

LEBTRADE PORTAL

A GOLDMINE FOR EXPORTERS

Fresh Grapes HS Code: 080610



Creating Export Opportunities by
MINISTRY OF ECONOMY & TRADE

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1. INTRODUCTION - WHICH MARKETS OFFER MOST OPPORTUNITIES FOR TABLE GRAPES FROM LEBANON?

Lebanese table grapes have a strong reputation for quality, flavour and taste, which gives you a valuable advantage in export markets. In 2024, Lebanon exported USD 28.5 million worth of table grapes, or 10,666 tons. The 30% growth in export value in 2024 is a positive sign and shows that there is still room for Lebanese exporters to expand and reach new promising markets.

Interestingly, Lebanon has a great opportunity to increase its market share in Europe and the GCC. This report provides an overview of Lebanon's current production and exports of table grapes, its position in the international markets, and the available opportunities to enhance the country's export potential with an overall aim of strengthening Lebanese exporters' capacities and competitiveness.

2. PRODUCT DEFINITION

Table grapes are grapes intended for consumption while fresh, as opposed to grapes grown for wine production, juice production, or for drying into raisins. *Vitis vinifera* table grapes can be in the form of either seeded or non-seeded varieties and range widely in terms of colour, size, sweetness and adaptability to local growing conditions.

Common commercially available table grape varieties such as Thompson Seedless and Flame Seedless are favoured by growers for their high yield and relative resistance to damage during shipment. Other less common varieties such as Cotton Candy, Kyoho or Pione are custom hybrids bred for size, appearance and specific flavour characteristics.

Delving into the Lebanese market, main table grapes varieties include Baytamouni, Tfeifihi, Maghdushi, Jbaai, Globe seedless, Early Superior seedless, Black Pearl, Red Globe. The most important areas of production are the Bekaa and Akkar where cultivation is facilitated by the local climate, including a long period of sunny days over the year, fertile soil and adequate averages of rainfall, which ensure the appropriate Brix degree. According to the Ministry of Agriculture, seasonal availability extends from June to February.

3. WHERE DO LEBANESE TABLE GRAPES CURRENTLY GO TO?

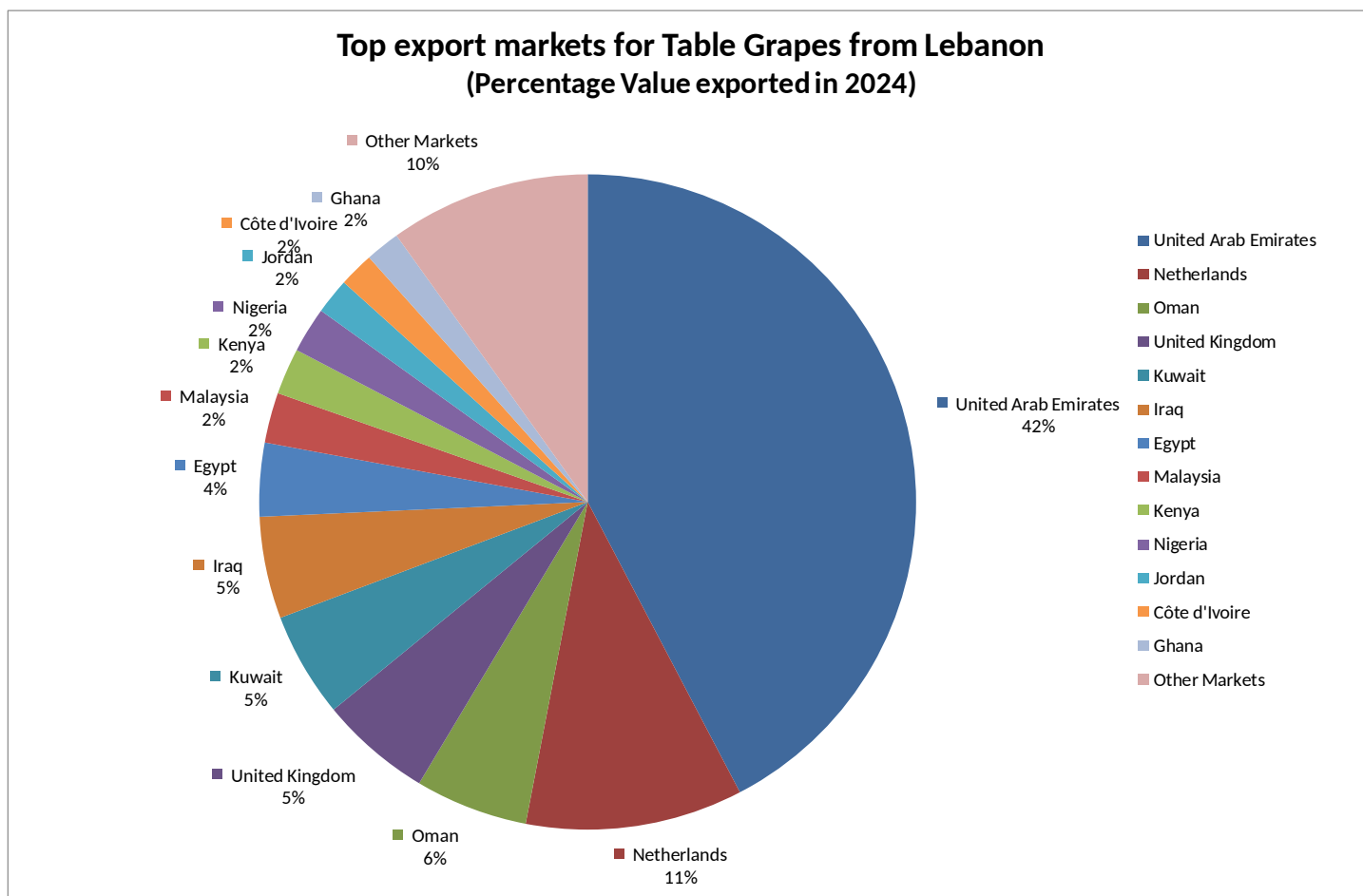


Figure 1. Top export markets for Table Grapes from Lebanon in 2024 - Source: ITC Trade map

Figure 1 shows that Lebanese table grape exports are still mainly concentrated in regional markets, with the United Arab Emirates clearly standing out as the leading destination. Other important markets include the Netherlands, Oman, the United Kingdom, Kuwait, Iraq and Egypt. For you as a Lebanese exporter, this is encouraging: it confirms that Lebanese grapes continue to perform well in nearby markets, while also gaining ground in selected international destinations.

What is especially positive is that Europe is no longer limited to just small-scale entry. With the Netherlands and the United Kingdom ranking among Lebanon's top destinations, there are clear signs that European markets can offer further growth opportunities. In other words, you can continue building on your strengths in regional markets while also looking ahead to expand into new, higher-potential export destinations.

4. WHAT IS LEBANON'S POSITION IN THE INTERNATIONAL MARKET?

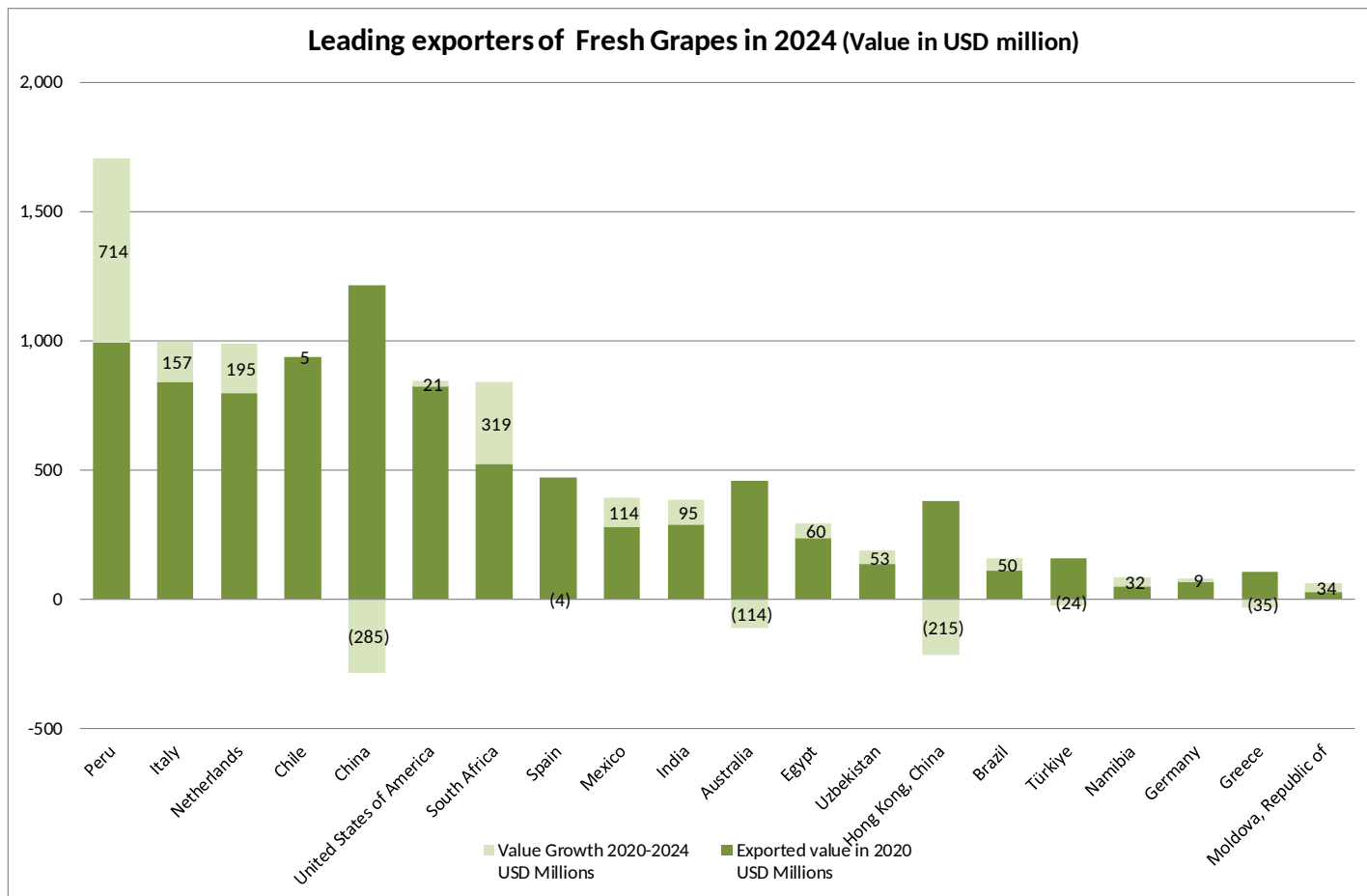


Figure 2. Leading Exporters for Table Grapes 2024 - Source: ITC Trade map

Largest Table Grapes Producers

As shown in Figure 2, the leading global exporters of fresh grapes in 2024 were Peru (USD 1,705.2 million), Italy (USD 996.6 million), the Netherlands (USD 989.2 million), Chile (USD 938.1 million), China (USD 927.8 million) and the United States (USD 843.7 million). While the Netherlands ranks among the top exporters in value terms, it should be viewed primarily as a major European trade hub and re-exporter, rather than only as a producing origin. Lebanon exported USD 28.5 million in 2024, accounting for around 0.3% of world exports and ranking 26th worldwide among exporters of fresh grapes. Excluding major trade hubs, Lebanon's position improves slightly, to around 25th place.

Largest Table Grapes Producers in the Mediterranean region

Among Mediterranean countries, Italy stands out as the leading exporter of fresh grapes in 2024, with exports valued at USD 996.6 million, followed by Spain (USD 467.2 million), Egypt (USD 293.1 million) and Türkiye (USD 133.6 million). By comparison, Lebanon exported USD 28.5 million. While Lebanon remains a relatively small exporter compared with these regional leaders, its presence in export markets shows that there is still room to strengthen its position further.

Table 1. Overview of Table Grapes harvest windows in the world's leading production countries

Country	J	F	M	A	M	J	J	A	S	O	N	D
Peru												
S. Africa												
Egypt												

Turkiye												
Chile												
India												
Lebanon												

Table 2. List of supplying markets for a product imported by the most potential European markets in 2024

Exporters	Import value 2024-M01	Import value 2024-M02	Import value 2024-M03	Import value 2024-M04	Import value 2024-M05	Import value 2024-M06	Import value 2024-M07	Import value 2024-M08	Import value 2024-M09	Import value 2024-M10	Import value 2024-M11	Import value 2024-M12
Importer: Netherlands												
World	99,218	178,961	200,510	129,699	111,808	84,741	26,073	18,650	25,659	50,169	104,321	156,590
S. Africa	50,879	143,688	117,280	30,320	3,083	0	0	0	0	0	724	39,304
India	129	9,111	60,019	66,128	38,122	1,049	17	0	0	0	0	0
Egypt	0	46	0	0	13,693	68,121	12,070	136	0	0	0	0
Importer: Germany												
World	78,600	74,876	81,799	75,467	60,838	56,050	70,298	87,620	125,861	120,213	80,205	72,557
S. Africa	38,799	48,100	48,005	27,002	8,201	905	51	9	478	408	731	12,371
India	4	1,855	14,211	29,397	26,573	5,482	186	10	83	35	0	0
Egypt	91	26	54	24	4,665	31,057	18,375	846	102	3	7	6
Importer: France												
World	13,114	9,682	10,692	9,760	9,762	14,414	25,759	34,018	59,923	63,099	38,227	22,145
S. Africa	1,673	3,320	4,618	3,631	1,631	348	73	18	10	22	273	953
India	0	159	1,101	1329	1,559	909	0	0	0	0	0	13
Egypt	0	0	1	2	68	38	566	8	92	2	1	0
Importer: United Kingdom												
World	58,658	71,902	74,019	58,563	46,246	58,375	44,707	60,102	69,088	81,805	70,209	76,312
S. Africa	24,726	59,738	59,044	21,779	489	623	102	21	309	0	1,118	12,664
India	4	109	5,820	14,941	13,767	128	52	0	0	0	0	36
Egypt	57,220	70,998	73,511	0	7,956	49,241	19,577	1,404	0	0	0	0

In table 1, the darker blue means it is a peak harvest month, whereas the clearer blue shows a slower harvest time.

As shown in Table 1, Lebanon's table grape harvest season extends from June to February, allowing Lebanese exporters to remain present in the market during the winter months, when some nearby competitors are less active. This creates a potential export window especially in December, January and February. However, this window is not free of competition. South Africa is a major supplier to several European markets during this period, with particularly strong exports in January and February. Other off-season suppliers, including Peru and Chile, are also present in international markets during the northern hemisphere winter.

A closer look at Table 2 shows that some European markets appear more promising than others during Lebanon's winter supply window. The Netherlands stands out mainly in December, and to a lesser extent in January, when supplies from India are very low or absent and imports from Egypt are negligible, although competition from South Africa remains strong. Germany also appears attractive in December and, to a lesser extent, January, when imports remain sizeable and supplies from India and Egypt are limited. Competition becomes much stronger in February as South African shipments rise. The United Kingdom offers its clearest opening in December, when Egyptian supply is absent and Indian volumes are minimal, while competition intensifies in January and February due to high shipments from both

Egypt and South Africa. France appears to offer a smaller, more niche opportunity in December to February, when supplies from India and Egypt are almost non-existent, although the overall market size is more limited.

For Lebanese exporters, this means that the best opportunity in Europe is not broad-based across all markets and months, but rather depends on targeting the right markets at the right time. In practical terms, December appears to be the strongest entry point, especially for the Netherlands, Germany and the United Kingdom, while France may offer smaller niche opportunities through December to February.

5. WHAT ARE THE LATEST TRENDS IN TRADE?

5.1 WHAT ARE THE TRENDS IN THE 20 LARGEST IMPORTING COUNTRIES?

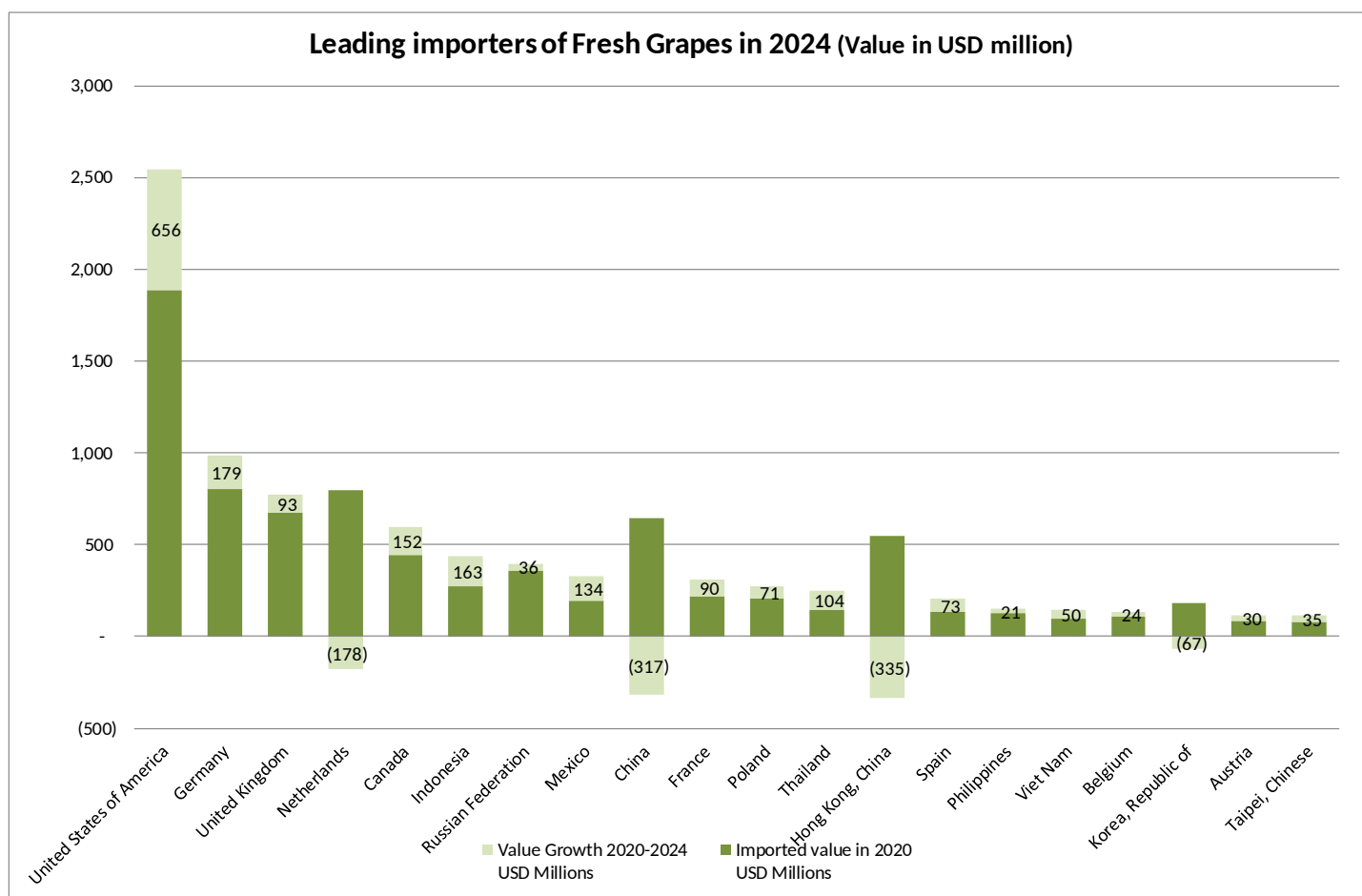


Figure 3. Leading importers for Table Grapes in 2024 - Source: ITC Trade map

The global fresh grape market remains large and attractive. In 2024, world imports reached USD 11.4 billion, with the United States remaining by far the largest importer at USD 2.54 billion, followed by Germany (USD 984.4 million), the United Kingdom (USD 769.7 million), the Netherlands (USD 621.5 million) and Canada (USD 597.2 million). For Lebanese exporters, this shows that demand is concentrated in a limited number of large markets, especially in North America and Europe. The Netherlands is also important to watch, not only as a destination market, but as a major trade hub and re-export platform for Europe.

Europe remains particularly relevant for Lebanese exporters. In 2024, the main European importers included Germany, the United Kingdom, the Netherlands, France, Poland and Spain. This means that Europe continues to offer strong market potential, but not all markets are moving in the same direction. Some importers have shown good growth in recent years, such as Spain, France and Germany, while others, such as the Netherlands, have recorded a decline in

import value over 2020–2024. For Lebanese exporters, this means that market selection matters: some destinations are expanding, while others remain important mainly because of their trading role.

In Asia, import demand is also significant, especially in Indonesia, China, Thailand, the Philippines and Viet Nam. Several of these markets recorded solid import growth between 2020 and 2024, showing that demand is not limited to Europe and North America. For Lebanese exporters, these markets may represent longer-term diversification opportunities, although they are generally more distant and may involve more complex market access conditions.

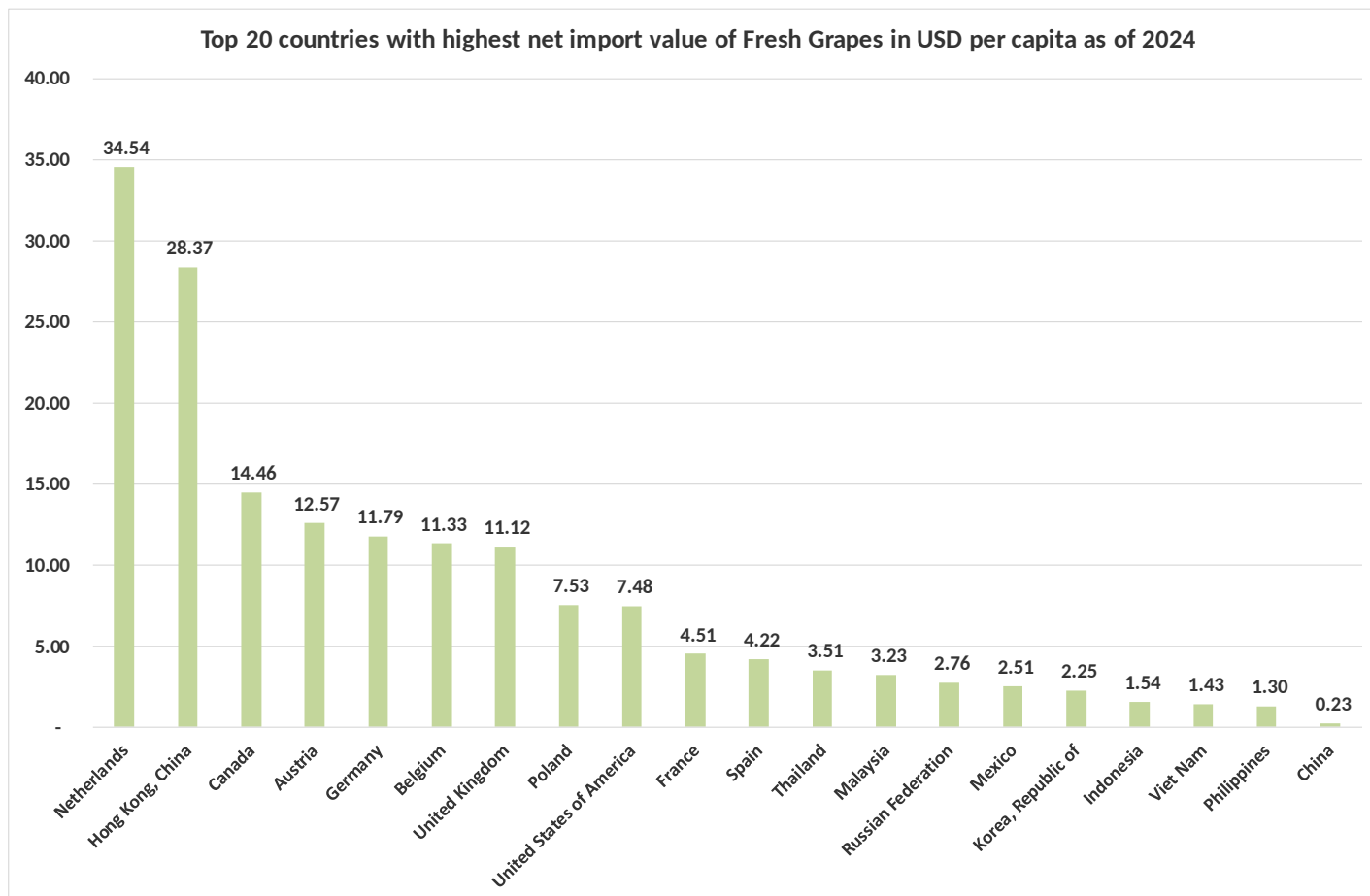


Figure 4. Top 20 countries with highest net import value of Table Grapes in USD per capita in 2024 - Source: ITC Trade map

Interestingly, the per capita import statistics of 2024 (as shown in Fig. 4); show that the Netherlands, China and Canada topped in Table Grapes consumption. It also shows that there is still a huge potential for growth in countries with lower per capita like Austria, Germany, Belgium and UK.

5.2 WHAT ARE THE TRENDS IN TRADE IN THE MIDDLE EASTERN MARKET?

For Lebanese exporters, the GCC remains highly relevant because it combines geographic proximity with year-round demand. In 2024, the largest GCC importers of fresh grapes were the United Arab Emirates (USD 86.3 million) and Saudi Arabia (USD 78.6 million), followed by Oman (USD 20.4 million), Kuwait (USD 17.9 million), Qatar (USD 13.5 million) and Bahrain (USD 7.3 million). This confirms that the GCC is still an important regional outlet for grape exports.

That said, recent trends show a mixed picture. Between 2020 and 2024, imports grew moderately in several GCC markets, including the UAE, Qatar, Bahrain, Oman and Kuwait. However, between 2023 and 2024, imports fell in Saudi Arabia, the UAE and Qatar, while growth remained modest in Oman and Kuwait. For Lebanese exporters, this means

that GCC markets are still important, but they cannot be treated as guaranteed growth markets. They require closer market monitoring and stronger positioning.

A simple takeaway for Lebanese exporters is this: large markets such as the United States and Europe show where global demand is concentrated, while the GCC remains a natural nearby market for Lebanon. The best opportunities are likely to come from combining a strong presence in traditional regional markets with selective expansion into larger, high-potential import markets.

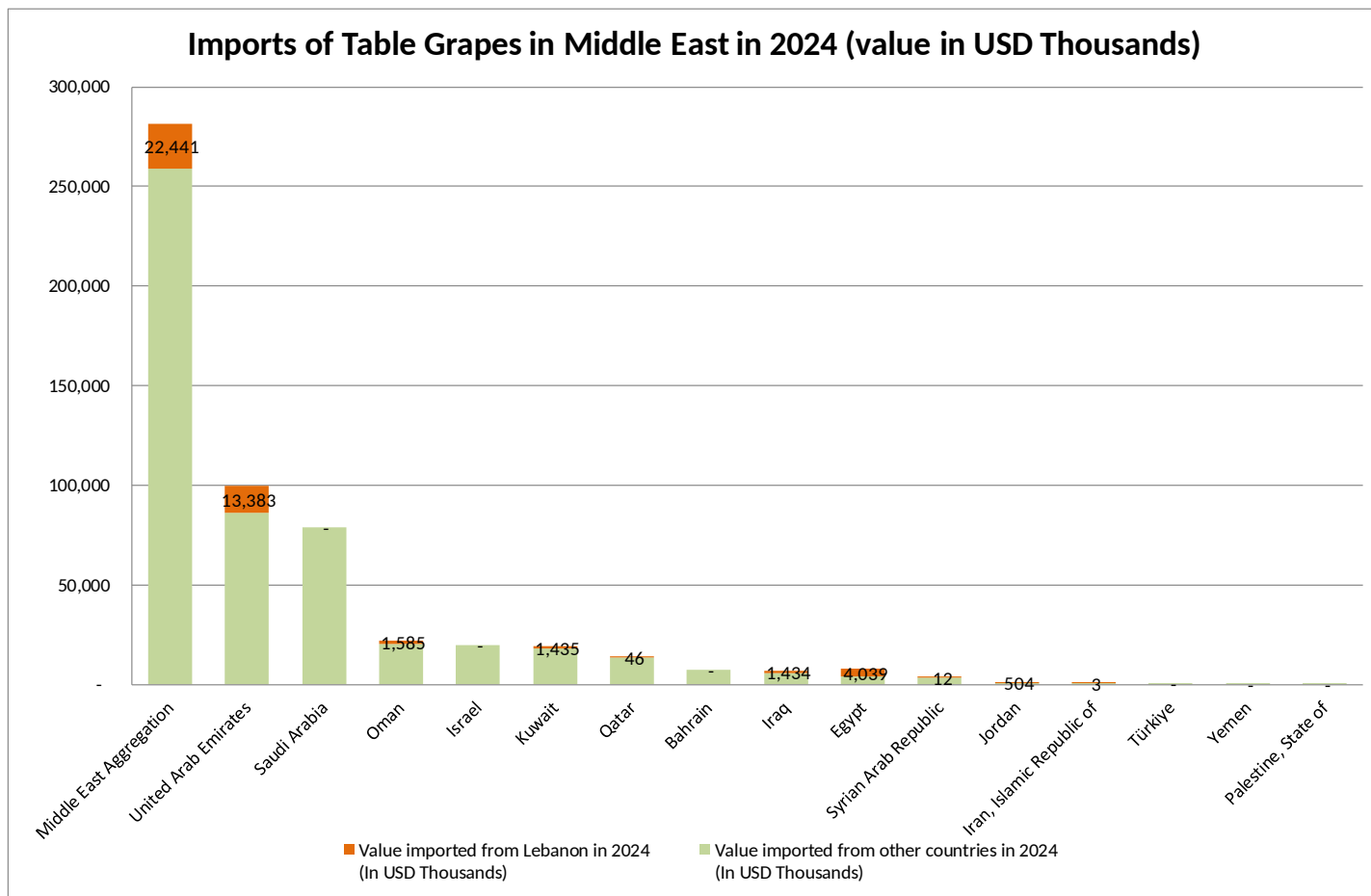


Figure 5. Imports of Table Grapes in Middle East in 2024 - Source: ITC Trade map

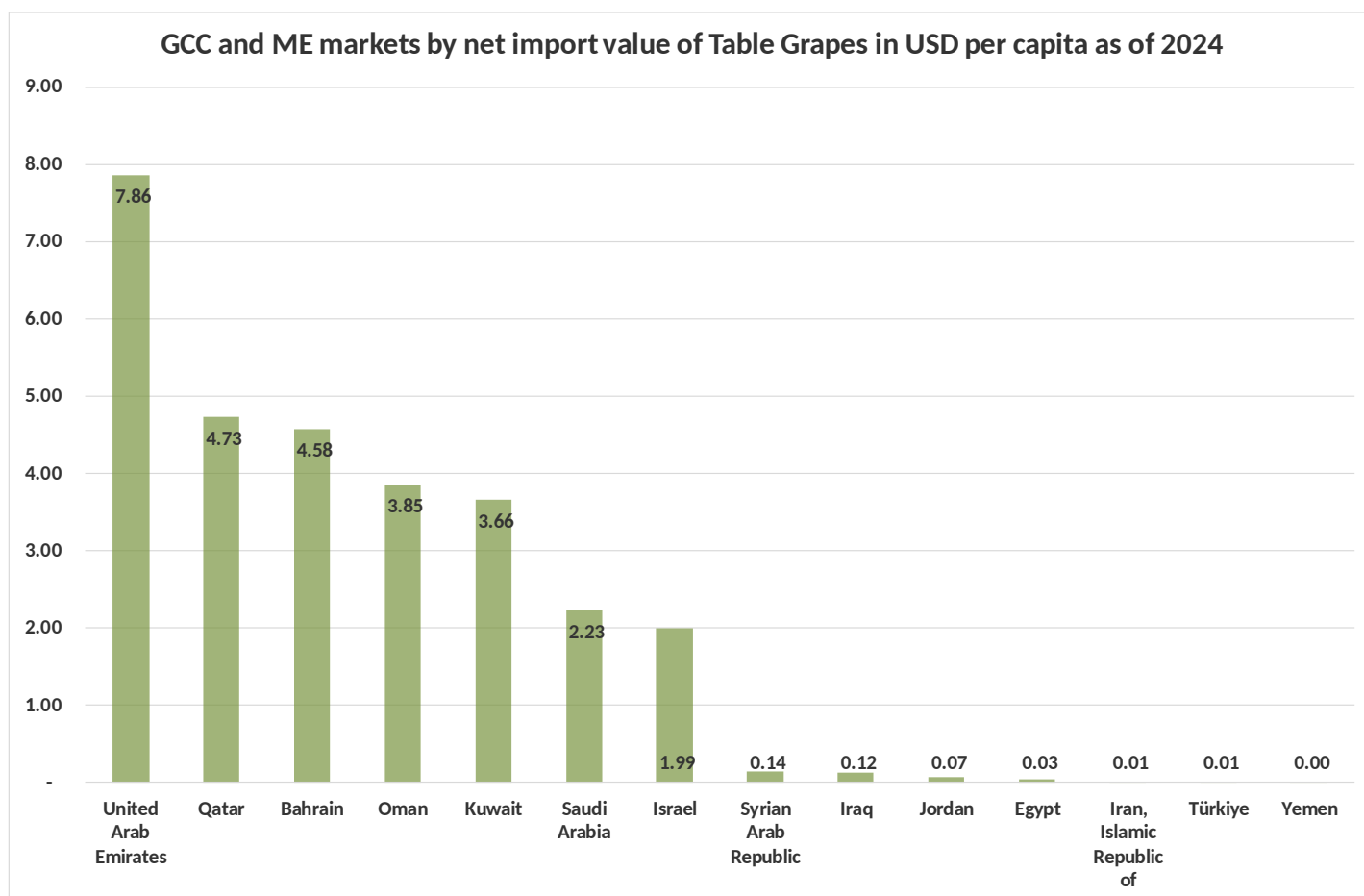


Figure 6. GCC and ME imports of Table Grapes in USD per capita as of 2024 - Source: ITC Trade map

6. WHAT ARE INTERESTING MARKETS FOR THE FUTURE?

Some markets stand out more than others when looking at market size, imported volume, recent growth, supplier distance, supplier concentration, and demand per person. For Lebanese exporters, the most interesting markets are Germany, the United Kingdom, the Netherlands, the Russian Federation, Malaysia, the United Arab Emirates, and Saudi Arabia.

In Europe, Germany and the United Kingdom stand out as the strongest destination markets because of their large import value, while the Netherlands is especially important as a gateway into Europe rather than only a final market. CBI also highlights these three markets as the main European opportunities for table grapes, with the Netherlands playing a major hub role and Germany and the UK offering large-volume demand.

CBI also shows why Europe remains attractive: demand is stable, imports are needed year-round, and developing-country suppliers are gaining ground. It also points out that seedless grapes, reliable supply, low pesticide residues, and more sustainable packaging matter more and more, especially in Germany and the UK.

Outside Europe, the Russian Federation stands out as a large-volume market, Malaysia as a smaller but growing Asian market, and the UAE and Saudi Arabia as important nearby regional markets. Together, these seven markets offer a good mix of large consumer markets, hub markets, and regional priority markets.

Table 3 below compares these seven markets using the main factors that matter most for Lebanese exporters, including import value, imported volume, growth, supplier distance, supplier concentration, and import value per capita.

Table 3. Top potential markets for Lebanese Table Grapes

Market	Import value 2024 (USD Million)	Imported volume 2024 (Tons)	Annual growth 2020 -2024 (%)	Avg. distance of suppliers (km) ¹	Concentration of suppliers ²	Import value per capita (USD/person) ³	Tariffs (%)
Germany	984.4	325,510	6%	4,413	0.16	11.79	3.8%
United Kingdom	769.7	273,616	2%	6,276	0.14	11.12	3.8%
Netherlands	621.5	254,757	-7%	7,202	0.15	34.54	3.8%
Russian Federation	396.5	353,853	4%	3,443	0.2	2.76	3.8%
Malaysia	114.8	52,315	7%	5,637	0.29	3.23	5.0%
UAE	86.3	72,670	7%	4,041	0.23	7.94	0%
Saudi Arabia	78.6	64,100	1%	5,048	0.2	2.23	0%

The average distance of supplier's measures how far an importing country sources its Table Grapes. Higher values indicate that imports originate from more distant countries, while lower values suggest that imports are sourced mainly from neighboring countries.

² The concentration of suppliers is an index ranging between 0 and 1. Values closer to 0 indicate a diversified supplier base, with imports sourced from multiple countries, while values closer to 1 indicate a high concentration, meaning imports are sourced from a small number of countries (typically two or three).

³ The ratio of imports of Table Grapes in USD value and the population of each country.

7. INTERPRETATION AND TIPS

- Given the fierce competition from European suppliers, good quality, adequate packaging in punnets as needed for supermarkets and compliance with various certifications, are preconditions for market entry of Lebanese grapes to the European market.
- Use Lebanon's winter window wisely. Lebanon can supply grapes from June to February, with December offering a strong entry point into Europe, especially the Netherlands, Germany, and the UK.
- Treat the Netherlands as a gateway. Exporting to the Netherlands can help Lebanese exporters access wider European markets through its strong re-export network.
- Compete on quality, not volume. Since Lebanon is smaller than major exporters, it is better to stand out through flavour, quality, timing, and niche markets.