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Organic Products Report

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Organic Products

Approved By:

Rachel Bickford, Agricultural Attaché

Prepared By:

María José Herrera M., Marketing Specialist

Report Highlights:

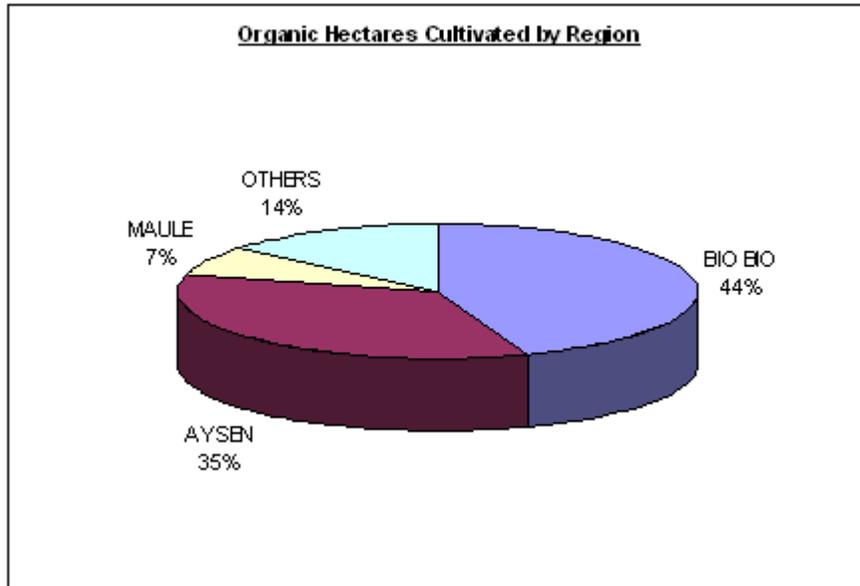
While there are no official market estimates, the AAOCH (Chilean Organic Agriculture Association – Agrupación de Agricultura Orgánica de Chile) estimates that the organic market in Chile moves approximately USD\$35 million worth of products annually. This estimate includes about USD\$2.4 million of local consumption, with the remainder representing exports. Imports of organic products, by comparison, are very small. The overall size of the organic sector (local consumption, production, and export) has been growing steadily accompanied by increased diversity in distribution channels, the Organic Agriculture Law that was passed in 2007, and the National Certification System of Organic Products.

Though the market is relatively small, demand for organic products is growing 20% annually, despite the fact that organic products can be 25% more expensive than their conventional alternatives.

General Information:

Section I. Market Overview.

- The most sought after organic products in the Chilean market include fruits and vegetables, flour, sugar, oils, wine and meat.
- Chilean production of organic products is gaining momentum with apples, blueberries, onions, raspberries, blackberries, avocados, olives, rosehip and wine. Organic exports are dominated by processed products and fresh fruit.
- Exports of processed organic products reached 3,257 tons during 2008-2009, including apples, (dehydrated, pulp, dry and juice), frozen raspberries (primarily sent to North America), and 447,781 liters of organic wine (primarily shipped to Europe).
- Regarding organic fresh fruit, 2008-2009 exports amounted to 14,587 tons, 50% of which were apples, followed by blueberries (24.5%), kiwis (11.7%) and avocados (5.4%). The main destination was Europe (55%).
- According to the National Statistics Institute (INE), as of 2009 over 2,000 farmers declared to be working in or developing organic agriculture projects, and according to ProChile, the Government's export promotion arm, there are over 100 companies exporting organic products from Chile to mainly the U.S., Canada, Europe, South Korea and Japan.
- Even though there are no official numbers in the market, the AAOCH (Chilean Organic Agriculture Association – Agrupación de Agricultura Orgánica de Chile) estimates that the organic market in Chile moves approximately USD\$35 millions annually. This estimate includes about USD\$2.4 millions of local consumption, with the remainder representing exports. Imports of organic products, by comparison, are very small. The overall size of the organic sector (local consumption, production, and export) has been growing steadily accompanied by increased diversity in distribution channels, the Organic Agriculture Law that was passed in 2007, and the National Certification System of Organic Products.
- Though the market is still small, demand for organic products is growing 20% annually, despite the fact that organic products can be 25% more expensive than their conventional alternatives.
- According to SAG's statistics (the Government's Agriculture and Livestock Service) in 2008-2009, 175,760 hectares were certified as organic in Chile.



Source: SAG 2009

The following HTS codes represent products identified by AAOCH as the most prevalent categories of organic products imported into Chile. However, no firm Custom's statistics exist for imported organic products since the word "organic" is only casually used in the description fields of the import records.

HTS Code	Description
04031010	Yoghurt, within access commitment
04031020	Yoghurt, over access commitment
07019000	Potatoes, except seed
07093000	Eggplants
07096090	Peppers of the genus Capsicum or Pimenta
07097000	Spinach in packages not exceeding 1 kg each
08030000	Bananas
08043000	Pineapples
08051000	Oranges
08054000	Grapefruit
08071100	Watermelon
08072000	Papayas
08081010	Apples
08104010	Blueberries, cultivated
09011100	Coffee, not roasted, not decaffeinated
09022000	Green Tea
09121000	Coffee, roasted, not decaffeinated
12119010	Herbal Tea
15091000	Oil
21032090	Tomato Sauces

Source: Chilean Custom's Statistics and AAOCH

From this list, Custom’s information only identified certain importations of tomato sauce as being specifically organic (amounting to USD 27,527 CIF in 2009, all from the U.S.).

Advantages	Challenges
Chile’s organic local market is lacking: milk and dairy, flour, bakery products, meat, cured meats, cereals, sugar.	Organic products most exported: wine, apples, kiwis, berries, honey, olive oil, medicinal herbs, and rosehip.
The depreciation of the U.S. dollar against the Chilean peso makes U.S. products cheaper for Chilean consumers.	Imports from Asia and South American countries have usually lower prices, which makes them very attractive to Chileans.
The majority of importers have their main office in Santiago or the surrounding Metropolitan Region, and many act as local distributors for foreign products. A good local distributor will have an aggressive sales force with national coverage.	Shipping expenses and delivery times and minimum order quantities (especially by boat) can be onerous. Imports from neighboring countries have an advantage here.
Imported products compensate for seasonal drops in local production and ensuing price hikes.	Finding a good, reliable distributor is not easy. To gain an advantage, ensure that the distributor complies with your quality, customer service and delivery standards.
The Chilean Government predicts between 4.5 and 5.5 percent growth in GDP for 2010.	Chile has Free Trade Agreements with the NAFTA countries, Mercosur, the European Union, many Latin American countries, South Korea and China; as such, U.S. products face stiff price competition.

Section II. Market Sector Opportunities and Threats.

The most important opportunities for U.S. organic producers that would like to export their products to Chile are with those product categories in which Chile has no organic production:

- A. Milk and Dairy
- B. Flour
- C. Bakery
- D. Meat
- E. Cured Meat
- F. Cereals
- G. Sugar

A. Milk and Dairy.

Local production of organic milk and dairy is in the beginning stages. This is comprised primarily of small family-run companies that produce small quantities of organic yogurt, cheese, and ricotta.

Currently Chile is importing very small quantities of organic yogurt, mainly with cereal and fruits. Total imports of this product category reached USD 18,724 in 2009, almost exclusively from Argentina.

Organic milk and other dairy products are a new developing market.

B. Flour.

The Chilean Agriculture Ministry has been researching the possibility of producing organic flour in Chile and it is trying to promote the activity helping 54 small farmers from Paredones, Pichilemu and Pumanque, in the country's VI Region of O'Higgins (just south of Santiago), to produce and export organic quinoa flour.

Cooperativa Las Nieves, from this same Region, is also currently producing some small quantities for some organic stores in Santiago.

The Agriculture Ministry is also helping farmers to develop organic chestnut flour. Total production is expected to reach 300 tons of chestnuts in 2010. Currently no imports exist.

C. Bakery.

There exists a small somewhat informal production of organic bakery items in Chile, but the supermarket chains do not currently offer these product lines.

D. Meat.

Chile is experimenting in this field. In August, 2010, the first exportation of organic meat was sent to Germany. But in order to feed the animals the producers had to import organic grass concentrate because there is no production of that in Chile. Governmental entities are trying to incentivize the production for exporting, but not for local consumption. The country has 1,395 hectares certificated for producing organic meat.

E. Cured Meat.

In Chile the production of non organic cured meat during 2009 reached 228,659,806 kg. Organic cured meat production in Chile does not exist, and neither do imports. It is a virgin market to develop.

F. Cereals.

In Chile there are 125 hectares of organic certificated land for cereal cultivation. Of them, 48 ha are for quinoa (38%), 47 ha for barley (38%), oats (23%), and wheat (1%). Organic oat and wheat demand is growing by end consumers in Chile and there is little offer in the market.

According to a study performed by AAOCH, bread and cereals represent 10% of organic exports from the U.S. to the world.

G. Sugar.

Chile is one of the main importers of sugar in Latin America per capita. In 2010 Chile will increase its sugar imports despite the increase in prices.

Chile's productive capacity would not be able to cope with local demand for sugar, and the World Trade Organization (WTO) suggested the country should lower the band tariff regime for wheat, flour and sugar imports.

Nevertheless, Paraguay would represent an important competitor since it is the main organic sugar exporter in the region with annual production of approximately 180,000 tons.

1. Entry Strategy

For all those products that shows an opportunity for U.S. exporters, the following recommendations are applicable:

- Establishing local or regional operations or joint ventures can be a reasonable way to become a player in South American markets like Chile. Lower-cost supply of competing products from neighboring markets represent a threat, as cost is a fundamental factor, and an inability to compete on a price basis may be compensated by the possibility to establish production facilities in Chile or in neighboring countries.
- The main opportunities lie with products that guarantee a level of quality control, product uniformity, and reliability not always available in local products. Part of this is the development of improved distribution service quality levels.
- Chileans are becoming more familiar with foreign products, and promotion of U.S. products is the key for successful market entry and development.
- There is a perceived prestige for European products, thus Chilean buyers must be courted with an image of U.S. products that compares favorably with their European competitors that already have higher visibility. Suppliers should highlight the traditional strengths for which the U.S. is recognized, emphasizing quality control, uniformity, reliability, and innovation.
- Organic and natural products serve as a particularly attractive import from the U.S., given that the market is growing as Chileans become more health-conscious.

Main Organic Distribution Channels and Companies (AAOCH database):

- **Communal Agriculture:**
- Ecoescuela El Manzano (www.ecoescuela.cl)
- **Exporters**
- Agr. Valle Quilimarí (www.vallequilimari.cl)
- Agrícola Hortifrut Ltda. (www.hortifrut.cl)
- Agrícola y Forestal El Manzano (www.ecoescuela.cl)
- Agronica CHILE Héctor Rojas H.

<http://www4.biblioredes.cl/BiblioRed/Nosotros+en+Internet/agriculturaorganica/Agronica.htm>

- Emporio Nacional (www.emporionacional.cl)
- Gabriel Coloma M. (gcoloma@gmail.com)
- Huertos Orgánicos de Chile S.A. (www.huertosorganicosdechile.cl)
- Maule Orgánico SA (www.mauleorganico.com)
- Valle Grande S.A. (www.siemel.cl/siemel/empresas_valle_grande.php)
- Viña Casa Silva S.A. (www.casasilva.cl)
- **Markets**
- Agrícola y Forestal El Manzano (www.ecoescuela.cl)

- Centro de Acopio Agropecuario El Monte (www.caam.cl)
 - Consultora Ecoescuela El Manzano (www.ecoescuela.cl)
 - Huertorganic (www.huertorganic.cl)
 - Viña Casa Silva S.A (www.casasilva.cl)
- **Wholesalers**
 - Emporio Nacional (www.emporionacional.cl)
 - Viña Casa Silva S.A. (www.casasilva.cl)
- **Supermarket Providers**
 - Agrícola Hortifrut Ltda. (www.hortifrut.cl)
 - Huertorganic (www.huertorganic.cl)
 - Huertos Orgánicos de Chile S.A. (www.huertosorganicosdechile.cl)
 - Simon Laurin O. (Surorganico) (www.surorganico.com)
 - Valle Grande S.A. (www.siemel.cl/siemel/empresas_valle_grande.php)
 - Viña Casa Silva S.A. (www.casasilva.cl)
- **Specialized Stores**
 - Andrea Tuzek (www.ricoysano.cl/tienda)
 - Valle Grande S.A. (www.siemel.cl/siemel/empresas_valle_grande.php)
 - Viña Casa Silva S.A. (www.casasilva.cl)
- **Direct Sales**
 - Agr. Valle Quilimarí (www.vallequilimari.cl)
 - Agrícola Hortifrut Ltda. (www.hortifrut.cl)
 - Andrea Tuzek (www.ricoysano.cl/tienda)
 - Bd Max (www.bdmax.co.nz)
 - Centro de Acopio Agropecuario El Monte (www.caam.cl)
 - El Torreon Export Ltda. (www.eltorreon.cl)
 - Emporio Nacional (www.emporionacional.cl)
 - Huertorganic (www.huertorganic.cl)
 - Proyecto Diseño (www.proyectodiseno.cl)
 - Simon Laurin O. (Surorganico) (www.surorganico.com)
 - Valle Grande S.A. (www.siemel.cl/siemel/empresas_valle_grande.php)
 - Viña Casa Silva S.A. (www.casasilva.cl)
- **Internet Sales**
 - Agrowall E.I.R.L (www.agrowall.com)
 - Control Best Ltda. (www.controlbest.cl)
 - Proyecto Diseño (www.proyectodiseno.cl)
 - Viña Casa Silva S.A. (www.casasilva.cl)
- **Supermarkets**
 - Jumbo (www.jumbo.cl)
 - Lider (Wall Mart Chile) (www.lider.cl)
 - Unimarc (www.unimarc.cl)

- Supermercados Tottus (www.tottus.cl)
- Santa Isabel (www.santaisabel.cl) (same owners as Jumbo)

Note that this list only includes information informed by AAOCH, which includes companies associated in some way with the organization and does not necessarily represent the whole market. Viña Casa Silva, for example, is not the only winery focused on organic production. Other established organic wineries include:

Wineries with Organic Production	
Viña AguaTierra	Viña Ventisquero
Viña Domaine	Viña Casa
Raab Ramsay	Lapostolle
Viña Matetic	Viña Cono Sur
Vineyards	Viña Chateau
Viña Quintay	Los Boldos
Ecovineyards	Viña Errázuriz
Viña Agrícola	Viña Montgras
Portales	Viña San Pedro
Viña Antiyal	Sociedad Vinícola Miguel Torres, S.A.
Viña Canepa	Viñedos y Bodegas Corpora S.A.
Viña Carmen	Viña Viu Manent
Viña Cousiño Macul	Viña Carta
Viña Chacarero	Vieja
Viña Huelquén	Viña Chequén
Viña Pargua	Viña La Fortuna
Viña Santa	Viña Lomas de Cauquenes
Inés de Martino	Viña Rio Bonito
Viña Tarapacá	Viña Männle
Viña Undurraga	Viñedos Orgánicos Emiliana

Source: Odepa (Research and Agriculture Policies Office of the Agriculture Ministry of Chile)

Other Stores:

La Chakra, ApioPalta, Fen Orgánico, Emporio La Rosa, El Huerto, Tierra Viva, Cardamomo, Organic Delivery, Super Natural, El Huerto, Organic & Natural Market, Rincón Natural, Almacén del Comer Sano, Tienda Natural.

According to AAOCH, 60% of all organics product's sales occur at supermarkets. Nevertheless, supply is an issue since in order to be able to import organic products, they should be certificated as per Chilean law and have to be guaranteed by a certifying institution registered at SAG (Agriculture and Livestock Service), which makes the process slow.

2. Market Size, Structure, Trends.

The organic food market has been steadily growing over the past eight years.

Chile's internal demand for organic products is increasing by 20 per cent every year, with consumers currently purchasing USD 200,000 of organic products per month, or about USD\$2.4 millions per year.

According to AAOCH, the total market, which today represents USD\$35 millions in sales, is expected to grow to USD\$53 millions by 2013. These estimates are dominated by exports, which account for about 90% of local production. Imports of organic products are relatively small.

Sector Trends.

Chile has multi-cultural diversity with large foreign communities such as British, German, Spanish, and Italian, which makes the Chilean's taste and consumption patterns of imported food products from Europe and the U.S. highly attractive and accepted.

With per capita GDP of USD 14,600 per year, a growing middle class of 40 percent of the population, a small but well educated upper middle class, and a general increase in interest in healthy food, of which organic products form a part, it is reasonable to expect continued growth in the potential market for organic products.

Sixty percent of the Chilean population lives in Santiago, and they represent the most valuable consumer target for imported or high-value food products.

About 10-15 per cent of products sold in supermarkets are imported.

The US-Chile FTA signed in 2004 prompted new interest in U.S. products and opened new opportunities for previously prohibited products, such as red meat, certain fresh fruits, and dairy products.

Consumer Demand and Preferences.

According to AC Nielsen, Chileans give important credit to brands (excluding private labels) and also choose supermarkets because they offer more items that are practical, have larger formats, and offer healthier products.

In surveys, consumers declare that the most valued benefit from specific products are:

- health
- quality
- convenience
- security

Convenience is the main trend in packaged food. More women are working, so they have less time to spend on meal preparation, and schools are extending the school day. Chilean consumers have increasingly felt pressed for time to cook and more people are eating out and, as a result, they are turning to alternatives like snacking on the go, takeaway food and ready meals, instead of cooking.

Manufacturers in more mature sectors such as pasta and oils have launched value-added products in order to develop new market niches.

Leading hypermarkets chains (Lider (WallMart), Jumbo (Cencosud) and Unimarc) compete for the best international gourmet sections at their stores, with dedicated sections at the shelf and activities (PR and marketing included) destined to attract high-end segments of consumers.

Chilean consumers generally steer clear of spicy ethnic foods. According to specialists from Cencosud (owners of the Jumbo and Santa Isabel supermarket chains) the following foreign food imports are in highest demand:

Snack foods, healthy snacks, energy products, specialty drinks, cookies, tuna, dietetic snacks and candies, baked goods and mixes, sweets, gums and chocolates

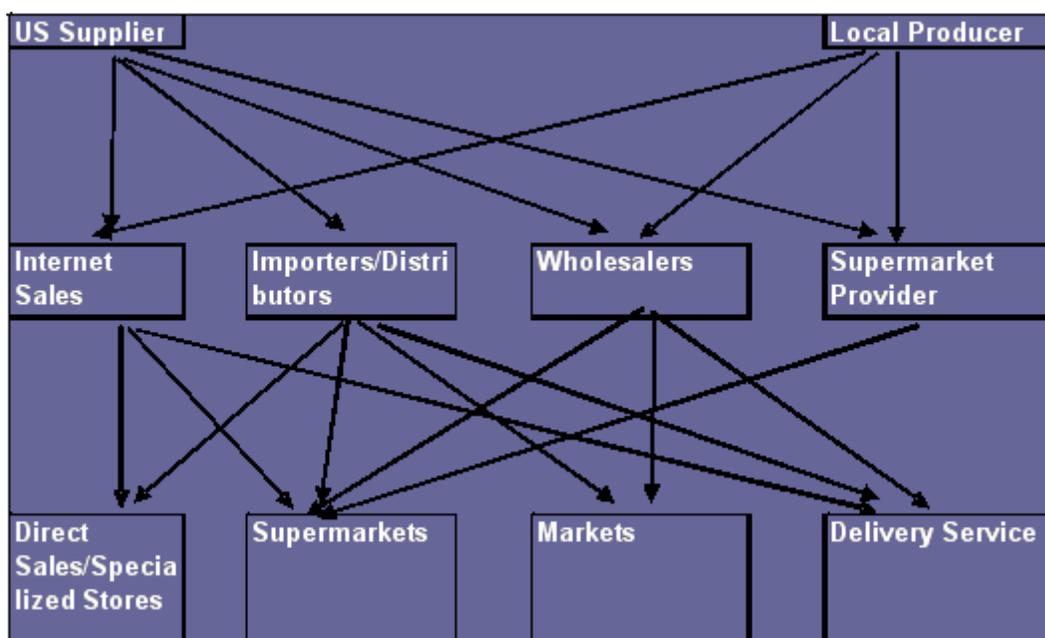
While the items listed above are not restricted to just organic products, organic products are being adopted at a fast rate, and their increasing presence in the market is marking a trend. Nevertheless, local demand for organic products is still relatively small as consumers do not consider the extra cost of these products as a convenient alternative.

Organic production in Chile is primarily an export driven activity concentrated in the fruit, vegetable and wine industries for most part.

Opportunities.

- Specialty products have a better chance of success than more basic products, which are often sourced locally or from neighboring Latin American countries; however products from the U.S. must have competitive pricing compared to products from Europe. For example, high U.S. market shares are linked mainly to a product's uniqueness (eg. peanut butter, baked beans, etc.) or special characteristics (above-average quality or quality consistency especially with respect to human health).
- Value added or differentiated products – snack food, health and diet products, healthy snacks and fruit bars.
- Some niches like celiac food products have been under development in the last couple of years, both at supermarkets and drugstore chains.
- Organic beer, breakfast breads, cakes, crackers (including rice).

Distribution Channel Flow Diagram



3. Company Profiles

Organic Companies			
Company Name	Location	Type of food	Purchasing Agents
Apio Palta	Santiago	Fruits, vegetables, organic cosmetics, and herbs among others.	Third-party distributor
Tierra Viva	Santiago	Fruits, vegetables, dairy, bakery and herbs	Producer, Third-party distributor and Association
Comercial Greenic S.A (Viconto and Huertos orgánicos)	Center and South Chile	Fruits	Exporter and producer
Agrícola y Forestal El Manzano	Bio Bio Region	Organic production	Education (they teach how to produce organic products).
Viña Casa Silva S.A.	Hijuelas and Santiago	Wine	Producer, Third-party distributor and Exporter
Ecoferia La Reina	Santiago	Clothing, Diapers, fruits, vegetables, etc	Market. Third-party distributor
La Chakra: Tienda	Santiago	Clothing, Diapers, fruits, vegetables, etc	Store and Restaurant. Third party distributor

Section III. Costs and Prices.

Organic product prices are in general about 25% more expensive than conventional alternatives.

To see conventional prices of different agricultural products please visit:

http://www.odepa.gob.cl/jsp/menu/precios/precios_rubros.jsp;jsessionid=6B582B293C96F064AB68EF2B86EE3EBF?rubro=cereales

Chile ratified a Free Trade Agreement (FTA) with the U.S., which came into effect on January 1st, 2004:

- The FTA immediately eliminated tariffs on almost 90 percent of U.S. products imported into

Chile and more than 95 percent of Chilean exports to the U.S. Tariffs on all products will be eliminated within 12 years.

- Elimination of Chile's six percent general tariff has made U.S. products significantly more competitive, as they had been losing ground to other countries with which Chile already had preferential trade agreements (mainly Argentina, Brazil, Canada, and Mexico).

Benefits of the FTA for the agricultural sector:

- Since 2009, approximately 75 percent of both U.S. and Chilean farm goods are tariff-free, with all tariffs and quotas phased out within 12 years.
- U.S. access to this market is competitive with Canada and the European Union, both of which already had FTAs with Chile.

Although the FTA allows immediate duty-free entry into Chile for the majority of U.S. goods, Chile's two free trade zones still offer some advantages: (Region I) Free Trade Zone of Iquique in the north and (Region XII) Free Trade Zone of Punta Arenas in the extreme south. Modern facilities for packaging, manufacturing, and exporting exist in each zone, and the latter has a free port. Imports entering and remaining in the Free Trade Zones pay no value-added tax (VAT).

Alcoholic Beverages

Although the FTA has eliminated the majority of tariffs on U.S. exports into Chile, certain luxury goods incur additional taxes:

- Beer, cider, wine, champagne: 15%
- Grape pisco (distilled wine), whisky, aguardiente, liquorice wines: 27%

Products That Face Significant Barriers:

- Although Chile has a general policy of free-market prices, there are some exceptions. Major agricultural products such as wheat, sugar, and sugar-containing products fall under a price-band system which encourages local production.
- These price bands change with fluctuations in international market prices and are typically announced mid-year to help the local agricultural industry determine what to sow.

Section IV. Market Access.

Imported organic products can be sold in the Chilean market only when they come from a country with a regulatory authority that provides certification that the products were produced under an organic treatment or production method equivalent to the one established in the Chilean Official Technical Rules and Norms related to organic products.

The Agriculture and Livestock Service (SAG) in Chile will approve or refuse this certification according to Chile's own system of organic product certification. The SAG must be assured that the organic production is similar to the technical requirements established in the Chilean legislation and the certification of the imported product must be overseen by the appropriate authority in the country of origin.

SAG might request all needed information to collect data to prove that the organic production is similar to the accepted methods in Chile.

The importer should allow the SAG inspect the product and its certifications. For more information about certification of organic products please visit:

[http://www.sag.gob.cl/opensdocs/asp/pagDefault.asp?boton=Doc54&argInstanciaId=54&argCarpetaId=1305&argTreeNodosAbiertos=\(1416\)\(-54\)&argTreeNodoActual=1305&argTreeNodoSel=1305](http://www.sag.gob.cl/opensdocs/asp/pagDefault.asp?boton=Doc54&argInstanciaId=54&argCarpetaId=1305&argTreeNodosAbiertos=(1416)(-54)&argTreeNodoActual=1305&argTreeNodoSel=1305)

[http://www.sag.gob.cl/opensdocs/asp/pagDefault.asp?boton=Doc56&argInstanciaId=56&argCarpetaId=1798&argTreeNodosAbiertos=\(1798\)\(-56\)&argTreeNodoSel=-1&argTreeNodoActual=1798](http://www.sag.gob.cl/opensdocs/asp/pagDefault.asp?boton=Doc56&argInstanciaId=56&argCarpetaId=1798&argTreeNodosAbiertos=(1798)(-56)&argTreeNodoSel=-1&argTreeNodoActual=1798)

Labeling and Marking Requirements

All processed food must be tested and found in compliance with government health regulations, and the Chilean Health Services officer at the port of entry approves the import of processed food products on a case-by-case basis. There is no blanket approval process for permitting identical products into the country. Meeting the labeling and fortification standards can be cumbersome, which raises the overhead cost of introducing new products into the Chilean market.

Imported products intended for public consumption must specify the country of origin and be labeled in Spanish. All canned or packaged food products must display the quality, purity, ingredients or mixtures (including additives), net weight in the metric system, manufacturing and expiration dates, nutritional facts (since 2006) and the name of the producer or importer. Labeling and fortification standards often differ from those in the U.S. and some U.S. processed foods must be labeled and/or formulated especially for Chile. Goods not complying with the requirements may be imported but not sold until the conversion is made.

For more information about general labeling provisions, please visit the following websites:

- Chilean Health Ministry

http://www.redsalud.gov.cl/portal/url/page/minsalcl/g_proteccion/g_alimentos/reglamento_sanitario_alimentos.html

- U.S. Embassy, Santiago (Food & Agriculture section)

www.usembassy.cl

Section V. KEY Contacts and Further Information.

AAOCH - Chilean Organic Agriculture Association (Agrupación de Agricultura Orgánica Chile)

Address: Avda. Luis Pasteur 5280, Of. 13, Vitacura, Santiago, Chile

Tel.: (56-9) 796-86642

Email: ligio@aaoch.cl

Web Page: www.aaoch.cl

SAG (Agriculture and Livestock Service)

Address: Av. Presidente Bulnes 140, Santiago, Chile
Phone: (56-2) 345-1111
Fax: 600-818-1724
Web Page: www.sag.cl

ODEPA (Office of Agricultural Studies and Planning)

Address: Teatinos 40: Piso 8 Santiago de Chile
Phone: :(56-2) 397-3000
Fax: (56-2) 397-3044
Web Page: www.odepa.cl

Office of Agricultural Affairs

Mailing Address:
FAS/USDA
3460 Santiago Pl.
Washington D.C.
20521 / 3460

Street Address:
Office of Agricultural Affairs
U.S. Embassy, Santiago
Av. Andres Bello 2800 – Las Condes
Santiago, Chile

Tel.: (56 2) 330-3704
Fax: (56 2) 330-3203
E-mail: agsantiago@fas.usda.gov

Websites:

<http://www.usdachile.cl>; Office of Agricultural Affairs homepage. <http://www.fas.usda.gov>; Foreign Agricultural Service homepage.