



Bösch Boden Spies

Dried in the Sunshine,
Australian Sultanas Straight
from the Vine

Whitepaper



General Overview

Sultanas are dried grapes typically derived from the **Thompson Seedless variety**. Although they are often grouped with raisins, their processing methods set them apart.

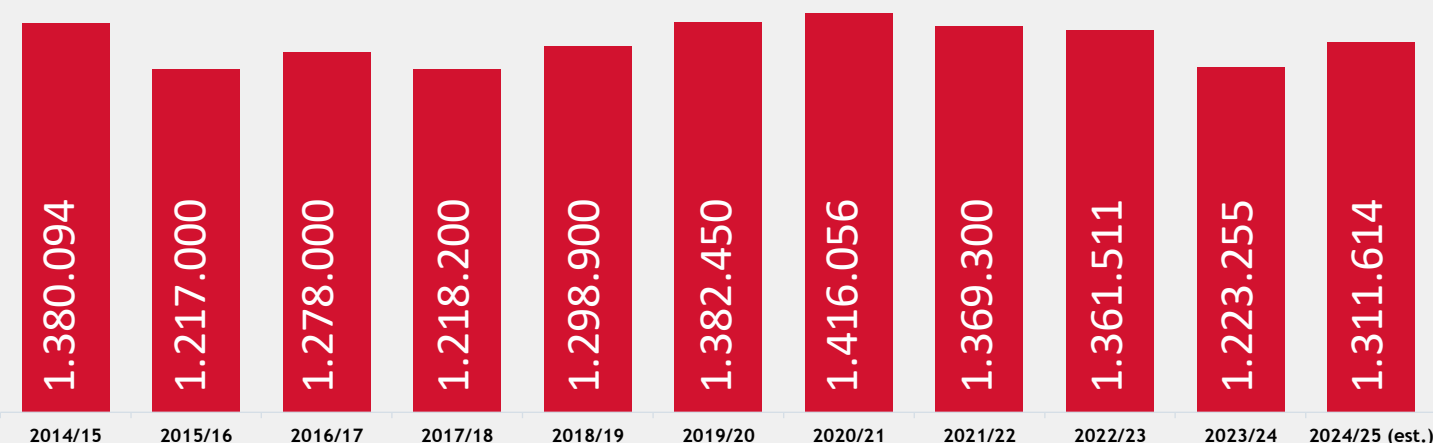
In **Australia**, sultanas are produced using a technique known as **Drying on the Vine (DOV)**. The bunches remain attached to the canes and are sprayed with a dilute emulsion of water, potassium carbonate, and vegetable oil. This removes the grape's natural wax coating, allowing **moisture to escape more easily**. The drying process takes approximately 10 to 14 days under natural sunlight. The result is a dried fruit with a **light golden color, mild sweetness, and a soft texture**. After drying, the pre-treatment is completely washed off during processing. **No sulphur dioxide** is used at any stage of Australian sultana production.

By contrast, traditional raisins undergo sun-drying **without any pre-treatment**. Grapes are laid on trays or racks in open air. **The longer drying time results in caramelization**, yielding a **darker color and richer, more intense flavor profile**.

Global Dried Grape Production

Over the past decade, global production of dried grapes—including raisins, sultanas, and currants—has experienced notable fluctuations. Production peaked at **1.42 million metric tons (MT)** in the **2020/21** season, followed by a decline to an estimated **1.22 million MT** in **2023/24**. A moderate recovery is projected for 2024/25, with production expected to reach approximately **1.31 million MT**.

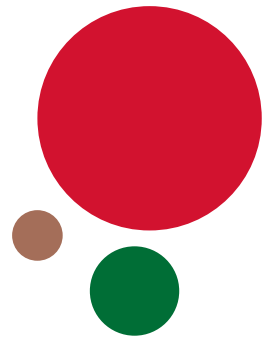
In the **2023/24** season, **India** emerged as the **largest producer**, delivering a bumper crop of **270,000 MT (22% of global supply)**. **Türkiye** followed with **206,346 MT (17%)**. However, since **over 90% of India's production is consumed domestically**, **Türkiye** remains the **leading exporter** in the global market. Over the last five years, **Türkiye** has consistently accounted for an average of **21% of total global production**, with an annual average volume of **278,469 MT**.



Europe was the largest import region in 2023, importing 410,232 MT — 50% of global exports. The **UK (10%)**, **Germany (8%)**, and the **Netherlands (7%)** were key European importers. **Asia** followed, accounting for 228,278 MT (28%), with **India**, **Türkiye**, and **Japan** leading regional imports.

THE DRIED VINE FRUIT PRODUCTION CYCLE IN AUSTRALIA

From vine to packaging, no human hands touch the fruit until it reaches the customer. This guarantees purity, safety, and premium taste.



Most dried vine fruit producers use the **trellis drying** method developed by CSIRO in the 1960s:

01 Fruiting canes are cut, separating the bunches from the vine

02 Bunches are sprayed with a food-grade drying emulsion of water, potassium carbonate and refined vegetable oil

03 Emulsion breaks down the berries' wax layer and potassium carbonate causes tiny splits in the skin; moisture escapes more easily while natural sugars are retained

Grapes are naturally dried to approximately 16% moisture, bunch stems become brittle, and a **mechanical harvester** moves through the vineyard:



dried fruit are shaken off the trellis onto catcher plates,



dry leaves and sticks are separated out,

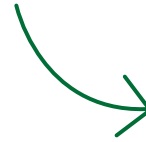


and the dried fruit are collected into large bins.

Fruit are finish-dried in dehydrators and delivered to the processor. The fruit never touches the soil at any point – ensuring cleanliness and minimizing contamination. Sulfur, additives or artificial coloring are not used at any stage.



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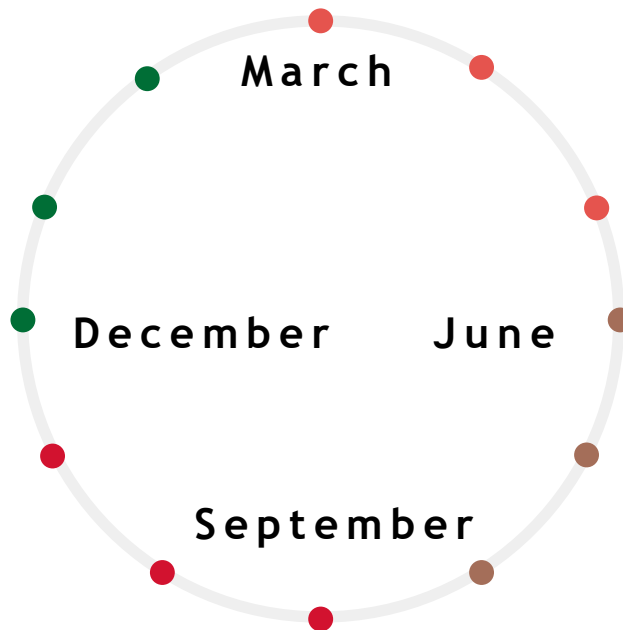
Late Summer to Early Autumn

- 🍇 Berries mature
- 🍇 Cane cutting begins
- 🍇 Berries dry and are harvested



Autumn (Postharvest)

- 🍇 Harvest completed, and season effectively ends
- 🍇 Leaves drop, and vines enter dormancy to prepare for the next growing cycle



Winter

- 🍇 Old canes are removed from the trellis
- 🍇 Vines are pruned
- 🍇 New canes are selected to carry next season's crop



Early Summer

- 🍇 Berries continue to grow
- 🍇 Berry sugar levels increase steadily



Spring

- 🍇 New shoots appear and begin to grow
- 🍇 Clusters develop, flowers blossom and turn into small, hard green berries



The 2025 Australian dried vine fruit crop progressed well, supported by favorable early-season conditions and strong canopy growth. An ideal spring bud burst set the stage for a healthy crop, with good shoot, leaf, and cluster development across all growing regions. Frost had minimal impact on the vines, and there was ample water for irrigation thanks to good rainfall in storage catchments.

Although December brought short bursts of heavy rain and extreme heat (with temperatures reaching up to 46°C), overall rainfall remained below average, and crop development stayed on track. Fruit maturity advanced ahead of schedule, with early varieties cut in mid-January. Other varieties were cut in February and early March.

Early varieties were harvested in late January, while the harvest peaked in March under warm, dry conditions ideal for natural drying, which progressed well. Most dried fruit were harvested by the end of March. Low disease pressure and ideal drying conditions supported the production of clean, high-quality fruit.

CR OP

Australian sultana production returned to normal levels after the 2023 downy mildew outbreak. Berry size and quality are high. Sunmuscat maintained its reputation for consistency, and accounted for approximately 60% of total intake. Currant deliveries reached record volumes, with good fruit size and color.

New plantings from 2021–2023 are contributing to rising national volumes. Plantings of early-ripening varieties such as Sugra39 and Selma Pete continue to expand, while the newly introduced Murray Bold shows strong promise as a Thompson Seedless replacement.

Global demand remains strong, bolstered by firm sultana prices and favorable market positioning. The sector's outlook is positive, driven by a resilient crop, an expanding varietal mix, and stable international demand.

By May, APDF achieved a milestone: 10,000 MT of raw, unprocessed dried vine fruit were delivered for processing. The company enhanced quality control, including the installation of the TOMRA 5C laser sorter, ensuring the cleanest, highest-grade dried vine fruits to date.



20
25

QUALITIES



SUNMUSCAT

- ✦ Subtle muscat flavor
- ✦ Large golden berries
- ✦ Ideal snacking and cooking product
- ✦ Unique to Australia



SULTANA

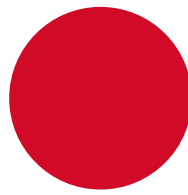
- ✦ Sweet taste
- ✦ Unique golden color
- ✦ Soft texture
- ✦ Perfect for snacking and baking



CURRENT

- ✦ Sweet and tangy
- ✦ Small black berries
- ✦ Ideal for snacking and cooking
- ✦ Australia has its own unique currant variety “Carina”, developed to produce consistent high yields, guaranteeing supply every year.

Per 100 g	Sunmuscat	Sultana	Currant
Energy	1,173 kJ (281 kcal)	1,143 kJ (273 kcal)	1,211 kJ (289 kcal)
Protein (g)	2.2	2.4	3.6
Total fat (g)	<0.1	0.1	0.2
Sat. fat (g)	<0.1	<0.1	0.1
Total carbohydrate (g)	67.3	74.4	67.7
Sugars (g)	66.8	74.4	67.2
Dietary fiber (g)	<0.5	1.7	<0.5
Sodium (mg)	10	3.9	11



ABOUT US

We are a passionate B2B supplier, service provider, and innovator – shaping the future of the food industry since 1913. With premium ingredients, market expertise, and customized solutions, we support our partners in creating better food products.

Our portfolio includes:

- > Dried fruit and nuts (e.g., cranberries, wild blueberries, almonds)
- > Fruit purées and concentrates (e.g., acerola, passion fruit, prunes)
- > Frozen and canned fruit (e.g., wild blueberries, acerola)
- > Functional ingredients (e.g., hydrocolloids, botanical extracts)



Andreas Schroda

Senior Key Account Manager

andreas.schroda@boeschbodenspies.com



Kristin Thees

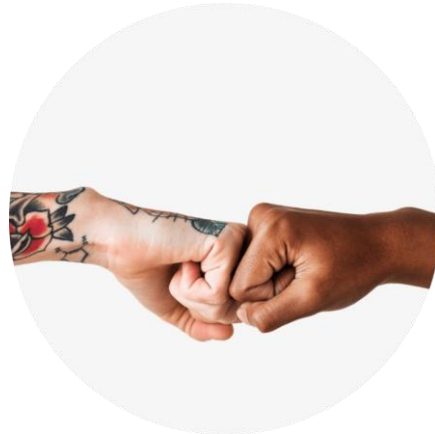
Manager Marketing & Business Development

kristin.thees@boeschbodenspies.com



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Bösch Boden Spies GmbH & Co. KG
Heidenkampsweg 74-76
20097 Hamburg

+49 40 33 30 16 0
office@boeschbodenspies.com
www.boeschbodenspies.com