

Monthly dashboard - Grapes



Acreage and production trends



Grapes crop calendar of major producing countries (Table grapes)

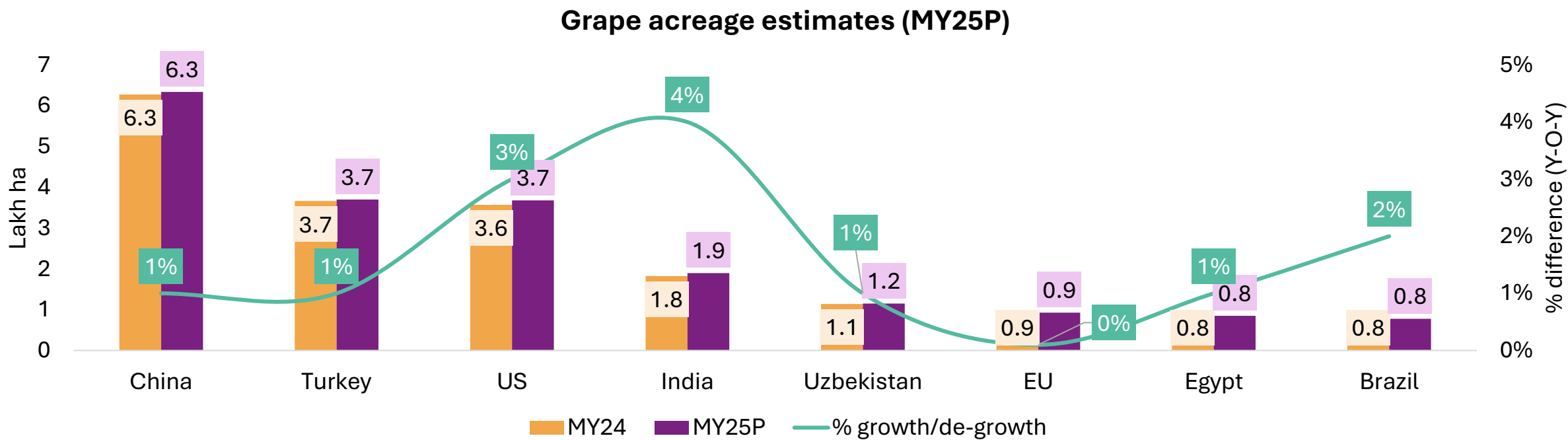
Countries	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China												
India												
Turkey												
Uzbekistan												
Egypt												
Brazil												
EU												
US												

Lean season		Peak season	
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- The grape crop calendar for major producing countries (table grapes) highlights that the peak harvesting season for most nations, including China, Turkey, Uzbekistan, Egypt, Brazil, the EU, and the US, occurs between August and October.
- India and Brazil stands out with a unique peak season ranging from December to April, which is off-season for others, providing a market advantage.
- Lean seasons vary, with gaps in production outside the peak months for each country. The overlap in harvesting from August to October indicates a high global supply during this period, while India's off-season production offers strategic opportunities for trade and pricing.

Note: As per USDA, **Marketing year (MY)** for grapes for all Northern Hemisphere countries is considered as June-May. Southern Hemisphere producer countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September. Brazil remains on a calendar year basis. MY25 refers to the current harvesting season and estimates for grapes in major producing countries.

Acreage estimates of major producing countries

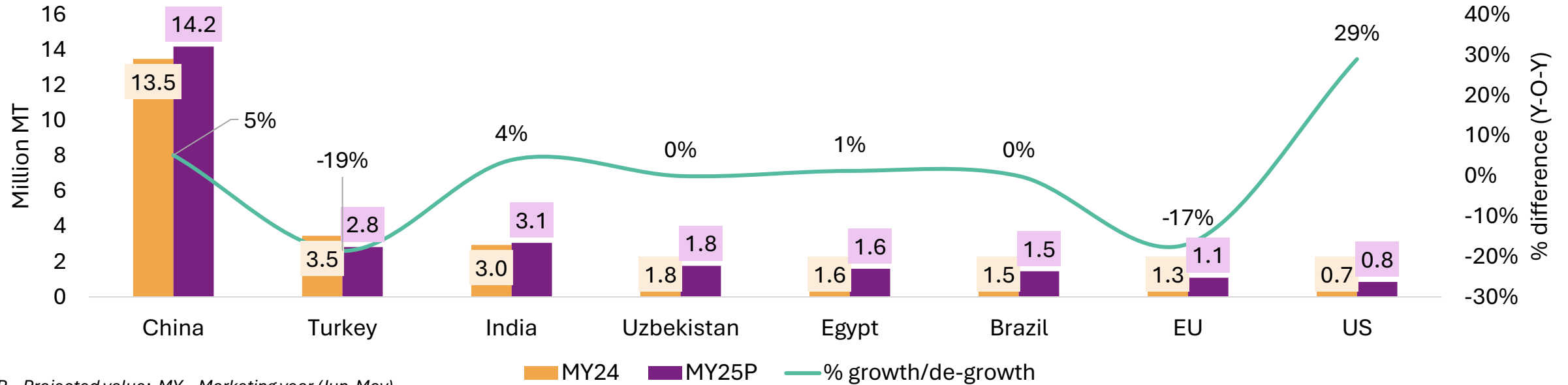


P – Projected value; MY – Marketing year (Jun-May)

- The countries shown in chart contribute over 60% of global table grape area. For MY25P, global acreage is set to rise by 3-4% YoY, led by China, US and India. Other countries are likely to remain stable or see marginal gains.
- US production in MY24 experienced a significant decline, primarily due to weather-related issues, particularly Hurricane Hilary, which severely impacted California's harvest.
- India achieved record-high acreage in MY24 and is expected to see further expansion in MY25P, driven by favorable climatic conditions and strong price realization.

Production estimates of major producing countries

Grape production estimates (MY26)



- **Global Production:** The countries in the chart **account for ~90% of global table grape production**, with a **0-1% year-on-year increase expected in MY25P**.
- **Key Drivers:** China, India, and Egypt (~63% of global table grapes production) will drive the growth with a 1-5% increase, while countries with ~14% share will remain stable and those with ~12% share in total production is likely to decline by 16-20%.
- **EU Production:** EU grape production is forecast to drop 17% in MY25P, driven by extreme weather conditions, including temperature fluctuations and heavy rain in Italy, as well as drought in Greece during the summer harvest.

Grape supply forecast for MY2025P – Insights from leading producers (table grapes)

Country	Area	Yield	Production	% share of production	Key insights
China	High	High	High	47%	Production is projected to increase marginally led by higher area and stable yield. This is driven by government subsidies for agricultural expansion and improved irrigation techniques in major grape-growing regions like Xinjiang, where water management has stabilized yields despite arid conditions.
India	High	High	High	10%	Grape production is expected to increase in MY25P due to favorable monsoon patterns, modern farming practices, and export demand, particularly in MH. However, excessive rainfall in the July and August may lead to disease pressure and impact yields.
Turkey	Slightly higher	Low	Low	8%	Turkey’s grape crop declined for last three consecutive years due to late frosts. The impact of frost has also been reported this year. A decline in production by ~19% is expected in MY25P.
Uzbekistan	Slightly higher	Slightly lower	Stable	6%	Production for MY25 is expected to be stable, though yields may be slightly lower due to weather variability. Exports are projected to increase sharply, rebounding from the low levels seen in MY24.
Egypt	Slightly higher	Stable	Slightly higher	5%	Egypt table grape production is projected to be marginally higher on year with stable yields and marginal increase in acreages. Adoption of new varieties has led to improve in production and quality.
Brazil	High	Slightly Lower	Stable	5%	Despite a slight increase in area under cultivation in CY25, grape production remained stable due to lower yields caused by climate variability. For the upcoming season in Brazil, yields are expected to recover as La-Nina condition is likely to be neutral.
EU	Stable	Low	Low	5%	EU production has been declining for the past two years and is projected to further drop by another 17% in MY25. Key factors include extreme weather, high input and labor costs, labor shortages, and competition from cheaper imports. Low profitability have also pushed growers to exit or switch crops.
US	High	High	High	3%	U.S. production in MY24 saw a sharp 10% Y-O-Y decline, mainly due to adverse weather impacting yields. In MY25, yields are expected to return to normal levels , with overall production likely to rebound by 7–8% Y-O-Y.

Export Challenges and Opportunities

Monsoon impact in India

- The early monsoon arrival in India may impact late-season crop arrivals but is expected to boost yields for the upcoming season. With favorable rainfall, strong demand, and higher prices, production is projected to rise 5-10%.
- However, the incessant rainfall in the month of July and August, is expected to increase the disease pressure for diseases like downy mildew, which is expected to impact the yield and lower the production
- China's export barrier on water-soluble fertilizers may impact production and increase costs.

Export Opportunities To Croatia

- Croatia offers a significant export opportunity for grapes, as it imports over 11 times more than it produces domestically.
- The country currently relies on imports from Italy, the Netherlands, and Moldova, among others, with a focus on Italian red grapes and Turkish seedless varieties.
- Indian varieties such as Thompson seedless, Flame seedless, Sonaka seedless could be the varieties through which Indian exporter could cater the Croatian market

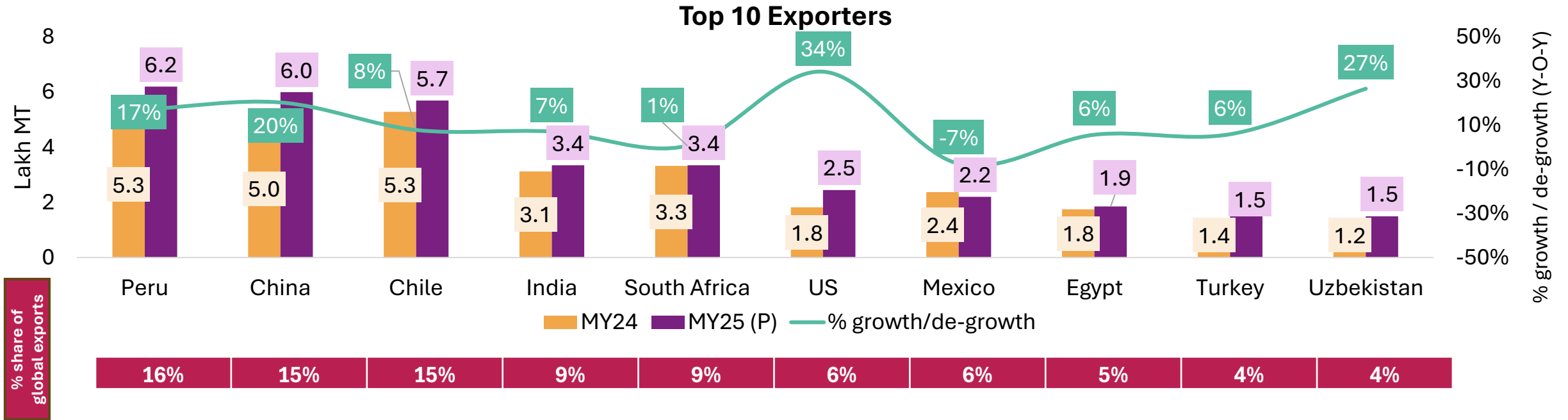
Export Opportunities to Turkey

- Turkey's grape production is expected to be severely hit by two consecutive frosts in April 2025. This creates an opportunity for Indian exporters to fill the gap, particularly in markets like Russia, Ukraine, and the EU. Indian varieties like Thompson seedless and Flame seedless are similar to those produced in Turkey.



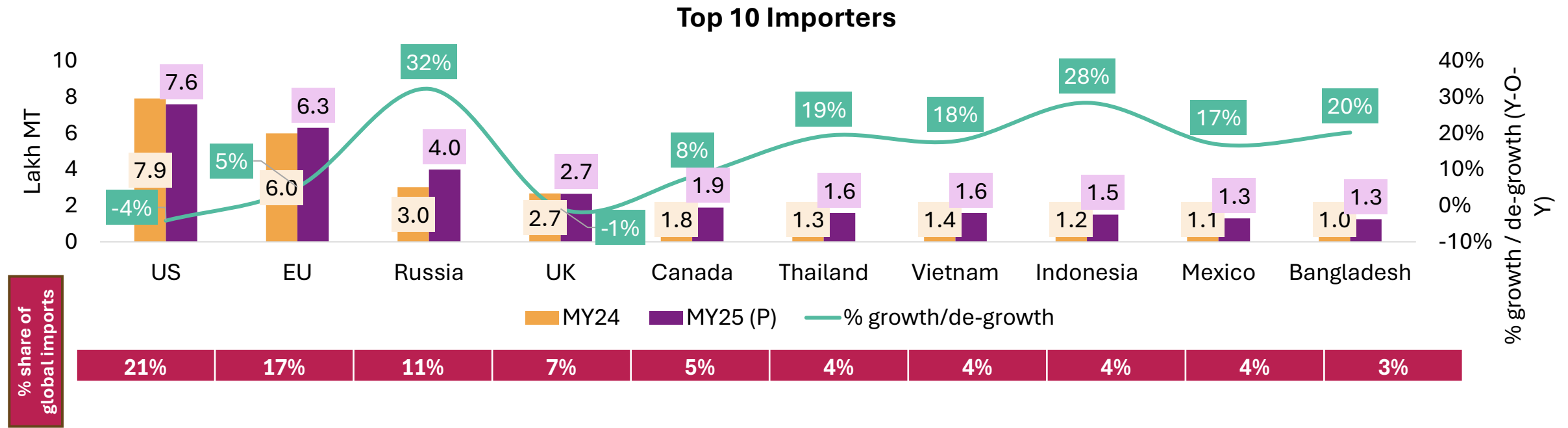
Export trends and price outlook

Major exporters of Grapes



- The countries shown in the chart collectively account for ~88% of global table grape exports.
- Global table grape exports in MY25 are projected to rise by around 10% year-on-year, primarily fueled by a significant increase in export volumes of US, Uzbekistan, China and Peru. These countries exports are projected to grow by 20-34% on year.
- This surge mainly driven by significant increase in imports from Russia, Southeast Asian countries, Mexico and Bangladesh.
- Favorable weather conditions in Brazil in the 1st quarter, remains supportive for grapes yields and quality, potentially boosting the value of Brazilian grapes during the main export season.

Major importers of Grapes



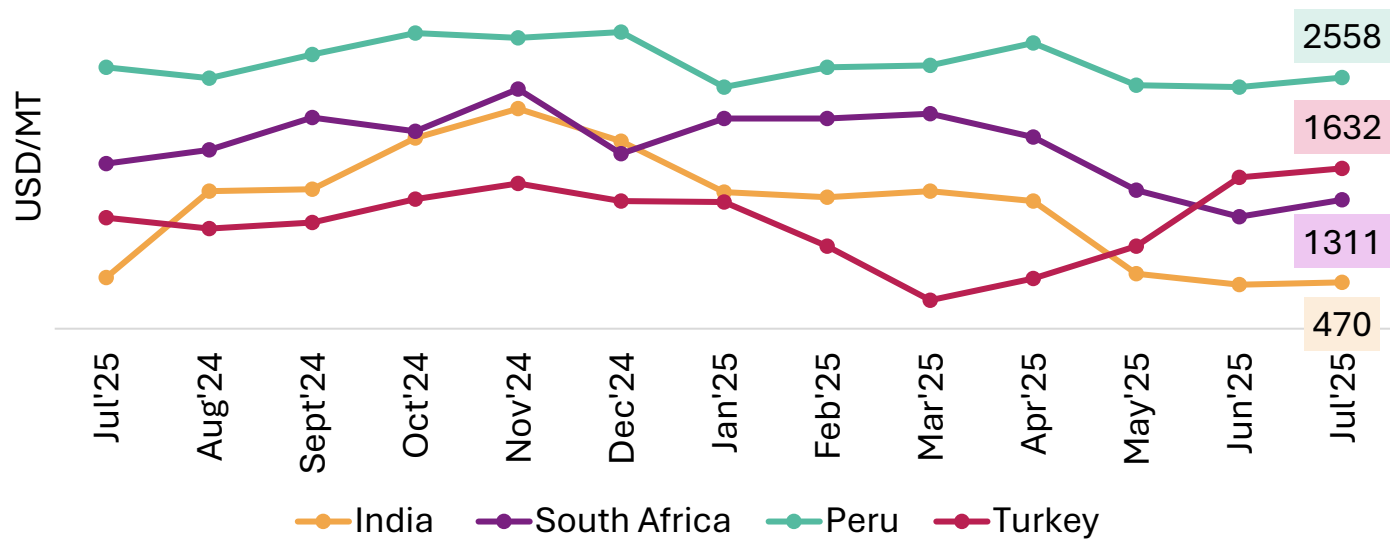
- The countries in the chart account for ~80% of global table grape imports.
- From MY20 to MY25, grape imports grew at a range of 7-10% CAGR in Southeast Asia (Philippines, Indonesia, Vietnam, Malaysia), 16% in Bangladesh, 7% in Russia, and 5% in the EU.
- Southeast Asia, a net importer of fresh produce, makes up 4% of global fresh produce imports. Fruit imports have grown ~20% annually over the past three years, with grapes among the top imported fruits in the SEA region.
- Malaysia to impose a 5% sales tax on all imported fruits from July 1, 2025, aiming to boost local produce consumption and enhance food security.

Note: P – Projected value; MY – Marketing year (Jun-May)

Source: USDA

Export prices forecast for grapes – Fundamental analysis

Grapes export prices

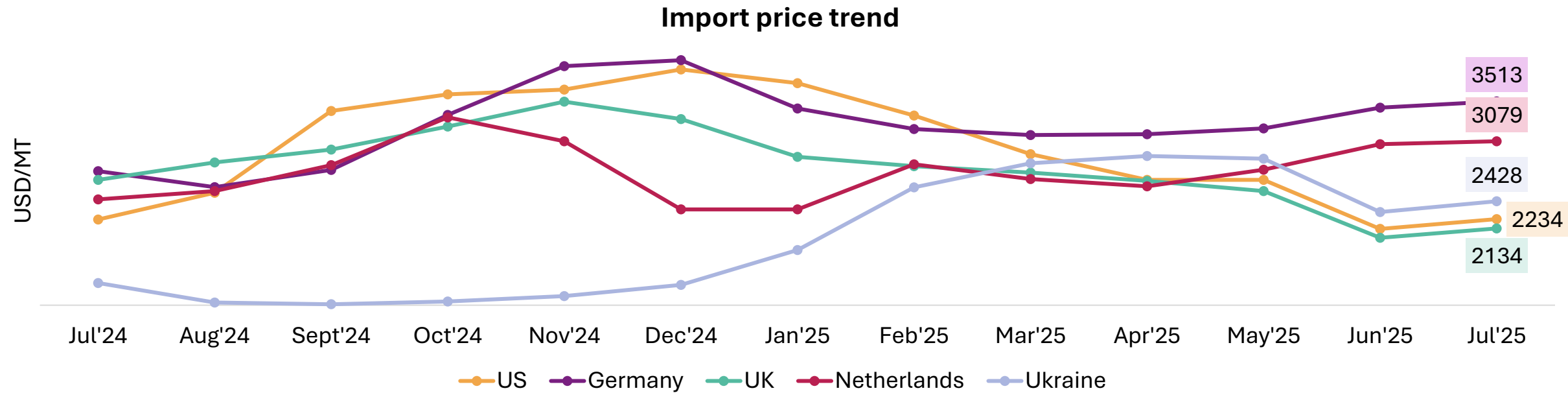


Product	Jul'25 Price (USD/MT)	Jul'24 Price (USD/MT)	%age change	Indicative price change direction	Forecasted average price range for ASO (USD/MT)
India	470	520	10%	Bullish	600-700
South Africa	1311	1680	22%	Bullish	1300-1400
Peru	2558	2660	4%	Bullish	2700-2800
Turkey	1632	1130	44%	Bullish	1800-1900

- Indian table grape export prices are expected to stay high next quarter due to the off-season. Domestic prices in India have hit a record high of Rs. 8,000 per quintal in July '25. Despite a drop in FY25 exports, strong local demand is keeping prices elevated.
- In South Africa and Peru, the peak harvest season (January-March) has ended. Peru is expected to witness a 17% increase in MY25P exports, while South Africa's exports rose slightly by 1-2% year-on-year. Prices for both countries are likely to inch up in the next quarter as the lean season begins.
- Turkey's grape harvest is scheduled to begin next month, but the impact of frost damage is already being felt, with prices surging since April 2025. Prices are expected to rise further in the next quarter as the full extent of the crop damage becomes clear with the start of harvesting, and export demand peaks.

Source: Crisil Intelligence (includes findings from primary interactions) & ITC trade map
Note: ASO stand for August, September and October

Price trends of key importing nations



- US grape imports are expected to drop 4% in MY25P due to a 7% surge in domestic production. Meanwhile, US grape exports are forecast to jump 30% in MY25P, recovering from a low base the previous year. Additionally, with key exporters Peru and Chile entering their lean season, prices have started to rise since Jul’25.
- Grape imports by the EU are projected to increase by 5–6% year-on-year in MY25P, despite already being on a high base. This growth is mainly driven by a decline in domestic grape acreage and production.
- UK grape imports are expected to decline slightly by around 1% in MY25P. This modest drop comes after a high import volume in the previous year.
- Ukraine’s grape imports are projected to fall by 2–3% in MY25P. The decline is relatively marginal and linked to improved domestic harvest conditions and economic factors impacting import purchasing capacity.

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



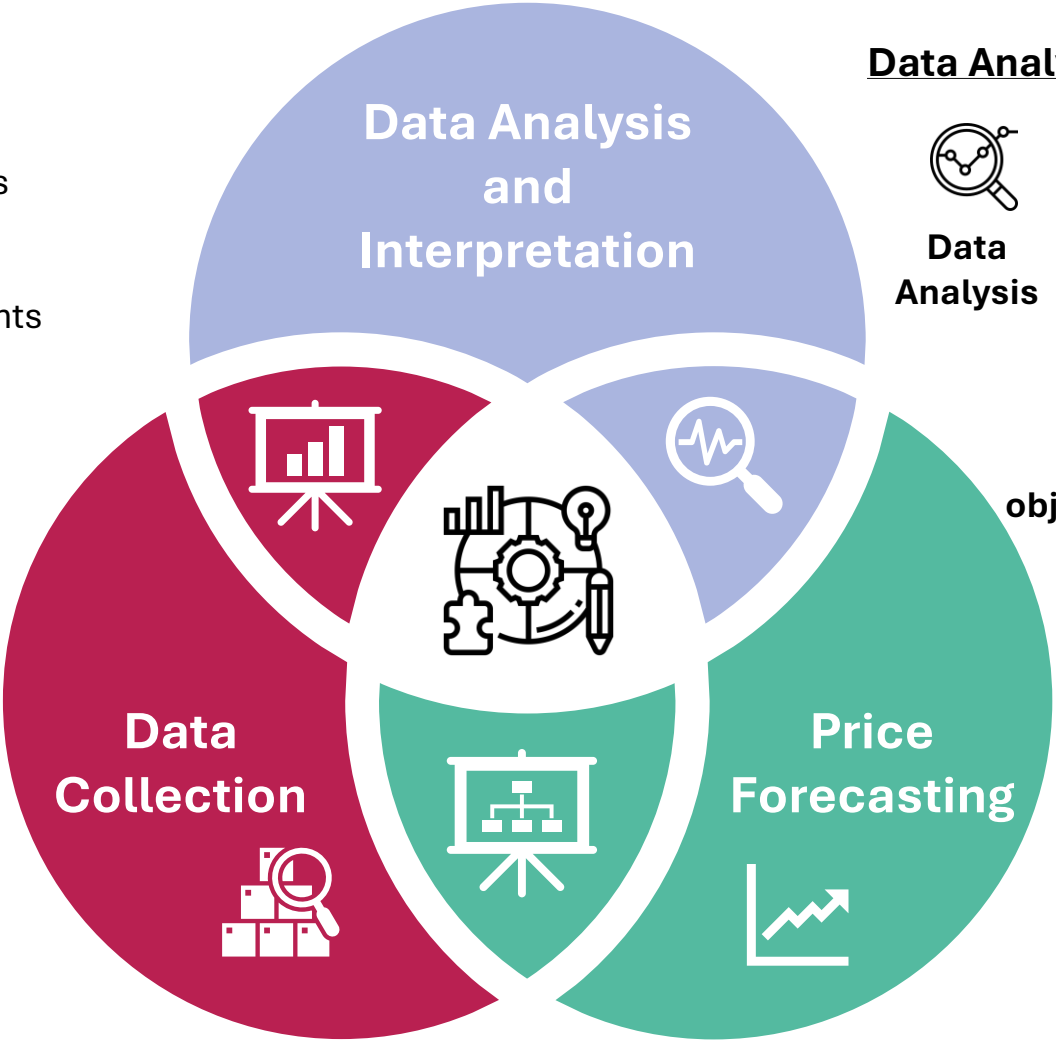
Sources

- 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.