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Report Name: Fresh Deciduous Fruit Annual

Country: Chile

Post: Santiago

Report Category: Fresh Deciduous Fruit

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Report Highlights:

In Marketing Year (MY) 2025/26, Post estimates that table grape production in Chile will decline by 5.6 percent, totaling 675,000 metric tons (MT), reflecting ongoing challenges such as reduced planted area and tight profits. Exports are projected to decrease by 5.7 percent, reaching 525,000 MT. For apples, MY 2025/26 production is forecast at 940,000 MT, a 2.3 percent decrease from the previous year, primarily due to reduced area planted. Apple exports are expected to reach 553,000 MT, representing a 3.8 percent decrease. Chile's MY 2025/26 fresh pear production is projected to decline by 2.4 percent, totaling 202,000 MT, with pear exports expected to decrease by 2.7 percent to 107,000 MT.

Commodities:
Grapes, Table, Fresh

Table 1: Production, Supply and Distribution:

Grapes, Fresh Table	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	39931	39931	39000	33155	0	32500
Area Harvested (HA)	39500	39500	38500	32000	0	31500
Commercial Production (MT)	678200	678200	723000	710000	0	670000
Non-Comm. Production (MT)	5000	5000	5000	5000	0	5000
Production (MT)	683200	683200	728000	715000	0	675000
Imports (MT)	300	300	300	300	0	300
Total Supply (MT)	683500	683500	728300	715300	0	675300
Fresh Dom. Consumption (MT)	155000	155000	158300	158300	0	150300
Exports (MT)	528500	528500	570000	557000	0	525000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	683500	683500	728300	715300	0	675300
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

Production:

In MY 2025/26, Post estimates that table grape production will decline by 5.6 percent, totaling 675,000 MT. This decrease reflects ongoing challenges in the sector, including reduced planted and harvested areas, lower yields, and persistent economic pressures.

The decline in production is primarily attributed to reduction in planted area (Figure 1). The area planted with table grapes is projected to decrease to 32,500 hectares, a 1.98 percent drop compared to MY 2024/25. This decrease reflects the continued shift away from table grape cultivation due to narrow profits and competition from other crops.

Chilean table grape producers face intense competition from Peruvian grapes in key export markets, particularly the United States. Rising competition from Peru is driven by major tax cuts and a planned US$24 billion investment in irrigation, infrastructure, and export promotion over the next 15 years. Moreover, low prices for traditional varieties such as Crimson, Flame, and Red Globe continue to challenge profitability, forcing smaller exporters out of the market.

Chile's table grape industry continues to face significant challenges that vary by region, with declining planted areas across all major production zones (Table 2). In major production regions like *O'Higgins*, *Metropolitana*, and *Valparaíso*, table grape orchards are increasingly being replaced by more profitable crops such as walnuts, cherries, and citrus. Urban expansion also contributes to the reduction in the area planted with table grapes.

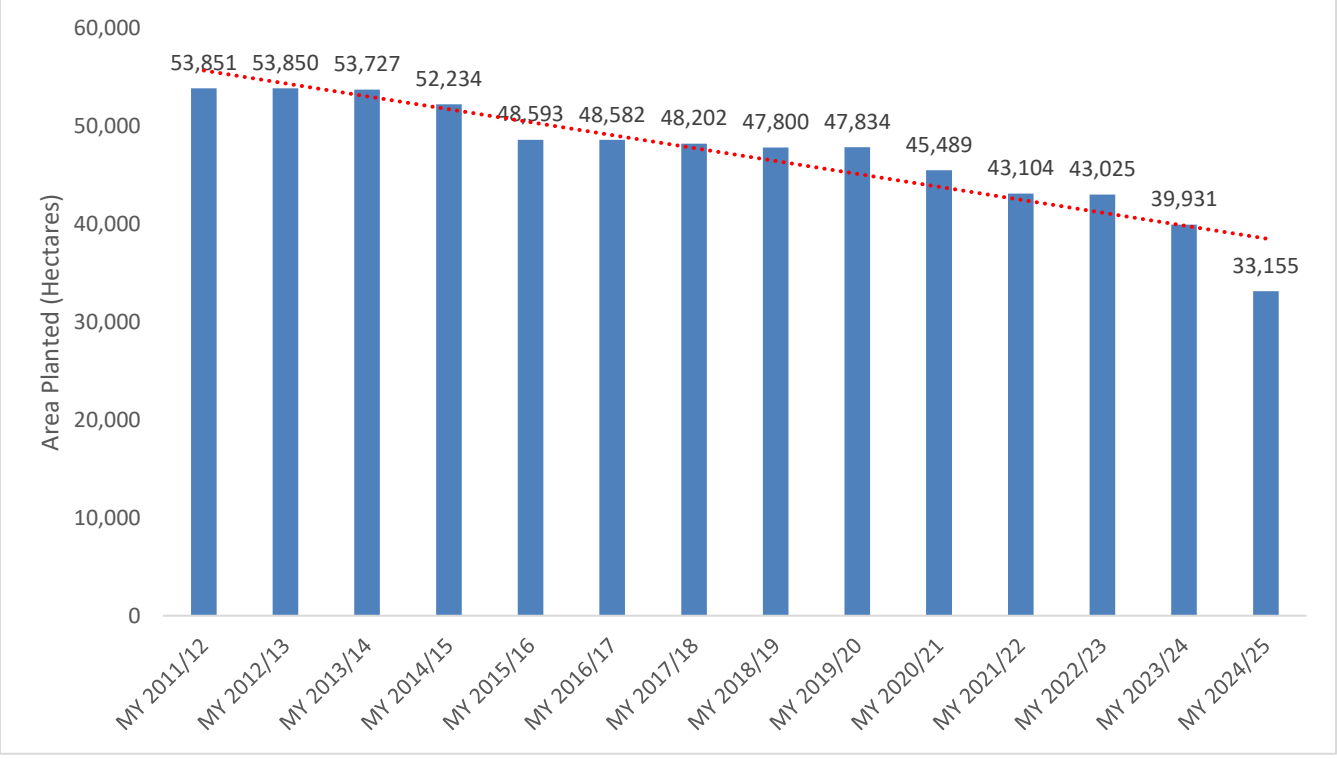
Grapes from *Atacama* face intense competition from Peruvian grapes in the U.S. market, which are often priced lower due to Peru's lower labor costs and newer infrastructure. This competition has driven prices down, making it increasingly difficult for Atacama producers to remain profitable.

Water scarcity is another critical issue in *Atacama* region, as table grape production requires significant irrigation. Producers are struggling to balance water availability with rising costs, further contributing to the decline in planted area.

The *Coquimbo* region, located just south of *Atacama*, is known for its mid-season table grape varieties. While the decline in planted area there is less severe than in other regions, producers still face rising input costs and low export prices for traditional varieties.

Coquimbo's proximity to *Atacama* means it shares similar challenges related to water availability and competition from Peruvian grapes. Producers in *Coquimbo* are increasingly exploring new grape varieties that are more resistant to climatic stress and have higher market demand. However, transitioning to these varieties requires significant investment, which smaller producers may struggle to afford.

Figure 1: Table Grape Area Planted (Hectares)



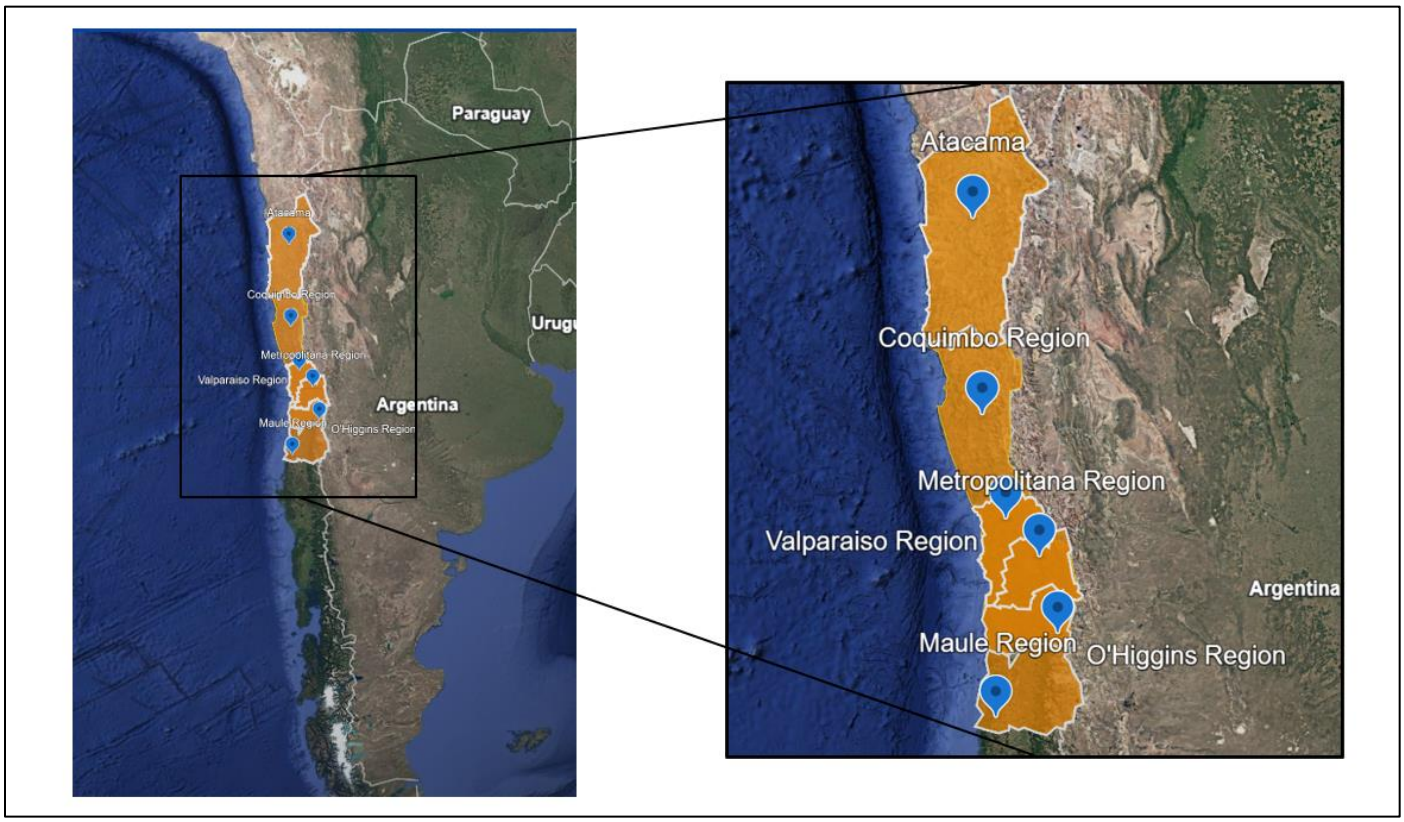
Source: ODEPA, 2025

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

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Atacama	5,987	-12.4%	15.0%
Coquimbo	7,321	-10.3%	18.3%
Valparaiso	8,413	-15.6%	21.1%
Metropolitana	5,310	-22.5%	13.3%
O'Higgins	12,736	-5.2%	31.9%
Maule	163	-32.3%	0.4%
Others	1		
Total	**39,931**	**-22.9%**	**100.0%**

Note: Variation of area planted is measured every three years; data provided are the latest available
Source: Based on data from ODEPA, 2024

Map 1. Table Grape Production Regions in Chile



Source: Google Earth

Policy:

On July 19, 2024, USDA published the final notice to allow table grape exports using the systems approach protocol for six Chilean growing regions: *Arica* and *Parinacota, Tarapaca, Antofagasta, Atacama, Coquimbo,* and *Valparaiso*. (Note: Only *Atacama, Coquimbo,* and *Valparaiso* have commercial production) These areas were identified as areas of Chile where European grapevine moth (*Lobesia botrana*) is either absent or at a low prevalence. Under the protocol, grape orchards must be free from European grapevine moth and have low prevalence of the Chilean false red mite (*Brevipalpus chilensis*). Systems approach was implemented for the first time on MY 2024/25. In that first implementation year, six percent of the total number of cases exported to the United States was sent using systems approach and the remainder was fumigated with methyl bromide.

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 USDA Animal and Plant Health Inspection Service (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.

Consumption:

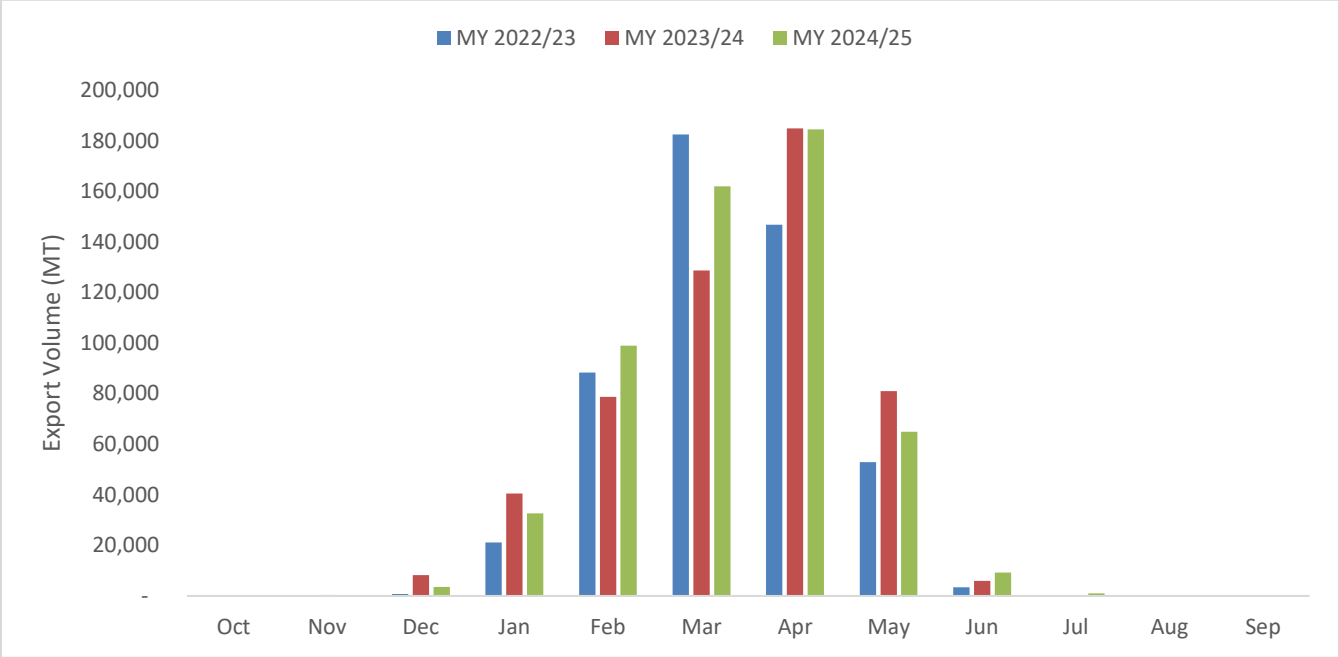
In MY 2025/26, domestic consumption of fresh table grapes in Chile is projected to decline to 150,300 MT, representing a 5.1 percent decrease compared to the previous marketing year. The overall decline in table grape production directly impacts the availability of fresh grapes for domestic consumption. With fewer grapes produced, a larger share is likely to be allocated to exports, leaving less supply for the domestic market.

Trade:

In MY 2025/26, exports are projected to decline to 525,000 MT, a 5.7 percent reduction compared to MY 2024/25. The top markets for Chilean table grape exports are the United States, China, the Netherlands, and the United Kingdom.

The United States, Chile's largest export destination, saw a sharp increase of 30.3 percent in MY 2023/24, reaching 325,533 MT, driven by strong demand (Table 3). However, year-to-date exports from October 2024 to August 2025 declined by 8.2 percent, totaling 298,894 MT, signaling potential challenges such as increased competition from other suppliers. In contrast, exports to China, which had dropped by 46.7 percent in MY 2023/24, rebounded by 15.7 percent in year-to-date exports, reaching 35,126 MT, suggesting a partial recovery in demand. Similarly, exports to the Netherlands surged by 53.8 percent in year-to-date exports, reflecting renewed interest in the European market.

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



Source: Trade Data Monitor, LLC

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

Partner Country	Marketing Year			Year to Date		
	2022/23 (MT)	2023/24 (MT)	Variation (%)	Oct 23- Aug 24 (MT	Oct 24- Aug 25 (MT	Variation (%)
The World	496,321	528,521	6.5%	528,516	556,968	5.4%
United States	249,782	325,533	30.3%	325,533	298,894	-8.2%
China	56,928	30,347	-46.7%	30,347	35,126	15.7%
Netherlands	31,076	26,910	-13.4%	26,910	41,386	53.8%
United Kingdom	21,676	19,745	-8.9%	19,745	21,551	9.1%
Canada	10,089	16,461	63.2%	16,461	16,689	1.4%
Mexico	11,344	13,808	21.7%	13,808	16,075	16.4%
Japan	13,457	12,242	-9.0%	12,242	11,154	-8.9%
South Korea	16,491	10,780	-34.6%	10,780	14,507	34.6%
Spain	12,282	10,000	-18.6%	10,000	14,441	44.4%
Ecuador	8,537	9,698	13.6%	9,692	8,778	-9.4%
Others	64,659	52,997	-18.0%	52,998	78,367	47.9%

Source: Trade Data Monitor, LLC

Commodities:

Apples, Fresh

Table 4: Production, Supply and Distribution

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	29006	29006	28000	24994	0	23000
Area Harvested (HA)	28500	28500	27000	24000	0	22000
Bearing Trees (1000 TREES)	32500	32500	31500	29000	0	27000
Non-Bearing Trees (1000 TREES)	2000	2000	1800	1500	0	1300
Total Trees (1000 TREES)	34500	34500	33300	30500	0	28300
Commercial Production (MT)	904000	927996	910000	952000	0	930000
Non-Comm. Production (MT)	10000	10000	10000	10000	0	10000
Production (MT)	914000	937996	920000	962000	0	940000
Imports (MT)	3000	3000	3000	3000	0	3000
Total Supply (MT)	917000	940996	923000	965000	0	943000
Domestic Consumption (MT)	387000	387000	388000	390000	0	390000
Exports (MT)	530000	553996	535000	575000	0	553000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	917000	940996	923000	965000	0	943000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

Production:

In MY 2025/26, the area planted with apples is projected to decline to 23,000 hectares, continuing the downward trend observed over the past decade. This represents a 7.9 percent decrease compared to MY 2024/25. The decline in area planted reflects the ongoing shift away from apple production due to low profitability and competition from alternative crops.

Total apple production in MY 2025/26 is forecast at 940,000 MT, a 2.3 percent decrease from MY 2024/25 estimate of 962,000 MT. This decline results from both a reduction in planted area and the gradual aging of Chile's apple orchards, which has lowered productivity. However, favorable climatic conditions, including sufficient rainfall and chill hours, are expected to support yields and partially offset the decline in production area.

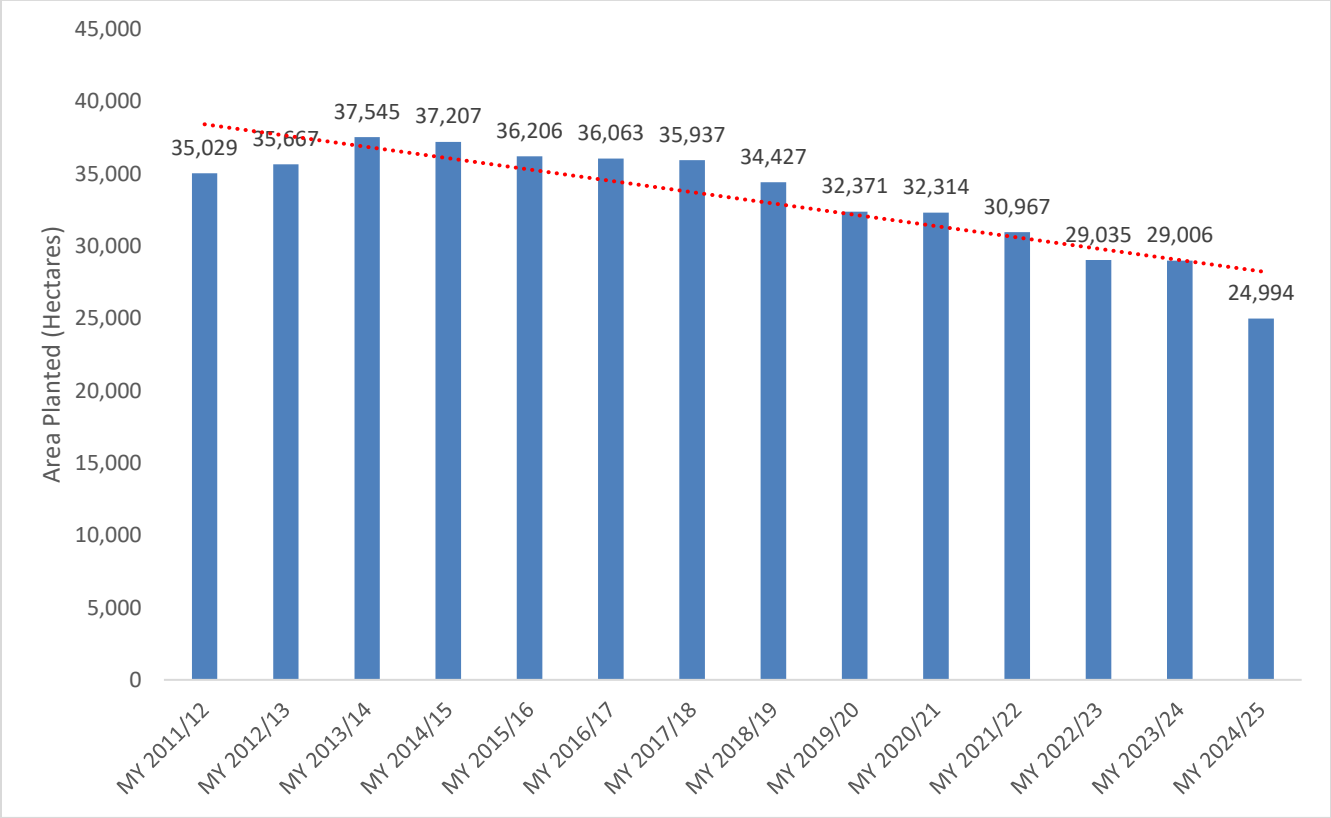
Chile's apple industry is dominated by traditional varieties such as Royal Gala, Fuji, and Granny Smith, but the most competitive producers are transitioning to newer, high-demand varieties. These include Brookfield Gala, Pink Lady, Rosy Glow, Ambrosia, Envy, Modi, and Buckeye, which offer better marketability and higher returns. 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.

The total area planted with apples in Chile during MY 2024/25 is estimated at 24,994 hectares, reflecting a 13.9 percent decline over the past three years. This reduction responds to the ongoing challenges faced by apple producers, including low profitability, competition from alternative crops, and

aging orchards. The *Maule* region, Chile's top apple-producing area, accounts for 61.6 percent of the total planted area, but it has experienced a 15.0 percent decrease in planted hectares over the same period. Similarly, the *O'Higgin*s region, which represents 19.6 percent of the total, saw a sharp decline of 23.4 percent in planted area. In these regions, producers are shifting away from apple production in favor of more profitable crops such as cherries and walnuts.

In contrast, the *La Araucanía* region stands out as the only major apple-producing area to show growth, with a 11.3 percent increase in planted area, now accounting for 12.6 percent of the apple total area planted. This growth reflects the region's potential as an emerging production zone, likely driven by favorable climatic conditions and lower production costs compared to central regions.

Figure 3: Apple Area Planted (Hectares)



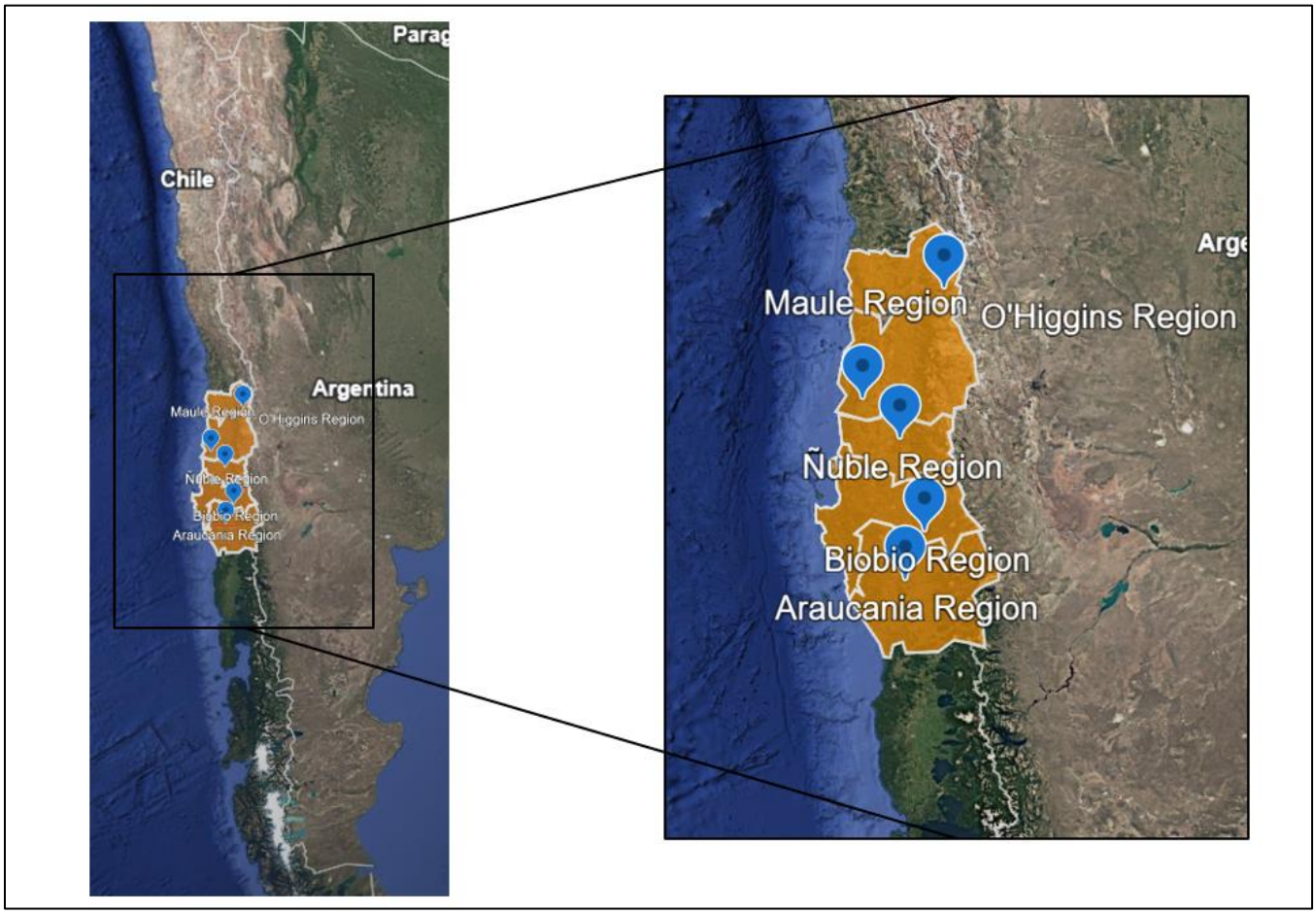
Source: ODEPA, 2025

Table 5: Apple Area Planted by Region MY 2024/25 (Hectares)

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Valparaiso	140	-2.7%	0.6%
Metropolitana	58	-30.1%	0.2%
O'Higgins	4,894	-23.4%	19.6%
Maule	15,386	-15.0%	61.6%
Ñuble	800	-7.0%	3.2%
Biobio	536	-8.2%	2.1%
La Araucania	3,154	11.3%	12.6%
Others	26		0.1%
Total	**24,994**	**-13.9%**	**100.0%**

Note: Variation of planted area is measured every three years; data provided are last available
Source: ODEPA, 2025

Map 2: Apple Production Regions in Chile



Source: Google Earth

Policy:

No new policy developments to report.

Consumption:

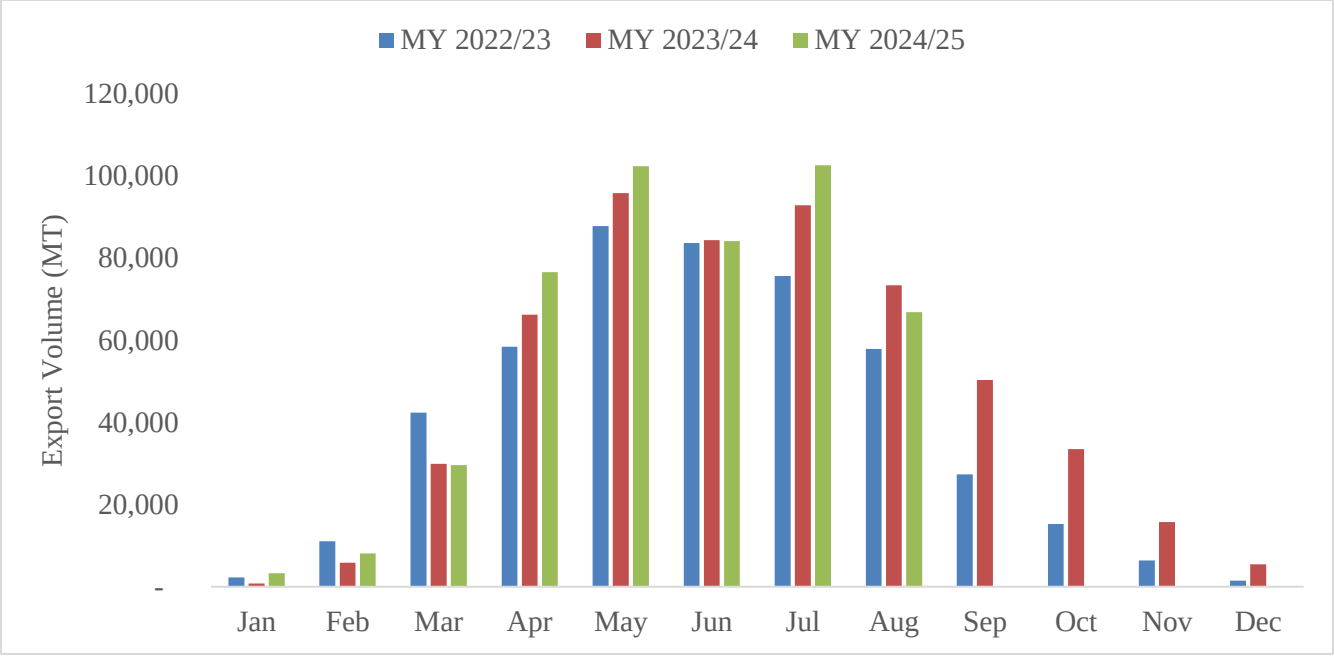
In MY 2025/26, Chilean consumers will maintain their demand for apples (both fresh and processed) at around 390,000 metric tons, which accounts for 41.9 percent of commercial apple production. Stable demand for both fresh and processed apples, which remain staples in the Chilean diet, will keep domestic consumption steady. The domestic market absorbs a significant share of production and acts as a buffer against external market pressures.

Although export markets dominate Chilean apple production, the processing industry complements the sector by utilizing fruit that does not meet export quality standards. Processors use approximately 15–20 percent of total apple production, mainly consisting of lower-grade or smaller fruit diverted from the fresh export market. They process these apples into juice concentrate, purées, and dehydrated products.

Trade:

Chilean apple exports are projected to reach 553,000 MT in MY 2025/26, a 3.8 percent decrease from the previous year's estimate of 575,000 MT. The decline in export volumes reflects reduced production and increasing competition in global markets. Chilean exporters face pressure to remain competitive by focusing on preferred apple varieties that meet international demand for high productivity, color, taste, and condition.

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



Source: Trade Data Monitor, LLC

In MY 2023/24, Brazil emerged as the top destination for Chilean apple exports, accounting for 20.5 percent of total export volume, surpassing Colombia. Exports to Brazil increased by 115.3 percent, reaching 113,502 MT. However, in MY 2024/25 (January to August data), exports to Brazil declined by 18.9 percent, totaling 65,093 MT, indicating potential market saturation. Despite this decline, Brazil remains the top market for Chilean apples.

Colombia, which represented 13.6 percent of Chilean apple exports in MY 2023/24, saw a 15.8 percent increase in export volume, reaching 75,111 MT. In MY 2025 (January–August), exports to Colombia continued to grow, increasing by 10.9 percent to 62,459 MT, solidifying its position as a key market.

Table 6: Apple Export Volume to the World (MT)

Partner Country	Marketing Year			January-August		
	2022/23 (MT)	2023/24 (MT)	Variation (%)	Jan 2024 - Aug 2024 (MT)	Jan 2025 - Aug 2025 (MT)	Variation (%)
_World	469,304	553,996	18.0%	449,093	473,401	5.4%
Brazil	52,724	113,502	115.3%	80,288	65,093	-18.9%
Colombia	64,847	75,111	15.8%	56,296	62,459	10.9%
Ecuador	38,357	42,536	10.9%	32,071	36,309	13.2%
Taiwan	23,567	30,013	27.4%	28,149	29,522	4.9%
Saudi Arabia	21,256	28,158	32.5%	27,890	32,165	15.3%
India	16,483	27,107	64.5%	26,976	32,404	20.1%
Peru	37,207	26,253	-29.4%	15,208	11,580	-23.9%
United States	46,360	25,152	-45.7%	24,527	30,652	25.0%
Netherlands	19,171	22,221	15.9%	20,764	21,370	2.9%
Germany	14,197	20,217	42.4%	18,682	22,021	17.9%
Others	135,135	143,726	6.4%	118,242	129,826	9.8%

Source: Trade Data Monitor, LLC

Commodities:
Pears, Fresh

Table 7: Production, Supply and Distribution

Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	5791	5791	5700	5045	0	4800
Area Harvested (HA)	5700	5700	5600	5600	0	4700
Bearing Trees (1000 TREES)	5800	5800	5500	5500	0	5000
Non-Bearing Trees (1000 TREES)	1000	1000	1000	1000	0	900
Total Trees (1000 TREES)	6800	6800	6500	6500	0	5900
Commercial Production (MT)	200000	204609	205000	205000	0	200000
Non-Comm. Production (MT)	2000	2000	2000	2000	0	2000
Production (MT)	202000	206609	207000	207000	0	202000
Imports (MT)	800	800	700	700	0	800
Total Supply (MT)	202800	207409	207700	207700	0	202800
Domestic Consumption (MT)	97800	97800	97700	97700	0	95800
Exports (MT)	105000	109609	110000	110000	0	107000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	202800	207409	207700	207700	0	202800
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

Production:

In MY 2025/26, Chile's fresh pear production is projected to decline slightly to 202,000 MT, a 2.4 percent decrease compared to the previous year's estimate of 207,000 MT. This reduction reflects the ongoing decline in the area planted, which is expected to fall to 4,800 hectares, a 4.9 percent decrease from MY 2024/25. Despite the decline in production, Chile's pear industry remains focused on maintaining export volumes, which are projected at 107,000 MT in MY 2025/26, a 2.7 percent decrease from the previous year.

The decline in pear production is part of a long-term trend, with the area planted decreasing annually since MY 2016/17. This trend is driven by persistently low profit margins, which have discouraged investment in pear orchards.

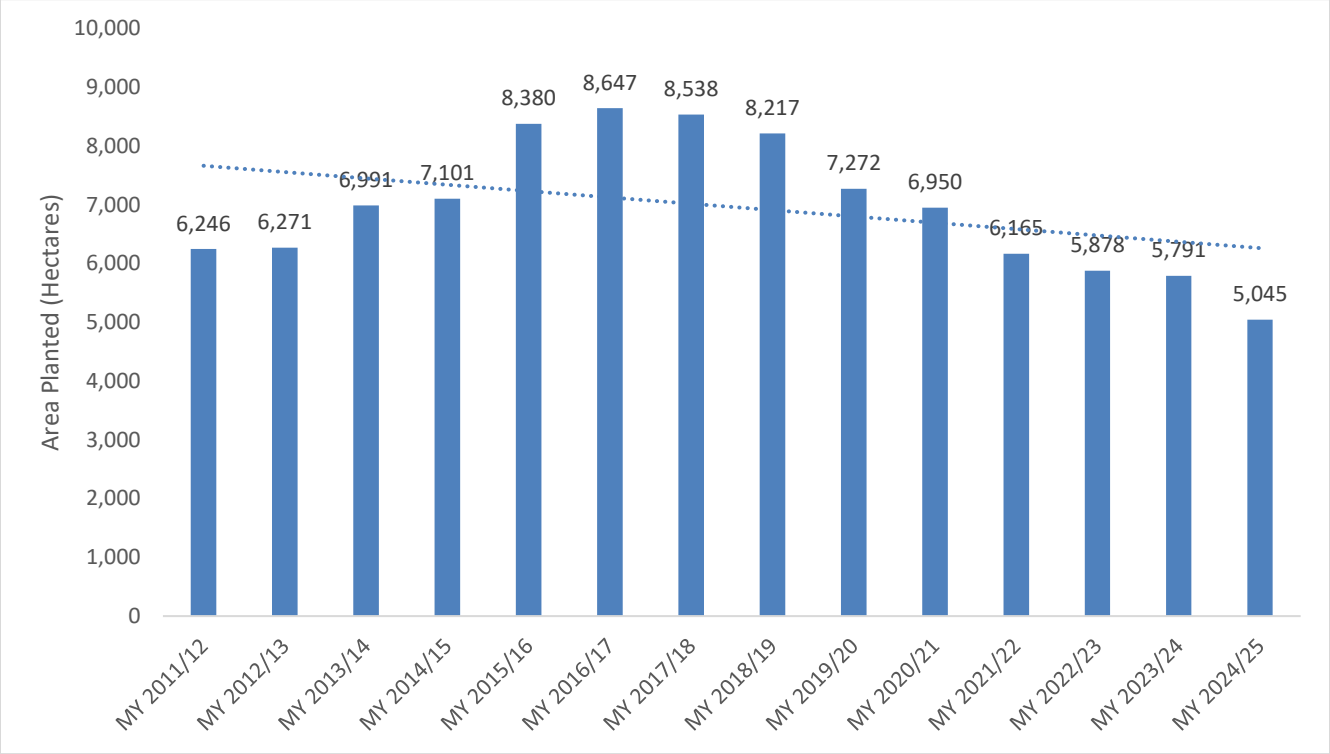
Some of the challenges that producers face are market limitations of certain varieties such as Abate Fetel and Coscia which are primarily demanded by Italy, and have limited demand in alternative markets. Moreover, pears have a limited shelf life and are highly susceptible to physical damage during transportation, which increases costs and reduces profitability. As a result, many producers are shifting to more profitable crops, such as cherries and walnuts, further reducing the area dedicated to pears.

The *O'Higgins* region is the top pear-producing region, accounting for 63.8 percent of the total area planted (Table 8). However, area planted with pears showed a 13.3 percent decrease over the past three years. 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 7.8 percent of

the total planted area, experienced the sharpest decline, with a 18.0 percent reduction in planted hectares.

The most grown varieties in Chile include Packham's Triumph, Forelle, Coscia, Winter Nelis, and Abate Fetel, but producers are increasingly focusing on varieties with better marketability and export potential.

Figure 5: Pear Area Planted (Hectares)



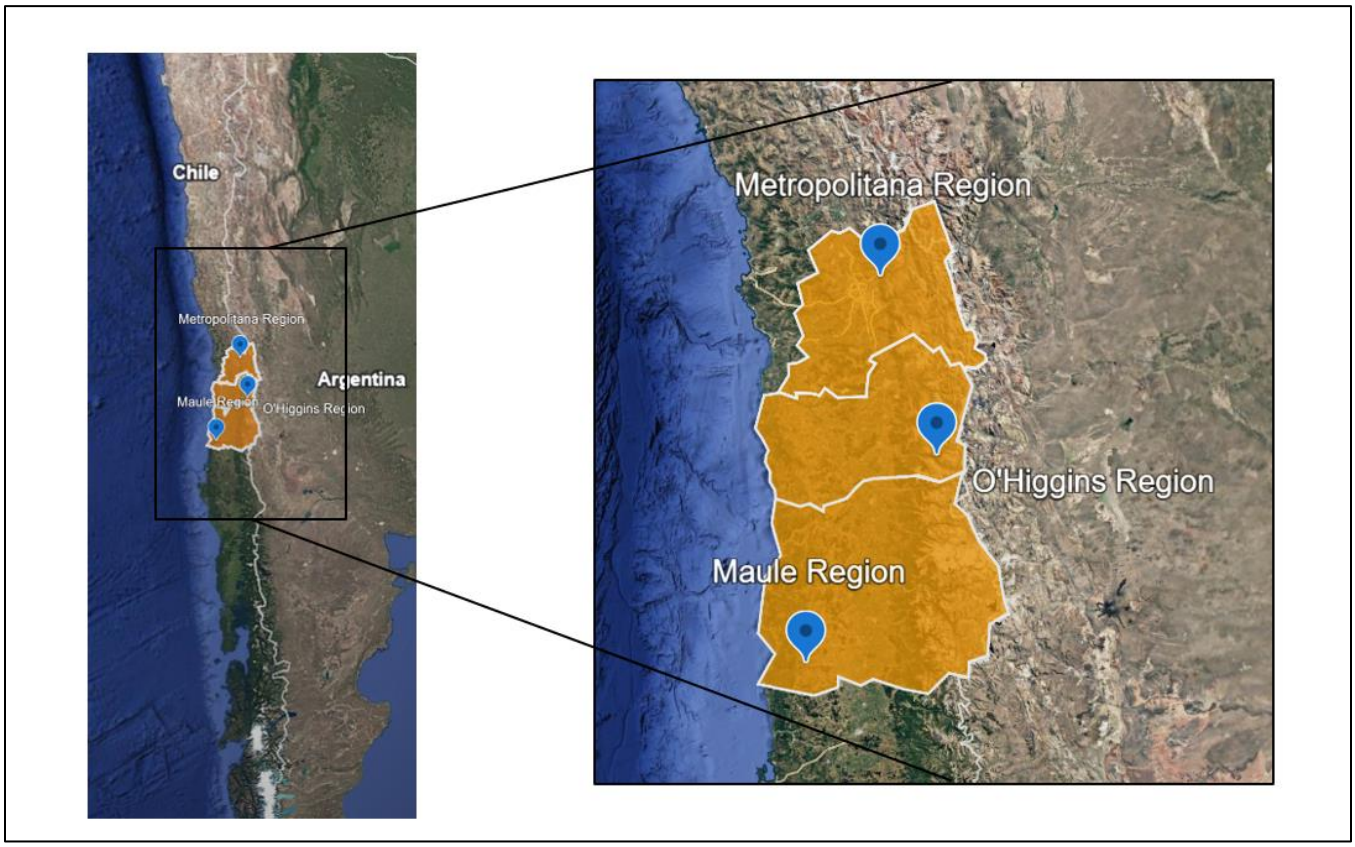
Source: ODEPA, 2025

Table 8: Pear Area Planted by Region MY 2024/25 (hectares)

Region	Area Planted (hectares)	Three Year Variation (%)	Share (%)
Metropolitana	393	-18.0%	7.8%
O'Higgins	3,220	-13.3%	63.8%
Maule	1,327	-15.2%	26.3%
Others	105		2.1%
Total	**5,045**	**-14.2%**	**100.0%**

Note: Variation of planted area is measured every three years; data provided are last available
Source: ODEPA, 2024

Map 3: Pear Production Regions in Chile



Source: Google Earth

Policy:

No new policy developments to report.

Consumption:

In MY 2025/26, domestic consumption of fresh pears in Chile is projected to decline to 95,800 metric tons, representing a 2.0 percent decrease compared to the previous year's estimate of 97,700 metric tons. Despite this slight decrease, domestic consumption will still account for 47.4 percent of total production. 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.

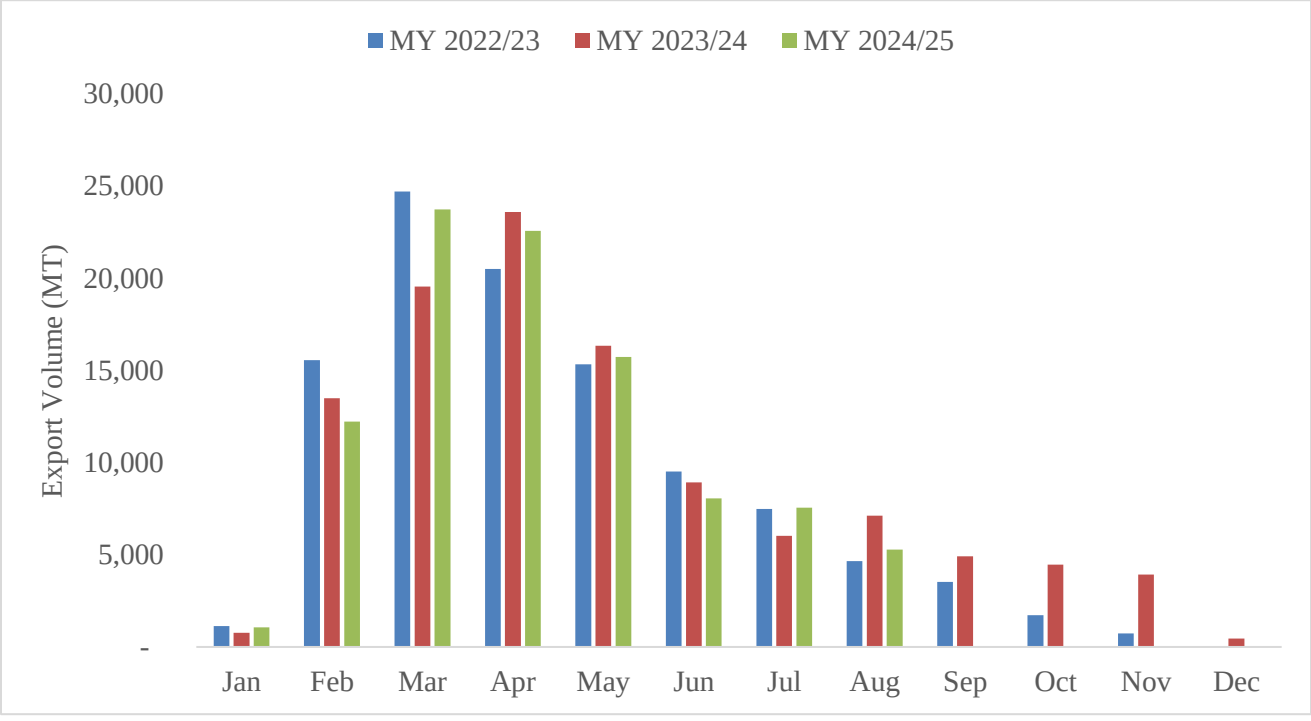
Trade:

In MY 2025/26, due to a higher production volume, Post estimates pear exports will increase by 4.7 percent and total 107,000 metric tons. 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.

Chile's top markets for fresh pear exports are Colombia. Italy, and Ecuador. In MY 2024/25 (data until August) exports to Colombia and Ecuador decreased. Meanwhile, exports to Italy and the Netherlands increased because exporters are seeking the high prices found in European markets (Table 9).

In MY 2024/25 (data until August), pear exports increased by 0.4 percent, totaling 96,200 metric tons (Table 9). Monthly export volumes were delayed in the beginning of the export season but later recovered as the season evolved (Figure 6).

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



Source: Trade Data Monitor, LLC

Table 9: Pear Export Volume to the World (MT)

Partner Country	Marketing Year			January-August		
	2022/23 (MT)	2023/24 (MT)	Variation (%)	Jan 2024 - Aug 2024 (MT)	Jan 2025 - Aug 2025 (MT)	Variation (%)
_World	104,913	109,609	4.5%	95,822	96,200	0.4%
Colombia	15,865	18,212	14.8%	12,270	11,080	-9.7%
Italy	14,184	17,458	23.1%	17,458	15,882	-9.0%
Ecuador	9,404	10,610	12.8%	8,317	6,658	-19.9%
Netherlands	7,419	7,863	6.0%	7,863	6,872	-12.6%
Russia	6,490	7,154	10.2%	7,154	7,855	9.8%
Spain	6,913	5,976	-13.6%	5,976	7,878	31.8%
United States	6,265	5,605	-10.5%	5,582	7,084	26.9%
Brazil	3,601	5,303	47.3%	4,083	3,559	-12.8%
Germany	3,892	3,684	-5.3%	3,684	4,641	26.0%
Peru	4,702	3,484	-25.9%	3,029	1,430	-52.8%
Others	26,178	24,260	-7.3%	20,406	23,261	14.0%

Source: Trade Data Monitor, LLC

Attachments:

No Attachments