

RAISINS, PRUNES & CRANBERRIES ROUND TABLE



INC XL WORLD NUT AND
DRIED FRUIT CONGRESS
MAY 22-24, 2023

Program

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 - Production Trends
 - Consumption Trends
 - Commodity Trends
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Panel

- Chair: **Brad Schuler**, Vice President and COO, Sunsweet Growers, USA
- **Emrah Yasar**, Partner and Managing Director, VESTA, Türkiye
- **Donn Zea**, Executive Director, California Prune Board, USA
- **Jose Tomas Quezada**, Commercial Manager, Pacific Nuts & Dried Fruits, Chile
- **Dirk Schmidt**, CEO and Partner, Bösch Boden Spies, Germany

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Program

Commodity Tables



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ESTIMATED WORLD RAISIN/SULTANA/CURRANT PRODUCTION

Metric Tons

COUNTRY	2022/2023				2023/2024			
	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK
TÜRKIYE	50,000	320,000	370,000	55,000	55,000	310,000	365,000	50,000
CHINA	20,000	180,000	200,000	10,000	10,000	180,000	190,000	10,000
USA	56,000	170,000	226,000	70,000	70,000	180,000	250,000	60,000
IRAN	3,000	180,000	183,000	30,000	30,000	150,000	180,000	30,000
INDIA	0	145,000	145,000	7,000	7,000	140,000	147,000	2,000
SOUTH AFRICA	7,430	62,700	70,130	14,000	14,000	66,000	80,000	4,000
UZBEKISTAN	0	70,000	70,000	0	0	60,000	60,000	0
CHILE	5,000	60,000	65,000	7,000	7,000	55,000	62,000	0
AFGHANISTAN	0	28,000	28,000	0	0	28,000	28,000	0
ARGENTINA	500	35,000	35,500	1,000	1,000	21,000	22,000	0
GREECE	2,500	21,000	23,500	5,000	5,000	15,000	20,000	2,000
AUSTRALIA	1,500	15,000	16,500	0	0	8,000	8,000	0
OTHERS	0	20,000	20,000	0	0	20,000	20,000	0
WORLD TOTAL	145,930	1,306,700	1,452,630	199,000	199,000	1,233,000	1,432,000	158,000

WORLD CONSUMPTION (T. Supply - End. Stock) 1,253,630

Sources: Aegean Exporters Association, Iran Dried Fruit Exporters Association, Raisins South Africa, Greek Nuts & Fruits Trade Association, USDA, Dried Fruits Australia, 2021 International Seedless Dried Grape Producing Countries Conference and other INC sources.

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ESTIMATED WORLD PRUNE PRODUCTION

Metric Tons

COUNTRY	2022/2023				2023/2024			
	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK
USA	33,764	62,000	95,764	33,000	33,000	68,000	101,000	25,000
CHILE	4,000	67,896	71,896	5,000	5,000	68,960	73,960	0
ARGENTINA	3,000	18,000	21,000	3,000	3,000	25,000	28,000	4,000
FRANCE	20,331	16,615	36,946	13,500	13,500	40,000	53,500	23,500
SERBIA	1,000	5,000	6,000	1,000	1,000	5,000	6,000	1,000
AUSTRALIA	0	2,700	2,700	0	0	2,500	2,500	0
ITALY	300	1,860	2,160	500	500	1,400	1,900	0
SOUTH AFRICA	0	800	800	0	0	800	800	0
WORLD TOTAL	62,395	174,871	237,266	56,000	56,000	211,660	267,660	53,500

WORLD CONSUMPTION (T. Supply - End. Stock)	181,266
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Sources: California Prune Board, Chile Prunes Association and other INC sources.

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ESTIMATED WORLD SWEETENED DRIED CRANBERRY PRODUCTION

Metric Tons

COUNTRY	2022/2023				2023/2024			
	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	PRODUCTION	TOTAL SUPPLY	ENDING STOCK
USA	2,161	144,612	146,773	2,541	2,541	127,234	129,775	4,490
CANADA	1,124	40,121	41,245	1,762	1,762	57,834	59,596	2,041
CHILE	289	10,103	10,392	347	347	7,711	8,058	273
WORLD TOTAL	3,574	194,836	198,410	4,650	4,650	192,779	197,429	6,804

WORLD CONSUMPTION (T. Supply - End. Stock)	193,760
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The cranberry crop is harvested in the fall. End of year statistics are measured as of August, 31. 2023/2024 represents the estimate of production and supply through August 31, 2024.

Summary & Conclusion

RAISINS:

Estimated Global production is slightly down (-5%) versus prior year. Weather challenges impacting crops in most producing countries to varying levels with the exceptions being the USA and China that are experiencing favorable weather conditions. Overall Global Supply is projected to be in balance with slightly lower ending stocks.

PRUNES:

Estimated Global production is higher (+20%) versus prior year. Normalized crops projected in all producing countries with rebounding crops from lower production in France and Argentina the prior year. Overall Global Supply is projected to be in lower than prior 5-year average for both Production and Demand. This will cause slightly lower ending stocks.

CRANBERRIES:

Estimated Global production is flat (-1%) versus prior year. Normalized crops projected in all producing countries. Overall Global Supply is projected to be in balance with slightly higher ending stocks.



Program

Panel Discussion:

- Production Trends
- Consumption Trends
- Commodity Trends



Program

Audience Questions



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