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Report Highlights:

In marketing year (MY) 2025/26, Chile's citrus sector will increase production in lemons, mandarins, and oranges. Lemon production will increase 4.4 percent to 237,000 metric tons (MT), driven by expanded planted area and the crop's profitability. Mandarin production will rise 3.1 percent to 270,000 MT, supported by higher yields and increased planted area, while orange production will grow 2.5 percent to 205,000 MT, reflecting a steady expansion in key regions. Domestic consumption will also increase for all three commodities, with fresh lemon consumption at 106,000 MT, mandarins at 32,000 MT, and oranges at 78,000 MT. Exports will also grow, with lemon exports projected at 135,000 MT, mandarins at 235,000 MT, and oranges at 115,000 MT.

Commodities:
Lemons, Fresh

Table 1: Production, Supply and Distribution

Lemons/Limes, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	9926	9310	10400	9923	0	10400
Area Harvested (HECTARES)	8800	8800	9000	9000	0	9500
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	192	203	197	227	0	237
Imports (1000 MT)	8	15	8	16	0	16
Total Supply (1000 MT)	200	218	205	243	0	253
Exports (1000 MT)	90	110	93	130	0	135
Fresh Dom. Consumption (1000 MT)	100	98	101	102	0	106
For Processing (1000 MT)	10	10	11	11	0	12
Total Distribution (1000 MT)	200	218	205	243	0	253
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

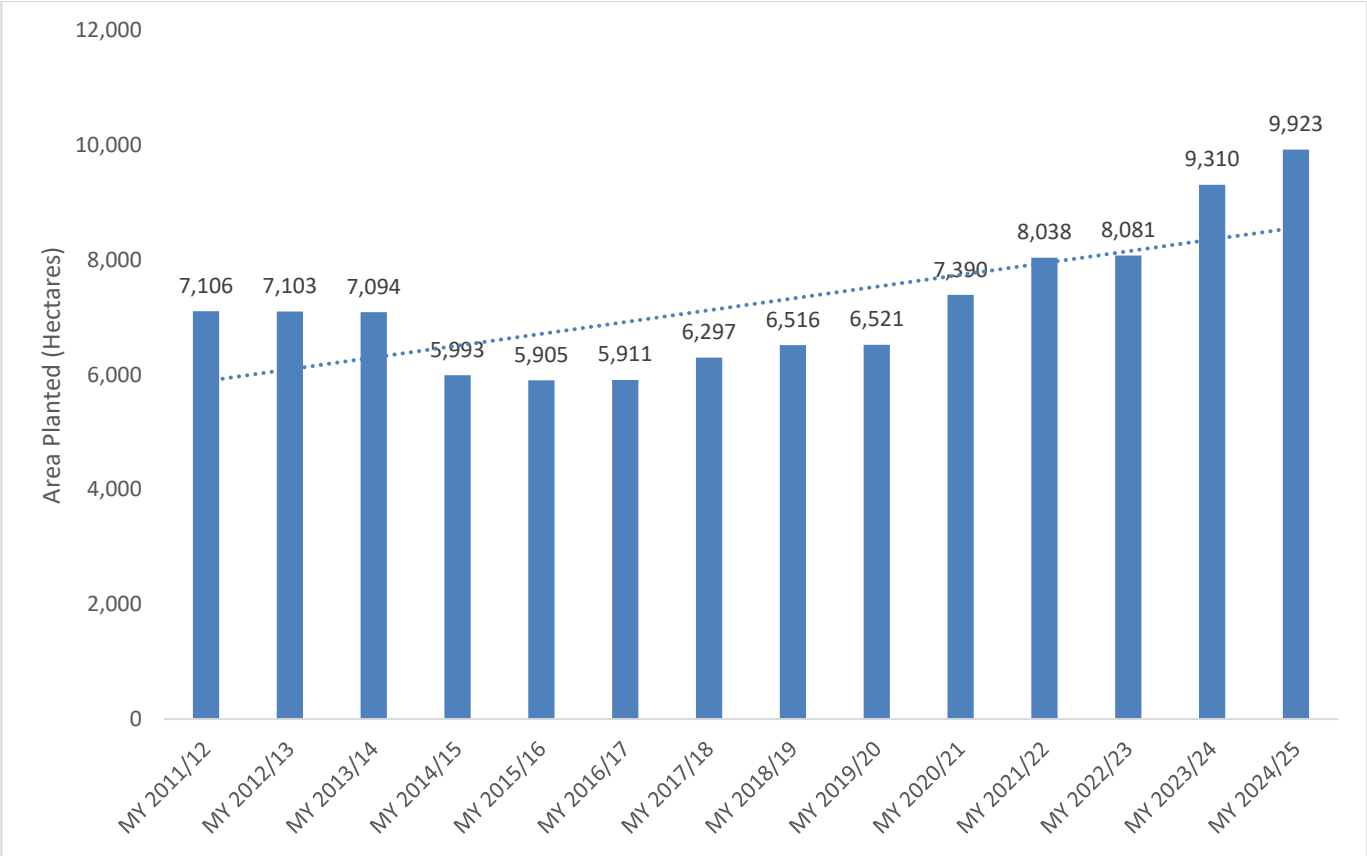
Source: Post Estimates

Production:

In MY 2025/26, Chile's lemon production is projected to increase by 4.4 percent, reaching 237,000 metric tons (MT). This growth is driven by a significant expansion in the area planted, which is expected to rise to 10,400 hectares—a 4.8 percent increase compared to MY 2024/25. This increase reflects the continued profitability of lemon cultivation as an alternative to water-intensive crops such as avocados. Producers are increasingly drawn to lemons due to their higher export prices and lower water requirements.

Production spans from the *Coquimbo* region in the north to the *O'Higgins* region in the central-south, with over 40 percent of the area planted concentrated in the *Metropolitana* region. The harvest season begins in April, with exports peaking during the Chilean winter months (June to September) when international prices are favorable. Domestic sales peak during the summer months (December to March) when production volumes decrease and local prices rise.

Figure 1: Lemon Area Planted (hectares)



Source: ODEPA, 2024

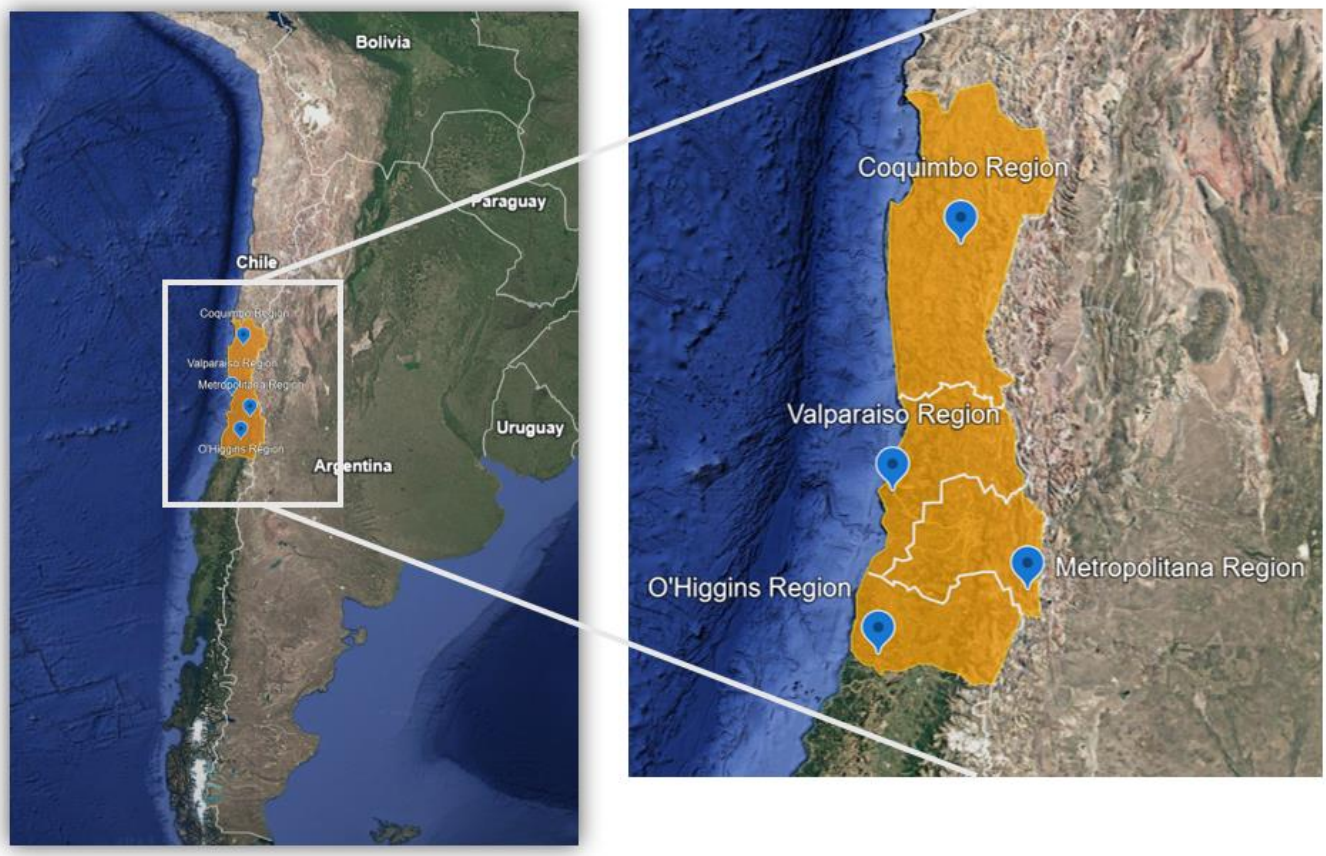
Table 2: Lemon Area Planted by Region MY 2024/25 (hectares)

Region	Area Planted (ha)	Variation* (%)	Share (%)
Coquimbo	2,145	31.7%	21.6%
Valparaíso	2,543	25.8%	25.6%
Metropolitana	4,010	21.4%	40.4%
O'Higgins	962	-2.1%	9.7%
Others	264	-	2.7%
Total	**9,923**	**23.5%**	**100.0%**

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

Source: Based on data from ODEPA

Map 1: Citrus Production Area



Source: FAS Santiago using Google Earth

Consumption:

Domestic consumption of fresh lemons is projected to grow by 3.9 percent in MY 2025/26, reaching 106,000 MT, which represents 44.7 percent of lemon production. This increase is attributed to population growth and higher demand for fresh lemons during the summer months for salads and beverages. Consumption for processing is also expected to rise by 9.1 percent to 12,000 MT, driven by increased production. Processed lemons are used for juice, essential oils, and concentrates for confectionary.

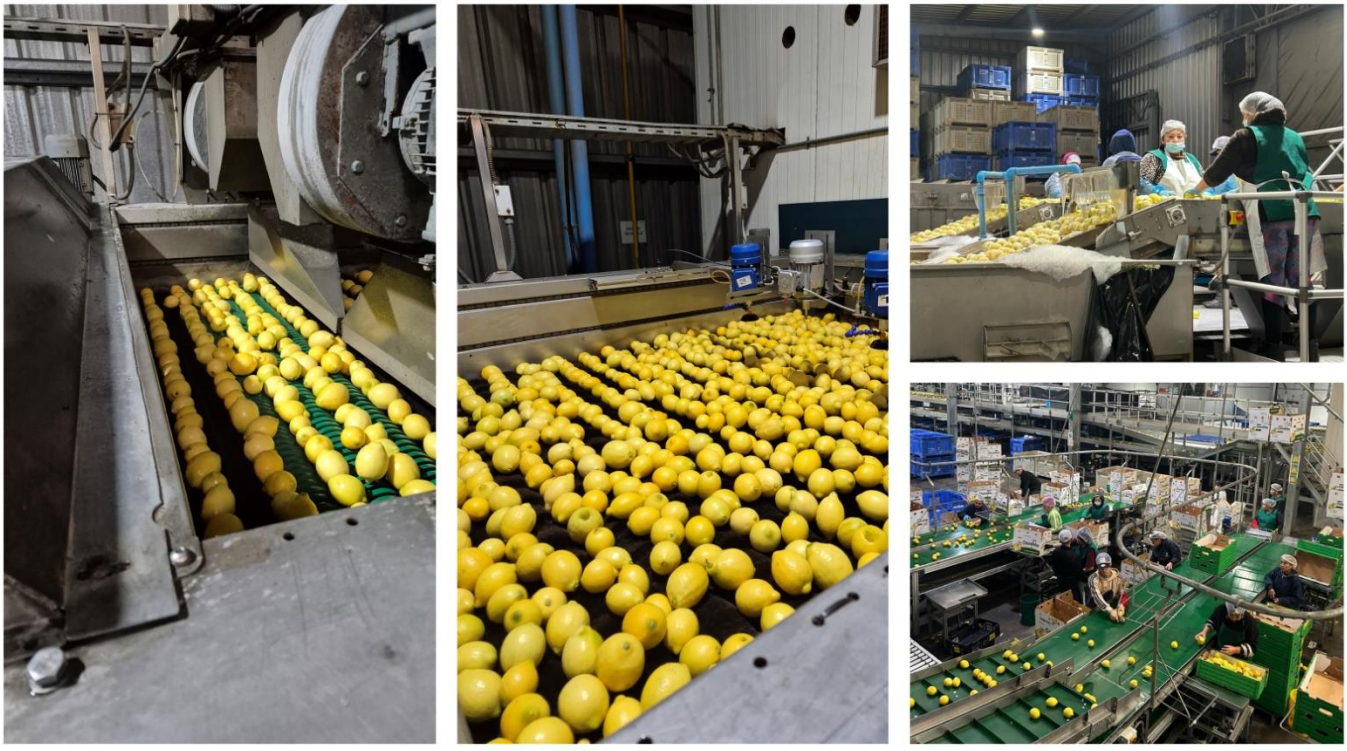
Chile's lemon industry relies primarily on the *Eureka* variety due to its high yields and strong postharvest performance for fresh export markets. Chilean producers also use *Fino 49*, an early-season variety valued for its high acidity and juice content, helping extend the harvest window and maintain supply for fresh consumption and exports. A smaller share of production includes *Genova*, a traditional variety mostly destined for the domestic market. Chile does not use specific lemon varieties for processing; this mainly consists of lower grade lemons that are not suitable for fresh consumption or exports.

Trade:

Chile's lemon exports are projected to grow by 3.8 percent in MY 2025/26, reaching 135,000 MT. This increase reflects the continued expansion of production and the strong demand in international markets. The United States is Chile's largest export destination, accounting for a significant share of export volume. In MY 2023/24, 55 percent of Chile's lemon exports were sent to the United States, highlighting the importance of this market. Other key destinations include Japan, Argentina and South Korea (Table 3).

The export season for Chilean lemons begins in April, with the bulk of shipments occurring between June and September. During this period, international prices are higher than domestic prices, incentivizing producers to prioritize exports. The peak export months are July and August, driven by favorable climatic conditions and strong demand in North America, Europe, and Asia.

Figure 2: Lemon Packing, Ovalle, Coquimbo Region.

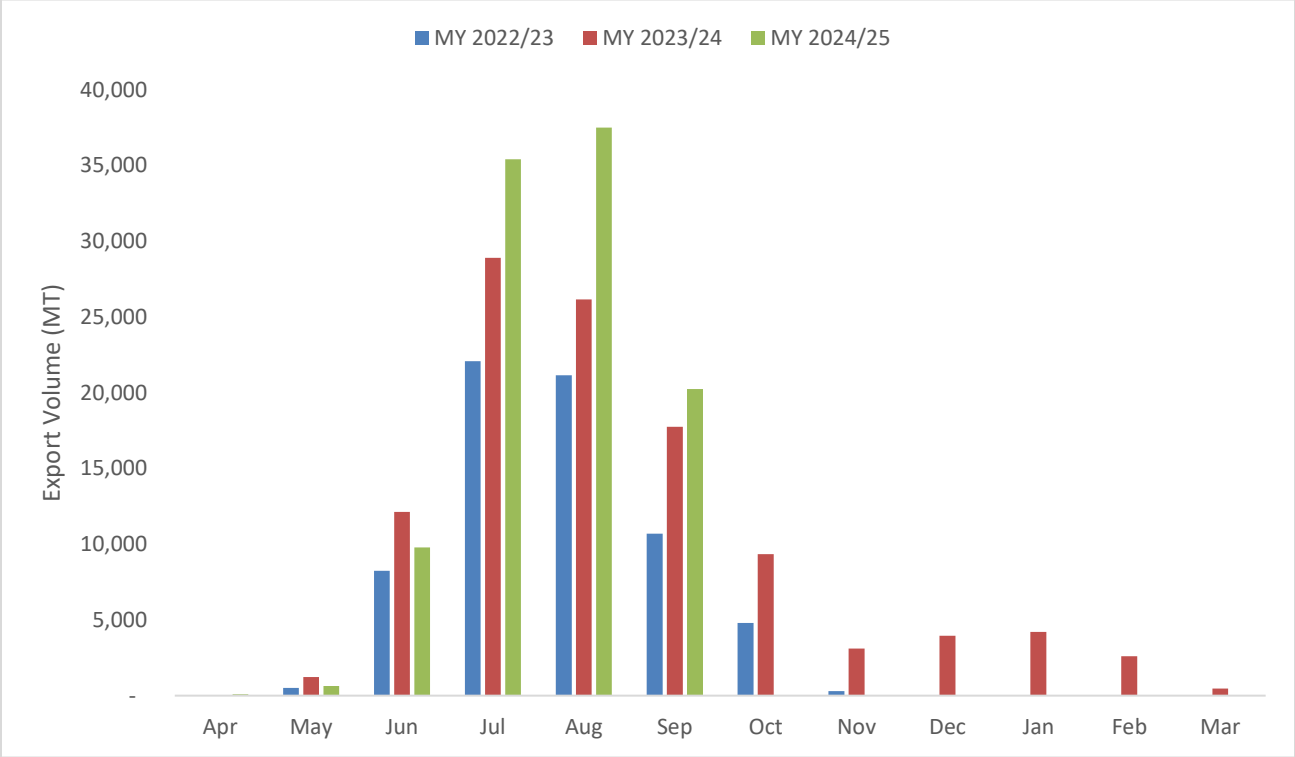


Source: Pictures taken by FAS Santiago during a field visit.

Chile's lemon-packing industry has incorporated a high degree of automation in its sorting and post-harvest processes. Modern packing lines commonly use advanced vision-based inspection systems capable of detecting external defects, calibrating size and color, and ensuring uniform quality standards across large volumes of fruit (Figure 2). These technologies significantly reduce manual labor needs

while improving throughput and minimizing variability in fruit classification. For Chilean exporters automation is especially valuable since it enables tighter control over consistency and traceability which are essential for meeting the phytosanitary and quality requirements of premium markets such as the United States. As Chile's citrus sector expands export volumes, the high level of automation in packing facilities becomes a key competitive advantage, supporting cost efficiency large-scale supply.

Figure 3: Lemon Export Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 3: Lemon and Limes Export Volume to the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
_World	67,794	109,854	62.0%	86,173	103,711	20.4%
United States	41,672	60,407	45.0%	55,979	48,488	-13.4%
Japan	17,076	20,732	21.4%	18,420	15,762	-14.4%
Argentina	0	13,831		0	106	
South Korea	5,593	10,147	81.4%	7,439	7,806	4.9%
Netherlands	1,634	1,775	8.6%	1,707	11,213	556.9%
Austria	288	599	108.0%	599	97	-83.8%
Spain	432	480	11.1%	480	6,341	1221.0%
Italy	576	432	-25.0%	432	2,008	364.8%
Mexico	0	392		294	293	-0.3%
Romania	0	144		144	0	-100.0%
Others	523	915	75.0%	679	11,597	1608.0%

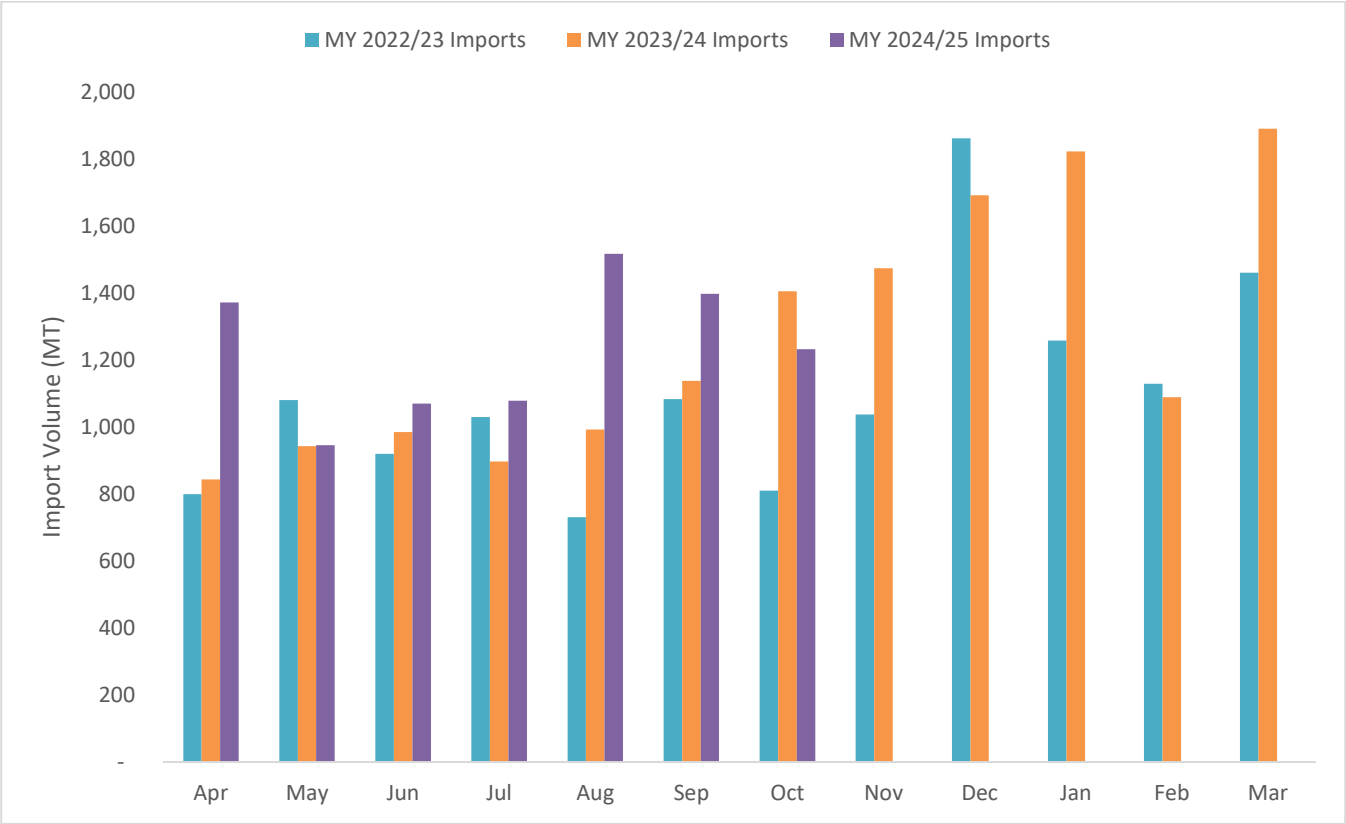
Source: Trade Data Monitor, LLC

In MY 2023/24, Chile imported 15,169 MT of lemons. The top supplier of lemons is Peru, followed by Brazil, Colombia, and the United States (Table 4). Lemon imports from Peru have grown consistently since and represented 75.3 percent of import volume in MY 2023/24.

In MY 2025/26 Chilean imports of lemons are projected at 16,000 MT, which represents 6.8 percent of production and 15.1 percent of domestic consumption. Most of the domestic consumption of lemons is provided by Chilean production, since prices are high enough compared to international prices to attract Chilean suppliers to the Chilean market, especially during the offseason, from November through May.

Chilean imports of lemons are consistent through the year (Figure 4). Lemon consumption increases during the Chilean summer months, driven by higher demand for fresh and refreshing products, particularly for beverages, salads, and culinary uses. During this period, domestic supply is relatively limited, as local production peaks earlier in the year. The combination of stronger seasonal demand and reduced availability results in higher market prices. Imports also tend to increase slightly during this period.

Figure 4: Lemon Import Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 4: Lemon and Limes Import Volume from the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
The World	13,200	15,169	14.9%	5,798	7,380	27.3%
Peru	7,837	11,431	45.9%	4,040	6,185	53.1%
Brazil	4,035	2,760	-31.6%	1,182	1,098	-7.1%
Colombia	1,177	771	-34.5%	575	96	-83.3%
United States	149	141	-5.4%	0	0	
Others	2	66	3200.0%	1	1	0.0%

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Commodities:

Oranges, Fresh

Table 5: Production, Supply and Distribution

Oranges, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	7198	6702	7300	7201	0	7300
Area Harvested (HECTARES)	6500	6500	6800	6800	0	7000
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	186	193	190	200	0	205
Imports (1000 MT)	1	1	1	1	0	1
Total Supply (1000 MT)	187	194	191	201	0	206
Exports (1000 MT)	105	107	105	112	0	115
Fresh Dom. Consumption (1000 MT)	71	76	75	77	0	78
For Processing (1000 MT)	11	11	11	12	0	13
Total Distribution (1000 MT)	187	194	191	201	0	206
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

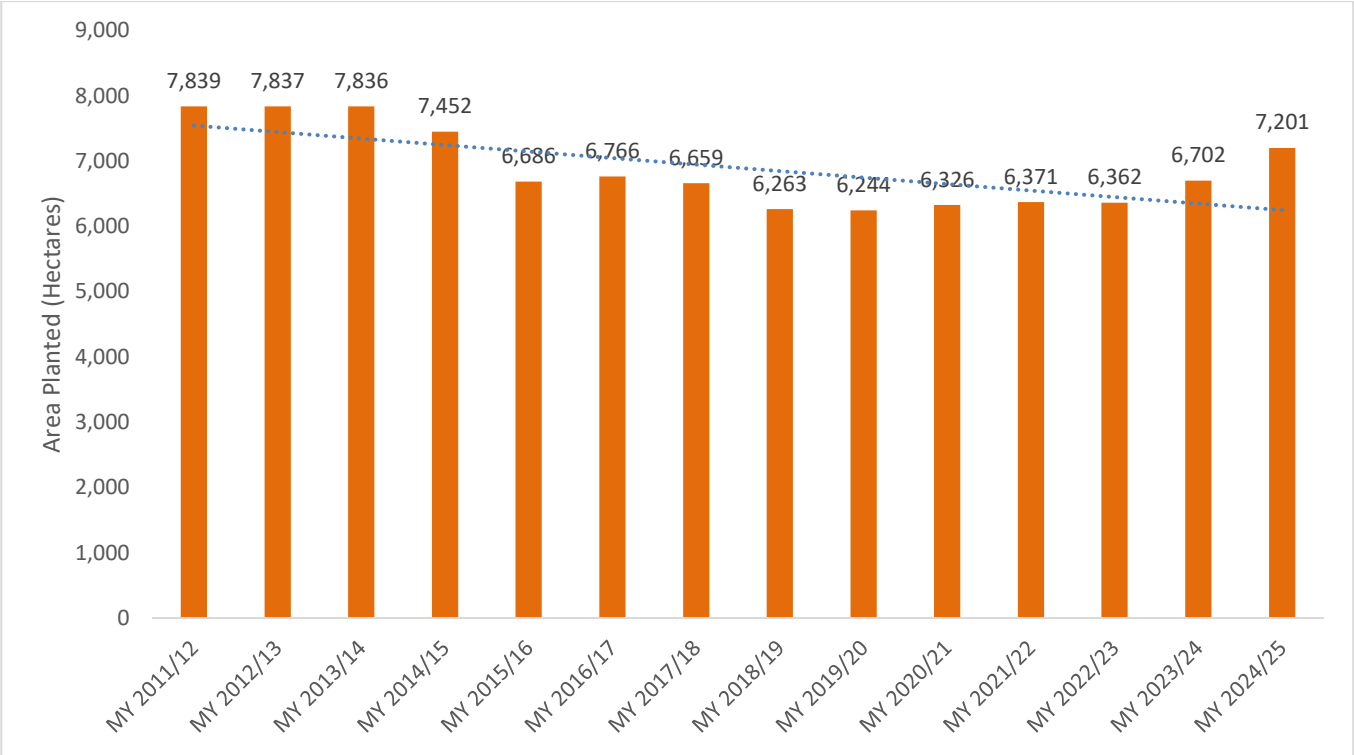
Production:

In MY 2025/26, orange production in Chile is projected to increase by 2.5 percent, reaching 205,000 MT, driven by higher yields and an expansion in area planted to 7,300 hectares (Figure 5).

Metropolitana and *O'Higgins* regions, in the central part of the country, together account for over 70 percent of the area planted with oranges. The *Metropolitana* region is expected to maintain its position as the largest orange-producing region, with a area planted share of 39.7 percent, followed closely by *O'Higgins* at 33.4 percent. These regions benefit from reliable water availability for irrigation, which supports consistent production levels.

In contrast, the *Coquimbo* and *Valparaíso* regions, which hold 8.1 percent and 16.3 percent of the planted area respectively, are expected to see continued declines in orange cultivation due to drought conditions. Producers in these regions are increasingly shifting to lemons, which offer higher profitability.

Figure 5: Oranges Area Planted (hectares)



Source: ODEPA, 2024

Table 6: Orange Area Planted by Region MY 2024/25 (hectares)

Region	Area Planted (ha)	Variation* (%)	Share (%)
Coquimbo	586	-2.9%	8.1%
Valparaíso	1,175	-0.9%	16.3%
Metropolitana	2,857	14.0%	39.7%
O'Higgins	2,402	20.3%	33.4%
Others	180.95	-	2.5%
Total	**7,201**	**13.0%**	**100.0%**

**Variation of planted area is measured every third year; data provided are last available*
Source: Based on data from ODEPA

Consumption:

Domestic consumption of oranges in MY 2025/26 is projected to grow modestly, with fresh domestic consumption reaching 78,000 MT, a 1.3 percent increase compared to the previous marketing year. This increase aligns with the population growth trend and sustained demand for fresh oranges during the Chilean winter months (July–September).

Following the higher production volume, consumption for processing is expected to increase slightly, reaching 13,000 MT, up from 12,000 MT in MY 2024/25. Total domestic consumption (fresh and

processing) will account for 44.4 percent of commercial production, reflecting a steady demand for both fresh oranges and orange juice.

Chile's orange production consists mostly of *Navel* varieties, including *Fukumoto*, an early-season variety valued for its strong color and flavor; *Lane Late*, which extends the season with good postharvest life; and additional Navels such as *Navelate* and *Cara Cara*, known for their sweetness. Chile also produces *Valencia* oranges, which with their thicker rind and balanced flavor are well suited for juice production. While Chile does not cultivate large areas of dedicated processing varieties, the juice industry relies on *Valencia* and on off-grade Navel fruit that does not meet fresh export standards.

Trade:

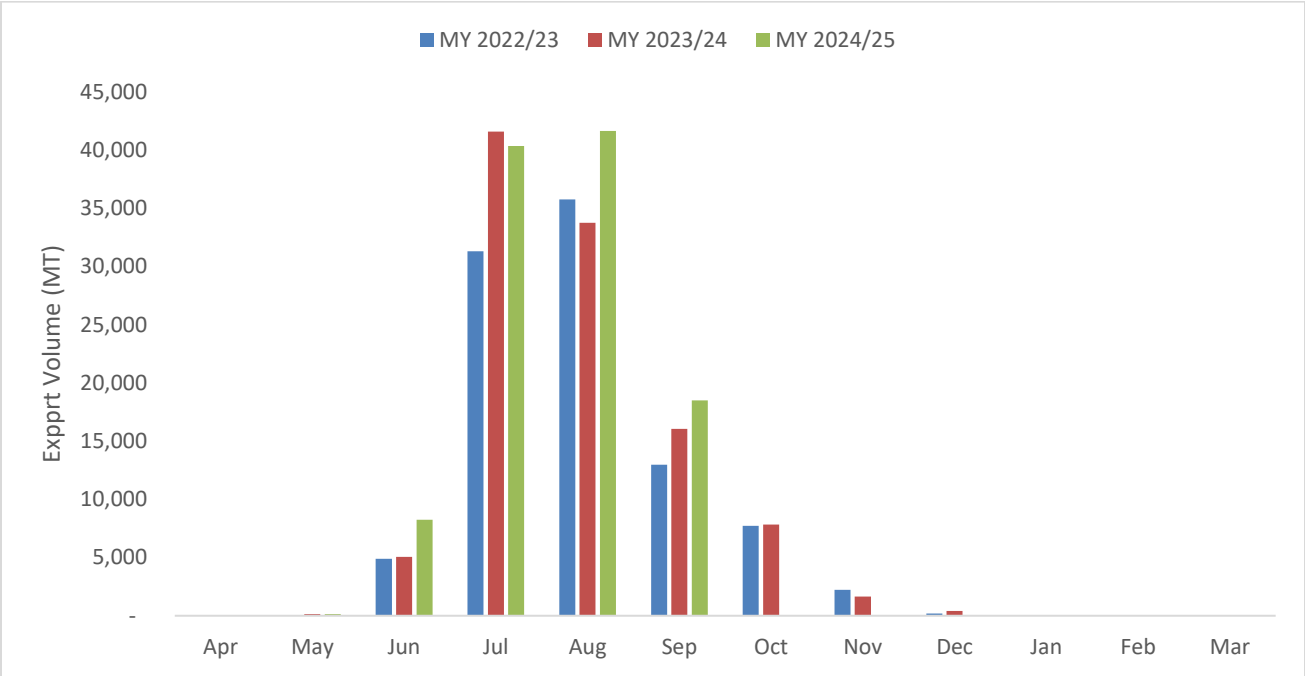
In MY 2025/26, orange exports are projected to grow by 2.7 percent, reaching 115,000 MT, supported by increased production and strong demand from international markets. Chile's export season typically peaks between July and September (Figure 5), with the United States remaining the top export market for Chilean oranges.

Recent data from MY 2024/25 (April–September) shows exports to the United States totaled 102,644 MT, representing 94.2 percent of Chile's total export volume (Table 7). Chile exports oranges to various other countries such as Ecuador, Dominican Republic, and Guatemala.

Orange imports in MY 2025/26 are expected to remain low, with total imports projected at 1,000 MT, consistent with previous years. The United States will continue to be the primary supplier, accounting for nearly all imports (Table 8). Import volumes typically peak during Chile's summer months (December–April), complementing domestic production during the off-season (Figure 7). However, most of the domestic consumption comes from domestic production, limiting the demand for imports.

In Chile, orange imports increase during the summer months (from December to April), when the domestic supply is low (Figure 7). To meet consumption needs during the summer, imports play a complementary role; however, elevated prices tend to moderate overall consumption, reflecting the price sensitivity of the domestic market.

Figure 6: Orange Export Volume by Month (Metric Tons)



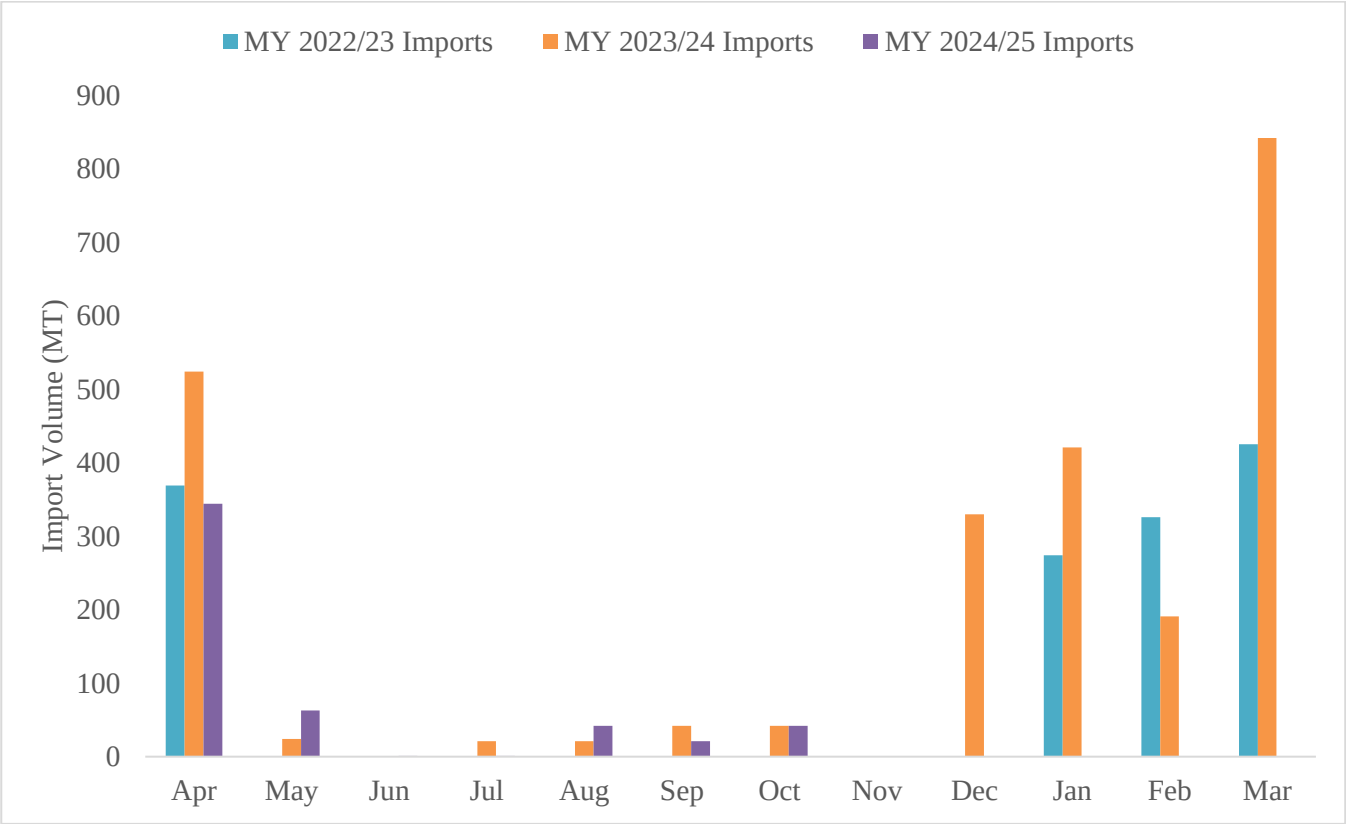
Source: Trade Data Monitor, LLC

Table 7: Orange Export Volume to the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
_World	95,118	106,569	12.0%	96,591	108,921	12.8%
United States	85,461	97,769	14.4%	91,349	102,644	12.4%
Ecuador	1,587	1,768	11.4%	1,088	995	-8.5%
Dominican Republic	1,546	1,748	13.1%	1,147	1,296	13.0%
Guatemala	1,014	1,535	51.4%	1,251	1,272	1.7%
Brazil	1,104	898	-18.7%	224	108	-51.8%
Costa Rica	701	687	-2.0%	348	621	78.4%
Panama	580	595	2.6%	396	503	27.0%
Canada	1,100	453	-58.8%	149	218	46.3%
Colombia	345	336	-2.6%	161	355	120.5%
Peru	290	219	-24.5%	147	210	42.9%
Others	1,390	561	-59.6%	331	699	111.2%

Source: Trade Data Monitor, LLC

Figure 7: Orange Imxport Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 8: Orange Import Volume from the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
The World	1,396	2,458	76.1%	632	473	-25.2%
United States	1,395	2,331	67.1%	548	408	-25.5%
Argentina	0	126		84	63	-25.0%
Others	1	1	0.0%	0	2	

Source: Trade Data Monitor, LLC

Policy:

Chilean orange exports now enter the United States at a 0 percent tariff.

Commodities:
Tangerines/Mandarins, Fresh

Table 9: Production, Supply and Distribution

Tangerines/Mandarins, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	12404	11835	12700	12405	0	12900
Area Harvested (HECTARES)	11800	11800	12200	12200	0	12500
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	221	217	250	262	0	270
Imports (1000 MT)	1	1	1	1	0	0
Total Supply (1000 MT)	222	218	251	263	0	270
Exports (1000 MT)	191	187	218	230	0	235
Fresh Dom. Consumption (1000 MT)	28	28	30	30	0	32
For Processing (1000 MT)	3	3	3	3	0	3
Total Distribution (1000 MT)	222	218	251	263	0	270
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Estimates

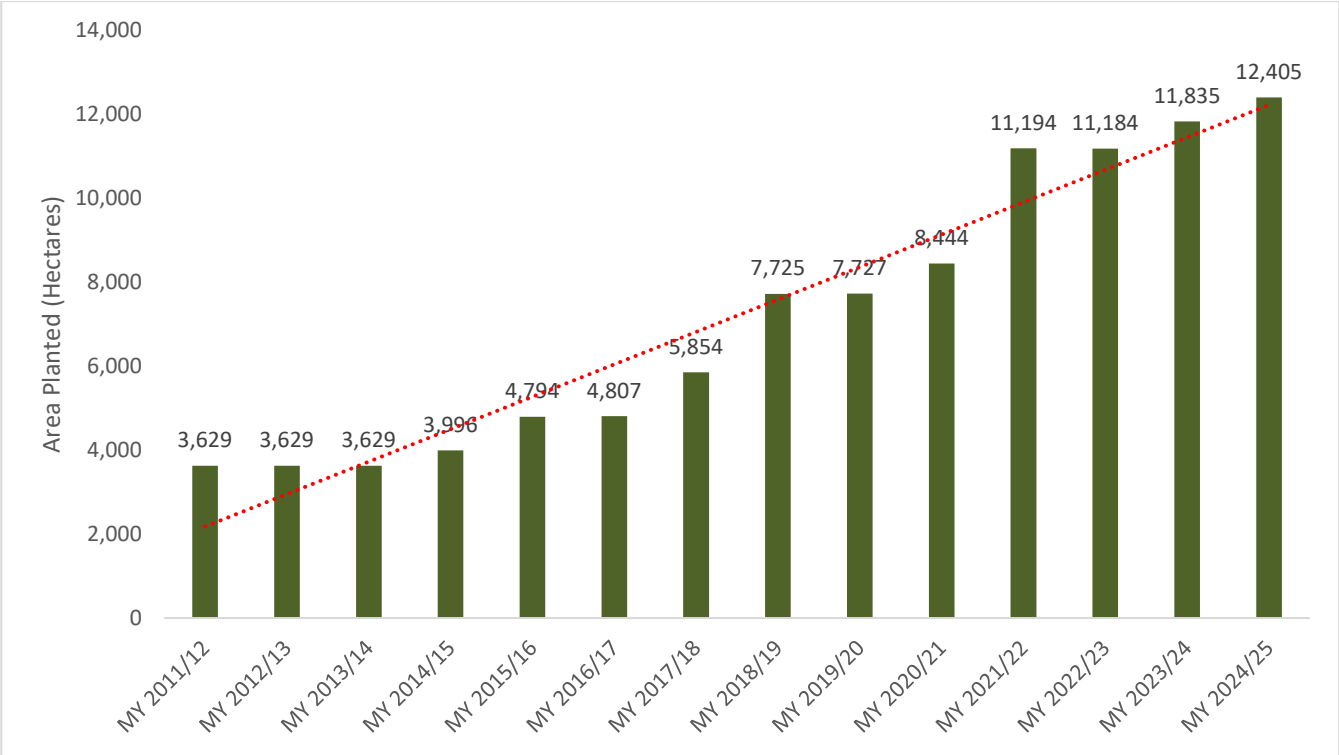
Production:

In MY 2025/26, post projects Chilean tangerine/mandarin production will rise by 3.1 percent, reaching 270,000 metric tons (MT). This increase reflects an expansion in the area planted, which will increase to 12,900 hectares, and continued high yields in key production regions.

Mandarins remain a profitable crop for producers in the *Metropolitana*, *O'Higgins*, and *Valparaíso* regions. Producers in *Valparaíso* have increasingly shifted from avocados, which are very sensitive to low temperatures and humidity, to mandarins due to the crop's adaptability to the terrain and climate. Many of these crops now use drip irrigation on hillsides to optimize production.

However, drought will continue to challenge production in the *Coquimbo* region, which accounts for 42.2 percent of the area planted (Table 11). Persistent water shortages have limited growth, and over the past three years, the area planted in Coquimbo has decreased by 1.3 percent. Despite these challenges, production in other regions will offset the impact of drought in Coquimbo.

Figure 8: Mandarin Area Planted (hectares)



Source: ODEPA, 2025

Table 11: Tangerine/Mandarin Area Planted by Region MY 2024/25 (hectares)

Region	Area Planted (ha)	Variation* (%)	Share (%)
Coquimbo	5,240	-1.3%	42.2%
Valparaíso	2,576	11.0%	20.8%
Metropolitana	1,402	39.5%	11.3%
O'Higgins	3,000	22.2%	24.2%
Others	188		1.5%
Total	**12,405**	**10.8%**	**100.0%**

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

Source: Based on data from ODEPA

Consumption:

In MY 2025/26, fresh domestic consumption will grow by 6.7 percent, reaching 32,000 MT, as higher production boosts availability and competitive prices sustain demand during the harvest season, which spans from May to September.

Mandarin consumption for processing will remain stable at 3,000 MT, with most processed mandarins used for juice production. Total domestic consumption (fresh and processing) will account for 12.9 percent of total supply in MY 2025/26.

W. Murcott stands as Chile's top mandarin variety, delivering high yields, consistent quality, and strong export performance. In recent seasons, producers have incorporated other varieties, such as *Orogrande*, *Clemenules*, and *Tango*, to diversify their harvest calendar and strengthen competitiveness, especially as they pursue new market opportunities.

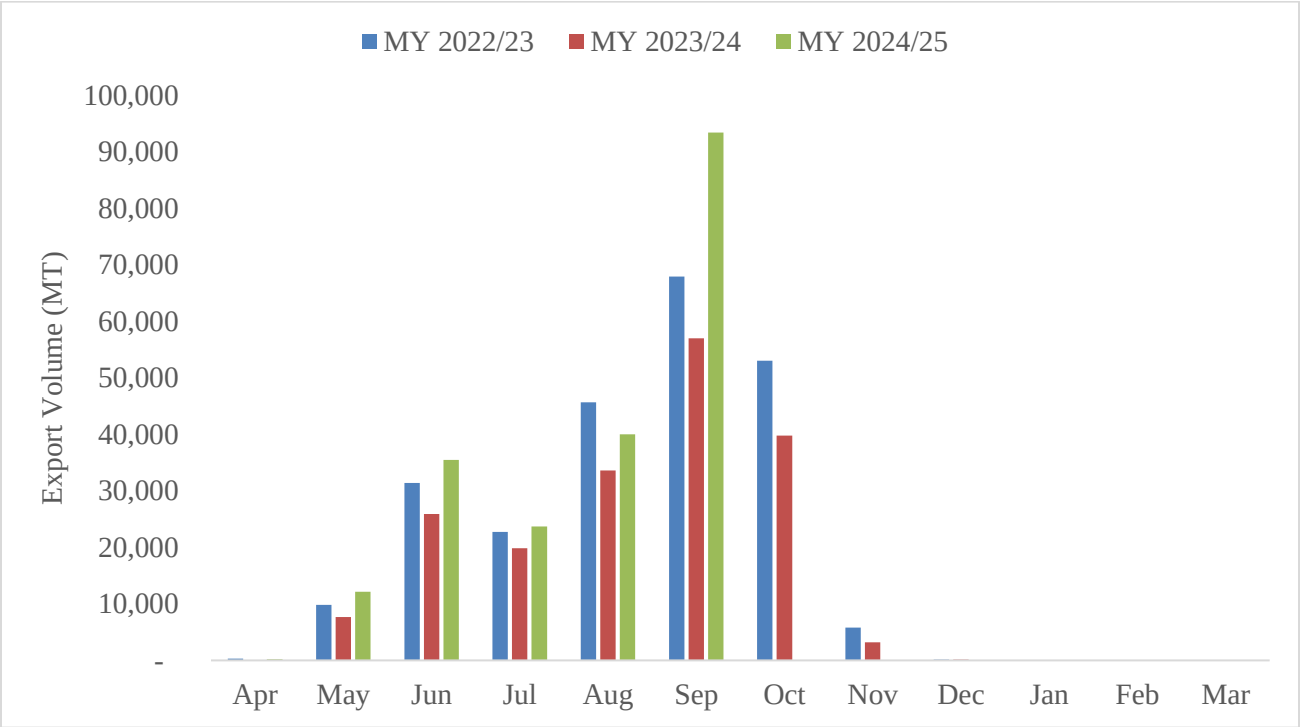
Trade:

Chile will increase mandarin exports by 2.2 percent in MY 2025/26, reaching 235,000 MT. Higher production and strong demand from international markets will support this increase in exports. Chile's export season runs from May to December, with peak shipments occurring in September (Figure 9).

In MY 2024/25, due to the increase in production, Post estimates that exports will increase by 23 percent totaling 223,000 metric tons. The United States will remain Chile's largest export market, receiving the majority of mandarin exports. Data from MY 2024/25 (April–September) shows that Chile shipped 196,343 MT of mandarins to the United States, representing 95.8 percent of total export volume (Table 12). Other key markets for Chilean mandarins are Mexico, Puerto Rico and the United Kingdom.

In MY 2025/26, Post expects no significant changes in mandarin imports. Chile's import volume has historically stayed below 1,000 MT per year, and it is primarily sourced from the United States and Peru. Recent data from MY 2024/25 (April–September) shows imports totaled 93 MT, a 55.7 percent decrease compared to the same period in the previous marketing year (Table 13).

Figure 9: Tangerine/Mandarin Export Volume by Month (Metric Tons)



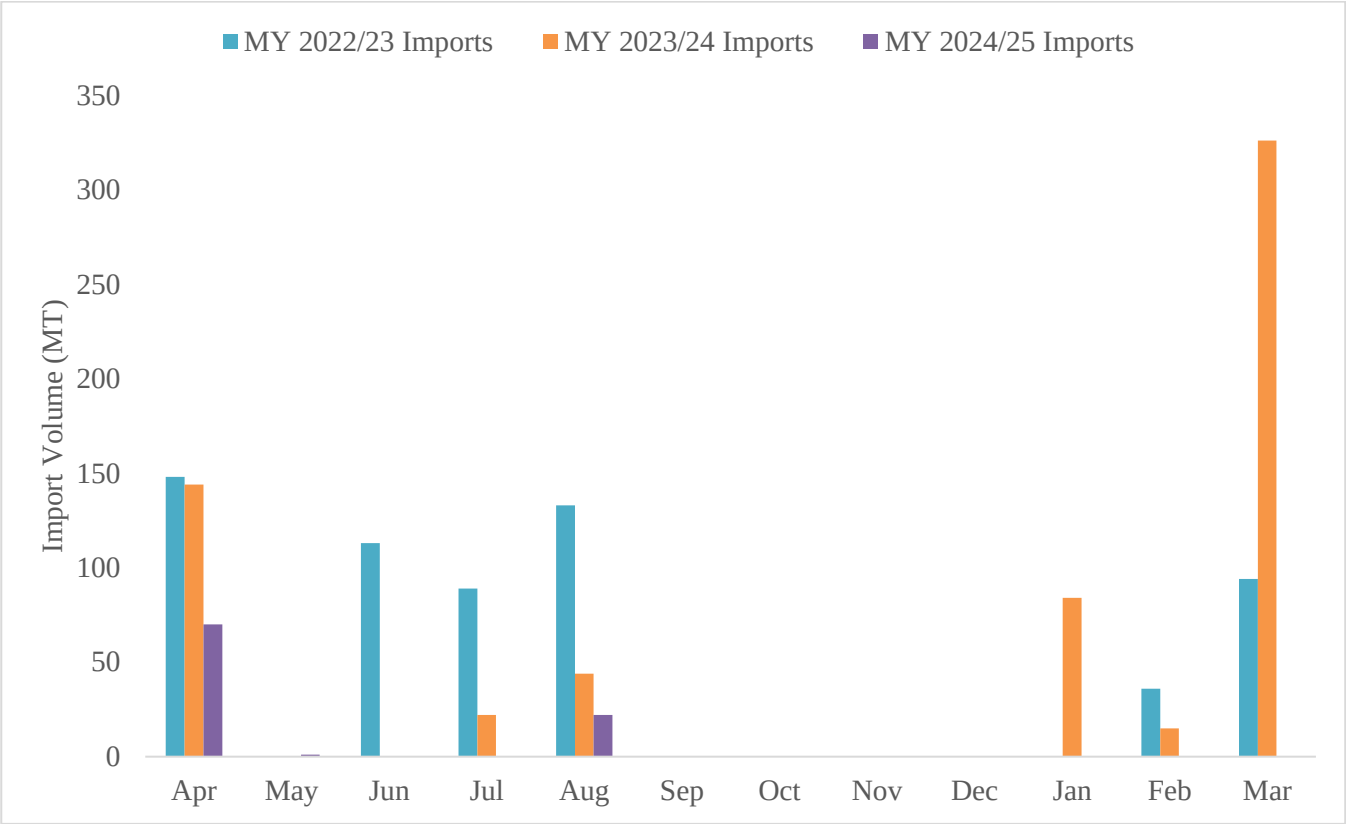
Source: Trade Data Monitor, LLC

Table 12: Tangerine/Mandarin Export Volume to the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
_World	236,907	187,120	-21.0%	144,017	204,944	42.3%
United States	223,532	178,806	-20.0%	139,859	196,343	40.4%
Mexico	1,802	2,622	45.5%	1,250	2,912	133.0%
Puerto Rico	1,072	1,139	6.3%	846	839	-0.8%
United Kingdom	756	819	8.3%	155	952	514.2%
Dominican Republic	747	756	1.2%	230	797	246.5%
Canada	2,418	552	-77.2%	238	968	306.7%
Brazil	316	496	57.0%	262	136	-48.1%
Spain	1,805	321	-82.2%	300	265	-11.7%
Netherlands	1,084	233	-78.5%	188	820	336.2%
Japan	208	231	11.1%	231	78	-66.2%
Others	3,167	1,145	-63.8%	458	834	82.1%

Source: Trade Data Monitor, LLC

Figure 10: Tangerine/Mandarin Import Volume by Month (Metric Tons)



Source: Trade Data Monitor, LLC

Table 13: Tangerine/Mandarin Import Volume from the World (MT)

Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	Apr 24 - Sep 24 (MT)	Apr 25 - Sep 25 (MT)	Variation (%)
The World	613	635	3.6%	210	93	-55.7%
United States	277	569	105.4%	144	71	-50.7%
Peru	177	66	-62.7%	66	22	-66.7%
Others	159	0	-100.0%	0	0	

Source: Trade Data Monitor, LLC

Policy:

No policy changes since the last GAIN report.

Attachments:

No Attachments