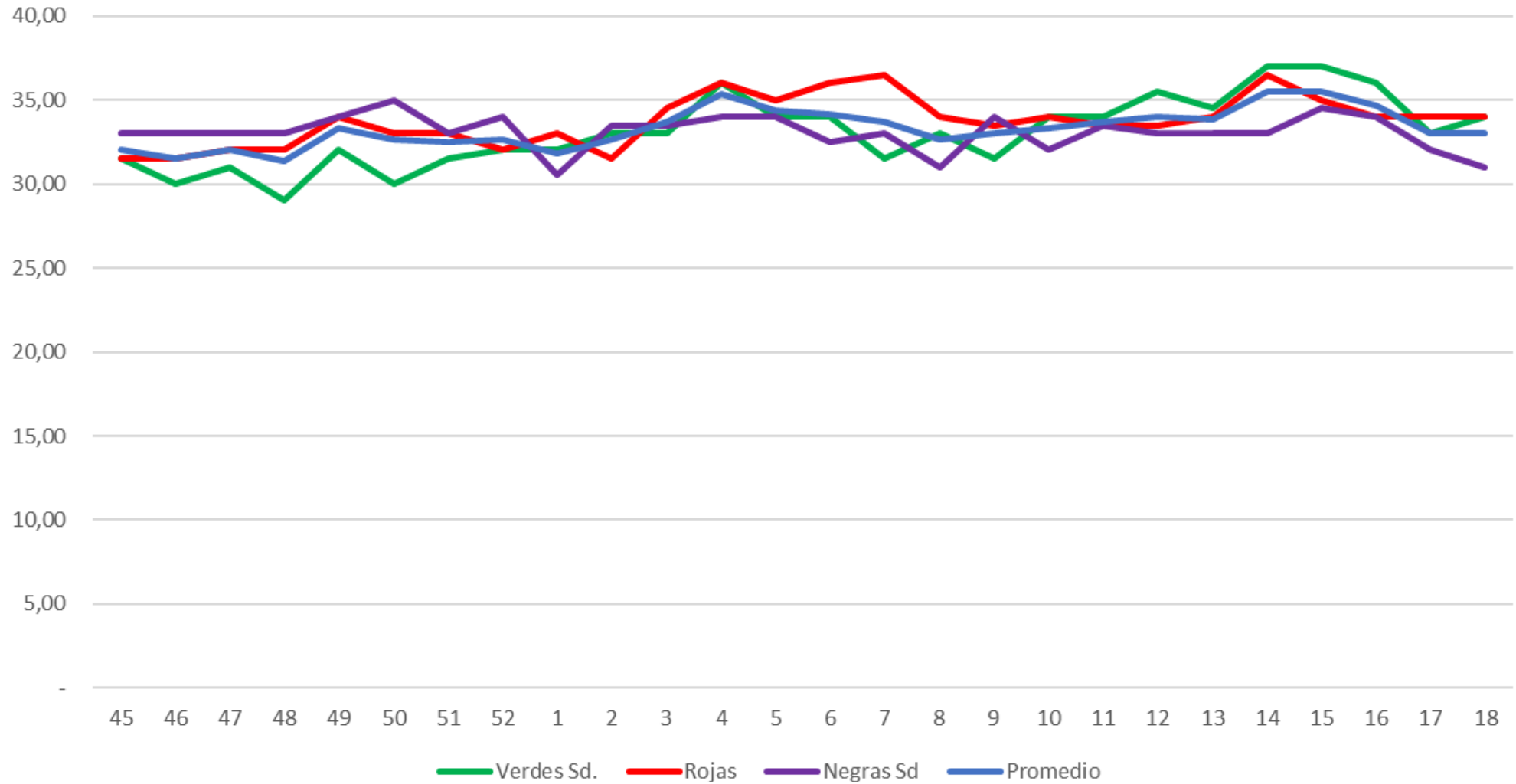


33



### PRECIOS USDA 2023-2024 VENTA USD (PROMEDIO MOSTLY USDA PHL L Y XL)



# Redescubriendo las oportunidades del mercado Norteamericano

9ª EXPOVID A.N.A. – 2024

Mayo 2024

Christian Corssen

Gerente General Cía. Frutera Santa María S.A.





¡POR FIN!



## 8 Factores que influyeron:

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1. California -19% (77,1 MM)

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2. Perú: -12% (62.7 M)

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3. Adelanto zona norte Chile

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4. Atraso zona centro-sur Chile

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5. Mejores Variedades

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6. Mejores Calibres

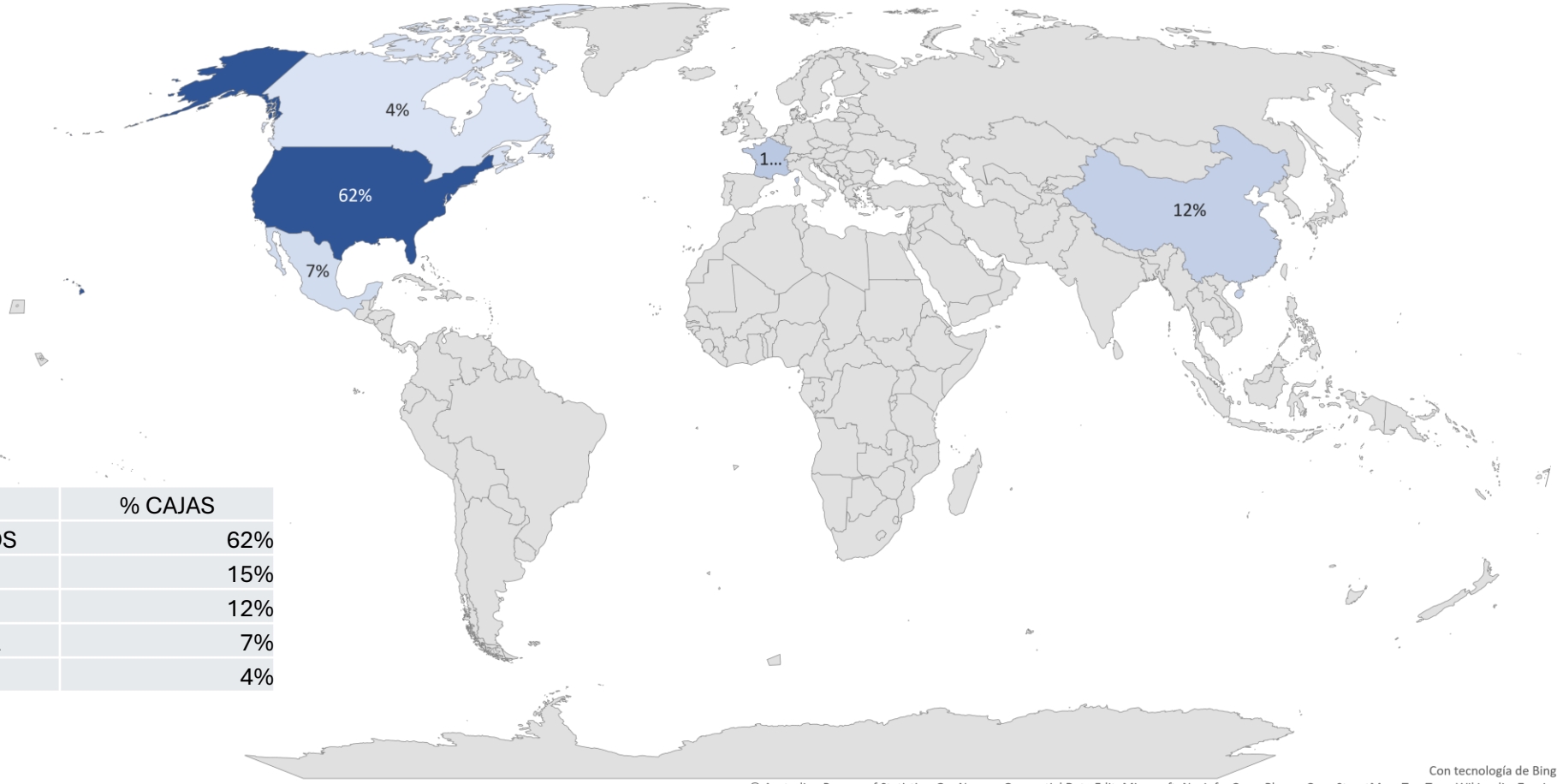
---

7. Buena Calidad y Condición

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8. Otros (TDC – Fletes)

# DISTRIBUCIÓN POR REGIÓN DE DESTINO



REGIÓN	% CAJAS
ESTADOS UNIDOS	62%
EUROPA	15%
L. ORIENTE	12%
LATINOAMERICA	7%
CANADA	4%

# OFERTA Y DEMANDA



<b>Mercado U.S.A.</b>	<b>Cajas</b>	<b>Rango Precios</b>	
SHORT	$\leq 2$ Millones	US\$ 30 - 40+	35
STEADY	2 - 3,5 Millones	US\$ 28 - 36	32
OVER SUPPLY	3,5 - 5 Millones	US\$ 20 - 28	24
FLOODED	$\geq 5$ Millones	US\$ 20 -	18

*\* Presentación "Grape Discussion"*

*Grupo Uva de Mesa IFPA*



## PROYECCIÓN VS EXPORTACION - PERÚ / CHILE / SUDÁFRICA

EN CAJAS DE 8.2 KG

### PROYECCIÓN

SEM 34 - SEM 17

**165.4 M**

### EXPORTACIÓN

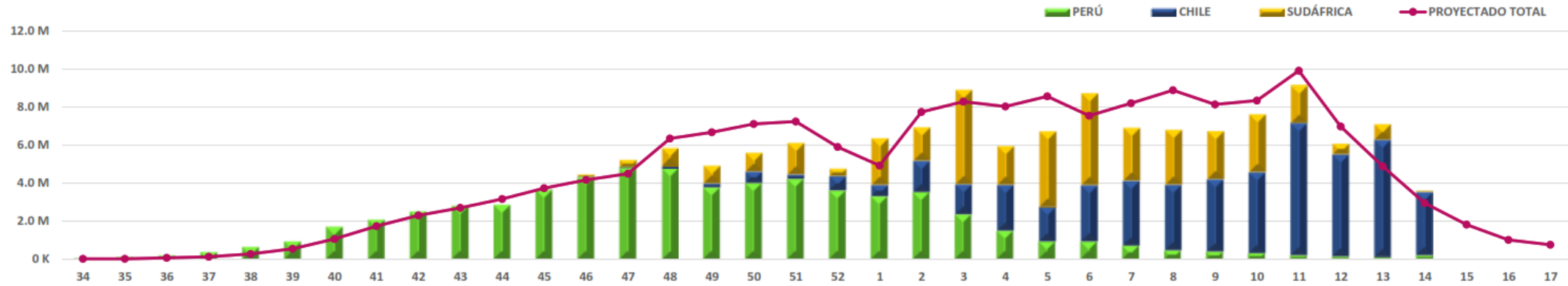
SEM 34 - SEM 14

**152.4 M**

### AVANCE %

SEM 34 - SEM 14

**92%**



## EXPORTACIÓN POR DESTINOS PERÚ / CHILE / SUDÁFRICA

● PERÚ ● CHILE ● SUDÁFRICA

EXPORTACIÓN PERÚ

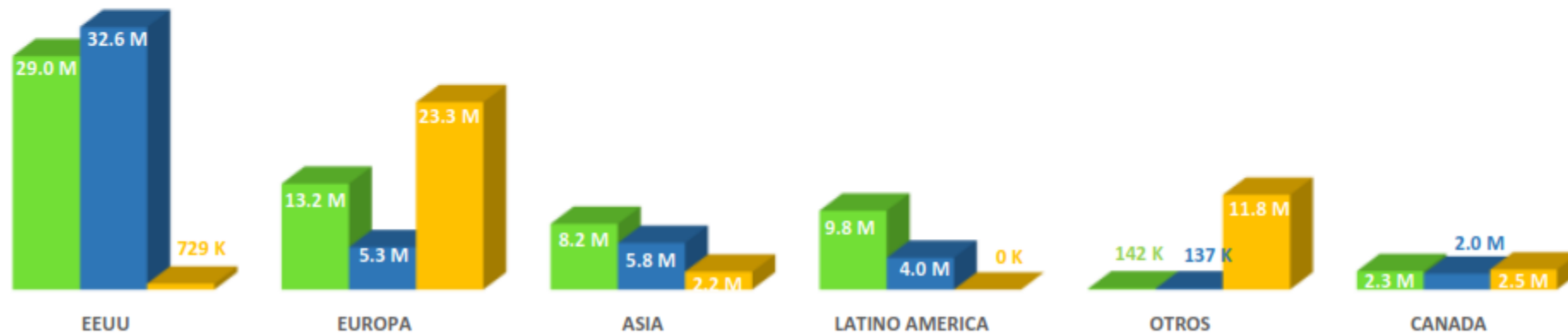
EXPORTACIÓN CHILE

EXPORTACIÓN SUDÁFRICA

SEM 34 - SEM 14

SEM 45 - SEM 14

SEM 43 - SEM 14



# Exportaciones de Uvas de Perú y Chile vs la estimación



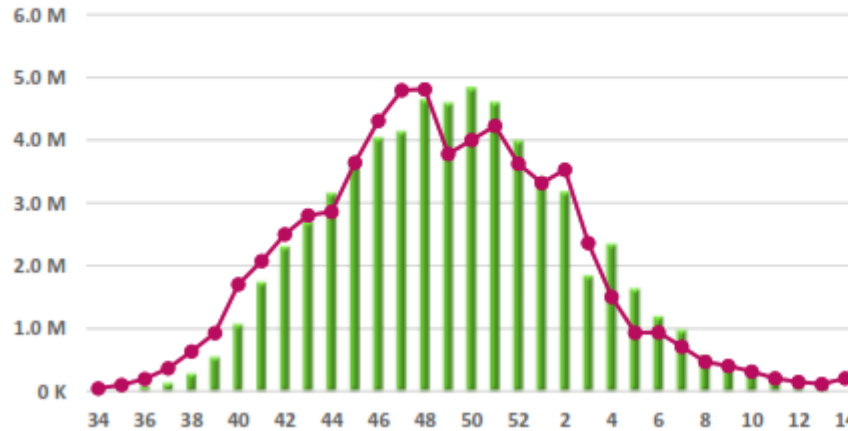
## PROYECCIÓN VS EXPORTACIÓN PERÚ



**PROYECCIÓN**  
SEM 34 - SEM 14  
**63.8 M**

**EXPORTACIÓN**  
SEM 34 - SEM 14  
**62.6 M**

**AVANCE %**  
SEM 34 - SEM 14  
**98%**



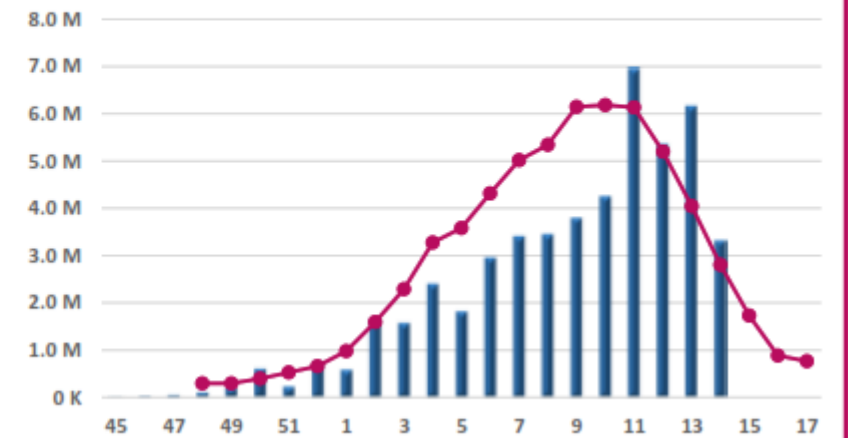
## PROYECCIÓN VS EXPORTACIÓN CHILE



**PROYECCIÓN**  
SEM 48 - SEM 17  
**62.5 M**

**EXPORTACIÓN**  
SEM 45 - SEM 14  
**49.7 M**

**AVANCE %**  
SEM 45 - SEM 14  
**80%**





<b>EMBARQUES DE UVAS TOTALES Y A U.S.A.</b>				
<u>Temp. 2023-2024</u>				
<b>Total Embarcado:</b>		<b>39.331.881</b>	<b>63.837.839</b>	<b>61,6%</b>
<b>Sem. Emb.</b>	<b>Mercado a la llegada</b>	<b>VOL USA CL</b>	<b>Total Emb.</b>	<b>% USA</b>
45	Short & Steady	2.160	2.160	100%
46	Short & Steady	26.260	28.160	93%
47	Short & Steady	51.478	58.579	88%
48	Short & Steady	129.687	156.094	83%
49	Short & Steady	128.226	202.488	63%
50	Short & Steady	497.354	591.996	84%
51	Short & Steady	83.975	229.204	37%
52	Short & Steady	573.306	761.005	75%
1	Short & Steady	528.445	577.592	91%
2	Short & Steady	1.216.412	1.663.024	73%
3	Short & Steady	1.124.531	1.586.473	71%
4	Short & Steady	1.926.882	2.419.849	80%
5	Short & Steady	1.347.105	1.830.421	74%
6	Short & Steady	1.939.377	3.005.694	65%
7	Short & Steady	2.779.153	3.482.419	80%
8	Short & Steady	2.145.145	3.563.045	60%
9	Short & Steady	2.450.309	3.890.493	63%
10	Short & Steady	2.986.751	4.317.721	69%
11	<b>Over Supply</b>	<b>4.695.087</b>	<b>7.144.745</b>	66%
12	Steady	3.164.169	5.479.796	58%
13	Steady	3.423.385	6.442.670	53%
14	Short & Steady	1.674.461	3.502.532	48%
15	Steady	<b>3.812.694</b>	6.058.564	63%
16	Short & Steady	1.900.259	4.370.194	43%
17	Short & Steady	725.270	2.379.462	30%
18	Parcial	0	93.459	



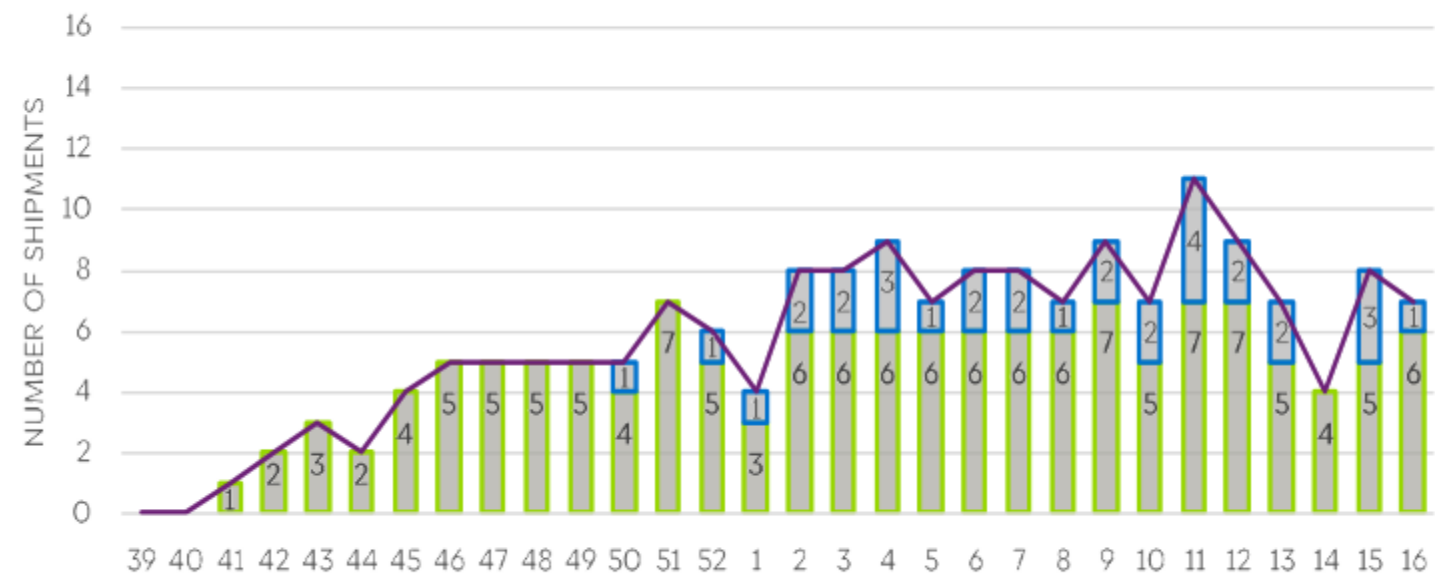
**43% del volumen  
enviado a USA en 5  
semanas**

Fuente: Servicio Agrícola y Ganadero - Estadísticas ASOEX (Frutas de Chile)



SHIPS PER DEPARTURE WEEK TO U.S.A.\*

Source: Frutas de Chile - Expordata.



\*Species: blueberries, cherries, stonefruits, table grapes.

■ Liner ■ Charter — Total

Report prepared exclusively by Decofrut and in conjunction with Frutas de Chile.

# NATIONAL FOB REVIEW

CHILE IMPORTS - PORT OF ENTRY  
PHILADELPHIA AREA

16-ene-2024

GRAPES: SUPPLY  
FAIRLY LIGHT.

DEMAND  
EXCEEDS  
SUPPLY FOR  
WHITE SEEDLESS  
TYPE, OTHERS  
MODERATE.

18 lb containers  
bagged FIRST  
REPORT.

15-feb-2024

Sales F.O.B. Shipping Point  
Basis - Prices in U.S.  
Dollars

GRAPES: SUPPLY VERY  
LIGHT FOR RED SEEDLESS,  
WHITE SEEDLESS TYPE  
FAIRLY LIGHT, OTHERS  
MODERATE. DEMAND  
EXCEEDS SUPPLY FOR  
RED  
SEEDLESS, OTHERS  
MODERATE. MARKET  
STEADY. Wide

range in price.

Precommitments at lower  
prices.

15-mar-2024

Sales F.O.B. Shipping  
Point Basis - Prices in  
U.S. Dollars

GRAPES: SUPPLY VERY  
LIGHT FOR WHITE  
SEEDLESS  
TYPE, OTHERS LIGHT.  
DEMAND EXCEEDS  
SUPPLY.

MARKET STEADY. Wide  
range in price.

Precommitments at  
lower  
prices.

15-abr-2024

Sales F.O.B. Shipping  
Point Basis - Prices in  
U.S. Dollars

GRAPES: SUPPLY WHITE  
SEEDLESS TYPE FAIRLY  
HEAVY,  
OTHERS FAIRLY LIGHT.  
DEMAND WHITE  
SEEDLESS TYPE  
FAIRLY LIGHT, OTHERS  
EXCEEDS SUPPLY.  
MARKET

STEADY. Wide range in  
price. Precommitments  
at lower prices.

01-may-2024

Sales F.O.B.  
Shipping Point  
Basis - Prices  
in U.S. Dollars

GRAPES:  
DEMAND  
MODERATE.  
MARKET  
STEADY. Wide  
range in price,  
quality, and  
variety.

Precommitme  
nts at lower  
prices.

# Mejoramos el “MIX” de variedades y calibres

CHILE IMPORTS - PORT OF ENTRY  
PHILADELPHIA AREA

Sales F.O.B. Shipping Point Basis - Prices in U.S. Dollars

GRAPES: SUPPLY VERY LIGHT FOR WHITE SEEDLESS  
TYPE. OTHERS LIGHT. DEMAND EXCEEDS SUPPLY.

MARKET STEADY. Wide range in price. Precommitments at lower prices. 18 lb containers bagged White Seedless Type **jbo** 36.00-42.00 mostly 38.00 occasional lower **exlge** 32.00-36.00 mostly 34.00-36.00 occasional lower **lge** 30.00-36.00 mostly 32.00-34.00 occasional lower Red Seedless **jbo** 34.00-40.00 mostly 38.00 occasional lower **exlge** 32.00-36.00 mostly 34.00-36.00 occasional higher & lower **lge** 30.00-34.00 mostly 32.00 occasional lower Black Seedless **jbo** 36.00-40.00 mostly 36.00-38.00 occasional lower **exlge** 30.00-36.00 mostly 34.00-36.00 occasional lower **lge** 28.00-34.00 mostly 32.00 occasional lower

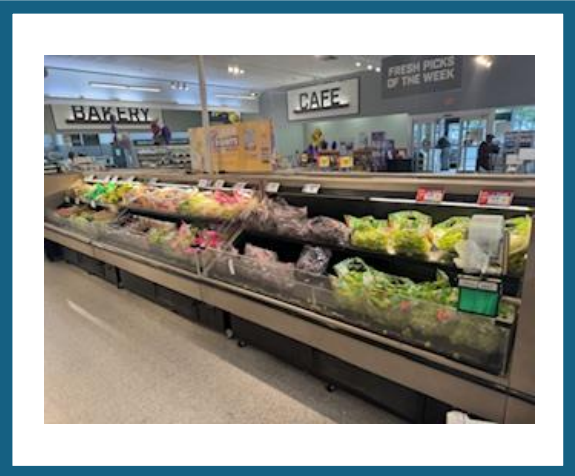
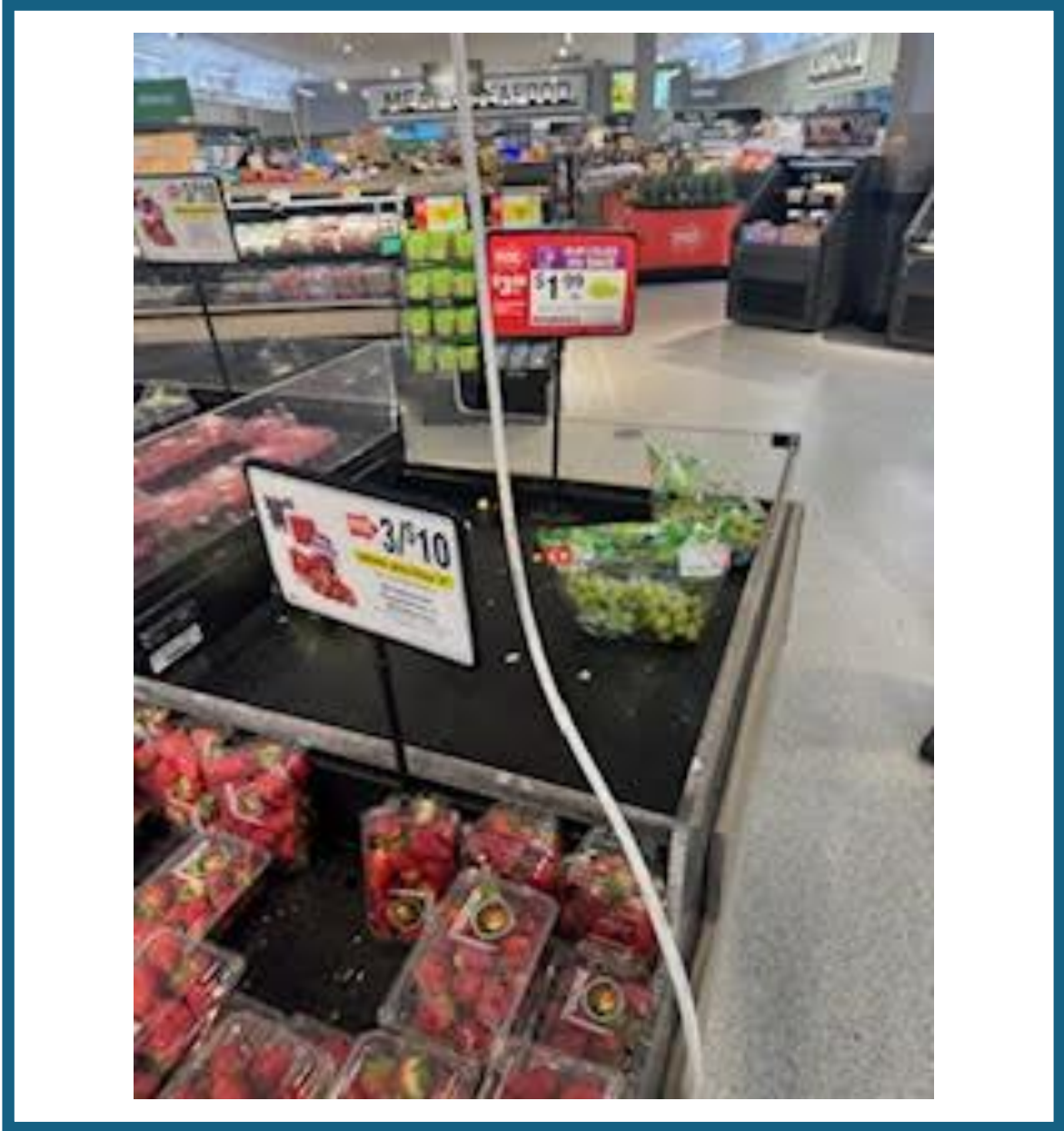
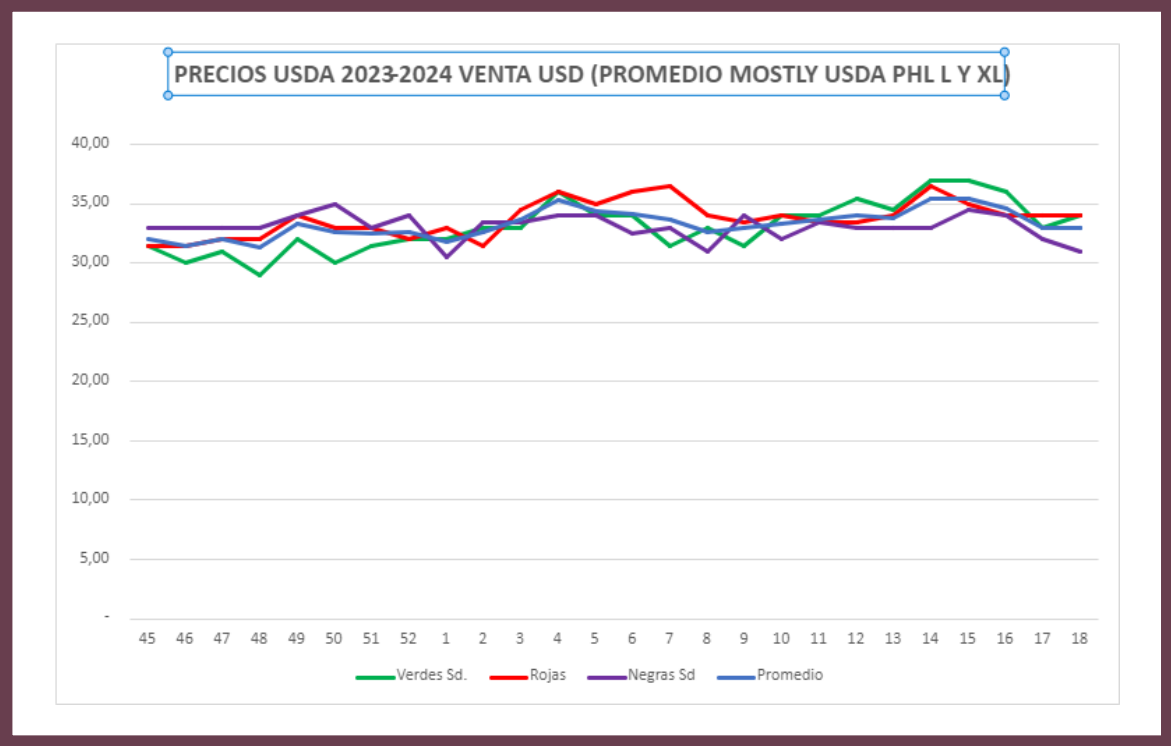
**NO HAY “M” EN LOS  
INFORMES DEL USDA, YA NO  
ES RELEVANTE.....**

# Estimación vs Real

	Verdes Sd	Rojas Sd	Negras	Con Semilla	Otras	Total
Estimación Chile	22.523.428	24.257.786	5.950.703	9.729.152	-	62.461.069
Cajas Embarcadas	23.267.780	24.079.940	5.908.118	9.121.959	1.460.042	63.837.839
<b>Por embarcar</b>	<b>- 744.352</b>	<b>177.846</b>	<b>42.585</b>	<b>607.193</b>	<b>- 1.460.042</b>	<b>- 1.376.770</b>
% Avance	103%	99%	99%	94%	0%	102%
<b>% Embarcado por tipo de uvas</b>	<b>36%</b>	<b>38%</b>	<b>9%</b>	<b>14%</b>	<b>2%</b>	<b>100%</b>

VARIETY	ESTIMATE	SHIPPED	TO BE SHIP.	Avance	
VARIEDAD	ESTIMACIÓN	EMBARCADO	SALDO		
RED GLOBE	9.729.152	9.024.629	704.523	●	93%
CRIMSON SEEDLESS	5.373.957	5.779.522	-405.565	●	108%
TIMCO	3.737.704	3.585.222	152.482	●	96%
ALLISON	4.064.244	3.639.385	424.859	●	90%
SWEET CELEBRATION	3.489.376	4.126.253	-636.877	●	118%
JACK SALUTE	1.011.907	844.780	167.127	●	83%
THOMPSON SEEDLESS	4.202.155	4.079.301	122.854	●	97%
SUGRAONE	1.173.396	1.207.349	-33.953	●	103%
ARRA 15	3.186.165	2.861.243	324.922	●	90%
TIMPSON	2.143.175	2.271.411	-128.236	●	106%
SWEET GLOBE	4.955.880	4.794.559	161.321	●	97%
AUTUMNCRISP	3.691.075	3.937.062	-245.987	●	107%
BLANC SEEDLESS	970.971	1.157.389	-186.418	●	119%
COTTON CANDY	1.003.259	1.248.006	-244.747	●	124%
AUTUMN ROYAL	1.269.751	1.228.396	41.355	●	97%
SWEET FAVORS	1.170.112	1.158.407	11.705	●	99%
SABLE SEEDLESS	1.377.220	1.574.760	-197.540	●	114%
OTRAS	9.911.570	11.320.165	-1.408.595	●	114%
<b>TOTAL</b>	<b>62.461.069</b>	<b>63.837.839</b>	<b>-1.376.770</b>		<b>102%</b>

Fuente: Servicio Agrícola y Ganadero - Estadísticas ASOEX (Frutas de Chile)



**U.S. Marketing Services**  
**Grapes**  
**Date: April 24, 2024**

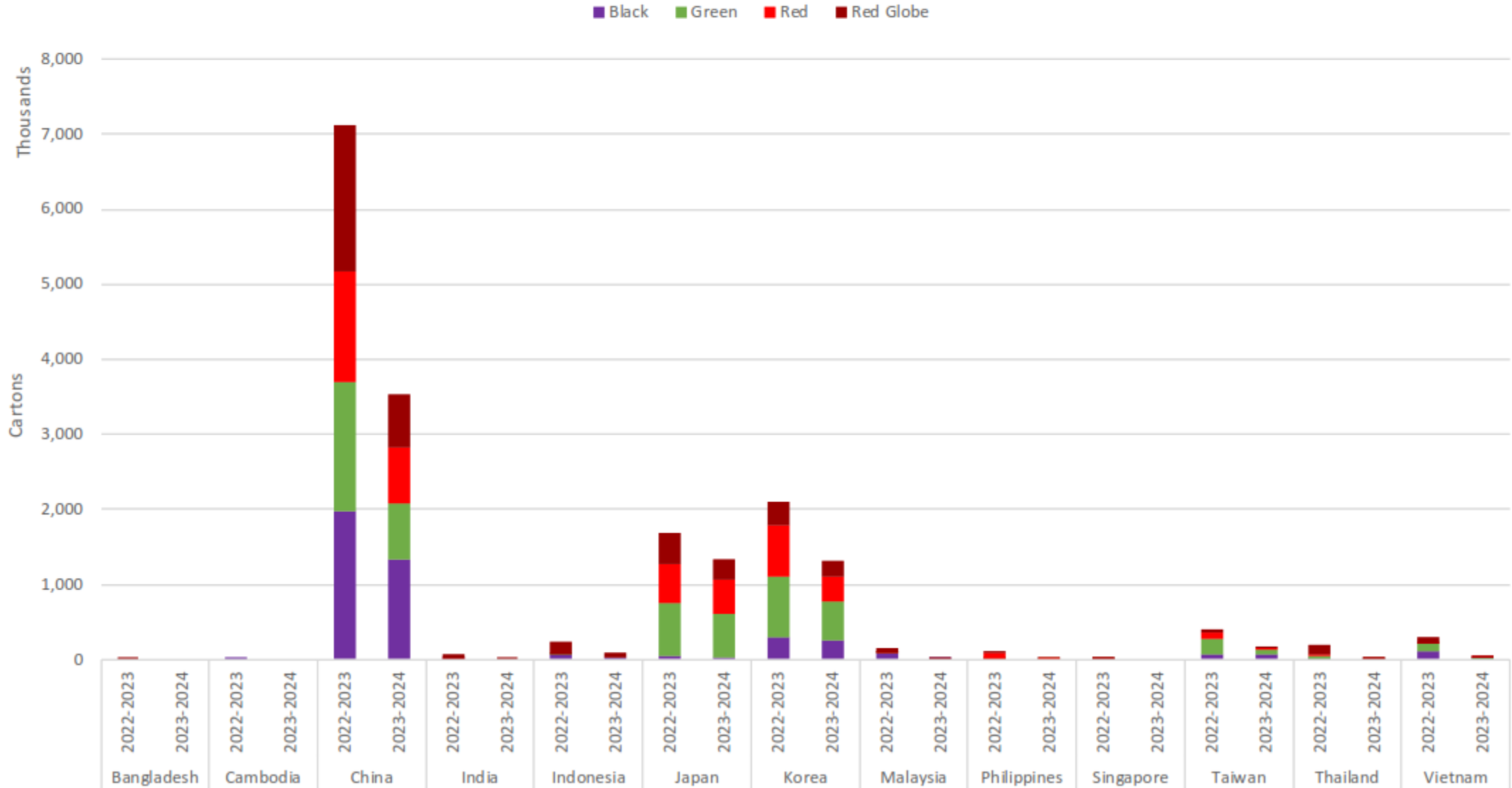
Origin	Chile	
<b>Tipo Uva</b>	<b>Precio Promedio / lb</b>	<b>Bolsas Vta Cja 18lb</b>
Black Seedless	3,24	58,32
Green Seedless	3,58	64,44
Red Globe	3,19	57,42
Red Seedless	3,38	60,84
<b>Total general</b>	<b>3,39</b>	<b>61,02</b>





# Chile Grapes to Asia.

Chile Grapes to Asia.  
(cumulative w15)





# Desafíos de la Temporada

- Canal de Panamá
- Tratar de cumplir los programas de peso fijo que estaban a precios inferiores al spot
- Mantener a nuestros clientes de otros mercados abastecidos que tenían precios más bajos
- Llegadas post marketing y términos del mercado U.S.A.



**PRECIOS USDA 2023-2024 VENTA USD**

(PROMEDIO MOSTLY USDA PHL L Y XL)

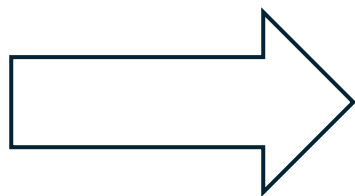
Semana 45 a la 18

<u>Verdes Sd</u>	<u>Rojas Sd.</u>	<u>Negras Sd.</u>	<u>Promedio</u>
32,73	33,66	33,11	33,17



**Descubrí algo. El futuro es impredecible.**

**- John Green**



**Descubrí algo. ¡Las temporadas son impredecibles y todas distintas!**

**- Christian Corssen**