



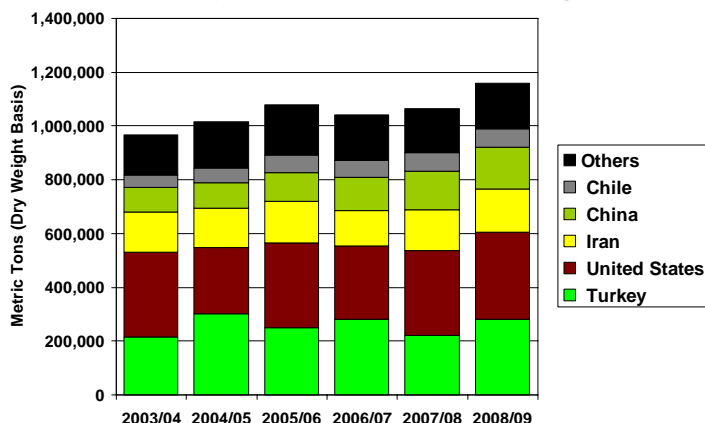
Raisins: World Markets and Trade

Raisins: 2008/09 Forecast Overview

- Raisin production forecast to reach 1.2 million metric tons

Raisin production for selected countries is forecast at almost 1.2 million metric tons (tons), up 100,000 tons from the previous year. Turkey is forecast to account for 60 percent of this growth as the country recovers from the previous year's drought. However, Turkey's exports are forecast to only rise 10,000 tons due to expected stock rebuilding efforts. This will provide an opportunity for China, Iran, and the United States to export their production growth rather than add to inventories.

Raisin Production Forecast to Expand as Turkey Recovers from Drought



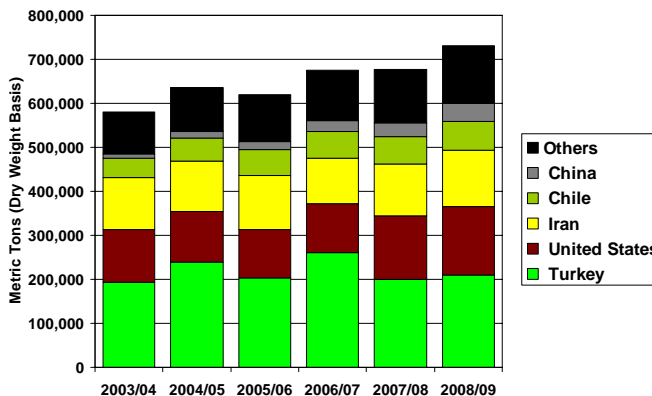
United States: Production is forecast to increase 3 percent to 325,000 tons in 2008/09. Grape bunch counts are up from a year ago and are reportedly in good condition. The 2007/08 estimate was upwardly revised 1,000 tons to 317,515 tons despite some frost damage from unusually cold temperatures in mid-April as well as lack of water for growers in the southern San Joaquin Valley.

Turkey: Production is forecast to rebound 27 percent to 280,000 tons in 2008/09 on expectations of favorable weather. Drought in 2007/08 caused production to plummet 21 percent to 220,000 tons. The size of the raisin growing area is forecast to remain the same. Seedless grapes, virtually all of which are the same genus and species as Thompson seedless grapes, constitute about 40 percent of the total grape crop and are grown only in the Aegean region. An estimated 65,000 growers produce seedless grapes on small farms averaging about 1.3 hectares.

- Raisin exports

Exports are forecast at 730,700 tons, an 8-percent increase over the previous year. Turkey, the United States, Iran, and China are expected

Top Three Raisin Exporters Plus China Account for 80 Percent of Growth

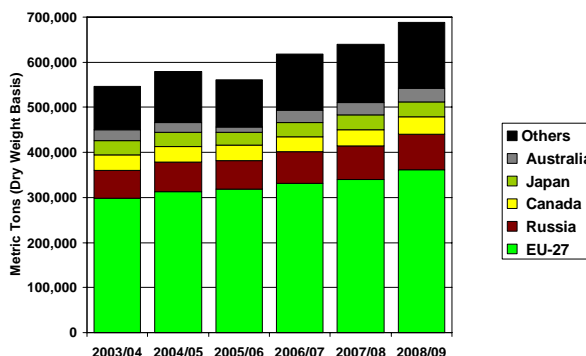


to expand exports by about 10,000 tons each and account for 80 percent of the year-over-year increase. Turkey's market share of exports decreased 9 percent in 2007/08 and is forecast to remain at last year's market share level due to inventory rebuilding. The United States, China, and Iran are forecast to capture Turkey's lost market share.

- **Raisin imports**

Imports are forecast at 687,900 tons, an 8-percent increase over the previous year. The European Union is the top raisin market and is forecast to account for 53 percent of total imports. Turkey is the key supplier to the EU market, but will likely see some of its market share erode due to lower exports. Other major import markets include Russia and Canada, forecast at 79,000 tons and 38,800 tons, respectively. Over the last several years, the relative importance of each import market has remained nearly unchanged.

EU Dominates Raisin Import Market



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Data Modifications

New countries have been added to the raisin Production, Supply and Distribution (PSD) database to reduce the gap between total imports and total exports by selected countries. These additional countries have data for 2003/04 to 2008/09 and are included in this report as well as in the PSD Online. As a result, any comparison between this and previous reports should take this modification into account.

Totals

USDA's official PSD database is composed of countries representing over 80 percent of the world's raisin situation. Since it represents all major raisin importers and exporters, it is an efficient forecasting basis for identifying world trends.

United States

Situational and outlook information used in this report for U.S. production can be obtained from the following locations:

http://usda.mannlib.cornell.edu/usda/current/NoncFruiNu/NoncFruiNu-07-08-2008_revision.pdf

http://usda.mannlib.cornell.edu/usda/current/CropProd/CropProd-08-12-2008_revision.pdf

PSD Online

Users can generate the full USDA PSD dataset for reporting countries by accessing:

<http://www.fas.usda.gov/psdonline/psdHome.aspx>

The release schedule for this annual report can be accessed at:

<http://www.fas.usda.gov/psdonline/psdSchedule.aspx>

FAS Reports from Overseas Offices

The *Raisins: World Markets and Trade* report is based on post reports submitted since July 2008 and on available secondary information. The individual reports can be obtained on FAS Online at:

<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>

Raisins: Total Production in Selected Countries
Metric Tons (Dry Weight Basis)

	2004/05	2005/06	2006/07	2007/08	2008/09	Sep 2009/10
Production						
Afghanistan	18,000	31,000	19,000	23,500	27,000	0
Algeria	0	0	0	0	0	0
Argentina	27,000	24,000	36,000	33,000	37,000	0
Australia	30,000	30,400	15,000	10,000	10,000	0
Brazil	0	0	0	0	0	0
Canada	0	0	0	0	0	0
Chile	55,900	65,500	61,500	67,350	69,000	0
China, Peoples Republic	95,000	105,000	125,000	145,000	155,000	0
EU-27	30,000	30,000	20,000	10,000	5,000	0
India	0	0	0	0	0	0
Iran	145,000	155,000	130,000	150,000	160,000	0
Japan	0	0	0	0	0	0
Mexico	7,500	8,200	8,500	8,500	8,500	0
Morocco	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
Russian Federation	0	0	0	0	0	0
South Africa, Republic of	30,416	36,000	41,832	40,201	40,300	0
Turkey	300,000	250,000	280,000	220,000	280,000	0
Ukraine	0	0	0	0	0	0
United States	248,569	316,245	274,877	317,515	325,000	0
Uzbekistan, Republic of	28,000	26,000	30,000	39,000	41,000	0
Total	1,015,385	1,077,345	1,041,709	1,064,066	1,157,800	0

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Raisin marketing year begins in August for northern hemisphere countries and January for southern hemisphere countries.
U.S. production data includes substandard raisins diverted to other uses.

Raisin Trade from Selected Countries
Metric Tons (Dry Weight Basis)

	2004/05	2005/06	2006/07	2007/08	2008/09	Sep 2009/10
Exports						
Afghanistan	14,350	25,000	15,000	19,000	21,500	0
Algeria	0	0	0	0	0	0
Argentina	22,000	19,100	28,900	26,400	30,000	0
Australia	6,450	7,650	5,700	4,000	3,900	0
Brazil	0	0	0	0	0	0
Canada	0	0	0	0	0	0
Chile	52,552	59,362	61,284	62,000	65,700	0
China, Peoples Republic	14,818	18,063	23,621	30,000	40,000	0
EU-27	9,525	8,700	8,625	7,500	8,000	0
India	0	0	0	0	0	0
Iran	114,900	122,800	103,000	118,000	129,000	0
Japan	0	0	0	0	0	0
Mexico	3,808	3,014	1,967	3,200	3,700	0
Morocco	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
Russian Federation	0	0	0	0	0	0
South Africa, Republic of	21,977	23,628	31,259	31,300	31,400	0
Turkey	240,000	203,000	260,000	200,000	210,000	0
Ukraine	0	0	0	0	0	0
United States	113,908	109,500	112,220	145,000	155,000	0
Uzbekistan, Republic of	22,400	20,475	23,675	31,325	32,500	0
Total	636,688	620,292	675,251	677,725	730,700	0
Imports						
Afghanistan	0	0	0	0	0	0
Algeria	7,125	6,600	7,650	8,425	9,400	0
Argentina	10	0	50	25	25	0
Australia	21,475	11,600	27,475	27,200	30,000	0
Brazil	14,725	17,150	19,175	22,000	25,000	0
Canada	34,300	34,000	32,800	36,000	38,800	0
Chile	0	0	0	0	0	0
China, Peoples Republic	12,188	10,391	12,262	13,500	15,000	0
EU-27	312,225	319,150	331,600	340,000	362,000	0
India	7,850	8,650	6,900	10,300	11,150	0
Iran	0	0	0	0	0	0
Japan	32,750	28,950	31,850	32,500	32,700	0
Mexico	13,227	11,690	14,342	14,000	16,000	0
Morocco	6,850	4,850	6,500	5,525	6,900	0
New Zealand	8,025	6,900	7,925	7,700	8,600	0
Russian Federation	66,000	62,600	70,325	74,500	79,000	0
South Africa, Republic of	923	416	17	10	10	0
Turkey	4,000	1,000	1,000	1,000	1,000	0
Ukraine	17,525	15,475	19,725	21,600	22,300	0
United States	20,113	21,614	28,868	25,000	30,000	0
Uzbekistan, Republic of	0	0	0	0	0	0
Total	579,311	561,036	618,464	639,285	687,885	0

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Raisin marketing year for producer countries begins in August for northern hemisphere countries and January for southern hemisphere countries.

Raisin marketing year for non-producer countries begins in August.

Intra-EU trade excluded from EU-27 data.