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Prepared By: Radha Mani, Agricultural Specialist

Approved By: Karen Richards

Report Highlights:

India's fresh fruit market continues to expand, driven by a young population, rising incomes, and growing health awareness. Apples, pears, and grapes lead consumer demand. In the apple market, domestic production supplies seasonal volume at affordable prices, while imports fill off-season gaps and meet demand for premium, consistent quality. Imports have turned pears from a limited seasonal product into a year-round category by timing shipments to the gap between domestic harvests. India remains a major table grape exporter. Over the next decade, modernization, climate resilience, and new varieties should drive growth in the sector, although unseasonal weather swings and export challenges weighed on performance in marketing year 2025/26.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

COMMODITIES

APPLES, FRESH

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

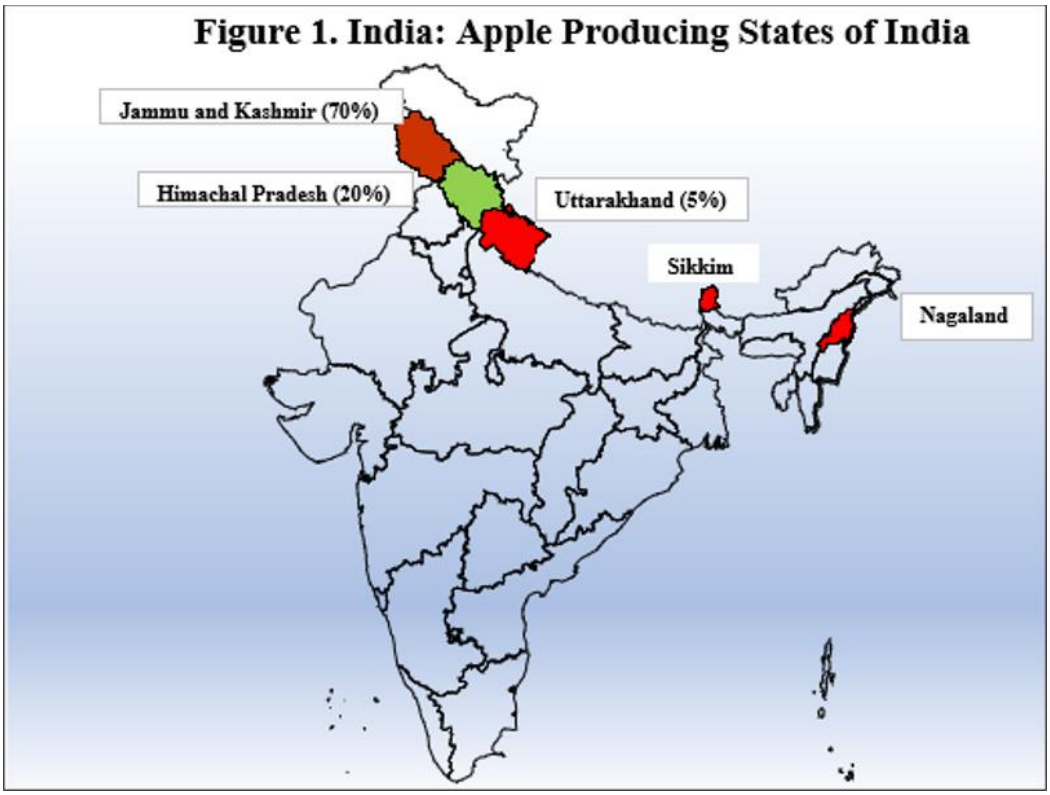
Apples, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	326000	326000	326000	326000	0	326100
Area Harvested (HA)	278000	278000	278000	278000	0	278000
Bearing Trees (1000 TREES)	80000	80000	80000	79900	0	79950
Non-Bearing Trees (1000 TREES)	11550	11550	11550	11550	0	11490
Total Trees (1000 TREES)	91550	91550	91550	91450	0	91440
Commercial Production (MT)	2550000	2550000	2605000	2505000	0	2590000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	2550000	2550000	2605000	2505000	0	2590000
Imports (MT)	510900	510930	575000	428750	0	511000
Total Supply (MT)	3060900	3060930	3180000	2933750	0	3101000
Domestic Consumption (MT)	2880900	2880930	2993500	2768120	0	2912000
Exports (MT)	34000	34000	40000	35630	0	42000
Withdrawal From Market (MT)	146000	146000	146500	130000	0	147000
Total Distribution (MT)	3060900	3060930	3180000	2933750	0	3101000
(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

FAS New Delhi forecasts apple production for marketing year (MY) July–June 2026/27 at 2.59 million metric tons (MMT), up three percent from the previous year estimate. The MY 2025/26 production estimate is revised lower by four percent, to 2.50 MMT as the erratic weather dropped yields sharply in Himachal Pradesh, which is the second-largest apple-producing state. Unseasonal spring rains and a delayed winter snowfall hurt the fruit set, and monsoon damage followed during the harvest season. In contrast, trade sources report that weather conditions in Jammu and Kashmir, the leading apple-producing region, were more favorable in MY 2025/26 than MY 2024/25 from flowering through harvest, supporting a larger, higher-quality crop.

Apple Growing Regions: The union territory of Jammu and Kashmir, in the far north, is the country's dominant apple producer. It accounts for approximately 70 percent of domestic production. Himachal Pradesh, to its southeast, accounts for nearly 20 percent. Orchards in these regions grow mainly Red Delicious, Golden Delicious, Ambri, McIntosh, Granny Smith, and Rich-a-Red varieties. Uttarakhand contributes roughly 2.5–6 percent of production, while Sikkim and Nagaland produce only small amounts (Figure 1).



Source: FAS New Delhi

Apple Production Constraints:

Indian apple growers face serious challenges because the harvest season overlaps with the monsoon. They also face unstable markets, weak infrastructure, rising input costs, competition from imports, and logistical failures. Most apple-producing regions lie in remote, mountainous areas, which limits small-scale growers' access to markets. Apples spoil quickly, so poor roads, weak transportation networks, and limited cold storage often lead to post-harvest losses.

Limits of Government Intervention: Agriculture 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. For example, switching orchards to high-density planting takes heavy upfront capital. Small-scale growers own most orchard land, and they struggle to afford this change without substantial direct financial help. In contrast, some private players have established independent warehouses and pricing schemes, leveraging modern infrastructure such as cold storage facilities. These companies bypass the traditional wholesale markets (Mandis) and their chain of commission agents, offering better prices for premium apples. However, their stringent

[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.

grading systems—based on factors like size and color—result in very high prices for top-quality produce, while apples with minor blemishes sell for far less.

CONSUMPTION

The apple consumption forecast for MY 2026/2027 is 2.91 MMT, up by five percent from the revised MY 2025/2026 estimate. Several factors such as rising disposable incomes, stronger demand for high-quality apples and a wider range of varieties (including imports), and greater health awareness drive the MY 2026/2027 growth forecast. Growing demand for processed apple products, such as juices, jams, sauces, and dried fruit, also supports consumption growth. The MY 2025/2026 consumption estimate is revised lower to 2.76 MMT due to lower-than-expected imports.

Fresh and Processed Consumption: 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 fastest-growing value-added products include ready-to-drink juices and beverages, health and wellness products, dehydrated snacks, jams, sauces, and purees.

E-commerce platforms and organized retail have made it easier for consumers to buy fresh apples, including premium imported varieties. Domestic production often falls short of demand, and imports fill the gap. Imported apples sell at higher prices because they last longer and have consistent quality. However, keeping quality high across the value chain remains hard, particularly in smaller cities. Refrigerated storage is limited, costs are high, and customers are spread out, which makes distribution complex.

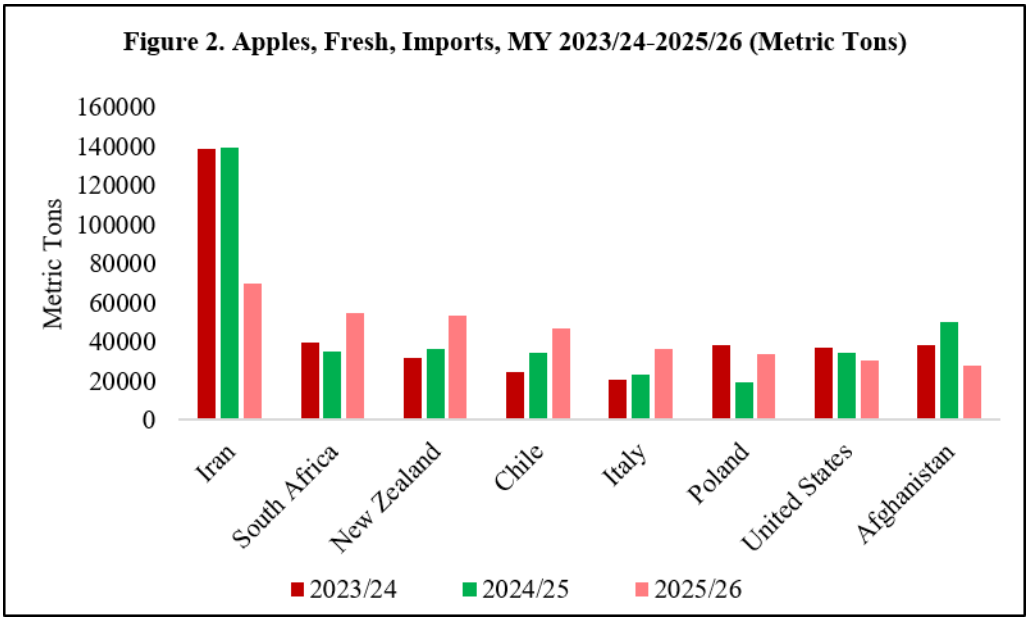
TRADE

Imports: The forecast for MY 2026/27 imports is at 511 thousand metric tons (TMT), up by 19 percent from the MY 2025/26 estimate, assuming market conditions move back toward historical patterns. Apple imports are lower at 428,750 metric tons (MT) in MY 2025/26 as it was under pressure from seasonal patterns, exchange rate swings, high freight costs, and India's new trade agreements. The importers are carefully planning their inventory and have slowed purchases, at least until domestic supplies decline.

The MY 2025/2026 and MY 2024/2025 estimates are revised to 428,750 MT and 510,930 MT respectively, based on the latest trade data. Table 2 provides a comparative overview of India's fresh apple imports from global markets with their market share over the past three years (2024–2026). The graphical presentation of the same is shown in Figure 2.

Table 2. India: Apples, Fresh, Imports, MY 2023/2024-2025/2026(MT)				
Country	**2023/24**	**2024/25**	**2025/26**	**Market Share (%)**
World	544024	510930*	428750*	--
South Africa	39249	35252	54319	13
New Zealand	31629	36173	53622	13
Chile	24773	34618	46991	11
United States	37246	34064	30142	7
Afghanistan	37937	49886	28013	7
Iran	138774	138994	69988	16
Turkey	123213	94956	14370	3

*rounded of
Data Source: Trade Data Monitor



Source: Trade Data Monitor and FAS New Delhi

Iran and Turkey lead the value segment, supplying large volumes at competitive prices. The United States and New Zealand lead the premium segment, where landed costs are higher and consumers expect consistency, safety, and variety. Imports of New Zealand apples rose almost 70 percent, from 31,629 MT in MY 2023/24 to 53,622 MT in MY 2025/26. Trade sources expect the India–New Zealand FTA to continue to drive growth.

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)

[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.

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 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 Ministry of Commerce and Industry's Directorate General of Foreign Trade published Notification No. 5/2023 on May 8, 2023, amending the import policy 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 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]

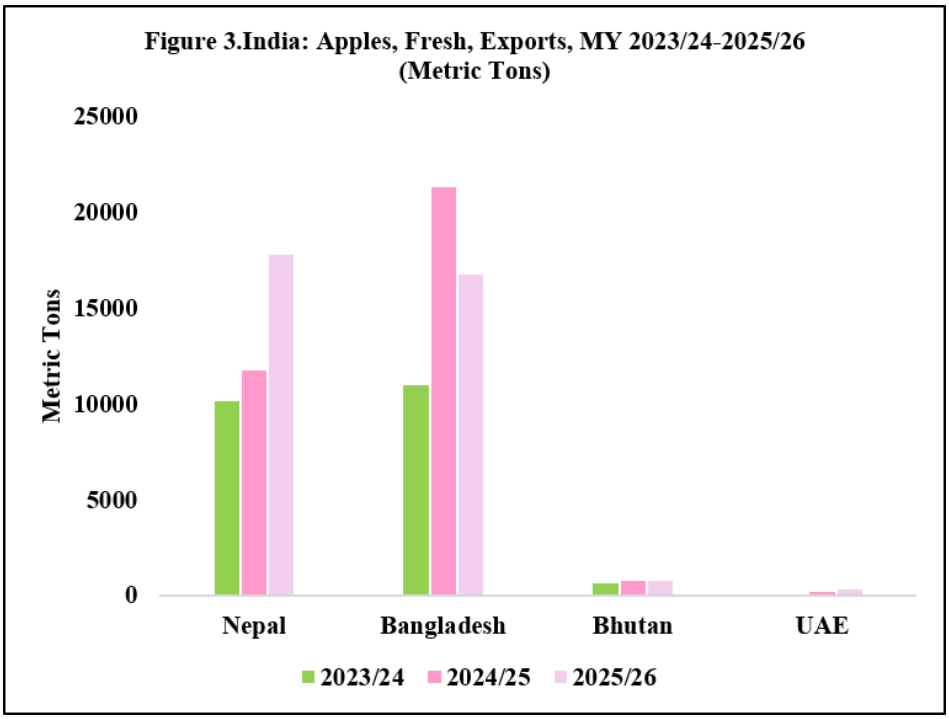
Exports: The MY 2026/27 forecast for apple exports is at 42 TMT, up by 18 percent on expectations of higher supplies and demand from core neighboring export markets. Table 3 and Figure 3 provides comparison of India's apple exports over the past three marketing years.

Table 3. India: Apples, Fresh, Exports, MY 2023/24-2025/26 (MT)

Country	2023/24	2024/25	2025/26	Change %
World	21739	34029	35633	--
Nepal	10137	11742	17802	52
Bangladesh	10940	21323	16751	-21
Bhutan	590	753	751	<1
UAE	59	178	298	67

Data Source: Trade Data Monitor

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



Source: Trade Data Monitor and FAS New Delhi

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, except under the India-New Zealand FTA. 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, including a 20 percent retaliatory tariff. Since India removed the retaliatory tariff, U.S. apple exports have rebounded significantly, though U.S. exporters face stiff competition and shifting trade dynamics as they work to regain their historical market share.

PRICE

The wholesale and retail prices for different varieties of imported apples from various origins for the month of September 2026 are provided in Table 4.

Table 4: India, Apples, Fresh, Imports, Wholesale and Retail Prices, Sept. 2026					
Origin	**Varieties**	**Wholesale Price in INR per Box**	**Wholesale Price in USD per box**	**Retail Price in INR per kilogram (kg)**	**Retail Price in USD per kilogram**
USA (Washington state)	Red Delicious	5500-5700/20 kg	57-59/20 kg	350 – 380	4
USA (Washington state)	Granny Smith	4400 – 4500/18 kg	46-47/18 kg	300 – 320	3
New Zealand	Royal Gala	4600 – 4800/18 kg	48-50/18 kg	320 – 350	4
New Zealand	Queen	4900 – 5000/18 kg	51-52/18 kg	340 – 360	4
New Zealand	Fuji	4500– 4700/18 kg	47-49/18 kg	320 – 350	4
New Zealand	Pink Lady	4300- 4400/18 kg	45-46/18 kg	300 – 320	3
New Zealand	Red Delicious	4500 – 4700/18 kg	47-49/18 kg	300 – 320	3
Turkey	Red Delicious	4200 – 4300/18 kg	44-45/18 kg	280 – 300	3
Chile	Royal Gala	3800 – 3900/19 kg	40-41/19 kg	320 – 380	4
Chile	Granny	4400 – 4500/18 kg	46-47/18 kg	300 – 330	3
Chile	Royal Chief	4300 – 4400/20 kg	45-46/20 kg	300 – 320	3
South Africa	Royal Beauty	4200 – 4300/18 kg	44-45/18 kg	280 – 300	3
South Africa	Granny	4400-- 4500/18 kg	46-47/18 kg	300 - 320	3
South Africa	Gala	4100 – 4200/18 kg	43-44/18 kg	300 – 350	4
Italy	Granny Smith	4200 – 4300/18 kg	44-45/18 kg	300 – 320	3
Italy	Gala	4100 – 4200/18 kg	43-44/18 kg	300 – 350	4
Italy	Red Delicious	3000 – 3200/14 kg	31-33/14 kg	280 – 300	3
China	Fuji	3000 – 3100/10 kg	31-32/10 kg	400 – 450	5

Note: Exchange rate: One U.S. Dollar = 96 Indian rupees (as of October 6, 2026)
Source: Trade Sources and FAS New Delhi research

COMMODITIES

PEARS, FRESH

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

Pears, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
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)	313000	313000	314000	314000	0	315500
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	313000	313000	314000	314000	0	315500
Imports (MT)	31100	31140	35000	33900	0	35000
Total Supply (MT)	344100	344140	349000	347900	0	350500
Domestic Consumption (MT)	343800	343930	348800	347640	0	350200
Exports (MT)	300	210	200	260	0	300
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	344100	344140	349000	347900	0	350500
(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

India's pear production for MY 2026/27 (July-June), is forecast to increase moderately to 316 thousand metric tons (TMT). Field sources report that acreage remains unchanged; the marginal increase in production reflects overall growth that remains highly constrained. Production is unable to surge and meet rising consumer demand due to infrastructural limits and pest and disease occurrences, which cause yields to vary significantly. Transporting pears to organized markets poses significant logistical challenges due to the fruit's perishability and fragmented cold chain infrastructure. India relies heavily on importing premium off-season varieties to bridge the gap between stagnant domestic supply and rapidly growing demand for the fruit.

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, the country relies on imports to meet the growing consumer demand, ensuring year-round availability of fresh pears in the market.

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

The MY 2026/27 pear consumption estimate is raised to 350 TMT. Consumer demand is increasing as an expanding urban middle class values pears for their high dietary fiber and weight management benefits. The year-round "Counter-Season" import loop makes pears a year-around staple not only in Tier-I but Tier-II and Tier-III cities. The consumption estimates for MY 2025/26 and MY 2024/25 are revised respectively to 347 TMT (lower-than-expected imports) and 343 TMT (higher-than-usual 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: Approximately 98 percent of pears are strictly consumed fresh as India lacks a robust industrial processing ecosystem for pear juices, purees, or canned products. Consumption is entirely reliant on immediate fresh fruit sales. 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: Pear imports for MY 2026/27 are forecast to rise by three percent to 35 thousand metric tons (TMT), driven by steadily increasing consumer demand. South Africa has emerged as the leading international supplier, accounting for 77 percent of fresh pear imports, owing to its consistent quality, reliable fruit availability, and resilience to India's price inflation (see Table 6). 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.

In MY 2024/25, pear imports were stronger, as South Africa redirected its surplus Controlled Atmosphere storage pears into India, pushing prices down. India had banned Chinese pear

imports in May 2017, as a result, China flooded other regional markets – including the Middle East and Russia – with highly competitive, lower-priced pears, absorbing surging regional demand and disrupting normal distribution flows. Global exporters, such as South Africa, redirected their surplus into India, causing a prolonged oversupply that crashed wholesale market prices in late 2025. This price drop discouraged importers from bringing in additional premium global shipments during MY 2025/26. The import estimate for MY 2025/26 is revised to 339 MT, based on the latest trade data.

Table 6. India: Pears, Fresh, Imports, MY 2023/2024-2025/26 (MT)				
Country	**2023/24**	**2024/25**	**2025/26**	**Market Share (%)**
World	29,456	31,141	33,903	--
South Africa	22,138	25,200	25,982	77
United Arab Emirates	5,209	1,714	2,874	8
Chile	1,413	3,512	3,915	12
United States	178	0	500	2
Argentina	202	504	432	1

Data Source: Trade Data Monitor

Exports: The MY 2026/27 forecast for pear exports is 300 metric tons (MT) and is limited to neighboring countries. Export estimates for MY 2025/26 and MY 2024/25 have been revised to 260 MT and 210 MT, respectively, based on the latest trade data. In MY 2025/26, the majority of exports were directed to neighboring Bhutan (241 MT), with smaller quantities to Nepal.

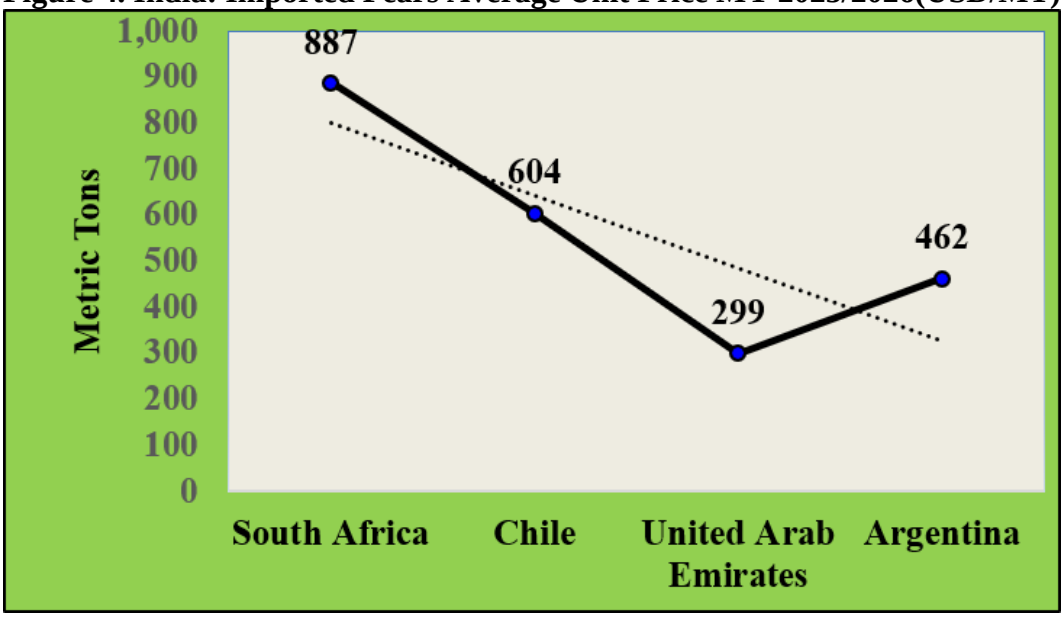
TRADE POLICY

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 2025/2026, the average price for imported fresh pears varied significantly by source. South African pears commanded the highest average price at $887 per MT, reflecting their superior quality and consistent availability. Imports from Chile were priced at $604/MT, while pears from Argentina averaged $462. Re-exported pears from the United Arab Emirates were the least expensive with an average price of $299/MT. (see Figure 4).

Figure 4. India: Imported Pears Average Unit Price MY 2025/2026(USD/MT)



Source: Trade Data Monitor & FAS New Delhi

COMMODITIES

GRAPES, TABLE, FRESH

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

Grapes, Fresh Table	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	142000	142000	145000	145000	0	148000
Area Harvested (HA)	142000	142000	142500	142500	0	143000
Commercial Production (MT)	3068000	3068000	3150000	3140000	0	3232000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	3068000	3068000	3150000	3140000	0	3232000
Imports (MT)	24800	24900	25000	33600	0	35000
Total Supply (MT)	3092800	3092900	3175000	3173600	0	3267000
Fresh Dom. Consumption (MT)	2467900	2468050	2535000	2618800	0	2697000
Exports (MT)	282900	282850	300000	204500	0	250000
Withdrawal From Market (MT)	342000	342000	340000	350300	0	320000
Total Distribution (MT)	3092800	3092900	3175000	3173600	0	3267000
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

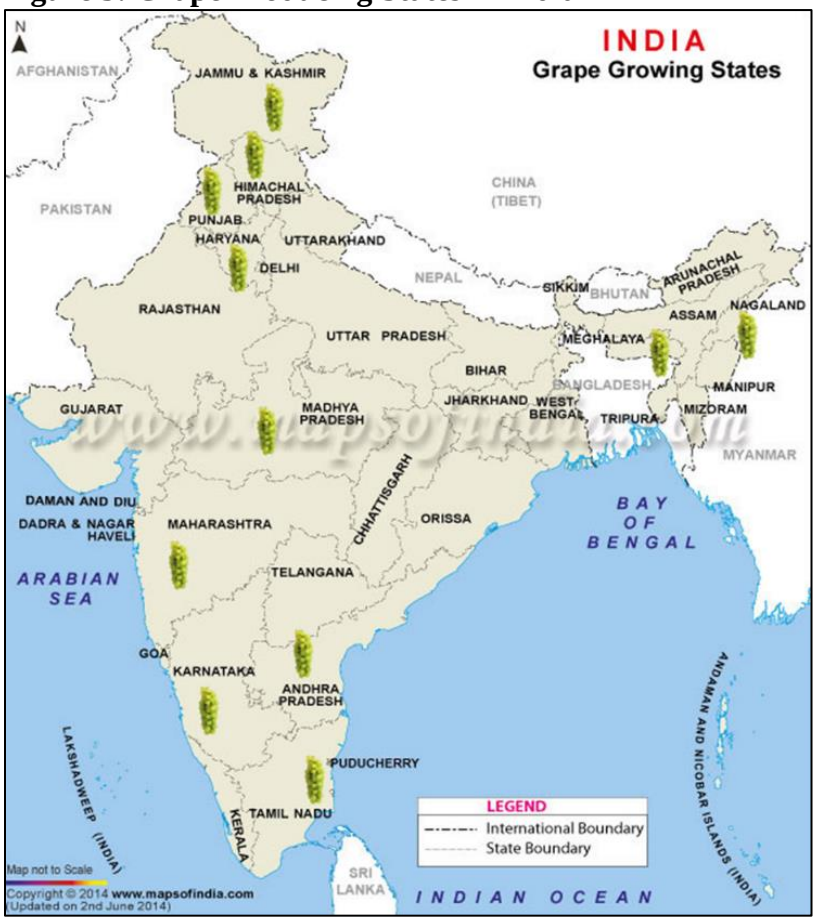
Data Source: FAS New Delhi historical data series; forecast for 2025/2026, estimates for 2024/2025, and 2023/2024.

PRODUCTION

India's fresh table grape production for MY 2026/27 (June-May) is forecast higher at 3.23 MMT, a three percent increase over revised MY 2025/26 estimate on reported higher planting and expanding acreage, driven by strong price realizations and a shift toward climate resilient, patented varieties such as Aara white, Crimson and Red Globe. The MY 2025/26 estimate is revised at 3.14 MMT. According to field sources, MY 2025/26 crop faced significant challenges and resulted in lower yields due to an unusually long monsoon and heavy unseasonal rainfall. Output in major areas dropped considerably, restricted harvest volumes, shortened the export windows, and resulted in higher prices. This prompted some growers to sell locally rather than to export channels. Key export hubs like Nashik saw a decline of almost 10 percent in total export shipments.

India's Grapes Production Country: Production is strongly concentrated in Maharashtra, particularly in the Nashik region, known as the "Wine Capital of India," and a key Indian grape production hub contributing 70 percent of total domestic production. Other producing states also stand out, including, Karnataka, Tamil Nadu, Andhra Pradesh, Telangana, Punjab, Haryana, Himachal Pradesh, Nagaland, Mizoram, and Madhya Pradesh (see Figure 5).

Figure 5: Grape Producing States in India



Source: Maps of India

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.

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. Some projections have India's wine market to reaching as high as $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 success 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.

Challenges Facing the Grape Sector:

Grape cultivation is a high-profit venture for growers, but it presents significant challenges. Water scarcity, weather variability, and disease pressure are among the main challenges facing the grape sector. Additionally, land ownership fragmentation is hindering the adoption of advanced technologies in production. Moving forward, key factors for both domestic and export markets depends on greater professionalization of producers, investment in infrastructure, strengthening of cold chain, development of new varieties, consistency in supply, and traceability.

Government-Assisted Initiative: The primary government-assisted initiatives available for grape farmers include vineyard infrastructure and cultivation subsidies; micro-irrigation and solar subsidies; post-harvest and cold chain infrastructure; export incentives and supply chain support; and risk management and credit support. Additionally, the National Cooperative

[8] See, IMARC , "India Wine Market Size, Share, Trends and Forecast by Product Type, Color, Distribution Channel and Region, 2025-2033."

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

The table grape consumption forecast for MY 2026/27 is raised by three percent to 2.69 MMT on the assumption of higher supplies this year (production and imports). MY 2025/26 and MY 2024/25 consumption estimates have been revised to adjust higher imports.

TRADE

Imports: India's grape imports for MY 2026/27 is forecast at 35,000 MT, on expectations of continued strong domestic demand. Import estimates for MY 2025/26 and MY 2024/25 have been revised to 33,600 MT and 24,900 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 6).

India is also a significant importer and exporter in the raisin market. In MY 2025/26, while 33,980 MT of raisins were imported (HS Code 080620), primarily from Afghanistan, 15,769 MT were exported due to lower yields.

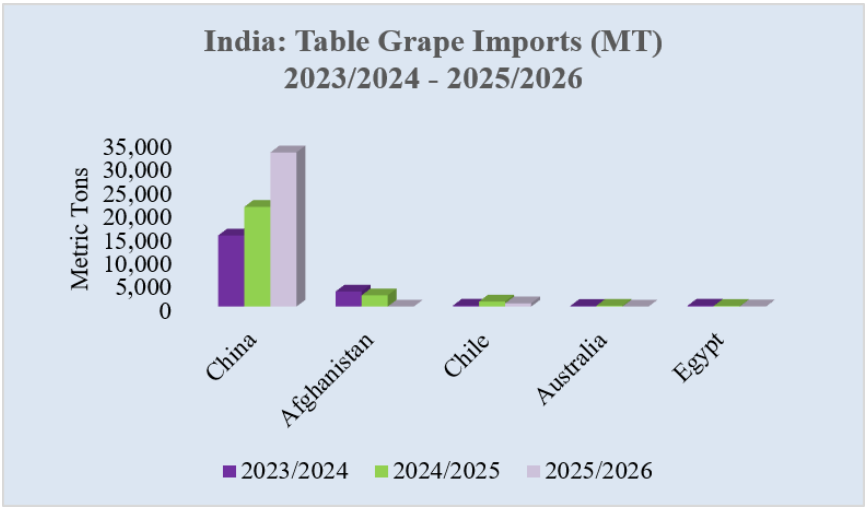
Table 8. India: Table Grape Imports, MY 2023/24-2025/26 (MT)

Country	2023/2024	2024/2025	2025/2026	Market Share
World	18,903	24,909	33,583	--
China	15,069	21,122	32,649	85
Afghanistan	3,188	2,384	2	10
Chile	204	1,065	683	4
Egypt	202	142	45	<1

Source: Trade Data Monitor

[9] https://ncel.coop/what-we-do/

Figure 6: 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 the export forecast to rise by 22 percent in MY 2026/27 reaching 250 TMT. This growth percentage assumes that the grape regions recover from the adverse weather and logistics. Indian growers are now rapidly transitioning from traditional varieties to premium grapes which offer significantly higher yields and are more resilient to unseasonal rains.

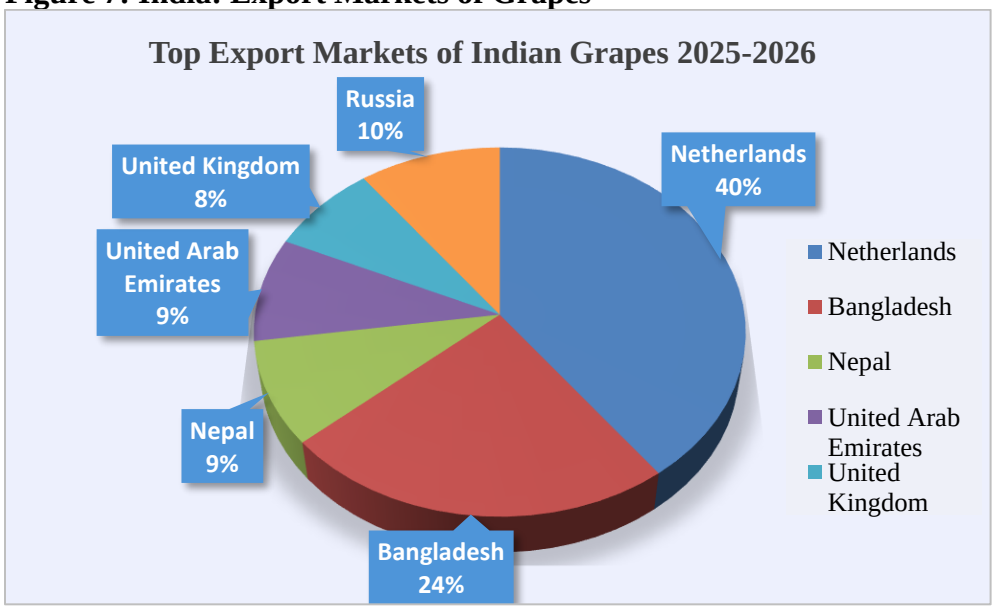
Table 9. India: Table Grape Exports, MY 2023/2024-2025/2026(MT)

Country	2023/2024	2024/2025	2025/2026
World	313,630	282,853	204,458
Netherlands	109,743	99,537	71,123
Bangladesh	72,986	55,696	43,785
Russia	22,547	23,515	17,771
United Arab Emirates	26,036	23,236	17,059
Nepal	20,337	19,125	15,396
United Kingdom	15,632	17,657	13,388

Data Source: Trade Data Monitor

India exported 204 TMT of table grapes in MY 2025/26 (see Table 9 and Figure 7). By volume, approximately 40 percent of grape exports were shipped to the Netherlands, while 24 percent went to neighboring Bangladesh.

Figure 7: India: Export Markets of Grapes



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) 2024-25 AND 2025-26			
COUNTRY	2024-2025	2025-2026	CHANGE (%)
World	1,143	964	16
United States	4,810	5,267	10
Australia	2,412	2,662	10
Afghanistan	1,178	2,395	103
China	1,115	941	16
Chile	1,369	1,518	11

*Cost, Insurance and Freight (CIF) prices
Source: Trade Data Monitor

Attachments:

No Attachments