Required Report: Required - Public Distribution **Date:** August 19, 2025

Report Number: CI2025-0017

Report Name: Stone Fruit Annual

Country: Chile

Post: Santiago

Report Category: Stone Fruit

Prepared By: Sergio Gonzalez

Approved By: Amanda Hinkle

Report Highlights:

Post projects exports of Chilean cherries to grow significantly in the coming years, driven by strong international demand, particularly from China. Post estimates cherry production in marketing year (MY) 2024/25 to reach 730,000 metric tons (MT), a 6.7 increase over MY 2024/25. Chilean cherry exports will increase by 7.2 percent reaching 670,000 MT. In MY 2024/25, Post estimates nectarine and peach production to total 205,000 MT, a 3.4 percent increase over MY 2024/25. Peach and nectarine exports will increase by 3.4 percent totaling 146,000 metric tons. This growth reflects the continued expansion of nectarine planting, which offsets the decline in fresh peach area planted.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Commodity:
Fresh Cherries, (Sweet & Sour)

Table 1: Production, Supply and Distribution Data Statistics

Cherries (Sweet&Sour), Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Nov 2023		Nov 2024		Nov 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	63500	63500	67000	76447	0	80000
Area Harvested (HA)	55000	55000	58000	71000	0	74000
Bearing Trees (1000 TREES)	38000	38000	42000	45800	0	48000
Non-Bearing Trees (1000 TREES)	2000	2000	2000	2000	0	2000
Total Trees (1000 TREES)	40000	40000	44000	47800	0	50000
Commercial Production (MT)	468000	468000	500000	682000	0	728000
Non-Comm. Production (MT)	2000	2000	2000	2208	0	2000
Production (MT)	470000	470000	502000	684208	0	730000
Imports (MT)	0	0	0	0	0	0
Total Supply (MT)	470000	470000	502000	684208	0	730000
Domestic Consumption (MT)	56000	56000	57000	59000	0	60000
Exports (MT)	414000	414000	445000	625208	0	670000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	470000	470000	502000	684208	0	730000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

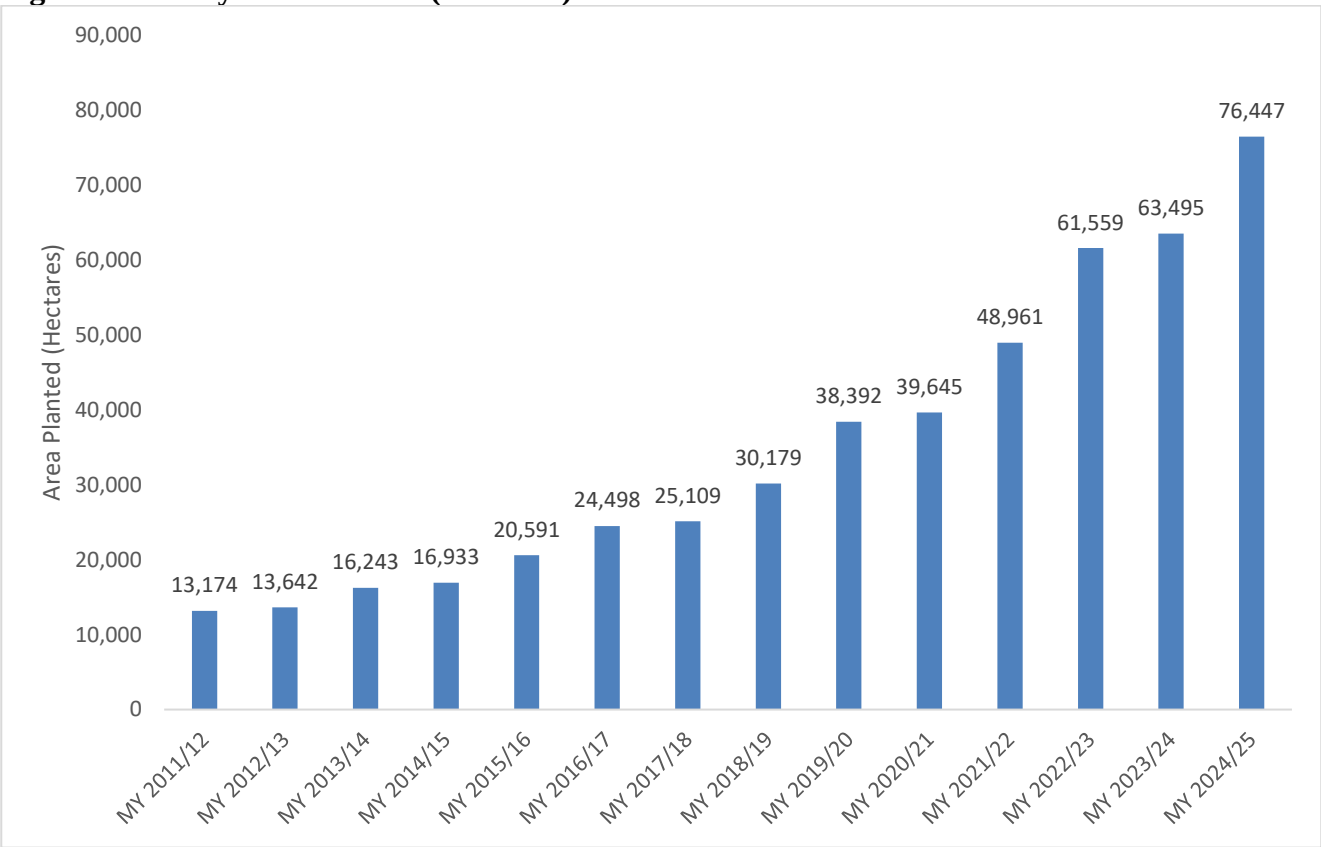
Production:

In MY 2025/26, Post estimates that cherry area planted will reach 80,000 hectares (ha), representing a 4.6 percent increase over MY 2024/25 (Table 1). This growth reflects the continued profitability of cherry production and sustained high demand, particularly from the Chinese market. Chile's cherry industry has demonstrated consistent expansion over the past decade, driven by favorable export opportunities and strong market dynamics.

Post estimates area harvested at 74,000 ha, reflecting the maturity of previously planted orchards. Cherry production typically begins 4-5 years after planting, and the increase in harvested area aligns with the growth in planted area observed in prior years.

Chilean cherry production volume is expected to reach 730,000 metric tons (MT) in MY 2025/26, a 6.7 percent increase over MY 2024/25. This growth is attributed to the expansion in area planted and assuming regular climatic conditions. While MY 2024/25 benefited from abundant winter rainfall and sufficiently low temperatures, MY 2025/26 assumes regular climatic conditions during the spring, supporting standard yields.

Figure 1: Cherry Area Planted (Hectares)



Source: based in ODEPA, 2025
* Post estimation

According to updated data from the Chilean Ministry of Agriculture's Office of Agricultural Studies and Policy (ODEPA), the *Maule* region, located in the central-south part of Chile, remains the top cherry production region in the country, with 32,801 hectares planted, representing 42.9 percent of the total area planted (Table 2). The *O'Higgins* region, situated in the central part of Chile, follows with 29,935 hectares planted, accounting for 39.2 percent of the total area. Together, these two regions dominate cherry production in Chile due to their ideal growing conditions, which include sufficient chill hours during winter, adequate water for irrigation, and moderate risk of spring frosts.

Chilean producers often use plastic rooftops to protect cherry orchards from potential damage caused by rainfall. Rainfall during critical periods, such as bloom or harvest months (September to February), poses a risk in most production areas, making protective rooftops a necessity for cherry growers.

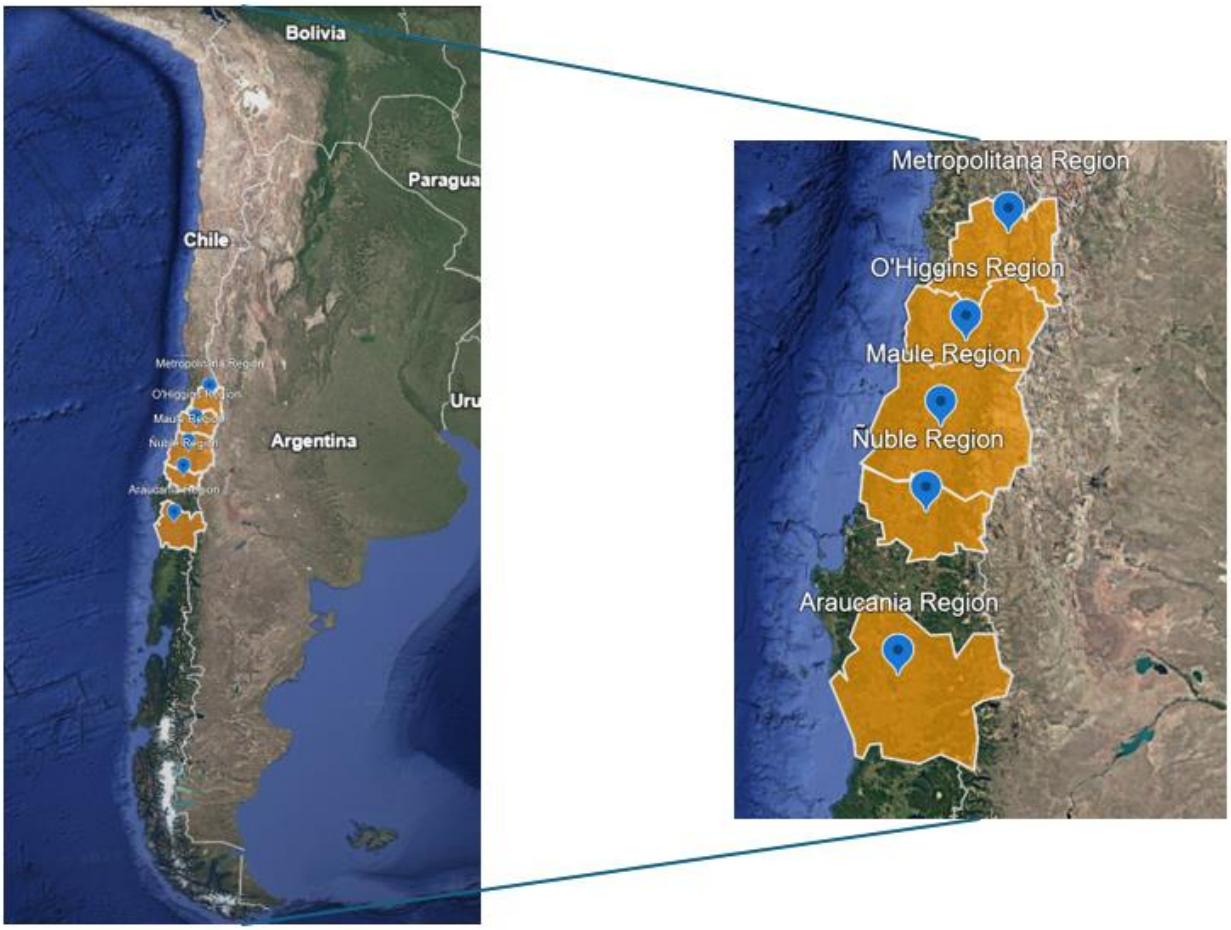
The top cherry varieties produced in Chile are Santina, Lapins, and Regina. Santina became the preferred variety for new projects due to its adaptability to Chile's climate and its long post-harvest resistance, which is essential for exporting cherries to distant markets like China. Other varieties produced in Chile include Bing, Sweetheart, Rainier, Royal Dawn, Skeena, and Kordia.

Table 2: Cherry Area Planted by Region (Hectares)

Region	Area Planted (ha)	Three-Year Variation (%)	Share (%)
Maule	32,801	17.9%	42.9%
O'Higgins	29,935	30.3%	39.2%
Metropolitana	5,430	47.5%	7.1%
Ñuble	3,062	3.0%	4.0%
La Araucanía	1,859	13.7%	2.4%
Others	3,360	-	4.4%
Total	**76,447**	**24.1%**	**100.0%**

Source: ODEPA, 2025

Map 1: Cherry Production Regions in Chile.



Source: Google Earth

Trade:

Post projects exports of Chilean cherries to grow significantly in the coming years, driven by strong international demand, particularly from China. In MY 2025/26 exports are expected to grow by 7.2 percent to 670,000 MT, driven by strong international demand, particularly from China. This projection assumes the absence of unexpected shocks to the cherry production and export industry.

In MY 2024/25 (data until May), Chilean cherry exports reached 625,208 MT, representing a 51.1 percent increase compared to the previous year and a record in export volume (Table 3). This significant growth is attributed to increased production volumes from increasing area planted and from newly planted orchards becoming productive. However, the record volumes came at a cost. With most shipments arriving in a short period, market oversupply pushed prices down sharply. At the same time, industry critics noted inconsistent quality in some consignments, affecting Chile's premium reputation among Chinese buyers.

As a result, some growers saw lower profits despite the higher total volume. Looking ahead, Chilean exporters are taking a cautious stance for the next season, focusing on maintaining top-quality standards and targeting a broader range of Chinese cities, including emerging markets beyond the major coastal hubs.

In MY 2023/24, Chile exported 413,673 MT of cherries, a slight decrease of 0.2 percent compared to MY 2022/23. However, despite the minor decline in export volume, the export value increased by 11.4 percent, reaching $2.45 billion (Table 4). This increase in value reflects high prices for Chilean cherries in the Chinese market, which remains the dominant destination for Chilean cherry exports.

China remains the dominant destination for Chilean cherries, with exports forecasted to reach 567,625 MT in MY 2024/25, accounting for approximately 90.8 percent of total exports. The United States is the second-largest market, with exports reaching 20,166 MT and representing 3.2 percent of total exports. Other markets, such as South Korea, Taiwan, and Vietnam showed strong growth, with export volumes increasing by 75.5 percent, 45.1 percent, and 118.2 percent, respectively, compared to MY 2023/24.

Despite efforts to diversify export markets, Chilean exporters continue to rely heavily on China due to its high demand and premium prices. However, the industry is actively working to expand into other markets to reduce dependency on China and ensure long-term sustainability.

The consistent growth in export volumes has placed pressure on Chilean producers and exporters to optimize harvest and packing processes. These stages are critical for ensuring high-quality cherries that can withstand long-distance transport to international markets. Cherry harvest and packing require careful handling to prevent damage from physical manipulation or exposure to high temperatures. Automation in packing has become essential to minimize fruit damage, and producers are working to complete these processes efficiently to maintain quality.

Maintaining high-quality standards is a growing challenge for the Chilean cherry industry as production volumes continue to rise. Exporters and producers are collaborating to ensure quality consistency, which is vital for sustaining high prices in competitive markets like China.

Table 3: Chile Exports to the World by Volume (MT)

Commodity: 080921,080929, Sour Cherries (Prunus Cerasus), Fresh/Cherries, Fresh, Other Than Sour						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Nov 2023 - May 2024 (MT)	Nov 2024 - May 2025 (MT)	Variation (%)
The World	414,598	413,673	-0.2%	413,661	625,208	51.1%
China	362,856	375,636	3.5%	375,635	567,625	51.1%
United States	18,161	14,335	-21.1%	14,335	20,166	40.7%
Taiwan	6,401	3,981	-37.8%	3,981	5,778	45.1%
Brazil	3,898	3,699	-5.1%	3,698	4,193	13.4%
South Korea	6,450	3,552	-44.9%	3,552	6,233	75.5%
United Kingdom	2,476	2,214	-10.6%	2,214	3,096	39.8%
Ecuador	2,835	2,155	-24.0%	2,155	2,606	20.9%
Vietnam	1,400	1,366	-2.4%	1,366	2,981	118.2%
Thailand	1,735	1,262	-27.3%	1,262	2,118	67.8%
Hong Kong	1,482	932	-37.1%	932	879	-5.7%
Spain	981	876	-10.7%	876	1,677	91.4%
Canada	959	543	-43.4%	543	1,278	135.4%
Bolivia	648	521	-19.6%	521	329	-36.9%
India	419	441	5.3%	441	760	72.3%
Netherlands	761	428	-43.8%	428	1,501	250.7%
Others	3,136	1,732	-44.8%	1,722	3,988	131.6%

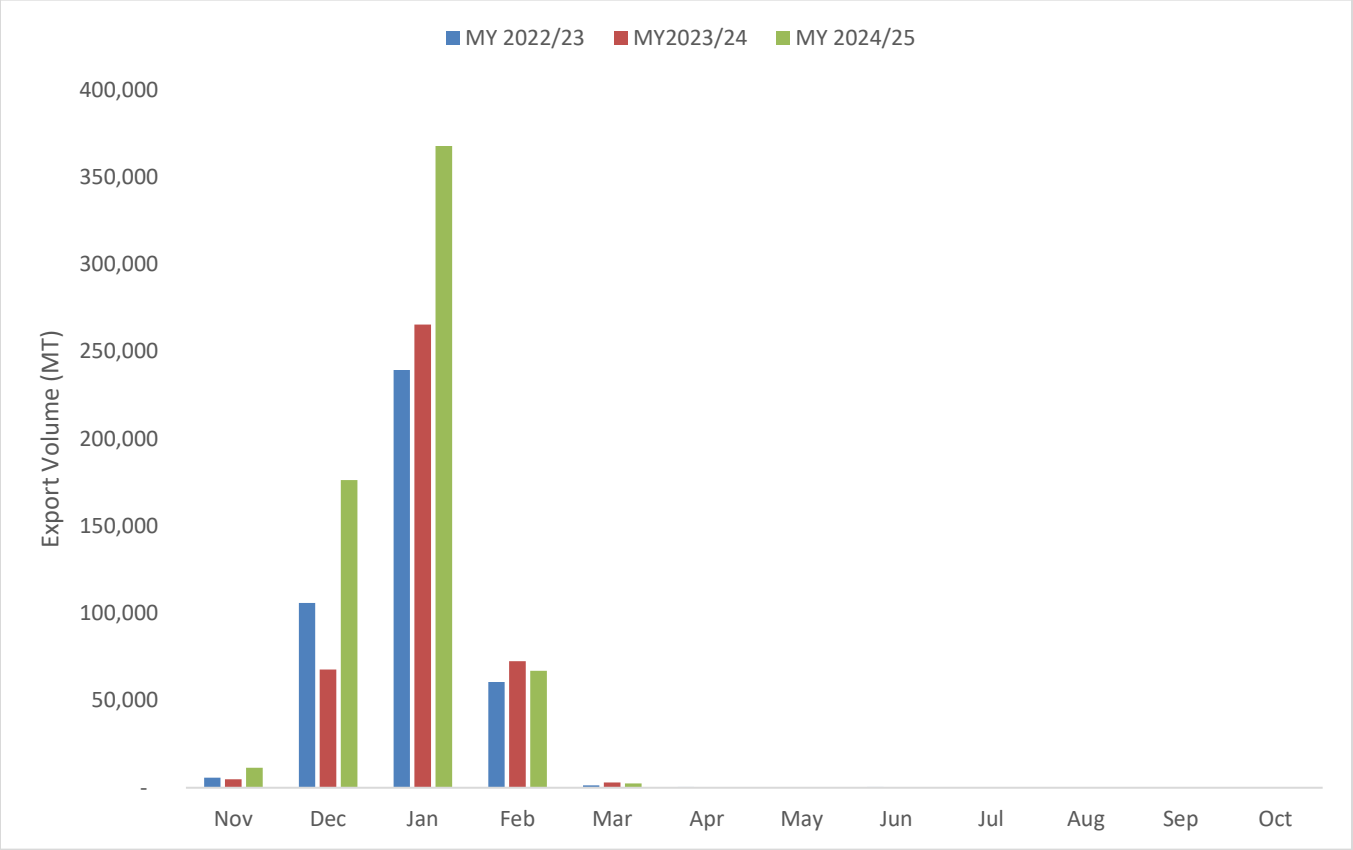
Source: Trade Data Monitor, LLC.

Table 4: Chile Exports to the World by Value (Million USD)

Commodity: 080921,080929, Sour Cherries (Prunus Cerasus), Fresh/Cherries, Fresh, Other Than Sour						
Partner Country	**Marketing Year**			**Year to Date**		
	MY 2022/23 (USD)	**MY 2023/24 (USD)**	**Variation (%)**	**Nov 2023 - May 2024 (USD)**	**Nov 2024 - May 2025 (USD)**	**Variation (%)**
The World	2,197,558,711	2,448,357,738	11.4%	2,448,291,248	3,372,897,425	37.8%
China	1,957,252,457	2,246,507,662	14.8%	2,246,468,262	3,079,278,921	37.1%
United States	84,822,615	73,289,600	-13.6%	73,289,600	98,921,279	35.0%
South Korea	34,449,011	23,660,448	-31.3%	23,660,448	41,463,792	75.2%
Taiwan	33,928,135	21,647,396	-36.2%	21,647,396	30,926,920	42.9%
Brazil	12,543,473	17,760,844	41.6%	17,755,594	16,253,605	-8.5%
United Kingdom	9,903,245	13,330,592	34.6%	13,330,592	14,587,759	9.4%
Thailand	11,156,727	8,908,079	-20.2%	8,908,079	13,107,237	47.1%
Vietnam	7,732,855	7,454,094	-3.6%	7,454,094	16,147,393	116.6%
Hong Kong	8,497,744	5,666,349	-33.3%	5,666,349	5,165,648	-8.8%
Spain	5,146,052	5,377,792	4.5%	5,377,792	9,136,342	69.9%
Ecuador	4,749,226	4,593,781	-3.3%	4,593,781	5,400,899	17.6%
Canada	4,968,516	3,258,664	-34.4%	3,258,664	7,130,900	118.8%
India	2,803,427	2,823,954	0.7%	2,823,954	4,857,727	72.0%
Netherlands	4,121,912	2,652,347	-35.7%	2,652,347	9,129,655	244.2%
Mexico	2,745,530	2,100,218	-23.5%	2,100,218	5,776,686	175.1%
Others	12,737,786	9,325,918	-26.8%	9,304,078	15,612,662	67.8%

Source: Trade Data Monitor, LLC.

Figure 3: Cherry Export Volume by Month (MT)



Source: Trade Data Monitor, LLC.

Consumption:

In MY 2025/26, domestic consumption is projected to rise modestly to 60,000 MT, reflecting stable local demand. This increase in domestic consumption follows the increase in production and, thus, in the overall supply and availability of cherries. Chile's cherry industry remains export-oriented, with the majority of production destined for foreign markets. Domestic consumption consists mostly of cherries that do not comply with the quality features for exports. Most of the domestic cherry consumption is fresh and very few companies are processing to produce canned cherries or confectionery products.

Policy:

No policy updates to report.

Commodities:
Fresh Peaches & Nectarines

Table 5: Production, Supply and Distribution Data Statistics

Peaches & Nectarines, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Nov 2023		Nov 2024		Nov 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	8500	8500	8550	9196	0	9500
Area Harvested (HA)	8000	8000	8050	8600	0	8900
Bearing Trees (1000 TREES)	6500	6500	6550	7000	0	7300
Non-Bearing Trees (1000 TREES)	710	710	720	720	0	750
Total Trees (1000 TREES)	7210	7210	7270	7720	0	8050
Commercial Production (MT)	172000	172000	173000	198180	0	205000
Non-Comm. Production (MT)	1000	1000	1000	1000	0	1000
Production (MT)	173000	173000	174000	199180	0	206000
Imports (MT)	40	40	50	50	0	50
Total Supply (MT)	173040	173040	174050	199230	0	206050
Domestic Consumption (MT)	58040	58040	58050	58050	0	60050
Exports (MT)	115000	115000	116000	141180	0	146000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	173040	173040	174050	199230	0	206050
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates
Note: data does not include canned peaches

Production:

In MY 2025/26, Post estimates the area planted for fresh peaches and nectarines in Chile will reach 9,500 hectares, representing a 3.3 percent increase compared to MY 2024/25. This growth reflects the continued expansion of nectarine area planted, which offsets the decline in fresh peach area planted observed in previous years.

Post estimates that commercial production of fresh peaches and nectarines will total 205,000 MT in MY 2025/26, a 3.4 percent increase compared to MY 2024/25. These projections assume regular yields and favorable climatic conditions, with no unexpected disruptions to production.

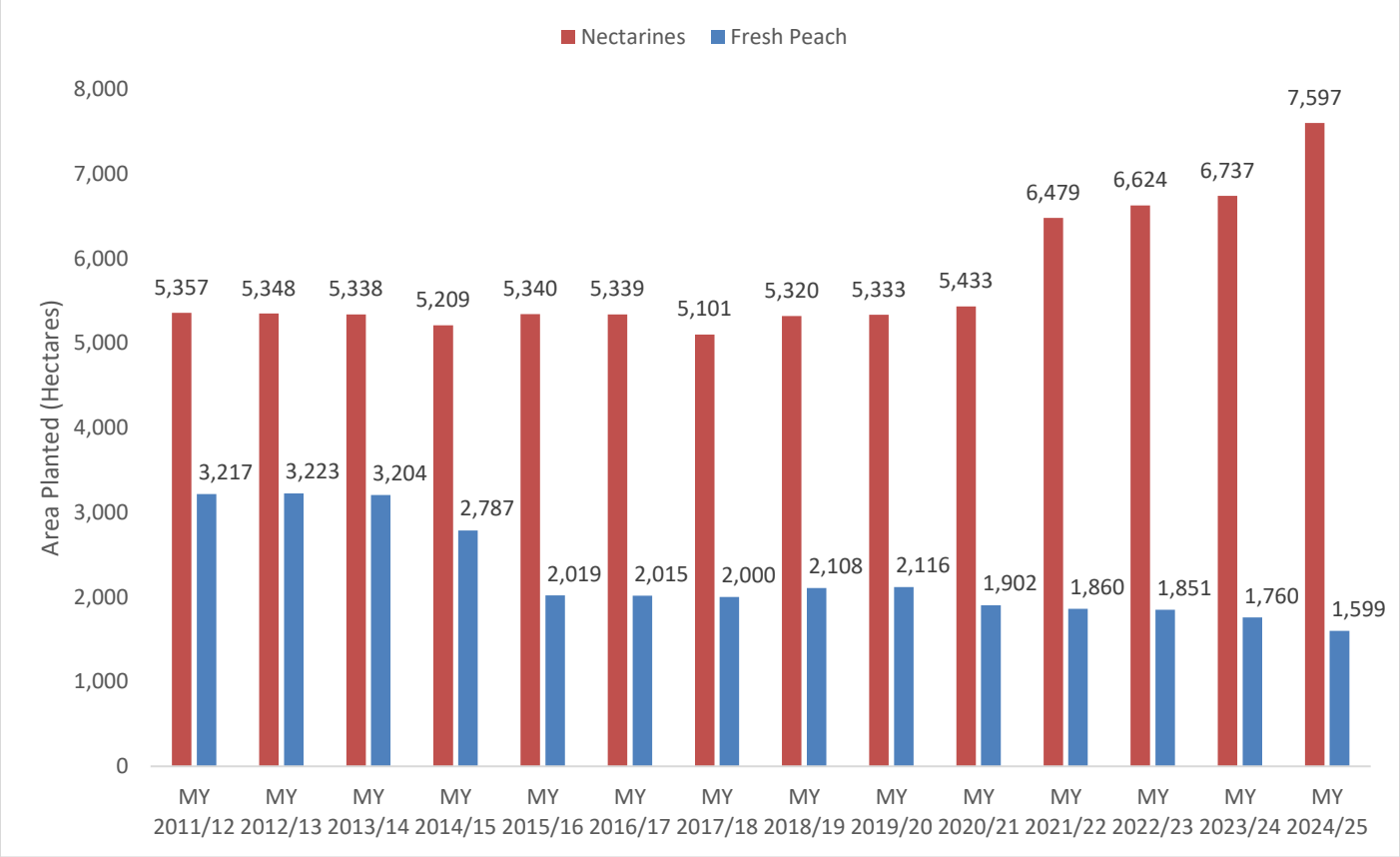
Nectarine production for exports remains highly profitable for Chilean fruit producers, driving significant growth in nectarine area planted. As a result, the area planted with nectarines grew from 5,101 ha in MY 2017/18 to 7,597 ha in MY 2024/25. The *O'Higgin*s region, which accounts for 75 percent of total nectarine area planted, experienced a 16.4 percent increase in planted area in a three-year period. Similarly, the *Metropolitana* region, which represents 17.7 percent of nectarine area planted, saw an 11.4 percent increase. These regions, located in the central part of Chile, continue to be the primary areas for nectarine production due to their favorable climatic conditions and proximity to export infrastructure.

Conversely, the area planted with fresh peaches has steadily declined over the past decade, falling below 2,000 ha since MY 2020/21. By MY 2024/25, fresh peach area planted totaled 1,599 ha, reflecting a 13.6 percent decrease over the past three years (Table 7). This decline is attributed to the lower profit

margins of fresh peaches compared to other stone fruits, such as nectarines and cherries, prompting producers to shift their orchards to more lucrative crops.

The *O'Higgins* region remains the primary location for fresh peach production, accounting for 52.7 percent of the total fresh peach area planted in Chile. However, the region experienced a 17.7 percent decrease in area planted over the past three years. The *Metropolitan*a region, which holds 30.5 percent of fresh peach area planted, also saw a 12.5 percent decline. *Valparaíso*, representing 13 percent of fresh peach area planted, experienced a 9.7 percent decrease (Table 6).

Figure 4: Peach and Nectarine Area Planted (Hectares)



Source: based in ODEPA, 2025
Note: data does not include canned peaches

Table 6: Nectarine Area Planted by Region (Hectares)

Region	Planted Area (ha)	Three-Year Variation (%)	Share (%)
O'Higgins	5,694	16.4%	75.0%
Metropolitana	1,347	11.4%	17.7%
Valparaíso	271.03	-8.3%	3.6%
Others	284		3.7%
Total	**7,597**	**14.7%**	**100.0%**

Source: ODEPA, 2025

Table 7: Fresh Peach Area Planted by Region (Hectares)

Region	Area Planted (ha)	Three-Year Variation (%)	Share (%)
O'Higgins	843.39	-17.7%	52.7%
Metropolitana	487.08	-12.5%	30.5%
Valparaíso	208.45	-9.7%	13.0%
Others	60		3.8%
Total	**1,599**	**-13.6%**	**100.0%**

Source: ODEPA, 2025

Map 2: Peach and Nectarine Production Regions in Chile.

Source: Google Earth

Consumption:

Domestic consumption is projected to increase to 60,050 MT in MY 2025/26. This represents a 3.4 percent increase compared to MY 2024/25. Domestic consumption of fresh nectarines and peaches remains relatively steady since it is a well-known product that is regularly consumed during the harvest season, between December and February, in Chile. Domestic consumption of peaches includes both fresh consumption and processing and represents around 29 percent of production.

Processing includes peaches and nectarines that are not apt for fresh exports and that are used for juice, desserts, and other processed products. However, there are specific varieties used specifically for canned peaches such as Pomona, Andros, Fortuna, which are not included in these estimates.

Trade:

In MY 2025/26, Chile's fresh peach and nectarine exports are forecasted to reach 146,000 MT, a 3.4 percent increase over MY 2024/25. This growth is driven by higher production volumes and strong international demand for Chilean nectarines, which are increasingly preferred in export markets due to their quality and flavor profile.

From November 2024 to May 2025, Chilean exports of fresh peaches and nectarines experienced significant growth, reaching 141,180 MT in volume, or a 22.7 percent increase compared to the same period in MY 2023/24 (Table 8). Export value during this period rose to $198.2 million, reflecting a 13.2 percent increase (Table 9).

China remained the dominant market for Chilean nectarines, with exports totaling 56,978 MT during this period, a 23.3 percent increase compared to November 2023–May 2024. Export value to China grew to $74.4 million, a 7.7 percent increase. The United States saw a significant rebound in export volumes, with shipments increasing by 26.2 percent, reaching 36,578 MT. Export value to the U.S. rose by 22.3 percent, totaling $49.7 million.

Table 8: Chile Exports to The World by Volume

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Nov 2023 - May 2024 (MT)	Nov 2024 - May 2025 (MT)	Variation (%)
The World	103,952	115,031	10.7%	115,031	141,180	22.7%
China	34,658	46,198	33.3%	46,198	56,978	23.3%
United States	32,466	28,983	-10.7%	28,983	36,578	26.2%
Mexico	10,416	10,870	4.4%	10,870	12,033	10.7%
Brazil	5,662	6,128	8.2%	6,128	6,692	9.2%
Taiwan	5,283	5,284	0.0%	5,284	6,136	16.1%
Netherlands	3,298	4,669	41.6%	4,669	5,293	13.4%
Peru	1,758	2,141	21.8%	2,141	1,286	-39.9%
Canada	2,102	1,926	-8.4%	1,926	3,373	75.1%
Russia	1,078	1,771	64.3%	1,771	1,808	2.1%
Guatemala	879	935	6.4%	935	1148	22.8%
Spain	632	853	35.0%	853	2029	137.9%
Colombia	585	688	17.6%	688	549	-20.2%
Ecuador	909	683	-24.9%	683	973	42.5%
United Kingdom	464	580	25.0%	580	1702	193.4%
Germany	248	423	70.6%	423	586	38.5%
Others	3,514	2,899	-17.5%	2,899	4,016	38.5%

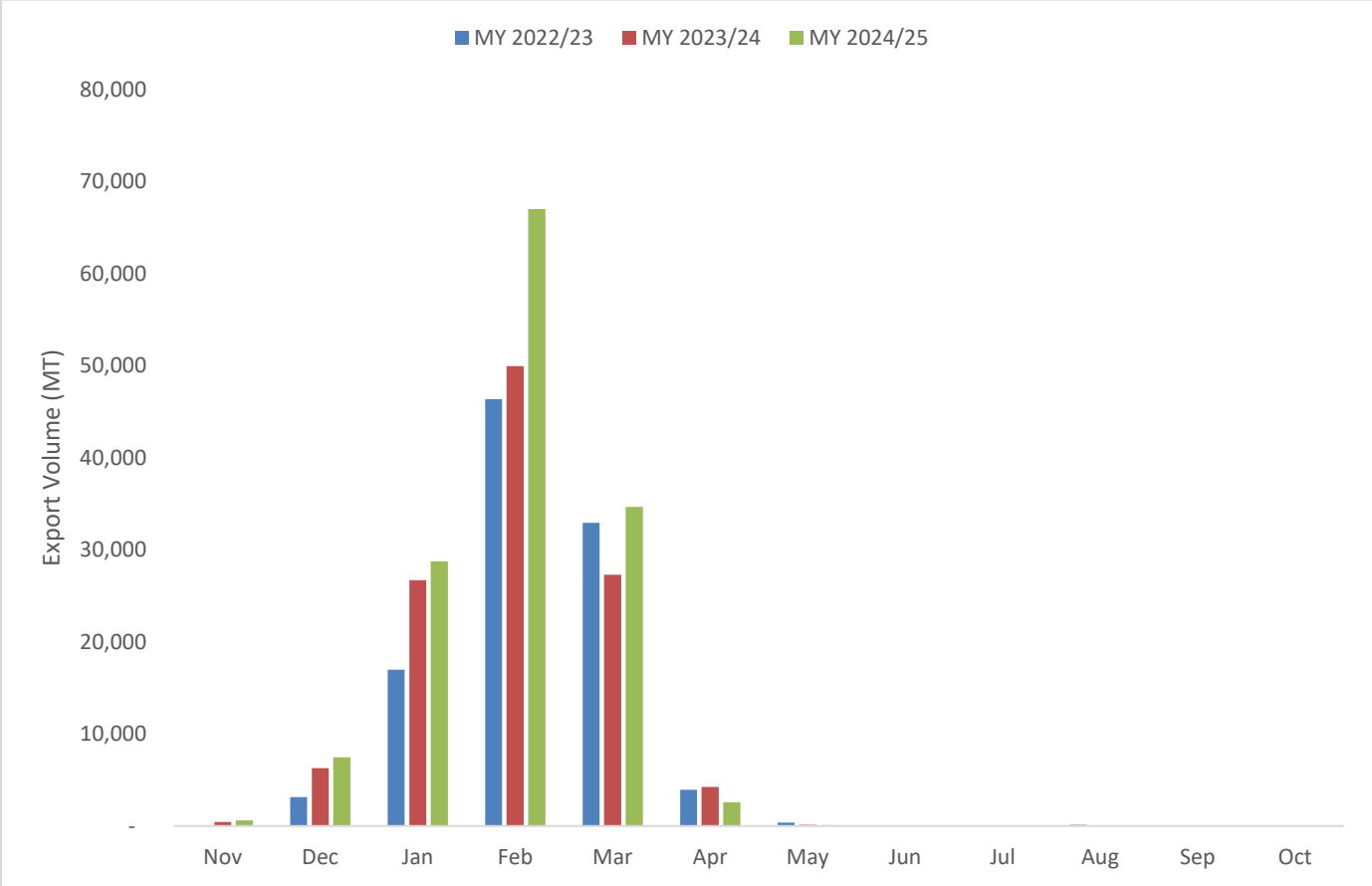
Source: Trade Data Monitor, LLC.
Note: Data does not include canned peaches

Table 9: Chile Exports to the World by Value (USD)

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (USD)	MY 2023/24 (USD)	Variation (%)	Nov 2023 - May 2024 (USD)	Nov 2024 - May 2025 (USD)	Variation (%)
The World	136,135,144	175,024,165	28.6%	175,024,165	198,176,149	13.2%
China	47,994,824	69,047,131	43.9%	69,047,131	74,379,020	7.7%
United States	37,583,029	40,649,670	8.2%	40,649,670	49,724,717	22.3%
Mexico	14,904,858	21,143,945	41.9%	21,143,945	23,556,007	11.4%
Taiwan	7,360,224	8,896,294	20.9%	8,896,294	9,171,434	3.1%
Brazil	6,451,834	7,870,995	22.0%	7,870,995	7,349,582	-6.6%
Netherlands	4,691,969	7,075,236	50.8%	7,075,236	7,925,136	12.0%
Canada	3,465,872	3,685,730	6.3%	3,685,730	6,045,803	64.0%
Russia	1,629,781	2,664,160	63.5%	2,664,160	2,566,560	-3.7%
Peru	1,967,082	2,427,413	23.4%	2,427,413	1,593,862	-34.3%
Guatemala	1,573,406	1,659,879	5.5%	1,659,879	1,803,359	8.6%
Spain	835,827	1,226,742	46.8%	1,226,742	3,348,293	172.9%
Colombia	756,338	1,060,786	40.3%	1,060,786	868,318	-18.1%
Ecuador	1,086,421	950,434	-12.5%	950,434	1,092,313	14.9%
Honduras	116,128	882,617	660.0%	882,617	186,708	-78.8%
United Kingdom	669,946	864,204	29.0%	864,204	2,332,255	169.9%
Others	5,047,605	4,918,929	-2.5%	4,918,929	6,232,782	26.7%

Source: Trade Data Monitor, LLC.
Note: Data does not include canned peaches.

Figure 5: Fresh Peach and Nectarine Monthly Export Volume (MT)



Source: Trade Data Monitor, LLC.

Policy:

No policy updates to report.

Attachments:

No Attachments