Raisin Administrative Committee

Marketing Policy & Industry Statistics
2017 - 2018 Marketing Season

As Presented to the Marketing Subcommittee
and Approved by the RAC on October 12, 2017
and Submitted to the Secretary

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(1) THE ESTIMATED TONNAGE HELD AT THE BEGINNING OF THE CROP YEAR.

(A) Tonnage held by producers.

6,735 tons of Natural Seedless raisins were being held on Memorandum Storage as of July 31, 2017.

(B) Tonnage held by handlers.

Packer inventory of raisins as of July 31, 2017, with comparative tonnages for July 31, 2016 was as follows:

	*PACKER INVENTORY * as of 07/31/16 Held Locally*	*PACKER INVENTORY * as of 07/31/17 Held Locally*
Natural Seedless	**158,287**	**121,135**
Dipped Seedless	**953**	**1,290**
Golden Seedless	**6,584**	**6,224**
Zante Currant	**1,991**	**1,666**
Sultana	**18**	**6**
Muscat	**24**	**24**
Monukka	**171**	**114**
Other Seedless	**7,497**	**6,289**
Other Seedless Sulfured	**653**	**948**
TOTAL	**176,178**	**137,696**

** Includes packed and unpacked in sweatbox tons*

10 Year Natural Seedless Carry-in Inventory (Free Tonnage & Unreleased Reserve)

	Free Tonnage	Unreleased Reserve	Total
2008-09	106,249	647	106,896
2009-10	126,824	12,154	138,978
2010-11	83,143	71	83,214
2011-12	110,206	2	110,208
2012-13	132,061	0	132,061
2013-14	132,407	0	132,407
2014-15	138,215	0	138,215
2015-16	122,954	0	122,954
2016-17	158,287	0	158,287
2017-18	121,135	0	121,135
10 Year Average	***123,148***	***1,287***	***124,436***

(C) Estimated tonnage held by Committee as of August 1, 2017.

The Committee held 0 tons of Natural Seedless reserve pool raisins.

(2) THE EXPECTED GENERAL QUALITY AND ANY MODIFICATIONS OF THE MINIMUM GRADE STANDARDS.

(A) The 2017 crop harvest timing is normal, and will be a week or so later than last year's "early" harvest. The quality appears to be good.

(B) During the 2016-17 crop year, incoming substandard and quality standards were maintained at the standard level. Substandard dockage has a maximum limit of 17% and B or Better maturity dockage allowance has a minimum limit of 35%.

(C) Although raisins produced from grapes grown outside of the State of California are not subject to volume regulations or grade and condition standards established under the marketing order, the surveillance and reporting provisions for any such raisins received by raisin handlers will continue for the 2017-2018 crop year. Arizona declared fruit must be validated as produced in Arizona or will be subjected to all requirements of California grown fruit.

(3) THE ESTIMATED TONNAGE OF STANDARD AND OFF-GRADE RAISINS WHICH WILL BE PRODUCED.

(A) The Committee met on October 12, 2017 to establish the estimated production for the 2017/18 crop year.

The 2017 crop will be smaller than the 2016 crop by approximately 20% due to reduced raisin acreage, smaller bunch count and damage from extreme heat.

The production of natural seedless for the 2017-2018 crop year is expected to be the lowest volume since the 1998-99 crop of 240,469 tons.

Varietal Type	Estimated Production
Natural Seedless +	230,000 +/- 15,000
Dipped Seedless	1,700
Golden Seedless	16,000
Zante Currant	2,000
Sultana	20
Muscat	0
Monukka	50
Other Seedless	7,600
Other Seedless Sulf.	600

+ Beginning with the 2003-04 Crop Year, the Natural Seedless varietal type was modified through informal rulemaking to include Oleate Seedless (68 FR 42943: July 21, 2003).

The 2017 August 1 grape estimate and the 2016 and 2015 final grape crops (in green tons) are as follows:

Varietal Type	***2017 est.***	Final 2016	Final 2015
Wine	4,000,000	3,900,000	3,705,000
Table	1,150,000	1,250,000	1,135,000
Raisin	1,450,000	1,750,000	2,007,000
Total	6,600,000	6,900,000	7,200,000

Source: USDA Crop Production, August 10, 2017

(B) Estimate of Tunnel Dehydrated Raisin Production.

Production of Golden Seedless raisins in the 2016-2017 crop year was 20,761 swb tons. The carry-over from that year was 6,224 tons. Dipped Seedless production in 2016-2017 was 2,347 tons with a carry-over of 1,290 tons. The Committee will determine a 2017-18 crop estimate for Golden Seedless and Dipped Seedless raisins. (See chart on page 2)

(C) Estimated Tonnage of Off Grade Raisins to be Produced.

Primarily, as a result of the September rains during harvest, there will be the need for off-grade reconditioning.

(4) THE ESTIMATED TRADE DEMAND FOR RAISINS IN FREE TONNAGE OUTLETS.

(A) The tonnage of raisins marketed in recent crop years in domestic and Canadian markets, including government purchases, on a packed tonnage basis is shown in the following table:

Domestic & Canadian Markets Packed Tons					
Varietal Type	2012-13	2013-14	2014-15	2015-16	***2016-17***
Natural Seedless	184,417	202,809	189,725	182,140	196,303
Dipped Seedless	2,847	3,056	1,547	4,084	1,617
Golden Seedless	12,486	11,928	13,263	13,364	13,748
Zante Currants	1,501	1,439	1,394	1,247	1,500
Sultanas	57	53	23	45	37
Muscats	0	0	0	0	0
Monukkas	71	94	54	43	107
Other Seedless	7,114	6,353	7,210	11,439	9,441
Other Seedless Sulf.	328	401	212	535	406
Total	208,821	226,133	213,428	212,897	223,159
Five-Yr. Average					216,888

(B) Free tonnage marketed in foreign markets during the past five years:

Export Markets Packed Tons					
Varietal Type	2012-13	2013-14	2014-15	2015-16	***2016-17***
Natural Seedless	108,816	142,757	111,407	98,523	108,503
Dipped Seedless	522	499	249	547	103
Golden Seedless	4,915	5,701	5,393	4,769	5,923
Zante Currants	1,231	1,434	1,053	1,215	999
Sultanas	0	0	0	0	0
Muscats	0	0	0	0	0
Monukkas	0	0	0	0	2
Other Seedless	1,409	2,050	1,206	1,020	1,947
Other Seedless Sulf.	62	61	86	52	65
Total	116,955	152,502	119,394	106,126	117,542
Five-Yr. Average					122,504

(5) AN ESTIMATED DESIRABLE CARRYOUT AT THE END OF THE CROP YEAR.

The Committee believes there is no longer a requirement for the Desirable Carryout.

(6) THE ESTIMATED MARKET REQUIREMENTS FOR RAISINS, CONSIDERING THE ESTIMATED WORLD RAISIN SUPPLY AND DEMAND SITUATION.

The export of California Natural Seedless raisins increased by 9,980 packed tons to 108,503 packed tons during 2016-2017 from 98,523 packed tons in 2015-16.

The following table shows the shipments of raisins on a packed weight basis for the 2016-2017 crop year.

Countries of Destination	Natural Seedless	Golden Seedless	Other
Australia	2,119	103	93
Belgium	603	0	0
China*	8,988	11	517
Denmark	1,772	0	1
Finland	1,153	0	0
France	82	0	0
Germany	12,105	60	0
Hong Kong	1,540	124	143
Indonesia	1,512	45	152
Israel	738	2,273	34
Japan	29,449	29	693
Malaysia	1,737	574	56
Mexico	2,407	198	67
Netherlands	2,685	45	0
New Zealand	1,174	43	43
Norway	2,641	0	0
Philippines	3,505	23	4
Singapore	1,338	198	7
Ireland	422	0	0
South Korea	4,081	8	10
Sweden	3,606	0	11
Taiwan	4,481	67	43
Thailand	3,976	99	49
United Kingdom	8,668	214	694
Russia	0	0	0
Latin America	4,221	263	148
All Other Markets	3,500	1,546	351
TOTAL	108,503	5,923	3,116

*Historically a large volume of China exports are transshipped directly to Japan.

The RAC will be hosting the International Conference of Dried Grape Producing Countries in Monterey, California and will return with up to date statistics.

(7) CURRENT PRICES BEING RECEIVED AND THE PROBABLE GENERAL LEVEL OF PRICES TO BE RECEIVED FOR RAISINS BY PRODUCERS AND HANDLERS.

(A) Negotiations between packers and the RBA are being held pursuant to the terms of their contract.

Probable Prices to be Received by Producers for the 2017-2018 Crop

Natural Seedless	$ .90	*Per Pound*
Dipped Seedless	$	*Per Ton*
Golden Seedless	$	*Per Ton*
Zante Currants	$	*Per Ton*
Sultanas	$	*Per Ton*
Muscats	$	*Per Ton*
Monukkas	$	*Per Ton*
Other Seedless	$	*Per Ton*
Other Seedless Sulf.	$	*Per Ton*

(B) Current Prices Being Quoted by Handlers as of September, FOB

Natural Seedless	$	*Per Ton*
Dipped Seedless	$	*Per Ton*
Golden Seedless	$	*Per Ton*
Zante Currants	$	*Per Ton*
Other Seedless	$	*Per Ton*

(8) THE TREND AND LEVEL OF CONSUMER INCOME.

Real economic growth continues but the financial background of monetary and economic policy remains unresolved. Credit clouds are developing but whether they will just blow over remains to be seen.

For the past three months, employment gains have averaged 180,000 while industrial production growth in the first half of 2017 was 2.5 percent. These provide positive signals for sunshine today. Our outlook is for GDP and real final sales growth in the second half of 2017 at 2.5 percent, with solid contributions from the consumer, business and government sectors.

As for inflation, we anticipate that the PCE deflator, the Fed's benchmark, will remain near 1.5 percent, comfortably below the FOMC's 2 percent target. However, labor costs, as measured by the ECI, will drift upward. Given the growth and inflation outlook, we expect the FOMC to announce the start of balance sheet reductions in September and raise the federal funds rate in December. A more cautious inflation outlook/FOMC policy will allow the trade weighted dollar to continue to decline as foreign central banks begin the process of pulling back on their accommodation. The Bank of Canada (BoC) has already raised its benchmark rate and the European Central Bank (ECB) is continuing to taper.

So where are the clouds? First, the FOMC's reduction in the balance sheet is taking place in the context of a higher funds rate path and increased Treasury deficit financing. Second, consumer/business credit quality and availability is falling

Source: Wells Fargo Monthly Outlook, US Overview;
August 9, 2017.

Historically, California raisins maintain good market demand regardless of economic conditions.

(9) ANY OTHER PERTINENT FACTORS BEARING ON THE MARKETING OF SUCH RAISINS INCLUDING THE ESTIMATED SUPPLY AND DEMAND FOR OTHER VARIETAL TYPES AND REGULATIONS APPLICABLE THERETO.

Industry shipments were up 9% for natural seedless overall; 10% in export and 8% domestic. After difficult negotiations, the Raisin Bargaining Association reached an agreement in February 2017 with all the raisin handlers at a grower field price of $1,100 per ton for the 2016 crop. This decrease in grower price influenced the volume of raisins shipped.

Last year had 17.2 inches of precipitation in the Fresno area, compared to an average of 11.5 inches. Above average rainfall this winter refilled surface water storage facilities to the point that raisin growers who normally receive surface irrigation water received a supply. Still, underground water supplies remained a significant source for agricultural irrigation. Urban and environmental demand for additional surface water continues to force growers to pump from the underground supply and drill new wells.

In California, 35 of California's 58 counties continued to be given a disaster designation for the 2017 crop year by the USDA due to the ongoing effects of the drought. The raisin producing counties of Fresno, Tulare, Madera, Kings and Kern were all included in these designations.

In September, there were rain storms that hit the raisin growing area of California. 80% of the crop was in varying stages of the harvest. To date it is too early to know the extent of damage.

General Information: Shrink

In the processing of raisins, a shrinkage occurs. Annually, the "shrinkage" varies due to growing conditions. Shrinkage is computed by determining the disappearance between the total available natural condition supply and the quantity reported as processed. This "Shrinkage" or loss is reflected as a conversion factor throughout this report to account for the difference between natural condition "sweatbox" and processed "packed" weights.

The table on this page shows the annual conversion factors used to convert packed tonnage figures to a sweatbox basis.

Conversion Factors are applied to reported packed weight to determine the sweatbox equivalent. Packed tons are divided by the conversion factor to obtain the equivalent sweatbox weight.

Conversion of sweatbox weight to a packed weight basis is accomplished by multiplying the sweatbox weight by the conversion factor.

	12-13	13-14	14-15	15-16	16-17
Natural Seedless	0.946	0.952	0.943	0.928	0.952
Dipped Seedless	0.891	0.688	0.763	0.945	0.853
Golden Seedless	0.912	0.918	0.873	0.917	0.932
Zante Currants	0.845	0.854	0.744	0.867	0.863
Sultanas	0.898	0.691	0.705	0.949	0.931
Muscats	0.021	1.000	1.000	1.000	1.000
Monukkas	0.660	0.806	0.641	1.286	0.819
Other Seedless	0.904	0.958	0.845	0.940	0.946
Other Seedless Sulf.	1.056	0.964	0.532	1.617	0.771

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Part IV – Members, Alternates and Staff

Part V – World Markets and Trade

Table 1

California Bearing Grape Acreage
By Varietal Type, Production and Yield Per Acre

	BEARING ACREAGE				Fresh Grape	Yield Per
Year	Total	Wine	Table	Raisins	Production (tons)	Acre (tons)
2008	786,000	482,000	83,000	221,000	6,532,000	8.31
2009	789,000	489,000	84,000	216,000	6,548,000	8.30
2010	789,000	489,000	84,000	209,076	6,544,000	8.29
2011	792,000	497,000	85,000	210,000	6,700,000	8.46
2012	796,000	506,000	85,000	205,000	6,488,000	8.15
2013	793,000	508,000	85,000	200,000	6,678,000	8.42
2014	820,000	525,000	95,000	200,000	7,717,000	9.41
2015	865,000	565,000	110,000	190,000	6,822,000	7.89
2016	856,000	560,000	112,000	184,000	6,847,000	8.00
2017	841,000	560,000	111,000	170,000	6,726,000	8.00
TEN YEAR AVERAGE						
	812,700	518,100	93,400	200,508	6,760,200	8.32

Source: Agricultural Statistics Board NASS, USDA - June 2017

The total production of grapes in California continues to be influenced more by the change in production per acre than by any change in bearing acreage. The ten year average grape production per acre was 5.2 tons - 1940-49; 6.2 tons - 1950-59; 7.1 tons - 1960-69; 7.0 tons - 1970-79; 7.92 tons - 1980-89 and 8.02 tons for the ten years 1990-99. The increased production per acre has been significant in the increase in total grape production. The 10 year average bearing acreage for 1940-49 was 501,785 acres, the 10 year average for 1980-89 was 643,329 acres and 673,270 acres for the ten years 1990-99.

Table 1A

California Non-Bearing Grape Acreage
By Varietal Type

NON-BEARING ACREAGE				
Year	Total	Wine	Table	Raisins
2007	59,000	43,000	10,000	6,000
2008	58,000	44,000	10,000	4,000
2009	54,000	42,000	9,000	3,000
2010	50,000	38,000	9,000	3,000
2011	52,000	37,000	11,000	4,000
2012	54,000	38,000	13,000	3,000
2013	58,000	45,000	10,000	3,000
2014	63,000	50,000	11,000	2,000
2015	62,000	48,000	12,000	2,000
2016	56,000	42,000	12,000	2,000
TEN YEAR AVERAGE				
	56,600	42,700	10,700	3,200

Source: CA Grape Acreage Report, April 2017

Table 2

California Total Annual Grape Production
By Varietal Type and Utilization
2012-2016
(Fresh Tons)

Varietal Type	2012-2013 Crop		2013-2014 Crop		2014-2015 Crop		2015-2016 Crop		*2016-2017 Crop*	
	Tons	*%*	*Tons*	*%*	*Tons*	*%*	*Tons*	*%*	*Tons*	*%*
Raisins										
Dried	1,508,000	77.10	1,831,000	81.41	1,544,000	87.58	1,858,000	92.58	1,390,000	90.49
Crushed	300,000	15.34	328,000	14.58	155,000	8.79	92,000	4.58	98,000	6.38
Canned	25,000	1.28	25,000	1.11	21,000	1.19	22,000	1.10	19,000	1.24
Fresh Sales	123,000	6.29	65,000	2.89	43,000	2.44	35,000	1.74	29,000	1.89
Total Production	1,956,000	29.27	2,249,000	28.93	1,763,000	25.95	2,007,000	29.35	1,536,000	22.99
Wine										
Crushed	3,700,000	98.93	4,245,000	100.00	3,893,000	100.00	3,705,000	100.00	4,031,000	100.00
Fresh Sales	40,000	1.07	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Production	3,740,000	55.96	4,245,000	54.61	3,893,000	57.29	3,705,000	54.19	4,031,000	60.33
Table										
Dried	56,000	5.67	53,000	4.14	68,000	5.83	61,000	5.37	54,000	4.66
Crushed	100,000	10.13	180,000	14.07	95,000	8.15	71,000	6.26	98,000	8.46
Fresh Sales	831,000	84.19	1,046,000	81.78	1,003,000	86.02	1,003,000	88.37	1,007,000	86.89
Total Production	987,000	14.77	1,279,000	16.45	1,166,000	17.16	1,135,000	16.60	1,159,000	17.35
Total Grape										
Dried	1,564,000	23.40	1,884,000	24.24	1,612,000	23.72	1,919,000	28.07	1,444,000	21.61
Crushed	4,100,000	61.35	4,753,000	61.15	4,116,000	60.57	3,858,000	56.43	4,183,000	62.60
Canned	25,000	0.37	25,000	0.32	21,000	0.31	22,000	0.32	19,000	0.28
Fresh Sales	994,000	14.87	1,111,000	14.29	1,046,000	15.39	1,038,000	15.18	1,036,000	15.50
Total Production	6,683,000	100.00	7,773,000	100.00	6,795,000	100.00	6,837,000	100.00	6,682,000	100.00

Percentages in Relation to Total Annual Production and Type of Production

Source: Agricultural Statistics Board NASS, USDA, Noncitrus Fruits and Nuts - June 2017. Percentages computed by the RAC.

Table 3

Raisin Deliveries By Varietal Types
2007-2016
(Sweatbox Tons)

Varietal Type	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	*2016-17*
Natural Seedless	329,288	364,268	298,532	354,878	346,132	311,090	364,794	303,890	336,697	281,496
Dipped Seedless	3,225	4,845	3,827	4,440	2,352	3,644	4,925	3,947	2,926	2,348
Golden Seedless	17,626	19,782	17,008	21,827	21,960	17,340	21,402	19,128	21,110	20,761
Zante Currants	3,347	2,912	2,708	3,468	3,167	2,976	2,885	3,084	3,091	2,569
Sultanas	93	67	63	66	76	68	58	59	33	27
Muscat	3	5	8	5	3	0	0	24	0	0
Monukka	280	287	155	140	130	111	85	73	70	73
Other Seedless	5,231	6,529	7,304	11,351	9,035	9,655	10,469	13,865	11,065	10,839
Other Seedless, Sulf.	687	521	413	808	471	381	530	424	457	885
TOTALS	359,780	399,217	330,018	396,983	383,326	345,265	405,148	344,494	375,449	318,998

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Table 3A

Top 20 Destinations for Crop Year 2016-2017
Natural Seedless
(Packed Tons)

YTD Rank	Destination	YTD Tonnage 8/01/16-7/31/17	Previous YTD tonnage 8/01/15-7/31/16
1	United States	185,634	173,714
2	Japan	29,449	27,249
3	Germany	12,105	7,892
4	Canada	10,669	8,426
5	China*	8,988	7,567
6	United Kingdom	8,668	8,945
7	Taiwan	4,481	3,971
8	South Korea	4,081	4,334
9	Thailand	3,976	2,969
10	Sweden	3,606	4,026
11	Philippines	3,505	3,127
12	Netherlands	2,685	2,073
13	Norway	2,641	2,393
14	Mexico	2,407	2,647
15	Australia	2,119	811
16	Denmark	1,772	1,863
17	Malaysia	1,737	2,090
18	Hong Kong	1,540	1,790
19	Indonesia	1,512	1,324
20	Singapore	1,338	1,399

*Historically a large volume of China exports are transshipped directly to Japan.

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Table 4

Free Tonnage Shipments By Country of Destination
Natural Seedless Raisins
August 1 - July 31
(Packed Tons)

Country of Destination	2015-2016	2016-2017	Percent Gain/Loss (2015-2016=100%)
European Countries			
Austria	**164**	**127**	**-22.56%**
Belgium	**546**	**603**	**105.26%**
Denmark	**1,863**	**1,772**	**-4.86%**
Ireland	**1,222**	**422**	**-65.46%**
Finland	**1,186**	**1,153**	**-2.79%**
France	**98**	**82**	**-16.33%**
Germany	**7,892**	**12,105**	**53.38%**
Israel	**689**	**738**	**7.07%**
Italy	**38**	**23**	**-38.63%**
Netherlands	**2,073**	**2,685**	**29.54%**
Norway	**2,393**	**2,641**	**10.36%**
Spain	**209**	**258**	**23.44%**
Sweden	**4,026**	**3,606**	**-10.44%**
Switzerland	**22**	**44**	**100.00%**
United Kingdom	**8,945**	**8,668**	**-3.09%**
Total European Countries	**31,366**	**34,927**	**11.35%**
Latin American Republics			
Brazil	**287**	**306**	**6.62%**
Colombia	**611**	**693**	**61.64%**
Costa Rica	**347**	**463**	**33.40%**
Dominican Republic	**1,071**	**1,194**	**11.40%**
Ecuador	**3**	**1**	**-66.67%**
Mexico	**2,647**	**2,407**	**-9.06%**
Panama	**463**	**567**	**22.51%**
Puerto Rico	**0**	**0**	**0.00%**
Venzuela	**0**	**0**	**0.00%**
Others	**910**	**997**	**9.58%**
Total Latin American Republics	**6,339**	**6,628**	**4.56%**
Other Countries			
Australia	**811**	**2,119**	**161.30%**
China	**7,567**	**8,988**	**18.77%**
Hong Kong	**1,790**	**1,540**	**-13.99%**
Iceland	**288**	**245**	**-14.94%**
Indonesia	**1,324**	**1,512**	**14.24%**
Japan	**27,249**	**29,449**	**8.07%**
South Korea	**4,334**	**4,081**	**-5.84%**
Malaysia	**2,090**	**1,737**	**-16.90%**
New Zealand	**1,270**	**1,174**	**-7.56%**
USSR - Russia	**0**	**0**	**0.00%**
Philippines	**3,127**	**3,505**	**12.08%**
Singapore	**1,399**	**1,338**	**-4.33%**
Taiwan	**3,971**	**4,481**	**12.84%**
Thailand	**2,969**	**3,976**	**33.91%**
Others	**2,629**	**2,803**	**6.63%**
Total Other Countries	**60,818**	**66,948**	**10.08%**
GRAND TOTAL	**98,523**	**108,503**	**10.13%**

Table 4 ZC

Free Tonnage Shipments By Country of Destination
Zante Currant Raisins
August 1 - July 31
(Packed Tons)

Country of Destination	2015-2016	*2016-2017*	Percent Gain/Loss (2015-2016=100%)
European Countries			
Austria	0	0	0.00%
Belgium	0	0	0.00%
Denmark	0	1	0.00%
Ireland	0	0	0.00%
Finland	0	0	0.00%
France	0	0	0.00%
Germany	0	0	0.00%
Israel	45	0	-100.00%
Italy	(3)	0	100.00%
Netherlands	0	0	0.00%
Norway	0	0	0.00%
Spain	0	0	0.00%
Sweden	7	11	57.14%
Switzerland	0	0	0.00%
United Kingdom	0	0	0.00%
Total European Countries	49	12	-75.52%
Latin American Republics			
Brazil	0	0	0.00%
Colombia	0	0	0.00%
Costa Rica	0	0	0.00%
Dominican Republic	0	0	0.00%
Ecuador	0	0	0.00%
Mexico	0	1	100.00%
Panama	0	0	0.00%
Puerto Rico	0	0	0.00%
Venzuela	0	0	0.00%
Others	0	0	0.00%
Total Latin American Republics	0	1	100.00%
Other Countries			
Australia	0	0	0.00%
China	314	471	50.00%
Hong Kong	0	20	100.00%
Iceland	0	0	0.00%
Indonesia	231	63	-73.00%
Japan	467	328	-29.89%
South Korea	28	10	-64.29%
Malaysia	36	19	-47.23%
New Zealand	5	10	100.00%
USSR - Russia	0	4	100.00%
Philippines	4	7	75.00%
Singapore	42	31	-26.20%
Taiwan	28	0	-100.00%
Thailand	0	0	0.00%
Others	11	23	109.09%
Total Other Countries	1,166	986	-15.50%
GRAND TOTAL	1,215	999	-17.79%

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Table 4A

Free Tonnage Export Shipments

(Excluding Canada)

Natural Seedless Raisins

2012 - 2016

(Packed Tons)

	2012-2013	2013-2014	2014-2015	2015-2016	*2016-2017*
August	11,805	9,980	11,560	8,212	10,167
September	11,309	10,547	10,480	8,749	8,980
October	9,939	12,084	10,314	9,302	7,695
November	7,569	10,462	7,051	6,807	8,345
December	7,773	12,396	9,935	8,521	9,259
January	8,803	12,088	5,712	7,012	8,445
February	8,714	12,174	8,542	7,530	8,968
March	9,217	13,113	11,883	7,233	10,506
April	8,737	13,119	10,625	8,525	9,048
May	8,566	13,051	8,174	8,725	9,667
June	7,421	12,426	7,840	9,585	9,008
July	8,963	11,317	9,291	8,322	8,415
TOTAL YEAR	108,816	142,757	111,407	98,523	108,503

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Table 4B

Free Tonnage Export Shipments
(Excluding Canada)
Zante Currant Raisins
2012 - 2016
(Packed Tons)

	2012-2013	2013-2014	2014-2015	2015-2016	*2016-2017*
August	125	106	207	128	115
September	84	125	52	151	76
October	61	128	155	66	68
November	100	124	72	65	15
December	54	68	45	86	144
January	46	119	69	67	90
February	142	150	47	101	28
March	172	71	132	81	62
April	148	184	62	100	122
May	146	67	91	130	93
June	51	179	76	123	95
July	102	113	45	117	91
TOTAL YEAR	1,231	1,434	1,053	1,215	999

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Table 5

Free Tonnage Shipments To Domestic And Canadian Markets
(Including Government)
Natural Seedless Raisins
2012 - 2016
(Packed Tons)

	2012-2013		2013-2014		2014-2015		2015-2016		2016-2017	
	Tons	*%*	*Tons*	*%*	*Tons*	*%*	*Tons*	*%*	*Tons*	*%*
August										
Packed	5,656	34	4,900	31	4,779	26	4,269	30	4,950	33
Bulk	11,017	66	10,656	69	13,588	74	9,775	70	9,995	67
TOTAL	**16,673**	100	**15,556**	100	**18,367**	100	**14,044**	100	**14,945**	100
September										
Packed	5,234	36	5,204	35	5,489	32	5,651	36	5,524	34
Bulk	9,358	64	9,791	65	11,494	68	10,029	64	10,489	66
TOTAL	**14,592**	100	**14,995**	100	**16,983**	100	**15,680**	100	**16,013**	100
October										
Packed	6,624	37	6,871	38	7,364	39	6,313	36	6,555	39
Bulk	11,368	63	11,232	62	11,357	61	11,228	64	10,325	61
TOTAL	**17,992**	100	**18,103**	100	**18,721**	100	**17,541**	100	**16,880**	100
November										
Packed	6,450	41	6,469	39	5,333	39	5,177	30	4,817	30
Bulk	9,405	59	10,171	61	8,470	61	11,958	70	11,163	70
TOTAL	**15,855**	100	**16,640**	100	**13,803**	100	**17,135**	100	**15,980**	100
December										
Packed	5,485	41	5,353	36	5,305	34	5,763	34	4,373	28
Bulk	7,980	59	9,488	64	10,140	66	11,131	66	11,108	72
TOTAL	**13,465**	100	**14,841**	100	**15,445**	100	**16,894**	100	**15,481**	100
January										
Packed	5,443	35	5,126	31	4,781	33	4,853	29	4,611	27
Bulk	9,991	65	11,316	69	9,685	67	11,967	71	12,572	73
TOTAL	**15,434**	100	**16,442**	100	**14,466**	100	**16,820**	100	**17,183**	100
February										
Packed	4,712	33	5,290	35	5,053	35	4,797	30	4,259	26
Bulk	9,637	67	9,814	65	9,522	65	11,304	70	11,982	74
TOTAL	**14,349**	100	**15,104**	100	**14,575**	100	**16,101**	100	**16,241**	100
March										
Packed	5,575	36	5,747	34	6,317	36	5,120	33	5,003	29
Bulk	9,995	64	11,031	66	11,287	64	10,337	67	12,112	71
TOTAL	**15,570**	100	**16,778**	100	**17,604**	100	**15,457**	100	**17,115**	100
April										
Packed	4,846	30	5,367	28	4,990	31	3,902	29	4,304	28
Bulk	11,472	70	13,585	72	11,309	69	9,361	71	11,299	72
TOTAL	**16,318**	100	**18,952**	100	**16,299**	100	**13,263**	100	**15,603**	100
May										
Packed	4,819	30	4,580	24	4,277	29	3,970	29	4,047	24
Bulk	11,189	70	14,863	76	10,349	71	9,521	71	13,011	76
TOTAL	**16,008**	100	**19,443**	100	**14,626**	100	**13,491**	100	**17,058**	100
June										
Packed	4,574	38	4,579	27	3,874	27	3,744	29	4,011	23
Bulk	7,344	62	12,374	73	10,620	73	9,325	71	13,705	77
TOTAL	**11,918**	100	**16,953**	100	**14,494**	100	**13,069**	100	**17,716**	100
July										
Packed	4,880	30	4,862	26	4,071	28	4,050	32	3,694	23
Bulk	11,363	70	14,140	74	10,271	72	8,595	68	12,394	77
TOTAL	**16,243**	100	**19,002**	100	**14,342**	100	**12,645**	100	**16,088**	100
TOTAL YEAR										
Packed	64,298	35	64,348	32	61,633	32	57,609	32	56,148	29
Bulk	120,119	65	138,461	68	128,092	68	124,531	68	140,155	71
TOTAL	**184,417**	100	**202,809**	100	**189,725**	100	**182,140**	100	**196,303**	100

Table 6

Free Tonnage Shipments To All Market Outlets
2009 - 2016
(Sweatbox Tons)

Variety	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	*2016-17*
Natural Seedless								
Domestic & Canada	194,879	191,211	196,682	194,950	213,084	201,238	196,238	206,288
Export Free	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021
Total	**354,242**	**328,193**	**324,490**	**309,981**	**363,073**	**319,405**	**302,387**	**320,309**
Dipped Seedless								
Domestic & Canada	4,389	5,397	1,876	3,195	4,441	2,027	4,322	1,895
Export Free	23	34	184	585	724	326	579	122
Total	**4,412**	**5,431**	**2,060**	**3,780**	**5,165**	**2,353**	**4,901**	**2,017**
Golden Seedless								
Domestic & Canada	12,632	14,066	13,419	13,697	12,988	15,194	14,569	14,750
Export Free	5,245	6,521	5,828	5,392	6,208	6,178	5,198	6,355
Total	**17,877**	**20,587**	**19,247**	**19,089**	**19,196**	**21,372**	**19,767**	**21,105**
Zante Currants								
Domestic & Canada	1,583	1,307	1,448	1,777	1,684	1,873	1,437	1,738
Export Free	895	1,205	1,089	1,458	1,680	1,415	1,401	1,157
Total	**2,478**	**2,512**	**2,537**	**3,235**	**3,364**	**3,288**	**2,838**	**2,895**
Sultanas								
Domestic & Canada	83	57	60	64	76	32	48	40
Total	**83**	**57**	**60**	**64**	**76**	**32**	**48**	**40**
Muscats								
Domestic & Canada	0	2	0	23	0	0	0	0
Export Free	0	0	0	0	0	0	0	0
Total	**0**	**2**	**0**	**23**	**0**	**0**	**0**	**0**
Monukka Type								
Domestic & Canada	153	109	126	108	117	84	34	131
Export Free	0	0	0	0	0	0	0	3
Total	**153**	**109**	**126**	**108**	**117**	**84**	**34**	**134**
Other Seedless								
Domestic & Canada	6,716	9,374	6,283	7,873	6,634	8,533	12,171	9,980
Export Free	1,367	1,482	2,659	1,559	2,140	1,427	1,086	2,058
Total	**8,083**	**10,856**	**8,942**	**9,432**	**8,774**	**9,960**	**13,257**	**12,038**
Other Seedless Sulfured								
Domestic & Canada	462	456	430	311	416	399	331	526
Export Free	23	166	100	59	64	161	32	85
Total	**485**	**622**	**530**	**370**	**479**	**560**	**363**	**611**
TOTAL ALL VARIETIES	**387,813**	**368,369**	**357,992**	**346,082**	**400,244**	**357,054**	**343,595**	**359,149**

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Table 6A

Free Tonnage Shipments To All Market Outlets
2009 - 2016
(Packed Tons)

Variety	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	*2016-17*
Natural Seedless								
Domestic & Canada	186,176	180,344	183,703	184,417	202,809	189,725	182,140	196,303
Export Free	152,246	129,198	119,373	108,816	142,757	111,407	98,523	108,503
Total	**338,422**	**309,542**	**303,076**	**293,233**	**345,566**	**301,132**	**280,663**	**304,806**
Dipped Seedless								
Domestic & Canada	3,629	4,803	1,618	2,847	3,056	1,547	4,084	1,617
Export Free	19	30	158	522	499	249	547	103
Total	**3,648**	**4,833**	**1,776**	**3,369**	**3,555**	**1,796**	**4,631**	**1,720**
Golden Seedless								
Domestic & Canada	11,699	12,614	11,986	12,486	11,928	13,263	13,364	13,748
Export Free	4,858	5,848	5,206	4,915	5,701	5,393	4,769	5,923
Total	**16,557**	**18,462**	**17,192**	**17,401**	**17,629**	**18,656**	**18,133**	**19,671**
Zante Currants								
Domestic & Canada	1,382	1,090	1,205	1,501	1,439	1,394	1,247	1,500
Export Free	781	1,003	905	1,231	1,434	1,053	1,215	999
Total	**2,163**	**2,093**	**2,110**	**2,732**	**2,873**	**2,447**	**2,462**	**2,499**
Sultanas								
Domestic & Canada	52	37	58	57	53	23	45	37
Total	**52**	**37**	**58**	**57**	**53**	**23**	**45**	**37**
Muscats								
Domestic & Canada	0	2	0	0	0	0	0	0
Export Free	0	0	0	0	0	0	0	0
Total	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0**
Monukka Type								
Domestic & Canada	126	101	142	71	94	54	43	107
Export Free	0	0	0	0	0	0	0	2
Total	**126**	**101**	**142**	**71**	**94**	**54**	**43**	**109**
Other Seedless								
Domestic & Canada	5,386	7,237	5,750	7,114	6,353	7,210	11,439	9,441
Export Free	1,096	1,144	2,434	1,409	2,050	1,206	1,020	1,947
Total	**6,482**	**8,381**	**8,184**	**8,523**	**8,403**	**8,416**	**12,459**	**11,388**
Other Seedless Sulfured								
Domestic & Canada	422	396	450	328	401	212	535	406
Export Free	21	144	105	62	61	86	52	65
Total	**443**	**540**	**555**	**390**	**462**	**298**	**587**	**471**
TOTAL ALL VARIETIES	**367,893**	**343,991**	**333,093**	**325,776**	**378,635**	**332,822**	**319,023**	**340,701**

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Table 7

Free Tonnage Shipments To Domestic And Canadian Markets
(Including Government)
Natural Seedless Raisins
2001 - 2016
(Packed Tons)

Crop Year	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Total
2001-02	17,192	13,049	18,783	15,541	11,745	15,457	12,655	13,878	14,187	13,815	12,253	16,065	174,620
2002-03	16,163	16,661	17,326	15,181	13,496	14,971	12,147	15,556	14,059	13,661	12,835	14,998	177,054
2003-04	13,761	17,209	18,345	14,976	14,326	14,663	14,965	16,557	14,086	12,819	13,742	14,636	180,085
*2004-05	17,930	17,431	17,644	16,638	16,166	15,088	14,385	17,298	17,717	14,014	15,525	13,844	193,680
2005-06	18,773	17,176	17,600	17,322	14,255	14,502	14,440	17,066	14,914	13,331	16,065	10,914	186,358
2006-07	16,991	16,214	18,942	16,066	13,685	15,136	14,589	16,853	15,759	16,448	12,451	15,810	188,944
2007-08	17,805	14,936	18,918	16,826	13,117	17,155	16,624	16,097	15,936	15,166	13,940	17,089	193,609
2008-09	15,753	15,731	18,649	15,869	15,039	16,044	14,387	16,871	15,912	15,395	16,845	15,436	191,929
2009-10	14,438	17,414	16,949	17,813	14,990	14,588	13,839	17,279	16,097	13,870	14,772	14,127	186,176
*2010-11	15,282	17,097	17,205	16,052	16,224	15,231	13,951	16,966	14,106	13,036	13,157	12,037	180,344
*2011-12	16,696	16,486	16,841	16,772	14,626	14,467	15,309	16,564	14,729	14,261	12,900	14,052	183,703
*2012-13	16,673	14,592	17,992	15,855	13,465	15,434	14,349	15,570	16,318	16,008	11,918	16,243	184,417
*2013-14	15,556	14,995	18,103	16,640	14,841	16,442	15,104	16,778	18,952	19,443	16,953	19,002	202,809
*2014-15	18,367	16,983	18,721	13,803	15,445	14,466	14,575	17,604	16,299	14,626	14,494	14,342	189,725
*2015-16	14,044	15,680	17,541	17,135	16,894	16,820	16,101	15,457	13,263	13,491	13,069	12,645	182,140
2016-17	14,945	16,013	16,880	15,980	15,481	17,183	16,241	17,115	15,603	17,058	17,716	16,088	196,303
TEN YEAR AVERAGE	15,956	15,993	17,780	16,275	15,012	15,783	15,048	16,630	15,722	15,235	14,576	15,106	189,116

* No Pool Established

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Table 8

Free Tonnage Made Available For Disposition In Commercial Trade Channels
Natural Seedless Raisins
2007 - 2016
(Sweatbox Tons)

	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	*2016-17*
Natural Seedless Total Deliveries	329,288	364,268	298,532	354,878	346,132	311,090	364,794	303,890	336,697	281,496
Free Tonnage Purchasec	279,895	316,913	253,752	354,878	346,132	311,090	364,794	303,890	336,697	281,496
Reserve Tonnage Purchased (a	69,604	35,844	56,798	64	0	0	0	0	0	0
Total Tonnage Purchasec	349,499	352,757	310,550	354,942	346,132	311,090	364,794	303,890	336,697	281,496
Packers' August 1 Carryin (b)	105,430	106,249	126,824	83,143	110,206	132,061	132,407	138,215	122,954	158,287
Total Disposable Tonnage	454,929	459,006	437,374	438,085	456,338	443,151	497,201	442,105	459,651	439,783
Commercial Shipments	349,598	332,362	354,242	328,193	324,490	309,981	363,073	319,405	302,387	320,309
July 31 Carryout (calculated)	105,331	126,645	83,132	109,892	131,848	133,170	134,128	122,700	157,264	119,474

(a) Export and 10+10
(b) Packers' Carryin Inventory Report

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Table 9

SUPPLY AND DISPOSITION
NATURAL SEEDLESS RAISINS
2007-2016
(Sweatbox Tons)

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	*2016-2017*
Total Disposable Free Tonnage	454,929	459,006	437,374	438,085	456,338	443,151	497,201	442,105	459,651	439,783
Disposition										
Domestic & Canada	201,355	200,775	194,879	191,211	196,682	194,950	213,084	201,238	196,238	206,288
Export Free	148,243	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021
Total Disposition	349,598	332,362	354,242	328,193	324,490	309,981	363,073	319,405	302,387	320,309
Carryout (Calculated)	105,331	126,644	83,132	109,892	131,848	133,170	134,128	122,700	157,264	119,474
Reserve Tonnage										
Total Available Supply	70,257	48,002	56,934	71	2	0	0	0	0	0
Released for Export*	0	25,438	11,604	0	0	0	0	0	0	0
Other Disposition	70,257	22,564	45,330	71	2	0	0	0	0	0
Exports										
Free Tonnage	148,243	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021
Reserve Shipments	0	0	0	0	0	0	0	0	0	0
Total Exports	148,243	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021

* Raisin-Back

Table 10

Supply And Disposition Of Reserve Pool Tonnage
Natural Seedless Raisins
2009-2016
(Sweatbox Tons)

	2009-2010 Crop Year	2010-2011 Crop Year	2011-2012 Crop Year	*2012-2013 Crop Year*	*2013-2014 Crop Year*	*2014-2015 Crop Year*	*2015-2016 Crop Year*	*2016-2017 Crop Year*
SUPPLY								
Reserve Tonnage	44,780	0	0	0	0	0	0	0
Carry In From Previous Year	12,154	71	2	0	0	0	0	0
Total Reserve Supply	56,934	71	2	0	0	0	0	0
DISPOSITION								
10 & 10**	45,194	64	0	0	0	0	0	0
Export*	11,604	0	0	0	0	0	0	0
Raisin Diversion Program	0	0	0	0	0	0	0	0
Government	0	0	0	0	0	0	0	0
Non-Normal Outlets	0	0	0	0	0	0	0	0
Distillation	0	0	0	0	0	0	0	0
Donations	15	3	2	0	0	0	0	0
Miscellaneous	50	2	0	0	0	0	0	0
Carry Out To Subsequent Year	71	2	0	0	0	0	0	0
Total Disposition	56,934	71	2	0	0	0	0	0

** Includes all Reserve for Free Usage Sales

* Raisin-Back

Table 11

Reserve Pool Percentages
Natural Seedless Raisins
2002-2016

Crop Year	Preliminary Percentages Free	Preliminary Percentages Reserve	Secretary Established Free	Secretary Established Reserve	Date Established	Basis for Pool Payments Free	Basis for Pool Payments Reserve
2002-03	41	59	53	47	04/03/03	53	47
2003-04	65	35	70	30	08/10/04	70	30
2004-05	100	0	100	0	10/05/04	100	0
2005-06	74	26	82.5	17.5	05/23/06	82.5	17.5
2006-07	89.75	10.25	90	10	04/10/07	90	10
2007-08	84.75	15.25	85	15	02/20/08	85	15
2008-09	86.75	13.25	87	13	03/10/09	87	13
2009-10	84.75	15.25	85	15	06/25/10	85	15
2010-11	100	0	100	0	10/05/10	100	0
2011-12	100	0	100	0	08/15/12	100	0
2012-13	100	0	100	0	08/15/13	100	0
2013-14	100	0	100	0	08/14/14	100	0
2014-15	100	0	100	0	08/20/15	100	0
2015-16	100	0	100	0	08/16/16	100	0
2016-17	100	0	100	0	08/17/17	100	0

RAC - August 2017

Table 12

Comparison Of Packer Acquisitions By Week
Natural Seedless Raisins
2012-2016
(Sweatbox Tons)

Week of Delivery	2012-2013	2013-2014	2014-2015	2015-2016	*2016-2017*
1	64	8	1,423	1,306	4
2	130	29	0	650	504
3	1,181	50	562	0	0
4	1,000	11	730	107	23
Comparative 4 Week Total	2,375	98	2,715	2,063	531
5	119	420	438	674	120
6	1,510	3,986	3,625	3,168	917
7	2,826	8,785	10,997	5,680	2,580
8	10,782	16,960	15,321	9,446	7,998
9	18,663	20,481	20,005	12,012	14,228
Comparative 5 Week Total	33,900	50,632	50,386	30,980	25,843
10	26,281	21,172	20,469	14,251	16,352
11	34,830	26,995	26,703	16,735	21,722
12	31,458	27,254	22,334	17,538	23,582
13	28,078	22,268	17,301	19,084	21,028
Comparative 4 Week Total	120,647	97,689	86,807	67,608	82,684
14	24,869	23,259	17,464	11,388	15,424
15	15,751	15,568	31,879	19,389	13,173
16	10,453	15,611	10,670	17,266	17,988
17	4,163	36,395	17,157	5,250	3,163
Comparative 4 Week Total	55,236	90,833	77,170	53,293	49,748
18	17,688	17,898	4,238	14,692	8,244
19	7,932	7,788	10,207	8,922	5,525
20	5,428	6,693	9,115	11,579	6,323
21	10,622	2,146	1,850	2,910	2,763
22	1,093	2,132	1,850	3,728	970
Comparative 5 Week Total	42,763	36,657	27,260	41,831	23,825
23	2,865	4,690	4,888	15,773	948
24	3,449	21,407	2,796	6,823	15,362
25	9,370	3,273	3,532	6,956	2,564
26	3,679	2,993	1,537	9,806	2,975
Comparative 4 Week Total	19,363	32,363	12,753	39,358	21,849
27	5,035	3,615	10,417	4,385	9,805
28	2,424	5,203	1,706	5,196	17,941
29	1,447	2,176	2,056	8,107	2,671
30	1,489	2,957	2,642	2,870	4,711
Comparative 4 Week Total	10,395	13,951	16,821	20,558	35,128

Table 12 (cont.)

Comparison Of Packer Acquisitions By Week
Natural Seedless Raisins
2012-2016
(Sweatbox Tons)

Week of Delivery	2012-2013	2013-2014	2014-2015	2015-2016	*2016-2017*
31	1,520	3,739	1,459	10,078	2,820
32	1,718	3,453	7,546	4,260	3,160
33	1,469	3,963	655	2,992	1,510
34	1,960	2,342	1,587	4,416	6,113
Comparative 4 Week Total	6,667	13,497	11,247	21,746	13,603
35	1,366	7,809	788	2,685	840
36	519	705	427	18,834	588
37	760	1,453	2,990	(8,020)	370
38	629	2,438	2,961	16,216	516
39	884	1,043	2,344	2,495	1,298
Comparative 5 Week Total	4,158	13,448	9,510	32,210	3,612
40	1,162	1,889	1,428	4,152	153
41	835	1,488	1,922	2,244	217
42	1,509	1,452	1,887	792	1,009
43	1,397	1,841	(1,971)	5,664	2,362
Comparative 4 Week Total	4,903	6,670	3,266	12,852	3,741
44	1,241	1,666	109	1,611	9,982
45	1,044	1,168	988	2,174	716
46	740	1,395	1,320	6,159	2,112
47	186	1,248	1,287	1,307	1,647
Comparative 4 Week Total	3,211	5,477	3,704	11,251	14,457
48	22	538	44	723	1,282
49	19	744	699	672	1,259
50	567	777	1,160	83	395
51	682	218	53	6	(6)
52	6,182	1,202	295	1,463	3,545
Comparative 5 Week Total	7,472	3,479	2,251	2,947	6,475
YEARLY TOTAL	311,090	364,794	303,890	336,697	281,496

RAC - September 2017

Table 13

Free Tonnage Supply And Demand Situation
Natural Seedless Raisins
2002-2016
(Sweatbox Tons)

	SUPPLY							SHIPMENTS					
Crop Year	Acquired	Percent Free	Free Tonnage		Carryin	Purchased From Reserve	Total Free Supply	Canada and Domestic		Export (Free)	Total Disposition	Computed Carryout
2002-03	388,010	53.0	205,668	**	132,135	76,146	413,949	189,160		108,480	297,640	116,309
2003-04	296,864	70.0	207,818	**	129,345	61,186	398,349	191,376		112,860	304,236	94,113
2004-05	265,262	100.0	265,262		95,003	72,789	433,054	205,002		112,996	317,998	115,056
2005-06	319,126	82.5	263,287	**	114,792	31,975	410,054	195,822		102,632	298,454	111,600
2006-07	282,999	90.0	254,703	**	111,444	52,689	418,836	203,889	***	109,727	313,616	105,220
2007-08	329,288	85.0	279,895		105,430	69,604	454,929	201,355	***	148,243	349,598	105,331
2008-09	364,268	87.0	316,913		106,249	35,844	459,006	200,775	***	131,587	332,362	126,644
2009-10	298,532	85.0	253,752		126,824	56,798	437,374	194,879	***	159,363	354,242	83,132
2010-11	354,878	100.0	354,878		83,143	64	438,085	191,211	***	136,982	328,193	109,892
2011-12	346,132	100.0	346,132		110,206	0	456,338	196,682	***	127,808	324,490	131,848
2012-13	311,090	100.0	311,090		132,061	0	443,151	194,950	***	115,031	309,981	133,170
2013-14	364,794	100.0	364,794		132,407	0	497,201	213,084	***	149,989	363,073	134,128
2014-15	303,890	100.0	303,890		138,215	0	442,105	201,238	***	118,167	319,405	122,700
2015-16	336,697	100.0	336,697		122,954	0	459,651	196,238	***	106,149	302,387	157,264
2016-17	281,496	100.0	281,496		158,287	0	439,783	206,288	***	114,021	320,309	119,474
TEN YEAR AVERAGE												
	329,106	96 *	314,954		121,577	16,231	452,762	199,670		130,734	330,404	122,358

* Percentage is a weighted average
** Adjusted for exempt tonnage
***Includes Government Free

RAC - September 2017

Table 14

Calculated Free Tonnage Disappearance
Natural Seedless Raisins
2007-2016
(Sweatbox Tons)

Crop Year	Reported Beginning Physical Inventory	Free Tonnage	Reported Ending Physical Inventory	Free Tonnage Disappearance	Handler Reported Shipments (Packed Tons)	Calculated Shrink (a)
2007-08	105,430	349,499	106,249	348,680	336,150	3.59%
2008-09	106,249	352,757	126,824	332,182	317,718	4.35%
2009-10	126,824	310,550	83,143	354,232	338,422	4.46%
2010-11	83,143	354,942	110,206	327,878	309,542	5.59%
2011-12	110,206	346,132	132,061	324,277	303,076	6.54%
2012-13	132,061	311,090	132,407	310,744	293,233	5.64%
2013-14	132,407	364,794	138,215	358,986	345,566	3.74%
2014-15	138,215	303,890	122,954	319,151	301,132	5.65%
2015-16	122,954	336,697	158,287	301,364	280,663	6.87%
2016-17	158,287	281,496	121,135	318,648	304,806	4.34%

(a) The calculated shrinkage was determined by dividing Handler Reported Shipments by Free Tonnage Disappearance and deducting the result from 100%.

RAC - September 2017

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United States Department of Agriculture

Foreign Agricultural Service

September 2017

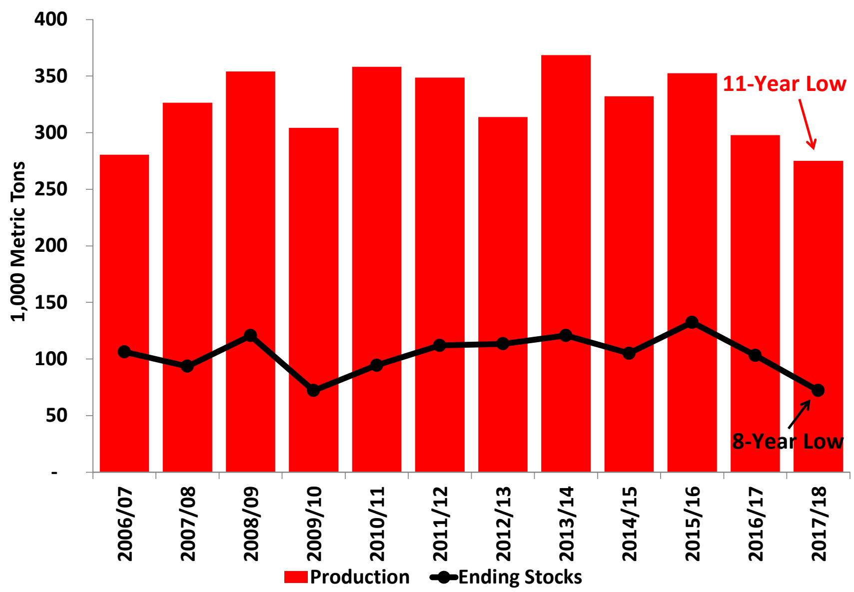
Raisins: World Markets and Trade

Global Raisin Production to Slip

Global raisin production for 2017/18 is forecast to ease 2 percent to 1.2 million metric tons (tons) as modest gains in China are more than offset by lower output in Turkey, United States and Iran. As a result of reduced available supplies, total ending stocks are expected to plunge 22 percent to 84,000 tons, an 8-year low. Global exports are forecast unchanged at 779,000 tons, as lower shipments from Turkey and the United States are offset by Argentina, Iran and Afghanistan.

U.S. production is forecast down 23,000 tons to an 11-year low of 275,000 tons. Although the California Raisin Grape Objective Measurement Report was not carried out again this year, the National Agricultural Statistics Service surveyed the industry and published the forecast for California's raisin-type grape production in the August 2017 Crop Production Report. Exports are forecast to fall 7,000 tons to 120,000 on lower shipments to the European Union, and to a lesser extent, China. Ending stocks are expected to plummet 31,000 tons to an 8-year low of 72,000 tons.

U.S. Production and Stocks Forecast Lowest in Years



China's production is forecast up 5,000 tons to 190,000 on favorable growing conditions in the major growing region of Turpan. In addition, drier weather during fruit development lowered pest and disease occurrence and improved grape quality. Exports are forecast to rebound to 25,000 tons on modest gains to the European Union and Japan.

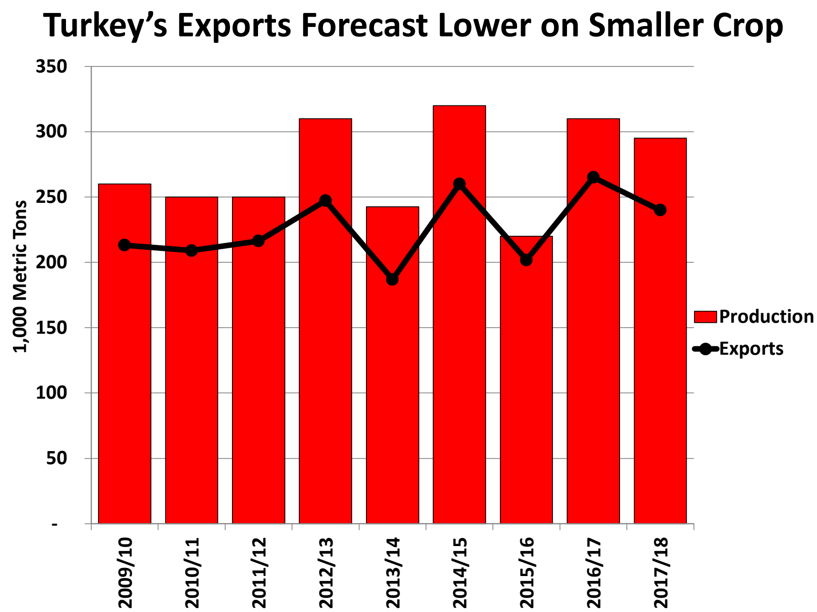
Located in Xinjiang, Turpan is China's largest raisin producing region, producing more than 80 percent. Although there are more than a dozen varieties, Thompson Seedless accounts for a vast majority of the region's grape area, largely because it can serve both the fresh consumption and raisin-producing markets. Raisins have historically been processed and sold from more than 100 small facilities, most of which use outdated technology and equipment. However, in June 2017, a modern raisin sorting, grading, and storage facility was built in Turpan with an annual capacity of up to 100,000 tons.

Green raisins account for approximately 60 percent of total production and are mostly consumed as snack foods, while dark raisins account for the remainder and are used by the domestic food processing industry. Green raisins are mainly produced by individual farmers using special drying houses, while most dark raisins are produced in factories with sun-drying yards.

To receive the circular via email, register at: https://public.govdelivery.com/accounts/USDAFAS/subscriber/new

Approved by the World Agricultural Outlook Board/USDA

Turkey's production is forecast to drop slightly to 295,000 tons due to sporadic frost and hail damage during the spring in some growing regions in Manisa and Izmir. With lower available supplies, exports are expected down 25,000 tons to 240,000 on slower shipments to the European Union, its primary market.



Although there are over 1,200 grape varieties grown throughout Turkey, Sultana seedless grapes account for approximately 40 percent by volume and are grown in the Aegean region. The Sultana Raisins Association has over 15,000 members and is the basis of TARIS Raisins Agricultural Sales Cooperatives Union. TARIS announces a procurement price for raisins every year, which also serves as a support price. While TARIS is required to buy raisins from its members, members are allowed to sell to other buyers. In general, TARIS purchases around 20 percent of total production and is the largest Sultana exporter.

Chile's production and exports are forecast nearly unchanged. Most raisins are produced from discarded table grapes unsuitable for fresh consumption. Nearly all production is exported; key markets include Europe, the United States, and Mexico.

South Africa's production and exports are forecast unchanged at 55,000 and 47,000 tons, respectively, on expectations of normal growing conditions. Approximately 90 percent of output is concentrated in the Orange River basin in northern Cape Province due to its ideal climate for drying grapes and availability of irrigated water. The remaining 10 percent is in the Namaqualand region. Grapes for raisins are harvested later than table grapes, usually from January to March, in order to maximize sugar content. The Thompson Seedless variety accounts for over half of output, followed by Sultana and Golden raisins. There are seven major raisin processors in South Africa. Sun drying is the most common processing method for Thompson Seedless, because it is quick and inexpensive, whereas Golden raisins are usually treated with sulfur dioxide and dried in a ventilated facility.

The confectionary and baking industry is the largest consumer of raisins in South Africa for products such as biscuits, cakes, and buns that are consumed during festive times such as Christmas, Easter, and Ramadan. Sultana raisins are ideal for baking while Golden raisins are popular in salads and several traditional dishes. Raisins are also consumed as snacks, and the industry is hopeful that demand for raisins as a snack will continue to improve as consumers' preferences move towards healthier and natural choices. However, current domestic consumption is largely influenced by available prices, competition from fresh table grapes, exports, and consumer income growth.

Argentina's production is forecast to rebound 9,000 tons from last year's frost damage to 40,000 on expectations of normal weather. Nearly all raisins are produced in the Province of San Juan, located alongside the Andes Mountains. Since this region averages only 8 inches of rain annually, plantations are irrigated from snowmelt from the Andes. Although land is available for expansion, area planted is expected to remain unchanged at 6,600 hectares due to the combination of high input costs and low prices. Exports are forecast up 7,000 tons to 35,000 on higher shipments to the European Union.

Revised 2016/17

World **production** is revised down from the September 2016 estimate by 7,000 tons to 1.2 million.

- United States is lowered 17,000 tons to 298,000.
- Iran is increased 20,000 tons to 170,000.
- Afghanistan is down 9,000 tons to 26,000.

World **exports** are revised up 30,000 tons to 779,000.

- Turkey is boosted 45,000 tons to 265,000.
- Iran is raised 14,000 tons to 134,000.

World **imports** are revised slightly higher 5,000 tons to 738,000.

- Kazakhstan is raised 10,000 tons to 55,000.
- Mexico is lowered 6,000 tons to 11,000.

World **ending stocks** are revised down 42,000 tons to 108,000.

- Turkey is down 36,000 tons to 3,000.

For additional information, please contact Tony Halstead at 202-720-4620,
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To download additional data tables, go to Production, Supply and Distribution Database (PSD Online): (http://apps.fas.usda.gov/psdonline/psdHome.aspx), scroll down to Reports, and Click the plus sign [+] next to Fruits and Vegetables

FAS Reports and Databases:

Current *World Market and Trade* Reports:
http://apps.fas.usda.gov/psdonline/psdDataPublications.aspx

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http://usda.mannlib.cornell.edu/MannUsda/viewTaxonomy.do?taxonomyID=7

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Global Agricultural Information Network (Agricultural Attaché Reports):
http://gain.fas.usda.gov/Pages/Default.aspx

Global Agricultural Trade System (U.S. Exports and Imports):
http://apps.fas.usda.gov/gats/default.aspx

Raisin Production, Supply and Distribution for Select Countries

Metric Tons (Dry Weight Basis)

	2012/13	2013/14	2014/15	2015/16	2016/17	Sep 2017/18
Production						
Turkey	310,000	242,635	320,000	220,000	310,000	295,000
United States	313,795	368,408	332,211	352,441	297,738	275,000
China	150,000	165,000	180,000	190,000	185,000	190,000
Iran	180,000	160,000	130,000	139,000	170,000	160,000
Uzbekistan	22,000	18,000	51,700	69,500	73,000	75,000
Chile	68,500	69,200	65,000	57,000	59,000	60,000
South Africa	46,000	46,000	65,900	54,629	55,000	55,000
Argentina	32,000	20,500	37,000	40,000	31,000	40,000
Afghanistan	24,000	31,000	37,000	35,000	26,000	30,000
Australia	12,500	10,000	12,000	15,000	18,000	20,000
Other	21,000	20,000	21,000	19,500	19,000	20,000
Total	1,179,795	1,150,743	1,251,811	1,192,070	1,243,738	1,220,000
Domestic Consumption						
European Union	344,000	330,900	334,800	320,500	339,500	337,000
United States	205,122	215,636	238,039	235,136	214,004	205,000
China	138,200	144,400	186,939	192,400	203,100	200,000
Kazakhstan	6,300	13,200	36,500	42,800	54,500	52,000
Turkey	47,133	58,100	55,225	42,500	50,000	50,000
Japan	29,800	30,000	31,000	31,800	35,500	37,000
Australia	33,600	32,175	27,100	30,100	36,000	36,000
Russia	47,500	34,100	26,600	27,300	30,000	30,000
Brazil	26,000	25,400	23,200	25,800	28,000	28,000
Canada	27,500	28,800	26,100	25,200	27,000	26,000
Other	221,150	216,000	213,900	197,429	219,400	202,500
Total	1,126,305	1,128,711	1,199,403	1,170,965	1,237,004	1,203,500
Ending Stocks						
United States	113,329	120,693	104,944	132,418	103,139	72,139
Turkey	21,167	20,602	28,177	6,177	2,977	10,477
Argentina	0	0	2,000	3,000	1,000	1,000
Chile	375	300	500	500	500	500
Afghanistan	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	134,871	141,595	135,621	142,095	107,616	84,116
Exports						
Turkey	247,200	186,900	259,900	201,800	265,000	240,000
Iran	149,700	130,700	102,200	112,700	134,000	140,000
United States	123,899	159,389	127,279	114,497	127,054	120,000
Uzbekistan	20,000	15,700	49,400	67,300	70,000	72,000
Chile	67,150	66,000	62,000	55,600	57,000	59,000
South Africa	31,900	35,050	52,900	47,000	47,000	47,000
Argentina	29,050	16,300	29,700	34,200	28,000	35,000
Other	65,300	78,700	70,000	79,100	51,300	65,500
Total	734,199	688,739	753,379	712,197	779,354	778,500
Imports						
European Union	340,200	328,900	332,800	321,600	337,000	335,000
Kazakhstan	6,300	13,200	36,500	42,800	54,500	52,000
Japan	29,800	30,000	31,000	31,800	35,500	37,000
China	20,900	18,700	29,339	33,600	35,500	35,000
Russia	47,500	34,100	26,600	27,300	30,000	30,000
Brazil	26,000	25,400	23,200	25,800	28,000	28,000
Canada	27,500	28,800	26,100	25,200	27,000	26,000
Iraq	20,900	18,300	14,100	16,300	23,500	22,000
Australia	23,800	24,375	19,200	20,300	22,000	21,000
United Arab Emirates	22,100	23,300	19,700	17,500	22,000	21,000
Other	134,718	128,356	136,458	135,366	123,141	131,500
Total	699,718	673,431	694,997	697,566	738,141	738,500

The marketing year begins in August of the first year for Northern Hemisphere countries and January of the second year for Southern Hemisphere countries.