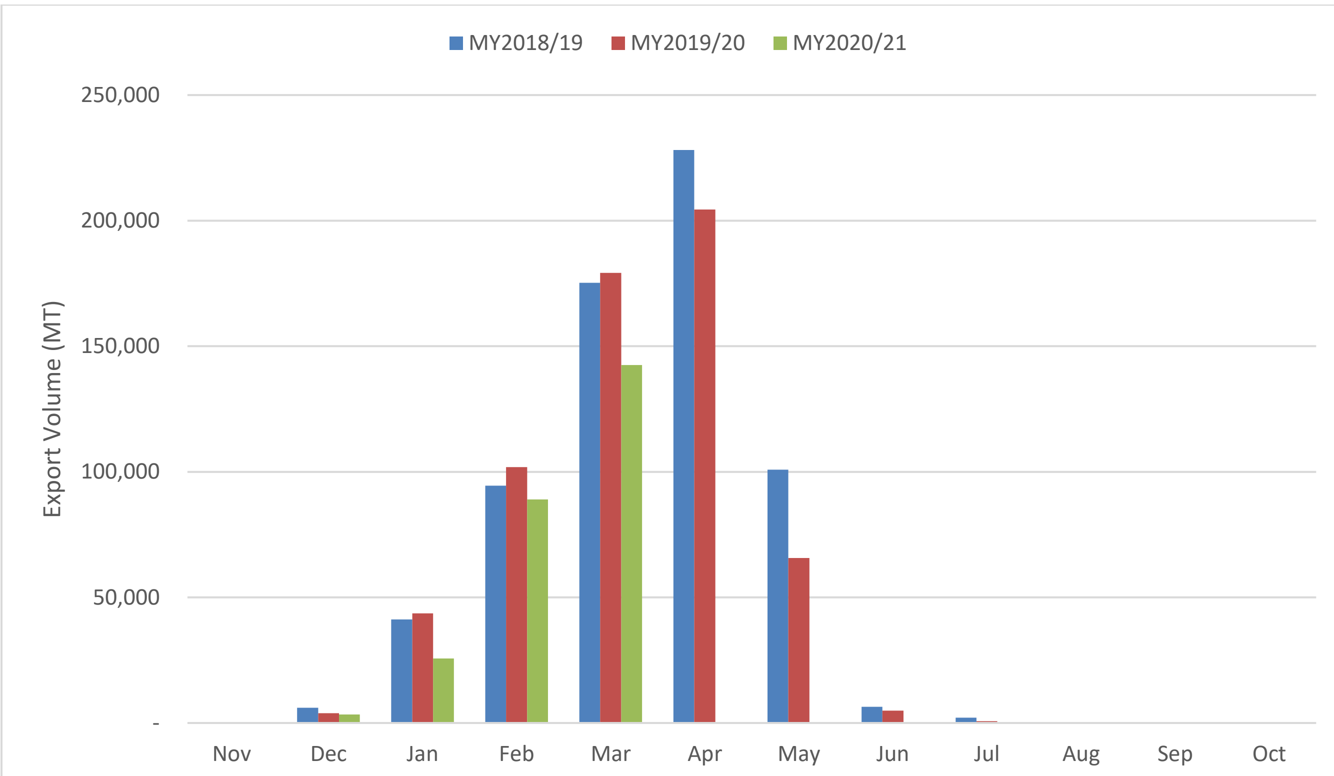
Table 3: Chile, Table Grape Exports to the World (Value)

Commodity: 080610, Grapes, Fresh						
Partner Country	Calendar year (Value USD)			Nov - Feb (Value USD)		
	2019	2020	Variation (%)	11/19-02/20	11/20-02/21	Variation (%)
_World	952,780,911	926,221,114	-2.8%	238,446,382	189,610,276	-20.5%
United States	393,976,002	382,436,706	-2.9%	157,898,415	118,263,557	-25.1%
China	154,732,212	186,676,292	20.6%	9,381,078	7,299,822	-22.2%
South Korea	84,320,451	56,577,540	-32.9%	20,837,760	20,479,161	-1.7%
Netherlands	36,191,878	45,295,153	25.2%	2,896,849	3,093,734	6.8%
United Kingdom	40,549,099	44,060,556	8.7%	3,101,876	1,924,247	-38.0%
Canada	23,179,142	24,915,288	7.5%	7,141,162	7,745,481	8.5%
Mexico	25,053,079	22,721,460	-9.3%	7,494,601	3,341,429	-55.4%
Japan	20,758,452	22,521,017	8.5%	14,863,494	12,305,314	-17.2%
Russia	16,508,118	16,744,751	1.4%	1,153,976	1,399,432	21.3%
Ecuador	12,679,786	15,163,986	19.6%	3,142,832	2,985,709	-5.0%
Spain	14,052,125	13,217,362	-5.9%	1,742,146	2,343,746	34.5%
Saudi Arabia	10,472,567	11,138,919	6.4%	379,455	498,403	31.3%
Taiwan	7,452,574	9,883,607	32.6%	849,082	969,006	14.1%
Brazil	13,495,034	6,792,631	-49.7%	717,366	489,803	-31.7%
Germany	12,607,964	6,485,113	-48.6%	577,192	360,828	-37.5%
Others	86,752,428	61,590,733	-29.0%	6,269,098	6,110,604	-2.5%

Source of Data: Trade Data Monitor, LLC.

Data from the Chilean Ministry of Agriculture's Office of Agricultural Studies and Policy (ODEPA) shows that table grape exports in March 2021 totaled 142,566 MT a 20.42 percent decrease over March 2020, thus confirming the declining trend in Chilean table grape exports (Graph 2).

Graph 2. Chile: Table Grape Export Volume by Month (MT)



Source of Data: ODEPA.

Commodities:
Apples, Fresh

Table 4. Production, Supply and Demand Data Statistics

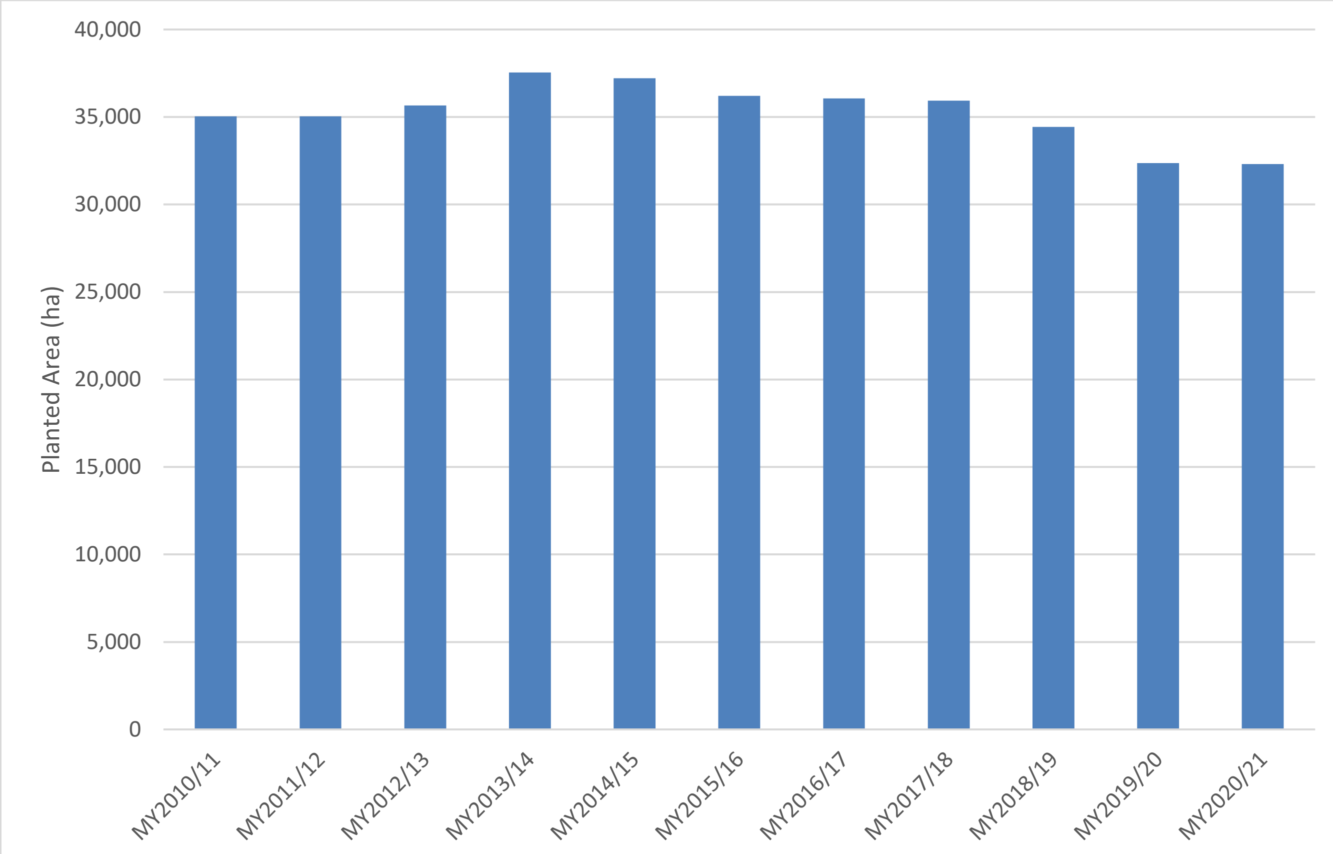
Apples, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Jan 2019		Jan 2020		Jan 2021	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	34427	34427	32371	32371	32314	32314
Area Harvested (HA)	33000	33000	31300	31300	31300	31300
Bearing Trees (1000 TREES)	36300	36300	34430	34430	34430	34430
Non-Bearing Trees (1000 TREES)	2500	2500	2400	2400	2400	2400
Total Trees (1000 TREES)	38800	38800	36830	36830	36830	36830
Commercial Production (MT)	1200000	1200000	1115000	1115000	1160000	1095000
Non-Comm. Production (MT)	10000	10000	9000	9000	10000	10000
Production (MT)	1210000	1210000	1124000	1124000	1170000	1105000
Imports (MT)	3200	3200	2000	2000	2000	2000
Total Supply (MT)	1213200	1213200	1126000	1126000	1172000	1107000
Domestic Consumption (MT)	539500	539500	476000	466000	517000	460000
Exports (MT)	673700	673700	650000	660000	655000	647000
Withdrawal from Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1213200	1213200	1126000	1126000	1172000	1107000
(HA) ,(1000 TREES) ,(MT)						

Source: Post estimations.

Production:

For MY2020/21, Post projects a 4.8 percent decrease in production totaling 1,095,000 MT (See Table 4). Chilean apple planted area totaled 32,314 ha in MY2020/21 (See Graph 3). Although winter and spring conditions were favorable for production, moderate temperatures during the summer, the intense rainfall in late January, and reduced availability of labor due to restrictions derived from the COVID-19 pandemic (quarantines, limited transport services, restrictions in mobility between regions, limited number of workers per area) reduced the potential for higher yields.

Graph 3: Apple Planted Area (hectares)



Source: ODEPA, 2021.

Consumption:

In MY2020/21, Post estimates domestic consumption of apples (fresh and processed) will total 460,000 MT or 42 percent of the total commercial apple production. Chilean consumption is destined for fresh consumption, or for further processing mainly to produce juice.

Policy:

Both the Chilean government and the production and export sector prepared protocols to operate safely. However, despite all preparations and protocols to operate safely and tackle COVID-19 related measures reported in the last Fresh Deciduous Annual GAIN report, the availability of farm workers declined, thus increasing production costs and slowing down harvest activities.

As soon as the COVID-19 pandemic hit Chile, in early March 2020, the Chilean government declared agriculture production and the agricultural food chain as essential activities. For this reason, the agriculture sector remains operating albeit under strict sanitary protocols. Agricultural workers (including those working in farms and fruit packing facilities) have special permits to move from work to their jobs even if they reside in areas under strict quarantine measures. The Chilean Ministry of Agriculture and various agricultural producers and exporters associations implemented a series of recommendations and protocols to prevent and contain the spread of the COVID-19 virus in agricultural production facilities and various links of the distribution chain. For additional details click here.

Trade:

Following the decrease in apple production, for MY2020/21, Post estimates a two percent drop in Chilean apple exports over MY2019/20, totaling 647,000 MT.

According to MY2019/20 data, Chilean top markets for apple exports are the United States, Colombia, and Ecuador.

Fresh Chilean apple exports to the United States dropped by 33.8 percent in MY2019/20 due to the increased available supplies in the U.S. market (See Table 5).

January and February 2021 data shows Chilean apple exports declined by 25 percent in volume and 20.6 percent in value over the same period in 2020, totaling 10,404 MT and $9.5 million (See Table 5 and Table 6). Post estimates that the MY2020/21 apple harvest and export process is advancing at a lower rate than in MY2019/20 due to the decrease of farm workers and logistical challenges related to the COVID-19 pandemic. However, the data for the first two months is not enough to identify a decreasing trend.

Table 5: Chile, Apple Exports to the World (Volume)

Commodity: 080810, Apples, Fresh						
Partner Country	**Marketing Year (Volume)**			**January-February (Volume)**		
	MY2018/19	**MY2019/20**	**Variation (%)**	**2020**	**2021**	**Variation (%)**
_World	673,729	659,875	-2.1%	13,863	10,404	-25.0%
Colombia	74,332	74,158	-0.2%	6,836	5,161	-24.5%
United States	78,662	52,841	-32.8%	36	-	-100.0%
Ecuador	48,179	52,705	9.4%	3,000	2,401	-20.0%
Saudi Arabia	38,073	51,875	36.3%	-	-	
Brazil	19,913	47,885	140.5%	103	77	-25.2%
Peru	40,604	41,860	3.1%	1,699	1,177	-30.7%
Netherlands	35,709	41,452	16.1%	272	-	-100.0%
Taiwan	42,015	38,964	-7.3%	-	-	
United Kingdom	27,199	29,810	9.6%	-	-	
Russia	17,979	26,121	45.3%	20	-	-100.0%
Germany	18,880	21,505	13.9%	43	-	-100.0%
Bolivia	19,569	20,869	6.6%	1,279	1,197	-6.4%
India	42,478	20,643	-51.4%	-	-	
China	39,637	15,524	-60.8%	106	-	-100.0%
France	15,172	15,503	2.2%	-	-	
Others	115,328	108,160	-6.2%	469	391	-16.6%

Source of Data: Trade Data Monitor, LLC.

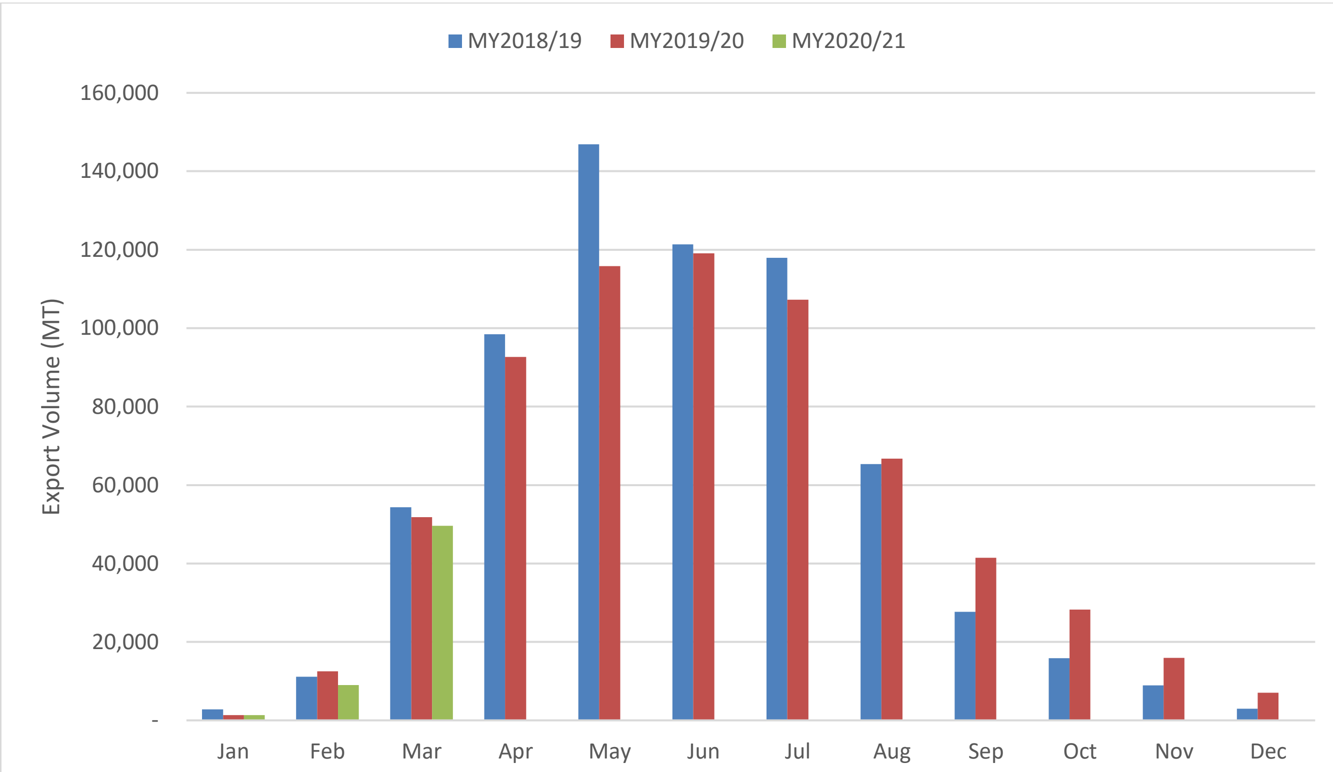
Table 6: Chile Apple Exports to the World (Value)

Commodity: 080810, Apples, Fresh						
Partner Country	Marketing Year (Value USD)			January-February (Value USD)		
	MY2018/19	MY2019/20	Variation (%)	2020	2021	Variation (%)
_World	602,882,263	568,584,995	-5.7%	11,913,114	9,457,250	-20.6%
Colombia	66,532,109	64,724,614	-2.7%	6,813,713	5,340,701	-21.6%
United States	85,885,526	59,247,479	-31.0%	26,358	-	-100.0%
Saudi Arabia	33,351,430	46,261,905	38.7%	-	-	
Ecuador	36,487,293	38,500,026	5.5%	2,436,714	2,243,396	-7.9%
Taiwan	43,234,419	37,934,380	-12.3%	-	-	
Netherlands	30,753,260	37,219,073	21.0%	166,175	-	-100.0%
Brazil	17,238,145	36,586,530	112.2%	75,624	52,155	-31.0%
Peru	28,577,117	29,471,879	3.1%	1,237,989	912,030	-26.3%
United Kingdom	27,132,238	28,343,967	4.5%	-	-	
Russia	15,158,423	20,373,989	34.4%	17,469	-	-100.0%
Germany	17,186,961	18,648,339	8.5%	38,488	-	-100.0%
India	31,884,990	15,652,391	-50.9%	-	-	
China	37,239,513	15,380,265	-58.7%	67,200	-	-100.0%
France	15,019,446	14,761,744	-1.7%	-	-	
Canada	19,765,688	9,328,960	-52.8%	-	-	
Others	97,435,705	96,149,454	-1.3%	1,033,384	908,968	-12.0%

Source of Data: Trade Data Monitor, LLC.

Data from ODEPA shows a slight recovery for apple exports in March 2021, totaling 49,622 MT, a 4.23 percent decrease over March 2020 (Graph 4). The bulk of Chilean apple exports takes place between April and July.

Graph 4. Chile: Apple Export Volume by Month (MT)



Source of Data: ODEPA

Commodities:
Pears, Fresh

Table 7. Production, Supply and Demand Data Statistics:

Pears, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Jan 2019		Jan 2020		Jan 2021	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	8157	8157	7272	7272	6950	6950
Area Harvested (HA)	8100	8100	7250	7250	6700	6700
Bearing Trees (1000 TREES)	8505	8505	7500	7500	7000	7000
Non-Bearing Trees (1000 TREES)	1050	1050	900	900	1000	1000
Total Trees (1000 TREES)	9555	9555	8400	8400	8000	8000
Commercial Production (MT)	250000	250000	220000	220000	211000	200000
Non-Comm. Production (MT)	2000	2000	2000	2000	2000	2000
Production (MT)	252000	252000	222000	222000	213000	202000
Imports (MT)	400	400	500	500	500	500
Total Supply (MT)	252400	252400	222500	222500	213500	202500
Domestic Consumption (MT)	120900	120900	106500	106500	103500	96500
Exports (MT)	131500	131500	116000	116000	110000	106000
Withdrawal from Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	252400	252400	222500	222500	213500	202500
(HA) ,(1000 TREES) ,(MT)						

Source: Post estimations.

Production:

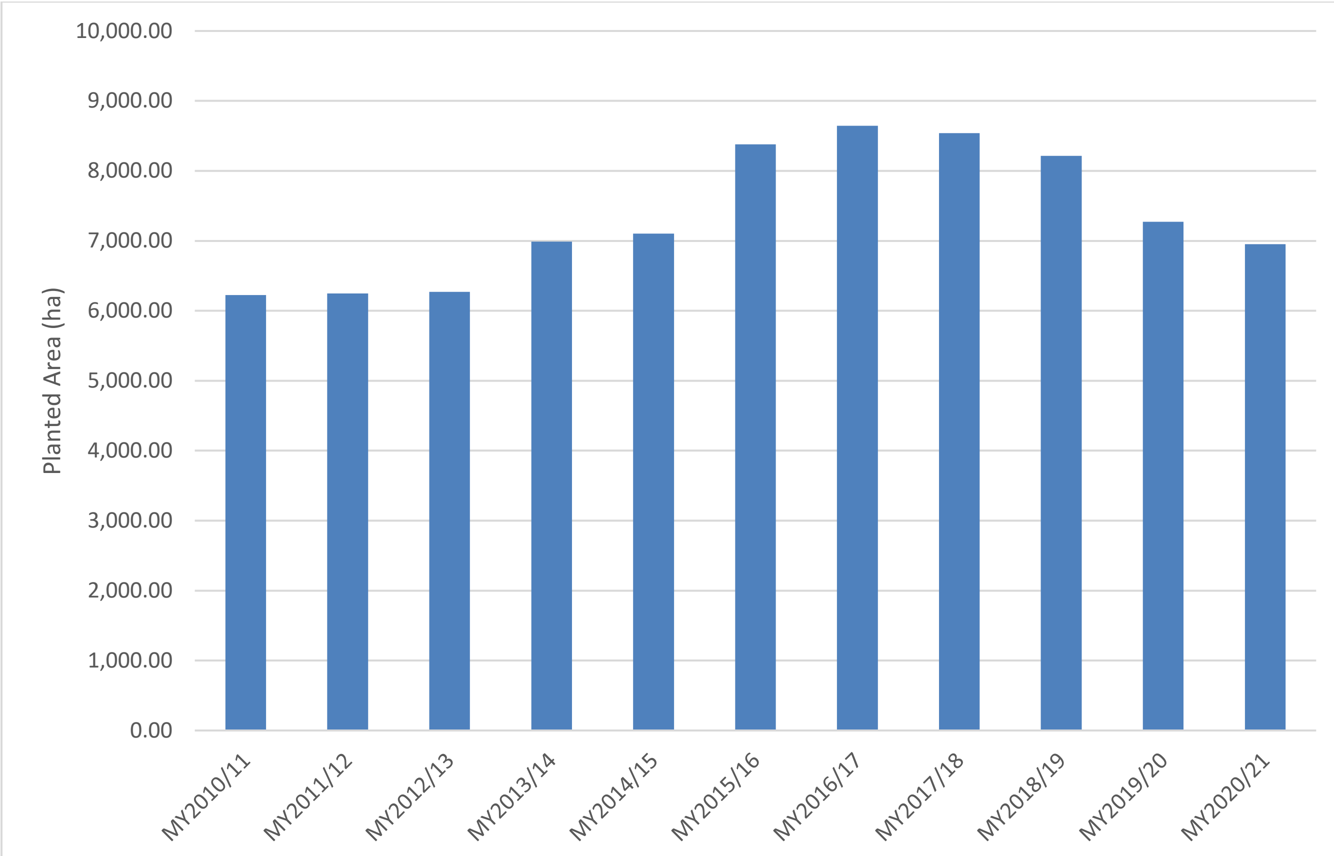
Post estimates Chile's MY2020/21 fresh pear production to decrease by 9.1 percent and total 200,000 MT (See Table 7). This reduction is due to the lower planted area in MY2020/21 (See Graph 5) and a fall in yields due to cooler temperatures in the summer. Additionally, the MY2020/21 pear harvest slowed down due to the reduced availability of workers, which decreased productivity and increased production costs for farmers.

Consumption:

In MY2019/20, Post estimates domestic consumption of pears at 96,500 MT (includes fresh domestic consumption and for further processing).

Post estimates that in MY2020/21, Chile's domestic consumption will make up 51 percent of the total supply.

Graph 5: Pear Planted Area (hectares)



Source: ODEPA, 2021.

Policy

There are no new policy developments to report at this time.

Trade:

In MY2020/21, Post estimates pear exports to decrease by 8.6 percent and total 106,000 MT due to the decline in pear planted area and lower production volume.

In MY2019/20 Chile's top market for fresh pear exports were Colombia, Italy, and the Netherlands. In MY2020/21, Chilean pear exports to Spain and Italy increased by 23.9 percent, totaling 2,812 MT, and by 12.9 percent, totaling 2,779 MT, respectively. Pear exports to the other top markets decreased in the first two months of MY2020/21 (See Table 8).

In MY2020/21 (data until February), Chile's pear exports dropped by 21.1 percent in volume over MY2019/20, totaling 12,561 MT and $13 million (See Table 8 and Table 9).

Table 8: Chile, Pear Exports to the World (Volume)

Commodity: 080830, Pears, Fresh						
Partner Country	Marketing Year (Volume)			January-February (Volume)		
	MY2018/19	MY2019/20	Variation (%)	2020	2021	Variation (%)
_World	131,531	113,954	-13.4%	15,918	12,561	-21.1%
Colombia	21,345	18,676	-12.5%	2,983	2,304	-22.8%
Italy	12,513	14,394	15.0%	2,462	2,779	12.9%
Netherlands	13,080	12,716	-2.8%	998	194	-80.6%
Russia	20,032	11,672	-41.7%	329	203	-38.3%
Ecuador	11,632	9,446	-18.8%	1,433	1,097	-23.4%
United States	9,921	9,206	-7.2%	2,267	872	-61.5%
Peru	11,620	8,742	-24.8%	936	434	-53.6%
Spain	5,564	5,279	-5.1%	2,269	2,812	23.9%
Germany	4,224	5,060	19.8%	17	63	270.6%
China	1,794	2,541	41.6%	94	40	-57.4%
Saudi Arabia	2,379	2,297	-3.4%	767	538	-29.9%
Brazil	3,210	1,620	-49.5%	145	75	-48.3%
Panama	1,992	1,350	-32.2%	114	69	-39.5%
Mexico	1,558	1,279	-17.9%	23	23	0.0%
El Salvador	918	1,198	30.5%	47	31	-34.0%
Others	9,749	8,478	-13.0%	1,034	1,027	-0.7%

Source of Data: Trade Data Monitor, LLC.

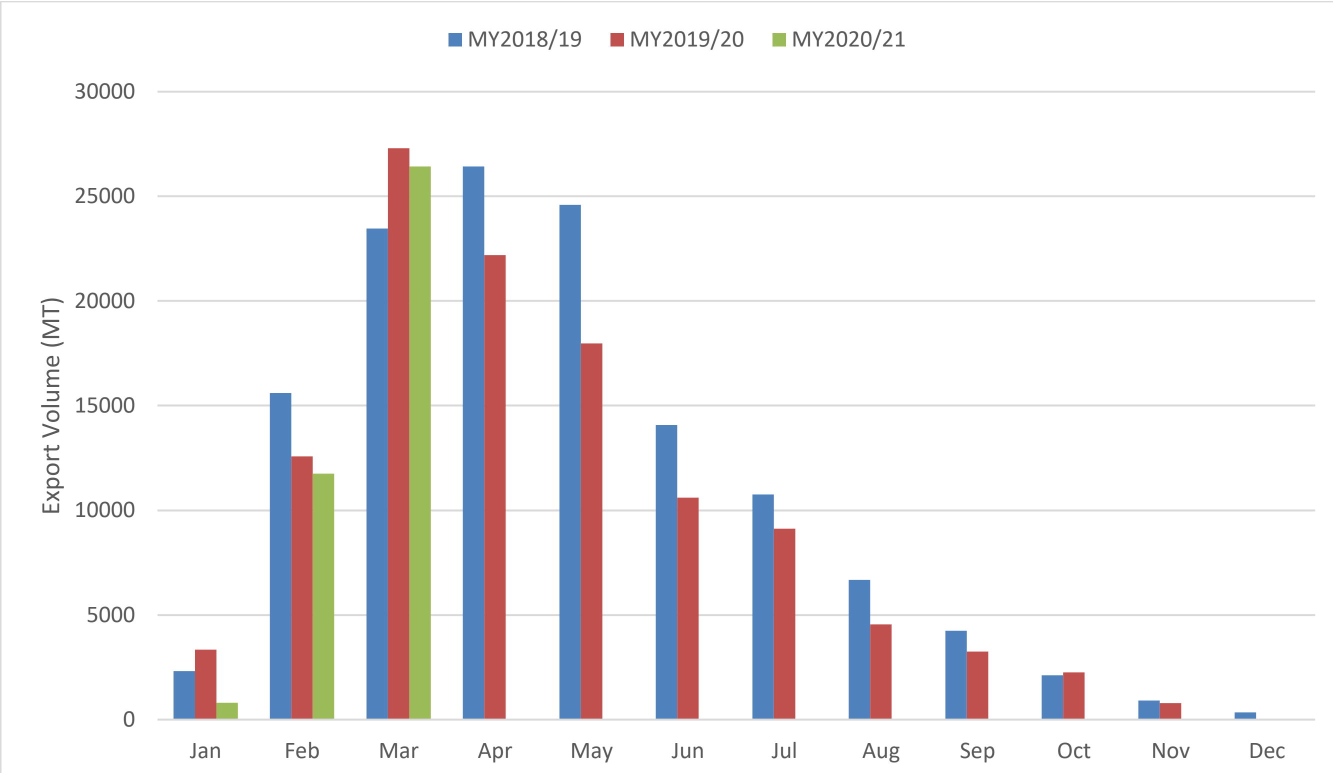
Table 9: Chile, Pear Exports to the World (Value)

Commodity: 080830, Pears, Fresh						
Partner Country	Marketing Year (Value USD)			January-February (Value USD)		
	MY2018/19	MY2019/20	Variation (%)	2020	2021	Variation (%)
_World	124,253,189	109,426,528	-11.9%	16,038,713	12,952,711	-19.2%
Colombia	20,610,441	17,768,052	-13.8%	2,986,820	2,292,321	-23.3%
Italy	12,111,345	13,776,978	13.8%	2,633,027	3,063,788	16.4%
Netherlands	13,009,079	13,460,683	3.5%	1,081,601	162,735	-85.0%
Russia	20,144,880	12,297,762	-39.0%	367,852	209,104	-43.2%
Ecuador	9,983,909	8,192,098	-17.9%	1,321,211	1,071,215	-18.9%
United States	8,684,483	7,729,322	-11.0%	2,125,253	886,215	-58.3%
Peru	7,998,836	6,364,392	-20.4%	657,971	343,707	-47.8%
Spain	6,049,774	5,703,585	-5.7%	2,201,339	2,895,657	31.5%
Germany	3,666,130	4,934,175	34.6%	23,302	38,546	65.4%
China	2,123,065	2,836,696	33.6%	114,028	43,952	-61.5%
Saudi Arabia	2,862,291	2,662,032	-7.0%	889,565	604,827	-32.0%
Brazil	3,220,830	1,645,348	-48.9%	147,746	99,822	-32.4%
Panama	1,999,029	1,309,400	-34.5%	131,455	72,726	-44.7%
El Salvador	986,332	1,186,655	20.3%	51,622	30,282	-41.3%
Mexico	1,292,637	1,091,814	-15.5%	23,981	8,960	-62.6%
Others	9,510,128	8,467,536	-11.0%	1,281,940	1,128,854	-11.9%

Source of Data: Trade Data Monitor, LLC.

Data from ODEPA shows Chilean pear exports totaled 26,434 MT in March 2021, a 3.14 percent decrease over March 2020 (Graph 6).

Graph 6. Chile: Pear Export Volume by Month (MT)



Source of Data: ODEPA

Attachments:

No Attachments