

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:

For MY2021/22, Post projects 59,000 MT of raisin production and 56,200 MT of exports. This will represent a one percent decrease in Chilean raisin production and exports. The decrease can be attributed to a reduction in table grape planted area as farmers switched to more profitable crops such as cherries, walnuts, avocado, and citrus. Raisin production in Chile relies almost exclusively on table grape production. In MY2020/21 table grape planted area declined by 4.9 percent to 45,489 hectares and it is projected to decrease to 45,000 ha in MY2021/22.

Table 1: Production, Supply and Distribution Statistics:

Raisins Market Begin Year	2019/2020		2020/2021		2021/2022	
	Jan 2020		Jan 2021		Jan 2022	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	47,834	0	45,500	0	45,000
Area Harvested	0	45,700	0	43,500	0	43,000
Beginning Stocks	0	0	0	400	0	400
Production	0	61,138	0	59,451	0	59,000
Imports	0	329	0	749	0	800
Total Supply	0	61,467	0	60,600	0	60,200
Exports	0	57,567	0	56,650	0	56,200
Domestic Consumption	0	3,500	0	3,550	0	3600
Ending Stocks	0	400	0	400	0	400
Total Distribution	0	61,467	0	60,600	0	60,200
(HA) ,(MT)						

Source of data: Post estimates

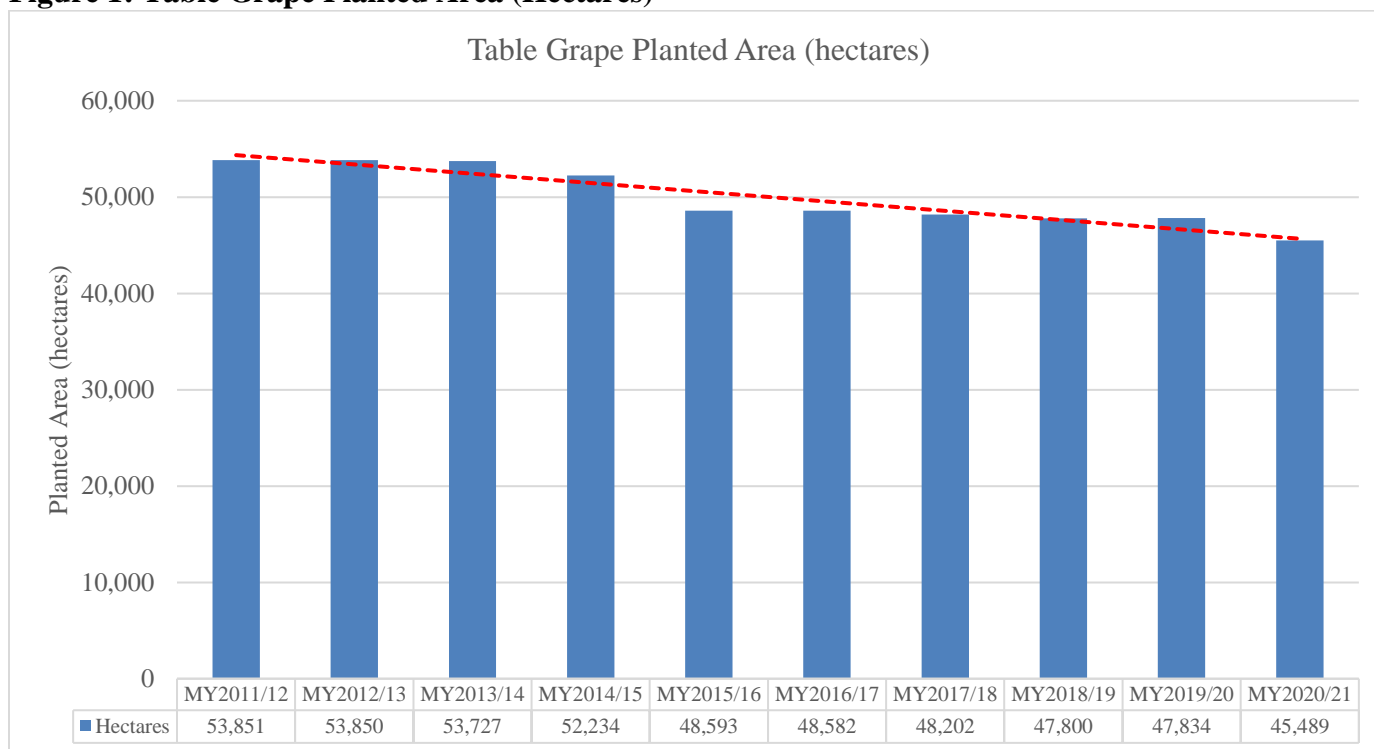
Crop Area:

Raisin production in Chile relies almost exclusively on table grape production, thus understanding table grape planted area is crucial to understanding raisin production trends. There are no official data in Chile on the few grapes orchards that are exclusively focused on raisin production.

Chile's fresh table grape planted area in MY2020/21 totaled 45,489 hectares (Ha) a 4.9 percent reduction over MY2019/20 (See Figure 1). In MY2021/22 Post estimates that planted area will decrease to 45,000 ha, continuing the slight downward trend that has appeared over the past decade.

Table grape planted area shows a decreasing trend from 53,851 ha in MY2011/12 to 45,489 in MY2020/2021. Recent data show lower planted area in the central regions of Valparaiso and Metropolitana, which explains the 4.9 percent decrease in planted area from 47,824 ha in MY2019/20 to 45,489 ha in MY2020/21. Producers of table grapes in these regions have replaced their crops with fruit that is currently more profitable such as walnuts, avocado, and citrus in the Valparaiso region. Similarly, farmers are switching to cherries, walnuts, and citrus in the Metropolitana region.

Figure 1: Table Grape Planted Area (Hectares)



Source: ODEPA, 2021

Production:

In MY2021/22 raisin production is projected to reach 59,000 MT a one percent decrease over MY2020/21. These estimates assume normal table grape yields and a sustained decrease in planted area to 45,000 ha (see Table 1).

Chilean producers expected MY2020/21 grape production to increase in volume over MY2019/20 due to the favorable climatic conditions during the winter and spring. However, heavy rainfall during January, in the middle of the table grape harvest, damaged many crops, reducing the fresh table grapes produced. Grape volumes fell to 620,000 MT and raisin production to 59,451 MT (see Table 2).

Chilean grape producers seek to export most of their production as “fresh table grapes” to gain the highest profit. The remaining grapes are normally used for raisins, juice, or wine production. In MY2020/21, the decrease in raisin production was not as severe as the decrease in fresh table grape production. Heavy rainfall was especially detrimental to the fresh table grape exporting process since some grapes were damaged by the rain. The damaged made the grapes more susceptibility to fungal infections and less apt to survive the long distances to export markets. Rainfall was less damaging to

raisin production since grapes are dried and processed. As a result, a higher share of the overall grape production may be destined to raisin production, offsetting the decrease in grape production volume.

Table 2: Chilean Grape Production.

Production sector	MY2019/20 (MT)	Share (%)	MY2020/21 (MT)	Share (%)	MY2021/22 (MT)	Share (%)
Fresh Table Grapes	784,900	61	620,000	57	760,000	61
Raisin production (fresh basis)	270,211	21	261,053	24	261,639	21
<i>Raisins (dried basis)</i>	<i>61,138</i>		<i>59,451</i>		<i>59,000</i>	
Juice production	167,274	13	141,404	13	161,967	13
Wine production	64,336	5	65,263	6	62,295	5
Total Production	1,286,721	100	1,087,719	100	1,245,902	100

Source: Post Estimates

Consumption:

In MY2021/22, raisin consumption is estimated to increase by 1.5 percent to 3,600 MT following population growth. Chilean raisin exports represent around 95 percent of the Chilean raisin production, and the remaining five percent is consumed as snacks in Chile or is used by confectionary industry. Demand for healthy snacks, and for confectionary products from households remained steady in MY2020/21.

Stocks:

Stocks are projected to remain flat at 400 MT in MY2021/22. There are no logistical barriers to trade and exports are flowing regularly out of Chilean ports. Chilean companies do not store raisins for large periods of time, since trade flow is constant throughout the year. Stocks correspond to raisins that were not sold between marketing years.

Trade:

Post estimates that in MY2021/22, Chilean raisin exports will decrease to 56,200 MT due to the lower production volume (see Table 1). This is a decrease of one percent over MY2020/21 exports of 56,650 metric tons.

From January to May 2021, Chilean raisin exports to the world decreased by 1.1 percent in volume over the same period in 2020 reaching 18,668 MT (see Table 3) and \$37.5 million (see Table 4).

Monthly exports of raisins show a slight decrease over MY2019/20 (Figure 2). Chilean raisin exports take place throughout the marketing year, and export volume usually peaks between July and September.

In MY2020/21 (data until May) the top markets for Chilean raisin exports were the Netherlands, the United States and Mexico. These markets have historically imported raisins from Chile and differences year-to-year are attributed to specific market conditions such as price variations.

China significantly increased demand for Chilean raisins in MY2020/21. Chilean exports of raisins to China increased by 115 percent in MY2020/21 over MY2019/20 totaling 1,237 MT and making it the 5th top export market for Chilean raisins. Chilean raisin exporters expect Chinese demand for Chilean raisins to remain strong, thus China could become one of the top markets for Chilean raisins in MY2021/22.

Table 3: Chilean Raisin Export Statistics, Quantity

Chile Exports to the World						
Commodity: 080620, Grapes, Dried (Including Raisins)						
Quantity (MT)						
Partner Country	Marketing Year (MY)			January-May		
	MY2018/19	MY2019/20	Variation (%)	Jan - May 2020	Jan - May 2021	Variation (%)
_World	66,379	57,567	-13.3%	18,877	18,668	-1.1%
Mexico	6,231	5,913	-5.1%	2,370	1,484	-37.4%
United States	5,978	4,892	-18.2%	1,569	1,662	5.9%
Peru	4,846	4,496	-7.2%	437	658	50.6%
United Kingdom	4,729	3,778	-20.1%	1,564	1,443	-7.7%
Netherlands	4,113	3,770	-8.3%	1,661	1,890	13.8%
Russia	4,115	2,796	-32.1%	1,123	1,168	4.0%
China	4,538	2,653	-41.5%	575	1,237	115.1%
Colombia	4,633	2,624	-43.4%	957	784	-18.1%
Ecuador	2,706	2,512	-7.2%	510	737	44.5%
Poland	1,463	2,473	69.0%	628	490	-22.0%
Spain	2,010	1,695	-15.7%	792	711	-10.2%
Denmark	1,775	1,640	-7.6%	607	589	-3.0%
Taiwan	1,617	1,631	0.9%	703	587	-16.5%
Venezuela	681	1,538	125.8%	62	70	12.9%
Iraq	754	1,348	78.8%	517	391	-24.4%
Turkey	1,428	1,299	-9.0%	413	189	-54.2%
France	1,185	1,151	-2.9%	527	384	-27.1%
Lithuania	1,123	1,037	-7.7%	256	424	65.6%
Thailand	714	831	16.4%	469	377	-19.6%
Japan	1,266	690	-45.5%	243	230	-5.3%
Others	10,474	8,800	-16.0%	2,894	3,163	9.3%

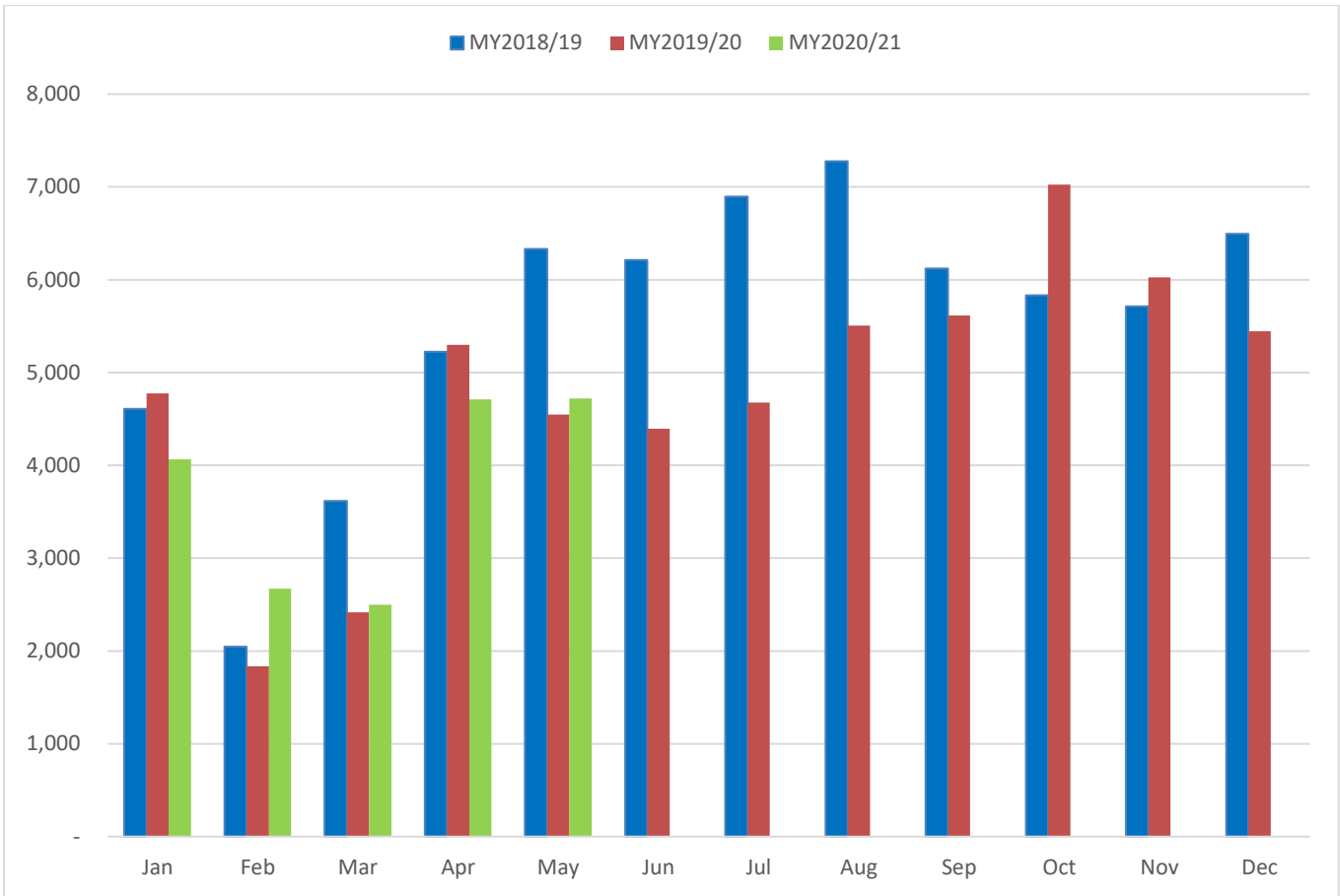
Source of Data: Trade Data Monitor, LLC

Table 4: Chilean Raisin Export Statistics, Value

Chile Exports to the World						
Commodity: 080620, Grapes, Dried (Including Raisins)						
Value (\$ USD)						
Partner Country	Marketing Year (MY)			January-May		
	MY2018/19	MY2019/20	Variation (%)	Jan - May 2020	Jan - May 2021	Variation (%)
_World	155,046,399	124,527,254	-19.7%	43,027,351	37,482,391	-12.9%
Mexico	12,784,034	9,947,233	-22.2%	4,328,717	2,262,167	-47.7%
United States	13,620,871	9,809,716	-28.0%	3,330,213	2,992,129	-10.2%
Peru	11,616,840	9,798,273	-15.7%	1,029,573	1,365,309	32.6%
Netherlands	10,284,020	9,356,106	-9.0%	4,131,045	4,262,717	3.2%
United Kingdom	11,192,128	8,350,935	-25.4%	3,565,361	2,984,393	-16.3%
Russia	10,278,493	7,530,317	-26.7%	3,035,948	2,510,859	-17.3%
China	10,791,778	5,469,864	-49.3%	1,257,676	2,467,717	96.2%
Poland	3,298,503	5,202,448	57.7%	1,334,608	1,021,060	-23.5%
Colombia	8,865,408	4,432,325	-50.0%	1,790,366	1,166,684	-34.8%
Spain	4,834,542	3,859,446	-20.2%	1,796,025	1,514,997	-15.6%
Ecuador	4,569,436	3,823,320	-16.3%	846,336	1,010,258	19.4%
Taiwan	3,754,162	3,594,649	-4.2%	1,529,415	1,269,912	-17.0%
Denmark	4,041,870	3,514,965	-13.0%	1,345,844	1,201,937	-10.7%
Iraq	1,885,875	3,315,982	75.8%	1,286,651	872,118	-32.2%
France	3,328,824	3,246,711	-2.5%	1,495,430	1,039,671	-30.5%
Turkey	3,439,250	2,989,992	-13.1%	976,235	411,530	-57.8%
Lithuania	2,656,362	2,642,718	-0.5%	670,946	872,287	30.0%
Venezuela	1,412,132	2,579,306	82.7%	92,106	98,288	6.7%
Italy	2,356,807	2,063,954	-12.4%	951,994	772,600	-18.8%
Thailand	1,765,117	1,818,180	3.0%	1,048,092	671,492	-35.9%
Others	28,269,947	21,180,814	-25.1%	7,184,770	6,714,266	-6.5%

Source of Data: Trade Data Monitor, LLC

Figure 2: Chilean Raisin Monthly Export Volume (MT)



Source of Data: Trade Data Monitor, LLC

Attachments:

No Attachments