



Keimoes-Upington N14, 2km, Keimoes, Northern Cape, South Africa  
PO Box 767, Keimoes, 8860, South Africa  
Tel: +27 (0)54 337 8660  
Email: [info@redsun.co.za](mailto:info@redsun.co.za) [www.redsun.co.za](http://www.redsun.co.za)



## **REDSUN RAISIN REPORT #4 -2025 May**

### **SOUTH AFRICAN RAISIN CROP**

#### **HIGHLIGHTS OF THIS REPORT**

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#### **South African Raisin 2025 Crop is collected**

The original crop estimate for the 2025 South African raisin crop was 104,000mt. (Source Raisins SA). As the crop started coming in, the quality and volume was good. The choice grading averaged over 83% according to the deliveries received by Redsun.

This was excellent news for the farmers after receiving a record crop for 2024 at 96,445mt. South Africa has already achieved a new record raisin crop for 2025. According to figures for deliveries to processors at 23<sup>rd</sup> May 2025, the crop is 99,996 mt. Redsun is expecting more raisins to be delivered, as are other packers. So, 100,000 mt is a certainty.

The reason for the shorter crop than estimated is the rain during the later part of the harvest. It was not very serious. There was enough rain each day to hinder the drying process of the raisins. The farmers could not get their raisins dry to the level they could deliver to processors. Before the rain started, there was already the majority of the crop delivered to processors. Dry and beautiful condition.

The market gave farmers an additional bonus of a 28% increase in the price for Thompson mediums into the 2025 crop. The Thompson medium makes a little more than half of the South African raisin crop.

| <b>Product type</b> | <b>Actual delivery from 2025 crop at 23 May 2025.</b> | <b>% of total crop</b> | <b>Actual Delivery from 2024 crop</b> |
|---------------------|---|------------------------|---------------------------------------|
| Thompson medium     | 57,793 mt   | 58%                    | 51,753mt                              |
| Golden medium       | 13,334 mt   | 13%                    | 18,551mt                              |
| Flame medium        | 6,474 mt  | 6,5%                   | 6,718mt                               |
| Currants            | 3,964 mt  | 4%                     | 3,309mt                               |

|                   |           |      |          |
|-------------------|-----------|------|----------|
| SA Sultana medium | 10,212 mt | 10%  | 4,074mt  |
| OR Sultana medium | 3,144 mt  | 3%   | 2,395mt  |
| Jumbos            | 5,074 mt  | 5%   | 9,889mt  |
| Total             | 99,995 mt | 100% | 96,445mt |

Table representing SA raisin production 2025 and 2024

## Discussion of Raisin Varieties

Thompson mediums increased production over last year by 6,040 mt (12%). The demand is always great for Thompson mediums, against the background of falling Californian production. It is also a versatile raisin in terms of uses. We sell this product as low moisture, light coloured, regular moisture and midgets (Large and small)

Golden mediums volume shrunk compared to last year due to the less attractive price to the farmer compared to Thompson mediums. Farmers use the same grape to make a golden medium as they do a Thompson. The price for golden was USD 3400 compared to Thompson medium at USD 3150. The USD250 per mt difference in price did not justify the additional cost in making a golden. Therefore the farmer elected to make a Thompson. The additional cost involved in making a golden is USD 350 per mt. There are always quality risks with goldens, as we saw when the rain fell at the end of the season.

Goldens suffered substantial loss. The SO2 content absorbs moisture easily. Therefore, the drying potential is considerably slower. The colour is also affected. The higher % of choice grade will drop to include more standard grade. There remains further product in the stores on the farms, drying. That is over and above the figures recorded in this report.

OR Sultanas was a surprise. The farmers took up the challenge and made a good volume of OR sultanas. Clearly the higher price was attractive to farmers, who delivered 31% more OR sultanas of very nice quality compared to last year.

SA Sultanas (or WP sultanas) were very popular with farmers this year. The product is tender and full of body and flavour. The “full body” is a result of the high sugar content of the grape at the time of harvesting. However, care must be taken when processing the WP sultanas for retail packs. The skin is very tender after the lye process. South African farmers will have to make some adjustments to our processing of the grapes to make the WP sultanas. This is not a regular product from South Africa.

Flames remained unchanged. This product is a favourite for chocolate coating and trail mixes.

Currants delivered a record crop, however, it was still small volume compared to the very strong demand. Customers are trying to find an alternative source of currants to Greece. Currants are a problematic grape to grow. It is not part of the growing SA volumes moving forward.

## INC Council World Raisin Production Estimates

Having seen the actual 2025 crop from South Africa is (100,000mt), we can look at the world raisin/dried grape production estimate is for 2025. 85% of the world production is produced in the Northern Hemisphere. We will see the actuals playing out in the next three months.

| Country                       | Production forecast 2025 | Production 2024     |
|-------------------------------|--------------------------|---------------------|
| Türkiye                       | 220,000 mt               | 226,239 mt          |
| Iran                          | 215,000 mt               | 245,000 mt          |
| India                         | 180,00 mt                | 245,000 mt          |
| USA                           | 176,901 mt               | 174,000 mt          |
| China                         | 140,000 mt               | 130,000 mt          |
| South Africa                  | 96,400 mt                | 96,700 mt           |
| Chile                         | 63,000 mt                | 60,000 mt           |
| Uzbekistan                    | 60,000 mt                | 63,000 mt           |
| Other                         | 86,200 mt                | 92,375 mt           |
| <b>Total world production</b> | <b>1,240,501 mt</b>      | <b>1,332,314 mt</b> |

Source is INC Council statistics 2025 Congress 2025

According to these production estimates, the world will have 91,813mt fewer dried grapes produced during 2025 than in 2024. All eyes are on Türkiye. They are the key players in the market.

South Africa sees ourselves filling the shortages created by the reduction in the USA crop. Over and above the Thompson mediums, South Africa is happy to produce an excellent quality golden raisin.

### Shipments of SA Raisins from 2025 crop.

The shipments of raisins monitored from 1 January 2025. However, new crop only started moving from March. The following is the information of volumes and destinations as supplied by Raisins SA. Shipped between 1 January 2025 and 30 April 2025;

| Region                | 30 April 2025    | 30 April 2024    | Difference      |
|-----------------------|------------------|------------------|-----------------|
| Europe                | 7,693mt          | 7,446mt          | 247mt           |
| USA Canada            | 3,291 mt         | 6,112 mt         | -2,821 mt       |
| South Africa domestic | 3,071 mt         | 2,812 mt         | 259 mt          |
| United Kingdom        | 2,266 mt         | 1,710 mt         | 557 mt          |
| Middle East           | 783 mt           | 818 mt           | -25 mt          |
| Oceania               | 354 mt           | 265 mt           | 89 mt           |
| Africa other          | 56 mt            | 262 mt           | -206 mt         |
| Far East and Asia     | 138 mt           | 165 mt           | -27 mt          |
| <b>Total</b>          | <b>17,662 mt</b> | <b>19,589 mt</b> | <b>1,927 mt</b> |

Peter Kuilman

Website is [www.Redsun.co.za](http://www.Redsun.co.za)

[peter@redsun.co.za](mailto:peter@redsun.co.za)

+27 (0) 83 283 6744