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Evaluating Competitive Advantages and Market Dynamics in the Global Raisin Industry

Morteza Majidian[1], and Esmaeil Pishbahar[1*]

Abstract

Raisins are a key export commodity due to their nutritional value and global demand. This study evaluates the worldwide raisin industry's competitive advantages and market structure using data from the International Trade Center (2004–2023). Employing Revealed Comparative Advantage (RCA), Revealed Symmetric Comparative Advantage (RSCA), Concentration Ratio (CR), Herfindahl-Hirschman Index (HHI), and Trade Competitiveness Index (TCI), the analysis identifies Turkey, the United States, Iran, and Chile as leading exporters, accounting for 64.5% of the market share. Results indicate an oligopolistic market structure with concentrated competition among a few nations. Turkey, the United States, Afghanistan, Uzbekistan, and Iran exhibit strong RSCA values (near 1), reflecting expertise in raisin exports, while Turkey, Iran, Uzbekistan, Afghanistan, and Argentina show high TCI scores, indicating robust competitiveness. The study highlights shifts in market dynamics, with emerging exporters like Afghanistan challenging traditional leaders. To enhance their global position, exporters should improve production efficiency, diversify markets, and invest in branding. These findings contribute to understanding trade competitiveness and market evolution in agricultural exports, offering strategic insights for policymakers and industry stakeholders.

Keywords: Global Raisin Trade, Market Structure Analysis, Global Competitiveness Index, Leading Raisin Exporters, Revealed Comparative Advantage
JEL Classification: F14, Q17, L11, Q13, L13.

1. Introduction

Dried fruits, particularly raisins derived from grape desiccation, are widely consumed globally and hold significant economic value. The global raisin industry contributes substantially to production and trade, with worldwide grape output exceeding 77 million tons in 2018 (OIV, 2022), of which 7% yielded 1.21 million tons of raisins (USDA, 2019). As a key agricultural commodity, raisins enhance the grape value chain and bolster exporting nations' economies (Soltani and Saghaian, 2012). However, competitiveness in this market is shaped by grape production

[1] Department of Agricultural Economics, Faculty of Agriculture, College of Agriculture and Natural Resources, University of Tehran, Karaj, Islamic Republic of Iran.
Corresponding's author; e-mail: esmaeil.pishbahar@ut.ac.ir

fluctuations, market structure, and trade policies (Aminizadeh et al., 2015). Traditional exporters like Turkey, the United States, and Iran face challenges such as declining market share and price volatility, necessitating a detailed analysis of market dynamics and strategic opportunities.

Global grape production rose 20.1% from 72.9 million tons in 2004 to 87.6 million tons in 2022, peaking at 93.8 million tons in 2018 before declining (FAO, 2024; Fig. 1). Climate change and economic factors drive these shifts (Protzman, 2022). Raisin exports grew 44% from 713.7 thousand tons in 2004 to 1 million tons in 2021, dropping to 946.4 thousand tons in 2022 (ITC, 2024; Fig. 2). Post-2015 stability (9% growth) highlights the need for robust trade policies to sustain market share amidst rising competition.

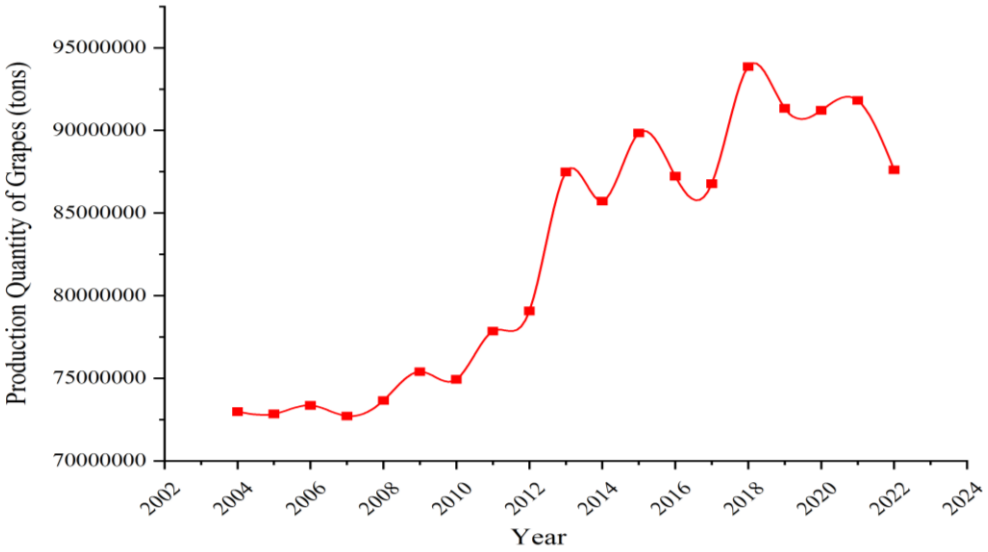

Figure 1. Global Grape Production Volume (2004–2022).

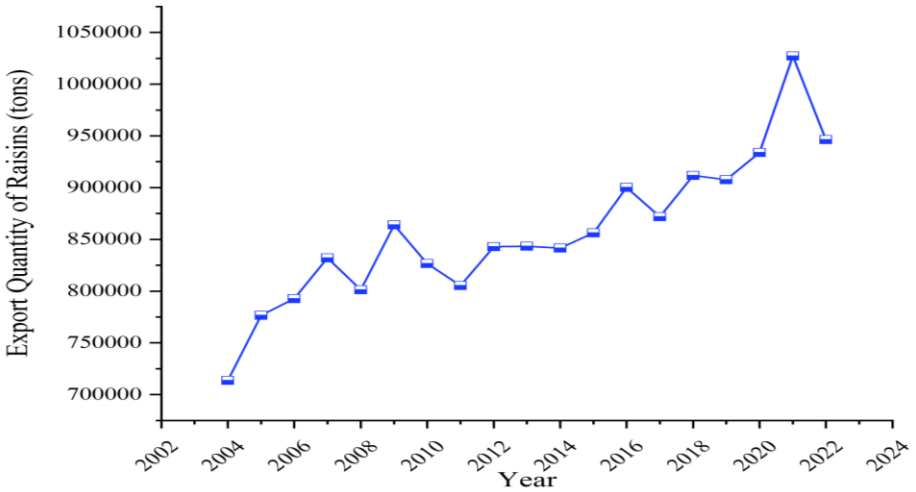

Figure 2. Global Raisin Export Volume (2004–2022).

Competitiveness, rooted in theories by Smith, Ricardo, and Balassa (Maneschi, 1992; Balassa, 1965), is assessed via the Revealed Comparative Advantage (RCA) index, where values above 1 indicate export strength (Borodin, 2006). Recent studies (e.g., Majidian et al., 2022; Israrullah et al., 2023) analyze raisin trade but often focus narrowly. This study advances prior work by integrating RCA, RSCA, HHI, CR, and TCI across a 20-year dataset (2004–2023), offering a global perspective on market structure and competitiveness (Tables 1–2). Unlike single-country analyses, it compares leading exporters and identifies strategic shifts, aiding policymakers and exporters in enhancing market position and fostering sustainable trade development.

Table 1. Overview of Methods and Approaches in Previous Studies.

Study	Data	Findings	Methods
Yu et al., 2022	export value, import value, export quantity, (2010–2019)	Iran, Uzbekistan, and Kazakhstan mainly export raw liqcorice materials, while China, with its processing and trade capabilities, plays a key role in the global market. The United States, France, and Germany are among the main consumers of this product.	MS, TC, AEP
Israrullah et al., 2023	Export volumes (2006–2021)	Afghanistan demonstrated significant growth in its comparative advantage for raisin exports and maintained a high level. The transition probability matrix shows that Russia, UAE, India, and Turkey retained 72.03%, 47.33%, 35.83%, and 13.11% of their market shares, respectively.	NPC, RCA, Direction of Foreign Trade
Han et al., 2022	Export and import volumes and values (2010–2019)	The USA held the largest market share and Revealed Symmetric Comparative Advantage (RSCA) for lqicorice extract exports, followed by China and France with moderate competitiveness, while Germany faced challenges due to lower RSCA and competitiveness.	MS, RCA, RSCA, TC
Tian et al., 2024	Export/import volumes (2012–2021)	Vietnam surpassed China in agricultural product competitiveness. Chinese exports to Vietnam matched Vietnam's imports in category 0, while Vietnam's exports to China showed more complementarity in category 2.	RCA, TC
Nabi et al., 2019	Export volumes (1995–2017)	India demonstrated comparative export advantages in fish, fish products, fruits, vegetables, sugar, sugar products, miscellaneous foods, wood, and metals against the USA, UK, UAE, Singapore, and China.	RCA, RSCA
Montes Ninaquispe et al., 2024	Export volumes and values (2013–2022)	Peru's fresh grape exports grew at a compound annual growth rate of 12.02% and 12.13% in value and volume, respectively. Exports reached an average of 151.2 destinations, with the highest export share to Mexico (63.2%) and the lowest to the Netherlands (1.6%). The Herfindahl index indicated market concentration in the USA and stability in the number of destinations.	RCA, HHI

Table 2. Comparison of This Study with Existing Research.

Source	Dataset Size	Global Scope	RCA	RSCA	HHI	Market Structure	CR	TC	MS
Yu et al., 2022	Insufficient	✓	×	×	×	×	×	✓	✓
Nabi et al., 2019	Insufficient	✓	✓	✓	×	×	×	×	×
Han et al., 2022	Insufficient	✓	✓	✓	×	×	×	✓	✓
Israrullah et al., 2023	Intermediate	×	✓	×	×	×	×	×	×
Tian et al., 2024	Intermediate	×	✓	×	×	×	×	✓	×
Montes Ninaquispe et al., 2024	Intermediate	×	✓	×	✓	×	×	×	×
Present Study	Large	✓	✓	✓	✓	✓	✓	✓	✓

2. Materials and Methods

The international competitiveness of a given industry or product is typically evaluated using a range of indicators, including international market share, trade competitiveness, revealed symmetric comparative advantage, and market concentration. In the present study, five principal indicators- RCA, RSCA, Concentration Ratio (CR), Herfindahl-Hirschman Index (HHI), and Trade Competitiveness Index (TCI)- were systematically selected to facilitate a comprehensive and multidimensional assessment of the export performance of raisins. Collectively, these indicators provide valuable insights into static comparative advantage (RCA, RSCA), the strength of trade balance (TCI), and structural characteristics of the market (CR, HHI). By integrating these indices, the study endeavors to capture both the depth of individual countries' competitiveness and the broader structural trends prevailing in the global raisin market. This methodological approach is closely aligned with the study's overarching objective of analyzing long-term trade competitiveness and the evolving dynamics of a strategically significant agricultural sector.

2.1. Market Share (MS)

Market share reflects a country's export proportion of a product in global trade, indicating its competitive capacity. A higher MS suggests stronger competitiveness. It is calculated as (Sajid & Ertz, 2024):

$$MS_{ij} = \frac{X_{ij}}{X_{wj}} \times 100 \quad (1)$$

where X_{ij} is the export quantity of raisins (product j) from country i, and X_{wj} is the global export quantity of raisins. This study analyzes *MS* for leading raisin exporters.

2.2. Concentration Ratio (CR_n)

The CR_n measures export concentration among major countries, revealing market structure (perfect competition to monopoly). It is defined as (Schaen & Maijoor, 1997):

$$\boldsymbol{CR_n = MS_1 + MS_2 + \cdots + MS_n = \sum_{i=1}^{n} MS_{i_{2,\ldots,k}} \quad (k > n} \tag{2}$$

where k is the total number of raisin exporters, n is the number of top exporters, and MS_i is the market share of exporter i. This index assesses concentration among key raisin exporters.

2.3. Herfindahl-Hirschman Index (HHI)

The HHI addresses CR_n limitations by summing squared market shares of all exporters (Straume et al., 2024):

$$\boldsymbol{HHI = MS_1^{\,2} + MS_2^{\,2} + \cdots + MS_n^{\,2} = \sum_{i=1}^{K} MS_i^{\,2}} \tag{3}$$

where k is the number of raisin exporters globally, and MS_i is the market share of exporter i. Low HHI values indicate competition, while values near 1 suggest monopoly. Combined with CR_n (Table 3), HHI evaluates raisin market concentration.

Table 3. Types of Market Structure Based on CRn and HHI Indices.

Main Feature Market	Herfindahl-Hirschman Index (HHI)	Concentration Ratio (Percentage)	Market Type
More than 50 competing firms exist without any single firm holding a significant market share.	$\mathrm{HHI} \to 0$	$\mathrm{CR}_1 \to 10$	Perfect Competition
No competing firm holds more than 10% of the market share.	$(1/\mathrm{HHI}) \to 10$	$\mathrm{CR}_1 < 10$	Exclusive Competition
Four firms collectively hold a monopoly of up to 40% of the market.	$6 < (1/\mathrm{HHI}) \leq 10$	$\mathrm{CR}_4 < 40$	Open Multilateral Monopoly
Firms collectively hold at least 60% of the market share.	$3 < (1/\mathrm{HHI}) \leq 6$	$\mathrm{CR}_4 > 60$	Closed Multilateral Monopoly
One firm monopolizes more than 50% of the market.	$1 < (1/\mathrm{HHI}) \leq 3$	$\mathrm{CR}_1 \geq 50$	Dominant Enterprise
One firm monopolizes the entire market.	$\mathrm{HHI} \to 1$	$\mathrm{CR}_1 \to 100$	Monopoly

2.4. Trade Competitiveness (TC)

TC measures a country's net export capacity relative to total trade, ranging from -1 (weak) to +1 (strong) (Han et al., 2022):

$$TC_{ij} = \frac{X_{ij} - M_{ij}}{X_{ij} + M_{ij}} \quad (4)$$

where X_{ij} and M_{ij} are export and import values of raisins (product j) for country i. This study uses TC to compare competitiveness among major raisin exporters.

2.5. Revealed Comparative Advantage (RCA)

Introduced by Balassa (1965), RCA quantifies export advantage:

$$RCA_{ij} = \frac{\frac{X_{ij}}{\sum_i X_{ij}}}{\frac{\sum_j X_{ij}}{\sum_i \sum_j X_{ij}}} \quad (5)$$

where X_{ij} is the export value of raisins from country i, $\sum_i X_{ij}$ is country i's total exports, $\sum_j X_{ij}$ is global raisin exports, and $\sum_i \sum_j X_{ij}$ is total world exports. Values > 1 indicate advantage (Panico et al., 2024).

The Revealed Symmetric Comparative Advantage (RSCA) adjusts RCA asymmetry (Dalum et al., 1998):

$$RSCA_{ij} = \frac{RCA_{ij} - 1}{RCA_{ij} + 1} \quad (6)$$

RSCA ranges from -1 (no advantage) to +1 (strong advantage). Data on raisin exports, imports, and grape production (2004–2023) were sourced from FAO and ITC databases, with indices calculated using Excel.

The 2004–2023 period was selected based on the availability of consistent and complete trade data from international databases. A 20-year span allows for the detection of structural patterns, long-term shifts in competitiveness, and the evaluation of market concentration dynamics over time.

3. Results

3.1. International Raisin Trade Status

3.1.1. Global Raisin Trade Status

Figure 3A shows global raisin export values from 2004 to 2023. Exports rose 147.2% from $822 million in 2004 to $2,032.6 million in 2012, then declined 24.6% to $1,531.9 million by 2023, with fluctuations noted in 2018–2019 (ITC, 2024).

Figure 3B details the top 12 exporters' trends. Turkey's exports grew 148% from $231.4 million (2004) to $574.2 million (2019), dropping to $508.2 million in 2023 (11.5% decline). The U.S. peaked at $409.7 million in 2014 (107% rise from 2004), falling 57.4% to $174.6 million by 2023. Iran's exports surged 228% to $354.4 million in 2012, then fell 78.5% to $76.2 million in 2023. Chile, South Africa, and Afghanistan showed varied trends, with Afghanistan rising since 2016. Post-2015 declines reflect economic recessions, production issues, and supply chain disruptions, though emerging exporters offset some losses, signaling market appeal and opportunities (ITC, 2024).

Figure 3C highlights 2023 trade flows: Turkey exported to the UK, Netherlands, Germany, Italy, France, and Australia; South Africa to Germany and Russia; Afghanistan to India and Pakistan; Iran to Iraq and UAE; and Argentina to Brazil. The top five (Turkey, Iran, Afghanistan, South Africa, Argentina) held 58% of exports, with Turkey at 35.1%. Top importers (UK, Netherlands, Germany, India, Iraq) accounted for 27.4%, with Germany and Netherlands at 14.35% each, reflecting concentrated exports and diverse imports (ITC, 2024).

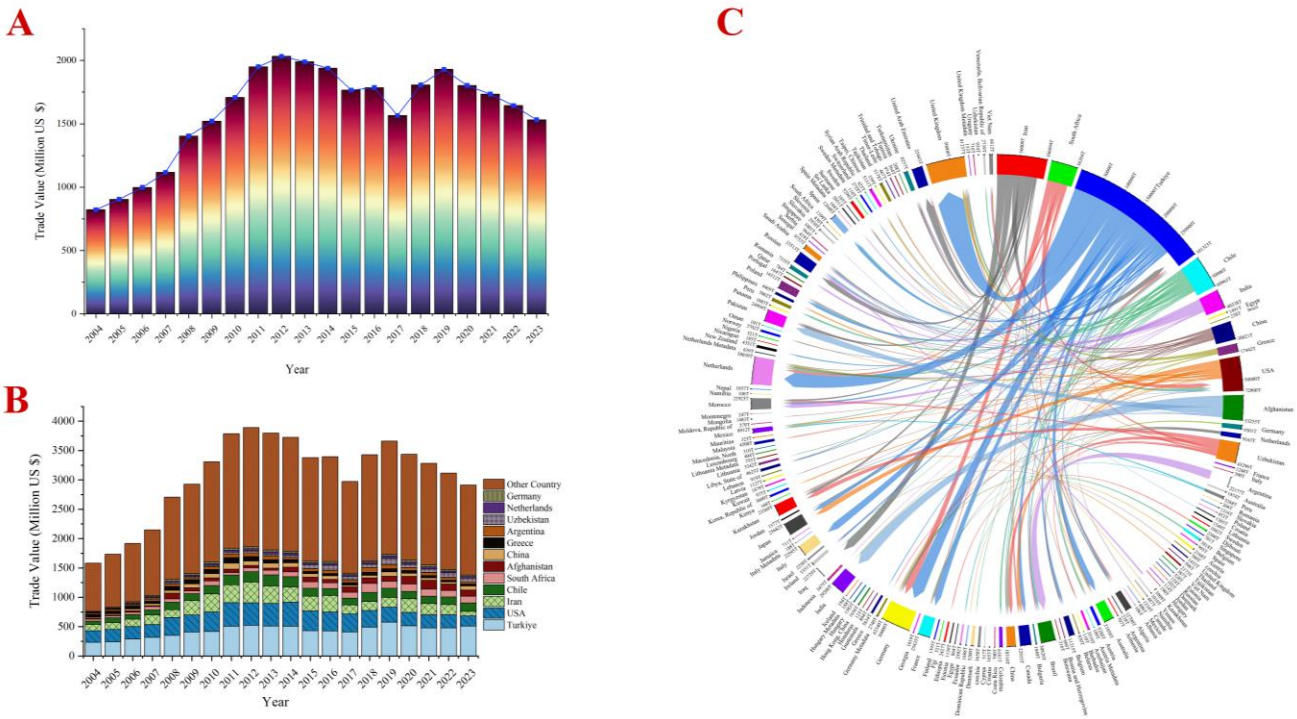

Figure 3. (A) Global Raisin Export Value (2004–2023); (B) Trends in Raisin Exports for Leading Countries (2004–2023); (C) Global Raisin Trade Flow (2023).

Figure 4 shows average import/export volumes (2004–2023). The UK led imports at 12.6%, followed by Djibouti (9.4%) and Germany (9%) (Fig. 4A). Turkey dominated exports at 28.4%, with Iran (14.5%) and the U.S. (14.2%) next (Fig. 4B), underscoring key players in the supply chain.

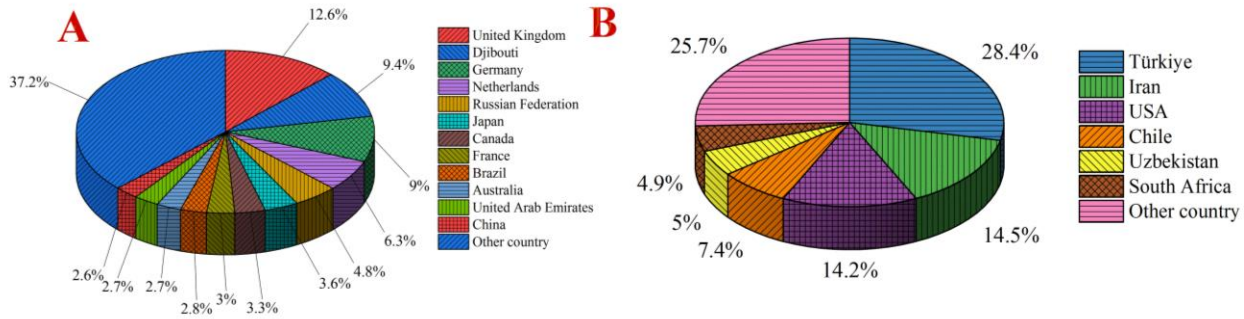

Figure 4. (A) Average Import Volumes of Top Importers; (B) Average Export Volumes of Top Exporters (2004–2023).

Table 4 analyzes market structure via CR1, CR4, HHI, and 1/HHI. Turkey's share ranged from 25%–35%, with CR4 (Turkey, U.S., Iran, Chile) averaging 56%–75%. HHI (0.12–0.17) suggests

moderate concentration, with slight increases in competition in 2021–2023. The 1/HHI indicates 6–9 active exporters, with new entrants like Afghanistan, forming a multi-oligopoly structure.

Table 4. Export Market Structure of Dried Grapes (HS 080620) Worldwide (2004–2023).

Year	CR_1	CR_4	HHI	1/HHI	Active business competitors	Market structure
2004	0.30	0.75	0.17	5.74	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2005	0.29	0.73	0.16	6.06	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2006	0.31	0.72	0.16	6.09	Turkiye, Iran, USA, Chile	Closed Multilateral monopoly
2007	0.29	0.70	0.16	6.42	Turkiye, Iran, USA, Chile	Closed Multilateral monopoly
2008	0.25	0.63	0.13	7.46	Turkiye, USA, Iran, Afghanistan	Closed Multilateral monopoly
2009	0.31	0.70	0.16	6.35	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2010	0.26	0.68	0.14	7.02	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2011	0.27	0.69	0.15	6.81	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2012	0.27	0.67	0.14	7.22	Turkiye, Iran, USA, Chile	Closed Multilateral monopoly
2013	0.27	0.66	0.14	7.33	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2014	0.28	0.68	0.15	6.83	Turkiye, USA, Iran, Chile	Closed Multilateral monopoly
2015	0.26	0.61	0.13	7.93	Turkiye, USA, Iran, Uzbekistan	Closed Multilateral monopoly
2016	0.26	0.63	0.13	7.75	Turkiye, Iran, USA, Uzbekistan	Closed Multilateral monopoly
2017	0.31	0.65	0.15	6.75	Turkiye, USA, Iran, Uzbekistan	Closed Multilateral monopoly
2018	0.31	0.60	0.14	7.14	Turkiye, Iran, USA, Uzbekistan	Closed Multilateral monopoly
2019	0.29	0.60	0.13	7.43	Turkiye, Iran, USA, Uzbekistan	Closed Multilateral monopoly
2020	0.28	0.62	0.14	7.22	Turkiye, Iran, USA, South Africa	Closed Multilateral monopoly
2021	0.25	0.56	0.12	8.60	Turkiye, Iran, Djibouti, USA	Between closed Multilateral monopoly
2022	0.29	0.57	0.13	7.61	Turkiye, Iran, Uzbekistan, USA	Between closed Multilateral monopoly
2023	0.35	0.58	0.16	6.27	Turkiye, Chile, South Africa, Afghanistan	Between closed Multilateral monopoly

The emergence of new exporters such as Afghanistan and Uzbekistan introduces significant competitive pressures for traditional market leaders like Turkey, the United States, and Iran. These newcomers, often benefiting from lower production costs, favorable climatic conditions, and growing governmental support, are capable of capturing market share in price-sensitive regions. This trend not only intensifies competition but also compels established exporters to innovate and adapt, particularly in areas of quality differentiation, technological modernization, and supply chain efficiency. Additionally, the entry of emerging players contributes to market fragmentation, potentially leading to price volatility and reduced profit margins for dominant suppliers. As these markets gain a foothold, their sustained presence could alter long-standing trade flows and necessitate strategic repositioning among global leaders.

3.1.2. Raisin Trade Status in Iran

As shown in Figure 5, Iran serves as a major exporter of raisins, with minimal imports of this product. This chart underscores Iran's significant role as one of the key producers and suppliers of raisins in global markets. The primary importing countries of Iranian raisins include both regional and extra-regional nations, such as Iraq, Russia, the UAE, and Turkey, which are pivotal to the

Iranian raisin market. Additionally, exports to European countries like Germany and the Netherlands are noteworthy, reflecting robust demand for Iranian raisins in international markets. Moreover, Iran's lack of reliance on raisin imports not only signifies adequate domestic production but also highlights its competitive advantage in producing high-quality raisins in substantial volumes. This positioning enables Iran to leverage high demand in global markets, enhance its share of global raisin exports, and boost its export revenues.

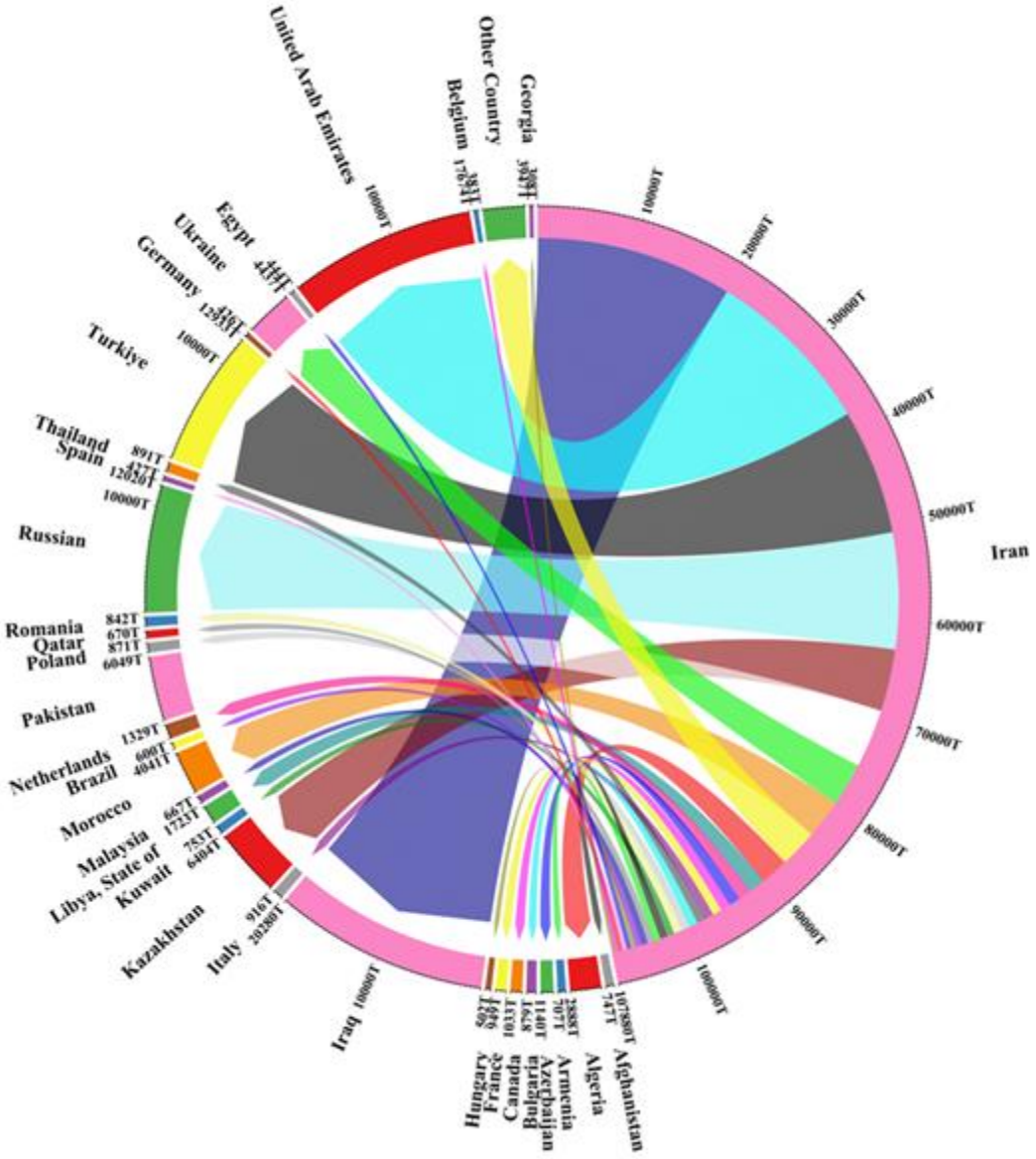

Figure 5. Raisin Trade Flow in Iran (2023).

3.2. Competitive Analysis of International Raisin Trade

Given the relative stability of major raisin-supplying countries over an extended period, this study analyzes the international competitiveness of the twelve leading exporting nations in this sector. To achieve this, five prominent countries have been selected from the following: Turkey, the United States, Iran, Chile, South Africa, Afghanistan, China, Greece, Argentina, Uzbekistan, the Netherlands, and Germany, covering the period from 2004 to 2023.

3.2.1. Market Share

Figure 6A shows Turkey's share consistently above 25%, peaking at 35% in 2023. The U.S. dropped from 19.7% (2004) to 6.5% (2023), and Iran from 19.3% to 6.1%. Chile, South Africa, and Afghanistan grew, with South Africa at 7.2% in 2023, indicating rising competition.

3.2.2. Revealed Symmetric Comparative Advantage

Figure 6B reveals Afghanistan's top RSCA (1), followed by Turkey, Iran, Uzbekistan, and Chile (>0.9). Argentina and Greece (~0.8) show stable competition, while China, Germany, and the Netherlands have negative values, indicating weak advantage.

3.2.3. Trade Competitiveness

Figure 6C shows Iran's TC at 1, with Afghanistan (0.989), Uzbekistan (0.99), Argentina (0.984), Chile (0.97), and Turkey (0.93) also high. The U.S. and Greece are moderate, while China (0.21), Netherlands, and Germany are low, reinforcing import-focused roles.

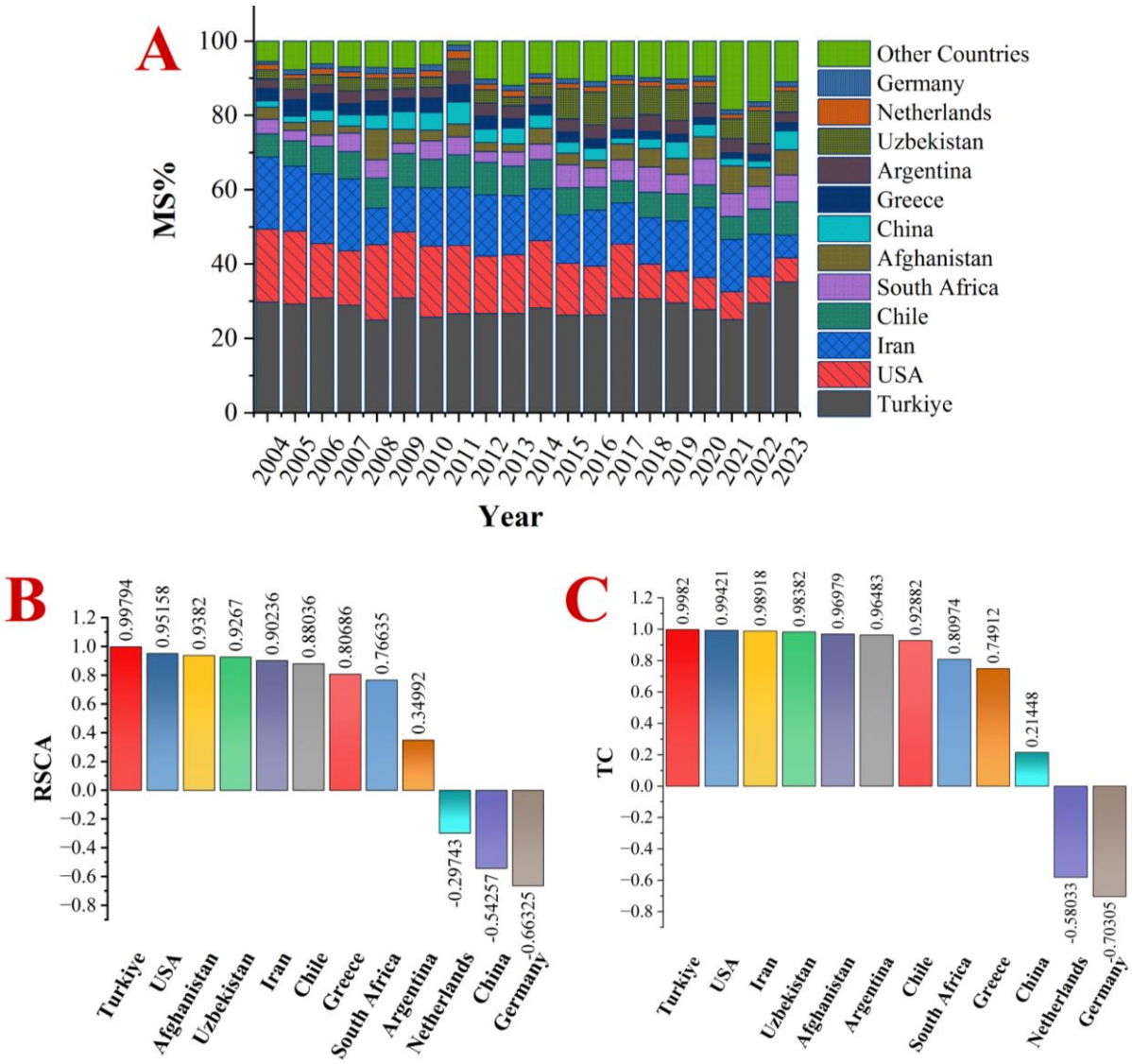

Figure 6. (A) Market Share; (B) Average RSCA; (C) Average TC (2004–2023).

As detailed in Table 5, this analysis examines market share, trade competitiveness, and revealed symmetric comparative advantage (RSCA) for the top four raisin-exporting countries from 2004 to 2023. Turkey has consistently maintained a market share exceeding 25% during most of this period, solidifying its leadership in the global market. The country's sustained export advantages and competitiveness reflect its capacity to meet global demand and effectively manage exports.

Iran, the second-largest raisin exporter in this group, has shown strong competitiveness but has faced more pronounced fluctuations in market share and RSCA. The United States has

223 experienced declines in market share, trade competitiveness (TC), and RSCA, reflecting a
224 weakening global position, especially in recent years.
225 Although Chile holds a smaller market share, it has demonstrated steady improvement in TC
226 and RSCA, enhancing its role in the global market. This analysis underscores that each country
227 has adopted distinct strategies to strengthen its position, offering valuable insights for
228 policymakers and exporters aiming to boost international competitiveness.
229
230 **Table 5.** MS, TC, and RSCA of Turkey, USA, Iran, and Chile (2004–2023).

Year	Turkiye			USA			Iran			Chile		
	MS	TC	RSCA	MS	TC	RSCA	MS	TC	RSCA	MS	TC	RSCA
2004	29.69	0.98	0.95	19.73	0.86	0.46	19.32	1.00	0.93	6.27	0.97	0.90
2005	29.18	0.98	0.95	19.57	0.70	0.46	17.54	1.00	0.91	6.79	0.94	0.92
2006	30.81	0.98	0.95	14.70	0.73	0.42	18.68	1.00	0.92	7.49	0.96	0.89
2007	28.92	0.98	0.95	14.62	0.67	0.40	19.31	1.00	0.92	7.37	0.98	0.88
2008	24.86	0.98	0.94	20.30	0.80	0.46	9.80	0.98	0.87	8.15	0.98	0.91
2009	30.86	0.98	0.94	17.73	0.81	0.38	12.05	0.99	0.93	9.06	0.97	0.90
2010	25.72	0.98	0.94	19.08	0.80	0.39	15.65	1.00	0.92	7.70	0.98	0.90
2011	26.58	0.98	0.94	18.42	0.84	0.43	15.59	1.00	0.91	8.72	0.99	0.90
2012	26.68	0.98	0.94	15.47	0.84	0.38	16.43	1.00	0.92	8.73	0.96	0.91
2013	26.64	0.86	0.94	15.84	0.83	0.40	15.83	1.00	0.94	7.96	0.96	0.92
2014	28.18	0.86	0.93	18.13	0.87	0.42	13.91	1.00	0.93	7.84	1.00	0.92
2015	26.19	0.96	0.93	13.96	0.76	0.35	13.06	1.00	0.95	7.24	0.98	0.90
2016	26.23	0.97	0.93	13.20	0.80	0.33	15.04	1.00	0.94	6.17	0.95	0.89
2017	30.80	0.97	0.93	14.55	0.81	0.38	11.06	1.00	0.90	5.94	0.95	0.90
2018	30.59	0.99	0.94	9.36	0.53	0.29	12.47	1.00	0.89	6.89	0.96	0.91
2019	29.47	0.83	0.94	8.66	0.72	0.21	13.42	1.00	0.94	7.31	0.98	0.91
2020	27.73	0.82	0.93	8.61	0.76	0.21	18.77	1.00	0.96	6.17	0.96	0.89
2021	25.04	0.83	0.93	7.50	0.72	0.24	14.02	1.00	0.94	6.17	0.96	0.89
2022	29.44	0.84	0.93	7.15	0.60	0.24	11.40	1.00	0.94	6.76	0.97	0.90
2023	35.11	0.82	0.94	6.50	0.54	0.14	6.13	0.99	0.98	9.00	0.98	0.91

231
232 ## 4. Discussion
233 The findings indicate that the global raisin market is significantly influenced by key countries
234 in the supply chain. The United Kingdom, Djibouti, and Germany are the largest importers, while
235 Turkey, Iran, and the United States are the primary exporters. This distribution underscores the
236 strategic roles of these nations in fulfilling global raisin demand and shaping the international
237 market.
238 In 2023, global raisin trade exhibited a greater concentration among exporting countries,
239 whereas importers displayed increased diversity. This scenario underscores the importance of
240 producing regions, particularly in Asia, Europe, the Americas, and Africa. The export

concentration in countries, such as Turkey and Iran, reflects their robust production capabilities and established presence in global markets, while the diversity among importers signifies an expanding demand and their essential role in shaping the supply chain.

The 20-year trend in raisin exports reveals a market concentration around a limited number of leading countries, alongside the emergence of new exporters. The decline in export values from major countries like Turkey, the United States, and Iran, coupled with the growth of emerging exporters such as Afghanistan, highlights the necessity for diversification among global suppliers. These shifts present an opportunity to create a more balanced global supply chain and enhance international cooperation.

The analysis of the global raisin market structure indicates a relatively concentrated market, with Turkey, along with three other major countries (the United States, Iran, and Chile) holding the largest market shares. Despite this concentration, competition among smaller exporting countries, such as Afghanistan and Uzbekistan, is on the rise. This trend suggests that while the raisin market remains competitive, it is still influenced by key players. For the global market, these findings emphasize the importance of fostering competition and diversification within export markets.

The findings indicate that Iran, as a leading exporter of raisins in global markets, plays a crucial role in fulfilling the raisin demand across various countries. Its capacity to produce substantial quantities of raisins, combined with minimal reliance on imports, strengthens its competitive advantage in raisin production. With significant demand in international markets, particularly from neighboring countries and select European nations, Iran has the potential to expand its share of global raisin exports, thereby increasing its export revenues.

The findings indicate that Turkey dominates the global raisin market; however, recent years have witnessed increased competition from emerging countries such as South Africa and Afghanistan. The decline in market share of key players, including the United States and Iran, alongside the rise of Central Asian and Middle Eastern nations—particularly Afghanistan and Uzbekistan—has resulted in significant shifts in market structure. These developments point to heightened competition and greater diversification within the global raisin market. Central Asian and Middle Eastern countries like Iran, Afghanistan, and Uzbekistan possess substantial competitive advantages in raisin production and exports, consistently exhibiting strong competition on the global stage. In contrast, European nations such as Germany and the

Netherlands have a diminished role in raisin exports due to relatively lower competitive advantages. These trends suggest that countries with favorable natural resources and climatic conditions, when combined with investments in infrastructure and enhanced competitiveness, can increase their market share in the global raisin market. Furthermore, nations with lower competitiveness must prioritize the development of export capacities and the improvement of product quality to effectively compete. Overall, developing countries and smaller exporters can strengthen their presence in the global market through the implementation of effective policies, which will also bolster their resilience to economic crises and market fluctuations. These results underscore the necessity for exporters to adopt coherent strategies to maintain and enhance their positions in the global market, drawing on the successful experiences of other nations.

Strategies for Enhancing Exporters' Position

To strengthen their position in the global raisin market, exporting countries must implement targeted strategies that align with market dynamics and trade competitiveness indicators. Improving production efficiency through modern agricultural technologies, such as precision irrigation and enhanced grape varieties, can increase yields while reducing costs. Streamlining post-harvest processes and optimizing supply chain logistics will minimize losses and ensure consistent quality, which is essential for maintaining competitiveness in international markets. Furthermore, reinforcing trade agreements with emerging markets such as East Asia and Africa can reduce reliance on traditional buyers and create new growth opportunities. Lowering tariff barriers and simplifying export regulations will further facilitate market expansion and enhance global reach.

Differentiating products through quality enhancement, branding, and innovative packaging is essential. Offering premium varieties, such as organic and seedless raisins, alongside advanced packaging solutions that extend shelf life, can attract high-value consumers. Furthermore, investing in digital marketing and e-commerce platforms can enhance visibility and provide direct access to international buyers, thereby reducing reliance on intermediaries. Aligning with global food safety standards, such as HACCP and ISO 22000, will ensure compliance with regulatory requirements in key importing countries. By implementing these strategies, raisin-exporting nations can strengthen their competitive advantage, expand market presence, and secure long-term sustainability in international trade.

Limitations and Suggestions for Future Research

This study focuses on quantitative indicators of international competitiveness but does not fully address non-economic factors influencing the global raisin trade. Elements such as institutional frameworks, product quality, sanitary standards, and trade regulations significantly shape market dynamics yet remain underexplored. Future research should incorporate comparative analyses of import/export tariffs and the timeline of sanitary regulations in key importing countries. Additionally, climate conditions, adherence to international quality standards, and trade policy impacts deserve further investigation for a more holistic view of competitiveness. A further limitation is the absence of econometric modeling. Applying methods like panel data regression, ARDL, or VAR in future studies could better capture the influence of exchange rates, tariffs, and transport costs, enhancing the accuracy of competitiveness evaluations.

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ارزیابی مزیت‌های نسبی و پویایی بازار در صنعت کشمش در جهان

مرتضی مجیدیان، و اسماعیل پیش بهار

چکیده

کشمش به دلیل ارزش غذایی و تقاضای جهانی یکی از کالاهای صادراتی کلیدی است. این مطالعه مزیت های نسبی صنعت کشمش در سراسر جهان و ساختار بازار را با استفاده از داده‌های مرکز تجارت بین‌المللی (2004-2023) ارزیابی می‌کند. این مطالعه با استفاده از شاخص‌های مزیت نسبی آشکار (RCA)، مزیت نسبی متقارن آشکار (RSCA)، نسبت تمرکز (CR)، شاخص هرفیندال-هیرشمن (HHI) و شاخص رقابت پذیری تجاری (TCI)، کشورهای ترکیه، ایالات متحده، ایران و شیلی را به عنوان سهم صادرکنندگان اصلی این محصول معرفی می‌کند. نتایج نشان‌دهنده یک ساختار بازار انحصاری با رقابت متمرکز در میان چند کشور است. ترکیه، ایالات متحده، افغانستان، ازبکستان و ایران مقادیر بالای RSCA (نزدیک به 1) را نشان می دهند که نشان‌دهنده تخصص در صادرات کشمش است، در حالی‌که ترکیه، ایران، ازبکستان، افغانستان و آرژانتین امتیازات TCI بالایی را نشان می‌دهند که نشان دهنده رقابت قوی بین این کشورها در سطح جهانی است. این مطالعه تغییرات در پویایی بازار را برجسته می‌کند و نشان می‌دهد که صادرکنندگان نوظهوری مانند افغانستان رهبران سنتی در این بازار را به چالش می‌کشند. صادرکنندگان این محصول برای ارتقای جایگاه جهانی خود، باید کارایی تولید را بهبود بخشند، بازارها را متنوع کنند و در برندسازی سرمایه‌گذاری کنند. این یافته‌ها به درک رقابت تجاری و تحولات بازار صادرات کشاورزی کمک می‌کند و بینش‌های استراتژیک را برای سیاستگذاران و سهامداران این صنعت ارائه می‌دهد.