

Global Market Study Of Dried Fruits

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Submitted: 15-07-2021

Revised: 29-07-2021

Accepted: 31-07-2021

ABSTRACT

The global dried fruits market is stated to be valued at 6,999 (USD Million) by 2025 at a CAGR of 5.6% during the forecast timeline.

The main objective of this global study is to learn about the overall trend of dried fruits. This study provides an overall idea of the dried fruits along with global trends of production, consumption, import, export, regional analysis, and a review of a global company. The study provides information about the trends via country analysis, region analysis, per capita.

The study provides a segmentation of dried fruits. It also provides a market overview of the dried fruits and its potential to flourish over the years. The trend of the dried fruit industry has expanded previously and continues to the same extent, the forecast of the industry helps to understand the revenue that will be yielded from the dried fruits in the coming years.

The study will let you know the standings of the various countries globally concerning production, consumption, import, or export and how these standings have changed and what margins over the year. The report offers historical data from 2017 to 2019 along with a forecast from 2020 to 2025 based on value (USD Million). Also, there is a case study on European markets which tells the production and consumption scenario of Europe.

I. INTRODUCTION

Dry fruits are basically fruiting from which the moisture content is extracted either naturally by sun drying, or with the use of dryers and dehydrators. Dry fruits are mostly known for its shelf life and nutritive value. Dry fruits are mostly much sweeter than the original fruit as the natural sugar present is more concentrated. Dry fruits are consumed all over the world. Tablets dating to about 1700 B.C., in Mesopotamian have found the earliest recorded mention of dried fruits. Some of the traditional dry fruits consumed are dates, raisins, figs, apricot, prunes. Traditional dry fruits have been a staple of Mediterranean diets or of the Mesopotamian cuisine from the very

beginning. Countries or parts of countries like Turkey, Iran, Iraq, Syria, Egypt, etc. come under Mesopotamian region.

The amount of dried fruit produced world wide is about 3.2 million metric tons, out of which 16% is produced by USA followed by Turkey which contributes to about 15% of the total produce. The most popular dried fruit consumed are raisins and the dry fruit with largest supply value are dates. Dates, date juice evaporated as sweeteners into syrup and raisins were used by these early civilizations.

In their breads, they included dried fruits for which they had more than 300 recipes, from plain barley bread for the staff to very elaborate, spiced cakes for the palaces and temples with honey. Since cuneiform was very complicated and could only be read by scribes who had learned it for years, it is doubtful that the tablets were intended for daily cooks or chefs. They were written instead to record the culinary art of the times.

One of the first cultivated trees was the date palm. It was domesticated more than 500 million years ago in Mesopotamia. It grew abundantly in the Fertile Crescent and was so productive that dates were the cheapest of the staple foods (an average date palm produces 50 kg (100 lbs.) of fruit a year for 6 decades or more). Because they were so valuable, the monuments and temples of Assyria and Babylon were well recorded. In Mesopotamia, the villagers dried them and ate them as sweets. They helped to add character to the meat dishes and grain pies, whether fresh, soft-dried or hard-dried. For their capacity, they were respected by travelers and were recommended as stimulants against fatigue.

Figs were also prized in early Mesopotamia, Palestine and Egypt, where their daily usage was probably greater than or equivalent to that of dates. As well as featuring in wall drawings, as funerary offerings, several specimens have been found in Egyptian tombs. Figs grew quite easily in Greece and Crete and were the staple of both the poor and the wealthy, particularly in their dried form.

In the 4th century BC, grape cultivation first began in Armenia and the eastern regions of the Mediterranean. It was here that raisins were produced by burying grapes in the desert sun. Viticulture and raisin production spread over northern Africa, including Morocco and Tunisia, very quickly. The Phoenicians and the Egyptians, probably because of the perfect sun-drying environment, popularized the production of raisins. They put them in storage jars and allotted them by the thousands to the various temples. They also incorporated them, some made with honey, some with milk and eggs, into their breads and their different pastries.

In Asia, plums, apricots and peaches originated. In the 3rd millennium BC, they were domesticated in China and spread to the Fertile Crescent, where they were also very popular, fresh and dried. They arrived much later in Greece and Italy and were very expensive, but appreciated when preparing gourmet dishes with port or stewed with honey and spices. In the same way, dried fruits such as pistachio, cashew and almonds also originated in Brazil in the year 1500. They were

first considered as inedible because of their hard shells, but after the human knowledge of the sorting process, they again begin to treat it in their times.

II. MARKET OVERVIEW

2.1 GLOBAL MARKET ANALYSIS.

The market size for dried fruit is currently valued at USD 7.4 million in 2020 and last year the market size was valued approximately at USD 5 million. In the forecast period, the dried fruit market is expected to grow at a CAGR of 7.1 percent to reach a valuation of USD 12.7 million in 2026. The production of dried fruit amounted to about 3.2 million metric tons worldwide in 2019/2020, up from three million metric tons in the previous year. The per capita consumption of dried fruit in the U.S. in 2019/20 amounted to about 1.06 pounds. In contrast, in the same year, Americans consumed 116.75 pounds of fresh fruit per capita. The United States accounted for about 17 percent of the world's dried fruit production in the 2019/2020 marketing year.

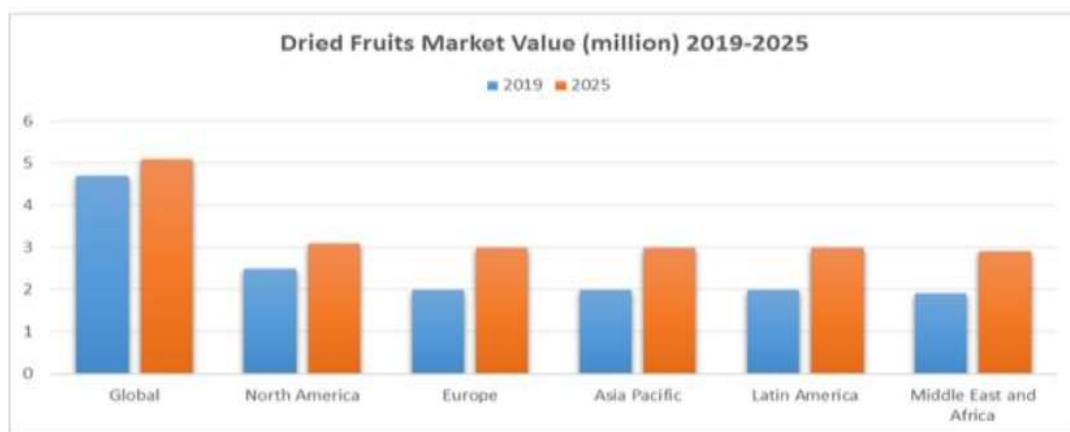


Fig 1. Dried fruit market value

Source: Market Data Forecast

2.2 Regional Growth Demand Analysis

The leading regions is Asia-pacific followed by North America and Europe. Due to the festivals and gifting culture in India, India dominates the dry fruit market in the Asia-Pacific region. The booming retail market in North America adds fuel to growth due to the widespread acceptance of packaged foods containing nutritious ingredients. The expansion of the Asia-Pacific market during the projected timeline is attributable to the large-scale use of dried fruit in confectionaries or bakery products in Asia-Pacific countries. Apart from that, people eat dried fruits by combining them with cereals, cheese and

yoghurt. In addition, the regional market is expected to gain momentum over the coming years due to the health benefits derived from the consumption of dry fruit by consumers due to its high phytochemical content.

III. SEGMENTATION OF DRIED FRUITS

3.1 BASED ON TYPE OF FRUIT

1. DRIED FRUITS

- Dates
 Dates can be described as the sweet-tasting brown, oblong-shaped fruit of a palm tree,

often consumed in a dried state. In several parts of the world, date palm is the most important crop, typically marked by an arid and high-temperature climate. The production, consumption, import and export of the respective countries are evaluated for the global date market. In 2018, the global date market revenue amounted to \$13.8B, increasing by 9.7 percent over the previous year. From 2007 to 2018, the market value grew at an average annual rate of 9.7 percent. Egypt (1.6 million tons), Algeria (1.1 million tons) and Iran (1 million tons) were the countries with the largest amounts of date consumption in 2018

.These countries were followed by Saudi Arabia, Sudan, India, the United Arab Emirates, Pakistan, Iraq, Oman and Morocco, which together accounted for an additional 39 percent. Egypt (\$2.3B), Algeria (\$2.1B) and Iran (\$1.1B) were the countries with the highest market value levels in 2018, accounting for 40 percent of the global market in value terms. Iraq, Saudi Arabia, Sudan, Oman, Morocco, Pakistan, the United Arab Emirates and India, which together accounted for a further 38 percent, preceded these nations.



Fig 2. Dates
 Source: Wikipedia

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Fig 3. Global Date Market

Source: Mordor intelligence

- Figs

Figs (*Ficus carica*) also known as common fig, is an Asian species of flowering plants in the mulberry family. Global per capita intake of dried figs increased modestly from 0.017 kg per year in 2016 to 0.019 per year by 2019. While relatively higher per capita consumption has been observed in

high-income economies, global dried fig consumption peaked at 146,469 metric tons in 2019. The United States, Iran, Germany, France, India and the United Kingdom were the largest dried fig consumers in the same period, accounting for almost 12.3 per cent, 12.2 per cent, 9.8 per cent, 9.6 per cent, 9.4 per cent and 5.4 per cent

respectively. According to the National Agricultural Statistics Service, the United States is a mere importer and exporter of figs. For example,

during 2017-18, the country produced 31,200 metric tons of figs, of which 27,300 metric tons were intended for the processed industry.



Fig 4. Dried Figs
 Source: Wikipedia



Fig 5. Global Date Market

Source: Mordor intelligence

- Apricots

Dry apricots are dried apricot fruits, which are dried using advanced driers and further dehydrated. Dry apricots are exchanged globally in large quantities. Turkey is the main manufacturer and exporter of apricots. The country produced 985,000 metric tons of apricots in 2017 and exported 94,999 metric tons of dried apricots worth USD 266.9 million in 2017. The global market size of dried apricots was estimated at USD 703.9

million in 2018 and is expected to register a CAGR of 4.9 per cent during the forecast period. The growing importance of apricots as nut snacks due to their nutritional composition with elements such as fiber, vitamins, minerals and essential phytochemicals is expected to drive the growth of the market. Increasing health awareness and availability of convenient snacking options containing dried apricot are expected to further drive the market.



Fig 6. Dried Figs

Source: Wikipedia

- raisins

Dried grapes are called as raisins. Grapes are dried either in the sun or in driers, turning them into golden, green or black colors. Raisins are also commonly used in desserts such as in bread puddings, cookies and shortcakes. Approximately

1,34 million metric tons of dried grapes were produced worldwide in the marketing year 2019/2020. In the 2015/2016 crop year, domestic raisin consumption in the United States was 235,136 metric tons.



Fig 7. Raisins

Source: Wikipedia

2. TREE NUTS

- Almonds

Almonds are nuts rich in vitamins, carbohydrates, proteins, and minerals. They are primarily grown in regions of North Africa, the Middle East and India Subcontinent. The global demand for Almond is projected at USD 6773 million in 2020 and is expected to hit USD 9438.4 million by the end of 2026, rising at a CAGR of 4.8 per cent between 2021 and 2026. Countries like USA, Australia, Spain, China, Italy, Turkey, Morocco, etc. were the world's leading producers in

2016/2017 and the most important exporter are USA and Australia. Approximately 80 per cent of the Almonds are grown by the USA all over the world. North America is ranked the world's largest producer of almonds, accounting for around 68 per cent of the total annual almonds produced. The European market produces the largest sales for the global market for almonds, with demand from the confectionery business rising exponentially annually. The Asia-Pacific market is expected to grow at a significant pace during the forecast period due to the increasing number of consumers.



Fig 8. Almonds
Source: Wikipedia

- Walnuts

Walnuts are single-seeded, round stone fruits produced from the walnut tree. Walnuts consist of two halves within a hard shell enclosed in green fruit and a huge, wrinkled, edible seed of a deciduous tree. Walnuts have a nice flavor and can quickly be added to the salad, Vegetables dishes and desserts. Walnuts contain anti-inflammatory nutrients, including omega-3 fatty acids, various

tannins, phenolic acids and a wide range of flavonoids. The Asia-Pacific region contributes almost 36% of global walnut consumption. The volume of walnuts consumed in the regions amounted to 2.73 billion in 2018. Walnut consumption in the region is dominated by Chinese consumption. China's per capita consumption of walnuts is also rising annually and has shown a 10.5-fold rise in the last 21 years.



Fig 9. Walnuts
Source: Wikipedia

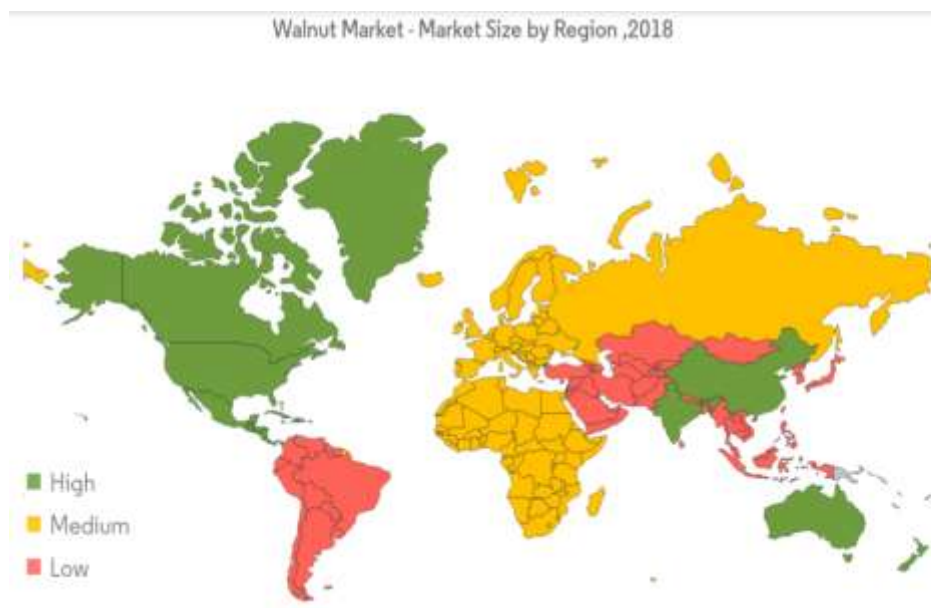


Fig 10. Global Date Market

Source: Mordor intelligence

3.2 BASED ON APPLICATION

1. SPICE INDUSTRY

Generally, the snack industry has limited processing of Dry fruits and nuts, such as roasting or coating. The specific segment is dominated by branded goods sold via retail stores, while alternative distribution channels, such as e-commerce sites, continue to rise in popularity. These goods are also used as raw materials for energy and snack bars (in some cases referred to as 'breakfast bars').

2. CONFECTIONERY INDUSTRY

The confectionary sector particularly the chocolate industry, is one of the largest industrial users of nuts as a raw material (especially pistachio and almonds). Dry fruits are also becoming increasingly popular in a wide variety of items, such as premium dark chocolate-coated apricots and peach chunks. A significant development is the gradual move to high-tech drying and processing technologies with the goal of enhancing food safety and quality control. As both nuts and dried fruits are considered to be safe, the confectionary industry promotes their use in goods that cater to health-conscious customers.

3. BREAKFAST CEREAL INDUSTRY

The breakfast cereal industry also uses dried fruit and nuts as ingredients for the processing of biscuits, cereals and muesli. Raisins are used whole, while other forms of dried fruits and nuts may be thinly sliced (in the case of almonds) or Cubed (for peaches and apricots).

4. BAKING INDUSTRY

In general, bakeries procure their ingredients from specialist bakeries. European companies, some larger companies, directly procure their products from importers. The nuts for this section are raisins, almonds and walnuts.

IV. GLOBAL PRODUCTION

4.1 GLOBAL DRIED FRUIT PRODUCTION - 2018

Overall, dried fruit production increased by more than 2.8 million metric tonnes in 2017/2018, up by 16 per cent from the previous 10-year average. Dry grapes accounted for 42% of the world's share of dried fruit, led by table dates of 36%. The remaining 22 per cent were prunes, dried apricots and dried figs. The largest increase in production over the last decade was observed for table dates and dried apricots, which rose by 40% from the previous 10-year average. In 2017/18, Turkey led world production of dried fruit (19 per cent of the world share) as the top dried grape, dried apricot and dried fig producing country. It was followed by the USA (12 per cent), the world's first producer of prunes and the second and third world producers of dried grapes and dried figs.

Iran and Saudi Arabia, the second and third respectively were the largest dry fruit producing countries in the world in 2017/18, were in turn, the second and first leading table date producers. Chile, which increased its production of dried fruit by 23 percent over the previous 10-year

average, stood out for its production of prunes and dried grapes.

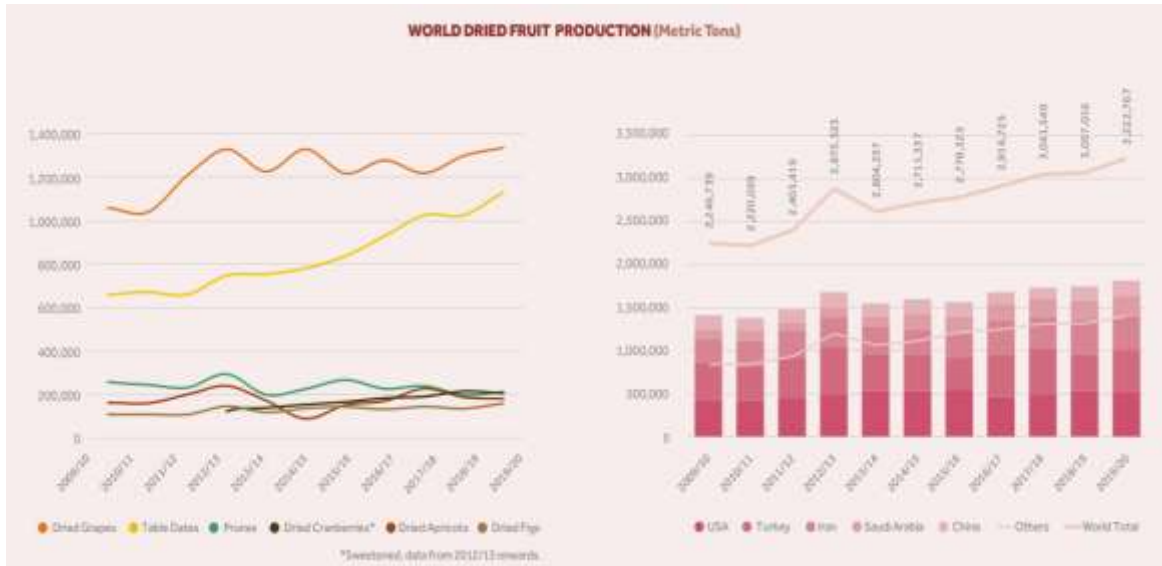


4.2 GLOBAL DRIED FRUIT PRODUCTION – 2019

Estimates over the last decade show a positive trend in the production of dried fruit, which increased by 976,000 metric tons between 2009/10 and 2019/20 to 3.2 million metric tons. Dry grapes (Raisins, Sultanas and Currants) remained the most developed dried fruit number, reaching more than 1.3 million metric tons. This constitutes 41% of the world's share in 2019/20. Table dates accounted for the following 35 per cent with more than 1.1 million MT of production and also demonstrated the most important growth pattern over the last 10 years; on average, production rose by 48,355 MT/year from 2009/10 to 2019/20. The remaining 23 per cent were distributed among prunes (7 per cent),

sweetened dried cranberries (6 per cent), dried beans (6 per cent) and figs (5 per cent).

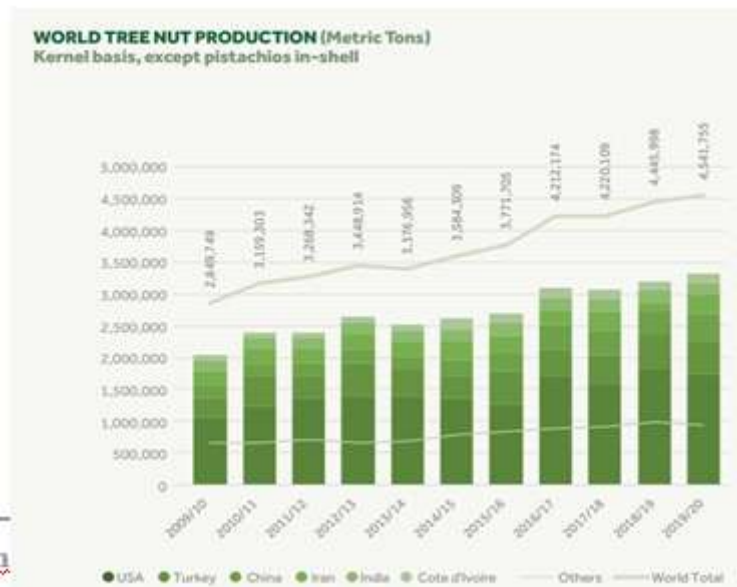
At the regional level, the USA, Turkey and Iran have led the world's production of dried fruit over the last 10 years, with shares of 16%, 15% and 12% respectively in 2019/20. This accounted for 7 percent and 6 percent respectively. The USA was the world's largest producer of prunes and sweetened dried cranberries, and the second largest producer of dried grapes. Turkey remained the world's leading supplier of Sultana raisins, dried apricots and figs. Iran was the second world producer of table dates and dried figs, and the third world producer of dried figs and the fourth source of dried apricots and grapes. Saudi Arabia was the first producer of table dates and China to grow dried grapes (third in the 2019/20 world ranking).



4.3 GLOBAL TREE NUTS PRODUCTION – 2019

Over the last decade, global tree nut production has steadily increased, reaching some 4.6 million tons in the 2019/2020 season. The most common crops were almonds and walnuts, representing 31% and 21% of the global share,

followed by cashews (17%), pistachios (14%), and hazelnuts (12%). The other 5 percent is divided amongst pecans, macadamia nuts and pine nuts of Brazil. An overview of the growth patterns in cropping over the past ten years reveals the most substantial linear rises in relatively large crops such as macadamia, walnut, cassava, almond, and pecan.



With annual growth rates as follows:

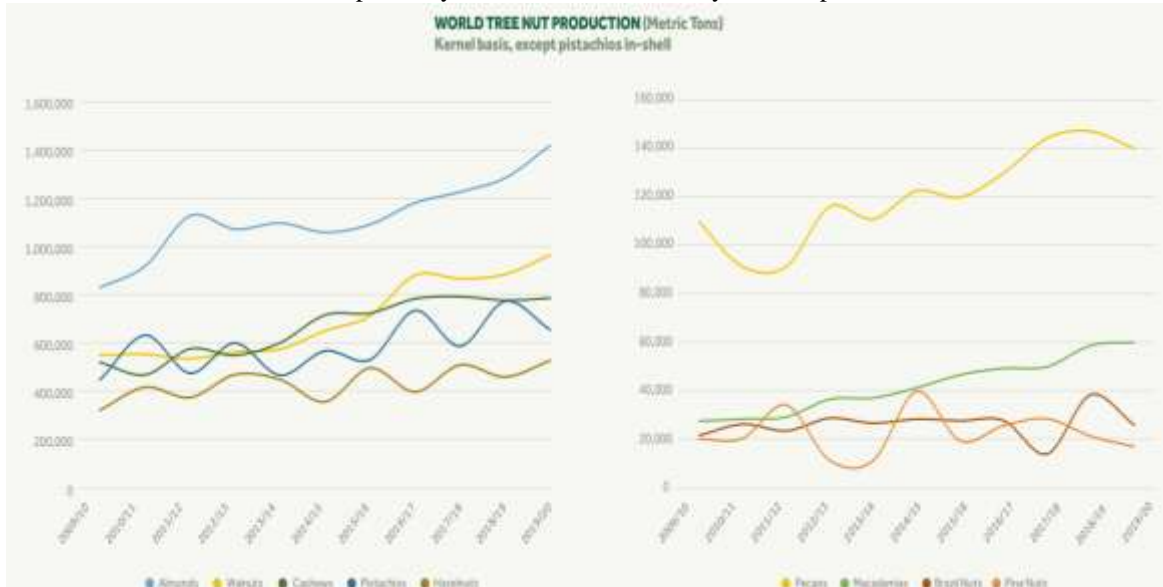
- Macadamia: 3.459 MT/year.
- Walnuts: 46.932 MT/year
- Cashew: 34.491 MT/year
- Almond: 44,687 MT/year
- Pecans: 5.184 MT/ year.

The USA remained the leading global tree nut production with 38% share in 2018/2019. The

most developed crops were pistachios (19%), almonds (62% of the country share), and walnuts (15%). Turkey produced 11% of the global tree nut crops. About 78% of Turkish tree nut production is made up of hazelnuts followed by pistachios 17%. China, which accounted for up to 10% of the global share, was the third largest producer nation. Approximately 96% of the tree nut production in the country was of walnuts. The 6%, 4% and 3% of

global production respectively accounted for Iran, India and Côte d'Ivoire respectively. Iran

represented its output of pistachios, and India and the Ivory Coast represented its cashew.

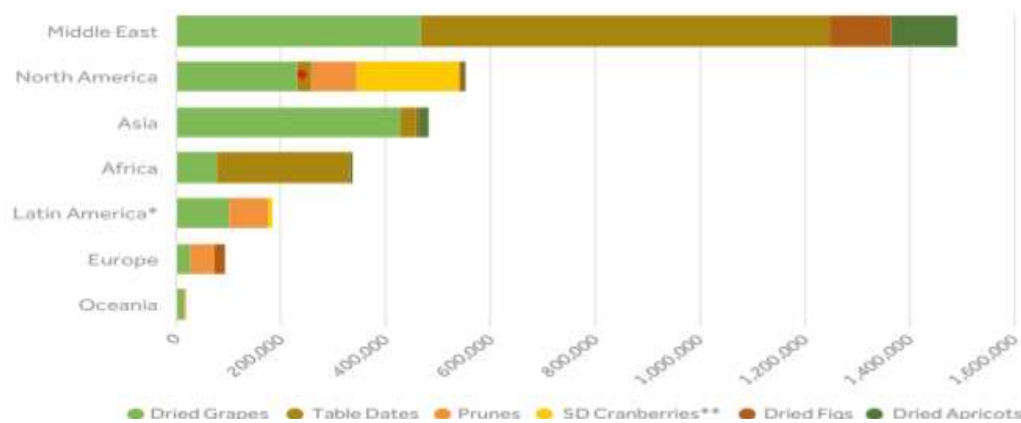


4.4 WORLD DRIED FRUIT PRODUCTION BY REGION

The Middle East continued to be a global leader in the production of dried fruits in 2019-20, representing 52% and 31% of regional production

of table dates and dried grapes respectively with 47% of the world share. North America, Asia and Africa contributed 17 per cent, 15 per cent and 11 per cent of the world's dried fruit production.

2019/20 WORLD DRIED FRUIT PRODUCTION BY REGION (Metric Tons)

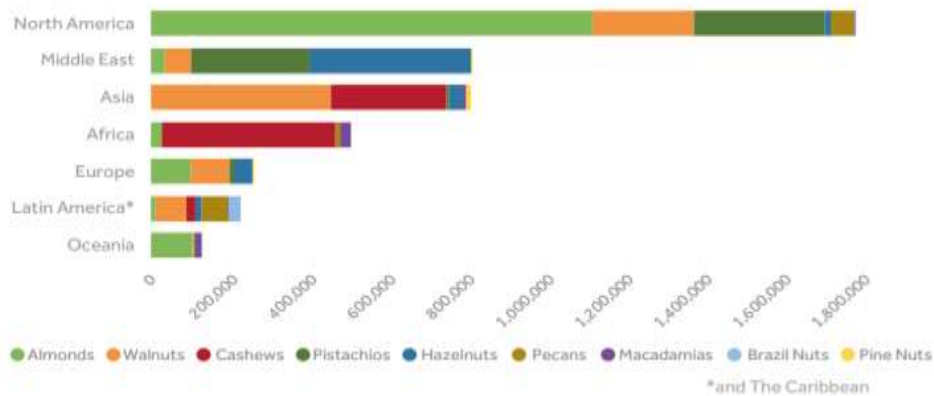


4.5 WORLD TREE NUT PRODUCTION BY REGION

In 2019/2020, North America produced for 40 % of the world's share of nut trees and the Middle East (18 % of world volume) production

consisted mainly of hazelnuts (50%In Asia, walnuts (56%) and cashews (36%) dominated tree nut production, while cashews amounted to 88% of African crops.

2019/20 WORLD TREE NUT PRODUCTION BY REGION (Metric Tons)
 Kernel basis, except pistachios in-shell



4.6 WORLD DRIED FRUIT PRODUCTION BY GNI

The producer nations were listed according to a per-capita gross domestic income (GNI), Atlas system (current US\$), according to the World Bank in order to determine these patterns. Indicators for global development: high-revenue (GNI per capita of \$1,026 to \$1,375), medium-revenue economies (including low-medium-

revenue and high-mixed-income economies), and low-income (\$1,025 or less). Dried fruit, mainly grown in mid- and high-income economies, constitute 65% and 34% respectively of world production. Over the previous 10 years the production in both groups has increased significantly (50,426 MT/year in mid-GNI and 29,586 MT/year in high-GNI).

WORLD DRIED FRUIT PRODUCTION BY GNI* (Metric Tons)

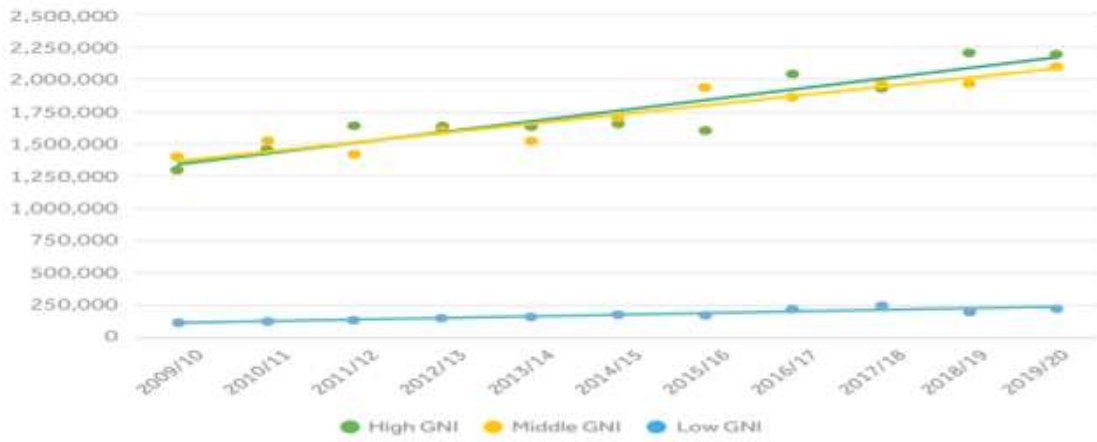


4.6 WORLD TREE NUT PRODUCTION BY GNI

In the last decade, the production of tree nut has been mainly centered in high- and medium-

income economies and has continued to increase at an average rate of 82,623 metric tons per year and 71,605 MT/year respectively.

WORLD TREE NUT PRODUCTION BY GNI* (Metric Tons)
 Kernel basis, except pistachios in-shell



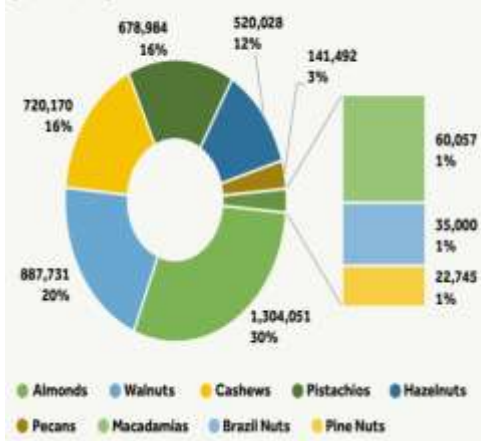
V. GLOBAL CONSUMPTION

5.1 GLOBAL TREE NUT CONSUMPTION

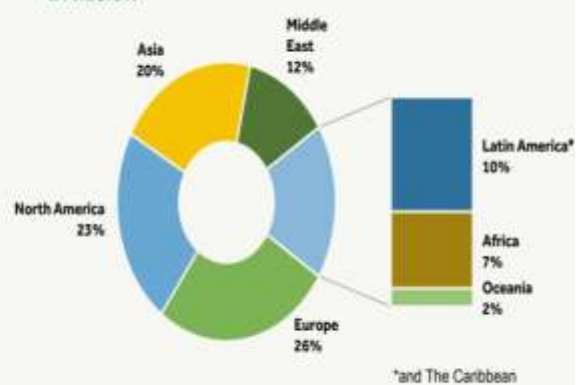
Almonds and walnuts represented half the estimated total tree nut consumption worldwide in 2018 (30% and 20% of the world's share), led by

cashews and pistachios, each 16%. After Europe, which was the lead consumer, the second and third largest customers were North America and Asia, which had similar shares in consumption regions.

2018 WORLD TREE NUT ESTIMATED CONSUMPTION
 (Metric Tons)



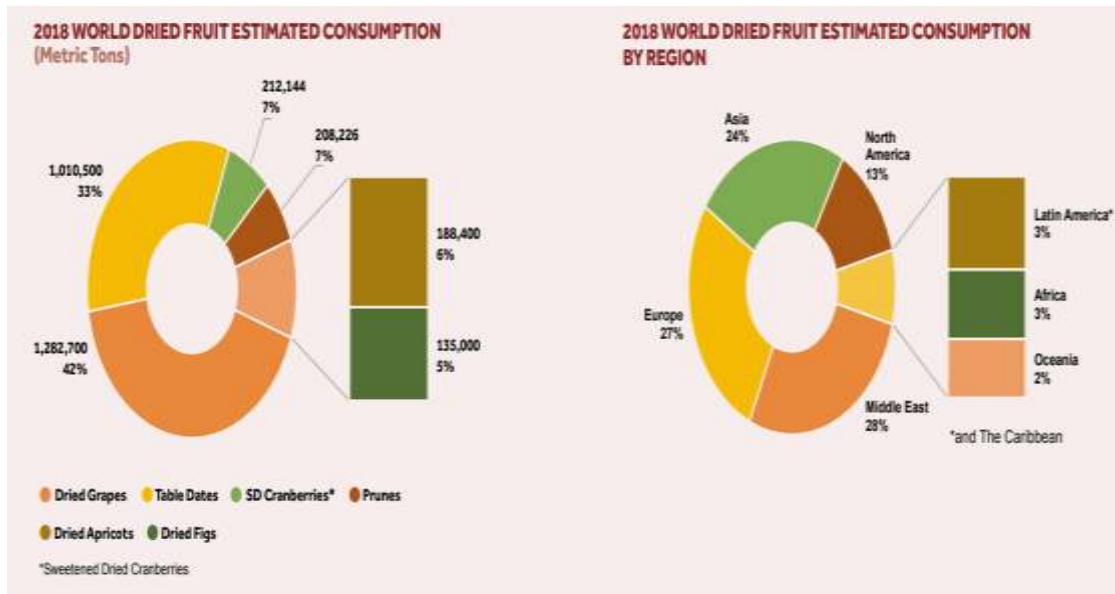
2018 WORLD TREE NUT ESTIMATED CONSUMPTION BY REGION



5.2 GLOBAL DRIED FRUIT CONSUMPTION

Europe accounted for approximately 27% of global consumption of dried fruit in 2018. As far as world dried fruit consumption is concerned, dried grapes (Raisins, Sultanas and Currants)

accounted for a substantial 42% of the share in 2018. They added up to 75% of global consumption along with table dates. The Middle East and Europe have concentrated more than half of the world's share, followed closely by Asia.

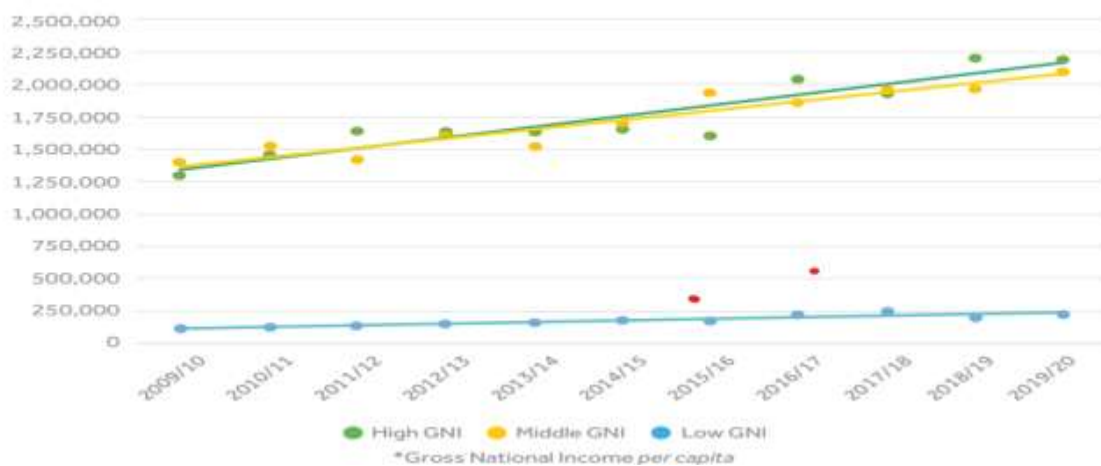


5.3 GLOBAL TREE NUT AND DRIED FRUIT CONSUMPTION BY GNI

Tree nut and dried fruit were more consumed in high- and middle-income economies in the period 2008-2018 (55% and 43% of world share of tree nut in 2018 and 56%, and 42% of dried fruit in 2018). Tree nut consumption was the largest increment in middle-income countries,

averaging 111,724 metric tonnes of growth in 2008-2018. The following sector showed a positive trend with low growth rates in high revenue economies. GNI origins was pronounced less. Similarly, dried fruit showed the same pattern, for which in middle income economies the increase rate averaged MT 41,952 per year.

WORLD TREE NUT PRODUCTION BY GNI* (Metric Tons)
 Kernel basis, except pistachios in-shell



WORLD DRIED FRUIT ESTIMATED CONSUMPTION BY GNI* (Metric Tons)



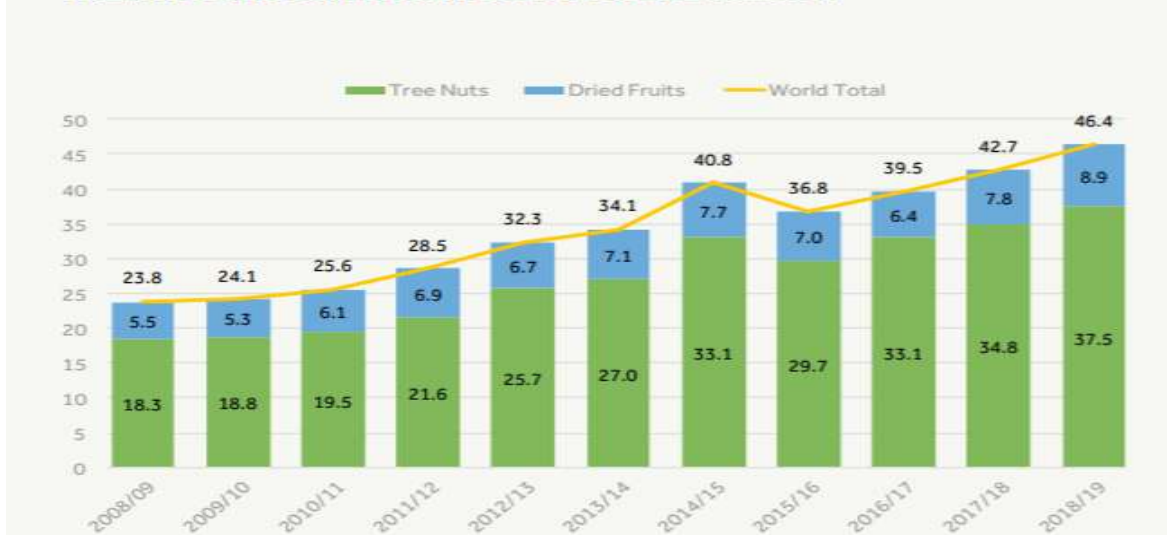
VI. SUPPLY VALUE

Throughout the last decade the tree nut and dried fruit total supply value kept increasing at a steady pace. It amounted to about 46.4 billion in 2018/2019.

Dollars, up by 41 per cent from the previous 10-year average, and 95% higher than the 2008/09 era. The largest rise in this Season was observed compared to the previous one for

pistachio, the supply value increased by 45 percent. In turn, the value of macadamia. Increased by 33 per cent from 2017/18 and by 103 per cent from the previous year. Average 10-years. The prices of dried fruits, dried grapes and dried figs increased the most compared to the previous season. (31% and 25%, respectively) while the date of the table has increased. A significant 73 percent average over the previous decade.

TREE NUT AND DRIED FRUIT SUPPLY VALUE (Billion \$)



VII. CASE STUDY ON EUROPEAN MARKET

7.1 PRODUCTION

Since 2013, the production of edible nuts and dried fruit in Europe has steadily increased to € 5.3 billion in 2017. The European Union produces more nuts than dried fruit. The most commonly

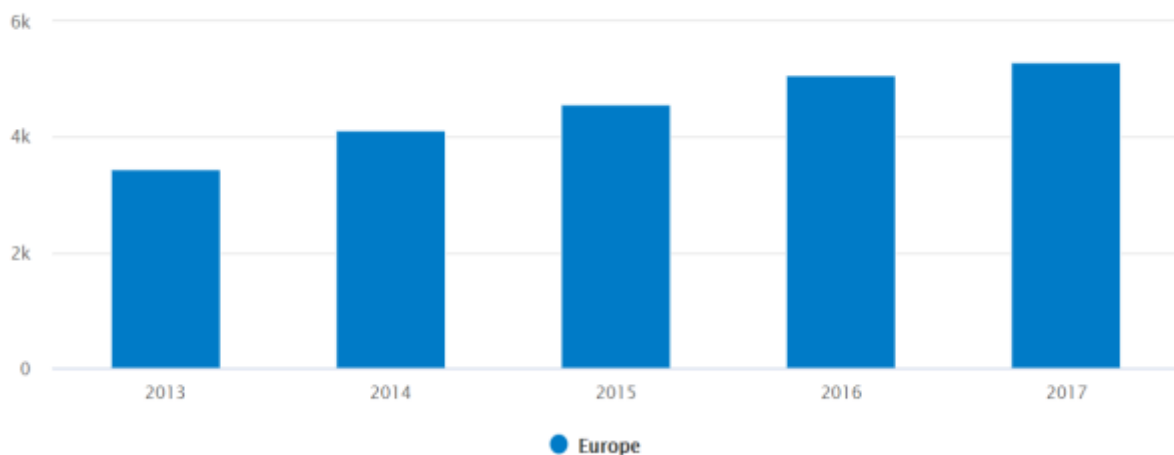
grown edible nuts in Europe are hazelnuts and almonds, while the most commonly produced dried fruit is dried figs and prunes. United Kingdom, the Spain, the Netherlands and Italy are major producers of processed edible nuts and dried fruit. However, this involves processing such as blending, roasting, coating and repacking of

imported products. In terms of primary production (growing, harvesting and drying), Spain (almonds), Italy (hazelnuts), France (prunes) and Greece (dried grapes) are the main European producers.

Spain is the 3rd largest producer of almonds and the 5th largest producer of dried figs in the world. Italy is the second largest producer of hazelnuts and sixth largest producer of dried figs. Greece is the 4th largest producer of dried figs and the 9th largest producer of dried grapes. France is the 3rd largest producer of prunes and the 7th largest producer of walnuts. Portugal is also an

important producer of dried figs. The Netherlands and the United Kingdom are large processors of imported nuts (mainly peanuts).

Imported nuts and dried fruit are commonly used by the confectionery, baking and sweets industries for further processing. Some of the production (processing) country leaders are Voicevale (UK), SeeBerger (Germany), Intersnack (Netherlands), CG Hacking & Sons (UK), V.Besana (Italy), Borges (Spain), Bosch Boden Spies (Germany), and Mariani Packing (USA-based, but spreading sales to Europe).

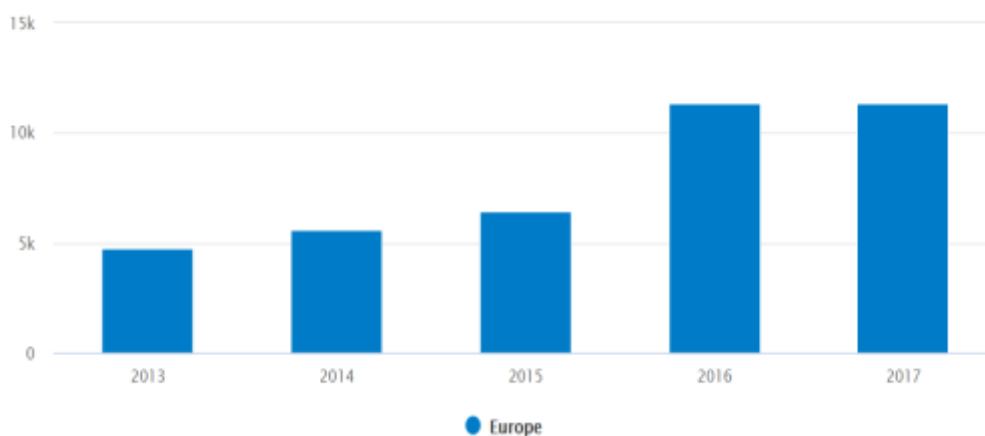


Total European production of dried fruit

7.2 CONSUMPTION

In terms of volume, the apparent consumption increased from EUR 4.8 billion in 2013 to more than EUR 11 billion in 2017. While there is a high rise in demand, this very high consumption value is due to the high prices of imported cashew nuts. Stimulated by a steady movement towards healthy lifestyles, it is expected that European consumers will increasingly enjoy edible nuts and dried fruits. While Europe produces

just 10% of the world's tree nut production, it was the largest user with a 25% share of world consumption in 2017. Almonds are the most eaten nut in Europe, followed by walnuts and hazelnuts. Europe produces about 8% of the world's production of dried fruit; but, compared to nuts, it is the world's largest user of dried fruit, accounting for 26 % of its consumption in 2017. Prunes and dried grapes are the dried fruits most eaten in Europe.



Total European consumption of dried fruit

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