Crisil
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एपीडा
APEDA

# Monthly dashboard – Grapes

**HS code: 080610**

## February -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 | | | | | | | Lean season | Peak season | Peak season | Peak season | Lean season | |
| India[1] | Lean season | Peak season | Peak season | Peak season | Lean season | | | | | | | |
| Brazil | Peak season | Peak season | Lean season | | Lean season | Lean season | | | | | Lean season | Peak season |
| Uzbekistan | | | | | | | Lean season | Peak season | Peak season | Peak season | Lean season | |
| Egypt | | | | | Lean season | Peak season | Peak season | Lean season | | | | |
| EU | | | | | | | Peak season | Peak season | Peak season | Peak season | | |
| Turkey | | | | | | | Lean season | Peak season | Peak season | Peak season | Lean season | |
| Peru | Peak season | Peak season | Lean season | Lean season | Lean season | | | | | | Lean season | Peak season |

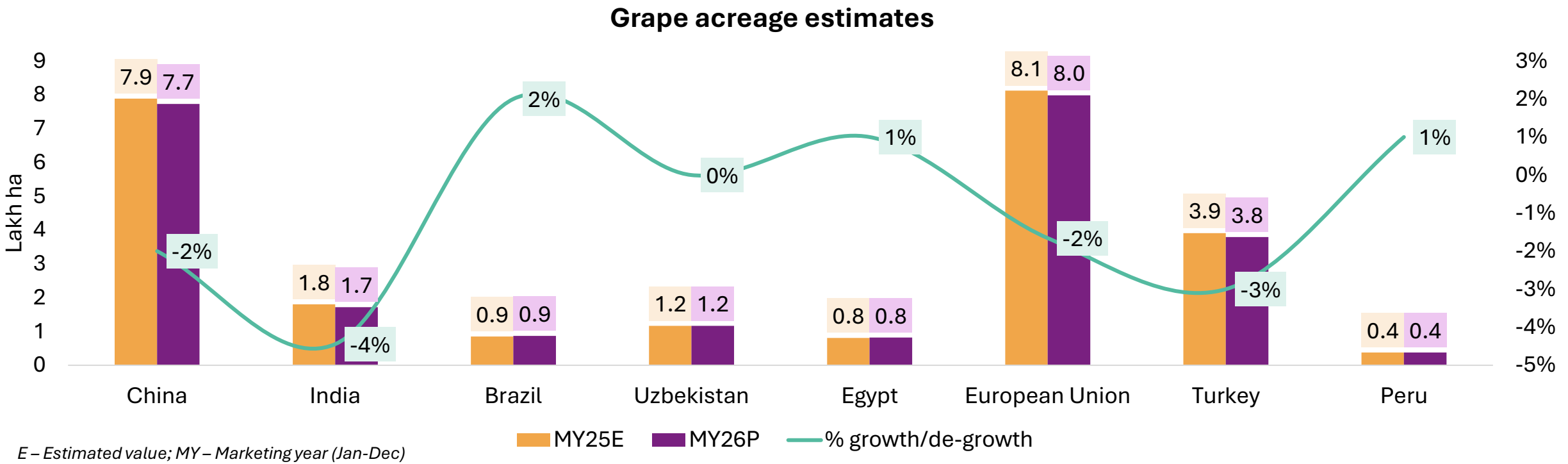
Lean season | Peak season

- The grape harvesting season for most major producing countries, including China, Turkey, and the Uzbekistan, 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.*

*Source: 1. India*

# Acreage estimates of major producing countries

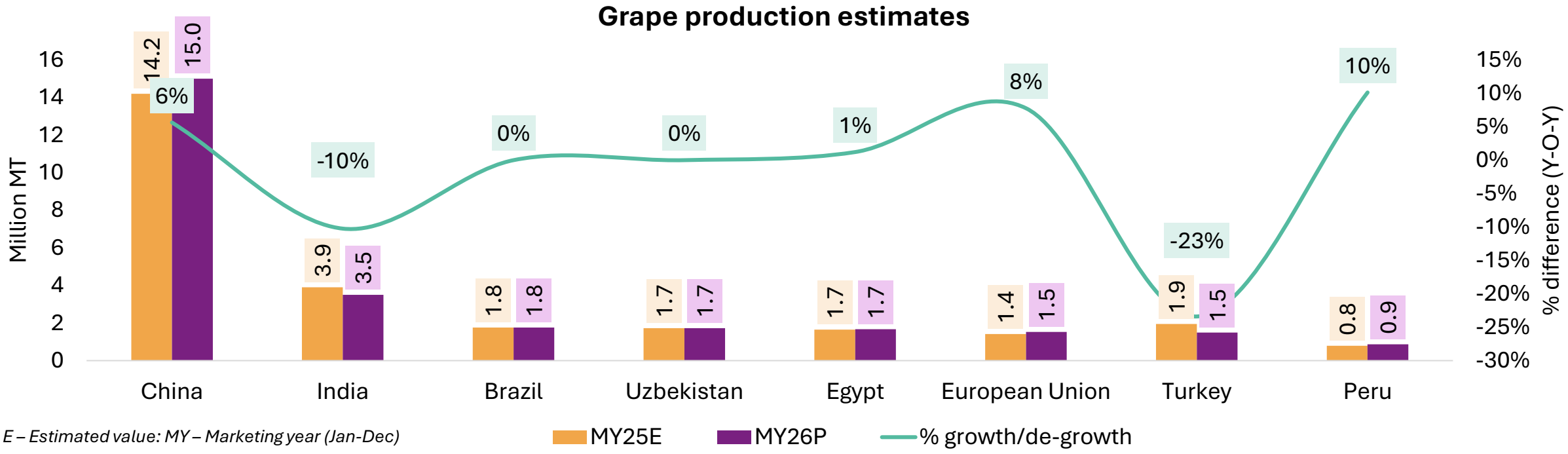



*E – Estimated value; MY – Marketing year (Jan-Dec)*

- The countries shown in chart contribute **~60% of global table grape area**. For MY26P, global acreage is set to **fall by 1-2% YoY**, led by **China, India** and **Turkey**.
- **China's grape acreage** is **set to decrease marginally in 2026**, influenced by **ongoing water shortages** in regions like **Xinjiang**, and reported shift towards **more lucrative crops**, and **declining wine demand**.
- **India's** grape acreage is **projected to decline ~4%** in **MY26** as **severe production losses** in **Maharashtra's Nashik–Sangli belt** due to **prolonged unseasonal rains**, **fungal pressure** and **pruning disruptions** prompted **vineyard removal** and **reduced new plantings.**

*Source: Acreage for MY2025E and MY2026P is based on data from USDA*
*India's acreage referred from MoA&FW and projection based on trends and interactions*

# Production estimates of major producing countries




*E – Estimated value: MY – Marketing year (Jan-Dec)*

- **Global Production:** The countries shown in the chart account for ~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%**. Additionally, **production** from other **key producers is projected** to **grow by 1–10% year-on-year except Turkey and India which shows a dip by ~23% & 10%, respectively.**
- **Turkey Production: Turkey's grape production** is **projected to decline ~23%** 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**.

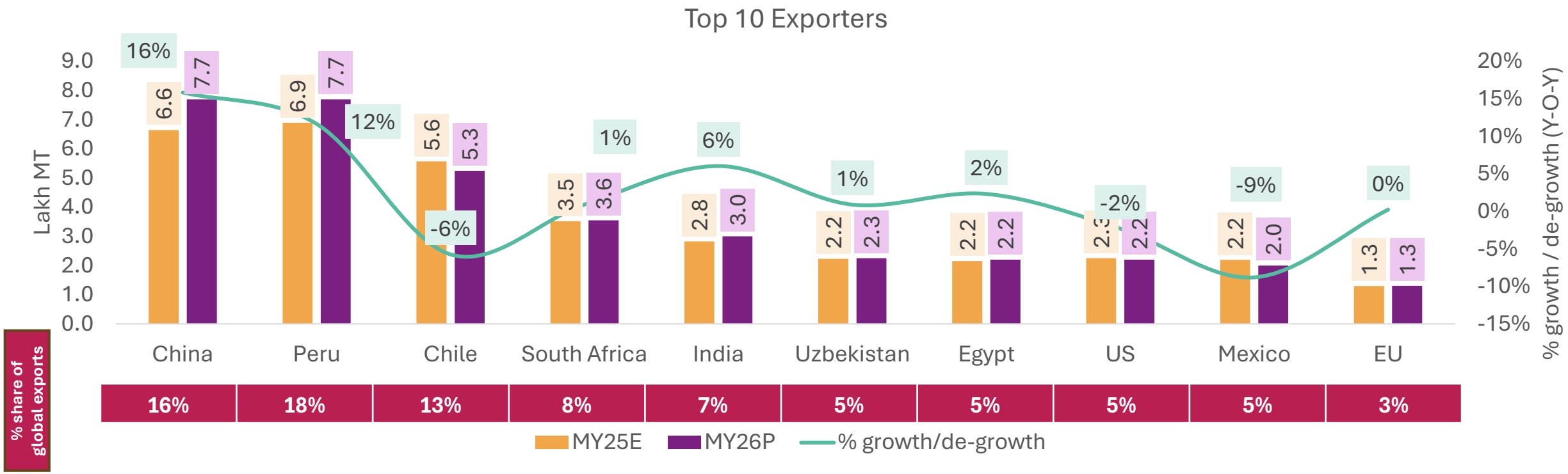
*Source: Production for MY2025E and MY2026P is based on data from USDA.*
*India's production referred from MoA&FW and projection based on trends and interactions*

# 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 shortages in Xinjiang, and weak wine demand, output is expected to recover in 2026 due to better climate, improved water management, and stable domestic consumption, normalizing yields in key vineyard regions. |
| **India** | Low | Low | Low | **11%** | Expected to fall ~4% in MY26 as unseasonal rains, fungal problems, and pruning disruptions in Nashik–Sangli caused vineyard removal and fewer plantings. |
| **Brazil** | Higher | Slightly lower | Stable | **6%** | Output is expected to stabilize after the 2025 decline, as improved weather boosts yields without major area expansion, matching 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 | Slightly higher | Slightly higher | **6%** | Production is set to increase as desert-irrigated, export-focused farms meet strong early European demand, with new varieties like Sweet Globe, Starlight, Melody, and Sweet Celebration boosting output and quality. |
| **EU** | Slightly lower | High | High | **5%** | Production is expected to partially recover from the 2025 decline as weather improves. Despite reduced acreage, EU output should rise 7–8%, though long-term growth is limited by ongoing vineyard area reductions. |
| **Turkey** | Low | Low | Low | **7%** | Production is expected to decline by ~23% as vineyard removals and weak wine demand in California reduce output potential, despite occasional yield improvements. |
| **Peru** | Slightly higher | High | High | **3%** | Peru's grape acreage expanded marginally (~1%), while production rose ~10% due to higher yields driven by favorable coastal climate, precision irrigation, and adoption of high-yield export varieties in key regions like Ica. |

# Export trends and price outlook

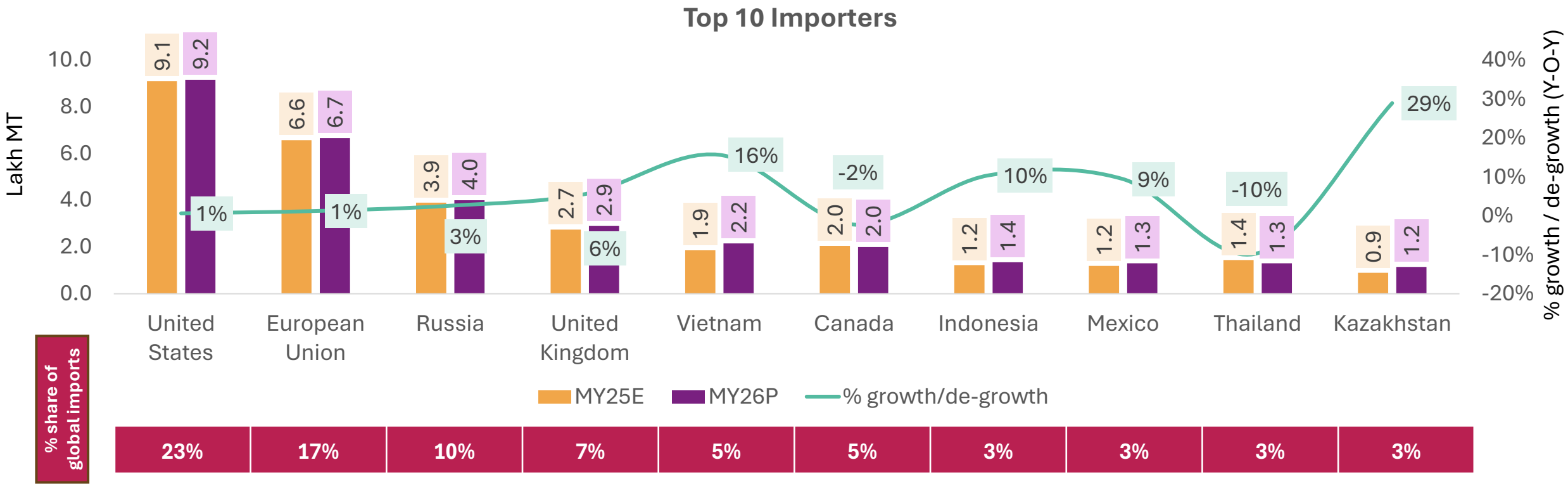
# Major exporters of Grapes




- The countries shown in the chart collectively account for **~89% of global table grape exports.**
- Global grape exports in MY26 (P) are expected to **rise modestly ~2-3%,** 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.
- In early **2026**, **European wholesale** markets are mainly supplied by **Peruvian (€4.30–€5.00/kg)** and **South African[1] (€3.40–€3.70/kg) grapes**, with high **Southern Hemisphere imports** keeping **prices low** and **increasing exporter competition**.

*Source: MY25E export volumes are from USDA, with estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & export trends.*
*Source1:* South African table grape 2025-26

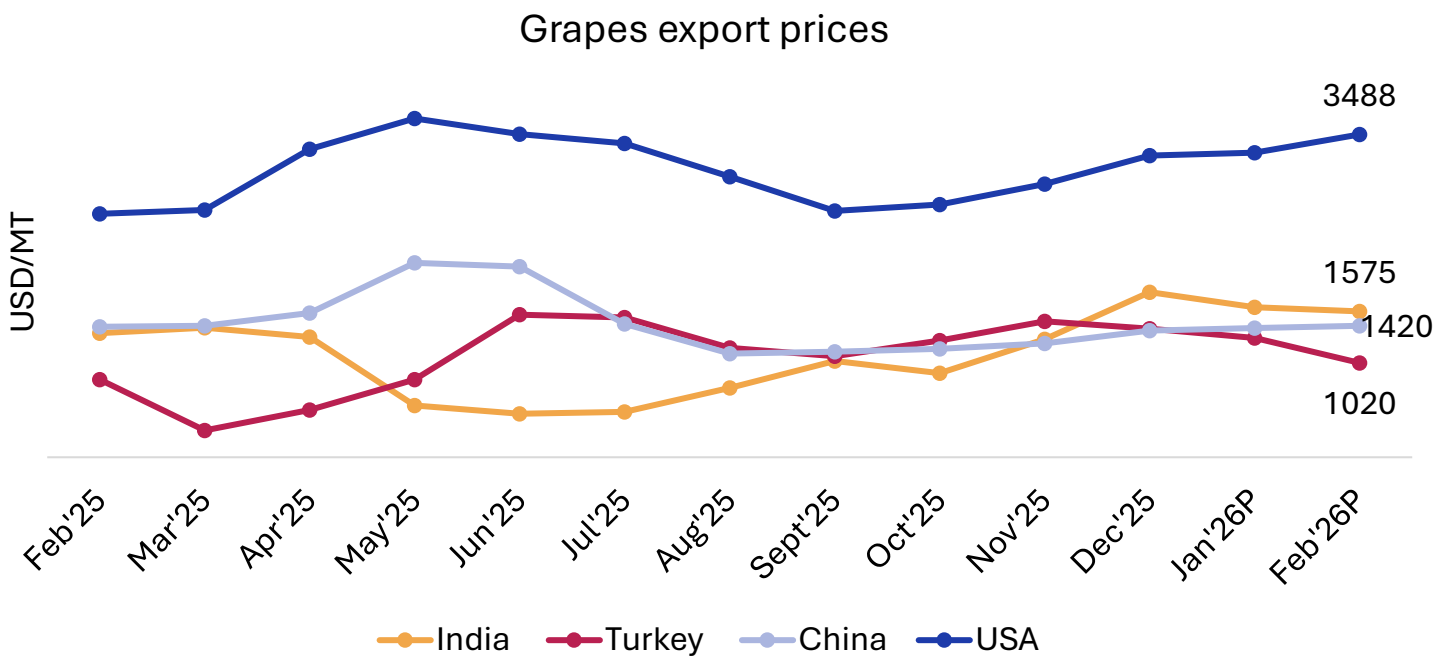
# Major importers of Grapes




- 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.
- **Chilean** table grape shipments to **the U.S.** are expected to drop by about **10%** in 2026 due to **market changes** and **variety shifts**, which may tighten supply during peak season and **increase reliance** on **Peru** and **Mexico**.
- Vietnam's grape imports for **MY26 are estimated to surge 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.

*Source: MY25E import volumes are from USDA, with estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & import trends.*

# Export prices forecast for grapes – Fundamental analysis

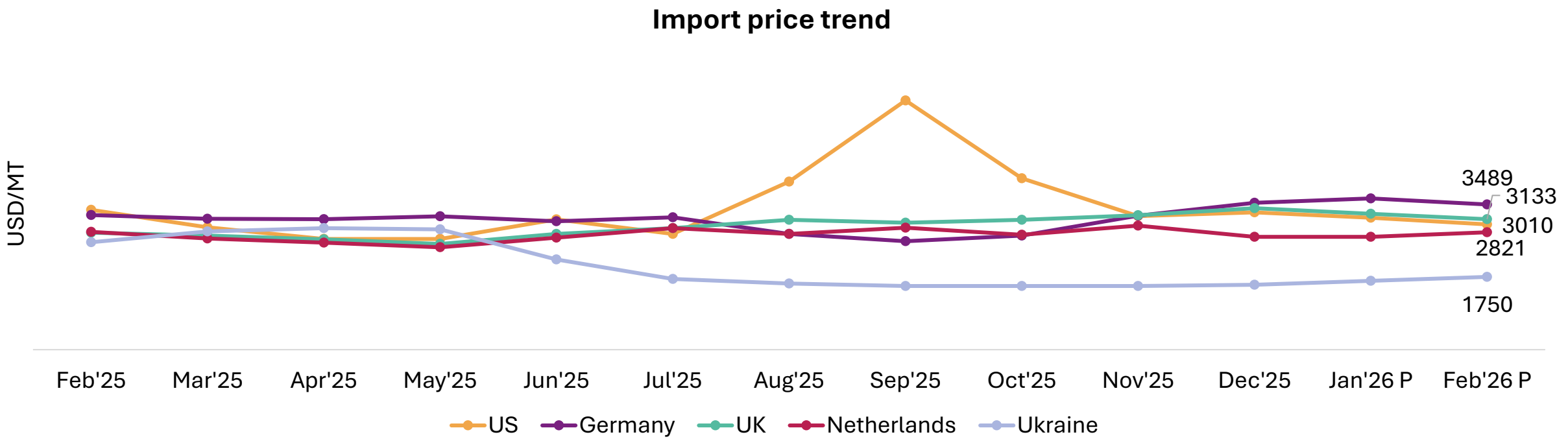



| Product | Feb'26 Price (USD/MT) | Feb'25 Price (USD/MT) | %age change | Indicative price change direction | Forecasted average price range for MAM 2026 (USD/MT) |
|---|---|---|---|---|---|
| **India** | 1575 | 1340 | **18%** | **Sideways** | 1400-1550 |
| **Turkey** | 1250 | 840 | **21%** | **Bearish** | 900-1000 |
| **China** | 1420 | 1410 | **1%** | **Bullish** | 1450-1550 |
| **USA** | 3488 | 2630 | **33%** | **Sideways** | 3400-3500 |

- India's grape export prices are trading at USD 1,575/MT, with the season ending soon and production down over 10%. High domestic prices and limited supply should keep export prices stable in the near term.
- China's table grape prices are likely to stay firm due to weather challenges, water shortages in Xinjiang, and slow vineyard growth, all supporting higher prices.
- Turkey's export prices are expected to soften as improved weather and higher yields boost supply, putting downward pressure on prices.
- US grape export prices likely to remain stable at USD 3,400–3,500/MT in the coming quarter, supported by steady demand and premium quality.

*Source: Prices are from ITC Trade Map (till Dec 2025); Jan & Feb 2026 figures are seasonality and trend-based estimates, (HSN Code: 080610)*
Note: MAM stand for March, April & May

# Price trends of key importing nations

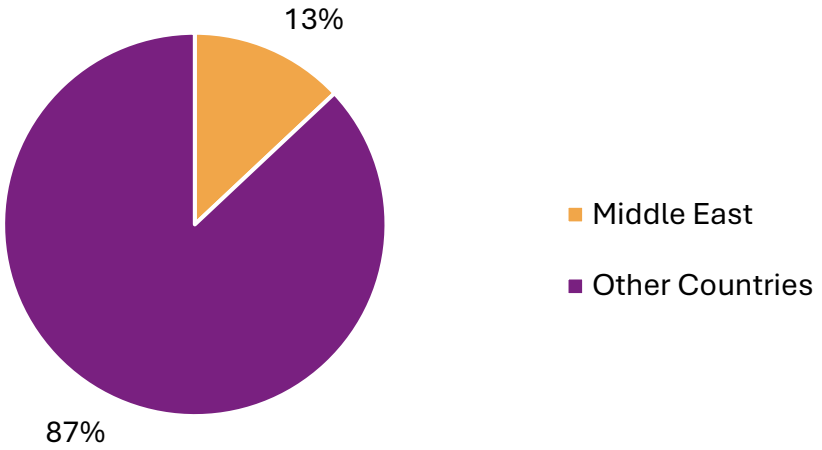



- U.S. grape import prices have eased slightly in recent months as increased shipments from Peru, Chile, and Mexico boosted seasonal availability, alleviating supply tightness following the holiday period.
- Germany's grape import prices gradually rose to range of USD 3,485-3,495/MT by February 2026, reflecting stable consumption and steady demand from EU retail chains. Prices have consistently increased since October 2025 as inventories tightened during the winter import window.
- UK grape import prices slightly moderated to a range of ~USD 3,130-3,135/MT in February, have remained moderately firm, driven by strong consumer demand for seedless varieties and higher logistics and import costs.
- Ukraine's grape import prices remained firm at ~USD 1,750/MT in February 2026, though they have gradually recovered from mid-2025 lows as imports increased to meet domestic demand and regional supply tightened.

*Source: Prices are from ITC Trade Map (till Dec 2025); Jan & Feb 2026 figures are seasonality and trend-based estimates, (HSN Code: 080610)*

# Tight domestic supply keeps Indian Grapes prices elevated:

% of Indian exports to Middle East Countries



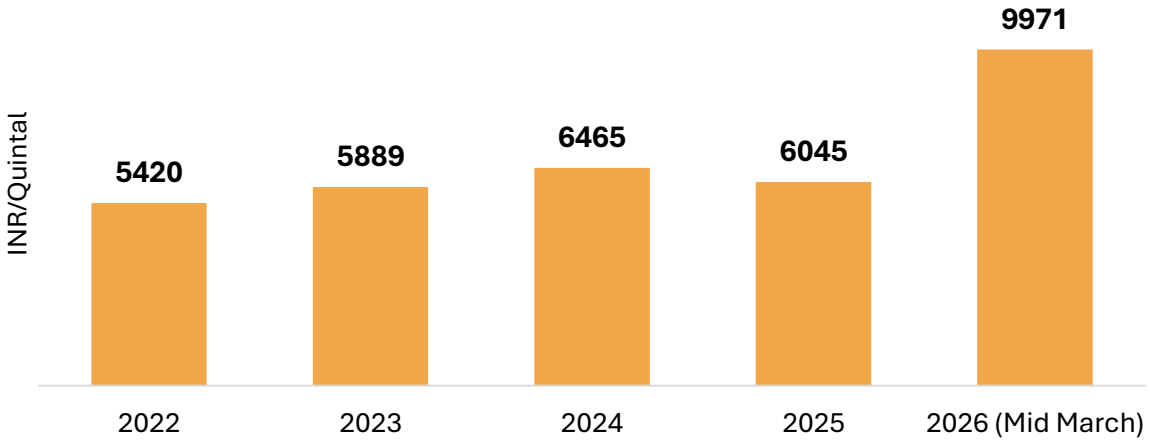

Around **13–15%** of **India's grape exports** are directed to **Middle East markets**, while the remaining **~85–87%** is exported to other destinations including **Russia** and **the European Union.**

**Export logistics** have been severely impacted, with **40-foot container** freight costs rising from about **$2,600 in February to over $6,000 in March.**

**Closure of key maritime routes** like the **Strait of Hormuz** and regional tensions caused temporary shipment disruptions and cargo congestion at ports such as **JNPT (Mumbai), stalling exports** for several days.

Prolonged transit times—caused by **vessels being rerouted** to **Russia** and **the EU—raise** the **risk of quality deterioration** and **potential rejection** at **destination markets**.

**Domestic Prices**




- Continuous rainfall between April–October 2025 reduced sunlight exposure, leading to an estimated >10% decline in grape production and tightening domestic supply.
- The harvesting season is nearing completion with only ~25–30 days of the marketing window remaining amid limited availability.
- Domestic grape prices surged ~94% YoY, increasing from ₹4,369/quintal (Feb 2025) to ₹8,468/quintal (Feb 2026), reaching historic highs.

Export opportunities for grapes in new markets **remain constrained**, as **reduced production** has led to **supply shortages**, while **historically high domestic prices** further **limit competitiveness** and **demand**.

*Source: Export figures have been considered from DGFT and includes findings from primary interactions; Domestic prices of grapes have been considered from AgMark.*

# 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.

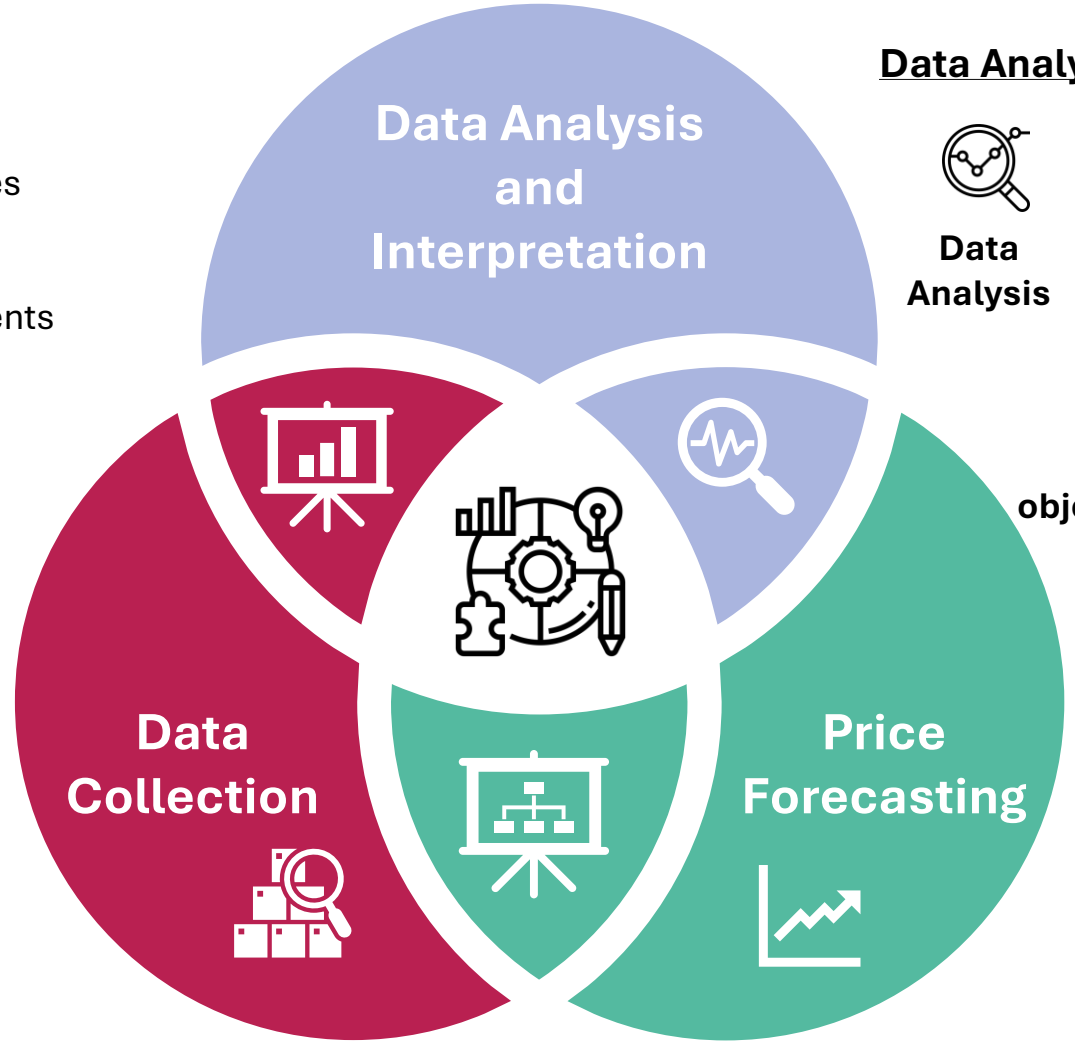
## Data Collection

**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 of FOB prices
- Macro-Economic & Trade Variables

Integration of commodity fundamentals 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.*