

# 13 | EXPO ciruelas secas

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SEBASTIÁN VALDÉS

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# EVOLUCIÓN FRUTÍCOLA

En modelos agronómicos  
de frutales



**CIRUELOS**



**OLIVOS**



**ALMENDROS**



# OFERTA MUNDIAL EN TONELADAS

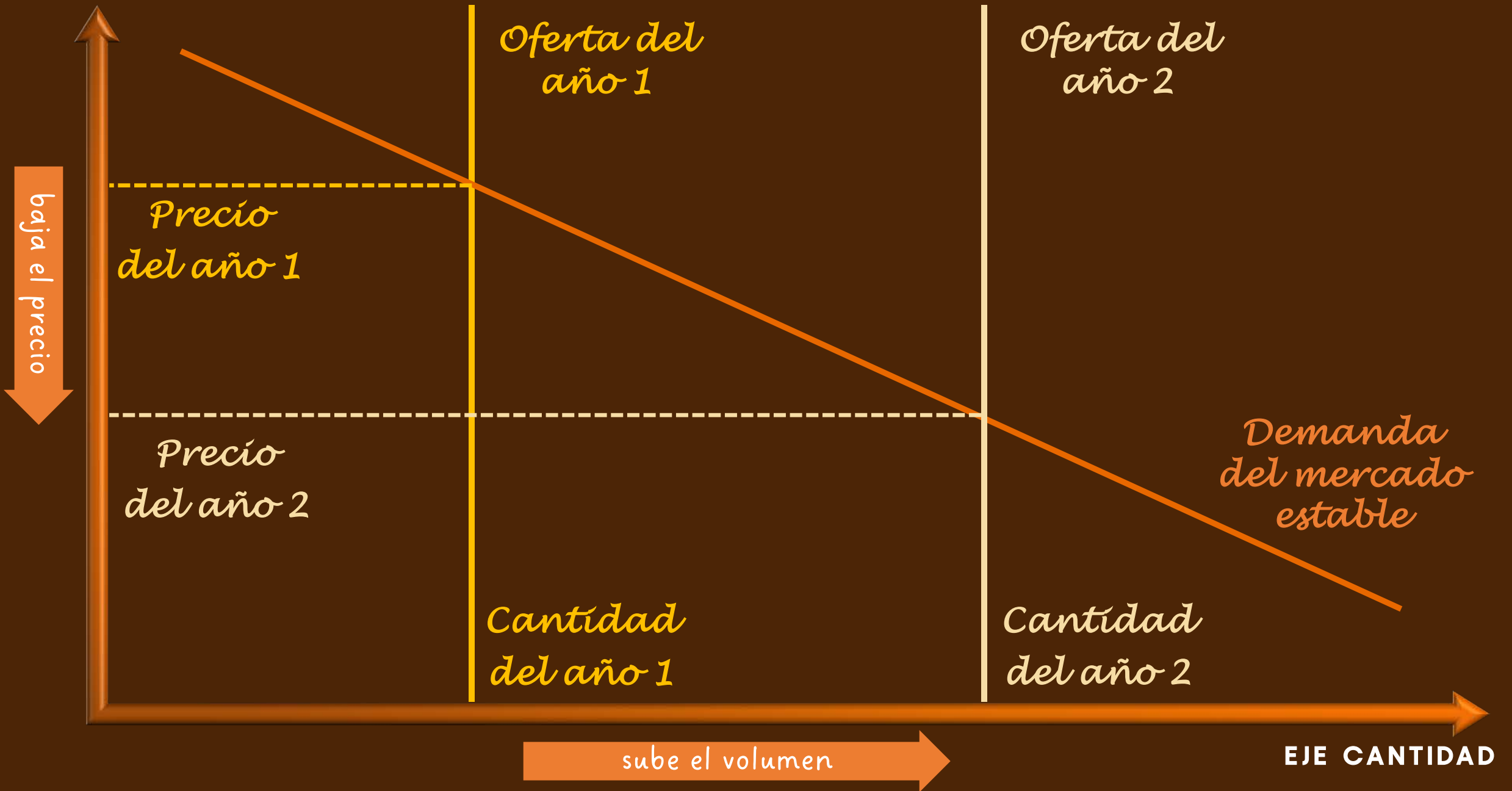
<b>Cosecha</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
<b>Chile</b>	58.782	82.701	86.086	87.096	99.421
<b>California</b>	75.841	63.412	86.908	70.851	59.000
<b>Francia</b>	17.000	17.000	40.000	29.000	29.000
<b>Argentina</b>	20.190	11.288	19.702	34.962	20.000
<b>Subtotal BIG4</b>	<b>171.813</b>	<b>174.402</b>	<b>232.696</b>	<b>221.909</b>	<b>207.421</b>
<b>Jiashi (China)</b>	4.150	7.500	10.905	18.500	20.500
<b>Otros China</b>	5.300	4.750	8.645	7.500	7.762
<b>Uzbekistán</b>	22.291	24.000	40.000	43.000	43.000
<b>Serbia</b>	9.224	9.000	9.000	9.000	9.000
<b>Moldavia</b>	8.637	8.500	9.000	9.000	9.000
<b>Subtotal LOC</b>	<b>49.602</b>	<b>53.750</b>	<b>77.550</b>	<b>87.000</b>	<b>89.262</b>
<b>Australia</b>	2.000	1.750	2.000	2.000	2.000
<b>Italia</b>	1.000	1.000	1.000	1.000	1.000
<b>Sudáfrica</b>	642	662	671	316	417
<b>Total</b>	<b>225.057</b>	<b>231.564</b>	<b>313.917</b>	<b>312.225</b>	<b>300.101</b>



↓  
Precio baja

↑  
Precio sube

EJE PRECIO



*Oferta del  
año 1*

*Oferta del  
año 2*

*Precio  
del año 1*

*Precio  
del año 2*

*Demanda  
del mercado  
estable*

*Cantidad  
del año 1*

*Cantidad  
del año 2*

sube el volumen

EJE CANTIDAD

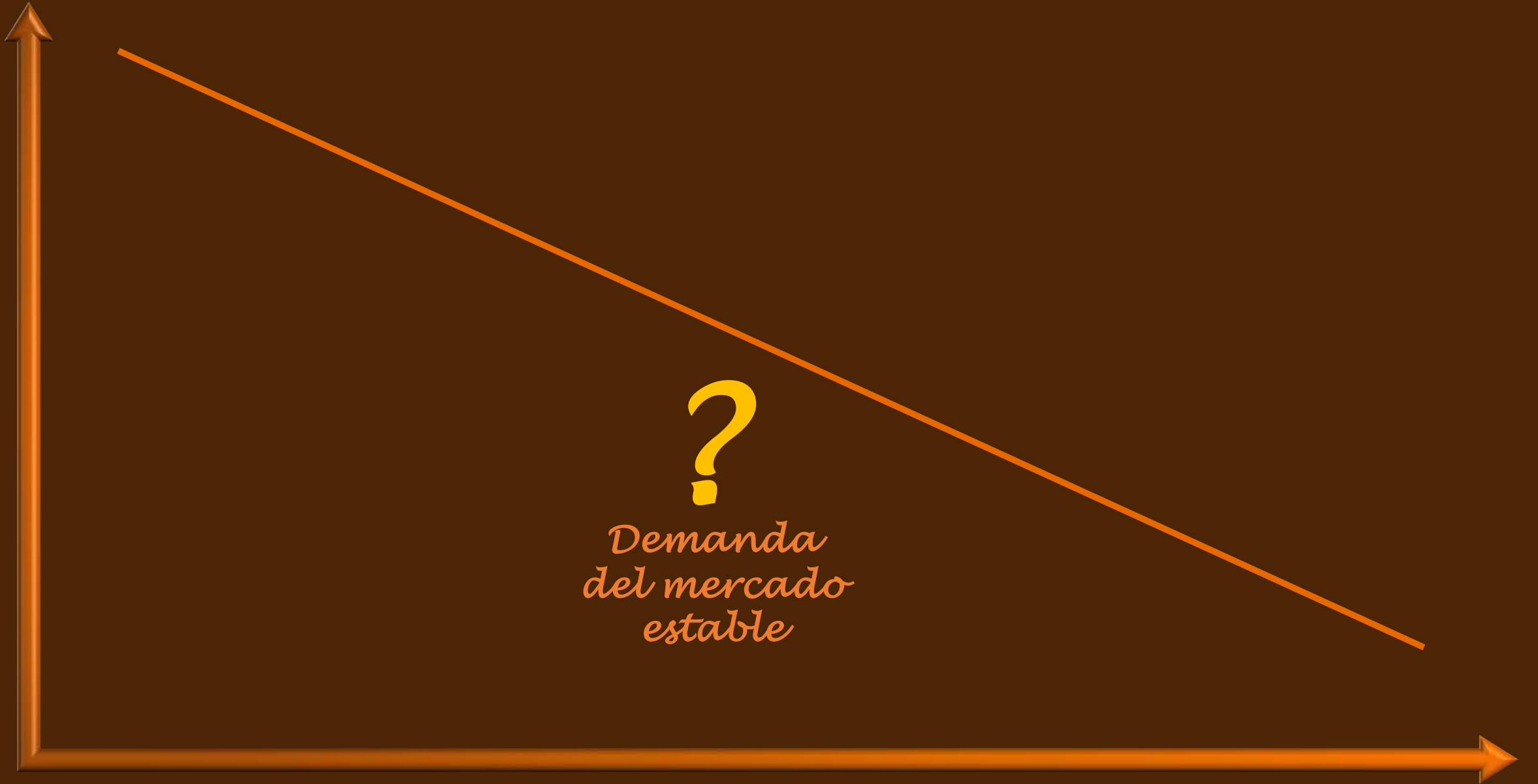
todo  
depende de  
la oferta



en el corto plazo

...puede ser

EJE PRECIO



?

*Demanda  
del mercado  
estable*

EJE CANTIDAD

La demanda es una suerte de  
"disposición a gastar" en un  
determinado producto

Una "disposición a gastar"  
que puede cambiar en el tiempo

**¿Cuánto están  
dispuestos a gastar  
hoy en telefonía fija?**







¿Qué hace cambiar  
la disposición del mercado a gastar  
en un determinado producto?

↑  
+ Ingresos del  
consumidor



↑  
+ Precio de los  
productos  
sustitutos



↓  
+ Precio de los  
productos  
complementos



↑  
+ Preferencia  
del consumidor





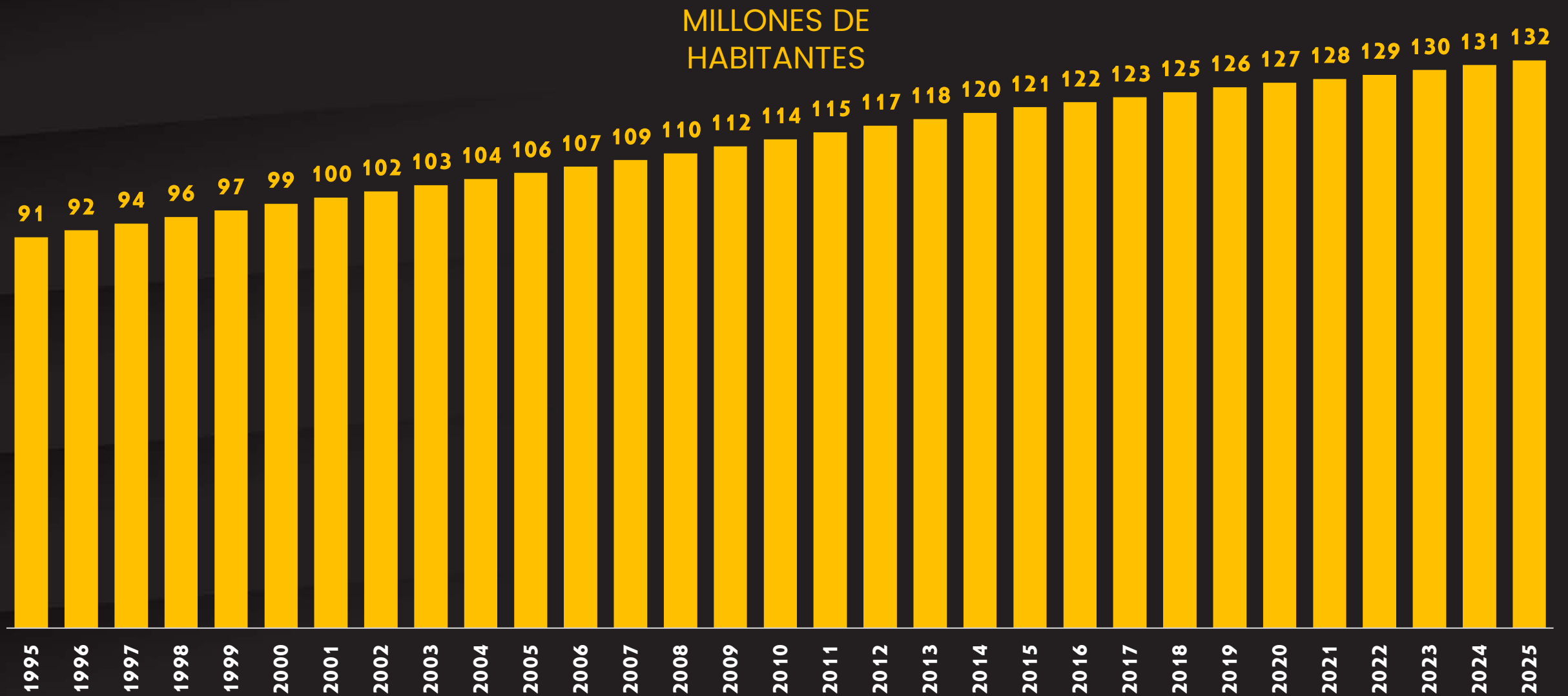
¿Qué hace  
aumentar las  
“ganas de gastar”  
en ciruela seca?



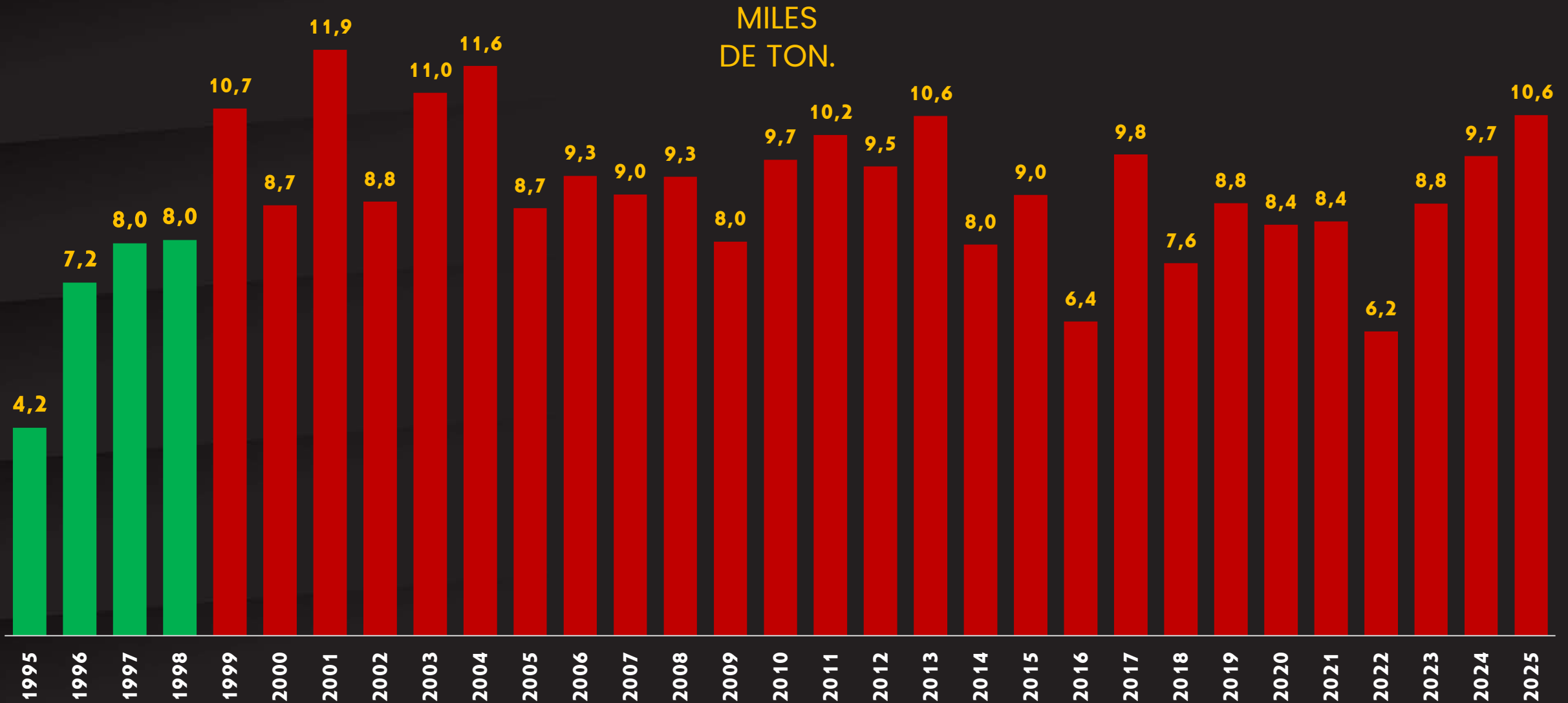


MÉXICO

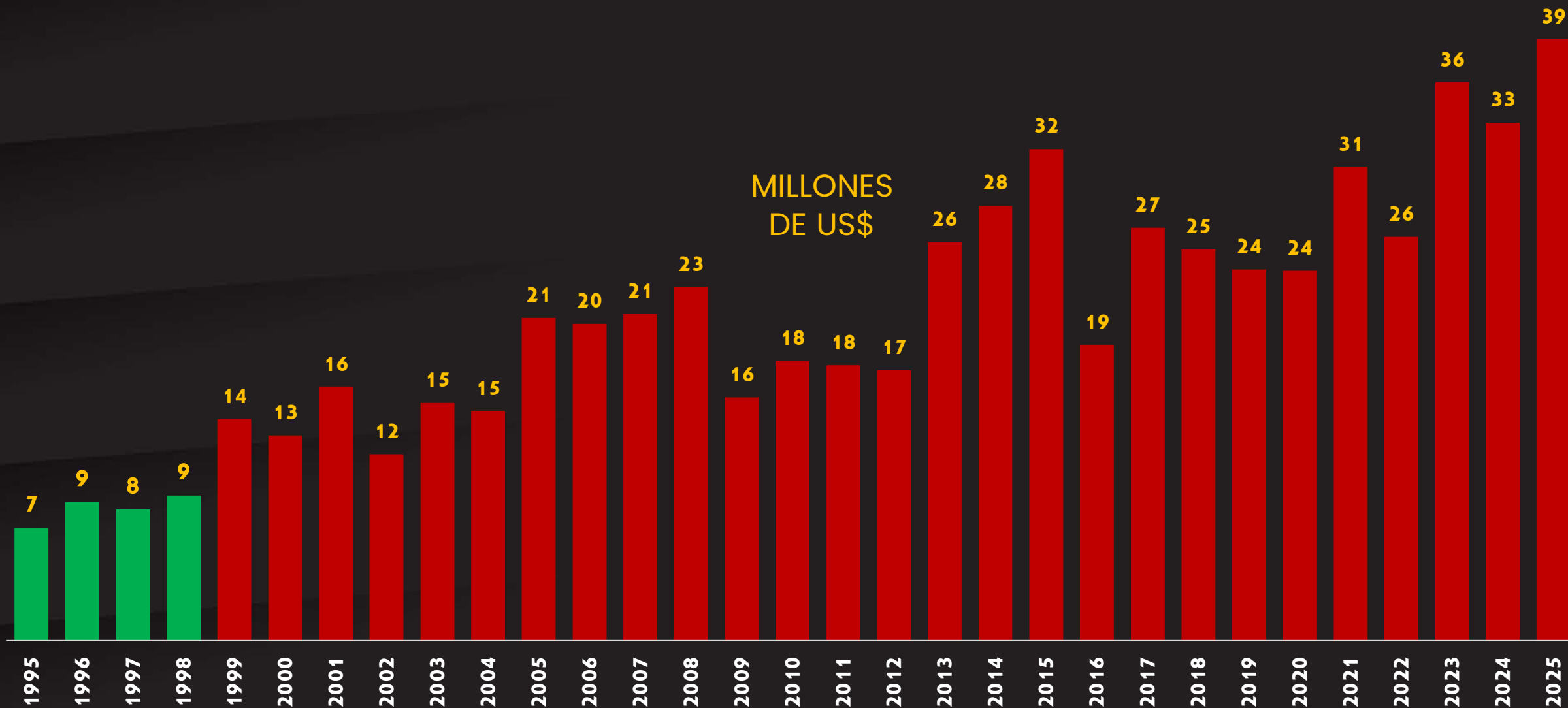
# POBLACIÓN DE MÉXICO



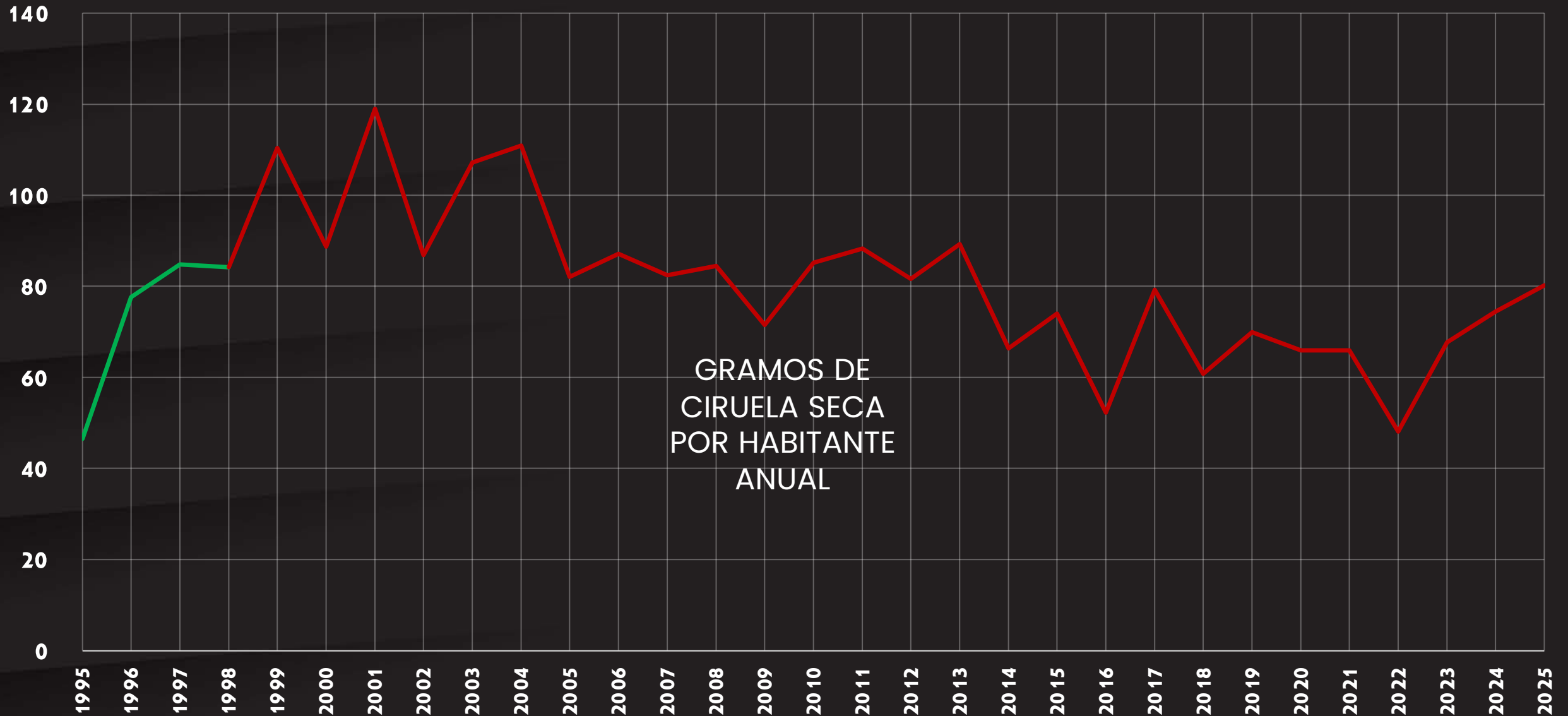
# IMPORTACIONES DE MÉXICO EN TON.



# IMPORTACIONES DE MÉXICO EN US\$



# CONSUMO PERCÁPITA DE **MÉXICO**

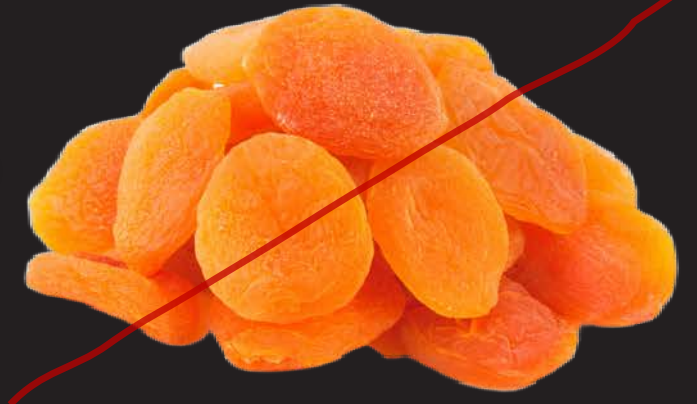


$$\ln CP = \beta_0 + \beta_1 \text{PIBP} + \beta_2 \ln P + \beta_3 \text{M\&Z}_{+18} + \beta_4 \text{COVID} + \beta_5 \text{TAX}$$

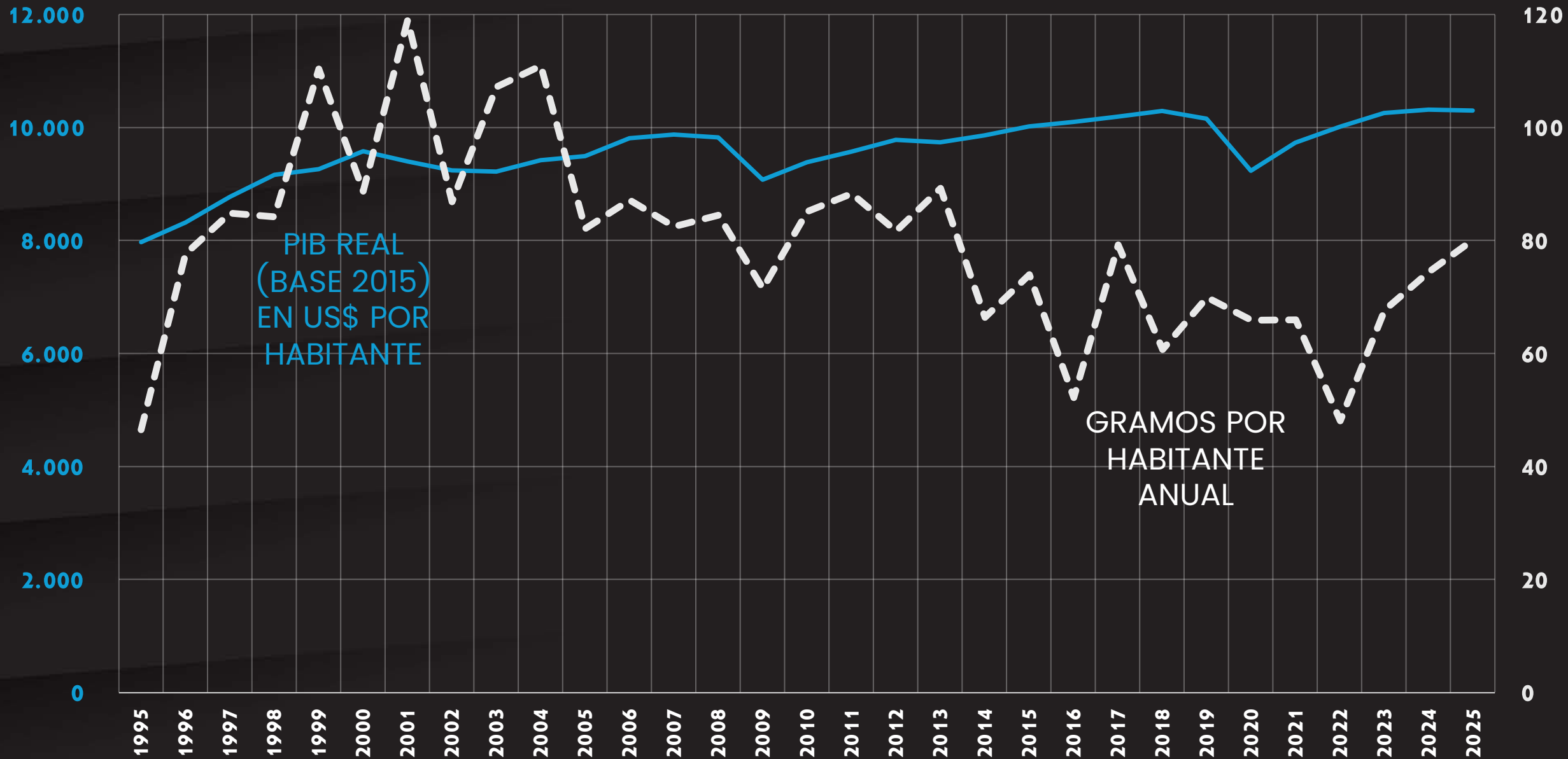
CP	Consumo (Importación) per cápita en ciruela seca	Kilos
PIBP	Producto Interno Bruto real (base 2015) per cápita	US\$
P	Precio promedio real (base 2015) de las importaciones de ciruela seca	US\$ CIF
M&Z <sub>+18</sub>	% de la población que pertenece a los Millennials & Generación Z y que tiene al menos 18 años	%
COVID	Variable dummy por efectos del COVID	2020/21=1
TAX	Variable dummy por efectos de los aranceles	2025=1



sín sustitutos  
relevantes



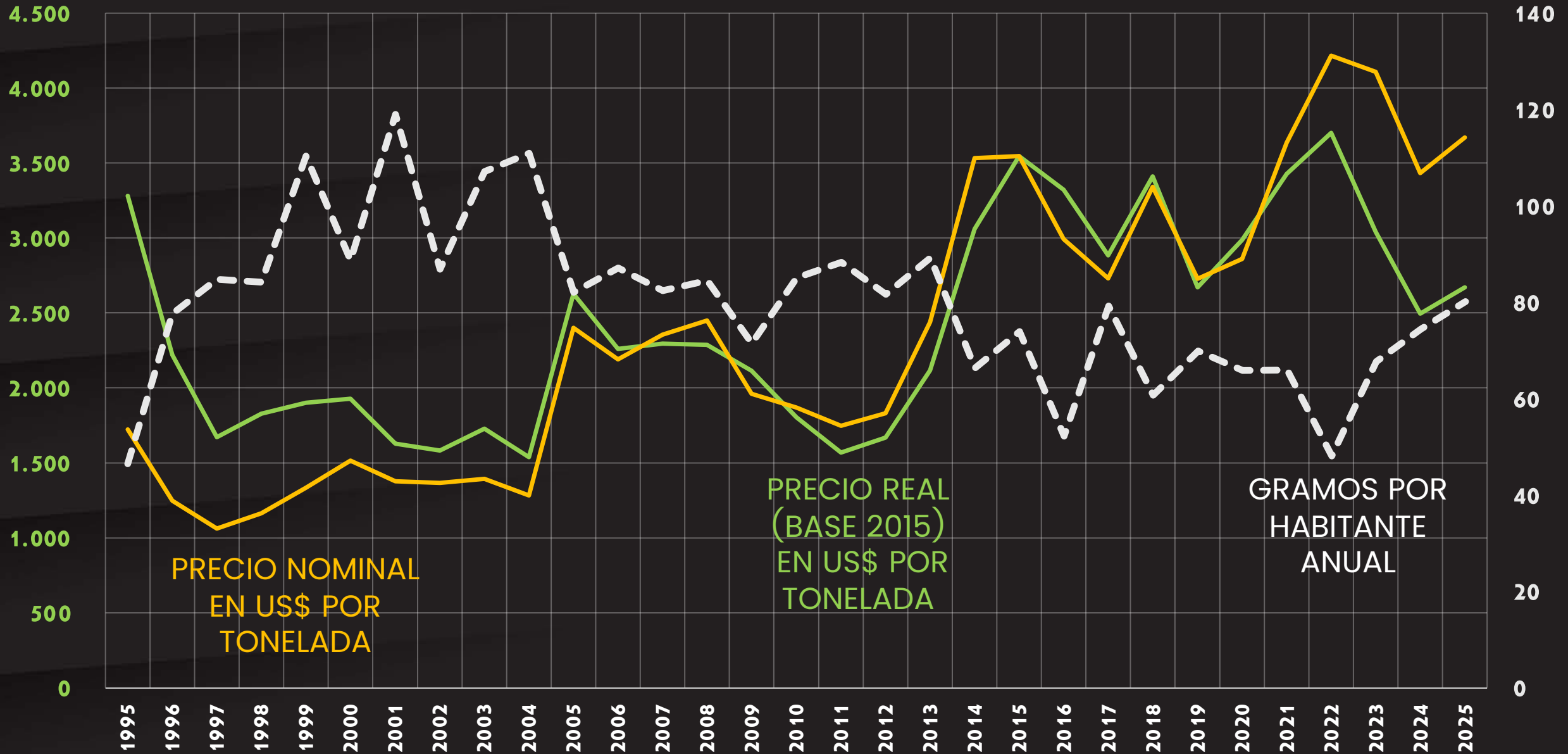
# PIB REAL PERCÁPITA DE MÉXICO



$$\beta_1 = +2,73$$

elasticidad ingreso

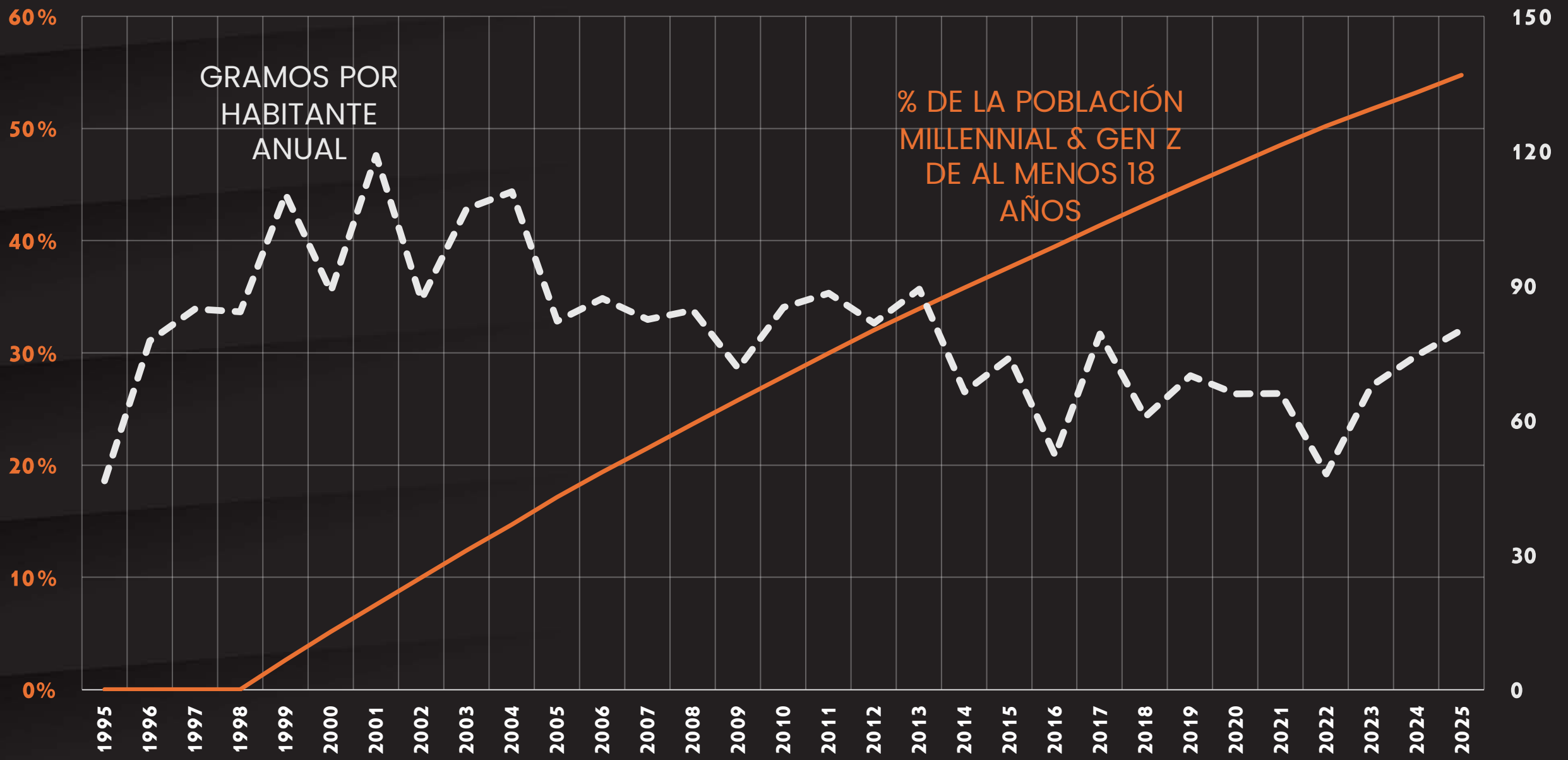
# PRECIO DE IMPORTACIÓN DE MÉXICO



$$\beta_2 = -0,55$$

elasticidad precio

# % DE LA POBLACIÓN M&Z EN MÉXICO



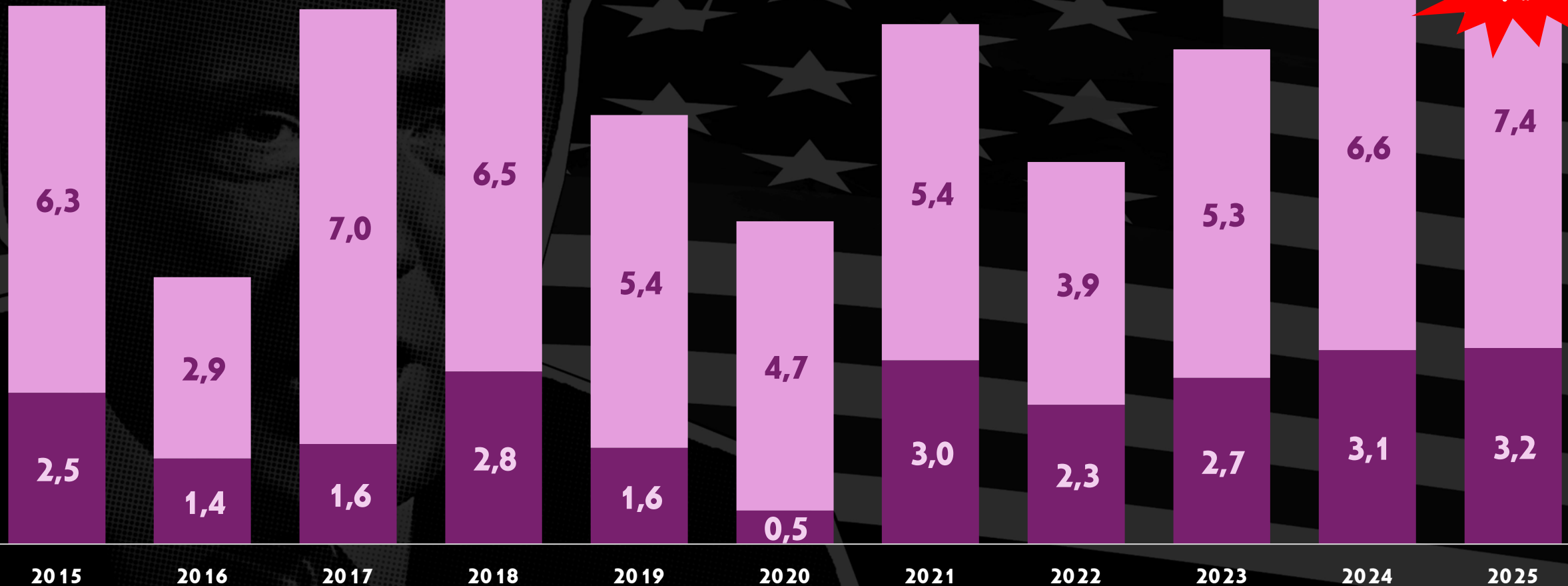
$$\beta_3 = -0,888$$

% por cada 1%

# IMPORTACIÓN POR SEMESTRE EN MÉXICO

MILES DE TONELADAS  
2<sup>do</sup> SEMESTRE

MILES DE TONELADAS  
1<sup>er</sup> SEMESTRE



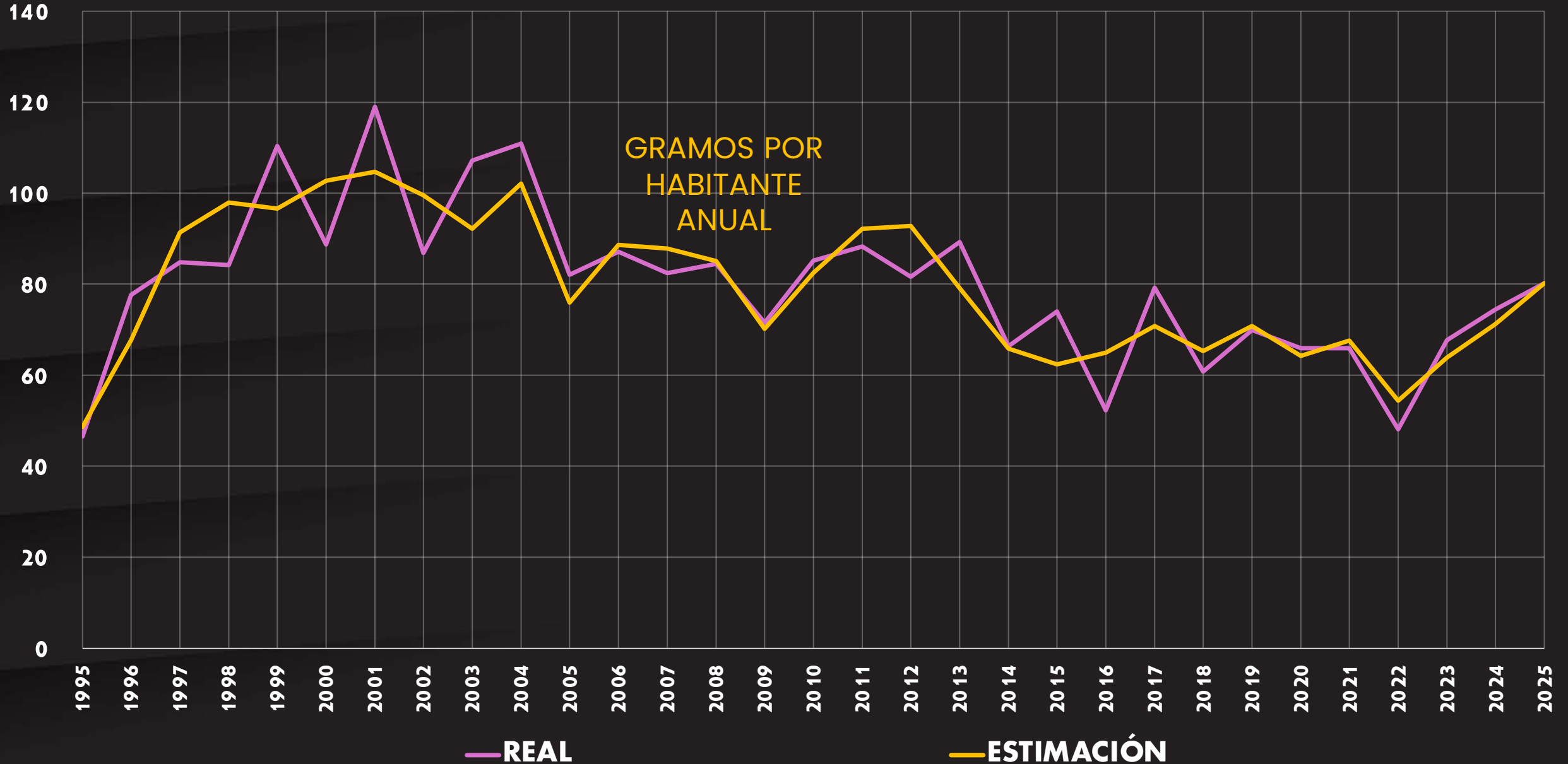
$$\beta_5 = +0,17$$

% el 2025

$$\ln CP = -20,93 + 2,73 \ln PIBP - 0,55 \ln P - 0,88 M \& Z_{+18} + 0,24 COVID + 0,17 TAX$$

Variable	PIB Percápita	Precio	M&Z <sub>+18</sub>	COVID	TAX
Beta	+2,73	-0,55	-0,88	+0,24	+0,17
Nivel	0,0%	0,0%	0,4%	3,5%	21,5%
Significativo	Muy significativo	Muy significativo	Muy significativo	Bastante Significativo	Poco Significativo
Conclusión	El consumo sube mucho con el ingreso de la gente	El precio influye mucho en el consumo	Alto impacto de las nuevas generaciones en el consumo	El COVID alteró el patrón de consumo	La expectativa de aranceles alteró levemente el consumo

# ESTIMACIÓN DEL CONSUMO PERCÁPITA

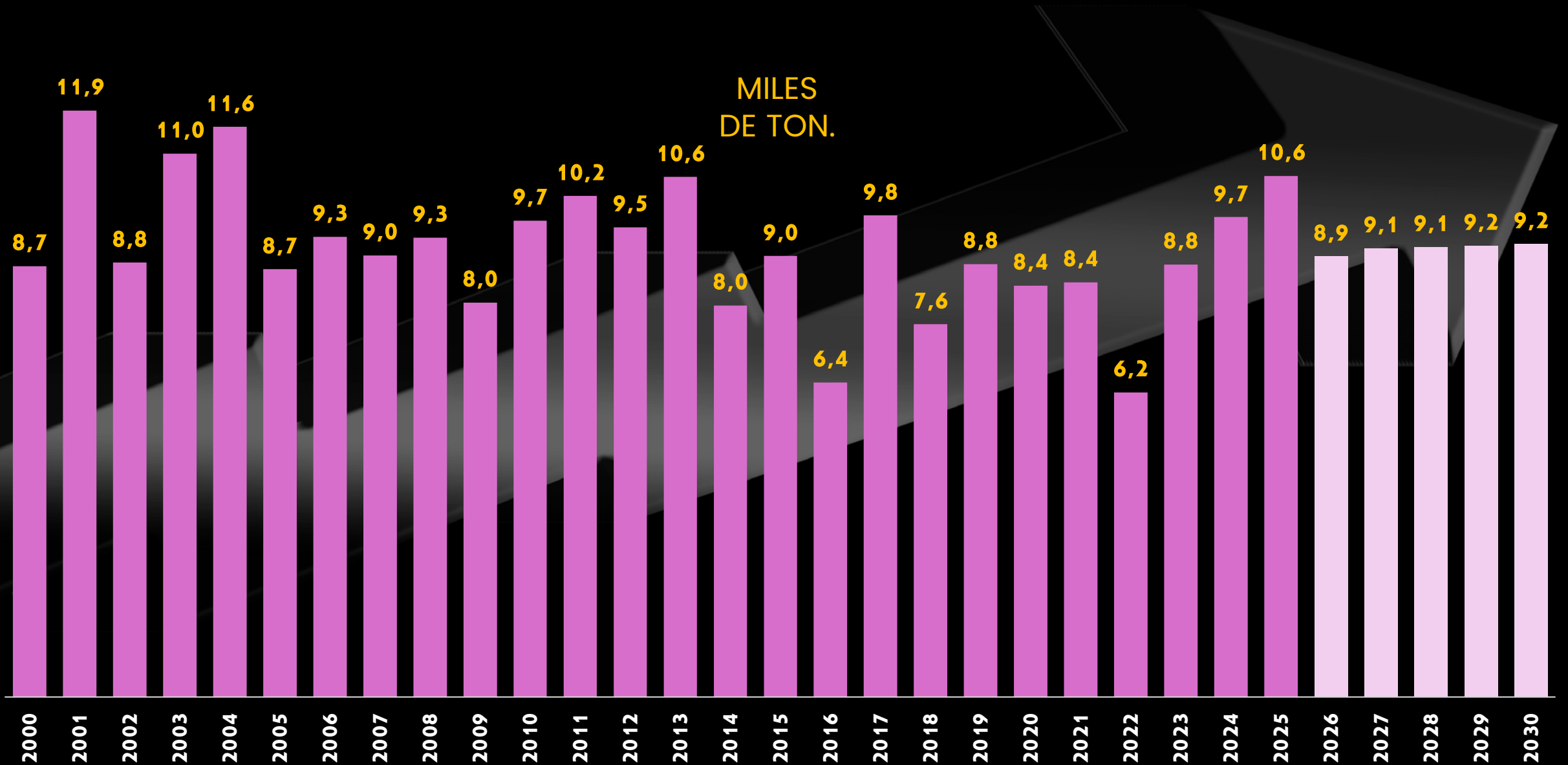


$R^2 = 76,1\%$

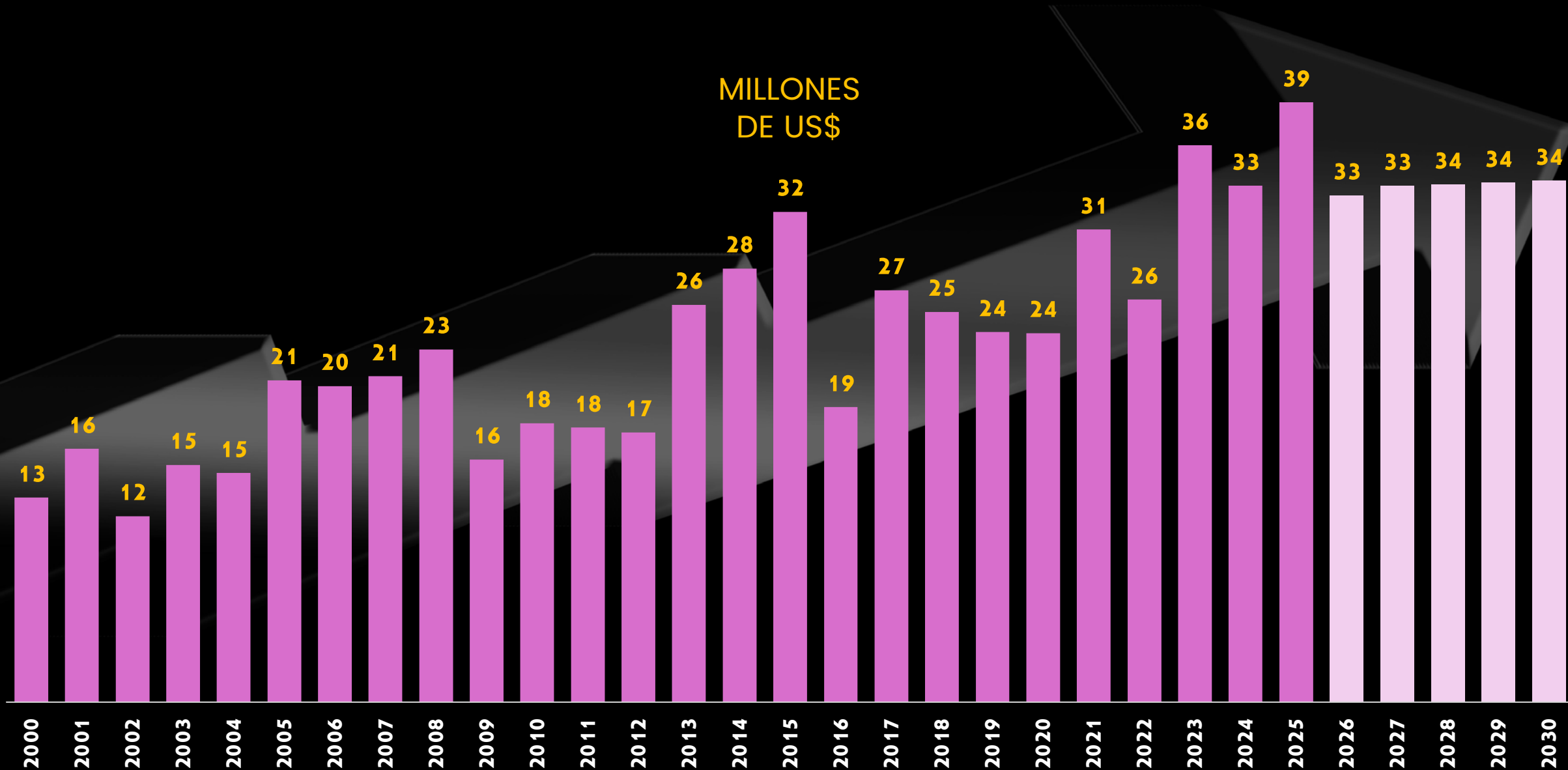
# PROYECCIÓN DEL CONSUMO PERCÁPITA



# IMPORTACIONES DE **MÉXICO** EN TON.



# IMPORTACIONES DE MÉXICO EN US\$

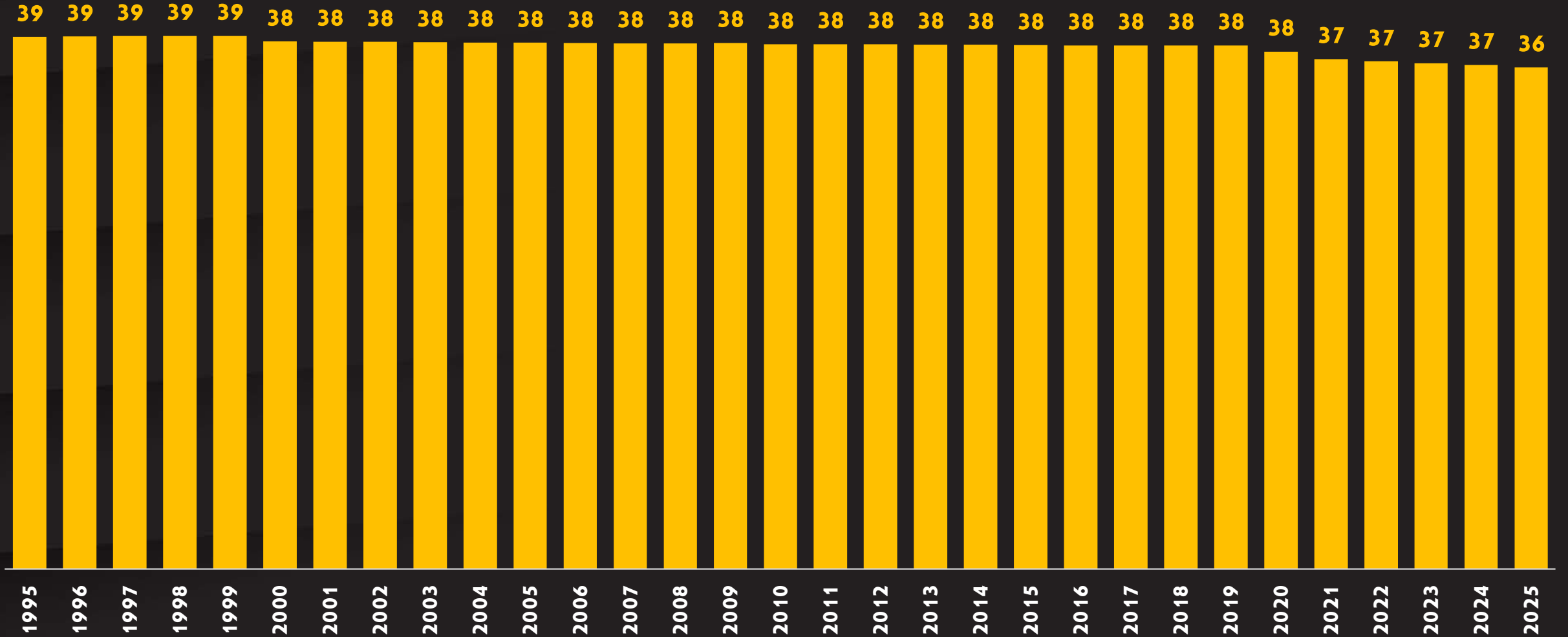




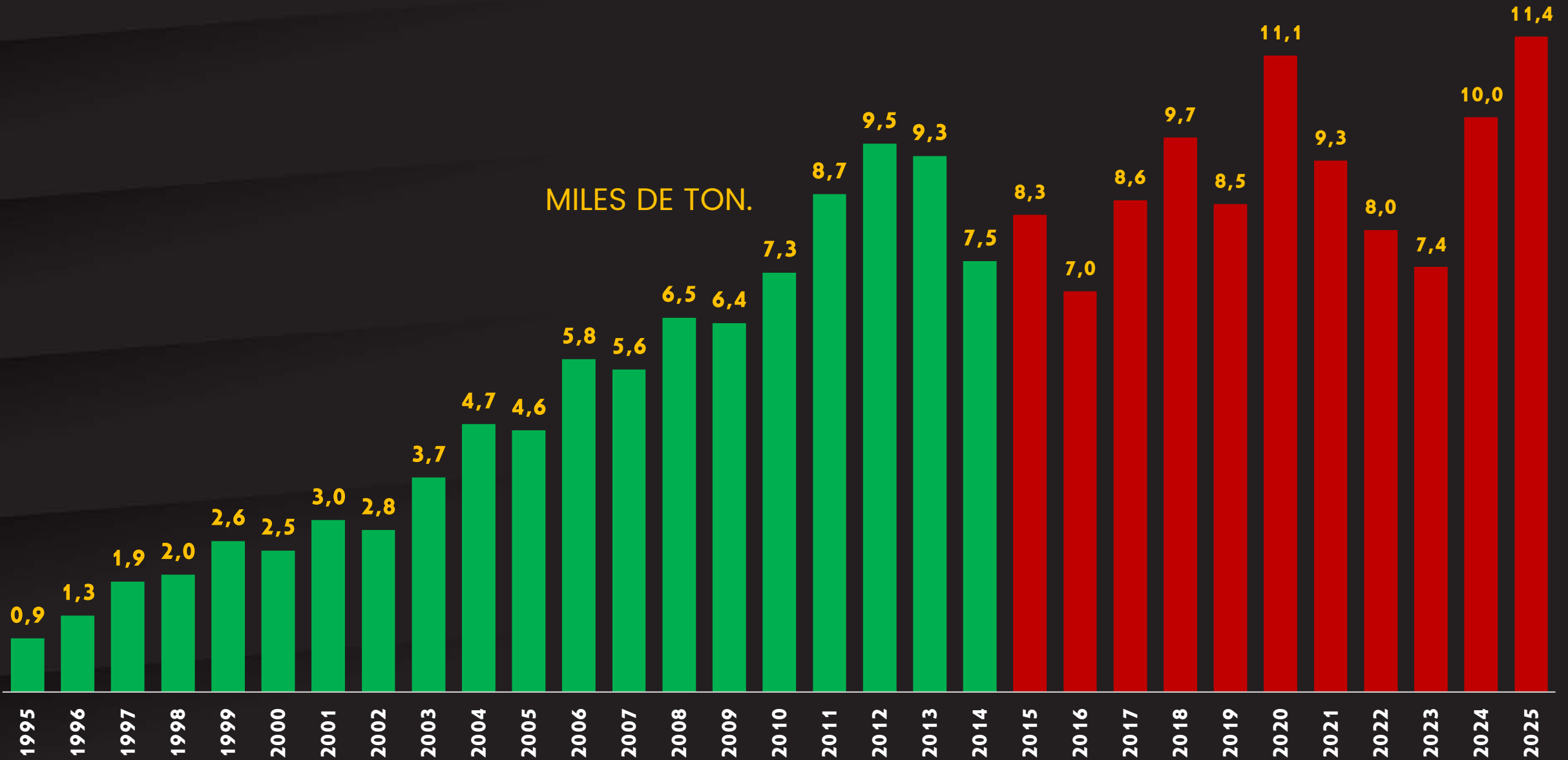
# POLONIA

# POBLACIÓN DE **POLONIA**

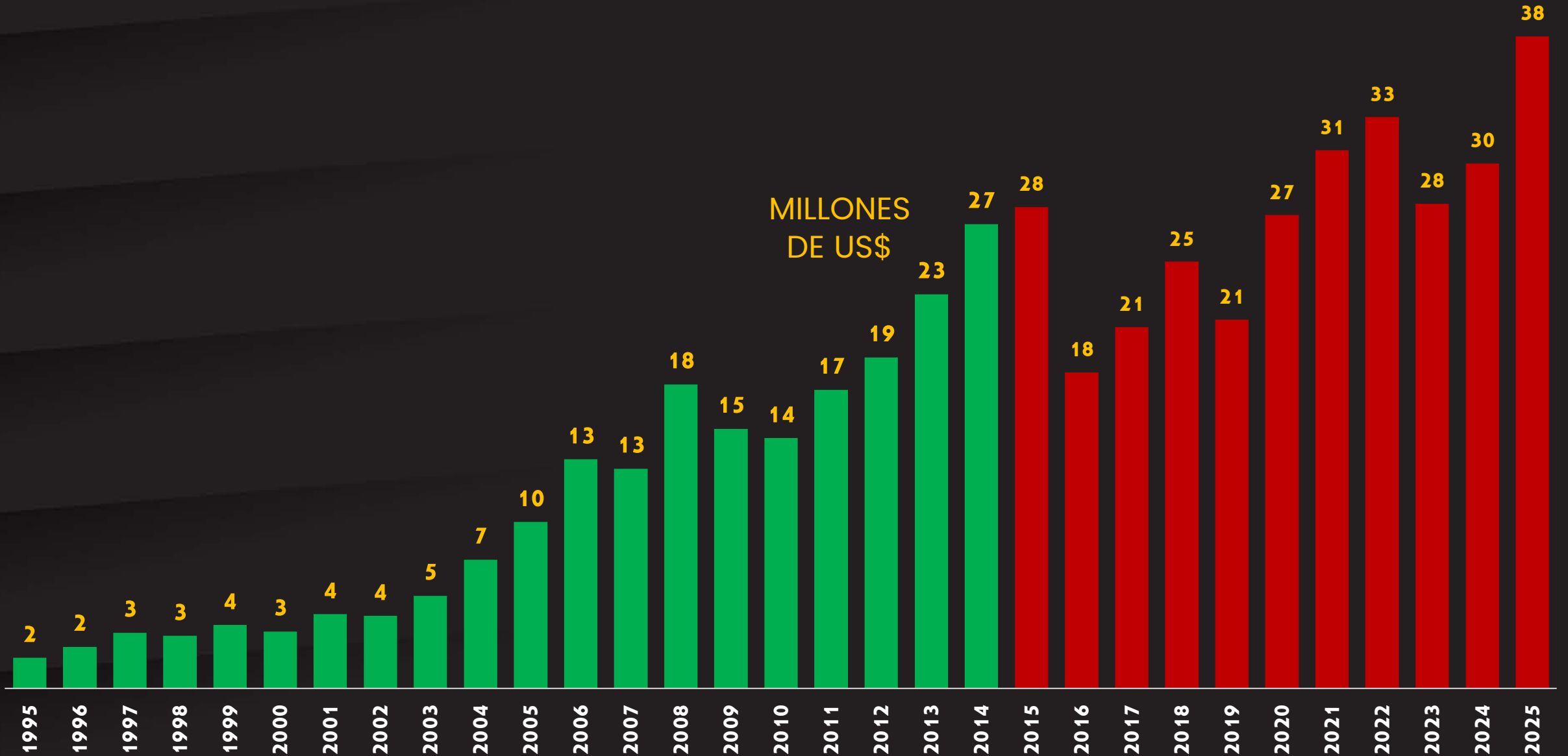
MILLONES DE HABITANTES



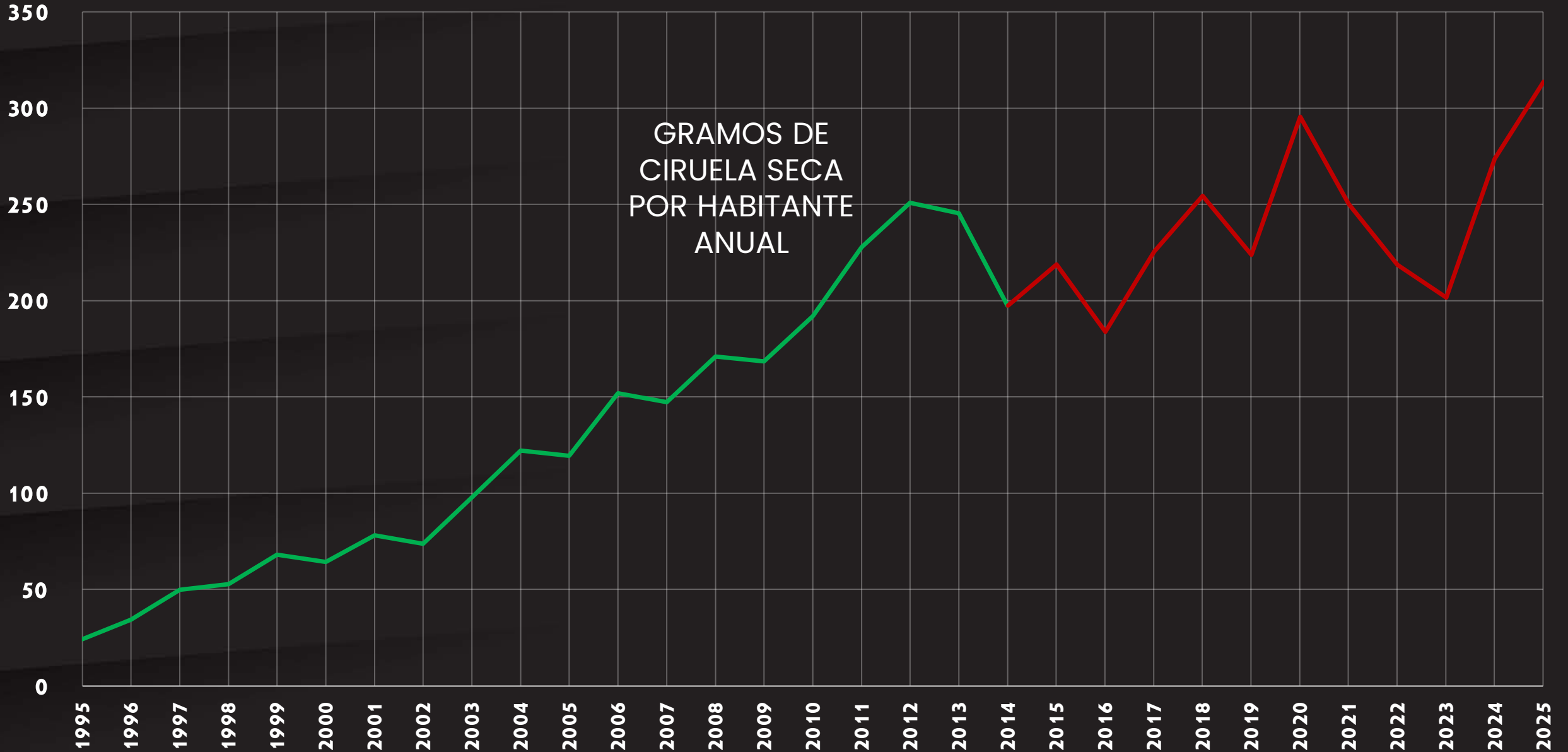
# IMPORTACIONES DE **POLONIA** EN TON.



# IMPORTACIONES DE **POLONIA** EN US\$



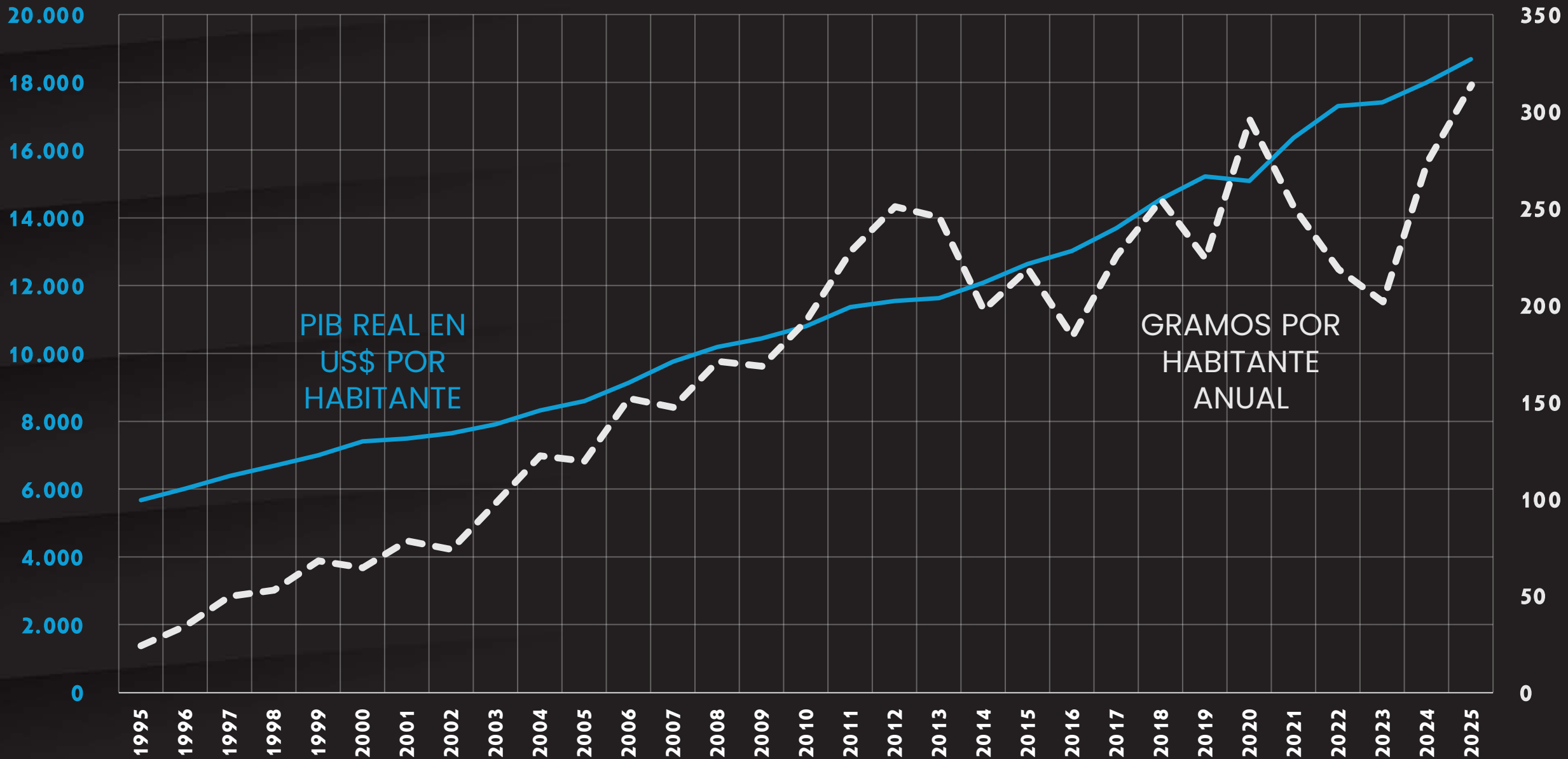
# CONSUMO PERCÁPITA DE **POLONIA**



$$\ln CP = \beta_0 + \beta_1 \text{PIBP} + \beta_2 \ln P + \beta_3 \text{GENZ}_{+18} + \beta_4 \text{COVID} + \beta_5 \text{TAX}$$

CP	Consumo (Importación) per cápita en ciruela seca	Kilos
PIBP	Producto Interno Bruto real (base 2015) per cápita	US\$
P	Precio promedio real (base 2015) de las importaciones de ciruela seca	US\$ CIF
GENZ <sub>+18</sub>	% de la población que pertenece a la Generación Z y que tiene al menos 18 años	%
COVID	Variable dummy por efectos del COVID	2020=1
TAX	Variable dummy por efectos de los aranceles	2025=1

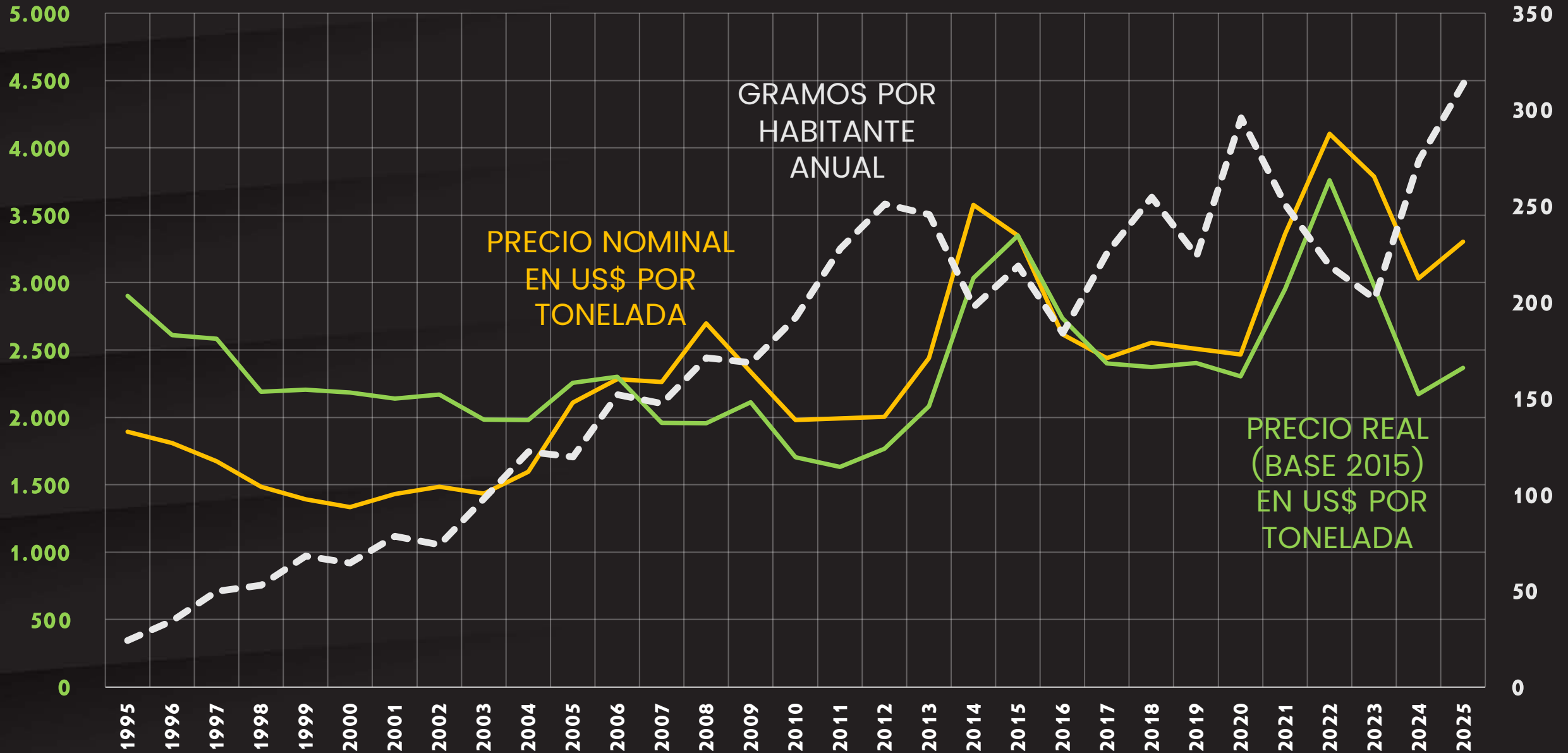
# PIB REAL PERCÁPITA DE **POLONIA**



$$\beta_1 = +2,63$$

elasticidad ingreso

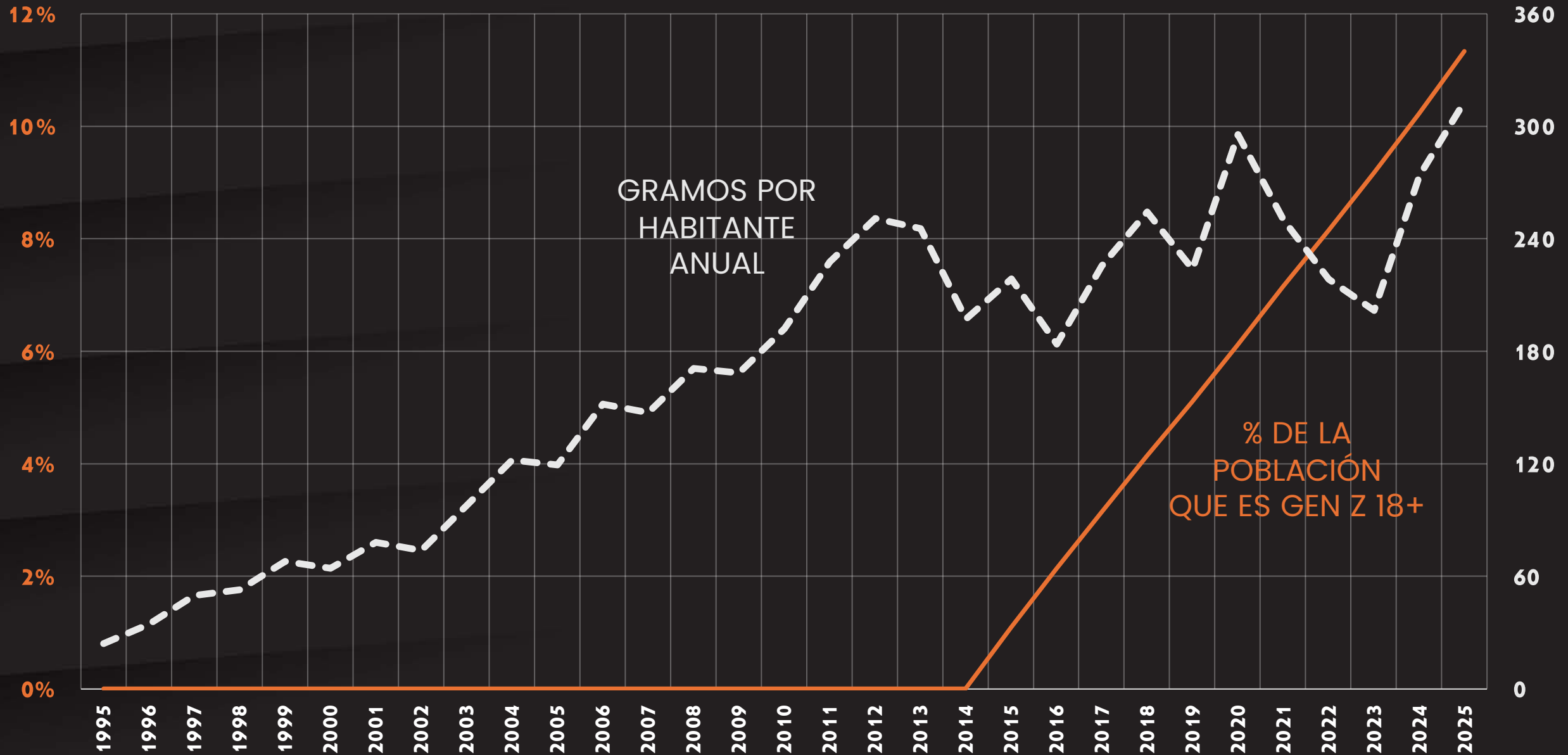
# PRECIO DE IMPORTACIÓN DE **POLONIA**



$$\beta_2 = -0,57$$

elasticidad precio

# % DE LA POBLACIÓN GEN Z EN **POLONIA**



$$\beta_3 = -10,24$$

% por cada 1%



expectativas

El 8 de mayo de 2025 la Comisión Europea lanzó una consulta pública sobre una lista de bienes que sumaba €95 mil millones en importaciones desde EE.UU, como preparación de una gran represalia a los aranceles impuestos por Donald Trump. Dentro de la lista había muchos **productos agrícolas**



## Commission consults on possible countermeasures and readies WTO litigation in response to US tariffs

Brussels, 8 May 2025

The European Commission has launched a **public consultation** on a list of US imports which could become subject to **EU countermeasures**, if ongoing EU-US negotiations do not result in a mutually beneficial outcome and the removal of the US tariffs.

The list put to consultation concerns imports from the US worth €95 billion, covering a **broad range of industrial and agricultural products**. The Commission is also consulting on possible **restrictions on certain EU exports of steel scrap and chemical products to the US** worth €4.4 billion. This consultation is designed to address both the US universal tariffs and the tariffs on cars and car parts.

Since the US imposed its unjustified and harmful tariffs, the **EU has prioritised finding a mutually beneficial and balanced solution** through negotiations, including within the framework of the 90-day partial suspension of tariffs announced by the US. These negotiations are ongoing both at political and technical level. The EU continues to prepare potential countermeasures to defend its consumers and industry, in parallel with the negotiations and in case these fail to deliver a satisfactory outcome. While the public consultation is a necessary step in this process, it does not automatically result in the adoption of countermeasures.

In parallel, the EU will also launch a **WTO dispute against the US** on its universal so-called "reciprocal" tariffs and tariffs on cars and car parts, by formally lodging a request for consultations. It is the unequivocal view of the EU that these tariffs blatantly violate fundamental WTO rules. The EU's objective is thus to reaffirm that internationally agreed rules matter, and these cannot be unilaterally disregarded by any WTO member, including the US.

Finally, the Commission continues to carefully **monitor the potential diversion of global exports onto the EU market**, which might be caused by the US tariffs imposed on third countries. In addition, the Commission will continue to **pursue negotiations with other trading partners** to find new export outlets and diversify our sources of supply. We will also continue ongoing work to reduce barriers and **strengthen the EU's Single Market**.

Commission President Ursula **von der Leyen**, said: *"Tariffs are already having a negative impact on the global economies. The EU remains fully committed to finding negotiated outcomes with the US. We believe there are good deals to be made for the benefit of consumers and businesses on both sides of the Atlantic. At the same time, we continue preparing for all possibilities, and the consultation launched today will help guide us in this necessary work"*.

### Next steps

The Commission will act under the EU's Enforcement Regulation, considering the US measures to be safeguard measures. As the first step in this process, anyone affected by potential rebalancing measures currently being considered by the EU is invited to submit their views during four weeks, including on the impact of the US tariffs. Consequently, the consultation will remain open until 10 June.

On the basis of the collected input, the Commission will finalise its proposal for the adoption of countermeasures, and consult Member States under the so-called [comitology process](#). Once this process is completed, the Commission aims to have the legal act imposing the countermeasures ready to use in case negotiations with the US do not produce a satisfactory result.

In parallel, once the EU formally submits its request for WTO consultations soon, the two parties will have up to two months to find a mutually agreed solution. If the consultations fail, the EU will be able

El 24 de julio de 2025, la UE aprobó un nuevo paquete de contramedidas a implementarse antes del 7 de febrero de 2026. En esa batería la UE incluyó la ciruela seca junto con otros frutos secos y deshidratados, con un **arancel del 30%**.

COMMISSION IMPLEMENTING REGULATION (EU) 2025/1564  
of 24 July 2025

on commercial rebalancing measures concerning certain products originating in the United States of America and certain products exported from the Union to the United States of America, and repealing Implementing Regulations (EU) 2018/724, (EU) 2018/886, (EU) 2020/502 and (EU) 2025/778

THE EUROPEAN COMMISSION,

Having regard to the Treaty on the Functioning of the European Union,

Having regard to Regulation (EU) No 654/2014 of the European Parliament and of the Council of 15 May 2014 concerning the exercise of the Union's rights for the application and enforcement of international trade rules and amending Council Regulation (EC) No 3286/94 laying down Community procedures in the field of the common commercial policy in order to ensure the exercise of the Community's rights under international trade rules, in particular those established under the auspices of the World Trade Organization (1), and in particular Article 4(1) and Article 7(3) thereof,

Whereas:

- (1) On 8 March 2018 the United States of America (the United States) introduced, on the basis of Section 232 of the United States' Trade Expansion Act of 1962, tariffs at a level of 25 % and 10 % *ad valorem* on imports of certain steel and aluminium products, respectively, effective from 23 March 2018 and with an unlimited duration. After two deferrals of the effective date of application with respect to the Union, on 1 June 2018, the tariffs became effective with respect to imports originating in the Union, with an unlimited duration (the 2018 steel and aluminium safeguard measures). The United States subsequently modified or suspended part of those measures.
- (2) On 24 January 2020, the United States introduced, on the basis of Section 232 of the United States' Trade Expansion Act of 1962, tariffs at a level of 25 % and 10 % *ad valorem* on imports of certain derivative aluminium products and certain derivative steel products, respectively, effective from 8 February 2020, including with respect to the Union, with an unlimited duration (the 2020 steel and aluminium safeguard measures). The United States subsequently suspended those measures.
- (3) On 10 February 2025, the United States adjusted, on the basis of Section 232 of the United States' Trade Expansion Act of 1962, the tariffs on imports into the United States of steel and aluminium products and steel and aluminium derivative products, originating *inter alia* in the Union, referred to in recitals (1) and (2), with effect from 12 March 2025 (2), with an unlimited duration, by introducing or reintroducing:
  - (a) the 2018 and 2020 steel and aluminium safeguard measures in the form of additional customs duties on imports of steel and aluminium products and steel and aluminium derivative products originating *inter alia* in the Union, at the initial levels of 25 % and 10 % *ad valorem*, respectively;
  - (b) an increase in the rate of the 2018 and 2020 steel and aluminium safeguard measures to 25 % *ad valorem* on imports of aluminium products and aluminium derivative products that were initially subject to 10 % *ad valorem* and originating *inter alia* in the Union (the extended steel and aluminium safeguard measures); and
  - (c) new tariffs at a level of 25 % *ad valorem* on imports of additional steel and aluminium products and additional steel and aluminium derivative products originating *inter alia* in the Union (the 2025 steel and aluminium safeguard measures).

(1) OJ L 189, 27.6.2014, p. 50, ELI: <http://data.europa.eu/eli/reg/2014/654/oj>.

(2) Presidential Proclamation no. 10896 of 10 February 2025, Adjusting Imports of Steel into the United States, and the Annexes to it; Presidential Proclamation no. 10985 of 10 February 2025, Adjusting Imports of Aluminium into the United States, and the Annexes to it.

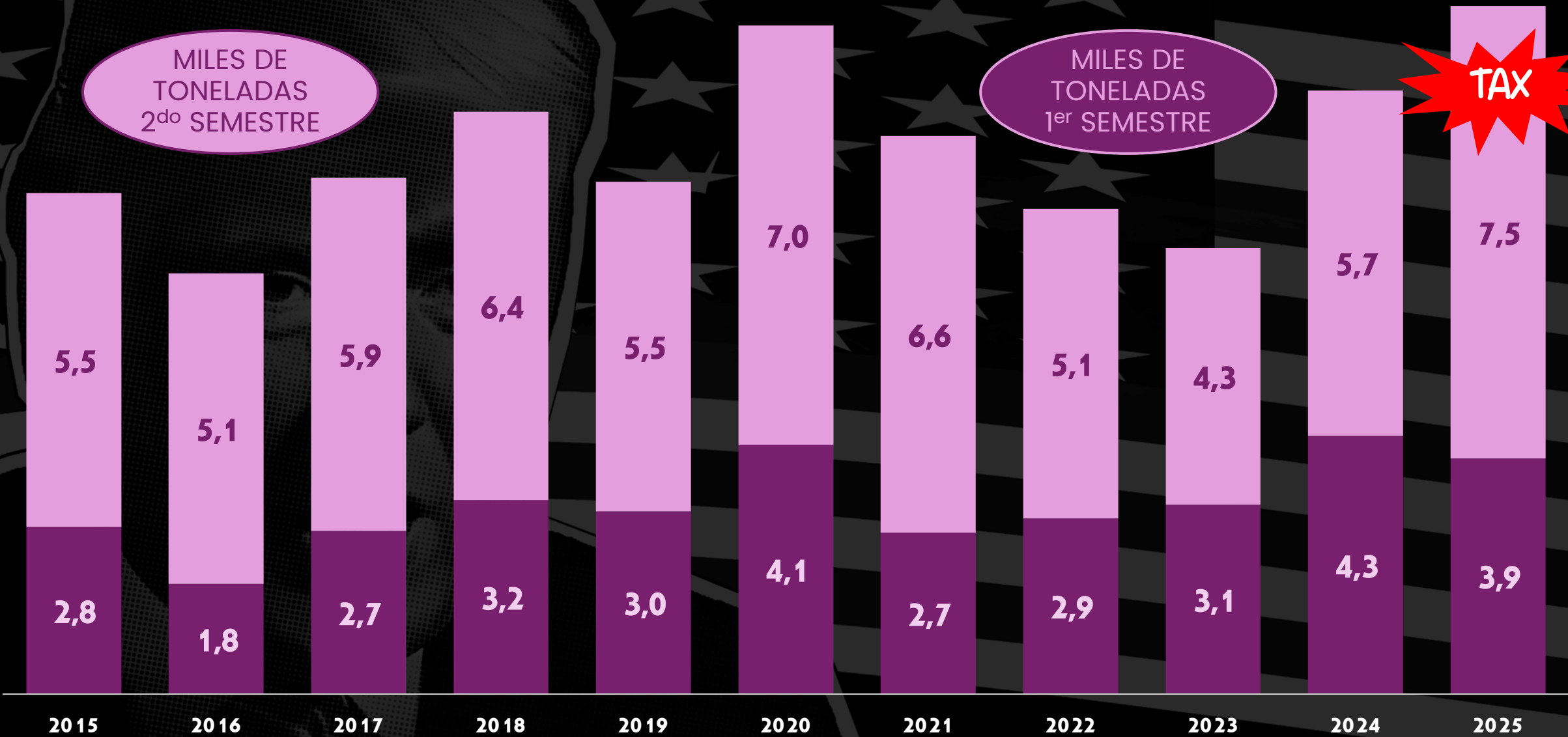
En el reglamento de la UE del 24 de julio de 2025 – Commission Implementing Regulation (EU) 2025/1564— aparece la partida CN 0813 20 00, que corresponde a “dried prunes” / ciruelas secas, con un **30% de arancel**.

EN

OJL, 24.7.2025

0813 10 00	30%
0813 20 00	30%
0813 30 00	30%
0813 40 10	30%

# IMPORTACIÓN POR SEMESTRE EN **POLONIA**



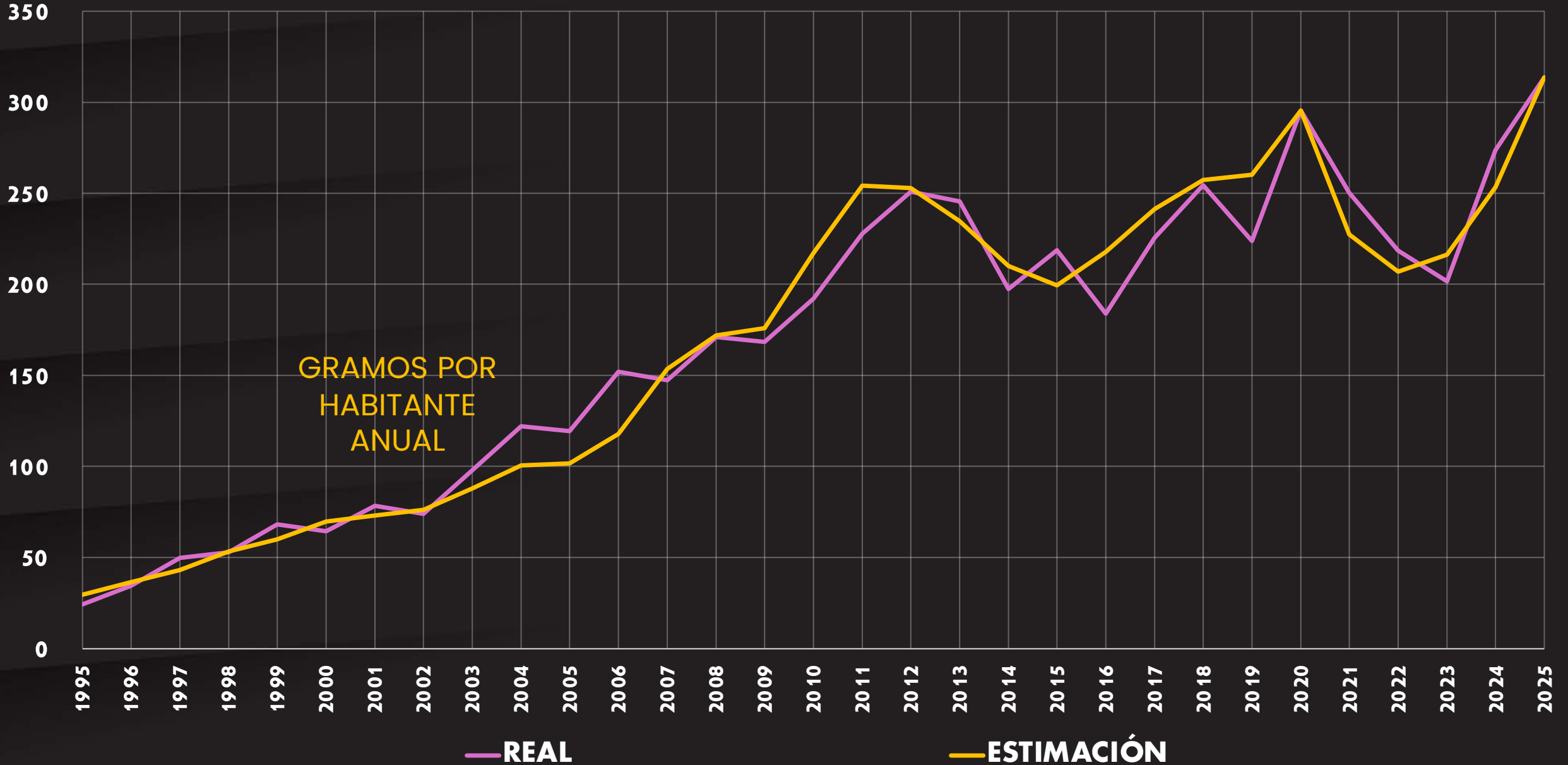
$$\beta_5 = +0,28$$

% el 2025

$$\ln CP = -21,68 + 2,63 \ln PIBP - 0,57 \ln P - 10,24 Z_{+18} + 0,23 \text{COVID} + 0,28 \text{TAX}$$

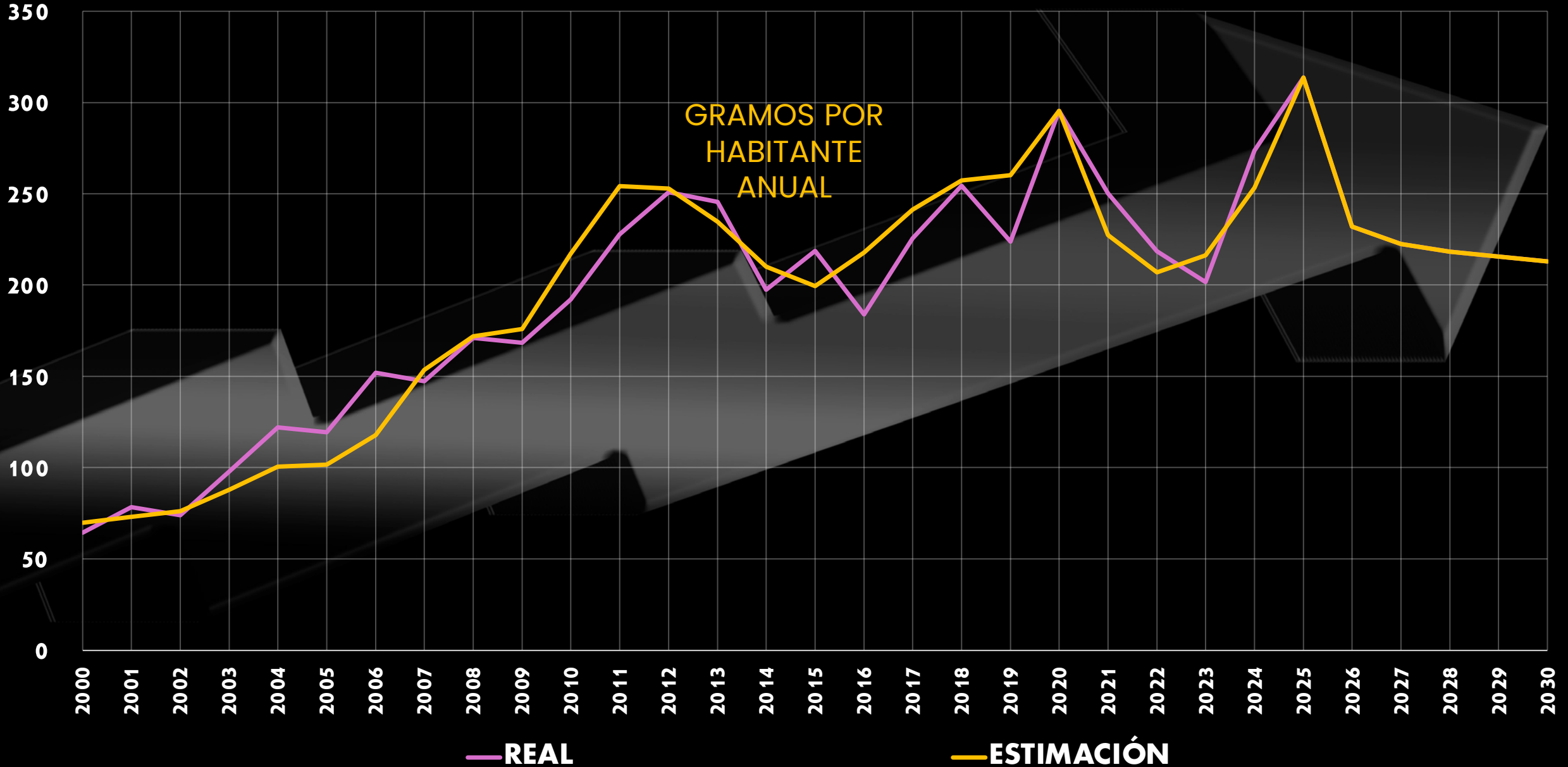
Variable	PIB Percápita	Precio	Z <sub>+18</sub>	COVID	TAX
Beta	+2,63	-0,57	-10,24	+0,23	+0,28
Nivel	0,0%	0,0%	0,0%	9,0%	75%
Significativo	Muy significativo	Muy significativo	Muy significativo	Poco Significativo	Poco Significativo
Conclusión	El consumo sube mucho con el ingreso de la gente	El precio influye mucho en el consumo	Gran impacto de la Generación Z en el consumo	El COVID alteró el patrón de consumo	La expectativa de aranceles alteró el consumo

# ESTIMACIÓN DEL CONSUMO PERCÁPITA

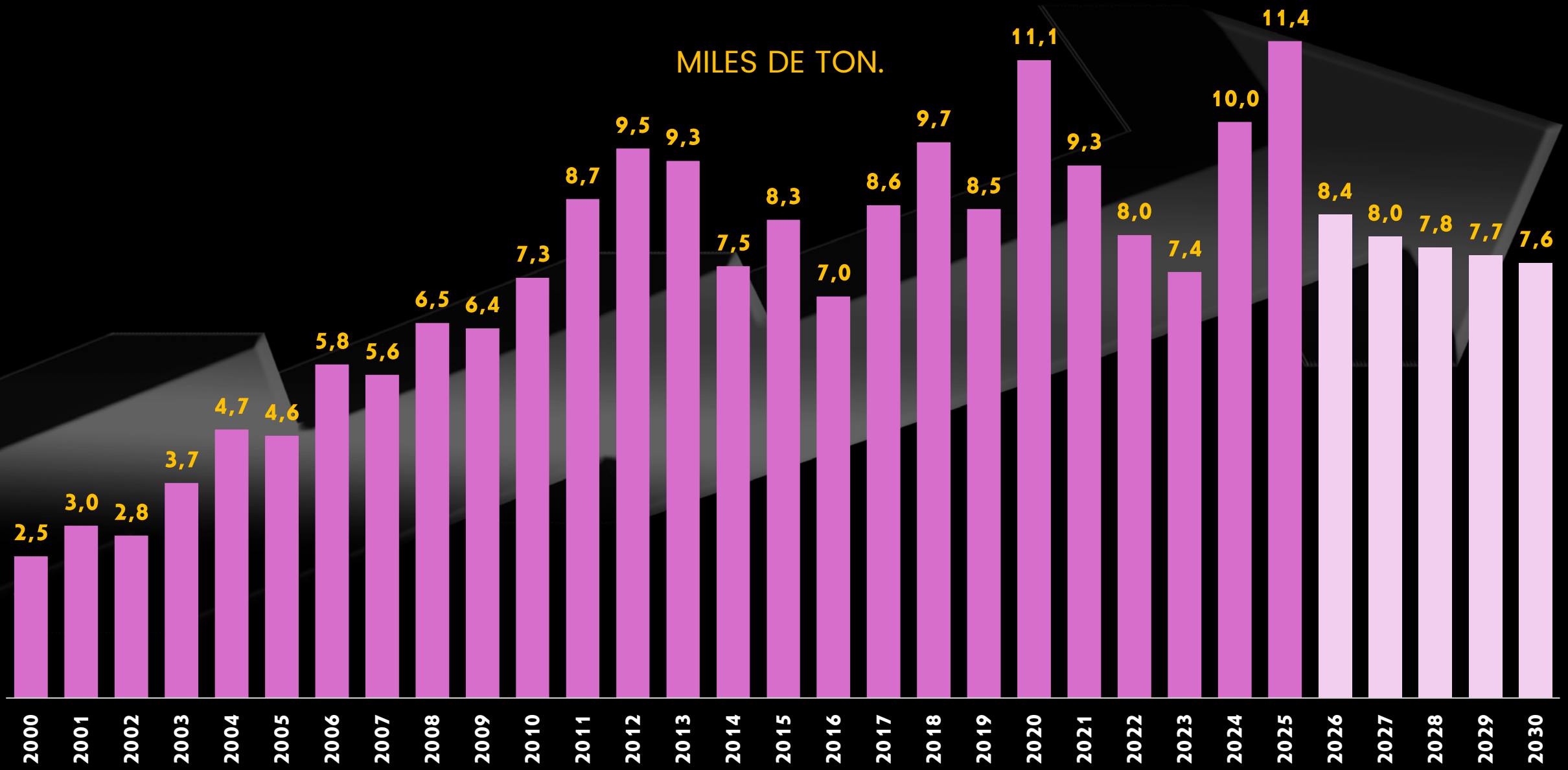


$R^2 = 97,7\%$

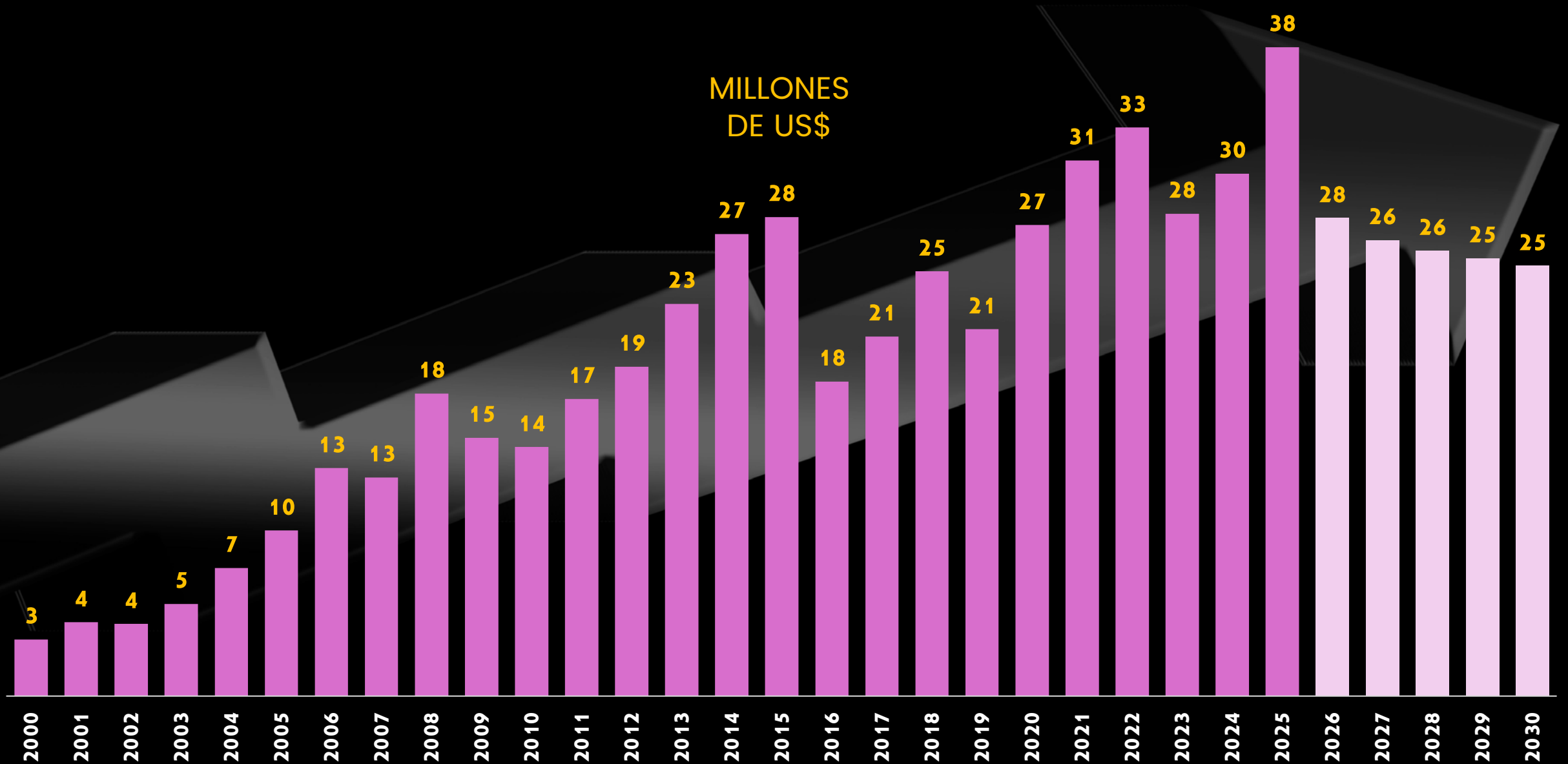
# PROYECCIÓN DEL CONSUMO PERCÁPITA



# IMPORTACIONES DE **POLONIA** EN TON.



# IMPORTACIONES DE **POLONIA** EN US\$

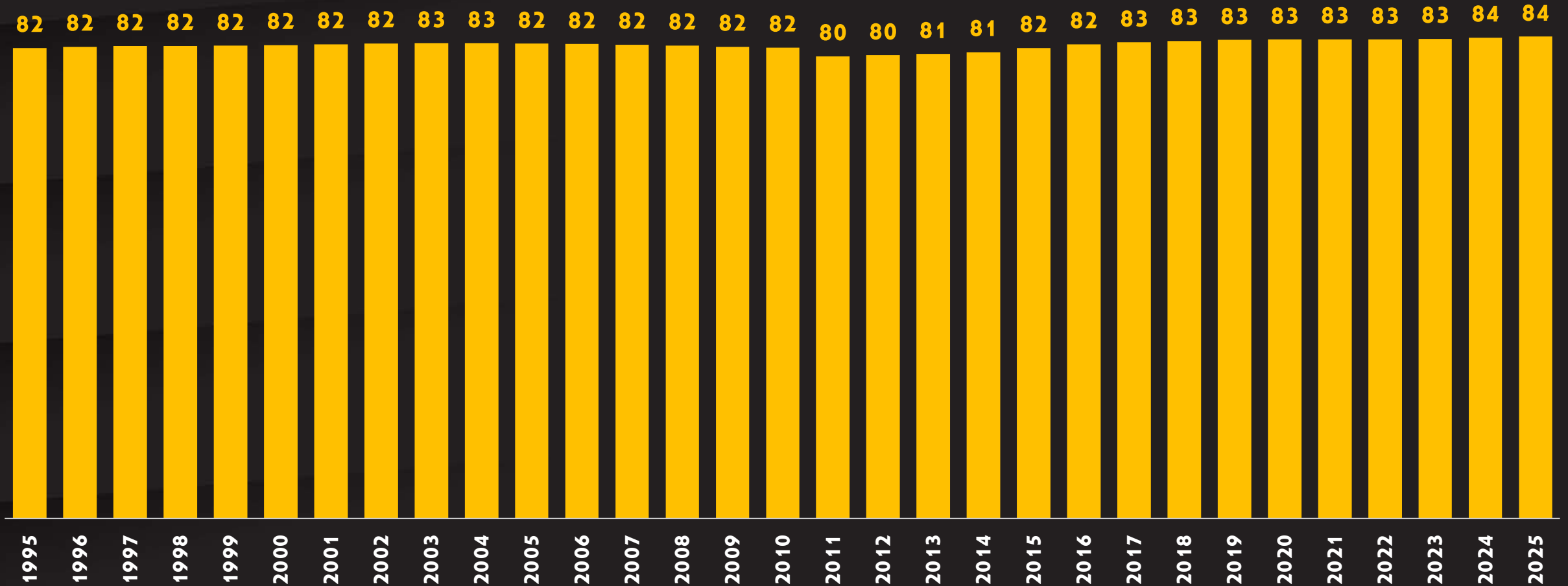


A photograph of a market stall in Germany, likely a Christmas market. The stall is filled with wooden crates containing various types of nuts and confectionery. In the foreground, there is a large crate of dark, glossy, round confectionery. Behind it, several other crates contain different types of nuts, including light-colored almonds and darker, possibly roasted, nuts. The background shows a busy market street with other stalls, a large German flag, and a church with a tall spire. The word "ALEMANIA" is overlaid in white, uppercase letters across the center of the image.

ALEMANIA

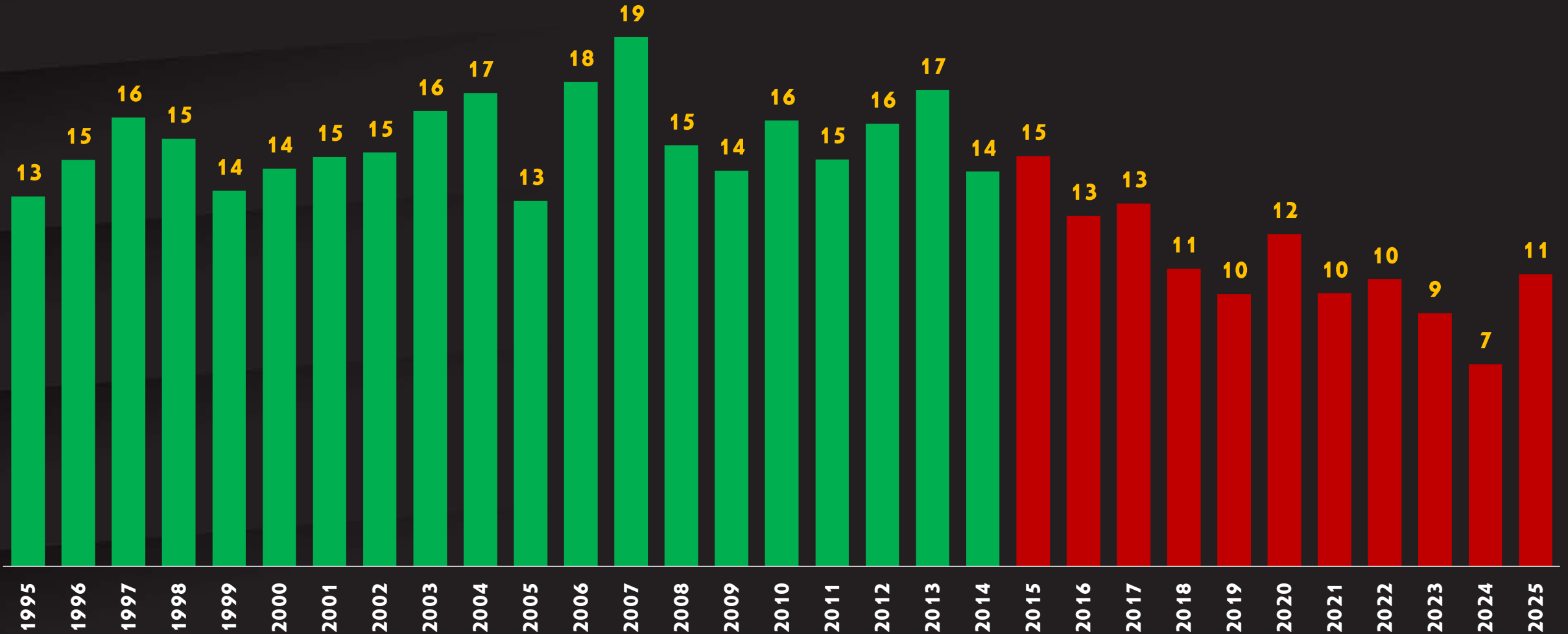
# POBLACIÓN DE ALEMANIA

MILLONES DE HABITANTES

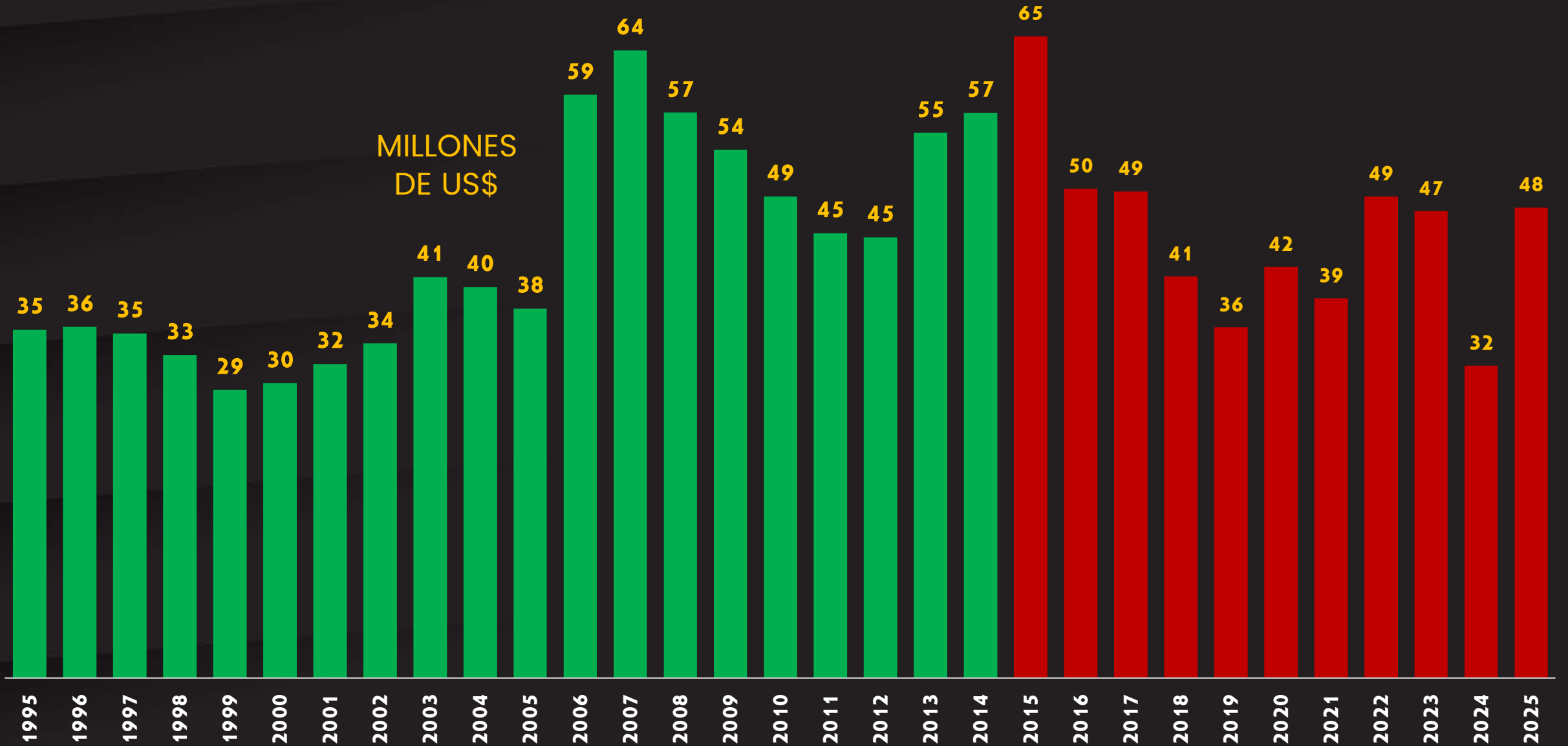


# IMPORTACIONES DE ALEMANIA EN TON.

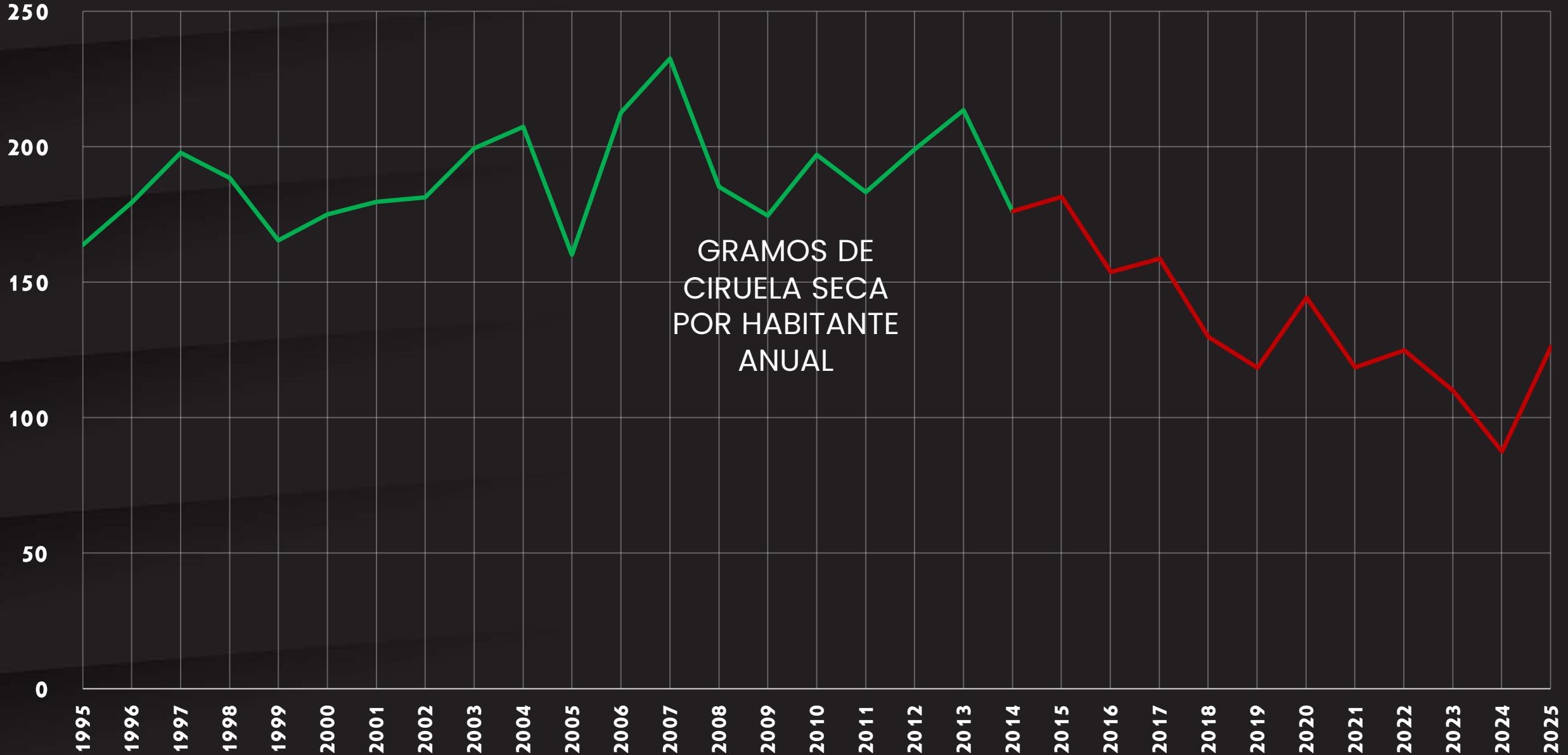
MILES DE TON.



# IMPORTACIONES DE ALEMANIA EN US\$



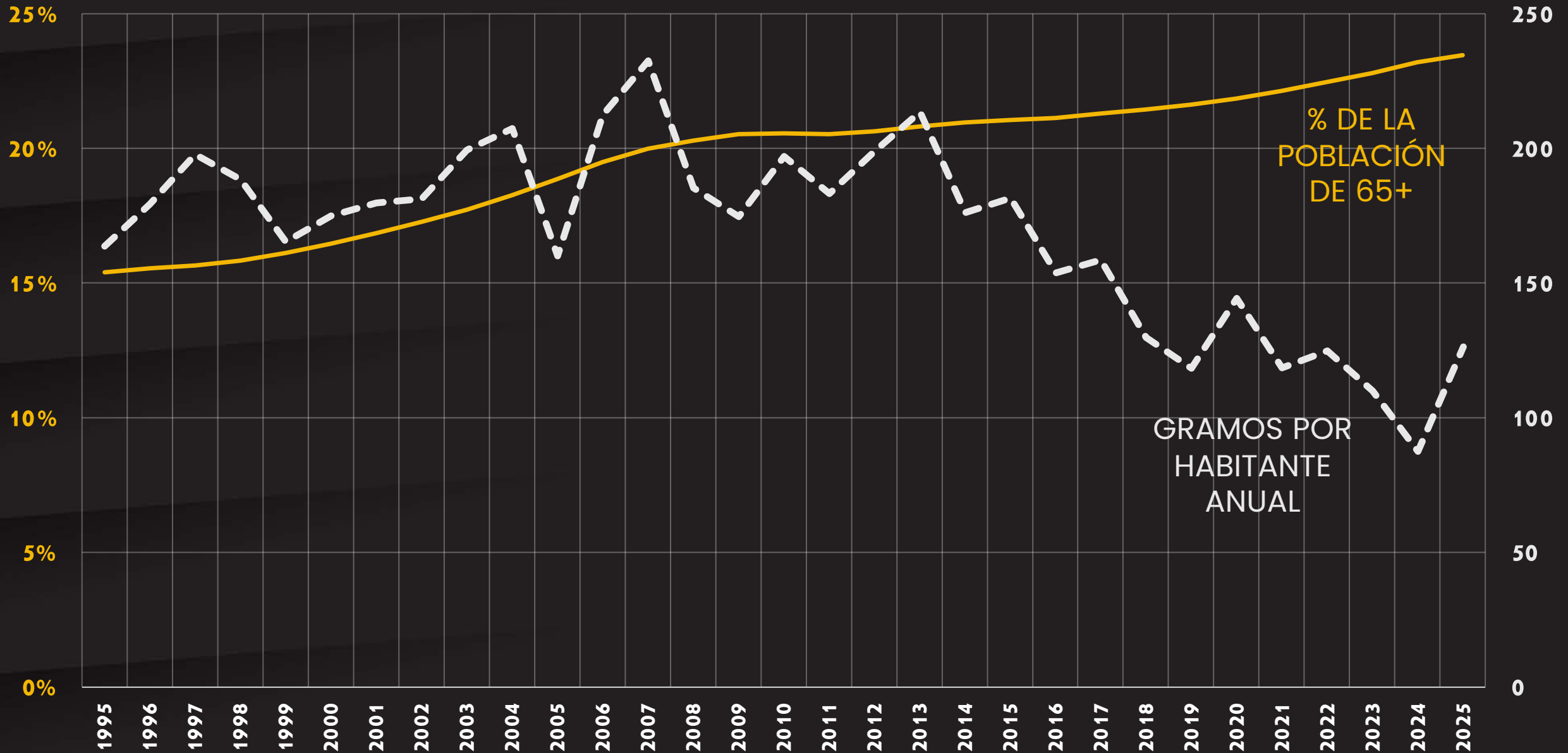
# CONSUMO PERCÁPITA DE **ALEMANIA**



$$\ln CP = \beta_0 + \beta_1 POB_{+65} + \beta_2 \ln P + \beta_3 Z_{+18} + \beta_4 COVID + \beta_5 TAX$$

CP	Consumo (Importación) per cápita en ciruela seca	Kilos
POB <sub>+65</sub>	% de la población que tiene al menos 65 años	%
P	Precio promedio real (base 2015) de las importaciones de ciruela seca	US\$ CIF
Z <sub>+18</sub>	% de la población que pertenece a la Generación Z y que tiene al menos 18 años	%
COVID	Variable dummy por efectos del COVID	2020=1
TAX	Variable dummy por efectos de los aranceles	2025=1

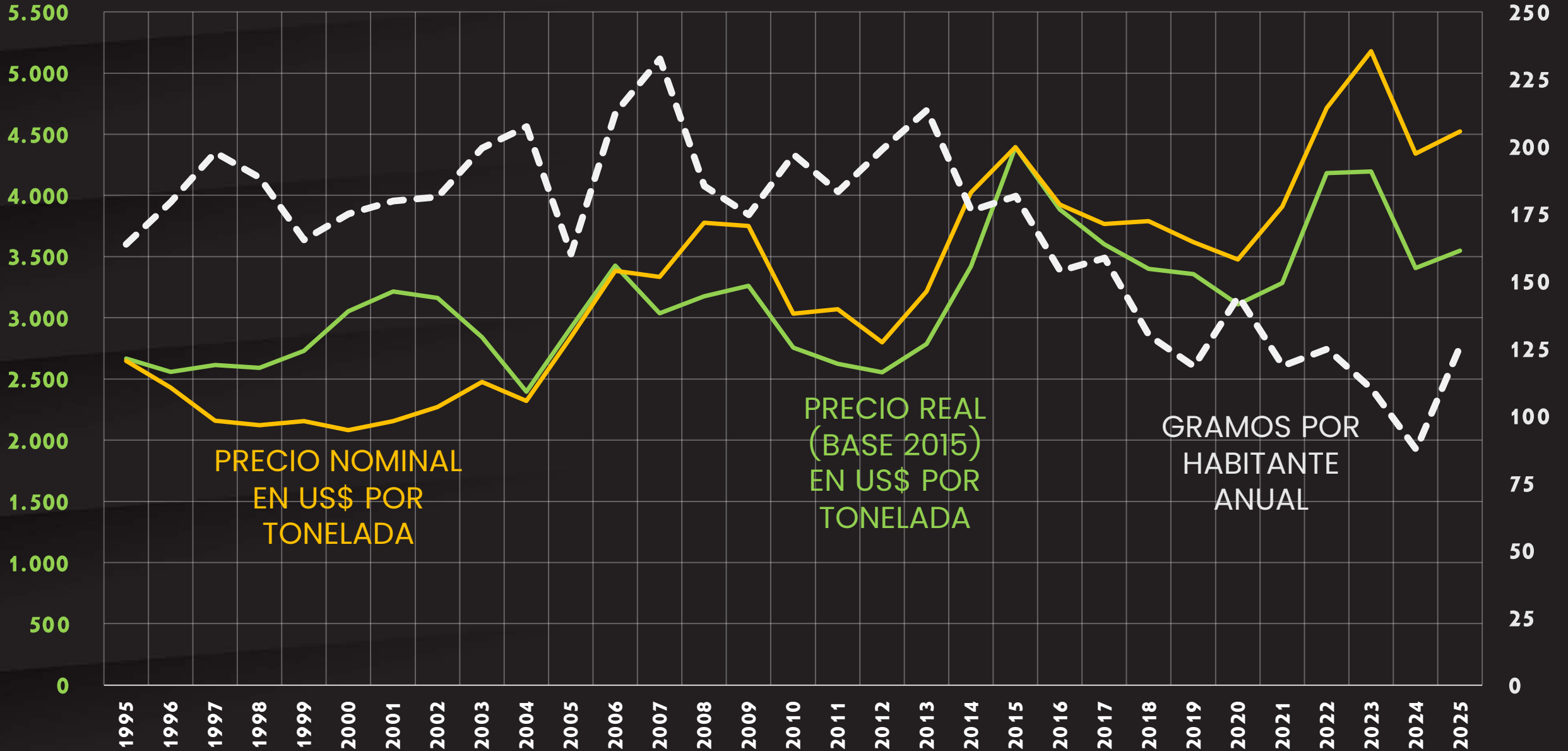
# % DE LA POBLACIÓN DE 65+ EN ALEMANIA



$$\beta_1 = +1,49$$

% por cada 1%

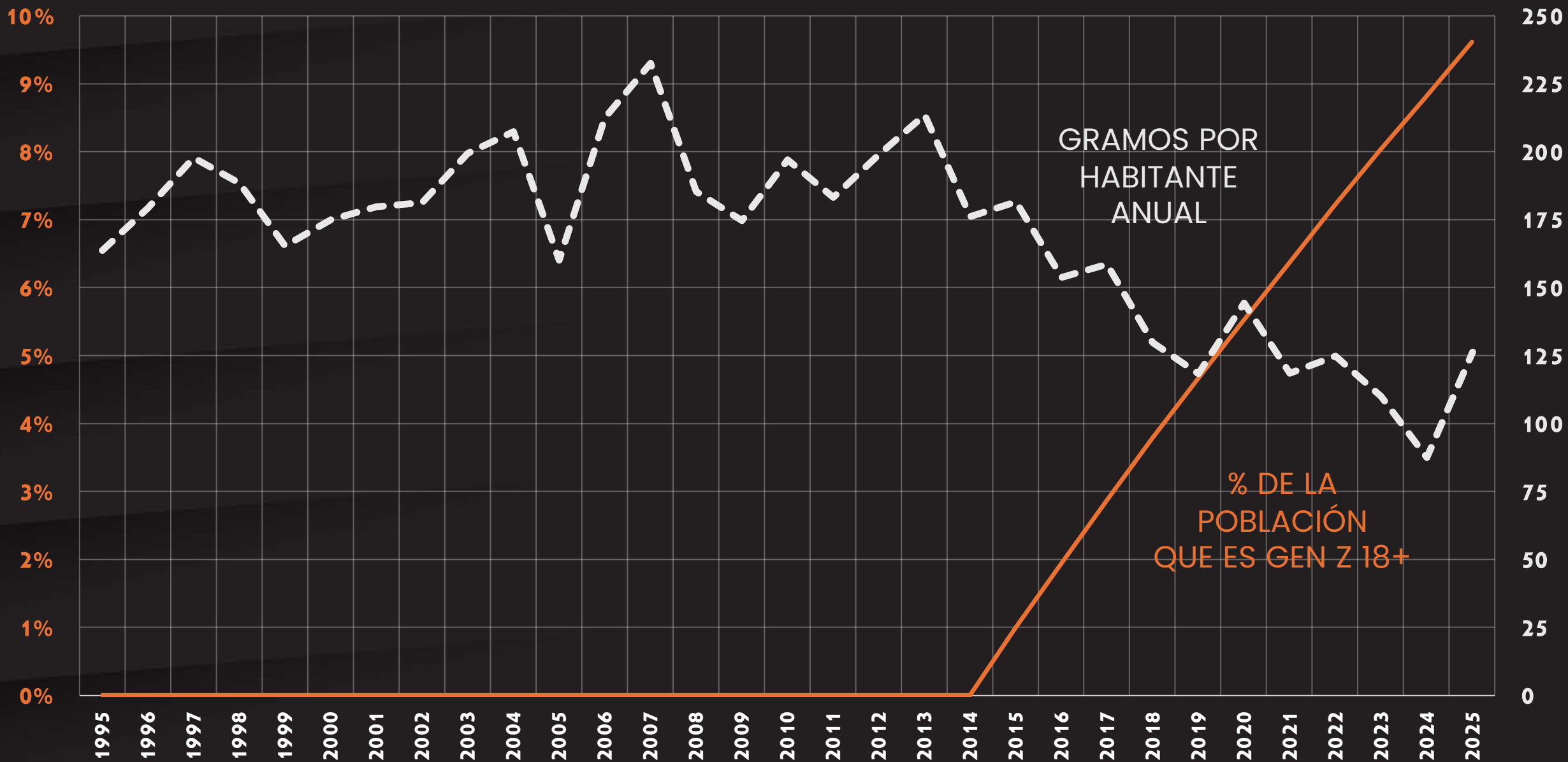
# PRECIO DE IMPORTACIÓN DE ALEMANIA



$$\beta_2 = -0,02$$

elasticidad precio

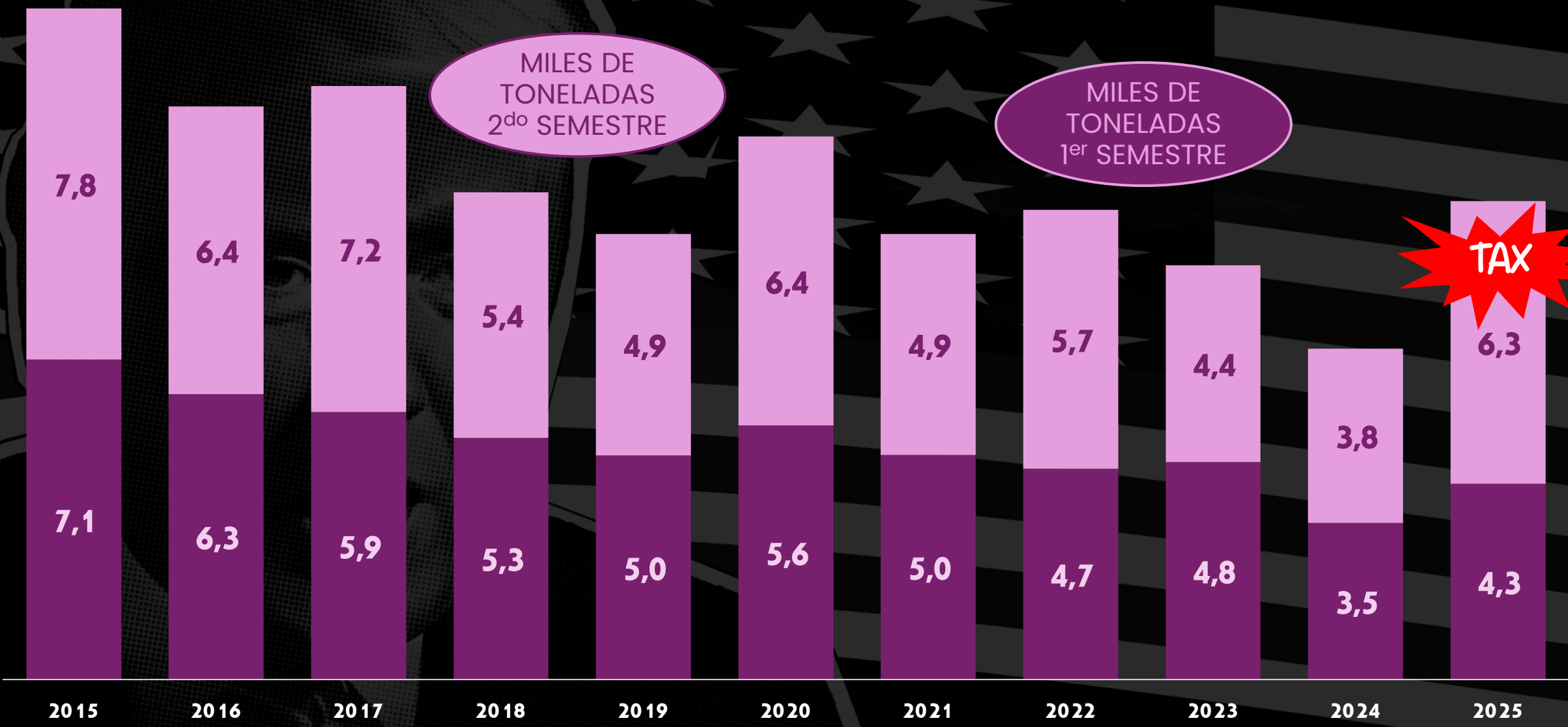
# % GENERACIÓN Z DE 18+ EN ALEMANIA



$$\beta_3 = -8,30$$

% por cada 1%

# IMPORTACIÓN POR SEMESTRE EN ALEMANIA



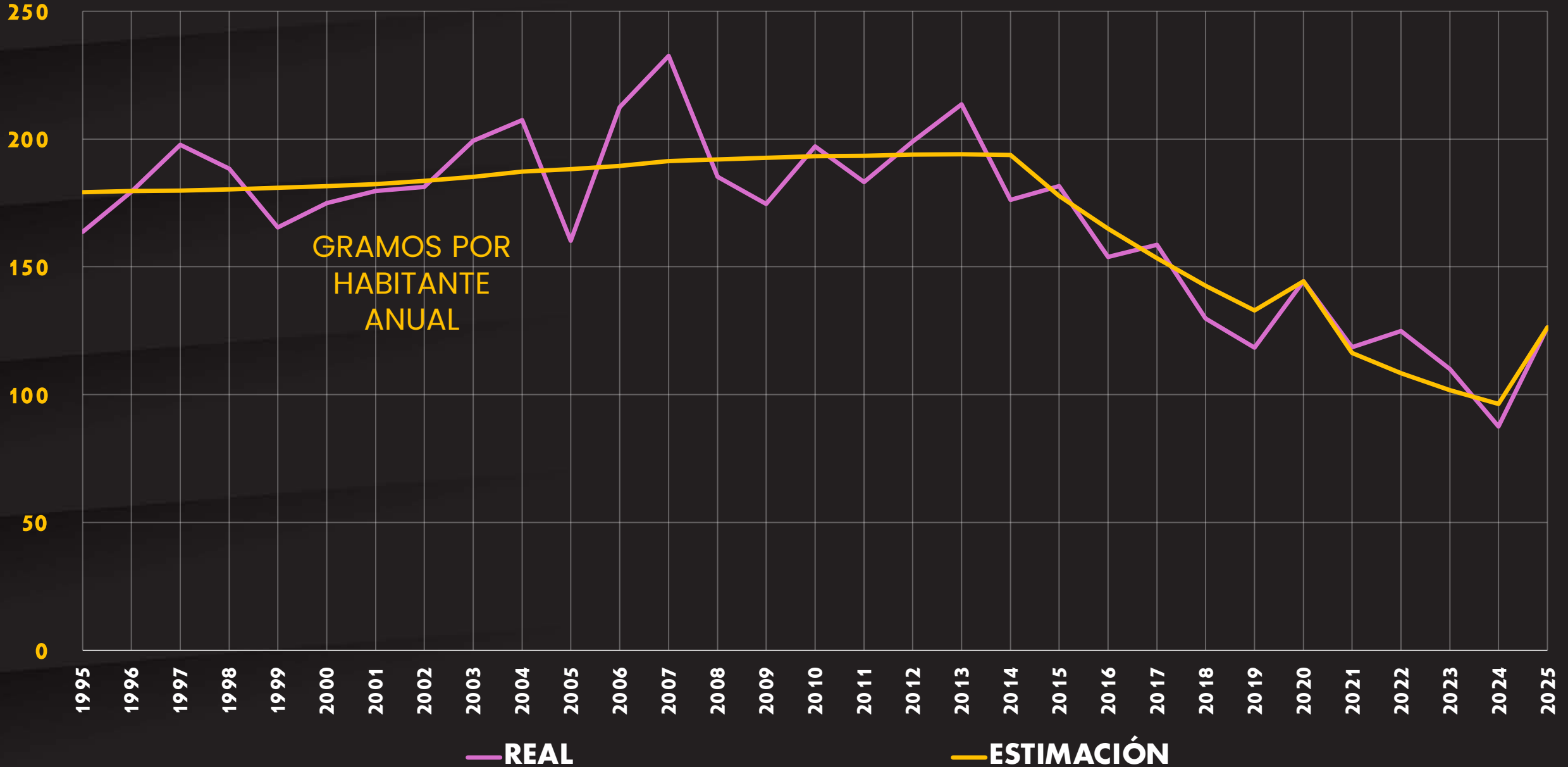
$$\beta_5 = +0,33$$

% el 2025

$$\ln CP = -1,80 + 1,49 POB_{+65} - 0,02 \ln P - 8,30 Z_{+18} + 0,15 COVID + 0,33 TAX$$

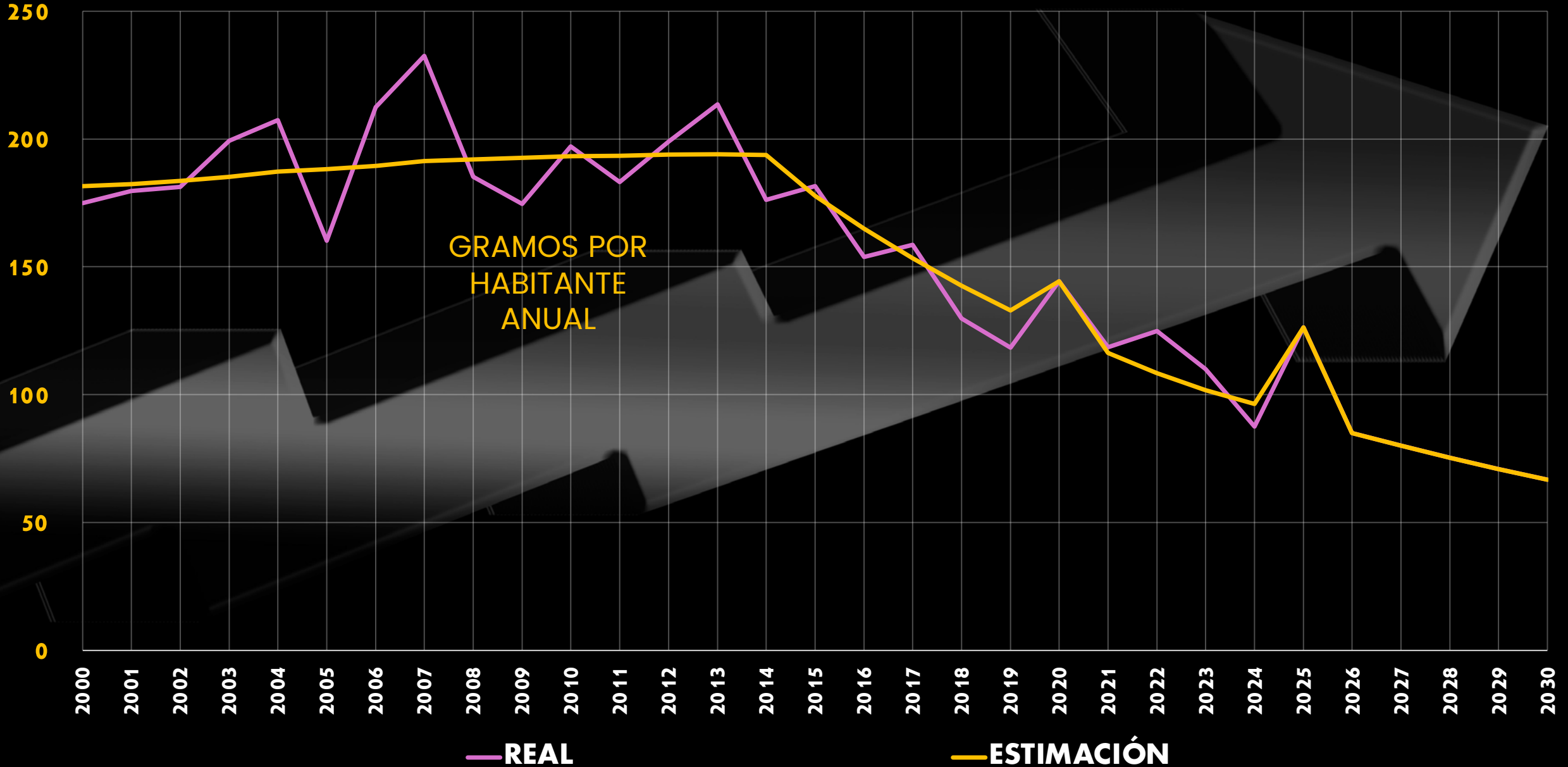
Variable	POB <sub>+65</sub>	Precio	GENZ <sub>+18</sub>	COVID	TAX
Beta	+1,49	-0,02	-8,30	+0,15	+0,33
Nivel	10,7%	89,9%	0,0%	15,0%	0,5%
Significativo	Poco significativo	Sin significancia	Muy significativo	Poco Significativo	Muy Significativo
Conclusión	El consumo sube mucho con la edad	El precio casi no influye en el consumo	Gran impacto de la Generación Z en el consumo (a la baja)	El COVID alteró el patrón de consumo	La expectativa de aranceles alteró el consumo

# ESTIMACIÓN DEL CONSUMO PERCÁPITA



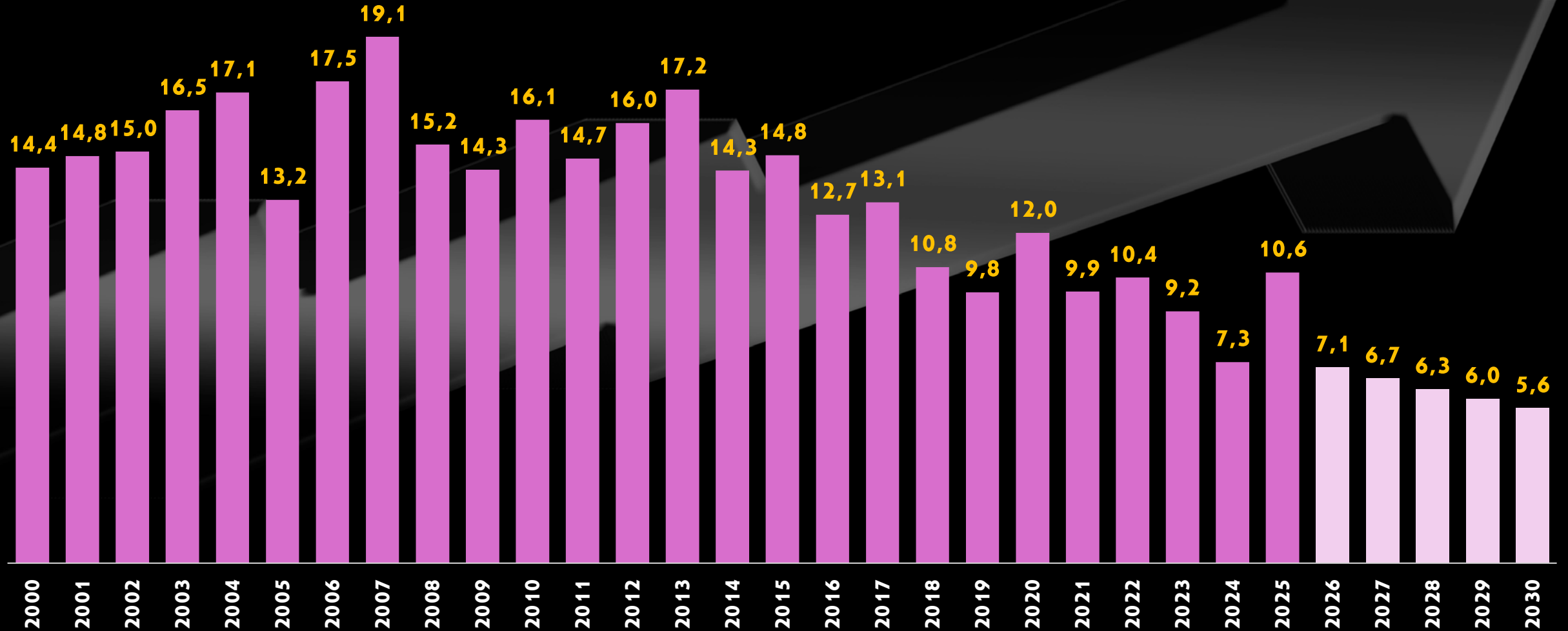
$R^2 = 84,1\%$

# PROYECCIÓN DEL CONSUMO PERCÁPITA

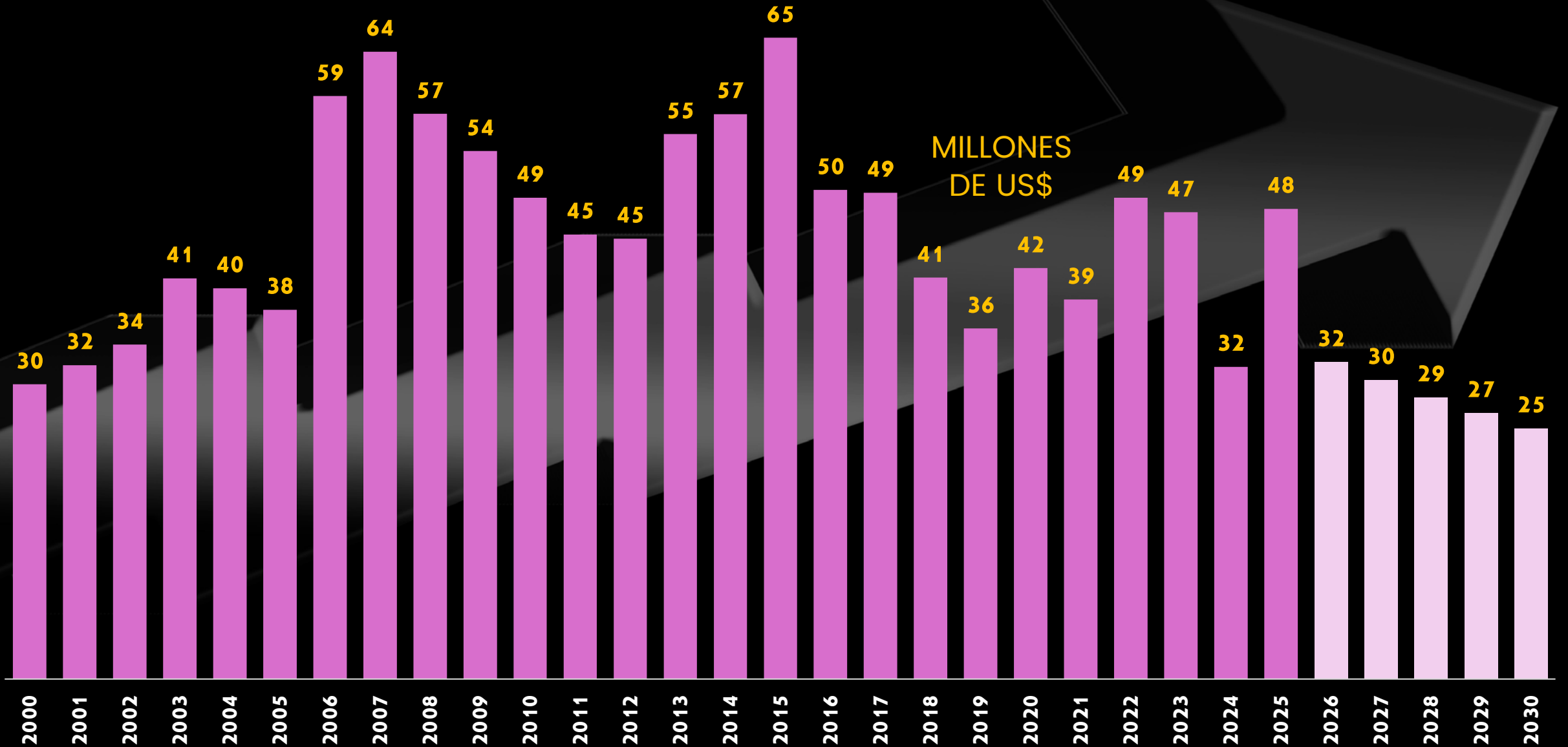


# IMPORTACIONES DE ALEMANIA EN TON.

MILES DE TON.



# IMPORTACIONES DE ALEMANIA EN US\$



Mercado	México	Polonia	Alemania
Precio	-0,55	-0,57	-0,02
PIB Perc.	+2,73	+2,63	-
POB <sub>+65</sub>	-	-	+1,49
M&Z <sub>+18</sub>	-0,88	-10,24	-8,30
COVID	+0,24	+0,23	+0,15
TAX	+0,17	+0,28	+0,33

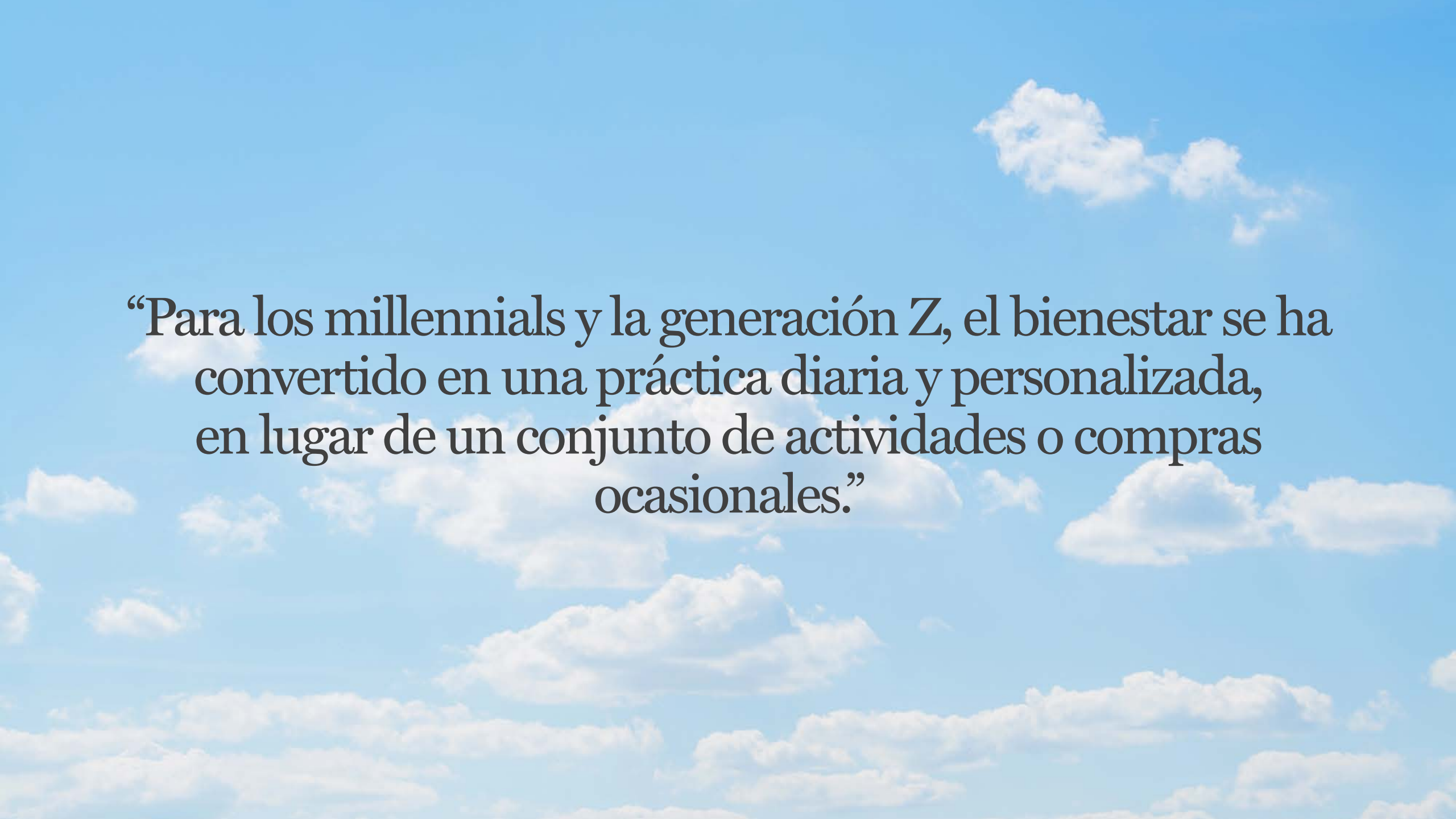
# Generación Z





McKinsey  
& Company

“Los consumidores más jóvenes están conceptualizando el bienestar de nuevas maneras...” (Mayo, 2025)



“Para los millennials y la generación Z, el bienestar se ha convertido en una práctica diaria y personalizada, en lugar de un conjunto de actividades o compras ocasionales.”



25% de la población  
40% del gasto en bienestar



“Buscan soluciones con respaldo científico y recurren al consejo médico, aunque también son más propensos a verse influenciados por las redes sociales que otros segmentos.”



“Priorizan la calidad sobre el precio, considerándola su principal factor de compra”

# La **nutrición funcional** es una de las seis áreas de crecimiento en la industria del bienestar

Nutrición Funcional

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Belleza

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Longevidad

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Experiencias presenciales y viajes de bienestar

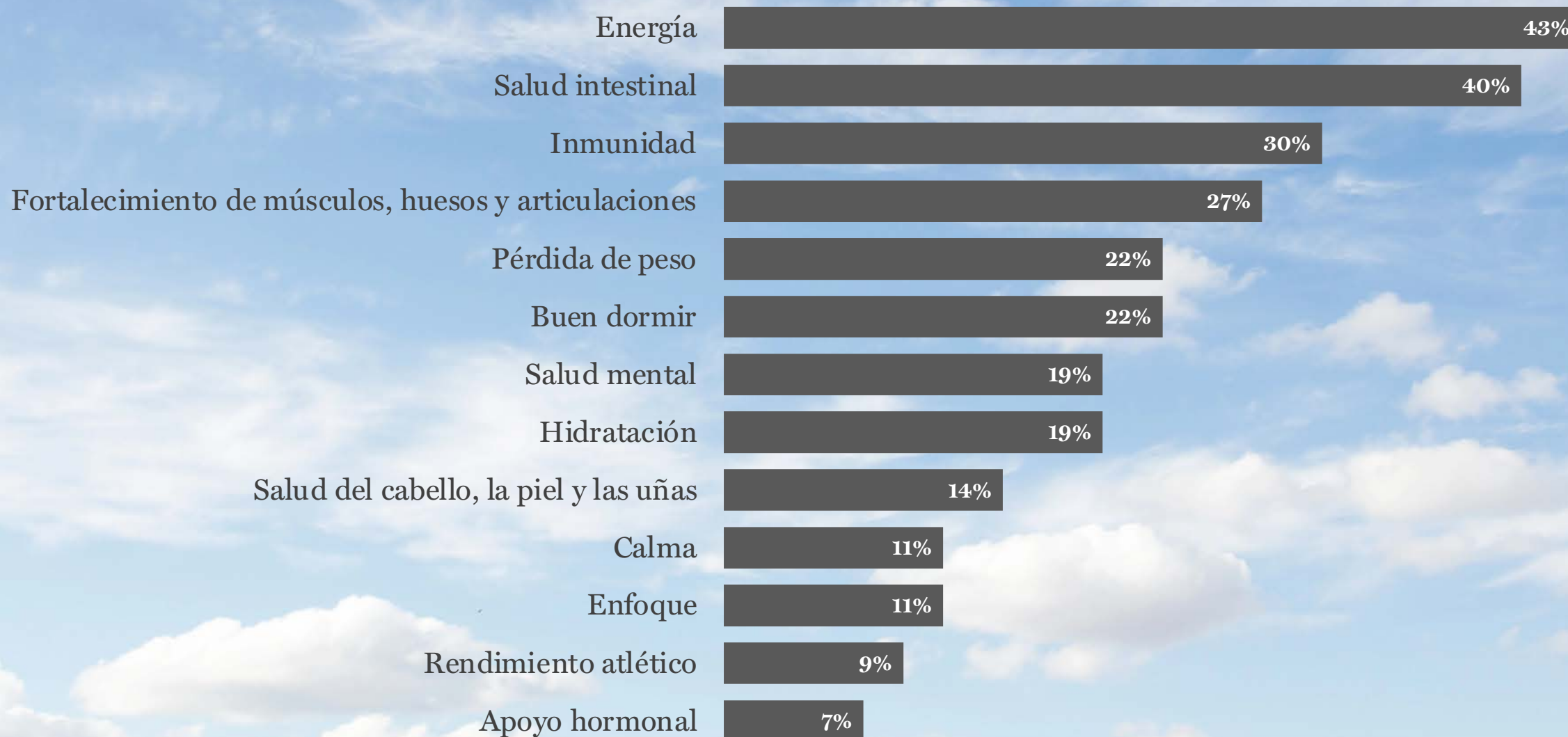
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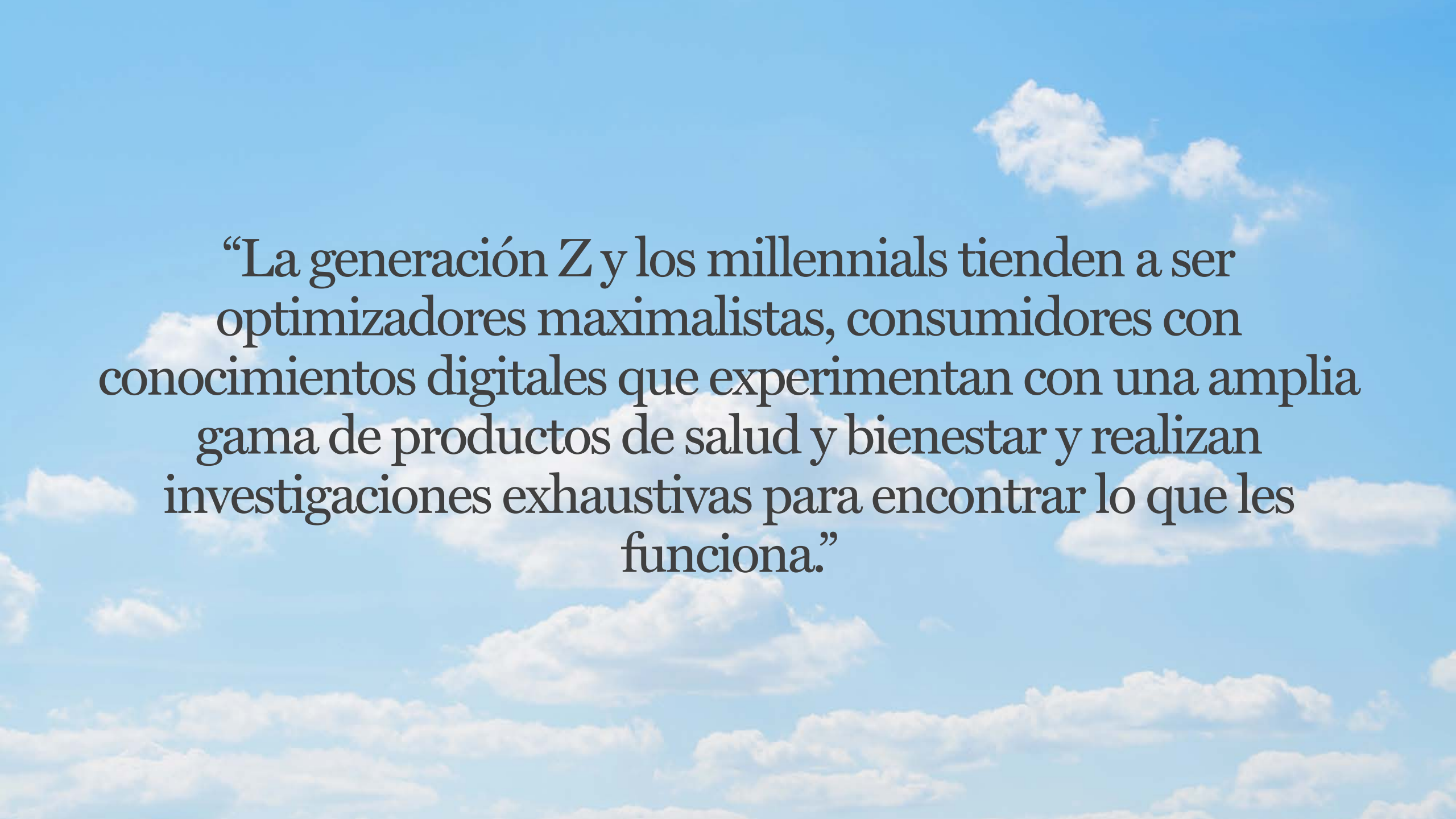
Manejo del peso

---

Salud mental

# ¿Qué se busca en la nutrición funcional?





“La generación Z y los millennials tienden a ser optimizadores maximalistas, consumidores con conocimientos digitales que experimentan con una amplia gama de productos de salud y bienestar y realizan investigaciones exhaustivas para encontrar lo que les funciona.”

Quiéren maximizar  
el impacto de lo que  
comen en su  
bienestar



# Nutrition Facts

1 serving per container  
Serving size 1/4 cup (40g)

Amount per serving  
**Calories 120**

% Daily Value\*

Total Fat 0g  
Saturated Fat 0g  
Unsaturated Fat 0g

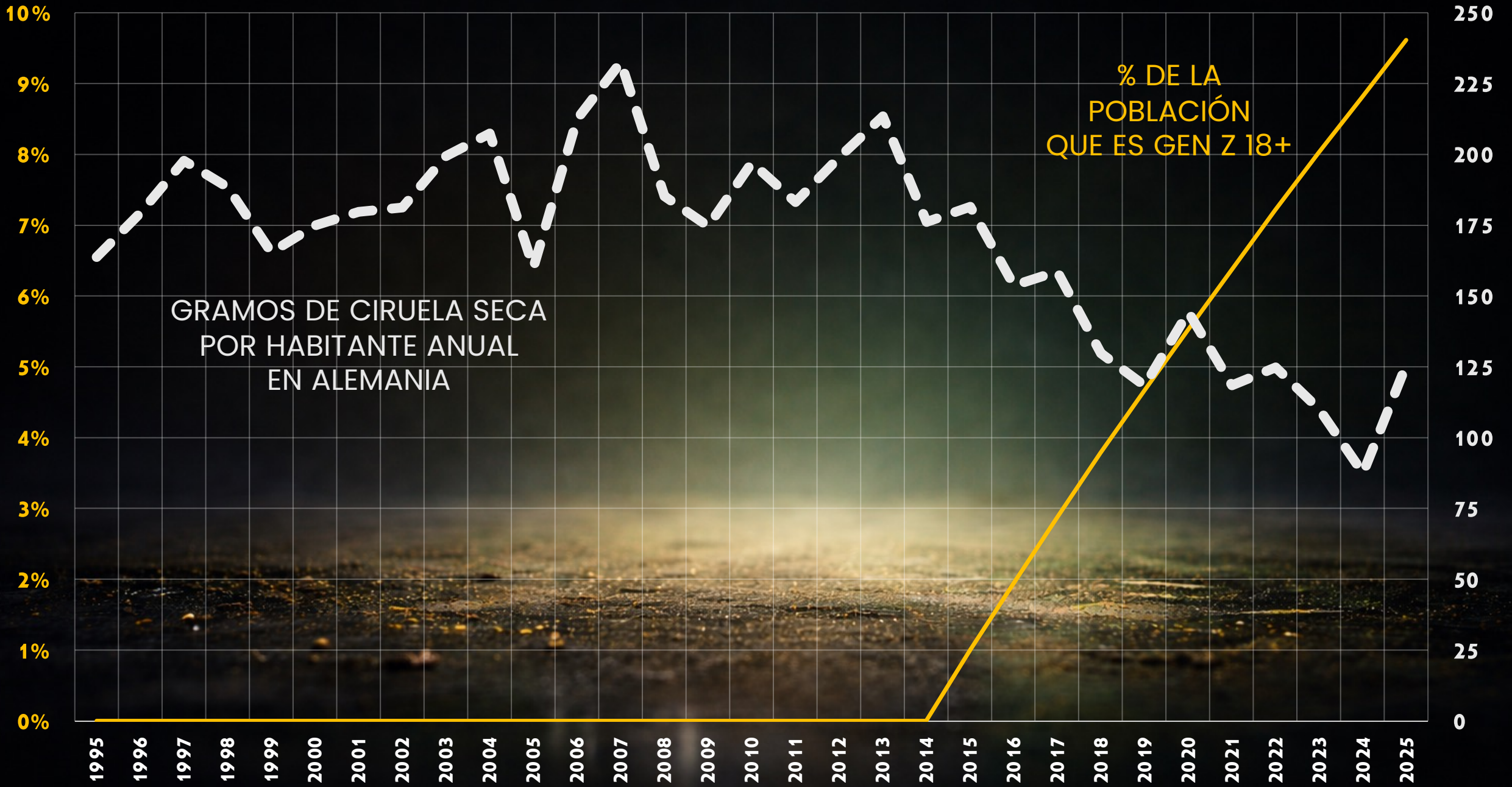


# ALIMENTOS SUPLEMENTO



¿COMPITE?







**¿Cómo hacemos para aumentar  
"sus ganas" de comer ciruela seca?**

# Entrar en su dieta diaria



**Entrar a  
competir por  
nutrición**

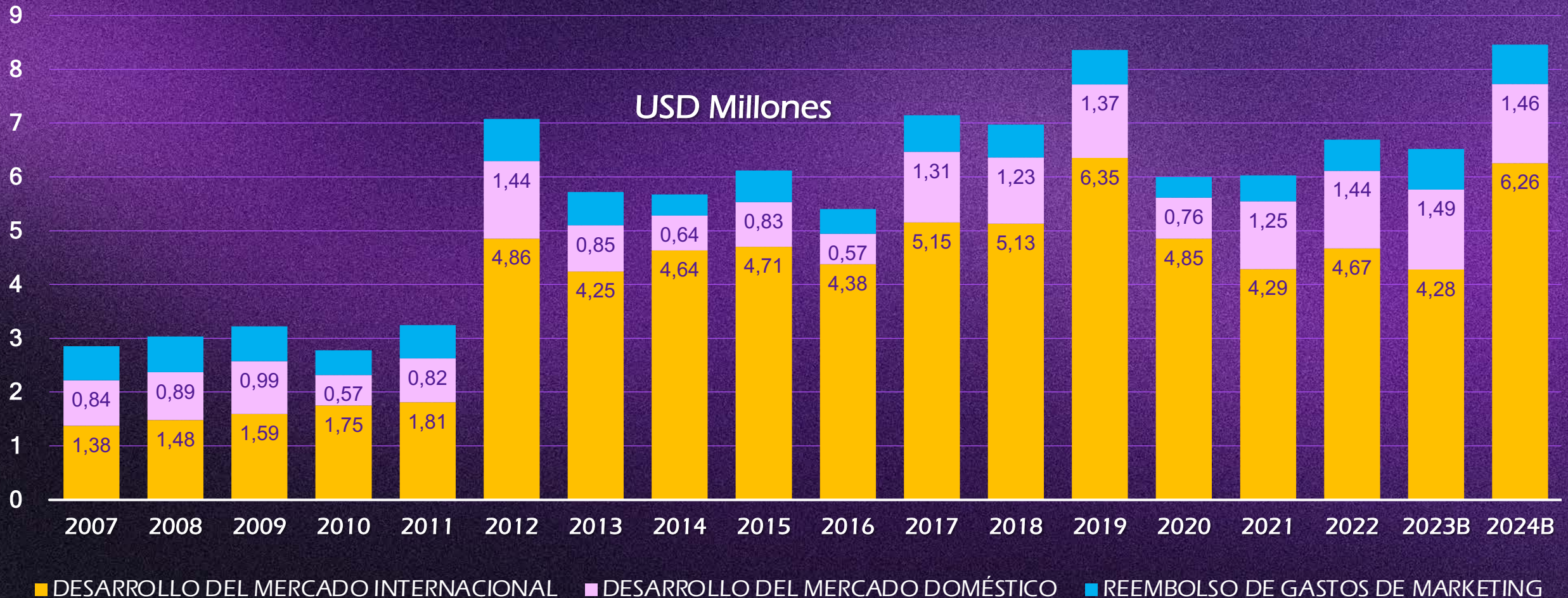
♦♦♦

**En un  
mercado  
adicto a la  
nutrición**





# En total, la CPB invierte entre US\$5,5 y US\$8,5 millones en actividades promocionales anualmente





*¿Cuál es nuestro camino?*

A serene sunset scene over a vast body of water. The sun is a bright, glowing orb positioned just above the horizon, partially obscured by a thin layer of dark clouds. The sky is a deep, warm orange, and the water below reflects the sun's light, creating a shimmering path of golden light. The word "FIN" is overlaid in the center of the image in a simple, dark, sans-serif font.

FIN