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Report Highlights:

India's domestic apple and pear production in market year (MY) (July-June) 2022/23 are estimated at 2.35 million metric tons (MMT) and 311,000 metric tons (MT), respectively. Favorable rainfall in Kashmir and Himachal Pradesh has augmented yields and will lead to increased exports. Market year 2022/23 apple imports are estimated at 430,000 MT. India's domestic apple industry continues to compete against imported Turkish and Iranian apples (in addition to other sources) and is hindered by an insufficient cold chain network that contributes to reduced product quality and limited distribution beyond the northern India region. Domestic table grape production is forecast at 2.85 MMT, largely unchanged from the previous MY as excessive rains in Maharashtra have delayed pruning and reduced the harvest window. Consumer demand for domestic and imported apples, pears, and grapes is steadily growing.

COMMODITIES

APPLES, FRESH

Table 1. India: Commodity, Apples, Fresh, Production, Supply and Distribution (Area in Hectares, Quantity in Metric Tons, and Trees in Thousands)

Apples, Fresh	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
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)	75000	75000	80000	80000	0	80000
Non-Bearing Trees (1000 TREES)	18000	18000	13000	13000	0	12000
Total Trees (1000 TREES)	93000	93000	93000	93000	0	92000
Commercial Production (MT)	2300000	2300000	2300000	2300000	0	2350000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	2300000	2300000	2300000	2300000	0	2350000
Imports (MT)	376700	376700	430000	448000	0	430000
Total Supply (MT)	2676700	2676700	2730000	2748000	0	2780000
Domestic Consumption (MT)	2399900	2400000	2559500	2577400	0	2600000
Exports (MT)	30300	30300	32000	32100	0	45000
Withdrawal From Market (MT)	246500	246400	138500	138500	0	135000
Total Distribution (MT)	2676700	2676700	2730000	2748000	0	2780000

Data source: OAA New Delhi historical data series. Post forecast for 2022/23, estimates for 2021/22 and 2020/21.

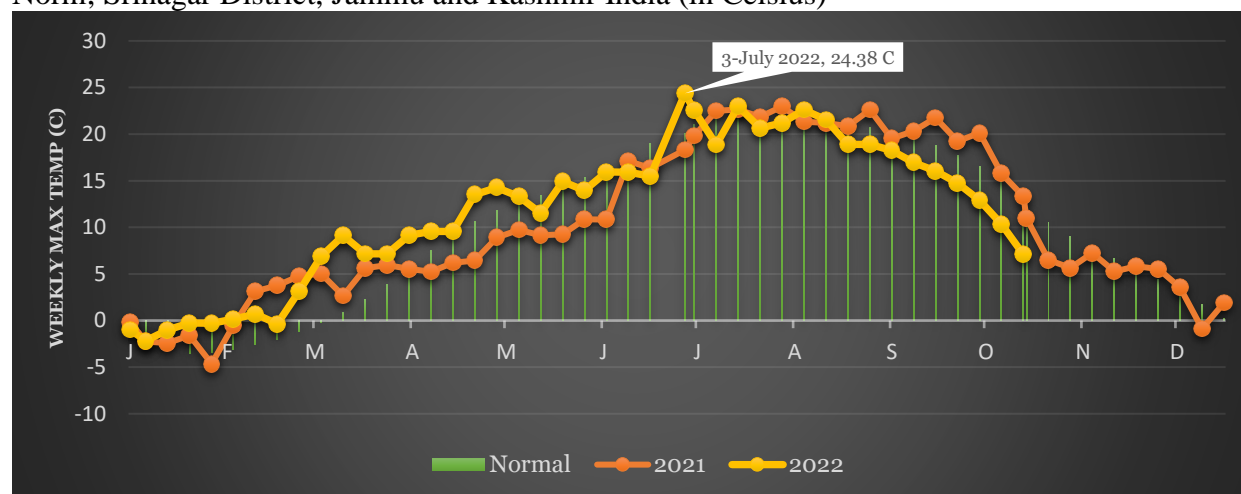
PRODUCTION

FAS New Delhi (Post) forecasts India's MY 2022/23 (July-June) apple production at 2.35 million metric tons (MMT), largely unchanged from MY 2021/22. The 2022 monsoon provided sufficient rainfall during the flowering and fruit setting period, resulting in a favorable harvest with strong market arrivals in the current marketing year. The Union Territory of Jammu and Kashmir continues to be the dominant producer, accounting for approximately 70 percent of domestic production, while the state of Himachal Pradesh accounts for close to 20 percent. Apple orchards in these states range largely consist of the *Red Delicious*, *Royal Delicious* and *Rich Red* varieties. Uttarakhand, Arunachal Pradesh, Nagaland, and Sikkim account for a combined ten percent of production.

Factors limiting value chain growth include insufficient cold chain infrastructure that results in internal distribution to mostly the northern India region, increased input costs, and aging trees. A sustained heatwave that ran from mid-March into June 2022 affected India's apple growing regions. To maintain quality, orchards typically require an established set of chilling hours and a

21-24 Celsius temperature during the active growth period. Higher than normal daily temperatures during the growing period (Figure 1) have had an impact on fruit quality. Given these trends, apple producers are gradually reportedly moving orchards to higher altitudes due to changing precipitation patterns and a warmer climate.¹

Figure 1. India: Calendar Year 2021-2022 Weekly Maximum Temperature Against Historical Norm; Srinagar District, Jammu and Kashmir India (in Celsius)



Notes: Srinagar is one the primary apple growing regions in Jammu and Kashmir. Maximum weekly air temperature is determined by selecting the highest one-hour air temperature within each 24-hour period. Maximum temperature data is provided as the average value found across a one-week period from daily maximum temperatures against historical averages. This satellite-derived weather data is from the U.S. Air Force (USAF) 557th Weather Wing. Source: USDA Global Agricultural and Disaster Assessment System ([GADAS](#)).

To address periods of high production and low prices, the Ministry of Agriculture and Farmers Welfare utilizes the Market Intervention Scheme (MIS), a program where both the state and the federal governments jointly support marketing agencies to procure perishable commodities at a pre-determined quantity and price.² For the current MY, Himachal Pradesh allocated 145,000 metric tons (MT) of apples be procured by the state marketing agencies for USD \$0.13 per kilogram (kg) (Indian rupee [INR] 10.50/kg),³ with a \$0.03/kg (INR 2.75/kg) handling charge. As of October 21, 2022, these state agencies⁴ have procured over 80,000 MT of apples, the highest procurement rate since 2010.⁵ Much of the apple production procured through the MIS are typically processed for juices and other products due to low quality.

¹ Source: “Climate Change Is Pushing Himachal Pradesh’s Apples to Higher Altitudes.” [Outlook](#); published on July 12, 2022.

² The Market Intervention Price (MIP) subsidy is similar to the Minimum Support Price mechanism and is approved if the state/Union territory accepts at least 50 percent of the loss (25 percent for Northeastern States) on its implementation. The MIP is given when there is a ten percent increase in production or ten percent decrease in price over the previous “normal year.”

³ For purposes of this report, USD \$1 = 82.70 Indian rupees

⁴ Includes the Himachal Pradesh State Cooperative Marketing and Consumer's Federation, and the Himachal Pradesh Horticulture Produce Marketing and Processing Corporation, among others.

⁵ Source: “80,000 MT grade 'C' apples procured in Himachal, highest in 12 yrs.” [The Tribune](#); published on October 21, 2022.

Jammu and Kashmir maintains a MIS program for apple procurement by the National Agricultural Cooperative Marketing Federation. However, the program has rarely been applied as farmers have not utilized the program due to higher-than-expected prices above the MIS rate and reported bureaucratic complexities on the MIS implementation. Some private companies including Devbhumi, Reliance, and Adani Agri Fresh (Farm Pik) procure directly from farmers and operate their own warehouses and pricing schemes apart from government-controlled market yards.⁶

CONSUMPTION

Market year 2022/23 apple consumption in India is estimated at 2.6 MMT, roughly unchanged from last year. Approximately 60 percent is consumed fresh, while the remaining 40 percent consists of apples processed from lower quality domestic production. Apples are the most heavily consumed imported fruit, with consistent, year-round sales, and demand continues to outweigh production. Major factors fueling apple demand include increasing population, growing disposable incomes, health awareness, and fruit availability in the market.

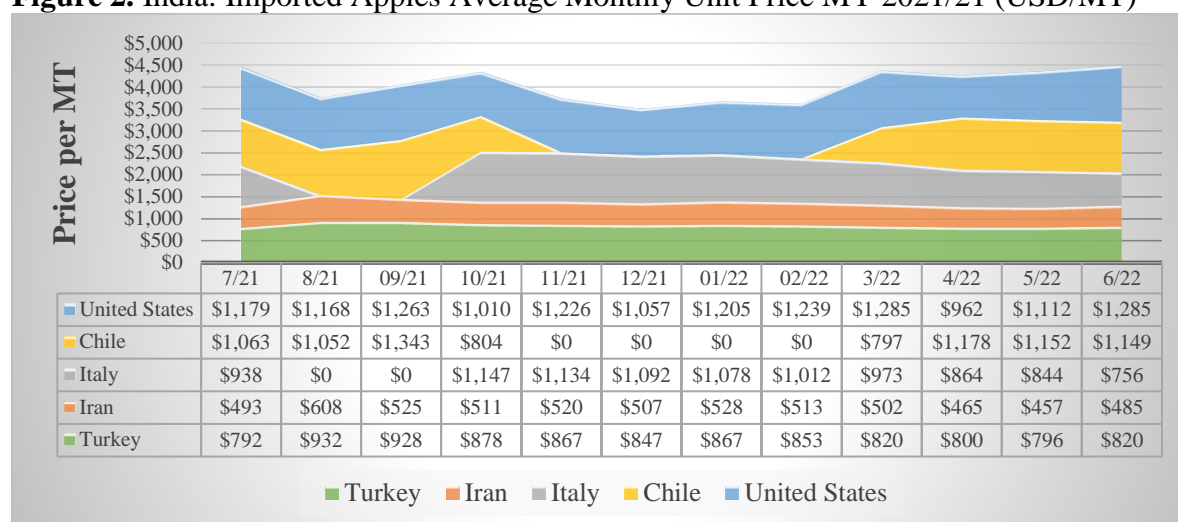
Marketing of domestic produce primarily occurs through traditional retail sectors (including unorganized fruit and vegetable vendors, pushcarts, and weekly markets) while modern retail outlets are slowly increasing market share. Domestically produced apples are mix-grade and primarily consumed in northern India urban areas due to limited cold chain infrastructure. All other Indian regions routinely confront distribution challenges for highly perishable domestic apples and must rely on imports throughout the year. As a result, imported apples enjoy a separate market compared to domestic produce due to improved shelf life, fruit quality, and sell at a higher price. Ensuring quality throughout the entire apple value chain, especially in smaller cities, remains a challenge due to limited refrigerated space and high energy costs.

PRICE

In market year 2021/22, the average metric ton price for imported fresh apples was as follows: U.S. \$1,158, Chile \$1,117, Turkey \$830, Italy \$913 and Iran at \$503 (Figure 2). U.S.-origin apple prices remain elevated due to the Indian government's applied retaliatory tariffs.

⁶ Farmers groups in the current MY have protested private sector price rates, which are attributed to significant domestic arrival of apples. See: HP apple growers dissatisfied with opening prices announced by Adani." [Hindustan Times](#); published on August 15, 2022.

Figure 2. India: Imported Apples Average Monthly Unit Price MY 2021/21 (USD/MT)



Note: \$0 indicates that no trade occurred during the month.

Data source: Trade Data Monitor.

TRADE

India’s apple imports for MY 2022/23 are forecast at 430,000 MT, a slight decrease from the previous year as significant domestic production will largely serve consumer demand. In addition, Post has revised the MY 2021/22 import figure to 448,000 MT, a new record, owing to increased imports from regional suppliers. Turkey became the dominant supplier in MY 2021/22 with a 26 percent market share, followed by Iran (23 percent), Italy (14 percent), and Chile (18 percent), respectively (Table 2).

Table 2. India: Apples, Fresh, Imports, MY 2019/20-2021/22 (MT)

Country	2019/20	2020/21	2021/22	Change %
World	194,128	376,728	447,938	19
Turkey	29,365	62,068	114,486	84
Iran	25,482	73,303	102,014	39
Italy	28,374	41,969	60,484	44
Chile	19,851	44,253	35,926	(19)
United Arab Emirates	2,236	36,953	29,298	(21)
New Zealand	14,841	25,442	28,044	10
Poland	10,555	4,492	17,076	280
South Africa	1,433	8,365	17,013	103
Brazil	6,647	22,164	11,642	(47)
United States	37,859	24,122	10,390	(57)
Belgium	3,803	1,403	7,396	427
Serbia	0	493	4,488	811
France	3,112	2,103	3,844	83
Afghanistan	6,228	26,728	1,487	(94)
All Others	4,341	2,871	4,350	51

Data source: Trade Data Monitor.

U.S. market share has continued to fall from 20 percent in MY 2019/20 to less than three percent in MY 2021/22. This decline is largely due to the Indian government’s retaliatory tariff of 20 percent on U.S. apples applied in 2019. An additional challenge impacting U.S. trade (and that of other origins) includes the Food Safety and Standards Authority of India’s requirement that imported apples must be accompanied by a certificate stating the product does not contain genetically modified (GM) organisms and is not of GM-origin. The Indian market primarily prefers *Red Delicious*, with southern India demonstrating a taste preference for *Gala* apples.

India’s apple industry asserted that lower quality Iranian-origin apples outpriced and displaced local production in MY 2021/22. Stakeholders claimed that the Iranian fruit was rebranded as Afghanistan-origin to avoid import duties under India’s free trade agreement.⁷ Himachal Pradesh and Kashmir producer groups both have requested that the Indian government ban Iranian apples during the current MY that are arriving under such conditions.⁸ As of October 29, 2022, the wholesale price of Himachal Pradesh/Kashmir-origin apples totaled INR 9,500/quintal, whereas Iranian apples have ranged between 8,000-8,500/quintal in the same period.⁹

Despite domestic grower concerns, Iranian apples are forecast to continue their strong export growth in the latter half of MY 2022/23 due shorter transit times against other origins, and demand for apples in southern markets during the lean season months. Turkish-origin apples will also maintain high market share, with distribution mainly limited to large, metropolitan areas.

India’s apple exports in MY 2022/23 are estimated to increase 40 percent to 45,000 metric tons. However, this growth is mainly short-lived, and the result of greater quantities of Indian-origin apples exported to regional buyers (Table 3).

Table 3. India: Apples, Fresh, Exports, MY 2019/20-2021/22 (MT)

Country	2019/20	2020/21	2021/22	Change (%)
World	22,165	30,273	32,090	6
Bangladesh	8,900	16,862	18,190	8
Nepal	12,741	12,827	13,107	2
Bhutan	0	325	365	12
United Arab Emirates	153	66	163	146
Greece	0	0	105	0
Iran	0	0	101	0
Saudi Arabia	75	28	24	(15)
Bahrain	16	10	10	2
All Others	279	154	25	(84)

Data source: Trade Data Monitor.

⁷ See: “Cheap Iranian import now threatening stored Himachal apples.” [Hindustan Times](#); published on January 8, 2022.

⁸ Indian apple growers have routinely raised concerns of Iranian apples flooding the local market since at least MY 2012/13. See USDA GAIN: 2013 Apple Product Brief; [IN2013-2009](#).

⁹ One quintal equals 100 kg. Prices are indicative of “Grade A” apples at the Mumbai wholesale market.

TRADE POLICY

Apple imports¹⁰ face a 50 percent basic customs duty with no import quantitative restrictions. U.S. origin apples remain subject to an overall duty of 70 percent, reflecting the additional 20 percent retaliatory tariff. Non-tariff barriers include the Indian government's non-GM/GM-free certificate requirement.¹¹ Exporting apples to India requires a phytosanitary certificate presented to Indian Customs. The Indian government's [Plant Quarantine Order 2003](#) establishes the conditions for importing planting seeds and agricultural products (including apples for consumption) into India.

COMMODITIES

PEARS, FRESH

Table 4. India: Commodity, Pears, Fresh, Production, Supply and Distribution (Area in Hectares, Quantity in Metric Tons, and Trees in Thousands)

Pears, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
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)	308000	308000	310000	310000	0	312000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	308000	308000	310000	310000	0	312000
Imports (MT)	22400	22400	20000	28300	0	28000
Total Supply (MT)	330400	330400	330000	338300	0	340000
Domestic Consumption (MT)	330300	330300	329900	338170	0	339900
Exports (MT)	100	100	100	130	0	100
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	330400	330400	330000	338300	0	340000

Data source: OAA New Delhi historical data series. Post forecast for 2022/23, estimates for 2021/22 and 2020/21.

PRODUCTION

Post forecasts India's MY 2022/23 (July-June) pear production at 312,000 MT, mostly unchanged from last year. This estimate assumes favorable weather conditions as well as fewer supply chain constraints in the pear value chain. Indian 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.

¹⁰ HS Code 080810.

¹¹ See: USDA GAIN India - Requirement of a Certificate of Non-Genetically Modified and GM-Free Status for Apple Consignments; [IN2021-0042](#).

Domestic production is limited mostly to the states of Punjab, Jammu and Kashmir, Uttar Pradesh, Uttarakhand, and Himachal Pradesh. Cultivated varieties vary based on altitude and region and include *Williams*, *Bartlett*, *Anjou*, *Patharnakh*, *Comice*, *China Pear*, and *Kashmir Nakh*, among others. Domestic pears are typically available from late summer to early winter.

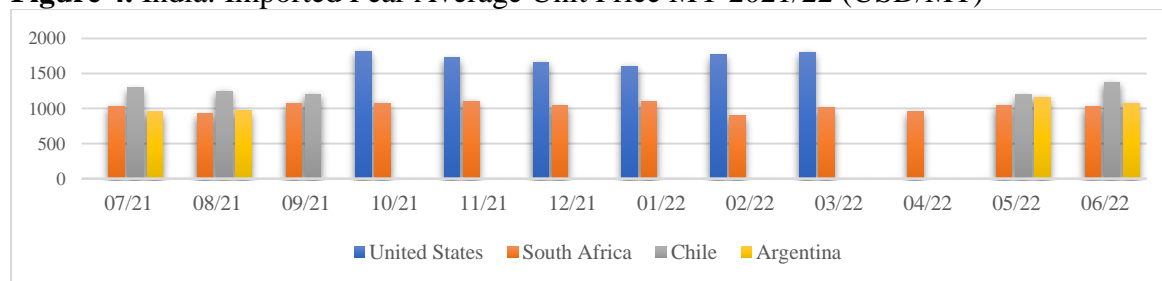
CONSUMPTION

India’s pear consumption is expected to remain mostly stagnant at 339,900 MT in MY 2022/23 owing to restrained availability of domestic pears outside of Northern India. Post also revises MY 2021/22 consumption higher to 338,170 MT to reflect market realities. India’s pear market growth potential remains high in the near term, as imports are necessary to meet growing consumer demand in metropolitan Tier 1-2 cities.¹² Pears are mainly consumed fresh, while pear processing remains miniscule at two percent of domestic production, due to cost.

Indian pears do not typically compete with imports as the harvest season typically concludes by October every year. U.S.-origin pears typically arrive in November and are sold through late March. *Green Bartlett* is the preferred U.S. pear variety, owing to its similarity to domestic pears. U.S. pears compete primarily with South African (*Packham*, *Forelle* varieties) and Chilean (*Packham*) pears in India. The lack of a fully integrated cold chain infrastructure and limited pear processing capabilities continue to limit greater market penetration.

PRICE

Figure 4. India: Imported Pear Average Unit Price MY 2021/22 (USD/MT)



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

Market year 2020/21 average unit price for imported U.S. fresh pears was \$1,679/MT and South Africa at \$1,026/MT. Pear prices for Argentina and Chile were at \$1,006/MT and \$1,272/MT, respectively.

TRADE

Pear imports in MY 2022/23 are projected to reach 28,000 MT, as relatively flat domestic production will remain insufficient to meet demand. Post revises the MY 2021/22 import figure to 28,300 MT to reflect market realities. South Africa was the dominant exporter in the last marketing year and accounted for 88 percent of India’s fresh pear imports. Chile, with a five

¹² Indian cities are classified into “tiered” (1-5) categories with the most developed cities (Mumbai, New Delhi, Bangalore) deemed “Tier 1.”

percent share, was the second largest exporter to India, followed by Argentina and the United States with three and two percent share, respectively (Table 5). India retains its 2017 ban on Chinese pears in the market, but products are reportedly found in various fruit markets under different labels. In August 2022, the Indian government approved a new phytosanitary protocol that allows in-transit cold treatment for South African pears that will likely lead to increased exports to India.¹³

Industry sources report that shrinking demand for higher priced U.S. apples have led to a corresponding sluggish appetite for U.S. pears given their high price, as indicated in Figure 4. The negative cross-price elasticity for U.S. pears suggests that India’s retaliatory tariff on U.S. apples have also affected market dynamics for U.S. pears. Despite a reduction in shipping container costs from those that prevailed in 2020 and 2021 that had previously impacted long-distance markets like India, export competition from lower priced South African pears will continue to limit U.S. exports.

Table 5. India: Pears, Fresh, Imports, MY 2019/20-2021/22 (MT)

Country	2019/20	2020/21	2021/22	% Change
<i>World</i>	17,392	22,400	28,279	26
South Africa	12,593	18,335	25,017	36
Chile	131	661	1,339	103
Argentina	221	448	830	85
United States	2,345	1043	544	(48)
United Arab Emirates	708	466	370	(21)
All Others	1,394	1,448	180	(88)

Data source: Trade Data Monitor.

India’s pear exports are limited with negligible volumes primarily shipped to Bhutan (102 MT) and the United Arab Emirates (28 MT) in MY 2021/22. Exports in the forecast year are forecast at 100 metric tons.

TRADE POLICY

The applicable fresh pear basic customs duty (HS Code 080830) is 30 percent, with no quantitative restrictions. The Indian Government Plant Quarantine Order 2003 regulates planting seeds and agricultural product imports (including fresh pears for consumption) into India.

¹³ The phytosanitary protocol also allows for in-transit cold treatment for South African apples. Source: “RSA TopFruit sector strikes ground-breaking deal in India.” [Fruitnet](#); published on August 22, 2022.

COMMODITIES

GRAPES, TABLE, FRESH

Table 6. India: Commodity, Grapes, Fresh, Production, Supply and Distribution (Area in Hectares, Quantity in Metric Tons, and Trees in Thousands)

Grapes, Fresh Table	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jun 2020		Jun 2021		Jun 2022	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	140000	140000	142000	142000	0	142000
Area Harvested (HA)	130000	130000	140000	140000	0	141000
Commercial Production (MT)	2300000	2300000	2900000	2900000	0	2850000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	2300000	2300000	2900000	2900000	0	2850000
Imports (MT)	6600	6600	8000	8000	0	9000
Total Supply (MT)	2306600	2306600	2908000	2908000	0	2859000
Fresh Dom. Consumption (MT)	1830020	1830020	2305000	2285000	0	2270000
Exports (MT)	267200	267200	255000	275000	0	270000
Withdrawal From Market (MT)	209380	209380	348000	348000	0	319000
Total Distribution (MT)	2306600	2306600	2908000	2908000	0	2859000

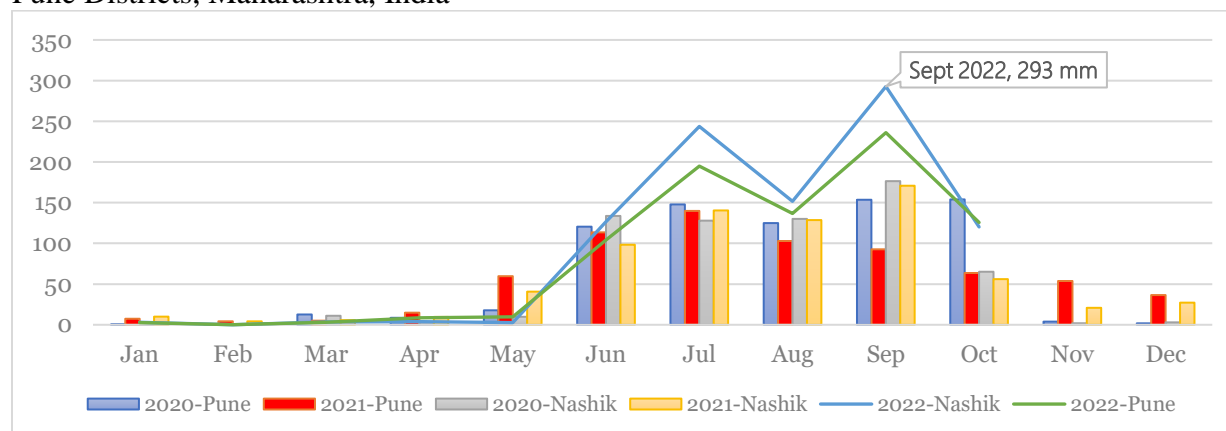
Data source: OAA New Delhi historical data series. Post forecast for 2022/23, estimates for 2021/22 and 2020/21.

PRODUCTION

Post forecasts India's MY 2022/2023 (June-May) fresh table grape production at 2.85 MMT under 141,000 harvested hectares, a two percent reduction over last year. This slight production decrease is attributed to abnormal, heavy precipitation in the grape growing regions of Maharashtra and Karnataka. Heavy precipitation in September-October 2022 has reportedly led to washouts and crop loss for some grape growers, who for the second consecutive marketing year, have experienced rainfall above historical norms (Figure 5).¹⁴ Like last year, extreme climatic conditions will again lead to delayed pruning and higher than normal temperatures during the shorter harvesting period (from the typical 90 days to 70), will likely lead to some degree of lower fruit quality. Despite these predicaments, grape production is expected to recover with adequate yields and good fruit fullness during the February-April harvest period.

¹⁴ See: "Maharashtra receives over 41 lakh claims for crop loss." [The Indian Express](#); published on October 18, 2022.

Figure 5. India: Calendar Year 2020-2022 Monthly Precipitation (Millimeters) – Nashik and Pune Districts, Maharashtra, India



Notes: Nashik and Pune are among the major table grape growing regions in Maharashtra. This satellite-derived weather data is from the U.S. Air Force (USAF) 557th Weather Wing.
 Source: USDA Global Agricultural and Disaster Assessment System ([GADAS](#)).

Maharashtra is the primary region for Indian grapes (including raisins and wine grapes) and accounts for approximately 78 percent of total domestic production, followed by Karnataka at 18 percent, with limited production in Telangana, Andhra Pradesh, and Tamil Nadu. Maharashtra’s high grape production is largely supported by drip irrigation infrastructure. Coupled with insufficient cold chain transport and infrastructure, producers are increasingly turning to raisin production due to high demand in both domestic and exports markets.¹⁵ Diversion toward raisin production fluctuates between nine to 20 percent based on domestic table grape prices.

India’s table grape area under production in the forecast year is expected to remain flat at 142,000 hectares following reports of limited cultivation expansion. There are more than 20 grape varieties under cultivation in the country. *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*, *Arkavati*, and *Sonaka* are also common varieties for raisin production.

CONSUMPTION

Post forecasts MY 2022/23 Indian table grape consumption to remain flat at 339,900 MT. Domestic production, which traditionally constitutes about 80 percent of consumer demand, remains limited by insufficient cold chain networks to expand to a greater consumer base. Future drivers impacting table grape consumption development include rising health awareness and disposable incomes for purchasing fruit, as well as consumption of processed products such as raisins, juices, and jams. Imported grapes are mostly found in brick-and-mortar retail and accessible only to more affluent consumers, compared to domestic grapes found in traditional markets and pushcart vendors. Continuing high food price inflation and a weakened Indian rupee

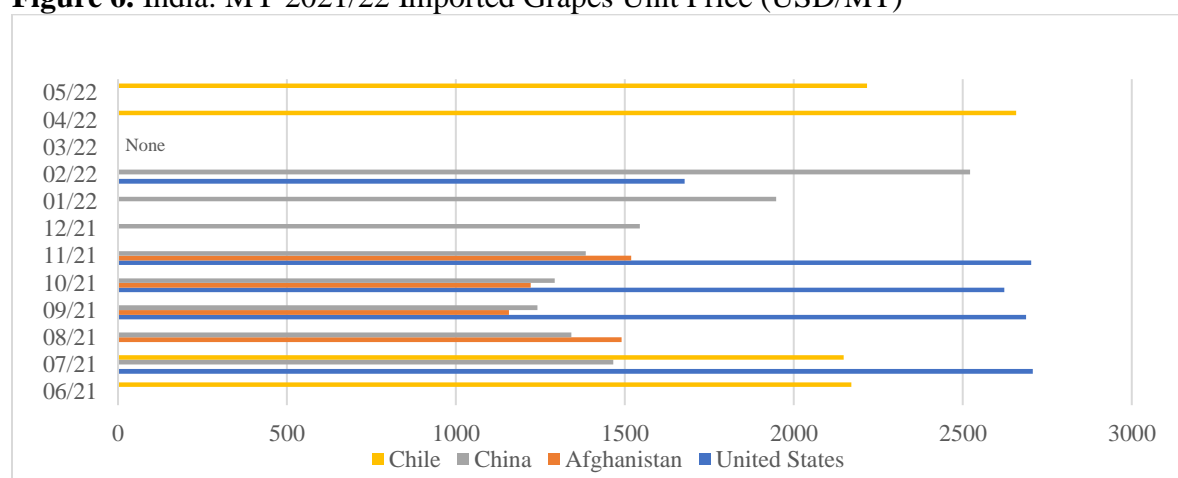
¹⁵ The raisin industry is mostly confined to the Sangli, Solapur and Nasik districts of Maharashtra, which utilizes lesser-quality, thin-skinned grapes for production. India in MY 2021/22 imported 29,300 MT of raisins, mostly from Afghanistan, but exported 22,100 MT in the same period.

are also likely to prevent expanded table grape consumption to lower-income consumers in the near term.¹⁶

Table grape utilization for Indian wine production will become a significant demand driver this decade. According to industry reports, India’s wine market is forecast to reach \$274 million from 2021-2026, with domestic production heavily contributing to this growth.¹⁷ While wine constitutes approximately 3-4 percent of India’s overall area under grape cultivation, new vineyards and a rapidly evolving industry with high consumer demand will likely see an increase in wine grape cultivated area and production.¹⁸

PRICE

Figure 6. India: MY 2021/22 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 typically sold in India from July to December. In market year 2021/22, Chilean-origin grapes gained the highest price premium, averaging \$2,392/MT compared to \$2,030 for the United States, \$1,391/MT for China, and \$1,271/MT for Afghanistan.

TRADE

Assuming stable supply chains and sufficient domestic grape availability, Post forecasts exports in MY 2022/23 at 270,000 MT, two percent below MY 2021/22. A shortened harvesting season, coupled with higher production costs for growers and diversion to raisin production are factors hindering export growth. Producer groups have alleged that the Indian government’s export

¹⁶ India’s year-on-year inflation rate for fruits in September 2022 reached 5.7 percent, down from 7.39 percent in August 2022. Source: [Consumer Price Index Numbers on Base 2012=100 for Rural, Urban and Combined](#). Ministry of Statistics and Programme Implementation, Press Information Bureau, Government of India.

¹⁷ Source: “Wine Market in India by Sales Type and Wine Type - Forecast and Analysis 2022-2026.” [Technavio](#); published August 2022.

¹⁸ India’s wine industry estimated a 20 percent growth (year-on-year) of domestic wine sales in Indian fiscal year 2021/22 (April-March) suggesting increased demand for higher quality wines. See: “1,000-acre increase planned in wine grape production.” [Times of India](#); published on March 15, 2022.

subsidy through the Remission of Duties and Taxes on Exported Products (RoDTEP) program¹⁹ is insufficient to cover packaging and transportation costs. Additionally, growers have claimed that the Indian government's January 2022 decision to remove its export subsidy may deter exports.

India exported approximately 275,000 MT of table grapes in MY 2021/22 (Table 7). By volume, nearly 32 percent of grape exports went to Bangladesh and various European Union member states, respectively. Indian grape exporters are increasingly looking toward regional markets, including China, due to continued shipping constraints stemming from the Russian invasion of Ukraine.

Table 7. India: Table Grape Exports, MY 2019/20-2020/21 (MT)

Country	2019/20	2020/21	2021/22	Change %
<i>World</i>	185,264	267,176	275,110	3
Bangladesh	32,877	72,333	88,721	23
Netherlands	53,139	71,606	77,757	9
Nepal	6,044	16,708	18,394	10
United Arab Emirates	12,274	13,699	17,970	31
Russia	22,683	24,364	16,463	(32)
United Kingdom	13,662	19,466	13,458	(31)
Saudi Arabia	10,164	9,293	5,972	(36)
Germany	7,306	7,106	5,967	(16)
All Others	27,113	32,602	30,406	(7)

Data source: Trade Data Monitor.

Post forecasts table grape imports to rise to 9,000 MT for MY 2022/23 to augment consumer demand during months of limited domestic supply. By volume, China was the dominant supplier to India with a 70 percent market share in MY 2021/22, followed by Afghanistan (19 percent) and Chile (seven percent) (Table 8).

Table 8. India: Table Grape Imports, MY 2019/20-2021/22 (MT)

Country	2019/20	2020/21	2021/22	Change %
<i>World</i>	7,341	6,589	7,915	20
China	4,832	4,305	5,547	29
Afghanistan	679	949	1,521	60
Chile	302	283	512	81
Italy	120	18	81	359

¹⁹ The RoDTEP program supports exporters by providing tax refunds on the exportable product, in addition to a basic customs duty refund on imported products up to a certain percentage. Indian fresh grapes (08061000) are assessed at a three percent refund rate.

Australia	191	208	73	(65)
United States	621	235	8	(96)
Others	597	591	173	(71)

Data source: Trade Data Monitor.

TRADE POLICY

There are no quantitative restrictions on fresh grape (HS Code 080610) imports and this fruit is assessed a 30 percent basic customs duty. Grape imports into India require a phytosanitary certificate be presented to Indian Customs during clearance. The Indian Government's Plant Quarantine Order 2003 conditions regulate the import of planting seeds and agricultural products (including fresh grapes for consumption) into India.

Attachments:

No Attachments