Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Grapes

Jan-2026

Acreage and production trends

Grapes crop calendar of major producing countries (Table grapes)

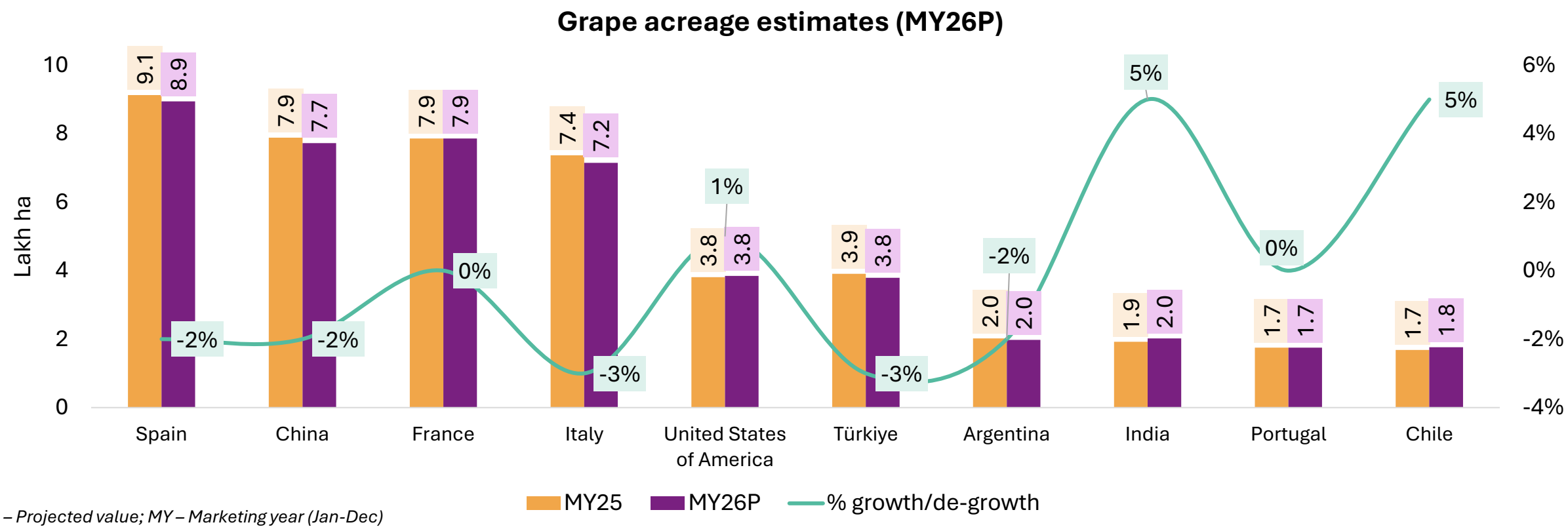
Countries	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China												
India												
Turkey												
Uzbekistan												
Egypt												
Brazil												
EU												
US												

Lean season | Peak season

- The grape harvesting season for most major producing countries, including China, Turkey, and the US, peaks between August and October.
- However, India and Brazil have a unique peak season from December to April, which gives them a market advantage during the off-season.
- This overlap in harvesting periods leads to high global supply from August to October, while India's off-season production creates opportunities for trade and strategic pricing.

Marketing year for grapes is considered as Calendar year, Jan-Dec.
MY26P refers to the current harvesting season and estimates for grapes in major producing countries during Jan'26 to Dec'26.

Acreage estimates of major producing countries

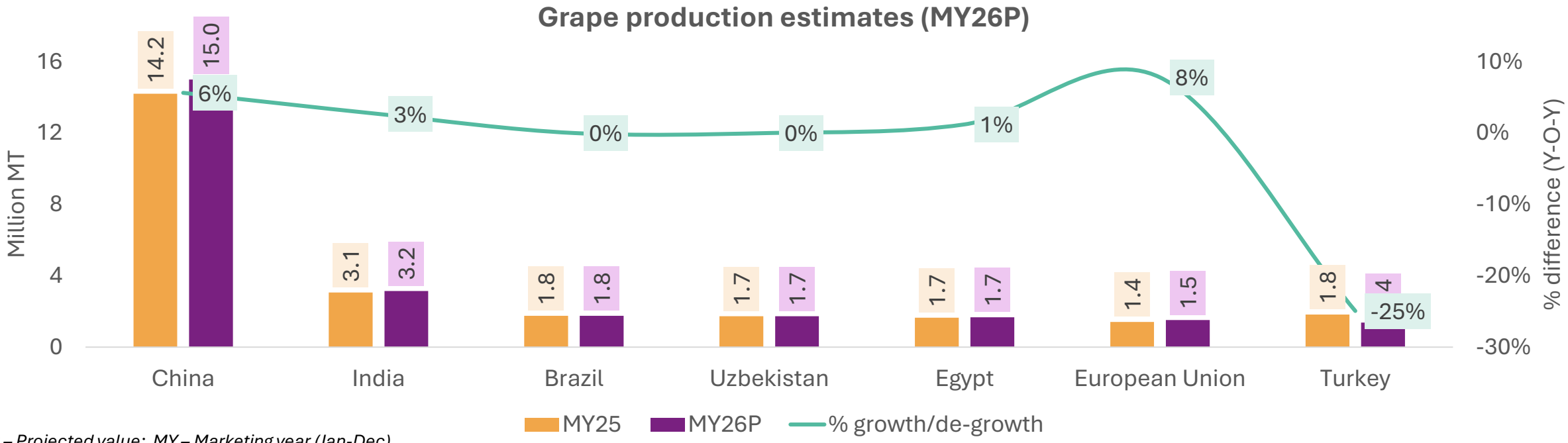


P – Projected value; MY – Marketing year (Jan-Dec)

- The countries shown in chart contribute **over 60% of global table grape area**. For MY26P, global acreage is set to **rise by 3-4% YoY**, led by USA, India and Chile.
- **China's grape acreage** is **set to decrease marginally in 2026**, influenced by **ongoing water shortages** in regions like **Xinjiang**, a shift towards **more lucrative crops**, and **declining wine demand**.
- **India's grape acreage** is at **record highs** and **expected to keep rising through 2026**, fueled by **favorable weather**, **strong price realizations**, **robust table-grape export demand**, and expansion in key states like **Maharashtra** as returns outpace alternative crops.

Source: Estimates based on FAOSTAT data

Production estimates of major producing countries



P – Projected value; MY – Marketing year (Jan-Dec)

- **Global Production:** The countries shown in the chart account for approximately 90% of global table grape production, with a 0–1% year-on-year decrease that's estimated in MY26P.
- **China**, which **accounts for approximately 50%** of global table grape production, is expected to experience a **rise of 5-6%**. In contrast, **production** from other **key producers is projected** to **grow by 1–5% year-on-year except Turkey, which shows a dip by ~25%.**
- **Turkey Production: Turkey's grape production** is **projected to decline ~25%** due to **cumulative climate shocks** (spring frost, drought, heat stress), **weakened vine health** from consecutive poor seasons, **water constraints**, and **cautious input/acreage decisions by growers** following 2025 losses.
- **Uzbekistan's grape output** is **expected to remain flat** in **2026**, supported by **expanded modern vineyards, improved irrigation coverage,** from **government programs promoting irrigation modernization** and **high-value table grape production**, despite **stable acreage**.

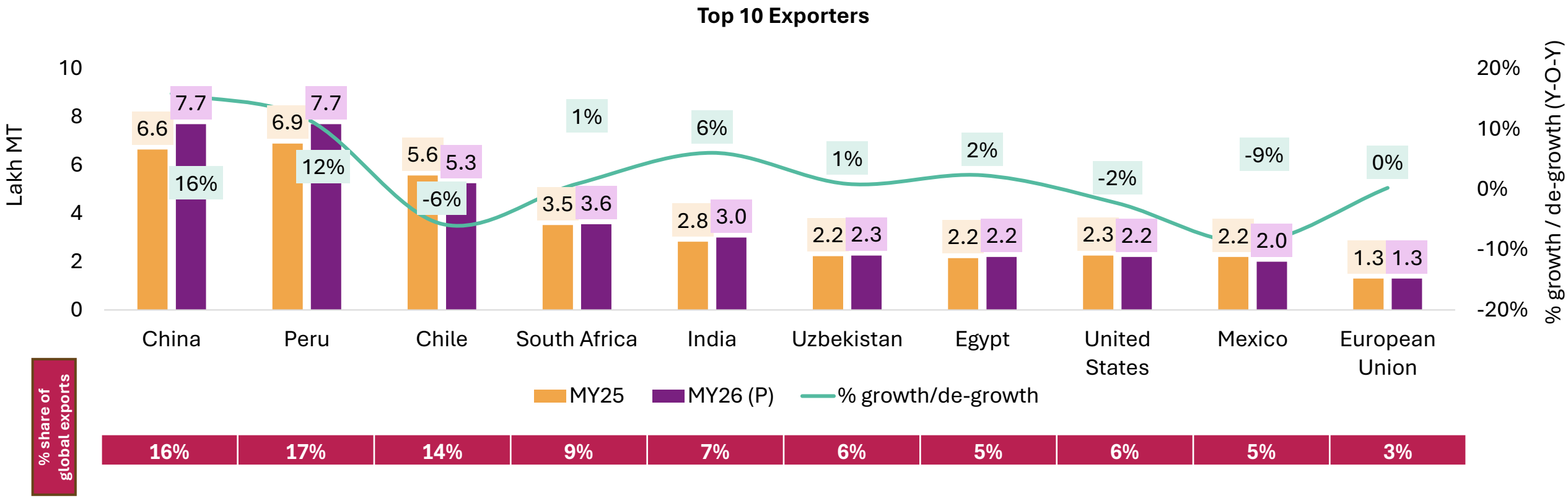
Source: USDA

Grape supply forecast for MY2026P – Insights from leading producers (table grapes)

Country	Area	Yield	Production	% share of global production	Key insights
China	Slightly Lower	High	High	**47%**	After 2025's weather disruptions, water constraints in Xinjiang, and weak wine demand, output is expected to recover in 2026, supported by improved climatic conditions, better water management, and stabilization in domestic consumption, enabling yield normalization across key vineyard regions.
India	High	High	High	**10%**	Production is expected to rise, driven by strong export demand for table grapes, enhanced farm management practices, and gradual expansion in Maharashtra, where productivity improvements, rather than area increases, are propelling output.
Brazil	Slightly lower	Higher	Stable	**6%**	Output is expected to remain stable from the significant decline in 2025 as weather conditions stabilize after drought-impacted seasons, leading to improved yields without substantial area expansion, aligning with regional crop forecasts.
Uzbekistan	Stable	Slightly higher	Stable	**6%**	Government initiatives aimed at boosting fruit exports and modernizing irrigation are anticipated to improve yields, facilitating stable production growth despite stable acreage.
Egypt	Slightly higher	Stable	Slightly higher	**6%**	Production is expected to increase as export-focused table grape farms expand through desert irrigation schemes, driven by strong European demand for early-season supply The adoption of new varieties such as Sweet Globe (white), Starlight, Melody, and Sweet Celebration has contributed to improvements in both production and quality.
EU	Stable	High	High	**5%**	Production is expected to partially recover from the 2025 decline due to improved weather conditions after frost and drought. Despite stable acreage, EU production is projected to rise by 3-4%, although long-term growth is limited by a structural reduction in vineyard area.
Turkey	Low	Low	Low	**7%**	Production is expected to decline by ~25% as vineyard removals and weak wine demand in California reduce output potential, despite occasional yield improvements.

Export trends and price outlook

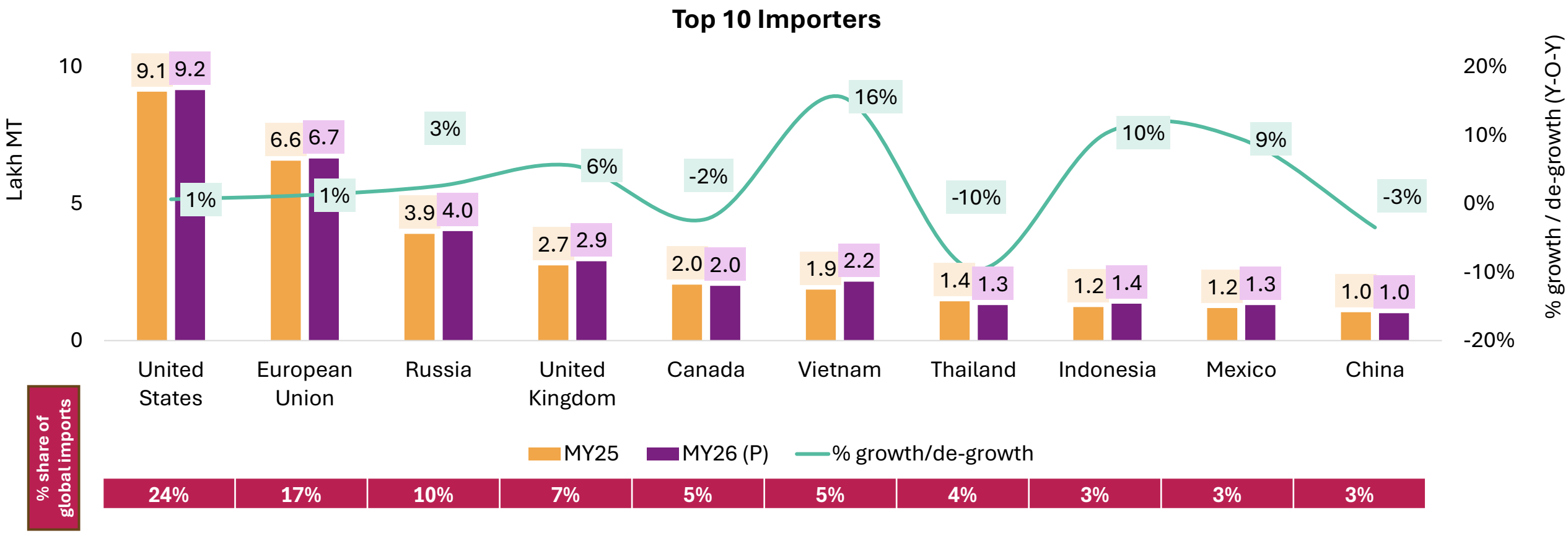
Major exporters of Grapes



- The countries shown in the chart collectively account for approximately 89% of global table grape exports.
- Global grape exports in MY26 (P) are expected to **rise modestly ~2%,** driven by **strong growth** from **China** and **Peru** due to **better logistics** and **expanded supply**. However, **adverse weather**, **rising costs**, and **increased domestic consumption** are likely to **limit exports** from **Chile** and **Mexico**, moderating overall trade.
- **South Africa's grape exports** for **MY2026** are projected to **increase by 1%**, reaching **3.6 LMT**, bolstered by **favorable weather conditions** and **enhanced logistics***. Additionally, gaining first-time access to the Philippines is opening new market opportunities and driving demand.

Note: P – Projected value; MY – Marketing year (Jan-Dec)
*Source: USDA, *South African table grape 2025-26 export season kicks off - FreshFruitPortal.com*

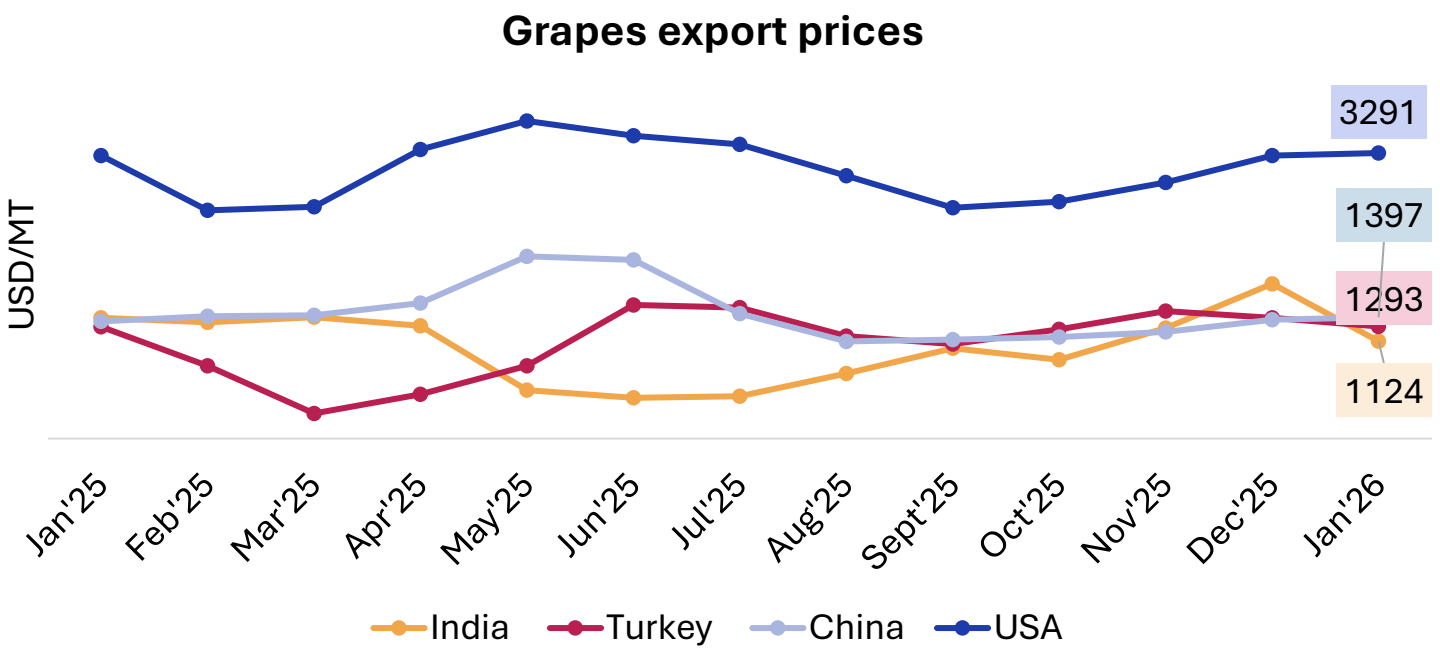
Major importers of Grapes



- The countries in the chart **account for approximately 80% of global table grape imports**. From MY20 to MY26, grape imports grew at a CAGR of 5–13% in Southeast Asia (Philippines, Indonesia, Vietnam, Malaysia), 10% in Bangladesh, 6% in Russia, and 5% in the EU.
- **Southeast Asia, a net importer of fresh produce, accounts for 4% of global fresh produce imports**. Fruit imports in the region have grown by about 20% annually over the past three years, with grapes among the top imported fruits.
- **Vietnam's grape imports** surged by **16%** to **~USD 2 billion**, led by a **47% jump** in **premium shipments** from **the United States**, reflecting **strong consumer preference** for **high-quality imported fruits** and **indicating sustained growth potential** for **table-grape imports in the near term.**

Note: P – Projected value; MY – Marketing year (Jan-Dec)
Source: USDA

Export prices forecast for grapes – Fundamental analysis

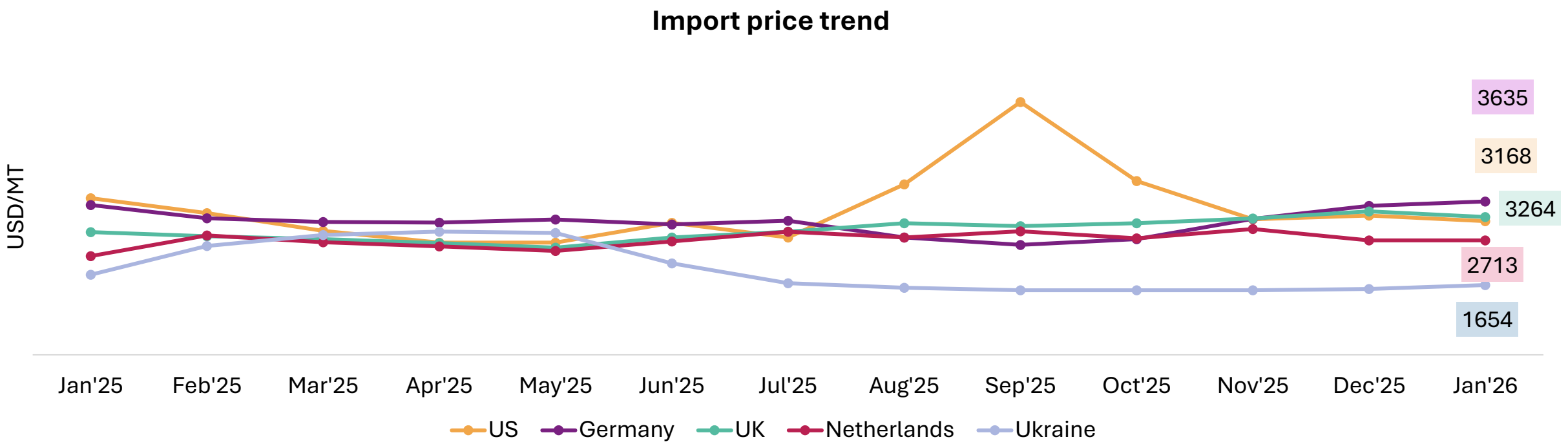


Product	Jan'26 Price (USD/MT)	Jan'25 Price (USD/MT)	%age change	Indicative price change direction	Forecasted average price range for FMA (USD/MT)
India	1,124	1,390	**-19%**	**Sideways**	1,050-1,150
Turkey	1,293	1,290	**0%**	**Bullish**	1,300-1,380
China	1,397	1,350	**4%**	**Bullish**	1,400-1,460
USA	3,291	3,260	**1%**	**Bullish**	3,320-3,380

Source: Includes findings from primary interactions and estimations & ITC trade map (HSN Code: 080610)
Note: FMA stand for February, March, and April

- **India's** grape export prices stabilized at about **USD 1,120 per metric ton** but are expected to remain **sideways** in the near term, **as peak-season harvests completed** in **December** have **boosted supplies** and **stock availability** during **January–April**, exerting downward pressure on prices.
- **China's table grape prices** are expected to **remain bullish** in the upcoming quarter as **adverse weather variability**, **water constraints** in key regions such as **Xinjiang**, and **slower vineyard expansion** are likely to **limit production** and **supply**, supporting **firmer market prices** despite subdued wine consumption growth.
- Turkey's grape export prices in January remained stable at about **USD1,290–1,300 per metric ton year-on-year** but are expected to trend **slightly bullish** in **February–April** as **improved weather conditions** support **higher yields** and **production**, enabling a **recovery** from the **drought-affected decline** observed in **2025**.

Price trends of key importing nations



- **In MY26P, U.S. grape import prices declined** about **4% month-on-month** as seasonal shifts toward lower-priced Southern Hemisphere supplies, softer post-holiday demand, adequate inventories, and easing domestic supply constraints outweighed modest declines in U.S. production, acreage, and exports, continuing the volatile price pattern seen through 2025.
- **European Union grape import prices** remained **stable**, especially in Germany and the Netherlands, due to balanced supply from Southern Hemisphere exporters, steady retail demand, and ample inventories. This led to only a slight (~1%) increase in import volumes without significant price pressure.
- **UK grape imports** are reported to **rise 6%** in **MY26P**, following last year's record. **December prices increased** as **Spain prioritized its domestic market**, **driving up export costs**.
- **Ukraine's grape imports** are **estimated to grow 2-3% in MY26P**. Declining stocks in Europe and Turkey during the lean period are tightening supply and causing slight upward pressure on domestic prices.

Source: Includes findings from primary interactions and estimations & ITC trade map (HSN Code: 080540)

Thank You

Methodology for price forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

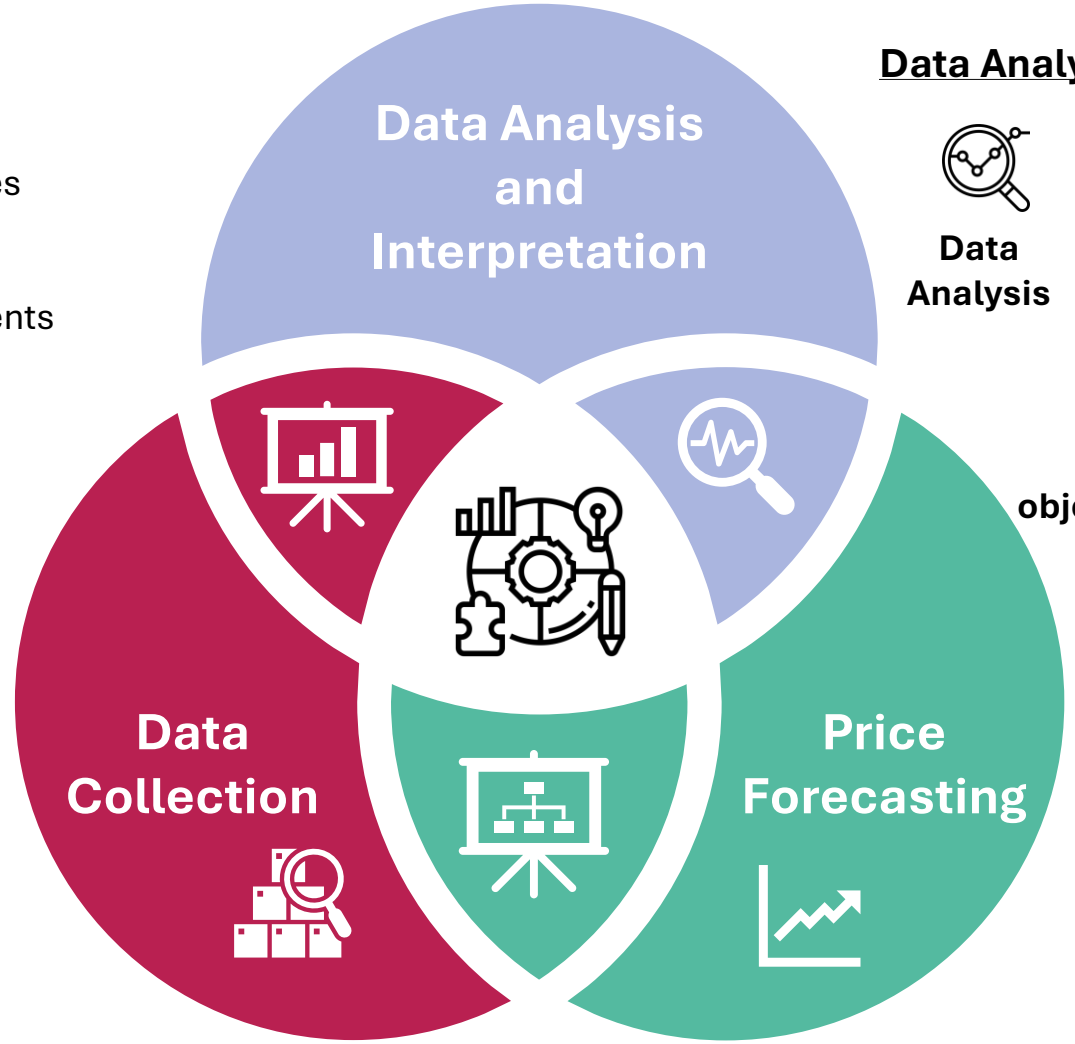
Data Collection

Sources

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports

Policy Updates

- Detailed review of Production policies & trade barriers for each country
- Data from government websites & official publications



Data Analysis and Interpretation

Data Analysis

- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations

Key objectives

- Production trends
- Trade dynamics
- Policy implications

Price Forecasting

- Historical Trend & Seasonality
- Macro-Economic & Trade Variables

Integration of commodity fundamentals and their analysis to forecast future price ranges.

Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.