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Report Name: Stone Fruit Annual

Country: Chile

Post: Santiago

Report Category: Stone Fruit

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Report Highlights:

Following a temporary nine percent decline in Chilean cherry exports in MY 2025/2026, Post estimates that exports will rebound. In MY 2026/2027, cherry production is projected to reach a record of 727,000 MT, and exports, fueled by trade with China, are expected to reach 667,000 MT. . Also in MY 2026/2027, Post estimates that fresh peach and nectarine production will reach 209,063 MT, a six percent increase over the previous marketing year, with exports projected at 147,000 MT, up 8.6 percent from the previous period. This growth in production reflects the continued expansion of the nectarine sector, outpacing industry movement away from peach production.

Commodity:

Fresh Cherries, (Sweet & Sour)

Table 1: Production, Supply and Distribution Data Statistics

Cherries (Sweet&Sour), Fresh Market Year Begins Chile	2024/2025		2025/2026		2026/2027	
	Nov 2024		Nov 2025		Nov 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	76400	0	80000	77766	0	80000
Area Harvested (HA)	71000	0	74000	74000	0	76000
Bearing Trees (1000 TREES)	45800	0	48000	48000	0	49600
Non-Bearing Trees (1000 TREES)	2000	0	2000	2000	0	2000
Total Trees (1000 TREES)	47800	0	50000	50000	0	51600
Commercial Production (MT)	682000	0	728000	629492	0	725000
Non-Comm. Production (MT)	2200	0	2000	2000	0	2000
Production (MT)	684200	0	730000	631492	0	727000
Imports (MT)	0	0	0	0	0	0
Total Supply (MT)	684200	0	730000	631492	0	727000
Domestic Consumption (MT)	58200	0	60000	62000	0	60000
Exports (MT)	626000	0	670000	569492	0	667000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	684200	0	730000	631492	0	727000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

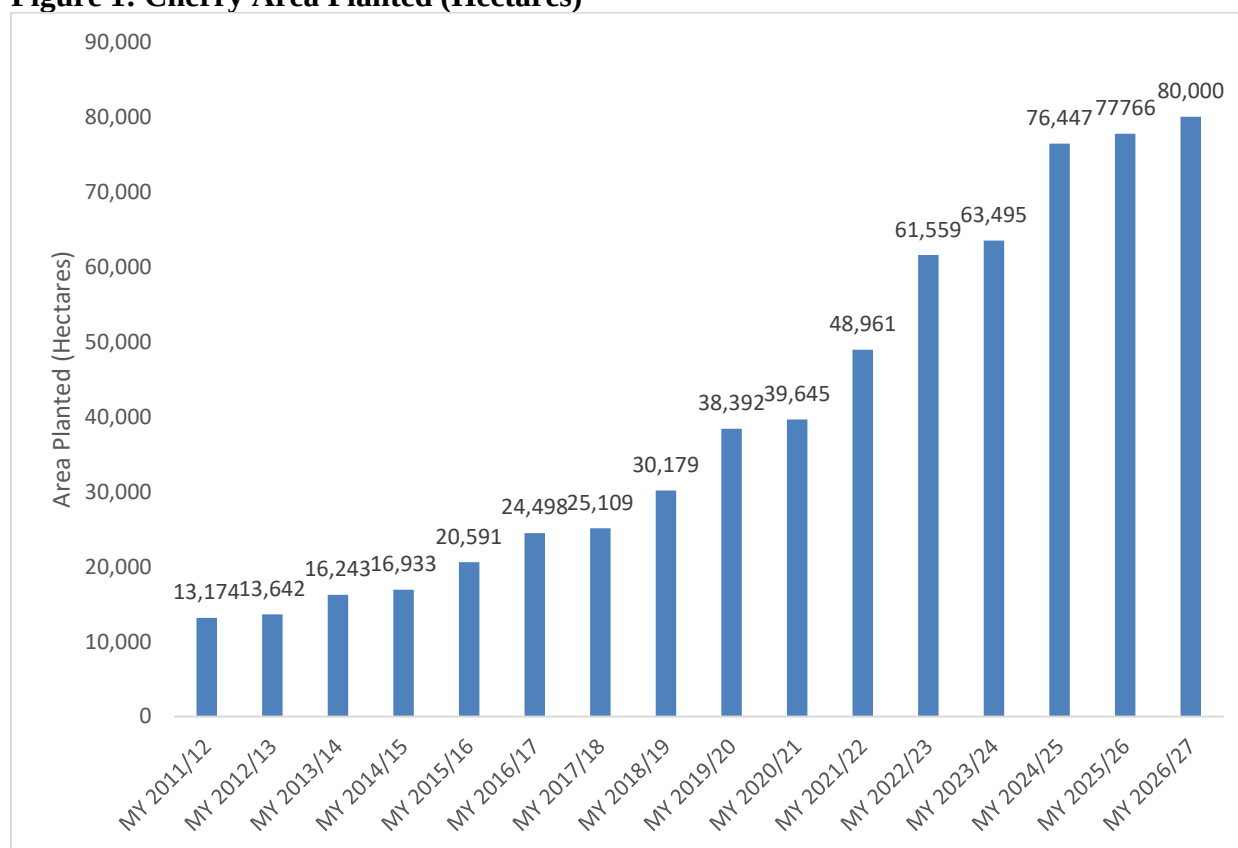
Production:

Cherries are the largest fruit crop in Chile by planted area. In MY 2026/2027, Post projects that cherry planted area will reach 80,000 hectares (ha) based on industry sources. This projection reflects an increase from the planted area of 77,766 in 2025/2026, as published in the latest ODEPA-CIREN Fruit Tree Survey (published in 2026). Post sources indicate that while expansion continues, new plantings have drastically slowed as the industry shifts its focus toward productivity and variety renewal and away from adding new hectares.

Post estimates area harvested at 76,000 ha, reflecting the maturity of previously planted orchards. Cherry production typically begins four to five years after planting, and the increase in harvested area aligns with the growth in planted area observed in prior years.

Chilean cherry production volumes are expected to reach 727,000 MT in 2026/2027, a 16 percent increase over MY 2025/2026. This growth is attributed to the incorporation of new productive orchards and assuming regular climatic conditions.

Figure 1: Cherry Area Planted (Hectares)



Source: based in ODEPA, 2026

* Post estimation

According to the 2025 ODEPA-CIREN Fruit Tree Survey, published in 2026, the Maule region remains Chile's leading cherry-producing region, with 32,801 hectares planted, representing 42.2 percent of the national cherry area (Table 2). The O'Higgins region follows with 29,935 hectares, accounting for 38.5 percent of the total. Together, these two regions represent more than 80 percent of Chile's cherry acreage, benefiting from favorable agroclimatic conditions, including adequate winter chill accumulation, irrigation availability, and relatively low spring frost risk.

To reduce weather-related losses, many producers use plastic rooftops to protect orchards from rainfall during critical periods such as flowering and harvesting. These protective systems have become standard in many commercial orchards, particularly in central Chile, where rainfall can significantly reduce fruit quality and exportability.

The leading cherry varieties in Chile remain Santina, Lapins, and Regina. Santina continues to be the preferred variety for many new orchards due to its early harvest, high productivity, and excellent post-harvest performance for long-distance exports, particularly to China. At the same time, producers are increasingly planting newer varieties such as Sweet Aryana, Nimba, Pacific Red, Areko, Sweet Lorenz, and Sweet Gabriel, which offer earlier harvest windows, higher productivity, improved fruit firmness,

and better shipping quality. This varietal renewal reflects the industry's strategy to improve quality and orchard efficiency, extend the export season, and maximize returns in premium markets.

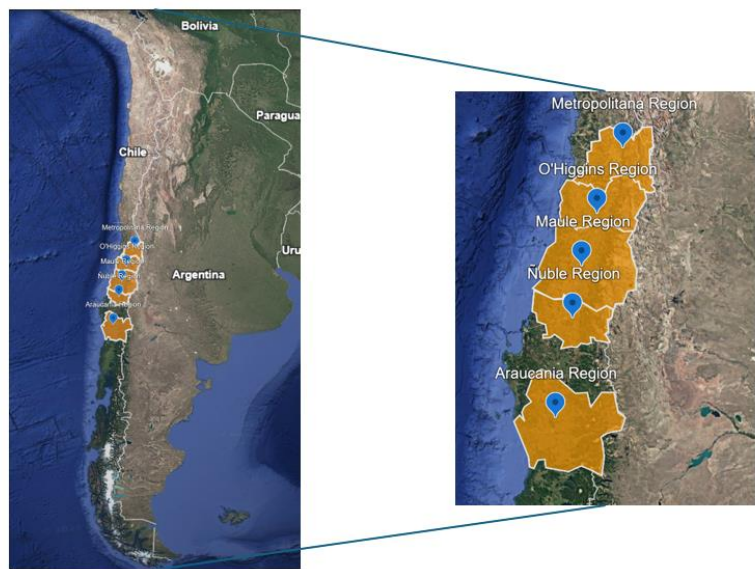
Table 2: Cherry Area Planted by Region (Hectares)

Region	Area Planted (ha)	Three-Year Variation (%)	Share (%)
Maule	32,801	17.9%	42.2%
O'Higgins	29,935	30.3%	38.5%
Metropolitana	5,430	47.5%	7.0%
Ñuble	3,062	3.0%	3.9%
La Araucanía	1,859	13.7%	2.4%
Others	4,679	-	6.0%
Total	77,766	-	100.0%

Source: ODEPA, 2025

¹ Three-year variation corresponds to the latest three-year comparison available in the respective regional fruit survey and therefore does not represent a uniform 2022–2025 comparison across all regions.

Map 1: Cherry Production Regions in Chile.



Source: Google Earth

Trade:

Post expects Chilean cherry exports to rebound to historically high levels in the coming years, and will reach 667,000 MT in MY 2026/2027, supported by continued international demand, particularly from China. The increase is also expected to result from additional production from orchards planted between 2021 and 2023 reaching higher productivity levels, improved orchard management, and continued adoption of higher-performing varieties. However, growth is expected to remain moderate due to market absorption capacity, logistics constraints during the peak export period, and the need to improve quality

standards in China. Export growth will also remain moderate due to industry shifts from rapid expansion toward greater focus on productivity, quality, and market diversification.

In MY 2025/26, Chilean cherry exports declined to approximately 569,492 metric tons (MT), representing an estimated nine percent decrease compared with the previous season. The decline reflects a normalization of production after the exceptional MY 2024/25 crop rather than a reduction in productive capacity. Lower export volumes were mainly associated with more typical production conditions, including climatic variability during key crop development stages. In addition, the concentration of large volumes arriving in China within a short period created logistical and commercial challenges, affecting market conditions and producer profits.

In MY 2024/25, Chile exported 625,208 MT of cherries, representing a 51.1 percent increase compared with the previous season and a historical export record. Growth was driven by increased production from expanded planted areas and young orchards entering commercial production. However, the large volume placed pressure on prices in China and highlighted the importance of maintaining consistent fruit quality, particularly in size, firmness, and post-harvest condition. Following these challenges, exporters have increased their focus on quality management, shipment timing, and market diversification.

Market Diversification

China remains the dominant destination for Chilean cherries, accounting for approximately 87 percent of total exports in MY 2025/26. Chile exported an estimated 494,332 MT to China during this season, confirming the market's central role in the industry. While exporters continue efforts to expand sales to markets such as the United States, South Korea, Taiwan, Vietnam, and India, China's strong consumer demand, established distribution channels, and importance during the Lunar New Year season will continue to influence overall export performance.

Chile is pursuing a diversification strategy for cherry exports by expanding sales beyond major Chinese cities and retailers, strengthening food-safety messaging, and developing new logistics channels such as air shipments to Vietnam. In the United States, Chile is testing sales through Walmart's 2,000 stores and participating in ProChile promotions, while also exploring express vessels to improve shipping times to the United States, the European Union, and ASEAN markets.

The continued growth in production has increased the importance of efficient harvesting, packing, and logistics operations. Investment in automated packing systems, improved cold-chain management, and post-harvest technologies remains critical to maintaining fruit quality during long-distance transportation, particularly to Asian markets.

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 2023/24 (MT)	MY 2024/25 (MT)	Variation (%)	Nov 2024 - May 2025 (MT)	Nov 2025 – May 2026 (MT)	Variation (%)
The World	413,673	625,208	51.1 %	625,208	569,492	-8.9 %
China	375,636	567,625	51.1 %	567,625	494,322	-12.9 %
United States	14,335	20,166	40.7 %	20,166	25,656	27.2 %
Taiwan	3,981	5,778	45.1 %	5,778	10,652	84.4 %
South Korea	3,552	6,233	75.5 %	6,233	7,057	13.2 %
Brazil	3,699	4,193	13.4 %	4,193	5,599	33.5 %
Ecuador	2,155	2,606	20.9 %	2,606	3,777	44.9 %
United Kingdom	2,214	3,096	39.8 %	3,096	3,248	4.9 %
Vietnam	1,366	2,981	118.2 %	2,981	2,883	-3.3 %
Spain	932	2,118	127.3 %	2,118	2,296	8.4 %
Thailand	1,262	879	-30.3 %	879	2,106	139.6 %
Others	4,541	1,722	-62.1 %	1,722	10,012	481.4 %

Source: Trade Data Monitor, LLC.

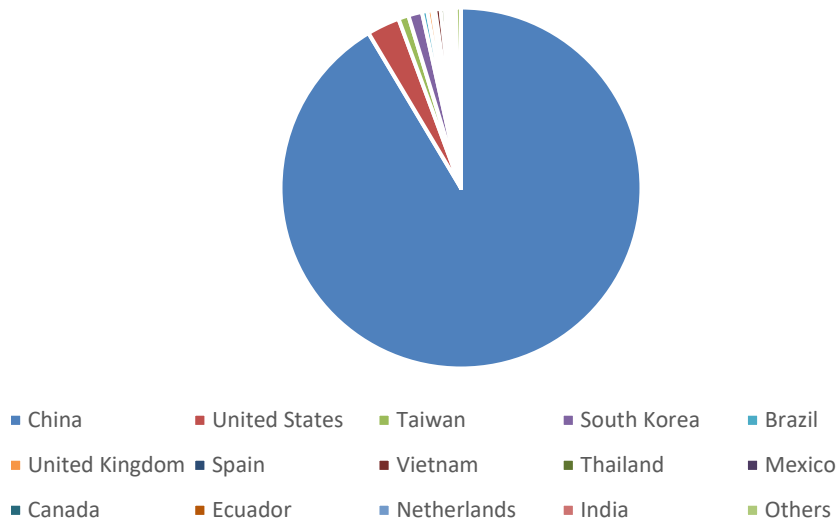
Table 4: Chile Exports to the World by Value (USD)

Commodity: 080921,080929, Sour Cherries (Prunus Cerasus), Fresh/Cherries, Fresh, Other Than Sour						
Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (USD)	MY 2024/25 (USD)	Variation (%)	Nov 2024 - May 2025 (USD)	Nov 2025 – May 2026	Variation (%)
The World	2,448,357,738	3,372,897,425	37.8 %	3,372,897,425	2,559,980,804	-24.1 %
China	2,246,507,662	3,079,278,921	37.1 %	3,079,278,921	2,219,933,658	-27.9 %
United States	73,289,600	98,921,279	35.0 %	98,921,279	108,337,744	9.5 %
Taiwan	21,647,396	30,926,920	42.9 %	30,926,920	53,453,022	72.8 %
South Korea	23,660,448	41,463,792	75.2 %	41,463,792	35,427,764	-14.6 %
Brazil	17,760,844	16,253,605	-8.5 %	16,253,605	21,243,918	30.7 %
United Kingdom	13,330,592	14,587,759	9.4 %	14,587,759	15,425,995	5.7 %
Spain	5,377,792	9,136,342	69.9 %	9,136,342	14,686,512	60.7 %
Vietnam	7,454,094	16,147,393	116.6 %	16,147,393	13,401,380	-17.0 %
Thailand	8,908,079	13,107,237	47.1 %	13,107,237	12,945,691	-1.2 %
Mexico	2,100,218	5,776,686	175.1 %	5,776,686	9,156,381	58.5 %
Canada	3,258,664	7,130,900	118.8 %	7,130,900	8,371,188	17.4 %
Ecuador	4,593,781	5,400,899	17.6 %	5,400,899	8,114,338	50.2 %
Netherlands	2,652,347	9,129,655	244.2 %	9,129,655	7,259,970	-20.5 %
India	2,823,954	4,857,727	72.0 %	4,857,727	4,767,655	-1.9 %
Others	9,325,918	15,612,662	67.4 %	15,612,662	27,455,588	75.9 %

Source: Trade Data Monitor, LLC.

Chilean Cherry Exports by Value (USD)

Nov 2024- May 2025



Chile is working to diversify markets, but China remains the overwhelmingly predominant destination for Chilean cherries.

Chilean Cherry Exports by Value (USD)

Nov 2025- May 2026

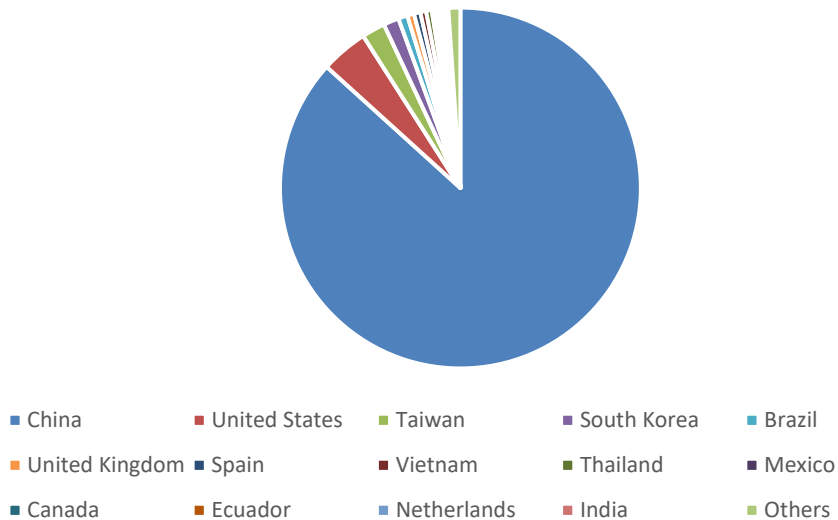
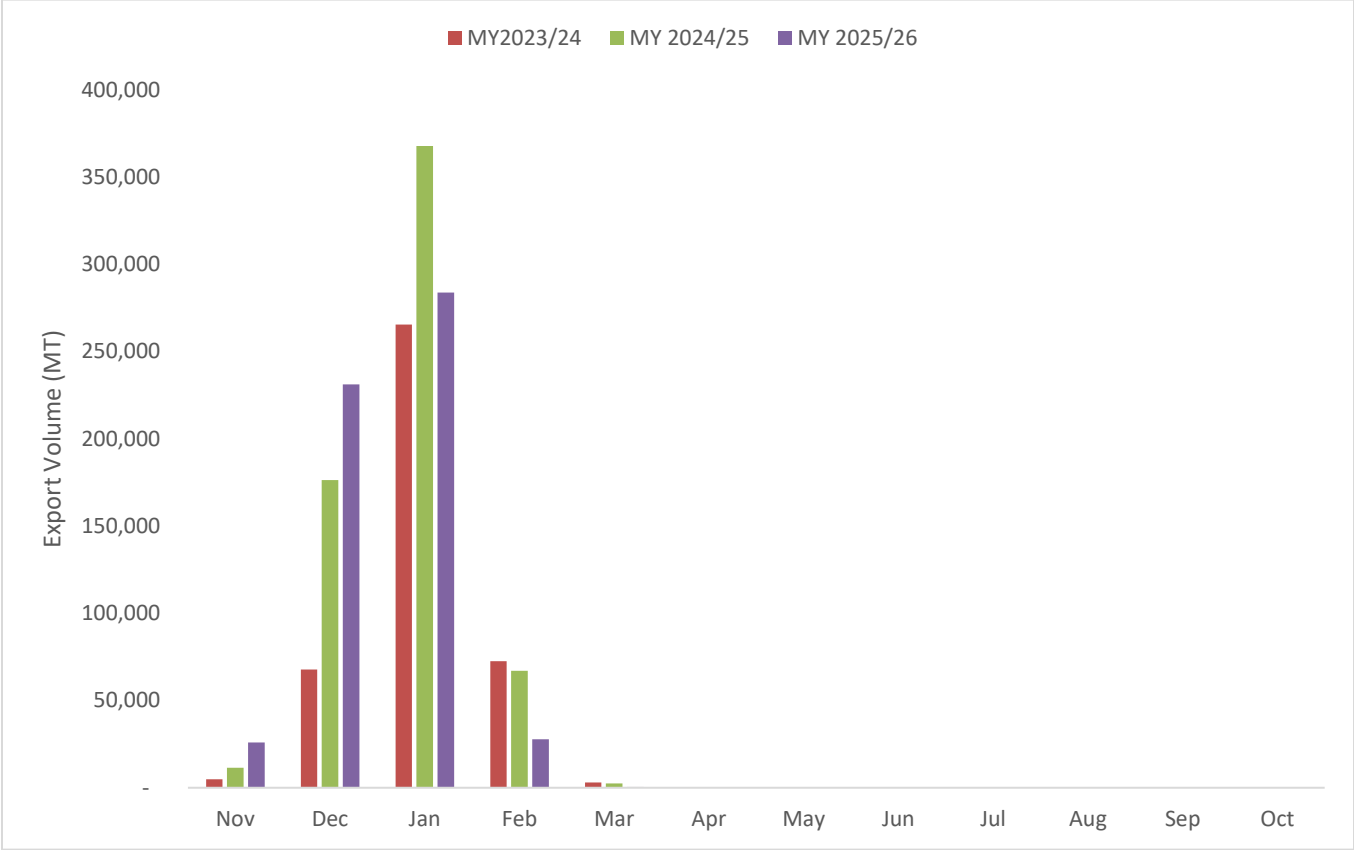


Figure 3: Cherry Export Volume by Month (MT)



Source: Trade Data Monitor, LLC.

Consumption:

In MY 2026/27, domestic cherry consumption is estimated at approximately 60,000 MT, representing around 8.2 percent of total production. Chile’s cherry industry remains strongly export-oriented, with approximately 90 percent of production shipped to international markets. Domestic consumption is mainly composed of fruit that does not meet export quality standards due to size, firmness, or appearance. Fresh consumption accounts for most domestic demand, while processing remains limited. Despite increased production availability, domestic demand is expected to grow only marginally due to the relatively small size of the local market and established consumption patterns.

Policy:

No policy updates to report.

Commodities:

Fresh Peaches & Nectarines

Table 5: Production, Supply and Distribution Data Statistics

Peaches & Nectarines, Fresh Market Year Begins Chile	2024/2025		2025/2026		2026/2027	
	Nov 2024		Nov 2025		Nov 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	9200	9196	9500	9536	0	9536
Area Harvested (HA)	8600	8600	8900	8900	0	8900
Bearing Trees (1000 TREES)	7000	7000	7300	7300	0	7300
Non-Bearing Trees (1000 TREES)	720	720	750	750	0	750
Total Trees (1000 TREES)	7720	7720	8050	8050	0	8050
Commercial Production (MT)	198180	198180	205000	196094	0	208000
Non-Comm. Production (MT)	1000	1000	1000	1000	0	1000
Production (MT)	199180	199180	206000	197094	0	209000
Imports (MT)	100	50	100	63	0	63
Total Supply (MT)	199280	199230	206100	197157	0	209063
Domestic Consumption (MT)	57980	58050	60100	60050	0	60050
Exports (MT)	141300	141180	146000	137107	0	149013
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	199280	199230	206100	197157	0	209063
(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 2026/27, Post estimates the area planted with fresh nectarines and peaches in Chile will reach a combined 9,536 hectares, reflecting an increase of 2.5 percent in nectarines and a decrease of three percent in peaches. While the availability of suitable land for new stone-fruit plantings remains limited in Chile's main production regions, the slight increase in nectarine area is primarily driven by the continuous conversion of peaches to nectarines for their better commercial and exports prospects. Post estimates commercial production of fresh peaches and nectarines to reach 208,000 MT in MY 2026/27, up 4.9 percent from the 198,107 MT reached MY 2025/26. This increase is due to the development of previously planted hectares that have now become productive. . The forecast assumes normal yields and favorable climatic conditions, with no unexpected disruptions to production.

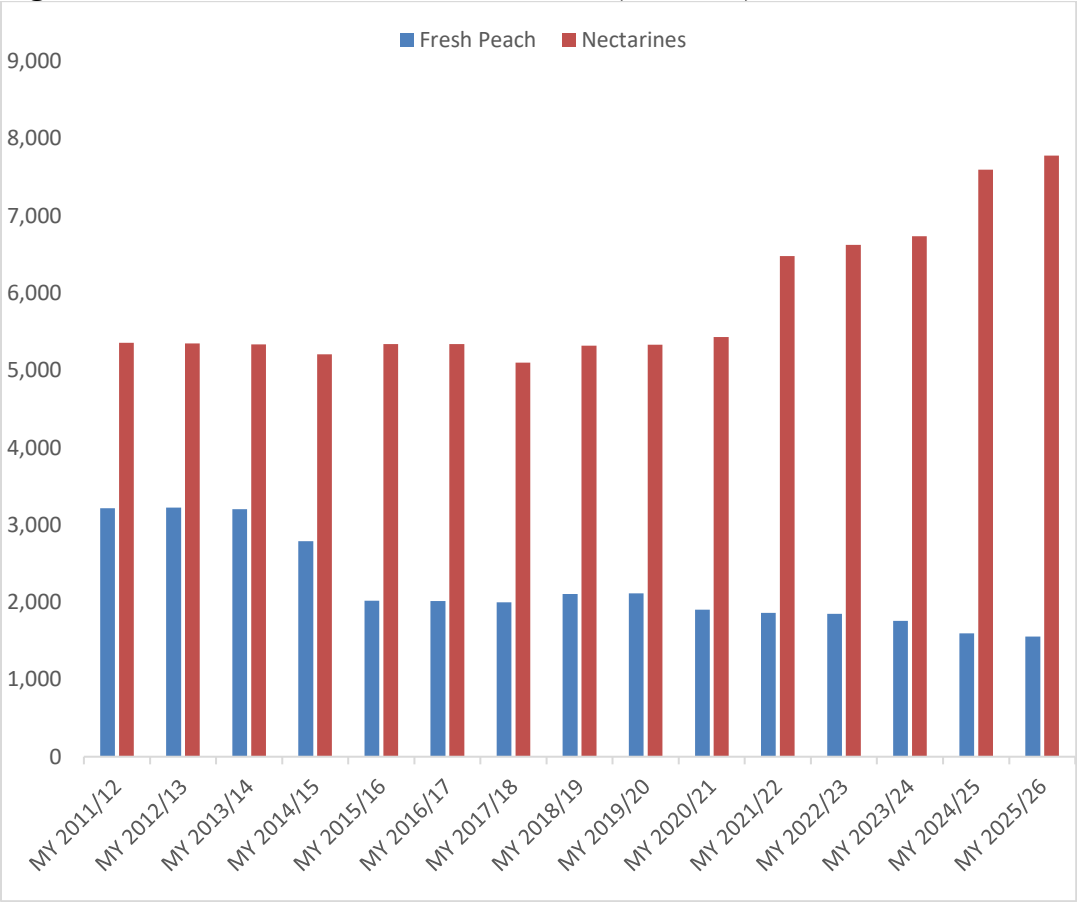
The latest ODEPA-CIREN Fruit Census data indicate that Chile had an estimated 7,778 hectares planted with nectarines in 2025, representing 2.0 percent of the country's total fruit area. Nectarine area increased at an average annual rate of 7.7 percent between 2020 and 2025, continuing a long-term expansion trend. This growth reflects the stronger export-oriented returns available for nectarines relative to fresh peaches and has encouraged growers to replace or replant less profitable stone-fruit orchards. O'Higgins is the country's principal nectarine-producing region, with approximately 4,368 hectares, or 56 percent of the national total, while the Metropolitan Region accounts for approximately 1,425 hectares, or 18 percent. Together, these two regions represent roughly three-quarters of Chile's nectarine area. O'Higgins and the Metropolitan Region remain the principal production areas because of

their suitable climatic conditions, established fruit-growing infrastructure, and access to export packing and transportation facilities.

In contrast, fresh peach area has continued decreasing. ODEPA-CIREN estimates that Chile planted 1,557 hectares of peaches for fresh consumption in 2025, down from 1,902 hectares in 2020 and representing an average annual decline of 3.9 percent between those years. The decline reflects the comparatively lower profitability and commercialization prospects of fresh peaches relative to nectarines and other stone fruits, particularly cherries. As growers seek higher returns, some peach orchards have been removed or converted to alternative crops.

O'Higgins remains the country's main region for fresh peach production, with approximately 843 hectares, accounting for about 52.7 percent of the national area. The Metropolitan Region follows with approximately 465 hectares, or 30.5 percent, while Valparaíso has approximately 190 hectares, representing about 13 percent. Thus, these three regions account for approximately 96 percent of Chile's fresh peach area. The concentration of production in these regions reflects their established stone-fruit production base and access to packing, transportation, and export infrastructure (Table 6).

Figure 4: Peach and Nectarine Area Planted (Hectares)



Source: based in ODEPA, 2026

Note: data does not include canned peaches

Table 6: Nectarine Area Planted by Region (Hectares)

Region	Planted Area (ha)	Three-Year Variation (%)¹	Share (%)
O'Higgins	5,694	16.4%	75.0%
Metropolitana	1,424	5.7%	17.7%
Valparaíso	374.5	38.1%	3.6%
Maule	244	-	3.7%
Other	40.5	-	
Total	7,777	14.7%	100.0%

Source: ODEPA, 2025

¹Three-Year Variations with value zero indicate that the latest census was at there is no official information for the three-year period.

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

Region	Area Planted (ha)	Three-Year Variation (%)¹	Share (%)
O'Higgins	843.4	-	52.7%
Metropolitana	464.7	-4.6 %	30.5%
Valparaíso	189.8	-	13.0%
Others	59.7		3.8%
Total	1,557	-	100.0%

Source: ODEPA, 2025

¹Three-Year Variations with value zero indicate that the latest census was at there is no official information for the three-year period.

Map 2: Peach and Nectarine Production Regions in Chile.



Source: Google Earth

Trade:

In MY 2026/27, Post forecast exports of fresh peaches and nectarines to reach 149,013 MT, a 8.6 percent increase over the 137,107 MT reached in MY 2025/26. This growth is driven by higher production volumes, due to the incorporation of new production area and strong international demand for Chilean nectarines, which are increasingly preferred in export markets due to their quality and flavor profile.

China remained the dominant market for Chilean nectarines, with exports totaling 46,883 MT during in MY 2025/2026, a 17.7 percent decrease compared to MY 2024/2025. Export value to China decreased to \$60.3 million, a 18.8 percent decrease. The United States continues to be second highest destination but also saw a significant reduction in export volumes, with shipments decreasing by 20.7 percent, reaching 29,018 MT. Export value to the United States decreased by 15.9 percent, totaling \$41.8 million.

In MY 2025/26, Chile's fresh peach and nectarine exports reached 137,107 MT, a three percent decrease over MY 2024/25. This decrease was driven mainly by a combination of factors which include lower exportable volume and quality/market constraints. For nectarines, the harvest season started early due to warmer temperatures during the development of the fruit, which increased pressure to harvest before optimal maturity.

In MY 2024/2025, 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).

Table 8: Chile Exports to The World by Volume

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (MT)	MY 2024/25 (MT)	Variation (%)	Nov 2024 - May 2025 (MT)	Nov 2025 - May 2026 (MT)	Variation (%)
The World	115,031.00	141,180.00	22.73	141,180.00	137,107.00	-2.9
China	46,198.00	56,978.00	23.33	56,978.00	46,883.00	-17.7
United States	28,983.00	36,578.00	26.21	36,578.00	29,018.00	-20.7
Mexico	10,870.00	12,033.00	10.70	12,033.00	19,488.00	62.0
Taiwan	5,284.00	6,136.00	16.12	6,136.00	8,102.00	32.0
Netherlands	4,669.00	5,293.00	13.36	5,293.00	6,334.00	19.7
Brazil	6,128.00	6,692.00	9.20	6,692.00	5,166.00	-22.8
Canada	1,926.00	3,373.00	75.13	3,373.00	4,145.00	22.9
Peru	2,141.00	1,286.00	-39.93	1,286.00	3,472.00	170.0
Spain	853.00	2,029.00	137.87	2,029.00	2,207.00	8.8
United Kingdom	580.00	1,702.00	193.45	1,702.00	2,189.00	28.6
Others	7,399	9,080	22.72	12,811	12,811	-2.9

Source: Trade Data Monitor, LLC.

Note: Data does not include canned peaches

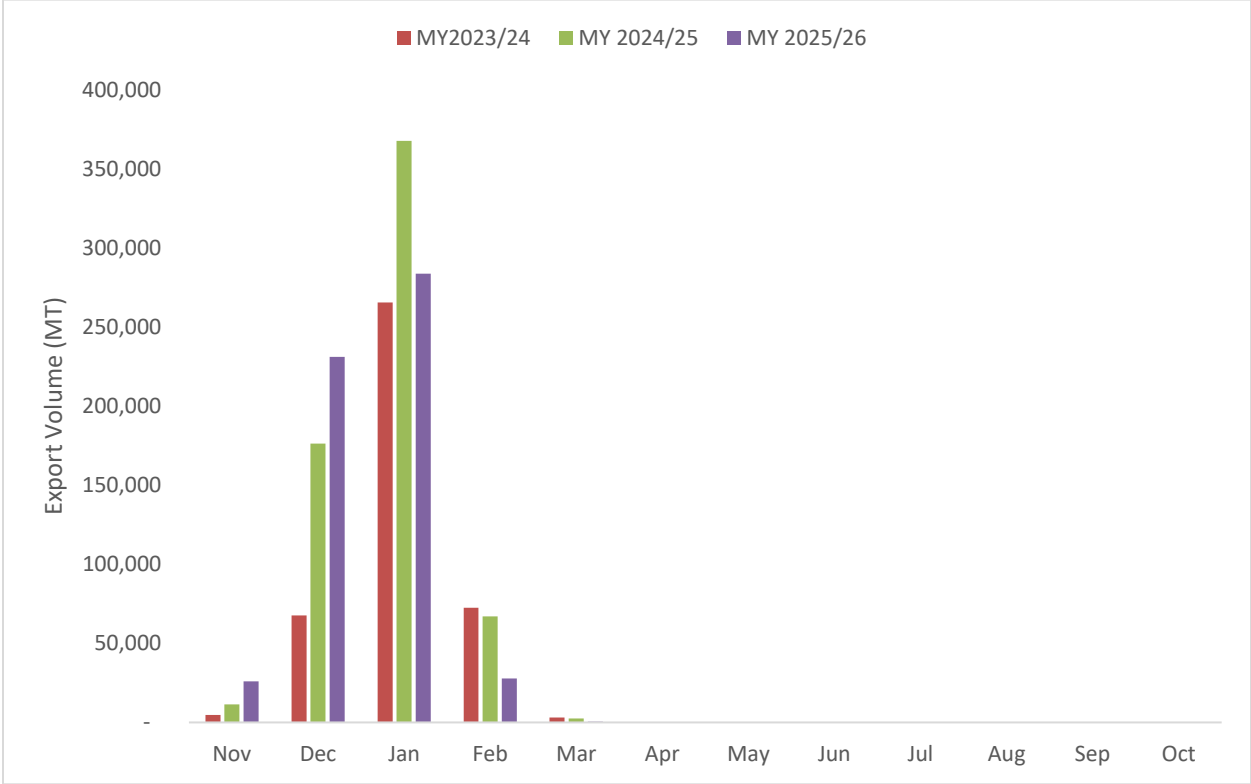
Table 9: Chile Exports to the World by Value (USD)

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (USD)	MY 2024/25 (USD)	Variation (%)	Nov 2024 - May 2025 (USD)	Nov 2025 - May 2026 (USD)	Variation (%)
_World	175,024,165	198,176,149	13.2	198,176,149	195,443,817	-1.4
China	69,047,131	74,379,020	7.7	74,379,020	60,393,842	-18.8
United States	40,649,670	49,724,717	22.3	49,724,717	41,829,007	-15.9
Mexico	21,143,945	23,556,007	11.4	23,556,007	33,457,069	42.0
Taiwan	8,896,294	9,171,434	3.1	9,171,434	11,362,868	23.9
Netherlands	7,870,995	7,349,582	-6.6	7,349,582	9,766,054	32.9
Canada	7,075,236	7,925,136	12.0	7,925,136	7,608,992	-4.0
Brazil	3,685,730	6,045,803	64.0	6,045,803	5,541,930	-8.3
Peru	2,664,160	2,566,560	-3.7	2,566,560	4,981,865	94.1
Spain	2,427,413	1,593,862	-34.3	1,593,862	3,524,121	121.1
United Kingdom	1,659,879	1,803,359	8.6	1,803,359	3,036,246	68.4
Others	9,903,712	14,060,669	42.0	14,060,669	13,941,823	-0.8

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.

Consumption:

Post estimates that Chile's domestic consumption of fresh peaches and nectarines in MY 2026/27 will remain at 60,000 MT as the market is not growing. Both fruits are well established in the Chilean market and are primarily consumed during the local harvest, which generally runs from December through February.

Domestic utilization includes fruit sold for fresh consumption as well as fruit diverted to processing when it does not meet export quality requirements. Processed fruit is used in a range of products, including juices, purees, desserts, and other preparations. Post's estimates do not include peach varieties cultivated specifically for the canning industry, such as Pomona, Andros, and Fortuna. Overall, domestic use is estimated to account for approximately 29 percent of total peach and nectarine production.

Policy:

No policy updates to report.

Attachments:

No Attachments