

Grapes Value Chain Analysis - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 70 pages | Mordor Intelligence

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Report description:

The grape value chain analysis is projected to register a CAGR of 5.2% during the forecast period (2022-2027). All linkages in the value chain were affected by the COVID-19 pandemic. The complete lockdown affected the use of labor in all stages of the value chain ranging from the farming activities from planting, inter-cultivation, and harvesting, to the transportation of produces in various stages of the value chain. The local markets were also affected in some cases where there were restrictions on bringing the product to a common marketplace. The slowdown in the movement of the produces increased the wastages in the absence of adequate cold storage facilities for the perishable commodities. However, with the upliftment of the restrictions and the various strategies adopted by governments of countries across the globe, the negative impact of the pandemic on the value chain of grapes has slowed down.

Grapes are one of the largest fruit crops cultivated across the world. According to a report by the US Department of Agriculture's Foreign Agricultural Service, global table grape production in 2020 reached approximately 24.7 million metric tons. In general, table grapes and wine grapes are the two major types of grapes grown across the world, out of which table grapes are freshly consumable grapes.

The global consumption of grape wine was also stable in 2018, with large vineyards in Spain, followed by China and France. The demand for table grapes is growing globally, particularly in Asia-Pacific, the Middle-East, and Russia. China, Italy, the United States, France, and Spain are the major grape-producing countries, whereas Chile, Italy, the United States, Afghanistan, and South Africa are the major grape exporting countries. The United States, the Netherlands, Germany, Russia, and the United Kingdom are the major importing countries. The average price of grapes in the domestic markets is USD 4.16/kg, and the average price in the import market is USD 5.18/kg. This value addition is mainly due to the involvement of additional stakeholders, such as exporters and importers.

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Grapes Value Chain Market Trends

Increasing R&D Activities to Develop New Varieties of Grapes

The different varieties of table grapes are broadly classified into three groups, namely red, black, and green. Thompson seedless grape (sultana) and red globe are two of the most grown varieties. Recently, the flare-up in the production of varieties, such as the red globe, has resulted in the rapid decline of prices for these varieties. This encourages producers to cultivate club varieties, thereby insulating themselves from competition that ultimately results in high-profit margins. In order to increase the availability of different varieties of grapes, private firms are mostly engaged in research and development activities. For instance, in March 2022, Cornell AgriTech and Sun World International launched the collaboratively developed two new grape varieties called Sugrafiftytwo and Sugrasixty. The varieties, developed collaboratively between Cornell AgriTech and Sun World International, offer new flavors for consumers and better growing characteristics for farmers.

Developing new varieties requires significant investment and experimentation in the field. The R&D activities are mostly being carried out in California by public and private firms for future development in the grape market. Some well-known firms include International Fruit Genetics (IFG) and SunWorld, which have adopted cutting-edge research on the development of new varieties. For example, IFG recently created the Cotton Candy grape variety from two different grape species. These organizations license the production of their varieties. So, the producers are responsible for paying the royalties.

China Dominates the Production of Grapes

China dominates the grape production in the world. China produced approximately 14 million tons of grapes and remained the largest grape-producing country in Asia-Pacific, comprising approximately 66% of the total volume. Xinjiang autonomous region is the major grape production area in China. In 2020, approximately 3.06 million metric tons of grapes were produced in Xinjiang, more than two times the amount of grape output in Hebei province, the second-largest grape producer in the country. The pandemic had a negative impact on the entire value chain of the grapes in China. Planters, importers, exporters, and retailers observed a shrinking margin. However, China was one of the markets that recovered from the pandemic relatively quickly. Guangdong HolyFresh Fruit majorly exports around 900 shipping containers to Southeast Asia, the Middle East, and South Asia. Their main export varieties include Red Globe, Sunshine Rose, Summer Black, Crimson, Seedless white, and Freisa.

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