Dried Tree Fruit
HORTGRO Growing Fruit IQ

INDUSTRY NEWS

JUNE 2026

GLOBAL PRUNE INDUSTRY FACES DEMAND CHALLENGE AMID RISING SUPPLY

The International Prune Association Congress 2026, hosted in Modena, Italy, was attended by Charl Herbst (Hortgro Stone Chairman) and Jacques Jordaan (DTF Manager) in May 2026.

Presentations and industry discussions highlighted that the global prune industry is entering a period of structural transition. While production continues to expand, demand growth is not keeping pace.

China is emerging as the primary driver of growth, particularly in the fresh fruit segment, while most other markets remain mature with relatively stable consumption patterns. As a result, the industry's key challenge is shifting from increasing production to stimulating demand.

Key observations from the congress included:

- Global prune supply continues to increase.
- Demand growth remains limited outside China.
- Consumption in most markets remains largely stable at approximately 205,000 tonnes.
- Growing supply and stagnant demand are placing downward pressure on prices.
- Competition among producing countries is intensifying.

The overall message was clear: future industry growth will depend less on production expansion and more on successfully creating new demand and increasing consumer consumption.

SUMMARY PER COUNTRY:

CHILE

Overview

- Production approximately 117,000 tonnes dried.
- Planted area expanded from 5,000 ha in 1999 to approximately 14,000 ha 2026.
- Fresh sales are estimated at 15–18% of dried volume equivalent, confirming Chile also has a meaningful fresh channel alongside its dried export base. Using the dried volume conversion factor of 3.33, this implies fresh volume of approximately 11 million standard 5.5 kg cartonnes.
- Chile remains the leading global exporter.

Yields & Production Efficiency

- High-efficiency commercial scale.
- Among the top global productivity benchmarks.

Prices

- Increasing pressure from low-cost supply competition.
- Focus on maintaining quality premium positioning.

Insight

- Strong competitor on: Scale, efficiency, and export market access.

CHINA

Overview

- Fresh prune demand reached approximately 650,000 tonnes in 2026, making China the largest fresh prune market globally.
- Planted area expanded to approximately 60,000 ha, and domestic production now supplies about 85% of consumption, sharply reducing import dependence.
- This growth phase began around 2015, when consumer awareness increased sharply, and accelerated further after 2020, supported by e-commerce and health-focused consumption trends.

Yields & Production Efficiency

- Traditional varieties yield about 1.2-1.75 t/ha (dried equivalent), while newer plantings can reach 2.5-3.0 t/ha, showing strong productivity upside.
- Local breeding and orchard modernisation aim to improve uniformity, extend the harvest season from July to September, and reduce price volatility.

Price Structure

- Domestic fresh prices are typically ¥20–30/kg, while imported fresh fruit trades at roughly double that level, limiting imports to premium or early-season niches.
- In dried prunes, imported product is priced at ¥100–120/kg versus ¥40–80/kg for domestic supply, giving local producers a strong mass-market advantage.

Fresh vs Dried Market Dynamics

- The fresh market remains the primary growth engine, driven by broad consumer appeal, lower prices, and strong digital sales through platforms such as Douyin.
- The dried market is smaller at around 80,000 tonnes, still import-dependent, and concentrated in snacking, baking, and health-related uses, leaving room for premium imported fruit.
- Processing potential is growing in juices, purées, and health-oriented products, supported by strong digestive-health positioning and broader health-snacking trends.
- Key risks include oversupply and softer prices as production expands, which will increase the importance of quality, brand, size, uniformity, and processing suitability.

USA (CALIFORNIA)

Yields & Production Efficiency

- Production 64,000 tonnes.
- Strong productivity supported by technology and research-driven farming

Prices

- Not explicitly quantified, but they have a high cost base and compete through value, branding, and health positioning

Insight

- California's industry model is driven by maximising value per ton rather than focusing on low-cost production.

ARGENTINA

Overview

- 28,000 tonnes exports
- Not more than 50% of orchards are in good condition, highlighting the need for orchard renewal and better productivity management.
- Grape hectares are decreasing, which could open up land for future prune expansion.

Yields & Production Efficiency

- Variation due to small-scale farms and older orchards
- Large new farms expected to improve tonnes/ha significantly

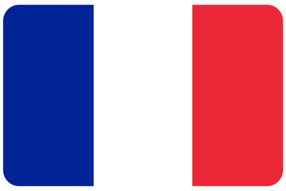
Prices

- Economic challenges affecting profitability and investment capacity

Insight

- Moving toward there will be fewer farms with higher yield and lower cost structure

FRANCE



Overview
- 27,000 tonnes production and 10,700 ha planted area.
- The recent trend has been toward organic production, although organic hectares are now decreasing slightly.
- France is the largest per-capita consumer, at approximately 400 g per person.

Yields & Production Efficiency
- Stable, mature orchard base
- Focus on quality rather than high-yield

Prices
- Higher retail prices vs global average (implied through branding)

ITALY

Overview
- 9,885 tonnes consumption with 2,000 tonnes production

Prices
- Retail prices are stable vs previous year
- Pressure from low-cost imports

Insight
- Market driven by imported price competition and growth of discount retailers

AUSTRALIA

Overview
- 2,800 tonnes production

Yields & Production Efficiency
- Average: ~5 t/ha (Top producers: ~7 t/ha)

Insight
- Small industry, but productivity variation suggests room for improvement

SOUTH AFRICA

Overview
- 560 tonnes (2025) production
- Area down 15% over 5 years, expected to stabilise
- Aging orchards + declining area suggest productivity constraints

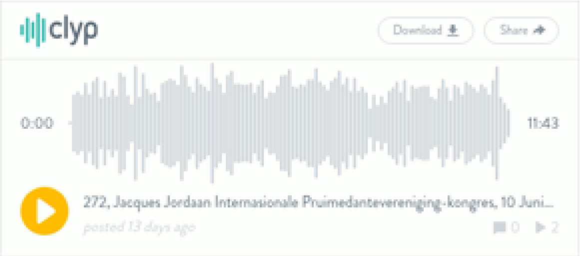
Prices
- Strong exposure to: Exchange rate volatility and import price competition (pitted product)

Market structure
- Only one pitting facility locally → reliance on imports (326 tonnes in 2025)

Opportunities
- Strong potential in: China market access - Fresh exports

Insight
- Growth future depends on: Export development and improved value chain capability

IN THE NEWS



Jacques Jordaan had the opportunity to talk to Lise Roberts from RSG Landbou, giving feedback on the IPA congress. Have a listen here.

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