

Monthly dashboard – Grapes

Aug 2025



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												

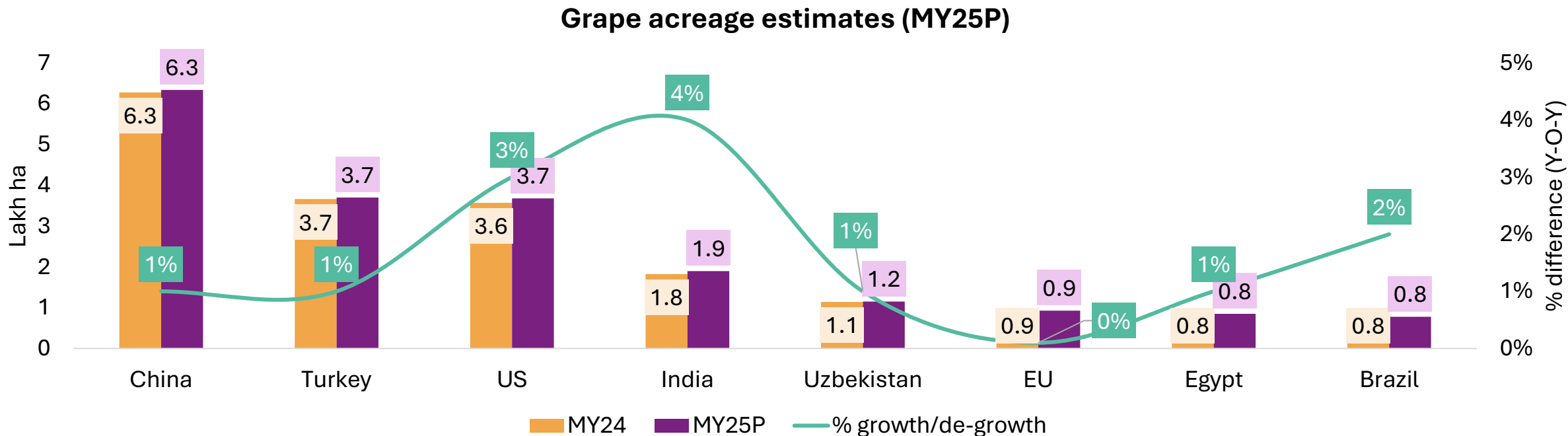
Lean season

Peak season

- The grape 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.

Marketing year for grapes is considered as Calendar year, Jan-Dec.
MY25P refers to the current harvesting season and estimates for grapes in major producing countries during Jan’25 to Dec’25.

Acreage estimates of major producing countries

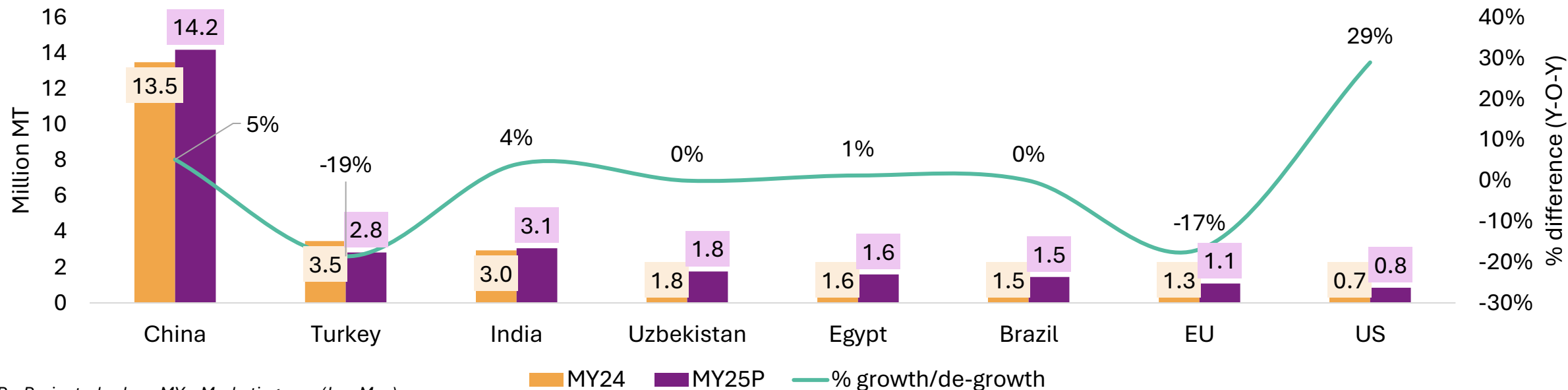


P – Projected value; MY – Marketing year (Jun-May)

- 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 global production	Key insights
China	High 	High 	High 	47%	Production is projected to increase marginally led by higher area and high yield. 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%	India's grape production is expected to increase in MY26P due to favorable monsoon patterns and strong export demand. However, heavy July and August rains may lead to certain disease infestation and lower yields. The harvest is also expected to be delayed by 1-2 weeks due to delay in pruning in Maharashtra led by recent heavy rains.
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 MY25P 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 like Sweet Globe (white), Starlight, Melody, Sweet Celebration, to name a few has led to improve in production and quality.
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 Egypt and Turkey.
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 is **expected to boost yields** for the MY26P. 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** as downy mildew, which may **impact the yield and lower the production**.
- The **training and pruning of the grapes has been delayed across Nashik, Pune and Sangli** district of Maharashtra which is expected to delay the harvest. While the crop is reported to be on-time across Bijapur, Gulbarga, Raichur, Bellary districts of Karnataka.

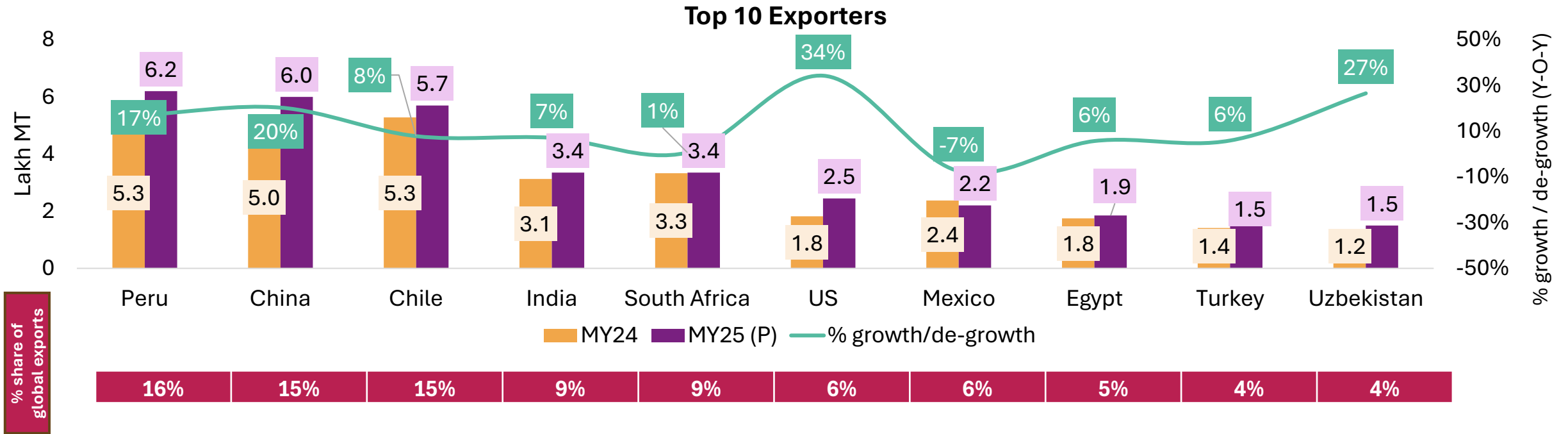
Export Opportunities To Croatia

- 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.
- Although the harvest season in these countries takes place from August to October, which does not overlap with India's export period (February to June), **Indian prices remain competitive as major suppliers are in their off-season**.
- Indian varieties such as Thompson seedless, Flame seedless, Sonaka seedless could be the varieties through which Indian exporter could cater the Croatian market



Export trends and price outlook

Major exporters of Grapes

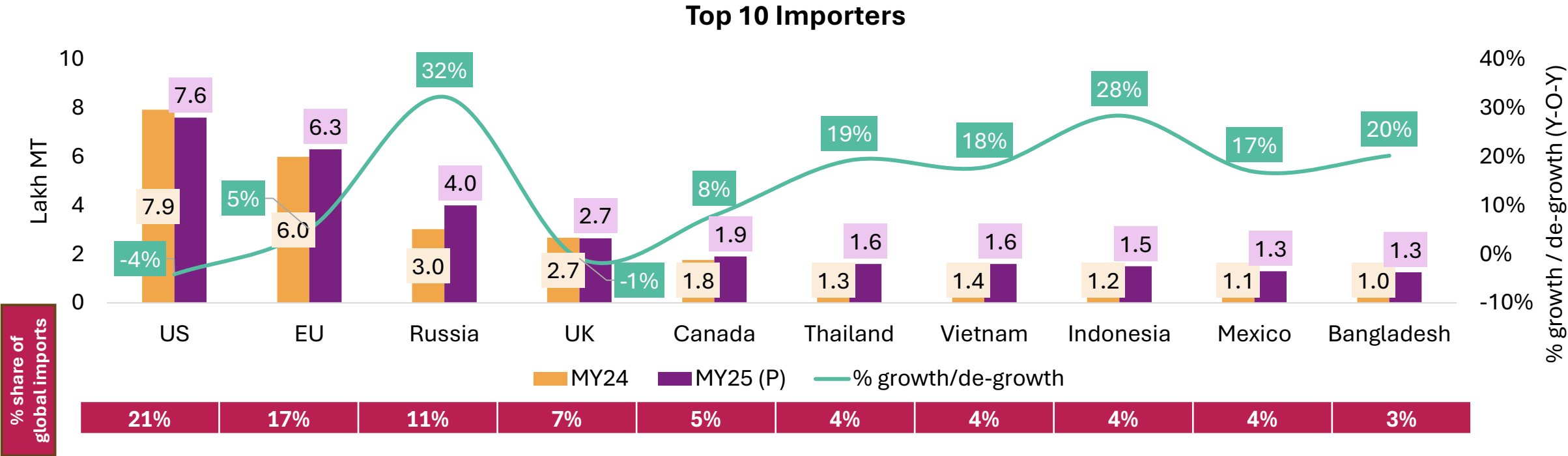


- The countries shown in the chart **collectively account for ~88% of global table grape exports.**
- Global table **grape exports in MY25P are projected to rise by around 10% year-on-year**, primarily fueled by a significant increase in export volumes of US, Uzbekistan, China and Peru, these countries exports are projected to grow by 17-34% on year.
- This surge mainly driven by **significant increase in imports from Russia, Southeast Asian countries, Mexico and Bangladesh.**
- Increased grape production in Chile, coupled with reduced demand from Southeast Asia and other Asian markets—driven by cheaper imports from China—is expected to compress exporters' profit margins and intensify competition in other markets due to downward pressure on prices.

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

Source: USDA

Major importers of Grapes

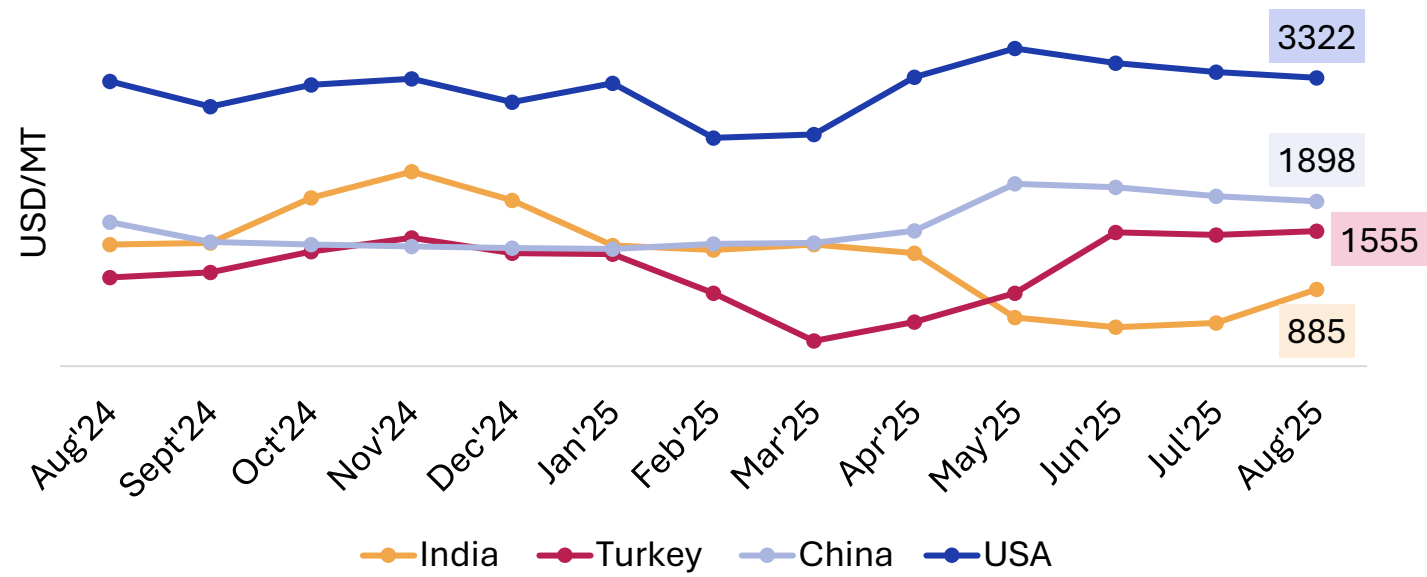


- The countries in **the chart account for ~80% of global table grape imports.**
- From MY20 to MY25, **grape imports grew at a range of 7-10% CAGR in Southeast Asia** (Philippines, Indonesia, Vietnam, Malaysia), 16% in Bangladesh, 7% in Russia, and 5% in the EU.
- Southeast Asia, a net importer of fresh 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 imposed 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

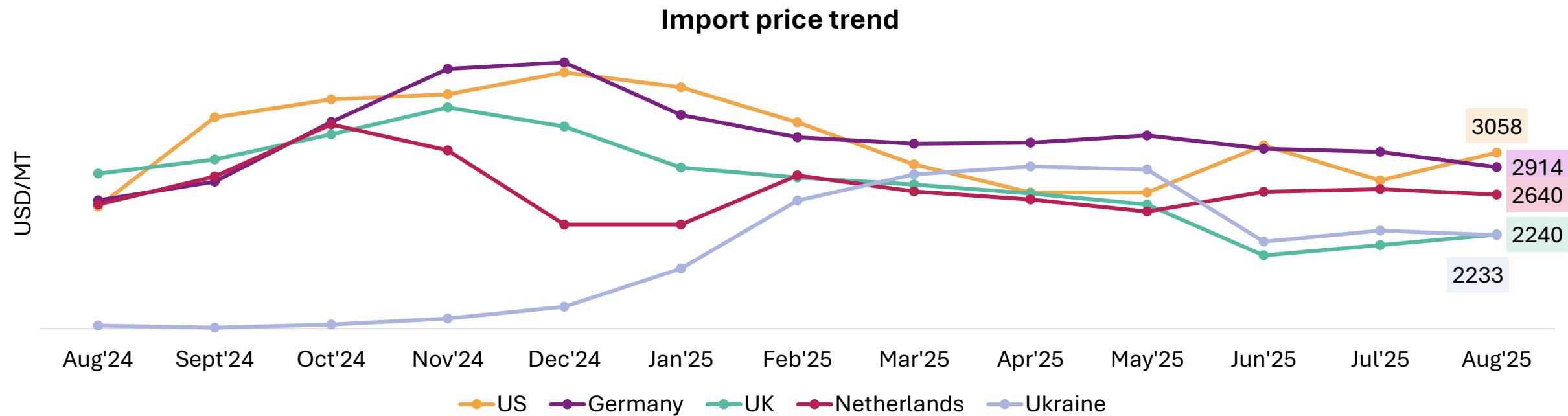


Product	Aug'25 Price (USD/MT)	Aug'24 Price (USD/MT)	%age change	Indicative price change direction	Forecasted average price range for SON (USD/MT)
India	885	1,400	-37%	Bullish	1,050-1,250
China	1,898	1,660	14%	Bearish	1,650-1,850
USA	3,322	3,280	1%	Bearish	3,050-3,250
Turkey	1,555	1,020	52%	Bullish	1,550-1,750

- Indian table grape export prices are expected to stay high next quarter due to the off-season. Despite a drop in FY25 exports, strong local demand is keeping prices elevated.
- Export prices for China and the USA have been decreasing since May 2025, driven by 5% and 29% increase in production, respectively, as well as the start of new harvest arrivals in July 2025. It is expected that prices will continue to decline in next quarter as the full harvest enters the market.
- 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 reported to have remained flat with the beginning of the fresh arrivals while the export demand is, yet to witness the peak. The prices is expected to rise further in the next quarter as the full extent of the crop damage becomes clear and export demand peaks.

Source: Crisil Intelligence (includes findings from primary interactions) & ITC trade map
Note:1)SON stand for September October and November 2)India is currently in the lean season, however, the prices are kept for the comparison purpose

Price trends of key importing nations



- **US grape imports are projected to decrease by 4% in MY25P** due to a substantial 29% growth in domestic production. Conversely, exports are expected to surge by around 30%. The start of Peru and Chile's lean season in July 2025 led to a price increase, although an initial influx of Mexican exports temporarily pushed prices down before they rebounded in August.
- **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. **Prices in Germany and Netherlands eased in August 2025 as exports from Italy and Egypt started to arrive.**
- **UK grape imports are forecast to experience a minor decline of ~1%** in the 2024/2025 marketing year, following a particularly high volume of imports in the previous year. In August 2025, UK grape prices saw an uptick due to a decrease in affordable imports from Chile, which was entering its lean season and subsequently reducing its supply.
- **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



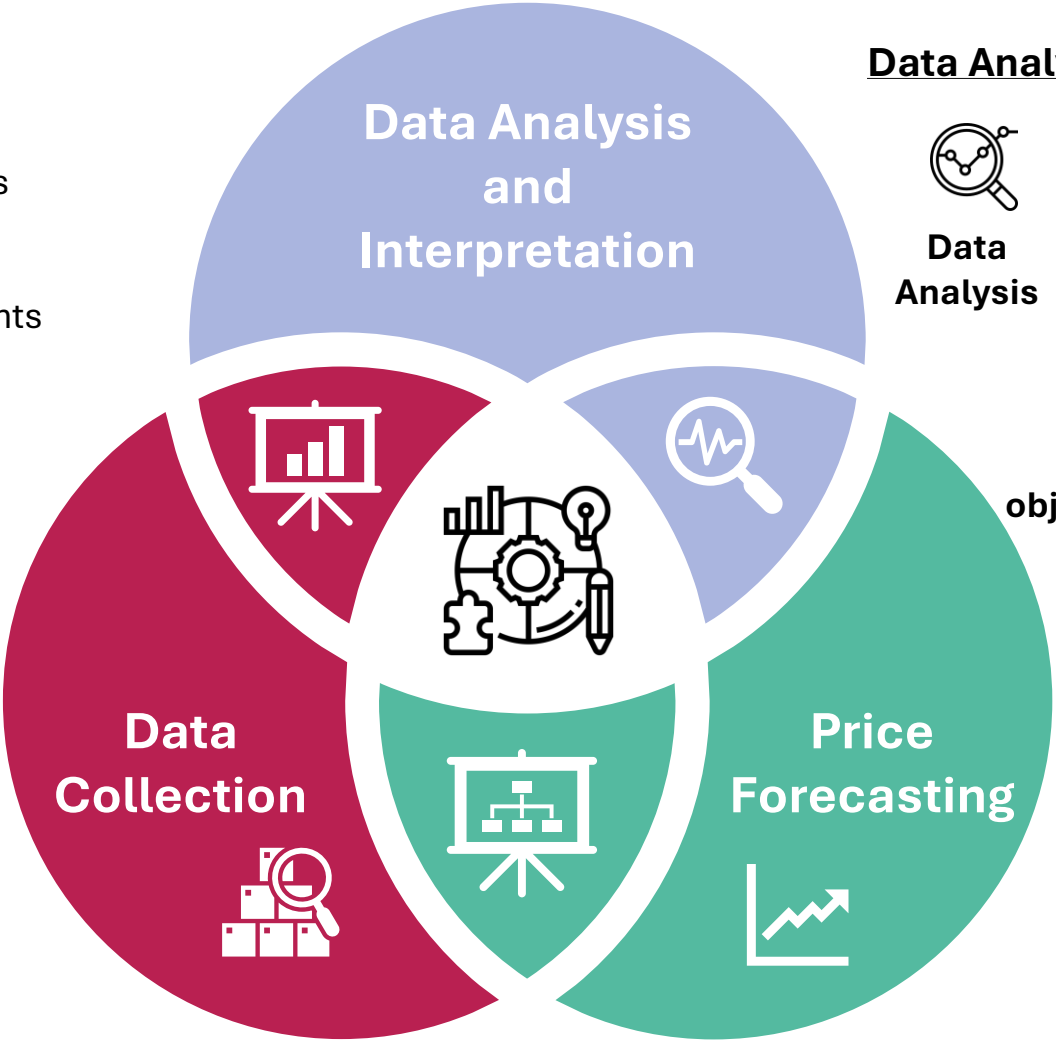
Sources

- 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.