Chilean Raspberry Industry

- Harvest period: December to April.
- Varieties: Heritage 80% - Meeker 8% - Others (Chilliwack, Dolomia, Amity, Santas, Regina, ....)
- Surface: 6.000-7.000 Hectares.
- More than 10.000 raspberry farmers.
- More than 100 cold storages freezing raspberries.
- 4 - 5 processors of raspberry juices/4-5 for pulps.
- Sanitary Regulation 3410 / SAG Processors/Farmers alliances / INDAP.
## Destinations for raw material (metric tons)

<table>
<thead>
<tr>
<th>Product</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen</td>
<td>29.506</td>
<td>29.506</td>
<td>27.165</td>
<td>26.079</td>
<td>25.392</td>
</tr>
<tr>
<td>Juice</td>
<td>4.910</td>
<td>3.304</td>
<td>5.285</td>
<td>2.940</td>
<td>2.247</td>
</tr>
<tr>
<td>Fresh</td>
<td>8</td>
<td>138</td>
<td>90</td>
<td>210</td>
<td>5</td>
</tr>
<tr>
<td>Canned</td>
<td>99</td>
<td>99</td>
<td>99</td>
<td>99</td>
<td>106</td>
</tr>
<tr>
<td>Dehydrated</td>
<td>69</td>
<td>69</td>
<td>38</td>
<td>125</td>
<td>139</td>
</tr>
<tr>
<td>Local Consumption</td>
<td>2.500</td>
<td>2.500</td>
<td>2.500</td>
<td>2.500</td>
<td>2.500</td>
</tr>
<tr>
<td>Total</td>
<td>37.092</td>
<td>35.616</td>
<td>35.177</td>
<td>31.953</td>
<td>30.389</td>
</tr>
</tbody>
</table>

Juice: 7:1; Dehydrated 6.25:1; Canned 0.65:1.
Total raspberry production in the last 5 years

2015: 37.092 TONS
2016: 35.616 TONS
2017: 35.177 TONS
2018: 31.953 TONS
2019: 30.389 TONS
Frozen raspberry exports last 5 years

Ton

USDx1000

2015 2016 2017 2018 2019

The graph shows the trend of frozen raspberry exports from 2015 to 2019, with a decline in tonnage over the years.
Raspberry juice concentrate exports last 5 years

Ton

USDx1000

2015  2016  2017  2018  2019

0  100  200  300  400  500  600  700  800  900  1000  1100  1200

2015  2016  2017  2018  2019

0  200  400  600  800  1000  1200

Raspberry juice concentrate exports last 5 years
Chile: Markets for 2019 exports

Conventional frozen raspberry exports
Year 2019

- EE.UU.: 25%
- Australia: 22%
- Canada: 17%
- New Zealand: 4%
- Brazil: 3%
- Netherlands: 5%
- Japan: 4%
- France: 5%
- Argentina: 2%
- Others: 11%

Source: ODEPA.

Organic frozen raspberry exports
Year 2019

- EE.UU.: 60%
- Canada: 28%
- Australia: 6%
- New Zealand: 2%
- Others: 4%

Source: ODEPA.
Update for 2020 exports of frozen berries

**JANUARY - MARCH 2019/2020**

<table>
<thead>
<tr>
<th>Product</th>
<th>Volume: Ton</th>
<th>Value: USD x 1000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total 2019</td>
<td>2019</td>
</tr>
<tr>
<td>Strawberries</td>
<td>41.941</td>
<td>13.770</td>
</tr>
<tr>
<td>Raspberries</td>
<td>25.392</td>
<td>4.696</td>
</tr>
<tr>
<td>Blackberries</td>
<td>17.812</td>
<td>6.428</td>
</tr>
<tr>
<td>Blueberries</td>
<td>44.184</td>
<td>10.740</td>
</tr>
<tr>
<td>Others fruits</td>
<td>23.879</td>
<td>5.484</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>153.208</strong></td>
<td><strong>41.119</strong></td>
</tr>
</tbody>
</table>

Source: Chilealimentos A.G.
Conclusions

• 2019/2020 crop, low yields due to severe draught.

• Prices for raw material much higher than last season.

• Chilean raspberry industry working together under a specific committee: Mesa Nacional de la Frambuesa.

• High exchange rate US $ v/s Ch $ has helped the industry this crop.

• Firm interest in new varieties.

• Taking strong care about Food Safety, specially at farm level. Public - private initiative.
Thank you