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Report Highlights:

India's fresh fruit market is experiencing strong growth, particularly for apples, pears, and grapes, driven by rising demand for premium and diverse varieties, both domestic and imported. The apple market benefits from healthy domestic production while maintaining significant demand for high-quality imports that command premium prices. The pear market, though smaller, is expanding, with imports offering premium options unavailable locally. India's grape market is robust, supported by substantial domestic production, though favorable weather conditions are critical for sustained growth. Imported grape varieties also continue to attract consumer interest.

COMMODITIES

APPLES, FRESH

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

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	326000	326000	326000	326000	0	326000
Area Harvested (HA)	278000	278000	278000	278000	0	278000
Bearing Trees (1000 TREES)	80000	80000	80000	80000	0	80000
Non-Bearing Trees (1000 TREES)	11550	11550	11550	11550	0	11550
Total Trees (1000 TREES)	91550	91550	91550	91550	0	91550
Commercial Production (MT)	2410000	2410000	2550000	2550000	0	2605000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	2410000	2410000	2550000	2550000	0	2605000
Imports (MT)	544000	544025	600000	510930	0	643000
Total Supply (MT)	2954000	2954025	3150000	3060930	0	3248000
Domestic Consumption (MT)	2796000	2796000	2979000	2880900	0	3065500
Exports (MT)	21700	21739	25000	34030	0	36000
Withdrawal From Market (MT)	136300	136286	146000	146000	0	146500
Total Distribution (MT)	2954000	2954025	3150000	3060930	0	3248000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data Source: FAS New Delhi historical data series; forecast for 2025/2026, estimates for 2024/2025, and 2023/2024.

AREA AND PRODUCTION

For marketing year (MY) 2025/26, FAS New Delhi (Post) forecasts India's apple production at 2.61 million metric tons (MMT), a two percent increase in comparison to MY 2024/25 estimates. With acreage unchanged, this year's weather conditions from flowering through harvest have been favorable compared to last year supporting higher yields. Unusual excessive rains and consequent landslides during August to September in Jammu and Kashmir and Himachal Pradesh have resulted in premature leaf fall causing reduced fruit size; logistical challenges resulted in higher withdrawal of apples from the market.

Apple Growing Regions: 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* varietals. A few other states — Uttarakhand, Arunachal Pradesh, Nagaland, and Sikkim — together produce the remaining 10 percent.

Apple Production Constraints:

Indian apple producers face significant challenges as harvest season coincides with the monsoon season. Additional hurdles include market instability, infrastructural bottlenecks, rising input costs, competition from imports, post-harvest losses and logistical failures. Most apple-producing regions are located in remote, mountainous areas, limiting small-scale farmers' access to markets. The perishable nature of apples, combined with inadequate roads, transportation infrastructure, and cold storage facilities, often leads to post-harvest losses.

Limits of Government Intervention: Agriculture in India is primarily managed at the state level, and the States of Jammu and Kashmir and Himachal Pradesh operate a Market Intervention Scheme (MIS), a state-led apple procurement program.[1] While the program is managed by the National Agricultural Cooperative Marketing Federation, its bureaucratic complexity often creates challenges, making it difficult for growers to access reliable support despite the cooperative's intended purpose. In contrast, some private players have established independent warehouses and pricing schemes, leveraging modern infrastructure such as cold storage facilities. These companies bypass traditional wholesale markets (Mandis) and their chain of commission agents, offering better prices for premium apples. However, their stringent grading systems—based on factors like size and color—result in very high prices for top-quality produce, while apples with minor blemishes are priced significantly lower.

CONSUMPTION

For MY 2025/2026, Post forecasts apple consumption to rise by three percent, reaching 3.1 MMT. The upward trend is driven by rising disposable incomes, increased health consciousness, and the year-round availability of both domestic and imported apple varieties. Additionally, the market is benefitting from a growing demand for processed apple products, such as juices, jams, and dried fruit. Post has revised MY 2024/2025 consumption estimates downward to 2.88 MMT from the previous estimate of 2.98 MMT owing to lower imports.

Growing Appetite for Fresh Apples: Approximately 60 percent of apples are consumed fresh, while the remaining 40 percent – typically lower-quality fruit—is processed into products such as sauces, jams, juices and food ingredients. The rise of e-commerce platforms and organized retail has made it easier for consumers to buy fresh apples, including premium imported varieties. While domestic production meets part of the demand, it often falls short, necessitating imports to bridge the gap. Imported apples, known for their superior shelf life and quality, command higher prices. However, maintaining quality across the apple value chain remains a challenge, particularly in smaller cities, due to limited refrigerated storage, high costs, and logistical complexities in serving a dispersed customer base.

TRADE

Imports: For MY 2025/2026, apple imports are forecast to rise by seven percent on expected growing domestic demand, reaching 643 thousand metric tons (TMT). Post has revised MY 2024/2025 and MY

[1] The Market Intervention Scheme (MIS) for apples in Jammu and Kashmir and Himachal Pradesh is an ad-hoc price support mechanism to protect growers from distress sales. It is designed to provide a remunerative price, and act as a crucial safety net for growers. It primarily targets lower-grade apples used for processing, which might not find a buyer in the open market or would fetch very low rates.

2023/2024 estimates to 510,930 MT and 544,025 MT respectively based on the latest trade data. Table 2 provides a comparative overview of India's fresh apple imports from global markets over the past three years (2023–2025).

Table 2. India: Apples, Fresh, Imports, MY 2022/2023-2024/2025 (MT)				
Country	**2022/23**	**2023/24**	**2024/25**	**Market Share (%)**
World	359968	544024	510930	--
Iran	78771	138774	138994	27
Turkey	114027	123213	94956	19
Afghanistan	1696	37937	49886	10
New Zealand	17811	31629	36173	7*
South Africa	20633	39249	35252	7*
Chile	21225	24773	34618	7*
United States	1857	37246	34064	7*

Data Source: Trade Data Monitor and FAS New Delhi research.
*Rounded off

Import Barriers:

1. Non-tariff barriers continue to challenge apple exports to India.[2]These include the Food Safety and Standards Authority of India's requirement that imported apples must be accompanied by a certificate confirming the absence of genetically modified (GM) organisms and GM-origin. This requirement presents a challenge for exporters and impacts the U.S. apple trade, as well as trade from other origins, by adding compliance burdens and potentially limiting market access.[3] The United States has implemented a temporary solution through the Washington State Department of Agriculture (WSDA), which issues non-GMO and GM-free certificates exclusively to in-state stakeholders. Exporters outside of Washington State must obtain similar certification from their respective State Departments of Agriculture before shipping apples to India.[4]

2. Trade sources allege that Iranian apples are being imported into India under the guise of Afghanistan-origin to exploit the Afghanistan-India free trade agreement and avoid import duties.[5] Producer groups from Himachal Pradesh and Kashmir have repeatedly urged the Indian government to ban Iranian apples that are arriving under this relabeling practice.[6] In order to address this concern, the Indian Ministry of Commerce and Industry's Directorate General of Foreign Trade published Notification No. 5/2023 on May 8, 2023, amending the import policy

[2] See, GAIN-INDIA | IN2021-0042 | India – Requirement of a Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments – A Workaround Solution.
[3] See: GAIN- INDIA | IN2021-0042 | India - Requirement of a Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments - A Workaround Solution.
[4] See, GAIN-INDIA|IN2025-0003|India - Update of a Workaround Solution on Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments

[5] See: Tribune India, "Rathore seeks ban on Iranian apple import (November 12, 2024).
[6] Illegal Import of Iranian Apples through Afghanistan Causes Harm to Himachal Growers. See, Fresh Plaza and GAIN-INDIA | IN2013-2009 I 2013 Apple Product Brief.

for apples. The revised policy bans the import of apples with a cost, insurance, and freight (CIF) value less than or equal to Indian rupees (INR) 50 per kilogram (kg). Imports with a CIF value above INR 50 per kilogram are classified as "Free." Bhutan is exempted from these minimum import price conditions. This policy change represents a significant effort by the Indian government to address the under-invoicing of imported apples, particularly impacting shipments of lower value, unsorted (mixed) Iranian and Afghani apples.[7]

Exports: For MY 2025/2026, apple exports are anticipated to reach higher to 36 TMT on growing demand from neighboring markets. Post has revised its earlier estimates for MY 2024/2025 and MY 2023/2024 to 34,030 MT and 21,739 MT respectively, based on the latest trade data. Table 3 provides a detailed comparison of India's apple export trends over the past three marketing years.

Table 3. India: Apples, Fresh, Exports, MY 2022/23-2024/25 (MT)

Country	2022/23	2023/24	2024/25	Change %
World	52976	21739	34030	57
Bangladesh	30843	10940	21323	95
Nepal	21180	10137	11742	16
Bhutan	642	590	753	28
UAE	148	59	178	201

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

TRADE POLICY

India's apple imports (Harmonized Tariff Code – HS 0808.10) remain subject to a 50 percent basic customs duty, with no quantitative restrictions. Additionally, exporters must submit a phytosanitary certificate to Indian Customs, as required under the Indian government's Plant Quarantine Order, 2003 . This order outlines the conditions for importing planting seeds and agricultural products, including apples for consumption, into India.

Until September 2023, U.S.-origin apples faced a combined duty of 70 percent, which included a 20 percent retaliatory tariff. The removal of the retaliatory tariff has allowed the United States to re-establish a presence in the Indian market, though it has not yet regained its pre-tariff dominance.

PRICE

According to trade sources, the wholesale and retail prices for different varieties of apples, both domestic and imported from various origins for the month of September 2025 are as provided in Table 4.

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

Table 4: India, Apples, Fresh, Imports, Wholesale and Retail Prices, Sept. 2025					
Origin	**Varieties**	**Wholesale Price in INR per Box**	**Wholesale Price in USD per box**	**Retail Price in INR per kilogram**	**Retail Price in USD per kilogram**
USA (Washington state)	Red Delicious	4800 – 5200/20 kg	55-59/20 kg	350 – 400/kg	5
USA (Washington state)	Granny Smith	3700 – 3800/18 kg	42-43/18 kg	250 – 280/kg	3.5
USA (Washington state)	Cosmic Crisp	3300 – 3500/18 kg	38-40/18 kg	280 – 300/kg	3.5
New Zealand	Royal Gala	4200 – 4500/18 kg	48-51/18 kg	320 – 350/kg	4
New Zealand	Queen	4700 – 4800/18 kg	53-55/18 kg	350 – 400/kg	5
New Zealand	Granny Smith	3100 – 3200/18 kg	35-36/18 kg	300 – 350/kg	4
Italy	Granny Smith	1600 – 1700/9 kg	18-19/9 kg	300 – 320/kg	3.5
France	Granny Smith	3100 – 3200/18 kg	35-36/18 kg	300 – 320/kg	3.5
South Africa	Gala	2400 – 2600/18 kg	27-30/18 kg	250 – 280/kg	3.5
China	Fuji	3800 – 4000/20 kg	43-45/20 kg	320 – 350/kg	4
Indian	Red Delicious	2800 – 3000/27 kg	32-34/27 kg	200 – 220/kg	2.5
Indian	Granny	1200 – 1300/14 kg	13-15/14 kg	150 – 180/kg	2
Indian	Gala	1200 – 1300/10 kg	13-15/10 kg	220 – 240/kg	3
Indian	Golden	800 – 900/10 kg	9-10/10 kg	130 – 150/kg	2

Note: Exchange rate: One U.S. Dollar = 88 Indian rupees (as of September 29, 2025) Source: Trade Sources and FAS New Delhi research

COMMODITIES

PEARS, FRESH

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

Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	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 TREES)	300	300	300	300	0	300
Total Trees (1000 TREES)	12300	12300	12300	12300	0	12300
Commercial Production (MT)	312500	312500	313000	313000	0	314000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	312500	312500	313000	313000	0	314000
Imports (MT)	30000	29460	35000	31140	0	36000
Total Supply (MT)	342500	341960	348000	344140	0	350000
Domestic Consumption (MT)	342300	341753	347800	343880	0	349725
Exports (MT)	200	207	200	260	0	275
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	342500	341960	348000	344140	0	350000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data Source: FAS New Delhi historical data series; forecast for 2025/2026, estimates for 2024/2025, and 2023/2024

PRODUCTION

For MY 2025/26, India's pear production is expected to marginally increase to 314 thousand metric tons (TMT) from MY 2024/25. Field sources report that acreage remains unchanged, however, pear production remains constrained by weather challenges, limited post-harvest infrastructure, and cultivation difficulties. Transporting pears to organized markets poses significant logistical challenges due to the fruit's perishability and India's fragmented cold chain infrastructure. Industry sources suggest that meaningful improvements in pear quality are unlikely unless India invests in developing a fully integrated cold chain system.

India's Pear Production Cycle and Growing Areas: Pear production in India is cyclical, with yields fluctuating by up to 20 percent depending on climatic conditions during blossom and harvest. The timing of production is influenced by the variety and tree size, which vary by altitude and region. Pear trees typically bear fruit from late summer to early winter, spanning July to early October, though the exact timing depends on the variety and prevailing weather conditions.

Pears are primarily cultivated in the states of Jammu and Kashmir, Punjab, Uttar Pradesh, Uttarakhand, and Himachal Pradesh. Commonly grown varieties include Williams/Bartlett, Anjou, Pathamakh, Comice, China Pear, and Kashmir Nakh. Due to limited domestic production, India relies on imports to meet the growing consumer demand, ensuring year-round availability of fresh pears in the market.

India's Pear Cultivation Shortcomings: Domestic pear production faces challenges from fruit cracking, a physiological disorder that significantly impacts yield, quality, and marketability. Cracked fruits are highly susceptible to fungal and bacterial infections, further reducing their value. Factors contributing to fruit cracking include inadequate irrigation, environmental stress, excessive sun exposure, and even the color of packaging materials. Improved orchard management practices, such as consistent irrigation, protective shading, and optimized packaging, can help mitigate this issue and enhance production outcomes.

CONSUMPTION

For MY 2025/26, Post estimates pear consumption to rise marginally to 350 TMT, driven by growing demand from the urban middle class and the availability of new imported varieties that offer unique tastes beyond the reach of domestic supplies. The consumption estimates for MY 2024/25 and MY 2023/24 are revised downwards to 343 TMT and 341 TMT, respectively, due to lower-than-expected imports. Despite these adjustments, India's imported pear market shows strong growth potential in the near term, supported by steadily increasing consumer demand.

Consumer Preferences: Pears in India are primarily consumed fresh, with minimal processing accounting for only about 2 percent of domestic production. The absence of a fully integrated cold chain infrastructure and limited pear processing capabilities restricts market penetration. Indian pears generally do not compete with imports, as the domestic harvest season concludes before imported varieties arrive in November and are sold through late March. Among imported pears, the Green Bartlett variety from the United States is particularly popular due to its similarity to domestic pears. U.S. pears face competition from South African varieties such as Packham and Forelle, as well as Chilean Packham pears, which are also favored in the Indian market.

TRADE

Imports: For MY 2025/26, India's pear imports are expected to rise by 3 percent to 36 thousand metric tons (TMT), driven by steadily increasing consumer demand. South Africa continues to dominate India's pear import market, accounting for 75 percent of fresh pear imports, owing to its consistent quality, reliable fruit availability, and resilience to India's price inflation (see Table 6). Import estimates for MY 2024/25 and MY 2023/24 have been revised to 311 MT and 294 MT, respectively, based on the latest trade data.

Since the Indian government banned Chinese pear imports in May 2017, South Africa has emerged as India's leading international supplier. In August 2022, the Indian government approved in-transit cold treatment procedures for South African pears, significantly reducing delivery times and ensuring fresher produce for the Indian market.

Table 6. India: Pears, Fresh, Imports, MY 2022/2023-2024/2025 (MT)

Country	2022/23	2023/24	2024/25	Market Share (%)
World	28,279	27,976	29,456	--
South Africa	25,017	25,606	22,138	75
United Arab Emirates	466	370	913	3
Chile	661	1,339	787	3
Argentina	830	403	202	<1
United States	544	88	178	<1

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

Exports: For MY 2025/26, Post forecasts pear exports at 275 metric tons (MT), limited to neighboring countries. Export estimates for MY 2024/25 and MY 2023/24 have been revised to 260 MT and 207

MT, respectively, based on the latest trade data. In MY 2024/25, the majority of exports were directed to neighboring Bhutan (241 MT), with smaller quantities sent to Nepal and the Maldives.

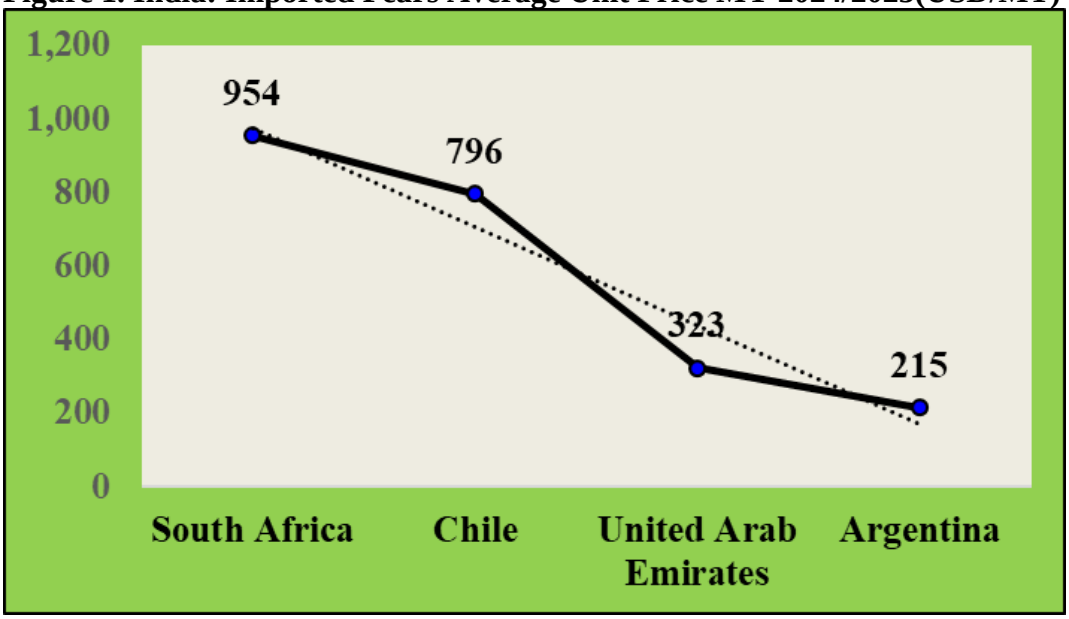
TRADE POLICY

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 2024/2025, the average price for imported fresh pears varied significantly by source. South African pears commanded the highest average price at $954 per MT, reflecting their superior quality and consistent availability. Imports from Chile were priced at $796/MT, while re-exported pears from the United Arab Emirates averaged $323/MT. Pears from Argentina were the least expensive, with an average price of $215/MT (see Figure 1).

Figure 1. India: Imported Pears Average Unit Price MY 2024/2025(USD/MT)



Source: Trade Data Monitor

COMMODITIES

GRAPES, TABLE, FRESH

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

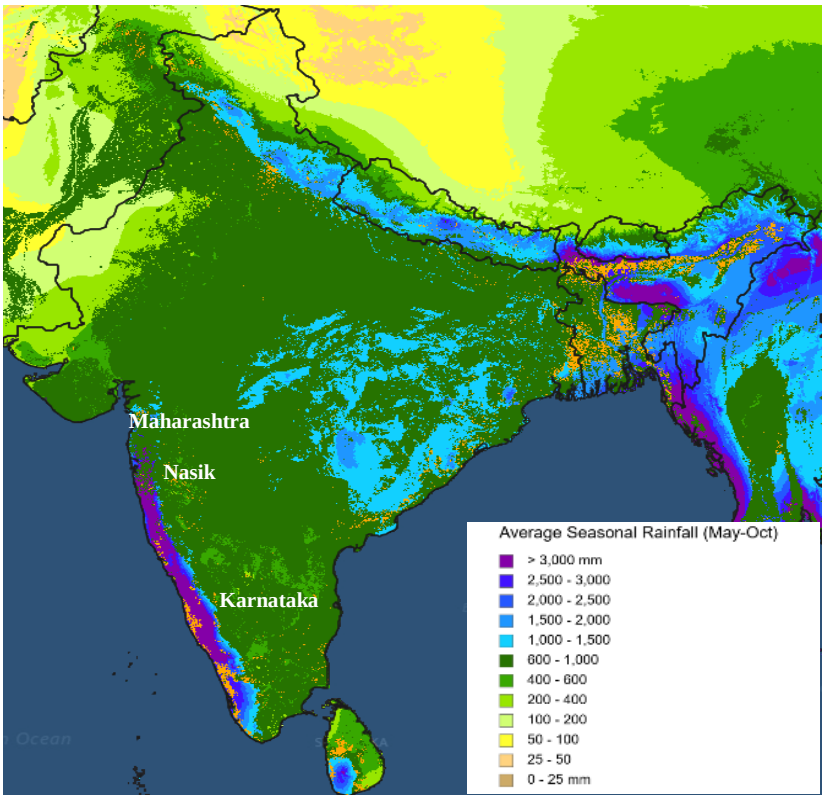
Grapes, Fresh Table	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jun 2023		Jun 2024		Jun 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	142000	142000	142000	142000	0	145000
Area Harvested (HA)	141500	141500	142000	142000	0	142500
Commercial Production (MT)	2950000	2950000	3068000	3068000	0	3150000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	2950000	2950000	3068000	3068000	0	3150000
Imports (MT)	18500	18490	20000	24800	0	26000
Total Supply (MT)	2968500	2968490	3088000	3092800	0	3176000
Fresh Dom. Consumption (MT)	2325800	2324860	2413000	2467950	0	2480000
Exports (MT)	312700	313630	335000	282850	0	350000
Withdrawal From Market (MT)	330000	330000	340000	342000	0	340000
Total Distribution (MT)	2968500	2968490	3088000	3092800	0	3176000
(HA), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data Source: FAS New Delhi historical data series; forecast for 2025/2026, estimates for 2024/2025, and 2023/2024.

PRODUCTION

India’s fresh table grape production for MY 2025/26 is forecast higher at 3.15 MMT, a three percent increase over MY 2024/25 on reported higher planting. Field sources report that untimely rain during May to October (See Figure 2) this year may affect the blossoming and fruiting.

Figure 2: India: Average Seasonal Rainfall in Grape Growing Areas (May-October 2025)

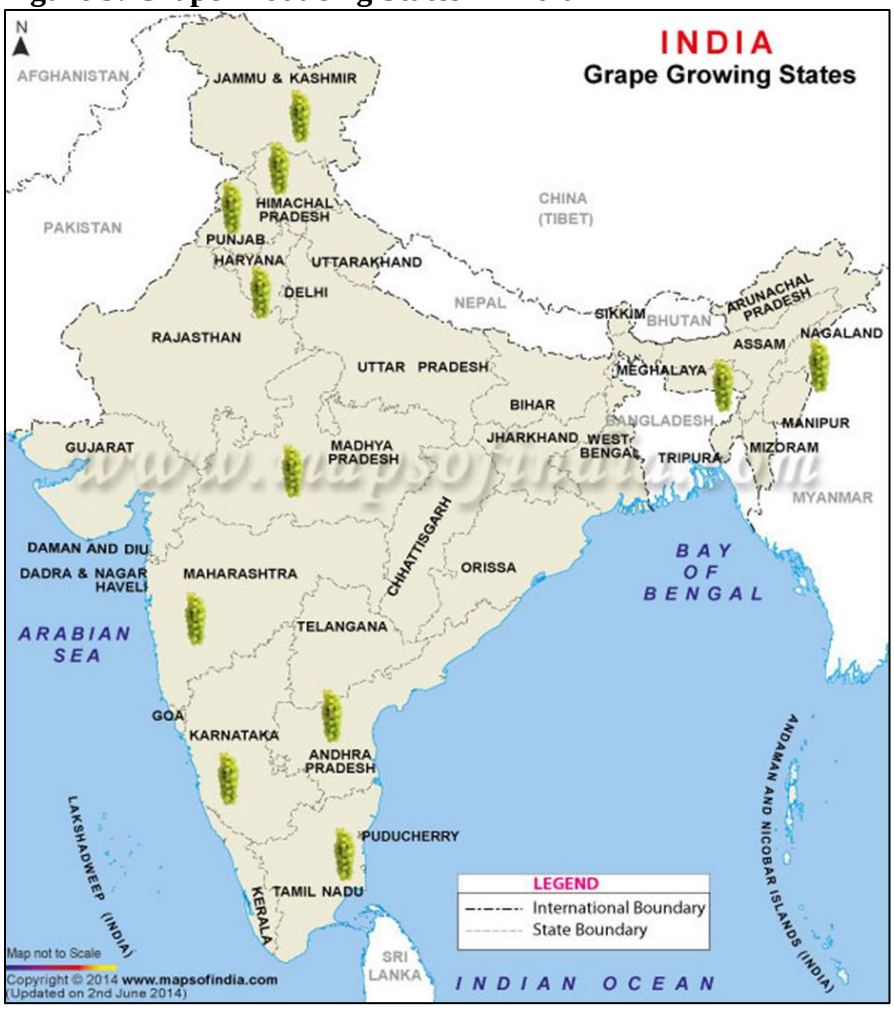


Source: Global Agricultural & Disaster Assessment System (GADAS)

India’s Grapes Production Country: Maharashtra, referred to as the “Grape Capital of India,” is the country’s leading grape-producing state, contributing 70 percent of total domestic production. Over 20 grape varieties are cultivated in India, with 12 grown commercially. Other grape-producing states

include Karnataka, Tamil Nadu, Andhra Pradesh, Telangana, Punjab, Haryana, Himachal Pradesh, Nagaland, Mizoram, and Madhya Pradesh (see Figure 3).
Thompson Seedless (Sultana) is the dominant grape varietal, accounting for 55 percent of the total cultivated area. Other notable varieties include purple seeded types such as Bangalore Blue, Isabella, Gulabi Syn, and Muscat Hamburg; white seeded varieties like Anab-e-Shahi and Dilkhush; black seedless varieties such as Sharad and Beauty; white seedless varieties including Thompson, Pusa, Perlette, Tas-A-Ganesh, Sonaka, and Manik Chaman; and red seedless varieties like Flame. Each of these varietal groups account for approximately 15 percent of cultivated area. Sultana and Sonaka are widely used for raisin production.

Figure 3: Grape Producing States in India



Source: Maps of India and FAS India research

While 78 percent of the production is used as fresh grapes, 17 percent is dried for raisin production. Increasingly, Indian grape producers are shifting toward raisin production due to its potential for higher and more stable profits, particularly during periods of declining fresh grape prices and reduced yields. This trend is further supported by growing demand for raisins in both domestic and export markets. The raisin industry is concentrated in Maharashtra's Sangli, Solapur, and Nasik districts, where lower-quality, thin-skinned grapes are primarily used for production.

Only two percent of grape production is allocated to winemaking, with the remainder used for juice production. However, regions like Nashik in Maharashtra are emerging as key hubs for wine production, fostering a growing domestic wine culture and attracting both local and international players. Although still a niche market compared to global counterparts, India's wine industry is expanding rapidly. Market research report project India's wine market to reach USD 892 million by 2033, growing at a compound annual growth rate (CAGR) of 16.3 percent between 2025 and 2033.[8] Rising disposable incomes, evolving lifestyles, and increasing demand from urban millennials are key drivers of growth in India's wine market. Additionally, the rapid expansion of e-commerce is fueling this growth by providing consumers with the convenience of online shopping, particularly appealing to younger, tech-savvy demographics. However, the industry faces significant challenges due to India's complex regulatory environment. Varying laws and regulations governing the sale and distribution of alcohol across different states create barriers for producers and distributors, complicating market expansion and operations.

Government-Assisted Initiative: The National Cooperative Exports Limited (NCEL), established and registered in 2023, is a government-backed initiative aimed at empowering farmers and cooperatives in India. NCEL provides critical support services to enable farmers, including grape growers and cooperative federations, to directly access global markets. By facilitating international trade, NCEL helps farmers secure higher prices for their products, particularly during periods of surplus production in domestic markets. This initiative strengthens the agricultural export framework and enhances the economic resilience of India's farming communities.[9]

Consumption

Post estimates table grape consumption for MY 2025/26 to rise by three percent to 2.49 MMT on forecast of higher supplies this year (production and imports). MY 2024/25 and MY 2023/24 consumption estimates have been revised to adjust to the latest trade estimates.

TRADE

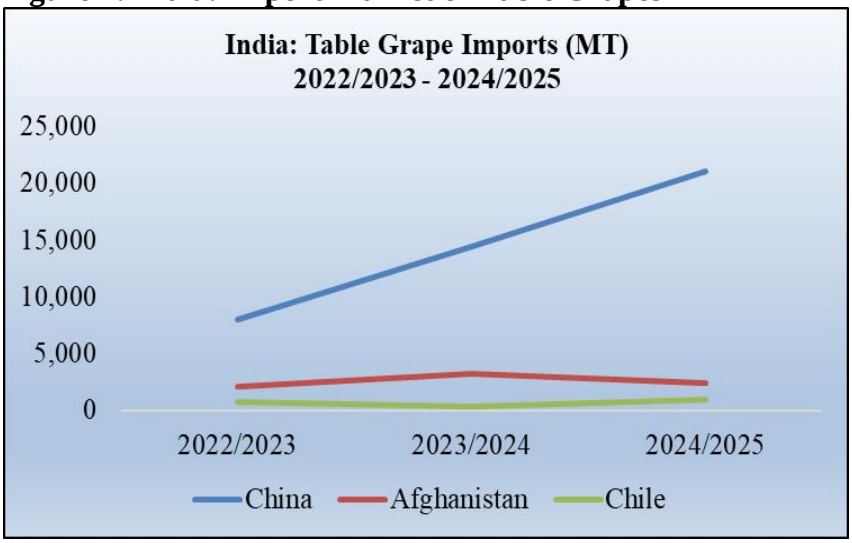
Imports: Post forecasts India's grape imports for MY 2025/26 to increase to 26,000 metric tons (MT), on expectations of continued strong domestic demand. Import estimates for MY 2024/25 and MY 2023/24 have been revised to 24,800 MT and 18,490 MT, respectively, based on the latest trade data. By volume, China remains India's dominant supplier, accounting for 85 percent of imports, followed by Afghanistan at 10 percent and Chile at 4 percent (see Table 8 and Figure 4).

[8] See, IMARC , "India Wine Market Size, Share, Trends and Forecast by Product Type, Color, Distribution Channel and Region, 2025-2033."
[9] https://ncel.coop/what-we-do/

India is also a significant importer and exporter in the raisin market. In MY 2024/25, while 29,974 MT of raisins were imported (HS Code 080620), primarily from Afghanistan, 39,862 MT were simultaneously exported.

Table 8. India: Table Grape Imports, MY 2021/22-2023/24 (MT)				
Country	**2022/2023**	**2023/2024**	**2024/2025**	**Market Share**
World	12,156	18,490	24,800	
China	8,036	14,469	21,080	85
Afghanistan	2,087	3,188	2,384	10
Chile	741	315	991	4
Egypt	508	202	114	<1

Figure 4: India: Import Market of Table Grapes

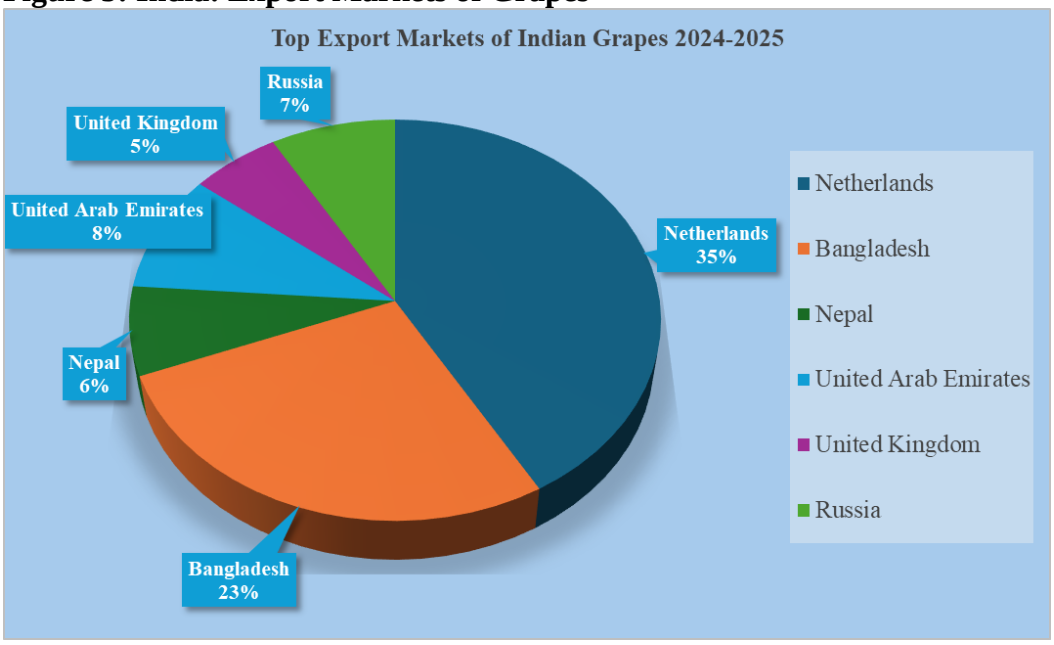


Data Source: Trade Data Monitor

Exports: India is one of the leading global exporters of fresh table grapes, with exports forecast to rise by four percent in MY 2025/26, reaching 350 TMT due to higher domestic supplies. However, adverse weather at the time of harvest and consequent quality loss may affect the export prospects.

India exported 283 TMT and 314 TMT of table grapes in MY 2024/25 and MY 2023/24, respectively (see Table 9 and Figure 5). By volume, approximately 35 percent of grape exports were shipped to the Netherlands, while 20 percent went to neighboring Bangladesh.

Figure 5: India: Export Markets of Grapes



Grape cultivation is a high-profit venture for growers, but it presents significant challenges. These include the prevalence of crop diseases, the need for sustainable use of crop protection products, food safety concerns related to chemical residues, and the stringent quality standards demanded by international retail chains. Despite these obstacles, Agricultural and Processed Food Products Export Development Authority (APEDA)-certified facilities have been instrumental in ensuring export-quality compliance. These facilities help growers meet global standards, enhancing India's reputation in international markets and supporting the continued growth of grape exports.

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

Country	2022/2023	2023/2024	2024/2025
World	2,82,785	313,630	282,853
Netherlands	78,769	109,743	99,537
Bangladesh	70,673	72,986	55,696
Russia	13,564	22,547	23,515
United Arab Emirates	19,663	26,036	23,236
Nepal	25,449	20,337	19,125

United Kingdom	14,920	15,632	17,657

Data Source: Trade Data Monitor

TRADE POLICY

India imposes no quantitative restrictions on fresh grape imports (HS Code 0806.10). However, these imports are subject to a 30 percent basic customs duty. Importers must present a phytosanitary certificate to Indian Customs during clearance procedures. Additionally, the Indian government's Plant Quarantine Order, 2003 governs the import of planting seeds and agricultural products, including fresh grapes for consumption, ensuring compliance with safety and quality standards.

PRICES

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

AVERAGE IMPORT PRICES OF TABLE GRAPES (USD/METRIC TONS) * MARKETING YEAR (MY) 2023-24 AND 2024-25			
COUNTRY	2023-2024	2024-2025	CHANGE (%)
World	1,236	1,143	7.5
United States	2,473	4,810	94.5
Australia	2,141	2,412	13
Afghanistan	1,150	1,178	2.43
China	1,218	1,115	-8.4
Chile	2,178	1,369	-37

*Cost, Insurance and Freight (CIF) prices

Source: Trade Data Monitor

Attachments:

No Attachments