

represents 18% of that total. The importance of Chilean grape exports in final markets is very significant. In the U.S., around 90% of total off-season imports come from Chile, and this represents wholly 30% of total consumption. The share of Chilean grapes in European consumption is not as large as in the U.S., but is also quite substantial. Other important fruit exports from Chile are peaches, nectarines, apples and plums; in these products, however, Chile's share of the main consumer markets is low.

### **Vegetables**

Vegetable production, especially that oriented to the internal market, is mainly done by small farmers. Larger producers, however, have also entered the market, centering in exports and in the provision of inputs to agroindustry. This has induced an increase in the export share of the sector, from 10% in 1980 to over 20% in recent years.

Asparagus is an important new product in this sector, due to its potential for exports. The principal market for fresh asparagus is the United States, with a share of over 75% in total exports of this product. The United States, however, represents only a minor share in Chile's exports of processed asparagus, which is partly explained by the high tariffs faced by this product. This practice of placing higher tariffs on products with higher value added is a common feature of the main industrial markets (Europe, Japan, and the U.S.).

### **14.2 The agroindustrial sector**

Agroindustry has experienced considerable growth since the second half of the 1980s. This development has come together with a major expansion in the installed capacity to process fruits and vegetables. Dehydrating plants increased from 19 in 1986 to 30 in 1990, cold storage facilities rose from 13 to 32, tomato concentrate plants from 5 to 10, and fruit concentrate installations from 6 to 11 during the same period. Overall, exports of processed vegetables and fruits have come to represent 18% of