# Country Market Study: Chile


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***Disclaimer***

***The Department of Agriculture, Forestry and Fisheries take no responsibility for any action taken from this study. This is a desktop study and own research must be undertaken, before decisions is made based on this study***

**SUMMARY**

This desk-top analysis shows that Chile, a South American country that gained independence from Spain in 1818, has a total area of 756,102 km2 (land 743,812 km2 and water 12,290 km2). Chile has a GDP per capita of $23,100 (2014 est.) and a population of 17,508,260 (July 2015 est.).

Chile's economic risk is ranked low; hence the country could manage to withstand the 2008/2009 global economic crisis, because of the sales/exports of its vast mineral resources. The country's infrastructural development is moderate, with energy, telecommunications and transportation systems ranked amongst the top 50 in the World.

Chile's trade, trade policies and trade relations are based on the WTO principles of openness, transparency, and non-discriminatory. Over and above being a member of the WTO, Chile is a member of various regional associations/agreement and is involved in some free trade agreements.

The country is self-sufficient in several agricultural products that include: apples, grapes, and pears, whilst it is not self-sufficient in beef, wheat, and corn (maize). Although Chile and SA are southern hemisphere countries sharing similar seasons, there is agriculture, fisheries and forestry trade taking place between the two countries.

A desk-top analysis using a trade-potential index (TPI) method reveals that SA has potential to export certain agricultural products to Chile.

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**Annexes**

## 1. Introduction

The study provides an overview of Chile's economic environment and market accessibility. The aim is to investigate the opportunities available for improving trade between South Africa and Chile on agriculture, forestry and fisheries (AFF) and to highlight current trade and the trade potential between the two countries.

The study is a desk-top research intended to give the reader an overview of Chile's economic and political environment, overall trade and trade policies, with the intent to highlight the possible opportunities, risks and barriers existing in that market.

Lastly the study gives conclusions of what was derived from the data analysis.

## 2. Historical Background[1]

Prior to the arrival of the Spanish in the 16th century, the Inca ruled northern Chile while the Mapuche[2] inhabited central and southern Chile. Although Chile declared its independence in 1810, decisive victory over the Spanish rule was not achieved until 1818. In the War of the Pacific (1879-83), Chile defeated Peru and Bolivia and won its present northern regions. It was not until the 1880s that the Mapuche were brought under central government control. After a series of elected governments, the three-year-old Marxist government of Salvador ALLENDE was overthrown in 1973 by a military coup led by General Augusto PINOCHET, who ruled until a freely elected president was inaugurated in 1990.

Sound economic policies, maintained consistently since the 1980s, contributed to steady growth, reduced poverty rates by over half, and helped secure the country's commitment to democratic and representative government. Chile has increasingly assumed regional and international leadership roles befitting its status as a stable, democratic nation. In January 2014, Chile assumed a two-year non-permanent seat on the UN Security Council.

Chile has historically been a country of emigration but has slowly become more attractive to immigrants since its transition to democracy in 1990 and improving its

[1] Central Intelligence Agency: World Fact Book, Chile
[2] indigenous inhabitants of south-central Chile and southwestern Argentina

economic stability (other regional destinations have concurrently experienced deteriorating economic and political conditions). Most of Chile's small but growing foreign-born population consists of transplants from other Latin American countries, especially Peru.

## 3. Country Facts[3]

Chile is situated in the Southern part of America, bordering the South Pacific Ocean, between Argentina and Peru, with a total area of 756,102 $km^2$ (land 743,812 $km^2$ and water 12,290 $km^{2)}$.

Chile has significant volcanic activity due to more than three-dozen active volcanoes along the Andes Mountains. The Atacama Desert in Chile is the driest desert in the world, which spreads across the northern part of the country, whilst the crater lake of Ojos del Salado is the world's highest lake (at 6,390 m).

Chile’s natural resources and environment are under threat of widespread deforestation and mining; air pollution from industrial and vehicle emissions; and water pollution from raw sewage.

Chile with a total population of 17,508,260 (July 2015 est.), is in the advanced stages of demographic transition and is becoming an aging society - with fertility below replacement level, low mortality rates, and life expectancy on par with developed countries. Nevertheless, Chile has a favourable age structure (i.e. 69% working age group, comprising of 15 to 64 year olds)[4]. It will need to keep its large working-age population productively employed, while providing for the needs of elderly people, especially women. Over the last two decades, Chile reduced its poverty rate, to lower than most Latin American countries. However, Chile has, according to the Organization for Economic Cooperation and Development (OECD), severe income inequality and unequal access to quality education.

[3] Central Intelligence Agency: World Factbook (2015)
[4] OECD: The working age population is defined as those aged 15 to 64

## 4. Economic Overview[5]

Chile with a GDP of $424.3 billion (2015 est.), and per capita GDP of $23 800, has an unemployment rate of 6.4%, with the labour force per sector of: agriculture (13.2%), industry (23%) and services (63.9%).The country's quick recovery from the2008/2009 global economic crisis was due to higher mineral prices, a sound financial system, and prudent management of economic policy which resulted in a fiscal surplus and a low level of borrowing. Despite an average annual GDP (real terms) growth rate of 3.6% between 2009 and 2014, Chile's economy slowed down in 2013 and particularly in 2014, to a real GDP growth of 1.9%. To counter this economic slowdown, the authorities adopted a more expansionary monetary policy to bring down interest rates and allow the peso (Chilean currency) to depreciate. Since Chile's good economic performance was not accompanied by investment in research and development, growth in productivity has been modest, due to shortage of qualified personnel. Trade liberalization policies, accompanied by changes to the regulatory framework for investment; adoption of a more far-reaching competition law; and efforts to improve the educational system, are steps that have been taken to improve productivity.

Chile's current account balance of payments is characterized by a traditionally surplus merchandise trade balance and a negative balance of services and investments. The trade surplus is highly influenced by fluctuations in the copper price on the export side, and domestic demand on the import side.

Chile's foreign direct investment (FDI) increased between 2009 and 2013 to US$100,856 million, from around US$17,455 million (i.e. nearly six times) in 2003-2008. Chile's FDI is distributed amongst the mining sector (45%), financial services sector, the electricity, gas and water sector, and the manufacturing industry.

[5] WT/TPR/S/315: Chile,2015

## 5. Infrastructure[6]

*Energy*

Chile produced approximately 66.89 billion kilowatt (kWh) of electricity (2012 est.), rendering it the 45th largest electricity producer in the World, whilst they consume 63.39 billion kWh (2012 est.), rendering them the 40th largest consumer in the world.

Chile produces 205,800 bbl/day (barrels/day) of refined petroleum products (2013 est.), rendering it the 53rd largest refined petroleum producer in the World, whilst they consume 323,300 bbl/day (2014 est.), making it the 40th largest consumer in the world.

This is an illustration that Chile is independent in terms of energy to produce and support its citizens.

*Telecommunication*

Chile is ranked 44th and 49th, in terms of fixed line telecommunication and mobile phones with 3.4 million and 23.7 million lines (2014 est.), respectively.

*Transportation*

In 2013, Chile had 481 airports (90 with paved runways and 391 unpaved runways). By 2014 Chile had 7,281.5 km rail transport, ranking 28 in the World, with only 1,691 electrified.

Chile had a total of 77,764 km Roadways (with 18,119 km paved and 59,645 km unpaved), in 2010, ranking 61th in the world.

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[6] CIA World Factbook

## 6. Risk Profile

*Economic Risk: Low*[7]

Chile is endowed with natural resources that include rich mineral deposits. The country is the world's number one producer of copper and iodine, and a substantial producer of gold and silver. The large decline in copper prices over the last few years has led to reduced investment from mining companies.

Inflation for 2015 was projected at 3%, largely as a result of lower commodity and energy prices. This was intended to bring inflation in line with central bank's targets of 3%±1%[8].

*Political Risk: Low*[9]

President Bachelet's second term would continue to implement reforms aimed at improving social standards in areas such as labour and health, with a special emphasis on education. The ruling coalition maintains a majority in Congress, which enables the passing of such legislation to be smooth.

A challenge for the government going forward will be to address social inequalities, while maintaining a business friendly environment and investor confidence.

Chile's government has adhered to prudent public finance management practices that have kept public debt and recent budget deficits under control.

Several corruption cases have put the government under pressure to increase transparency and restore confidence. The cases relate to alleged illegal campaign financing to politicians. In response, the government has announced several anticorruption measures.

[7] IMF World Economic Outlook and A.M. Best, Chile, 2015
[8] www.centralbanknews.info
[9] IMF, Axco, Swiss Re and A.M. Best, Chile, 2015

Civil unrest and protests by students, trade groups and indigenous organizations remains an ongoing challenge.

*Financial System Risk: Low*[10]

Since 2004, the Chilean financial sector has been ranked as large, diversified, and increasingly integrated with the rest of the world. It has shown remarkable growth throughout the last two decades and is now the largest (in terms of GDP) and among the deepest in the region when taking into consideration other financial indicators in addition to the GDP. The core of the financial system is the banking sector and the mandatory, privately administered pension system. The pension system is one of the largest in the world (only 8 OECD countries have comparable pension assets)[11].

Chile's financial sector is among the most developed and stable in the region. The legal framework and enforcement is largely impartial and professional. Chile ranks 41th out of 189 countries in the World Bank's 2015 Doing Business survey.

## 7. Bilateral, Regional & Multilateral Trade Agreements

Chile is one of the associate member countries of MERCOSUR, other associated member countries are Bolivia, Colombia, Ecuador and Peru. MERCOSUR (the South American trade block) was signed in 1991 and is composed of five member states: Brazil, Uruguay, Argentina, Paraguay (suspended) and Venezuela (acceded in 2012, July).

Chile is also a member of the following economic and trade communities:

- *Asia-Pacific Economic Cooperation (APEC)*

[10] AMB Country Report, 2015
[11] International Monetary Fund: Washington, D.C 2011.

Chile has been a member of the Asia-Pacific Economic Cooperation (APEC) forum since 1994. The developed-country members of APEC undertook to liberalize trade (i.e. removal or reduction of tariffs and non-tariff barriers like licensing rules, quotas, standards and other requirements) in goods and services in the Asia-Pacific region by 2010, while developing-country members will do so at the latest by 2020. Chile has undertaken to liberalize its goods and services trade by 2010 in line with the APEC's developed members.[12] According to the Chilean authorities, this objective has been fulfilled as an outcome of the trade agreements signed by Chile, which have resulted in an average preferential tariff of roughly 1%, and because Chile maintains open services trade and investment regimes, with very few exceptions.

- *The Trans-Pacific Strategic Economic Partnership (P4)*

The P4 was initially started with the signing of a Free Trade Agreement between Brunei Darussalam, Chile, Singapore and New Zealand on 18 May 2005, and entered into force on 22 July 2009. The P4 evolved into the Trans-Pacific Partnership with the addition of the USA, Australia, Peru, Vietnam and Malaysia.

- *Trans-Pacific Partnership Agreement (TPP)*

The Trans-Pacific Partnership Agreement (TPP) is a free trade agreement currently being negotiated by 12 countries[13], which covers a wide range of issues. The TPP seeks to manage trade, promote growth, and regionally integrate the economies of the Asia-Pacific region. It further intends to enhance trade and investment among the TPP partner countries, promote innovation, development, and support the creation and retention of jobs.

- *Union of South American Nations (UNASUR)*

UNASUR (signed in 2008), with the goal of enhancing regional economic and political integration. It comprises of Chile, Brazil, Colombia, Ecuador, Argentina, Bolivia, Guyana, Paraguay, Peru, Suriname, Uruguay and Venezuela.

[12] The list of APEC members is available at: http://www.apec.org/About-Us/About-APEC/Member-

[13] Trans-Pacific Partnership Agreement (TPP) economies: *Australia, Brunei Darussalam, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, United States and Vietnam*

- *Organisation for Economic Co-operation and Development (OECD)*

In May 2007, Chile was invited to join the Organisation for Economic Co-operation and Development (OECD). Between December 2007 and November 2009, Chile and the OECD exchanged necessary information and notes required for accession to the Organisation to ensure compliance. In January 2010, the Agreement on the Terms of Access of the Republic of Chile to the Convention on the OECD was signed; and Chile formally became an OECD member on 7 May 2010, when it deposited its instrument of accession.

- EU-Chile RTA

The EU and Chile concluded negotiations in 2002 for an EU-Chile Association Agreement, which covers all parts of the EU's trade with Chile as well as an improved structure for political dialogue and co-operation in areas of mutual interest.

The Agreement liberalises trade in all industrial goods as well as in over 90 per cent of agricultural, processed agricultural and fisheries products.

## 8. Agricultural, Fisheries, and Forestry Profile

### 8.1. Agricultural Production and Consumption

Chile's major Agricultural crops and products include Apples, Pears, Grapes, Peaches, Wheat, Corn, Poultry, Fish, Beef, Onions, Beans, Wool, Garlic, Oats, Asparagus and Timber.

### 8.1.1 Poultry

**Table 1: Chile Broiler Meat (Poultry) production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency[14] |
|---|---|---|---|
| 2009 | 508 | 459 | 111 |
| 2010 | 499 | 487 | 102 |
| 2011 | 556 | 540 | 103 |
| 2012 | 566 | 545 | 104 |
| 2013 | 578 | 563 | 103 |
| 2014 | 567 | 567 | 100 |
| Average | | | 103 |

**Source: United States Department of Agriculture**

Table 1 above shows Chile's production and consumption of Poultry. Between 2009 and 2013 Chile's production of Poultry was slightly more than its consumption. From 2014 Chile's production and consumption of Poultry have been in equilibrium. On averages between 2009 and 2015, Chile has shown a marginal self-sufficiency in the production of Poultry. An increase in poultry production has resulted to an increase in its values of exports above that of imports see figure 1 above.

Figure 1 above below shows Chile's poultry imports and exports between 2009 and 2014. From 2009 to 2013 Chile was a net exporter of poultry to the world.

[14] For the purpose of this paper and analysis, self-sufficiency is taken as the ratio of production to consumption (i.e. P/CX100). For example if self-sufficiency is 2%, then production only covers 2% of requirement; if ration is 124%, then there is surplus of 24%)

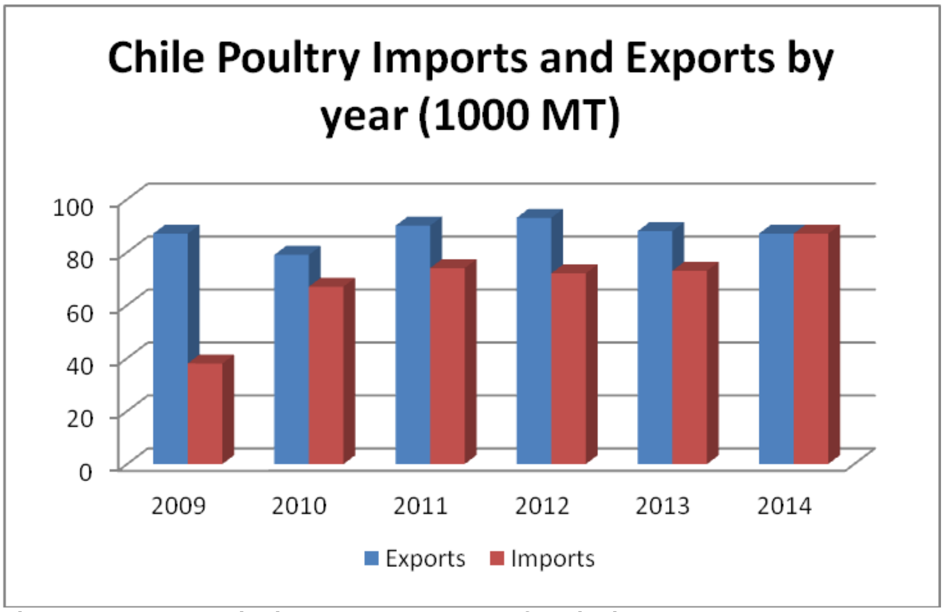


**Figure 1: Source: United States Department of Agriculture**

### 8.1.2 Beef and Veal meat

**Table 2: Chile's Beef and Veal Meat production and consumption by Year (1000 MT CWE[15])**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 210 | 368 | 57 |
| 2010 | 211 | 391 | 57 |
| 2011 | 191 | 363 | 52 |
| 2012 | 198 | 380 | 54 |
| 2013 | 206 | 446 | 56 |
| 2014 | 224 | 459 | 61 |
| Average | | | 56 |

**Source: United States Department of Agriculture**

Table 2 above shows that on average from 2009 to 2015, Chile's beef production was only 56% of the required consumption. This indicates that Chile is not self-sufficient in the production of Beef; hence the values of its imports were greater than that of its exports as shown in figure 2 below.

[15] CWE stands for "Carcass Weight Equivalent CWE", It is the measurement of livestock production

Figure 2 below shows that between 2009 and 2014 Chile's value of beef imports has been increasing while that of beef exports has been decreasing. Indications are that Chile depends on beef imports to sustain its consumption

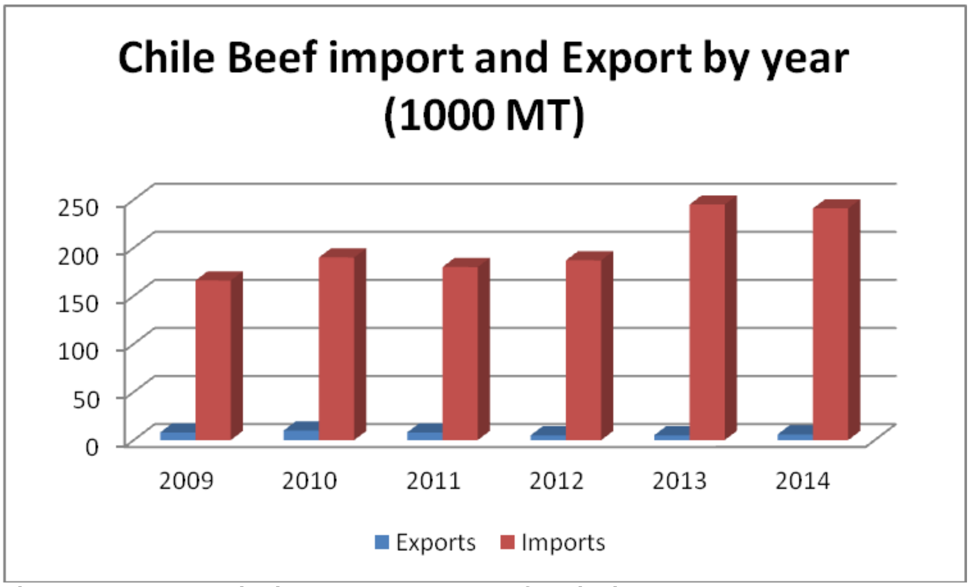


**Figure 2: Source: United States Department of Agriculture**

### 8.1.3 Wheat

**Table 3: Chile's Wheat production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 1524 | 2300 | 66 |
| 2010 | 1576 | 2275 | 69 |
| 2011 | 1114 | 2310 | 48 |
| 2012 | 1475 | 2300 | 64 |
| 2013 | 1360 | 2275 | 59 |
| 2014 | 1620 | 2325 | 70 |
| Average | | | 63 |

**Source: United States Department of Agriculture**

Table 3 above shows that, on average, there is a Wheat deficit in Chile. From 2009 to 2014 the production of wheat has been decreasing while the consumption has been increasing. Chile's wheat production for the period 2009 to 2014 had on average been 63% deficient of consumption. Chile is a net importer of wheat, see figure 3 below.

Figure 3 below shows that Chile depends on Wheat imports to supplement its wheat consumption, as depicted in table 3 above, that Chile is not self-sufficient in wheat production.

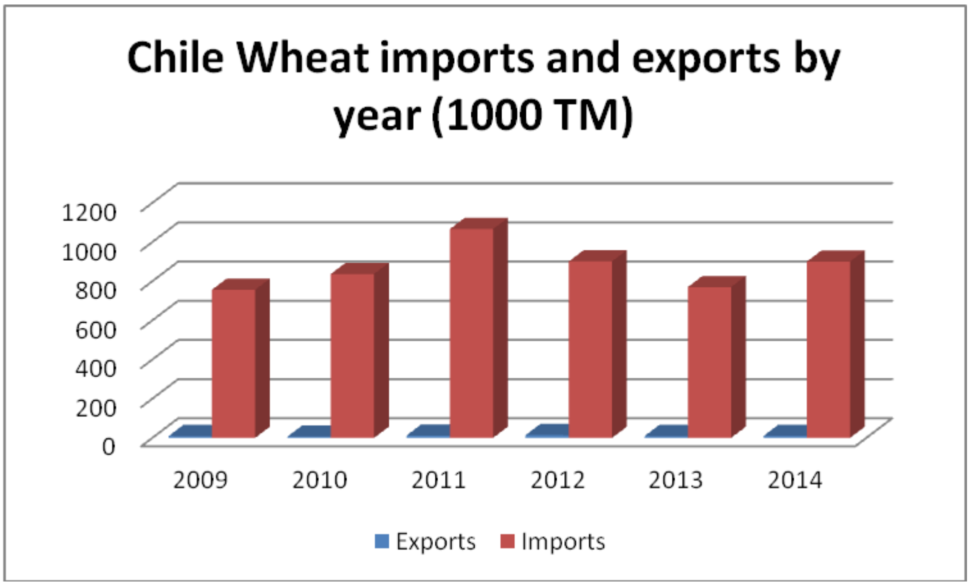


**Figure 3: Source: United States Department of Agriculture**

### 8.1.4 Grapes

**Table 4: Chile fresh Grape production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 1 105 000 | 324 000 | 341 |
| 2010 | 1 215 000 | 361 400 | 336 |
| 2011 | 1 175 000 | 362 800 | 324 |
| 2012 | 1 195 000 | 339 200 | 352 |
| 2013 | 1 055 000 | 325 200 | 324 |
| Average | | | 336 |

**Source: United States Department of Agriculture**

Table 4 above shows that from 2009 to 2013, Chile has been self-sufficient in the production of fresh grape. Over this period the quantity of grape production exceeded that of consumption. Chile has also been able to export excess grapes as depicted in figure 4 below

Figure 4 below shows that from 2009 to 2013, Chile was a net exporter of grapes to the World.

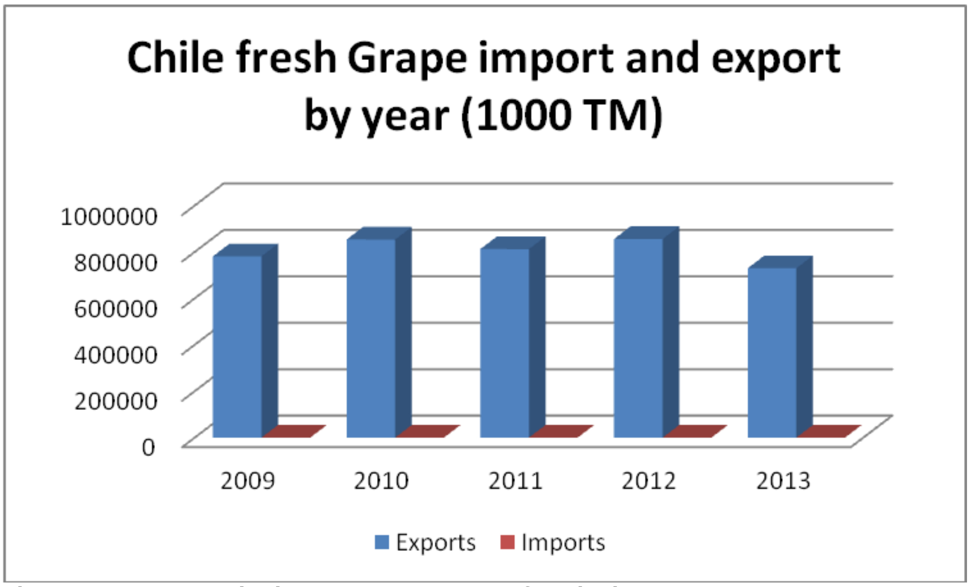


**Figure 4: Source: United States Department of Agriculture**

### 8.1.5 Corn (Maize)

**Table 5: Chile's Corn production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 1358 | 1900 | 71 |
| 2010 | 1438 | 2000 | 72 |
| 2011 | 1493 | 2300 | 65 |
| 2012 | 1519 | 2525 | 60 |
| 2013 | 1186 | 2625 | 45 |
| 2014 | 1400 | 2625 | 53 |
| Average | | | 61 |

**Source: United States Department of Agriculture**

Table 5 shows that for the past five years (2009-2014) there have been a corn deficit in Chile as corn consumption exceeded production. On average, Chile's corn production covered only 61% of its domestic corn consumption from 2009 to 2013. Indications are that, Chile depends on corn imports to sustain its consumption, see figure 5 below.

Figure 5 shows Chile's corn trade with the world over the past six years (2009-2014). For the period under discussion, Chile has been a net importer of corn from the world.

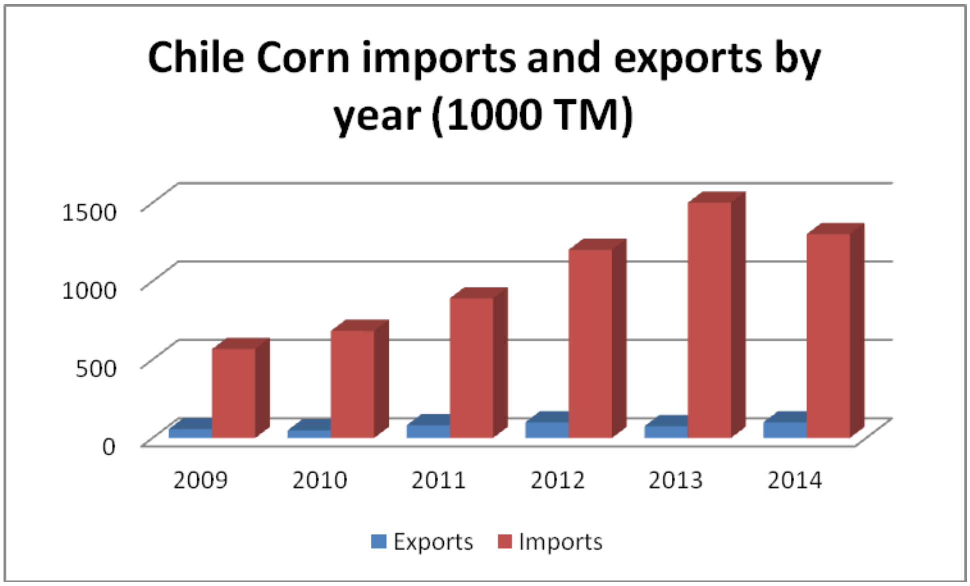


**Figure 5: Source: United States Department of Agriculture**

### 8.1.6 Apples

**Table 6: Chile's fresh apple production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 1 370 000 | 185 100 | 740 |
| 2010 | 1 431 000 | 197 800 | 724 |
| 2011 | 1 360 000 | 196 000 | 694 |
| 2012 | 1 420 000 | 196 000 | 724 |
| 2013 | 1 310 000 | 196 000 | 668 |
| Average | | | 710 |

**Source: United States Department of Agriculture**

Table 6 shows that, between 2009 and 2014 Chile's fresh apple production has been sevenfold the required consumption as weather conditions during winter months have been good in most growing areas. That made Chile a net exporter of fresh apples for the period under discussion, see figure 6 below.

Figure 6 shows that, over the past five years (2009-2013) Chile's exports of fresh apples to the World exceeded its imports from the World. Over the period in discussion, Chile has been recording a trade surplus with the world in terms of fresh apples.

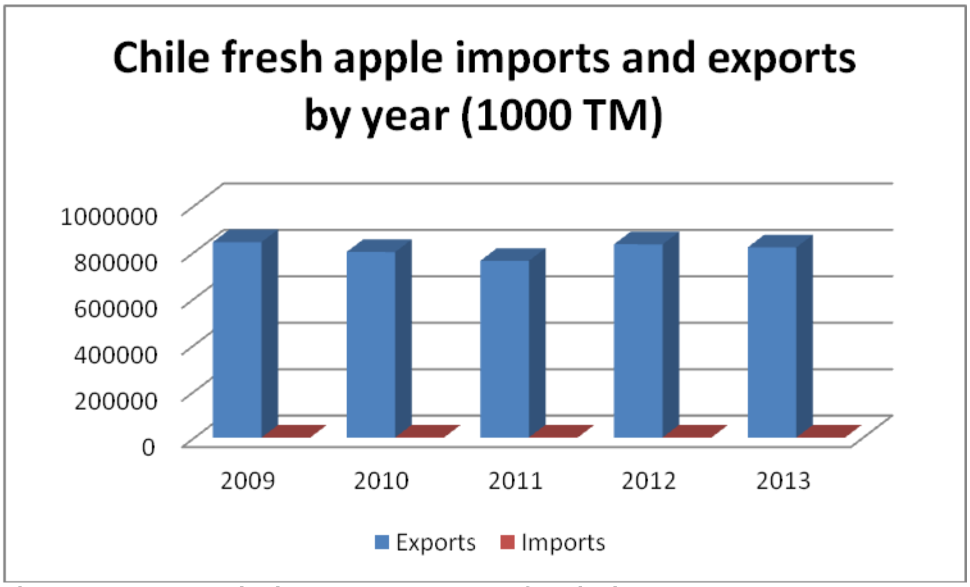


**Figure 6: Source: United States Department of Agriculture**

### 8.1.8 Pears

**Table 7: Chile's fresh pears production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 262 000 | 81 400 | 322 |
| 2010 | 290 000 | 81 800 | 355 |
| 2011 | 287 000 | 82 900 | 346 |
| 2012 | 289 000 | 81 400 | 355 |
| 2013 | 267 000 | 84 000 | 318 |
| Average | | | 339 |

**Source: United States Department of Agriculture**

Table 7 above shows that, on average for the past five years (2009-2013), Chile has produced pears threefold the required domestic consumption. Chile produces fresh pears and exports the excess as shown in figure 7 below.

Figure 7 below shows that Chile is a net exporter of fresh pears. From 2009 to 2013, the value of Chile's exports exceeded that of its imports.

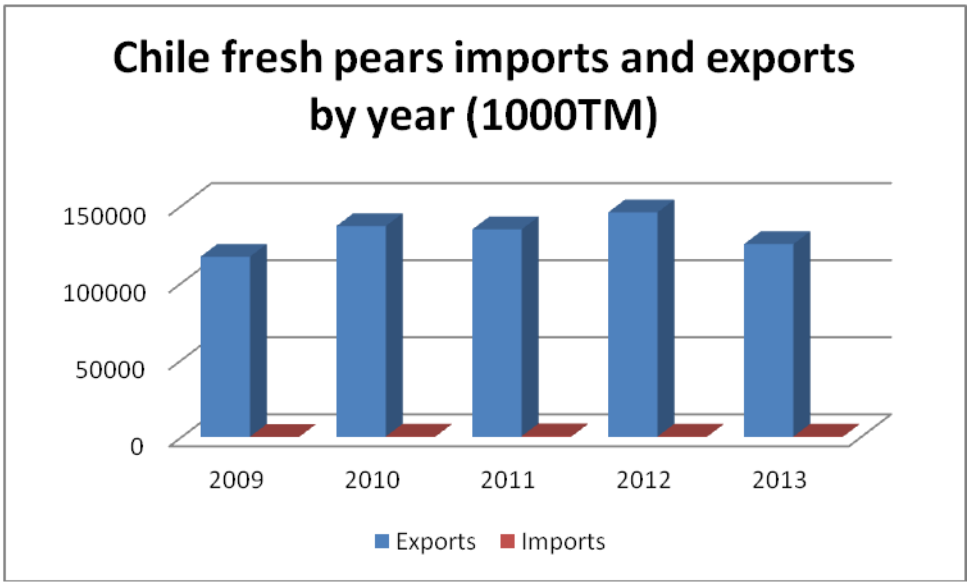


**Figure 7: Source: United States Department of Agriculture**

### 8.2 Fish and Fisheries products Production and Consumption

**Table 8: Chile's Fish meal production and consumption by Year (1000 MT)**

| Market Year | Production | Consumption | Self-Sufficiency |
|---|---|---|---|
| 2009 | 440 | 206 | 214 |
| 2010 | 500 | 234 | 214 |
| 2011 | 464 | 245 | 189 |
| 2012 | 432 | 260 | 166 |
| 2013 | 475 | 287 | 166 |
| 2014 | 500 | 305 | 164 |
| Average | | | 185 |

**Source: United States Department of Agriculture**

Table 8 above shows Chile's production and consumption of fish meal over a period of six years (2009-2014). On average during the period above, Chile's fish meal production was 85% above the required consumption; hence Chile recorded a trade surplus with the world on fisheries as shown in figure 8 below.

Figure 8 shows Chile's imports and exports of fish from 2009 to 2014. From 2009 to 2014 Chile has been a net exporter of fish to the world, the values of exports has been exceeding that of imports.

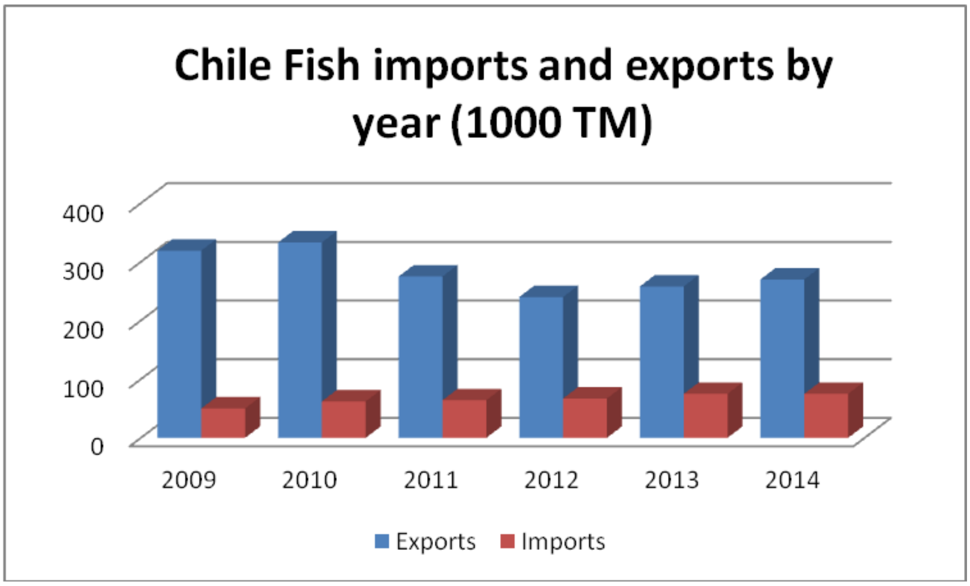


**Figure 8: Source: United States Department of Agriculture**

### 8.3 Forestry and Forestry Products Production and Consumption

**Table 9: Chile's Production of wood and paper products (Units: x1,000 Metric Ton)**

| | 2009 | 2010 | 2011 | 2012 | 2013 | Total |
|---|---|---|---|---|---|---|
| **Total** | **76 564** | **73 709** | **83 967** | **83 729** | **86 555** | **404 524** |
| **Roundwood** | **51 023** | **47 215** | **55 148** | **55 073** | **57 191** | **265 650** |
| Industrial round wood | 36 402 | 34 560 | 39 150 | 39 075 | 41 069 | 190 256 |
| Saw logs and veneer logs | 13 962 | 14 905 | 16 147 | 16 137 | 17 164 | 78 315 |
| Pulpwood (round and split) | 22 279 | 19 424 | 22 722 | 22 673 | 23 618 | 110 716 |
| Industrial round wood | 161 | 231 | 281 | 265 | 287 | 1 225 |
| Wood fuel | 14 621 | 12 655 | 15 998 | 15 998 | 16 122 | 75 394 |
| **Wood chips and particles** | **8 337** | **9 332** | **10 158** | **9 799** | **9 889** | **47 515** |
| **Wood residues** | **1 916** | **1 916** | **1 916** | **1 916** | **1 916** | **9 580** |
| **Wood charcoal** | **249** | **248** | **248** | **247** | **247** | **1 239** |
| **Sawn wood** | **5 836** | **6 354** | **6 785** | **7 160** | **7 721** | **33 856** |
| Sawn wood (coniferous) | 5 662 | 6 180 | 6 631 | 7 004 | 7 576 | 33 053 |
| Sawn wood (non-coniferous) | 174 | 174 | 154 | 156 | 145 | 803 |
| **Wood-based panels** | **2 373** | **2 691** | **2 890** | **2 618** | **2 677** | **13 249** |
| Veneer sheets | 64 | 44 | 50 | 71 | 53 | 282 |
| Plywood | 1 095 | 1 176 | 1 291 | 942 | 860 | 5 364 |
| Particle board | 382 | 515 | 545 | 599 | 766 | 2 807 |
| Fibreboard | 832 | 956 | 1,003 | 1,006 | 998 | 2 786 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Wood pulp** | **4 993** | **4 102** | **4 896** | **5 080** | **5 157** | **24 228** |
| Mechanical wood pulp | 503 | 458 | 485 | 448 | 364 | 2 258 |
| Semi-chemical wood pulp | 0 | 0 | 0 | 0 | 0 | 0 |
| Chemical wood pulp | 4 490 | 3 644 | 411 | 4 632 | 4 793 | 21 970 |
| Dissolving wood pulp | 0 | 0 | 0 | 0 | 0 | 0 |
| Other fibre pulp | 0 | 0 | 0 | 0 | 0 | 0 |
| **Recovered paper** | **489** | **489** | **489** | **489** | **489** | **2 445** |
| **Paper and paperboard** | **1 348** | **1 362** | **1 437** | **1 347** | **1 268** | **6 762** |
| Newsprint | 292 | 252 | 282 | 245 | 167 | 1 238 |
| Printing and writing paper | 69 | 56 | 67 | 16 | 6 | 214 |
| Other paper and paper board | 987 | 1 054 | 1 088 | 1 086 | 1 095 | 5 310 |

**Source: Food and Agriculture Organisation of the United State (FAO)**

Table 9 above shows Chile's production of wood and paper products from 2009 to 2013. Chile's major produced forestry product is round wood, wood chips and particles, and sawn wood, respectively.

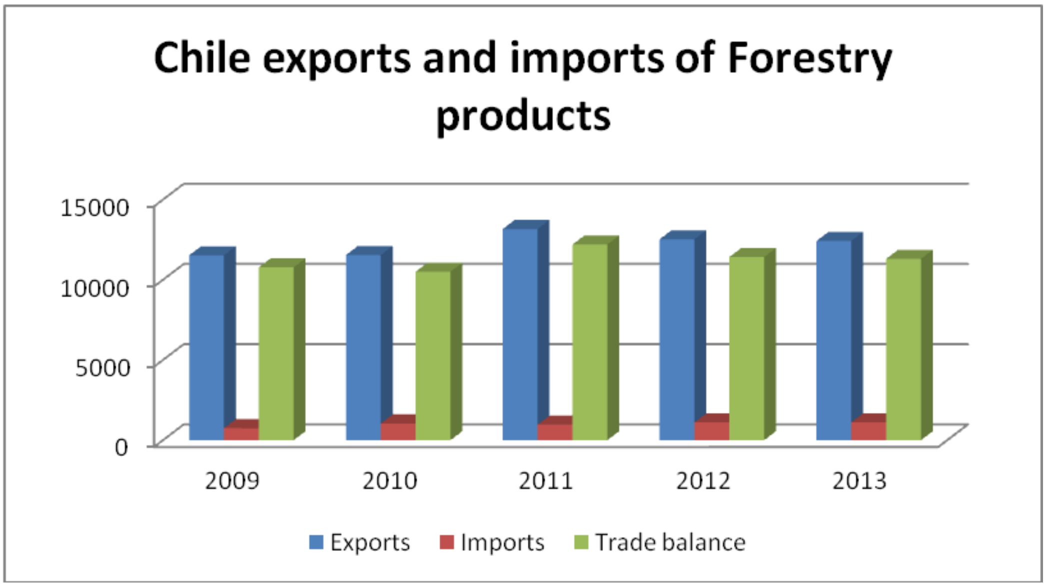


**Figure 9: Source: Food and Agriculture Organisation of the United State (FAO)**

Figure 9 above shows Chile's trade balance with the world with regards to forestry products between 2009 and 2013. Chile imports less than it exports in terms of forestry indicating that they are self-sufficient in forestry.

## 9. Major Agriculture, Forestry and Fisheries (AFF) Exports and Imports

### 9.1 Chile's major AFF exports.

**Table 12: Chile's top ten AFF export products to the world [2009-2014] R'000**

| HS code | Description | Average | % Share of Chile's total AFF exports | | Major Importers' -% share |
|---|---|---|---|---|---|
| | **Total top 10 AFF** | 8 143.9 | 41 | | |
| '080610 | Grapes, fresh | 1 431.4 | 7 | | USA (48),Netherlands (8), China (6), |
| '220421 | Grape wines not elsewhere specified (nes) | 1 390.6 | 7 | | USA (15), United Kingdom (14), Japan (6) |
| '470321 | Chemical wood pulp | 1 226.8 | 6 | | China (52), Italy (8), Korea Republic of (7) |
| '470329 | Chemical wood | 1 106.6 | 6 | | Netherlands (19), China (19), Korea (13) |
| '080810 | Apples, fresh | 701.3 | 4 | | USA (16), Colombia (9), Netherlands (8) |
| '440710 | Lumber, coniferous | 690.0 | 3 | | China (18), USA (16), Mexico (12) |
| '230120 | Flour, meal | 484.4 | 2 | | China (43), Japan (13), Korea (7) |
| '081040 | Cranberries | 397.8 | 2 | | USA (73), Netherlands (9), United Kingdom (8) |
| '030441 | Fillets of salmon | 361.1 | 2 | | USA (94), Brazil (2), Canada (1) |
| '020329 | Swine Cuts | 353.8 | 2 | | Japan (43), Korea, Republic (24), Russian Federation (9) |

**Source: ITC Trade Map**

Table 12 above presents Chile's top ten AFF export products to the world on averages over the period of six years (2009 to 2014), the percentage share of each product to the total AFF export products to the world, and the Chilean major export destinations. Figures in brackets in the far right column represent percentage shares of major importers for the product exported by Chile. For example, 48% of Chile's fresh Grapes exports to the world are going to the USA. On average between 2009 and 2014, Chile's AFF top ten exports to the World contributed 41% (i.e. R8.1million) to Chile's total AFF exports to the World. The leading average export products are fresh grapes and wine, both with a share of 7% of the total average AFF product exports. The top four destinations for Chile's AFF exports between 2009 and 2014 were the USA, China, Netherlands and the United Kingdom.

### 9.2 Chile's major AFF imports

**Table 13: Chile's AFF Import products from the world [2009-2014] R'000**

| HS code | Product Description | Average | % Share of Chile's total AFF imports | | Major Suppliers (%share) |
|---|---|---|---|---|---|
| | **Total top 10 AFF** | 2 382.05 | 36 | | |
| '020130 | Bovine cuts boneless | 723.85 | 11 | | Brazil (31), Paraguay (31), Argentina (21) |
| '151790 | preparation of animal | 262.83 | 4 | | Argentina (91), Uruguay (2), Malaysia (1) |
| '170199 | cane or beet sugar | 261.21 | 4 | | Colombia (40), Guatemala (35), Argentina (19) |
| '230990 | feed preparations | 242.79 | 4 | | Argentina (49), Brazil (14), USA (11) |
| '230400 | Soya-bean | 238.71 | 4 | | Paraguay (59), Argentina (26), Bolivia (14) |
| '100590 | Maize (corn) | 223.70 | 3 | | Paraguay (50), Argentina (44), Brazil (3) |
| '100199 | Wheat | 136.85 | 2 | | USA (48), Canada (27), Argentina (24) |
| '210690 | Food preparations | 109.59 | 2 | | USA (27), Argentina (13), Netherlands (7) |
| '220300 | Beer made from malt | 94.10 | 1 | | USA (48), Canada (27), Argentina (24) |
| '480411 | Paper, Kraft liner, in rolls | 88.42 | 1 | | USA (85), Brazil (4), Spain (4) |

**Source: ITC Trade Map**

Table 13 above shows that Chile's top ten AFF imports from the World contributed 36% (i.e. R2.3m) to the total Chile AFF imports from the World. Chile's AFF imports are more wide spread across different products. Boneless bovine cuts (11%), followed by preparation of meat, cane or beet sugar, animal feed preparations, all at 4%, were the leading Chile's AFF imports from the World. Figures in brackets represent percentage shares of major suppliers for the product imported by Chile. For example, from the total of Chile's bovine cuts boneless imports from the world, 31% was from Brazil.

Chile's major AFF suppliers were Brazil, Paraguay, Argentina, Malaysia, Uruguay, USA, Colombia, Guatemala, Bolivia, Canada, Spain and Mexico.

## 10. Trade & Tariff Policies

- **Tariffs**[16]

Chile's average MFN applied tariff rate for agricultural, forestry and fisheries products was 6% in 2014. Chile still applies a price band system based on international reference prices for imports of wheat, wheat flour and sugar.

Most AFF tariff lines, with the exclusion of some agricultural products like dairy products (average bound rate of 29%, oilseeds (average bound rate of 29%) and sugars and confectionery (average bound rate of 43%), were bound at 25% on average. Agricultural products bound at 31.5% comprise of 99 tariff lines on eight-digit basis (HS 2012). These include many dairy product, wheat and wheat flour, oilseeds, fruits, and vegetable fats and oils tariff lines. The rates applicable to cane or beet sugar in particular, is bound at 98%.

In general, all goods imported into Chile must pay import duty, except for the goods expressly declared exempt pursuant to a law[17].

- **Anti-dumping, Countervailing duty and Safeguards Measures**[18]

These are measures applied when the presence of imported goods causes or threatens to cause material injury to a domestic industry. Chile's anti-dumping and countervailing duty legislation is intended to be in harmony with the WTO Agreement. A number of legal amendments were introduced by Chile to further bring its anti-dumping and countervailing measures in line with the WTO requirements, by shortening the maximum period for an investigation from one year to nine months. Another important aspect is that measures may only last for one year and may not be renewed. The anti-dumping or countervailing duties may also not exceed the margin of the distortion.

[16] World Tariff Profiles, 2015
[17] Article 103 of the Customs Ordinance.
[18] WT/TPR/S/315: Chile,2015

Safeguard measures are a form of trade remedy introduced when an unforeseen surge in imports is threatening or causing serious injury to domestic producers. Changes were made to Chile's safeguards legislation, but they went in the opposite direction, extending the possible application and renewal periods from one to two years although these limits are still lower than those in the WTO Agreement on Safeguards. Some of the regional trade agreements (RTAs) signed by Chile exempt the parties from imposition of global safeguard measures adopted within the WTO framework, although in its most recent RTAs there are no such exceptions.

- **Technical regulations and standards**[19]

The legal framework for the drafting and application of technical regulations, standards and conformity assessment procedures is transparent and open. The measures are drafted on the basis of principles of non-discrimination and transparency, and for the most part, recourse to international standards.

- Chile's National Standardization Institute (INN) is responsible for drafting voluntary Chilean technical standards (NCh), following criteria internationally accepted by the International Standards Organisation (ISO) and the International Electro-technical Commission (IEC). The most noticeable degree of Chile's standardization is in the areas of construction, foodstuffs, health, safety, quality of life and risk prevention.

The regulatory agencies are required to publish on their websites all technical regulations and conformity assessment procedures in effect. Chile also has a Technical Regulations Gateway intended to centralize this information. Between January 2009 and December 2014, Chile submitted 209 new notifications of technical regulations to the WTO. As a general rule, for both imported and domestic products, compliance with technical regulations is verified after the products have been placed on the market. However, for the import of foodstuffs, beverages, medicines, weapons, radioactive substances, electrical goods and fuels, verification takes place at the border.

[19] WT/TPR/S/315: Chile,2015

- **Sanitary and Phytosanitary measures**[20]

The drafting and use of sanitary and phytosanitary (SPS) measures are the accountability of many authorities, like the Ministries of Agriculture, Health, the Economy, and Foreign Affairs. Drafts of SPS measures are developed by technical committees, which usually base such measures on the relevant international standards. SPS drafts are developed for public consultation and simultaneously notified to the WTO. During the period 2009-2014, Chile submitted 201 notifications to the WTO's SPS Committee.

- **Rules of origin**

Chile applies Rules of Origin on a MFN basis except for imports under preferential trade agreements concluded with other parties.

- Customs procedures and valuations

Chile’s National Customs Service (Customs) is responsible for customs administration and for verifying and determining the customs value of imported goods. The body also ensures that importers of ozone-depleting substances are registered.

The Customs services would verify and determine the customs value of imported goods using the valuation methods of the WTO Agreement on Customs Valuation. The onus is on the importer to provide the necessary documents and information for verifying that the value declared corresponds to the transaction value.
The government of Chile have published a table[21] that lists the goods, authority responsible and the law governing the procedures for goods requiring prior control (i.e. endorsement, certification or approval for final importation) before being cleared to enter Chile.,

[20] WT/TPR/S/315: Chile,2015
[21] Online information from the National Customs Service viewed at: http://www.aduana.cl/aduana/site/artic/20070220/pags/20070220163407.html#vtxt_cuerpo_T0; http://www.aduana.cl/importaciones-de-productos/aduana/2007-02-28/161116.html; and http://www.aduana.cl/aduana/site/edic/base/port/inf_fiscalizacion.html.

Transit, transhipment and redirection declarations are processed electronically since 2010 in some ports.

## 11. Agricultural Trade Structure & Product Analysis

This section provides an overview of South Africa's agriculture, forestry and fisheries trade with Chile. The aim is to investigate the opportunities for maximising trade between the two countries. There is no trade agreement between South Africa and Chile, trade takes place on an MFN basis. During 2014, Chile was ranked the 80th SA's agricultural, forestry and fisheries market destination; during the same period, Chile was the 56th SA supplier of agriculture, forestry and fisheries imports.

**Table 14: SA-Chile Agriculture, Forestry and Fisheries Trade Balance [2009-2014] R'000**

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | Average |
|---|---|---|---|---|---|---|---|
| **Exports** | 3 315.00 | 4 127.00 | 9 428.00 | 4 988.00 | 5 391.00 | 9 110.00 | **6 059.8** |
| **Imports** | 20 352.00 | 11 573.00 | 13 280.00 | 11 581.00 | 9 294.00 | 14 414.00 | **13 415.7** |
| **Balance** | -17 037.00 | -7 446.00 | -3 852.00 | -6 593.00 | -3 903.00 | -5 304.00 | **-7 355.8** |

**Source: Trade map, 2015**

Table 14 above shows the trade balance between South Africa and Chile over the past six years (from 2009 to 2014). The table shows that, between 2009 and 2014 SA agriculture, forestry and fisheries total value of exports to Chile has been consistently lower than that of its imports from Chile, i.e. SA experienced a trade deficit.

**Table 15: Top 10 SA Agriculture, Forestry and Fisheries exports to Chile [2009-2014] R'000**

| PRODUCTS | | | | | | SUPPLIERS | |
|---|---|---|---|---|---|---|---|
| HS code | Description | Average | MFN import tariff Rate | % Share of SA AFF exports to Chile | | SA % Share in world exports to Chile | % share of SA competitors in Chile |
| | **Total AFF** | 6 059.8 | | | | | |
| 200949 | Pineapple Juice, | 2 961.3 | 6 | 49 | | 57 | Thailand (22), Brazil (10), Costa Rica (5) |
| 440122 | Wood in chips | 670.5 | 6 | 10 | | 4 | Netherlands (28), Ireland (16), France (9) |
| 220870 | Liqueurs And Cordials | 620.0 | 6 | 9 | | 0 | France (49), USA (28), Spain (12) |
| 200870 | Peaches, Prepared | 430.2 | 6 | 8 | | 10 | China (54), USA (12), Greece (8) |
| 200799 | Jams, Fruit Jellies | 210.8 | 6 | 4 | | 10 | Argentina (33), China (10), Spain (7) |
| 480419 | Kraft liner | 136.8 | 6 | 2 | | 0.2 | USA (53), Germany (29), Sweden (13) |
| 490900 | Printed Post Cards | 101.5 | 6 | 2 | | 10 | Argentina (73), Iran (4), Peru (3) |
| 080620 | Grapes, dried | 98.7 | 6 | 1 | | 1 | USA (24), Brazil (13), Argentina (13) |
| 170490 | Sugar Confectionary | 88.0 | 6 | 1 | | 0 | China (34), USA (20), Spain (15) |
| 130219 | Vegetables Saps | 76.2 | 6 | 1 | | 0.2 | Argentina (33), Colombia (25), USA (8) |

**Source: ITC Trade Map: Market access Map 2015**

Table 15 above shows that on average South Africa' s top ten AFF exports to Chile over the six years (2009-2014) constituted 88% of total SA AFF exports to Chile. Chile's applied MFN import duty of 6 % on these top ten SA AFF products provides SA with an opportunity to expand trade. The major challenge for South Africa would be competition from economies like, Netherlands, Botswana, Russia, Angola, Germany, Brazil, Japan, India, China, Namibia, Algeria, Swaziland and Zimbabwe.

**Table 16: SA's Top 10 Agriculture, Forestry and Fisheries imports from Chile [2009-2014] R'000**

| PRODUCTS | | | | | | SUPPLIERS | |
|---|---|---|---|---|---|---|---|
| HS code | Description | Average | MFN Import tariff rate | % Share of SA AFF imports from Chile | | Chile %Share in SA's World imports | Chile's competitors in SA Market (%Share) |
| | **Total AFF** | 13 415.7 | | | | | |
| 100510 | Corn (Maize) Seed | 2 146.3 | 0 | 16 | | 12 | USA (41), Ukraine (18), Romania (18) |
| 120991 | Vegetable Seeds | 1 048.7 | 0 | 8 | | 4 | Netherlands (28),USA (19), France (14) |
| 440710 | Coniferous Wood Sawn | 1 124.3 | 0 | 8 | | 7 | Zimbabwe (21), New Zealand (18), Brazil (13) |
| 441600 | Casks, Barrels | 920.7 | 0 | 7 | | 4 | France (84), USA (8), Australia (2) |
| 190410 | Preparation s Food | 734.8 | 25 | 5 | | 6 | Germany (38), United kingdom (26), USA (11) |
| 190490 | Cereals (Not Corn) | 584.5 | 10 | 4 | | 6 | Thailand (45), Philippines (16), France (14) |
| 020727 | Turkey Cuts | 452.5 | 0 | 3 | | 1 | Brazil (60), Canada (14), USA (13) |
| 030322 | Atlantic And Salmon | 441.5 | 0 | 3 | | 36 | Norway (50), USA (07), Switzerland (04) |
| 130239 | Mucilage & Thickener | 403.5 | 4 | 3 | | 6 | Denmark (28), Spain (14), China (14) |
| 220421 | Grape wine | 320.7 | 0 | 2 | | 12 | China (79), New Zealand (06), Germany (01) |

**ITC Trade Map: Market access Map 2015**

Table 16 above shows that on average (2009-2014), SA's top ten AFF products imported from Chile, constituted 62% of SA's total average AFF imports from Chile. Corn (Maize), followed by Vegetable seeds, and coniferous wood, were the leading SA AFF imports from Chile with 16%, 8.5%, and 8% respectively.

## 12. Agricultural Markets Accessibility[22]

Chile in general has an open trade policy, and there is relatively limited use of trade distorting policies because of the use of a uniform MFN import tariff of 6 % (although preferential access as a consequence of FTAs results in an average effective import tariff of less than 2 %). This implies that the tariff does not seem to be the main factor prohibiting trade. Chile and SA are both southern hemisphere countries that produce similar products during the same seasons. Chile's major export destination is the USA (proximity and USA-Chile free trade agreement), whilst SA's major export destination is the EU (Free trade agreement) and SADC (Proximity and trade protocol). Fresh fruit and vegetable products are not prominent on the list of both SA and Chile's top ten AFF exports and imports from each other.

The agricultural products that Chile imports from the rest of the world in large quantities include maize, cane/beet sugar and wheat. Chile mostly imports these products from its neighbours, Argentina and Brazil, as they are leading exporters of these products in the World.

## 13. Trade Potential Analysis

**Table 17: Agricultural products with potential for exports to Chile according to the TPI**

| HS code | Description | Total TPI Score | Did Chile import from SA | Is the export by SA to Chile growing | Is SA exports to the world growing | Is Chile imports from the world growing | Is the average indicative potential trade larger than R1 million |
|---|---|---|---|---|---|---|---|
| '060110 | Bulbs, tubers, tuberous roots | 5 | 1 | 1 | 1 | 1 | 1 |
| '100510 | Maize (corn) seed | 5 | 1 | 1 | 1 | 1 | 1 |
| '120991 | Seeds, vegetable, not elsewhere specified for sowing | 5 | 1 | 1 | 1 | 1 | 1 |
| '200799 | Jams, fruit jellies, fruit/nut purée and paste, sugared, sweetened/not | 5 | 1 | 1 | 1 | 1 | 1 |
| '220870 | Liqueurs and cordials | 5 | 1 | 1 | 1 | 1 | 1 |

**Source: ITC Trade Map**

[22] OECD (2008). OECD review of agricultural policies: Chile. OECD: Paris.

Table 17 shows that SA has only five products with absolute trade potential in Chile with the maximum TPI score of five. These products are bulbs, maize seeds, vegetables seeds, jams and fruit jellies and liqueurs and cordials. However, there are seven other SA products that show a relatively acceptable potential in the Chilean market with a TPI score of 4.

## 14. Conclusion

The study shows that Chile is a politically stable country, with a user-friendly economy and trade policies making it conducive for foreign countries to trade in.

It could further be deduced from the study that, Chile is self-sufficient in the production of most of its major agriculture crops and products. The consumption and production analysis undertaken as indicated in paragraph 8 reveals that, Chile is a net exporter of poultry, fresh grapes, fish meal, fresh apples and fresh pears. Consequently, Chile is a net importer of wheat, beef, and corn, indicating that for these products, Chile depends on imports to sustain its domestic consumption.

The study reveals that there is a small percentage of trade in agricultural products between South Africa and Chile, since the two countries are direct competitors in a range of agricultural products.

It could further be assumed that trade between SA and Chile could be expanded through Chile's association with MERCOSUR, given that South Africa (as a member of SACU) has signed a PTA with MERCOSUR. Chiles's main trading partners are Brazil, Paraguay, Argentina, Malaysia, Uruguay, United States, Colombia, Guatemala, Bolivia, Canada, Spain, China, Mexico, Korea, and The United Kingdom.

A Trade Potential Index (TPI) reveals only five SA products with an absolute trade potential, and 7 with a relative trade potential in the Chilean market. Chile and South Africa are direct competitors, as they are both in the Southern Hemisphere (sharing similar seasons), and compete in the same markets with the same agricultural products.

## Annexure 1 - Trade Potential Index

The Trade Potential Index uses a scoring system based on data obtained from the Trade Map database. This allows the analysis to focus on trade potential whilst taking cognizance of import demand, import trends, growth rates and unit values rather than focusing solely on trade potential values. A score of either 1 or 0 is assigned to five of the trade indicators contained in the database. This score is then aggregated to give a total score, which is measured against a final score of 5. A score of 1 would therefore represent the lowest end of the scale and the least trade potential whilst a score of 5 would indicate the greatest trade potential.

The criterion for scoring is as follows:

• **The value of imports from a country:** If current trade in the form of imports from the partner country does exist, a score of 1 is allocated. The absence of trade is allocated a score of 0. The existence of a trade relationship is deemed a significant factor in furthering trade.

• **Growth in import demand:** If imports from the importing country have registered positive growth measured over the latest five year period, a score of 1 is allocated. No growth or negative growth rates are awarded a score of 0. In the absence of trade or import data between countries, import growth from the rest of the world is used as an indication of general import demand with positive growth allocated a score of 1 and no or negative growth a score of 0. The inclusion of this value in the table is also intended to indicate general import demand for the product as well as providing a basis for comparing demand for specific country products relative to demand for the same product from global sources.

• **Net Export growth:** Growth of net exports from the exporting country to the rest of the world is indicative of country's real supply capacity and increased demand for locally produced goods. A positive growth rate in the value of net exports over a five year period is awarded a score of 1, whilst no or negative growth is awarded a score of 0.

· **Production Capacity:** In assessing a country's potential for exporting a product, it is important to show a measure of confidence in terms of supply capacity and production growth. If production from the exporting country has registered a positive growth measured over the latest five years period, a score of 1 is allocated. No growth or negative growth rates over the same period are awarded a score of 0.

• **Unit Value**: Unit value is determined on the basis of value and quantity of exports. Products with a high unit value (>=1$) are allocated a score of 1. Products with a low unit value (<1$) are allocated a score of 0.

**Annexure II**

**Agricultural products with potential for exports to Chile according to the TPI**

| HS code | Description | Total TPI Score | Did Chile import from SA | Is the export by SA to Chile growing | Is SA exports to the world growing | Is Chile imports from the world growing | Is the avg. indicative potential trade larger than R1 million |
|---|---|---|---|---|---|---|---|
| '060110 | Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, dormant | 5 | 1 | 1 | 1 | 1 | 1 |
| '100510 | Maize (corn) seed | 5 | 1 | 1 | 1 | 1 | 1 |
| '120991 | Seeds, vegetable, not elsewhere specified (nes) for sowing | 5 | 1 | 1 | 1 | 1 | 1 |
| '200799 | Jams,fruit jellies,fruit/nut purée&paste,ckd prep,sugard,sweetend/not | 5 | 1 | 1 | 1 | 1 | 1 |
| '220870 | Liqueurs and cordials | 5 | 1 | 1 | 1 | 1 | 1 |
| '130219 | Vegetable saps and extracts nes | 4 | 1 | 0 | 1 | 1 | 1 |
| '210410 | Soups and broths and preparations thereof | 4 | 1 | 0 | 1 | 1 | 1 |
| '210690 | Food preparations nes | 4 | 1 | 0 | 1 | 1 | 1 |
| '220890 | Undenatured ethyl alc <80% alc content by volume & spirits, liqueur&spirit beverages nes | 4 | 1 | 0 | 1 | 1 | 1 |
| '481940 | Sacks and bags, of paper, nes; including cones | 4 | 1 | 1 | 0 | 1 | 1 |
| '491000 | Calendars of any kind, printed, including calendar blocks | 4 | 1 | 1 | 0 | 1 | 1 |
| '491110 | Trade advertising material, commercial catalogue and the like | 4 | 1 | 0 | 1 | 1 | 1 |
| '020230 | Bovine cuts boneless, frozen | 3 | 0 | 0 | 1 | 1 | 1 |
| '020322 | Hams, shoulders and cuts thereof, of swine, bone in, frozen | 3 | 0 | 0 | 1 | 1 | 1 |
| '020727 | Turkey, cuts & offal, frozen | 3 | 0 | 0 | 1 | 1 | 1 |
| '030429 | Frozen fish fillets (excl. swordfish and tooth fish) | 3 | 0 | 0 | 1 | 1 | 1 |
| '030481 | Frozen fillets, Pacific salmon, Atlantic and Danube | 3 | 0 | 0 | 1 | 1 | 1 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| '030499 | Frozen fish meat whether or not minced (excl. swordfish, tooth fish) | 3 | 0 | 0 | 1 | 1 | 1 |
| '040221 | Milk and cream powder unsweetened exceeding 1.5% fat | 3 | 0 | 0 | 1 | 1 | 1 |
| '040690 | Cheese nes | 3 | 0 | 0 | 1 | 1 | 1 |
| '050400 | Guts, bladders and stomachs of animals except fish whole or in pieces | 3 | 0 | 0 | 1 | 1 | 1 |
| '080440 | Avocados, fresh or dried | 3 | 0 | 0 | 1 | 1 | 1 |
| '080550 | Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus | 3 | 0 | 0 | 1 | 1 | 1 |
| '080620 | Grapes, dried | 3 | 1 | 1 | 1 | 0 | 0 |
| '080810 | Apples, fresh | 3 | 0 | 0 | 1 | 1 | 1 |
| '120999 | Seeds, fruit and spores for sowing, nes | 3 | 1 | 0 | 1 | 0 | 1 |
| '121220 | Seaweeds and other algae, fresh or dried whether or not ground | 3 | 0 | 0 | 1 | 1 | 1 |
| '150420 | Fish fats & oils and their fractions excluding liver, refind/not, not chemically modified | 3 | 0 | 0 | 1 | 1 | 1 |
| '160419 | Fish nes, prepared or preserved, whole or in pieces, but not minced | 3 | 0 | 0 | 1 | 1 | 1 |
| '180610 | Cocoa powder, containing added sugar or other sweetening matter | 3 | 0 | 0 | 1 | 1 | 1 |
| '190110 | Prep of cereals,flour,starch/milk for infant use, put up for retail sale | 3 | 0 | 0 | 1 | 1 | 1 |
| '190120 | Mixes & doughs for the prep of bakers' wares of heading No 19.05, nes | 3 | 0 | 0 | 1 | 1 | 1 |
| '190410 | Prep foods obtained by the swelling or roasting of cereal or cereal products | 3 | 0 | 0 | 1 | 1 | 1 |
| '190490 | Cereals, excluding maize (corn),in grain form, pre-cooked or otherwise prepared | 3 | 0 | 0 | 1 | 1 | 1 |
| '200290 | Tomatoes nes, prepared or preserved otherwise than by vinegar or acetic acid | 3 | 0 | 0 | 1 | 1 | 1 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| '200870 | Peaches nes,o/w prepared or preserved whether or not sugared,sweetened orspirited | 3 | 1 | 0 | 0 | 1 | 1 |
| '200911 | Orange juice, unfermentd&not spirited ,whether not sugared sweet,frozen | 3 | 0 | 0 | 1 | 1 | 1 |
| '200919 | Orange juice&nes,unfermented not spirited,whether or not sugared or sweet | 3 | 1 | 0 | 1 | 1 | 0 |
| '200939 | Single citrus fruit juice, unfermented, Brix value > 20 at 20°C, | 3 | 1 | 0 | 0 | 1 | 1 |
| '200949 | Pineapple juice, unfermented, Brix value > 20 at 20°C, whether or not | 3 | 1 | 1 | 0 | 0 | 1 |
| '220290 | Non-alcoholic beverages nes, excluding fruit/veg juices of heading No 20.09 | 3 | 0 | 0 | 1 | 1 | 1 |
| '441299 | Panels, 1 outer ply coniferous wood nes | 3 | 0 | 0 | 1 | 1 | 1 |
| '442010 | Statuettes and other ornaments of wood | 3 | 1 | 0 | 1 | 0 | 1 |
| '481390 | Paper, cigarette, nes | 3 | 0 | 0 | 1 | 1 | 1 |
| '481850 | Articles of apparel and clothing accessories, of paper, nes | 3 | 0 | 0 | 1 | 1 | 1 |
| '481920 | Cartons, boxes and cases, folding, of non-corrugated paper or paperboard | 3 | 1 | 0 | 0 | 1 | 1 |
| '482190 | Paper labels of all kinds, not printed | 3 | 0 | 0 | 1 | 1 | 1 |
| '490199 | Books, brochures, leaflets and similar printed matter, nes | 3 | 1 | 0 | 0 | 1 | 1 |
| '491191 | Pictures, designs and photographs | 3 | 1 | 0 | 1 | 1 | 0 |
| '491199 | Printed matter, nes | 3 | 1 | 0 | 0 | 1 | 1 |
| '170290 | Sugar nes, including invert sugar | 3 | 0 | 0 | 1 | 1 | 1 |
| '010619 | Live mammals (excl. primates, whales, dolphins and purpoises "mammals | 2 | 0 | 0 | 1 | 1 | 0 |
| '020714 | Fowls (gallus domesticus), cuts & offal, frozen | 2 | 0 | 0 | 0 | 1 | 1 |
| '030379 | Fish nes, frozen, excluding heading No 03.04, livers and | 2 | 0 | 0 | 1 | 1 | 0 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | roes | | | | | | |
| '030474 | Frozen fillets, Hake | 2 | 0 | 0 | 1 | 1 | 0 |
| '030541 | Salmon, Pacific, Atlantic and Danube, smoked including fillets | 2 | 0 | 0 | 1 | 1 | 0 |
| '030543 | Smoked trout, incl. fillets (excl. offal) | 2 | 0 | 0 | 1 | 1 | 0 |
| '030549 | Fish nes, smoked including fillets | 2 | 0 | 0 | 1 | 1 | 0 |
| '070310 | Onions and shallots, fresh or chilled | 2 | 0 | 0 | 1 | 1 | 0 |
| '071080 | Vegetables, frozen nes | 2 | 0 | 0 | 0 | 1 | 1 |
| '080212 | Almonds, fresh or dried, shelled or peeled | 2 | 0 | 0 | 1 | 1 | 0 |
| '080231 | Walnuts in shell, fresh or dried | 2 | 0 | 0 | 1 | 1 | 0 |
| '080232 | Walnuts, fresh or dried, shelled or peeled | 2 | 0 | 0 | 1 | 1 | 0 |
| '080510 | Oranges, fresh or dried | 2 | 0 | 0 | 0 | 1 | 1 |
| '080520 | Mandarins(tang&sats)clementines&wilkgs &sim citrus hybrids,fresh/dried | 2 | 0 | 0 | 1 | 1 | 0 |
| '080610 | Grapes, fresh | 2 | 0 | 0 | 1 | 1 | 0 |
| '080820 | Pears and quinces, fresh | 2 | 0 | 0 | 1 | 1 | 0 |
| '081110 | Strawberries, uncookd or steamed or boiled in water,sweetened or not,frozen | 2 | 0 | 0 | 1 | 1 | 0 |
| '081190 | Fruits&edible nuts uncook,steam/boil (water) sweetened/not,frozen,nes | 2 | 0 | 0 | 0 | 1 | 1 |
| '091099 | Spices nes | 2 | 0 | 0 | 1 | 1 | 0 |
| '110710 | Malt, not roasted | 2 | 0 | 0 | 0 | 1 | 1 |
| '120930 | Seeds, flower, for sowing | 2 | 0 | 0 | 1 | 1 | 0 |
| '121190 | Plants &pts of plants(incl sed&fruit) usd in pharm,perf,insect etc nes | 2 | 0 | 0 | 0 | 1 | 1 |
| '121299 | Vegetable products nes used primarily for human consumption | 2 | 0 | 0 | 1 | 1 | 0 |
| '130239 | Mucilages&thickeners nes,modifid or not,derivd from vegetable products | 2 | 0 | 0 | 1 | 1 | 0 |
| '150910 | Olive oil, virgin | 2 | 0 | 0 | 1 | 0 | 1 |
| '151590 | Veg fats&oils nes&their fractions,refind or not but not chemically mod | 2 | 0 | 0 | 1 | 0 | 1 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| '160590 | Molluscs and other aquatic invertebrates prepared or preserved | 2 | 0 | 0 | 1 | 1 | 0 |
| '170199 | Refined cane or beet sugar, solid, without flavouring or colouring matter | 2 | 0 | 0 | 1 | 0 | 1 |
| '170490 | Sugar confectionery nes (including white chocolate),not containing cocoa | 2 | 0 | 0 | 0 | 1 | 1 |
| '200980 | Fruit&veg juice nes (exc mx) unfermented unspirited,whether/not sug/sweet | 2 | 1 | 1 | 0 | 1 | 1 |
| '210120 | Tea or maté extracts,essences & concentrates & preparations thereof | 2 | 0 | 0 | 0 | 1 | 1 |
| '220210 | Waters including mineral & aerated, containg sugar or sweetening matter or flavoured | 2 | 0 | 0 | 1 | 1 | 0 |
| '220410 | Grape wines, sparkling | 2 | 0 | 0 | 0 | 1 | 1 |
| '220421 | Grape wines nes, inclding fort&grape must,unfermented by adding alc in ctnr<=2l | 2 | 0 | 0 | 0 | 1 | 1 |
| '220429 | Grape wines nes,incl fort&grape must,unfermntd by add alc,in ctnr > 2l | 2 | 0 | 0 | 1 | 1 | 0 |
| '230120 | Flour,meal&pellet of fish,crust,mol/oth aqua invert,unfit human cons | 2 | 0 | 0 | 0 | 1 | 1 |
| '230990 | Animal feed preparations nes | 2 | 0 | 0 | 1 | 0 | 1 |
| '240220 | Cigarettes containing tobacco | 2 | 0 | 0 | 0 | 1 | 1 |
| '440710 | Lumber, coniferous (softwood) 6 mm and thicker | 2 | 0 | 0 | 1 | 0 | 1 |
| '441011 | Wafer board, including oriented strand board of wood | 2 | 0 | 0 | 1 | 0 | 1 |
| '441114 | Medium density fibreboard MDF of wood, of a thickness > 9 mm | 2 | 0 | 0 | 0 | 1 | 1 |
| '441192 | Fibreboard of wood or other ligneous materials, whether or not agglome | 2 | 0 | 0 | 0 | 1 | 1 |

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|---|---|---|---|---|---|---|---|
| '441239 | Plywood consisting solely of sheets of wood <= 6 mm thick | 2 | 0 | 0 | 0 | 1 | 1 |
| '480100 | Newsprint, in rolls or sheets | 2 | 0 | 0 | 0 | 1 | 1 |
| '480419 | Paper, Kraft liner, in rolls, o/t unbleached, uncoated | 2 | 1 | 0 | 0 | 1 | 0 |
| '480519 | Fluting paper, uncoated, in rolls of a width > 36 cm or in square or r | 2 | 0 | 0 | 1 | 0 | 1 |
| '481490 | Wallpaper and similar wall coverings, nes | 2 | 0 | 0 | 1 | 1 | 0 |
| '481910 | Cartons, boxes and cases, of corrugated paper or paperboard | 2 | 1 | 0 | 0 | 0 | 1 |
| '481930 | Sacks and bags, of paper, having a base of a width of 40 cm or more | 2 | 0 | 0 | 0 | 1 | 1 |
| '490290 | Newspapers, journals and periodicals, nes | 2 | 1 | 0 | 0 | 0 | 1 |
| '020442 | Sheep cuts, bone in, frozen | 1 | 0 | 0 | 1 | 0 | 0 |
| '020649 | Swine edible offal, frozen nes | 1 | 0 | 0 | 1 | 0 | 0 |
| '021099 | Meat and edible offal, salted, in brine, dried or smoked, and edible f | 1 | 0 | 0 | 1 | 0 | 0 |
| '030212 | Salmon Pacific,Atlantic&Danube, No 03.04,livers&roes | 1 | 0 | 0 | 1 | 0 | 0 |
| '030319 | Frozen Pacific salmon "Oncorhynchus gorbuscha, Oncorhynchus keta, Onco | 1 | 0 | 0 | 0 | 1 | 0 |
| '030322 | Salmon Atlantic,frozen,excluding heading No 03.04, livers and roes | 1 | 0 | 0 | 1 | 0 | 0 |
| '030378 | Hake, frozen, excluding heading No 03.04, livers and roes | 1 | 0 | 0 | 1 | 0 | 0 |
| '030419 | Fresh or chilled fillets and other fish meat whether or not minced (ex | 1 | 0 | 0 | 1 | 0 | 0 |
| '030614 | Crabs frozen, in shell or not, including boiled in shell | 1 | 0 | 0 | 0 | 1 | 0 |
| '030799 | Molluscs nes,shelled o not&aquatic invert nes,fz,drid,salted o in brine | 1 | 0 | 0 | 1 | 0 | 0 |
| '040299 | Milk and cream nes sweetened | 1 | 0 | 0 | 0 | 1 | 0 |
| '040900 | Honey, natural | 1 | 0 | 0 | 1 | 0 | 0 |

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|---|---|---|---|---|---|---|---|
| '060120 | Bulbs,tubers,corms etc in growth or in flower & chicory plants & roots | 1 | 0 | 0 | 0 | 1 | 0 |
| '070320 | Garlic, fresh or chilled | 1 | 0 | 0 | 0 | 0 | 1 |
| '080920 | Cherries, fresh | 1 | 0 | 0 | 1 | 0 | 0 |
| '080930 | Peaches, including nectarines, fresh | 1 | 0 | 0 | 1 | 0 | 0 |
| '080940 | Plums and sloes, fresh | 1 | 0 | 0 | 1 | 0 | 0 |
| '081040 | Cranberries, bilberries and other fruits of the genus Vaccinium, fresh | 1 | 0 | 0 | 1 | 0 | 0 |
| '081050 | Kiwifruit, fresh | 1 | 0 | 0 | 1 | 0 | 0 |
| '081120 | Raspberries,mulberries,etc uncook,steam/boil in water sweetend/not, frozen | 1 | 0 | 0 | 0 | 1 | 0 |
| '081320 | Prunes, dried | 1 | 0 | 0 | 0 | 1 | 0 |
| '081330 | Apples, dried | 1 | 0 | 0 | 1 | 0 | 0 |
| '130231 | Agar-agar | 1 | 0 | 0 | 0 | 1 | 0 |
| '140120 | Rattans used primarily for plaiting | 1 | 0 | 0 | 0 | 1 | 0 |
| '140490 | Vegetable products nes | 1 | 0 | 0 | 0 | 1 | 0 |
| '200791 | Citrus fruit (marmalades, purée, etc) prep whether/not sweetend | 1 | 0 | 0 | 0 | 1 | 0 |
| '200850 | Apricots nes, prep or presvd whether or not sugard,sweetend o spirited | 1 | 0 | 0 | 0 | 1 | 0 |
| '200929 | Grapefruit juice, unfermented, Brix value > 20 at 20°C, whether or not | 1 | 1 | 0 | 0 | 0 | 0 |
| '200969 | Grape juice, incl. grape must, unfermented, Brix value > 30 at 20°C, w | 1 | 0 | 0 | 0 | 0 | 1 |
| '200979 | Apple juice, unfermented, Brix value > 20 at 20°C | 1 | 0 | 0 | 0 | 1 | 0 |
| '440122 | Wood in chips, non-coniferous | 1 | 0 | 0 | 0 | 0 | 1 |
| '441193 | Fibreboard of wood or other ligneous materials | 1 | 0 | 0 | 1 | 0 | 0 |
| '441820 | Doors and their frames and thresholds, of wood | 1 | 0 | 0 | 0 | 1 | 0 |
| '481099 | Paper, in rolls or sheets, clay coated, nes | 1 | 0 | 0 | 0 | 1 | 0 |
| '482320 | Paper, filter, cut to size or shape | 1 | 0 | 0 | 0 | 1 | 0 |
| '482390 | Paper and paper articles, nes | 1 | 0 | 0 | 0 | 1 | 0 |

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|---|---|---|---|---|---|---|---|
| '490599 | Maps and hydro graphic/similar charts of all kinds,printed,not in book-form | 1 | 1 | 0 | 0 | 0 | 0 |

**Source: ITC Trade Map**

Preserved=Pres ***
Not elsewhere specified =Nes *
Prepared=Prep**