Crisil Intelligence

एपीडा
APEDA

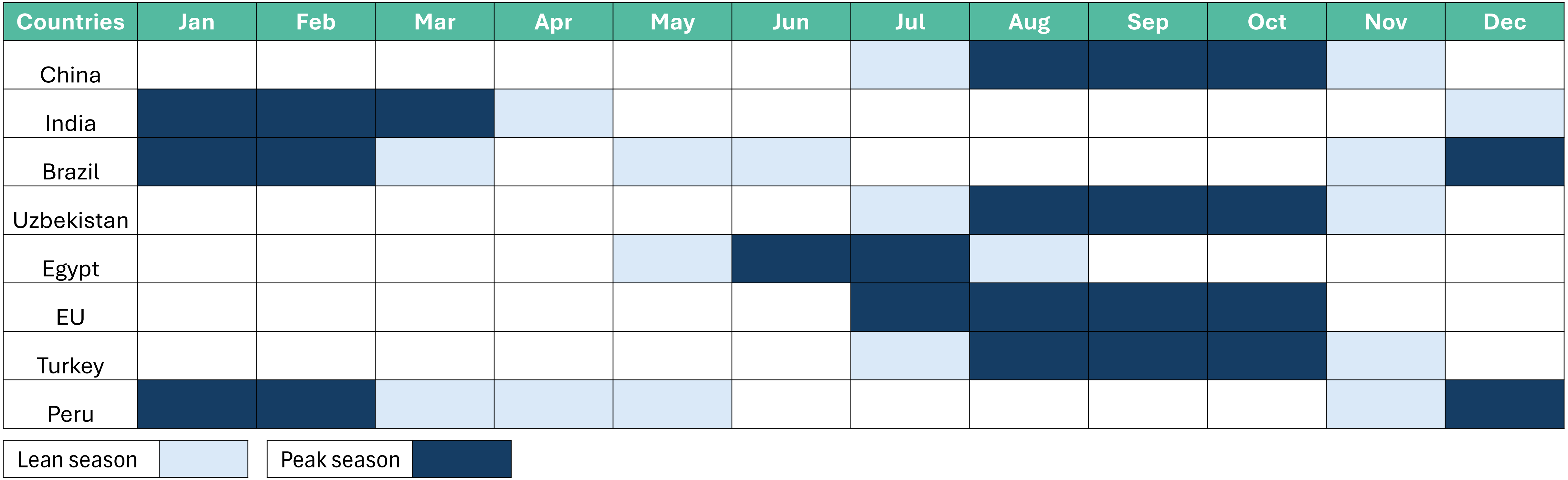
Monthly Dashboard Grapes

June 2026

HS code: 080610

Acreage and Production Trends

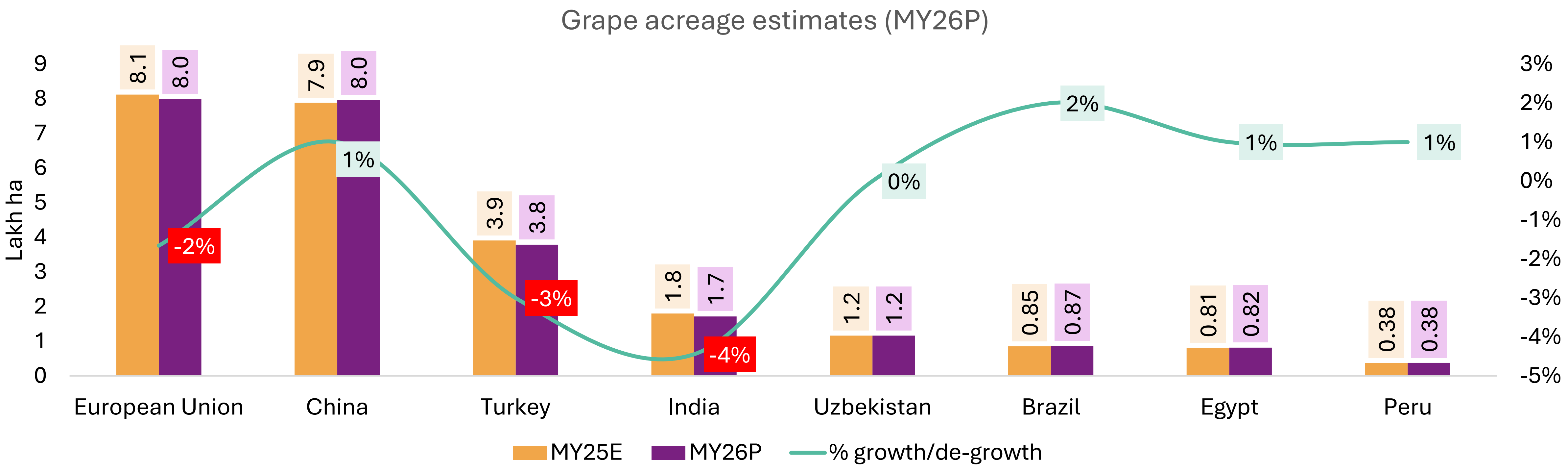
Grapes Crop Calendar of Major Producing Countries (Table Grapes)



- The grape harvesting season for key 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 to be Jun-May
MY25E refers to the current harvesting season and estimates for grapes in major producing countries during June'25-May'26.

Acreage Estimates of Major Producing Countries



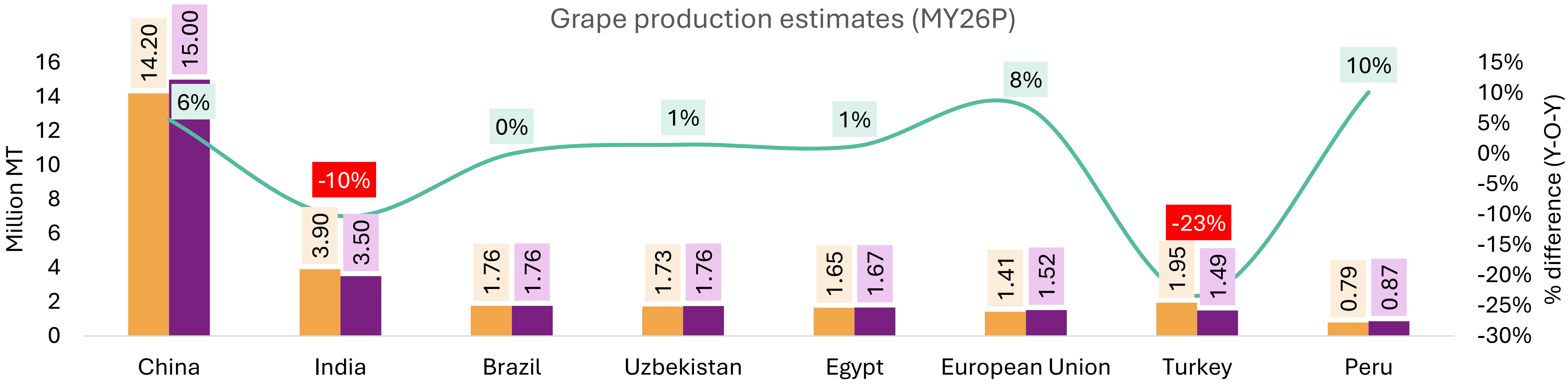
P – Projected value; E- Estimated value; MY – Marketing year (Jun-May)

- The countries shown in the chart contribute **~60% of global table grape acreage**. For MY26P, global acreage is set to **fall by ~1-2% YoY**, primarily led by EU, Turkey and India.
- **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 by ~4% in MY26P**, largely due to vineyard removals and reduced new plantings following severe production losses in Maharashtra's Nashik–Sangli belt. Prolonged unseasonal rains during May–June'26 increased fungal pressure, disrupted pruning activities, and adversely affected grower sentiment across 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

Note: Growth rates are calculated using unrounded acreage values

Production Estimates of Major Producing Countries



P – Projected value; E- Estimated value; MY – Marketing year (Jun-May)

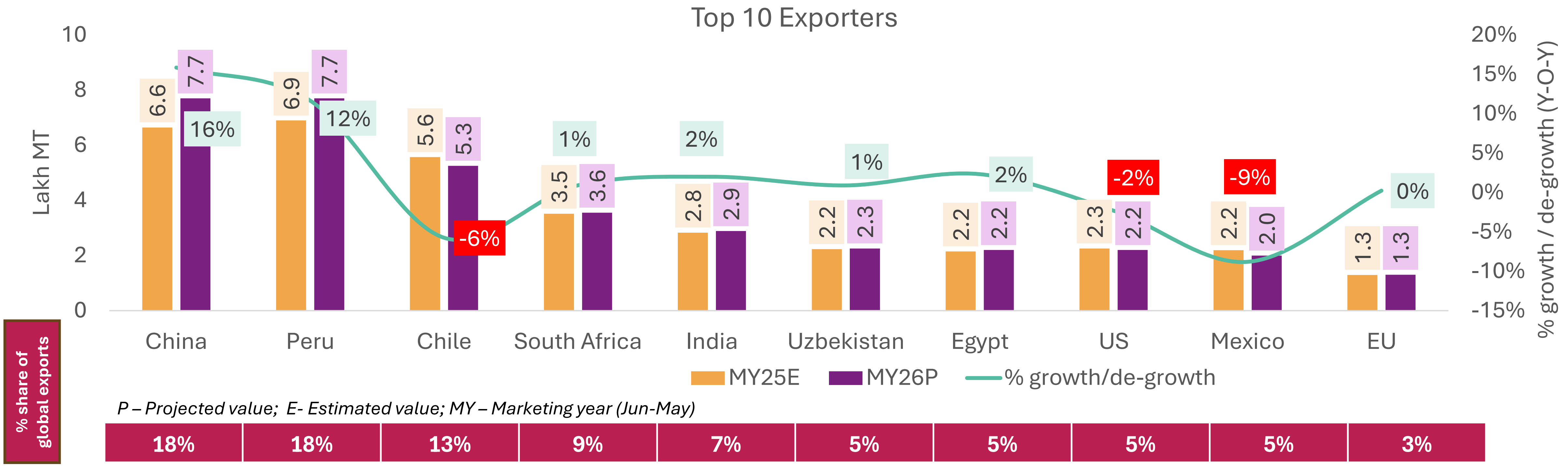
- The countries shown in the chart account for ~ **90% of global table grape production.** MY26P global production is expected to remain broadly stable to marginally higher (~0–1% increase YoY).
- **China, accounting for ~50% of global table grape production, is projected to increase production by ~5–6% in MY26P,** while most other major producing countries are expected to remain stable or register modest growth (~1–10% YoY). These gains are partially offset by declines in Turkey (~23%) and India (~10%), with Brazil's production remaining broadly stable
- **Turkey's grape production is projected to decline sharply (~23%) in MY26P** due to persistent climate shocks, including spring frost, drought, and heat stress, which have weakened vine health and reduced productivity.
- **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*

Note: Growth rates are calculated using unrounded production values

Export Trends and Price Outlook

Major Exporters of Grapes



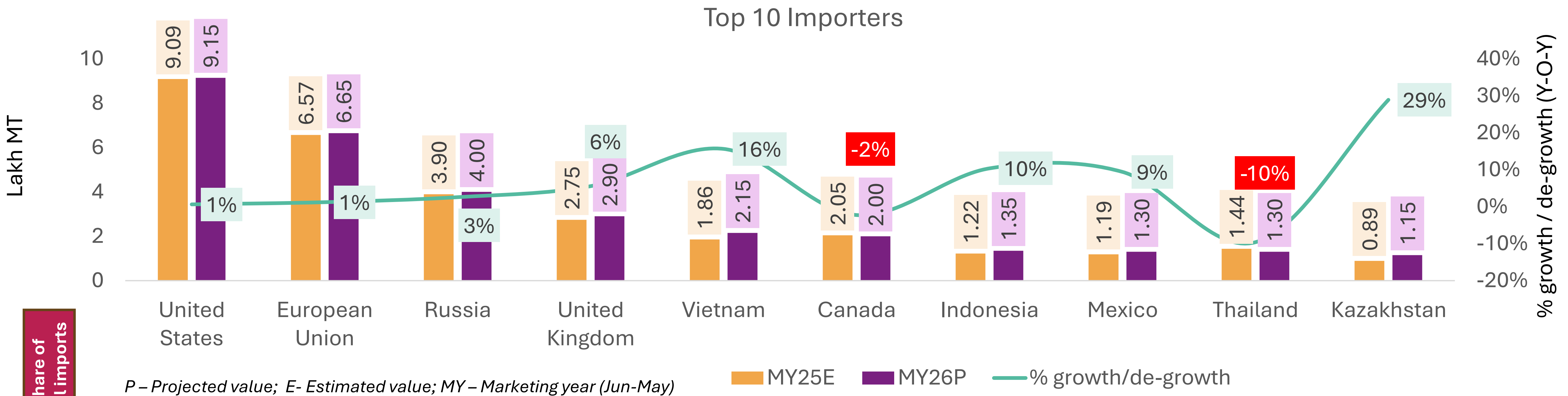
- The countries shown in the chart collectively account for **~90% of global table grape exports.**
- **Global grape exports in MY26P are expected to rise ~3–4%,** driven by strong growth in China and Peru, supported by improved logistics, cold chain infrastructure, and regional demand. However, adverse weather, rising costs, and higher domestic consumption are likely to constrain exports from Chile and Mexico, moderating overall trade.
- **China's**[1] grape exports are projected to **increase ~15–16%** in **MY26P**, supported by higher exportable surplus from increased production and strong import demand across Southeast Asia. Approximately 87% of China's grape exports are destined for Southeast Asia.
- **India's**[2] grape export growth is projected to be **capped at ~2%** in **MY26P** due to **disruption of ~16000 tonnes** of Gulf-bound shipments due to **West Asian conflicts**. Export prospects are further constrained by **JNPA clearance delays**, **weaker realizations**, competition from **Peru**, **Chile**, **South Africa** and **Egypt**, and lower-priced **Turkish grapes** in **Russia (~USD 870/MT, nearly 50% below Indian export prices).**

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

Note: Growth rates are calculated using unrounded actual export values

JNPA: Jawaharlal Nehru Port Authority

Major Importers of Grapes



P – Projected value; E- Estimated value; MY – Marketing year (Jun-May)

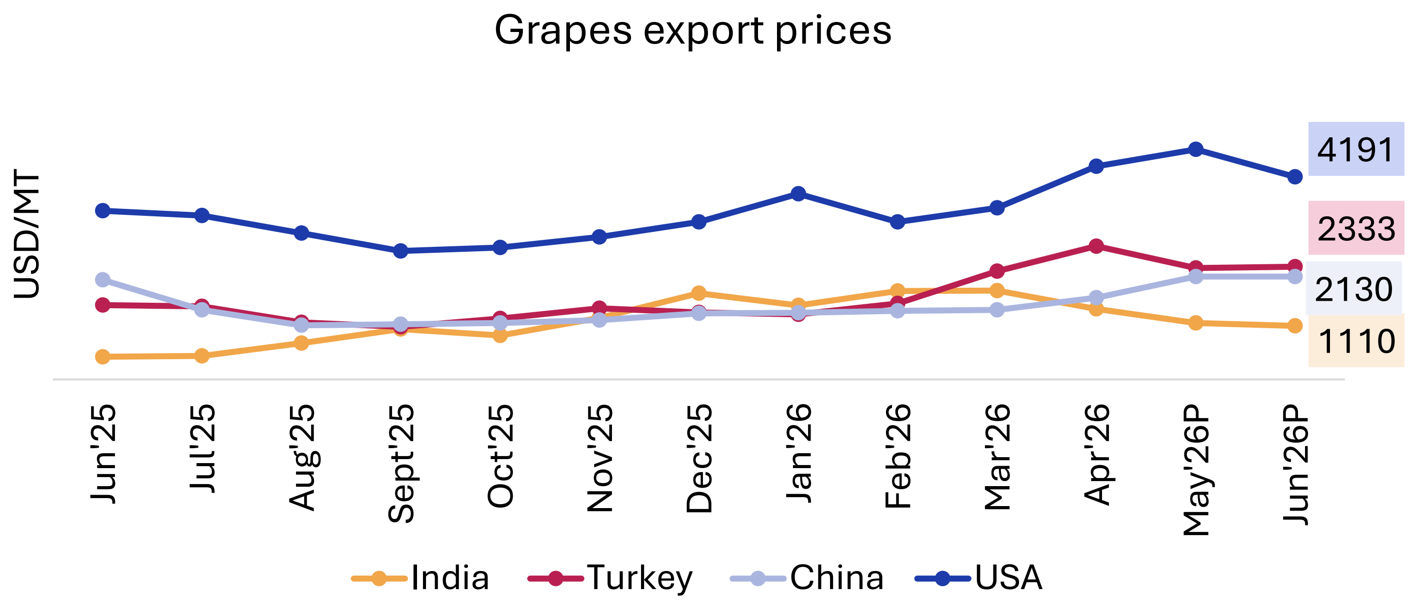
% share of global imports	United States	European Union	Russia	United Kingdom	Vietnam	Canada	Indonesia	Mexico	Thailand	Kazakhstan
	23%	**17%**	**10%**	**7%**	**5%**	**5%**	**3%**	**3%**	**3%**	**3%**

- **The countries covered in the chart account for ~80% of global table grape imports**. Imports grew strongly between MY20 and MY25E, led by Southeast Asia (5–11% CAGR), followed by Bangladesh (~8%) and both Russia and the EU (~6%).
- **Vietnam's**[1] grape imports are projected **to rise ~16% YoY to 2.15 lakh MT**, driven by increasing fruit consumption, retail channel expansion and improved availability from Peru and other Southern Hemisphere suppliers.
- **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**.
- **Russia's**[3] grape imports are **expected to increase by ~3% in MY26P**, supported by stable domestic demand and diversified sourcing from Turkey, Uzbekistan, Egypt and India. Restrictions on Armenian shipments are expected to have a limited impact as Armenia contributes less than 1% of total imports..

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; 3. Russia Imports

Note: Growth rates are calculated using unrounded actual import values

Export Prices Forecast for Grapes



	Price outlook for next quarter (JAS)*				
Countries	June'26 P Price (USD/MT)	June'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JAS (USD/MT)
India	1110	470	**136%**	**Bullish**	1470-1530
Turkey	2333	1540	**51%**	**Sideways**	2290-2350
China	2130	2060	**3%**	**Bearish**	1870-1930
USA	4191	3490	**20%**	**Sideways**	4170-4230

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

- **India's grape export prices are expected to rise sharply by ~30–40% during JAS'26**, driven by limited availability of export-grade grapes following the completion of the harvest season in April. Prices are expected to rise to ~USD 1,470–1,530/MT in JAS'26 before easing with fresh harvest arrivals from China and Turkey during August–October.

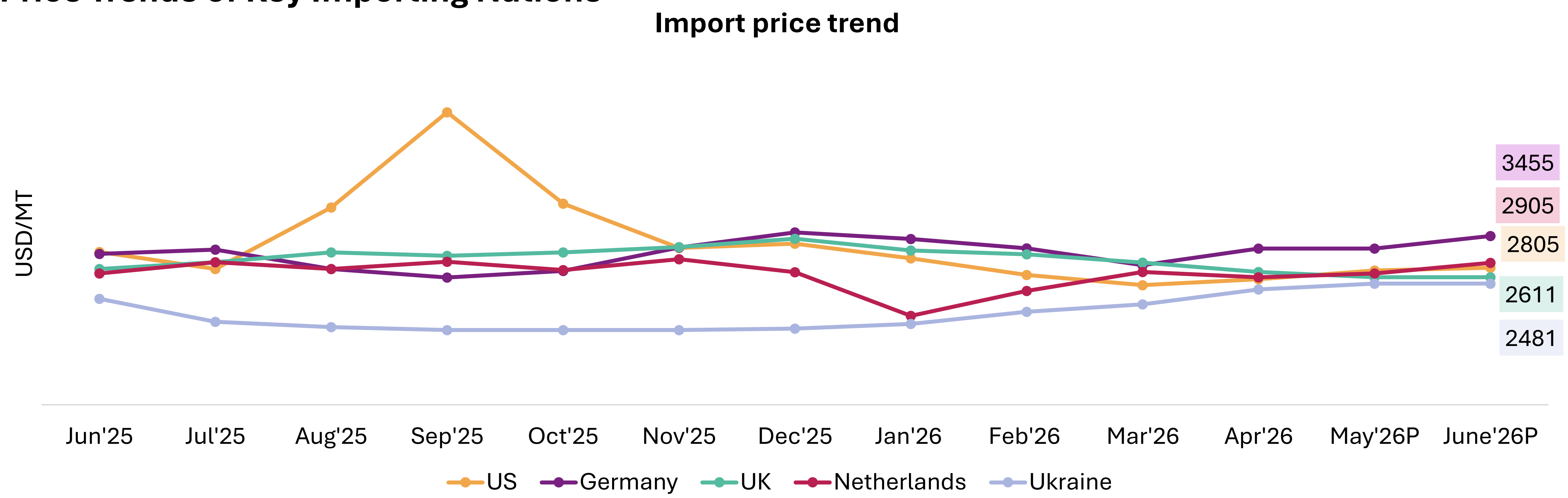
- **China's table grape prices are expected to remain under pressure in the upcoming quarter,** driven by record domestic production of ~15 MMT in MY26P, which is likely to result in ample supply. Additionally, the continued dominance of the low-cost Shine Muscat variety in Southeast Asian markets is expected to keep export realizations subdued.

- **Turkey's grape export prices rose ~51% YoY in June'26** due to drought and spring frost, which reduced production by ~23%. With supplies remaining tight, prices are expected to stay rangebound at ~USD 2,290–2,350/MT in the coming quarter.

- **U.S. grape export prices are expected to remain stable in JAS'26P,** as higher availability from the early California harvest is likely to balance steady export demand, keeping prices broadly rangebound at ~USD 4,170–4,230/MT.

Note: Price forecasting is based on the fundamental analysis. JAS stands for July, August and September 2026.

Price Trends of Key Importing Nations



- **U.S.** grape import prices are anticipated to **increase by ~1–2% MoM in June'26P**, as lower arrivals from **Peru, Chile, and Mexico** tighten near-term availability and reduce inventory buffers.
- **Germany's** grape import prices are expected to **increase to ~USD 3,450–3,460/MT in June'26P**, supported by seasonally lower Southern Hemisphere supplies, firm EU demand, and elevated import costs, which are likely to keep prices high.
- **Netherlands'** grape import prices are projected to **rise to ~USD 2,900–2,910/MT in June'26P**, as lower arrivals from **Peru and South Africa** tighten supply, while distributor restocking ahead of the seasonal gap adds upward pressure.
- **Ukraine's** grape import prices are estimated to have remained **largely stable at ~USD 2,480–2,490/MT in June'26P**, continuing the recovery from mid-2025 lows amid improving import availability and steady domestic demand.

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

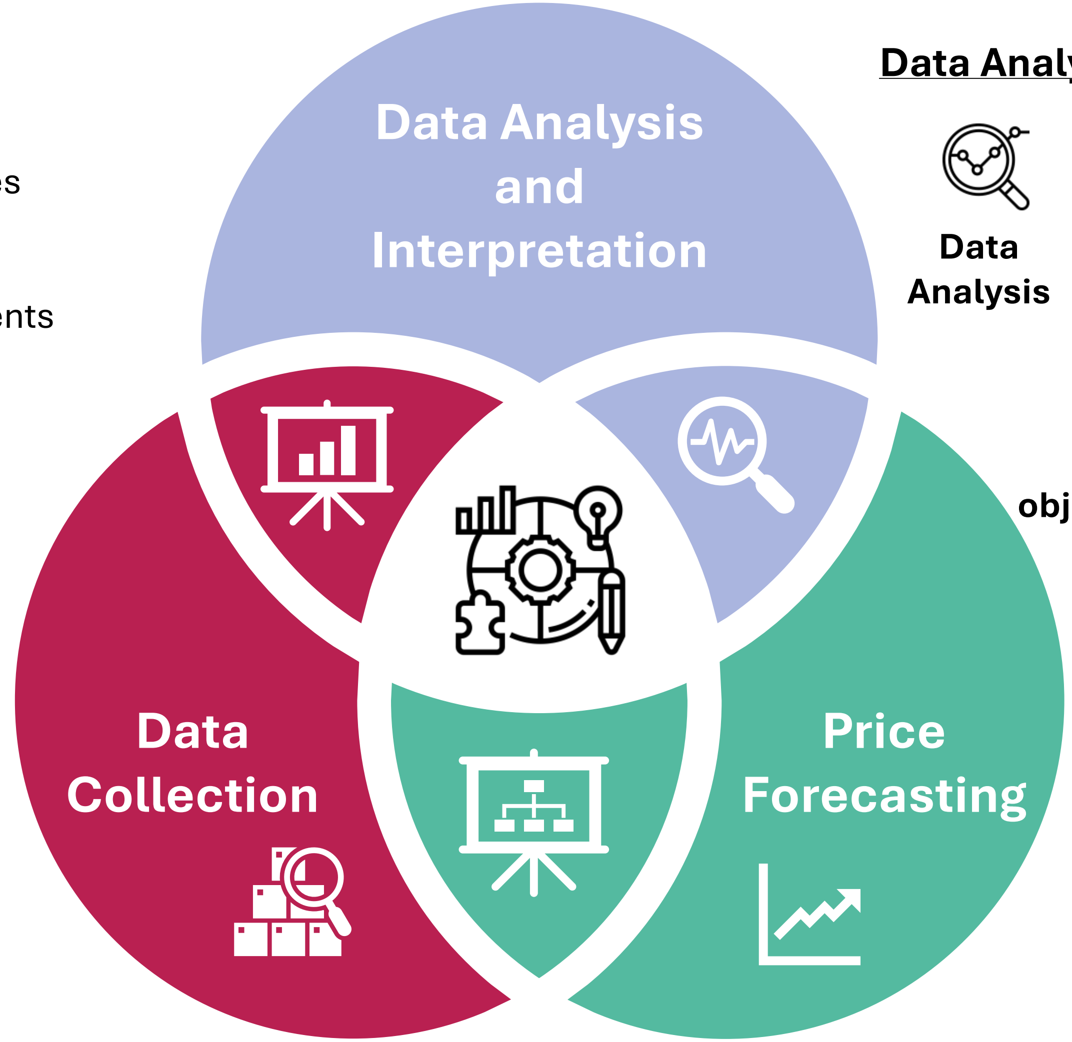
Data Collection

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.