

The European market potential for table grapes

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As one of the largest fruit categories, the European market for table grapes is very mature. Grape companies that anticipate trends such as seedless grapes and sustainable packaging are most likely to do well in large markets like the United Kingdom and Germany.

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1. Product description

Most imported grapes (scientific name: *Vitis vinifera*) are table grapes destined for fresh consumption. This study uses data on fresh table grapes and other grapes.

Table 1: Product code and varieties

| | |
|---------------------------------|--|
| Harmonised System (HS) code | 080610 Fresh grapes |
| Commercial cultivars (examples) | <p>Seedless</p> <ul style="list-style-type: none">• White-green: Autumn Crisp, Early Sweet, Thompson, Sweet Globe, Timpson, Ivory, Sugraone, Regal, Centennial, Cotton Candy• Red: Crimson, Flame, Ruby, Sweet Celebration, Timco• Black/blue: Summer Royal, Melody, Autumn Royal, Sable Seedless <p>Seeded</p> <ul style="list-style-type: none">• White-green: Italy• Red: Red Globe, Victoria Red• Black: Sweet Jubilee |

Many different kinds of table grapes are available, varying from white-green to red and dark blue. In Europe, the seedless varieties are most popular for consumption, such as the white-green Thompson and Sweet Globe, and the red Crimson, Flame Seedless and Ruby. There is a wide range of new varieties, complementing or replacing the older existing varieties. Most of these grape varieties are produced under license. The seeded varieties are in decline (see trends chapter), but still widely cultivated and available.

Figure 1: Sun World International's table grape varieties

Source: [Sun World International @ YouTube](#)

2. What makes Europe an interesting market for table grapes?

Table grapes are among the most in-demand fruits in Europe. The market is mature, and consumption is relatively stable. Grape import takes place year-round and will gradually increase due to declining production in Europe.

Grapes are popular in Europe

[Table grapes are among the most consumed fruits](#) in Europe. The market is mature, with large volumes and a relatively stable demand all year round. This means there are several supply windows throughout the year when you can step in and meet the demand.

Source: UN Comtrade

*Developing countries following [the OECD-DAC list of ODA recipients](#). "Rest of the world" refers to all other countries.

European imports of fresh grapes grew from 1,659 thousand tonnes in 2019 to 1,709 thousand tonnes in 2023, after peaking at 1,832 thousand tonnes in 2022. This translates to a modest compound annual growth rate (CAGR) of 0.7%.

Fresh grape imports from developing countries grew from 718 thousand tonnes in 2019 to 791 thousand tonnes in 2023, at a CAGR of 2.4%. As a result, their import market share grew from 43% to 46%. This shows that Europe can be an interesting market for you as an exporter from a developing country.

Table grapes are also commonly grown in Europe, both commercially and privately. This domestic production is supplemented with imports. In 2019, table grape production in the European Union reached 1.7 million tonnes. By 2023, this output had declined to around 1.55 million tonnes, due to adverse weather conditions and increased production costs.

On average, the annual imports of fresh grapes to Europe grew from 3.22 kg per person in 2019 to 3.25 kg in 2023. The highest consumption per person takes place in the production countries in Southern Europe.

Supply shortages in Europe can temporarily increase the need for external supply, and oversupply is relatively easily absorbed. Retail promotions for (in-season) grapes are common.

Tips:

Stay up to date by subscribing to newsletters and platforms like [Fruitnet](#), [FreshFruitPortal](#) and [Freshplaza](#) that provide regular updates on the global grape market.

Visit [Fruit Logistica](#) in Berlin, the largest trade fair for fresh produce in Europe.

The European table grape production is decreasing

Europe is the largest grape producing region/country in the world, and a top-five producer of table grapes. But production costs in Europe are increasing and growing grapes is becoming less profitable. This creates opportunities for competitive non-European suppliers, even if their production overlaps with the European season (July to November).

Source: United States Department of Agriculture (USDA) - [Foreign Agricultural Service](#)

According to the USDA, Europe produced nearly 1.3 million tonnes of fresh table grapes in 2023. This is a lot less than in 2010, when production was more than 2.0 million tonnes – a clear downward trend. Climate change will play an increasing role in European grape production. But production volumes have recently been under pressure from increasing costs and labour shortages as well.

Italy, Spain and Greece are the main producers of table grapes for the European supply. Italy is Europe's main supplier with a relatively stable production of around 1 million tonnes per year. However, [Italian production was considerably less in 2023](#). This was due to 2 years of drought and high temperatures, and downy mildew caused by rainfall in May and June. In addition, many seeded grape plants in Puglia have recently been replaced with newer seedless varieties.

Supply window opportunities for developing countries

When European production is good, it has a positive trade balance as it exports more than it imports. This happens most often in August and September. Europe mainly imports table grapes between December and May. This window should be the main focus for most non-European suppliers.

With European production declining, the demand for imported grapes may grow, especially early and later in the local season (June or November). Strong performance in 2023 by countries like Egypt and Brazil – who are active at the start and finish of the European season – suggests possible opportunities. Growers in Spain and Italy are responding by including late varieties that extend their seasons.

3. Which European countries offer the most opportunities for table grapes?

In 2023, the Netherlands was the main importer of fresh grapes from developing countries and functions as an important trade hub. Germany and the United Kingdom follow, with large domestic markets. These countries offer opportunities. Spain's fresh grape imports from developing countries are growing rapidly, suggesting the country may also become a transit hub.

Source: UN Comtrade

Germany and the Netherlands are Europe's leading importers of fresh grapes, with a market share of 20% each. The United Kingdom follows with 15%. Together, these countries represent more than 50% of total European imports in 2023. That share has been consistent in all of those years.

Note that we only discuss import volumes here. We do not take consumption into account as an indicator for market selection, since import volumes are key in the selection of priority markets for table grape exporters from developing countries.

Germany: the largest European import market

By maintaining a relatively strong performance in 2023, Germany has regained its position as Europe's leading importer of fresh grapes. Imports grew from 322 thousand tonnes in 2019 to 347 thousand tonnes in 2023, at a CAGR of 1.8%. This included a peak of 356 thousand tonnes in 2022.

Imports from developing countries grew from 126 thousand tonnes to 165 thousand tonnes, at a CAGR of 6.9%. As a result, their direct import market share grew from about 39% to 47%. This now makes it comparable to the European average, which is encouraging.

Italy is Germany's leading supplier, although its market share dropped from 36% to 29%. South Africa follows with 19% (up from 16%) and India with 11% (up from 8%). Spain provides a further 8% (down from 13%), and Egypt 6% (up from 4%). This illustrates the relatively strong performance of developing countries in this market. Other suppliers from developing countries include Peru (4.6%), Brazil (3.2%), Namibia (2.7%), Chile (2.4%) and Morocco (1.0%). These countries increased their market shares, except for Brazil.

[Grapes are Germans' 4th favourite fruit](#), with 71% eating them at least sometimes. Only apples, bananas and strawberries are more popular. In 2023, more than 90% of the total import volume stayed in the country. This makes Germany the largest European market for fresh grapes. Germany's consumption peaks during the European season (July to November).

There are opportunities in the German market for premium varieties as well as organic grapes. Several Italian growers have already entered the organic niche market. But most of the market is driven by price and volume. Discounters are increasingly dominating the market, working with smaller margins. Most large food retail chains have a discount concept, such as Netto of the Edeka-Group, Penny of the Rewe-Group, and Lidl of the Schwarz-group.

German retailers are among the strictest buyers in terms of requirements, including the allowed level of pesticide residues. At the same time, they expect a reliable economic offer. This means you can potentially sell significant volumes to these retailers if your product meets all the requirements. Most of the overseas imports for supermarkets are seedless table grapes. In the near future, you can expect to see sustainable and plastic-free packaging. To supply the German market, you must come prepared and show buyers how you reduce residues and unsustainable packaging.

Tips:

Try to get into a supply contract with a supermarket or discounter for a reliable supply and a stable price. But be prepared for extensive paperwork such as filling in your actions on food safety and sustainability. You also may have to submit your pesticide spraying registers.

Adopt different quality and sustainability standards to enter the German market. Read more about these standards in our studies on [buyer requirements for fresh fruit and vegetables](#) and [exporting fresh fruit and vegetables to Germany](#).

The Netherlands: a trade hub for re-export across Europe

Despite being a relatively small country, the Netherlands is among Europe's largest importers of fresh grapes. This is due to its role as a key trade hub for the import of fruit and vegetables into the European market. Fruit and vegetable importers in the Netherlands often not only serve the local market but also re-export to other European countries. The country's export-import ratio of about 50-60% per year also reflects this.

As the main entry point for fresh grapes into Europe, the Netherlands is the leading importer from developing countries – both in terms of volume and direct market share. In 2019-2023, Dutch imports of fresh table grapes from developing countries fluctuated between about 230,000 and 300,000 tonnes. This translated to a share of about 74-80%.

Leading suppliers are South Africa (30% in 2023), Peru (18%) and India (14%), followed by Chile and Egypt (at 8.1% each). Other suppliers from developing countries include Brazil (4.0%) and Namibia (3.1%).

Tips:

Use Dutch traders when you have difficulties in entering different European markets. Dutch importers often have wide experience in trading and are familiar with the different European preferences. Dutch fruit companies have a no-nonsense mentality, so calling or visiting them often works better than e-mailing.

See our study on [exporting fresh fruit and vegetables to the Netherlands](#) for more information on how to export fresh fruit and vegetables to the Netherlands specifically.

The United Kingdom: a mature table grape market

The United Kingdom is probably the most mature import market for table grapes in Europe. At the start of 2024, [red and green grapes were the 2nd and 3rd most popular fruits](#), enjoyed by 80-81% of British adults. Only strawberries are more loved. The market is saturated, and the best way to enter is by replacing other suppliers with better prices or new varieties, original packaging and other innovations (see [trends chapter](#)). The country's fresh grape imports steadily declined from 282 thousand tonnes in 2019 to 259 thousand tonnes in 2023, at a CAGR of -2.1%. Virtually all of these imports are destined for domestic consumption.

However, imports from developing countries performed relatively well. They grew from 155 thousand tonnes to 156 thousand tonnes, peaking at 169 thousand tonnes in 2021. This means their direct import market share grew from about 55% to 60%. This is well above the European average.

Brexit in 2020 caused some important changes in the supply structure to the country for table grapes. Most notably, Germany and the Netherlands lost their share in the British market – from 6% and 5% in 2019 respectively to almost zero in 2023).

South Africa continues to be the leading supplier, with an import market share of 22% in 2023. Spain followed with 21% and Egypt with 12%. Peru has become the 4th largest supplier, as its direct import market share grew from 6.0% to 9.9%. Other suppliers from developing countries include Chile (8.4%), India (5.9%), Brazil (5.8%) and Namibia (4.0%).

The British table grape market has become a price-fighting market, with discount retailers Lidl and Aldi taking an increasing share in promotions. Retailers also look for more sustainable packaging options (see trends chapter). For competitive suppliers, the UK remains an important market as it imports directly from diverse origins.

In 2023, the British consumer ate 3.8 kilos of grapes per person per year on average. You can find a wide variety of grapes on the market, but seedless grapes are the standard.

Tips:

Invest in product innovation to stand out on the British market, for example in special grape varieties or packaging options. For inspiration, see the product range of [Tesco](#) and [Waitrose](#), for example.

Read more about the characteristics of the British market in our study on [exporting fresh fruit and vegetables to the United Kingdom](#).

France: barely any imports from developing countries

A preference for local and in-season fruit makes France a smaller market for foreign grapes than Germany or the United Kingdom. Most fresh grapes are sourced in Europe. Imports grew from 117 thousand tonnes in 2019 to 126 thousand tonnes in 2023, at a CAGR of 2.0%. Imports from developing countries fell from 14 thousand tonnes to about 4 thousand tonnes, at a CAGR of -25%. As a result, their direct import market share dropped from about 12% to 3.5%. This confirms that opportunities are limited in this market.

France is one of the largest grape producers in Europe, but most of this production is destined for the wine industry. In table grapes, France is not very competitive. Growers lack a wider variation of commercial cultivars for export and their climate is not as ideal for table grapes as further south in Europe. In line with this, Italy (58% of total French imports in 2023) and Spain (18%) are France's leading fresh grape suppliers. Off-season (when European countries don't supply), France sources some grapes from Morocco, Peru, Chile, South Africa and Egypt.

Grapes are the 8th most popular fruit among the French, with 16% listing them as their favourite. Like in Germany, grape consumption peaks during the European season. Locally produced table grapes such as the black muscat and chasselas (both used for wine and fresh consumption) get higher prices in retail. But there is competition from other local fresh fruit such as peaches, apples and pears. These fruits have a higher production than fresh table grapes and are cheap to buy. This competition from local fruit and a dominant supply from European growers make it difficult to find opportunities during the European season.

Tips:

Explore which table grape varieties are commonly grown and sold in France. For example, look at the offer of supermarkets like [Carrefour](#). Discuss with potential buyers in France which varieties they think have potential – share samples if your variety is still unknown.

Check out the market prices (in French) on the [Market News Network of France Agrimer](#). Search for 'raisin' (grape).

Poland: offers opportunities for eastern suppliers

Surprisingly, Poland is among the largest importers of fresh grapes. Between 2019 and 2023, its imports were relatively stable at about 125 thousand tonnes. Imports from developing countries increased from 38 thousand tonnes to about 43 thousand tonnes, at a CAGR of 3.0%. As a result, their direct import market share grew from about 33% to 35%. This is an interesting development, although still below the European average.

Poland's leading suppliers of fresh grapes are Italy (38% in 2023) and Germany (13%), followed by Peru (8.0%). Because of its location, Poland offers opportunities for suppliers from the East. Together with Romania and Austria, Poland forms an eastern corridor for grapes from origins such as Moldova, Türkiye and North Macedonia. As a result, Moldova (7.6%) and Türkiye (6.8%) have become Poland's 4th and 5th largest fresh grape suppliers.

Other suppliers from developing countries include India (4.2%), South Africa (4.1%), Chile (3.7%) and Egypt (2.3%). Grapes from such origins are often also imported via the Netherlands or Germany. If your country is located far from Poland, traders in these countries can help to get your grapes onto the Polish market.

Tip:

Consider going to the [Bronisze wholesale market](#) where much of the Moldovan grapes are sold. This can be a good starting point to get contacts in the Polish grape market.

Spain: has potential to become a trade hub

Spain is the second-largest producer and net exporter of grapes after Italy. But recent years also show increasing imports. This provides new opportunities for suppliers of counter-seasonal grapes or nearby countries that can fill supply gaps early in the Spanish season. Although Spain traditionally consumes seeded grapes, [consumption of seedless varieties has grown exponentially in recent years](#).

Spanish imports of fresh grapes grew from 53 thousand tonnes in 2019 to 67 thousand tonnes in 2023, at a strong CAGR of 6.1%. This included a peak of 78 thousand tonnes in 2022. Imports from developing countries nearly doubled from 19 thousand tonnes to 35 thousand tonnes, at an impressive CAGR of 16%. As a result, their direct import market share grew from about 36% to 52%. This is above the European average, making Spain a promising market.

Opportunities are particularly good for Latin American countries, which supply most of Spain's fresh grapes. Leading suppliers are Peru (36% in 2023), Italy (24%) and Chile (18%). Brazil follows with 7.0%, and South Africa with 4.8%. Other suppliers from developing countries include Morocco (1.4%) and Egypt (1.0%). These increasing imports suggest that Spain could be positioning itself as a trade hub for counter-seasonal grapes in Europe.

Tips:

Find potential production and trade partners in Spain at [Fruit Attraction](#).

For more information, see our study on [Exporting fresh fruit and vegetables to Spain](#).

4. Which trends offer opportunities or pose threats in the European table grape market?

One important trend in the European table grape market is the growing interest in sustainability and healthy lifestyles. Convenience and new varieties also offer opportunities.

Sustainability has become mainstream

Sustainability has become mainstream in the fruit and vegetables sector. European buyers are increasingly interested in sustainable fruits and vegetables and want to have a transparent supply chain. Sustainability covers both social and environmental aspects.

Sustainable sourcing is an important trend in leading importing countries like Germany, the Netherlands, and the United Kingdom. As such, you will increasingly have to deal with sustainability requirements from European buyers.

For example, Dutch fresh produce importer [Eosta](#) has developed [Nature & More](#); a 'trace and tell' consumer trademark and online transparency system. Their products carry a unique QR or other code that provides online access to the producer and gives full transparency on ecological and social impact. Eosta assesses companies using the [Sustainability Flower](#), a framework to monitor and manage sustainability impacts for 7 key aspects: society, economy, climate, water, soil, biodiversity and individual well-being.

Figure 5: Nature & More grower ProNatur

Source: [Nature & More](#) @ YouTube

Tips:

Discuss with your (potential) buyer to determine which certification scheme, if any, can be relevant to your target market.

Use the trend for more sustainably-produced products to your advantage by making sustainability a priority in your company. In doing so, you can stand out from other suppliers.

Organic grapes

The increased interest in sustainability and healthy lifestyles also boosts demand for organic produce. The [organic retail sales value in the EU more than quadrupled between 2004 and 2022](#), with particularly strong growth from about 2014-2020. It peaked at €4.6 billion in 2021, before dropping by 3.4% in 2022. This likely reflects a decline in consumer demand due to the [cost-of-living crisis](#) and rising food prices. Germany is the largest market, followed by France. Per capita spending on organic products reached €104.30 per person - up to about €400 in Switzerland and Denmark.

Similarly, [EU imports of organic fruits \(including grapes\) dropped by 16.6% in 2022](#), from 143 thousand tonnes to 119 thousand tonnes. However, important players like producer [O.P. Ortofrutticoli Gruppo Tarulli](#) and wholesaler [Roy's Naturkost](#) have reported growing demand in 2024. This is promising for producers of organic-certified table grapes that want to export to Europe.

The Netherlands and Germany are the EU's leading importers of organic agri-food products, accounting for a combined 53% of the imported volume. France follows. As a key trade hub, the Netherlands re-exports a

significant part of these imports to other EU countries. Germany's organic imports declined in 2022 (-13.1%), while Dutch imports increased (+4.6%).

Many leading supermarkets in the top EU importing countries sell organic grapes, including [REWE](#) (Germany), [Albert Heijn](#) (the Netherlands), [Sainsbury's](#) (the United Kingdom), [Carrefour](#) (France) and [Frisco](#) (Poland, online).

Plastic-free packaging

Reducing plastic and making packaging more sustainable will be key for future table grape sales. The abundant use of packaging was already an issue for many retailers and conscious consumers, but now [EU restrictions on single-use plastics](#) are forcing companies to take action.

This contradicts the demand for convenience, but it will impact the packaging practices of all grape suppliers. Most grapes are currently sold in punnets or clamshell packages of for example 500g, but [smaller snack-sized packages](#) are also increasingly available. These smaller packages of for example 250g or 170g do not increase the total volume of grapes, but they do add to the plastic waste.

Clearly, there is a need for more sustainable packaging. You must be prepared for this change. Grape packers were already using more and more top-sealed punnets to reduce the plastics of lids (clamshells). Now companies have started to implement new sustainable packaging such as [biodegradable and compostable carry bags for grapes](#), [cardboard punnets](#) or paper bags (see Figure 6). For organic grapes, [sustainable packaging such as cardboard](#) is a real selling point.

Figure 6: Table grapes in paper-based packaging in a German mainstream supermarket



Source: [GloballyCool](#), February 2024

It is good to anticipate changes and be innovative with packaging solutions. But the developments in this field are not yet complete. It will be a challenge to evaluate and implement appropriate packaging options for your target market. Leading retailers and organic brands are probably the first to demand sustainable or plastic-free packaging, but you can expect structural changes throughout the whole table grape sector.

Tips:

Reduce your use of pesticides through natural or integrated pest management (IPM). Read more about IPM on the website of the [Food and Agriculture Organization \(FAO\)](#) and check for guidelines in your country.

Ask your buyers about the possibilities of supplying organic grapes. Buyers in this market often specialise in organic produce and follow strict guidelines. Read more about the [principles of organic agriculture](#) on the [IFOAM Organics International](#) website.

For more information about organic certification, see our study on the [Market entry for table grapes](#).

Offer different packaging options and anticipate developments in sustainable packaging and convenience products. Using attractive packaging will also help distinguish your product.

Read more in our study on [which trends offer opportunities in the European fresh fruit and vegetable market](#).

Healthy lifestyles stimulate interest in table grapes

European consumers are very health conscious. They are increasingly focusing on a healthier lifestyle, which includes improving their eating habits. According to Statista, [about 60% of EU consumers are actively trying to eat healthy](#). They are seeking to reduce their consumption of processed foods and artificial additives and preservatives. This can boost the interest in table grapes, which offer a healthy snacking alternative.

This could offer opportunities. In a 2024 survey across 5 European countries, [81% of Europeans would ideally like to consume more fruit and vegetables](#) – specifically 88% of Italians, 84% of French and Spanish consumers, 76% of Germans and 72% of Dutch consumers. Price is the main obstacle, as 43% of Europeans have reduced their consumption of fruit and vegetables in recent months due to inflation. Other barriers include a lack of practicality and insufficient quality. These tie in with the trends of convenience and new varieties.

Tip:

Study the EU [legislation on nutrition and health claims](#) to avoid making claims that are not allowed. Examples of claims that are not allowed are: implying that eating grapes will cure specific diseases, false claims about the health benefits of eating grapes or misleading statements like “table grapes are the healthiest fruit available”.

Convenience is key

The European consumer has an increasing preference for convenience. Table grapes fit in well with this trend, because they are easy to eat and ideal as a fresh snack. Seedless grapes are particularly convenient. As such, they are setting the new standard.

Seedless

Seedless grape varieties have become more dominant, and their market share is expected to grow further. The United Kingdom was at the forefront of this development, but now seedless grapes are preferred in most of northern Europe. Southern and Eastern European markets have a more traditional consumption, including local varieties. Taste and price are important drivers, but these markets will also follow the seedless trend in the coming years. Seeded grapes will not disappear from the market, but their demand will depend more on attractive pricing or distinction in taste.

Grape growers in Spain, and increasingly in Italy and Greece, have started a transition towards seedless grape production to meet the growing demand. In counter-seasonal regions such as Peru, Chile and South Africa, many growers are also shifting to more seedless varieties. For example, until a few years ago Peru primarily produced Red Globe grapes. Now, many producers such as [Ecosac](#) and [Pedregal](#) are also producing seedless varieties like Crimson, Flame, Timson, Magenta or Sugraone and continue to find new and improved varieties.

Taste

Because grapes are often consumed as a snack and as a product of indulgence, consumer experience is an important success factor. Especially when dealing with experienced buyers, who appreciate premium quality, you can distinguish yourself with superior quality and taste. For example, there is a growing niche for highly aromatic varieties such as the Sable Seedless or Cotton Candy. Specific preferences can differ per region and buyer. Most importantly, besides being seedless, your grapes must be fresh, sweet and crisp.

Competition and increasing costs drive variety renewal

Competition and production costs in the grape industry are on the rise. The increasing costs of inputs, logistics and labour have affected grape suppliers globally. Producers today look for varieties with not only the best taste, but also the highest yield at minimum inputs.

There is a constant renewal of varieties. Increasing costs may push growers towards the most efficient grape varieties, but industry stakeholders agree that quality must be protected. This is not always easy. As a main category for European retailers, grapes must remain affordable.

Companies such as the South African [EXSA](#) work with [International Fruit Genetics](#) (IFG) to evaluate and introduce new grape cultivars that offer the best combination of quality, taste and growing properties. A [partnership between Cornell AgriTech and Sun World International](#) recently led to the release of two new, early-ripening varieties that have powdery-mildew resistance and cold-hardiness.

As a supplier, you have to decide on the best strategy for your company. One thing is certain: you must focus on innovation to cope with rising costs and strong competition.

Tips:

Work together with grape breeding companies and get information about new varieties from breeders such as [International Fruit Genetics](#) (IFG) and [Sun World International](#). Select the varieties that best suit your client's market.

Visit your export market regularly to update your market knowledge.

[GloballyCool](#) carried out this study in partnership with [ICI Business](#) on behalf of CBI.

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