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Chile

Fresh Deciduous Fruit

Semi - Annual

2004

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Report Highlights:

Chile's apple, table grape and pear production and export forecasts are up, due to good weather conditions. In the case of apples the use of higher yield varieties and increased density in new-planted area also contributes to the production increase.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Chile's supplies of fresh apples, table grapes and pears are expected to be larger in MY2004 (Jan-Dec 2004) than the previous year and our previous forecast, mainly due to better weather conditions in most growing areas. Consequently exports of apples, table grapes and pears are expected to increase relative to our previous forecast.

Fresh Apples

Production

Apple production in volume and quality was much better than previously forecast. Good weather in the spring together with milder temperatures during summer had a positive effect on MY2004 (Jan -Dec 2004) apple production. Additionally production has been expanding slowly but steadily during the last few years due to replanting and/or grafting of significant planted areas with new, higher yielding varieties. Some producers are also increasing planting density in their orchards, which will increase total production in the coming years.

Consumption

There are no official statistics 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 larger harvest of good quality apples in MY2004 (Jan-Dec 2004) explains the expansion in export volumes, when compared to the same period last season. In addition, trade sources reported increased demand by EU member countries due to a smaller European production. Additionally, good prices together with a favorable exchange rate increased deliveries to the EU market, which is Chile's largest apple export destination.

PSD Table

Country	Chile						
Commodity	Apples, Fresh						
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	USDA Official	[Estimate]	DA Official	[Estimate]	DA Official	[Estimate]	[New]
Market Year Begin	01/2002		01/2003		01/2004		MM/YYYY
Area Planted	35090	35090	35700	35700	35775	35775	(HA)
Area Harvested	30177	30177	30250	30250	30400	30400	(HA)
Bearing Trees	12490	12490	12520	12520	12620	12620	(1000 TREES)
Non-Bearing Trees	2033	2033	2255	2255	2230	2230	(1000 TREES)
Total Trees	14523	14523	14775	14775	14850	14850	(1000 TREES)
Commercial Production	1000000	1000000	1080000	1080000	1130000	1242000	(MT)
Non-Comm. Production	10000	10000	10000	10000	10000	10000	(MT)
TOTAL Production	1010000	1010000	1090000	1090000	1140000	1252000	(MT)
TOTAL Imports	0	0	20	20	0	0	(MT)
TOTAL SUPPLY	1010000	1010000	1090020	1090020	1140000	1252000	(MT)
Domestic Fresh Consump	110000	110000	110020	113612	120000	120000	(MT)
Exports, Fresh Only	548194	548194	600000	596408	600000	720000	(MT)
For Processing	351806	351806	380000	380000	420000	412000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	1010000	1010000	1090020	1090020	1140000	1252000	(MT)

Export Trade Matrix

Country	Chile			
Commodity	Apples, Fresh			
Time Period	Ja-Dec	Units:	M.T.	
Exports for:	2003		2004	
U.S.	92551	U.S.	96896	
Others		Others		
Netherlands	72717	Netherlands	81492	
Saudi Arabia	45601	Mexico	36987	
Mexico	40959	Russia	36854	
Colombia	38727	Spain	35684	
Ecuador	37817	Saudi Arabia	33642	
Spain	36428	Italy	21877	
Peru	23187	UK	21749	
Taiwan	20691	Colombia	21737	
UK	18870	Ecuador	17046	
Italy	18777	U.Arab Emirate	16158	
Total for Others	353774		323226	
Others not Listed	150083		123737	
Grand Total	596408		543859	

Note: Export Trade Matrix data for year 2004 are for January through June only.

Fresh Table Grapes

Production

Table grape output in MY2004 (Jan-Dec 2004) is expected to exceed slightly our previous forecast level, mainly due to good weather in the northern growing areas. Industry sources have indicated that good weather conditions with normal temperatures resulted in good quality production. The good quality production together with strong foreign demand will result in an expansion in exports during this marketing year.

Consumption

As with other Chilean fresh fruits, domestically consumed table grapes are mainly export rejects. There are no official statistics on domestic consumption. Domestic fresh consumption is derived from the only known figure, which are exports and the estimated production data. Domestic consumption is estimated to account for about 10 percent of total output, while processing accounts for another 30 percent.

Trade

With the new estimates for a larger total output, table grape exports are now forecast to be higher than earlier projected in MY2004. The U.S. is the largest export market, with close to 60 percent of total shipments destined for that market. Although total trade varies up and down, the market share remains steady.

PSD Table

Country	Chile					
Commodity	Grapes, Table, Fresh					
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official	Estimate	USDA Official	Estimate	USDA Official	Estimate
Market Year Begin	01/2002		01/2003		01/2004	
						MM/YYYY
Area Planted	45383	45383	45490	45490	45490	45490 (HA)
Area Harvested	40700	40700	40750	40750	40800	40800 (HA)
Commercial Production	997000	997000	1060000	1060000	1025000	1081200 (MT)
Non-Comm. Production	5000	5000	5000	5000	5000	5000 (MT)
TOTAL Production	1002000	1002000	1065000	1065000	1030000	1086200 (MT)
TOTAL Imports	12	12	12	12	12	12 (MT)
TOTAL SUPPLY	1002012	1002012	1065012	1065012	1030012	1086212 (MT)
Domestic Fresh Consump	99000	99000	113012	113012	105012	106000 (MT)
Exports, Fresh Only	654932	654932	707000	706332	675000	730000 (MT)
For Processing	248080	248080	245000	245668	250000	250212 (MT)
Withdrawal From Market	0	0	0	0	0	0 (MT)
TOTAL UTILIZATION	1002012	1002012	1065012	1065012	1030012	1086212 (MT)

Export Trade Matrix

Country	Chile			
Commodity	Grapes, Table, Fresh			
Time Period	Jan-Dec	Units:	M.T.	
Exports for:	2003		2004	
U.S.	426732	U.S.	355300	
Others		Others		
Netherlands	54433	Netherlands	60643	
Mexico	42116	U.K.	43547	
U.K.	38397	Mexico	28970	
Ecuador	10757	Hong-Kong	20493	
Spain	10464	Russia	14557	
So. Korea	9681	Taiwan	10178	
Japan	9371	Germany	9251	
Taiwan	9239	Japan	9054	
Russia	7788	So. Korea	8430	
Germany	5757	Ecuador	7650	
Total for Others	198003		212773	
Others not Listed	81597		69267	
Grand Total	706332		637340	

Note: Export Trade Matrix data for year 2004 are for January through June only

Fresh Pears

Production

A slight increase in production for MY2004 (Jan-Dec 2004) is forecast. As the weather has also been favorable, the quality of the production is expected to be good and thus exports in MY2004 (Jan-Dec 2004) are expected to increase when compared to the previous year.

Consumption

As with other Chilean fresh fruits, domestically consumed pears are mainly export rejects. Most pears are consumed fresh because only a few existing varieties in Chile can be processed for canned pears or juice concentrates.

PSD Table

Country	Chile						
Commodity	Pears, Fresh						
					(HA)	(1000 TREES)	(MT)
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	USDA Official [Estimate [01/2002	DA Official [Estimate [01/2003	DA Official [Estimate [New] 01/2004	
Market Year Begin							MM/YYYY
Area Planted	10400	10400	10400	10400	10120	10120	(HA)
Area Harvested	9900	9900	9950	9950	9980	9980	(HA)
Bearing Trees	4790	4790	4815	4815	4830	4830	(1000 TREES)
Non-Bearing Trees	145	145	130	130	115	115	(1000 TREES)
Total Trees	4935	4935	4945	4945	4945	4945	(1000 TREES)
Commercial Production	235000	235000	245000	245000	245000	255000	(MT)
Non-Comm. Production	2000	2000	2000	2000	2000	2000	(MT)
TOTAL Production	237000	237000	247000	247000	247000	257000	(MT)
TOTAL Imports	0	0	0	0	0	0	(MT)
TOTAL SUPPLY	237000	237000	247000	247000	247000	257000	(MT)
Domestic Fresh Consump	66000	66000	69900	69900	69000	71000	(MT)
Exports, Fresh Only	119445	119445	120600	120600	120000	125000	(MT)
For Processing	51555	51555	56500	56500	58000	61000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	237000	237000	247000	247000	247000	257000	(MT)

Export Trade Matrix

Country Chile

Commodity Pears, Fresh

Time Period **Jan-Dec** Units: **M.T.**

Exports for: **2003** **2004**

U.S. **25941** U.S. **21753**

Others Others

Netherlands	27798	Netherlands	26303
Italy	9877	Italy	12841
Colombia	9698	Russia	7644
Spain	6152	Spain	7000
Peru	6109	Colombia	5659
Brazil	4639	Portugal	3621
Ecuador	4090	Mexico	3231
Mexico	3743	Peru	2699
Portugal	3076	Brazil	2659
Saudi Arabia	2984	Saudi Arabia	2585
Total for Others	78166		74242
Others not Listed	16490		17294
Grand Total	120597		113289

Note: Export Trade Matrix data for year 2004 are for January through June only.