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**Report Name:** Fresh Deciduous Fruit Annual

**Country:** India

**Post:** New Delhi

**Report Category:** Fresh Deciduous Fruit

**Prepared By:** Radha Mani, Agricultural Specialist

**Approved By:** Joanna Brown, Agricultural Attaché

**Report Highlights:**

India's domestic apple production in marketing year (MY) 2024/2025 is forecast 6 percent higher at 2.55 million metric tons (MMT) due to favorable weather conditions in the apple growing regions. Post forecasts a 10 percent increase in MY 2024/2025 apple imports at 600 thousand metric tons due to the growing demand for higher quality apples. For MY 2024/2025, India's pear production is forecast marginally higher at 313 thousand (MT), as the lack of integrated cold chain infrastructure limits growth in pear production. MY 2024/2025 grape production is anticipated to increase by four percent at 3.06 MMT owing to improved farming practices.

## COMMODITIES

### APPLES, FRESH

**Table 1: India, Commodity, Apples, Fresh, Production, Supply and Distribution (PSD)**

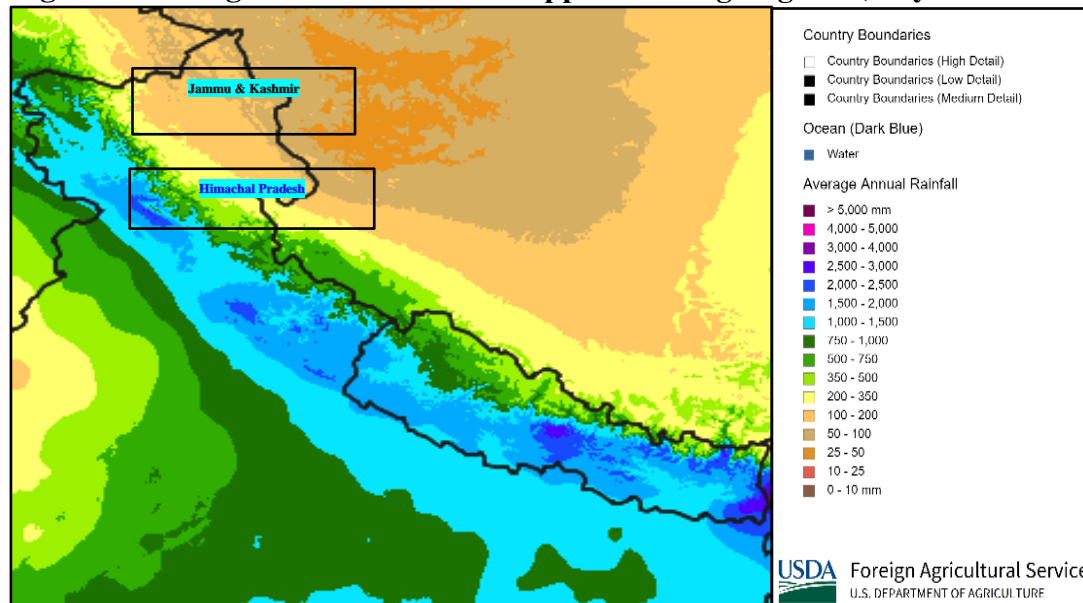
<b>Apples, Fresh</b>	<b>2022/2023</b>		<b>2023/2024</b>		<b>2024/2025</b>	
<b>Market Year Begins</b>	<b>Jul 2022</b>		<b>Jul 2023</b>		<b>Jul 2024</b>	
<b>India</b>	<b>USDA</b>	<b>New Post</b>	<b>USDA</b>	<b>New Post</b>	<b>USDA</b>	<b>New Post</b>
<b>Area Planted (HA)</b>	326000	326000	326000	326000	0	326000
<b>Area Harvested (HA)</b>	278000	278000	278000	278000	0	278000
<b>Bearing Trees (1000 TREES)</b>	80000	80000	80000	80000	0	80000
<b>Non-Bearing Trees (1000 TREES)</b>	12000	12000	11550	11550	0	11550
<b>Total Trees (1000 TREES)</b>	92000	92000	91550	91550	0	91550
<b>Commercial Production (MT)</b>	2400000	2400000	2410000	2410000	0	2550000
<b>Non-Comm. Production (MT)</b>	0	0	0	0	0	0
<b>Production (MT)</b>	2400000	2400000	2410000	2410000	0	2550000
<b>Imports (MT)</b>	360000	359970	510000	544025	0	600000
<b>Total Supply (MT)</b>	2760000	2759970	2920000	2954025	0	3150000
<b>Domestic Consumption (MT)</b>	2550010	2552080	2764000	2796340	0	2979000
<b>Exports (MT)</b>	53000	50900	20000	21385	0	25000
<b>Withdrawal From Market (MT)</b>	156990	156990	136000	136300	0	146000
<b>Total Distribution (MT)</b>	2760000	2759970	2920000	2954025	0	3150000

Data Source: FAS New Delhi historical data series; forecast for 2024/2025, estimates for 2023/2024, and 2022/2023.

#### AREA AND PRODUCTION

For marketing year (MY) 2024/25, FAS New Delhi forecasts India's apple production higher at 2.55 million metric tons (MMT). This is nearly a six percent increase from the MY 2023/24 estimate. Despite the trend of growers keeping old trees that has resulted in an average 85 percent of area planted yielding a suitable harvest, this year's short winter and limited rainfall during the flowering and fruit-setting stages supported quality production in the country's apple growing regions. (See, Figure 1 for average rainfall in the States of Jammu and Kashmir and Himachal Pradesh).

**Figure 1. Average Rainfall in India's Apple Growing Regions (May – October 2024)**



Source: Global Agricultural & Disaster Assessment System & FAS New Delhi Research

**India's Apple Production Constraints:** Jammu and Kashmir, India's northern territory (bordering Pakistan and the territory of Ladakh), is the country's dominant apple producer. It accounts for approximately 70 percent of all domestic production, while the state of Himachal Pradesh, just to the south of it, represents nearly 20 percent of overall production. Apple orchards in these regions largely consist of the *Red Delicious*, *Golden Delicious*, *Ambri*, *McIntosh*, *Granny Smith*, and *Rich Red* varieties. A few other states — Uttarakhand, Arunachal Pradesh, Nagaland, and Sikkim — together produce the remaining 10 percent.

Despite the various states producing apples, there are multiple factors limiting domestic value chain growth including insufficient cold chain and poor local road infrastructure. Specifically, apples produced domestically often cannot travel long distances to markets across India due to limited investment in refrigerated transportation and storage facilities.

**Limits of Government Intervention:** Since the subject of agriculture is normally managed at the state level, Jammu and Kashmir maintains a Market Intervention Scheme (MIS), which is a state-led apple procurement program.<sup>1</sup> However, it is managed by the National Agricultural Cooperative Marketing Federation and due to its bureaucratically complex system, it is rarely utilized by farmers. Further, the growers often forgo the program due to their ability to obtain higher prices above the MIS rate. For example, some private companies— Devbhumi, Reliance, and Adani Agri Fresh (Farm Pik)—procure directly from farmers offering remunerative prices. These companies operate their warehouses and pricing schemes independently of government-controlled market yards.<sup>2</sup>

<sup>1</sup> See, Government of Jammu and Kashmir, Department of Horticulture, "[Market Intervention Scheme for Apples of Jammu and Kashmir](#)," Government Order No. 77 – JK (Horti) of 2020 (11-11-2020).

<sup>2</sup> See, [Tribune India](#), "Adani Agri Fresh Increases Apple Procurement Prices."

## CONSUMPTION

For MY 2024/2025, Post forecasts apple consumption higher by seven percent at 2.9 MMT, mainly attributable to the growth in population with higher incomes that are spending more on healthy and fresh foods. Similarly, Post is revising its MY 2023/2024 estimates higher to 2.8 MT on account of an expansion in consumer base.

**India’s Growing Appetite for Fresh Apples:** Indian demand for fresh apples continues to grow thanks to consumers perception of the fruit’s positive health benefits. Indians generally consider apples as healthier than other fruits. Approximately 60 percent of apples are consumed fresh, while the remaining 40 percent that uses lower quality fruit, goes to further processing in the form of sauces, juices, and food ingredients. In the imported fresh fruit category, apples are heavily consumed, with consistent, year-round sales. Demand often outpaces availability. Overall, the factors fueling apple demand include a growing youthful population, higher disposable incomes, improved health awareness, and year-round market availability.<sup>3</sup>

**India’s Traditional and Modern Apple Retail Sector:** Marketing of domestic produce occurs primarily through the traditional retail sector (i.e., unorganized fruit and vegetable vendors, pushcarts, and farmer’s markets). At the same time, modern retail outlets are slowly increasing their market share. Domestically produced apples are mix-grade and primarily consumed in northern India urban areas due to limited cold chain infrastructure. All other Indian regions routinely confront distribution challenges for this desirable, but highly perishable fruit. To fill the demand, the regions outside northern India rely on apple imports throughout the year. As a result, imported apples enjoy a separate market compared to domestic production. Imported apples usually have better shelf life, quality, and command a higher price. However, ensuring quality throughout the entire apple value chain, especially in smaller cities, remains a challenge due to limited refrigerated space and high energy costs.

## TRADE

**Imports:** For MY 2024/2025, Post projects apple imports at 600 thousand metric tons (MT), up by ten percent from the previous MY 2023/2024. Based on the latest trade data, imports are revised to 544 thousand MT and 360 thousand MT for MY’s 2023/2024 and 2022/2023, respectively. India’s removal of the 2019 retaliatory tariffs in September 2023 strongly boosted U.S. origin apple exports to India (See, Table 2).

**Table 2. India: Apples, Fresh, Imports, MY 2021/2022-2023/2024 (MT)**

Country	2021/22	2022/23	2023/24	Change %
World	447,938	359,968	544,024	51
Iran	102,014	78,771	138,774	76
Turkey	114,486	114,027	123,213	8
South Africa	17,013	20,633	39,249	90
Poland	17,076	32,084	38,511	20
United States	10,390	1,857	37,246	1905

<sup>3</sup> The Indian population’s median age is approximately 29.8 years of age (males 29 years, females 30.5 years). The national population continues to grow at about 0.7 percent ([Central Intelligence Agency, 2024 estimate](#)).

Data Source: Trade Data Monitor and FAS New Delhi research.

On account of its shorter transit time to India and attractive import price, Iran commands a 26 percent market share for apples in comparison to Turkey which is in the second place with a market share of 23 percent. South Africa and Poland with 7 percent and United States with 6.8 percent follow in third, fourth, and fifth place respectively.

**Import Barriers:** There is a Food Safety and Standards Authority of India’s (FSSAI) requirement that imported apples must be accompanied by a certificate stating that the product does not contain genetically modified (GM) organisms and is not of GM-origin. This requirement poses a challenge and impacts the U.S. apple trade and that of other origins.<sup>4</sup>

**Iranian Apples:** India’s apple industry asserts that Iranian apples are imported into India as Afghanistan-origin to avoid import duties via the Afghanistan-India free trade agreement.<sup>5</sup> Himachal Pradesh and Kashmir producer groups have made several requests to the Indian government to ban Iranian apples that are arriving under Afghani relabeling.<sup>6</sup>

On May 8, 2023, the Indian Ministry of Commerce and Industry’s Directorate General of Foreign Trade published [Notification No. 5/2023](#). The amended import policy bans the import of apples if the cost, insurance, and freight (CIF) import value is less than or equal to Indian rupees (INR) 50 per kilogram (kg). If the CIF value is above INR 50 per kilogram, the import is “Free.” The notification, however, exempts Bhutan from the minimum import price conditions. The Indian government’s revised import policy is a significant step in combatting the under invoicing of imported apples. The measure impacts shipments of lower value, unsorted (mixed) Iranian and Afghani apples.<sup>7</sup>

Post trade sources confirm that the wholesale and retail prices for different varieties of apples imported from various origins in the month of September 2024, are as provided in Table 3.

**Table 3: India, Apples, Fresh, Imports, Wholesale and Retail Prices, Sept. 2024 (INR/Kg)**

Origin	Varieties	Price per Kilogram in INR (Wholesale Market)	Price per Kilogram in U.S. Dollars (Wholesale Market)	Price per Kg in INR (Retail Market)	Price per Kilogram in U.S. Dollars (Retail Market)
United States (Washington state)	Red Delicious	200-220	2.38-2.61	300-320	3.57-3.80
United States (Washington state)	Gala	220-240	2.61-2.85	320-340	3.80-4.04
United States	Fuji	220-240	2.61-2.85	320-340	3.80-4.04

<sup>4</sup> See: [GAIN- INDIA | IN2021-0042 | India - Requirement of a Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments - A Workaround Solution.](#)

<sup>5</sup> See: [The Hindustan Times](#), “Cheap Iranian Imports now Threatening Stored Himachal Apples,” (January 8, 2022).

<sup>6</sup> Indian apple growers have routinely raised concerns of Iranian apples flooding the local market since at least MY 2012/2013. See, [GAIN-INDIA | IN2013-2009 I 2013 Apple Product Brief.](#)

<sup>7</sup> See, [GAIN-INDIA | IN2023-0038 | India Bans Imports of Apples with Declared CIF Values of Less than Indian Rupees 50 per Kilogram.](#)

<b>(Washington state)</b>					
<b>United States (Washington state)</b>	Granny Smith	200-220	2.38-2.61	280-300	3.33-3.57
<b>Italy</b>	Red Delicious	165-185	1.96-2.20	250-270	2.97-3.21
<b>Italy</b>	Granny Smith	185-200	2.20-2.38	280-310	3.33-3.69
<b>New Zealand</b>	Queen	220-230	2.61-2.73	300-320	3.57-3.80
<b>New Zealand</b>	Royal Gala	220-230	2.61-2.73	300-320	3.57-3.80
<b>New Zealand</b>	Red Delicious	210-220	2.5-2.61	300-320	3.57-3.80
<b>Turkey</b>	Red Delicious	180-200	2.14-2.38	280-300	3.33-3.57
<b>Turkey</b>	Granny Smith	160-180	1.90-2.14	260-280	3.09-3.33
<b>Turkey</b>	Fuji	170-190	2.02-2.26	250-270	2.97-3.21
<b>South Africa</b>	Gala	200-220	2.38-2.61	300-320	3.57-3.80
<b>Chile</b>	Gala	200-220	2.38-2.61	280-300	3.33-3.57
<b>Poland</b>	Gala	180-200	2.14-2.38	260-280	3.09-3.33
<b>Serbia</b>	Gala	170-190	2.02-2.26	250-270	2.97-3.21
<b>Iran</b>	Red Delicious	90-100	1.07-1.19	150-170	1.78-2.02
<b>China</b>	Fuji	230-240	2.73-2.85	320-340	3.80-4.04

Note: Exchange rate: One U.S. Dollar = 84 Indian rupees (as of October 10, 2024)

**Exports:** For MY 2024/2025, India's apple exports are forecast higher at 25 thousand MT, up by 17 percent on expectations of higher supplies and demand from export markets due to better quality of apple crop in comparison with MY 2023/2024. Post is revising its earlier MY 2023/2024 and MY 2022/2023 estimates to 21 thousand MT and 51 thousand MT respectively based on the latest trade data. (Table 4).

**Table 4: India, Apples, Fresh, Exports, MY 2021/2022 to 2023/2024 (MT)**

<b>Country</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>Change %</b>
World	34,522	50,901	21,382	58
Bangladesh	18,190	30,843	10,940	70
Nepal	13,107	21,180	9,754	62
Bhutan	365	642	594	76
UAE	163	148	80	-9
Saudi Arabia	24	41	0	71
Kuwait	6	21	2	250

Data Source: Trade Data Monitor.

## TRADE POLICY

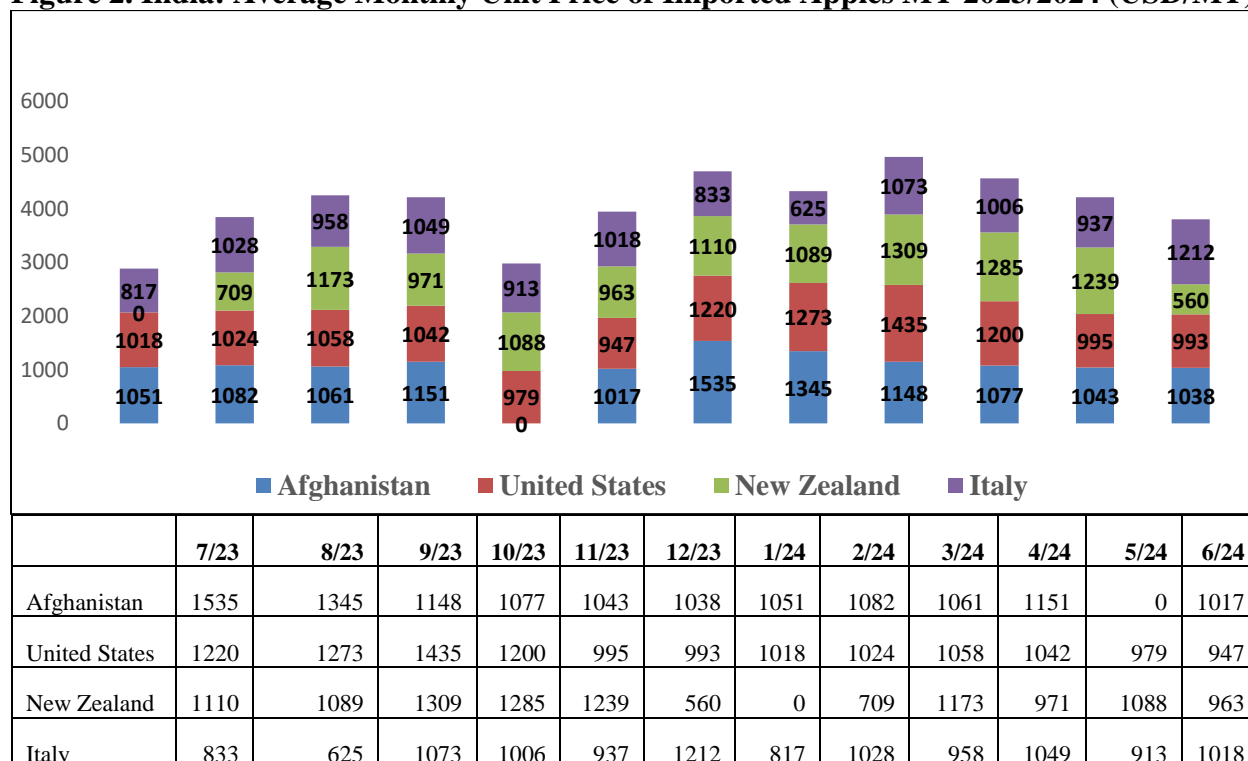
India’s apple imports (Harmonized Tariff Code – HS 0808.10) continue to face a 50 percent basic customs duty with no quantitative restrictions. U.S.-origin apples until September 2023 were subject to a combined duty of 70 percent, which included an additional 20 percent retaliatory tariff. With the removal of the retaliatory tariff, U.S. apple exports, which were most affected, are rebuilding its apple export market share in India.

Non-tariff barriers on apple exports to India continue to exist. Barriers include the Indian government’s non-GM/GM-free certificate requirement.<sup>8</sup> The United States has, however, managed to find a temporary workaround in the form of a Washington State Department of Agriculture issued certification. Exporting apples to India also requires the submission of a phytosanitary certificate to Indian Customs. The Indian government’s [Plant Quarantine Order, 2003](#) also establishes the conditions for importing planting seeds and agricultural products (including apples for consumption) into India.

## PRICE

In MY 2023/2024, the average metric ton price in U.S. dollars for imported fresh apples was as follows: Afghanistan \$1,048, United States \$1,112; New Zealand \$957; Italy \$950, South Africa \$804 and Iran \$609 (Figure 2).

**Figure 2. India: Average Monthly Unit Price of Imported Apples MY 2023/2024 (USD/MT)**



Note: \$0.00 indicates that no trade occurred during the month.

Data Source: Trade Data Monitor

<sup>8</sup> See, [GAIN-INDIA | IN2021-0042 | India – Requirement of a Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments – A Workaround Solution](#).

## COMMODITIES

### PEARS, FRESH

**Table 5. India: Commodity, Pears, Fresh, Production, Supply and Distribution (PSD)**

Pears, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jul 2022		Jul 2023		Jul 2024	
India	USDA	New Post	USDA	New Post	USDA	New Post
Area Planted (HA)	43000	43000	43000	43000	0	43000
Area Harvested (HA)	42000	42000	42000	42000	0	42000
Bearing Trees (1000 TREES)	12000	12000	12000	12000	0	12000
Non-Bearing Trees (1000)	300	300	300	300	0	300
Total Trees (1000 TREES)	12300	12300	12300	12300	0	12300
Commercial Production (MT)	300000	300000	312500	312500	0	313000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	300000	300000	312500	312500	0	313000
Imports (MT)	28000	28000	30000	30000	0	33500
Total Supply (MT)	328000	328000	342500	342500	0	346500
Domestic Consumption (MT)	327800	327815	342300	342290	0	346280
Exports (MT)	200	185	200	210	0	220
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	328000	328000	342500	342500	0	346500

Data source: FAS New Delhi historical data series; forecast for 2024/2025, estimates for 2023/2024, and 2022/2023.

### PRODUCTION

For marketing year (MY) 2024/2025, India's pear production is forecast at 313 thousand MT, marginally higher from MY 2023/2024. The primary supply chain constraint that limits the industry's ability to transport and package this sensitive fruit across long distances have limited pear production, even though weather conditions were favorable. According to industry sources, significant improvements are not anticipated in the quality of pears unless India develops a fully integrated cold chain infrastructure.

**India's Pear Production Cycle and Growing Areas:** Pear production is cyclical in nature, with yields varying by as much as 20 percent depending on climatic conditions at the time of blossom and harvest. The variety and size of the tree based on the altitude and region also determines the timing. Pear trees typically produce fruit from late summer to winter, from July to early October. The exact time depends on the variety of the fruit and the prevailing weather conditions. Pears are produced in the states of Punjab, Jammu and Kashmir, Uttar Pradesh, Uttarakhand, and Himachal Pradesh. The cultivated varieties include *Williams/Bartlett*, *Anjou*, *Pathamakh*, *Comice*, *China Pear*, and *Kashmir Nakh*. With limited local production, the growing Indian consumer demand is met through imports, which provide consumers year-round access to fresh pears.



**India’s Pear Cultivation Shortcomings:** Domestic production struggles with the issue of fruit cracking, which is a physiological disorder that affects pear production, quality, and marketability. Cracked fruits are vulnerable to fungal and bacterial infection. Fruits crack due to inadequate irrigation, environmental stresses, sun exposure, and even due to the color of packaging. Better orchard management can reduce fruit cracking.

## CONSUMPTION

Post estimates MY 2024/2025 pear consumption one percent higher at 346 thousand MT on account of the growing urban middle class consumption and an improved awareness of fresh fruits forming part of a healthier diet. Post is revising its MY 2023/2024 consumption estimates to 342 thousand MT on account of lower than anticipated pear imports. India’s imported pear market growth potential remains high in the near term, as imports are necessary to meet growing consumer demand.

**Consumer Preferences:** Pears are mainly consumed fresh, with processing at a miniscule two percent of domestic production largely due to cost. The lack of a fully integrated cold chain infrastructure and limited pear processing capabilities limits market penetration. Indian pears do not typically compete with imports as the harvest season concludes by October. U.S.-origin pears typically arrive in November and are sold through late March. The *Green Bartlett* is the preferred U.S. pear variety, due to its similarity to domestic pears. U.S. pears do compete with South African (*Packham*, *Forelle* varieties) and Chilean (*Packham*) pears.

## TRADE

**Imports:** India’s pear imports for MY 2024/2025 are forecast 12 percent higher at 34 thousand MT, as the domestic crop production is unable to meet demand. South Africa remains the year-round dominant supplier (See Table 6), accounting for 75 percent of India’s fresh pear imports due to its quality, availability of fruit and resilience to India’s price inflation.

After the Indian government imposed a ban on Chinese pear imports in May 2017, South Africa has been India’s top international supplier. In August 2022, the Indian government approved South African pears for in-transit cold treatment procedures which reduced the delivery time considerably and ensured fresh produce to India.

**Table 6. India: Pears, Fresh, Imports, MY 2021/2022-2023/2024 (MT)**

Country	2021/22	2022/23	2023/24	Change %
World	28,279	27,976	29,456	5
South Africa	25,017	25,606	22,138	-14
United Arab Emirates	466	370	913	146
Chile	661	1,339	787	-41
Argentina	830	403	202	-50
United States	544	88	178	102
Spain	0	23	19	-17

Data Source: Trade Data Monitor, FAS New Delhi office research.

**Exports:** For MY 2024/2025, Post projects small quantities of pear exports to neighboring countries at 220 MT. Export estimates of MY 2023/2024 and MY 2022/2023 are revised to 210 MT and 185 MT respectively, based on the latest updated trade data. In MY 2023/2024, exports went largely to neighboring Bhutan (200 MT) and Nepal and to the United Arab Emirates, Bahrain and Maldives.

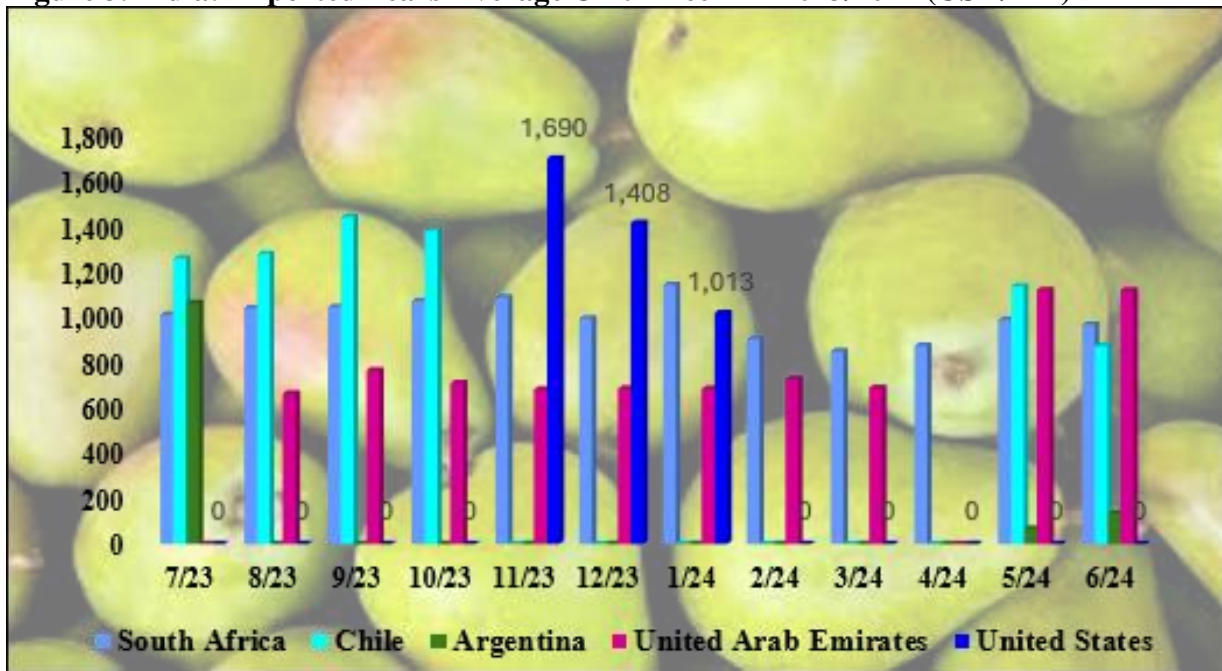
**TRADE POLICY**

The tariff duty for fresh pears (HS Code 0808.30) is 30 percent, with no quantitative restrictions. The Indian government’s [Plant Quarantine Order, 2003](#) regulates planting seeds and agricultural product imports (including that of fresh pears for consumption) into India.

**PRICE**

In MY 2023/2024, the average price for imported fresh pears from South Africa was \$992/MT, while pears from the United Arab Emirates (i.e., re-exports) came in at \$650/MT. Imports from Chile came in at \$611/MT, while U.S.-origin pears have been quoted at \$343/MT and those from Argentina at \$105/MT (Figure 3).

**Figure 3. India: Imported Pears Average Unit Price MY 2023/2024 (USD/MT)**



Note: Lack of series data indicates that no trade occurred during the month by the supplying country.

Data Source: Trade Data Monitor.

## COMMODITIES

### GRAPES, TABLE, FRESH

**Table 7. India: Commodity, Grapes, Fresh, Production, Supply and Distribution (PSD)**

Grapes, Fresh Table	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jun 2022		Jun 2023		Jun 2024	
India	USDA	New Post	USDA	New Post	USDA	New Post
Area Planted (HA)	142000	142000	142000	142000	0	142000
Area Harvested (HA)	141000	141000	141500	141500	0	142000
Commercial Production (MT)	285000	2850000	2950000	2950000	0	3068000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	285000	2850000	2950000	2950000	0	3068000
Imports (MT)	12200	12156	20000	18500	0	20000
Total Supply (MT)	286220	2862156	2970000	2968500	0	3088000
Fresh Dom. Consumption (MT)	225440	2254371	2320000	2325795	0	2413000
Exports (MT)	282800	282785	335000	312705	0	335000
Withdrawal From Market (MT)	325000	325000	315000	330000	0	340000
Total Distribution (MT)	286220	2862156	2970000	2968500	0	3088000

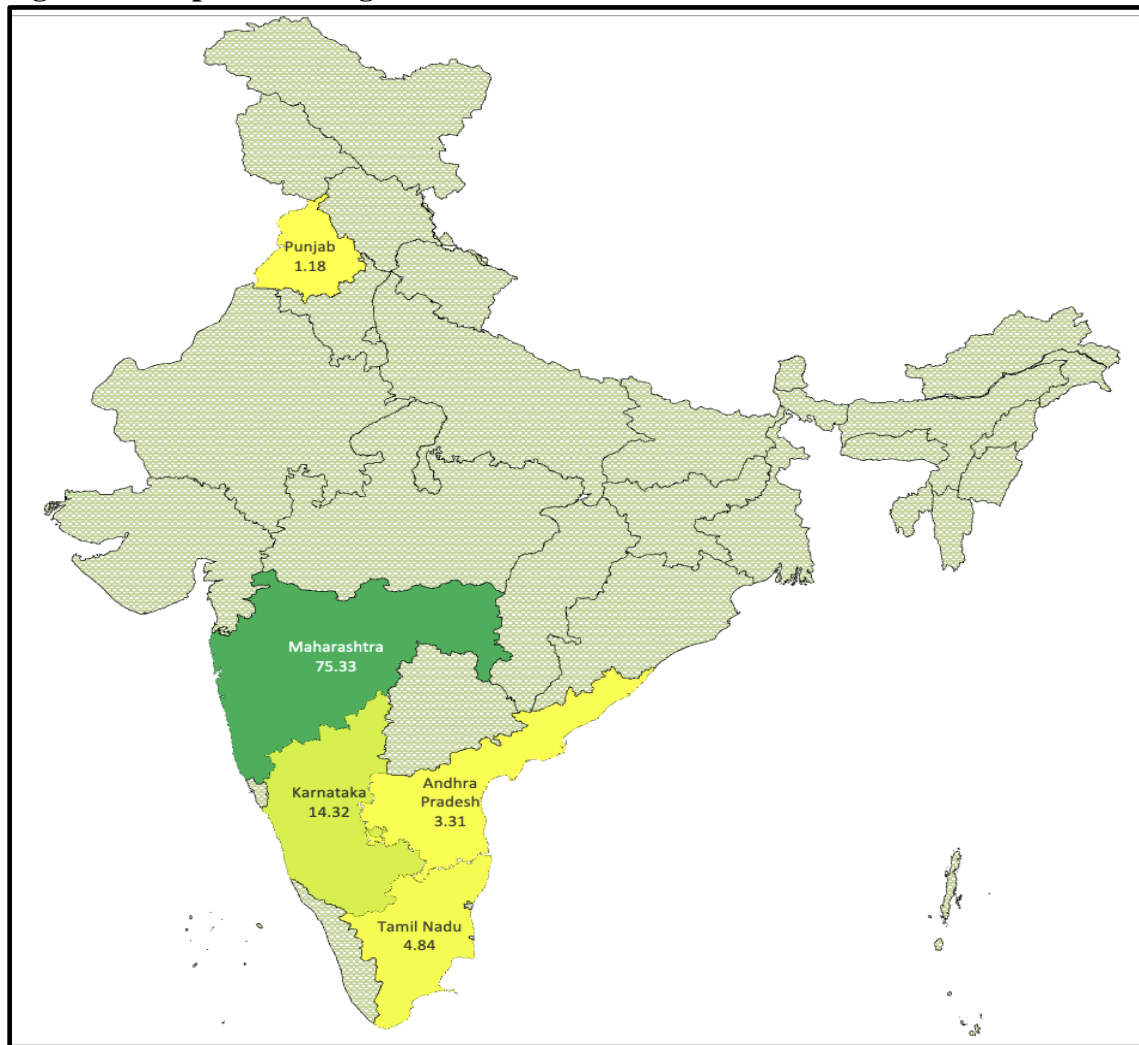
Data Source: FAS New Delhi historical data series; forecast for 2024/2025, estimates for 2023/2024, and 2022/2023.

### PRODUCTION

India's fresh table grape production for MY 2024/2025 is forecast four percent higher than MY 2023/24 at 3.06 MMT. This is due to adequate soil moisture resulting from the good monsoon in 2024 and improved adoption of advanced farming techniques to maintain internationally accepted grape standards. Assuming normal weather, industry sources anticipate better grape production during the February-April harvest period compared to MY 2023/2024.

**India's Grapes Production Country:** The Indian state of Maharashtra is the country's leading grape producer, accounting for 75 percent of total domestic production. Maharashtra's high production volume is supported by drip irrigation infrastructure where there are more than 20 grape varieties under cultivation. Grape production also extends to the Indian states of Karnataka (14 percent), Tamil Nadu (5 percent), Andhra Pradesh (3 percent), and Punjab (one percent) (see, Figure 5). *Thompson Seedless (Sultana)* is the prominent grape variety, accounting for 55 percent of total cultivated area. *Bangalore Blue (Paneer)*, *Anab-e-Shahi*, and *Dilkhush* varieties each account for approximately 15 percent, respectively. *Sultana* and *Sonaka* are also common varieties for raisin production.

**Figure 4: Grape Producing States in India**



Source: Agmarknet and FAS India research

While 71 percent of the production is used as fresh grapes, nearly 27 percent is dried for raisin production. Facing insufficient cold chain transport and infrastructure, producers are turning to raisin production due to high demand in both domestic and exports markets.<sup>9</sup> The shift to raisin production fluctuates between nine to 20 percent based on domestic table grape prices.

### **Consumption**

India's MY 2024/2025 table grape consumption is forecast nearly four percent higher at 2.4 MMT. Major factors driving increased consumption include expanding middle class, greater disposable incomes, rising health awareness for eating fresh fruit, as well as consumption of processed products such as raisins, juices, and jams. MY 2023/2024 and MY 2022/2023 consumption numbers are revised lower to 2.3 MMT and 2.2 MMT to reflect market supplies.

<sup>9</sup> The raisin industry is mostly confined to the Sangli, Solapur, and Nasik districts of Maharashtra, which utilizes lesser-quality, thin-skinned grapes for production. India in MY 2021/2022 imported 29,300 MT of raisins, mostly from Afghanistan, but simultaneously exported 22,100 MT during the same period.

Table grapes use in Indian wine production has been a demand driver this decade. Market sources forecast India’s wine market to increase by \$1.89 billion at a compound annual growth rate (CAGR) of 48 percent between 2024 and 2028.<sup>10</sup> The wine market is driven by several key trends, the most prominent being the use of online shopping with e-commerce platforms. The consumers are embracing the convenience of buying online, as it offers them a broader selection of wines, competitive pricing, and home delivery. However, a complex regulatory environment is a huge challenge as there are different laws and regulations governing the sale and distribution across different Indian states.

## TRADE

**Imports:** FAS New Delhi forecasts India’s MY 2024/2025 grape import to rise to 20,000 MT. Imports are needed to fill consumer demand during months of limited domestic supply. By volume, China remains India’s main supplier (66 percent) followed by Afghanistan (17 percent), and Chile (7 percent) (see, Table 8).

**Table 8. India: Table Grape Imports, MY 2019/2020-2021/2022 (MT)**

Country	2020/21	2021/22	2022/23	Market Share
World	6,589	7,915	12,156	
China	4,305	5,547	8,036	66
Afghanistan	949	1,521	2,087	17
Chile	283	512	741	7
Egypt	338	34	508	4
United Arab Emirates	62	7	262	2
Australia	208	73	205	2
South Africa	0	63	127	1
Peru	168	19	116	<1
United States	235	8	16	<1

Data Source: Trade Data Monitor.

**Exports:** India is a major exporter of fresh table grapes. Post forecasts MY 2024/2025 grape exports higher by seven percent at 335 thousand MT, due to the expectation of higher production and rising demand from export markets. Based on the latest trade data, MY 2023/2024 export estimate is revised higher at 312 thousand MT. With the Indian rupee’s depreciation, local growers are getting better returns from their export markets in comparison to that from the domestic market. India exported approximately 312 thousand MT of table grapes in MY 2023/2024 (Table 9). By volume, nearly 35 percent of grape exports went to Netherlands and 23 percent to neighboring Bangladesh.

<sup>10</sup> See, [Technavio](#), “India Wine Market Analysis – Size and Forecast-2024-2028.”

**Table 9. India: Table Grape Exports, MY 2021/2022-2023/2024(MT)**

Country	2021/22	2022/23	2023/24	Market Share
World	2,75,110	2,82,785	3,12,705	100
Netherlands	77,757	78,769	1,09,743	35
Bangladesh	88,721	70,673	72,976	23
Nepal	18,394	25,449	19,424	6
United Arab Emirates	17,970	19,663	26,036	8
United Kingdom	13,458	14,920	15,632	5
Russia	16,463	13,564	22,547	7

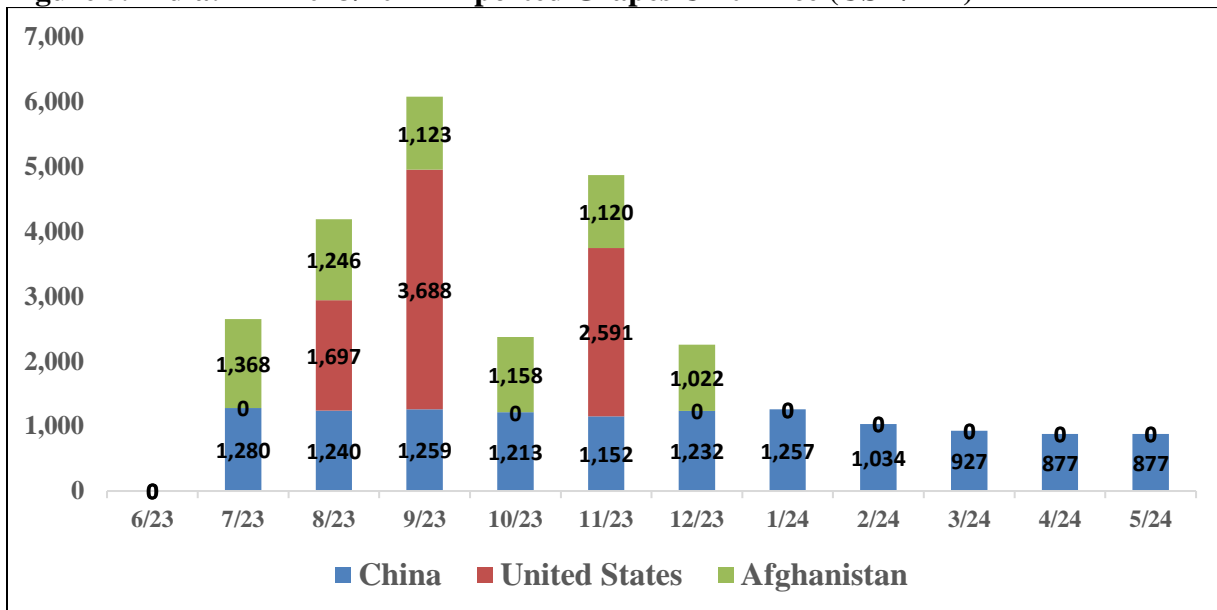
Data Source: Trade Data Monitor.

### TRADE POLICY

There are no quantitative restrictions on fresh grapes (HS Code 0806.10) imports. However, fresh grapes are assessed a 30 percent basic customs duty. Grape imports require a phytosanitary certificate to be presented to Indian Customs during import clearance procedures. The Indian government’s [Plant Quarantine Order, 2003](#) regulates the import of planting seeds and agricultural products (including fresh grapes for consumption) into India.

### PRICES

**Figure 5. India: MY 2023/2024 Imported Grapes Unit Price (USD/MT)**



Note: Lack of series data indicates that no trade occurred during the month by the supplying country.

Data Source: Trade Data Monitor.

Imported grapes are mostly found in brick-and-mortar retail stores and are targeted to more affluent consumers. Indian domestic grapes, however, are more widely available in traditional markets and with pushcart vendors.

Imported grapes are typically sold in India from July to December. In MY 2022/2023, Chinese-origin grapes command the highest price premium, averaging \$1,029/MT. On the other hand, U.S.-origin grapes have been coming in at around \$665/MT, while Afghanistan grapes registered at \$586/MT.

**Attachments:**

No Attachments