

Producer country file

The table grape in India

by Cécilia Céleyrette

Grape production in India is continuing its development, to supply growing world demand. The industry has set itself some ambitious objectives, hoping to triple its production by 2050. So surface areas have seen a big rise over the past twenty years, though it is above all improved cropping techniques which are currently enabling better productivity and access to the international markets. While this origin is highly competitive, its development was curbed in the early 2010s by phytosanitary constraints, forcing the authorities to implement strict protocols and encourage producer training.



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Table grape – India

Location

Grape cultivation is an ancient activity in India, apparently introduced by the Persians in the north of the country, from where it then spread to the main southern production zones. Northern India (Punjab, Haryana and western Uttar Pradesh) is characterised by a subtropical climate. The production period there is restricted since vegetation starts in early March and the rains arrive in June, which leaves just 90 to 95 days between development and harvest. The Maharashtra region in the west of the country is the main production zone. It enjoys a tropical climate, though it suffers

from water salinity and drought, although irrigation is under development. It also has big temperature variations (from 8°C to 42°C), which promote fruit coloration, or even a slight blush. It is the main production zone for Thompson Seedless and its mutants. The Karnataka zone, in the south of the country, is the number two production region. It is also characterised by a tropical climate, just like the Andhra Pradesh and Tamil Nadu regions. However temperature differences are less pronounced (from 12°C to 36°C) than in the Maharashtra region, enabling two harvests per year.



Table grape – India

Production

Surfaces areas in India have seen a big increase over the past twenty years, going from 40 000 ha in 1998, to more than 100 000 ha in 2010 and nearly 140 000 ha today, of which 138 000 ha already in production. They are now stabilising, though productivity is continuing to increase thanks to the implementation of a complete set of practices such as varietal selection and compatible rootstocks, producer training, optimisation of cropping techniques, development of irrigation and disease management in accordance with the standards in place on the international markets. Hence the farmers take part in workshops and courses on parasite management in conjunction with companies with an international presence. So India within the space of ten years has become the world no. 2 grape producer country, behind China (more than 6 million tonnes) and ahead of Turkey (less than 2 million tonnes). The potential is currently 3 million tonnes, though this should increase further in the coming years.



Table grape - India - Evolution of planted areas
(in 000 hectares / sources: FAO, USDA)

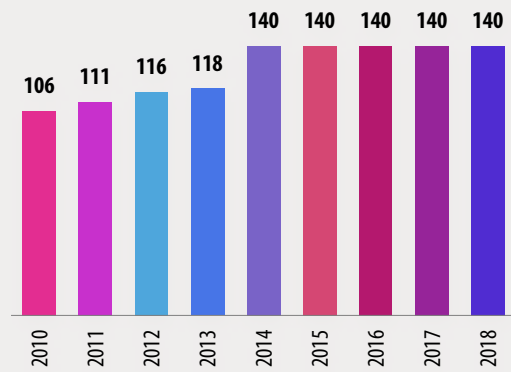


Table grape - India - Evolution of production
(in 000 tonnes / sources: FAO, USDA)

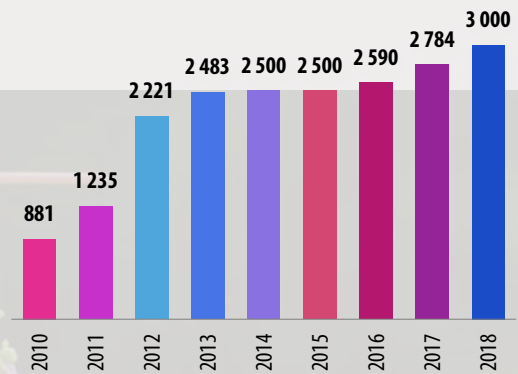


Table grape – India

Production calendar and varieties

The Thompson Seedless variety, and its mutants (Sonaka Seedless, Tas-A-Ganesh, and Manik chaman), remains the main variety of the Indian table grape stock. On its own it represents 50 % of production, and is the main export variety. Bangalore Blue (Isabella) is another icon of Indian production, and in 2013 received a geographic indication. Other coloured varieties such

as Sharad (black seedless) or Jumbo have expanded the export varietal range, with in addition some Flame Seedless, Crimson Seedless and Red Globe. The stock also includes some varieties aimed rather at the local market, such as Perlette, Gulabi (Black Muscat) or Anab-e-Shahi. The production period extends year-round, especially since certain regions carry out two

harvests per year. The campaign starts in the early zones at the beginning of the year, or even in December for very early varieties, though the vast majority of volumes is harvested between February and April in the Maharashtra zone. Tests are currently being conducted on ten or so varieties in order to select two or three to replace Thompson Seedless.

Table grape — India — Production calendar

Varieties	S	O	N	D	J	F	M	A	M	J	J	A
Thompson Seedless and mutants												
Bangalore Blue (Isabella)												
Gulabi (Black Muscat)												
Anab-e-Shahi												
Bhokri												
Perlette												

Source: ICAR

Table grape - India
Breakdown of exports in 2016-17

(sources: ADEPA, Comext)

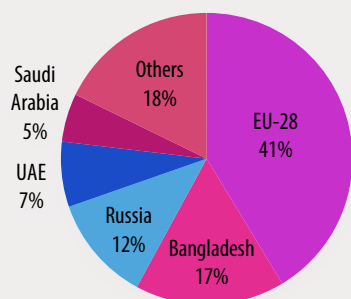
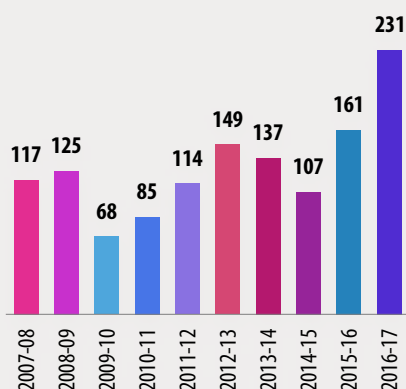


Table grape - India - Exports

(in 000 tonnes / sources: ADEPA, Comtrade)



Exports

Indian grape exports saw regular growth until 2010, but were temporarily slowed due to Chloromequat exceeding the MRL. Adaptation of production practices and the inspections performed by ADEPA, within what is now a very strict protocol since 2016, has enabled shipments to the European Union to resume. So tonnages increased very steeply

again in 2015-16 and 2016-17. This campaign, exporters actually hoped this campaign for an 18 % increase on 2016-17, i.e. an expected record of 272 000 t. Europe remains the main outlet for Indian production, with 40 % of total exports in 2017, i.e. 95 500 t (+ 19 % on 2016), on top of which 27 000 t must be added for Russia (+ 96 %). Other destinations are becoming more important in the customer portfolio of Indian exporters, such as the Middle East or Asia. In particular there is strong demand for the black table grape in China, Hong Kong, Thailand, Malaysia and Singapore. However several of these countries have decided to introduce stricter regulations in terms of phytosanitary residue monitoring.

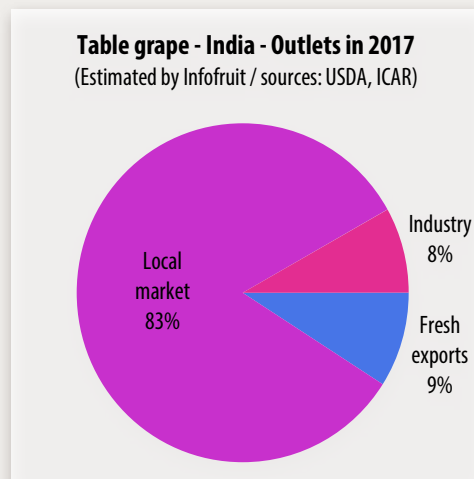


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Table grape – India

Outlets

The bulk of Indian table grape production is consumed on the local market. Only approximately 10 % of production is currently exported, while a small part is processed, especially into raisins, and a very small proportion into juice.



Logistics

Exports are made primarily out of Jawaharlal Nehru Port and its container terminal Nhava Sheva. This is the biggest port in India. It serves primarily the districts of Madhya Pradesh, Maharashtra, Gujarat, Karnataka and the majority of the northern Indian production zones. However, India's infrastructures remain a brake on export growth.

Table grape — India — Sea-freight logistics to EU

Port of departure	Port of arrival	Transit time
Jawaharlal Nehru Port	Gioia Tauro (Italy) Thamesport (UK) Hamburg (Germany) Antwerp (Belgium)	15 to 21 days