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Dried Fruit
General Summary

In an ironic twist, South Africa's record 1995/96 summer rainfall season had a negative effect on the dried fruit crop. The FAS 95 raisin production, estimated at about 30,000 tons, appears to be down about 22% compared to the previous seasons' 38,540 tons. The 1995 exports did not fare well with the result that there were considerable stocks carried over to 1996. At this stage sales have picked up and the industry is confident that exports could reach 25,000 tons this year. The devaluating South African Rand is having a positive effect on the Rand income from exports.

Rand 1 = U.S. Dollar 0.24 (04/12/96)

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Dried Fruit
Raisins

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                        Global Economic Data Exchange System
Commodity: Raisins (0575200) (1000 HECTARES) (METRIC TONS)
Beg. Month/Year of Marketing Year: 01 / 94                01 / 95                01 / 96
SOUTH AFRICA                Revised 1993                Prelim 1994                Forecast 1995
                        Old                New                Old                New                Old                New
Area Planted                15                15                15                15                0                15
Area Harvested              15                15                15                15                0                15
Beginning Stocks            6485              6485              7732              7732              0                15364
Production                  31742             31742             38518             38540              0                30000
Imports                     0                0                0                0                0                0
TOTAL SUPPLY                38227             38227             46250             46272              0                45364
Exports                     20149             20149             30000             19795              0                25000
Domestic Consumption        10346             10346             10500             11113              0                10500
Ending Stocks               7732              7732              5750              15364              0                9864
TOTAL DISTRIBUTION          38227             38227             46250             46272              0                45364

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PRODUCTION

South Africa's 1995 raisin crop, which is currently still being delivered to the processors, is at this stage expected to reach only about 30,000 metric tons, compared to the 38,540 ton 1994 crop. This decrease was caused by inclement weather. In the desert along the Orange River, where 97% of the raisin crop is produced, some areas still had frost in September, while hail and wind caused damage at a later stage. South Africa had a very good 1995/96 summer rainfall season which also reached the raisin production area causing further damage. The fact that the rains also started early in the season caused damage but it was especially the late rains which really had a negative effect in production. In contrast, quality is fair.

The following table contains the production details:*

Metric tons	FAS 1993	1994	1995**	% Change
Thompsons seedless	20,904	25,591	20,665	-19.25
Unbleached sultanas	5,649	5,890	3,925	-33.3
Goldens	4,882	6,731	5,050	-25.0
Raisins	307	328	350	+6.7
TOTAL	31,742	38,540	30,000	-22.2

*The different types were defined in SF 5014, the 1995 annual report.

** Estimate

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PRODUCTION

South Africa has got about 13,000 hectares under grapes for drying along the Orange River and another 2,000 hectare further South Along the Elephants River. About 70% of the sultana grape crop is usually dried but the fresh market is growing while the wineries also take some of the grapes when the weather is not suitable for drying.

Production Policy

Raisins are marketed through a pool system under the auspices of the Dried Fruit Board. Producer prices consist of advance, interim and final payments. The total is, however, heavily influenced by the quality of the crop. The following table contains recent payments and the expected FAS 1995 returns;

	FAS 93 (1994)		FAS 94 (1995)*		FAS 95 (1996)**	
	DRY	FRESH	DRY	FRESH	DRY	FRESH
	C/kg.	R/mt.	C/kg.	R/mt.	C/kg.	R/mt.
Thompsons seedless	251.45	629	253.95	635	279.35	698
Unbleached	230.45	576	225.60	564	248.16	620
Goldens	295.96	740	328.80	822	361.68	904
Raisins	259.41	649	262.90	657	276.05	690

*Preliminary

** Forecast.

Raisin yield from fresh fruit, 25%.

CONSUMPTION

The consumption figures in the PS&D includes losses incurred during the cleaning and grading in the pool system.

The actual FAS 94 (1995) PS&D follows:

Metric tons	Thompsons	Unbleached	Goldens	Raisins	TOTAL
Beginning stocks	6,046	583	1,001	102	7,732
Production	25,591	5,890	6,731	328	38,540
Local sales	5,142	1,525	1,474	290	8,431
Exports	11,925	3,089	4,781	0	19,795
Losses	1,884	427	369	2	2,682
Ending stocks	12,686	1,432	1,108	138	15,364

During 1994 domestic sales amounted to 8,284 tons which means that local sales increased by less than 2%. Sales have been constant over the past few years showing only very small growth.

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Dried Fruit

Raisins

STOCKS.

At the end of 1995 South Africa carried over 15,364 tons after only 7,732 tons were carried over at the end of 1994. The main reason for the increased carry over was the slow 1995 export sales but this situation is expected to turn around this year with the rate of sales already increasing.

TRADE

During 1994 South Africa exported 20,339 tons of raisins according to the Department of Customs and Excise whose figures are used in the trade matrix. The Dried Fruit Board claims 20,149 tons were exported during 1994 but the difference is small. Exports fell to 19,795 tons in 1995 in spite of the much bigger crop of higher quality. One of the reasons for the decline was the disappointing poor quality FAS 93 crop exported during 1994, coupled to strikes and shipping delays. Buyers realized late that the 1994 crop being exported during 1995 was of much better quality and sales were slow initially leading to the big carryover at the end of the year.

The 1996 sales are going much better and faster with the result that the 1996 exports could reach 25,000 tons.

In Europe, South Africa is compelled to sell all sultana cultivars at a minimum import price (MIP) which is profitable because of the low value of the Rand against the European currencies.

The value of the Rand against the Dollar plays an important role in the selling of the product. In the past favorable returns were realized at R3 to the Dollar compared to the current exchange rate of Dollar 1 = Rand 4.20. The devaluation of the Rand is helping export income realizations and producers are looking at a good payout this year, in spite of losing their GEIS (General Export Incentive

Scheme) benefits.

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 TRADE

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Trade Matrix

Raisins

Units: Metric ton

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	Exports for 1994 to:		Imports for 1994 from:
-U.S.	134		-U.S.
-Other			-Other
Germany	4,727		
U.K.	4,017		
France	2,226		
Japan	1,987		
Netherlands	1,599		
Switzerland	977		
Canada	795		
Singapore	795		
Hong Kong	616		
Norway	324		
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Total of Others	18,063		Total of Others
Others not listed	2,142		Others not listed
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Grand Total	20,339		Grand Total

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