

**Required Report:** Required - Public Distribution

**Date:** May 17, 2022

**Report Number:** CI2022-0009

**Report Name:** Fresh Deciduous Fruit Semi-annual

**Country:** Chile

**Post:** Santiago

**Report Category:** Fresh Deciduous Fruit

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**Report Highlights:**

In MY2021/22, Post projects that table grape production will increase by 15.2 percent, totaling 760,000 MT and exports will increase by 14.2 percent, totaling 600,000 metric tons. For MY2021/22, Post estimates apple production at 1,036,000 MT a 4.8 percent decrease from MY2020/21 on lower planted area. Apple exports will total 610,000 MT, a 5.2 percent decrease from MY2020/21. Considering the declining trend in pear planted area, Post estimates Chile's MY2021/22 fresh pear production to decrease by 6.9 percent and total 215,000 metric tons. Pear exports will decrease by 11.5 percent and total 112,000 MT, since shipping costs increased significantly forcing many producers to sell fruit for processing.

## Commodities:

Grapes, Table, Fresh

**Table 1: Production, Supply and Distribution Data Statistics**

| Grapes, Fresh Table<br>Market Year Begins<br>Chile | 2019/2020     |          | 2020/2021     |          | 2021/2022     |          |
|--|---------------|----------|---------------|----------|---------------|----------|
|  | Oct 2019      |          | Oct 2020      |          | Oct 2021      |          |
|  | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA)                                  | 47834         | 47834    | 45489         | 45489    | 45400         | 43104    |
| Area Harvested (HA)                                | 46000         | 46000    | 44000         | 44000    | 44000         | 43000    |
| Commercial Production (MT)                         | 780000        | 780000   | 660000        | 660000   | 805000        | 760000   |
| Non-Comm. Production (MT)                          | 4600          | 4600     | 4700          | 4700     | 5000          | 5000     |
| Production (MT)                                    | 784600        | 784600   | 664700        | 664700   | 810000        | 765000   |
| Imports (MT)                                       | 600           | 600      | 700           | 700      | 300           | 300      |
| Total Supply (MT)                                  | 785200        | 785200   | 665400        | 665400   | 810300        | 765300   |
| Fresh Dom. Consumption (MT)                        | 180200        | 180200   | 139900        | 139943   | 165300        | 165300   |
| Exports (MT)                                       | 605000        | 605000   | 525500        | 525457   | 645000        | 600000   |
| Withdrawal From Market (MT)                        | 0             | 0        | 0             | 0        | 0             | 0        |
| Total Distribution (MT)                            | 785200        | 785200   | 665400        | 665400   | 810300        | 765300   |
| (HA), (MT)   |               |          |               |          |               |          |

Source: Post estimates

## Production:

For MY2021/22 Post estimates that table grape production will increase by 15.2 percent reaching 760,000 metric tons. The rebound in production is linked to increased productivity because of normalized climatic conditions. In MY2020/21, rainfall damaged the table grape crop in the last week of January 2021, pushing down production by 15.3 percent to only 660,000 metric tons.

Despite the increase in production, table grape planted area declined over the past 10 marketing years because of low margins (see Figure 1). In MY2021/22 planted area totaled 43,104 hectares, after a 5.2 percent decrease from MY2020/21. Drought is also a problem that has caused a decline in table grape production capacity; that problem persists in MY2021/22.

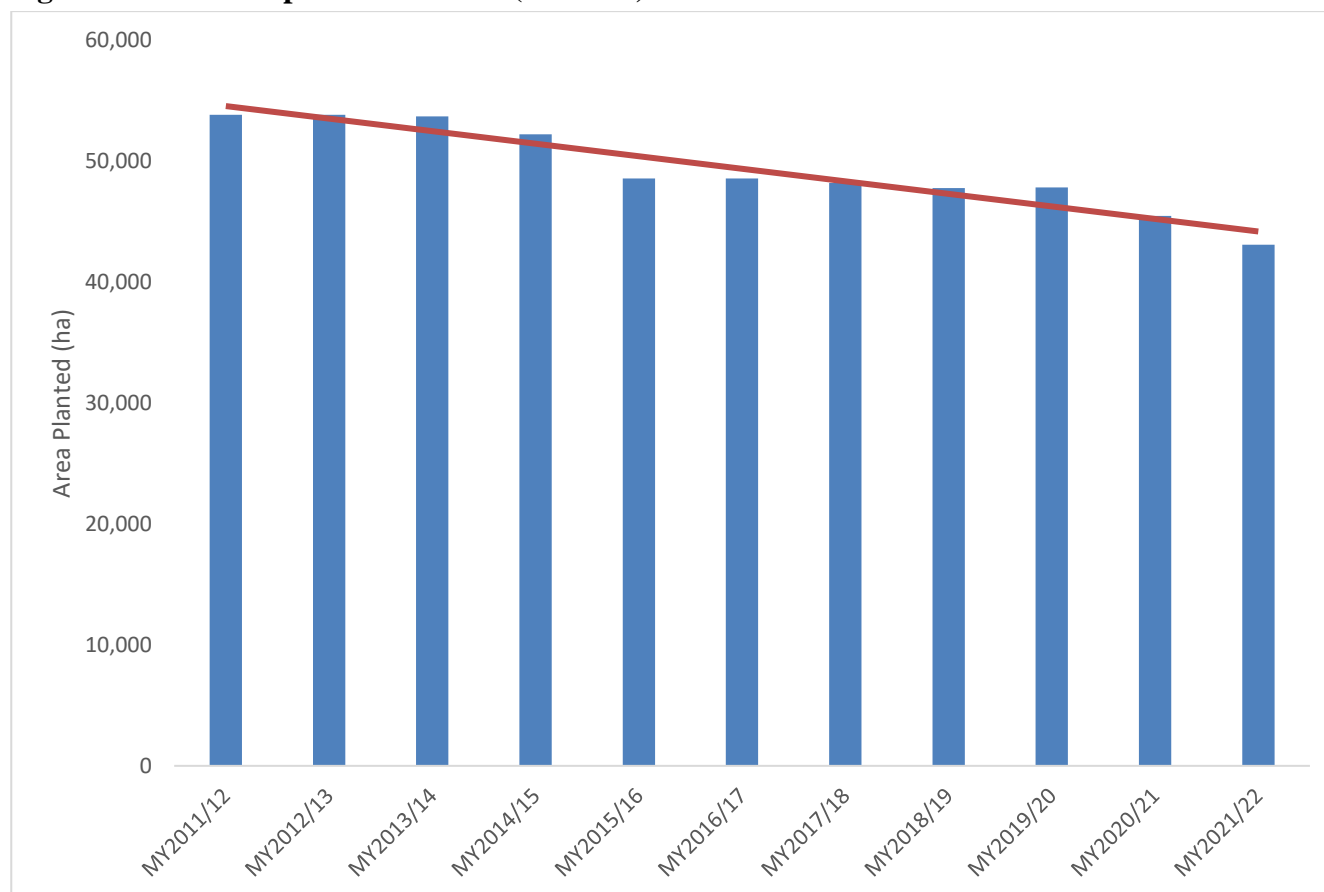
**Table 2: Table Grape Planted Area by Region MY2021/22 (hectares)**

| Region        | Planted Area (ha) | Variation* (%) | Share (%)     |
|---------------|-------------------|----------------|---------------|
| Atacama       | 5,987             | -12.4%         | 13.9%         |
| Coquimbo      | 7,321             | -10.3%         | 17.0%         |
| Valparaíso    | 9,970             | -10.9%         | 23.1%         |
| Metropolitana | 6,848             | -14.1%         | 15.9%         |
| O'Higgins     | 12,736            | -5.2%          | 29.5%         |
| Maule         | 241               | 16.7%          | 0.6%          |
| Others        | 2                 | -              | 0.0%          |
| <b>Total</b>  | <b>43,102</b>     | <b>-9.9%</b>   | <b>100.0%</b> |

\*Variation of planted area is measured every third year; data provided are last available

Source: Based on data from ODEPA

**Figure 1: Table Grape Area Planted (hectares)**



Source: ODEPA, 2022

### **Consumption:**

Post estimates that in MY2021/22 fresh domestic consumption of table grapes will reach 165,300 metric tons (MT) or 21.8 percent of commercial production. This level of consumption represents an 18.2 percent increase in fresh domestic consumption over MY2020/21 and follows an increase in table grape supply due to increased production. In MY2020/21 consumption declined due to the decrease in table grape production and overall lower supply of table on the domestic market.

### **Trade:**

In MY 2021/22, Post estimates export volume to increase by 14.2 percent, totaling 600,000 metric tons. Data until March, show that MY2021/22 year-over-year table grapes exports decreased by 1.6 percent in volume, totaling 256,524 MT (see Table 3). Nevertheless, Post expects a recovery in export volume this year. The decrease in exports early in the season is attributed to logistical delays in Chilean ports. According to the Chilean Association of Fruit Producers (FEEFRUTA), freight costs increased significantly in MY2021/22 making it economically inviable for some fruit producers to export. However, monthly exports volumes showed an increase in March 2022. Further, Post sources indicate that export volume increased significantly in April, when the bulk of table grapes are shipped (see Figure 2). Official data is forthcoming.

The United States is the main market for Chilean table grape exports accounting for 254,852 MT in MY2020/21, which represents 48.5 percent of Chilean table grape exports. In MY2021/22 (data until March), table grape exports to the United States increased by 1.9 percent reaching 180,124 MT (See Table 3).

China is the second market for Chilean table grapes accounting for 78,117 MT in MY2020/21, which represented 14.9 percent of total Chilean grape exports. Due to favorable climatic conditions this marketing year, table grape exports are higher quality and more able to travel the long distance to the Chinese market. As a result, table grape exports to China have increased by 15.4 percent thus far in MY2021/22 (data until March). Chilean exporters expect shipments to China of red globe and other red seedless varieties to increase in the remainder of MY2021/22.

**Table 3: Table Grape Export Volume to the World (MT)**

| Partner Country | Marketing Year |                |               | Year to Date         |                      |               |
|-----------------|----------------|----------------|---------------|----------------------|----------------------|---------------|
|                 | MY2019/20 (MT) | MY2020/21 (MT) | Variation (%) | Oct 20 - Mar 21 (MT) | Oct 21 - Mar 22 (MT) | Variation (%) |
| World           | 604,561        | 525,457        | -13.1%        | 260,645              | 256,524              | -1.6%         |
| United States   | 275,495        | 254,825        | -7.5%         | 176,849              | 180,124              | 1.9%          |
| China           | 111,819        | 78,117         | -30.1%        | 15,447               | 17,823               | 15.4%         |
| Netherlands     | 35,308         | 28,030         | -20.6%        | 4,897                | 5,042                | 3.0%          |
| South Korea     | 24,491         | 23,222         | -5.2%         | 15,901               | 9,130                | -42.6%        |
| United Kingdom  | 26,606         | 18,175         | -31.7%        | 3,008                | 4,497                | 49.5%         |
| Russia          | 11,002         | 14,038         | 27.6%         | 3,051                | 1,779                | -41.7%        |
| Japan           | 12,308         | 11,535         | -6.3%         | 8,637                | 9,775                | 13.2%         |
| Canada          | 16,398         | 10,892         | -33.6%        | 6,603                | 4,060                | -38.5%        |
| Spain           | 7,903          | 9,489          | 20.1%         | 3,354                | 1,987                | -40.8%        |
| Indonesia       | 2,098          | 9,392          | 347.7%        | 338                  | 447                  | 32.2%         |
| Mexico          | 13,709         | 9,112          | -33.5%        | 5,665                | 6,445                | 13.8%         |
| Ecuador         | 9,625          | 9,011          | -6.4%         | 2,976                | 2,870                | -3.6%         |
| Saudi Arabia    | 7,052          | 4,302          | -39.0%        | 1,171                | 569                  | -51.4%        |
| Portugal        | 3,805          | 3,888          | 2.2%          | 1,096                | 812                  | -25.9%        |
| Brazil          | 4,943          | 3,873          | -21.6%        | 1,029                | 1,145                | 11.3%         |
| Others          | 41,999         | 37,556         | -10.6%        | 10,623               | 10,019               | -5.7%         |

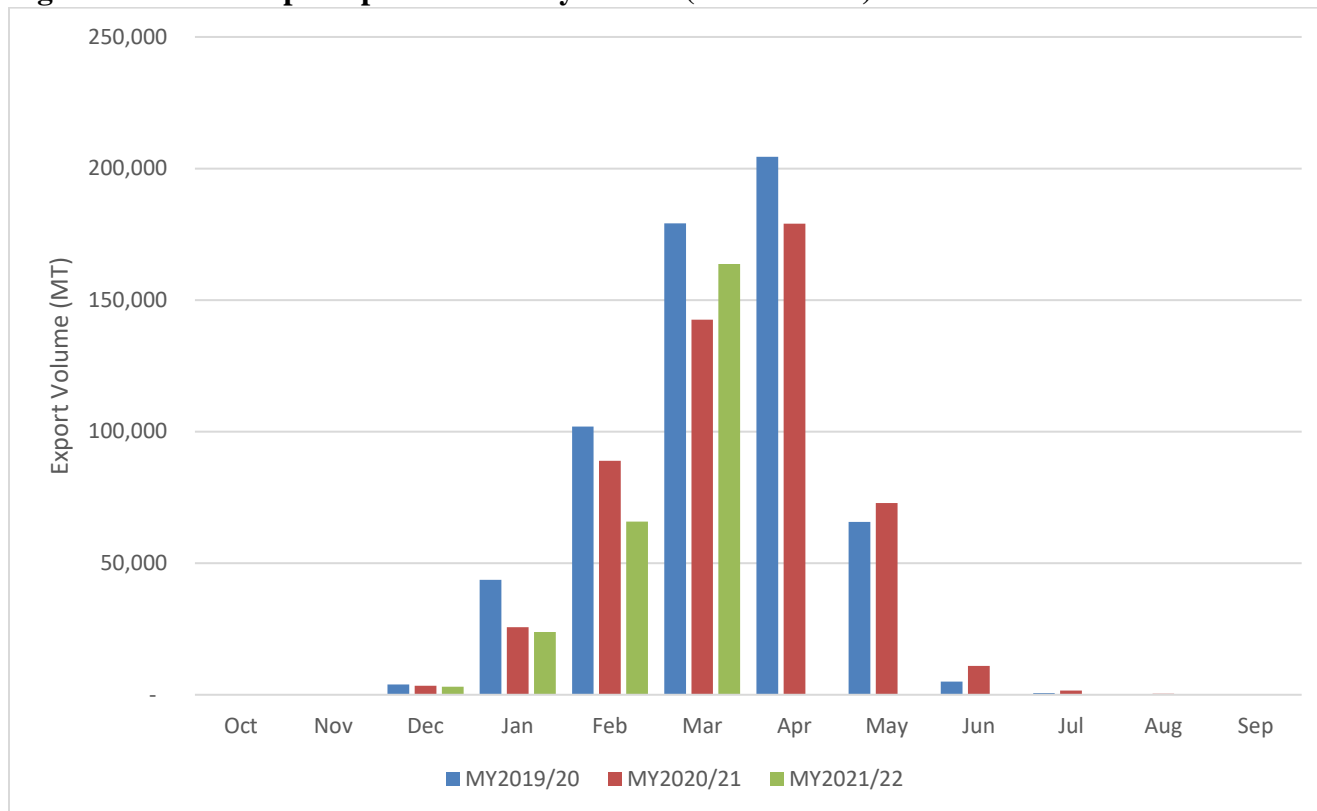
Source: Trade Data Monitor, LLC.

**Table 4: Table Grape Export Value to the World (USD)**

| Partner Country | Marketing year  |                 |               | Year to Date          |                       |               |
|-----------------|-----------------|-----------------|---------------|-----------------------|-----------------------|---------------|
|                 | MY2019/20 (USD) | MY2020/21 (USD) | Variation (%) | Oct 20 - Mar 21 (USD) | Oct 21 - Mar 22 (USD) | Variation (%) |
| World           | 926,221,114     | 826,237,153     | -10.8%        | 406,873,983           | 400,962,118           | -1.5%         |
| United States   | 382,436,706     | 366,637,286     | -4.1%         | 245,930,413           | 257,891,897           | 4.9%          |
| China           | 186,676,292     | 131,502,991     | -29.6%        | 26,714,260            | 32,519,497            | 21.7%         |
| South Korea     | 56,577,540      | 53,868,037      | -4.8%         | 37,664,531            | 21,130,782            | -43.9%        |
| Netherlands     | 45,295,153      | 37,904,086      | -16.3%        | 7,203,719             | 6,835,331             | -5.1%         |
| United Kingdom  | 44,060,556      | 29,549,365      | -32.9%        | 5,633,780             | 7,373,435             | 30.9%         |
| Canada          | 24,915,288      | 23,442,866      | -5.9%         | 15,110,468            | 8,053,412             | -46.7%        |
| Russia          | 16,744,751      | 20,961,924      | 25.2%         | 4,912,363             | 3,338,520             | -32.0%        |
| Japan           | 22,521,017      | 20,838,279      | -7.5%         | 17,202,691            | 19,574,504            | 13.8%         |
| Spain           | 13,217,362      | 16,293,201      | 23.3%         | 6,113,440             | 3,221,741             | -47.3%        |
| Ecuador         | 15,163,986      | 14,451,363      | -4.7%         | 5,535,299             | 5,288,493             | -4.5%         |
| Mexico          | 22,721,460      | 14,074,790      | -38.1%        | 8,605,508             | 10,390,895            | 20.7%         |
| Indonesia       | 3,137,405       | 13,779,387      | 339.2%        | 585,417               | 852,138               | 45.6%         |
| Saudi Arabia    | 11,138,919      | 7,059,559       | -36.6%        | 2,025,598             | 977,535               | -51.7%        |
| Taiwan          | 9,883,607       | 6,351,691       | -35.7%        | 2,755,622             | 3,260,376             | 18.3%         |
| Portugal        | 5,368,346       | 6,020,558       | 12.1%         | 1,669,911             | 1,186,989             | -28.9%        |
| Others          | 66,362,726      | 63,501,770      | -4.3%         | 19,210,963            | 19,066,573            | -0.8%         |

Source: Trade Data Monitor, LLC.

**Figure 2: Table Grape Export Volume by Month (Metric Tons)**



Source: Trade Data Monitor, LLC.

**Policy:**

Chile seeks a systems approach to improve market access to the United States for three Chilean growing regions: *Atacama*, *Coquimbo*, and *Valparaiso*. A systems approach would benefit the three Chilean regions by helping them avoid using methyl bromide fumigation to mitigate against European grapevine moth. Fumigation significantly decreases the quality and shelf life of the fruit, which results in lower prices from retailers. Further, fumigated product is ineligible to be certified USDA organic. USDA’s Animal and Plant Health Inspection Service published a Pest Risk Analysis associated with the systems approach on Feb 14, 2022. The comment period ended on March 29, 2022, and regulators are currently reviewing the comments.

The Chilean Ministry of Agriculture through the Agricultural and Livestock Service (SAG) is implementing the [2021/22 National Program for the control of Grapevine Moth \(\*Lobesia botrana\*\)](#). The program is designed to eradicate the pest entirely in Chile. The updated controls associated with the program are mandatory for all table grape producers throughout the country.

## Commodities:

Apples, Fresh

**Table 5: Production, Supply and Distribution Data Statistics**

| Apples, Fresh<br>Market Year Begins<br>Chile | 2019/2020     |          | 2020/2021     |          | 2021/2022     |          |
|--|---------------|----------|---------------|----------|---------------|----------|
|  | Jan 2020      |          | Jan 2021      |          | Jan 2022      |          |
|  | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA)                            | 32371         | 32371    | 32314         | 32314    | 32300         | 30967    |
| Area Harvested (HA)                          | 31300         | 31300    | 31300         | 31300    | 31300         | 30000    |
| Bearing Trees (1000 TREES)                   | 34430         | 34430    | 34430         | 34430    | 34400         | 33000    |
| Non-Bearing Trees (1000 TREES)               | 2400          | 2400     | 2400          | 2400     | 2400          | 2300     |
| Total Trees (1000 TREES)                     | 36830         | 36830    | 36830         | 36830    | 36800         | 35300    |
| Commercial Production (MT)                   | 1115000       | 1115000  | 1085000       | 1088700  | 1080000       | 1036000  |
| Non-Comm. Production (MT)                    | 9000          | 9000     | 10000         | 10000    | 10000         | 10000    |
| Production (MT)                              | 1124000       | 1124000  | 1095000       | 1098700  | 1090000       | 1046000  |
| Imports (MT)                                 | 2900          | 2900     | 3000          | 3000     | 3000          | 3000     |
| Total Supply (MT)                            | 1126900       | 1126900  | 1098000       | 1101700  | 1093000       | 1049000  |
| Domestic Consumption (MT)                    | 467000        | 467000   | 458000        | 458000   | 458000        | 439000   |
| Exports (MT)                                 | 659900        | 659900   | 640000        | 643700   | 635000        | 610000   |
| Withdrawal From Market (MT)                  | 0             | 0        | 0             | 0        | 0             | 0        |
| Total Distribution (MT)                      | 1126900       | 1126900  | 1098000       | 1101700  | 1093000       | 1049000  |
| (HA) (1000 TREES) (MT)                       |               |          |               |          |               |          |

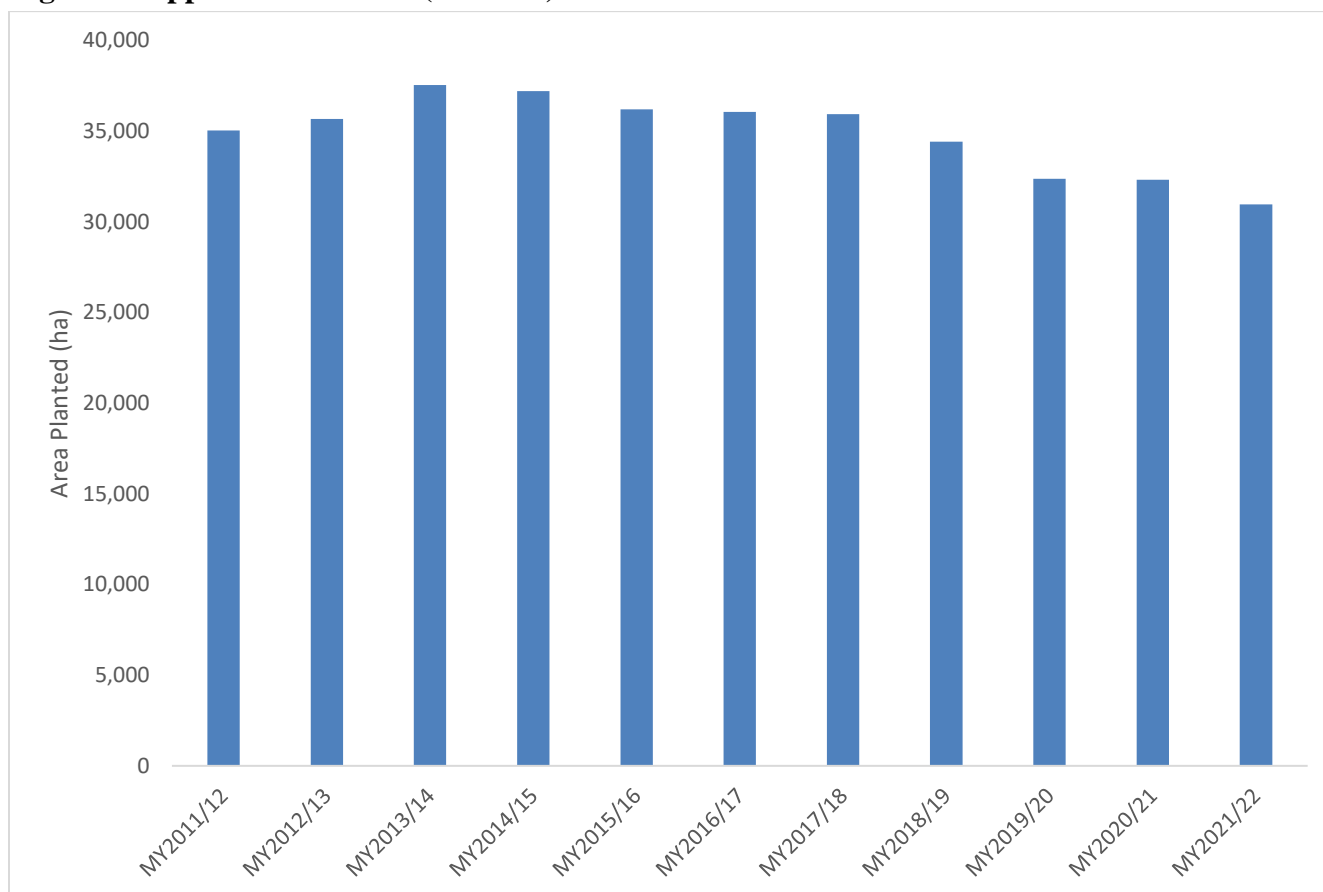
Source: Post estimates

## Production:

Post estimates MY2021/22 apple production at 1,036,000 MT a 4.8 percent decrease from MY2020/21 following a decrease in planted area (See Table 5 and Figure 3). In MY2021/22, area planted in apples decreased by 4.2 percent totaling 30,097 hectares. The *Maule* and *O'Higgins* regions in the central-south part of the country hold 63.4 percent and 20.6 percent of the area planted, respectively, making up for 84 percent of the total area planted. However, since fruit producers keep shifting to more profitable crops, such as cherries or walnuts, planted area in these two regions decreased in the past three marketing years (see Table 6).

Conversely, planted area in *Araucanía* region grew by 10.6 percent in the past three market years totaling 3,061 hectares and 9.9 percent of the area planted with apples in Chile. In the *Araucanía* region, an area with abundant rainfall located in the southern part of Chile, producers have found in apples a profitable alternative to traditional crops such as wheat or oats.

**Figure 3: Apple Planted Area (hectares)**



Source: ODEPA, 2022

**Table 6: Apple Planted Area by Region MY2021/22 (hectares)**

| Region        | Planted Area (ha) | Variation* (%) | Share (%)     |
|---------------|-------------------|----------------|---------------|
| Valparaíso    | 144               | -4.1%          | 0.5%          |
| Metropolitana | 83                | -38.0%         | 0.3%          |
| O'Higgins     | 6,388             | -17.4%         | 20.6%         |
| Maule         | 19,637            | -11.0%         | 63.4%         |
| Ñuble         | 1,004             | 8.7%           | 3.2%          |
| Biobío        | 623               | -2.2%          | 2.0%          |
| Araucanía     | 3,061             | 10.6%          | 9.9%          |
| Others        | 27                | -              | 0.1%          |
| <b>Total</b>  | <b>30,967</b>     | <b>-10.1%</b>  | <b>100.0%</b> |

\*Variation of planted area is measured every third year; data provided are last available

Source: ODEPA, 2022



**Consumption:**

For MY2021/22, Post estimates domestic consumption of apples (including fresh and processed) will total 439,000 MT, which represents 42.4 percent of the total commercial apple production. This domestic consumption volume represents a 4.1 percent decrease from MY2020/21 domestic consumption, and it is explained by the decrease in apple production.

**Policy**

No new policy developments to report.

**Trade:**

For MY2021/22, Post estimates Chilean apple exports to total 610,000 MT, a 5.2 percent decrease from MY2020/21. In MY2021/22 (data until March), Chilean apple exports totaled 45,552 MT, a 24.1 percent decrease from MY2020/21. At the beginning of MY2021/22, one of the main issues in the Chilean fresh fruit export industry was the increase of freight costs and the high demand at Chilean ports, causing delays in exports. Apple exports should catch up during the remainder of MY2021/22 and closer to the peak export months of May, June, and July (see Figure 4).

One of the main advantages that apple exporters have over other fruit exporters is that apples can endure a longer storage time than other fruit, such as table grapes. Thus, exporters can store apples and wait for better market or logistical conditions.

Chile exports apples to 70 different markets. In MY2020/21, Chile sent 74,348 MT of apples to Colombia, which represented 11.5 percent of total apple exports (see Table 7). Colombia has historically been a top market for Chilean apples and in MY2021/22 it remains as the top destination (data until March).

The United States is also a historically top market for Chilean apples. In MY2020/21, Chile exported 60,496 MT to the United States, which represented 9.4 percent of exports. India is a fast-growing market for Chilean apples exports. In MY2020/21, Chile sent 56,297 MT to India, which represented 8.7 percent of exports and 172.7 percent growth over MY2019/20.

**Table 7: Apple Export Volume to the World (MT)**

| Partner Country | Marketing year |                |               | Year to Date        |                     |               |
|-----------------|----------------|----------------|---------------|---------------------|---------------------|---------------|
|                 | MY2019/20 (MT) | MY2020/21 (MT) | Variation (%) | Jan - Mar 2021 (MT) | Jan - Mar 2022 (MT) | Variation (%) |
| World           | 659,875        | 643,736        | -2.4%         | 60,026              | 45,552              | -24.1%        |
| Colombia        | 74,158         | 74,348         | 0.3%          | 15,267              | 14,504              | -5.0%         |
| United States   | 52,841         | 60,496         | 14.5%         | 791                 | 1,324               | 67.4%         |
| India           | 20,643         | 56,297         | 172.7%        | 7,011               | 1,241               | -82.3%        |
| Ecuador         | 52,705         | 52,586         | -0.2%         | 9,543               | 7,883               | -17.4%        |
| Netherlands     | 41,452         | 49,013         | 18.2%         | 1,725               | 981                 | -43.1%        |
| Saudi Arabia    | 51,875         | 35,913         | -30.8%        | 6,212               | 2,154               | -65.3%        |
| Peru            | 41,860         | 35,330         | -15.6%        | 4,472               | 4,879               | 9.1%          |
| Taiwan          | 38,964         | 34,093         | -12.5%        | 80                  | -                   | -100.0%       |
| United Kingdom  | 29,810         | 30,080         | 0.9%          | 775                 | 246                 | -68.3%        |
| Germany         | 21,505         | 26,662         | 24.0%         | 170                 | 41                  | -75.9%        |
| France          | 15,503         | 17,556         | 13.2%         | 812                 | 402                 | -50.5%        |
| Bolivia         | 20,869         | 16,514         | -20.9%        | 3,199               | 2,165               | -32.3%        |
| Guatemala       | 7,451          | 14,255         | 91.3%         | 1,561               | 1,381               | -11.5%        |
| Brazil          | 47,885         | 12,722         | -73.4%        | 533                 | 2,011               | 277.3%        |
| Canada          | 9,293          | 11,199         | 20.5%         | 61                  | 1,029               | 1586.9%       |
| Others          | 133,061        | 116,672        | -12.3%        | 7,814               | 5,311               | -32.0%        |

Source: Trade Data Monitor, LLC.

**Table 8: Apple Export Value to the World (USD)**

| Partner Country | Marketing year  |                 |               | Year to Date         |                      |               |
|-----------------|-----------------|-----------------|---------------|----------------------|----------------------|---------------|
|                 | MY2019/20 (USD) | MY2020/21 (USD) | Variation (%) | Jan - Mar 2021 (USD) | Jan - Mar 2022 (USD) | Variation (%) |
| World           | 568,584,995     | 589,512,674     | 3.7%          | 52,176,557           | 39,512,269           | -24.3%        |
| Colombia        | 64,724,614      | 70,492,351      | 8.9%          | 14,966,746           | 14,129,066           | -5.6%         |
| United States   | 59,247,479      | 67,399,039      | 13.8%         | 712,261              | 1,243,434            | 74.6%         |
| Netherlands     | 37,219,073      | 46,778,817      | 25.7%         | 1,452,003            | 860,480              | -40.7%        |
| India           | 15,652,391      | 44,566,566      | 184.7%        | 5,661,817            | 837,583              | -85.2%        |
| Ecuador         | 38,500,026      | 40,307,932      | 4.7%          | 8,094,648            | 6,810,657            | -15.9%        |
| Taiwan          | 37,934,380      | 32,924,640      | -13.2%        | 99,445               | -                    | -100.0%       |
| Saudi Arabia    | 46,261,905      | 32,275,700      | -30.2%        | 5,427,082            | 1,902,178            | -65.0%        |
| United Kingdom  | 28,343,967      | 29,741,943      | 4.9%          | 724,411              | 256,831              | -64.5%        |
| Peru            | 29,471,879      | 26,381,020      | -10.5%        | 3,436,482            | 3,323,166            | -3.3%         |
| Germany         | 18,648,339      | 24,591,716      | 31.9%         | 184,955              | 15,386               | -91.7%        |
| France          | 14,761,744      | 17,033,893      | 15.4%         | 661,286              | 323,581              | -51.1%        |
| Guatemala       | 6,573,975       | 13,830,420      | 110.4%        | 1,577,685            | 1,428,528            | -9.5%         |
| Canada          | 9,328,960       | 12,214,931      | 30.9%         | 61,081               | 1,080,613            | 1669.1%       |
| Brazil          | 36,586,530      | 11,640,880      | -68.2%        | 566,256              | 1,738,685            | 207.0%        |
| El Salvador     | 7,451,401       | 9,385,269       | 26.0%         | 1,209,403            | 733,751              | -39.3%        |
| Others          | 117,878,332     | 109,947,557     | -6.7%         | 7,340,996            | 4,828,330            | -34.2%        |

Source: Trade Data Monitor, LLC.

**Figure 4: Apple Export Volume by Month (Metric Tons)**



Source: Trade Data Monitor, LLC.

## Commodities:

Pears, Fresh

**Table 9: Production, Supply and Distribution Data Statistics:**

| Pears, Fresh<br>Market Year Begins<br>Chile | 2019/2020     |          | 2020/2021     |          | 2021/2022     |          |
|---|---------------|----------|---------------|----------|---------------|----------|
|   | Jan 2020      |          | Jan 2021      |          | Jan 2022      |          |
|   | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA)                           | 7272          | 7272     | 6950          | 6950     | 6700          | 6165     |
| Area Harvested (HA)                         | 7250          | 7250     | 6700          | 6700     | 6500          | 6000     |
| Bearing Trees (1000 TREES)                  | 7500          | 7500     | 7000          | 7000     | 6600          | 6200     |
| Non-Bearing Trees (1000 TREES)              | 900           | 900      | 1000          | 1000     | 1100          | 900      |
| Total Trees (1000 TREES)                    | 8400          | 8400     | 8000          | 8000     | 7700          | 7100     |
| Commercial Production (MT)                  | 220000        | 220000   | 231000        | 231011   | 215000        | 215000   |
| Non-Comm. Production (MT)                   | 2000          | 2000     | 2000          | 2000     | 2000          | 2000     |
| Production (MT)                             | 222000        | 222000   | 233000        | 233011   | 217000        | 217000   |
| Imports (MT)                                | 800           | 800      | 500           | 500      | 500           | 500      |
| Total Supply (MT)                           | 222800        | 222800   | 233500        | 233511   | 217500        | 217500   |
| Domestic Consumption (MT)                   | 108800        | 108800   | 113500        | 107000   | 105500        | 105500   |
| Exports (MT)                                | 114000        | 114000   | 120000        | 126511   | 112000        | 112000   |
| Withdrawal From Market (MT)                 | 0             | 0        | 0             | 0        | 0             | 0        |
| Total Distribution (MT)                     | 222800        | 222800   | 233500        | 233511   | 217500        | 217500   |
|   |               |          |               |          |               |          |

(HA), (1000 TREES), (MT)

Source: Post estimates

## Production:

In MY2021/22, pear planted area decreased by 11.3 percent totaling 6,165 hectares (See Figure 5). Planted area has decreased gradually for the past five marketing years as pear margins decrease in comparison to other fruit crops. The *O'Higgins* and *Maule* regions hold 90.5 percent of the pear planted area in Chile, and planted area in these regions decreased by 17.5 and 32.2 percent, respectively (see Table 10). Considering the declining trend in planted area, Post estimates Chile's MY2021/22 fresh pear production to decrease by 6.9 percent and total 215,000 MT (see Table 9).

## Consumption:

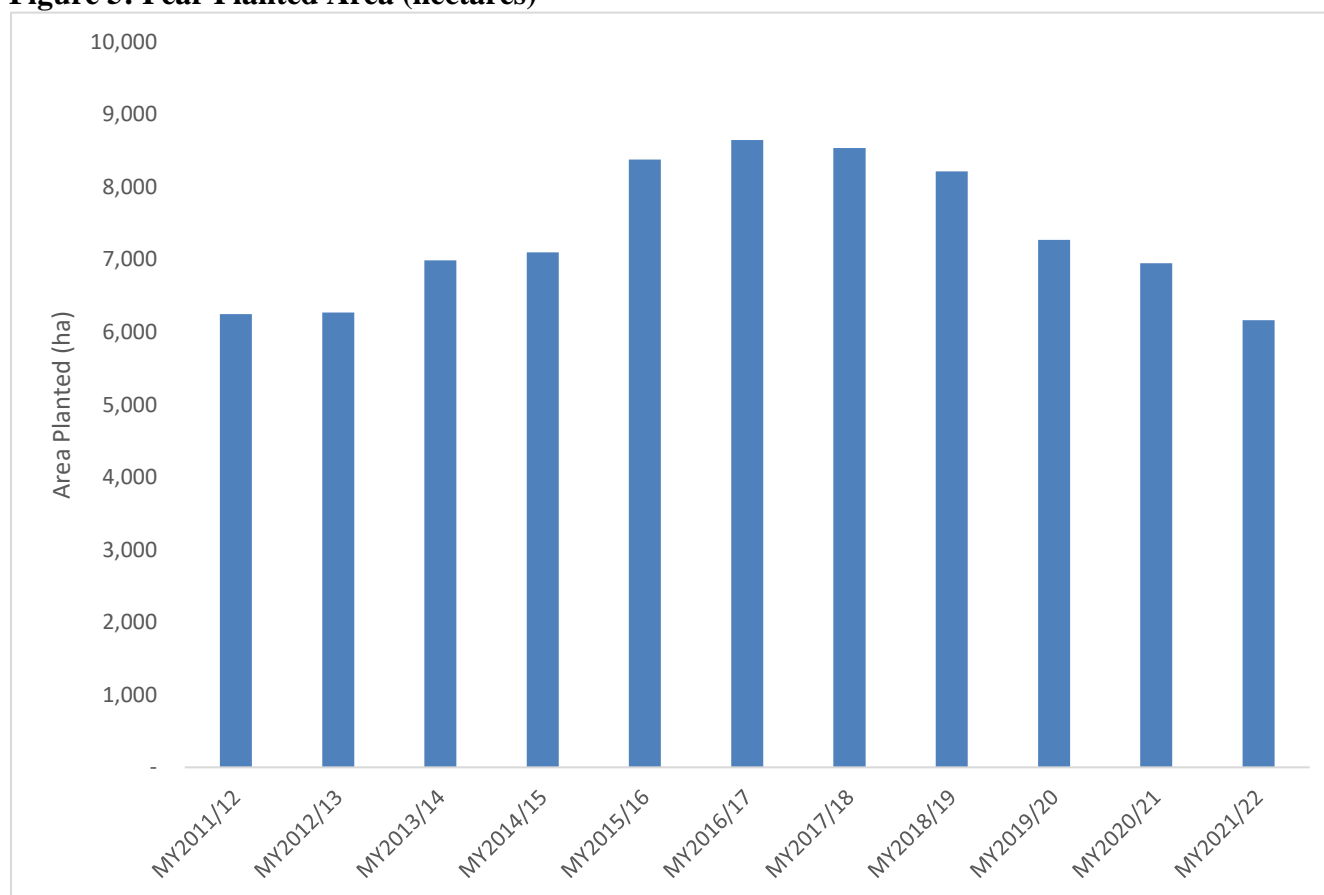
In MY2021/22, Post estimates domestic consumption of pears to decrease by 1.4 percent and total 105,500 MT following the decrease in production. Consumption includes fresh domestic consumption and further processing, which represents 49 percent of total pear production.

The 1.4 percent decrease in consumption is lower than the 7.4 percent decrease in production, which is explained by the increase in shipping costs. With higher shipping costs, producers opted to sell a larger part of their production for processing, thus increasing domestic consumption.

## Policy

No new policy developments to report.

**Figure 5: Pear Planted Area (hectares)**



Source: ODEPA, 2022

**Table 10: Pear Area Planted by Region MY2021/22 (hectares)**

| Region        | Planted Area (ha) | Variation* (%) | Share (%)     |
|---------------|-------------------|----------------|---------------|
| Metropolitana | 479.74            | -35.0%         | 7.8%          |
| O'Higgins     | 3,715             | -17.5%         | 60.3%         |
| Maule         | 1,859             | -32.2%         | 30.2%         |
| Others        | 111               | -              | 1.8%          |
| <b>Total</b>  | <b>6,165</b>      | <b>-25.0%</b>  | <b>100.0%</b> |

\*Variation of planted area is measured every third year; data provided are last available

Source: ODEPA, 2022

### Trade:

For MY2021/22, Post estimates pear exports to decrease by 11.5 percent and total 112,000 MT due to the decrease in pear planted area and lower production volume. In MY2021/22 (data until March) Chile decreased exports by 16.9 percent, totaling 32,404 MT (see Table 11).

Chile's top markets for fresh pear exports are Italy, Colombia, Russia, and the Netherlands. In MY2021/22 (data until March), exports to Colombia increased by 5.2 percent totaling 5,069 MT, making it the top market for Chilean pears. In MY2020/21, Russia was one of the markets where the

Abate Fetel variety received good acceptance and Chile was looking to expand its pear exports into Russia. However, year-over-year pear exports to the country decreased by 7.4 percent from January to March 2022. Chile continued to export pears to Russia in April and the first weeks of May 2022. Post expects pear exports to Russia to decrease even more in the remainder of the marketing year due to the ongoing conflict.

**Table 11: Pear Export Volume to the World (MT)**

| Partner Country | Marketing year    |                   |                  | Year to Date           |                        |                  |
|-----------------|-------------------|-------------------|------------------|------------------------|------------------------|------------------|
|                 | MY2019/20<br>(MT) | MY2020/21<br>(MT) | Variation<br>(%) | Jan - Mar<br>2021 (MT) | Jan - Mar<br>2022 (MT) | Variation<br>(%) |
| World           | 113,954           | 126,511           | 11.0%            | 38,994                 | 32,404                 | -16.9%           |
| Italy           | 14,394            | 18,649            | 29.6%            | 9,361                  | 4,692                  | -49.9%           |
| Colombia        | 18,676            | 16,687            | -10.7%           | 4,817                  | 5,069                  | 5.2%             |
| Russia          | 11,672            | 13,531            | 15.9%            | 1,574                  | 1,458                  | -7.4%            |
| Netherlands     | 12,716            | 12,650            | -0.5%            | 3,549                  | 4,460                  | 25.7%            |
| Ecuador         | 9,446             | 11,847            | 25.4%            | 2,435                  | 2,757                  | 13.2%            |
| United States   | 9,206             | 8,560             | -7.0%            | 3,333                  | 3,194                  | -4.2%            |
| Peru            | 8,742             | 8,260             | -5.5%            | 2,039                  | 1,534                  | -24.8%           |
| Spain           | 5,279             | 7,643             | 44.8%            | 5,572                  | 3,109                  | -44.2%           |
| Germany         | 5,060             | 3,839             | -24.1%           | 595                    | 669                    | 12.4%            |
| China           | 2,541             | 2,497             | -1.7%            | 85                     | 233                    | 174.1%           |
| Saudi Arabia    | 2,297             | 2,436             | 6.1%             | 1,394                  | 937                    | -32.8%           |
| Mexico          | 1,279             | 2,353             | 84.0%            | 181                    | 137                    | -24.3%           |
| Brazil          | 1,620             | 1,994             | 23.1%            | 315                    | 401                    | 27.3%            |
| Panama          | 1,350             | 1,799             | 33.3%            | 472                    | 453                    | -4.0%            |
| India           | 155               | 1,699             | 996.1%           | 45                     | -                      | -100.0%          |
| Others          | 9,521             | 12,067            | 26.7%            | 3,227                  | 3,301                  | 2.3%             |

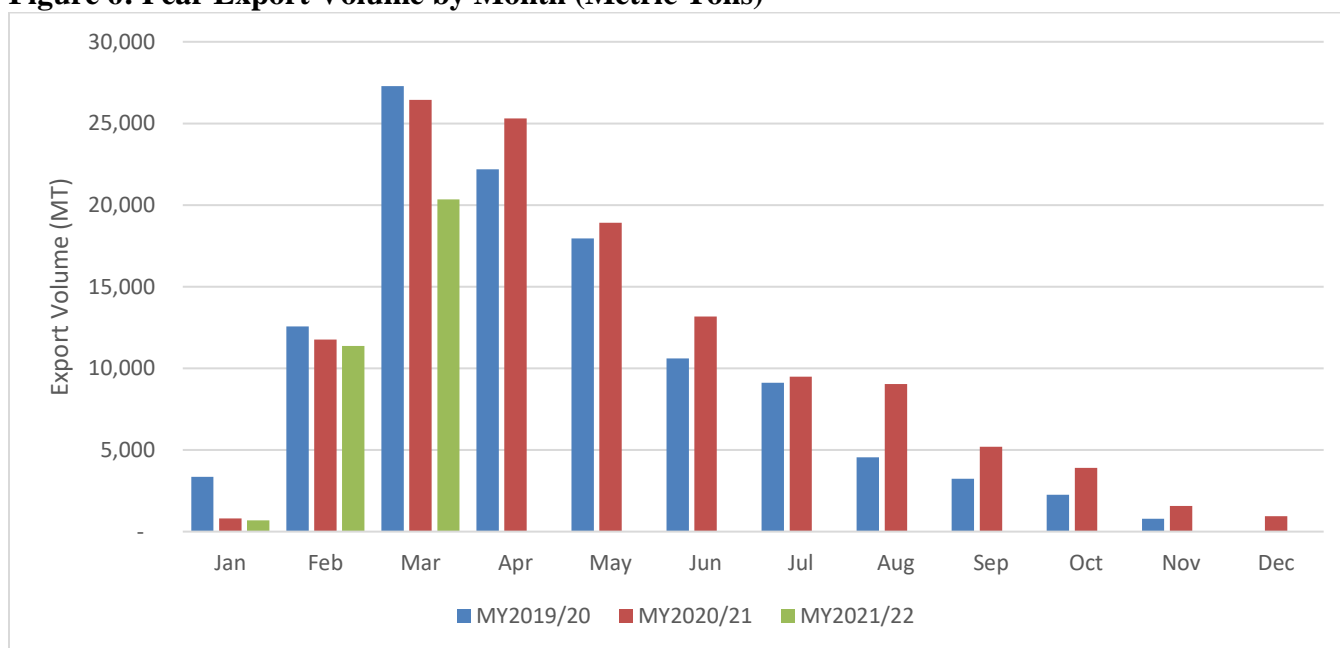
Source: Trade Data Monitor, LLC.

**Table 12: Pear Export Value to the World (USD)**

| Partner Country | Marketing year  |                 |               | Year to Date         |                      |               |
|-----------------|-----------------|-----------------|---------------|----------------------|----------------------|---------------|
|                 | MY2019/20 (USD) | MY2020/21 (USD) | Variation (%) | Jan - Mar 2021 (USD) | Jan - Mar 2022 (USD) | Variation (%) |
| World           | 109,426,528     | 124,376,276     | 13.7%         | 39,587,996           | 32,905,558           | -16.9%        |
| Italy           | 13,776,978      | 19,405,055      | 40.9%         | 10,017,465           | 4,461,146            | -55.5%        |
| Colombia        | 17,768,052      | 17,267,915      | -2.8%         | 4,962,623            | 5,214,240            | 5.1%          |
| Russia          | 12,297,762      | 13,990,211      | 13.8%         | 1,571,445            | 1,663,988            | 5.9%          |
| Netherlands     | 13,460,683      | 13,982,155      | 3.9%          | 3,830,695            | 5,019,941            | 31.0%         |
| Ecuador         | 8,192,098       | 9,908,370       | 21.0%         | 2,345,060            | 2,681,293            | 14.3%         |
| Spain           | 5,703,585       | 7,457,034       | 30.7%         | 5,514,718            | 3,007,069            | -45.5%        |
| United States   | 7,729,322       | 7,450,740       | -3.6%         | 3,127,970            | 3,224,681            | 3.1%          |
| Peru            | 6,364,392       | 6,204,098       | -2.5%         | 1,663,940            | 1,399,961            | -15.9%        |
| Germany         | 4,934,175       | 3,313,144       | -32.9%        | 453,571              | 571,328              | 26.0%         |
| China           | 2,836,696       | 2,814,957       | -0.8%         | 97,643               | 266,640              | 173.1%        |
| Saudi Arabia    | 2,662,032       | 2,731,065       | 2.6%          | 1,501,142            | 1,100,381            | -26.7%        |
| Mexico          | 1,091,814       | 2,185,807       | 100.2%        | 175,552              | 109,132              | -37.8%        |
| Brazil          | 1,645,348       | 1,978,677       | 20.3%         | 335,185              | 404,610              | 20.7%         |
| Panama          | 1,309,400       | 1,898,491       | 45.0%         | 466,083              | 512,329              | 9.9%          |
| India           | 143,353         | 1,706,486       | 1090.4%       | 47,509               | -                    | -100.0%       |
| Others          | 9,510,838       | 12,082,071      | 27.0%         | 3,477,395            | 3,268,819            | -6.0%         |

Source: Trade Data Monitor, LLC.

**Figure 6: Pear Export Volume by Month (Metric Tons)**



Source: Trade Data Monitor, LLC.

**Attachments:**

No Attachments