“From the Chilean Orchard to the Indian Table: The Journey of Chilean Cherries and Kiwis”

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10 Lighthouses for a New Confluence

Source: "LAC-INDIA. América Latina e India. Nuevos Horizontes, Nuevas Esperanzas". CAF, 2021.

Agenda

Indian Consumer

Positioning of the Chilean product

SWOT

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Analysis of the Indian consumer

Source: “Market studies on the positioning of Chilean cherries and kiwis in the Indian market” – Ipsos, 2025

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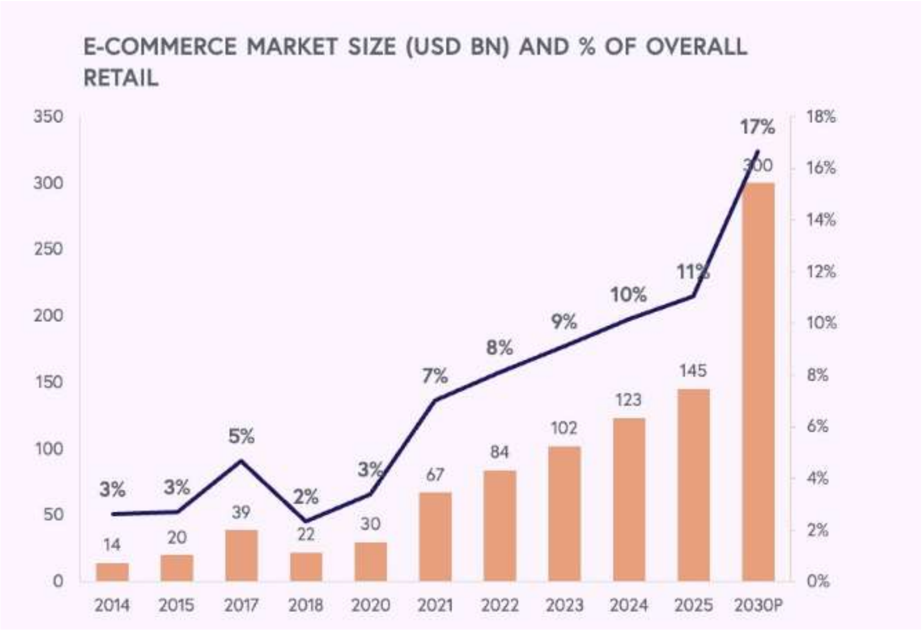
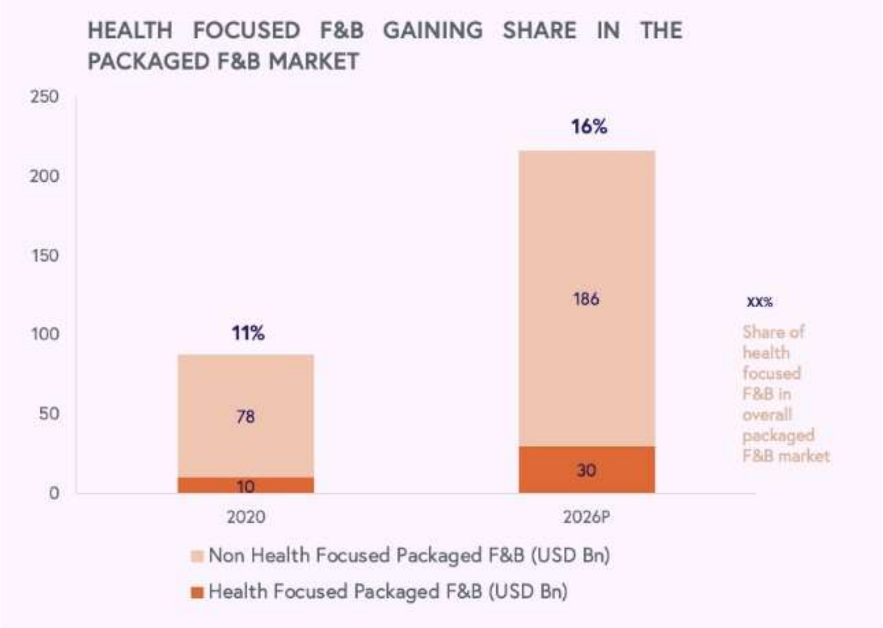
Growth Drivers

- Commerce: fastest and better
- The rise of new lifestyles and consumption habits:
  - Consumers are becoming conscious and discerning about choices
  - Consumers are more conscious on their diet, demanding healthy, nutritive and informative brands





https://www.bvp.com/atlas/click-watch-shop-the-consumer-opportunity-in-india

Who are the consumers of Chilean fruit in India?

- 18–50 years old, responsible for household purchases, in large/medium-sized cities, with higher income levels than the national average
- Strong preference for e- commerce / quick commerce and supermarkets/hypermarkets

Purchase channel	**Part %**
Online / Social / Quick commerce	20%
Supermarket	17%
Hyper / Discount	17%
Fruit shops	14%
Traditional markets	12%
Department Stores	7%
Street vendors	9%
TV Home shopping	4%

- The target consumer is very digital: they search for information online, see KOLs /celebrities and then buy, often on the same digital platform

How is the product consumed?

- Cherries - They are mostly bought for family gatherings, premium daily snacking and fruit salads; in gifting, gifts between families and on holidays predominate.
- Kiwis - Consumption has shifted towards breakfast at home and snacking, including preserved fruit formats.

Opportunities and barriers to consumption

- Opportunities - Product first: quality, flavor, freshness and health benefits are the basis of the decision, both in cherries and kiwi.
- Challenges – Price and accessibility are the main obstacles for kiwifruit. For cherries, “price ”, “ inadequate packaging/size” and “logistics” are also emerging as challenges.

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Profile and positioning of each product

Source: “Market studies on the positioning of Chilean cherries and kiwis in the Indian market” – Ipsos, 2025

Cherries

Chile is perceived as having strong "better climatic conditions for cherry production".

Kiwis

Chile shows " average " image performance , with room for improvement key features (health , quality , flavor)

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SWOT analysis for Chilean fruit in India

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Source: “Market studies on the positioning of Chilean cherries and kiwis in the Indian market” – Ipsos, 2025

SWOT analysis of Chilean fruit in India

Strengths

- Good reputation of Chilean origin
- Premium fruits with high use in " gifting ", family, breakfast and snacking.
- High affinity of young urban consumers (25–40 years old) and digital channels.

Opportunities

- Expansion of “gifting”
- Develop differentiating messages: Health/Vit C (kiwi), Origin/Freshness (cherries).
- Take advantage of e- commerce and quick commerce for storytelling and conversion.

Weaknesses

- Perception of high price and lower purchase frequency.
- Packaging /format issues and limited offline visibility.
- Chile Brand & Frutas de Chile has not yet positioned itself as a sectoral brand in the market
- Logistics & Cold Chain

Threats

- Competition from other suppliers in the Southern Hemisphere (FTA)
- Price sensitivity that slows consumption
- Regulatory or health risks in importing

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Strategic Conclusions

Strategic Conclusions

- **What we have in common?**
  - Iconic mountain ranges that define our landscapes, cultures, and economies, influencing life, providing natural barriers, supporting unique ecosystems, and shaping trade/identity, connecting people through nature despite being geographically distant
- **Opportunities**
  - India's fruit market: US$125.1 billion in 2025 and expected to grow by 6,6% (CAGR) in the next 5 years.
  - Imported fruits: 14% of the market (coming from the Middle East, Chile, Australia, New Zealand and Africa).
  - Most popular: Apples, kiwifruit, avocados, cherries, dates, figs.
  - Growth drivers: Rising income, urbanisation and health awareness
- **What we want?**
  - A relationship that goes beyond the exchange of products, a deeper relationship that allows us to better face global ups and downs

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Chilean fruit enjoys a favorable position in India, with real and sustainable growth.

This position can be further strengthened in the future by expanding its narrative of health, premium product status, and origin; optimizing the product experience; and amplifying its digital presence and, in some cases, its gifting opportunities.

The challenge is no longer simply "entering the market," but rather building a national brand and value platform that will allow for expansion in volume, category, and other Chilean products in the coming years.

Thank you