Required Report: Required - Public Distribution **Date:** November 05, 2026

Report Number: CI2026-0024

Report Name: Fresh Deciduous Fruit Annual

Country: Chile

Post: Santiago

Report Category: Fresh Deciduous Fruit

Prepared By: Eduardo Sanchez Ferreyra

Approved By: Amanda Hinkle

Report Highlights:

In Marketing Year (MY) 2026/27, Post projects table grape production in Chile to increase 7.8 percent to 682,500 metric tons (MT), reflecting a partial recovery from MY 2025/26 when adverse climatic conditions during harvest affected yields and fruit quality in key producing regions. Exports are projected to rise by 9.7 percent to 524,500 MT reflecting increased production as well as a larger proportion of grapes achieving export quality. Apple and pear production are expected to experience small production increases to 950,000 MT and 204,000 MT respectively with exports shadowing the increase in production and totaling 573,000 MT and 105,000 MT each. For all three crops the high probability of strong El Niño climatic events during the flowering and harvesting season limits upward projections for production.

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

Commodities:

Grapes, Table, Fresh

Production, Supply and Distribution

Table 1: Production, Supply and Distribution:

Grapes, Fresh Table	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	33155	33155	32500	31325	0	30225
Area Harvested (HA)	32000	32000	31500	29760	0	28410
Commercial Production (MT)	710000	710000	670000	628000	0	677500
Non-Comm. Production (MT)	5000	5000	5000	5000	0	5000
Production (MT)	715000	715000	675000	633000	0	682500
Imports (MT)	500	450	300	600	0	500
Total Supply (MT)	715500	715450	675300	633600	0	683000
Fresh Dom. Consumption (MT)	158500	158450	150300	155600	0	158500
Exports (MT)	557000	557000	525000	478000	0	524500
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	715500	715450	675300	633600	0	683000
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

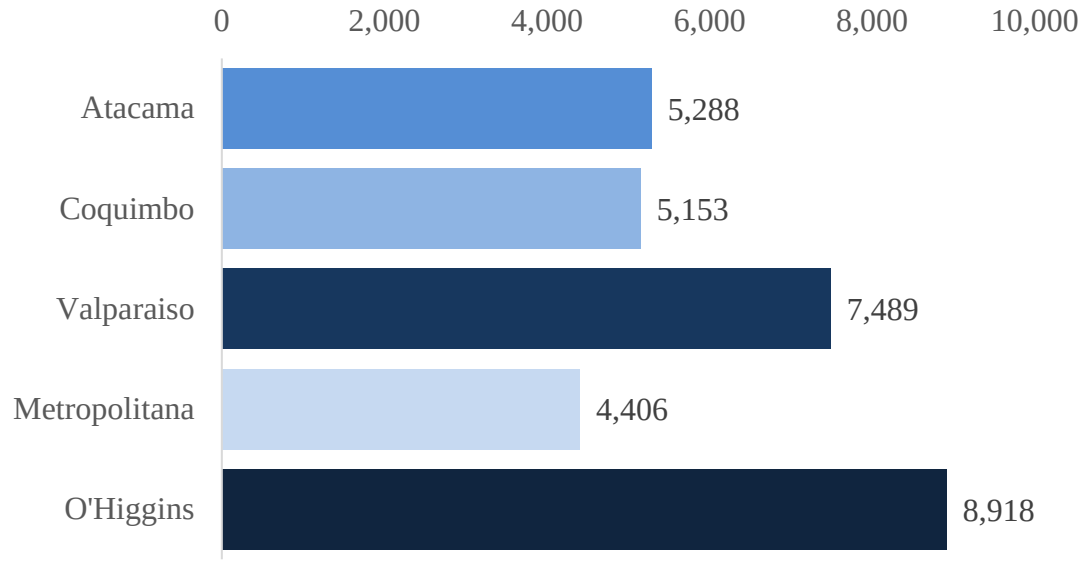
Source: Post estimates

Area planted:

The Chilean table grape industry continues to face structural changes related to the decrease in the area planted across all regions (Table 2 and Map 1). This decline is driven by a number of factors, most notably changes in weather patterns, tighter margins, increased international competition, and replacement by other more profitable crops. As a result, the national area planted registered a sharp decline of 27.2 percent in the last three years to 31,325 hectares in marketing year (MY) 2025/26, and an accumulated of 33.5 percent drop compared to a decade ago. The decrease in the area planted has been uneven between regions, with Coquimbo and O'Higgins evidencing the largest falls. Overall, the central regions (O'Higgins, Valparaiso and Metropolitana) concentrate two thirds of the total table grape planted area in Chile, with the northern regions (Atacama and Coquimbo) making up the remaining area. Overall, table grape area planted has fallen notably throughout the growing regions in recent years.

Each geographical area faces different challenges related to productive and commercial aspects. In the major producing central area table grape orchards continue to be replaced by more profitable crops such as cherries and citrus, with urban expansion also contributing to the reduction in surface. Producers in the northern regions face intense competition in international markets, principally in the United States, related to lower costs and improved competitiveness of Peruvian table grapes. This competition has driven prices down, making it increasingly difficult for Atacama producers to remain profitable, especially in the face of rising costs and water scarcity over the last decade. In addition, according to industry sources, trials with new grape varieties - principally in Atacama and to a lesser extent in Coquimbo - have not shown the same improvements in yields, quality and consistency experienced in the central regions.

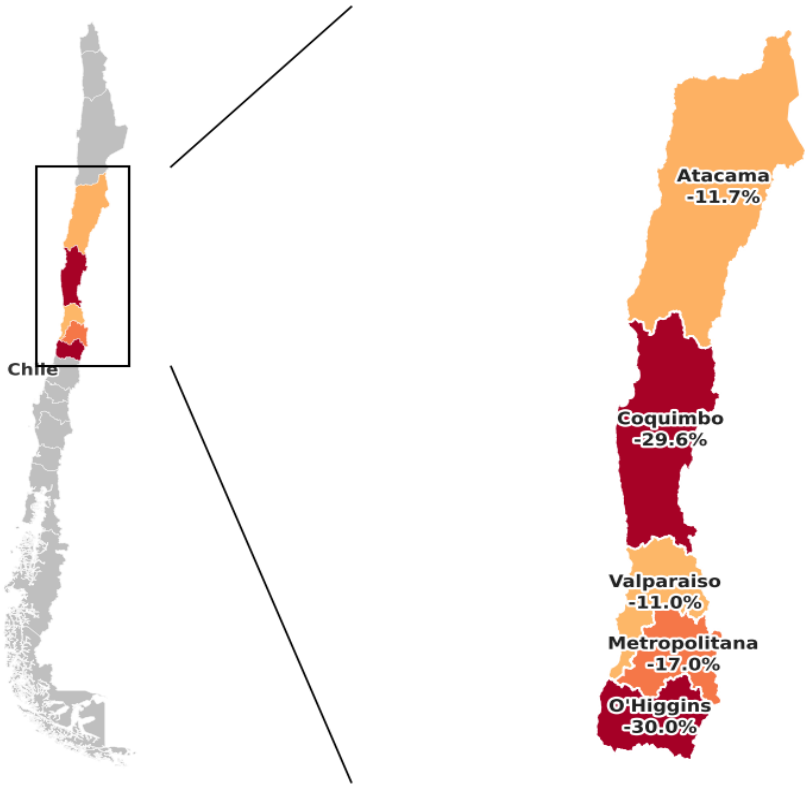
Figure 1: Table Grape Area Planted by Region (hectares)



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Latest official data available may differ from PSD estimates.

Map 1. Table Grape Area Planted in Chile

Three-year Variation by Regions

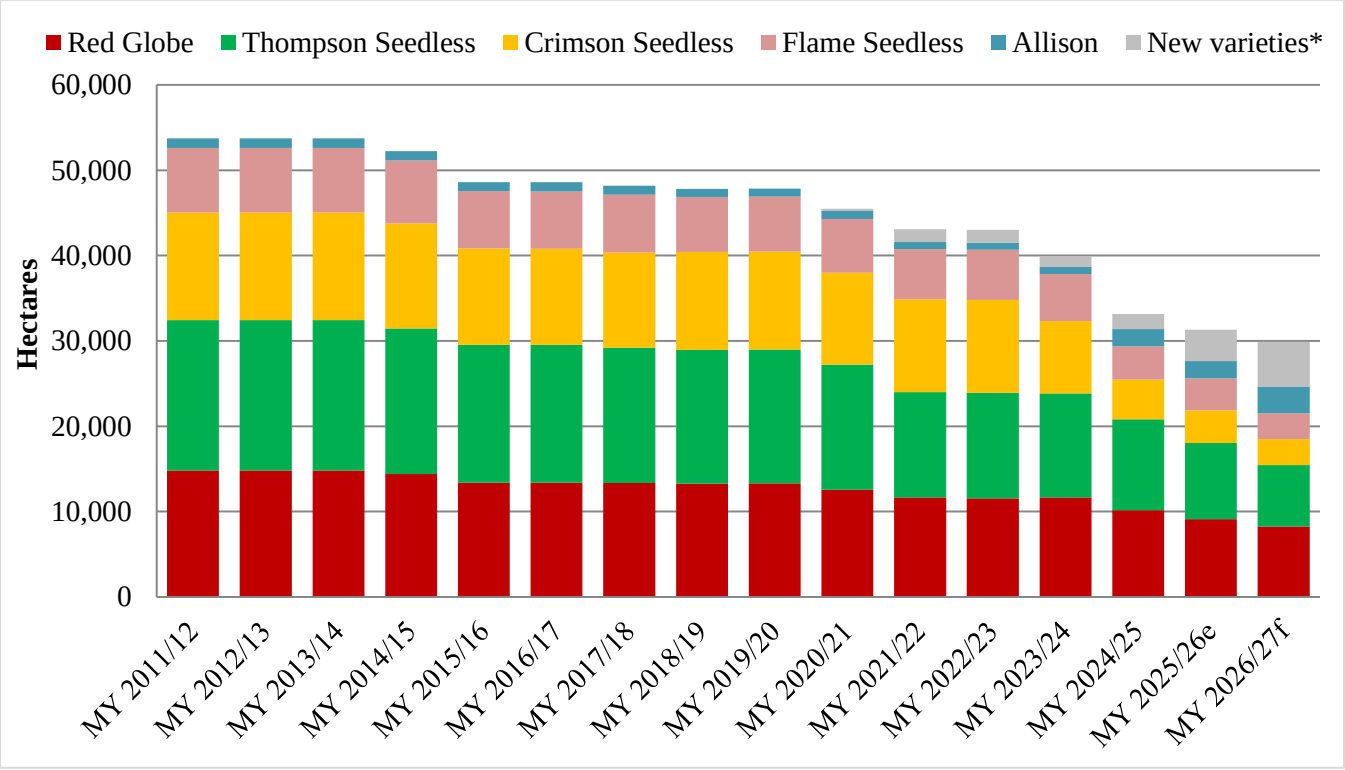


Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)

The Chilean table grape industry is facing yet another structural change driven by varietal reconversion. This trend which initiated in MY 2020/21 has now consolidated with the introduction of new and licensed grape varieties accelerating over the last three seasons, based on official data from ODEPA-CIREN and industry information. The replacement is being driven by the tight margins obtained in traditional varieties which face fierce international competition resulting in lower prices. In turn new varieties offer better quality and consistency, both attributes increasingly valued by traditional markets. Producers are also trying early season varieties to improve the market access window to the United States and reduce competition with Peruvian grapes.

While traditional dominant varieties such as Red Globe and Thompson, as well as Crimson, Flame and Allison continue to represent the majority of the area planted, new varieties including Timco, Sweet Globe and Autumn Crisp are rapidly gaining space and are now estimated to make up roughly 18 percent of the area planted in MY 2025/26 compared to only 3 percent five years ago. Based on consultations with industry, Post projects new varieties to continue to gain space and reach one third of the planted area over the next few seasons. This process occurs in parallel with the overall reduction in planted area and is mostly concentrated in the central regions of Valparaiso, Metropolitana and O'Higgins, while there are also trials in the northern regions of Coquimbo and Atacama.

Figure 2: Table Grape Area Planted by Main Varieties in Chile



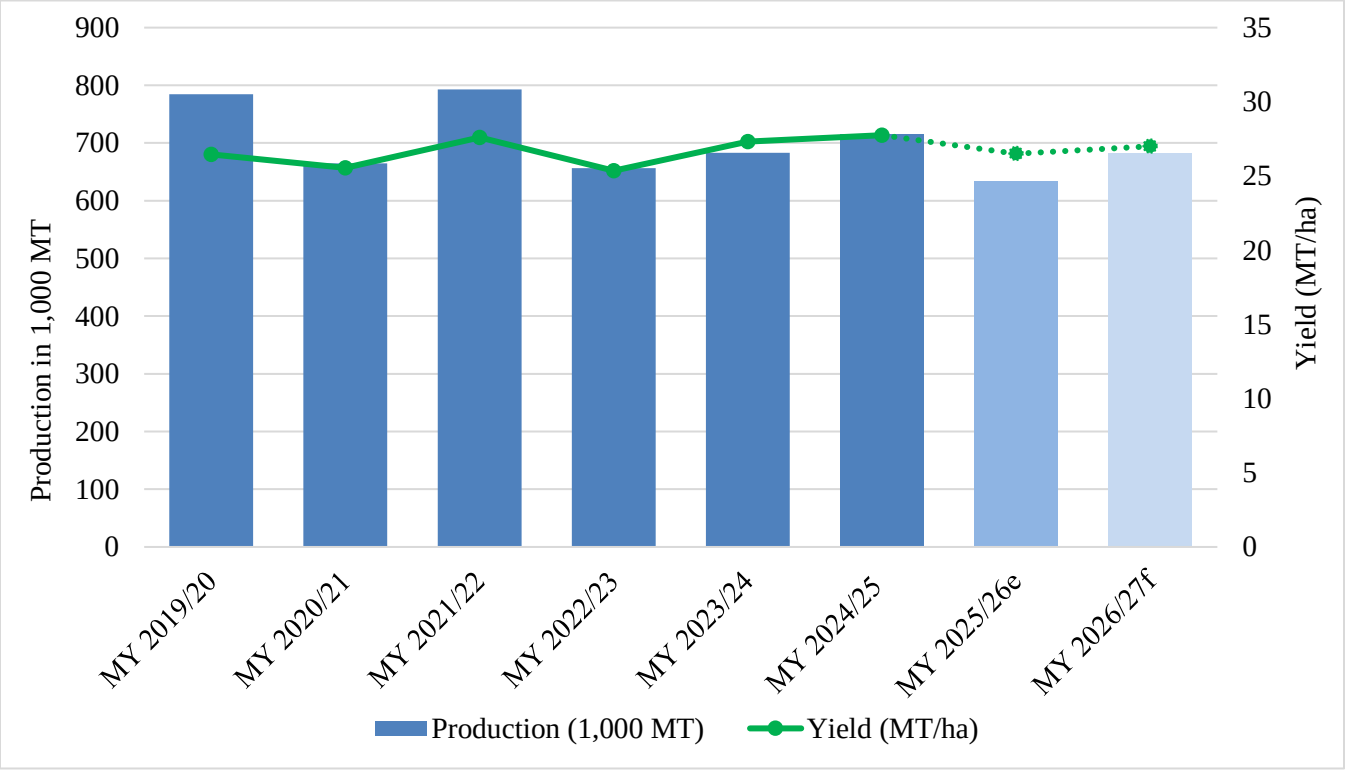
Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available information.

Production

As a result of the above-described trends, the Chilean table grape industry is transitioning to a lower-volume yet higher-quality production, which is in turn changing Chile's production and export profile. Improved production and phytosanitary practices along with the introduction of new grape varieties have allowed production to remain relatively stable over the last five MYs despite the sharp reduction in planted area - and regardless of seasonal variations related to specific climatic events, which is reflected in improved (estimated) average yields at a national level.

For MY 2026/27 Post projects production to increase 7.8 percent to 682,500 metric tons (MT) from 633,000 MT in MY 2025/26. Post's estimation for MY 2025/26 was revised downward due to production losses derived from heavy rains that affected key central areas, principally the O'Higgins region, in mid-March 2025, at the end of the harvesting season. While a large part of the fruit was still exported, a smaller percentage was either not harvested or did not reach export-quality and was diverted to the domestic market. While we expect production volumes to recover in MY 2026/27, the heavy rains registered in October 2026 and the high probability of occurrence of El Niño extreme climatic events for the remaining of the flowering season in November and December, limits our upward projection. The projected reduction in planted area, despite improved average yields, also limits projected growth.

Figure 3 – Table Grape Production and Average Yields in Chile



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available regional information.

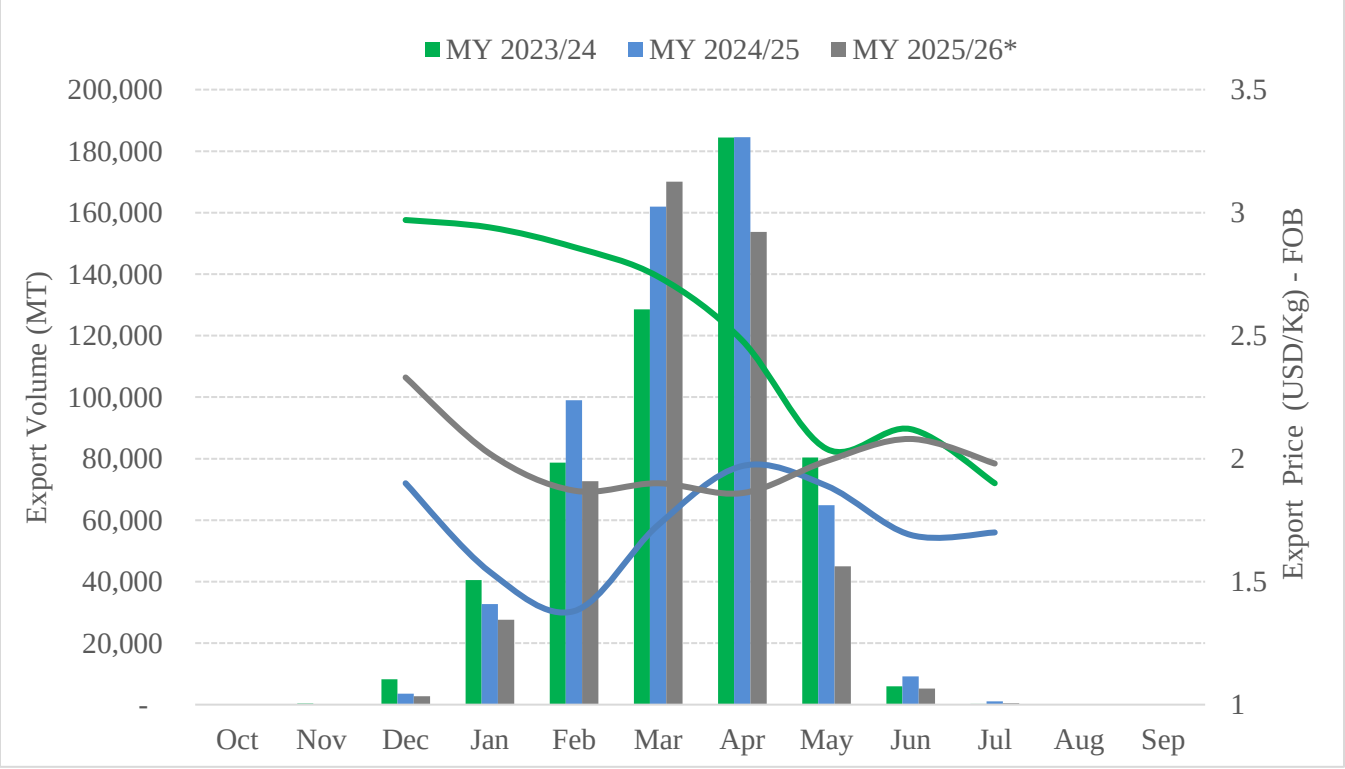
Consumption:

For MY 2026/27 Post projects domestic consumption of tables grapes in Chile to increase to 158,500 MT, up 1.7 percent from MY 2025/26. This variation is lower than the projected production increase (7.8 percent) reflecting a larger expected proportion of table grapes to be destined for export. It is worth noting that in MY 2025/26 a higher percentage of the production was absorbed by domestic consumption due to quality issues derived from heavy rain during the end of the harvesting season. As a result, Post estimates that the ratio of domestic consumption to production increased by 2.5 percentage points, resulting in almost one quarter of total production being allocated to the domestic market. Subject to the occurrence of extreme climatic conditions and international prices in MY 2026/27 Post expects this ratio to return to average levels of previous years allowing for more grape to be exported.

Trade:

For MY 2026/27 Post projects an increase in Chilean table grape exports to 524,500 MT, up 9.7 percent from MY 2025/26. The recovery is linked to the projected increase in production as well as a larger expected share being destined for export, returning to similar ratios of MY 2024/25. As previously noted, during MY 2025/26 part of the fruit collected during the end of the harvest in mid-March did not reach export quality due to heavy rains that affected orchard in the central regions. Export prices fluctuated between $2.3 per kg during the early market window and $1.9 per kg at the peak of the export curve in March/April, registering better values than the immediately previous season.

Figure 5: Chilean Table Grape Export Volume and Prices

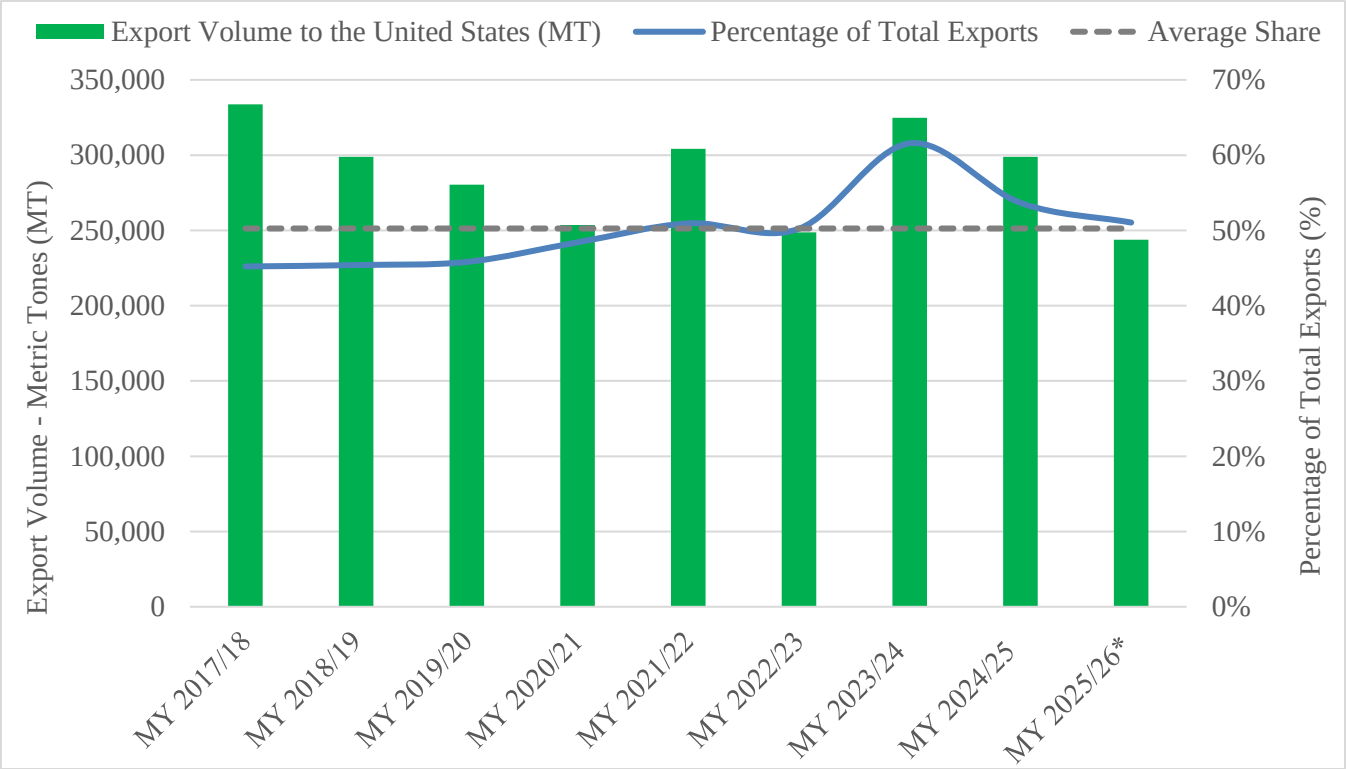


Source: FAS-USDA Santiago based on Trade Data Monitor LLC and Chilean Customs; *MY 2025/26 data to August 2026.

The United States continues to be Chile's largest export market with 243,784 MT exported in MY 2025/26 (until August 2026) reflecting an 18.4 percent decrease from MY 2024/25 (and a 25 percent drop from MY 2023/24). As a result, the share of the U.S. market in Chile's total table grape exports has dropped over the last three years from 61.6 percent in MY 2023/24 to 51 percent in MY 2025/26 (note September exports are normally negligible). Despite the more recent dynamics, this export share is in line with the average of the last decade (figure 4). The result mainly reflects increased competition from key regional suppliers, principally Peru, amid lower overall labor and logistical costs.

Figure 6 - Chilean Table Grapes Exports to the United States

Export Volume in Metric Tons (MT) and Percentage of Total Table Grapes Exports



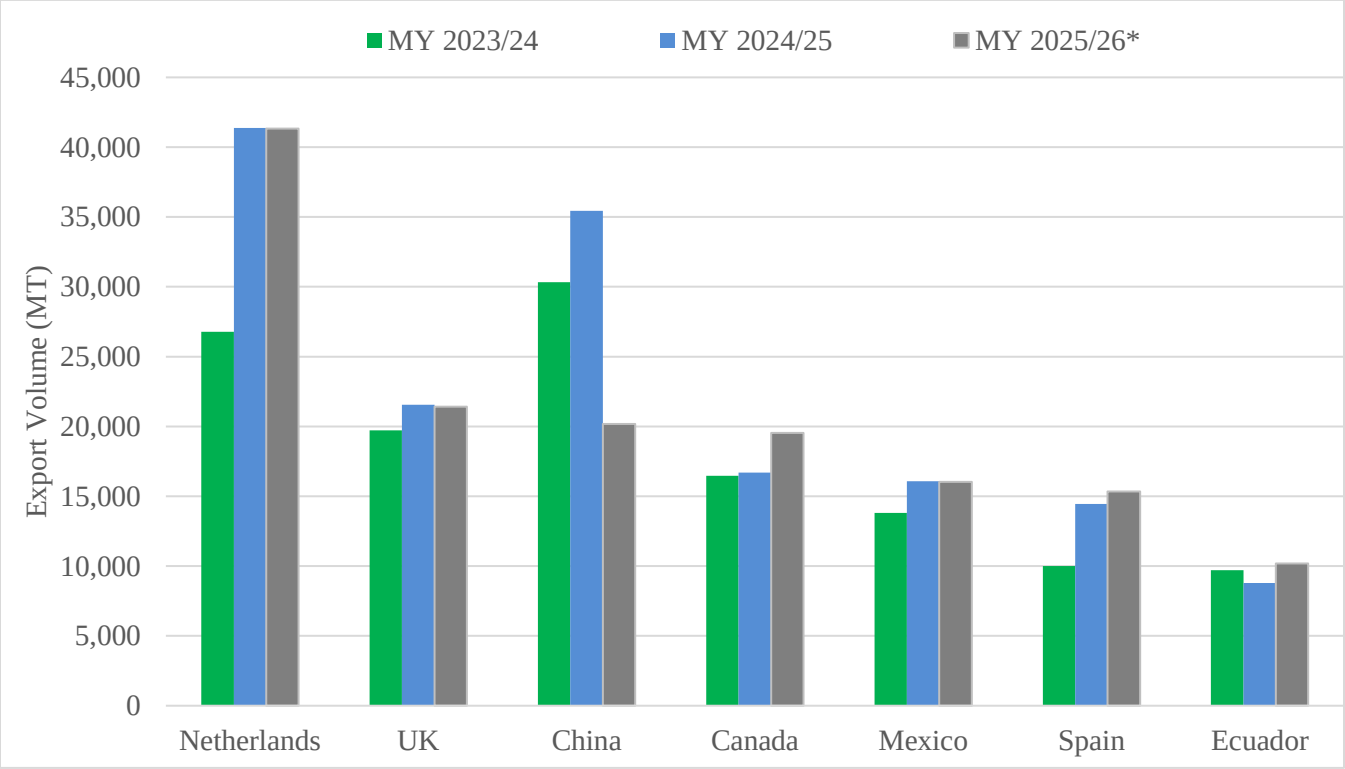
Source: FAS-USDA Santiago based on Trade Data Monitor, LLC; Note: September 2026 is estimated.

Exports to Asia have also decreased both in absolute terms and as a percentage of total exports. Shipments to China registered a sharp decline of by 43.1 percent in MY 2025/26 to 20,177 MT (data until August) compared to MY 2024/25. As a result, China's market share in Chile's total fresh table grape exports dropped from 6.4 percent to 4.2 percent in the same period displacing China from the third to the fourth position as export destination. Similarly, exports to South Korea and Japan plummeted by 60.8 percent and 39.8 percent to 5,668 MT (1.2 percent share) and 6,719 MT (1.4 percent share) respectively over the same period. This negative outcome for Chilean grapes is directly associated with the sharp increase in production and exports from China to Asian markets, which has directly impacted Chile's (as well as Peru's) price-competitiveness and market share in this region.

Contrarily, exports to Europe remained relatively stable in volume in MY 2025/26 but increased as a percentage of total exports (noting the decrease in total exports). The Netherlands – main entry point to the European Union - and the United Kingdom continue to be the main markets for Chilean grapes in Europe and are now second and third largest markets after the United States with 41,334 MT (8.7 percent share) and 21,416 MT (4.5 percent share) respectively. Other relevant markets in this region include Spain, Germany and Portugal.

Exports to the Americas (other than the United States) registered the largest gains in trade in MY 2025/26 and as a percentage of total exports. Shipments to Canada increased by 17 percent compared to MY 2024/25 to 19,528 MT and consolidated Canada as the fifth largest destination for Chilean grapes with 4.1 percent share. Similarly, countries of the pacific coast of the Americas such as Mexico, Ecuador and Colombia evidenced increases in their market share. Together these three countries already represent 7.2 percent of Chile's total fresh grape exports.

Figure 7 - Chilean Table Grapes Exports –Relevant Markets (other than the United States)
Export Volume in Metric Tons (MT)

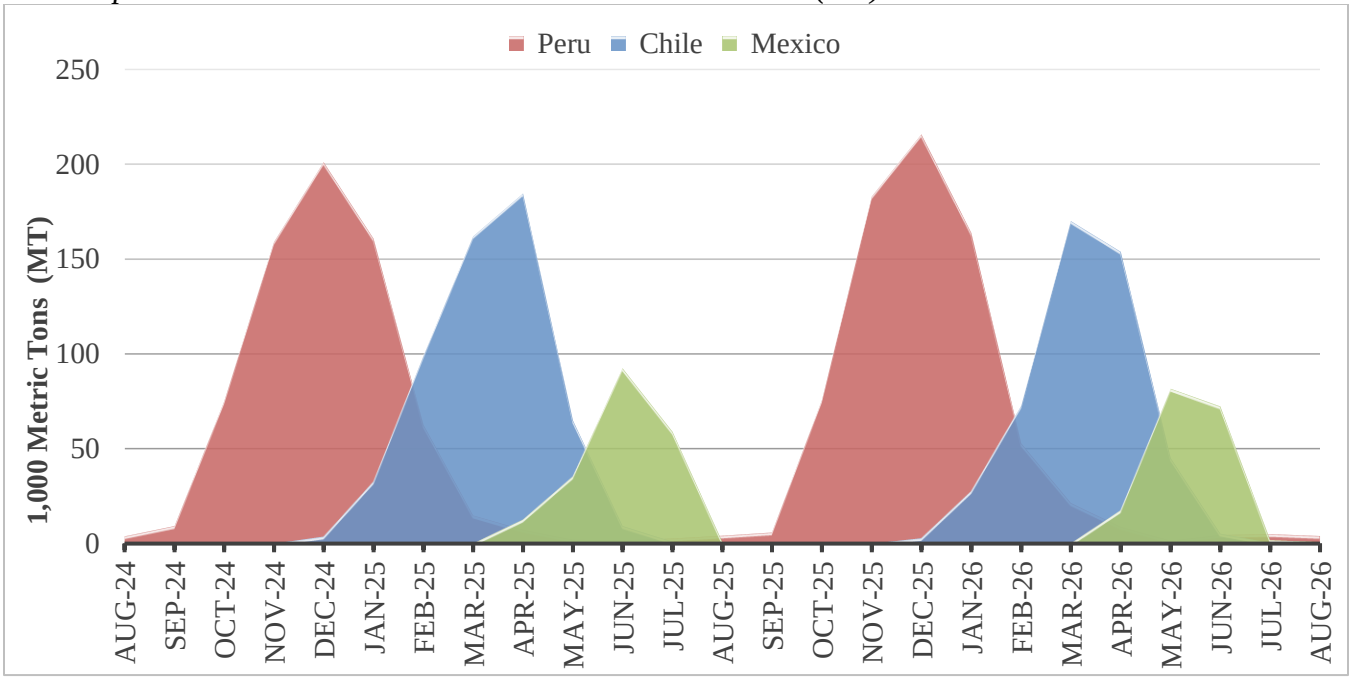


Source: FAS-USDA Santiago based on Trade Data Monitor, LLC; Note: September 2026 is estimated

Chilean fresh table grape exports are concentrated from December to June with a peak in March through April replicating the harvesting season. Early harvest commences on week 45 (November) in the northern region of Atacama and concludes in week 20 (May) in O'Higgins. Exports to the U.S. market are staggered with other relevant producers and exporters in Latin America such as Peru and Mexico,

resulting in periods with different levels of overlapping which impact total supply and reflect on export prices (figures 3 and 4). The commercial cycle for Chile begins with a market window in December-January that coincides with the tail of Peruvian exports when the highest export prices of the season can be obtained. This is followed by a period of correction in February-April as the bulk of Chilean production enters the market and prices decrease or stabilize. The cycle ends with a final market window in May-June that coincides with the beginning of the Mexican harvest.

Figure 4. Table Grapes Exports Seasonality – Chile and Other Relevant Exporters in the Region
Total Exports to the World in Volume – Thousand Metric Tons (MT)



Source: FAS-USDA Santiago based on Trade Data Monitor, LLC.

Policy:

Phytosanitary and Regulatory: On September 30, 2025, the D.C. District Court vacated the Final Notice (89 Fed. Reg. 58703) allowing importation of Chilean table grapes produced under a systems approach or treated with irradiation. In compliance with the Court's order and pending further legal action, the Animal and Plant Health Inspection Services (APHIS) will no longer issue import permits for grapes produced under a systems approach or treated with irradiation either in country or upon arrival at a U.S. port of entry (link to APHIS Commodity Import Requirements).

Commodities:

Apples, Fresh

Table 2: Production, Supply and Distribution

Apples, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	24994	24994	23000	24395	0	23750
Area Harvested (HA)	24000	24000	22000	23175	0	22550
Bearing Trees (1000 TREES)	29000	29000	27000	28250	0	27550
Non-Bearing Trees (1000 TREES)	1500	1500	1300	1500	0	1450
Total Trees (1000 TREES)	30500	30500	28300	29750	0	29000
Commercial Production (MT)	952000	952000	930000	930000	0	940000
Non-Comm. Production (MT)	10000	10000	10000	10000	0	10000
Production (MT)	962000	962000	940000	940000	0	950000
Imports (MT)	4000	3750	3000	4000	0	3000
Total Supply (MT)	966000	965750	943000	944000	0	953000
Domestic Consumption (MT)	386000	394320	39000	390000	0	380000
Exports (MT)	580000	571430	550000	554000	0	573000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	966000	965750	943000	944000	0	953000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

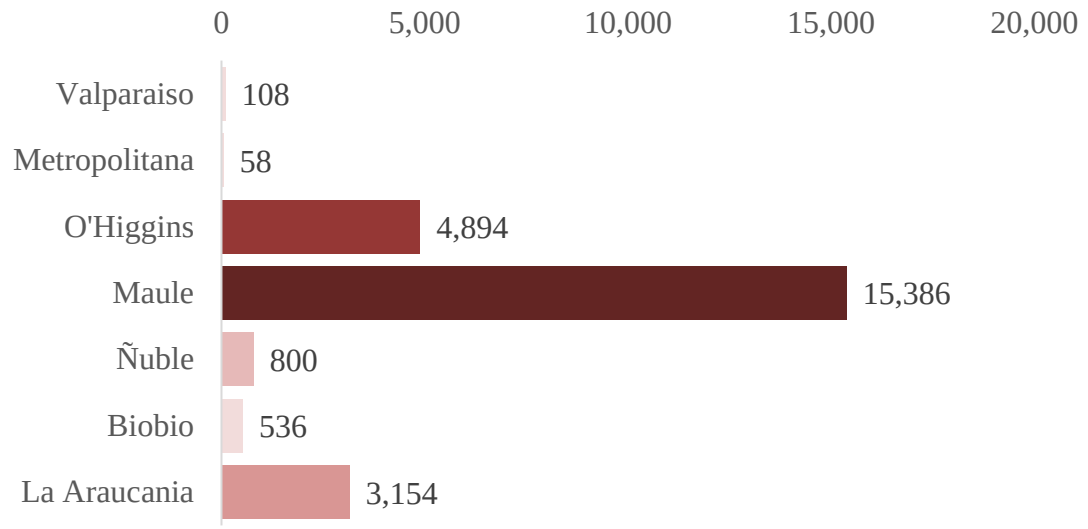
Source: Post estimates

Area planted:

Apple total area planted in Chile continues to decrease continuing the downward trend observed over the past decade. The key drivers behind this trend have been tight margins, the low return value of replacement of aging orchards and their replacement instead by more profitable crops such as cherries. As a result, the area planted with apple trees contracted by over 30 percent over the last decade to an from over 36,000 hectares ten years ago to less than 25,000 hectares today. This trend has accelerated more recently with the area planted registering a 14 percent fall in the last three years alone. Post estimates area planted for MY 2025/26 (2025 surface) at 24,395 hectares (note this is lower than most up to date official data of 24,962 hectares due to a two-to-three-year lag in land use registers depending on each region). We see this reduction continuing into MY 2026/27 - albeit at a slower pace - and the area planted stabilizing in the years ahead subject to the productive and commercial situation.

Official ODEPA-CIREN statistics also show a gradual shift of the production to the south of Chile (Figure 8 and Map 2). While the traditional production areas of the central-south regions of Maule (15,368 hectares) and O'Higgins (4,894 hectares) continue to account for over 80 percent of the total apple tree surface, the area planted in these regions registered the largest falls over the last three years, reflecting increased competition from other crops like cherries and walnuts. Contrarily, the southern region of La Araucania was the only region to grow in the same period, now representing 12.6 percent of the total surface (3,154 hectares). This growth reflects the region's potential as an emerging production zone, driven by favorable climatic conditions which result in better observed yields.

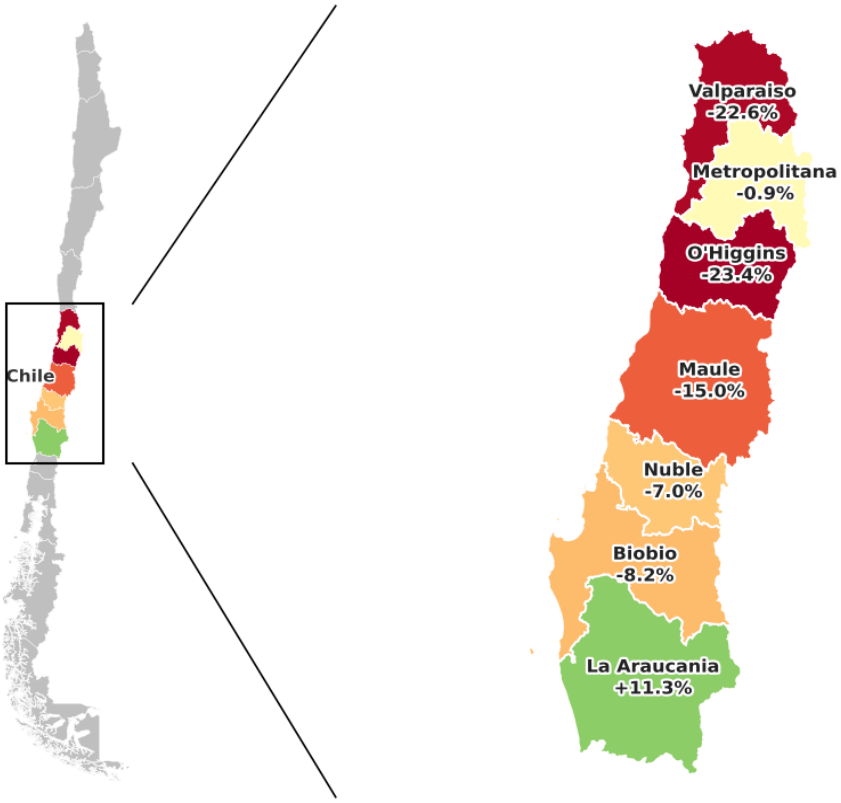
Figure 8: Apple Area Planted by Main Regions in Chile (hectares)



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Latest official data available may differ from PSD estimates.

Map 2: Apple Area Planted by Main Regions in Chile

Three-year Variation by Regions

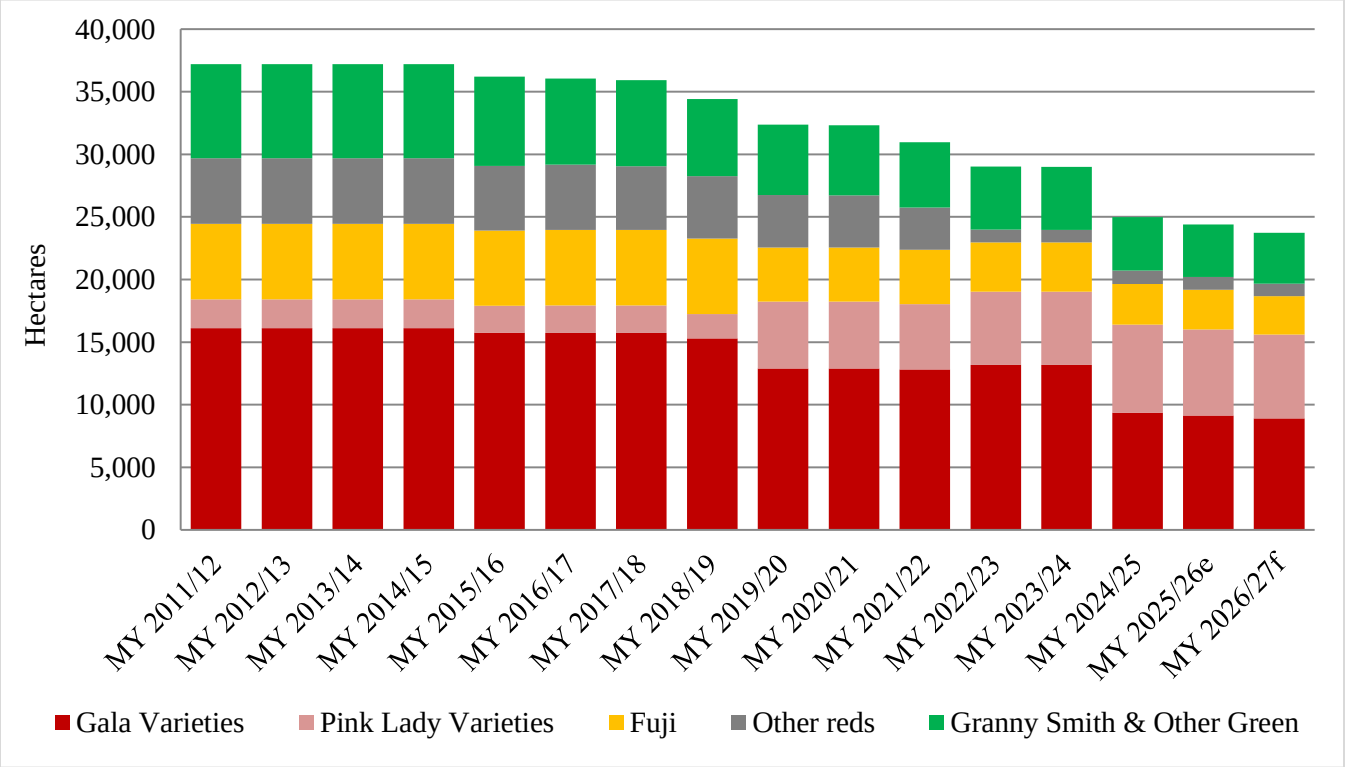


Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)

Chile's apple industry is dominated by traditional varieties such as Royal Gala, Fuji, and Granny Smith, as well as more modern cultivars such as Pink Lady, Brookfield Gala and Honeycrisp. These cultivars continue to represent roughly 80 percent of the area planted and are increasingly being produced under license. But in more recent years there has been a transition to newer varieties which offer consistent quality and improved yields, as well as better marketability and returns. These include Premium Gala within the Gala family and Cripps Pink and Rosy Glow of the Pink Lady trademark, which continue to gain pace and are now estimated to represent close to 15 percent of the area planted.

Other newer varieties such as Ambrosia, Envy, Modi, and Buckeye are being tested for their performance in different regions, although they still represent a small percentage of production. The ability to adapt to changing consumer preferences and invest in orchard renewal will be critical for maintaining Chile's position in the global apple market. Medium to longer term, the Chilean apple industry is set to transition to moderate levels of production with higher quality, consistency and variety based on the demand from each market.

Figure 9: Apple Area Planted by Main Varieties in Chile



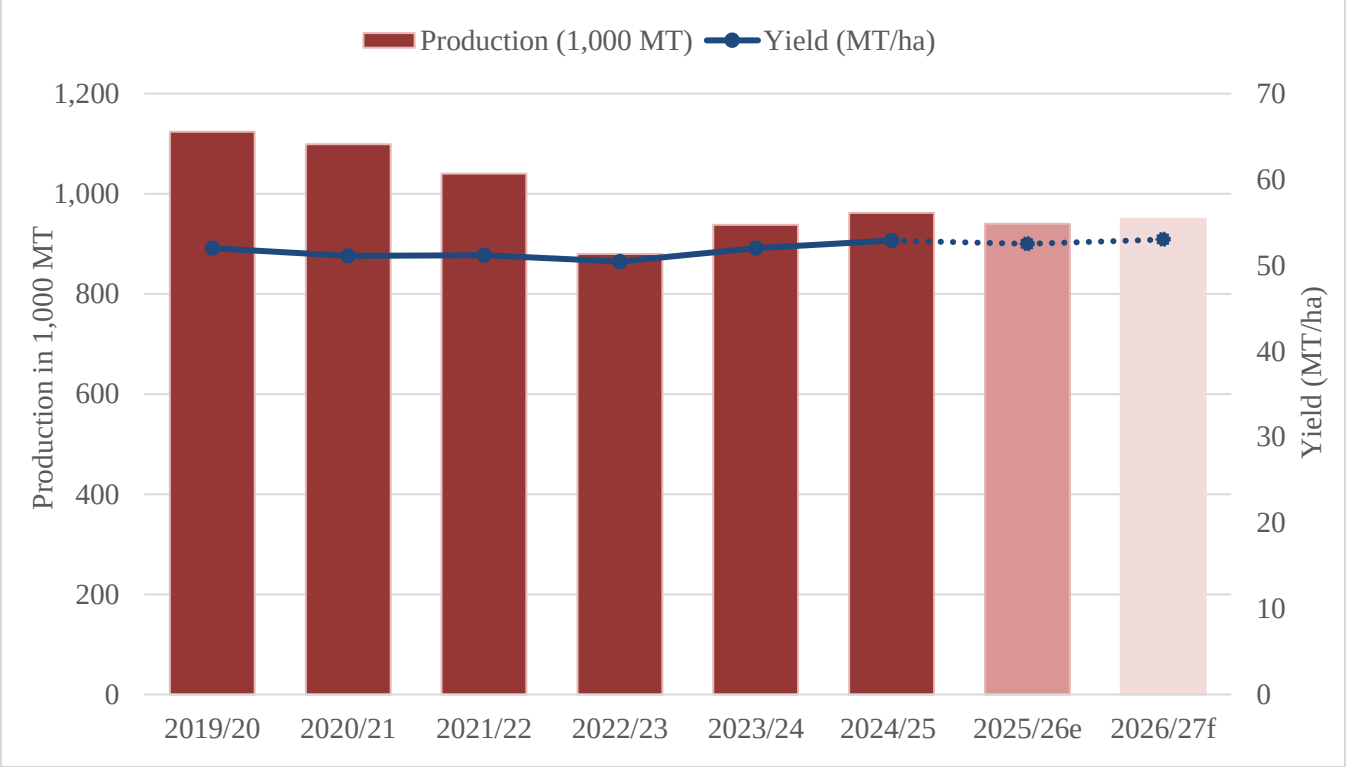
Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available information.

Production:

In MY 2025/26 Post estimates a 2.3 percent drop in production to 940,000 MT from 962,000 MT in MY 2024/25. This is related to climatic factors that impacted fruit production in Chile. In particular, heavy rains in the middle of the apple harvesting season in March affected the volume and quality of apples in the central-south production valleys of Maule and O'Higgins, thus resulting in lower-than-expected yield and production.

For MY 2026/27 Post projects a slight recovery of production to 950,000 MT (1 percent increase from MY 2025/26). While abundant rainfall has filled dams and groundwater reservoirs ensuring water availability for the next seasons, there remains a significant climatic risk based on the high probability of strong El Niño events. This includes heavy rains and hail during critical stages of the flowering and harvesting season and thermal variation that may result in heat stress and late frost that could impact the availability and quality of the fruit, including through fungal disease and fruit damage. The Maule and O'Higgins regions, principal apple production areas in Chile, are particularly vulnerable areas to El Niño weather changing patterns.

Figure 10 – Apple Production and Average Yields in Chile



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Statistics are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available regional information.

Despite the continued fall in the total area planted in Chile, apple production has seen a moderate growth since MY 2022/23. This counterintuitive behavior is related to an improvement in yields principally as a result of the introduction of new varieties and the gradual transition of production to the south. Other factors are related to improved production and on-farm management practices. But the shift of production south will bring about additional productive and logistical challenges. Higher precipitation means additional costs in fungicides and other inputs to combat fungal disease. The shift south will also mean a higher distance to existing ports and processing facilities in the central region. These factors may moderate expected yields and thus the prospective expansion of orchards ahead.

Consumption:

For MY 2026/27 Post projects domestic demand for apples (both fresh and processed) at 380,000 MT, which accounts for roughly 40 percent of apple production in Chile. Of that percentage roughly half is consumed as fresh fruit and half processed into juice concentrate, purées, and dehydrated products. Our projection is based on the stable demand for both fresh and processed apples, which remain staples in the Chilean diet. The domestic market absorbs a significant share of production and acts as a buffer against external market pressures. The processing industry complements the sector by utilizing fruit that does not meet export quality standards.

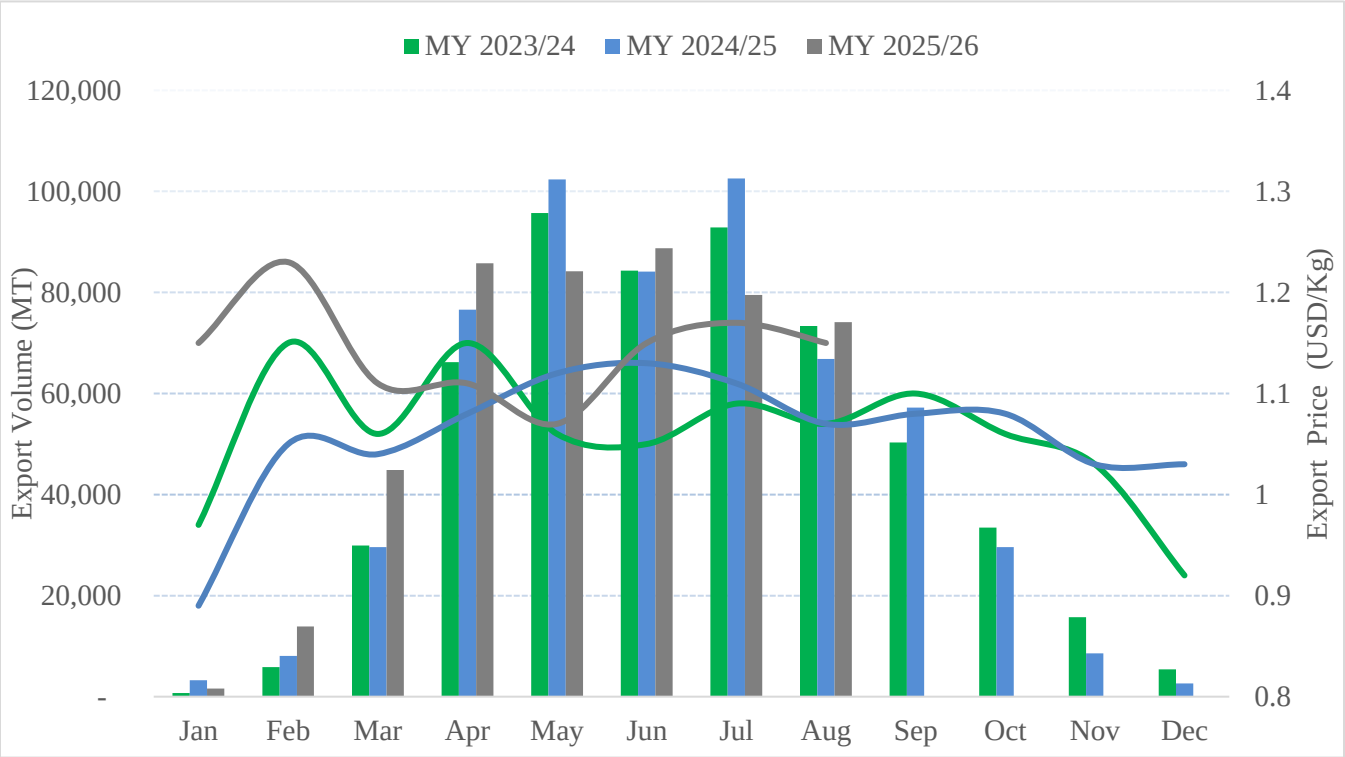
However, for MY 2026/27 expect a larger part of production to be exported compared to MY 2025/26 when climatic and productive conditions resulted in a bigger than normal percentage of the fruit not achieving export quality.

Trade:

In MY 2026/27 Post projects exports to increase to 573,000 MT, a 3.4 percent increase from the previous year's estimate of 554,000 MT. The expected increase in export volumes is a reflection of both the projected 2 percent hike in production and the share of exports over production returning to average levels after a seasonal decrease in MY 2025/26 due to quality-related issues.

Despite facing increased competition in the international market from southern hemisphere producers, principally South Africa and to a lesser extent Australia and New Zealand, attractive export prices over the last three years – amid a moderate reduction in international production due to climatic and productive factors- have incentivized production and exports. Since MY 2022/23 export prices for Chilean apples have averaged above $1.1 per kilogram, while previous prices were below $1 per kilogram. This has in turn created incentives for investment in varietal reconversion, and on-farm management and equipment.

Figure 11: Chilean Apple Export Volume and Prices



Source: Trade Data Monitor LLC and Chilean Customs

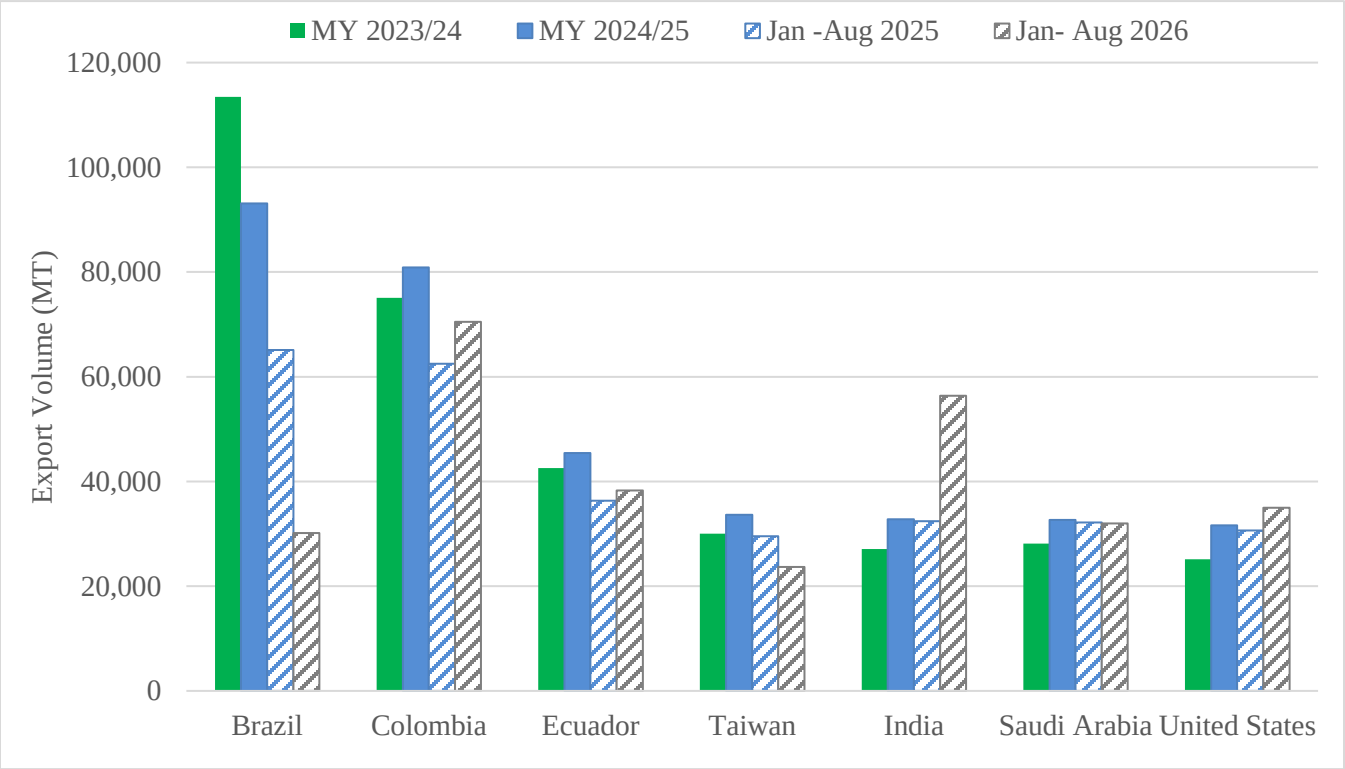
Market diversification continues to be at the core of Chile's export strategy. While traditional markets such as Europe and North America have decreased in Chile's total apple exports, other regions such as Latin America, Asia and the Middle East continue to increase their share.

During MY 2024/25 exports to Latin American absorbed roughly 54 percent of Chile's total exports. Chilean exporters have been redirecting part of their exports to closer markets to reduce logistical costs and also due to an increase in the prices paid by these markets in recent years. Brazil continued to lead as Chile's top market for apples in MY 2024/25 despite an 18 percent decrease in sales to 93,092 MT (14.2 export share). Exports to the Pacific countries of South America (Colombia, Ecuador and Peru) have all shown significant increases and together they sum 149,000 MT equivalent to 26 percent of Chile's total exports. This trend continued over January-August 2026 with Colombia displacing Brazil as Chile's top export market in the course of MY 2025/26.

Shipments to Asia and the Middle East also registered increases both in total volume and as a percentage of total exports in MY 2024/25. Exports to Taiwan and India increased by 12 percent and 20.9 percent totaling 33,606 MT (5.9 percent share) and 32,785 MT (5.7 percent share) respectively. Chilean apple exports to Saudi Arabia increased in a similar percentage and added 32,676 MT. So far in MY 2025/26 (January-August 26) shipments to India have soared by 74 percent already surpassing 56,000 MT. Exports to this market could more than double if this trend continues.

Figure 12 - Chilean Apple Exports to Main Markets

Export Volume in Metric Tons (MT)



Source: FAS-USDA Santiago based on Trade Data Monitor, LLC

Despite an increase in MY 2024/25 shipments of Chilean apples to all relevant destinations in Europe including Germany, Netherlands, United Kingdom and France, have registered sharp contractions in MY 2025/26 (January-August 2026). Exports to these four destinations which sum 83,461 MT in MY 2024/25 (equivalent to 14.6 percent export share) dropped by 65 percent so far in MY 2025/26 compared to the same period last year, to 49,610 MT. A key factor behind this result is South Africa's increased competition in this market due to better logistical conditions as well as improvements in quality and consistency of new varieties.

Among other traditional markets, exports to the United States increased by 14.2 percent so far in MY 2025/26 to 34,993 MT, already surpassing the 31,615 MT exported in the whole MY 2024/25. Chilean apples are exported to the United States in the counter-season and mostly complement domestic production with their volume varying according to U.S. production and stocks.

Policy:

No new policy developments to report.

Commodities:
Pears, Fresh

Table 3: Production, Supply and Distribution

Pears, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	5045	5045	4800	4900	0	4720
Area Harvested (HA)	5600	5600	4700	4650	0	4480
Bearing Trees (1000 TREES)	5500	5500	5000	5350	0	5150
Non-Bearing Trees (1000 TREES)	1000	1000	900	950	0	925
Total Trees (1000 TREES)	6500	6500	5900	6300	0	6075
Commercial Production (MT)	205000	204000	200000	200000	0	202000
Non-Comm. Production (MT)	2000	2000	2000	2000	0	2000
Production (MT)	207000	206000	202000	202000	0	204000
Imports (MT)	700	850	800	1000	0	1000
Total Supply (MT)	207700	206850	202800	203000	0	205000
Domestic Consumption (MT)	97700	101550	97800	100000	0	100000
Exports (MT)	110000	105300	105000	103000	0	105000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	207700	206850	202800	203000	0	205000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

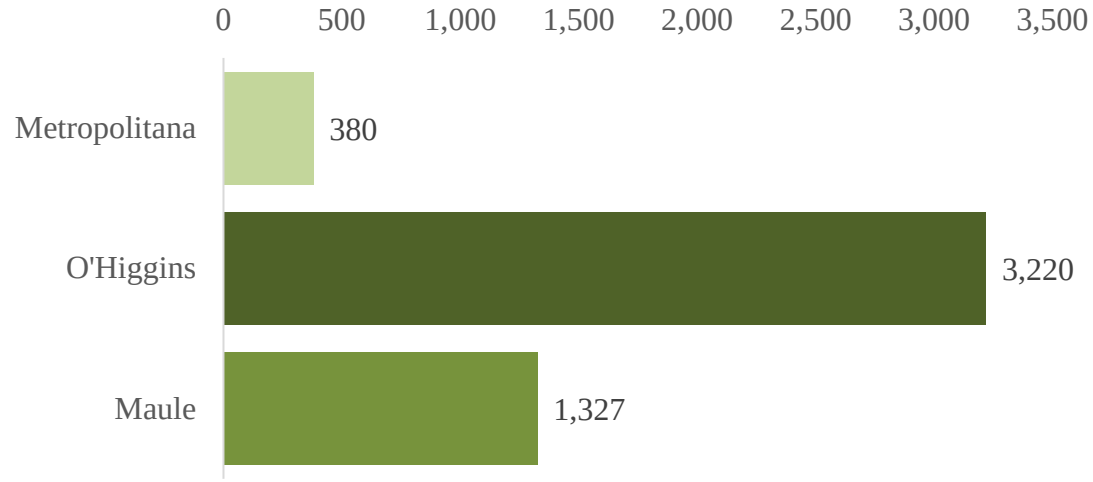
Area planted:

Area planted with pears in Chile has decreased annually since MY 2016/17. This trend is driven by persistently low margins, which have discouraged investment in pear orchards. Some of the challenges that producers face are market limitations of traditional varieties such as Abate Fetel and Coscia which are primarily demanded in European markets but have limited demand in alternative markets. Moreover, pears have a limited shelf life and are highly susceptible to physical damage during transportation, which increases costs and reduces profitability. As a result, many producers have shifted to more profitable crops, principally cherries and walnuts, further reducing the area dedicated to pears.

The *O'Higgins* region is the top pear-producing region in Chile, accounting for 63.9 percent of the total area planted (3,220 hectares). Area planted with pears showed a 13.3 percent decrease over the past three years for which there is official information available. Similarly, the *Maule* region, which represents 26.3 percent of the total area planted with pears, saw a 15.2 percent decline in area planted. The *Metropolitana* region, which accounts for 7.6 percent of the total planted area, experienced a 3.3 percent drop in planted hectares (Figure 13 and Map 3).

For MY 2025/26 we estimate total planted area at 4,800 ha, reflecting a 3.3 percent annual reduction in surface in line with the trend observed over the last decade. Post projects a similar drop in MY 2026/27 to 4,720 hectares.

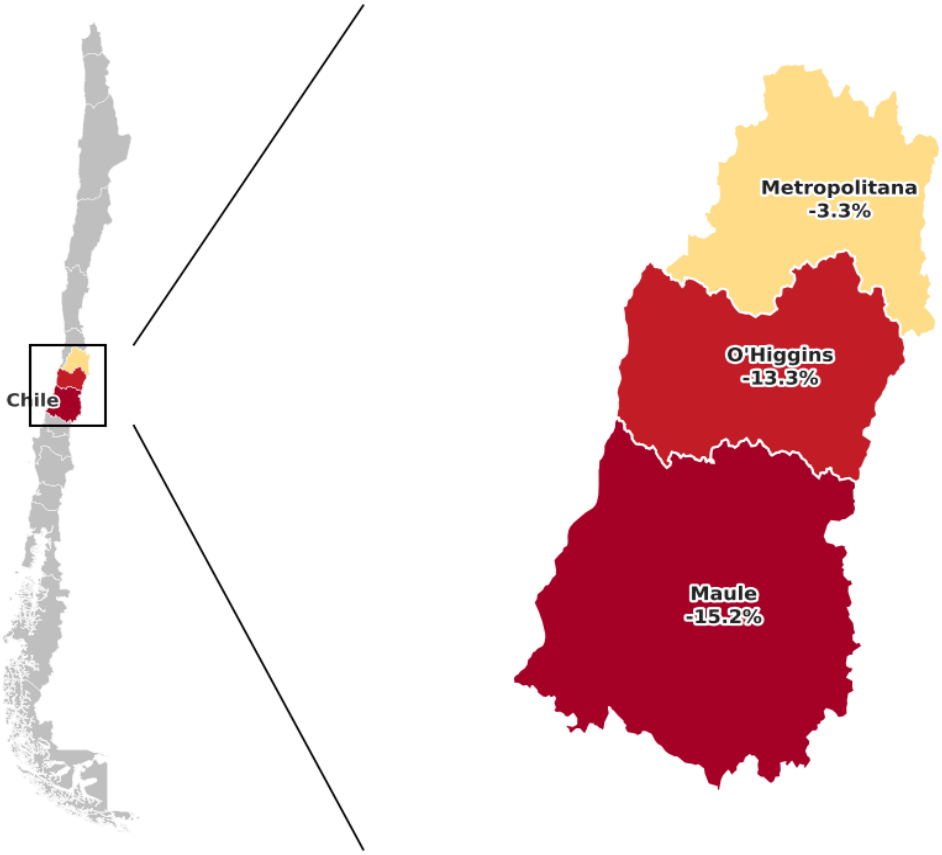
Figure 13: Pear Area Planted by Main Regions in Chile (hectares)



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Latest official data available may differ from PSD estimates.

Map 3: Pear Area Planted by Main Regions in Chile

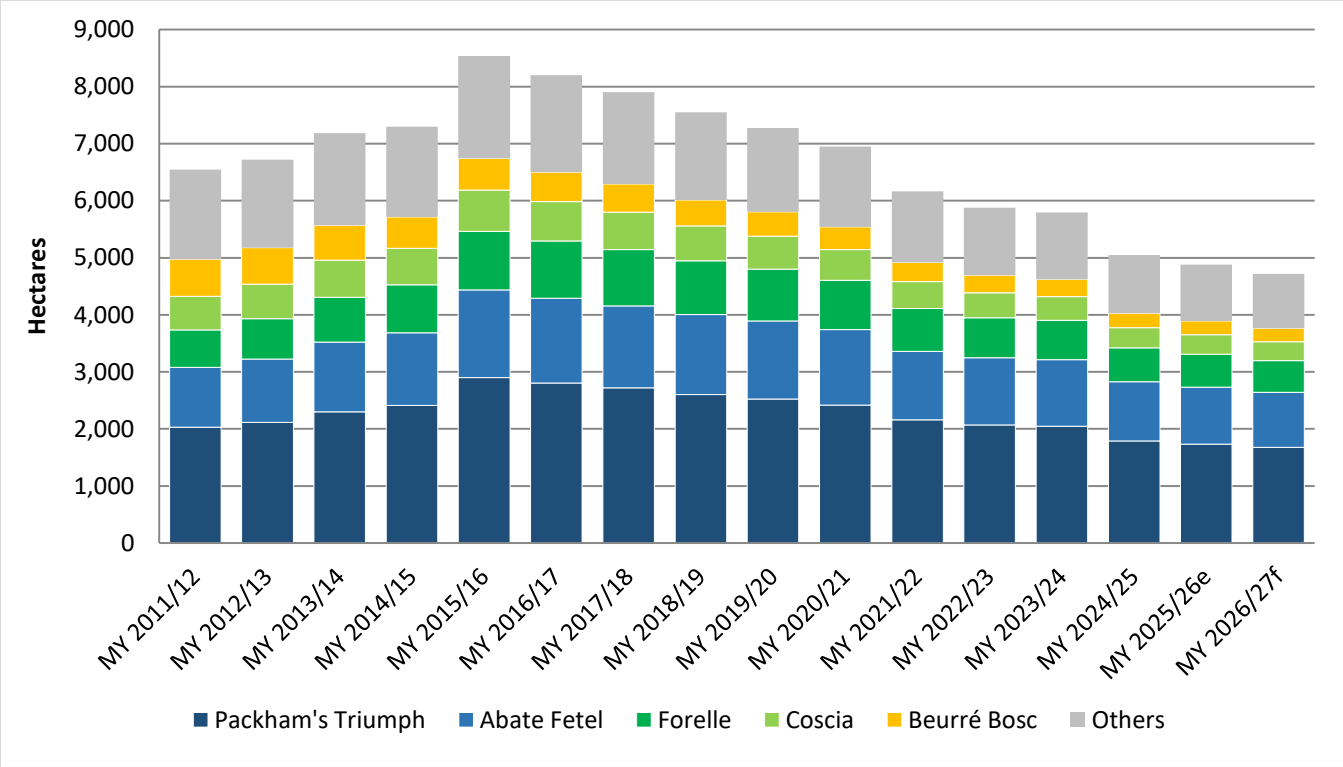
Three-year Variation by Regions



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)

The most grown varieties in Chile include Packham's Triumph and Abate Fetel. These two varieties make up over 50 percent of the total planted area with pears in Chile. Other relevant varieties include Forelle, Coscia, Baurre Bosc, Barlett and Winter Nellis. Producers are increasingly focusing on varieties with better marketability and export potential. However, the low returns continue to hamper the ability of most producers to incur the cost of large investments to replace trees and varietals.

Figure 14: Pear Area Planted by Main Varieties in Chile



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Cadasters are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available information.

Production:

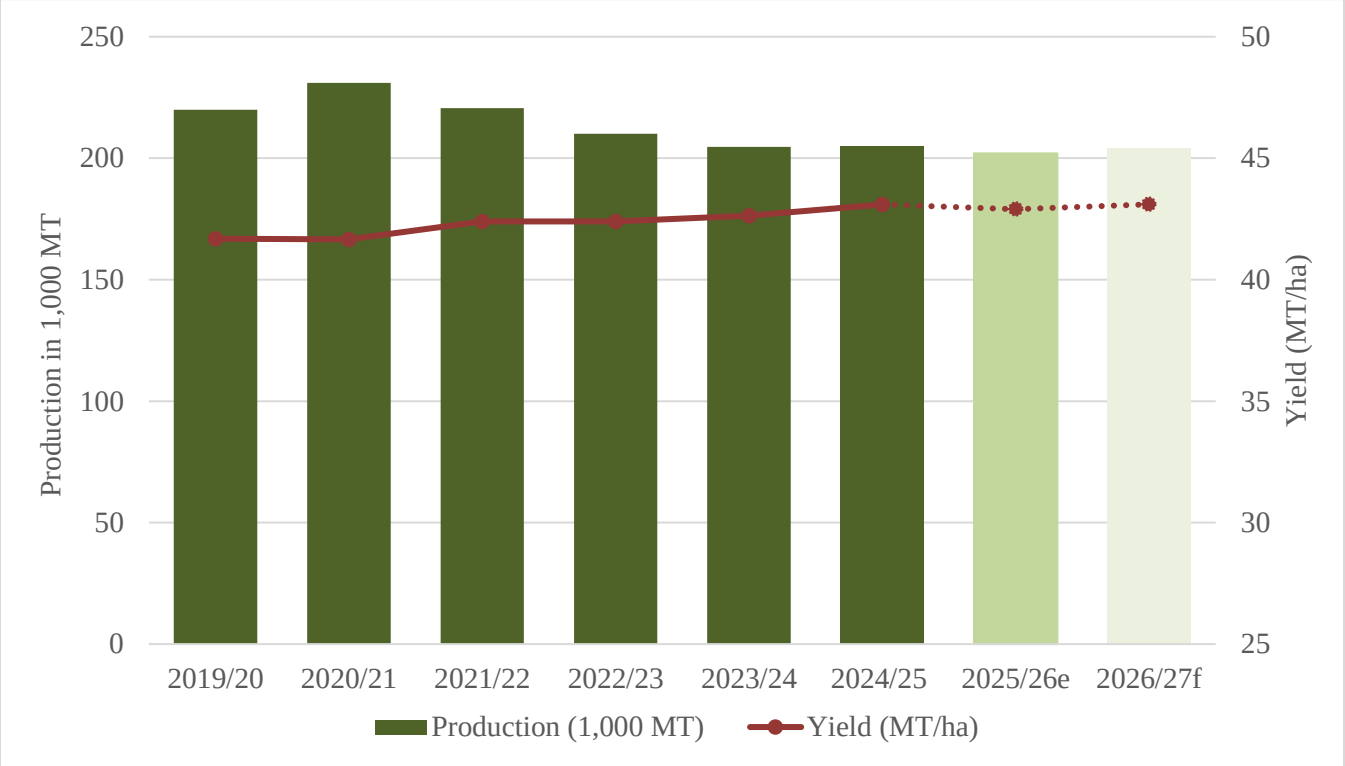
Despite the long-term drop in the planted area with pears in Chile, production has managed to decrease at a slower pace than surface and even remain relatively stable over the past three years. Post associates this behavior with improved yields driven by initial stages of varietal reconversion as well as better on-farm production and management practices. Chilean producers are increasingly focusing on quality and yield improvement as with the current margins a recovery of the area is unlikely.

In MY 2025/26 Post estimates pear production to drop 2 percent 202,000 MT (from 206,000 MT in MY 2024/25). The drop is the result of heavy rains that affected the central production regions of O'Higgins during the harvesting season, affecting yields and the quality of the fruit produced.

For MY 2026/27 Post projects a partial recovery of production to 204,000 MT. This projection is based on the high probability of strong El Niño climatic events during the flowering and harvesting seasons.

Heavy rains during September and October 2026 (flowering) could lead to favorable conditions for fungal disease in trees. Heavy rains and hail during the core harvest period of February-March could damage the fruit and result in significant production losses.

Figure 15 – Pear Production and Average Yields in Chile



Source: FAS-USDA Santiago based on ODEPA-CIREN Fruit Cadasters (Catastros Fruticolas)
Note: Statistics are published every three years by region. Data provided is the latest available for each region.
MY 2025/26 estimate; MY 2026/27 projection; Prior years are calculated based on available regional information.

Consumption:

For MY 2026/27 domestic consumption of fresh pears in Chile is projected to remain at similar levels to MY 2025/26 at around 100,000 tons. Despite the projected increase in production, Post expects that attractive international prices will incentivize foreign sales to the detriment of the domestic market.

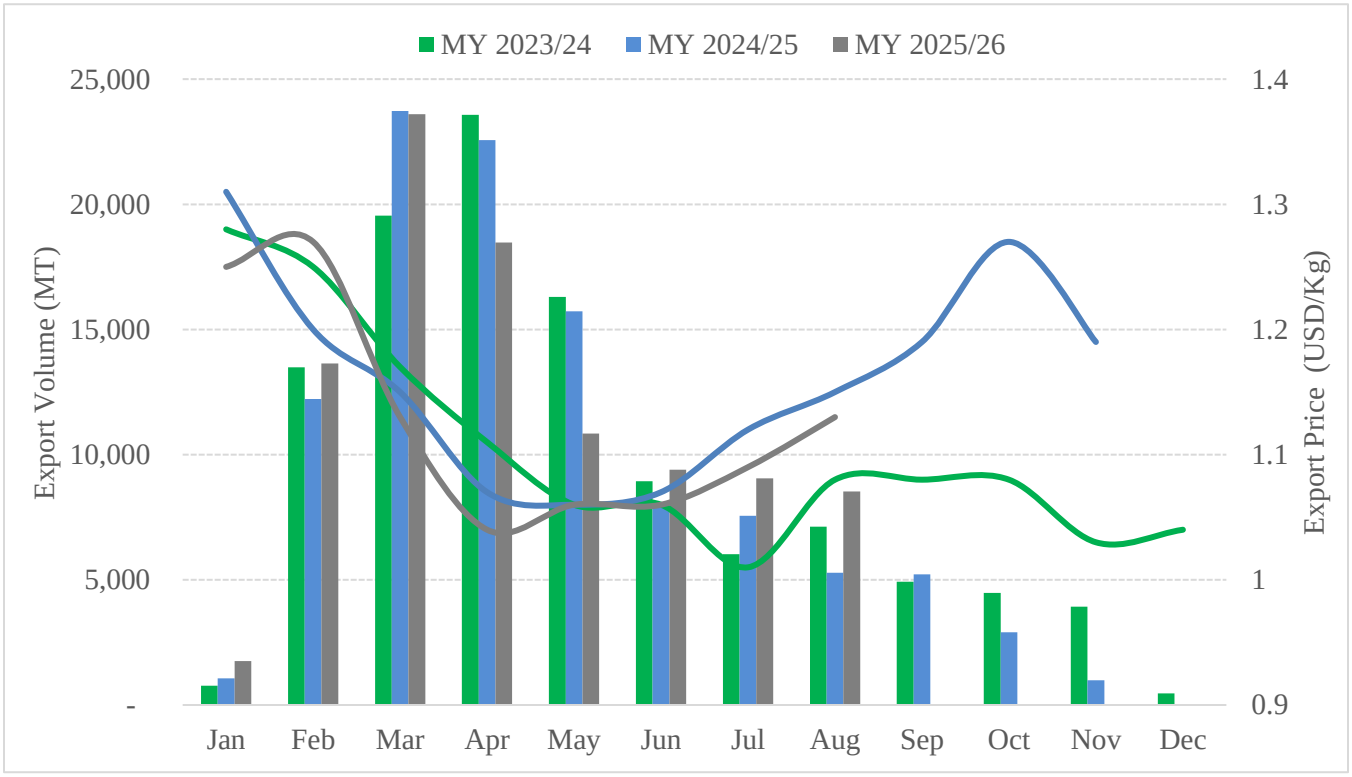
In MY 2025/26 Post estimates a 1.5 percent decrease in domestic consumption in line with the drop in production and despite a slightly higher share of production having been directed to the domestic market due to quality issues with the fruit. We have revised upward domestic consumption estimates for both MY 2024/25 and 2025/26 based on updated trade and commercial information. As a result, Post estimates domestic consumption to account for roughly 48-49 percent of total production (from 46-47 percent previously).

Chileans consume fresh pears widely, both as a standalone fruit and as an ingredient in processed products such as juices and preserves. Chilean consumers prefer the Packham's Triumph variety due to its smooth texture and long storage life. Other varieties such as Abate Fetel, Beurré Bosc, and Forelle are also available locally but tend to command higher prices and are often prioritized for export markets. Exporters select and ship larger, top-grade fruit, while local markets absorb smaller pears or those with minor imperfections, which retailers sell at lower prices in supermarkets and fruit stands. The processing industry plays an important secondary role, utilizing pears that do not meet export or retail standards. Processing accounts for around 10–12 percent of total pear production. Processors transform this fruit into juices, purees, canned pears, and baby food, products that are consumed mostly locally.

Trade:

Post estimates projects Chilean pear exports at 105,000 MT in MY 2026/27, which represents a 2 percent annual increase. Pears are challenging to produce and to export, since they are delicate and need special handling and packaging to avoid damage. This challenge has limited the expansion of export volumes to both new and current markets. For MY 2025/26 Post estimates that Chilean pear exports will be 103,000 MT reflecting a 2 percent drop from MY 2024/25. Despite favorable observed export prices during the beginning of the season, heavy rains in March 2026 delayed the harvest and resulted in a decrease of monthly export volumes in March-May with the shipments resuming normal volumes in June-August.

Figure 16: Chilean Pears Export Volume and Prices



Source: Trade Data Monitor LLC and Chilean Customs

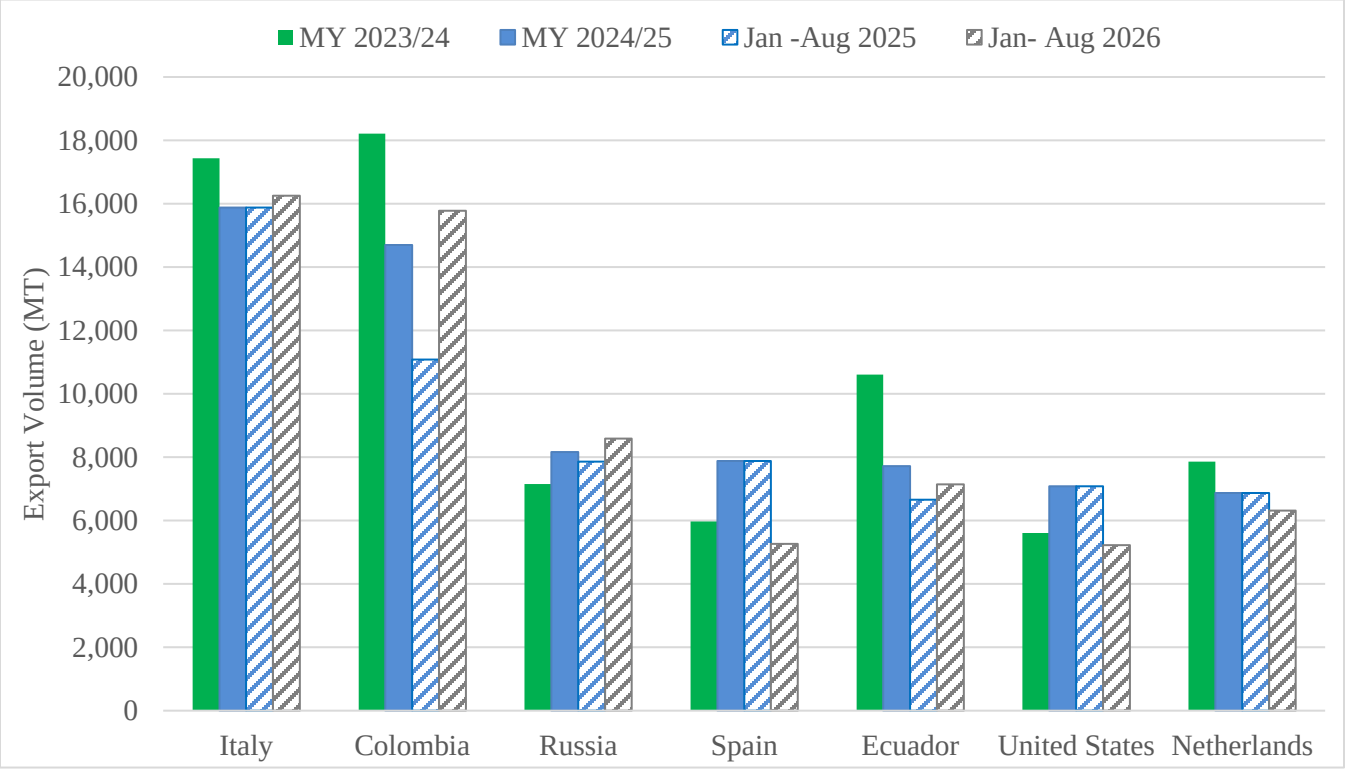
Chile exports pears to a number of markets with Europe and Latin America which account for the majority of the demand for this fruit. Market diversification has allowed Chilean producers and exporters to reduce price volatility in the face of increased international competition and domestic productive issues related to the decrease in the planted area.

Italy remains Chile's principal market for pears with a high demand for traditional varieties such as Abate Fetel and Coscia. In MY 2025/26 (data until August 2026) exports to Italy reached 16,257 MT representing 17 percent of total external sales. Other relevant markets in Europe include Russia, Spain, Netherlands and Germany. Overall, these European markets account for a quarter of Chile's exports.

Colombia has emerged as the most dynamic market for Chilean pears with a 42.4 percent increase in sales during January-August 2026 as compared to the same period in 2025. As a result, exports to this market reached 15,779 MT totaling 16.5 percent of total sales. Other regional markets such as Ecuador and Brazil continued to grow in 2026 with exports of 7,143 MT and 5,375 MY each. Together, Latin American markets make up to more than a third of Chile's total pear exports.

Figure 17 - Chilean Pear Exports by Main Markets

Export Volume in Metric Tons (MT)



Source: FAS-USDA Santiago based on Trade Data Monitor, LLC

Policy:

No new policy developments to report.

Attachments: Attachment 1 - Chile - Table Grape Exports to the World .docx

Attachment 2 - Chile - Apple Exports to the World.docx

Attachment 3 - Chile - Pear Exports to the World.docx