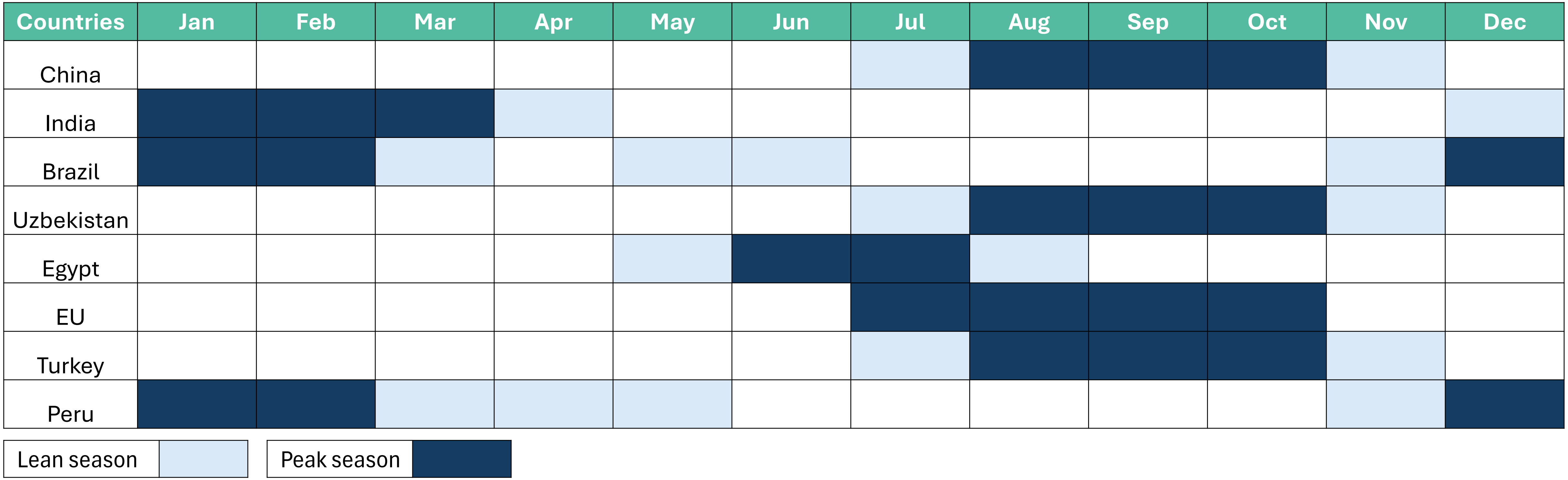
Monthly Dashboard Grapes

May 2026

HS code: 080610

Acreage and Production Trends

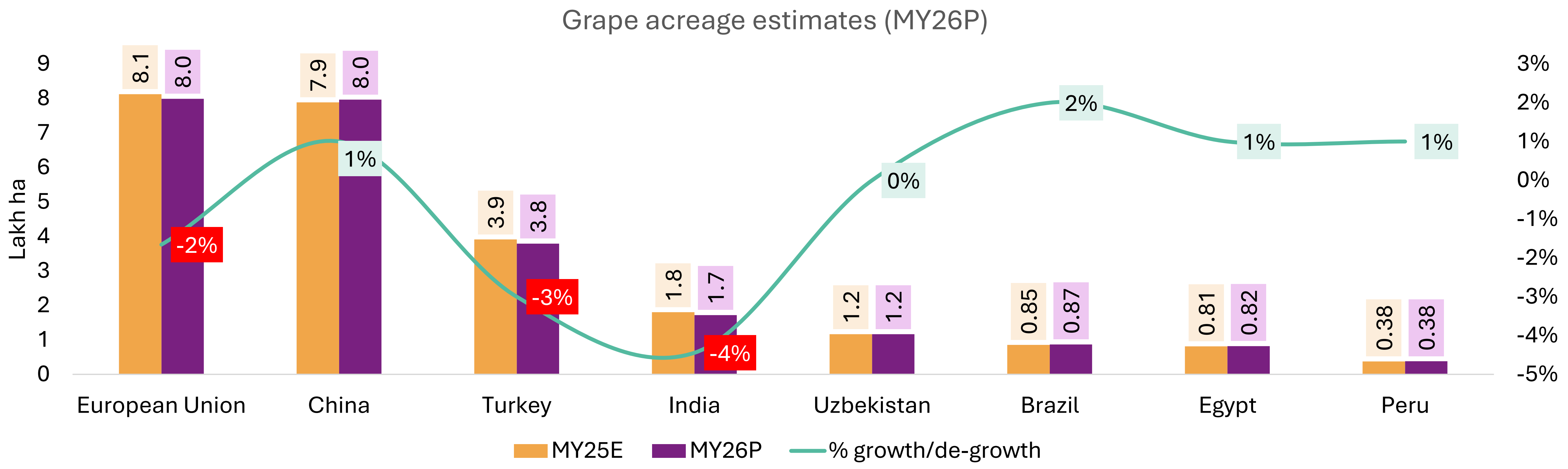
Grapes Crop Calendar of Major Producing Countries (Table Grapes)



- The grape harvesting season for most major producers (China, Turkey, EU, Uzbekistan) peaks between August and October.
- In contrast, India, Peru, and Brazil operate in a counter-seasonal window between December and April, providing a market advantage during the global off-season.
- This seasonal spread leads to high global supply from August to October, while counter-seasonal production supports trade opportunities and pricing stability.

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

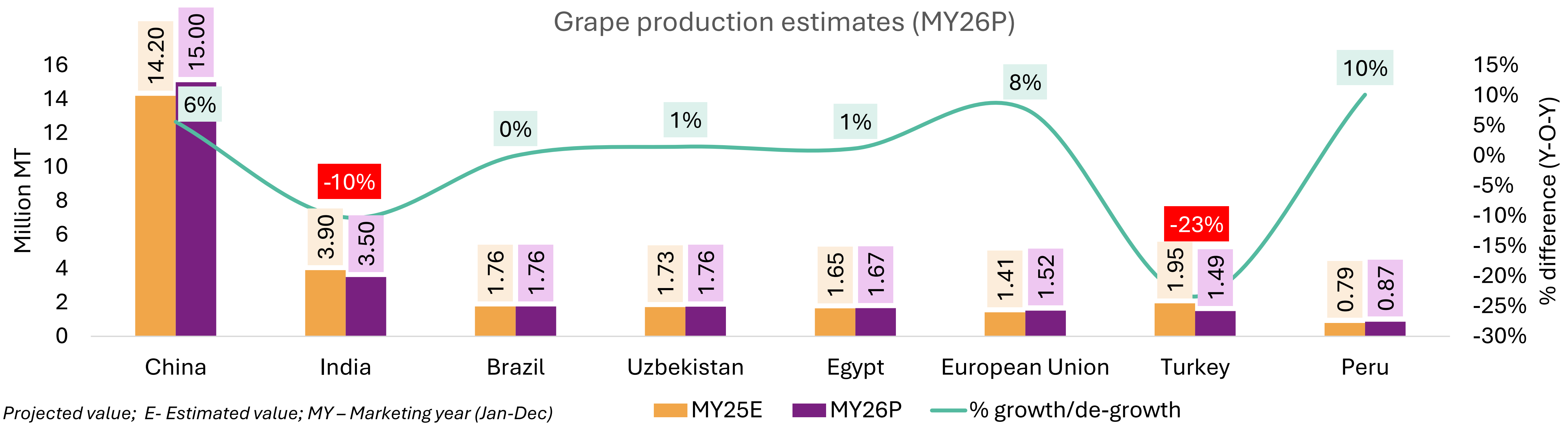


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries shown in chart contribute **~60% of global table grape area**. For MY26P, global acreage is set to **fall by ~1-2% YoY**, primarily led by India and Turkey, with a modest decline in 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**, **high-value varieties** backed by strong domestic demand.
- **India's** grape acreage is projected to **decline ~4%** in **MY26P** due to severe **production losses** in **Maharashtra's Nashik–Sangli belt**. **Prolonged unseasonal rains** in **May–June'26** increased **fungal pressure**, **disrupted pruning**, and **prompted vineyard removal** and **fewer new plantings** in **Nashik**, **Sangli**, and **Satara.**

Source: USDA; MY25 acreage is 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



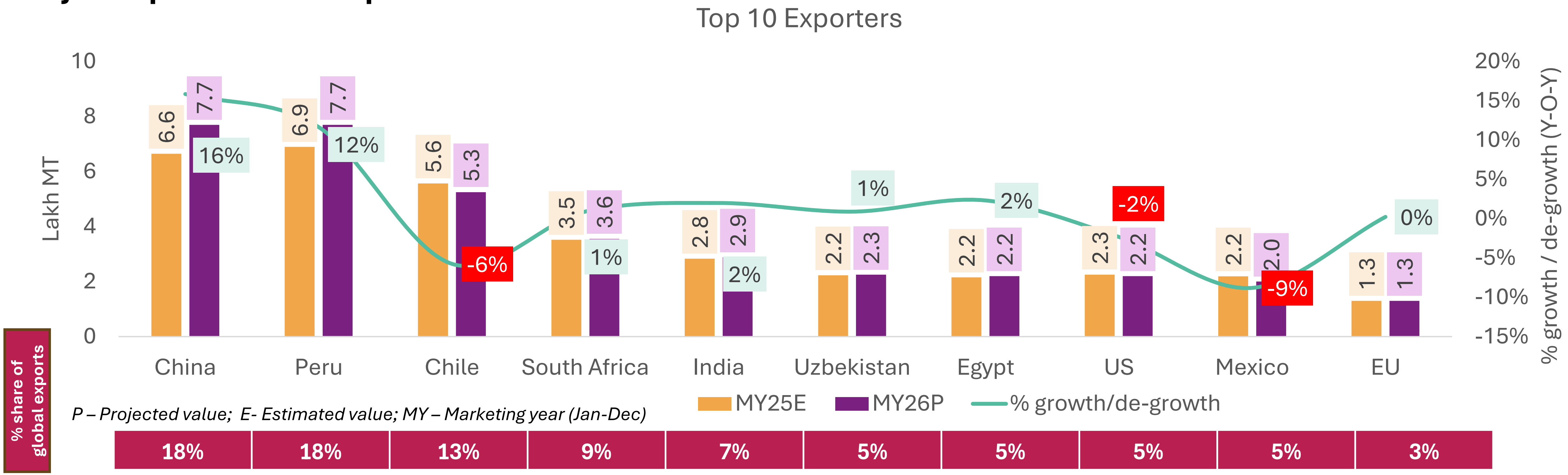
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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**, contributing ~50% of global table grape production, **is projected to grow by ~5–6%,** while most other key countries see modest gains (~1–10% YoY). This is partly offset by declines in Turkey (~23%) and India (~10%), with Brazil remaining stable.
- **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 rise marginally (~1–2%)** in MY26P, supported by modern vineyards and improved irrigation under government initiatives, despite stable acreage.

Source: USDA: MY25 production is 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

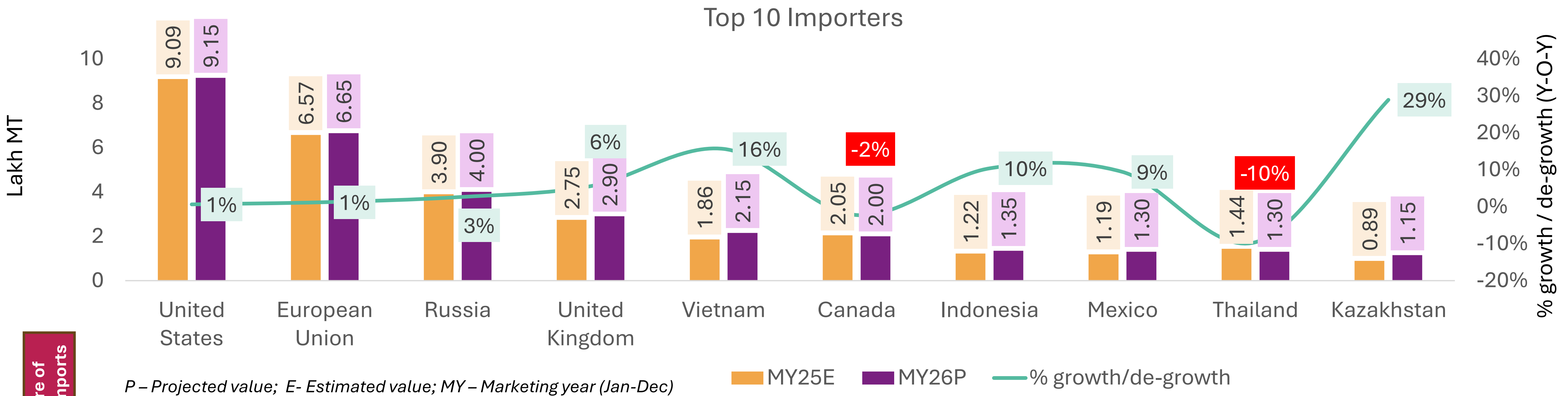
Major Exporters of Grapes



- The countries shown in the chart collectively account for **~90% of global table grape exports.**
- **Global grape exports in MY26P are expected to rise ~3–4%,** driven by strong growth in China and Peru, supported by improved logistics, cold chain infrastructure, and regional demand. However, adverse weather, rising costs, and higher domestic consumption are likely to constrain exports from Chile and Mexico, moderating overall trade.
- **South Africa's[1] grape exports are projected to grow marginally (~1%) to 3.6 lakh MT** in MY26P, as shipments are rerouted via Eastern Cape ports to mitigate Cape Town logistics disruptions. However, higher rerouting costs (~Rs 30–40 per 4.5 kg carton) are likely to pressure margins and limit volume growth despite a strong crop.
- **India's[2]** grape exports are projected to be **capped at ~2%** in **MY26P**, as **West Asian conflicts** disrupts **~16,000 tons** of potential **Gulf bound** shipment disruptions. **Heavy reliance** on **Gulf markets (~80% of Maharashtra's fruit exports)** is causing **JNPA clearance delays**, 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: SA's Grape exports; 2. India's Export outlook

Major Importers of Grapes



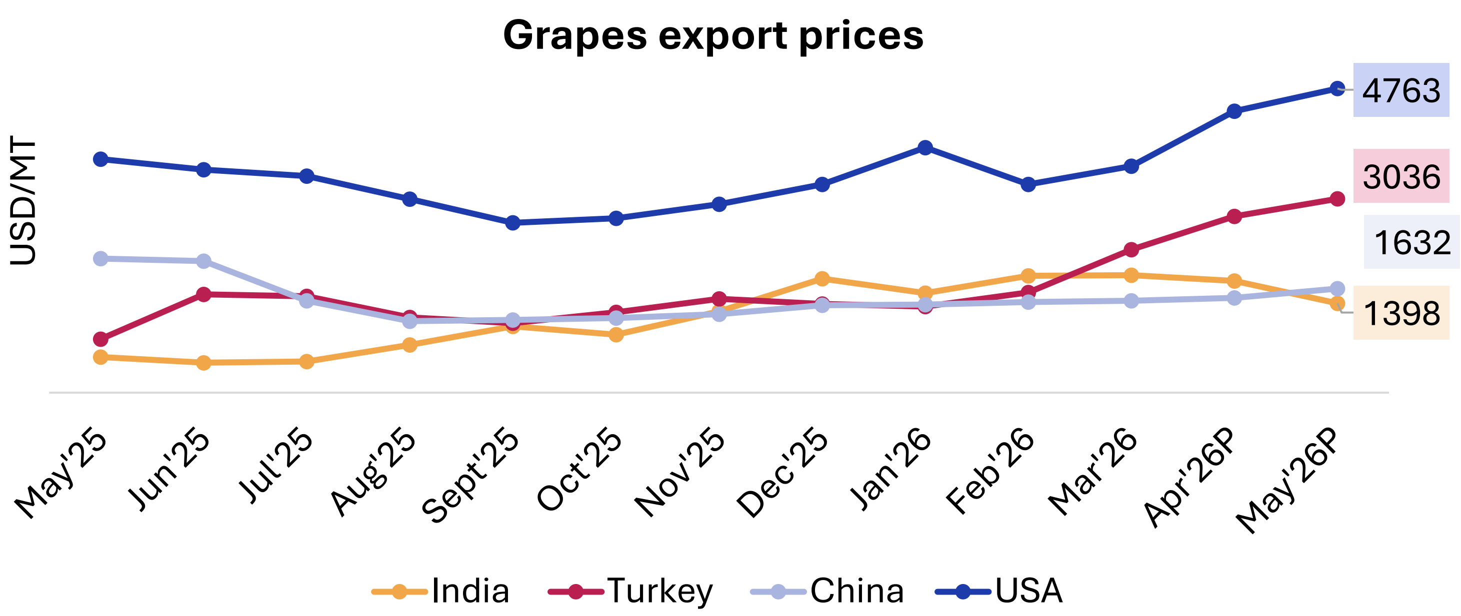
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

% 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%.
- **Vietnam's**[1] grape imports to **rise ~16%** YoY to **2.15 lakh MT**, as buyers diversify sourcing away from China toward Peru.
- **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**.
- **Kazakhstan's** grape imports in **MY26P** are anticipated to reach **1.15 lakh MT**, up **~29%**, building on 2025 growth, when grape imports jumped **1.8 times** to **0.89 lakh MT**, supported by demand for varieties like **Thompson**, **Crimson**, **Red Globe**, and **stronger regional supply.**

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

Export Prices Forecast for Grapes



Price outlook for next quarter (JJA)					
Countries	May'26 P Price (USD/MT)	May'25 Price (USD/MT)	%age YoY change	Price direction	Average projected price range for JJA (USD/MT)
India	1398	560	**150%**	**Bullish**	1520-1580
Turkey	3036	840	**261%**	**Bullish**	3040-3100
China	1632	2100	**-22%**	**Bearish**	1510-1570
USA	4763	3660	**30%**	**Bearish**	4270-4330

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

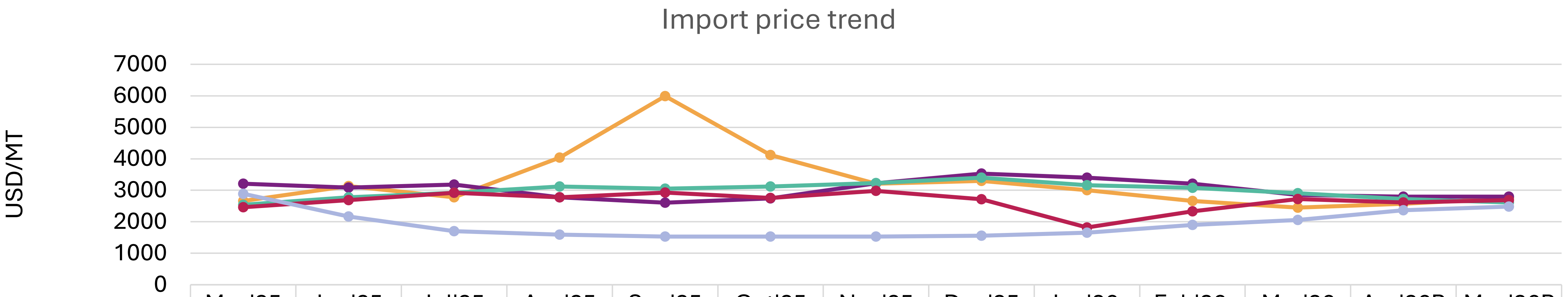
- **India's** grape export prices are anticipated to **spike ~45-50% over the upcoming quarters (JJA'26)** as the recent harvest **season ends**, leaving only thin, high-grade export volumes (~40% of residual crop); scarcity pushes prices **~USD 1520-1580/MT in the upcoming quarter**, before **China/Turkey's** Aug-Oct harvest pressures global supply.

- **China's** table grape prices are projected to remain **bearish in upcoming quarter** , as **record domestic production (~15 MMT)** creates oversupply in **MY26P**, with low-cost **Shine Muscat** variety dominating volumes in **Southeast Asia** keeps average realizations under pressure.

- **Turkey's grape export prices surged ~261% YoY due to severe weather shocks** (drought and spring frost) that cut output by over 30%. With production still down (~23%) and the lean season ongoing, prices (~USD 3,040–3,100/MT) are **expected to remain firm** in the coming quarter.

- **The US** grape export prices to decline at **~USD 4,270-4,330/MT** in the coming quarter **JJA'26P**, as an early-starting **2026 California harvest** delivers **excess volumes** faster than the **56+ export markets** can absorb, with seasonal oversupply outweighing steady demand.

Price Trends of Key Importing Nations



	May'25	Jun'25	Jul'25	Aug'25	Sep'25	Oct'25	Nov'25	Dec'25	Jan'26	Feb'26	Mar'26	Apr'26P	May'26P
US	2660	3130	2780	4040	5990	4120	3210	3300	3000	2660	2450	2570	2750
Germany	3207	3088	3178	2779	2606	2742	3221	3529	3398	3208	2854	2797	2797
UK	2540	2780	2920	3120	3050	3120	3230	3400	3160	3080	2910	2720	2611
Netherlands	2460	2690	2920	2780	2930	2760	2981	2713	1820	2330	2720	2611	2690
Ukraine	2890	2170	1700	1590	1530	1530	1530	1561	1654	1902	2055	2363	2481

- **U.S.** grape import prices are anticipated to **rise ~7% MoM** in **May'26P** as **lower arrivals** from **Peru**, **Chile**, and **Mexico affect** market availability, **tightening earlier supply** and capping the existing inventories.
- **Germany's** grape import prices are expected to **decline ~13% YoY** in **May'26P**, as improved **import flows** from **Southern Hemisphere origins** and **enhanced winter supply** boost **availability**, while **consistent EU demand** keeps the pullback **gradual** rather than **sharp.**
- **Netherlands**' grape import prices are projected to **rise ~3-4%** MoM in **May'26P** to **~USD 2,685-2,695/MT** as **reduced arrivals** from **Peru** and **South Africa tightens supply**, with distributors restocking ahead of the seasonal gap adding further upward pressure.
- **Ukraine's grape import prices are estimated to have remained firm MoM** at **~USD 2,480-2,490/MT** in May 2026, having gradually recovered from mid-2025 lows as higher imports met domestic demand amid tighter regional supply.

Source: ITC Trade Map (up to Mar 2026); prices for Apr & May 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.

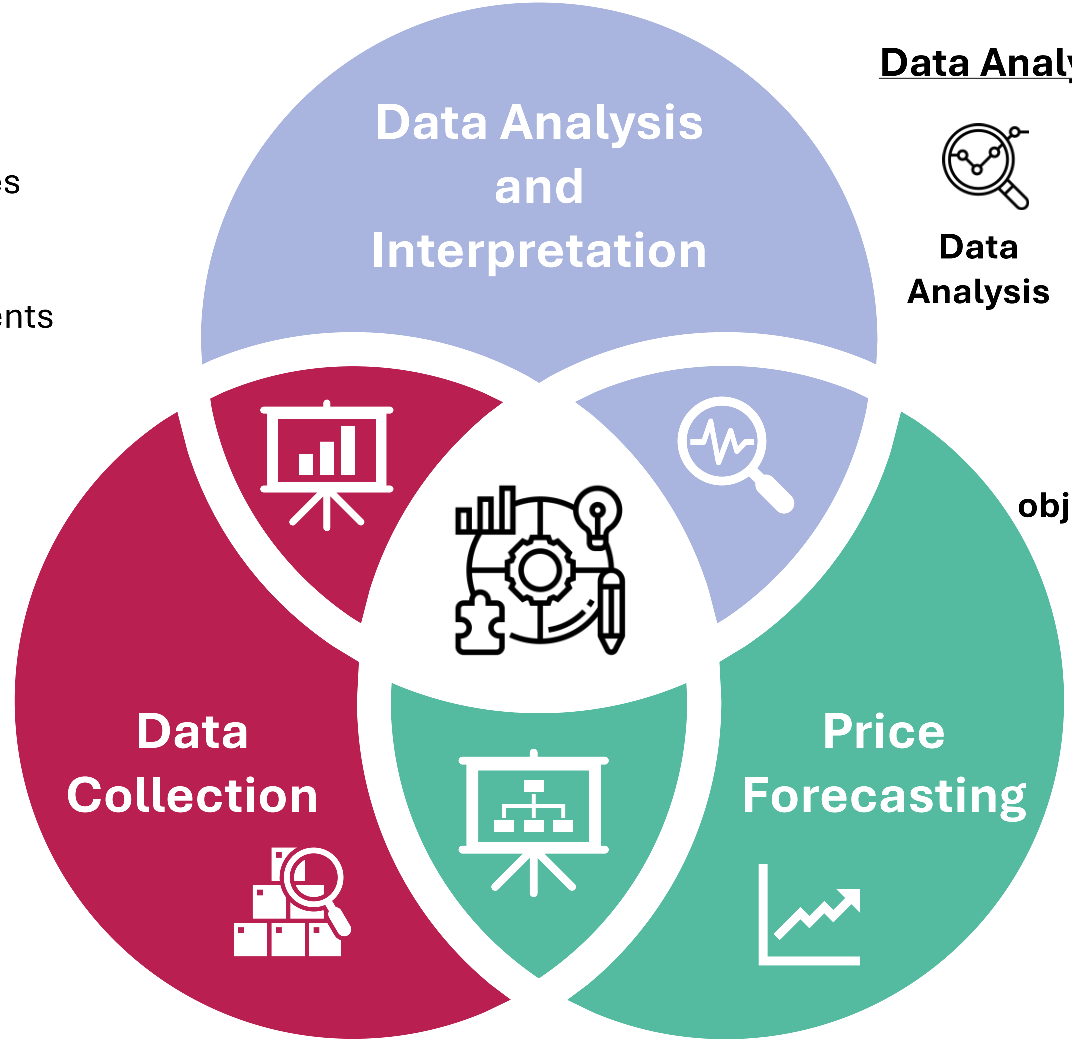
Data Collection

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.