



8⁰⁰ CIRUELAS
X⁰⁰ SECAS **ONLINE**

A product in a good standing
(Un producto en buen pie)



Industria de la ciruela seca: ¿En qué ciclo estamos?

Sebastián Valdés Lutz

Director de Frutexsa | Director de Piwén

Industria de la ciruela seca:
¿En qué ciclo estamos?



Contexto:

La industria mundial de ciruela seca está viviendo la mayor contracción de oferta desde el **2004**

Origen	cosecha en toneladas métricas				
	2017	2018	2019	2020	2021
California	95.255	79.832	81.819	45.359	70.000
Chile	99.538	90.757	80.488	76.088	44.000
Francia	48.282	34.000	42.462	33.000	35.000
Argentina	13.037	50.364	16.567	21.488	15.000
Subtotal Big 4	256.112	254.954	221.336	175.935	164.000
Australia	4.500	1.100	3.028	2.000	1.500
Italia	890	1.350	1.830	1.200	1.200
Serbia	3.000	8.000	5.000	4.000	4.000
Sudáfrica	1.100	1.005	800	600	500
Total	265.602	266.409	231.994	183.735	171.200



1er CICLO

hasta

1930

LA EXPLOSIÓN
DE CALIFORNIA



Los colonos que llegaron a California buscando oro terminaron como agricultores ...
... algunos de ciruela seca

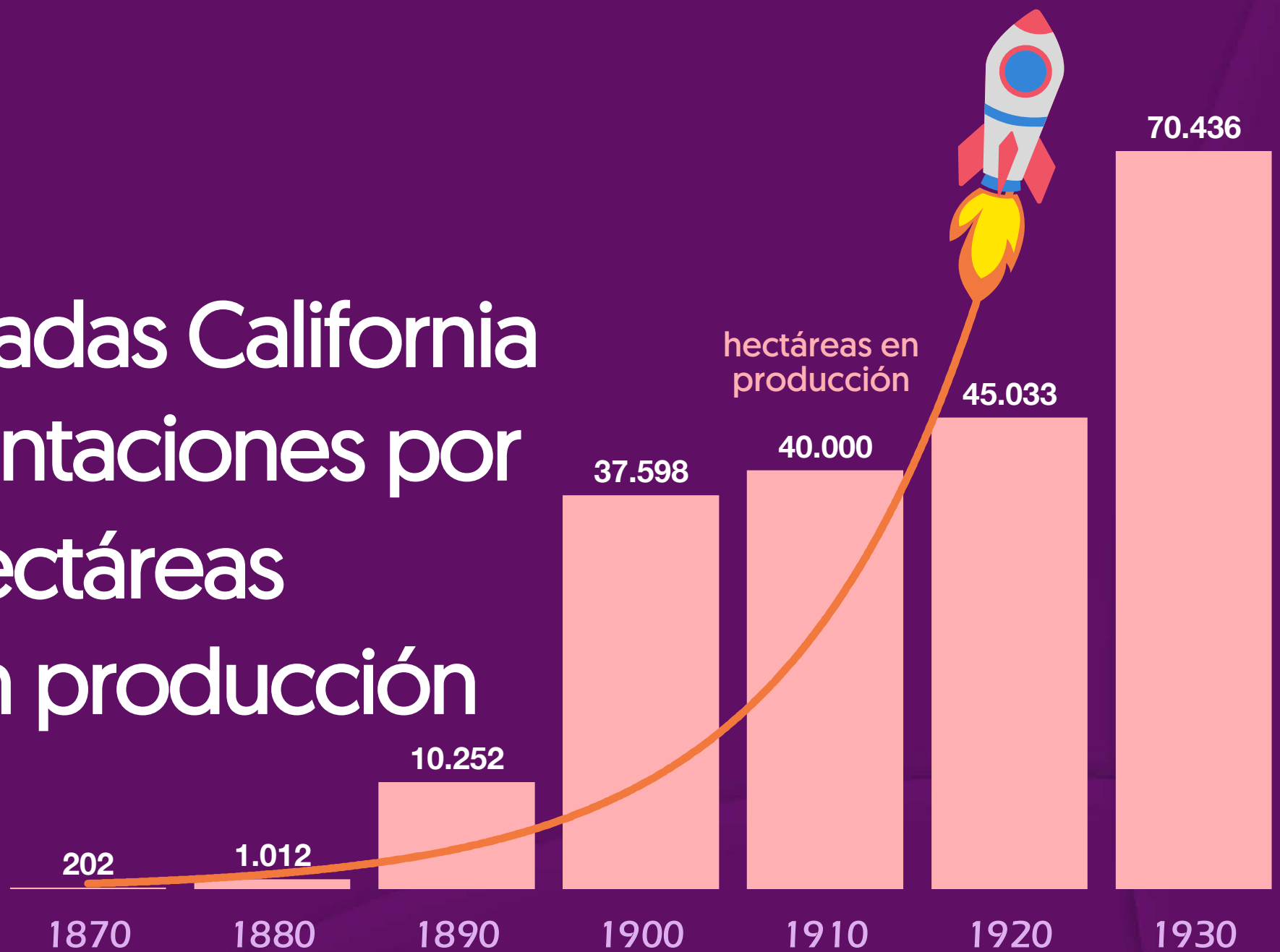


Sonoma Napa

Santa Cruz Santa Clara

**La ciruela seca europea
se introdujo y creció
inicialmente en los
valles costeros
de California**

En 6 décadas California
sumó plantaciones por
78 mil hectáreas
70 mil en producción



En 1930

California alcanzó una
producción cercana a las
250 mil toneladas métricas



Grandes números de California en 1930



17.553 operaciones agrícolas

248.569

Toneladas de producción

14,2 toneladas
| operación



70.436

Hectáreas en producción

4,0 hás. | operación

6.106

Hectáreas en desarrollo

0,3 hás. | operación

76.542

Hectáreas totales

4,4 hás. | operación

3,5 toneladas
| há. en producción



13.686.641

Árboles en producción

194 árboles | há.

1.767.415

Árboles en desarrollo

289 árboles | há.

15.454.056

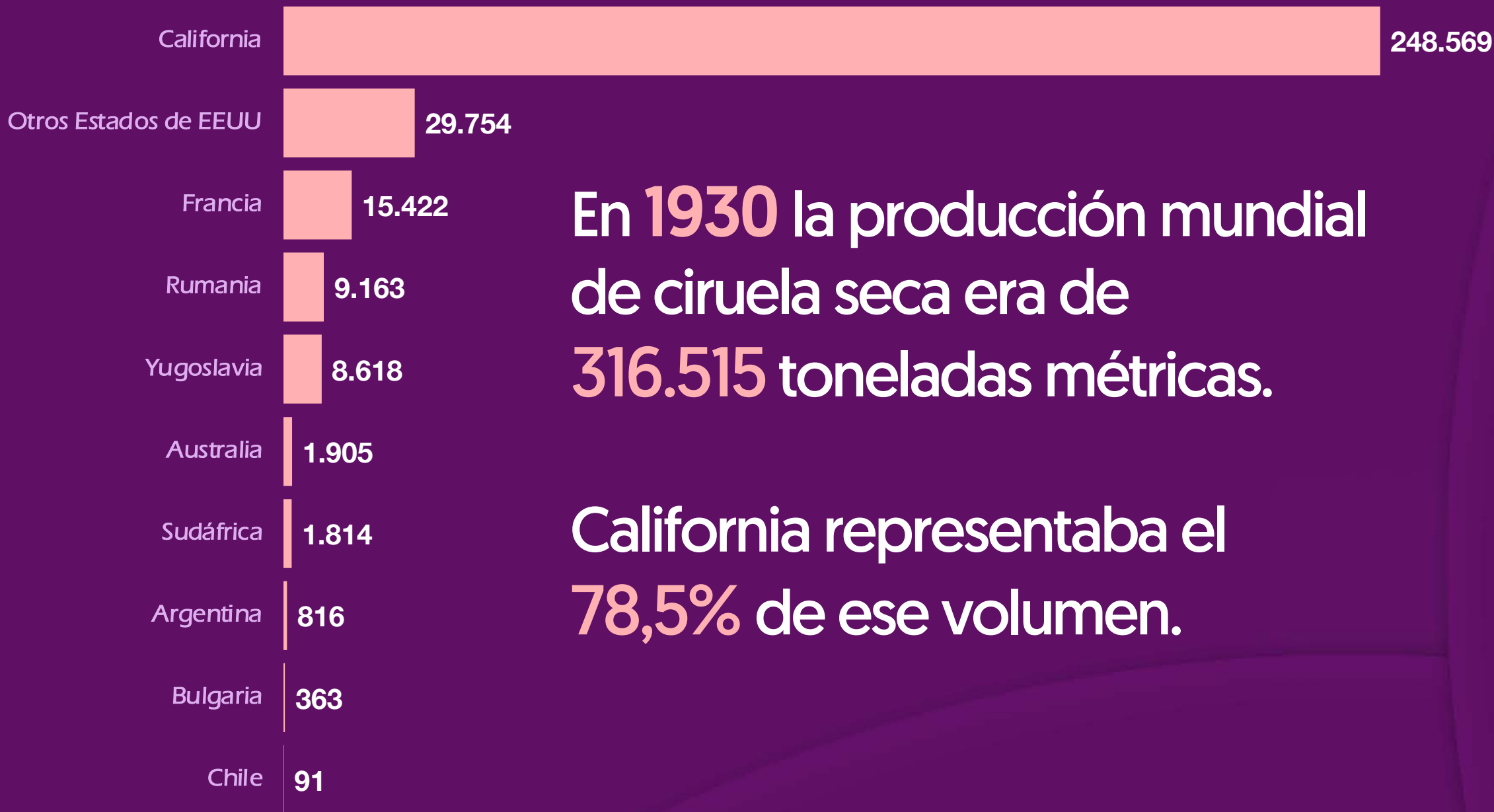
Árboles totales

202 árboles | há.

18 Kg.
| árbol en producción



En **1930**
el valor de la
producción de ciruela
seca de California era
de **US\$ 285 millones**
de hoy



En **1930** la producción mundial de ciruela seca era de **316.515** toneladas métricas.

California representaba el **78,5%** de ese volumen.

1921

¿Cómo se promocionó el consumo de ciruela seca?

Atributos de salud:

Contiene más azúcar natural digerible que cualquier otra fruta, y es rica en hierro tónico.

Atributos de sabor:

Rica, naturalmente dulce.

154 HOME JOURNAL April, 1920



HEALTH for you ~ from the lap of **NATURE**

NATURE has been generous indeed with SUNSWEET Prunes. She has made them a fruit-food beyond compare—a health-food essential to your daily fare. For they contain more *digestible* natural fruit sugar than any other fruit. They are rich in tonic iron. And not only are they tasteful and nutritious, but they help to balance the *entire* diet.

Says an acknowledged authority on nutrition: "In using dried fruit [such as SUNSWEET Prunes] we obtain not only the nutritive value of the fruit sugar, but whatever other hygienic or medicinal value they may have by virtue of the salts and organic acids found in them. The craving for sweets, exhibited in most children and many adults, is a natural demand on the part of the system for a needed food."

That's why we say: eat SUNSWEET Prunes *every day*—not only because they are the finest prunes California can produce—but for the healthful good that's in them! Ask your grocer for these top-quality prunes in the 3 lb. sanitary carton; and, if he is not yet supplied, see that the prunes he *does* sell you are taken from the 25 lb. box of SUNSWEET Prunes carried by grocers everywhere.

Also—send for our Recipe Packet which shows many new and delicious ways to serve this fine fruit-food. Each recipe has been tested from the standpoint of the housewife—each is sure to work out. The recipes are printed on *gummed slips* (5x3") so they can be pasted in your cook book or on recipe filing cards. This Recipe Packet is free—send for it today!

CALIFORNIA PRUNE AND APRICOT GROWERS INC.
114 Market Street, San Jose, California
A cooperative growing, packing and marketing association embracing more than 7,500 growers engaged in this industry in California

SUNSWEET
California's Nature-Flavored
PRUNES

**Best Way
To Cook Breakfast
Prunes**

First, soak them over night or for several hours at least. Second, cook slowly until tender in the water in which they were soaked. Third, use plenty of water so the fruit will be "loose." Fourth, do not cook them too long as they will become too soft. Flavor with cinnamon, sliced lemon, or orange juice. Sugar to taste.



**How 60,000 Doctors
Start their Breakfasts**

THIS is of real importance to your children and your men.

An investigation shows that more than 60,000 doctors—more than half of the entire medical profession—begin their breakfasts with delicious prunes.

The main reasons stated in the replies to this investigation are,—“I like them,”—“They are delicious food,”—“I like their flavor,”—“Nothing better when well cooked,”—“The most delicious of all fruits,” etc.

Then follows, “Prunes are good for anyone,”—“Nothing is more nourishing for breakfast,”—“A fine energy-food,”—“They keep the system in the best condition,” and scores of other comments, far too numerous to mention.

But all agree on two points—the luscious flavor and the general healthfulness of prunes. These doctors know the value of the fruit-salts and the pulp, the energizing nutrient, the fortifying iron content and the growth-producing vitamins of prunes.

All say that they prescribe them. What greater tribute could a food receive?

This luscious dish, in fact, should be the breakfast-habit in your home for these physicians' reasons.

When cooked as we've suggested elsewhere on this page, there is no food that better suits the most discriminating palate.

You'll find prunes like them served as a specialty at all the finest hotels and best restaurants, and in several million homes, so men can get them almost anywhere.

And you'll find that prunes are economical, one of the least expensive of all foods.

If not in your home daily you are missing a rare treat.

Men and children are delighted with such tasty food, so it is very easy to give them the benefits they need in luscious prunes.

Begin today to so improve your meals and the whole family's health. Serve them daily for ten days to prove these good results.

From Tender, Juicy Plums

Ask for Sunsweet—selected, graded prunes. These prunes were ripe, juicy plums while growing on the tree in California. But you get them from your dealer in the form of luscious prunes. Try these plum-flavored prunes.

Sold in fresh, clean 2-pound cartons; also in bulk from sanitary 25-pound boxes, at all stores.

Mail coupon for handy packet containing 45 selected prune recipes. Each recipe is printed on a separate sheet, just the right size to file in standard recipe card file box, or to paste in your recipe book. Clip the coupon so you won't forget.



*** SUNSWEET
Prunes**
Selected from Ripe, Juicy Plums

CALIFORNIA PRUNE & APRICOT GROWERS ASSOCIATION
11,252 Grower-Members
SAN JOSE CALIFORNIA

-----Mail This-----
CALIFORNIA PRUNE & APRICOT GROWERS ASS'N.
Dept. M-405, San Jose, California
Please send me without charge your handy packet of
45 Sunsweet Recipes each one printed on a separate
sheet.
Name.....
Street.....
City.....State.....
May 1924 Good Housekeeping

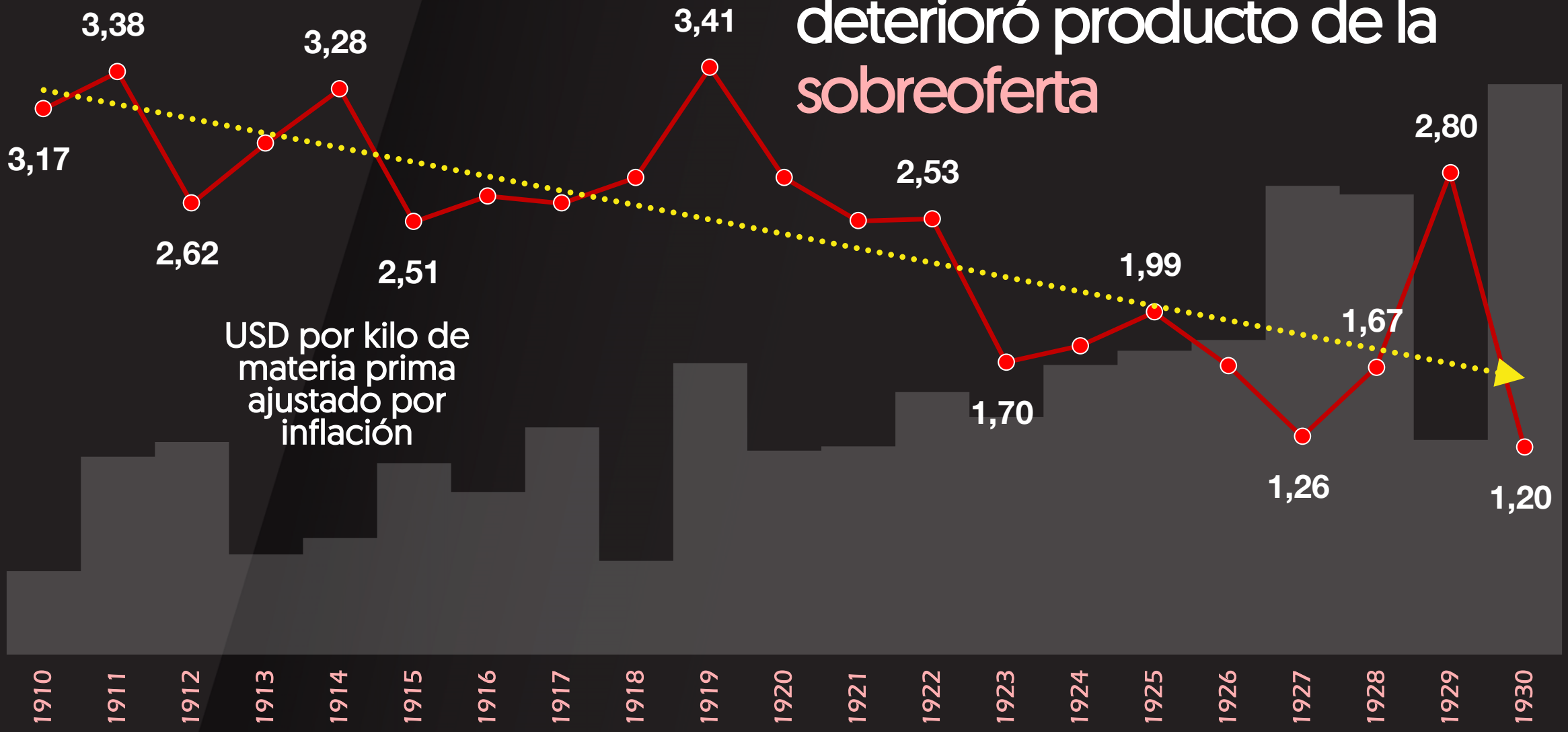
1924

¿Cómo se promocionó el consumo de ciruela seca?

Atributos de salud:
Alimento energético, con alto contenido de hierro y vitaminas.

Atributos de sabor:
Ciruela madura, tierna, jugosa.

Al año **1930** el retorno a productor en California se deterioró producto de la **sobreoferta**

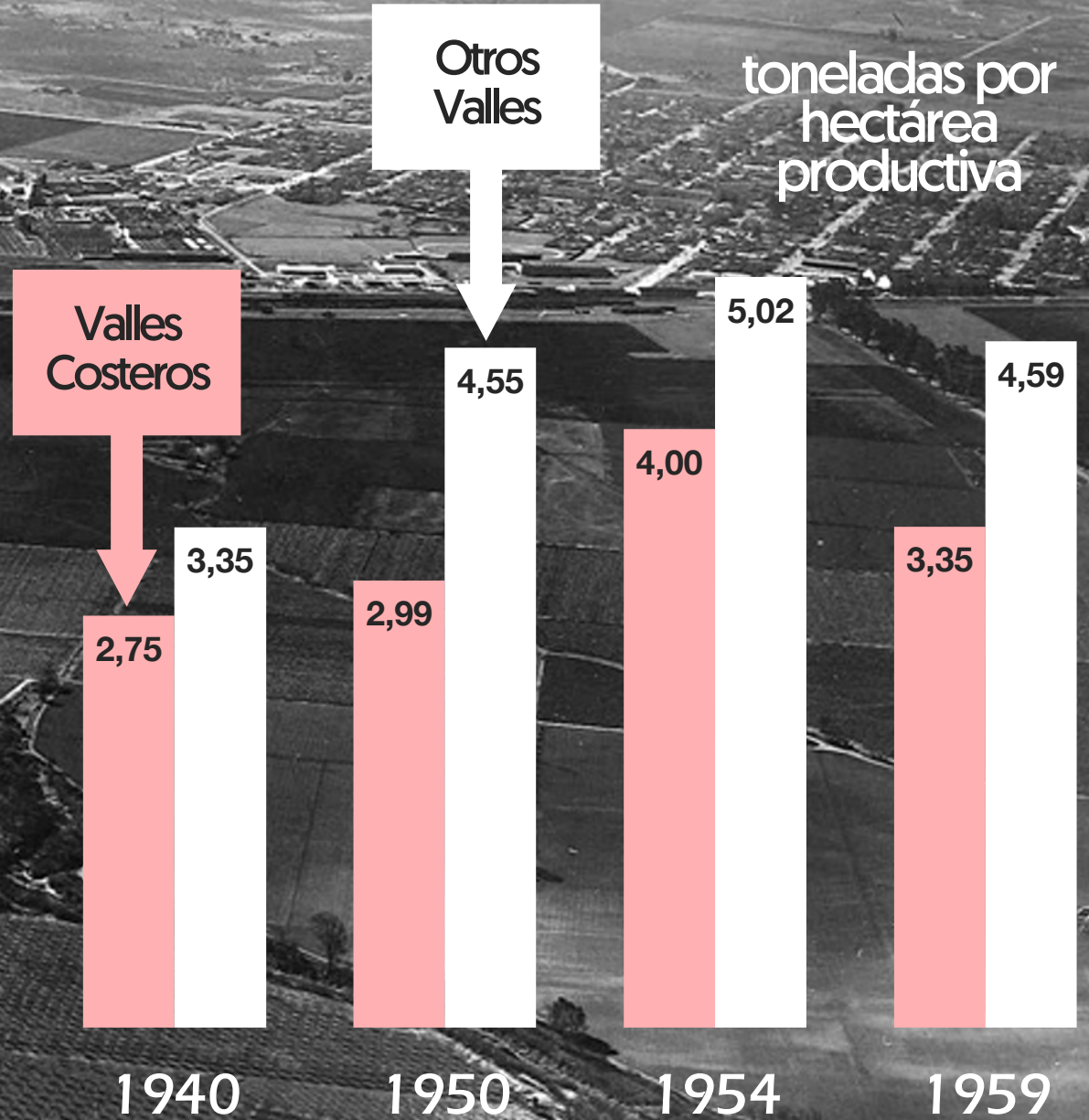


2º CICLO

1930 a 1960

LA SALIDA DE LOS
VALLES COSTEROS

La sobreoferta de fruta, la menor productividad y el alto valor inmobiliario que alcanzaron los valles costeros motivaron el **arranque** del ciruelo para deshidratado en esas tierras



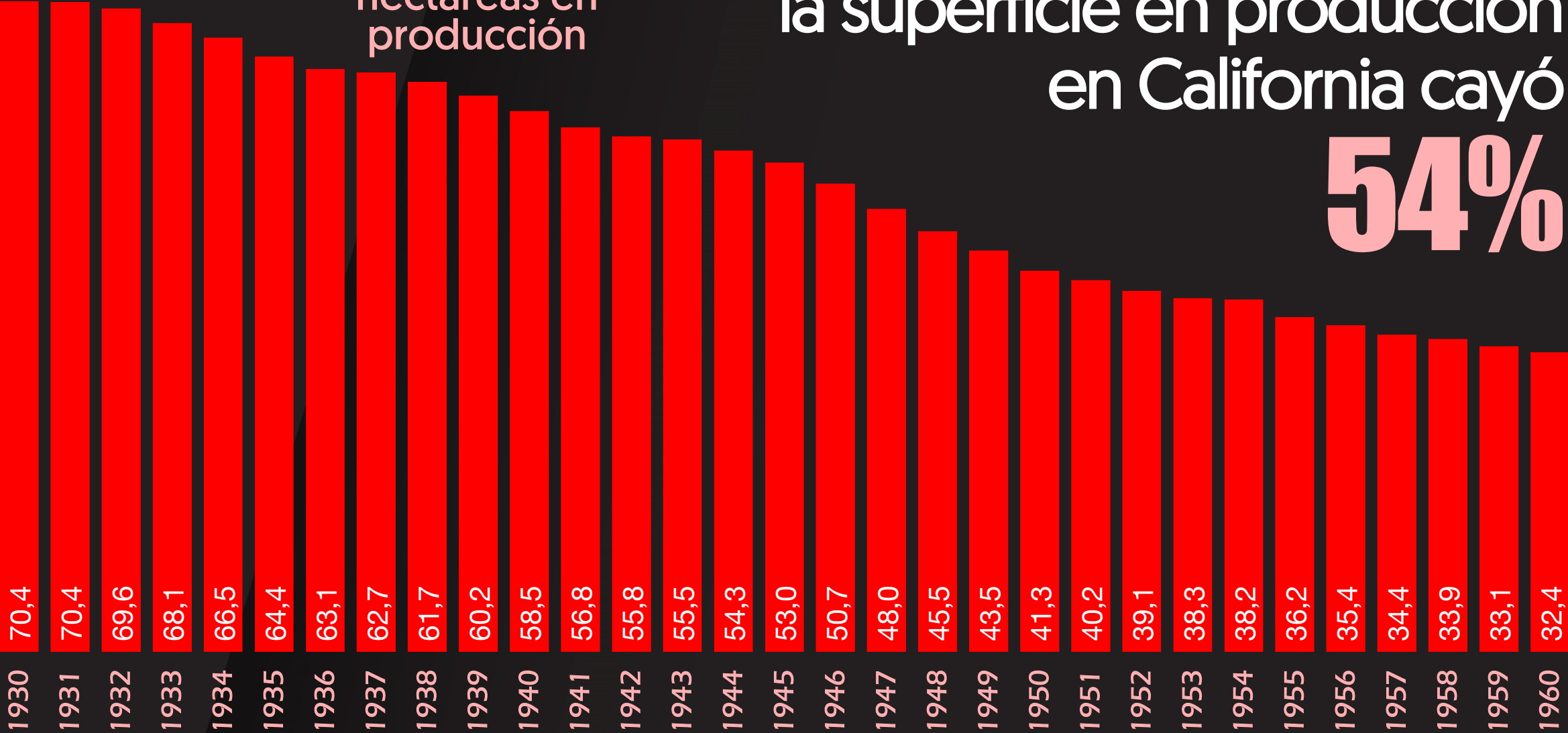


La superficie plantada con ciruelo para deshidratado cayó **48%** en los **Valles Costeros** entre las mediciones de **1936 y 1959**

Entre 1930 y 1960
la superficie en producción
en California cayó

54%

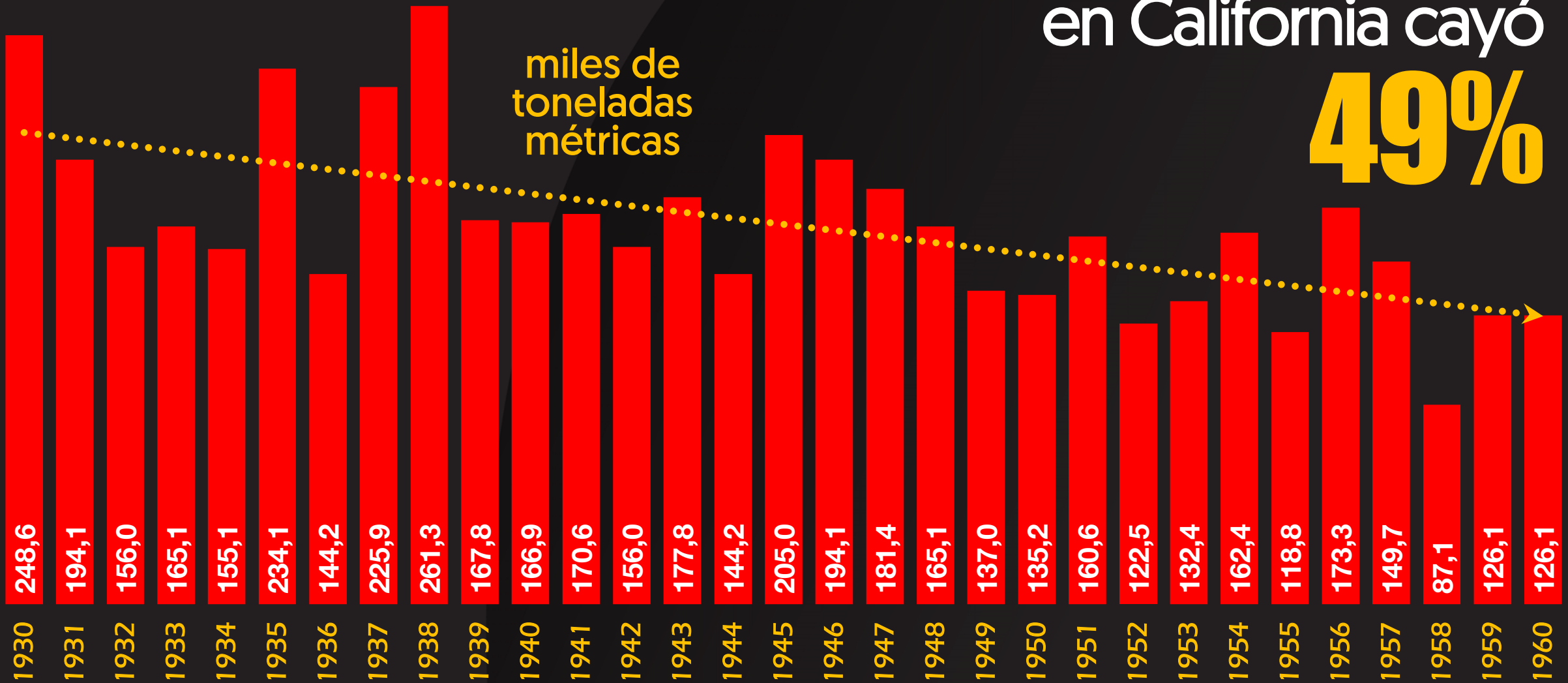
miles de
hectáreas en
producción



... Entre 1930 y 1960
la producción de ciruela seca
en California cayó

49%

miles de
toneladas
métricas





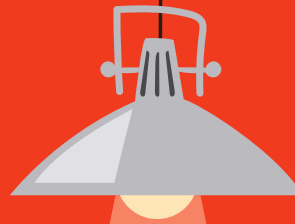
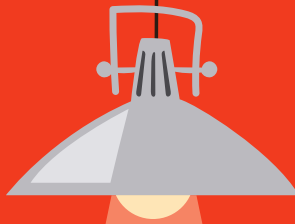
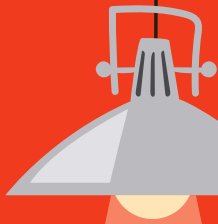
VALOR



PRODUCTIVIDAD



PROMOCIÓN



THE SATURDAY EVENING POST MARCH 15, 1933

These Juicy Different Prunes are Ready to Eat!



A Treat... A Wholesome Treat Just as They Come From the Carton

A new fruit treat from California... SUNSWEET Tenderized Prunes! A natural and wholesome collection just as they come from the carton. They're ready to eat.

Tenderized by the exclusive new SUNSWEET process. Tender and juicy, more delicious, more flavor-full than any other Prunes you have ever tasted. You'll like them.

Sweet with Nature's own wholesome fruit sugar. Full of energy. Full of goodness. SUNSWEETS are a good source of vitamins A and B (an extra rich source of Vitamin A—the growth vitamin). Rich, too, in the valuable mineral salts. Plump with fruit cellulose, food bulk in its natural and more valuable form—you need the bulk. A SUNSWEET breakfast is a good health breakfast.

Specially good for children. And children like them, too. Put a handful in the school lunch. Keep an open carton within reach for that big after-school appetite. Let the kiddies have all the Tenderized SUNSWEETS they can eat... cooked... uncooked... some way... every day.

SUNSWEETS are not only Tenderized, but Double-tenderized. They are then packed

by automatic machinery and safely sealed in new keep-fresh cartons which protect the fruit and preserve all its fresh, tender, juicy goodness from our orchard packaginghouse to your home kitchen.

These tender "Tasty" Prunes cook in half the time of prunes processed in the old way. No need to soak them. Just cover with water, simmer for thirty minutes, boil for ten minutes and they are done! Don't even add sugar unless you like prunes extra sweet, because these selected *super-sweet* SUNSWEETS are sweet enough for most tastes.

Be sure you get SUNSWEET Tenderized Prunes. Look for the name "SUNSWEET" on the front of the carton and the word "Tenderized" in bold type across the back of the carton. You then get (not only) California Prunes... but the finest of California Prunes... processed and packed in the finest way.

Only SUNSWEETS are *Double-tenderized*. Only SUNSWEETS are *Double-processed*. Only SUNSWEETS are sealed in this new-type keep-fresh carton. Best for cooking, best for eating right from the carton. Best in every way. Try them, just try them!

New Recipe Folder Free
Tells more interesting ways to prepare and serve SUNSWEET Tenderized Prunes and Apri-cots. Ask your grocer for a copy or write direct to CALIFORNIA PRUNE AND APRICOT GROWERS ASSOCIATION, Box 0, SAN JOSE, CALIF.

Green and Packed by CALIFORNIA PRUNE & APRICOT GROWERS ASSOCIATION, San Jose, California

SUNSWEET Tenderized PRUNES

A comienzos de los **30's** se lanzan en el mercado la **ciruela seca tiernizada** y el **jugo de ciruela deshidratada**

THE SATURDAY EVENING POST

NEW fruit treats from California
"SUNSWEET"
PRUNES · APRICOTS
PEACHES



And a New Natural Fruit Drink
Sunsweet JUICE of the PRUNE...



Just the pure, wholesome juice of the prune, bottled and ready to serve. Nothing added, nothing taken away. Rich in the valuable food minerals and well known prune goodness. An ideal fruit juice for adults or infants. And a natural fruit laxative... "drink to your own good health every day."

It's one of the many SUNSWEET Tenderized Fruit Treats packed by the growers in California, and offered with the growers' own guarantee of top quality.

Also, this season, you can buy Tenderized Prunes... Tenderized Apricots... Tenderized Peaches... all a thrilling adventure in tree-ripened, sun-sweetened, nature-cured goodness. Try them!

Write for new Recipe Folder, telling about these new SUNSWEET Tenderized treats and delicious ways to serve them. Address: CALIFORNIA PRUNE AND APRICOT GROWERS ASSOCIATION, BOX 0, SAN JOSE, CALIFORNIA.

Green and Packed by CALIFORNIA PRUNE & APRICOT GROWERS ASSOCIATION

SUNSWEET Tenderized FRUITS

SUNSWEET California FIGS
Selected California Figs of finest quality. Wholesome and nutritious. Sealed in California. Insect on SUNSWEETS.

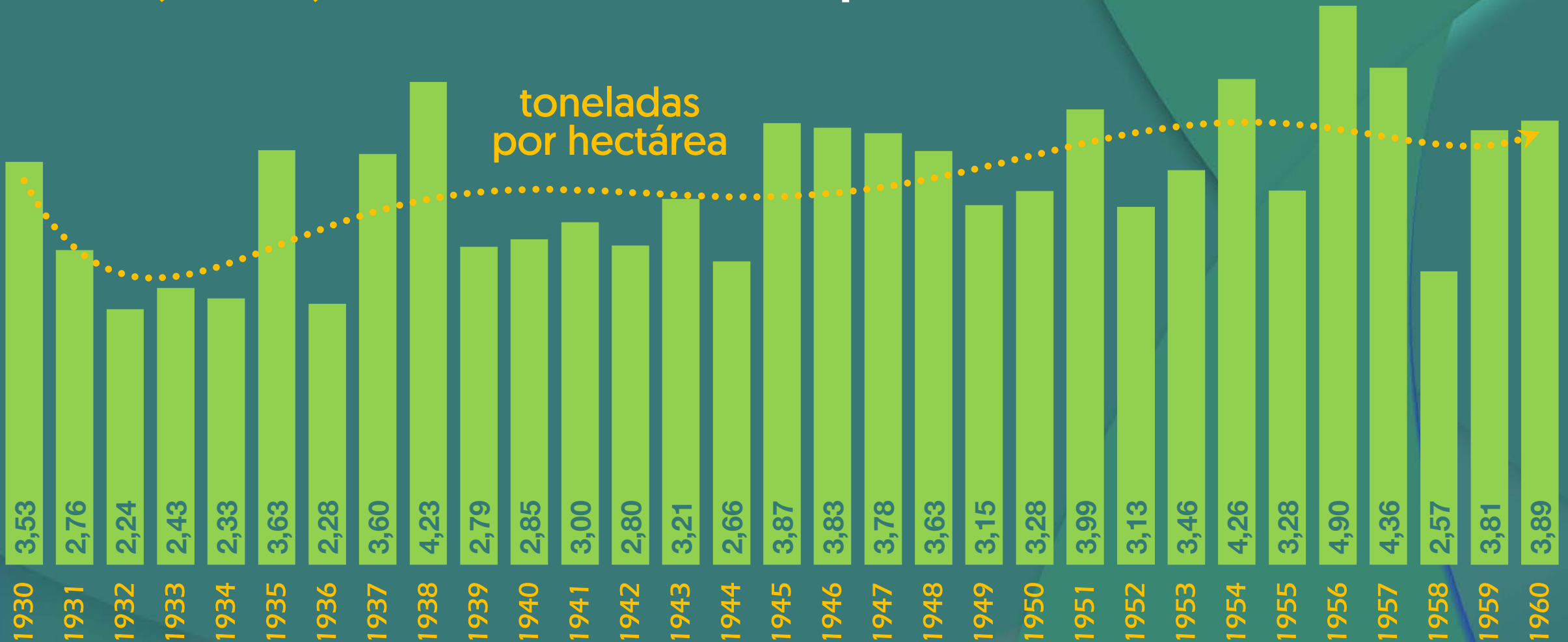
SUNSWEET California DATES
A delicious treat. Plump, juicy, fully ripe California Dates. Sealed in California. Be sure you ask for SUNSWEETS.

A mediados de los 50' se implementa
la cosecha mecanizada en el
Valle de Sacramento



Entre 1930 y 1960

la productividad media de California aumentó de **2,5** a **3,9** toneladas secas por hectárea





1933

Campaña "7-Day Bowl" de California Prunes promocionando el consumo diario de ciruela seca

Here's a new note for that dinner to-night!



California Prune Whip

Many an enticing dish just pops out!

Holiday Prune Pudding
 (Mrs. Marshall's recipe)
 1 cup dried California Prunes
 1/2 cup raisins
 1/2 cup currants
 1/2 cup almonds
 1/2 cup walnuts
 1/2 cup pecans
 1/2 cup hazelnuts
 1/2 cup macadamia nuts
 1/2 cup pineapples
 1/2 cup mangoes
 1/2 cup guavas
 1/2 cup papayas
 1/2 cup kiwis
 1/2 cup avocados
 1/2 cup coconuts
 1/2 cup cashews
 1/2 cup pistachios
 1/2 cup almonds
 1/2 cup walnuts
 1/2 cup pecans
 1/2 cup hazelnuts
 1/2 cup macadamia nuts
 1/2 cup pineapples
 1/2 cup mangoes
 1/2 cup guavas
 1/2 cup papayas
 1/2 cup kiwis
 1/2 cup avocados
 1/2 cup coconuts
 1/2 cup cashews
 1/2 cup pistachios

Try it—then send for new Recipe Book—See how many new ways you can serve California Prunes—Read about the "7-Day Bowl"—Here's a very simple answer to the menu-variation problem

From the "7-Day Bowl" make several new, appetizing treats—Get recipe book for full week's schedule of menu-variation—all made with full-flavored California Prunes

Here's a cheery answer to that eternal problem: "What shall I have for lunch today—or dinner tonight—or breakfast tomorrow?" And the answer is all wrapped up in a simple, handy, "package"—a 7-day supply of sweet, juicy California Prunes.

Just cook enough to fill a large bowl. Then place them in the ice-box. And presto! From this source new delights discovered by smart hostesses and famous chefs are easily and quickly made.

Good for the System, Too

California Prunes benefit the body, as well, for they contain several essential elements: Vitamin A, for increasing resistance to minor infections; vitamins B and G, too, for promoting appetite and

growth; minerals (iron, calcium and phosphorus) that build blood, bone and tissue; and natural fruit sugars, to supply quick energy. Prunes help regulate the body in a mild, natural way.

Ripened on the trees to full maturity in California sunshine, the new pack is now available at your nearest grocery. Ask for other new California Prune products, such as prune juice, prune bread and prune crush.

THE CORRECT WAY TO PREPARE PRUNES
 *(For "7-Day Bowl" and Complete of Prunes)
 First, wash the prunes with cold water. For quick preparation, place in pans cover with water and bring to a boil. Cook at boiling temperature for one hour. If a sweeter dish is desired, add 2 tablespoons of sugar for each cup of prunes during last five minutes of cooking. Many excellent cooks prefer to cover prunes with water and soak overnight, allowing slowly for two hours in the same water. Prunes may be served with or without cream. Just before serving, a little lemon juice may be added.

California Prunes—variety fruit deluxe! Note here the suggestions offered for "toning up" plain meals.—Many from recipe book and try others—"7-Day Bowl" design basic recipe (see "7-Day Bowl" description below) for here's the new way to vary menus and vary them deliciously and attractively. New salads—desserts and appetizers—and many another. All—a comote—and quickly made—and easy to make, and quickly made—and oh, so good to eat.

California Prunes are good food for the system. This natural fruit-food is fully ripened on the trees in the favored California sunshine. Prunes contain these essential elements: Vitamins A, B and G; essential elements: iron, calcium, phosphorus that build blood, bone and tissue; natural fruit sugars easily digested for quick energy; and, as every one knows, prunes help regulate the body in a mild, natural way. But you'll eat these prunes because they taste so good and make such delicious dishes.

Send the coupon today that shows how easy and quickly these many recipes can attractively and quickly be made. But, be made from the "7-Day Bowl." But, meanwhile, try California Prunes as suggested above, or your own favorite way.

Read here about the "7-DAY BOWL"

When you receive your recipe book, mark your 7 favorites. Then cook a week's supply your 7 directions are in the book). Place this 7-day bowl in the refrigerator and from day one of your favorite 7 recipes each day for a week. Note the great variety offered—possibilities of serving a new delight every day. Here's a real adventure in meal preparation—a real answer to the monotony menu problem. Send for free Recipe Book NOW!

California prunes
EVERY DAY IN SOME WAY

UNITED PRUNE GROWERS OF CALIFORNIA, Dept. B-G-3, 343 Sansome St., San Francisco, California.

Please send me FREE copy of the Prune Recipe Book.

Name _____ Street _____
 City _____ State _____

California prunes
EVERY DAY IN SOME WAY

UNITED PRUNE GROWERS OF CALIFORNIA, 343 Sansome St., Dept. B-G-3, San Francisco, California.

Please send me FREE copy of the Prune Recipe Book.

Name _____ Street _____
 City _____ State _____

1934

Campaña de California Prunes promocionando el "descubrimiento" de un agente activo laxante en la ciruela seca

Science discovers a new

LAXATIVE AGENT

(active)

... in this delicious brandied fruit cake—a holiday favorite

A new active, laxative agent has been discovered in prunes—a principle not known to be contained in any other fruit or food.

It is a pure-food substance, grown right into the fruit by Nature and so is in addition to the smooth bulk of prunes long recognized as an aid to proper elimination.

Your physician knows of this and can tell you, too, of the important vitamins prunes contain—A, B and G; the essential minerals, the natural fruit sugars, and that California Prunes do not affect the alkaline reserve.

So serve California Prunes regularly—because they're good and for the good they do. Write for new, free recipe book describing many ways to serve this delicious fruit including the cake shown above. (Prunes add flavor to all fruit cakes and help keep them fresh and moist.)

UNITED PRUNE GROWERS OF CALIFORNIA
Dept. 12-GH-4, 343 Sansome St.
San Francisco, California

California prunes



Susan Hayward, co-star in the Walter Wanger production "SMASH UP!" is pictured here in the charming period costume which she wore during the filming of her previous Technicolor production, "Canyon Passage."

A BUSY DAY IN THE STUDIO LIFE OF SCREEN ACTRESS SUSAN HAYWARD

It's not all fun and fame, this business of being a successful screen actress. No, indeed! There's hard work and plenty of it. And it takes real stamina to keep you going—the stamina that comes from plenty of sleep, lots of good fresh air, relaxing exercise, and the right food. Food that's light, easily digestible, yet packed with energy-giving vitamins to keep you going. Let's see how popular Susan Hayward of Universal Pictures does it.



A busy day at the Universal portrait studio. Takes and re-takes... hot lights... heavy costumes... yes, indeed, these young women work, and play! Ray Jones, chief of the "still" photo department, is making portrait studies of Susan Hayward.



One short hour for lunch doesn't leave time for fancy feasts. But Susan Hayward has learned the quick SUNSWEET Trick. She fills her casserole (or a quart jar) with SUNSWEET prunes, enough for several days ahead, adds boiling water, replaces the lid, and sets them away for the juice to thicken.

What a treat! Big, plump, tender SUNSWEET Prunes are natural fruit goodness. Brimful of energy, too—the quick pick-up that sets tired workers off on a fresh start. They're rich in natural vitamins and minerals, too.

SUNSWEET "Tenderized" Prunes are California's finest prunes to start with... sun-ripened for full flavor... "Tenderized" for extra tenderness and quick cooking... hot, packed in foil to protect them from light, heat, dust, and air... packed and guaranteed by the growers themselves. Sold in more stores than any other brand... served on more good. For free illustrated recipe book, address SUNSWEET, Box P, San Jose 5, California.



*The Quick SUNSWEET Trick

Fill a quart jar with SunSweet "Tenderized" Prunes and boiling water to cover. Replace the lid, that's all! Good the next day, longer the day after. The longer they stand, the thicker the syrup.



Noontime at last, and Susan Hayward leaves the portrait studio for her longish dressing room on the Universal lot. Here in a miniature kitchenette, completely equipped, she prepares her lunch like the little housewife she is at heart.

Uso de Celebrities durante la 2ª Guerra Mundial para promover el consumo doméstico de ciruela seca

1952


Turn back the clock to this
OLD-TIME HOSPITALITY

Old favorites are even better than you remember—when made with prunes from the DEL MONTE Brand Dried Fruit family! And you're sure of dependable quality, so extra-important in dried fruits, whenever you buy DEL MONTE.

PRUNE-APPLE DUMPLINGS

36 DEL MONTE Prunes	1 cup powdered sugar	¼ teaspoon salt
2 Tablespoons shortening	¼ cup soft butter	¼ cup juice from
2 cups biscuit mix	or margarine	cooked prunes
6 small apples	Grated peel and juice	of 1 small lemon
peeled and cored	¼ cup water	¼ cup sugar


Cook prunes unsweetened; pit. (See how tender they stew up, yet don't get mushy? The special "Natural Flavor" process does it.) Cut shortening into biscuit mix; prepare as usual. Divide into 6 equal parts; roll very thin in about 6" circles. Cut out small piece of apple on 4 sides. Put 1 prune in center. 1 in each cut-out. (Quality shows! DEL MONTE Prunes are selected from California's best, full and plump.) Place in center of dough circle. Cream powdered sugar with butter, lemon peel, salt, to make hard sauce. Spread ½ tsp. on top of each apple. Bring dough to top; pinch together, letting prunes show through opening. Mix lemon juice, juice from prunes, water and sugar in 9" square baking pan. Heat to boiling. Place dumplings in syrup. Bake in moderately hot oven (400° F.) 45-50 min. or till golden brown. Top with rest of hard sauce and prunes. (Enjoy DEL MONTE Prunes stewed for breakfast, noon, or right from the carton. So tasty—and such a healthful aid to natural regularity!)



a great name for flavor in dried fruits, too

Del Monte

PRUNES • RAISINS • PEACHES • APRICOTS



1953

FREE at your grocer's...NEW RECIPES for
Budget-Happy DESSERTS

Now's the time to discover the budget-wise wonders of Sugaripe fruit. Six new, family-pleasing dessert recipes are waiting for you at your grocer's. They're all quick 'n easy... all economical... all filled with the ripe, rich flavor of Sugaripe fruit. Make them soon!



Try this easy, elegant
Sugaripe
PEACH 'N PRUNE UPSIDE DOWN CAKE
 Serves 8 for only 7c a serving

¼ cup butter	2½ tps. baking powder
¾ cup brown sugar (packed)	¼ tsp. salt
6 cooked Sugaripe peaches	½ cup shortening
16 cooked Sugaripe prunes	½ cup milk
1½ cups sifted cake flour	1 egg
1 cup granulated sugar	1 tsp. vanilla extract

Melt butter in bottom of 9" square pan. Combine with brown sugar and 2 tps. prune juice. Arrange peaches and pitted prunes in mixture. Shift together flour, sugar, baking powder and salt. Add shortening and about half of milk. Beat 2 min. (200 strokes). Add remaining milk, unbeat egg and vanilla and beat 2 min. longer. Turn batter carefully over fruit in pan. Bake in moderate oven (350° F.) about 1 hour. Let stand 10 minutes. Invert over serving plate. Serve warm.

AT YOUR GROCER'S NOW...RECIPES FOR

- 1 Sugaripe UPSIDE DOWN CAKE
- 2 Sugaripe GOLDEN PEACH PIE
- 3 Sugaripe PRUNE SNOW
- 4 Sugaripe APPLE PIE
- 5 Sugaripe FRUIT BARS
- 6 Sugaripe LUNCHBOX TURNOVERS

Flavo-Fresh
Sugaripe fruit
 RAISINS • PRUNES • APRICOTS • PEACHES • APPLES • MIXED FRUITS • NUTS

Campaññas de promoción de la ciruela seca por "ocasión de uso" mediante la entrega de recetas de cocina

1955

Campaña promocionando las bondades como laxante del jugo de ciruela

Sunsweet in the morning



gives me a lift for the day

SUNSWEEP PRUNE JUICE tastes brisk and delicious—and it's *naturally* good for you.

Only Sunsweet, you see, knows how to control the gentle laxative in prunes—so you get the same amount of laxative strength in each glass.

Plus minerals galore, of course—lots more than other breakfast juices. You'll keep going strong all day long when you say "good morning" the Sunsweet way.

Sunsweet in the morning



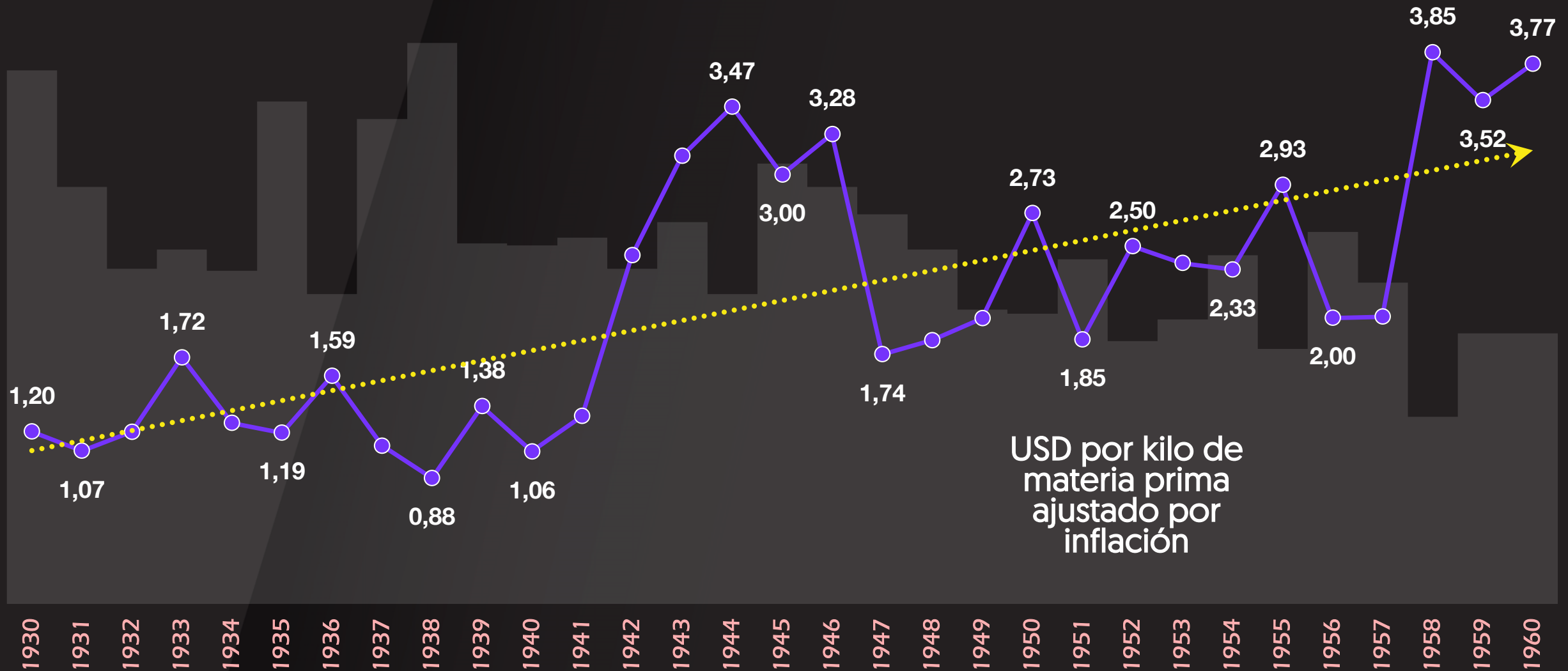
is my dish for a swell day

SUNSWEEP PRUNE JUICE tastes brisk and really *different* from other breakfast juices.

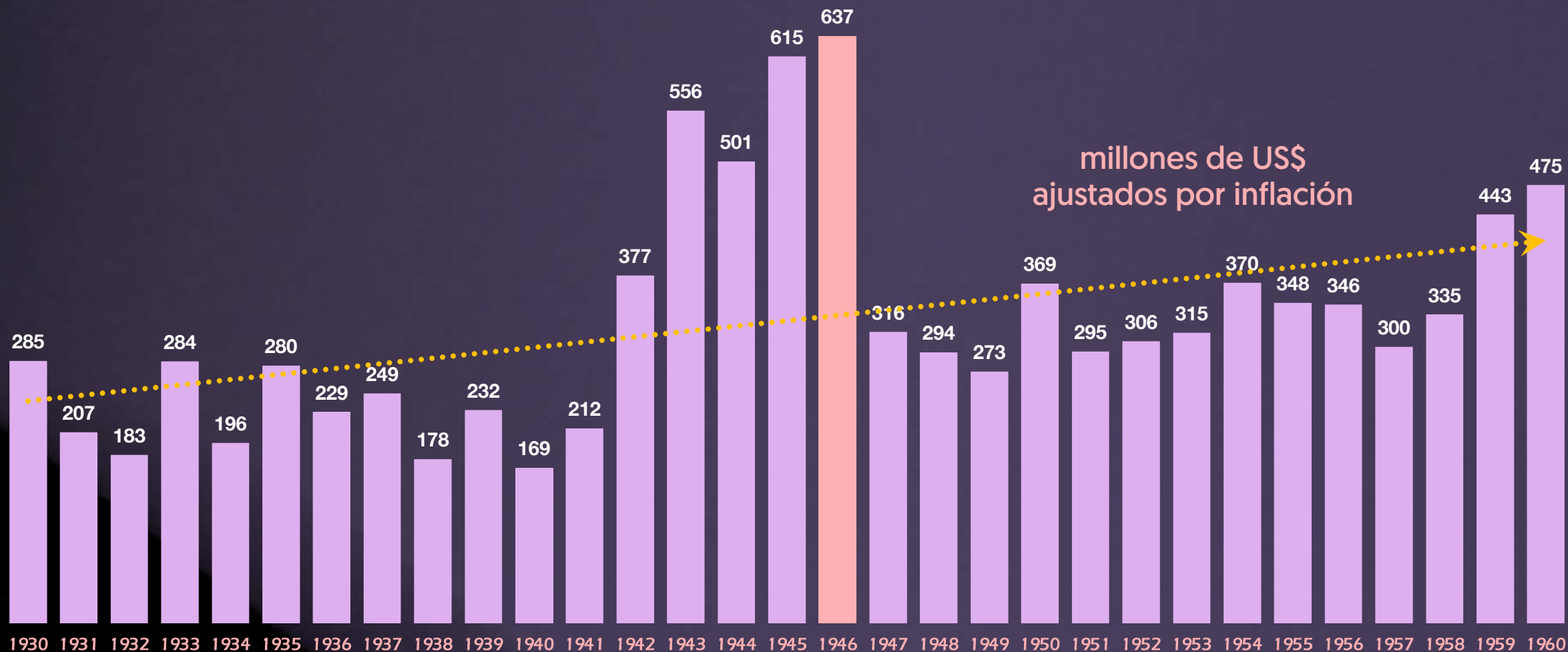
Unlike *other* prune juices, Sunsweet has the same amount of gentle laxative in every glass. *Only* Sunsweet knows how to control the laxative in fine prunes. It's *full-bodied*... *never* diluted... has more food value, minerals and quick-energy sugar.

Prune juice is important to you. Always drink the very best—**SUNSWEEP PRUNE JUICE**.

La disminución de la oferta permitió que los retornos a productor mejoraran en California



El valor de la producción de California alcanzó su **peak histórico** en ocasión de la 2ª Guerra Mundial





En **1960** la producción mundial de ciruela seca cae a **148.778** toneladas métricas ... **85%** proviene de California

Grandes números de California en 1959



6.139 operaciones agrícolas

126.099

Toneladas de producción

20,5 toneladas
| operación



33.103

Hectáreas en producción

5,4 hás. | operación

8.902

Hectáreas en desarrollo

1,5 hás. | operación

42.005

Hectáreas totales

6,8 hás. | operación

3,8 toneladas
| há. en producción



6.631.275

Árboles en producción

200 árboles | há.

2.339.667

Árboles en desarrollo

263 árboles | há.

8.970.942

Árboles totales

214 árboles | há.

19 Kg.
| árbol en producción

3^{er} CICLO

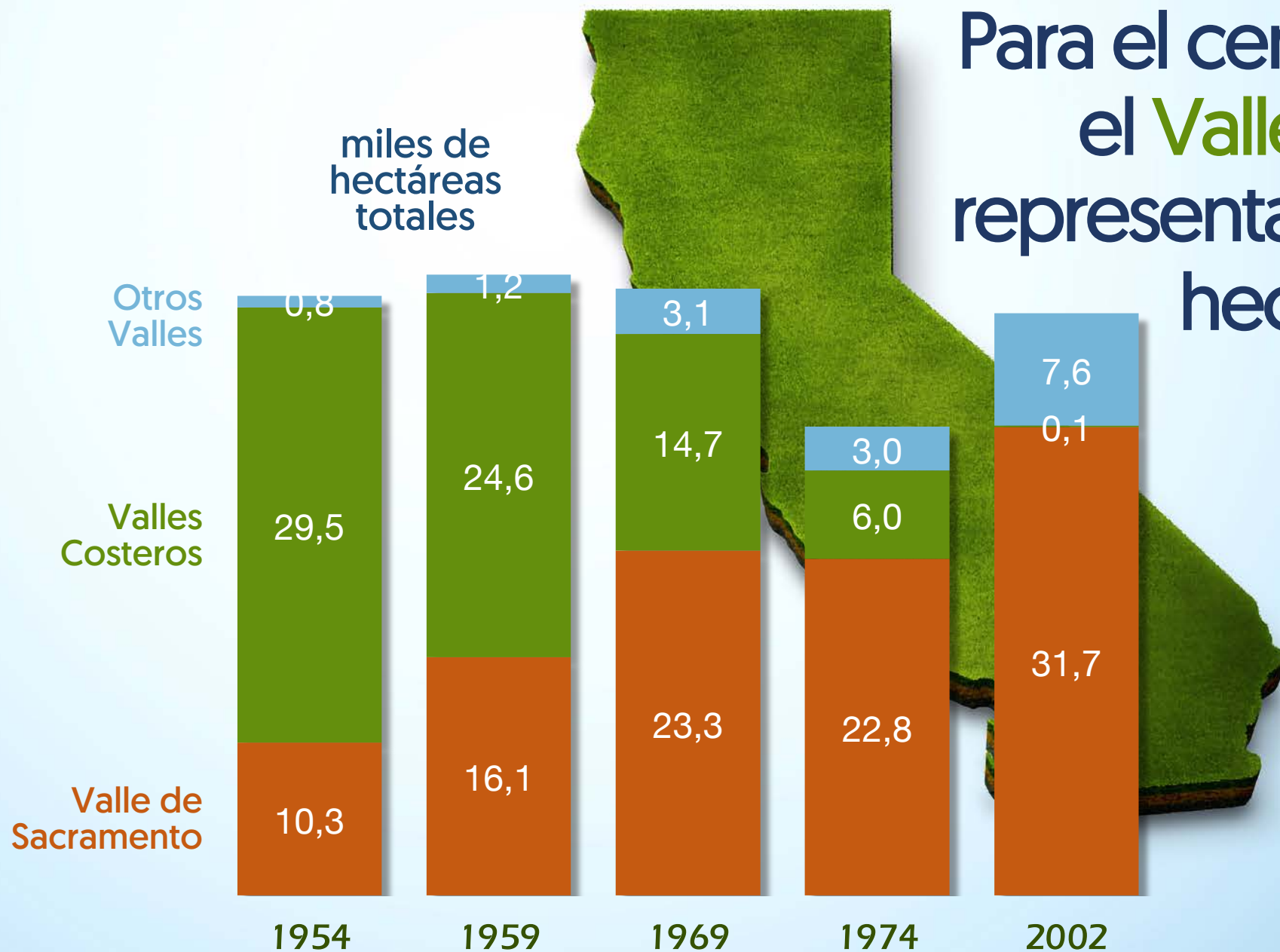


1960 a 2001
EL AUGE DE
SACRAMENTO

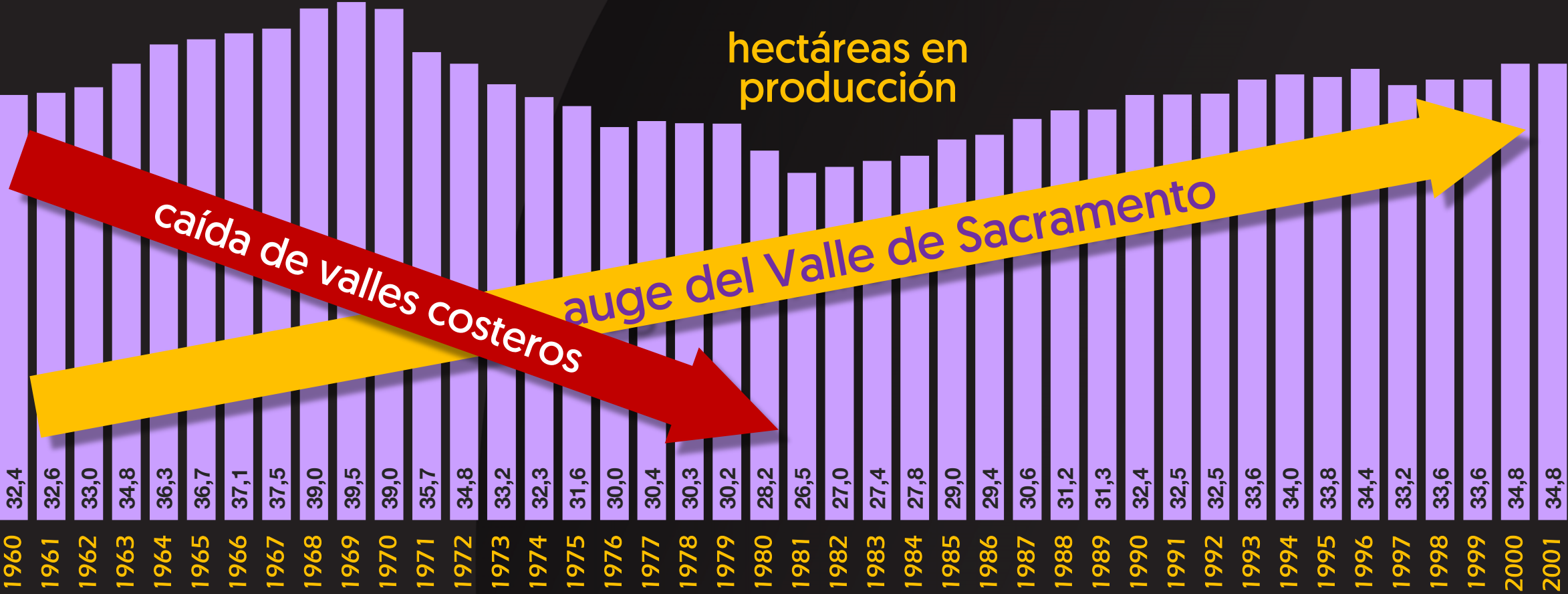
A partir de 1960 es el Valle de Sacramento el que impulsa las plantaciones de California ...

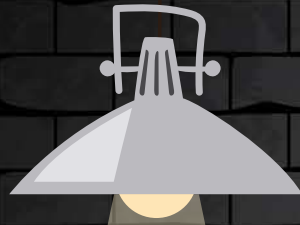


Para el censo del año 2002
el Valle de Sacramento
representaba el 80% de las
hectáreas plantadas

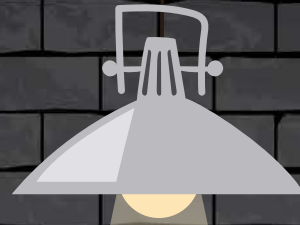


Entre 1960 y 2001 la caída de los valles costeros y el auge del Valle de Sacramento mantiene la superficie en producción en torno a las 34 mil hectáreas

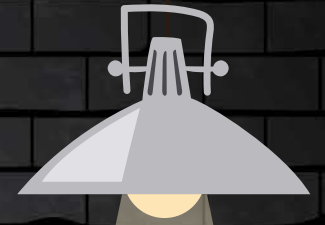




VALOR



PRODUCTIVIDAD



PROMOCIÓN

HAVING DISCOVERED THE NEW PITTED PRUNE:

John Wells pronounced the flavor in pitted prunes incredibly delicious—and now jogs for a half hour every morning.

Jimmy Wells missed the pits.

Mary Jane Wells, who loves sweets, flipped when she tasted new pitted prunes. (We won't tell her prunes are also good for her.)

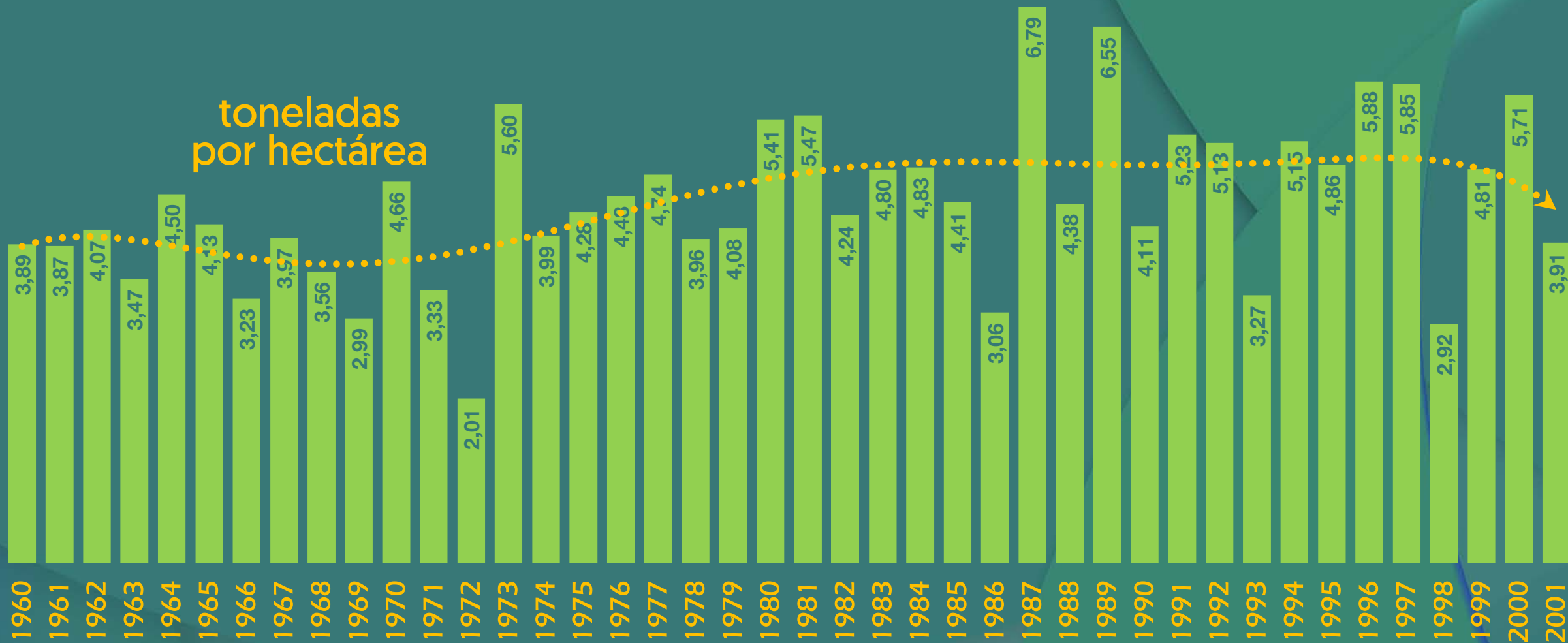
Mrs. Ann Wells snipped up half a cup and stirred them into her cake mix. She found the idea in: 101 Ideas with The Party Prune. If you'd like a copy, write to The California Prune Board, P.O. Box 77583, San Francisco, California 94107.



En 1965
California lanza
la ciruela seca
descarozada

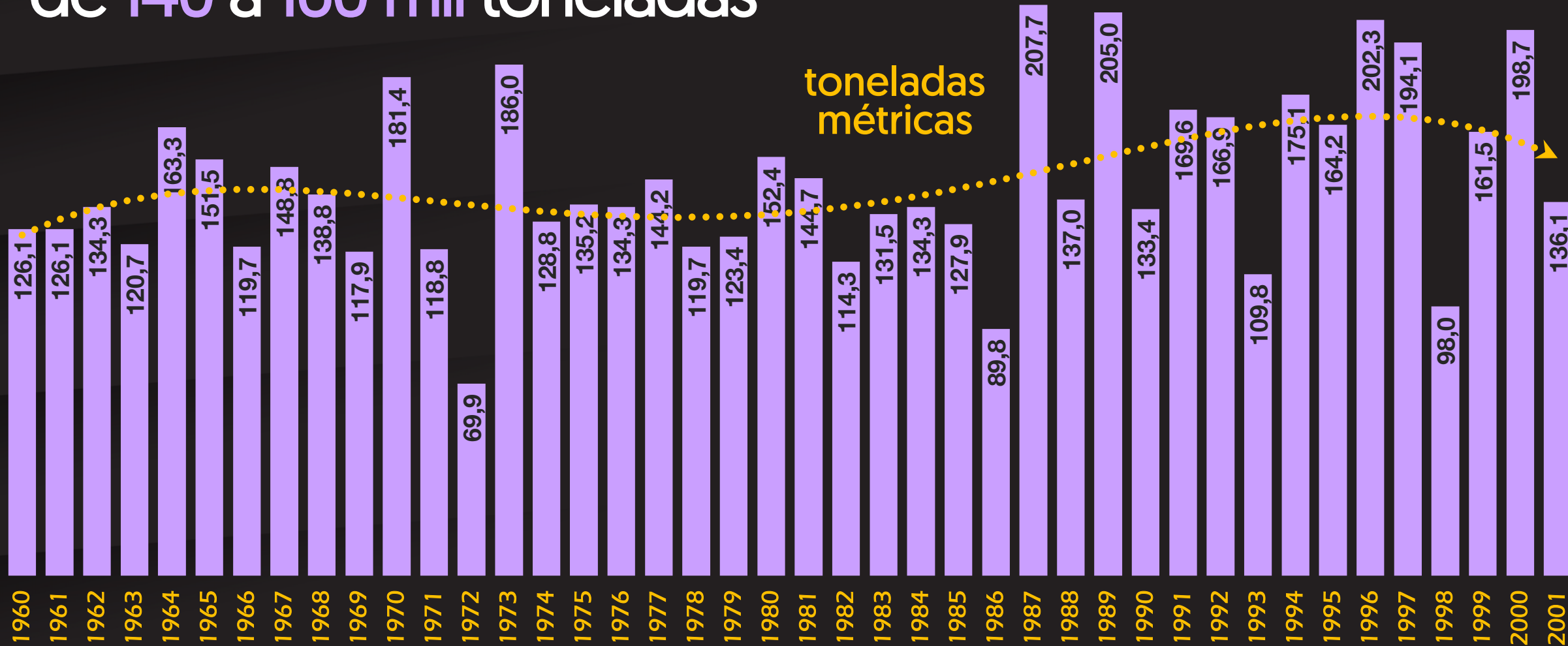
Entre 1960 y 2001

la productividad media en California aumentó de **3,9** a **4,8** toneladas secas por hectárea

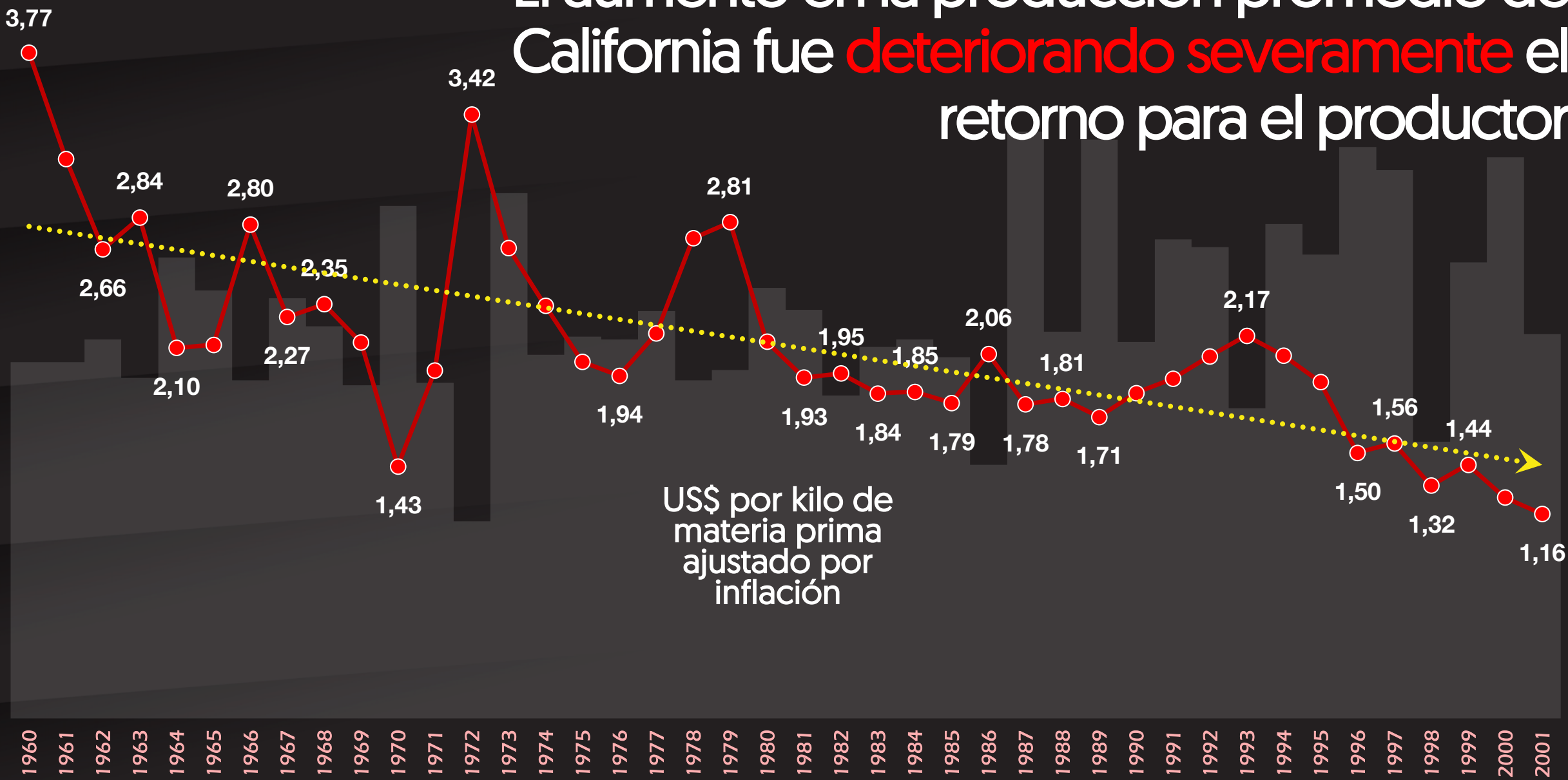


Entre 1960 y 2001

la producción media de California aumentó
de 140 a 160 mil toneladas

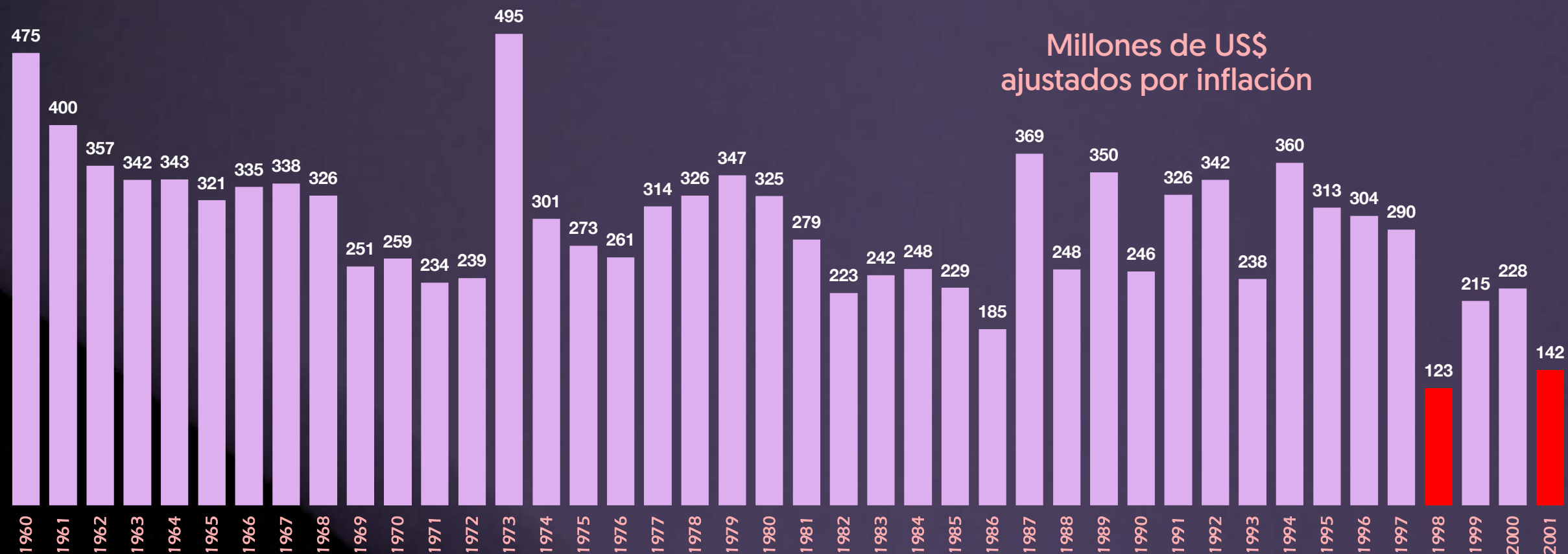


El aumento en la producción promedio de California fue **deteriorando severamente** el retorno para el productor



US\$ por kilo de materia prima ajustado por inflación

El año **2001** el monto total real recibido por los agricultores por la producción de ciruela seca de California fue de **US\$ 142** millones y de **US\$ 123** millones tres años antes...



...Los años **1998** y **2001** el monto total real recibido por los agricultores por su producción fue el **más bajo desde 1918**





El 2001 California **sí** enfrenta competencia ...

... y ahora representa el **56%** de la producción mundial



¿EL OCASO DEL OSO?

Grandes números de California en 2001



1.150 operaciones agrícolas

136.078

Toneladas de producción

118,3 toneladas
| operación



34.902

Hectáreas en producción

30,3 hás. | operación

4.492

Hectáreas en desarrollo

3,9 hás. | operación

39.394

Hectáreas totales

34,3 hás. | operación

3,9 toneladas
| há. en producción

Grandes números de Chile en 2004



448 operaciones agrícolas

35.000

Toneladas de producción

78,1 toneladas
| operación



4.515

Hectáreas en producción

10,1 hás. | operación

3.549

Hectáreas en desarrollo

7,9 hás. | operación

8.064

Hectáreas totales

18,0 hás. | operación

7,8 toneladas
| há. en producción

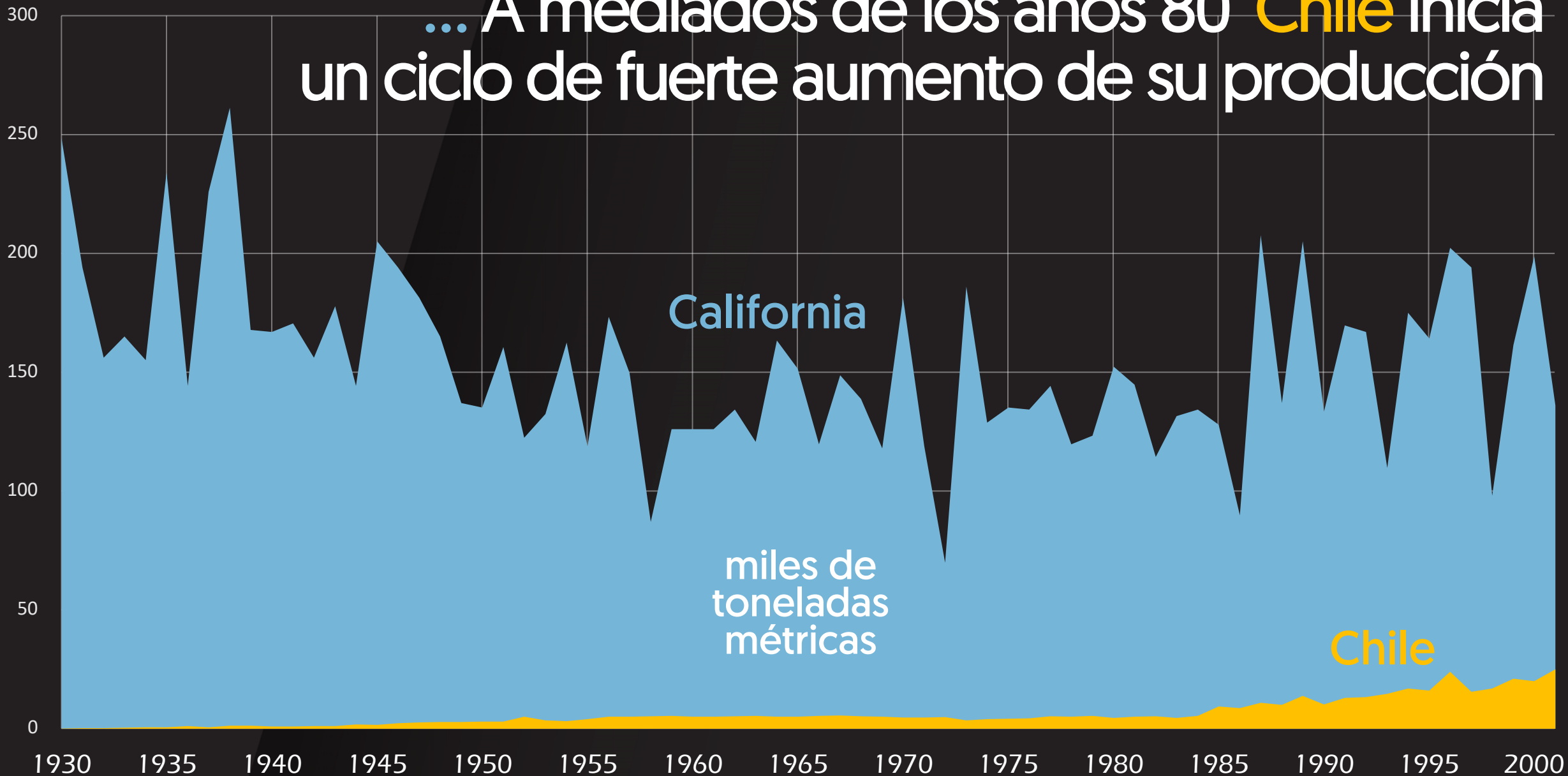
A cougar stands on a rocky outcrop in a mountainous landscape. The scene is bathed in warm, golden light, suggesting sunrise or sunset. The background features rugged, rocky mountains and a dense forest of trees with autumn foliage in shades of yellow and orange. A large, leafless tree stands prominently in the mid-ground. The overall atmosphere is serene and majestic.

4° CICLO

2001 a 2021

UN NUEVO LÍDER

... A mediados de los años 80' **Chile** inicia un ciclo de fuerte aumento de su producción



El ciclo de crecimiento de Chile tuvo base en mercados secundarios para California como México y Brasil

Destino	exportaciones chilenas en toneladas métricas													%
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	90-01	
México	1.908	3.111	4.400	4.276	5.848	3.261	4.079	4.744	4.924	6.800	6.516	8.947	58.813	30%
Brasil	5.003	2.392	2.164	3.795	1.819	5.690	5.109	5.321	5.385	3.453	3.242	3.338	46.713	24%
España	575	653	521	580	300	737	225	980	2.690	2.437	1.640	1.330	12.667	6%
Perú	380	359	713	568	596	815	856	1.040	1.146	1.086	1.110	1.367	10.037	5%
Colombia	518	526	350	364	722	859	899	1.163	806	891	931	826	8.853	5%
Alemania	0	0	0	0	0	205	280	460	1.056	2.073	1.640	2.628	8.342	4%
Otros	4.613	2.591	3.923	2.708	4.316	4.136	3.302	3.507	2.829	4.522	5.617	7.739	49.803	26%
Total	12.998	9.632	12.071	12.291	13.601	15.702	14.750	17.216	18.835	21.260	20.696	26.175	195.228	100%

Regulations Governing the California Prune/Plum (Tree Removal) Diversion Program

AGENCY: Agricultural Marketing Service, USDA.

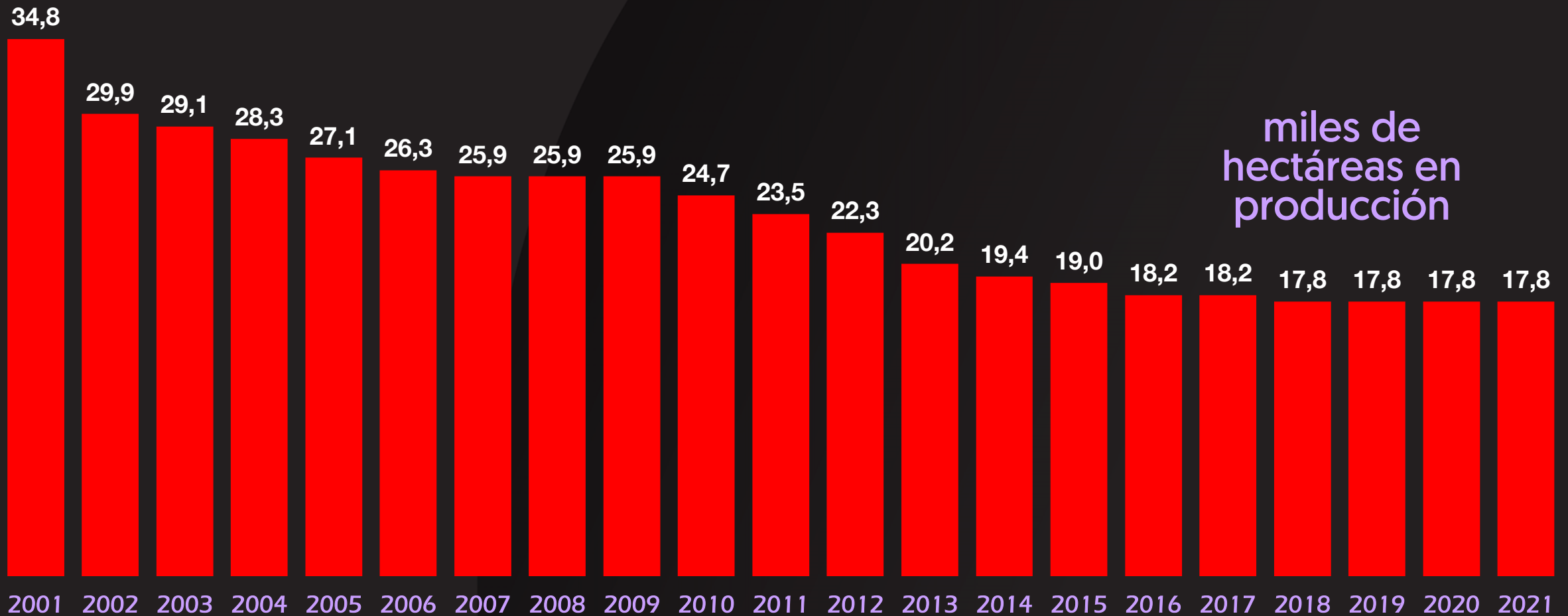
ACTION: Proposed rule with request for comments.

SUMMARY: This proposed rule invites comments on procedures for a California Prune/Plum Diversion Program. The program is voluntary and would consist wholly of tree removal. The program would be implemented under clause (3) of Section 32 of the Act of August 24, 1935, as amended. The proposed program would help the California dried plum industry address its severe oversupply problems. The tree removal is expected to bring supplies into closer balance with market needs, and provide some relief to growers faced with excess supplies and acreage, and low prices.

DATES: Comments received by January 16, 2002, will be considered prior to issuance of a final rule.

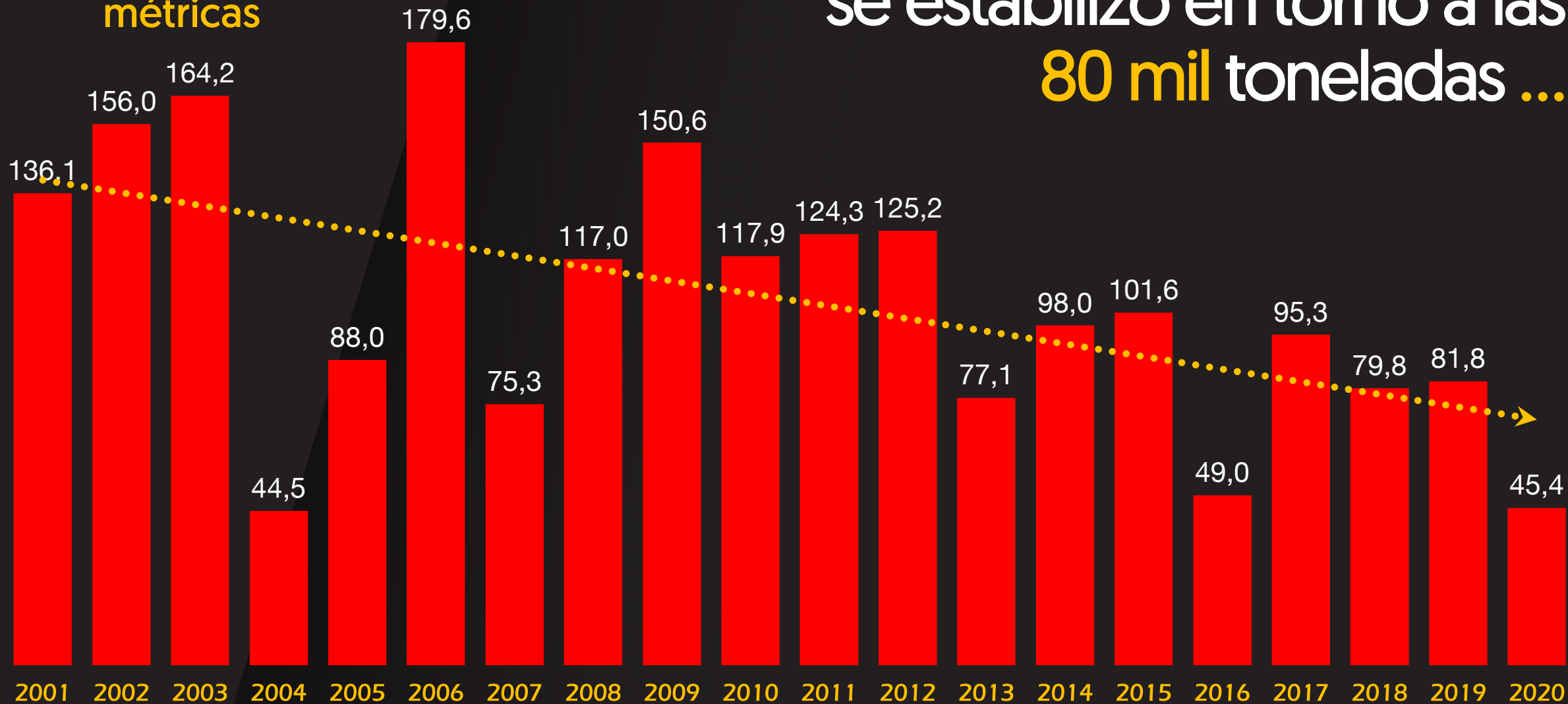
El 17 de diciembre de 2001 el Departamento de Agricultura de Estados Unidos lanza el programa de **arranque de plantaciones** de ciruela para deshidratado, con el objetivo de “acercar la oferta a un equilibrio con las necesidades del mercado y proveer cierto alivio a los productores afectados por el exceso de oferta y superficie, y los bajos precios”

A partir del tree removal program las hectáreas en producción en California cayeron 48% al 2016 ...



miles de toneladas métricas

... La producción de California se estabilizó en torno a las **80 mil toneladas** ...

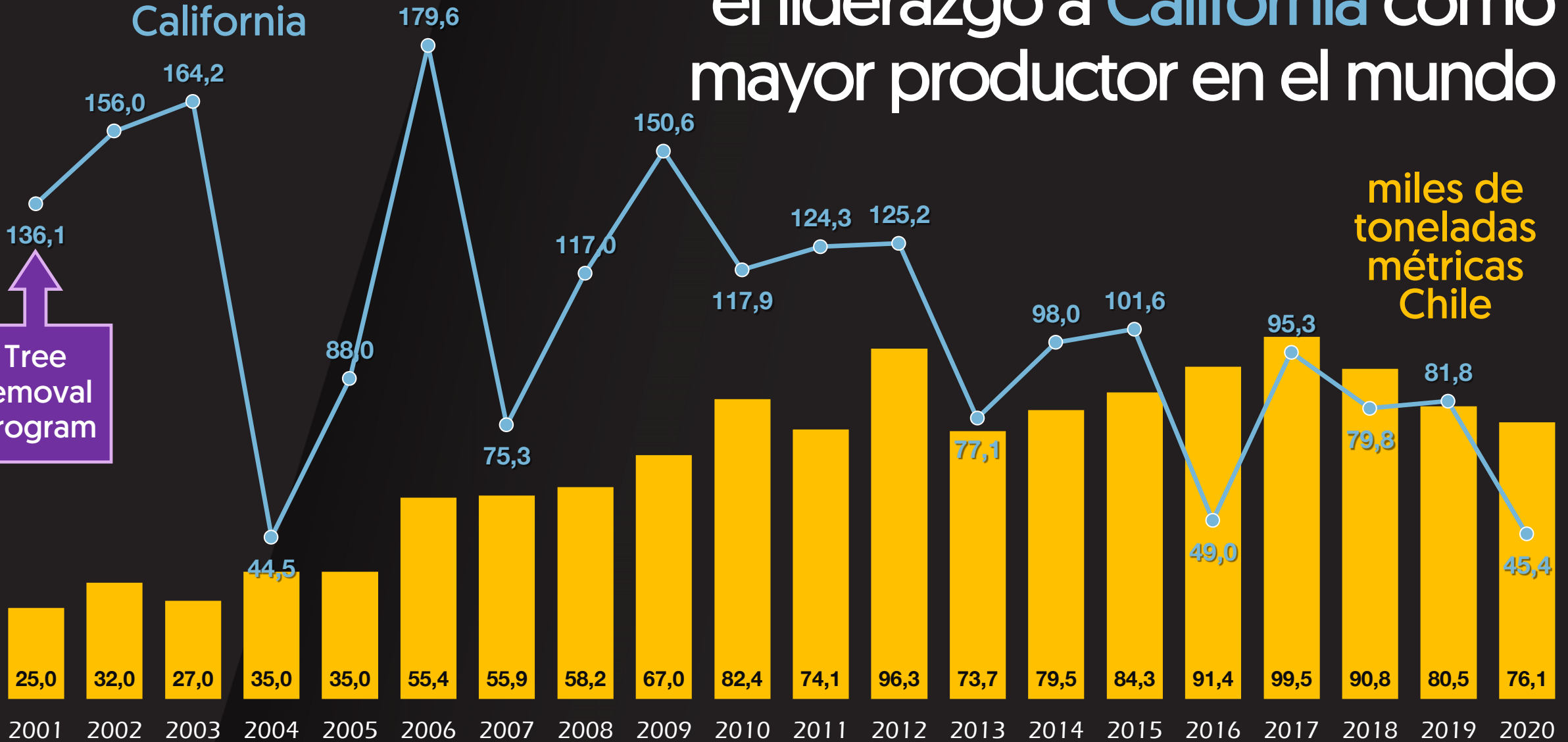


... y **Chile** comenzó a discutirle el liderazgo a **California** como mayor productor en el mundo

miles de toneladas métricas California

miles de toneladas métricas Chile

Tree removal program



A partir del 2001 **Chile** comenzó a desarrollarse en los principales mercados de California en **Europa**

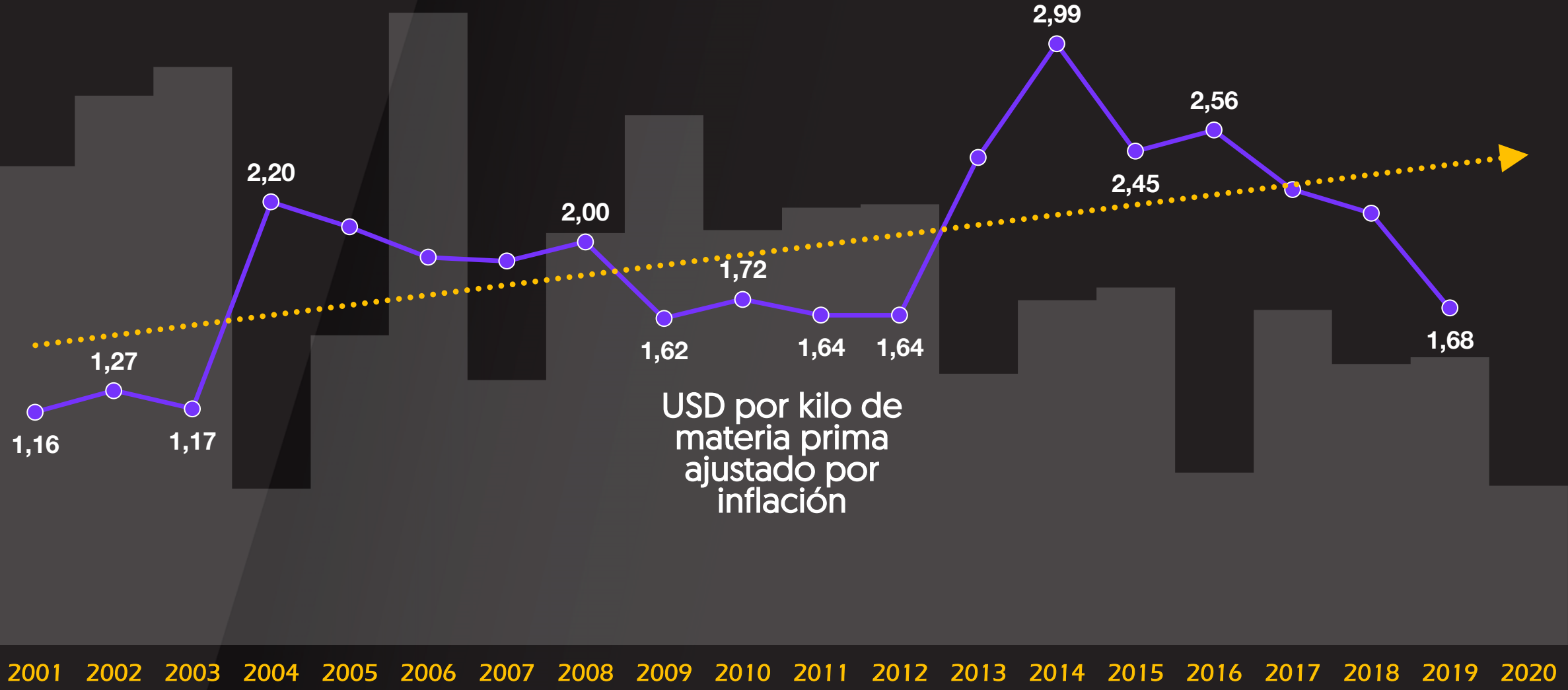
Destino	exportaciones chilenas en toneladas métricas					%	crec.% vs. 1996-2000
	2001-2005	2006-2010	2011-2015	2016-2020	2001-2020		
México	38.477	38.347	41.868	39.687	158.379	15%	+42%
Rusia	11.853	33.314	46.565	27.030	118.761	11%	+14.716%
Alemania	20.731	26.331	24.023	21.521	92.606	9%	+276%
Polonia	4.240	15.109	24.466	33.542	77.357	7%	+2.928%
Reino Unido	4.544	12.056	17.395	28.685	62.680	6%	+340%
Brasil	11.817	16.144	16.663	14.529	59.153	6%	-48%
Italia	6.064	12.957	17.590	18.968	55.580	5%	+205%
Estados Unidos	2.365	5.586	16.551	30.117	54.618	5%	+2.115%
España	6.402	8.681	14.199	13.669	42.951	4%	-20%
Holanda	2.907	6.155	7.889	7.710	24.660	2%	+72%
Otros	45.840	64.450	99.003	112.375	321.669	30%	+86%
Total Chile	155.239	239.131	326.212	347.831	1.068.414	100%	+67%

Hoy **Japón** es de los pocos mercados que California mantiene cautivo

Mercados de Chile	exportaciones en toneladas métricas			%
	2011–2015	2016–2020	2001–2020	
México	41.868	39.687	81.554	12%
Rusia	46.565	27.030	73.594	11%
Polonia	24.466	33.542	58.008	9%
Estados Unidos	16.551	30.117	46.668	7%
Reino Unido	17.395	28.685	46.080	7%
Alemania	24.023	21.521	45.544	7%
Italia	17.590	18.968	36.558	5%
Brasil	16.663	14.529	31.192	5%
España	14.199	13.669	27.868	4%
China & Hong Kong	4.701	17.496	22.197	3%
Otros	102.191	102.589	204.780	30%
Total Chile	326.212	347.831	674.044	100%

Mercados de Estados Unidos	exportaciones en toneladas métricas			%
	2011–2015	2016–2020	2001–2020	
Japón	56.822	31.226	88.047	18%
Alemania	51.495	22.298	73.793	15%
China & Hong Kong	30.578	17.258	47.836	10%
Canadá	23.629	13.073	36.702	7%
Italia	17.846	7.251	25.096	5%
Reino Unido	14.668	3.447	18.115	4%
Australia	11.125	6.222	17.347	4%
Vietnam	7.852	9.405	17.257	4%
México	5.460	10.456	15.916	3%
Israel	9.581	4.886	14.467	3%
Otros	90.466	45.575	136.041	28%
Total USA	319.521	171.095	490.617	100%

El **tree removal program** del 2001 tuvo efectos casi inmediatos en los retornos a productor de California ...



... lo que permitió que con casi la mitad de superficie en producción, se mantenga el monto total recibido por los agricultores de California



Grandes números de California en 2017



606 operaciones agrícolas

95.255

Toneladas de producción

157,2 toneladas
| operación



18.552

Hectáreas en producción

30,6 hás. | operación

2.262

Hectáreas en desarrollo

3,7 hás. | operación

20.814

Hectáreas totales

34,3 hás. | operación

5,1 toneladas
| há. en producción

Grandes números de Chile en 2020



586 operaciones agrícolas

84.567

Toneladas de producción

144,3 toneladas
| operación



10.722

Hectáreas en producción

18,3 hás. | operación

2.516

Hectáreas en desarrollo

4,3 hás. | operación

13.238

Hectáreas totales

22,6 hás. | operación

7,9 toneladas
| há. en producción

Grandes números de California en cada ciclo y su comparación actual con Chile

Origen	Ciclo Censo	Número de Operaciones	Hás. Totales	Hás. Operación	Hás. Productivas	Ton. Cosecha	Ton. Operación	Ton. Há.
California	1° 1930	17.553	76.542	4,4	70.436	248.569	14,2	3,5
California	2° 1959	6.139	42.005	6,8	33.103	126.099	20,5	3,8
California	3° 2001	1.150	39.394	34,3	34.902	136.078	118,3	3,9
California	4° 2017	606	20.814	34,3	18.552	92.255	157,2	5,1
Chile	4° 2020	586	13.238	22,6	10.722	84.567	144,3	7,9

A scenic landscape featuring a winding asphalt road with white dashed lines, leading through a rocky, grassy area. Large, mature trees with dense foliage are prominent on the right side. In the background, there are rolling hills and mountains under a soft, hazy sky. The overall atmosphere is serene and natural.

¿UN NUEVO CICLO?



Factores de
OFERTA



Factores de
DEMANDA



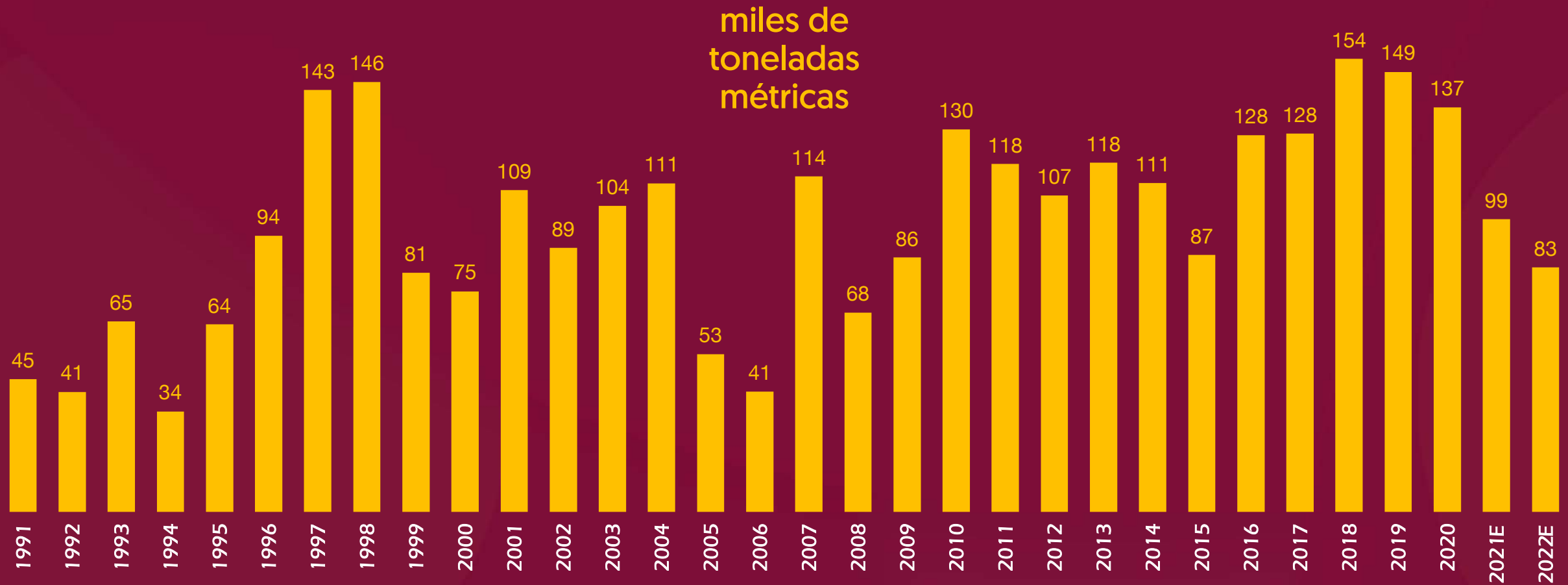
Tareas
pendientes de
competitividad

factores de **oferta** que pueden
definir un nuevo ciclo

La industria mundial de ciruela seca está viviendo la mayor contracción de oferta desde el **2004**

Origen	cosecha en toneladas métricas				
	2017	2018	2019	2020	2021
California	95.255	79.832	81.819	45.359	70.000
Chile	99.538	90.757	80.488	76.088	44.000
Francia	48.282	34.000	42.462	33.000	35.000
Argentina	13.037	50.364	16.567	21.488	15.000
Subtotal Big 4	256.112	254.954	221.336	175.935	164.000
Australia	4.500	1.100	3.028	2.000	1.500
Italia	890	1.350	1.830	1.200	1.200
Serbia	3.000	8.000	5.000	4.000	4.000
Sudáfrica	1.100	1.005	800	600	500
Total	265.602	266.409	231.994	183.735	171.200

Los inventarios pre-cosecha mundiales corroboran la contracción de oferta



La superficie plantada mundial no muestra signos de revertir su tendencia a la baja

Cosecha	Superficie plantada total en miles de hectáreas (estructura productiva)								
	California	Chile	Francia	Argentina	Big 4	Australia	Italia	Sudáfrica	Total
2009	28,7	14,2	13,0	12,9	68,9	1,4	0,5	0,4	71,2
2010	26,5	14,4	13,3	13,7	67,9	1,3	0,5	0,5	70,1
2011	25,1	14,2	13,6	18,3	71,1	1,3	0,5	0,5	73,4
2012	24,1	13,9	13,8	15,4	67,2	1,2	0,5	0,3	69,3
2013	21,9	13,6	13,9	15,5	64,9	1,2	0,5	0,3	66,9
2014	21,3	13,4	12,9	16,2	63,7	0,7	0,5	0,3	65,2
2015	20,6	13,3	12,0	17,1	63,1	0,7	0,5	0,3	64,5
2016	20,4	13,4	11,5	16,9	62,2	0,7	0,5	0,3	63,7
2017	19,8	13,5	11,5	15,1	59,9	0,7	0,5	0,3	61,4
2018	20,2	13,4	11,8	15,1	60,4	1,0	0,6	0,3	62,2
2019	19,9	13,3	11,9	12,4	57,5	0,9	0,6	0,3	59,3

La superficie plantada en Chile se ha mantenido en torno a las **13.500** hectáreas los últimos 10 años



¿Cuánto limitará la oferta futura el desarrollo de la ciruela europea para fresco?



Una estimación razonable de crecimiento en la fruta destinada a fresco limita la oferta chilena de ciruela seca a una media de **75 mil** toneladas

Cosecha	miles de hectáreas		toneladas por hectárea	miles de toneladas de producción		
	plantadas	productivas		cosecha	para seco	para fresco
2015	13,3	11,6	7,3	84,7	84,3	0,4
2016	13,4	11,7	7,9	92,0	91,4	0,7
2017	13,5	11,5	8,8	101,2	99,5	1,7
2018	13,4	11,1	8,5	94,3	90,8	3,6
2019	13,3	10,9	8,7	95,1	80,5	14,6
2020	13,2	10,7	7,9	84,6	76,1	8,5
2021E	13,4	11,0	4,8	52,0	44,0	8,0
2022E	13,4	11,2	8,3	92,9	76,9	16,0
2023E	13,4	11,5	8,3	95,1	77,1	18,0
2024E	13,5	11,5	8,3	95,8	73,8	22,0
2025E	13,5	11,6	8,3	96,2	71,2	25,0

Grandes números de la agroindustria de ciruela seca

Chile 2020

76.088

Toneladas secas procesadas



64

Empresas exportadoras

1.189 ton. | exportadora



20

Plantas procesadoras

3.804 ton. | procesadora

California 2019

81.819

Toneladas secas procesadas

22

Empresas exportadoras

3.719 ton. | exportadora

14

Plantas procesadoras

5.844 ton. | procesadora

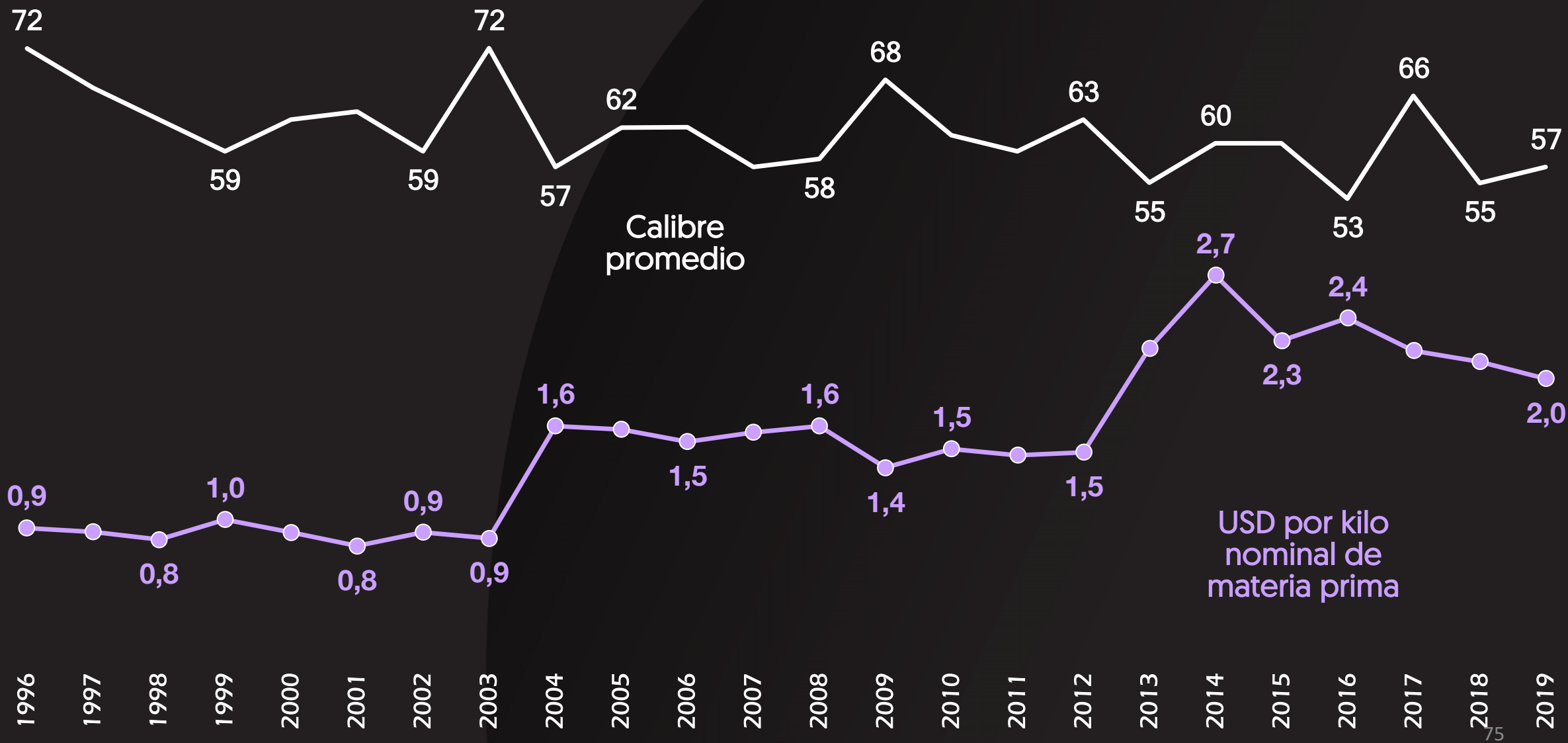
Viviendo la fase de madurez y adaptación de una industria, la contracción coyuntural de la oferta es una oportunidad para la ...

CONCENTRACIÓN Y CONSOLIDACIÓN

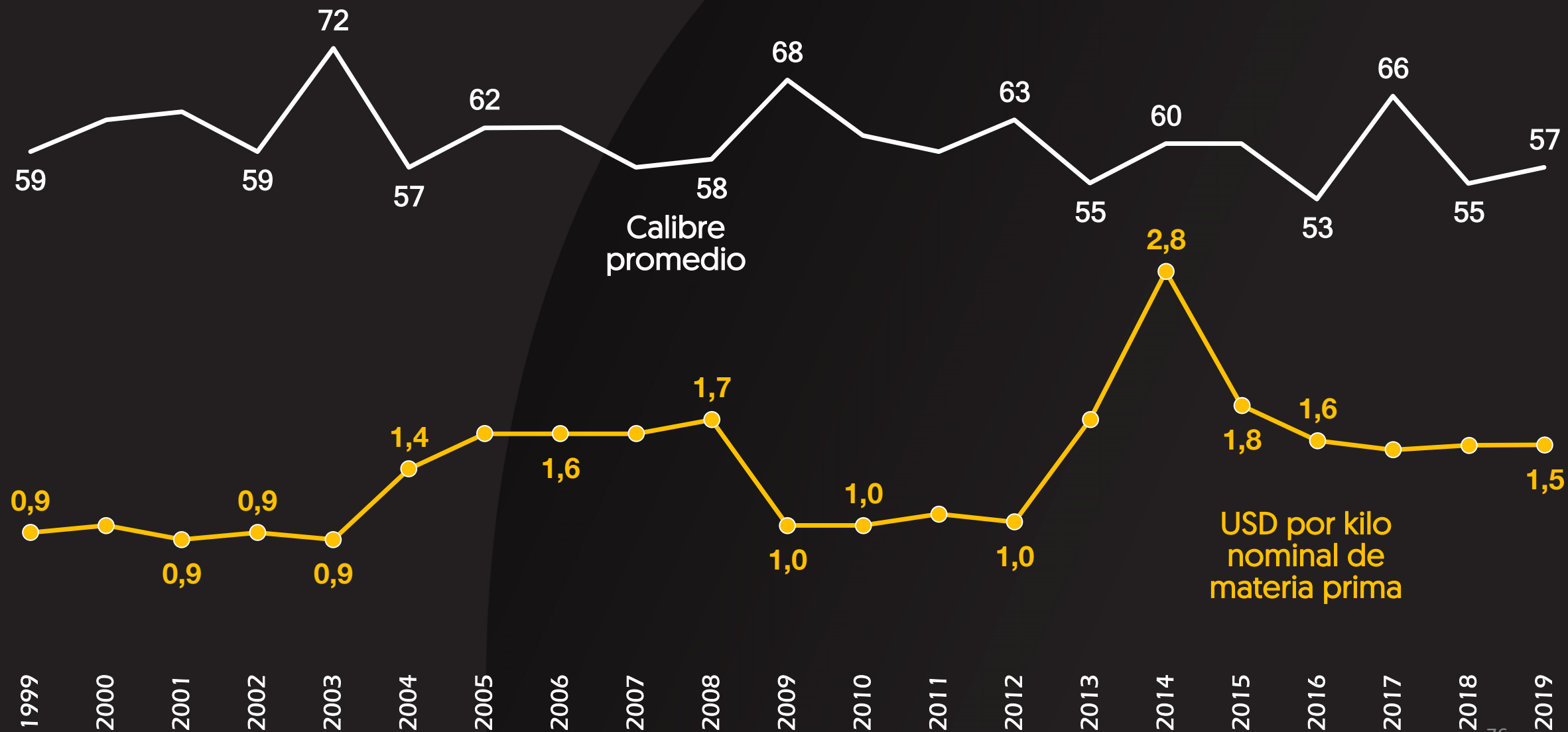
... de sus empresas

¿Qué deudas “pendientes” pueden definir un nuevo ciclo?

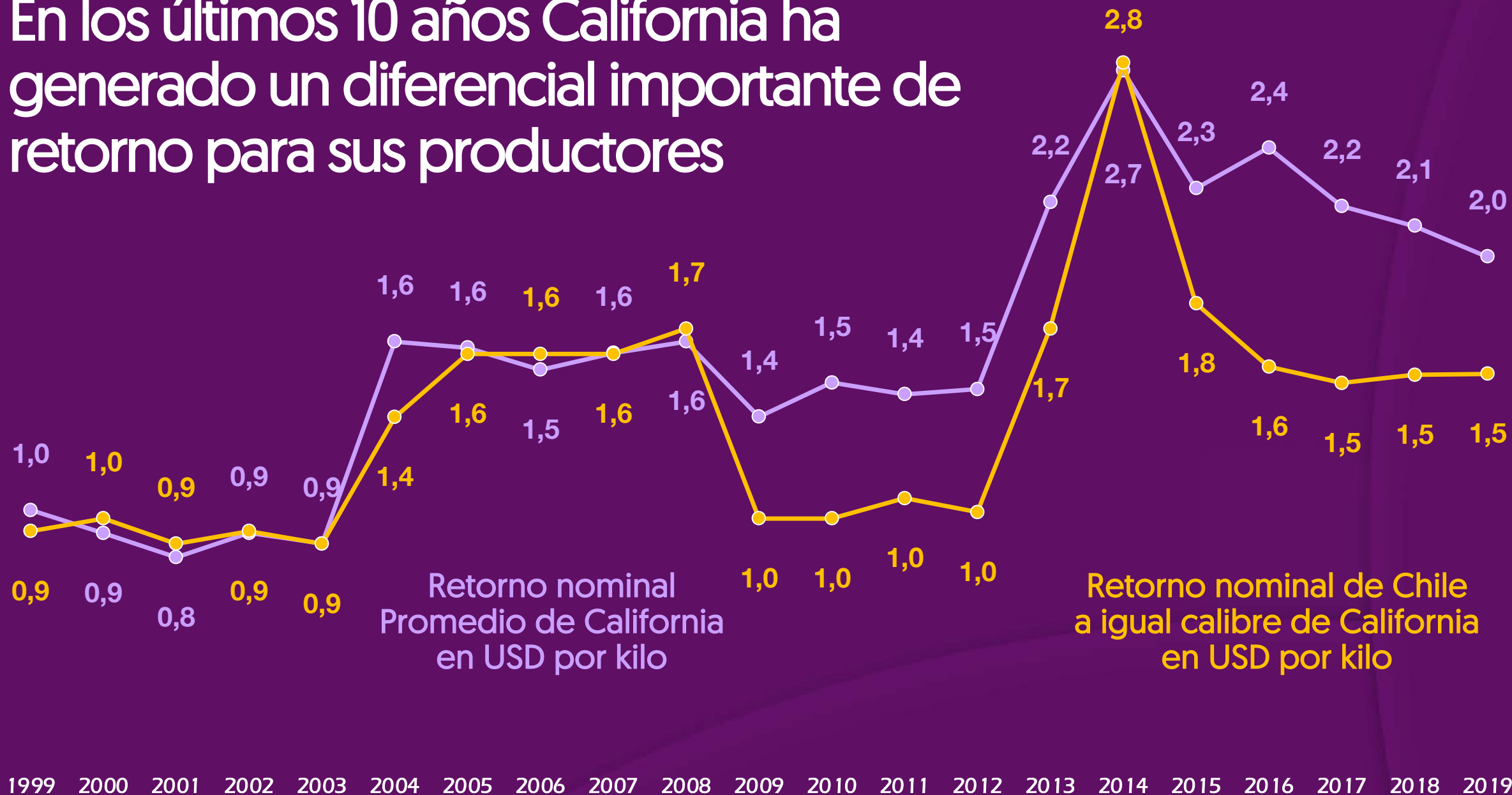
Retorno a productor en California vs. Calibre promedio



Retorno a productor en Chile para calibre medio de California



En los últimos 10 años California ha generado un diferencial importante de retorno para sus productores



Viviendo la fase de madurez y adaptación de una industria, el foco debe estar en la ...

AGREGACIÓN DE VALOR

... de la cadena comercial y productiva, ya sea a través del valor percibido por el consumidor, o de la eficiencia logística y productiva

factores de **demanda** que
pueden definir un nuevo ciclo

Principales mercados de destino en los últimos 10 años

Destino	En miles de toneladas métricas											CAGR%
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Rusia	17,5	30,7	27,1	29,4	32,9	16,4	14,0	12,7	13,8	16,9	14,8	-1,7%
China & Hong Kong	3,6	5,6	7,7	11,4	12,2	6,0	4,4	5,7	8,5	10,6	14,2	+14,7%
Polonia	6,6	6,9	9,8	9,3	9,7	7,3	10,0	7,6	10,2	10,0	11,7	+5,9%
Brasil	13,6	14,3	15,2	15,9	15,0	13,1	9,9	11,8	12,5	12,9	11,7	-1,5%
Alemania	18,4	20,2	18,8	21,5	20,2	18,6	17,3	12,7	13,1	10,9	11,1	-4,9%
México	7,7	9,2	9,5	9,3	10,3	7,7	10,6	8,2	11,3	10,9	10,7	+3,4%
Algeria	10,9	9,4	7,7	11,1	12,6	8,1	8,2	6,8	8,9	4,8	9,9	-1,0%
Italia	10,1	10,7	10,3	10,1	10,9	11,7	10,6	10,0	9,9	8,9	8,9	-1,2%
Reino Unido	7,8	7,8	7,3	8,2	9,0	8,8	8,1	8,5	7,8	8,4	8,1	+0,4%
España	7,9	6,7	6,3	6,2	7,1	7,0	7,6	7,1	7,2	6,4	7,1	-1,1%
Japón	11,2	13,8	13,1	15,1	13,7	12,1	9,7	8,5	6,3	7,0	6,4	-5,4%
Estados Unidos	4,1	0,4	0,4	0,7	1,3	7,1	12,8	19,4	14,7	11,1	2,2	-6,2%
Otros	64,6	70,6	81,8	76,8	89,9	82,4	72,4	74,9	71,7	74,3	71,5	+1,0%
Total mundial	183,9	206,5	215,0	225,0	244,8	206,4	195,7	193,9	195,8	193,1	188,2	+0,2%

Mercados de mayor crecimiento en los últimos 10 años

Destino	En miles de toneladas métricas											CAGR%
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Vietnam	0,0	0,0	0,4	2,1	4,2	4,7	2,7	4,2	4,3	4,1	1,3	+57,4%
Turquía	0,4	0,8	2,0	1,2	1,6	1,2	2,1	2,0	2,0	2,3	2,6	+22,1%
China & Hong Kong	3,6	5,6	7,7	11,4	12,2	6,0	4,4	5,7	8,5	10,6	14,2	+14,7%
República Checa	0,8	1,4	1,3	1,4	2,0	1,4	1,3	1,7	1,7	1,7	1,6	+6,6%
Bangladesh	1,6	0,0	2,6	2,9	6,3	3,0	0,6	1,1	0,9	0,4	3,0	+6,6%
Eslovaquia	0,7	0,9	0,8	1,6	1,5	2,1	1,1	1,5	1,7	1,0	1,4	+6,3%
Egipto	1,4	1,9	1,0	1,5	2,0	1,7	1,7	1,7	0,6	1,9	2,4	+6,0%
Polonia	6,6	6,9	9,8	9,3	9,7	7,3	10,0	7,6	10,2	10,0	11,7	+5,9%
Colombia	1,1	1,1	1,4	1,7	1,4	1,1	1,0	1,2	1,3	1,8	1,7	+4,2%
Corea del Sur	0,9	0,9	1,9	1,8	1,4	1,5	1,0	1,3	1,0	1,4	1,3	+3,4%
México	7,7	9,2	9,5	9,3	10,3	7,7	10,6	8,2	11,3	10,9	10,7	+3,4%
Lituania	1,1	2,1	2,1	2,2	2,5	1,0	1,2	1,5	1,3	1,9	1,2	+1,2%
Otros	158,0	175,5	174,4	178,6	189,6	167,8	158,2	156,3	151,0	144,9	135,1	-1,6%
Total mundial	183,9	206,5	215,0	225,0	244,8	206,4	195,7	193,9	195,8	193,1	188,2	+0,2%

PRUNES D'ENTE J. FAU DE BORDEAUX

La ciruela seca tiene

QUIEREN V^{OS} GOZAR DE BUENA SALUD, TENGAN SIEMPRE SOBRE LA MESA CIRUELAS J. FAU



Desayuno!!

1930

RICA!

*Susan
Hayward*

1950

vitamina A

1980

salud

1990
energía!!

1970

1920

laxante

1960

recetas

vitamina B



... un largo camino hablándole al consumidor ...



Alimentos
“con cuento”



come
sustentable



sustitutos verdes de
carnes y lácteos



verte
bien



buscando
texturas

Donde ...



Lo que ...



Cuando ...



Te haga sentir bien



... que hoy debe seguir caminando ...

... agregando versatilidad a la reconocida funcionalidad de la ciruela seca



Viviendo la fase de madurez y adaptación de una industria, se debe aumentar el valor percibido del consumidor, agregándole a la funcionalidad ...

VERSATILIDAD

... para adaptarse a lo que el consumidor de hoy está buscando en este ... nuevo ciclo.

**8^o CIRUELAS
SECCAS ONLINE**
*A product in a good standing
(Un producto en buen pie)*



FIN

Muchas gracias
por su participación

Chile
prunes
association

ProChile
MINISTERIO DE RELACIONES EXTERIORES

abastible