

Raisin Situation and Outlook

Production in major raisin-producing countries in the Southern Hemisphere is expected return to normal levels in Marketing Year (MY) 2001/02. Collectively, production in Australia, Chile, and South Africa is estimated to increase by 25 percent, from 89,176 tons to 111,000 tons. Exports in the Southern Hemisphere are also expected to increase by 14 percent in 2001/02. All major raisin-producing countries in the Northern Hemisphere are projected to decrease production in MY 2000/01. Total production from the United States, Greece, Turkey, and Mexico in MY 2001/02 is estimated to decrease by 12 percent. In the United States, raisin production is expected to decrease by 21 percent to reach 325,988 tons. Overall, raisin production for selected countries is projected to decrease by 19 percent.

Southern Hemisphere

Australia

In MY 2001 (March 2002/February 2003) raisin production numbers are forecast to rebound to 29,000 tons. Lower prices for grapes used for wine production in the past year have renewed interest in dried fruit production and are expected to encourage increased raisin production over the medium term. Due to a dramatic fall in production and unfavorable weather conditions, the MY 2000 (March 2001/February 2002) raisin crop is estimated to drop by more than 49 percent to 13,676 tons. In addition to unusually overcast and cooler conditions, the diversion of grapes away from raisin production in past years to wine manufacturing has cut the size of the raisin crop in half. Recent prices for sultanas are estimated at 1,600 Australian dollars per ton.

Raisin exports are estimated to increase by 18 percent in MY 2001 as a result of higher crop estimates. Due to the dramatic fall in production, Australian exports of sultanas are expected to decline in MY 2000 from 6,401 tons to 4,416 tons. During this downswing, maintaining major export markets such as Germany, New Zealand, Japan, Canada and the U.K. is expected to remain a priority for Australian exporters. Imports for MY 2001 are estimated to fall to 15,000 tons.

Chile

Raisin production for MY 2001 (January 2002 - December 2002) is forecast at 42,000 tons, a slight increase from the previous year. Decreased demand from the wine industry and larger supplies of table grapes from new vineyards is expected to increase 2000/2001 raisin production from 34,000

tons to 41,500 tons, a 22-percent increase from earlier estimates. Exports for MY 2001 are forecast at 38,400 tons. Key export markets for Chilean raisins are Mexico, the United States, Colombia, and Brazil. Export estimates for 2000/01 were revised up from the previous forecast to 38,400 tons due to a larger raisin crop. Prices for exported raisins are much higher than prices in the domestic market, leaving little incentive to produce for the local market. Chile did not import any raisins in 2000/01.

South Africa

Raisin production is expected to increase by 18 percent to 40,000 metric tons in MY 2001 (January 2002 - December 2002). In MY 2000, production is anticipated to have decreased by 11 percent from the previous year due to unfavorable weather conditions and diseases.

Exports during MY 2001 are forecast to increase by 36 percent to 28,500 metric tons. Brazil and the European Union are the largest export markets for South African raisins. Exporters are also looking to increase their markets in Japan and the United States.

Northern Hemisphere

Greece

The MY 2001 raisin crop (September 2001 - August 2002) is estimated at 27,000 tons, a decrease of 4 percent from the previous year. Approximately 80 percent of the crop is of excellent quality, graded at No. 2 and No. 4. The MY 2000 raisin crop has been revised from 29,000 tons to 28,000 tons. Large supplies of Turkish raisins have resulted in carry overs of approximately 9,000 tons from 2000 and 2001 crops. Four thousand of the 9,000 tons are expected to be consumed domestically.

Total export volume for 2001/02 is forecast at 23,000 tons. Raisin exports for 2000/01 are expected to fall to 21,500 tons, a 7-percent decrease from the previous year, due in large part to cheaper raisins on the international market from Turkey. Presently, export prices (FOB basis) for Greek sultanas fluctuate between 275-285 Drs/Kg (\$0.75 - \$0.78 kg) for grade No 2 and 265-275 Drs/Kg (\$0.72 - \$0.75/kg) for grade No 4. Prices for Turkish sultanas range between 185-195 Drs/kg (\$0.51 - \$0.53/kg). Raisin imports are minimal with 500 tons forecast for 2001/02.

Turkey

The revised raisin production forecast for MY 2001 (September 2001 - August 2002) is 190,000 tons, down 24 percent from earlier this year. Dry weather and diseases in some regions have reduced crop yields. The quality of the 2001/02 crop is not as good as the previous year, with 25 percent of the crop consisting of standard #10, 50 percent of standard #9 and the remaining 25 percent of #8 and lower. Raisin production in 2000/01 is estimated at a record 285,000 tons, a 46-percent increase from the previous year.

The raisin export forecast for 2001/02 is revised from 210,000 to 200,000 tons due to smaller supplies. Raisin export prices have been decreasing in recent years. Currently export prices for standard #9 bulk are at \$750/MT and \$800/MT for standard #10 bulk. In 2000/01, total raisin exports are estimated to be 232,317 tons, a 21-percent increase. Imports are minimal.

United States

According to the U.S. raisin industry, raisin production in MY 2001 (August 2001 - July 2002) is projected to reach 325,988 tons, down 21 percent from the record level of the previous year.

Exports are projected to increase by 10 percent in MY 2001. In MY 2000, raisin exports increased 36 percent from the previous year from 80,251 tons to 109,421 tons. The European Union, Japan and Canada remain top export markets. Imports from Chile and Mexico are expected to continue to increase in MY 2001.

In 2001/02, the Raisin Administrative Committee (RAC) received a total of \$1.9 million to market California raisins under the Market Access Program (MAP). MAP funds are expected to be used to maintain raisin markets in Japan, the United Kingdom and Scandinavia. In addition, the RAC received \$136,500 under the Emerging Markets Program to increase promotional activities in India, Poland, Czech Republic and Hungary.

Singapore

Singapore is one of the most affluent nations in Asia with a present GDP-per capita of about \$22,000. More than 76 percent of its population is in the middle to upper income groups. Singapore's market for dried fruit is supplied solely by imports (approximately \$14 million), of which raisins accounted for 51 percent of the total import value. The United States is the largest supplier of dried fruits to Singapore, accounting for 66 percent of the raisin market. Iran and South Africa are also major exporters. In 1999, the United States exported more than 4,000 tons of raisins to Singapore, of which 3,094 were re-exported.

The market for dried fruits in Singapore is expected to grow slowly; however, opportunities exist in the food service and retail sectors.

Taiwan

In 2000, 6,509 tons of dried fruits were imported into Taiwan, valued at \$10 million. Raisins accounted for 4,425 tons of the total imported dried fruits, of which 90 percent were imported from the United States.

Raisins are used both as snacks for consumers and ingredients for bakery stores. It is estimated that 60 percent of the imported raisins are consumed as snack products.

There are no quotas in effect for dried fruit imports. The current duty rate for bulk and boxed raisins is NT \$3/kg. The average wholesale price for raisins in 2000 is NT \$100/kg.

(The FAS Attache Report search engine contains reports on the Dried Fruit industries for 6 countries, including Australia, Chile and South Africa. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Kristin Kezar at 202-690-0556. Also, visit the dried fruit webpage at: <http://www.fas.usda.gov/htp/horticulture/driedfrt.html>)

RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION
Marketing Years 1997/98 - 2001/02
(Metric Tons)

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Exports	Domestic Consumption 2/	Ending Stocks
N O R T H E R N H E M I S P H E R E						
Greece						
1997/1998	3,930	38,000	2,000	37,000	4,000	2,930
1998/1999	2,930	28,000	4,000	24,000	4,500	6,430
1999/2000	6,430	22,500	1,000	23,000	4,500	2,430
2000/2001	2,430	28,000	1,000	21,500	4,000	5,930
2001/2002	5,930	27,000	500	23,000	9,000	1,430
Turkey						
1997/1998	15,273	240,000	3,090	192,770	37,000	28,593
1998/1999	28,593	250,000	3,131	188,247	30,000	63,477
1999/2000	63,477	195,000	1,550	192,433	30,000	37,594
2000/2001	37,594	285,000	1,000	210,000	30,000	61,277
2001/2002	61,277	190,000	1,000	200,000	30,000	22,277
Mexico						
1997/1998	0	18,000	6,130	7,265	16,865	0
1998/1999	0	20,000	4,474	13,142	11,332	0
1999/2000	0	12,000	8,278	7,783	12,495	0
2000/2001	0	16,000	8,000	7,500	16,500	0
2001/2002	0	15,000	7,000	9,000	13,000	0
United States						
1997/1998	89,940	388,729	11,194	120,433	223,157	146,273
1998/1999	146,273	251,290	24,579	110,591	213,341	98,210
1999/2000	98,210	310,653	17,370	80,251	220,761	125,221
2000/2001	125,221	412,770	11,000	115,000	239,272	194,719
2001/2002*	194,719	325,988	N A	N A	N A	N A
Total Northern Hemisphere						
1997/1998	109,143	684,729	22,414	357,468	281,022	177,796
1998/1999	177,796	549,290	36,184	335,980	259,173	168,117
1999/2000	168,117	540,153	28,198	303,467	267,756	165,245
2000/2001	165,245	741,770	21,000	354,000	289,772	261,926
2001/2002	261,926	557,988	8,500	232,000	52,000	23,707
S O U T H E R N H E M I S P H E R E						
Australia						
1997/1998	4,000	38,500	11,481	14,485	32,196	7,300
1998/1999	7,300	21,119	16,885	5,599	35,105	4,600
1999/2000	4,600	26,667	17,353	6,401	35,300	6,919
2000/2001	6,919	13,676	17,400	4,416	32,579	1,000
2001/02	1,000	29,000	15,000	5,200	35,000	4,800
Chile						
1997/1998	3,041	27,820	0	27,017	3,500	344
1998/1999	344	36,000	0	32,563	3,500	281
1999/2000	281	45,000	0	41,576	3,500	281
2000/2001	281	41,500	0	38,000	3,500	181
2001/02	205	42,000	0	38,400	3,500	305
South Africa; Republic of						
1997/1998	10,306	27,063	0	20,200	11,425	5,744
1998/1999	5,744	40,358	0	28,214	12,600	5,288
1999/2000	5,288	38,142	1	24,670	13,000	5,761
2000/2001	5,761	34,000	1	21,000	13,000	5,762
2001/02	9,506	40,000	1	28,500	13,500	7,507
Total Southern Hemisphere						
1997/1998	17,347	93,383	11,481	61,702	47,121	13,388
1998/1999	13,388	97,477	16,885	66,376	51,205	10,169
1999/2000	10,169	109,809	17,354	72,647	51,800	12,961
2000/2001	12,961	89,176	17,401	63,416	49,079	6,943
2001/02	10,711	111,000	15,001	72,100	52,000	12,612
Grand Total						
1997/1998	126,490	778,112	33,895	419,170	328,143	191,184
1998/1999	191,184	646,767	53,069	402,356	310,378	178,286
1999/2000	178,286	649,962	45,552	376,114	319,556	178,206
2000/2001	178,206	830,946	38,401	417,416	338,851	268,869
2001/2002	272,637	668,988	23,501	304,100	104,000	36,319

1/ Northern Hemisphere marketing years begin August 1, and September 1 in Turkey. Marketing years for Southern Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, and March 1 in Australia
2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ imports include currants
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4/ *Industry Estimate

U.S. EXPORTS OF RAISINS
Complete Marketing Year (August/July) 1998/99 - 2000/01
and 1999/00-2000/01 August/July Comparisons
(Metric Tons)

Destination	1998/99	1999/00	2000/1	Percent Changed
North America				
Canada	12,121	10,723	11,793	10%
M exico	896	1,173	644	-45%
Subtotal	13,017	11,896	12,437	5%
European Union				
Sweden	4,368	3,527	4,805	36%
Finland	2,270	1,725	1,614	-6%
Denmark	5,148	3,797	3,871	2%
United Kingdom	22,195	11,439	24,174	111%
Netherlands	3,471	2,794	5,569	99%
France	669	625	275	-56%
Germany	5,092	3,280	7,195	119%
Spain	587	499	505	1%
Belgium-Lux.	926	708	889	26%
Italy	220	117	320	174%
Ireland	243	75	78	4%
Subtotal	45,189	28,586	49,295	72%
Asia				
Singapore	2,776	1,919	2,104	10%
M alaysia	686	557	927	66%
Korea, Republic of	1,654	1,122	2,304	105%
Hong Kong	1,763	1,378	2,436	77%
Taiwan	3,887	2,697	3,835	42%
Jap an	30,014	23,224	22,905	-1%
Subtotal	40,780	30,897	34,511	12%
Other Countries				
New Zealand	1,312	988	1,319	34%
Norway	2,309	2,045	2,384	17%
All Others	7,984	5,839	9,475	62%
Grand Total	110,591	80,251	109,421	36%

Source: U.S. Bureau of the Census