

FOOD SECTOR

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DIARIES

Estrategia 14.08.2013

Colún, Watt's and Soprole concentrate 71% of cheese production

Highest production increasing were for Watt's and Alimentos Puerto Varas, with 43,9% and 22,5% respectively.

Three of the main country dairy companies represent 71% of cheese production, among the 11 industrial milk plants, between January and June. In total all plants summarized 29 million kilograms of production, with shares of 31% for Colún, 16% for Watt's and 19% for Soprole.

Regarding to positions, fall of Soprole during the first half from second to third place stands out.

In total cheese production reached 42 million kilograms, which represents an 8.7% increase, compared with same period last year.

	January-June		Var 13/12	% Sharing	
	2013	2012		2013	2012
Colun	13.049.350	11.934.704	9,3	31,1	30,91
Watts	8.899.986	6.183.164	43,9	21,21	16,01
Soprole	7.700.191	7.310.362	5,3	18,35	18,93
"	3.183.939	3.730.659	-14,7	7,59	9,66
Lácteos del Sur	2.012.136	1.798.755	11,9	4,8	4,66
Surlat	1.987,83	1.750.912	13,5	4,74	4,53
Lácteos Valdivia	1.765.928	2.110.130	-16,3	4,21	5,47
Quillayes-Peteroa	1.567.053	2.304.764	-32	3,73	5,97
Chilolac	833.064	764.161	9	1,99	1,98
Alimentos Puerto Varas	756.163	617.168	22,5	1,8	1,6
Lechera Bío Bío	201.209	-	-	0,48	-
Cumelen Mulpulmo	-	104.526	-	-	0,27
TOTAL	41.956.846	38.609.325	8,7	100,00	100,00

Source: ODEPA

Estrategia 09.09.2013

Chileans Are Who Consume More Per Capita Processed Meats in Latin America

8.1 kilos of processed meat consumed per capita in Chile, surpassing even the Argentines, reaching 7.4 kilos per person.

In the last five years, growth in processed meats among Chileans has increased 10.4%, reaching a total market up to 143,000 tons in 2013, according to Euromonitor International. With these figures, Chileans stand as the most consumed meat processed (canned and / or frozen) in Latin America, with a total of 8.1 kilos per capita, beating Argentine reaching 7.4 kilos per person. Moreover, statistics indicate PASO per capita consumption of beef in the country in 2012 is 22.4 kilos while you eat about 37 kilos of poultry and other 27 kilos of pork.

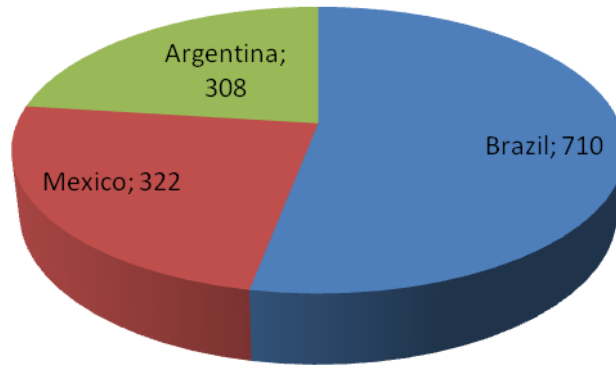
Domestic production currently reaches more than one million tons, according to figures from January to July 2013, where the leading poultry with more than 300 thousand tons. Imports, meanwhile, are more than 217 000 tons in the same period, and cattle that the highest participation, mainly brought from Brazil (52%), Argentina (22%) and Uruguay (10%). The pig, however, is the product most exported meat, exceeding 72 000 tons, mainly coming to Japan.

Imports (in tons, Jan-Jul 2013)		
	Volume	% Var. 13'/12'
Total bovine meat	79.435	18,8
Refrigerated bovine meat	73.563	15,8
Frozen bovine meat	5.872	75,5
Pork meat	19.057	69,2
Poultry meat	38.184	-1,6
Hamburgers	1.175	-21,9
Total	217.286	17,3

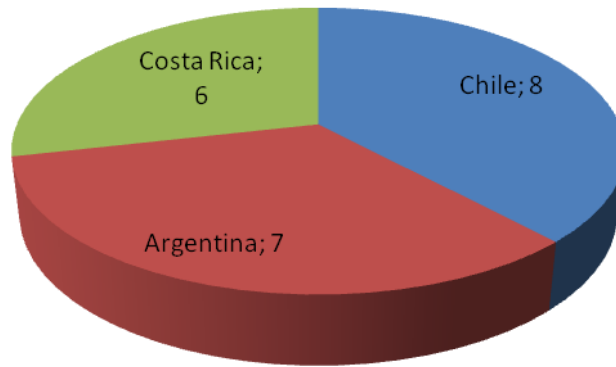
National production (in tons Jan-Jul 2013)		
	Volume	% Var. 13'/12'
Total poultry	337.641	-0,8
Broiler poultry	287.112	0,5
Total pork	276.884	-2,5
Total Bovine	103.044	2,4
Steer	58.599	7,2
Turkey	48.202	-6,4
Cow	21.885	-8,9
Total	1.133.366	-0,6

Exports (in tons Jan-Jul 2013)		
	Volume	% Var. 13'/12'
Bovine meat	1.008	0,9
Pork meat	72.707	0,8
Poultry meat	58.362	2,4
Hamburgers	1.261	50,2
Total	133.338	1,8

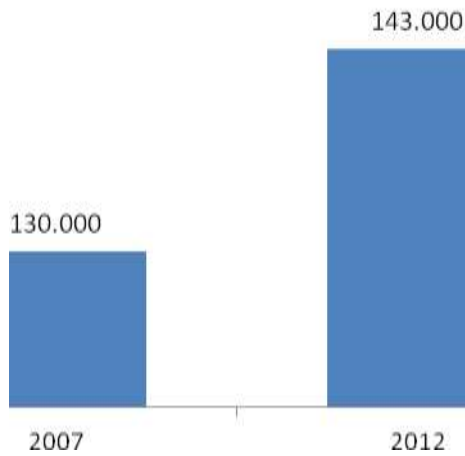
Total Market (1.000 tons)



Per capita consumption (kg)



Growth Sales in Chile (kg)



Estrategia 07.10.2013

Chileans are the seconds that more and Flavored Milk Powder Consume Per Capita in Latin America

Milk production in the country accounts for about 85 % of sales for the dairy industry, i.e. about 2,400 million liters of milk.

Over 150 liters of milk per person is expected to reach the Chilean consumption during this 2013 is projected per capita consumption Fedeleche. Also, powdered milk markets and flavored milk have grown over 46% and 47 % in the last five years, according to Euromonitor International. These markets citing Chile as the third largest in Latin America and Chile as the second most per capita consumers of these products. According to the president of Fedeleche, Juan Horacio Carrasco, this market currently offers "a range of high quality milk, along with a wide range of light products, probiotics, lactose free, low fat or extra calcium, among others," in response to the new demands of consumers. Milk production in the country accounts for about 85 % of sales for the dairy industry, i.e. about 2,400 million liters of milk, which are the basis of various dairy products sold. 374 million liters of milk in 2012 Chile exported. However, during the January-July period of 2013, exports down 14.3% compared to 2012, reaching 215 million liters.

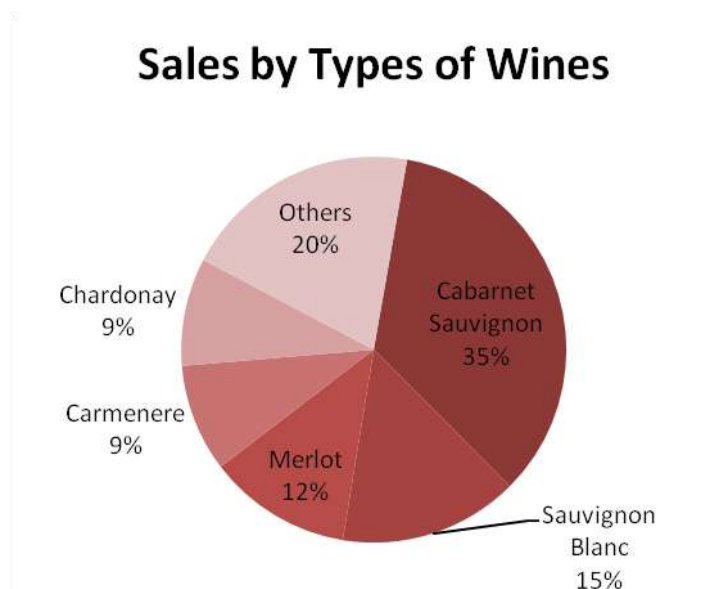
El Mercurio 12.08.2013

Wine production could reach record and price decrease is projected.

Red vines concentrate 70.5% of national production, lead mainly by Cabernet Sauvignon. While in whites is Sauvignon Blanc.

According to SAG report 1.282 million liters were produced in 2013, which duplicate volume in season 2003. This increase in production should decrease the wine price for some seasons, which could be avoided if exports grow strongly.

Production this year is a little higher than 2012 (2.1%), far from growth rates in previous years. For Pablo Silva for Vinos Chile minor growth rate especially for PDO (Protected Designation of Origin) is due to low profitability, high labor force and energy cost.



Source:SAG

High wine stocks and production had affected on in bulk prices. In some big vineyards prices could decrease up to 40%. Price will depend on northern hemisphere wine harvest which would affect imports.

Producers would be the most harmed sector due to low prices. Exporters of bottled wines will be favored with cheaper raw material, which will let them to recover historical margins.

Estrategia 16.09.2013

Wine consumption in Chile falls 15.3 % in Five Years

This, despite the fact that Chile has the third largest market in Latin America in this drink, with more than 212 million liters by 2012. If to this we add exports will exceed 1,060 million liters.

More than 1,060 million liters of wine produced in Chile, according to PASO, including both the domestic market and exports. In local trade, the market reaches about 212.9 million liters a year, establishing itself as the third largest market in this product at a regional level, after Argentina and Brazil, according to studies from Euromonitor International. However, this figure shows a fall of 15.3 % in five years, since in 2007 exceeded 251 million liters.

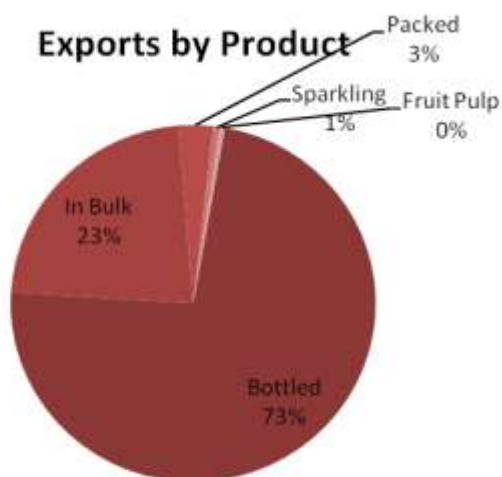
Currently, Chileans consume around 12 liters per capita, according to information from CCU to 2012, i.e. a liter less than in the previous year. It also happened in Argentina, and that in 2011 consumed 25 liters per capita, compared to 23 today. The Spanish, meanwhile, drink a liter less than a year ago, the Australians, a liter more, and the Americans, per capita consumption remain unchanged.

Finally, said the SAG, the harvest totaled 1.282 billion liters this 2013, which would result in an overall increase wine production, up 2.1% over the previous year.

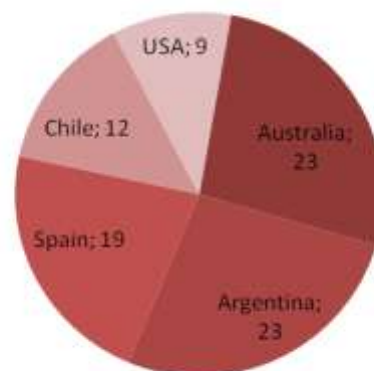
Exports

A 33.2 % exhibited growth between January and July 2013 exports wines of Chile in volume, according to the PASO, compared with the same period of 2012. This is due primarily to the increase in bulk wine exports (85 %), while bottled wine fell 3.1% in the volume of exports, although its average price improved 1.5 %.

The main destinations of exports during the first seven months of this year were England (14.4 %), United States (12.6 %), Japan (8.0%), Brazil (6.8 %), Netherlands (6.7%), China (6.2%), Canada (4.8%), Denmark (3.2%), Ireland (3.1%) and Russia (2.8 %).



Percapita Consumption of Wines (Lt)



LIGHT FOODS

El Mercurio 17.08.2013

Light products represent quarter of total food expenditures in homes. Families invest more than US\$600 yearly in these categories.

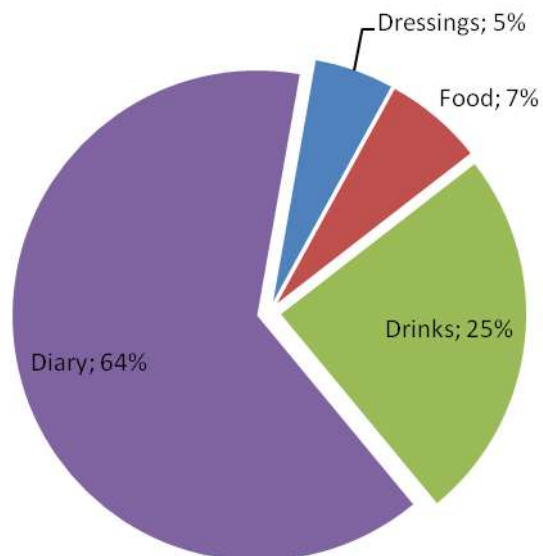
According to a Kantar Worldpanel research, Chile is the second country in region in light products consumption. 45% of families claim buying low calories products.

Most Chileans consume light products because of health reason and preference for premium products. Expenditures in this type of food have increased. If in period between July 2010 and June 2011 every home used, in average, US\$556 in low calories products, this average grew 11% for July 2013 to June 2013 period.

According to the same research Chile is the second country in light products consumption, after Argentina, where 54% of families claim to buy light products and followed by Peru and Venezuela with 35% and 32% respectively.

Dairies lead the preferences, representing 63.7% of light products expenditures per home. Second group of buying relevance is drinks with 24,5% of total. Another category within the light products is food. In this case jams have had biggest increase (10%) in home expenditures. In dressing area, mayonnaise is the most consumed.

Distribution of Light Products



Source: Kantar Worldpanel

Estrategia 22.07.2013

Pasta consumption has grown 29% in last 5 years

Chile is the third country in Latin America with highest expenditure and per capita consumption of pasta in region, reaching US\$14,2 of expenditures after Venezuela and Argentina, in first and second place with US\$23.5 and US\$20.7 respectively.

Pasta sales in Chile has grown 28.7% in value in the last 5 years, being US\$238.9 millions in 2012, while volume has increased only 3.5% in same period. This behavior is explained due to the consumers' preference for better quality products, expansion of premium segment and peso appreciation against dollar in the last five-year period.

Chile is located 7th among Latin American countries according to market size measured in total sales. It is leading by Brazil and followed by Argentina, Venezuela, Mexico, Peru, Colombia and Chile. Despite the pasta market size in Brazil exceeds Chilean market in almost 9 times, Chilean per capita expenditure exceeds 1.3 times the Brazilian one.

FAST FOOD

El Mercurio 19.08.2013

Chile is the second Latin American country with highest Fast food per capita expenditure

Country has increased 61.2% in fast food sales in the last five years.

With an expenditure of US\$40.3 per person, Chileans are the second fast food consumers in region, over Mexicans (US\$26.8 per capita) and just a little under Brazil (with US\$40.6 per capita).

According to a research made by Euromonitor International, most of the executives and office workers prefer this type of food because of short lunch time, affordable prices and nearby location.

Chilean fast food market totalizes US\$676.5 millions, being the third in region, after Brazil with US\$7.974.4 millions, almost 12 times bigger, and Mexico with sales 4 times bigger.

Estretegia 22.08.2013

Blueberries exports grew 31%

Avocado, however, suffered a significant drop of 59.5% in shipments to foreign markets.

A rise of 0.4% noted fresh fruit exports during the first half of 2013 compared to the same period of 2012, accumulating a total of 1,910,093 tons. This is evidence of a great recovery after a fall of 14% experienced in the first quarter.

Climatic factors were favorable in this, which offset good harvests in contrast to the situation in 2012, where weather elements affecting several regions of Chile, with rain and frost. While the June 30, table grapes was concentrated fruit that most of the national export 827 921 tones of total volume sent.

Initially, shipments of the latter were influenced downward by a delay in the start of the season and production problems in the Atacama and Coquimbo regions. The variety of Thompson Seedless also grew in its exports, which together with the varieties Red Globe and Crimson Seedless helped to increase the total volume of table grapes exported.

Blueberries recorded the largest increase in exports, with 31%, equivalent to about 68,970 tons. This rise is due to an increase in production as a result of advances in the state of plantation development under normal climatic conditions.

Meanwhile, plums grew by 10.5% through the dynamic Chinese market, to move to a 8.8% stake in Chilean exports of this fruit, the increased from 18.7% capturing, Additional Chilean shipments a high level of prices in that market.

As fall felt stronger the avocados with 59%, influenced by a deviation of the fruit export to the domestic market after the season of Hass varieties, as well as non-traditional markets such as Europe. The total exports of this fruit to June of this year were 16,216 tons.

La Tercera 02.09.2013

Close seasonal fruit: climate and unemployment affected port shipments

Locations with highest increase in volume: Europe and Canada with 6.3% and 19.3%, respectively. Last Friday ended the 2012-2013 season and fruit sector unions, the main factors were present and influencing the behavior of the production and export of fruits was the weather and the port shutdown last March-April.

According to figures from the Fruit Exporters Association (Asoex), Europe and Canada were the destinations that showed the highest growth in receiving fruit from Chile, with increases of 6.3 % and 19.3 %, respectively. Further back was located on the East Coast of the United States, with 5.6 %, and the Far East, with 3.3 %. Meanwhile, the largest declines were recorded in the West Coast of the United States (-16.9 %), Latin America (10.5%) and Middle East (-0.5 %).

In terms of total exports, the figure showed a slight decline. He went from 2,599,263 tons shipped in the 2011-2012 season, to 2,593,778 tonnes this season. This is a decrease of 0.21%.

By product, blueberries had one of the best performances during the season, showing an increase of 23 %. Later shipments were located plums (11.2%), kiwifruit (4%) and table grapes (3.8%). The other path, avocados recorded the biggest drop, with 35 %, followed by lemons (-29 %), cherries (-27), almonds (-28 %), European hazelnuts (31 %) and oranges (-24 %).

The president of the Fruit Exporters Association (Asoex), Ronald Bown, noted that "in global volumes, the season ending is very similar to last season, however, there will be a significant drop values , especially in grapes and blueberries but still there is no comprehensive data to signal a objective figure." Meanwhile, the president of the Federation of Fruit Producers (Fedefruta), Cristián Allendes, he said that "there can be described as bad the season, because it depends on the region in particular and each producer, as the industry is very diverse ".

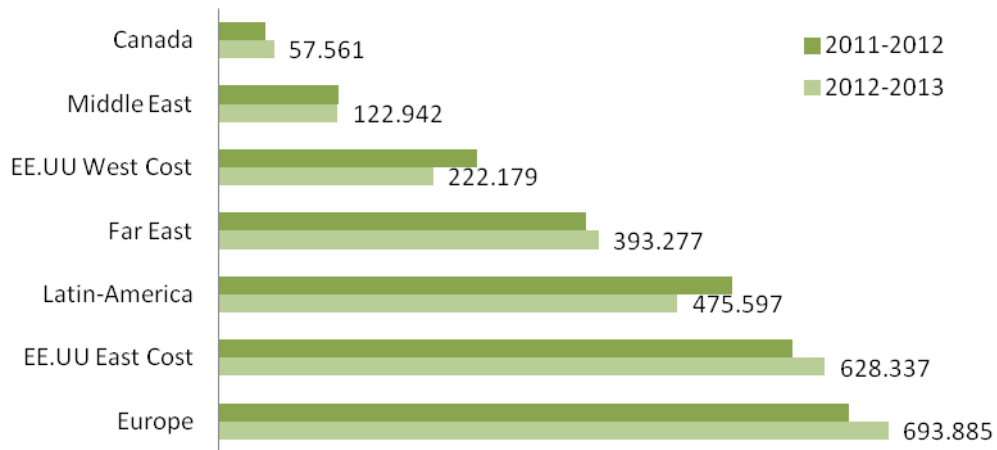
Bown added that " the two most important items, grapes and apples, showed a slight increase, however, grapes central region where higher volumes are produced, the target had complications due to decay resulting from rainfall summer, having to repack about two million cases, resulting in large additional costs to normal. This adds to the effects of unemployment port obvious damage that occurred in the marketing process. "

A paralyzing ports, according to the unions, had losses of about U.S. \$ 200 million, and problems in the arrival condition of the grapes, Cristián Allendes also added two other factors : " Drought in Region IV and some last December climatic factors affecting the production of cherries ".

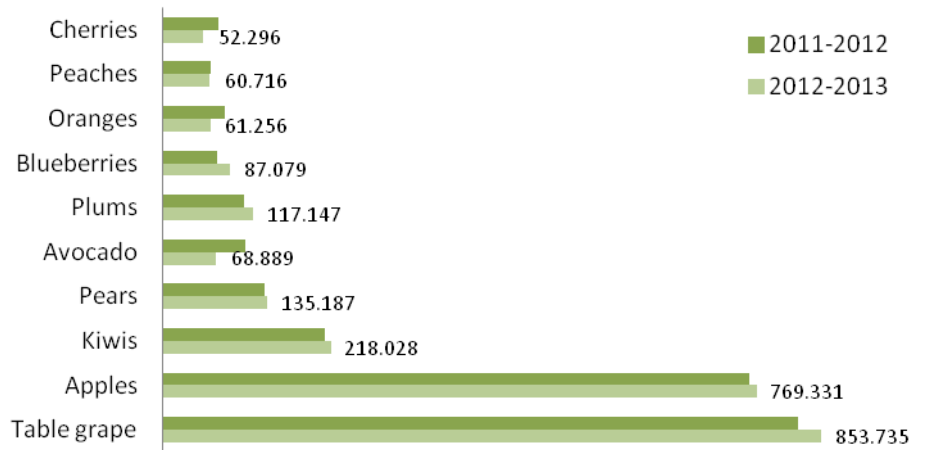
Bown explained that in the case of avocados, low shipments in response to " a significant increase in domestic market." He added that it is premature to make predictions for the 2013-2014 season, because of the fruit buds are just beginning, but warned that until October weather reports are very positive.

Allendes noted that " the main challenge facing producers is to improve the quality of the fruit, in order to obtain better prices abroad ". Also, the head of FEDEFruta added, " for next season, Chilean fruit must follow the process of consolidation in the Chinese market, especially in products such as avocado and nuts ".

Export Destinations (tonnes)



Export Items (tonnes)



El Mercurio 22.08.2013

Chileans consume mayonnaise 2.28 kilos per year

Mayonnaise consumption in Chile is similar to countries such as Lithuania, Russia and Belgium and ranks among the highest in the world. This was stated by a report from Euromonitor International that figure at 2.28 kilos per capita consumption in Chile in 2013. Thus, the country ranks ninth among the largest consumers in the world and exceeds Latin American per capita consumption of around a kilo. But that's not all, because the figures of Chile also allow you to position itself as the largest per capita market outside Europe.

David Mackinson, from Euromonitor, said that since 2012, sales in Chile grew by 6% in value, which reflects market interest in premium products. "Hellmann's Mayonnaise Supreme Unilever and Kraft are sold to more than double the cheaper and have a growth rate of 9% and 12%, respectively, in terms of volume in the last year," he says. Other trends that the consultant was recorded increased sales of light formats and flavored mayonnaise. For the future, the company expects lower growth in the category. This, because of greater health concern among consumers and the new law on food labeling to show the amount of fat.

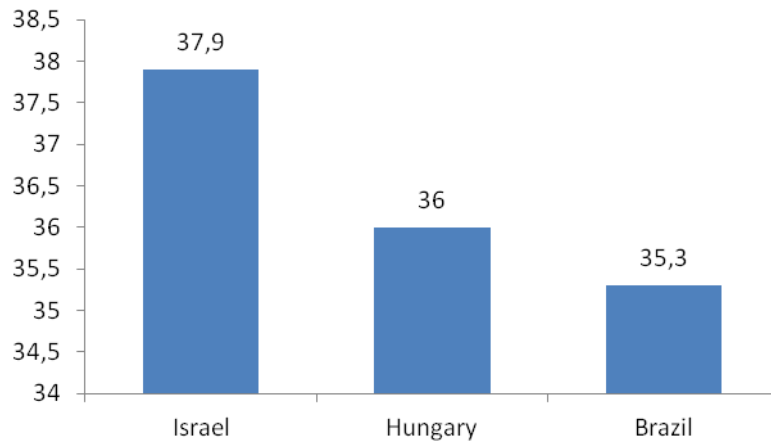
Estrategia 02.09.2013

Chilean Consume Nearly 2 Kilos Per Capita Sugar Less than Five Years Ago This trend is also reflected in the lower beet plantations in the country, which went from 27 000 hectares to about 18 thousand in the last five years.

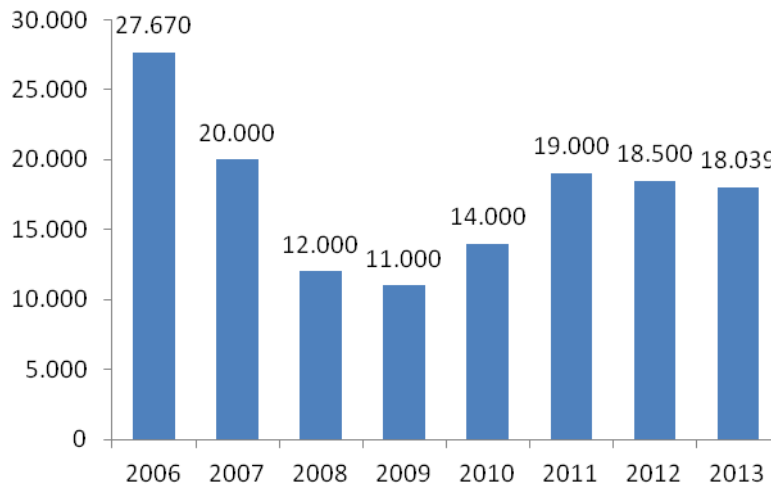
The consumption of sugar and sweeteners Chilean has fallen 3.4% over the past five years. This is indicated by the data collected by Euromonitor International, down at least about 13.4 tons in the sale of these products between 2007 and 2012. But this was a trend that seemed to anticipate as early as 2010, when the sugar market showed signs of stagnation due to the strong tendency of Chileans to consume low-calorie. Moreover, considering that the main Latin American markets are Brazil, Mexico and Colombia, with per capita consumption reaching 35 kg, 24.6 kg and 22.9 kg, respectively, Chile and has abandoned his former leadership consumption per capita in the region, since 2012 the figures show that it reaches just 21.7 Kg Chile.

Also, beet plantations in the country are the same trend and, if in season 2005-2006 these crops represent about 27 thousand hectares, and in 2012-2013 have been subtracted at least about 9000 hectares, according to figures from the PASO; being the Maule, Bío Bío and La Araucanía, the main producers of the raw material of sugar with 4,945 hectares, 12,370 hectares and 724 hectares respectively.

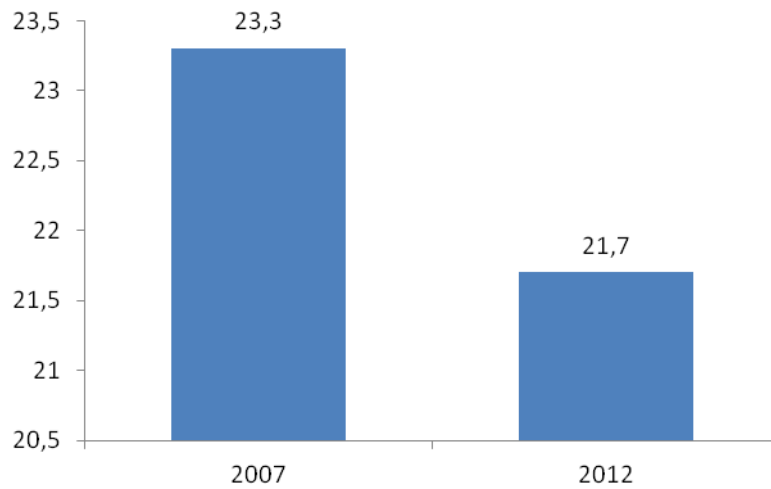
Main Sugar Consumers (per capita kg 2012)



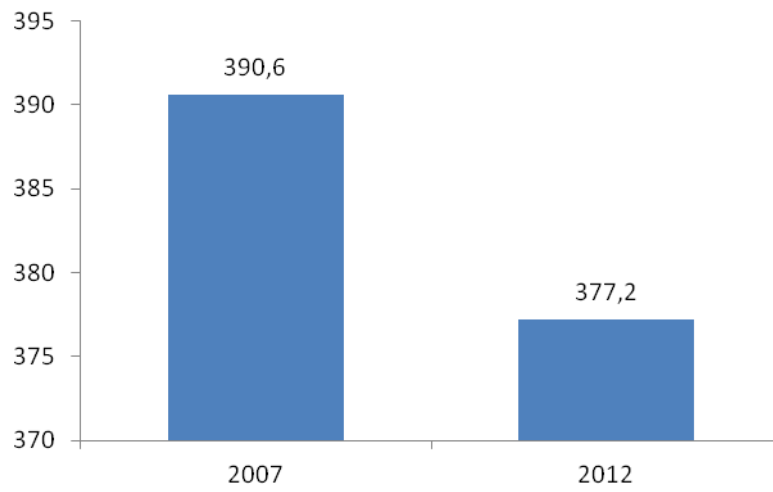
Beetroot hectares in Chile



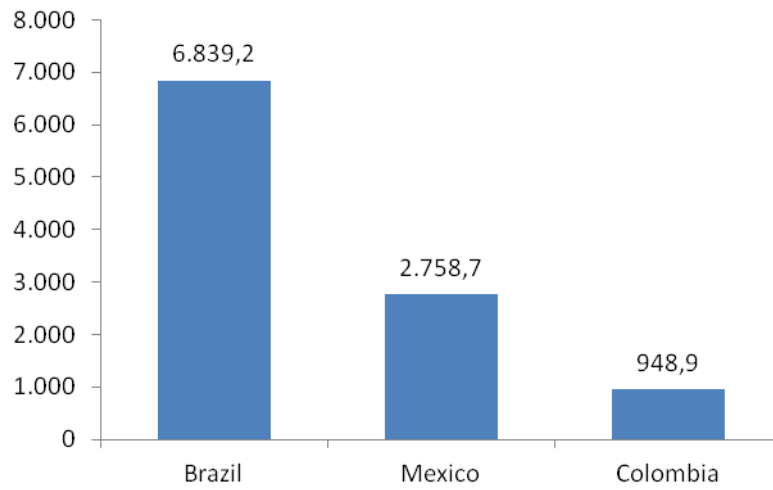
Per Capita Consumption



Sales in Chile (Thousands of Tonnes)



Sales in Latin Am. (Thousands of Tonnes)



WALLNUTS

El Mercurio 24.09.2013

5.000 tons of walnuts have been lost to frost

Low temperatures affect the production of the 2014 season, reducing the force with which had been growing exports of this product.

Almost 5.000 tones of nuts have lost the walnut industry during the national holiday week as a result of frost that fell during those days. As reported by the Association of Producers and Exporters of Nuts Chile (Chilenut) - portalfruticola

According to a first estimate of the damage, it was found that these were among the regions of Coquimbo and Bernardo O'Higgins, with particular strength in walnut plantations Serr variety, one of the most widespread in Chile.

The region with the greatest losses is the Metropolitan, with just over 2000 tons of fruits burned. In Valparaiso and Bernardo O'Higgins is estimated to have damaged thousand tons each. The Coquimbo region, meanwhile, submitted a low of 500 tons.

"The effects of frost were variable, even within the same area. There is slight damage orchards and others who lost more than 50 % of its production, "said Juan Luis Vial, President of Chilenut. "We believe this frost will affect output growth next year. Between 2012 and 2013 we estimate that the production grew 20 %, from 38 000 tons to almost 46 000. In 2014 we will not see such spectacular growth " he added.

The union said it will go as specifying the information it receives more data from the orchards of different regions of the country.

El Mercurio 24.09.2013

Chile rises in almost nine times surface olive oil production

Signatures for the category called to approve legislation that aims to regulate the activity. Olive oil has become increasingly common in the Chilean diet. Today, the production of olive trees can be displayed in various parts of the country. According to a report conducted by ChileOliva - association of many of the companies in the sector - planted hectares have gone from three thousand to 26 thousand in the period from 2003 to 2013, this is almost nine times in eleven years. Furthermore, in the industry expected to rise to 32 000 by 2020.

"Growth will respond experiencing upward plantation companies rigged the increase in marketing their products," said the general manager of the association, Gabriela Moglia. The Guild aims to close 2013 with 27,200 tons harvested. "The season for our organic produce was excellent in volume ". 2013 is 30 % higher than in 2012," says Felipe Cruz, general manager of Valle Grande, a firm linked to the Angelini group, which produces brands such as Olave and expects to sell U.S. \$ 10 million in 2014.

"This season we had a production of about two million liters, which meant a 25% increase over the 2012 season," adds the CEO Olisur - linked to the Swett family, Jose Pablo Lafuente. "We expect to close 2013 with sales of U.S. \$ 12 million" he added. The good performance of the industry is also a reflection of an increase in per capita consumption of the product. If in 2002, the estimated purchase amounted to 122 grams per person in 2014 expected to reach 850 grams to 900 grams up to 2020.

About 50 % of the olive oil production is exported. As of July have been sent abroad over U.S. \$ 18 million. And companies continue to add countries to raise those numbers. "The market we have opened with much success this year has been China. Projections we grow great there," he said in Valle Grande. "We have opened China, Korea, Guatemala, Costa Rica, Denmark, Sweden, Belgium, Germany, Finland and are finalizing negotiations to end the year in Mexico and Colombia," they add in Olisur. The latter group already has offices in Canada, U.S. and Brazil. 60% of industry shipments are sent to these two countries.

Legislation

That law passed to olive oil is the main challenge for 2014 industry displayed. In the sector is urgently ensure that regulations governing the activity. "We require the law to olive oil is approved and given a clear framework for the industry", highlighted in Valle Grande. "It is a shame that such a sensitive issue for domestic producers, our MPs invoke implausible arguments for not approving " Olisur complement. The project, which seeks to regulate the labeling and origin of oil - entered Congress in 2008, and is not yet law. Therefore, producers work in a seal of quality for the product.

SOFT DRINKS

El Mercurio 16.10.2013

Consumption grows 3.9% in soft drinks

Between January and September this year Chileans consumed 1.993 million liters of soft drinks, waters, juices and nectars, sports drinks and tea-based beverages, 3.9% more in relation to what is consumed in the same period last year above, as reported by the National Soft Drink Association (Anber). Francisco Diharrasari, Anber president, said that soft drink consumption accelerated during the third quarter, a period in which registered a growth of 6.1%, versus the 5.2% increase in the second quarter and the 1.1% during the first quarter.

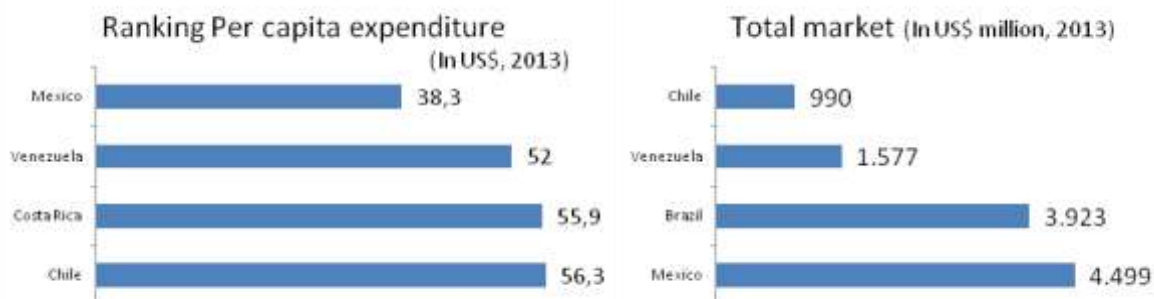
Estrategia 06.01.2014

They lead in Chilean Spending Per Capita Juices and Nectars

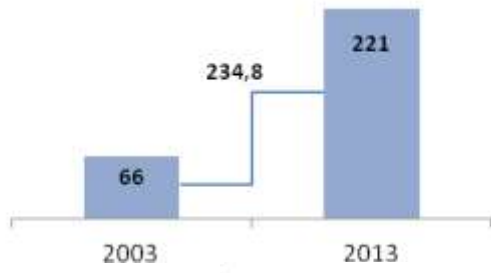
The total consumption of the population in these drinks has more than tripled in the last ten years. Although juices and nectars represent only 11.1% of the total of 1,993 million liters of processed liquids ingested Chileans, these consumption has grown by more than 3 times since 2003 to date. This is indicated by studies conducted by the National Soft Drink Association, ANBER showing that Chileans consumed 221 million liters in the third quarter of 2013, ie, about 12.6 liters per capita. Thus, sales of juices and nectars, would have grown 15.1% during the third quarter of 2013, compared to 2012. Similarly, as growing quantities ingested by the population, so does the size of the market, positioning Chile as the country with the fourth largest in Latin America, with U.S. \$ 990 million, with Mexico reached the lead with U.S. \$ 4,499 million, followed by Brazil with U.S. \$ 3,923 million.

However, Chilean highlighted in this regional market because lead in per capita spending on such products. So, Chileans are the biggest spenders in nectars and juices, positioning itself as pointers in category equivalent to spending \$ 56.3 per capita. Meanwhile, Costa Ricans are the second highest spending (U.S. \$ 55.9), followed by Venezuelans (U.S. \$ 52), according to Euromonitor International.

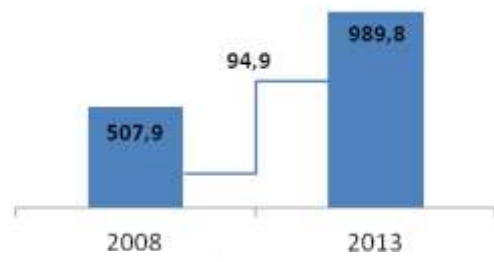
This segment within the total set of soft drinks market involved is the most important venture, after carbonated beverages, which account for 74 % of the total (1,481 million liters) third, and the waters, meaning the 13 % (267 million liters). The increase in market behavior is due to the preference of consumers towards healthier, natural foods, as well as a response from producers from the same phenomenon. All types of nectars and juices, whether frozen, natural, and even non-carbonated beverages and fantasy fruities are included in this category.



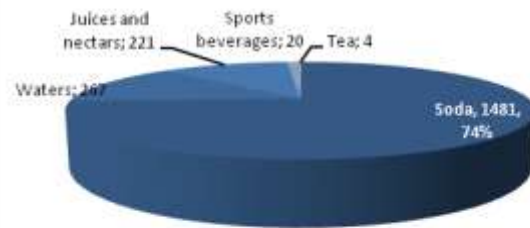
Total growth (Million liters, Jan-Sep every year)



Total sales growth (US\$ Million)



Sharing by categories (Million liters, Jan-Sep)



DRIED NUTS

Estrategia 09.12.2013

Dried Nuts Market is doubled in five years. It is a growing industry both within and outside the country. While Chileans are positioned as the second biggest spenders in these products, only in exports, the industry accounts for more than \$ 700 million. Reached \$ 77 million the total market of nuts and dried in Chile to 2013, following growth of 102.1 % in the last five years. This market is currently in the midst of a period of strong growth and international positioning, with exports reaching U.S. \$ 700 million. "During this year, the same government of Chile has defined this category of products will become one of the new flagship food export industries by 2015, as today it is fresh fruit, salmon and wine ", mentioned STRATEGY president Chilean Walnut Commission and Vice President of Chile Prunes Association, Andrés Rodríguez.

In addition, Chileans are the second biggest spenders in this kind of fruit, with a per capita expenditure amounted to U.S. \$ 4.4, second only to Venezuelans who invest U.S. \$ 8.9 per capita in these products, with a total market \$ 270 million. The third region spenders in dry and dehydrated fruits are Colombians, with U.S. \$ 4.1, in a total market worth U.S. \$ 197 million.

New Flagship Export Industry

According to Rodríguez account, this is an industry with great potential that has been growing very strong. Chile is now the number one exporter prunes in the world, with over 14,000 hectares planted, and the third largest exporter of nuts, with over 31,000 hectares planted. Also shows great potential in new species such as hazelnuts, of which there are already about 14,000 hectares planted, "will be a major player in the coming years " he says.

Only in exports, representing over \$ 700 million and it is estimated that by 2015 they reached \$ 1,000 million. The entire category of dried fruit, which corresponds to the sum of nuts (mainly walnuts, almonds and hazelnuts) and dehydrated (mainly dehydrated and prunes), has doubled its production in the last ten years. In nuts, exports account for about \$ 400 million, while dehydrated totaled U.S. \$ 300 million.

At the local level among the best selling fruits are nuts and plums, with over U.S. \$ 250 million and \$ 200 million respectively for the year projections. Followers' raisins, almonds and hazelnuts. To this have been added in recent years, dehydrated berries, tropical fruits, apples, which have expanded the market, although not representing prominent figures on consumption.

Tendencies

"The new consumer trends are to prefer healthy foods and dried fruit that line fits perfectly. For example, prunes have a very high content of antioxidants, potassium and fiber, which makes it a great health product. Walnut is also a product of high demand being high in omega 3 and antioxidants, "described Rodríguez.

In Chile, considering that much of the consumption of these snack is like, the two main sales channels are supermarkets, with about 50 % share, and specialize in dried fruit markets. "The category of dried fruit has been gaining more space on the shelves of supermarkets. In Chile is still a small room within the category, but in Europe, Asia, Middle East and Latin America, is a protagonist and large supermarket chain in any category, "he says. At least 95 % of what the country produces in this category is exported.

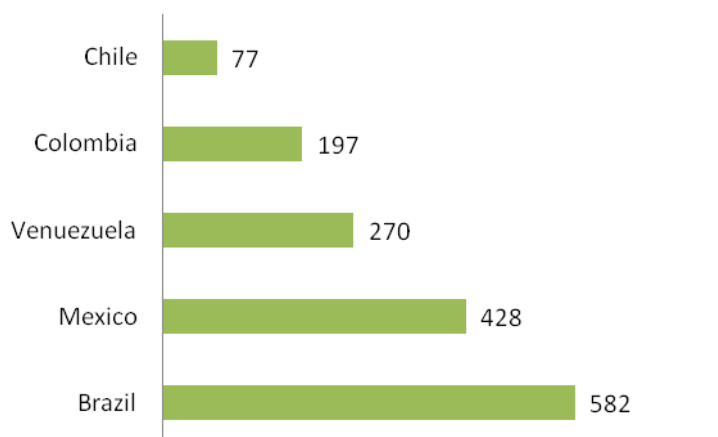
50 % Increase Production of Dried Plums

Chile has more than 14,000 hectares planted to dried plums, allowing exceed 65,000 tons of production. In the past five years, the industry prunes in Chile has increased its production by 50%, which positioned the country as the largest exporter in the world, with over 20% of world production.

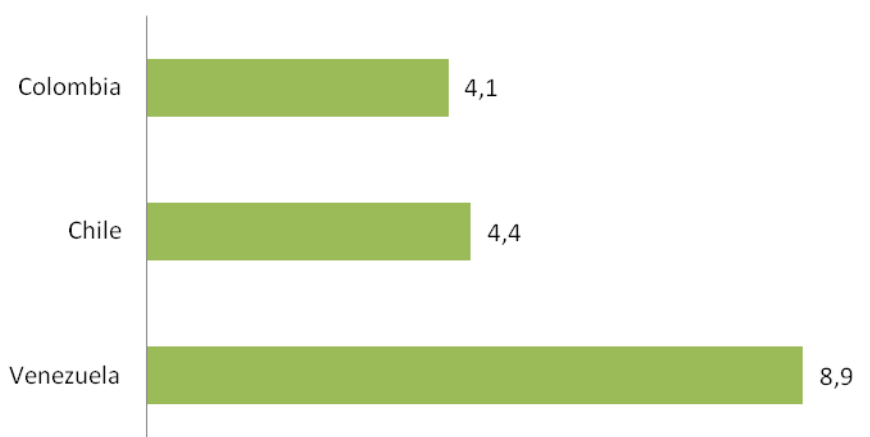
Imports (Jan-Oct.2013, Volume in Kg)		
	% var	
	2013	13/12
Dry plums	1.782.810	230,9
Raisins	1.738.173	-1,3
Dry coconut	1.202.199	-3,3
Dry fruits mix	226.949	-27,2
Peaches	197.796	37,2
Other dry fruits	117.754	57,9
Apricots	93.852	-16,5
Dry apples	60.735	7,4
Raspberries	13.001	78,6
Other dry blueberries	6.755	-15,8
Dry strawberries	6.302	-48,4
Dry roseship	5.166	-78,5

Exports (Jan-Oct.2013, Volume in Kg)		
	% var	
	2013	13/12
Raisins	54.544.972	-10,4
Dry plums	51.110.868	-18,5
Dry apples	4.453.367	-7,4
Roseship peel	3.193.411	8,9
Other roseship parts	994.020	-20,1
Dry roseship	652.340	167,2
Roseship seed	237.900	50,3
Peaches	127.156	3,5
Other dry fruits	118.383	20,2
Blueberries	56.724	-28,2
Strawberries	24.805	-67,4
Raspberries	10.432	-51,8

Total Market Size (Million US\$)



Per Capita Expenditure (US\$)



ICE CREAM

Estrategia 11.11.2013

Chileans lead Per Capita Expenditure in Ice Cream in the Region

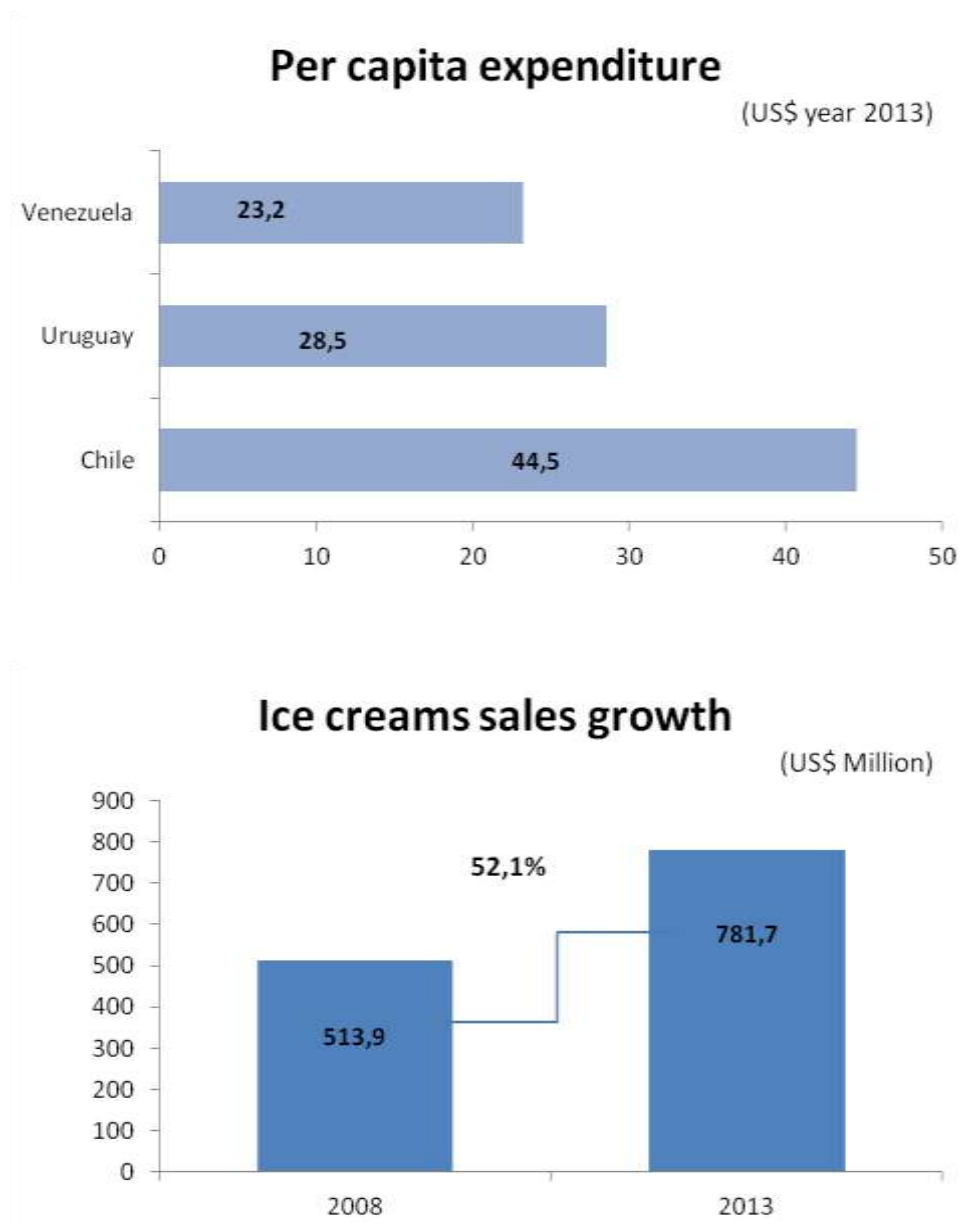
Chile also ranks as the second Latin American country to larger market, after Brazil totaled U.S. \$ 3,937.8 million.

Has grown 52 % ice-cream market in Chile, from U.S. \$ 513.9 million in 2008 to U.S. \$ 781.7 million in 2013, as indicated by recent studies conducted by Euromonitor International.

Thus, the country is the leader in the region with the highest per capita spending on such products, reaching about U.S. \$ 44.5 per person. So, Chilean exceed almost twice Venezuelans and more than 1.5 times the Uruguayans. Moreover, Chile is the second Latin American country with the largest ice cream market, after Brazil with U.S. \$ 3,937.8 million, followed by Venezuela with U.S. \$ 702.7 million.

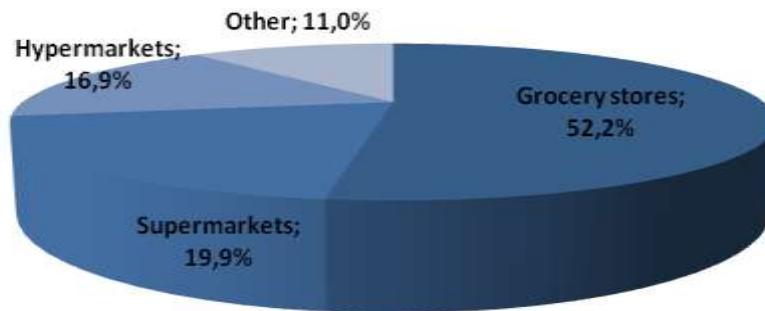
"Chile continues to lead the ice cream consumption in Latin America with more than 8 liters per capita," said a manager STRATEGY Business Development at Nestlé, Juan Antonio Iribarren. As mentioned, 51 % of total consumption is done with products to take home and 49 %, 'on the go'.

In addition, this segment has been highly promoted by the growth of the market for ice cream, which increased 57.5 % in five years, and where Chileans spend about U.S. \$ 10.6 per capita. "For the next year is forecast to continue developing concepts category most premium ice cream based on yogurt and ice cream strong channel development," said Iribarren.



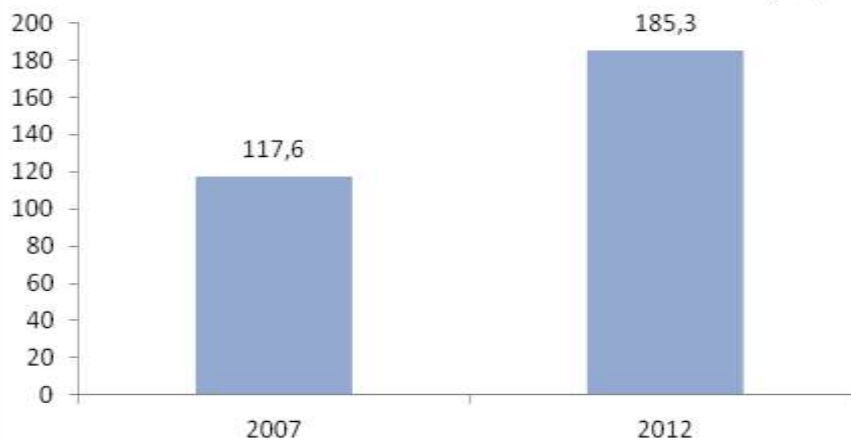
Distribution channels

(Year 2013)



Sales growth in Ice-cream shops

(US\$ million)



PROCESSED FOODS

Estrategia 21.10.2013

Chile is the third country in region with highest per capita expenditure in processed fruits

Only 15.7% of Chileans consume the suggested 5 portions of fruits daily and, according to data gathered by Corporación in ENS 2009-2010.

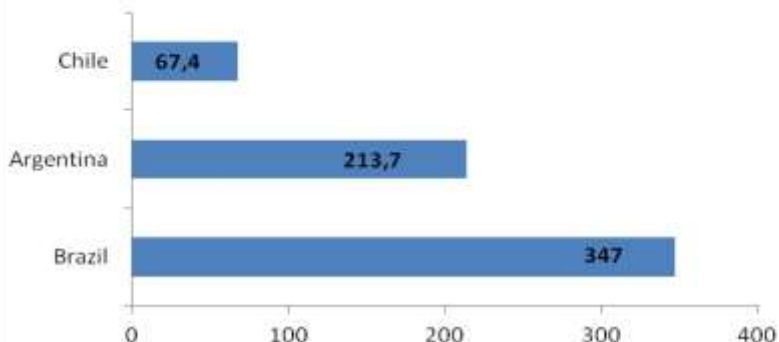
Despite of it, figures show an important increase, because 4 years ago estimation didn't overpass 178 grs. "Fruits consumption has increased in the last years in quantity, because more people could buy it " However, current trend in barely increasing and less than two persons of every 10 eat five portions daily " says Cristián Allendes, president of Fedefruta.

By contrary, consumption of processed fruits has increased 42.5% in five years, ranking Chile as the third country with highest per capita expenditure in these products in Latin America, reaching US\$ 3,8 in a market that exceed US\$67 million.

“More consumed fruits in Chile are banana (cheap fruit), apples, watermelons, melons, oranges, peaches and strawberries ” details Allende. Among those bananas and apples lead the market. 70% of these products is made in open markets and 30% in supermarkets.

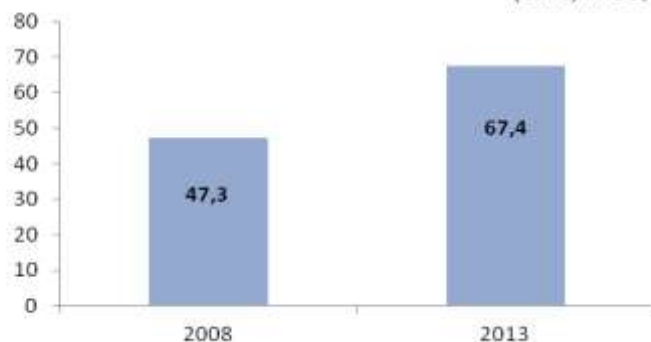
Market size for processed fruits

(US\$ million, year 2013)



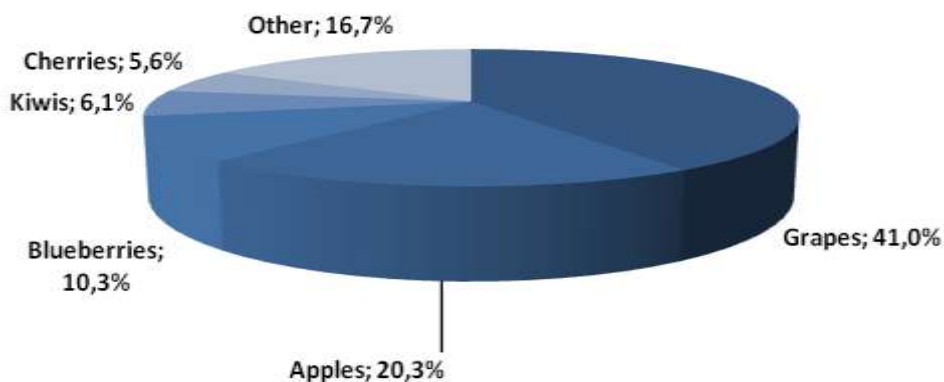
Processed fruit sales

(Chile, in US\$ million)



Exportation of fresh fruits

(% par. according to Jan-Aug 2013)



ISOTONIC DRINKS

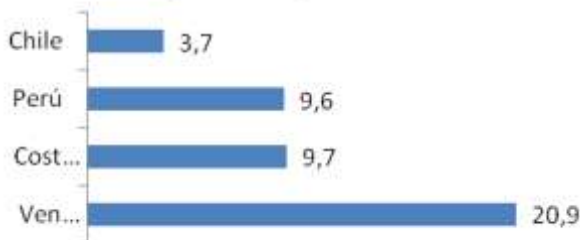
Estrategia 13.01.2014

Isotonic Drinks Market Grows Over 3 Times in Five Years

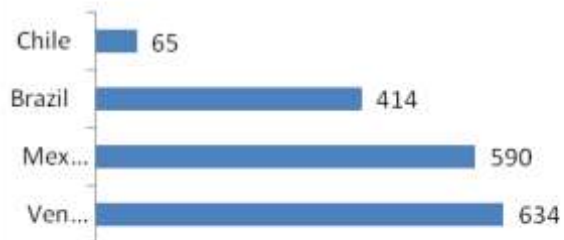
Between 2006 and 2007, the market reached its maximum development, expanding by 73.1 % annually. Although representing only 1.0 % of all soft drinks sold in Chile, according to the Soft Drink Association, Anber, isotonic drinks maintain a strong growth in the country. Thus, between January and September 2013 19.9 million liters of these drinks were sold, showing an increase of 33.1% over the previous year. Is that in the past 10 years, consumption of these rehydrating rose from 2% to 19.9%. Between 2006 and 2007, the market reached its peak, increasing by 73.1 %.

Thus, the Chilean market reaches U.S. \$ 65 million and a growth of 235%, while per capita expenditure is only U.S. \$ 3.7, according to Euromonitor International studies, pointing to a very consumer focused. However, this is a nascent market, which keeps Venezuela in Latin America as the leading country, reaching a total market of U.S. \$ 633.6 million and a per capita spending of \$ 20.9. Mexico is the second largest market in the region, with U.S. \$ 589.8 million, followed by Brazil, which has U.S. \$ 414.4 million in total. And in spending per person, the actors change: Costa Rica is the second Latin American country that spends more per capita on these beverages, \$ 9.7, and is followed by Peru with U.S. \$ 9.6.

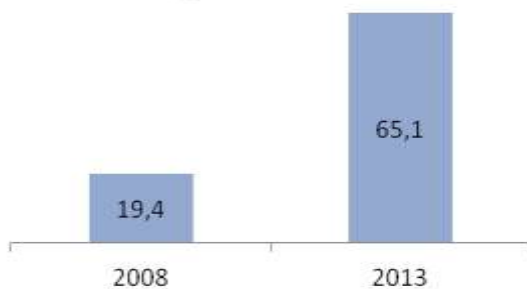
Per Capita expenditure (2013)



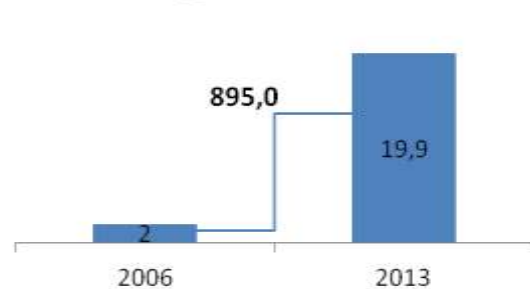
Total market (In US\$ million, 2013)



Total sales growth (In US\$ Million)



Total sales growth (In US\$ Million)



OLIVE AND OLIVE OIL

Estrategia 27.01.2014

Consolidation of Chilean Olive Oil Business

In 2013 the export volume reached 10,000 tons with a turnover of approximately U.S. \$ 42 million Fob value.

Although Spain, Italy and Greece account for the bulk of production and exports olive oil worldwide, the local industry has managed to open space in a market that has increased its consumption, delivering a product that according to their own manufacturers differentiated by quality.

According to data released by the Association of Producers of Olive Oil (ChileOliva) in 2013 the export volume reached 10,000 tons with a turnover of approximately U.S. \$ 42 million.

For the president of the institution and business and Commercial Agroindustrial Valle Arriba, Gaston Cardemil, the reason for this increase is that " demand is starting to exceed the global supply and increasingly, Chile is being recognized as a great Oil producer of extra virgin olive extraordinary quality. "

He added that consumption in Chile gained in the last 10 years by 1000 %. "Today we are almost 850 grams per capita, that is to say, 900 cc per person. In 1998 did not reach the 30 grams. "

"Olive oil is a product that after starting to consume is very difficult to leave it or change it, and that's a big plus, on the other side are all the positive effects of consumption for health" he said.

Data prepared by the Office of Agricultural Studies and Policies (PASO) further notes that exports increased from 54 tons in 2003 to 10,231 tons. registered in 2012, scoring a sales growth of 1,050 % over the past 5 years.

Thus, the national area planted with olive trees for oil production has also grown in recent years, from 4,800 reported in 2005 to 25,000 hectares in 2012, which would reach 32,000 in 2020.

In terms of average sales price, general manager of Quepu Olivares, Álvaro Reid explained that around U.S. \$ 6 per liter packaging and \$ 4 a gallon in bulk. For CEO Olivícola Valle Grande, Felipe Cruz, Chile and the world in the category grows in volume and value, marked by strong competition, " all who seek to participate in our space that growth."

Notably, the bulk of exports comes mainly markets such as Brazil and the United States, followed by Mexico, China, Japan, Colombia, Bolivia, Uruguay, Russia, Belgium, Canada, among others.

According to general manager of The Two Hundred, José Pablo Illanes, exports are lower than the European continent " that have their own production as self-sufficient and to Chile is very difficult to export to the European Union over the issue of tariffs."

On the other hand, stressed that Illanes difference olive oil with the Spanish national lies mainly in the quality. "In Spain the business model is different because they work with cooperative and there is no clear regulation of both what is extra virgin, virgin or lamp oil, then mix in general a lot of oil," the executive said.

Projections of main national olive producers

Felipe Cruz, general manager of Olivícola Valle Grande

In Olave, a brand of organic product it appears to be increasing the number of consumers that reward quality and organic attribute in the food they eat. In 2014 we expect total revenue around \$ 9.5 million. Also, expect to see an expansion of about 15 % in total sales volume. Similarly to our Guasco and Montecristo brands, we expect a growth of nearly 10% over 2013.

José Pablo Illanes, general manager of Las Doscientas S.A.

Expect sales volume to grow 30%. Regarding 2013 we hope to reach \$ 5.5 billion. On the production side we expect to grow in process machinery to expand our production capacity with an investment of nearly \$ 1 million. In our total sales, 60% are exports and 40 % for the national market.

Ried Alvaro, General Manager of Olivares Quepu

This year we have a projection of 15% growth in sales, we are also expanding the processing capacity by 50% and we are challenged to enhance our business pomace drying. Bill also budgeted about \$ 8 million and we expect to move 20 % more volume of olive oil. Meanwhile, we will invest \$ 1 million in improvements dump yard and a new process line.

Cardemil Gaston, owner of Agroindustrial Valle Arriba and Business

This year we hope to have a production of around 850,000 liters. with a turnover of approximately U.S. \$ 4.5 million. We are also acquiring new harvesting machines and investing heavily to maintain water flows north through intra-property pipes. We believe that investments should be around \$ 1.8 million. This year we will have zero growth by frost and drought.

CANDIES

Estrategia 28.01.2014

Spending Chilean sweets grows over 40 % in last five years Candy Thus, to date, has reached a total market of up to \$ 152.3 million.

8.7 \$ is currently the per capita expenditure of Chileans sweets. Is that despite the strong trend in consumption of healthy foods in Chile confectionery market grew 40.8% in the last five years, according to the latest research from Euromonitor International designed this 2013. Thus, to date, has reached a total market of up to \$ 152.3 million. Compared to the rest of the region, the Chilean market ranked sixth and seventh in per capita spending.

In this market, companies Carozzi and Arcor are the main actors. Meanwhile, Arcor Group is defined as the largest exporter of goodies from Chile, also have a presence in Argentina, Brazil and Peru. Moreover, in 2012 Carozzi estimated growth of the domestic market of sweets by 6.2 % in value, which was consolidated as Ambrosoli undisputed leader and a market share estimated at 59% in value, as detailed information Carozzi SA At that time, mention that the main expansion recorded soft candies and mints.

The main distribution channels of candy, fairs and markets accounted for 21.8 % of sales, while 31% exceeded stores and supermarkets 15%

