

Voluntary Report – Voluntary - Public Distribution

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Report Name: Raisin Production and Exports

Country: Chile

Post: Santiago

Report Category: Raisins

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Report Highlights:

In marketing year (MY) 2025/26, Chilean raisin production is forecast to slightly decrease to 62,000 metric tons (MT), down from 62,162 MT in MY 2024/25. This decline is attributed to the continued reduction in table grape area planted due to competition from other suppliers like Peru, low profitability of traditional grape varieties, and drought conditions. Additionally, the shift in agricultural land use toward more lucrative crops like walnuts, cherries, and citrus further impacts raisin production. Despite these challenges, raisin production remains a viable alternative for table grape producers, particularly those growing traditional varieties like Crimson and Thompson Seedless, although profits are lower compared to fresh table grape exports.

Production:

In MY 2025/26, raisin production is forecast to decrease to 62,000 MT, a marginal drop from 62,162 MT in MY 2024/25 (Table 1). This decline is primarily attributed to the continued reduction in table grape area planted. The area planted with table grapes is expected to decrease by 3.6 percent to 32,000 hectares. Raisin production in Chile derives almost exclusively from orchards that are focused on fresh table grape exports. Producers sell grapes for raisin production that do not comply with the quality requirements for table grape exports.

Table 1. Production, Supply and Distribution

| Raisins Market Year Begins | 2023/2024 | | 2024/2025 | | 2025/2026 | |
|---|------------------|----------|------------------|----------|------------------|----------|
| | Jan 2023 | | Jan 2024 | | Jan 2025 | |
| Chile | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA) | 0 | 39931 | 0 | 33155 | 0 | 32000 |
| Area Harvested (HA) | 0 | 39000 | 0 | 32000 | 0 | 31000 |
| Beginning Stocks (MT) | 0 | 207 | 0 | 200 | 0 | 200 |
| Production (MT) | 0 | 74434 | 0 | 62162 | 0 | 62000 |
| Imports (MT) | 0 | 187 | 0 | 200 | 0 | 200 |
| Total Supply (MT) | 0 | 74227 | 0 | 62562 | 0 | 62400 |
| Exports (MT) | 0 | 70984 | 0 | 59062 | 0 | 58850 |
| Domestic Consumption (MT) | 0 | 3250 | 0 | 3300 | 0 | 3350 |
| Ending Stocks (MT) | 0 | 200 | 0 | 200 | 0 | 200 |
| Total Distribution (MT) | 0 | 74434 | 0 | 62562 | 0 | 62400 |
| (HA) ,(MT) | | | | | | |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

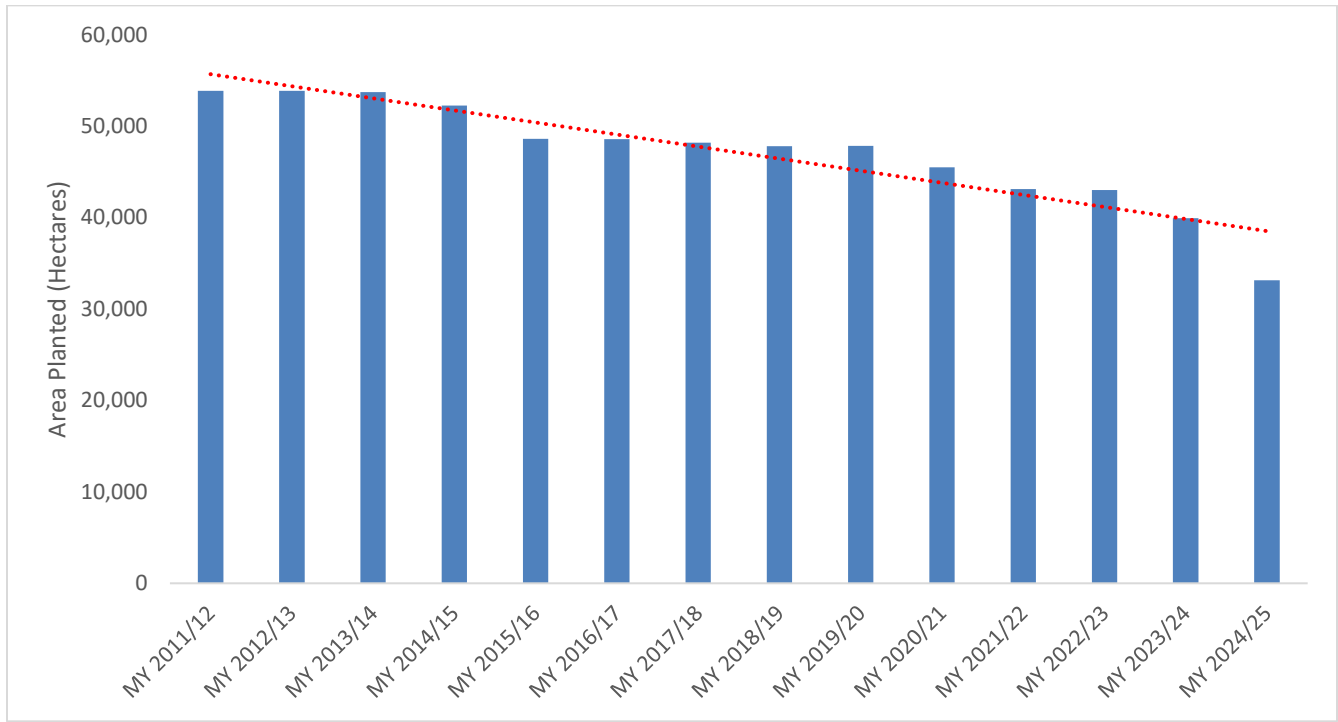
Source: Post estimates

The decreasing trend in area planted reflects the ongoing challenges faced by the table grape industry in Chile, including competition from other suppliers like Peru, low margins for traditional grape varieties such as Crimson Seedless and Thompson Seedless, and the impact of drought conditions. Additionally, the shift in agricultural land use in central Chile toward more profitable crops like walnuts, cherries, and citrus further contributes to the reduction in table grape production, which directly affects raisin production.

Despite these challenges, raisin production remains a reliable alternative for table grape producers, especially those with orchards of traditional grape varieties which are not in high demand. However, profits from raisin production are much lower than those obtained with fresh table grape exports.

In MY 2024/25, Post estimates raisin production at 62,162 MT, reflecting a significant decrease of 16.1 percent compared to MY 2023/24, when production totaled 74,040 MT. This decline is attributed to a reduction in the share of table grape production used for raisin production, which constituted 23.5 percent of table grape production in MY 2024/25. Raisin production share typically declines in years when the fruit is high quality and in good condition and when there is high demand for fresh table grapes in export markets.

Figure 1: Table Grape Planted Area (Hectares)



Source: ODEPA, 2025

Table 2: Chilean Table Grape Production

| Production sector | MY 2023/24 (MT) | Share (%) | MY 2024/25 (MT) | Share (%) | MY 2025/26 (MT) | Share (%) |
|---------------------------------|-----------------|-----------|-----------------|-----------|-----------------|-----------|
| Fresh Table Grapes | 651,500 | 55.0% | 645,000 | 58.1% | 650,000 | 58.3% |
| Raisin production (fresh basis) | 310,968 | 26.2% | 261,080 | 23.5% | 260,400 | 23.3% |
| Raisins (dried basis) | 74,040 | | 62,162 | | 62,000 | |
| Juice production | 161,000 | 13.6% | 150,000 | 13.5% | 150,000 | 13.4% |
| Wine production | 62,000 | 5.2% | 55,000 | 5.0% | 55,000 | 4.9% |
| Total Production | 1,185,468 | 100.0% | 1,111,080 | 100.0% | 1,115,400 | 100.0% |

Source: Post estimates

Consumption:

Domestic raisin consumption is projected to grow modestly by 1.5 percent in MY 2025/26, reaching 3,350 MT. This increase is consistent with Chile's population growth, which drives higher demand for raisins as snacks and ingredients in confectionery products such as ice cream, cookies, chocolate, and baked goods.

Stocks:

Post forecasts ending stocks to remain flat at 200 MT, indicating that Chilean companies continue to avoid long-term storage of raisins, relying instead on consistent trade flows throughout the year. This approach minimizes storage costs and ensures a steady supply to both domestic and international markets.

Trade:

Post forecasts that raisin exports will decrease slightly to 58,850 MT in MY 2025/26, down from 59,062 MT in MY 2024/25. This reduction aligns with the anticipated decline in production and a steady share of table grape production allocated for raisin processing. Chilean raisin exports have historically been influenced by the quality and yield of table grape harvests, and the ongoing reduction in planted and harvested areas further limits export potential. Imports are expected to remain steady at 200 MT, reflecting Chile's ability to meet domestic demand primarily through local production.

Chilean raisin exports decreased by 16.8 percent in MY 2024/25, totaling 59,062 MT compared to 70,984 MT in MY 2023/24. This decline is consistent with the reduction in raisin production.

From January to May 2025 (Figure 2), exports dropped by 11.18 percent compared to the same period in 2024, reaching 17,144 MT (Table 3). Chilean exports to the United States, historically a key market destination, sharply declined by -60.02 percent in volume and 51.84 percent in value during this period, while Chilean exports to other markets such as Peru and Poland grew significantly.

Chilean raisin exports are available throughout the year, and export volume peaks between August and November, just before the Chilean table grape harvest season starts.

Table 3: Chilean Export Statistics, Volume (MT)

| Commodity: 080620, Grapes, Dried (Including Raisins) | | | | | | |
|---|-----------------------|-------------------|----------------------|--------------------|-------------|----------------------|
| Partner Country | Marketing Year | | | January-May | | |
| | MY 2023/24 | MY 2024/25 | Variation (%) | 2024 | 2025 | Variation (%) |
| The World | 70,984 | 59,062 | -16.80% | 19,302 | 17,144 | -11.18% |
| United States | 6,167 | 5,045 | -18.19% | 2,211 | 884 | -60.02% |
| Peru | 4,579 | 4,266 | -6.84% | 914 | 1,075 | 17.61% |
| Netherlands | 4,763 | 4,170 | -12.45% | 1,738 | 1570 | -9.67% |
| China | 4,493 | 3,644 | -18.90% | 1280 | 1260 | -1.56% |
| Poland | 3,158 | 3,258 | 3.17% | 765 | 1,457 | 90.46% |
| United Kingdom | 3,593 | 3,155 | -12.19% | 1,094 | 1071 | -2.10% |
| Venezuela | 2,739 | 2,497 | -8.84% | 167 | 118 | -29.34% |
| Colombia | 4,760 | 2,192 | -53.95% | 986 | 682 | -30.83% |
| Spain | 1,862 | 2,013 | 8.11% | 792 | 557 | -29.67% |
| Russia | 1,871 | 1,849 | -1.18% | 681 | 432 | -36.56% |
| Denmark | 1,462 | 1,731 | 18.40% | 678 | 465 | -31.42% |
| France | 961 | 1,662 | 72.94% | 368 | 480 | 30.43% |
| Lithuania | 1,506 | 1,576 | 4.65% | 490 | 577 | 17.76% |
| Taiwan | 1,621 | 1,521 | -6.17% | 690 | 418 | -39.42% |
| Iraq | 1,351 | 1,514 | 12.07% | 492 | 276 | -43.90% |
| Others | 26,098 | 18,969 | -27.32% | 5,956 | 5,822 | -2.25% |

Source of Data: Trade Data Monitor, LLC

Table 4: Chilean Export Statistics, Value (USD)

| Commodity: 080620, Grapes, Dried (Including Raisins) | | | | | | |
|--|----------------|-------------|---------------|-------------|------------|---------------|
| Partner Country | Marketing Year | | | January-May | | |
| | MY 2023/24 | MY 2024/25 | Variation (%) | 2024 | 2025 | Variation (%) |
| The World | 142,906,565 | 149,046,800 | 4.30% | 42,463,945 | 48,373,106 | 13.92% |
| United States | 12,024,328 | 11,819,457 | -1.70% | 4,708,906 | 2,267,668 | -51.84% |
| Netherlands | 10,648,163 | 11,564,311 | 8.60% | 4,383,940 | 4,621,557 | 5.42% |
| Peru | 9,000,760 | 11,022,600 | 22.46% | 2,193,109 | 3,225,842 | 47.09% |
| China | 9,279,666 | 8,739,734 | -5.82% | 2,810,748 | 3,559,816 | 26.65% |
| United Kingdom | 7,284,297 | 8,110,017 | 11.34% | 2,350,630 | 3,074,166 | 30.78% |
| Poland | 5,973,638 | 7,700,625 | 28.91% | 1,526,487 | 3,850,068 | 152.22% |
| France | 2,759,442 | 5,540,133 | 100.77% | 1,093,051 | 1,445,764 | 32.27% |
| Spain | 4,008,997 | 5,325,040 | 32.83% | 1,897,414 | 1,797,745 | -5.25% |
| Venezuela | 4,187,989 | 4,891,179 | 16.79% | 270,070 | 194,317 | -28.05% |
| Russia | 4,147,899 | 4,791,303 | 15.51% | 1,409,541 | 1,179,907 | -16.29% |
| Lithuania | 3,355,402 | 4,306,411 | 28.34% | 1,181,524 | 1,861,030 | 57.51% |
| Colombia | 7,764,816 | 4,140,291 | -46.68% | 1,671,738 | 1,407,633 | -15.80% |
| Iraq | 2,866,067 | 4,015,603 | 40.11% | 1,047,871 | 780,449 | -25.52% |
| Denmark | 2,764,012 | 3,906,895 | 41.35% | 1,341,775 | 1,231,678 | -8.21% |
| Taiwan | 3,495,844 | 3,775,357 | 8.00% | 1,661,138 | 1,162,720 | -30.00% |
| Others | 53,345,245 | 49,397,844 | 10.30% | 12,916,003 | 16,712,746 | 10.30% |

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.