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Report Name: Stone Fruit Annual

Country: Chile

Post: Santiago

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Report Highlights:

For the past decade, Chile's planted cherry area maintained steady growth, due to its profitability. There is a high demand for Chilean cherries from the Chinese market, which receives over 91 percent of Chilean cherry export volume. Post estimates cherry production in marketing year (MY) 2024/25 to reach 500,000 metric tons (MT), a 6.8 increase over MY2023/24. Chilean cherry exports are forecast to increase by 7.6 percent, reaching 445,000 MT in MY 2023/25. In MY 2024/25, Post estimates nectarine and peach production to total 173,000 MT, a 0.6 percent increase over the previous year. Peach and nectarine exports are forecast to increase by 0.8 percent totaling 116,000 metric tons.

Fresh Cherries, (Sweet & Sour)

Table 1: Production, Supply and Distribution Data Statistics

Cherries (Sweet&Sour), Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Nov 2022		Nov 2023		Nov 2024	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	61600	61599	64000	63495	0	67000
Area Harvested (HA)	50000	50000	55000	55000	0	58000
Bearing Trees (1000 TREES)	36000	36000	38000	38000	0	42000
Non-Bearing Trees (1000 TREES)	2000	2000	2000	2000	0	2000
Total Trees (1000 TREES)	38000	38000	40000	40000	0	44000
Commercial Production (MT)	469000	469000	500000	468000	0	500000
Non-Comm. Production (MT)	2000	2000	2000	2000	0	2000
Production (MT)	471000	471000	502000	470000	0	502000
Imports (MT)	0	0	0	0	0	0
Total Supply (MT)	471000	471000	502000	470000	0	502000
Domestic Consumption (MT)	56000	56936	62000	56338	0	57000
Exports (MT)	415000	414064	440000	413662	0	445000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	471000	471000	502000	470000	0	502000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post estimates

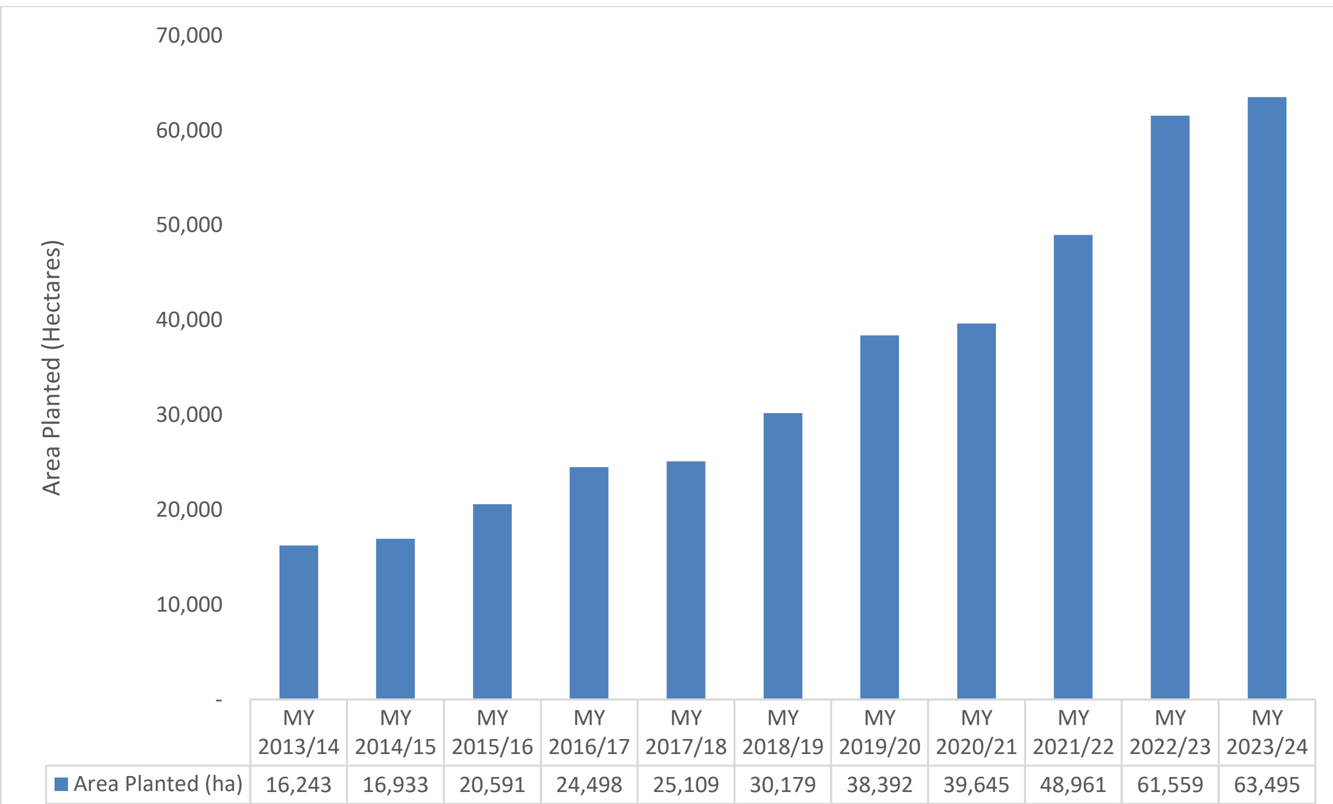
Production:

In MY2024/25, Post estimates cherry area planted will reach 67,000 hectares (HA), which represents a 5.5 percent increase over MY2023/24 (Table 1). For the past decade, the Cherry area has maintained steady growth due to its profitability and high demand, especially from the Chinese market (Figure 1). In MY 2023/24, Cherry area planted grew by 3.1 percent, reaching 63,945 hectares. Post estimates area harvested at 58,000 hectares since many cherry orchards were recently planted and are still unproductive. Cherry production takes place around 4-5 years after planting.

Chilean cherry production volume has grown consistently year over year, following the increase in area planted. However, in MY2023/24, despite the growth in area planted, production decreased by 0.2 percent. Climatic conditions in MY2023/24 were characterized by a warm winter and a rainy spring, which reduced cherry yields and resulted in lower-than-expected production.

In MY 2024/25, rainfall during the winter has been abundant and temperatures during the winter have been sufficiently low. Because of the projected increase in area planted and assuming regular climatic conditions during the spring, Post estimates production MY 2024/25 to reach 500,000 MT, a 6.8 increase over MY2023/24.

Figure 1: Cherry Area Planted (Hectares)



Source: based in ODEPA, 2024
* Post estimation

According to data from the Chilean Ministry of Agriculture's Office of Agricultural Studies and Policy (ODEPA), the Maule region, in the central-south part of Chile, holds 27,818 hectares or 43.8 percent of the area planted in Chile, making it the top production region in Chile (see Table 2). O'Higgins region, in the central part of the country, holds 22,966 hectares of area planted that represents 36.2 percent of total area planted. The Maule and O'Higgins regions have ideal conditions for cherry production, that include sufficient chill hours during the winter, sufficient water for irrigation and absence of frosting during the spring.

Chilean producers typically use plastic rooftops to avoid potential damage to the fruit by rainfall. Most production areas in Chile have some risk of rainfall during the bloom or harvest months, between September and February each year, thus rooftops to protect the orchards are a necessity for cherry producers.

The top cherry varieties produced in Chile are Santina, Lapins, and Regina. Many new projects are using Santina as the top planted variety due to its favorable adaptation to the Chilean climate and to its long post-harvest resilience, which is crucial for Chilean cherries due to the long distance traveled to the Chinese market. However, Chile produces other varieties like Bing, Sweetheart, Rainier, Royal Dawn, Skeena, and Kordia.

Table 2: Cherry Area Planted by Region (Hectares)

Region	Area Planted (ha)	Three-Year Variation (%)	Share (%)
Maule	27,818	57.6%	43.8%
O'Higgins	22,966	67.6%	36.2%
Metropolitana	5,430	47.5%	8.6%
Ñuble	2,973	85.8%	4.7%
La Araucanía	1,635	39.7%	2.6%
Others	2,673	-	4.2%
Total	**63,495**	**61.2%**	**100.0%**

Source: based in ODEPA, 2023

Trade:

Post estimates Chilean cherry exports will increase by 7.6 percent in MY 2024/24 over MY 2023/24 reaching 445,000 MT due to increased production. This estimate is based on regular climatic conditions and no unexpected shocks to cherry production and export industry.

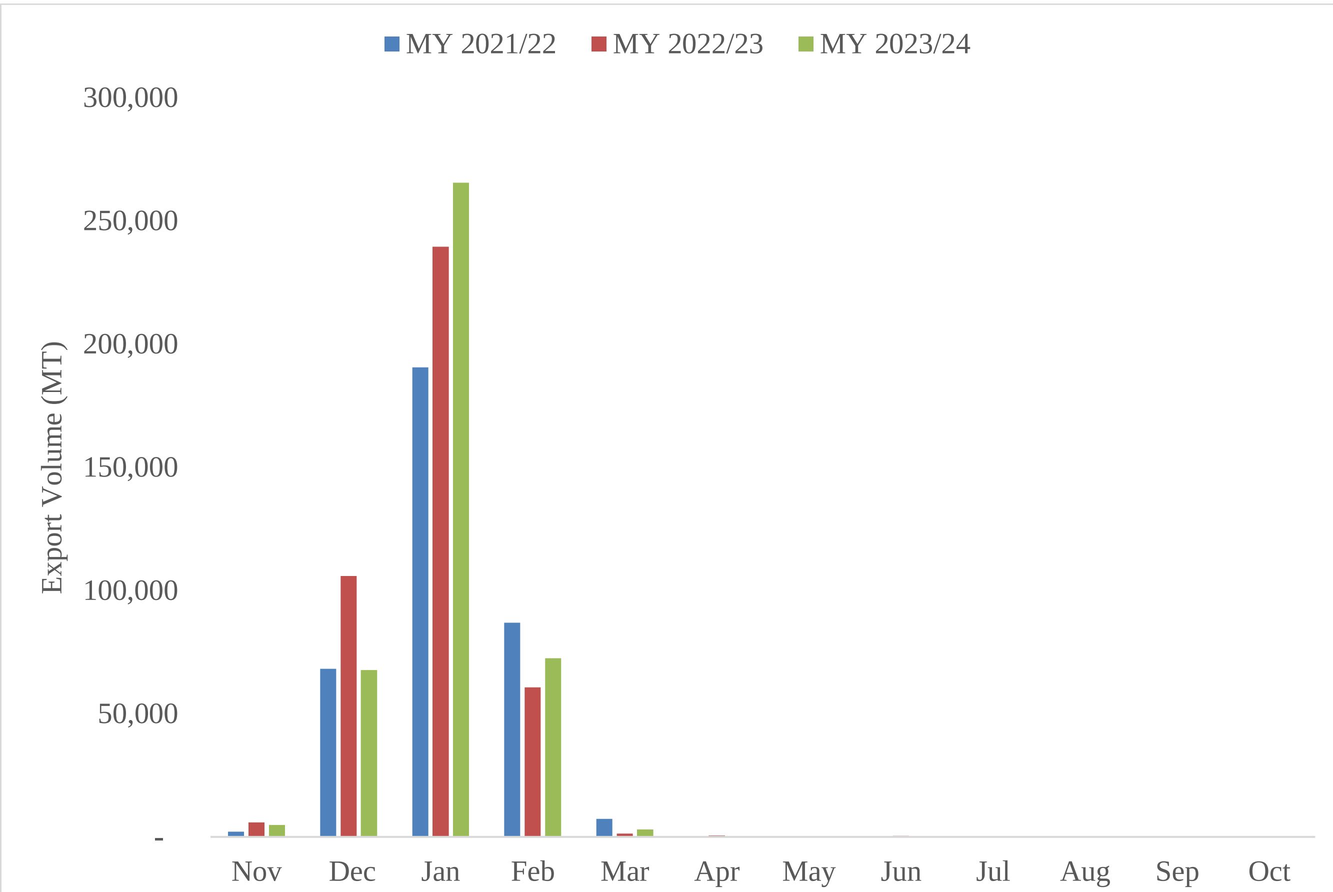
In MY2023/24 (data until June), cherry exports totaled 413,662 metric tons (MT), a 0.2 percent decrease from MY2022/23 (Table 3). However, due to high prices for Chilean cherries in the Chinese market, export value in MY2023/24 increased by 11.4 percent and totaled $2.4 billion (Table 4).

China is the top market for Chilean cherries. Cherry exports to China totaled 375,636 MT in MY 2022/23, representing 90 percent of Chilean cherry exports. The second top market is the United States, with exports of 14,335 MT, and accounts for 3.5 percent of total Chilean fresh cherry exports. However, Chilean exporters are trying to diversify export markets and reduce dependency on the Chinese market. Exporters have not been able to allocate significant volumes of cherries in other markets since demand for cherries and prices in the Chinese market are significantly higher than any other market.

The consistent growth in export volume continues to push the harvest and packing capacity of the producers and exporters. Both stages are crucial to obtaining a high-quality cherry that can travel to far-away export markets. Cherry harvesting and packing are critical tasks since cherries are easily damaged by manipulation and high temperatures. The packing process is automated to avoid physical damage of the fruit. Cherry producers and exporters are working to ensure they complete the harvest and packing process in a short amount of time.

Another concern within the Chilean cherry exports is to consistently provide high-quality cherries to maintain high prices for their exports. Considering the hectares of production volume grows every year, this task becomes increasingly difficult. The Chilean exporting industry is working with exporters and producers as a group to maintain quality standards for their exports.

Figure 3: Cherry Export Volume by Month (MT)



Source: Trade Data Monitor, LLC.

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

Commodity: 080921,080929, Sour Cherries (Prunus Cerasus), Fresh/Cherries, Fresh, Other Than Sour		
Partner Country	**Marketing Year**	**Year to Date**

	MY 2021/22 (MT)	MY 2022/23 (MT)	Variation (%)	Nov 2022 - June 2023 (MT)	Nov 2023 - June 2024 (MT)	Variation (%)
The World	355,721	414,598	16.6%	414,486	413,662	-0.2%
China	311,656	362,856	16.4%	362,830	375,636	3.5%
United States	13,203	18,161	37.6%	18,112	14,335	-20.9%
South Korea	6,930	6,450	-6.9%	6,448	3,552	-44.9%
Taiwan	5,945	6,401	7.7%	6,383	3,981	-37.6%
Brazil	2,676	3,898	45.7%	3,891	3,698	-5.0%
Ecuador	2,259	2,835	25.5%	2,835	2,155	-24.0%
United Kingdom	2,907	2,476	-14.8%	2,476	2,214	-10.6%
Thailand	1,012	1,735	71.4%	1,734	1,262	-27.2%
Hong Kong	1,608	1,482	-7.8%	1,482	932	-37.1%
Vietnam	595	1,400	135.3%	1,400	1,366	-2.4%
Spain	922	981	6.4%	981	876	-10.7%
Canada	897	959	6.9%	956	543	-43.2%
Netherlands	1,802	761	-57.8%	761	428	-43.8%
Bolivia	567	648	14.3%	648	521	-19.6%
Mexico	338	626	85.2%	626	366	-41.5%
Others	2,404	2,929	21.8%	2,923	1,797	-38.5%

Source: Trade Data Monitor, LLC.

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

Commodity: 080921,080929, Sour Cherries (Prunus Cerasus), Fresh/Cherries, Fresh, Other Than Sour

Partner Country	Marketing Year			Year to Date		
	MY 2021/22 (Million USD)	**MY 2022/23 (Million USD)**	**Variation (%)**	**Nov 2022 - June 2023 (Million USD)**	**Nov 2023 - June 2024 (Million USD)**	**Variation (%)**
The World	1,886.9	2,197.6	16.5%	2,196.9	2,448.3	11.4%
China	1,670.3	1,957.3	17.2%	1,957.0	2,246.5	14.8%
United States	59.9	84.8	41.7%	84.6	73.3	-13.4%
South Korea	41.7	34.4	-17.3%	34.4	23.7	-31.3%
Taiwan	30.9	33.9	9.8%	33.8	21.6	-36.0%
Brazil	9.6	12.5	30.5%	12.4	17.8	42.6%
Thailand	7.2	11.2	54.9%	11.1	8.9	-20.0%
United Kingdom	13.0	9.9	-23.7%	9.9	13.3	34.6%
Hong Kong	11.0	8.5	-22.8%	8.5	5.7	-33.3%
Vietnam	4.2	7.7	85.6%	7.7	7.5	-3.6%
Spain	5.1	5.1	0.8%	5.1	5.4	4.5%
Canada	4.3	5.0	16.5%	5.0	3.3	-34.3%
Ecuador	4.3	4.7	9.7%	4.7	4.6	-3.3%
Netherlands	9.5	4.1	-56.6%	4.1	2.7	-35.7%
India	2.9	2.8	-3.3%	2.8	2.8	0.7%
Mexico	1.5	2.7	79.9%	2.7	2.1	-23.5%
Others	11.5	12.7	11.0%	12.7	9.3	-26.7%

Source: Trade Data Monitor, LLC.

Consumption:

In MY2022/23, Post estimates domestic consumption will increase by 1.2 percent and total 57,000 MT which represents 11.4 percent of commercial production. This increase in domestic consumption follows the increase in production and, thus, in the overall supply and availability of cherries. Domestic consumption consists mostly of cherries, which do not comply with the quality features for exports. Most of the domestic cherry consumption is fresh and very few companies currently process canned cherries or confectionery products.

Policy:

No policy updates to report.

Fresh Peaches & Nectarines

Table 5: Production, Supply and Distribution Data Statistics

Peaches & Nectarines, Fresh	**2022/2023**		**2023/2024**		**2024/2025**	
Market Year Begins	**Nov 2022**		**Nov 2023**		**Nov 2024**	
Chile	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (HA)	8475	8475	8500	8497	0	8550
Area Harvested (HA)	8000	8000	8000	8000	0	8050
Bearing Trees (1000 TREES)	6500	6500	6500	6500	0	6550
Non-Bearing Trees (1000 TREES)	720	720	700	710	0	720
Total Trees (1000 TREES)	7220	7220	7200	7210	0	7270
Commercial Production (MT)	160000	160000	163000	172000	0	173000
Non-Comm. Production (MT)	1000	1000	1000	1000	0	1000
Production (MT)	161000	161000	164000	173000	0	174000
Imports (MT)	40	100	50	100	0	100
Total Supply (MT)	161040	161100	164050	173100	0	174100
Domestic Consumption (MT)	57340	57148	59050	58069	0	58100
Exports (MT)	103700	103952	105000	115031	0	116000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	161040	161100	164050	173100	0	174100
(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:

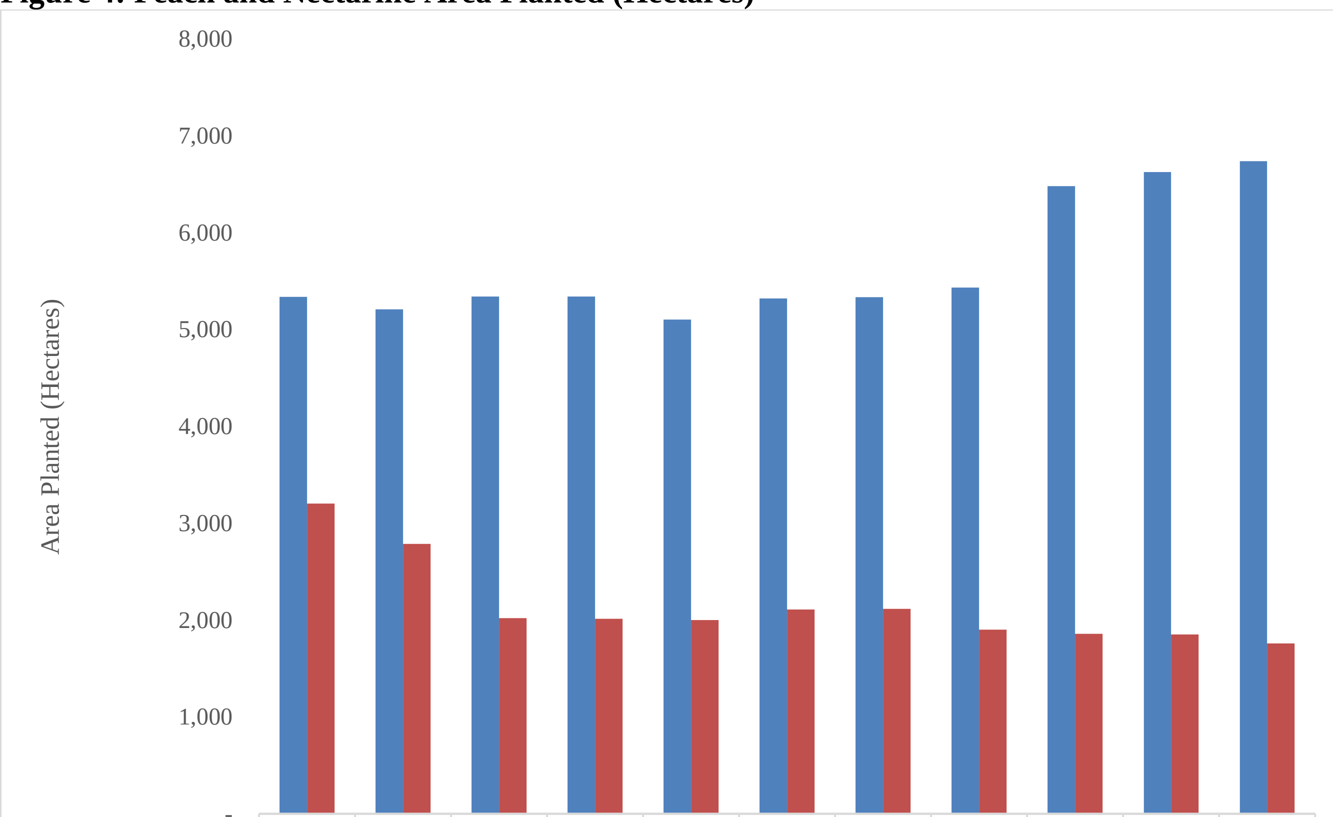
In MY2024/25, Post estimates the fresh peach and nectarine area planted at 8,550 hectares, which represents a 0.6 percent increase from MY2023/24. Post estimates this slight variation in the area planted because the increasing trend in nectarine plantings is offset by a decrease in fresh peach area planted.

In MY2024/25, due to the increase in area planted, Post estimates fresh peach and nectarine production to total 173,000 metric tons (MT), a 0.6 percent increase over MY2023/24 (Table 5). This slight increase assumes regular yields and no adverse climatic conditions that could hinder production volume.

Nectarine production for exports remains profitable for fruit producers. As a result, nectarine area planted grew from 5,101 hectares in MY2017/18 to 6,737 hectares in MY2023/24. Nectarine area planted is mainly in the O'Higgins and the Metropolitana regions, in the central part of the country. Area planted in both regions grew by 26.6 percent and 11.4 percent, respectively, in the past three marketing years (Table 6).

Conversely, area planted with fresh peach hectaress consistently decreased in the past decade and remains below 2,000 hectares since MY2020/21 (Figure 4). The decline in planted area is due to low margins of fresh peaches versus other stone fruits, which pushed producers to shift their orchards to more profitable crops such as nectarines or even cherries. Fresh peach area planted is located mainly in the O'Higgins region, that holds 58.2 percent of the fresh peach area planted in Chile (Table 6).

Figure 4: Peach and Nectarine Area Planted (Hectares)



	MY 2013/14	MY 2014/15	MY 2015/16	MY 2016/17	MY 2017/18	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	MY 2023/24
Nectarines (ha)	5,338	5,209	5,340	5,339	5,101	5,320	5,333	5,433	6,479	6,624	6,737
Fresh Peaches (ha)	3,204	2,787	2,019	2,015	2,000	2,108	2,116	1,902	1,860	1,851	1,760

Source: based in ODEPA, 2024
Note: data does not include canned peaches

Table 6: Nectarine Area Planted by Region (Hectares)

Region	Planted Area (ha)	Three-Year Variation (%)	Share (%)
O'Higgins	4,893	26.6%	72.6%
Metropolitana	1,347	11.4%	20.0%
Valparaíso	271	-8.3%	4.0%
Others	226	-	3.4%
Total	**6,737**	**24.0%**	**100.0%**

Source: ODEPA, 2024

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

Region	Area Planted (ha)	Three-Year Variation (%)	Share (%)
O'Higgins	1,025	-3.7%	58.2%
Metropolitana	487	-12.5%	27.7%
Valparaíso	208	-9.7%	11.8%
Others	39		2.2%
Total	**1,760**	**-7.5%**	**100.0%**

Source: ODEPA, 2024

Consumption:

In MY2024/25, Post estimates total domestic consumption, which includes both fresh domestic consumption and processing, will total 58,100 MT, nearly the same as MY 2023/24. Domestic consumption of fresh nectarines and peaches remains relatively steady since they are well-known products that are regularly consumed during the harvest season between December and February in Chile. Processing includes peach and nectarines for juice, desserts, and other processed products.

Trade:

For MY 2024/25, based on higher production volume, Post projects exports to increase by 0.8 percent totaling 116,000 MT(See Table 5). In MY2023/24 Chilean exports of peaches and nectarines increased by 10.8 percent in volume, totaling 115,031 MT(Table 8) and $175 million (Table 9).

China is the top market for Chilean nectarines. In MY2023/24, Chile exported 46,198 MT of nectarines to China, a 33 percent increase over the previous marketing year. On the contrary, exports to the United States decreased by

10.3 percent, totaling 28,983 metric tons. However, the United States remains a competitive market for Chilean stone fruit exports and maintains as a market as part of the diversification in Chilean export portfolios.

Table 8: Chile Exports to The World by Volume

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	**Marketing Year**			**Year to Date**		
	MY 2021/22 (MT)	**MY 2022/23 (MT)**	**Variation (%)**	**Nov 2022 - June 2023 (MT)**	**Nov 2023 - June 2024 (MT)**	**Variation (%)**
The World	111,588	103,952	-6.8%	103,806	115,031	10.8%
China	37,307	34,658	-7.1%	34,658	46,198	33.3%
United States	31,964	32,466	1.6%	32,320	28,983	-10.3%
Mexico	9,355	10,416	11.3%	10,416	10,870	4.4%
Brazil	6,360	5,662	-11.0%	5,662	6,128	8.2%
Taiwan	4,923	5,283	7.3%	5,283	5,284	0.0%
Netherlands	5,936	3,298	-44.4%	3,298	4,669	41.6%
Canada	3,250	2,102	-35.3%	2,102	1,926	-8.4%
Peru	1,226	1,758	43.4%	1,758	2,141	21.8%
Russia	2,055	1,078	-47.5%	1,078	1,771	64.3%
Ecuador	1,065	909	-14.6%	909	683	-24.9%
Guatemala	668	879	31.6%	879	935	6.4%
Spain	429	632	47.3%	632	853	35.0%
Argentina	516	626	21.3%	626	110	-82.4%
Colombia	751	585	-22.1%	585	688	17.6%
Italy	438	527	20.3%	527	339	-35.7%
Others	5,345	3,073	-42.5%	3,073	3,453	12.4%

Source: Trade Data Monitor, LLC.

Note: Data does not include canned peaches

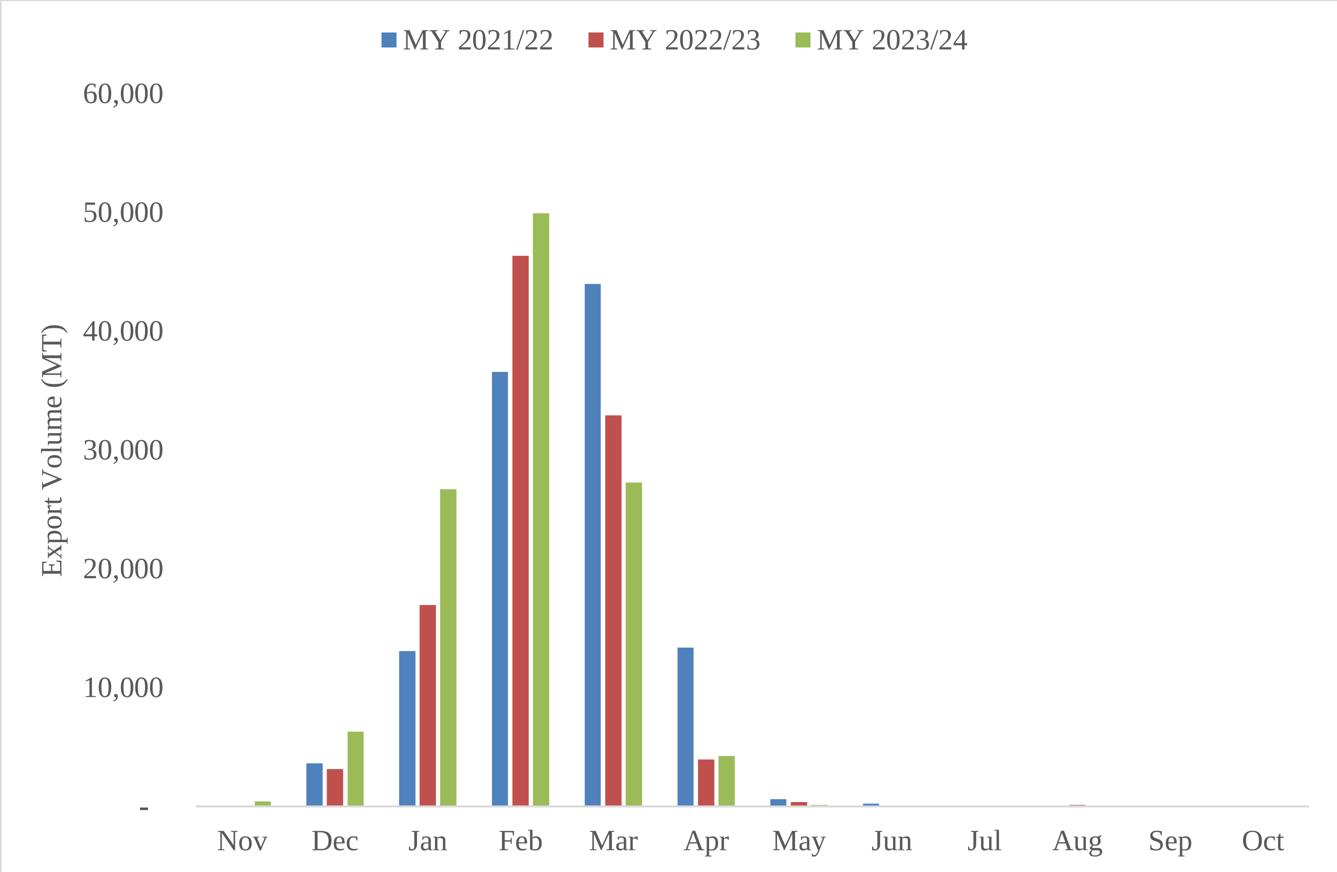
Table 9: Chile Exports to the World by Value (USD)

Commodity: 080930, Peaches, Including Nectarines, Fresh						
Partner Country	Marketing Year			Year to Date		
	MY 2021/22 (Million USD)	MY 2022/23 (Million USD)	Variation (%)	Nov 2022 - June 2023 (Million USD)	Nov 2023 - June 2024 (Million USD)	Variation (%)
The World	139.6	136.1	-2.5%	136.0	175.0	28.7%
China	52.5	48.0	-8.6%	48.0	69.0	43.9%
United States	35.9	37.6	4.7%	37.4	40.6	8.6%
Mexico	12.3	14.9	21.7%	14.9	21.1	41.9%
Taiwan	6.2	7.4	18.5%	7.4	8.9	20.9%
Brazil	6.8	6.5	-4.7%	6.5	7.9	22.0%
Netherlands	6.1	4.7	-22.8%	4.7	7.1	50.8%
Canada	4.8	3.5	-27.1%	3.5	3.7	6.3%
Peru	1.5	2.0	33.8%	2.0	2.4	23.4%
Russia	2.8	1.6	-42.1%	1.6	2.7	63.5%
Guatemala	1.0	1.6	51.6%	1.6	1.7	5.5%
Ecuador	1.3	1.1	-13.3%	1.1	1.0	-12.5%
Spain	0.6	0.8	44.8%	0.8	1.2	46.8%
Colombia	1.0	0.8	-27.2%	0.8	1.1	40.3%
Argentina	0.5	0.7	34.6%	0.7	0.1	-82.7%
Costa Rica	0.6	0.7	12.7%	0.7	0.6	-9.5%
Others	5.8	4.4	-23.7%	4.4	5.9	33.4%

Source: Trade Data Monitor, LLC.

Note: Data does not include canned peaches.

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



Source: Trade Data Monitor, LLC.

Policy:

No policy updates to report.

Attachments:

No Attachments