

World Raisin Situation and Outlook

Raisin production in selected countries in the Northern Hemisphere is expected to decline in 2001/02 (September 2001 - August 2002). Total production in Turkey and Mexico is projected to decrease by 2 percent compared to the previous year. Raisin production in Greece is expected to remain the same at 26,000 tons. 2001/02 raisin exports from Greece, Turkey, and Mexico are expected to slightly increase by 1 percent. U.S. raisin exports are expected to fall, primarily due to lower-priced competition from Turkey and Greece. Raisin production in selected countries in the Southern Hemisphere (Australia and South Africa) is projected to decline by 75 percent in 2001. In addition, raisin exports from these countries are expected to drop by 20 percent as a result of lower production levels and depressed market prices.

Northern Hemisphere

Greece

The 2000/01 raisin crop (September 2000 - August 2001) has been revised upward to 29,000 tons, an increase of 29 percent from the previous year. Unlike the 1999 season, normal temperatures prevailed, resulting in a larger harvest and production of better quality produce. The 2001/02 production level is expected to increase slightly.

Raisin exports are expected to increase by 4 percent from 24,000 tons in 2000/01 to 25,000 tons in 2001/02. Germany is the largest market for exported raisins originating from Greece, followed closely by the Czech Republic, Australia, and Canada. Raisin imports into Greece are minimal (500 tons in MY 2000).

Turkey

Raisin production for 2000/01 increased by more than 31 percent, primarily because of the allure of higher export prices. Production levels, however, are expected to slightly decrease in 2001/02 given the recent downward trend of export prices.

The recent devaluation of the Turkish Lira spurred raisin exports to record levels in 2000/01, from 192,433 tons to 210,000 tons. The United Kingdom, Germany, the Netherlands and Italy are the leading export markets for raisin exports originating from Turkey. Turkey applies a 56.7 duty on imported raisins, primarily to protect its domestic industry.

Mexico

Although raisin production in 2000/01 increased from the previous year, economic uncertainty and limited water supplies have led to a lower production forecast for 2001/02 from 16,000 tons to 15,000 tons. Lack of credit availability has also impeded growers' ability to expand production.

Lower international prices and a surplus supply of raisins on the global market slightly decreased Mexico's raisin exports by 3 percent from 7,783 tons to 7,500 tons in 2000/01. Nevertheless, raisin exports are forecasted to increase by 20 percent in 2001/02. The United States remains Mexico's largest export market for raisins. Chile accounted for 86 percent of the total raisin imports into Mexico in 2000/01.

United States

Raisin production reached record levels in 2000/01 from 310,653 tons to 412,770 tons, a 33- percent increase from the previous year. Large stock levels and depressed prices are expected to lower the production level in 2001/02.

Raisin exports are expected to rebound in 2000/01 reaching 115,000 tons. Year to date (August 2000 - April 2001) raisin exports are 84,348 tons. 2001/02 exports are projected to decline as surplus supply of cheaper raisins from lower-cost international producers inundate the global market. Japan, the United Kingdom, Canada, Sweden, and Denmark remain major markets for U.S. raisins.

For the 2001/02, the Raisin Administrative Committee (RAC) has received a budget ceiling of \$1.78 million to market California raisins under the Market Access Program (MAP). Japan, the United Kingdom, and Scandinavia continue to be RAC's largest target markets, although funding has also been requested for markets in the East Asia Region. MAP funds will be used to convince consumers to purchase California raisins based on their high quality and nutritional levels. The requested funding will also be used to help convince retailers, bakeries and the food service industry to buy California raisins for their value added properties. The RAC also requested Emerging Markets Program funding for activities in India and Eastern Europe. These proposals are under consideration.

Southern Hemisphere

Australia

The 2001/02 raisin production (March 2001 - February 2002) is projected to fall by more than 45 percent from 26,667 tons to 14,500 tons. Cooler conditions have contributed to the production decrease. Industry analysts also suspect that part of the decline may be due to the diversion of grapes from fruit to

wine production.

Smaller production levels and competition from lower priced products have resulted in a 38-percent drop in exports. This declining trend in exports is expected to continue into 2001/02. Germany, the United Kingdom and Canada are the largest export markets for Australia's raisins.

Turkey remains the dominant raisin supplier to Australia.

South Africa

Raisin production is expected to fall by 11 percent in 2001 (January 2001 - December 2001) as a result of Downy Mildew disease and warmer climate conditions. Production levels are forecast down from 38,142 tons to 34,000 tons.

Raisin exports during the same period are expected to drop by 15 percent to 21,000 tons. The United States, Brazil, Germany, France and the Netherlands are the leading raisin markets for South Africa's raisin exports. In 2001, exports are expected to further decrease as a result of an increase in domestic demand and lower world prices.

The Agricultural Product Marketing Act of 1997 liberalized the South African raisin market, thus, the domestic and international sales of raisins operate under a free marketing system.

(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.)

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

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports ^{2/}	Exports	Domestic Consumption ^{3/}	Ending Stocks
NORTHERN HEMISPHERE						
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	29,000	500	24,000	4,000	3,930
2001/2002 4/	3,930	30,000	350	25,000	4,000	5,280
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	255,000	1,000	210,000	30,000	53,594
2001/2002 4/	53,994	250,000	0	210,000	30,000	63,594
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 4/	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	N A	N A	N A	N A	N A	N A
Total Northern Hemisphere						
1997/1998	109,143	684,729	22,414	357,649	281,022	177,796
1998/1999	177,796	549,290	36,184	335,980	259,173	168,117
1999/2000	169,664	540,153	28,198	303,467	267,756	165,245
2000/2001	164,942	712,770	20,500	356,500	289,772	252,243
SOUTHERN HEMISPHERE						
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 4/	6,919	14,500	19,000	4,000	34,419	2,000
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	35,000	0	31,500	3,500	281
2000/2001 4/	281	34,000	0	30,500	3,600	181
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 4/	5,761	34,000	1	21,000	13,000	5,762
Total Southern Hemisphere						
1997/1998	17,347	93,983	11,481	61,702	47,121	13,388
1998/1999	13,388	97,477	16,885	66,376	49,205	10,169
1999/2000	10,169	99,809	17,354	62,571	51,800	12,961
2000/2001 4/	12,961	82,500	19,001	55,500	51,019	7,943
Grand Total						
1997/1998	126,490	778,112	33,895	419,351	328,143	191,184
1998/1999	191,184	646,767	53,069	402,356	308,378	178,286
1999/2000	178,286	639,962	45,552	366,038	319,556	178,206
2000/2001 4/	177,903	795,270	39,501	412,000	340,791	260,186

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/ Imports include currants. U.S. production data has been converted to a packed weight basis in order to align it with other supply and distribution statistics. 3/ Domestic consumption figures include raisins for feed and distillation purposes. 4/ FAS Estimates

U.S. EXPORTS OF RAISINS
Complete Marketing Year (August/July) 1997/98 - 1999/00
and 1999/00-2000/01 August/April Comparisons
(Metric Tons)

Destination	1997/98	1998/99	1999/00	August/ 1999/00	April 2000/01	Percent Changed
North America						
Canada	11972	12121	10723	8194	9193	12%
Mexico	1167	896	1173	935	614	-34%
Subtotal	13,139	13,017	11,896	9,129	9,807	7%
European Union						
Sweden	4693	4368	3527	2910	3780	30%
Finland	2119	2270	1725	1406	1371	-2%
Denmark	5469	5148	3797	2476	2984	21%
United Kingdom	26270	22195	11439	7506	18534	147%
Netherlands	3820	3471	2794	2125	4344	104%
France	679	669	625	482	178	-63%
Germany	7191	5092	3280	2113	5257	149%
Spain	666	587	499	326	332	2%
Belgium-Lux.	1430	926	708	528	748	42%
Italy	142	220	117	17	299	1659%
Ireland	142	243	75	46	52	13%
Subtotal	52,621	45,189	28,586	19,935	37,879	90%
Asia						
Singapore	2585	2776	1919	1461	1719	18%
Malaysia	1209	686	557	387	580	50%
Korea, Republic of	2175	1654	1122	898	1878	109%
Hong Kong	4344	1763	1378	983	2110	115%
Taiwan	4539	3887	2697	1978	3114	57%
Japan	23636	30014	23224	18820	17079	-9%
Subtotal	38,488	40,780	30,897	24,527	26,480	8%
Other Countries						
New Zealand	1269	1312	988	674	993	47%
Norway	1993	2309	2045	1571	1859	18%
All Others	12923	7984	5839	4950	7330	48%
Grand Total	120,433	110,591	80,251	60,786	84,348	39%

Source: U.S. Bureau of the Census

U.S. IMPORTS OF RAISINS
Complete Marketing Year (August/July) 1997/98 - 1999/00
and 1999/00-2000/2001 August/March Comparisons
(Metric Tons)

Origin	1997/98	1998/99	1999/2000	August/ April		Percent Changed
				1999/00	2000/2001	
Mexico	6,611	11,070	6,305	6,000	3,067	-49%
Chile	2,151	4,362	5,747	2,300	2,370	3%
Argentina	414	1,799	2,488	1,037	707	-32%
South Africa	1,080	963	1,286	776	853	10%
Pakistan	329	349	608	472	199	-58%
Turkey	191	1,412	368	368	32	-91%
Afghanistan	351	4,287	419	417	17	-96%
Greece	4	209	51	31	0	-100%
Leeward-Windward	0	0	41	41	0	-100%
Canada	1	0	31	5	0	-100%
United Arab Emirates	38	0	16	16	42	163%
Lebanon	0	0	1	1	4	300%
Australia	0	2	0	0	0	0%
Others	24	306	0	0	0	0%
Grand Total	11,194	24,759	17,361	11,464	7,291	-36%

Source: U.S. Bureau of the Census