DDC
David Del Curto

Pears

Juan Domínguez, Sales Manager

The pear season began with harvests advancing by at least 10 days, which created better commercial expectations at the start of the campaign, especially for varieties such as **Summer Bartlett**, which reached prices between **USD 19.00 and USD 22.00 FOB per 18 kg base box.**

In the case of the **Coscia variety, national production recorded a drop of close to 20%, which has favored the performance of the European market,** particularly in Spain and Italy. The lower available supply has made it possible to observe attractive prices and smooth rotation, shaping a positive scenario for this variety so far.

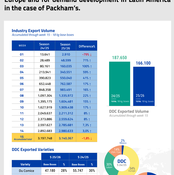
Meanwhile, the **Bosc** and **D'Anjou** varieties, which are traditionally destined for the Mexican market, **have come under pressure this season due to the stronger presence of U.S. fruit** in that destination, as a result of overproduction in that country. This situation forced part of the volume to be redirected to **alternative markets** such as Brazil and Ecuador, where prices have ranged between **USD 16.00 and USD 20.00 FOB,** slightly below the levels seen last season.

As for **Comice** and **Forelle,** both programs have shown **stable performance** so far, with good sales flow and sustained demand, maintaining outlooks similar to those of the previous campaign.

In contrast, for **Abate Fetel,** the scenario is more challenging. Europe, its main market, continues to hold high pear inventories, especially of Dutch Conference pears, which creates direct competitive pressure on our fruit. In this context, sales have been managed more cautiously, postponing parts of the commercialization in search of more favorable windows.

Regarding **Packhams,** prices remain at levels similar to last year. However, markets such as Colombia and Ecuador are currently showing high arrival volumes, so the commercial strategy is aimed at concentrating sales in later periods, always ensuring that the fruit maintains suitable condition for shipment.

Overall, the season presents a **mixed scenario, with occasional opportunities in some varieties and markets, but also relevant challenges, especially for Abate in Europe and for demand conditions in Latin America in the case of Packham's.**



Week	2024	2025	Differences
40	2,000	2,000	0.0%
41	28,480	48,500	71% ↑
42	90,000	160,000	78% ↑
43	300,000	550,000	83% ↑
44	390,825	615,000	57% ↑
45	510,000	760,000	57% ↑
46	858,300	980,000	14% ↑
47	1,050,000	1,310,000	25% ↑
48	1,185,170	1,834,487	55% ↑
49	1,500,000	2,300,000	53% ↑
50	2,044,827	3,015,510	48% ↑
51	2,573,000	2,550,624	-8% ↓
52	2,997,000	3,100,000	3.4% ↑
1	2,993,000	2,900,000	-3.0% ↓
Total	14,137,604	16,166,187	14.3% ↑

DDC Exported Varieties

Variety	2024/25		2023/24	
	Volume	Share	Volume	Share
Bosc	67,180	28%	55,767	30%
Comice	37,000	15%	27,000	14%
Coscia	27,114	11%	28,380	15%
Packhams Triumph	23,800	14%	21,372	12%
Summer Bartlett	12,347	7%	8,400	5%
Beurre Bosc	6,268	4%	10,356	6%
Forelle	5,484	3%	12,268	7%
D'Anjou	5,128	3%	12,472	7%
Total	186,162		186,162	

Source: Fruitrop de Chile, Export Data, and DDC's own analysis. Accumulated through Week(s) Sept. 1-5, Week 1.

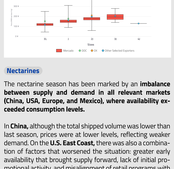
Stonefruit

Jaime Valdés, Sales Manager

D'Agen

For **D'Agen,** the season began with **active demand driven by the Chinese New Year,** a period that coincided with the first harvests and favored **air shipments of larger fruit with good color coverage.** Since the **volume peak was concentrated over two weeks,** importers chose to slow down the fruit's sales pace in order to maintain consumption continuous and avoid saturating the markets. However, this strategy did not generate an improvement in prices, as the market remained at levels similar to the averages seen during the peak weeks, without a meaningful recovery in the middle and later part of the season.

In terms of returns, **lower values than last season are projected,** mainly explained by **lower consumption associated with inflation and consumer purchasing power.** In addition, a slight increase in reported volume was observed (+4% compared with last season), which does not appear to have been a determining factor in market performance. Finally, as **David del Curto, we maintained our focus on the quality and consistency of our label,** segregating by sales format and label, which allowed us to achieve sales above the market average. In this context, the consumer, although more demanding due to the variety of alternatives available for consumption, **is still willing to pay a higher price for fresh fruit of exceptional quality.**



Nectarines

The nectarine season has been marked by an **imbalance between supply and demand in all relevant markets (China, USA, Europe, and Mexico), where availability exceeded consumption levels.**

In **China,** although the total shipped volume was lower than last season, prices were at lower levels, reflecting weaker demand. On the **U.S. East Coast,** there was also a combination of factors that worsened the situation: greater early availability that brought supply forward, lack of initial promotional activity, and misalignment of retail programs with arrival peaks. In contrast, the **West Coast** behaved more steadily, due to more moderate volumes compared with last season. Meanwhile, **Mexico,** which has become a relevant player within the category as part of the market diversification strategy, received significant volumes, which were reported at prices well below historical levels and far from projected levels, showing limitations in its absorption capacity.

In this global context, returns are expected to be even below last season for exporters with high exposure to the spot market and limited placement in fixed-price programs, highlighting the **need to adjust volumes and align production with real demand.** In our case, the reduction in our contracted volume, focusing on key growers, allowed us to minimize the risk of exposure to the spot market and place the fruit into programs.

Peaches

For peaches, now that the season has concluded, we can see **markets with mixed trends.**

On the one hand, **Mexico,** which this season showed erratic and particularly complex behavior due to the high exported supply and the strong concentration of volume in short windows, generated saturation at destination and pressure on prices. This resulted in returns well below historical averages in the middle and later part of the season.

In contrast, the **USA** showed a more stable price trend throughout the season, mainly due to a volume curve without as pronounced a peak as last season, which allowed proper product rotation. However, quality and condition upon arrival must be perfect; otherwise, there are no alternative outlets at reasonable prices.

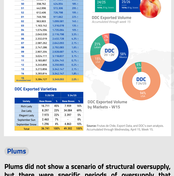
Finally, in **Brazil,** another relevant market for peaches, local stone fruit production occupied retail shelves and wholesale markets, driven by low selling prices, leaving room for imported fruit only in the latest part of the season.

Without a doubt, seasons like the current one **reinforce the importance of diversifying volume across the different consumer markets.**

Week	2024	2025	Differences
40	1,000	2,000	100% ↑
41	5,000	12,000	140% ↑
42	15,000	25,000	67% ↑
43	110,000	80,000	-27% ↓
44	150,000	150,000	0%
45	250,000	250,000	0%
46	410,000	310,000	-24% ↓
47	510,000	450,000	-12% ↓
48	610,000	580,000	-5% ↓
49	690,000	680,000	-1% ↓
50	810,000	800,000	-1% ↓
51	1,000,000	1,000,000	0%
52	1,150,000	1,150,000	0%
1	1,250,000	1,250,000	0%
2	1,350,000	1,350,000	0%
3	1,450,000	1,450,000	0%
4	1,550,000	1,550,000	0%
Total	9,860,000	9,860,000	0%

DDC Exported Varieties

Variety	2024/25		2023/24	
	Volume	Share	Volume	Share
Bosc Lady	6,171	25%	3,500	36%
Bosc Red	4,500	18%	2,000	20%
Bosc Regular	3,000	12%	2,000	20%
September Sun	2,000	8%	1,500	15%
Other Varieties	9,329	38%	1,000	10%
Total	24,500	100%	10,000	100%



Source: Fruitrop de Chile, Export Data, and DDC's own analysis. Accumulated through Week(s) Sept. 1-5, Week 1.

Plums

Plums did not show a scenario of structural oversupply, but there were specific periods of oversupply that pressured prices in different markets.

In **Europe,** performance was weak, affected by increased volume from South Africa and by logistical problems at that origin, which negatively impacted the condition and quality of the shipments that arrived.

In **China,** the situation was also complex, where Sweet Mary and some early varieties achieved attractive returns, while the rest of the varieties moved at low selling prices and with returns below last season. According to importers, this is partly explained by lower consumption associated with the weak momentum of the Chinese economy.

In the **USA,** the market remained with prices **above USD20** per box in the first part of the season, until the arrival of high volumes of black varieties, which created pressure in the market together with a drop in selling prices. In the latter part of the season, Angeleno plums have shown a premium in selling prices, driven by their better postharvest performance. Moreover, importers have remained cautious with fruit that must be fumigated upon entry into the USA.

In conclusion, **returns will depend on participation in each market and the variety mix, and, as usual, quality and condition remain a key driver for positioning fruit in the best orders and achieving prices above the market.**

Week	2024	2025	Differences
40	8,000	8,000	0%
41	15,000	15,000	0%
42	30,000	30,000	0%
43	50,000	50,000	0%
44	90,000	80,000	-11% ↓
45	150,000	120,000	-20% ↓
46	250,000	200,000	-20% ↓
47	350,000	300,000	-14% ↓
48	450,000	400,000	-11% ↓
49	550,000	500,000	-9% ↓
50	650,000	600,000	-8% ↓
51	750,000	700,000	-7% ↓
52	850,000	800,000	-6% ↓
1	950,000	900,000	-5% ↓
2	1,050,000	1,000,000	-5% ↓
3	1,150,000	1,100,000	-4% ↓
4	1,250,000	1,200,000	-4% ↓
5	1,350,000	1,300,000	-4% ↓
6	1,450,000	1,400,000	-3% ↓
7	1,550,000	1,500,000	-3% ↓
8	1,650,000	1,600,000	-3% ↓
9	1,750,000	1,700,000	-3% ↓
10	1,850,000	1,800,000	-3% ↓
11	1,950,000	1,900,000	-3% ↓
12	2,050,000	2,000,000	-3% ↓
13	2,150,000	2,100,000	-3% ↓
14	2,250,000	2,200,000	-3% ↓
15	2,350,000	2,300,000	-3% ↓
16	2,450,000	2,400,000	-3% ↓
17	2,550,000	2,500,000	-3% ↓
18	2,650,000	2,600,000	-3% ↓
19	2,750,000	2,700,000	-3% ↓
Total	28,000,000	27,000,000	-3.6% ↓

DDC Exported Varieties

Variety	2024/25		2023/24	
	Volume	Share	Volume	Share
Angeleno	97,188	19%	50,000	9%
Black Amber	75,000	15%	75,000	14%
Autumn Giant	75,000	15%	75,000	14%
Mariposa Blood	38,400	7%	35,000	6%
Mariposa Red	35,000	7%	35,000	6%
Mariposa Blue	35,000	7%	35,000	6%
Santa Rosa	30,000	6%	30,000	5%
Santa Rosa Gold	30,000	6%	30,000	5%
Sweet Mary	25,000	5%	25,000	5%
Other Varieties	60,000	12%	80,000	15%
Total	500,000	100%	540,000	100%

Source: Fruitrop de Chile, Export Data, and DDC's own analysis. Accumulated through Week(s) Sept. 1-5, Week 1.