Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Grapes

Nov-2025

Acreage and production trends

Grapes crop calendar of major producing countries (Table grapes)

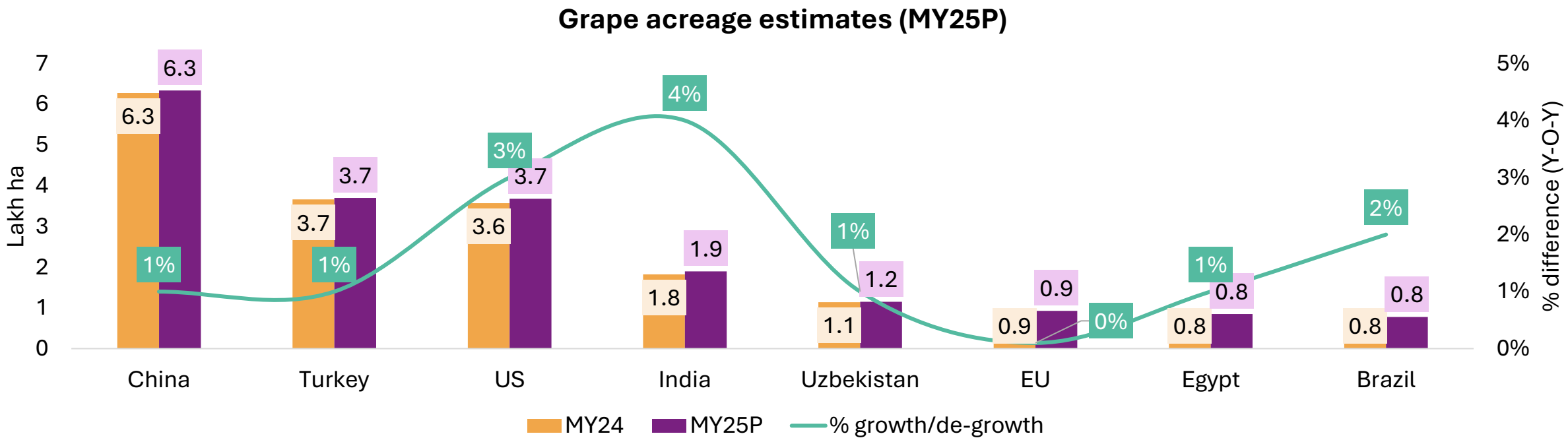
Countries	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China												
India												
Turkey												
Uzbekistan												
Egypt												
Brazil												
EU												
US												

Lean season | Peak season

- The grape 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.
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

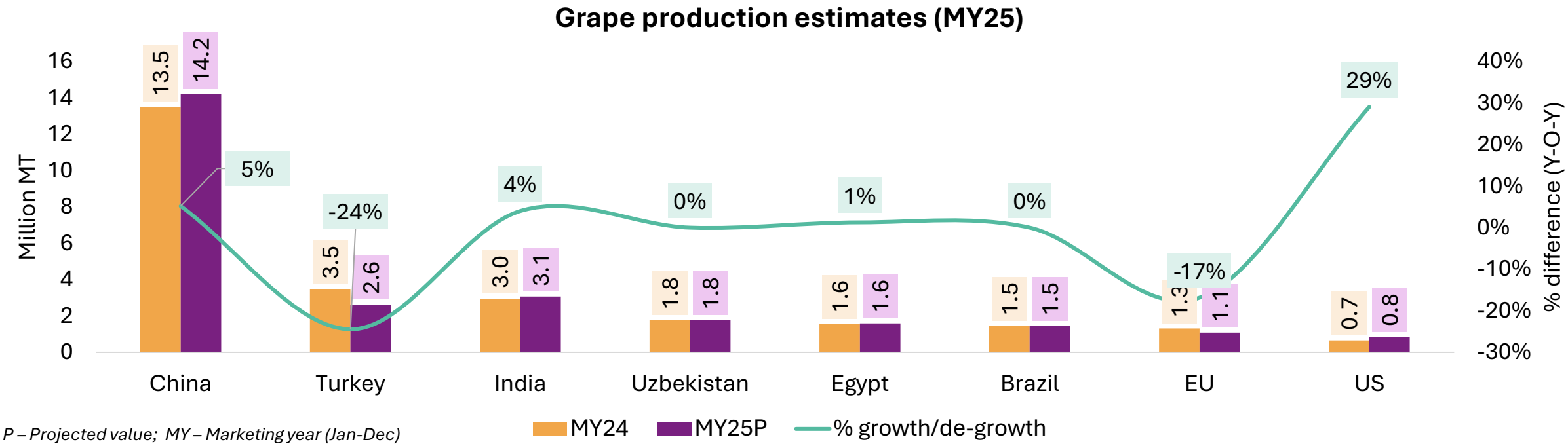


P – Projected value; MY – Marketing year (Jan-Dec)

- 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 acreages are estimated to have witnessed a further expansion in MY25**, driven by favorable climatic conditions and strong price realization.

Source: USDA

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 increase expected in MY25P.
- China and Egypt, which together produce about **60% of global table grapes**, will drive growth with a 1–5% increase, while production for other key producers are expected to grow in a range of 12-20% on year.
- **Turkey Production: Turkey's grape production is projected to decline by about 25%** in MY25 due to severe spring frost, erratic winter temperatures, and subsequent heat stress, which disrupted flowering, reduced fruit set, and significantly lowered yields.
- **US Production:** U.S. grape production **is expected to increase in MY25P,** supported by normalizing yields in California (which accounts for ~90% of national output). Improved cluster setting, better berry size, and reduced disease incidence compared to MY24—a year marked by heat stress and storm damage—are driving the anticipated production recovery.

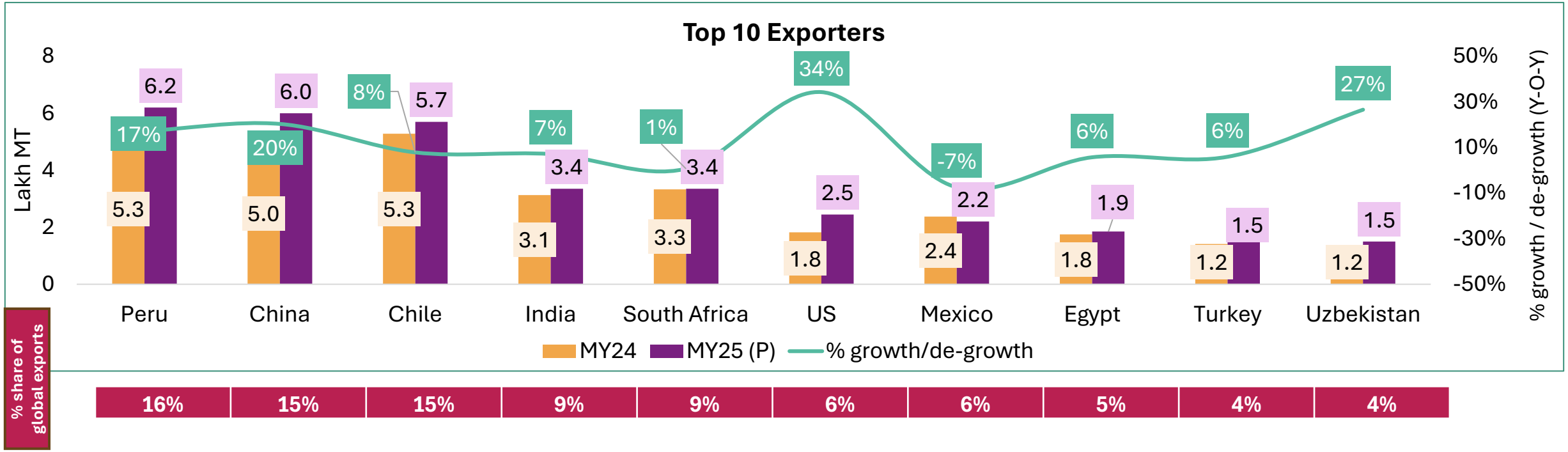
Source: USDA, Turk Stat

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, driven by higher acreage and improved yields. This growth is supported by government subsidies for agricultural expansion and enhanced irrigation techniques in major grape-growing regions like Xinjiang, where effective water management has stabilized yields despite arid conditions.
India	High ↑	Low ↓	Low ↓	**10%**	India's grape production is expected to decline in MY26P due to unfavorable monsoon patterns, which have led to increased disease infestation across Karnataka and Maharashtra. Additionally, delayed pruning in Maharashtra has resulted in lower yields and a drop in overall production.
Turkey	Slightly higher	Low ↓	Low ↓	**8%**	Turkey's grape crop has declined for the past three consecutive years due to late frosts, with frost impact also reported this year. A production decline of approximately 25% is expected in MY25P.
Uzbekistan	Slightly higher	Slightly lower	Stable	**6%**	Production for MY25P is expected to remain stable, although yields may be slightly lower due to weather variability. However, exports are projected to increase sharply, rebounding from the low levels seen in MY24.
Egypt	Slightly higher	Stable	Slightly higher	**5%**	Egypt's table grape production is projected to be marginally higher year-on-year, supported by stable yields and a slight increase in acreage. 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	Low ↓	Low ↓	**5%**	EU table grape production has been declining for the past two years and is projected to drop by another 17% in MY25. Key factors include extreme weather, high input and labor costs, labor shortages, and competition from cheaper imports from 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 MY25P, yields are expected to return to normal levels , with overall production likely to rebound by 28–29% Y-O-Y.

Export trends and price outlook

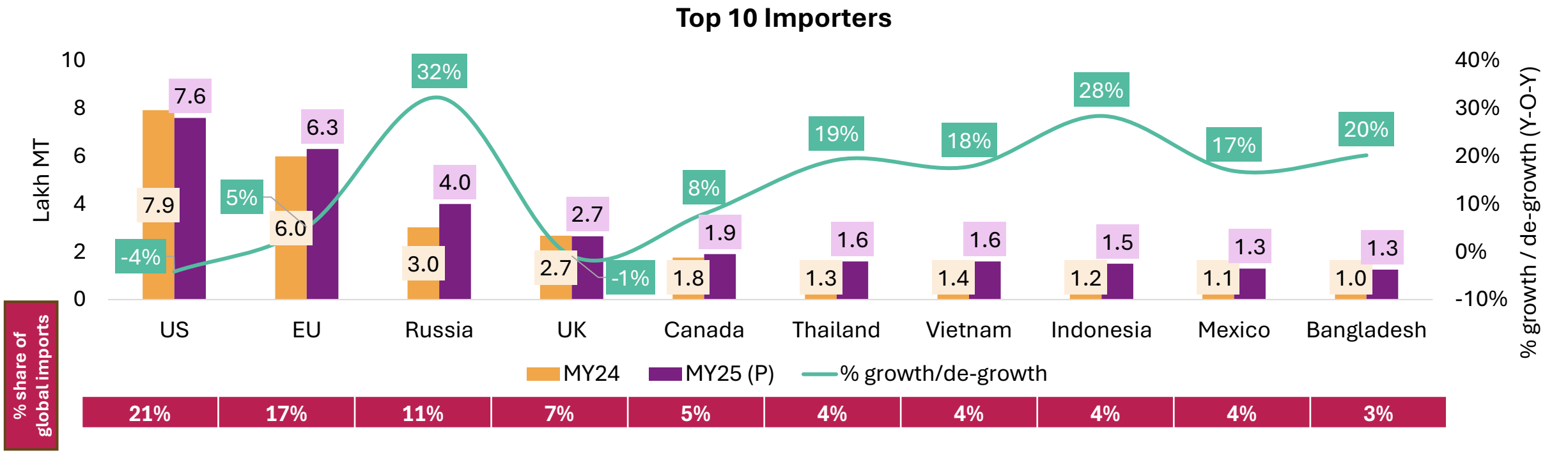
Major exporters of Grapes



- The countries shown in the chart collectively account for approximately 88% of global table grape exports.
- **Global table grape exports in MY25P are projected to rise by around 10% year-on-year**, primarily driven by significant increases in export volumes from the US, Uzbekistan, China, and Peru, with these countries expected to see export growth of 17–34% year-on-year. This surge is mainly due to increased imports from Russia, Southeast Asian countries, Mexico, and Bangladesh.
- **South Africa's 2025–26 grape export campaign is projected at approximately 3.57 lakh MT**, **up by about 1%** from the previous season. This modest growth is attributed to favorable weather in key producing regions and ongoing logistical improvements, while first-time market access to the Philippines is expected to aid export diversification and support incremental demand.

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

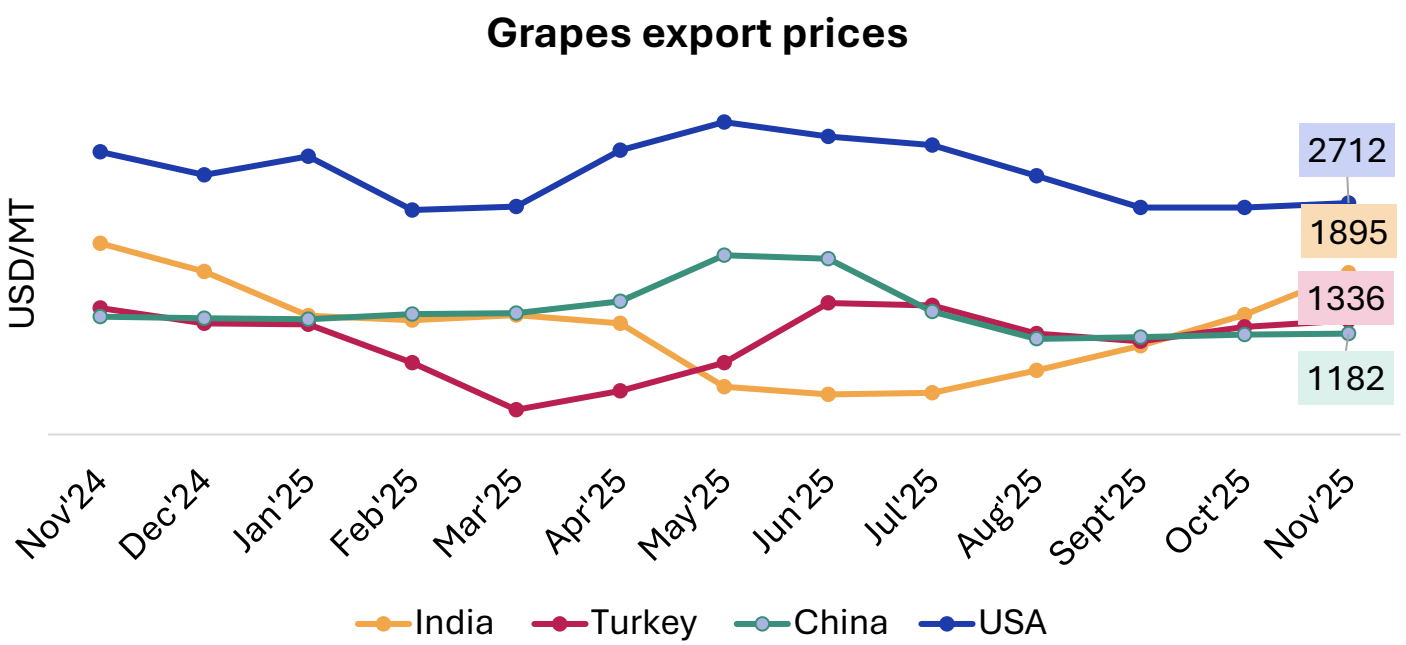
Major importers of Grapes



- The countries in the chart **account for approximately 80% of global table grape imports**. From MY20 to MY25, grape imports grew at a CAGR of 7–10% 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, 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.
- **In Vietnam, fruit imports reached USD 1.91 billion in the first nine months of 2025**, up 15.1% year-on-year, with premium supplies from the US surging by around 47%. Strong demand for high-value fruits, including table grapes, suggests that Vietnam's grape imports are set to increase further in the coming months.

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

Export prices forecast for grapes – Fundamental analysis



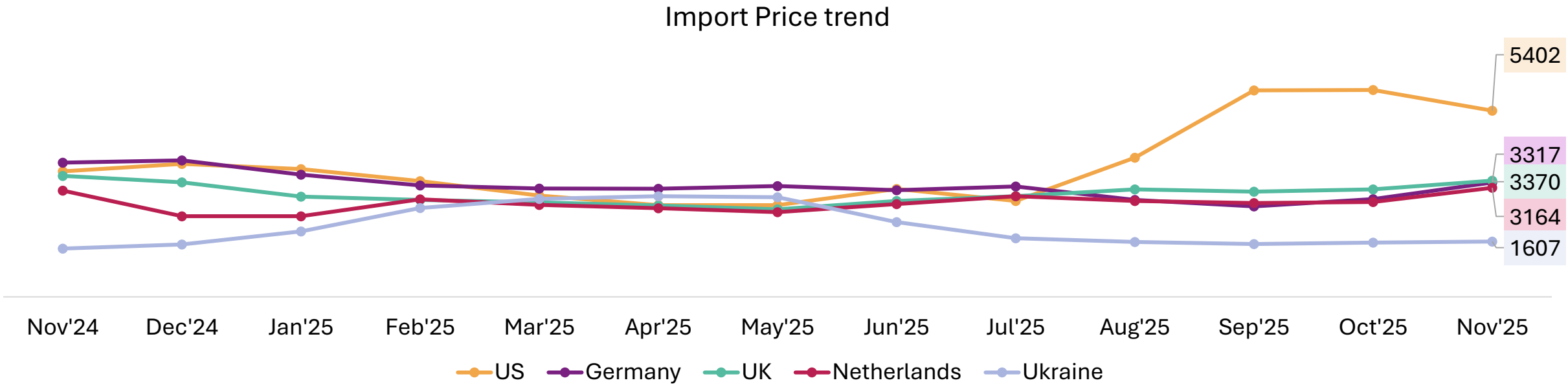
Product	Nov'25 Price (USD/MT)	Nov'24 Price (USD/MT)	%age change	Indicative price change direction	Forecasted average price range for DJF (USD/MT)
India	1,895	2.240	**-15%**	**Bearish**	1,650-1,750
Turkey	1,336	1,480	**-10%**	**Bearish**	1,250-1,350
China	1,182	1,380	**-14%**	**Bullish**	1,200-1,300
USA	2,712	3,310	**-18%**	**Bullish**	3,100-3,200

- **Indian table grape export prices are high at around USD 1,900 per ton, driven by a 20–25% production drop** due to early monsoon and tight supply. Prices remain elevated during the lean period but are **expected to ease once** fresh harvests arrive from February.
- **Export prices for China and the USA** have been decreasing since May 2025, reflecting a 5% and 29% increase in production, respectively, and the start of new harvests in July 2025. **Prices are expected to rise in the next quarter as the lean season begins**.
- **Turkey's** grape harvest has ended, with production expected to **drop 20–25%** due to **frost** and **erratic winter temperatures**. Prices rose until June but have declined since August as **lower yields** became evident and are expected to **remain soft** next quarter.
- Although prices for grapes in **USA** increased slightly with the initial fresh arrivals and growing export demand, they are expected to rise further in the next quarter as arrivals slow and sustained export demand continues to support prices.

Source: Crisil Intelligence (includes findings from primary interactions) & ITC trade map

Note:1)DJF stand for December, January, and February 2)India is currently in the lean season, however, the prices are kept for the comparison purpose

Price trends of key importing nations



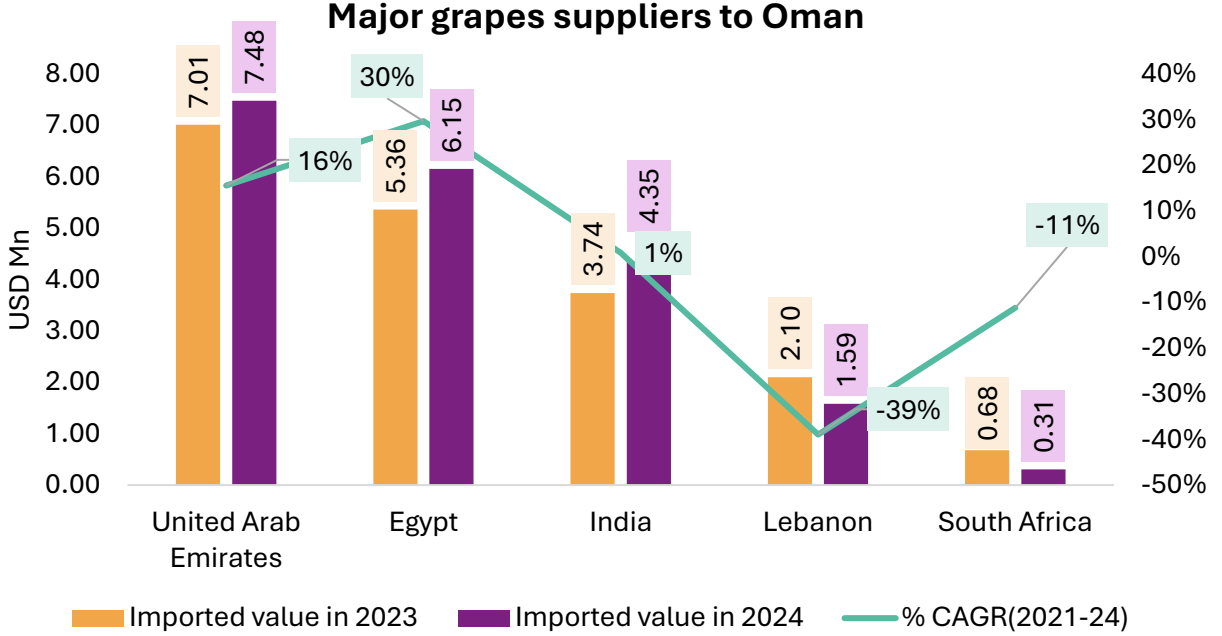
- **US grape imports are forecast to drop by 6–7% in MY25P**, driven by a 29% increase in domestic production. Meanwhile, exports are expected to jump 30%. The market saw a price surge in July 2025 with the start of the lean season in Peru and Chile, followed by a brief dip with Mexican exports. Prices rebounded in September due to higher export prices from Brazil and Korea during their peak season, before easing again in November.
- **The EU's grape imports are expected to rise by 6–7% year-on-year in MY25P**, building on a strong base. This growth is mainly due to a decline in domestic production from reduced acreage. After prices eased in October 2025, driven by arrivals from Italy and Egypt (especially in Germany and the Netherlands), prices have since marginally improved as global export demand has picked up for key supplier countries.
- **UK grape imports are expected to rise by about 1% in MY25P**, following a record high last year. In November 2025, UK grape prices increased as Spain prioritized domestic demand, resulting in higher export prices.
- **Ukraine's grape imports are projected to increase by 1–2% in MY25P.** As stocks in Europe and Turkey decline during the lean period, import availability from key suppliers tightens, leading to marginal upward pressure on domestic prices.

Source: Crisil Intelligence (includes findings from primary interactions) & ITC trade map

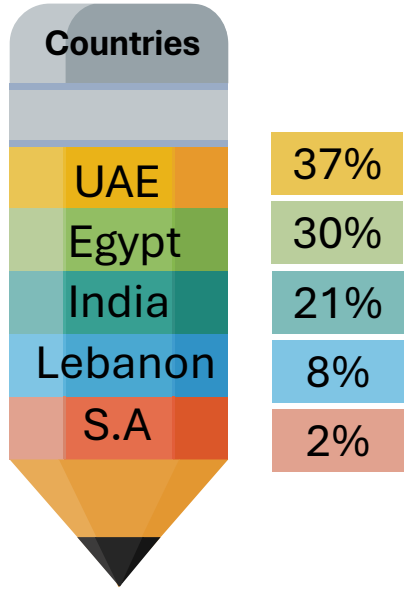
Indian Export Opportunity in Oman

- India and Oman signed a Comprehensive Economic Partnership Agreement (CEPA) on December 18, 2025—Oman's first trade agreement in nearly 20 years—aimed at deepening bilateral trade relations.
- **Bilateral trade reached USD 10.61 billion in FY25 (+18.6% YoY),** with India exporting ~ USD 4.1 billion to Oman, although imports from Oman remain higher.
- **Nearly 83.5% of Indian exports to Oman (~ USD 3.42 billion) currently face tariffs of around 5%,** which are expected to be eliminated under the CEPA.
- The removal of tariffs is set to benefit key sectors such as textiles, chemicals, food products, and engineering goods, improving their price competitiveness in the Omani market.

Major grapes suppliers to Oman



% share of Oman's grapes import basket



- **Oman's total imports** stood at **~USD 41 billion** in **2024**, of which **imports from India** were **~USD 4 billion**, giving **India** a **10% share** in Oman's overall imports and positioning it as **Oman's 4th-largest import partner.**
- **Between 2021-24**, **Oman's total grapes imports declined** at a **CAGR** of **~1%** , while **imports** from **India grew** at **~1% CAGR.**
- **India currently ranks third in Oman's grape imports**, holding a 21% share after the UAE and Egypt, which highlights an established but expandable presence in this category.
- With the CEPA likely to reduce trade barriers, Indian exports—particularly grapes and select agricultural products—are well-positioned for growth, creating a mutually beneficial trade opportunity for both India and Oman.

Source : ITC Trade map, Crisil Intelligence
CEPA: Comprehensive Economic Partnership Agreement

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.

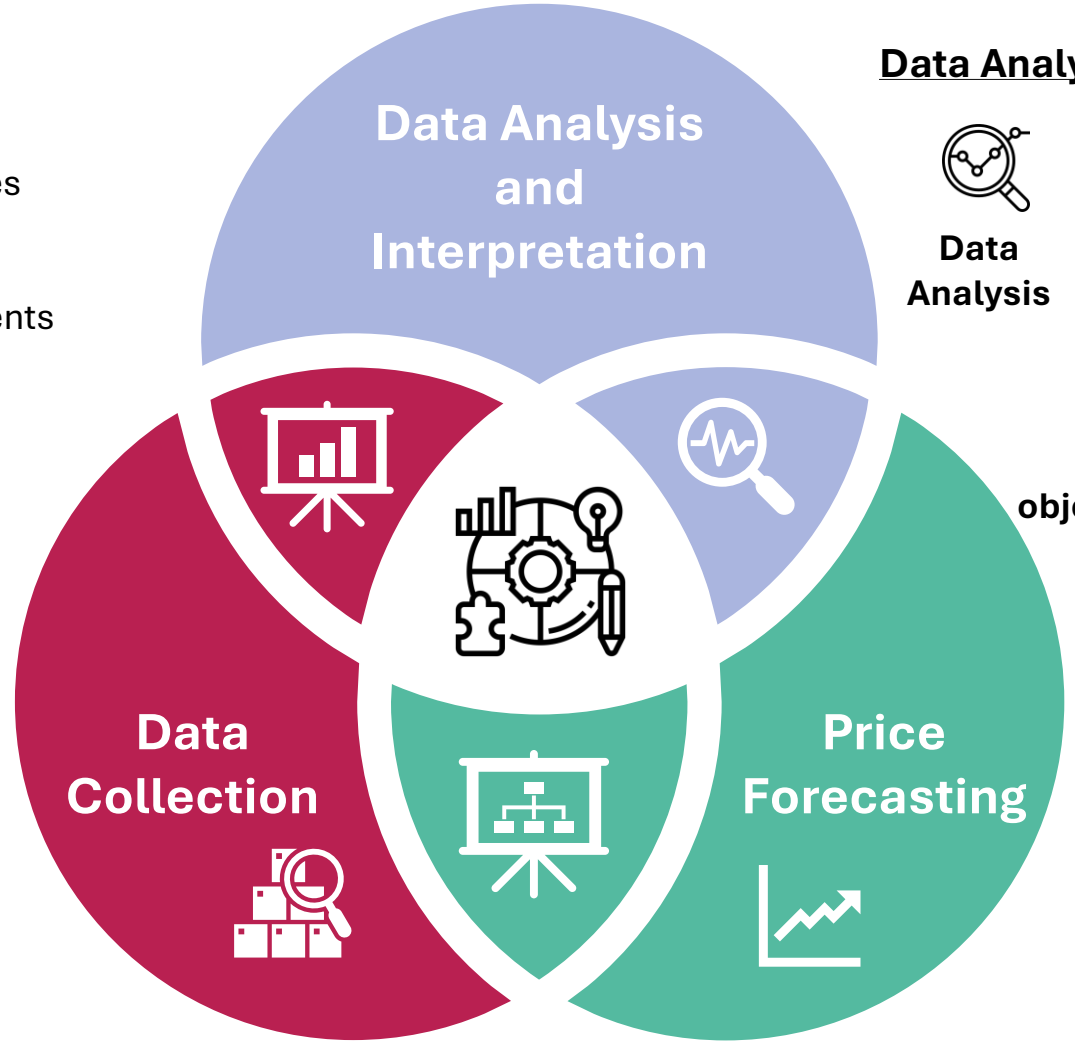
Data Collection

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.