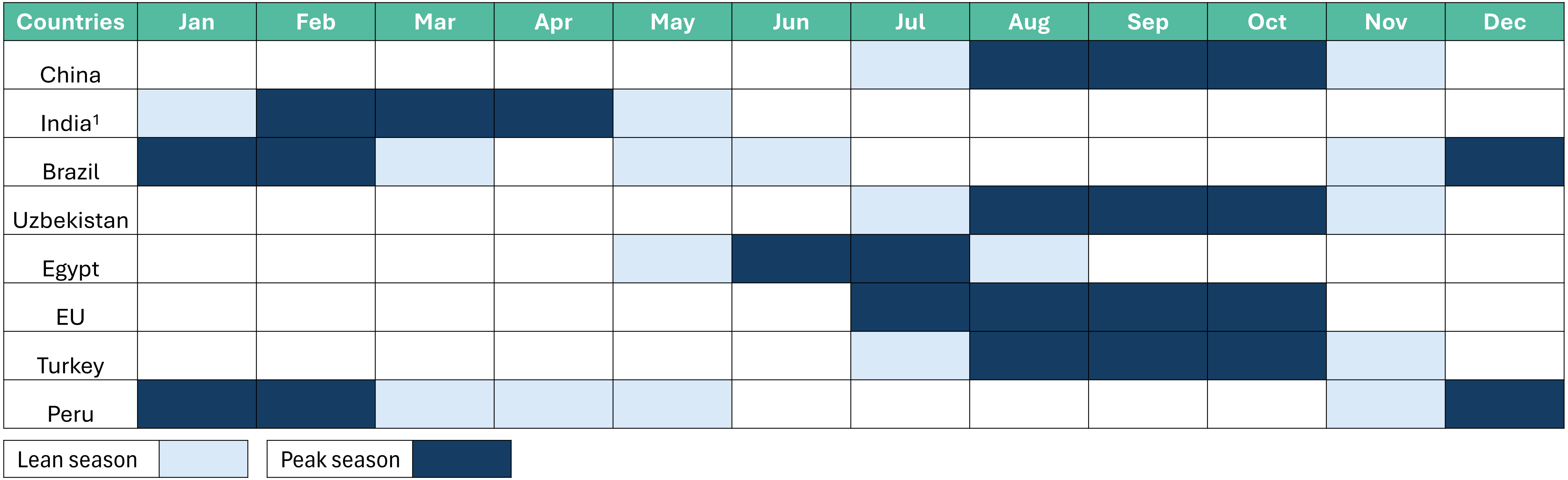
Monthly dashboard – Grapes

HS code: 080610

March 2026

Acreage and Production Trends

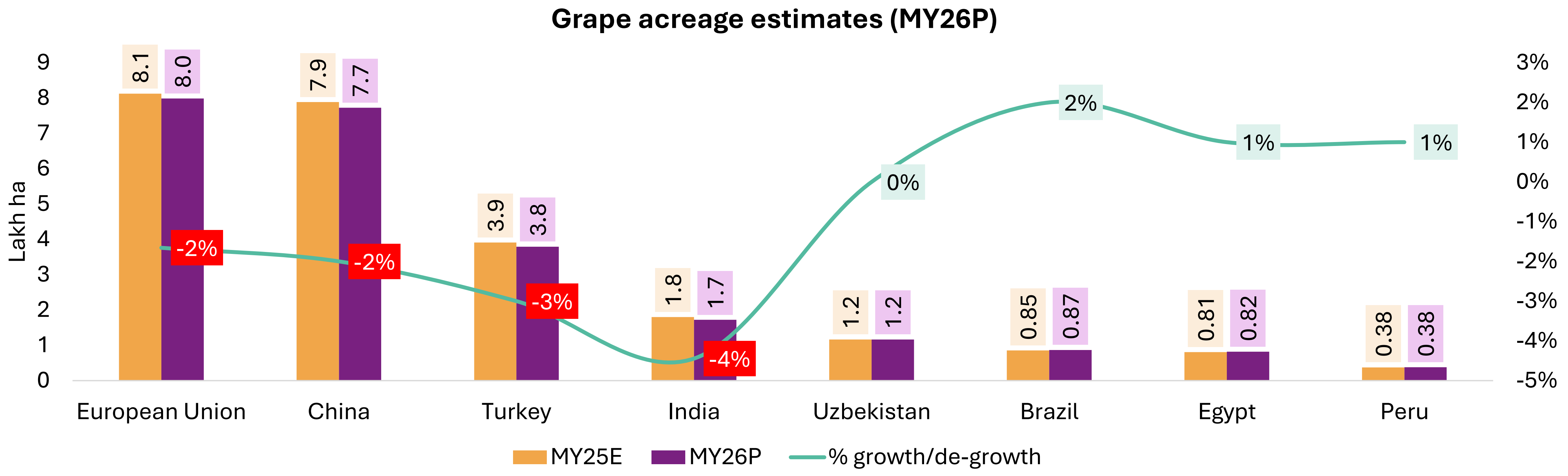
Grapes Crop Calendar of Major Producing Countries (Table Grapes)



- 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 between 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

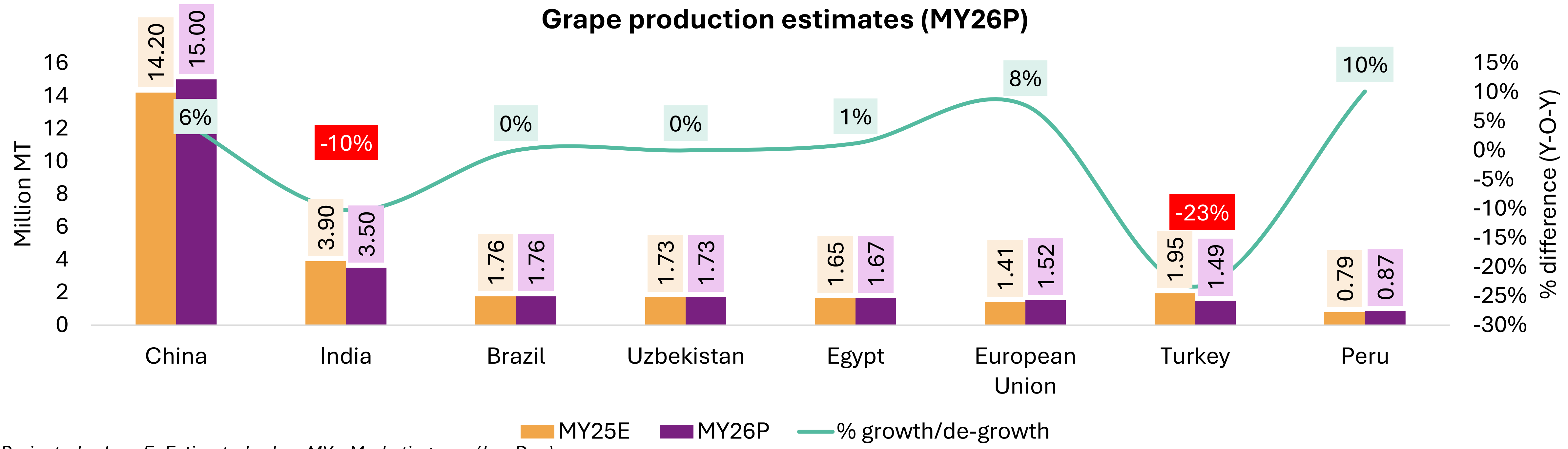


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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 **India, Turkey, China, and the EU**.
- **China's[1] grape acreage** is **set to decrease marginally in MY26P**, influenced by **ongoing water shortages** in regions like **Xinjiang**, **declining wine demand** as well as reported shift towards **more lucrative crops like cotton, corn,** and **melons**.
- **India's** grape acreage is **projected to decline ~4%** in **MY26P** as **severe production losses are expected** in **Maharashtra's Nashik–Sangli belt** due to **prolonged unseasonal rains**, **fungal pressure** and **pruning disruptions** which prompts **vineyard removal** and **reduces new plantings.**

Source: USDA; MY25 acreage estimated and MY26 projected based on historical trends and secondary research; *India's acreage referred from MoA&FW and projection based on trend analysis and interactions*
Source 1: China's cotton output

Production Estimates of Major Producing Countries



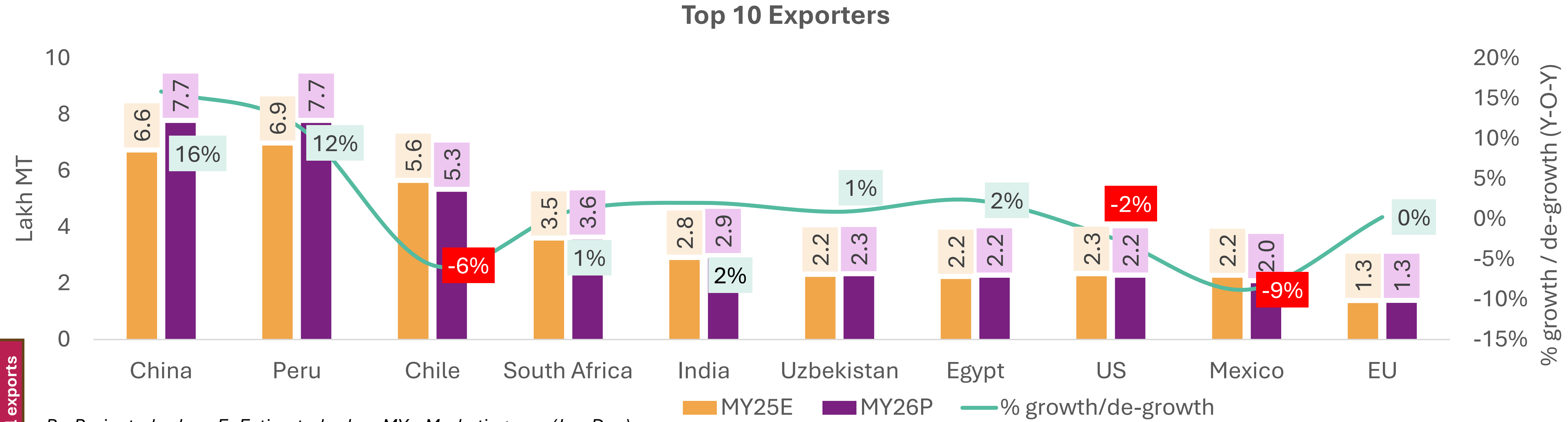
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **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 ~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: USDA: MY25 production estimated and MY26 projected based on historical trends and secondary research. *India's production referred from MoA&FW and projection is based on trend analysis and on ground interactions*

Export trends and price outlook

Major Exporters of Grapes



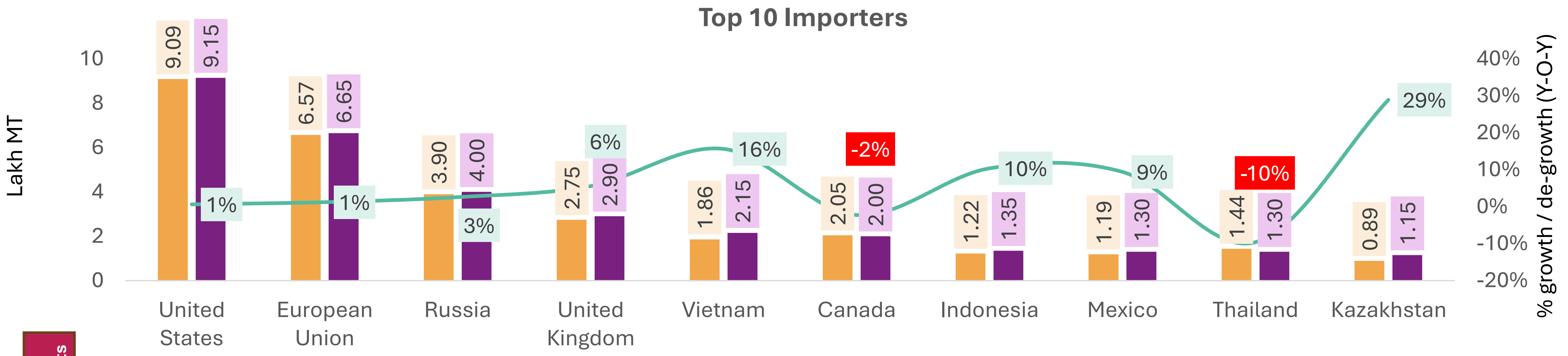
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

% share of global exports	China	Peru	Chile	South Africa	India	Uzbekistan	Egypt	US	Mexico	EU
	18%	18%	13%	9%	7%	5%	5%	5%	5%	3%

- The countries shown in the chart collectively account for **~89% of global table grape exports.**
- Global grape exports in MY26P are expected to **rise modestly ~2-3%,** driven by **strong growth** from **China** and **Peru** due to **improved cold chain infrastructure, higher reefer container availability, and short transit times supporting expanded supply**. However, **adverse weather**, **rising costs**, and **increased domestic consumption** are likely to **limit exports** from **Chile** and **Mexico**, moderating overall trade.
- During **early 2026**, **European markets** were predominantly **supplied** by **Peru** and **South Africa**, with **strong Southern Hemisphere shipments** driving **higher export volumes** and **intensifying competition** across **key supplying origins.**
- **India's**[2] export market is expected to **grow modestly** at **~2%, below earlier MY26P expectations** due to **West Asian conflicts** and **~16,000 tons of potential halts**. Heavy Gulf dependence—accounting for **~80% of Maharashtra's fruit exports**—is **driving delays**, **oversupply**, and **price pressure**, **weakening the near-term outlook.**

Source: USDA; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.
Source1: South African table grape 2025-26; 2. India's Export outlook

Major Importers of Grapes



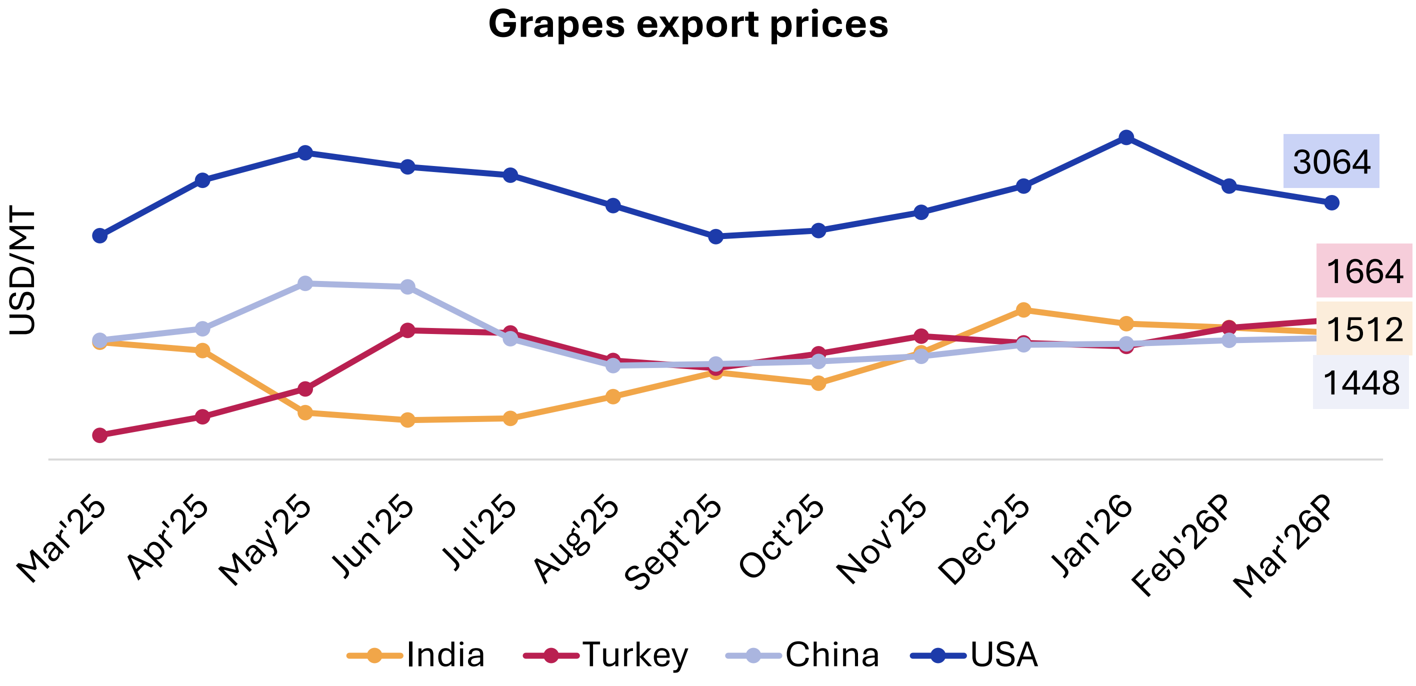
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

% share of global imports									
23%	**17%**	**10%**	**7%**	**5%**	**5%**	**3%**	**3%**	**3%**	**3%**

- The countries in the chart **account for ~ 80% of global table grape imports**. From MY20 to MY25, grape imports grew at a CAGR of 5–11% in Southeast Asia (Philippines, Indonesia, Vietnam, Malaysia), 8% in Bangladesh, 6% in Russia, and the EU.
- **Canada's[1] imports** are expected to **fall slightly down** due to **stable demand** and **sufficient carryover stocks**, along with **stronger domestic currency** reducing urgent buying and **smoother supply** from **the U.S. limiting stockpiling needs.**
- Vietnam's grape imports for **MY26P 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: USDA; MY25E import volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.
Source 1: Canada's grape imports

Export Prices Forecast for Grapes – Fundamental Analysis

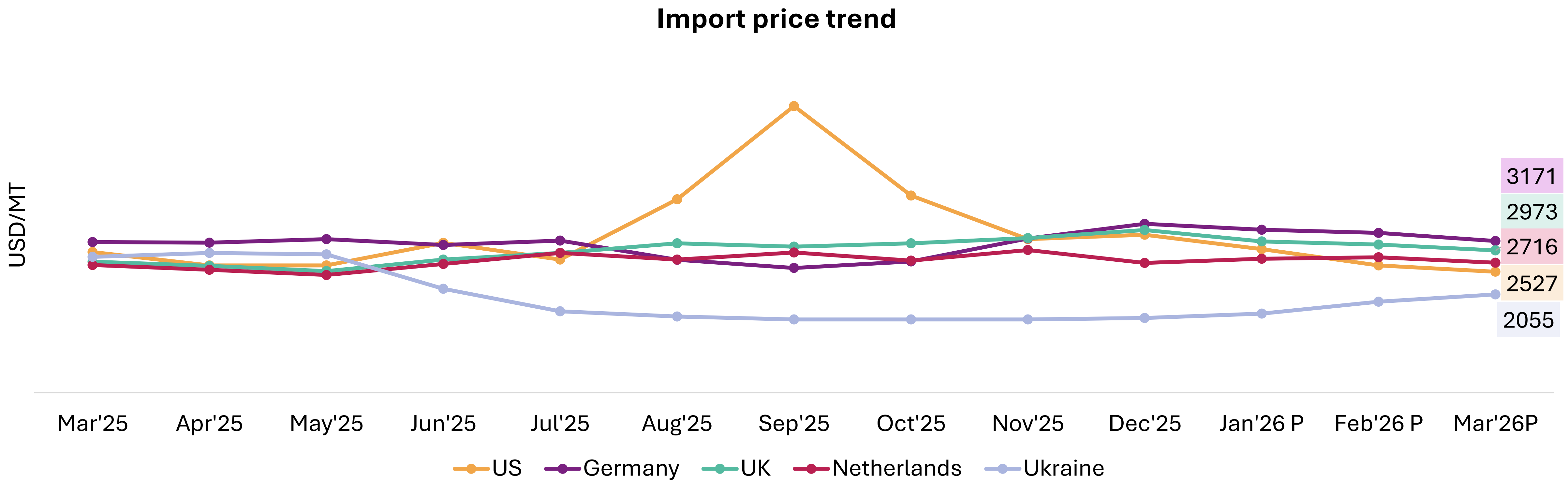


Product	Mar'26P Price (USD/MT)	Mar'25 Price (USD/MT)	%age change	Indicative price change direction	Average projected price range for AMJ 2026 (USD/MT)
India	1512	1400	8%	Bearish	1200-1260
Turkey	1664	290	474%	Bullish	1850-1950
China	1448	1420	2%	Bullish	1550-1650
USA	3064	2670	15%	Sideways	3050-3150

- **India's** grape prices are anticipated to hover at **~USD 1500–1550/MT** in **Mar'26** despite **lower production (>10–15%)** and **season ending**, as **stable supply** from **Brazil** and **Egypt** offsets global demand, keeping the overall outlook **slightly bearish** in the next quarter.
- **China's** table grape prices are projected to remain **stable**, underpinned by **adverse weather conditions**, **water scarcity** in **Xinjiang**, and **sluggish vineyard expansion**—all factors contributing to **sustained price elevation**.
- **Turkey's** grape export prices surged **~474% YoY** due to **prior weather shocks** (drought, spring frost) **cutting output over 30%**. With production still down **(~23%)** and lean season ongoing, prices (**~USD 1660-1670/MT**) are expected to remain **firm** over the next quarter.
- **US** grape export prices are expected to **hold steady** within the **~USD 3,050–3,150/MT** range over the forthcoming quarter, bolstered by **consistent demand** and **superior product quality.**

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates, (HSN Code: 080610) Note: AMJ stand for April, May & June 2026.

Price Trends of Key Importing Nations

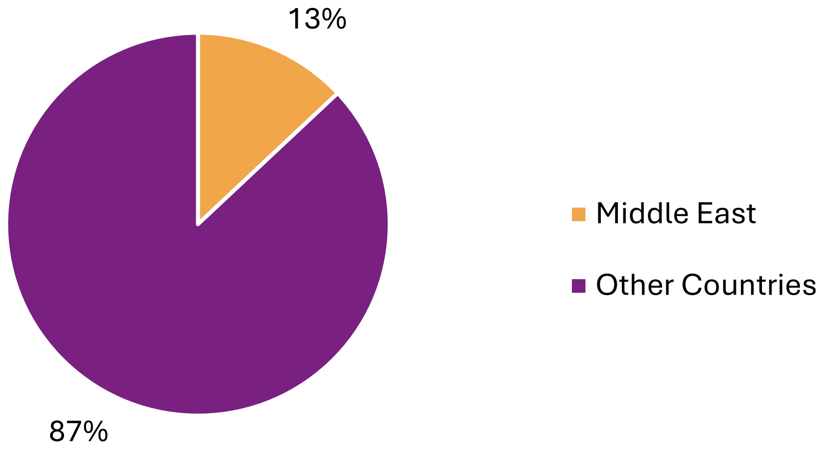


- **U.S.** grape import prices are anticipated to **decline ~5% MoM** in **Mar'26P** as **higher arrivals** from **Peru**, **Chile**, and **Mexico improved** market availability, **easing earlier supply tightness**, while **normalized post-holiday demand** and comfortable inventories **softened pricing momentum.**
- **Germany's** grape import prices are expected to **stay at-par YoY** in **Mar'26P**, reflecting **stable consumption** and **steady EU demand**, while prices softened since December 2025 due to **improved import flows** from **Southern Hemisphere origins** and easing winter supply tightness.
- **Netherlands**' grape import prices are projected to **decline ~4–5%** MoM to **~USD 2,520-2,530/MT** as **increased arrivals** from **Peru** and **South Africa improved supply**, while its role as a **re-export hub** and **stable EU demand** softened pricing amid better inventory availability.
- **Ukraine's** grape import prices are expected to **remain firm** at **~USD 2,050-2,060/MT** in **March 2026**, though they have gradually recovered from mid-2025 lows as imports increased to meet domestic demand and regional supply tightened.

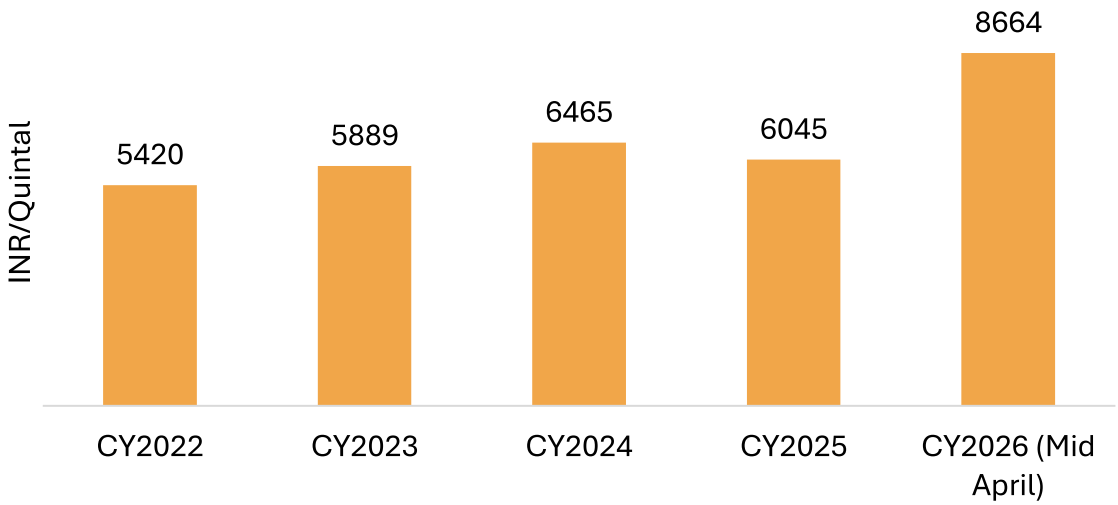
Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates (HSN Code: 080610)

Tight domestic supply keeps Indian Grapes prices elevated

% of Indian exports to Middle East Countries



Domestic Prices



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.**

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.

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.**

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**.

- 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 approximately 65% year-over-year, increasing from ₹4,375 per quintal in March 2025 to ₹7,818 per quintal in March 2026, reaching historic highs for the month of March over the past decade.

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.

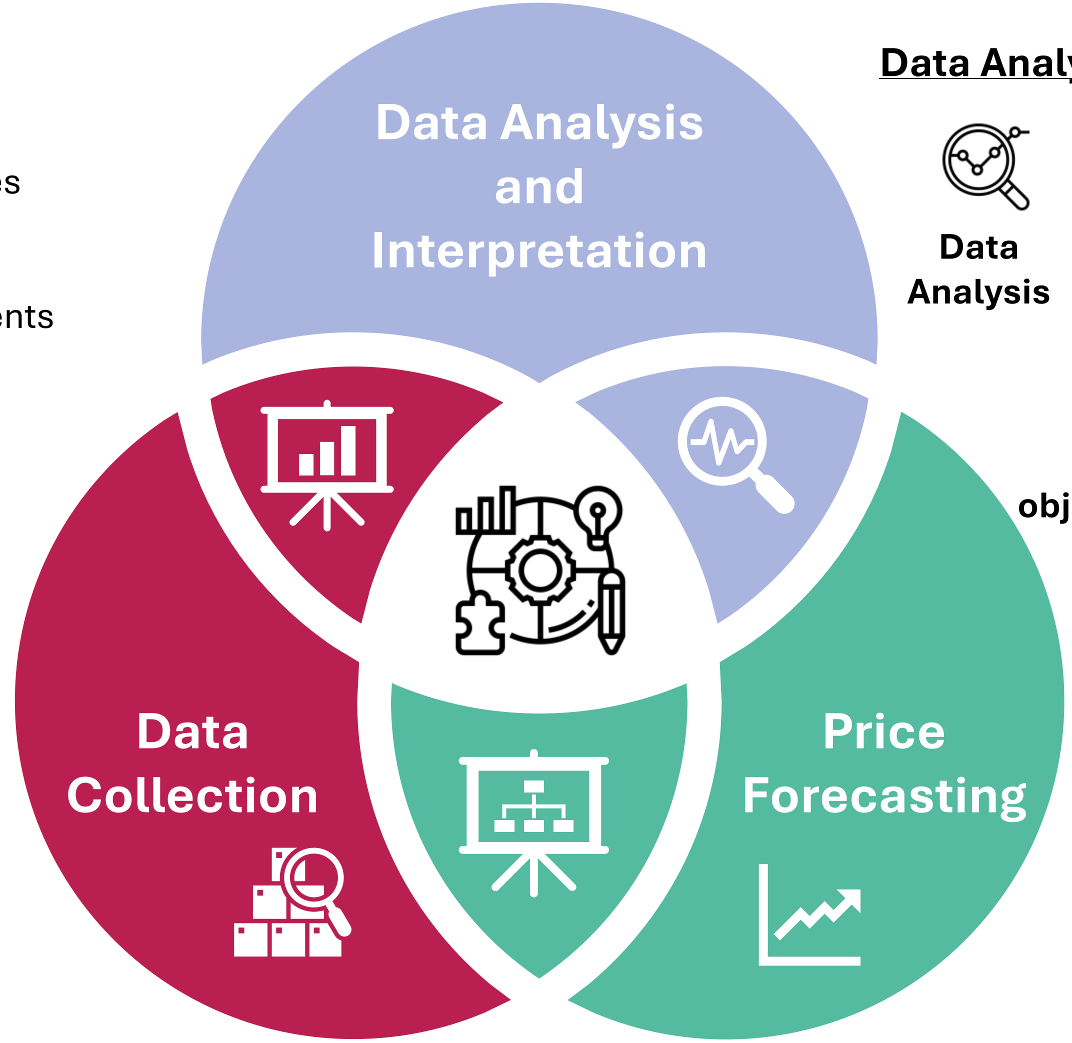
Data Collection

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.