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REDSUN RAISIN REPORT #5 -2023 August

SOUTH AFRICAN RAISIN CROP

HIGHLIGHTS OF THIS REPORT

Final Crop Size 2023

Sales of South African Raisins

Currants

Black and Thompson Super Jumbos

SEDEX /SMETA Report

The South African grape vines are now in a state of deep rest. Cold temperatures are a good sign at this early stage looking forward to a good raisin crop for 2024.



Final Crop Size 2023

The industry waited patiently for the last raisins of the 2023 crop to be delivered to processors. This must be a record that July 2023 saw the last few tons of raisins being delivered. For South Africa, it is not a common occurrence for farmers to hold raisin stock at their farm to be delivered later to processors.

In this case, these last deliveries gave us the following final crop figures for the SA crop 2023 at 60,204mt

Variety of Raisin	Volume mt 2023	% of total crop
Thompson medium	28078mt	47%
Golden medium	15727mt	26%
SA Sultanas	990mt	2%
OR Sultanas	733mt	1%
Flame select	4819mt	8%
Currants	3072mt	5%
Other (jumbos bolds)	6783mt	11%
2023 Total crop	60204mt	100%
Previous SA crops	Volume mt	
2022 crop	78757mt	
2021 crop	72732mt	
2020 crop	83435mt	

Source: Raisins SA weekly intake report

It is clear from the raisin crop history for South Africa, that the crop size has been underperforming over the past 3 years. According to the SA drying grape vine tree census produced in 2021, there were 16,036ha planted. Of this plantstock, 50% were in the ideal production years of 4 years to 15 years old. 16% were between 0-3 years old and the balance of 34% were vines over 15 years. With this plantstock, Raisins SA estimates that South Africa will be producing 100,000 mt of raisins in 2025.

The 2021 and 2022 crops were affected by rain at the time of drying along the Orange River. This region is responsible for 82% of the SA raisin production. After both wet years, the weather conditions of 2023 were perfect for raisin production. Hot with little to no rain. However, downy mildew, a mould that occurs naturally during a wet cycle, damaged the growing buds of the vines which affected the productivity of vines for the 2023 crop.

Therefore, the small crop of 2023, was not caused by rain, but by the consequences of rain during the previous two years. The vines themselves were very healthy as was seen by the impressive foliage cover that developed. The leaves are the “food factory” for the grapes. The ample nutrition supplied by the leaves to a relatively few grapes, resulted in excellent quality grapes. That produced good quality raisins.

Farmers received very high quality gradings at the time of delivering raisins to processors, which resulted in good prices per kg as an average. However, the high price received for the raisins did not compensate sufficiently for the limited quantity delivered. Farmers are having a tough time financially after three years of low volumes.

The experts are not convinced that the effect of the downy mildew mould will be cleared after a single year. Therefore, it may persist for a second year to a lesser extent. We hope they are wrong, and that South Africa can achieve its full potential for a crop of at least 85,000 of raisins in 2024.

Sales of South African Raisins

The following chart lists the six largest geographic destinations of the 2023 crop during the first 6 months of 2023. These figures are compared to the same period of 2022, and then the full year of 2022.

Total Number of countries	38 countries	43 countries	50 countries
crop year	6 months 2023	6 months 2022	12 months 2022
Germany	7099mt	7506mt	16507mt
USA	4948mt	3922mt	12117mt
South Africa	4057mt	4596mt	8840mt
Netherlands	3010mt	1999mt	4039mt
United Kingdom	1337mt	2010mt	3754mt
Canada	1672mt	2266mt	4226mt
Total SA raisin sales	29750mt	31517mt	64364mt

Source Raisins SA

It is interesting to note the following;

1. The importance of the German market to the South African raisin industry representing 25% of sales during 2022.
2. The number of countries around the world that receive the SA Raisins. 50 countries during 2022. There are 7 processors, each doing their own marketing independently of each other.
3. The SA domestic market is developing well buying 14% of the SA production in 2022. There are few traders that buy locally for export. The majority is for domestic consumption.

Currants

The sales of all varieties of dried grapes have been very active, with the exception of currants. The reason for the slow sales is uncertain. This is a unique product, with very small berries of 900-1300 berries per 100gr, full of flavour, ideal for confectionary, biscuits and baking. There is a plentiful supply of currants available and the price is at a record low level.

Redsun is heavily engaged in researching the market and making promotions to refresh the interest in this special product, which is relatively unique to South Africa because of the very small size berries.

Black and Thompson Super Jumbos

The term "super jumbo" was first used by Chile to describe the big berries of 60-90 berries per 100gr. This is to distinguish the "traditional" size jumbo of 80-120 berries per 100gr.

Redsun has experienced an overall increase in the quantity of jumbo raisins that are being made by table grape farmers. This is a long term trend that involves the construction of accredited drying facilities on their farms in order to allow the jumbo raisins to be bought by processors. The jumbos now represent 11% of the Redsun intake. We believe it will develop further to as much as 18% of our volume being 2700 mt of jumbos per year.

As a result of the trend in the table grapes towards naturally large size varieties, we estimate that two thirds of the jumbos made will be of the “super jumbo” category. This is a relatively new product to the market. It is an exciting innovation looking for new customers.

Redsun is promoting the super jumbo as an ideal “on the go” snack. The berries are big enough that a single berry can be enjoyed alone. Therefore, a busy commuter can have a bag of super jumbos to eat as a healthy snack. One at a time.

SEDEX /SMETA Report

During July 2023, Redsun was assessed by an external auditor according to the principles laid down by the 4 pillar SMETA standards. It was a comprehensive assessment as usual, and that report is now available on the SEDEX platform for our customers to understand how we manage Redsun. If there are any customers who are not members of SEDEX, we will be happy to supply you with a copy of the SMETA assessment report.

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