

## **Grapes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Grapes Market Analysis

The grapes market size is valued at USD 104.0 billion in 2025 and is forecast to reach USD 135.0 billion by 2030, advancing at a 5.36% CAGR over the period. Rising appetite for premium seedless varieties, a pivot toward functional ingredients, and steady investments in precision viticulture support this trajectory. Increasing cold-chain reach in emerging economies curbs post-harvest losses, while climate-resilient breeding programs preserve productive acreage in heat-stressed zones. Retailers that focus on environmental metrics encourage organic certification, and technology adoption lowers labor intensity amid acute worker shortages. Strategic divestitures by multi-brand beverage firms shift value toward specialized growers that pair terroir stories with direct-to-consumer channels.

Global Grapes Market Trends and Insights

Premiumization of Table-Grape Varieties

Retail audits show a 15-25% price premium for proprietary seedless cultivars that guarantee crunch, high Brix, and extended shelf life. Seven-year breeding cycles for selections such as Jupiter illustrate the capital and patience needed to secure trademarks that defend shelf space. Retailers now require optical sizing and modified-atmosphere punnets, raising the baseline for post-harvest technology. As climate variability tightens harvest windows, breeding programs also emphasize heat tolerance to protect flavor integrity across the grapes market.

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## Surge in Functional Grape-Based Nutraceuticals

Polyphenol concentrates earn wholesale prices above USD 50 per kilogram, around twenty times fresh-fruit equivalents, motivating processors to invest in super-critical CO<sub>2</sub> lines that meet pharmaceutical standards. United States Food and Drug Administration GRAS status eases product registration, while direct farm contracts secure high-anthocyanin varieties. This dynamic nudges growers to select clones with thicker skins, reinforcing vertical integration opportunities inside the grapes market. Dedicated polyphenol processing hubs are now forming near major table-grape clusters in California and La Rioja, cutting raw-material haulage costs and tightening quality control. Early-stage venture funding is also flowing into startups that apply membrane filtration to boost extract yields by up to 15%, a gain that lifts processor margins and widens the addressable space for functional beverages.

## Escalating Labor Shortages in Vineyards

California and Spanish wage bills rose 25-35% in one year as workers shifted to logistics and construction. Robotic harvest units priced at USD 200,000-500,000 remain viable only for blocks above forty hectares, disadvantaging artisanal estates that rely on hand picking. Seasonal-visa caps in the United States trimmed available crews by 18% for the 2025 harvest, forcing growers to leave premium clusters unpicked. Cooperative hiring pools are emerging in Spain's Ribera del Duero to share skilled pruners across neighboring estates, but travel allowances inflate total labor costs and tighten already thin margins.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Cold-Chain Logistics in Emerging Economies / Growth in Organic Certification Acreage Price premiums / Stricter Maximum Residue Level (MRL) Compliance /

For complete list of drivers and restraints, kindly check the Table Of Contents.

## Segment Analysis

The Grapes Market Report is Segmented by Geography (North America, Europe, Asia-Pacific, South America, Middle East, and More). The Report Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

## Geography Analysis

Europe retains 32.5% of 2024 consumption, anchored by protected designations and premium wine pricing. Organic acreage climbs 12-15% annually, and common agricultural policy funds subsidize regenerative practices, yet 2024 heat waves trimmed Mediterranean yield. Growers add shade nets and deficit irrigation to sustain output. Breeders in Spain and Italy are fast-tracking heat-resistant rootstocks that preserve acidity under 40 C field conditions, protecting flagship appellations. Meanwhile, tighter maximum residue rules push cooperatives to install centralized testing labs, a move that lowers per-sample costs for smallholders and keeps exports compliant with Northern European supermarket contracts.

Asia-Pacific registers the fastest regional CAGR at 7.0% through 2030. China's 12.6 million metric tons harvest leads output, yet domestic demand absorbs volume, opening import windows for Australian and Peruvian exporters. India's 2.85 million metric tons crop relies on upgraded pack houses that meet European retailer specs. Varietal programs in Australia pivot to drought-tolerant clones, keeping the grapes market resilient as rainfall declines. E-commerce grocers in South Korea and Japan now bundle

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premium seedless boxes with next-day delivery, widening urban penetration and lifting average selling prices. Regional cold-chain spending is projected to top USD 5 billion by 2027, a build-out that secures longer shelf life for counter-seasonal shipments into Southeast Asian megacities.

North America posts a 4.6% CAGR to 2030 despite California's smallest red-grape harvest in twenty-two years. Mechanized pruning and regenerative trials in Mexico and Canada buffer the regional grapes market against labor and climate shocks. Washington State is expanding high-density trellis systems coupled with drip fertigation, a shift that raises yield per acre and trims water use by 18%. In British Columbia, growers employ wind machines and multi-row netting to guard buds after the 2024 winter kill, a strategy that restores partial output while longer-term replanting takes place.

List of Companies Covered in this Report:

Market Overview / Market Drivers / Market Restraints / Value/Supply-Chain Analysis / Regulatory Landscape / Technological Outlook / PESTEL Analysis / List of Key Stakeholders /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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