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Raisin Administrative Committee
MARKETING POLICY &
INDUSTRY STATISTICS
2018

Raisin Administrative Committee

Marketing Policy & Industry Statistics 2018 – 2019 Marketing Season

As Presented to the Marketing Subcommittee
and Approved by the RAC on October 18, 2018
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.**

0 tons of Natural Seedless raisins were being held on Memorandum Storage as of July 31, 2018.

(B) **Tonnage held by handlers.**

Packer inventory of raisins as of July 31, 2018, with comparative tonnages for July 31, 2017 was as follows:

	<i>PACKER INVENTORY *</i> <i>as of 07/31/17</i> <i>Held Locally</i>	<i>PACKER INVENTORY *</i> <i>as of 07/31/18</i> <i>Held Locally</i>
Natural Seedless	121,135	79,255
Dipped Seedless	1,290	1,423
Golden Seedless	6,224	6,382
Zante Currant	1,666	761
Sultana	6	6
Muscat	24	24
Monukka	114	95
Other Seedless	6,289	7,106
Other Seedless Sulfured	948	864
TOTAL	137,696	95,916

* Includes packed and unpacked in sweatbox tons

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

	Free Tonnage	Unreleased Reserve	Total
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
2018-19	79,255	0	79,255
10 Year Average	120,448	1,223	121,671

(C) **Estimated tonnage held by Committee as of August 1, 2018.**

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 2018 crop harvest timing is normal. The quality appears to be good with very little off grade fruit.
- (B)** During the 2017-18 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 2018-2019 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 18, 2018 to establish the estimated production for the 2018/19 crop year.

The 2018 crop is expected to be larger than the 2017 crop by approximately 15%. Favorable weather during the growing season and almost no process control combined to improve the crop size. Also, bunch counts indicate a crop that will be 9+ green tons per acre. However, this larger yield per acre will be offset by additional vine pullouts that took place after the 2017 crop harvest.

Varietal Type	Estimated Production
Natural Seedless ⁺	250,000 +/- 10,000
Dipped Seedless	1,800
Golden Seedless	19,000
Zante Currant	2,000
Sultana	30
Muscat	0
Monukka	70
Other Seedless	12,000
Other Seedless Sulf.	300

⁺ 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 2018 August 1 grape estimate and the 2017 and 2016 final grape crops (in green tons) are as follows:

Varietal Type	<i>2018 est.</i>	Final	
		2017	2016
Wine	4,100,000	4,000,000	3,900,000
Table	1,250,000	1,150,000	1,250,000
Raisin	1,400,000	1,450,000	1,750,000
Total	6,750,000	6,600,000	6,900,000

Source: USDA Crop Production, August 10, 2018

(B) Estimate of Tunnel Dehydrated Raisin Production.

Production of Golden Seedless raisins in the 2017-2018 crop year was 19,303 swb tons. The carry-over from that year was 6,382 tons. Dipped Seedless production in 2017-2018 was 2,021 tons with a carry-over of 1,423 tons. The Committee will determine a 2018-19 crop estimate for Golden Seedless and Dipped Seedless raisins. (See chart on page 2)

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

Good growing conditions and favorable drying weather will result in high quality raisins with little need for off-grade process control.

(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:

<i>Domestic & Canadian Markets</i>					
Packed Tons					
Varietal Type	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless	202,809	189,725	182,140	196,303	162,078
Dipped Seedless	3,056	1,547	4,084	1,617	1,481
Golden Seedless	11,928	13,263	13,364	13,748	12,634
Zante Currants	1,439	1,394	1,247	1,500	1,491
Sultanas	53	23	45	37	41
Muscats	0	0	0	0	0
Monukkas	94	54	43	107	42
Other Seedless	6,353	7,210	11,439	9,441	7,149
Other Seedless Sulf.	401	212	535	406	391
Total	226,133	213,428	212,897	223,159	185,307
Five-Yr. Average					212,185

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

<i>Export Markets</i>					
Packed Tons					
Varietal Type	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless	142,757	111,407	98,523	108,503	88,098
Dipped Seedless	499	249	547	103	51
Golden Seedless	5,701	5,393	4,769	5,923	4,535
Zante Currants	1,434	1,053	1,215	999	1,147
Sultanas	0	0	0	0	0
Muscats	0	0	0	0	0
Monukkas	0	0	0	2	0
Other Seedless	2,050	1,206	1,020	1,947	1,808
Other Seedless Sulf.	61	86	52	65	27
Total	152,502	119,394	106,126	117,542	95,666
Five-Yr. Average					118,246

(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.

2017-2018 reported 88,098 packed tons of California Natural Seedless raisins exported compared to 108,503 packed tons in 2016-17. This is a decrease in export of 20,406 packed tons.

The following table shows the shipments of raisins on a packed weight basis for the 2017-2018 crop year.

Countries of Destination	Natural Seedless	Golden Seedless	Other
Australia	212	98	110
Belgium	133	0	0
China*	6,916	0	451
Denmark	1,226	0	1
Finland	1,212	0	0
France	45	0	0
Germany	5,944	0	18
Hong Kong	1,303	89	225
Indonesia	1,246	101	197
Israel	363	1,388	66
Japan	31,639	45	853
Malaysia	1,696	690	66
Mexico	1,305	100	75
Netherlands	1,405	0	0
New Zealand	795	39	25
Norway	2,271	0	0
Philippines	4,069	19	5
Singapore	1,162	146	44
Ireland	113	0	0
South Korea	3,727	0	18
Sweden	3,275	0	5
Taiwan	3,828	129	16
Thailand	2,278	121	0
United Kingdom	5,535	64	507
Russia	0	0	0
Latin America	3,372	28	25
All Other Markets	3,028	1,478	326
TOTAL	88,098	4,535	3,033

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

(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 2018-2019 Crop

Natural Seedless	\$ _____	<i>Per Pound</i>
Dipped Seedless	\$ _____	<i>Per Ton</i>
Golden Seedless	\$ _____	<i>Per Ton</i>
Zante Currants	\$ 2,500.00	<i>Per Ton</i>
Sultanas	\$ _____	<i>Per Ton</i>
Muscats	\$ _____	<i>Per Ton</i>
Monukkas	\$ _____	<i>Per Ton</i>
Other Seedless	\$ _____	<i>Per Ton</i>
Other Seedless Sulf.	\$ _____	<i>Per Ton</i>

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

Natural Seedless	\$ _____	<i>Per Ton</i>
Dipped Seedless	\$ _____	<i>Per Ton</i>
Golden Seedless	\$ _____	<i>Per Ton</i>
Zante Currants	\$ _____	<i>Per Ton</i>
Other Seedless	\$ _____	<i>Per Ton</i>

(8) THE TREND AND LEVEL OF CONSUMER INCOME.

The U.S. economy continues to maintain strong momentum headed into fall 2018. Nonfarm employment growth, consumer spending and capital goods orders suggest real GDP will grow at around a 3% pace during the third quarter, and we expect growth will remain close to that pace through 2019. Our forecast now extends through 2020, where we see growth moderating somewhat to 2.2%. The current expansion will become the longest on record if growth continues into the second half of 2019.

From a bottom up perspective, the economy looks incredibly sound. Strong job growth, higher asset prices and a relatively high saving rate should continue to support consumer spending. Business fixed investment also looks set to grow solidly, with an emphasis on productivity enhancing investment. Inventories are relatively low and government spending looks set to improve modestly in coming quarters.

Forecasting economic growth this far into a business cycle is a bit perilous. Recessions are hard to see, even in real time, and even harder to predict several quarters into the future. Reforms enacted in the aftermath of the financial crisis and the generally slow start to the economic expansion have created a great deal of resiliency, and few of the obvious excesses that typically have preceded past recessions are present today. We expect the Fed to continue nudging interest rates up a quarter point higher each quarter until the second half of 2019, when we believe the funds rate will be above its neutral rate. The yield curve is expected to remain positive, however, as long-term rates rise modestly.

*Source: Wells Fargo Monthly Outlook, US Overview;
September 12, 2018*

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.**

The Raisin Bargaining Association reached an agreement with all the raisin handlers at a grower field price of \$1,800 per ton for the 2017 crop compared to \$1,100 per ton in 2016. This increase in grower price and reduced crop size influenced the reduction of raisins shipped.

Industry shipments were down 18% for natural seedless overall; -19% in export and -17% domestic. Given an anticipated increase in crop size, and despite the decreased carry in, we expect shipments to increase for 2018.

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.

	13-14	14-15	15-16	16-17	17-18
Natural Seedless	0.952	0.943	0.928	0.952	0.953
Dipped Seedless	0.688	0.763	0.945	0.853	0.812
Golden Seedless	0.918	0.873	0.917	0.932	0.895
Zante Currants	0.854	0.744	0.867	0.863	0.867
Sultanas	0.691	0.705	0.949	0.931	0.967
Muscats	1.000	1.000	1.000	1.000	1.000
Monukkas	0.806	0.641	1.286	0.819	0.706
Other Seedless	0.958	0.845	0.940	0.946	0.943
Other Seedless Sulf.	0.964	0.532	1.617	0.771	0.839

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Table 1

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

Year	BEARING ACREAGE				Fresh Grape Production (tons)	Yield Per Acre (tons)
	Total	Wine	Table	Raisins		
2009	789,000	489,000	84,000	216,000	6,548,000	8.30
2010*	789,000	489,000	84,000	216,000	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
2018	829,000	560,000	111,000	158,000	6,482,000	7.82
TEN YEAR AVERAGE						
	817,000	525,900	96,200	194,900	6,755,200	8.27

Source: Agricultural Statistics Board NASS, USDA - June 2018

*Numbers were updated June of 2018

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
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
2017	51,000	39,000	10,000	2,000
TEN YEAR AVERAGE				
	55,800	42,300	10,700	2,800

Source: CA Grape Acreage Report, April 2018

Table 2

**California Total Annual Grape Production
By Varietal Type and Utilization
2013-2017
(Fresh Tons)**

Varietal Type	2013-2014 Crop		2014-2015 Crop		2015-2016 Crop		2016-2017 Crop		2017-2018 Crop	
	Tons	%	Tons	%	Tons	%	Tons	%	Tons	%
Raisins										
Dried	1,831,000	81.41	1,544,000	87.58	1,858,000	92.58	1,390,000	90.49	1,141,000	89.98
Crushed	328,000	14.58	155,000	8.79	92,000	4.58	98,000	6.38	95,000	7.49
Canned	25,000	1.11	21,000	1.19	22,000	1.10	19,000	1.24	16,000	1.26
Fresh Sales	65,000	2.89	43,000	2.44	35,000	1.74	29,000	1.89	16,000	1.26
Total Production	2,249,000	28.93	1,763,000	25.95	2,007,000	29.35	1,536,000	22.99	1,268,000	19.56
Wine										
Crushed	4,245,000	100.00	3,893,000	100.00	3,705,000	100.00	4,031,000	100.00	4,014,000	100.00
Fresh Sales	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Production	4,245,000	54.61	3,893,000	57.29	3,705,000	54.19	4,031,000	60.33	4,014,000	61.93
Table										
Dried	53,000	4.14	68,000	5.83	61,000	5.37	54,000	4.66	57,000	4.75
Crushed	180,000	14.07	95,000	8.15	71,000	6.26	98,000	8.46	132,000	11.00
Fresh Sales	1,046,000	81.78	1,003,000	86.02	1,003,000	88.37	1,007,000	86.89	1,011,000	84.25
Total Production	1,279,000	16.45	1,166,000	17.16	1,135,000	16.60	1,159,000	17.35	1,200,000	18.51
Total Grape										
Dried	1,884,000	24.24	1,612,000	23.72	1,919,000	28.07	1,444,000	21.61	1,198,000	18.48
Crushed	4,753,000	61.15	4,143,000*	60.57	3,868,000*	56.43	4,227,000*	62.60	4,241,000	65.43
Canned	25,000	0.32	21,000	0.31	22,000	0.32	19,000	0.28	16,000	0.25
Fresh Sales	1,111,000	14.29	1,046,000	15.39	1,038,000	15.18	1,036,000	15.50	1,027,000	15.84
Total Production	7,773,000	100.00	6,822,000*	100.00	6,847,000*	100.00	2,499,000*	100.00	6,482,000	100.00

*Numbers were updated June of 2018

Percentages in Relation to Total Annual Production and Type of Production

Source: Agricultural Statistics Board NASS, USDA, Noncitrus Fruits and Nuts - June 2018. Percentages computed by the RAC.

Table 3

**Raisin Deliveries By Varietal Types
2008-2017
(Sweatbox Tons)**

Varietal Type	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless	364,268	298,532	354,878	346,132	311,090	364,794	303,890	336,697	281,496	220,583
Dipped Seedless	4,845	3,827	4,440	2,352	3,644	4,925	3,947	2,926	2,348	2,021
Golden Seedless	19,782	17,008	21,827	21,960	17,340	21,402	19,128	21,110	20,761	19,303
Zante Currants	2,912	2,708	3,468	3,167	2,976	2,885	3,084	3,091	2,569	2,136
Sultanas	67	63	66	76	68	58	59	33	27	42
Muscat	5	8	5	3	0	0	24	0	0	0
Monukka	287	155	140	130	111	85	73	70	73	40
Other Seedless	6,529	7,304	11,351	9,035	9,655	10,469	13,865	11,065	10,839	10,338
Other Seedless, Sulf.	521	413	808	471	381	530	424	457	885	417
TOTALS	399,217	330,018	396,983	383,326	345,265	405,148	344,494	375,449	318,998	254,880

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Table 3A**Top 20 Destinations for Crop Year 2017-2018
Natural Seedless
(Packed Tons)**

YTD Rank	Destination	YTD Tonnage 8/01/17-7/31/18	Previous YTD tonnage 8/01/16-7/31/17
1	United States	153,605	185,634
2	Japan	31,639	29,449
3	Canada	8,473	10,669
4	China*	6,916	8,988
5	Germany	5,944	12,105
6	United Kingdom	5,535	8,668
7	Philippines	4,069	3,505
8	Taiwan	3,828	4,481
9	South Korea	3,727	4,081
10	Sweden	3,275	3,606
11	Thailand	2,278	3,976
12	Norway	2,271	2,641
13	Malaysia	1,696	1,737
14	Netherlands	1,405	2,685
15	Mexico	1,305	2,407
16	Hong Kong	1,303	1,540
17	Indonesia	1,246	1,512
18	Denmark	1,226	1,772
19	Finland	1,212	1,153
20	Singapore	1,162	1,338

*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)**

<i>Country of Destination</i>	2016-2017	2017-2018	Percent Gain/Loss (2016-2017=100%)
<i>European Countries</i>			
Austria	127	20	-84.38%
Belgium	603	133	-77.89%
Denmark	1,772	1,226	-30.79%
Ireland	422	113	-73.12%
Finland	1,153	1,212	5.09%
France	82	45	-44.62%
Germany	12,105	5,944	-50.90%
Israel	738	363	-50.80%
Italy	23	31	33.33%
Netherlands	2,685	1,405	-47.70%
Norway	2,641	2,271	-14.04%
Spain	258	252	-2.22%
Sweden	3,606	3,275	-9.17%
Switzerland	44	44	0.00%
United Kingdom	8,668	5,535	-36.14%
Total European Countries	34,927	21,869	-37.39%
<i>Latin American Republics</i>			
Brazil	306	77	-74.90%
Colombia	693	654	-5.58%
Costa Rica	463	438	-5.43%
Dominican Republic	1,194	997	-16.44%
Ecuador	1	0	-100.00%
Mexico	2,407	1,305	-45.78%
Panama	567	482	-14.91%
Puerto Rico	0	0	0.00%
Venezuela	0	0	0.00%
Others	997	724	-27.43%
Total Latin American Republics	6,628	4,677	-29.43%
<i>Other Countries</i>			
Australia	2,119	212	-89.99%
China	8,988	6,916	-23.05%
Hong Kong	1,540	1,303	-15.33%
Iceland	245	197	-19.63%
Indonesia	1,512	1,246	-17.62%
Japan	29,449	31,639	7.43%
South Korea	4,081	3,727	-8.67%
Malaysia	1,737	1,696	-2.32%
New Zealand	1,174	795	-32.34%
USSR - Russia	0	0	0.00%
Philippines	3,505	4,069	16.11%
Singapore	1,338	1,162	-13.13%
Taiwan	4,481	3,828	-14.58%
Thailand	3,976	2,278	-42.72%
Others	2,803	2,484	-11.40%
Total Other Countries	66,948	61,552	-8.06%
GRAND TOTAL	108,503	88,098	-18.81%

Table 4 ZC

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

<i>Country of Destination</i>	2016-2017	2017-2018	Percent Gain/Loss (2016-2017=100%)
<u>European Countries</u>			
Austria	0	2	100.00%
Belgium	0	0	0.00%
Denmark	1	1	0.00%
Ireland	0	0	0.00%
Finland	0	0	0.00%
France	0	0	0.00%
Germany	0	18	100.00%
Israel	0	21	100.00%
Italy	0	0	0.00%
Netherlands	0	0	0.00%
Norway	0	0	0.00%
Spain	0	0	0.00%
Sweden	11	5	-51.98%
Switzerland	0	0	0.00%
United Kingdom	0	0	0.00%
Total European Countries	12	47	291.68%
<u>Latin American Republics</u>			
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	1	0	-100.00%
Panama	0	0	0.00%
Puerto Rico	0	0	0.00%
Venezuela	0	0	0.00%
Others	0	0	0.00%
Total Latin American Republics	1	0	-100.00%
<u>Other Countries</u>			
Australia	0	0	0.00%
China	471	398	-15.44%
Hong Kong	20	0	-100.00%
Iceland	0	0	0.00%
Indonesia	63	158	152.62%
Japan	328	441	34.66%
South Korea	10	18	77.54%
Malaysia	19	12	-40.65%
New Zealand	10	5	-53.73%
USSR - Russia	4	0	-100.00%
Philippines	7	5	-37.07%
Singapore	31	24	-22.81%
Taiwan	0	6	100.00%
Thailand	0	0	0.00%
Others	23	33	45.57%
Total Other Countries	986	1,100	11.64%
GRAND TOTAL	999	1,147	14.84%

RAC - September 2018

Table 4A

Free Tonnage Export Shipments
(Excluding Canada)
Natural Seedless Raisins
2013 - 2017
(Packed Tons)

	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
August	9,980	11,560	8,212	10,167	10,185
September	10,547	10,480	8,749	8,980	7,199
October	12,084	10,314	9,302	7,695	7,760
November	10,462	7,051	6,807	8,345	8,692
December	12,396	9,935	8,521	9,259	8,456
January	12,088	5,712	7,012	8,445	7,639
February	12,174	8,542	7,530	8,968	6,218
March	13,113	11,883	7,233	10,506	7,399
April	13,119	10,625	8,525	9,048	6,662
May	13,051	8,174	8,725	9,667	7,231
June	12,426	7,840	9,585	9,008	5,440
July	11,317	9,291	8,322	8,415	5,217
TOTAL YEAR	142,757	111,407	98,523	108,503	88,098

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Table 4B

Free Tonnage Export Shipments
(Excluding Canada)
Zante Currant Raisins
2013 - 2017
(Packed Tons)

	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
August	106	207	128	115	135
September	125	52	151	76	25
October	128	155	66	68	218
November	124	72	65	15	50
December	68	45	86	144	138
January	119	69	67	90	95
February	150	47	101	28	91
March	71	132	81	62	26
April	184	62	100	122	47
May	67	91	130	93	164
June	179	76	123	95	73
July	113	45	117	91	85
TOTAL YEAR	1,434	1,053	1,215	999	1,147

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Table 5

Free Tonnage Shipments To Domestic And Canadian Markets
(Including Government)
Natural Seedless Raisins
2013 - 2017
(Packed Tons)

	2013-2014		2014-2015		2015-2016		2016-2017		2017-2018	
	Tons	%								
August										
Packed	4,900	31	4,779	26	4,269	30	4,950	33	5,723	31
Bulk	10,656	69	13,588	74	9,775	70	9,995	67	13,031	69
TOTAL	15,556	100	18,367	100	14,044	100	14,945	100	18,754	100
September										
Packed	5,204	35	5,489	32	5,651	36	5,524	34	5,384	36
Bulk	9,791	65	11,494	68	10,029	64	10,489	66	9,665	64
TOTAL	14,995	100	16,983	100	15,680	100	16,013	100	15,049	100
October										
Packed	6,871	38	7,364	39	6,313	36	6,555	39	6,296	37
Bulk	11,232	62	11,357	61	11,228	64	10,325	61	10,846	63
TOTAL	18,103	100	18,721	100	17,541	100	16,880	100	17,142	100
November										
Packed	6,469	39	5,333	39	5,177	30	4,817	30	5,392	35
Bulk	10,171	61	8,470	61	11,958	70	11,163	70	10,204	65
TOTAL	16,640	100	13,803	100	17,135	100	15,980	100	15,596	100
December										
Packed	5,353	36	5,305	34	5,763	34	4,373	28	4,347	33
Bulk	9,488	64	10,140	66	11,131	66	11,108	72	8,743	67
TOTAL	14,841	100	15,445	100	16,894	100	15,481	100	13,090	100
January										
Packed	5,126	31	4,781	33	4,853	29	4,611	27	4,076	30
Bulk	11,316	69	9,685	67	11,967	71	12,572	73	9,430	70
TOTAL	16,442	100	14,466	100	16,820	100	17,183	100	13,506	100
February										
Packed	5,290	35	5,053	35	4,797	30	4,259	26	4,113	34
Bulk	9,814	65	9,522	65	11,304	70	11,982	74	7,827	66
TOTAL	15,104	100	14,575	100	16,101	100	16,241	100	11,940	100
March										
Packed	5,747	34	6,317	36	5,120	33	5,003	29	4,141	30
Bulk	11,031	66	11,287	64	10,337	67	12,112	71	9,580	70
TOTAL	16,778	100	17,604	100	15,457	100	17,115	100	13,721	100
April										
Packed	5,367	28	4,990	31	3,902	29	4,304	28	3,752	30
Bulk	13,585	72	11,309	69	9,361	71	11,299	72	8,571	70
TOTAL	18,952	100	16,299	100	13,263	100	15,603	100	12,323	100
May										
Packed	4,580	24	4,277	29	3,970	29	4,047	24	3,120	28
Bulk	14,863	76	10,349	71	9,521	71	13,011	76	7,880	72
TOTAL	19,443	100	14,626	100	13,491	100	17,058	100	11,000	100
June										
Packed	4,579	27	3,874	27	3,744	29	4,011	23	3,519	33
Bulk	12,374	73	10,620	73	9,325	71	13,705	77	7,287	67
TOTAL	16,953	100	14,494	100	13,069	100	17,716	100	10,806	100
July										
Packed	4,862	26	4,071	28	4,050	32	3,694	23	2,673	29
Bulk	14,140	74	10,271	72	8,595	68	12,394	77	6,478	71
TOTAL	19,002	100	14,342	100	12,645	100	16,088	100	9,151	100
TOTAL YEAR										
Packed	64,348	32	61,633	32	57,609	32	56,148	29	52,536	32
Bulk	138,461	68	128,092	68	124,531	68	140,155	71	109,542	68
TOTAL	202,809	100	189,725	100	182,140	100	196,303	100	162,078	100

Table 6

**Free Tonnage Shipments To All Market Outlets
2010 - 2017
(Sweatbox Tons)**

Variety	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless								
Domestic & Canada	191,211	196,682	194,950	213,084	201,238	196,238	206,288	170,004
Export Free	136,982	127,808	115,031	149,989	118,167	106,149	114,021	92,406
Total	328,193	324,490	309,981	363,073	319,405	302,387	320,309	262,410
Dipped Seedless								
Domestic & Canada	5,397	1,876	3,195	4,441	2,027	4,322	1,895	1,824
Export Free	34	184	585	724	326	579	122	63
Total	5,431	2,060	3,780	5,165	2,353	4,901	2,017	1,887
Golden Seedless								
Domestic & Canada	14,066	13,419	13,697	12,988	15,194	14,569	14,750	14,118
Export Free	6,521	5,828	5,392	6,208	6,178	5,198	6,355	5,068
Total	20,587	19,247	19,089	19,196	21,372	19,767	21,105	19,186
Zante Currants								
Domestic & Canada	1,307	1,448	1,777	1,684	1,873	1,437	1,738	1,718
Export Free	1,205	1,089	1,458	1,680	1,415	1,401	1,157	1,322
Total	2,512	2,537	3,235	3,364	3,288	2,838	2,895	3,040
Sultanas								
Domestic & Canada	57	60	64	76	32	48	40	42
Total	57	60	64	76	32	48	40	42
Muscats								
Domestic & Canada	2	0	23	0	0	0	0	0
Export Free	0	0	0	0	0	0	0	0
Total	2	0	23	0	0	0	0	0
Monukka Type								
Domestic & Canada	109	126	108	117	84	34	131	60
Export Free	0	0	0	0	0	0	3	0
Total	109	126	108	117	84	34	134	60
Other Seedless								
Domestic & Canada	9,374	6,283	7,873	6,634	8,533	12,171	9,980	7,583
Export Free	1,482	2,659	1,559	2,140	1,427	1,086	2,058	1,918
Total	10,856	8,942	9,432	8,774	9,960	13,257	12,038	9,501
Other Seedless Sulfured								
Domestic & Canada	456	430	311	416	399	331	526	466
Export Free	166	100	59	64	161	32	85	32
Total	622	530	370	479	560	363	611	498
TOTAL ALL VARIETIES	368,369	357,992	346,082	400,244	357,054	343,595	359,149	296,624

Table 6A

**Free Tonnage Shipments To All Market Outlets
2010 - 2017
(Packed Tons)**

Variety	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless								
Domestic & Canada	180,344	183,703	184,417	202,809	189,725	182,140	196,303	162,078
Export Free	129,198	119,373	108,816	142,757	111,407	98,523	108,503	88,098
Total	309,542	303,076	293,233	345,566	301,132	280,663	304,806	250,176
Dipped Seedless								
Domestic & Canada	4,803	1,618	2,847	3,056	1,547	4,084	1,617	1,481
Export Free	30	158	522	499	249	547	103	51
Total	4,833	1,776	3,369	3,555	1,796	4,631	1,720	1,532
Golden Seedless								
Domestic & Canada	12,614	11,986	12,486	11,928	13,263	13,364	13,748	12,634
Export Free	5,848	5,206	4,915	5,701	5,393	4,769	5,923	4,535
Total	18,462	17,192	17,401	17,629	18,656	18,133	19,671	17,169
Zante Currants								
Domestic & Canada	1,090	1,205	1,501	1,439	1,394	1,247	1,500	1,491
Export Free	1,003	905	1,231	1,434	1,053	1,215	999	1,147
Total	2,093	2,110	2,732	2,873	2,447	2,462	2,499	2,638
Sultanas								
Domestic & Canada	37	58	57	53	23	45	37	41
Total	37	58	57	53	23	45	37	41
Muscats								
Domestic & Canada	2	0	0	0	0	0	0	0
Export Free	0	0	0	0	0	0	0	0
Total	2	0						
Monukka Type								
Domestic & Canada	101	142	71	94	54	43	107	42
Export Free	0	0	0	0	0	0	2	0
Total	101	142	71	94	54	43	109	42
Other Seedless								
Domestic & Canada	7,237	5,750	7,114	6,353	7,210	11,439	9,441	7,149
Export Free	1,144	2,434	1,409	2,050	1,206	1,020	1,947	1,808
Total	8,381	8,184	8,523	8,403	8,416	12,459	11,388	8,957
Other Seedless Sulfured								
Domestic & Canada	396	450	328	401	212	535	406	391
Export Free	144	105	62	61	86	52	65	27
Total	540	555	390	462	298	587	471	418
TOTAL ALL VARIETIES	343,991	333,093	325,776	378,635	332,822	319,023	340,701	280,973

Table 7

**Free Tonnage Shipments To Domestic And Canadian Markets
(Including Government)
Natural Seedless Raisins
2002 - 2017
(Packed Tons)**

Crop Year	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Total
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
*2017-18	18,754	15,049	17,142	15,596	13,090	13,506	11,940	13,721	12,323	11,000	10,806	9,151	162,078
TEN YEAR AVERAGE	16,051	16,004	17,602	16,151	15,009	15,418	14,580	16,393	15,360	14,819	14,263	14,312	185,962

* No Pool Established

Table 8

**Free Tonnage Made Available For Disposition In Commercial Trade Channels
Natural Seedless Raisins
2008 - 2017
(Sweetbox Tons)**

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Natural Seedless Total Deliveries	364,268	298,532	354,878	346,132	311,090	364,794	303,890	336,697	281,496	220,583
Free Tonnage Purchase^c	316,913	253,752	354,878	346,132	311,090	364,794	303,890	336,697	281,496	220,583
Reserve Tonnage Purchased (a)	35,844	56,798	64	0						
Total Tonnage Purchase^c	352,757	310,550	354,942	346,132	311,090	364,794	303,890	336,697	281,496	220,583
Packers' August 1 Carryin (b)	106,249	126,824	83,143	110,206	132,061	132,407	138,215	122,954	158,287	121,135
Total Disposable Tonnage^c	459,006	437,374	438,085	456,338	443,151	497,201	442,105	459,651	439,783	341,718
Commercial Shipments	332,362	354,242	328,193	324,490	309,981	363,073	319,405	302,387	320,309	262,410
July 31 Carryout (calculated)	126,645	83,132	109,892	131,848	133,170	134,128	122,700	157,264	119,474	79,308

(a) Export and 10+10

(b) Packers' Carryin Inventory Report

Table 9

**SUPPLY AND DISPOSITION
NATURAL SEEDLESS RAISINS
2008-2017
(Sweatbox Tons)**

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
Total Disposable Free Tonnage	459,006	437,374	438,085	456,338	443,151	497,201	442,105	459,651	439,783	341,718
Disposition										
Domestic & Canada	200,775	194,879	191,211	196,682	194,950	213,084	201,238	196,238	206,288	170,004
Export Free	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021	92,406
Total Disposition	332,362	354,242	328,193	324,490	309,981	363,073	319,405	302,387	320,309	262,410
Carryout (Calculated)	126,644	83,132	109,892	131,848	133,170	134,128	122,700	157,264	119,474	79,308
Reserve Tonnage										
Total Available Supply	48,002	56,934	71	2	0	0	0	0	0	0
Released for Export*	25,438	11,604	0	0	0	0	0	0	0	0
Other Disposition	22,564	45,330	71	2	0	0	0	0	0	0
Exports										
Free Tonnage	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021	92,406
Reserve Shipments	0	0	0	0	0	0	0	0	0	0
Total Exports	131,587	159,363	136,982	127,808	115,031	149,989	118,167	106,149	114,021	92,406

* Raisin-Back

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Table 10

**Supply And Disposition Of Reserve Pool Tonnage
Natural Seedless Raisins
2010-2017
(Sweatbox Tons)**

	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	2017-2018 Crop Year
SUPPLY								
Reserve Tonnage	0	0	0	0	0	0	0	0
Carry In From Previous Year	71	2	0	0	0	0	0	0
Total Reserve Supply	71	2	0	0	0	0	0	0
DISPOSITION								
10 & 10**	64	0	0	0	0	0	0	0
Export*	0	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	3	2	0	0	0	0	0	0
Miscellaneous	2	0	0	0	0	0	0	0
Carry Out To Subsequent Year	2	0	0	0	0	0	0	0
Total Disposition	71	2	0	0	0	0	0	0

** Includes all Reserve for Free Usage Sales

* Raisin-Back

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Table 11

**Reserve Pool Percentages
Natural Seedless Raisins
2003-2017**

Crop Year	Preliminary Percentages		Secretary Established		Date Established	Basis for Pool Payments	
	Free	Reserve	Free	Reserve		Free	Reserve
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
2017-18	100	0	100	0	08/16/18	100	0

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Table 12

**Comparison Of Packer Acquisitions By Week
Natural Seedless Raisins
2013-2017
(Sweatbox Tons)**

Week of Delivery	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
1	8	1,423	1,306	4	307
2	29	0	650	504	228
3	50	562	0	0	216
4	11	730	107	23	344
Comparative 4 Week Total	98	2,715	2,063	531	1,095
5	420	438	674	120	282
6	3,986	3,625	3,168	917	915
7	8,785	10,997	5,680	2,580	1,118
8	16,960	15,321	9,446	7,998	2,141
9	20,481	20,005	12,012	14,228	4,001
Comparative 5 Week Total	50,632	50,386	30,980	25,843	8,457
10	21,172	20,469	14,251	16,352	5,749
11	26,995	26,703	16,735	21,722	9,928
12	27,254	22,334	17,538	23,582	22,277
13	22,268	17,301	19,084	21,028	11,201
Comparative 4 Week Total	97,689	86,807	67,608	82,684	49,155
14	23,259	17,464	11,388	15,424	16,045
15	15,568	31,879	19,389	13,173	14,940
16	15,611	10,670	17,266	17,988	9,619
17	36,395	17,157	5,250	3,163	10,503
Comparative 4 Week Total	90,833	77,170	53,293	49,748	51,107
18	17,898	4,238	14,692	8,244	7,450
19	7,788	10,207	8,922	5,525	7,438
20	6,693	9,115	11,579	6,323	6,351
21	2,146	1,850	2,910	2,763	4,011
22	2,132	1,850	3,728	970	2,097
Comparative 5 Week Total	36,657	27,260	41,831	23,825	27,347
23	4,690	4,888	15,773	948	5,458
24	21,407	2,796	6,823	15,362	3,980
25	3,273	3,532	6,956	2,564	5,233
26	2,993	1,537	9,806	2,975	13,955
Comparative 4 Week Total	32,363	12,753	39,358	21,849	28,626
27	3,615	10,417	4,385	9,805	5,202
28	5,203	1,706	5,196	17,941	3,066
29	2,176	2,056	8,107	2,671	2,601
30	2,957	2,642	2,870	4,711	3,786
Comparative 4 Week Total	13,951	16,821	20,558	35,128	14,655

Table 12 (cont.)

**Comparison Of Packer Acquisitions By Week
Natural Seedless Raisins
2013-2017
(Sweatbox Tons)**

Page 2 of 2

Week of Delivery	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
31	3,739	1,459	10,078	2,820	2,861
32	3,453	7,546	4,260	3,160	3,858
33	3,963	655	2,992	1,510	1,784
34	2,342	1,587	4,416	6,113	1,474
Comparative 4 Week Total	13,497	11,247	21,746	13,603	9,977
35	7,809	788	2,685	840	4,658
36	705	427	18,834	588	4,931
37	1,453	2,990	(8,020)	370	1,371
38	2,438	2,961	16,216	516	956
39	1,043	2,344	2,495	1,298	3,206
Comparative 5 Week Total	13,448	9,510	32,210	3,612	15,122
40	1,889	1,428	4,152	153	2,633
41	1,488	1,922	2,244	217	894
42	1,452	1,887	792	1,009	457
43	1,841	(1,971)	5,664	2,362	2,376
Comparative 4 Week Total	6,670	3,266	12,852	3,741	6,360
44	1,666	109	1,611	9,982	506
45	1,168	988	2,174	716	664
46	1,395	1,320	6,159	2,112	732
47	1,248	1,287	1,307	1,647	1,495
Comparative 4 Week Total	5,477	3,704	11,251	14,457	3,397
48	538	44	723	1,282	1,905
49	744	699	672	1,259	534
50	777	1,160	83	395	1,269
51	218	53	6	(6)	1,068
52	1,202	295	1,463	3,545	509
Comparative 5 Week Total	3,479	2,251	2,947	6,475	5,285
YEARLY TOTAL	364,794	303,890	336,697	281,496	220,583

RAC - September 2018

Table 13

**Free Tonnage Supply And Demand Situation
Natural Seedless Raisins
2003-2017
(Sweatbox Tons)**

Crop Year	S U P P L Y						S H I P M E N T S			
	Acquired	Percent Free	Free Tonnage	Carryin	Purchased From Reserve	Total Free Supply	Canada and Domestic	Export (Free)	Total Disposition	Computed Carryout
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
2017-18	220,583	100.0	220,583	121,135	0	341,718	170,004 ***	92,406	262,410	79,308
TEN YEAR AVERAGE										
	318,236	97 *	309,022	123,148	9,271	441,441	196,535	125,150	321,685	119,756

* Percentage is a weighted average

** Adjusted for exempt tonnage

***Includes Government Free

RAC - September 2018

Table 14

**Calculated Free Tonnage Disappearance
Natural Seedless Raisins
2008-2017
(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)
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%
2017-18	121,135	220,583	79,255	262,463	250,176	4.68%

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

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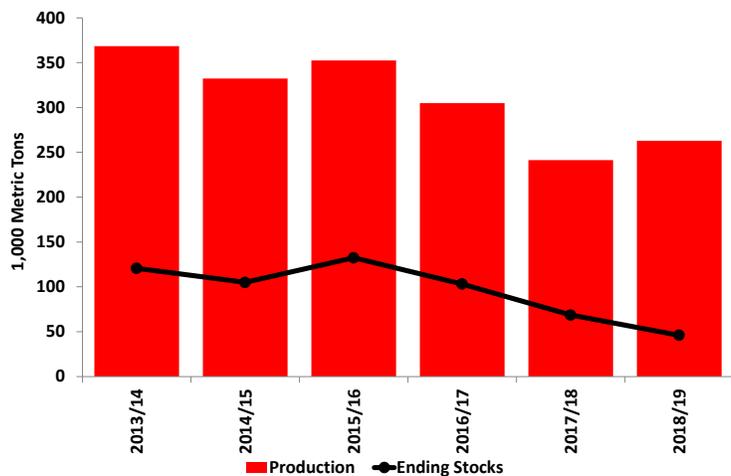
Raisins: World Markets and Trade

Global Raisin Production to Rebound

Global raisin production for 2018/19 is forecast to rebound 5 percent to 1.2 million metric tons (tons) as gains in Iran, the United States, and China more than offset lower output in Turkey. In response to higher supplies, world consumption is expected to rebound 3 percent to 1.2 million tons. However, total ending stocks are expected to tighten a third consecutive year to just 50,000 tons. Global exports are forecast up 4 percent to 779,000 tons, as higher shipments from Iran and Uzbekistan more than offset lower exports from Turkey.

United States production is forecast up 22,000 tons to 263,000. Although the [California Raisin Grape Objective Measurement Report](#) has not been conducted since 2015, the National Agricultural Statistics Service surveyed industry and published a forecast for California’s raisin-type grape production in the August 2018 [Crop Production Report](#). Exports are forecast up 2,500 tons to 110,000 on slightly higher shipments to the European Union. Despite declining 6,000 tons from last year’s record, imports are forecast to remain elevated at 30,000 tons. Ending stocks are expected to plummet one-third to 46,000 tons.

U.S. Ending Stocks to Continue Declining Despite Uptick in Production



China’s production is forecast up 10,000 tons to 190,000 on higher yields following favorable weather in Xinjiang, the largest producing region. Green raisins account for 60 percent of total production and are mostly consumed as snack foods, while dark raisins account for 40 percent of output and are primarily used by low-end bakery shops. Since domestic consumption accounts for a vast majority of the harvest and the country is a net importer, exports are forecast only slightly higher at 20,000 tons.

Turkey’s production is forecast to drop 26,000 tons to 280,000 due to heavy rains and hail damage during the late spring and summer in some districts in Izmir and Manisa Province. Approximately half of raisin output occurs in the districts of Alasehir, Salihli, and Saruhanli in Manisa Province. With lower available supplies, exports are expected down 29,000 tons to 250,000 on smaller shipments to the European Union, its primary market. Almost all raisin exports are the Sultana variety.

Chile’s production and exports are forecast 3,000 tons higher at 60,000 and 58,000 tons, respectively. Most raisins are produced from table grapes in the northern regions of Atacama, Coquimbo, and Valparaiso. Whereas Atacama and Coquimbo received abundant rainfall during 2016/17 that replenished water reservoirs for irrigation, water availability continues to be a problem in Valparaiso. Flame and

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Thompson are the main varieties produced, and key export markets include the European Union, the United States, and Mexico.

South Africa's production is forecast 2,500 tons higher to 73,000 based on increased area and favorable growing conditions. The Thompson variety accounts for over half of output, followed by Sultana and Golden raisins. Sun drying is the most common processing method for Thompson, because it is quick and inexpensive, whereas Golden raisins are usually treated with sulfur dioxide and dried in a ventilated facility. Exports are expected marginally higher to 60,000 tons, with the majority shipped to the European Union.

Argentina's production is forecast to remain nearly unchanged at 42,000 tons 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 1,000 tons to 39,000 on slightly higher shipments to Brazil.

European Union's imports are forecast to gain 12,000 tons to 335,000 on slightly higher shipments from Iran, Uzbekistan, and the United States.

For additional information, please contact Tony Halstead at 202-720-4620, or Tony.Halstead@fas.usda.gov

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Raisin Production, Supply and Distribution for Select Countries

Metric Tons (Dry Weight Basis)

	2013/14	2014/15	2015/16	2016/17	2017/18	Sep 2018/19
Production						
Turkey	242,635	320,000	220,000	310,000	306,000	280,000
United States	368,408	332,211	352,441	304,723	241,402	263,000
China	165,000	180,000	190,000	165,000	180,000	190,000
Iran	160,000	130,000	139,000	170,000	110,000	150,000
South Africa	46,000	65,900	60,000	62,300	70,500	73,000
Uzbekistan	18,000	52,000	70,000	71,000	65,000	70,000
Chile	69,200	65,000	57,000	53,700	57,000	60,000
Argentina	20,500	37,000	40,000	31,000	41,000	42,000
Afghanistan	31,000	37,000	35,000	26,000	36,500	38,000
Australia	10,000	12,000	15,000	18,000	20,000	20,000
Other	20,000	21,000	19,500	19,000	22,000	19,000
Total	1,150,743	1,252,111	1,197,941	1,230,723	1,149,402	1,205,000
Domestic Consumption						
European Union	330,900	334,800	320,500	335,800	327,300	337,000
China	144,400	186,939	192,400	183,100	200,000	206,000
United States	215,636	238,039	235,136	220,909	205,000	205,564
Japan	30,000	31,000	31,800	35,750	39,700	42,000
Australia	32,175	27,100	30,100	38,700	36,000	37,500
Kazakhstan	13,200	36,500	42,800	53,200	32,100	37,000
Turkey	58,100	55,225	42,500	49,200	30,077	31,800
Brazil	25,400	23,200	25,800	27,800	26,800	28,000
Canada	28,800	26,100	25,200	27,000	26,900	28,000
Iran	29,300	27,800	26,300	36,000	24,300	25,000
Other	221,000	212,950	204,425	214,625	195,100	205,100
Total	1,128,911	1,199,653	1,176,961	1,222,084	1,143,277	1,182,964
Ending Stocks						
United States	120,693	104,944	132,418	103,139	68,564	46,000
Argentina	0	2,000	3,000	1,000	1,500	2,000
Turkey	20,602	28,177	6,177	2,977	1,500	1,200
Chile	300	500	500	500	350	550
Afghanistan	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	141,595	135,621	142,095	107,616	71,914	49,750
Exports						
Turkey	186,900	259,900	201,800	265,700	278,900	250,000
Iran	130,700	102,200	112,700	134,000	85,700	125,000
United States	159,389	127,279	114,497	127,114	107,457	110,000
Uzbekistan	15,200	49,800	67,600	68,100	63,000	67,500
South Africa	35,050	52,900	46,500	48,800	58,000	60,000
Chile	66,000	62,000	55,600	51,800	55,000	58,000
Argentina	16,300	29,700	34,200	27,500	38,000	39,000
Other	78,700	70,000	79,100	51,700	62,300	69,500
Total	688,239	753,779	711,997	774,714	748,357	779,000
Imports						
European Union	328,900	332,800	321,600	333,200	323,200	335,000
Japan	30,000	31,000	31,800	35,750	39,700	42,000
Kazakhstan	13,200	36,500	42,800	53,200	32,100	37,000
China	18,700	29,339	33,600	35,500	35,000	36,000
United States	13,981	17,358	24,666	14,021	36,480	30,000
Brazil	25,400	23,200	25,800	27,800	26,800	28,000
Canada	28,800	26,100	25,200	27,000	26,900	28,000
Russia	34,100	26,600	27,300	29,200	24,100	24,000
Australia	24,375	19,200	20,300	24,400	21,000	23,000
India	12,100	16,100	15,500	15,900	18,000	19,000
Other	143,575	137,150	128,925	135,625	123,250	132,800
Total	673,131	695,347	697,491	731,596	706,530	734,800

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