Crisil Intelligence

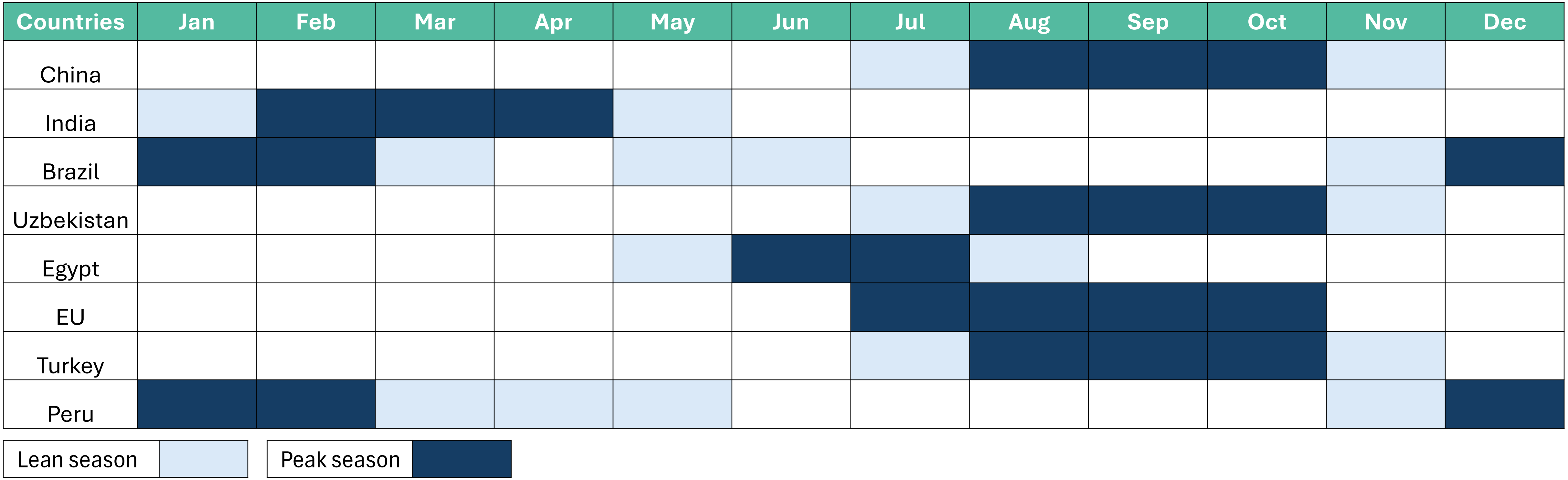
Monthly dashboard Grapes

April 2026

HS code: 080610

Acreage and Production Trends

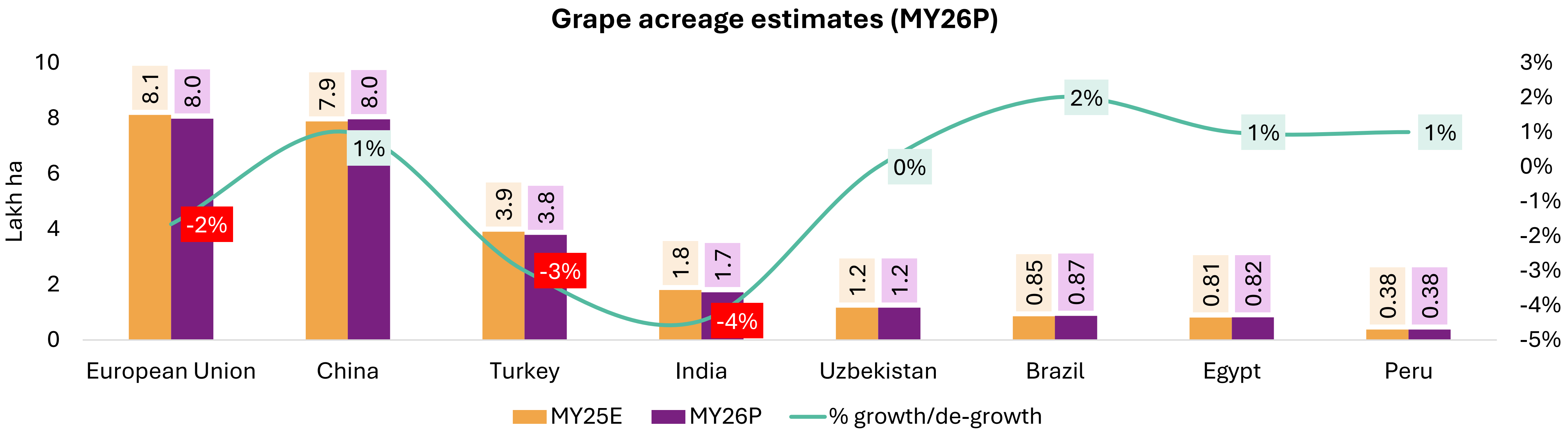
Grapes Crop Calendar of Major Producing Countries (Table Grapes)



- The grape harvesting season for most major producing countries, including China, Turkey, the EU, and the Uzbekistan, peaks between August and October.
- However, India, Peru, 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

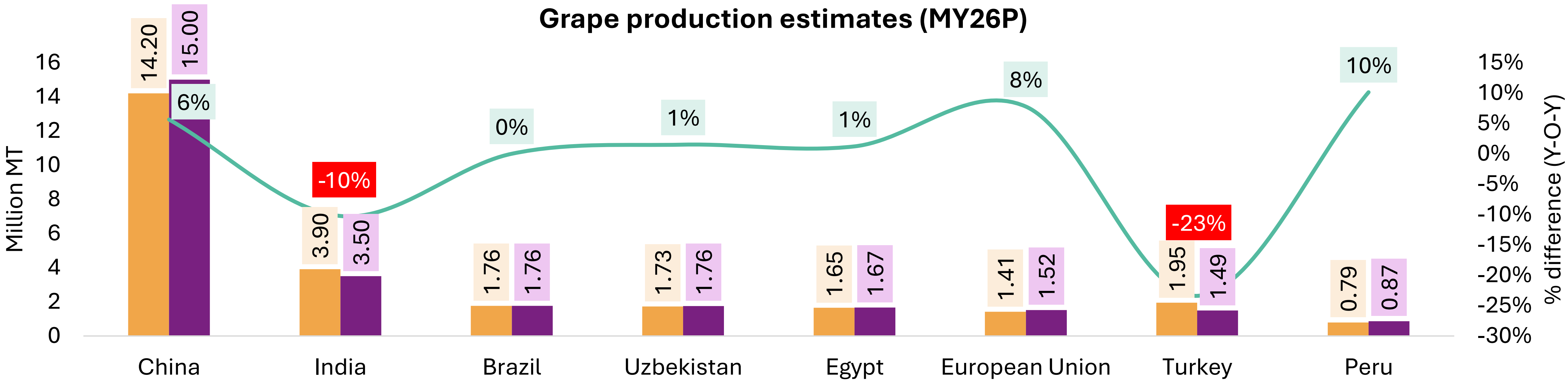


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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 and the EU**.
- **China's**[1] grape acreage is expected to **inch up** in **MY26P**, led by expansion of **Shine Muscat** and **Crimson Seedless** in **Xinjiang**, **Yunnan** and **Hebei**, as growers continue shifting toward **premium**, **higher-value varieties** backed by strong domestic demand.
- **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 are estimated and MY26 figures are 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 grapes output*

Production Estimates of Major Producing Countries



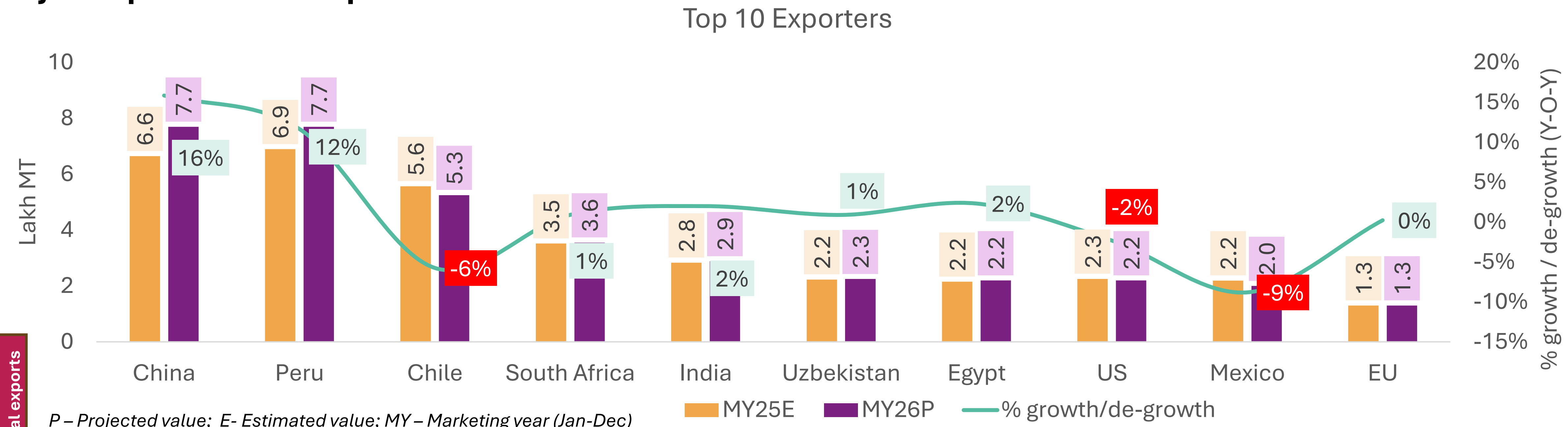
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries shown in the chart account for ~ **90% of global table grape production.** MY26P global production is expected to remain broadly stable to marginally lower (~0–1% decline YoY).
- **China**, accounting for ~50% of global table grape production, is expected to grow by ~5–6%. Production in other key countries is also projected to increase by ~1–10% YoY, except for Turkey and India, which are likely to decline by ~23% and ~10%, respectively.
- **Turkey's grape production** is **projected to decline sharply (~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 inch up marginally (~1-2%)** in **MY26P**, 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 are estimated and MY26 figures are 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



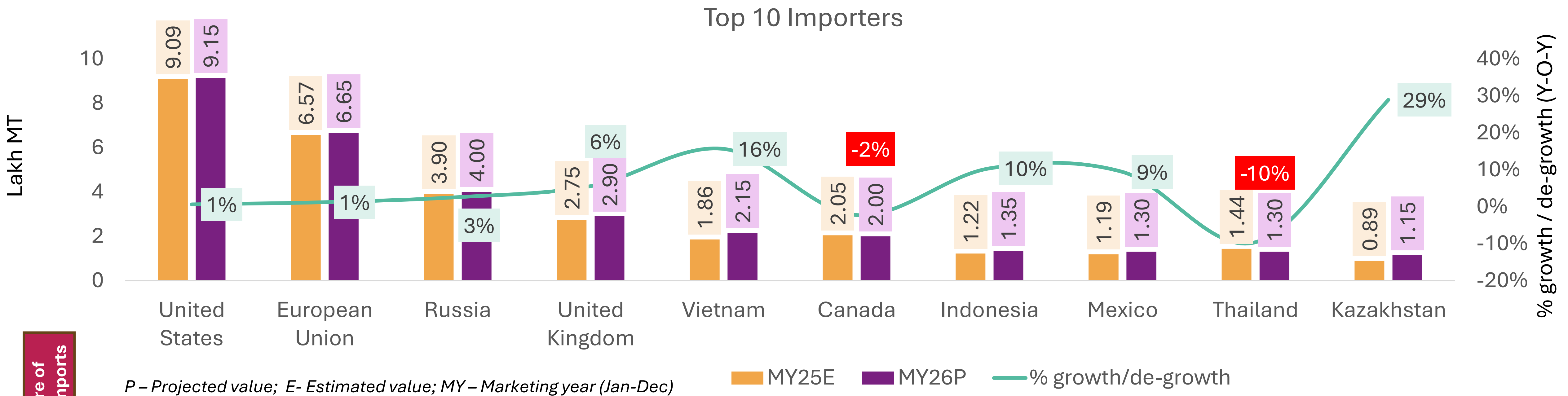
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

% 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 **~90% 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** to **Vietnamese & Indonesian markets, supporting expanded supply**. However, **adverse weather**, **rising costs**, and **increased domestic consumption** are likely to **limit exports** from **Chile** and **Mexico**, moderating overall trade.
- **Peru's**[1] grape exports are expected to climb **7.7 Lakh MT**, with growth **limited** to **12%** despite **strong demand potential as higher freight costs**, **the Strait of Hormuz disruptions**, and a **slowdown in Peru's** overall agro-export growth (**16% to 6.4% in Q1 2026)** limit further upside.
- **India's**[2] grape exports are projected to **grow modestly (~2%)** in **MY26P**, constrained by **West Asian conflicts** and **~16,000 tons** of potential shipment disruptions. **Heavy reliance** on **Gulf markets (~80% of Maharashtra's fruit exports)** is causing **delays**, **oversupply**, and **price pressure**, weakening the short-term outlook.

Source: USDA; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.
Source1: Peru's Grape exports; 2. India's Export outlook

Major Importers of Grapes



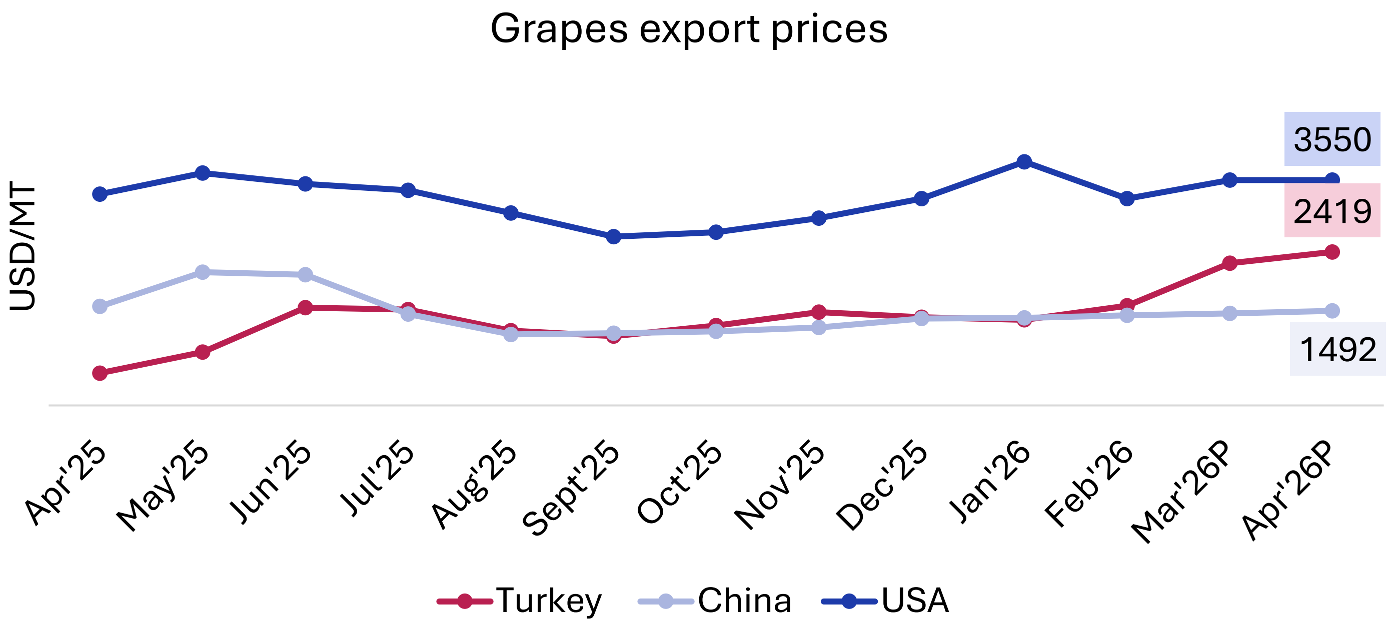
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

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

- **The countries in the chart represent ~80% of global table grape imports**. Between MY20 and MY25E, imports grew strongly, with Southeast Asia (Philippines, Indonesia, Vietnam, Malaysia) recording a 5–11% CAGR, followed by Bangladesh (~8%), and both Russia and the EU at ~6%.
- **Canada's[1] imports are projected to decrease** slightly by ~2%, due to adequate inventories in North America, and stable demand conditions.
- **UK[2]** grape imports are projected to **rise 6%** to **2.90 Lakh MT**, driven by intensifying **health-conscious snacking demand**, near-total import reliance due to **negligible domestic production**, and **diversified counter-seasonal supply** from **South Africa**, **Peru**, and **Spain**.

Source: USDA; MY25E import volumes include estimates where recent data is unavailable; MY26P figures are based on trade estimates and export trends.
Source 1: [Canada's grape imports](); 2. [UK's grape imports]()

Export Prices Forecast for Grapes

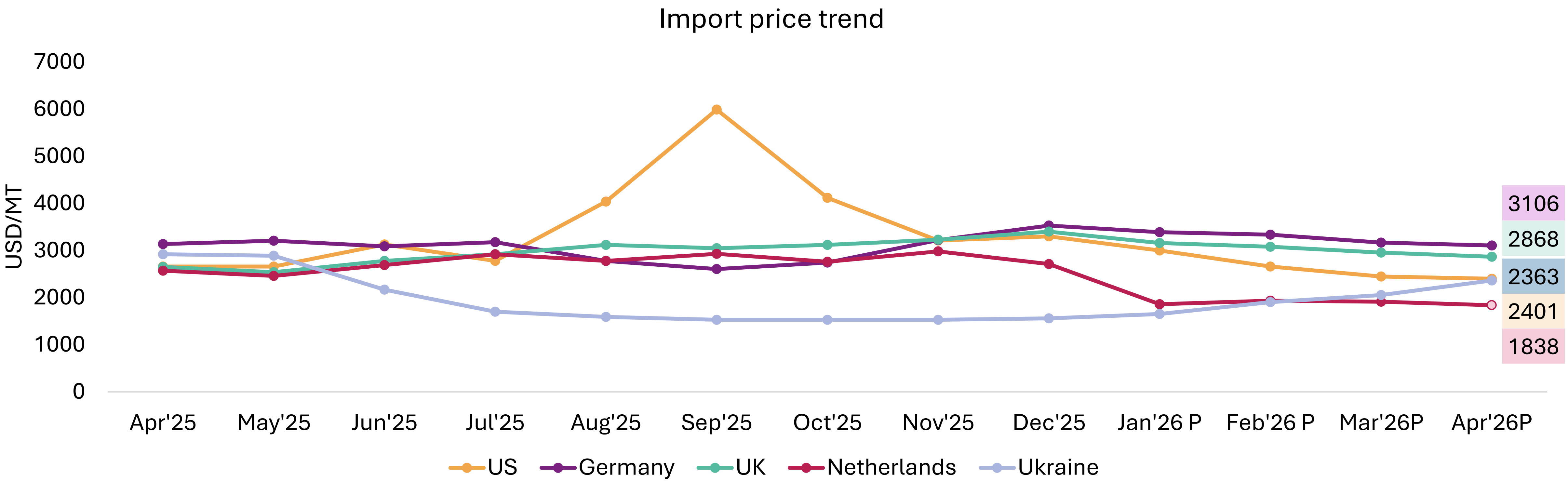


Product	Apr’26P Price (USD/MT)	Apr’25 Price (USD/MT)	%age change	Indicative price change direction	Average projected price range for MJJ 2026 (USD/MT)
Turkey	2419	510	374%	Bullish	2680-2740
China	1492	1560	-4%	Bullish	1580-1640
USA	3550	3330	7%	Sideways	3540-3600

- **China's** table grape prices are projected to remain **bullish in upcoming quarter** , 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 ~374% YoY** on the back of **severe weather shocks (drought and spring frost)** that reduced output by over **30%.** With production **still down (~23%)** and the **lean season persisting**, prices **(~USD 2,680–2,740/MT)** are expected to remain **firm** in the **coming quarter.**
- **US** grape export prices are expected to **hold steady** within the **~USD 3,540–3,600/MT** range over the forthcoming quarter, bolstered by **consistent demand** and **superior product quality.**

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

Price Trends of Key Importing Nations



- **U.S.** grape import prices are anticipated to **decline ~2% MoM** in **Apr'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 **decline ~1% YoY** in **Apr'26P**, reflecting **stable consumption** and **steady EU demand**, while prices softened since January 2026 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 1,830-1,840/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 estimated to have remained firm** at ~USD 2,360–2,370/MT in April 2026, having gradually recovered from mid-2025 lows as higher imports met domestic demand amid tighter regional supply.

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

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.

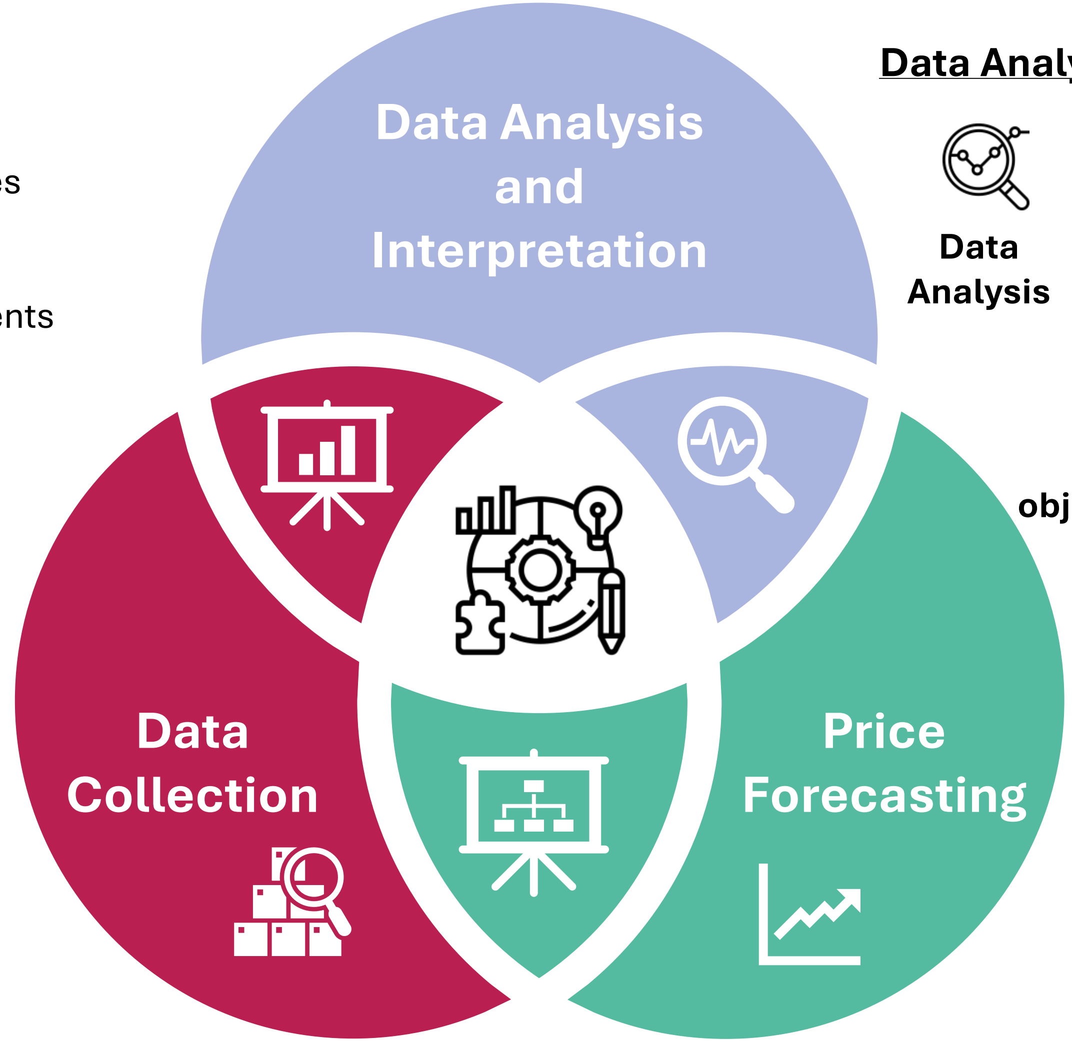
Data Collection

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.