

Global Raisins Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 2.9 bn
Forecast (2031)	USD 3.8 bn
CAGR (2021-2031)	4.3%
Study period	2021-2031
Largest region	Europe · 32.4%
Fastest-growing region	Asia-Pacific · 5.6%
Market concentration	Low
Licence	Individual / Company

The global raisins market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is advancing across bakery, breakfast cereals, portion-controlled snacks and naturally sweetened formulations, while export availability remains sensitive to weather in Türkiye, California, Iran and South Africa. Europe accounted for XX% of market value in 2025, supported by large industrial-bakery requirements and substantial import dependence. Asia-Pacific is the fastest-growing region at XX% annually as packaged-food production, modern retail and raisin consumption expand in China and India.

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Executive summary

The global raisins market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a CAGR of XX%. Demand is advancing across bakery, breakfast cereals, portion-controlled snacks and naturally sweetened formulations, while export availability remains sensitive to weather in Türkiye, California, Iran and South Africa. Europe accounted for XX% of market value in 2025, supported by large industrial-bakery requirements and substantial import dependence. Asia-Pacific is the fastest-growing region at XX% annually as packaged-food production, modern retail and raisin consumption expand in China and India.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global raisins market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- World dried-grape production totaled XXX metric tons in 2023/24 and was projected by the International Nut and Dried Fruit Council to recover to XXX metric tons in 2024/25.
- India produced XXX metric tons in 2023/24, equivalent to XX% of global dried-grape output, while Türkiye produced XXX metric tons.
- Europe represented XX% of global raisins market value in 2025 and remained the largest destination for internationally traded product.
- Natural seedless raisins generated XX% of 2025 market value, reflecting their broad availability and use in bakery, cereal and snacking applications.
- Bakery and confectionery accounted for XX% of market value, the largest application share, while direct snacking is forecast to grow at XX% annually.
- California handlers reported XXX tons of raisins handled from the 2024 crop, including XXX tons of natural seedless raisins.
- California finalized producer purchases from the 2024 crop averaged USD XXX per ton, while finalized golden-seedless purchases averaged USD XXX per ton.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Raisins Market Trends and Growth Drivers

Raisin-market economics are set at the intersection of perennial-crop supply and diversified food demand. Industrial users require consistent year-round specifications, but production remains concentrated in a limited number of irrigated regions where heat, rainfall, water availability and competing grape uses can materially alter each harvest.

Demand is broadening beyond traditional home baking. Manufacturers value raisins as a recognizable fruit ingredient that supplies sweetness, color, texture and moisture, while consumers recognize the product as portable and shelf stable. This dual role supports both high-volume ingredient contracts and higher-value snack formats.

Supplier competitiveness increasingly depends on specification management rather than commodity availability alone. Residue programs, sulfur control, traceability, optical sorting, organic segregation and reliable shipment execution determine access to premium customers and reduce the discount applied to inconsistent lots.

Growth drivers

Clean-label fruit sweetening

Food manufacturers are using raisins, raisin paste and diced raisins to add sweetness, texture and fruit content while shortening ingredient lists. The effect is strongest in bakery, cereal bars and breakfast products where raisins can replace part of the refined sugar while retaining moisture and shelf life.

Industrial bakery expansion

Packaged bread, buns, cakes and biscuits provide stable, high-volume demand with established raisin formulations. Capacity growth in India, Southeast Asia, the Middle East and Africa expands the addressable ingredient pool and favors processors able to provide calibrated moisture, size and microbiological specifications.

Portable whole-fruit snacking

Single-serve cartons and pouches position raisins as shelf-stable, naturally sweet snacks requiring no refrigeration. Flavored whole-fruit products and school-size packs are broadening the category beyond traditional household baking and improving value per kilogram.

Emerging-market retail penetration

Supermarket, convenience and online grocery expansion is placing branded and private-label dried fruit within reach of more urban households. Smaller pack sizes reduce the purchase barrier and support higher consumption frequency in China, India and Southeast Asia.

Shelf-stable ingredient economics

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Raisins deliver long ambient shelf life, concentrated flavor and year-round usability without frozen logistics. These characteristics improve inventory flexibility for bakers, foodservice distributors and emergency or institutional food programs.

Organic and verified low-residue supply

Retailers and premium manufacturers increasingly differentiate dried fruit through organic certification, origin traceability and residue-control programs. Scarcer compliant supply commands stronger pricing and gives certified processors preferred-vendor status.

Restraints

Climate-sensitive crop variability

Raisin supply is concentrated in irrigated districts exposed to heat, hail, untimely rain, mildew and water constraints. Crop losses tighten export availability, increase spot prices and force industrial users to reformulate pack sizes or source across origins.

Residue and sulfite compliance

Import controls covering pesticide residues, contaminants and sulfur dioxide can delay shipments or remove non-compliant lots from sale. Golden raisins face additional disclosure and process-control requirements because sulfur treatment is central to color retention.

Competing snack propositions

Fresh fruit, freeze-dried fruit, dates, cranberries and reduced-sugar snack products compete for the same shelf space and health-oriented consumer. Raisins must overcome concerns about concentrated natural sugars through portioning, whole-fruit positioning and product innovation.

Rising vineyard and processing costs

Irrigation, farm labor, drying infrastructure, energy, food-grade packaging and freight collectively pressure processor margins. Smaller growers and packers face the greatest difficulty financing mechanization, optical sorting and compliance systems.

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Driver and Restraint Impact on the Raisins Market Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label fruit sweetening	XXX	XXX	XXX
Industrial bakery expansion	XXX	XXX	XXX
Portable whole-fruit snacking	XXX	XXX	XXX
Emerging-market retail penetration	XXX	XXX	XXX
Shelf-stable ingredient economics	XXX	XXX	XXX
Organic and verified low-residue supply	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate-sensitive crop variability	XXX	XXX	XXX
Residue and sulfite compliance	XXX	XXX	XXX
Competing snack propositions	XXX	XXX	XXX
Rising vineyard and processing costs	XXX	XXX	XXX

Source: XXX

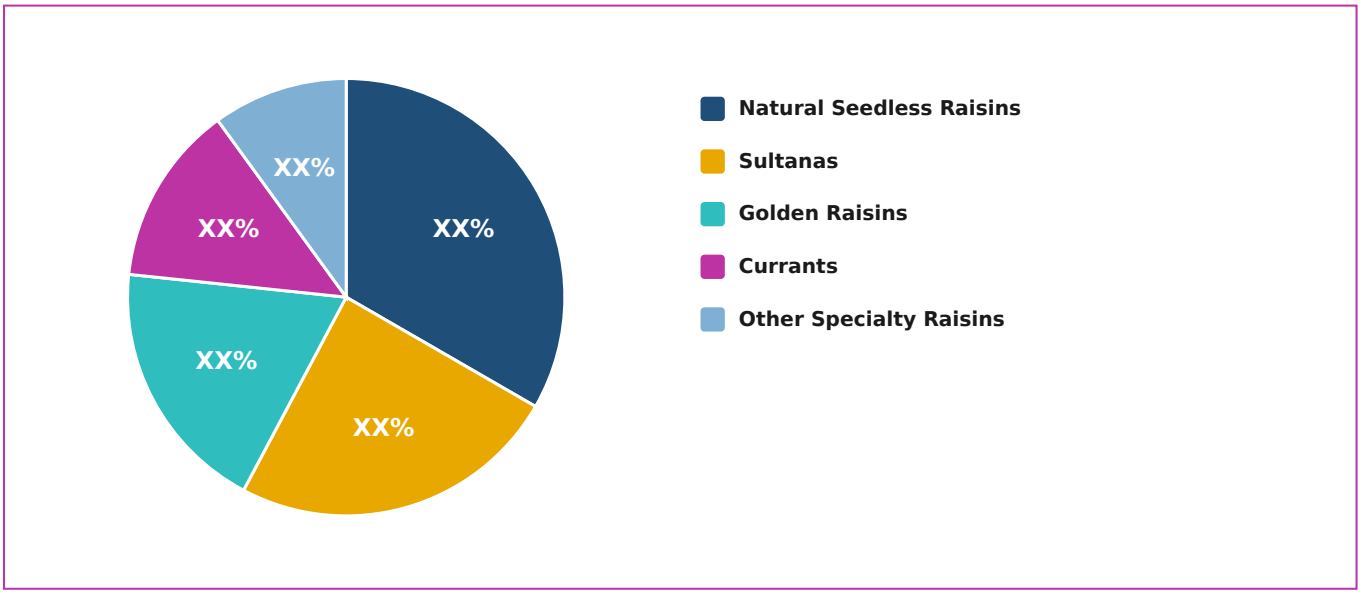
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Raisins Market Segmentation by Type, Nature, Application and Channel

By Product Type

Natural seedless raisins dominate because they provide the broadest size range, competitive pricing and compatibility with industrial bakery, cereal and retail-snack specifications. Sultanas retain a strong European and Commonwealth demand base. Golden raisins grow fastest as their color, softer texture and premium positioning support confectionery, foodservice and specialty retail applications.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Natural Seedless Raisins	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sultanas	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Golden Raisins	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Currants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Specialty Raisins	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional product retains scale advantages, wider origin availability and the pricing required by industrial bakery and mass retail. Organic raisins are advancing from a smaller base as European and North

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American retailers increase certified dried-fruit assortments. Limited certified acreage, segregation costs and compliance testing sustain a meaningful organic premium.

Value by nature, USD bn

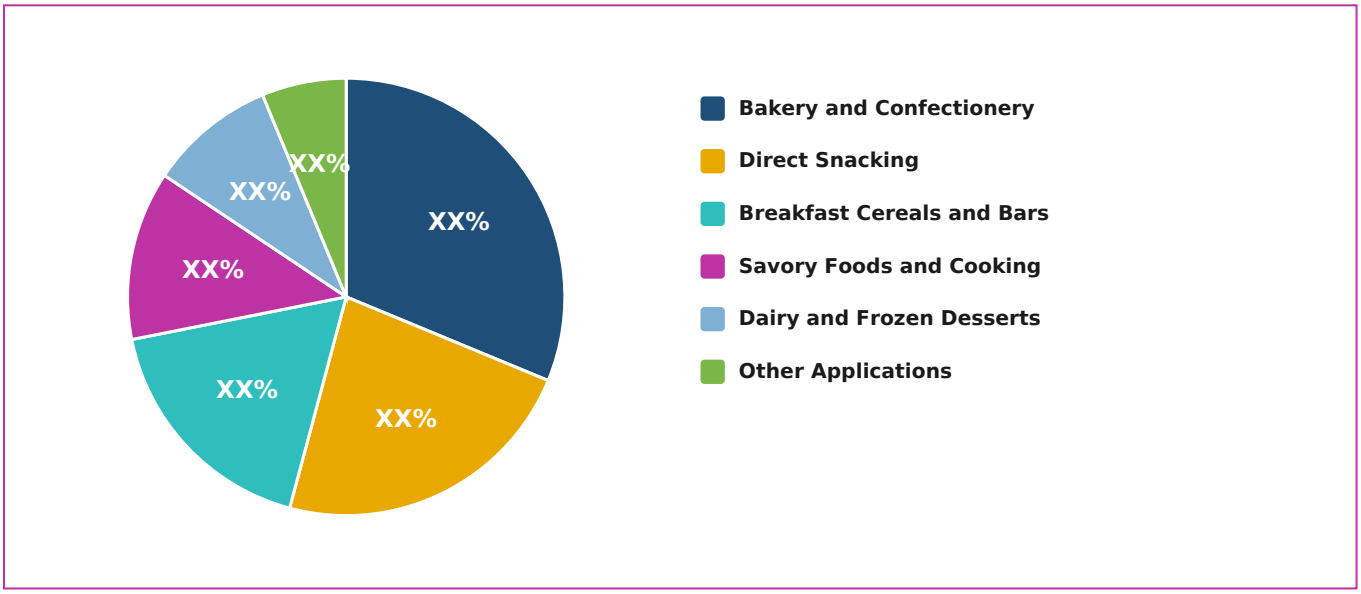
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery and confectionery lead because raisins add sweetness, moisture retention and visual inclusions across bread, cakes, cookies and seasonal products. Breakfast cereals and bars provide predictable industrial demand with strict size and flowability requirements. Direct snacking is shifting toward resealable and single-serve packs, flavored raisins and premium jumbo products.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bakery and Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct Snacking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Breakfast Cereals and Bars	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Savory Foods and Cooking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy and Frozen Desserts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct and distributor-mediated B2B contracts dominate because bakery, cereal and confectionery plants purchase calibrated grades in bulk. Supermarkets and hypermarkets lead consumer retail through private-label and branded pouches. E-commerce is expanding rapidly by improving access to organic, origin-specific and bulk formats that receive limited physical shelf space.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty Food Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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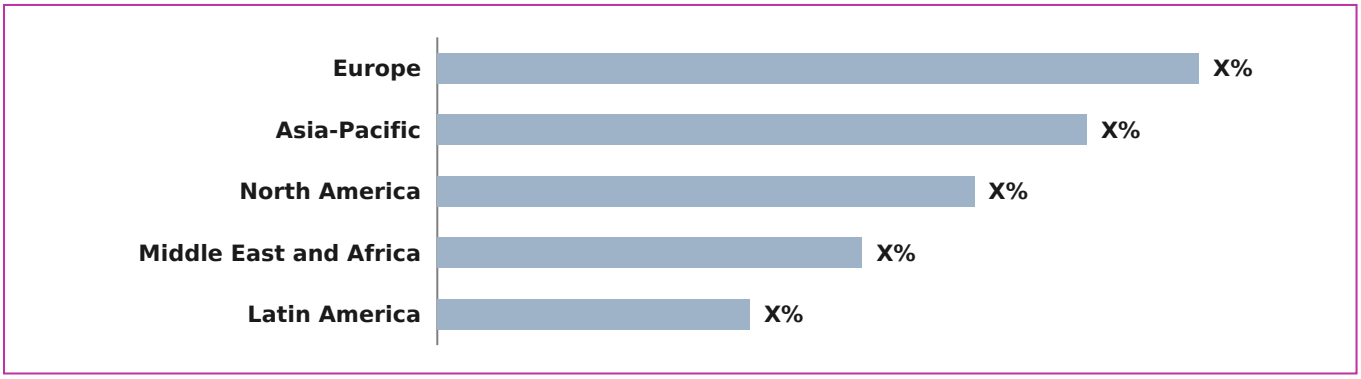
Raisins Market Regional Analysis and Country Outlook

Europe held XX% of global market value in 2025, combining mature household demand with the world's deepest import requirement for bakery, muesli, confectionery and private-label dried fruit. Germany, the United Kingdom, the Netherlands and France are central buying markets, while the Netherlands also functions as a redistribution hub. Türkiye remains the region's pivotal nearby supply origin, but European buyers increasingly balance Turkish contracts with South African, Iranian, Californian and Central Asian product to manage residue, color, size and crop risk.

Asia-Pacific represented XX% of market value and is forecast to expand at XX% annually through 2031. India combines major domestic production with rising bakery and snack consumption, while China supports substantial internal demand and a growing packaged-food manufacturing base. Japan and Australia remain higher-value markets characterized by demanding specifications, premium packaging and established use in bakery and breakfast products.

North America retains a vertically integrated Californian supply base and strong branded-snack demand, although reduced vineyard acreage and competing grape uses constrain domestic availability. South Africa is strengthening the Middle East and Africa supply position through export-oriented production and modern processing, while Argentina and Chile support Latin American and international ingredient trade. Brazil remains Latin America's largest demand center and relies heavily on imported raisins.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Raisins Market Competitive Landscape and Company Share

The raisins market is fragmented, with the ten largest suppliers accounting for XX% of 2025 revenue. Sun-Maid holds the strongest global consumer-brand position, while National Raisin Company, Lion Raisins and Traina Foods combine California sourcing with retail and industrial capabilities. Outside the United States, competition is organized around export packers and grower-linked processors in Türkiye, South Africa, Greece, Australia, Argentina and Chile.

Scale advantages arise from grower relationships, storage, optical sorting, steam treatment, sulfur management, product standardization and access to multiple pack formats. Industrial customers prioritize lot consistency and delivery reliability, whereas retail customers place greater weight on brand, private-label execution, resealable packaging and organic certification. No supplier has sufficient share to determine global pricing, which remains closely linked to origin-specific crops and export availability.

Investment is moving toward mechanized vineyard systems, traceability, low-residue protocols and flexible lines capable of producing whole, diced, coated and paste formats. Capacity additions in South Africa and the commercialization of Indian and Central Asian supply are gradually broadening the export base. Strategic advantage through 2031 will depend less on headline tonnage and more on the ability to deliver documented specifications across several origins.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Sun-Maid Growers of California	XXX	XXX	XXX	XXX
National Raisin Company	XXX	XXX	XXX	XXX
Lion Raisins	XXX	XXX	XXX	XXX
Traina Foods	XXX	XXX	XXX	XXX
Del Rey Packing Company	XXX	XXX	XXX	XXX
Boghosian Raisin Packing Company	XXX	XXX	XXX	XXX
RedSun Raisins	XXX	XXX	XXX	XXX
Carpe Diem Raisins	XXX	XXX	XXX	XXX
Geobres	XXX	XXX	XXX	XXX
Australian Premium Dried Fruits	XXX	XXX	XXX	XXX

Source: XXX

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Raisins Market Forecast and Commercial Opportunities

Global raisins market revenue will increase from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain measured, while premiumization, processing costs and a larger mix of organic, golden and snack-format products lift average realized value. Bakery will remain the largest application, but direct snacking and cereal-bar inclusions will contribute a disproportionate share of incremental revenue.

The central forecast assumes normalized global dried-grape production, continued expansion of packaged-food manufacturing and periodic crop-related price spikes rather than a sustained shortage. A favorable supply scenario built on improved South African, Indian and Central Asian availability would accelerate volume adoption, while consecutive weather losses in Türkiye or California would shift growth toward value rather than tonnage.

Winning suppliers will combine diversified grower procurement with residue management, reliable moisture and size specifications, and formats tailored to industrial automation. Consumer-facing growth will favor portion control, flavor innovation, transparent origin claims and packaging that limits clumping while preserving ambient shelf life.

Opportunities

- Low-residue and organic raisins for European premium retail
- Raisin paste and diced-raisin inclusions for clean-label bakery reformulation
- Single-serve flavored raisin snacks for children and active consumers
- New export capacity in South Africa, India and Central Asia
- Regenerative and water-efficient vineyard certification
- Premium origin, jumbo-size and specialty-color assortments

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