



# 11<sup>th</sup> International Table Grape Symposium

Murcia, Spain.

28<sup>th</sup> September to 2<sup>nd</sup> of October 2026

<https://11itgs.es/>



fruit  
attraction

06 - 08 OCT 2026

THE  
**ART**  
OF  
PRODUCING  
 **GRAPES**

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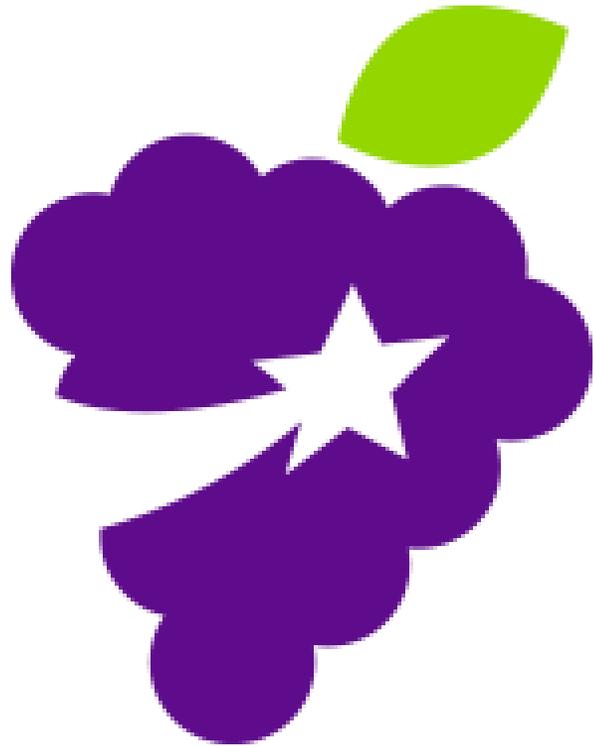
**11 ITGS**

Int. Table Grape Symposium

[www.11itgs.es](http://www.11itgs.es)



**Mis Aguardamientos personales a mis colegas  
y amigos miembros de UVANOVA <https://www.uvanova.cl/>**



**UVANOVA**

**COMISIÓN DE INVESTIGACIÓN PARA EL DESARROLLO  
DE UVA DE MESA.**



***Next 12<sup>th</sup> International  
Table Grape Symposium in  
2030 should be in Sonora,  
Mexico, start to be ready  
Now!***



# AgroFresh

## “Comercio Mundial de Uva de Mesa drivers, futuro y una realidad técnica. Una Mirada Hacia Adelante Febrero 2026”

Oscar Salgado M.

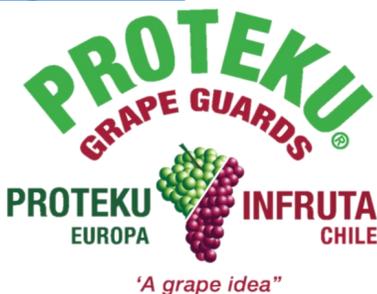
Hermosillo

[oscar.salgado@agrofresh.com](mailto:oscar.salgado@agrofresh.com) / [cocosalgado@gmail.com](mailto:cocosalgado@gmail.com)

*Febrero 2026*

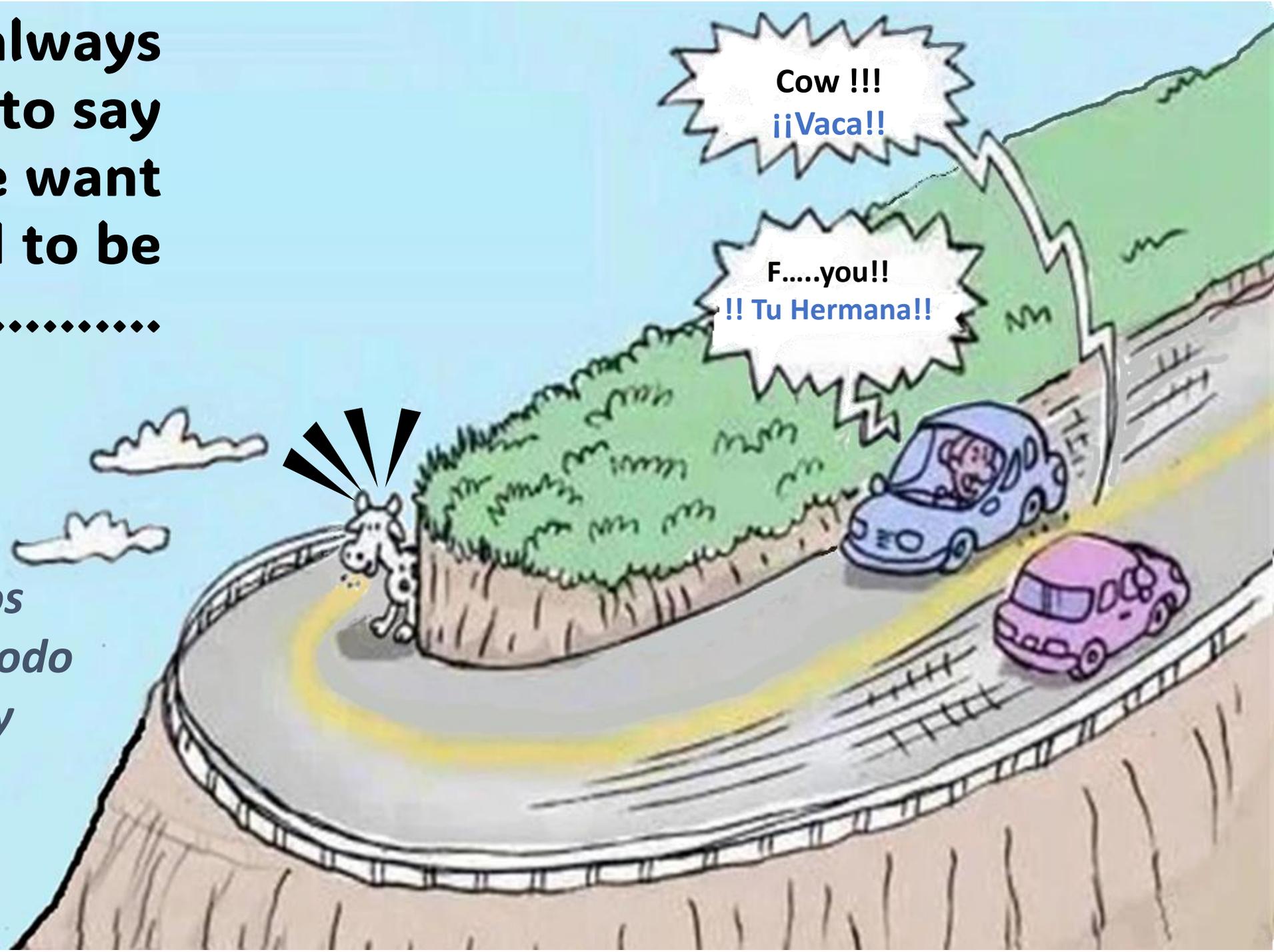


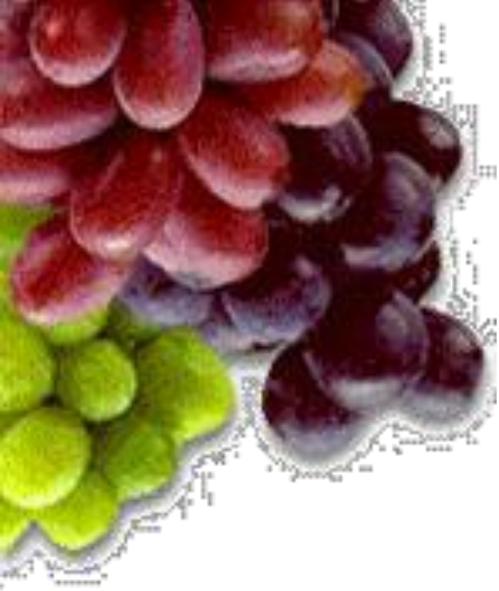
**UVASYS**



**We don't always  
have time to say  
everything we want  
to ... and to be  
understood.....**

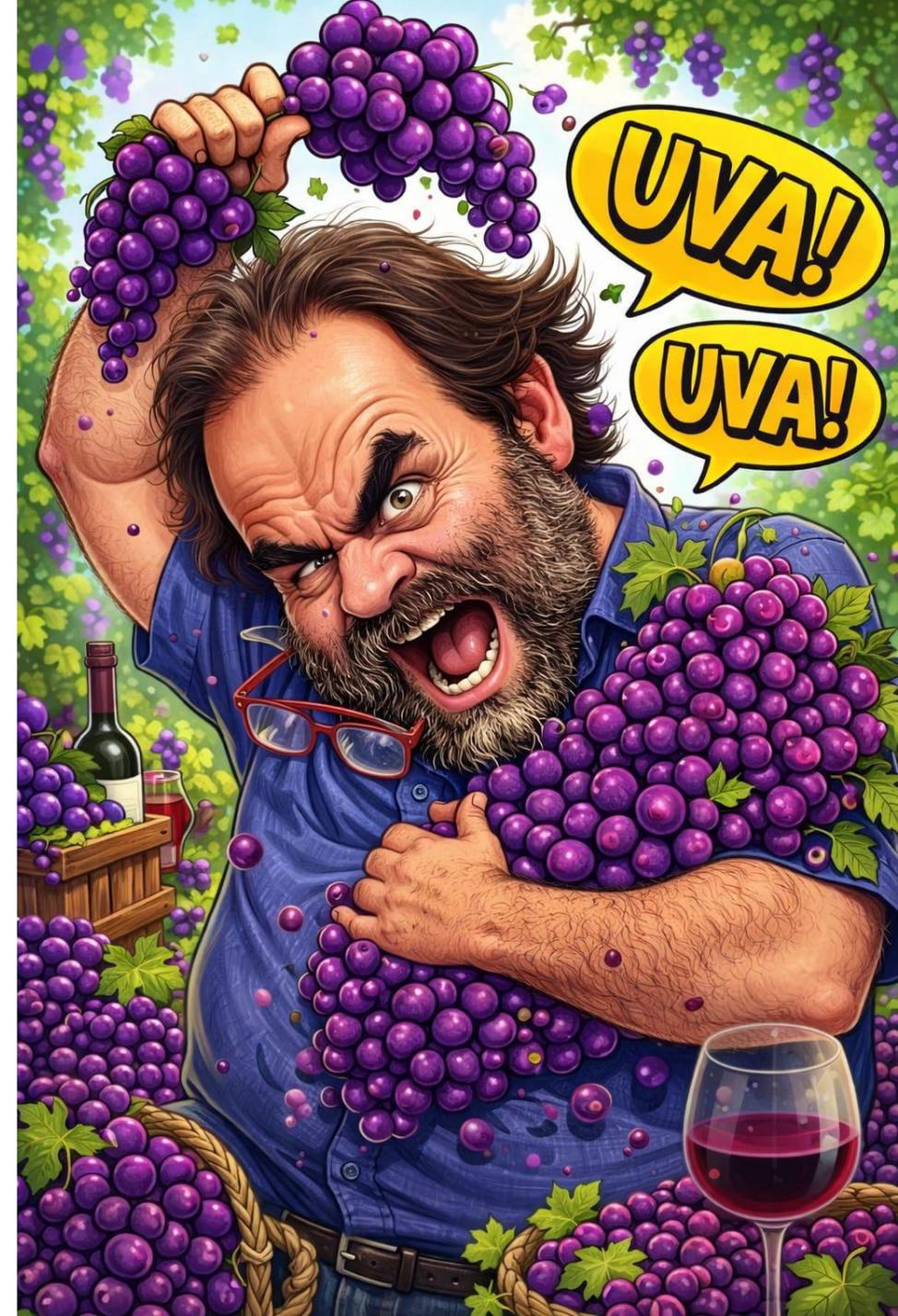
*No siempre tenemos  
tiempo para decir todo  
lo que queremos....y  
para ser  
comprendidos.....*





**“No tienes que estar de acuerdo  
conmigo en todo, pero entonces  
tampoco tienes que estar de  
acuerdo contigo mismo”**

*O. Salgado 2024*







# Talent

What made “*Usain Lightning Bolt*” the best sprinter in history?

**Genetic**  
**Genética**

**Training with  
Discipline**  
**Entrenamiento  
con Diciplina**

**Mental state  
and mental  
work**  
**Estado Mental  
y el trabajo de  
este**

**Food or  
Diet  
(Nutrition)**

**Expression of his Maximum  
Genetic Potential**  
**Máxima expresión del  
potencial Genético**



Las opiniones y declaraciones contenidas en esta presentación son emitidas a título estrictamente personal. No reflejan ni comprometen, en forma alguna, a las empresas en las que presto servicios, siendo íntegramente de mi exclusiva responsabilidad.

Oscar Coco Salgado



**Nunca el mundo había estado tan expuesto a la agenda tan particular de un presidente de los Estados Unidos de América. Hoy lo estamos, y mucho más de lo que potencialmente nos gustaría o pensábamos. Ya sea de forma directa o indirecta, dependeremos —en mayor o menor medida— de este nuevo orden geopolítico, Si aceptamos que puede llamarse "nuevo orden" a esto que algunos podrían denominar "**Ego-política**".**

Esto representa, en particular, una lección no solo para la Unión Europea: la necesidad de trazar un camino propio, dejando atrás el buenismo y sustituyendo la hiper -regulación por **innovación**.

Ahora bien, no estamos aquí para juzgar si esto es bueno o malo; simplemente, **debemos mantenernos alerta y los factores productivos que podamos controlar, debemos entonces tenerlos controlados.**



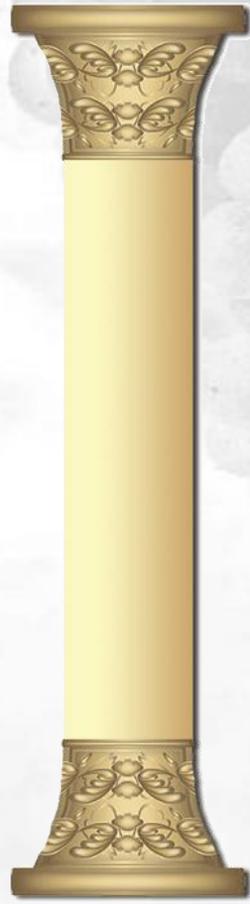
# Table Grape Revolution

Tropical and subtropical  
Table grape production

Embryo rescue  
Genetics  
**(Gen Editing)**

Middle class

Improvement in  
production  
techniques



Improvement Pre  
and Post Harvest  
Technology

## Key Drivers





# Active Inertia

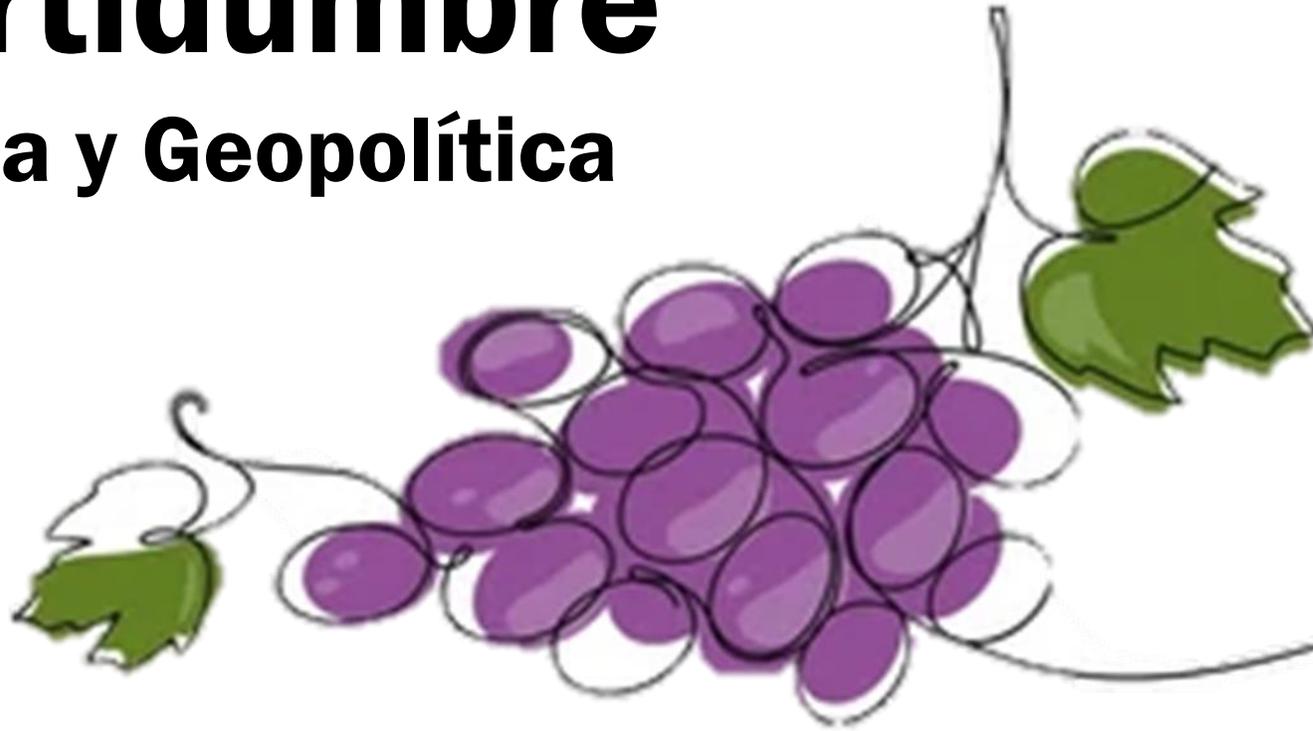
Donald Sull 1999





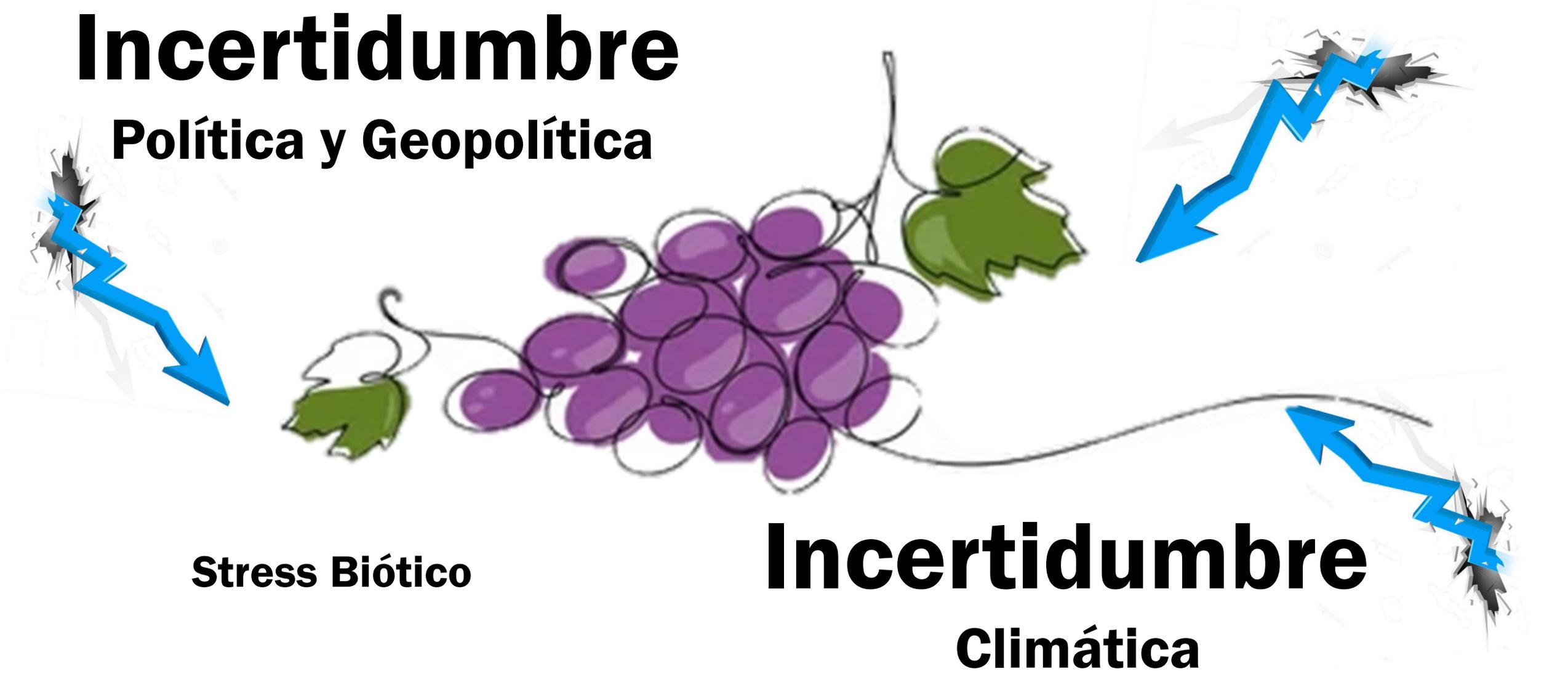
# Incertidumbre Política y Geopolítica

Stress Abiótico



Stress Biótico

# Incertidumbre Climática





Autumn Crisp UK season 2022 origin Spain



## Abiotic Stress

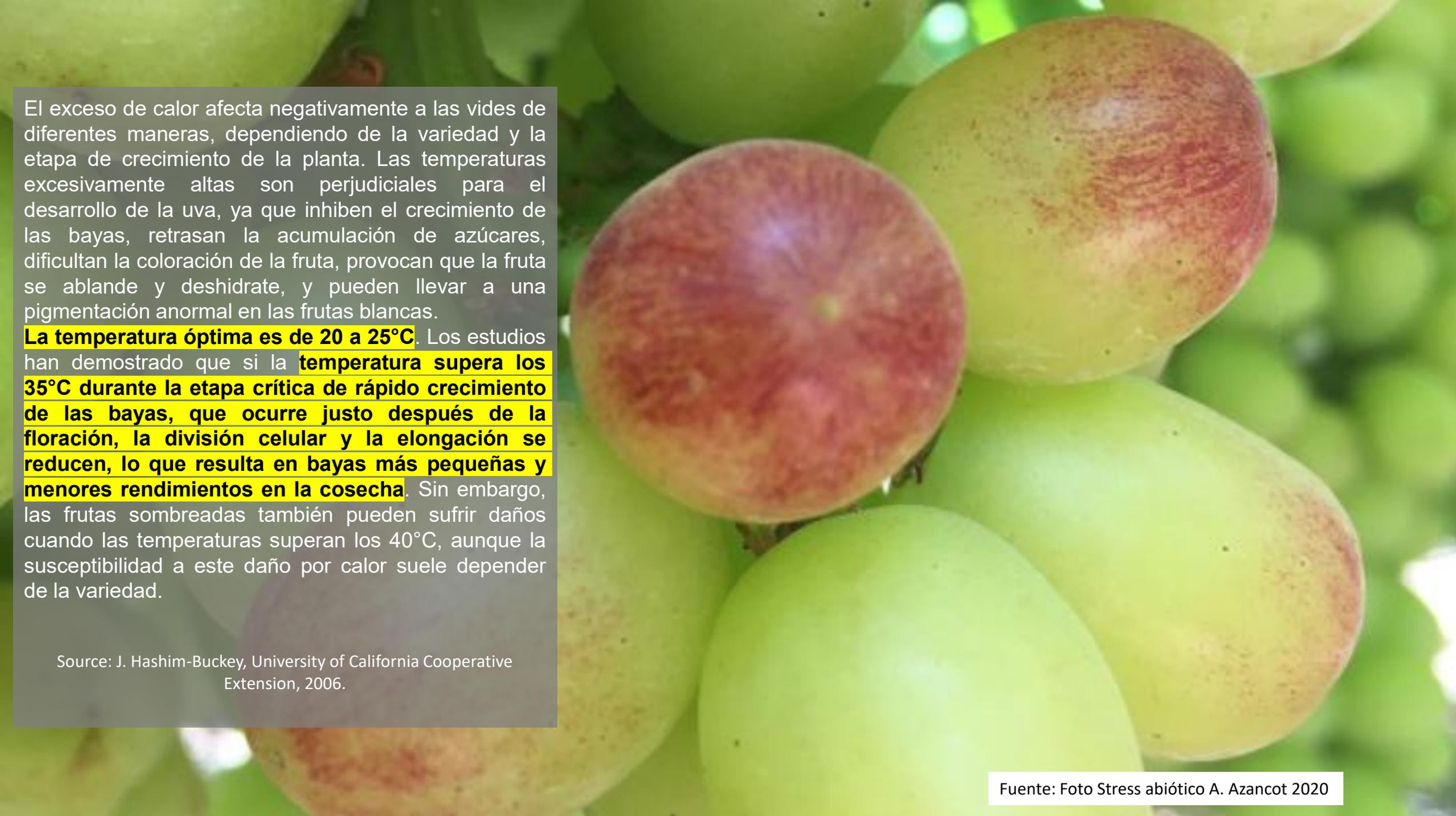
US – CA, Autumn King almost imperceptible seed trace  
November 2015, Wholesale Market of Mumbai , India

Fidelibus

(<https://www.growingproduce.com>

2022) It is a phenomenon associated with high temperatures during flowering and fruit set and the management of growth regulators.

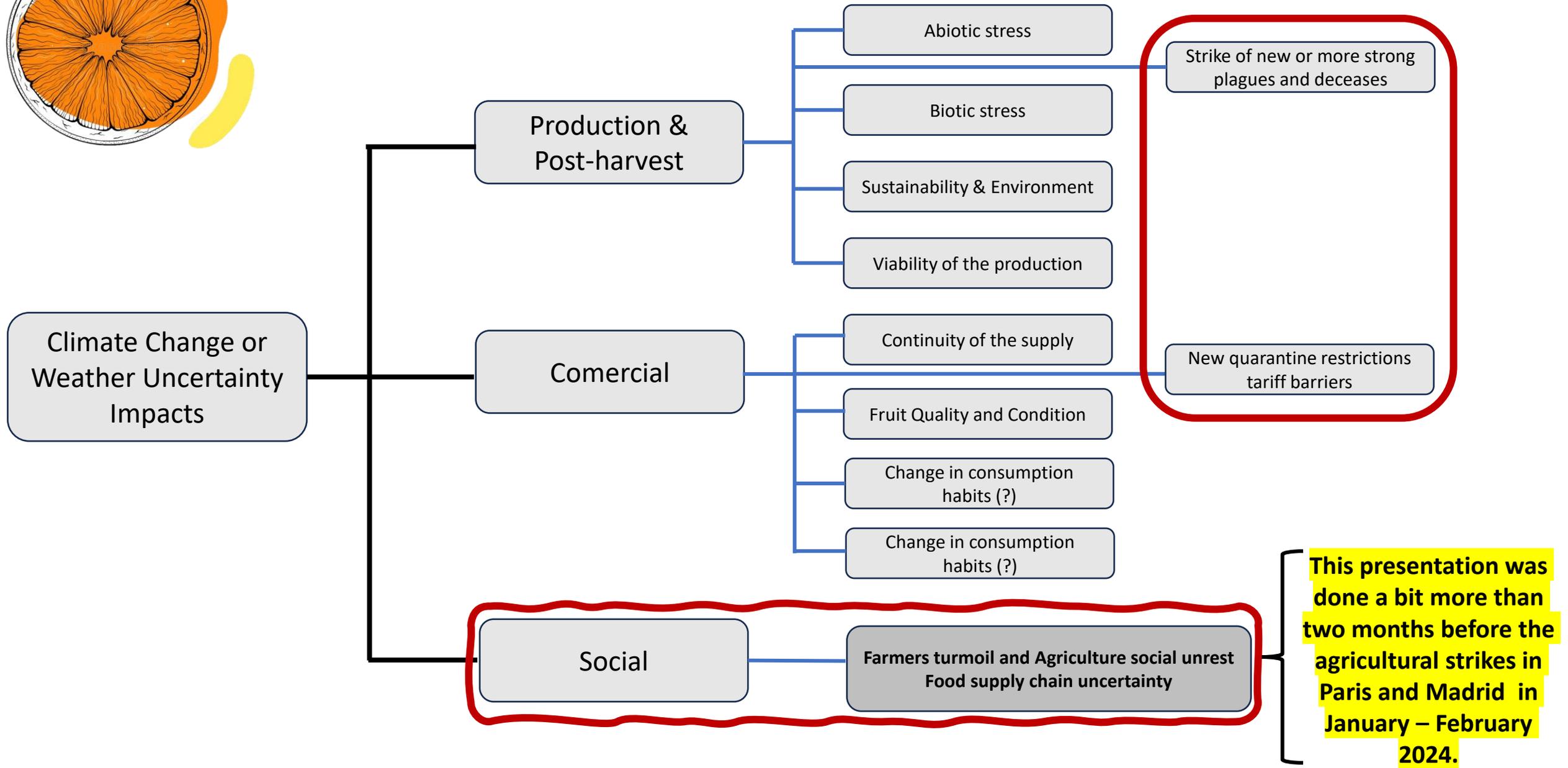
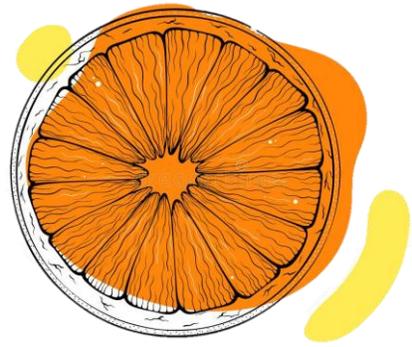




El exceso de calor afecta negativamente a las vides de diferentes maneras, dependiendo de la variedad y la etapa de crecimiento de la planta. Las temperaturas excesivamente altas son perjudiciales para el desarrollo de la uva, ya que inhiben el crecimiento de las bayas, retrasan la acumulación de azúcares, dificultan la coloración de la fruta, provocan que la fruta se ablande y deshidrate, y pueden llevar a una pigmentación anormal en las frutas blancas.

**La temperatura óptima es de 20 a 25°C.** Los estudios han demostrado que si la **temperatura supera los 35°C durante la etapa crítica de rápido crecimiento de las bayas, que ocurre justo después de la floración, la división celular y la elongación se reducen, lo que resulta en bayas más pequeñas y menores rendimientos en la cosecha.** Sin embargo, las frutas sombreadas también pueden sufrir daños cuando las temperaturas superan los 40°C, aunque la susceptibilidad a este daño por calor suele depender de la variedad.

Source: J. Hashim-Buckey, University of California Cooperative Extension, 2006.





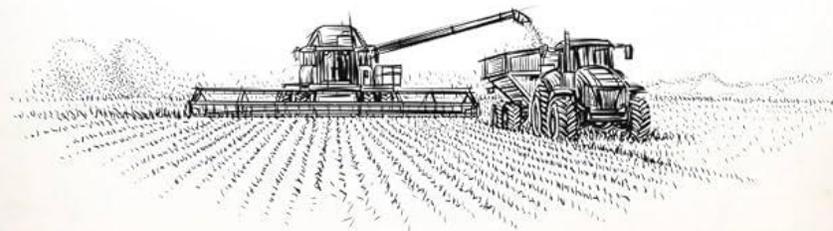
# “LA VENGANZA DEL CAMPO”

Manuel Pimentel  
ex Ministro de Agricultura Español

# MANUEL PIMENTEL

*¿Por qué el sector primario es pisoleado y perseguido  
por la misma sociedad a la que da de comer?*

# LA VENGANZA DEL CAMPO



**EL CAMPO SE VENGARÁ, AL MODO BÍBLICO, CON ESCASEZ  
Y BRUTAL ENCARECIMIENTO DE LOS ALIMENTOS, DE LA  
SOCIEDAD QUE LLEVA DÉCADAS DESPRECIÁNDOLO.**



ALMUZARA





**ADRENALINA**



!!!Creo que  
es mi maldito  
Estrés iii

**ETILENO**



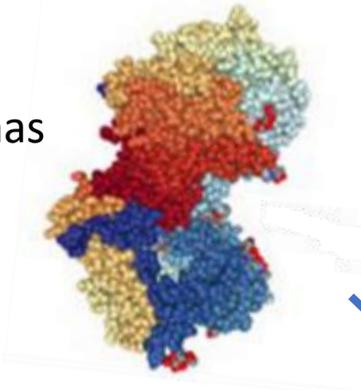


**PROTEKU**  
GRAPE GUARDS®  
PROTEKU INFRUTA  
EUROPA CHILE  
*'A grape idea'*





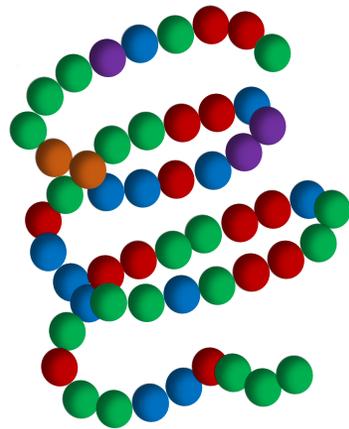
Enzimas



*ENDO-PROTEASAS*  
*ENDO-PEPTIDASAS*

**HIDRÓLISIS ENZIMÁTICA**

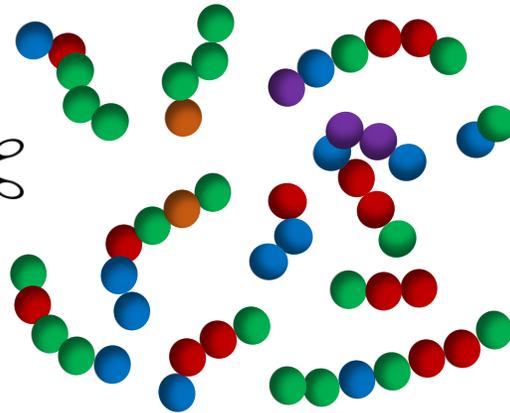
No vale solo el nombre



**PROTEÍNA**

( PM > 10.000 Da )

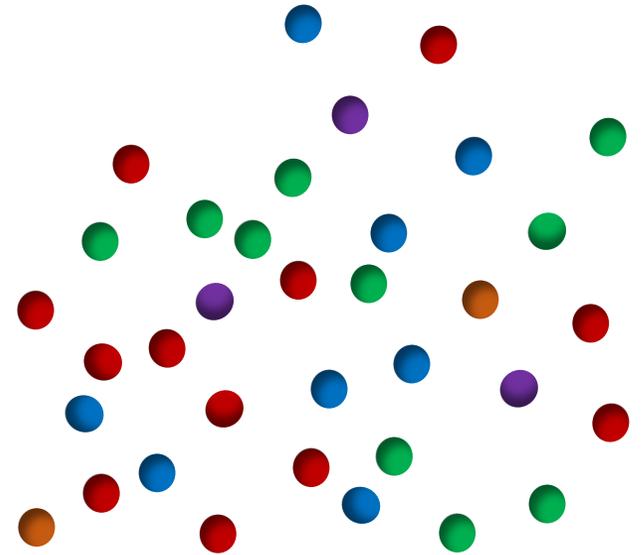
**< 2,0 %**



**PEPTIDOS**

( PM 10.000 - 240 Da )

**74 - 76 %**



**AMINOACIDOS**

( PM < 240 Da )

**22 - 24 %**

**DISTRIBUCIÓN PORCENTUAL DE PESOS MOLECULARES**



- Tipo de extracción y concentración
- pH ácido.
- Concentración de Alginatos > 1,5 %.
- Tamaños moleculares < 30.000 Da.
- Compatible con Calcio ( 800 ppm )
- Que no se corte.
- Ensayos de actividad biológica y ensayos de campo.



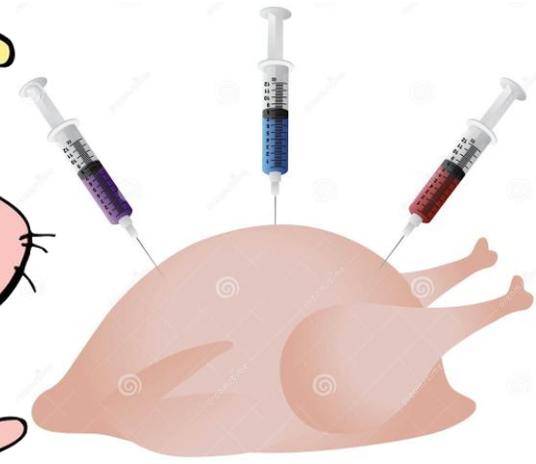
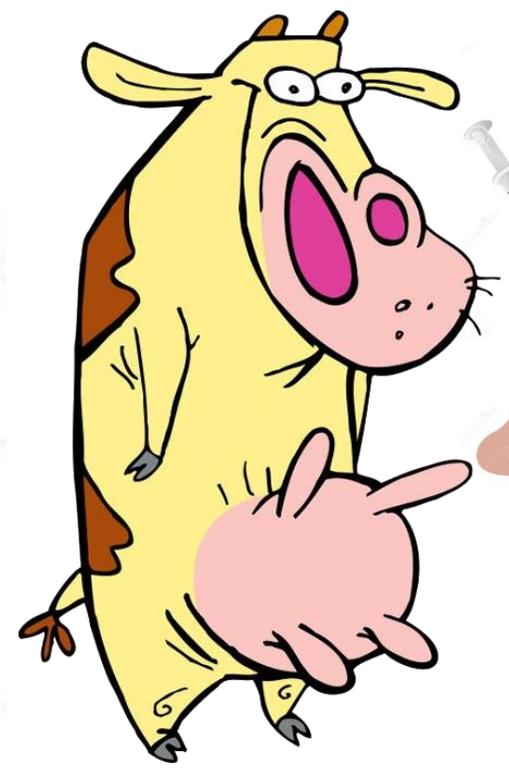


"La realidad está definida con palabras.  
Por lo tanto, el que controla las  
palabras controla la realidad"

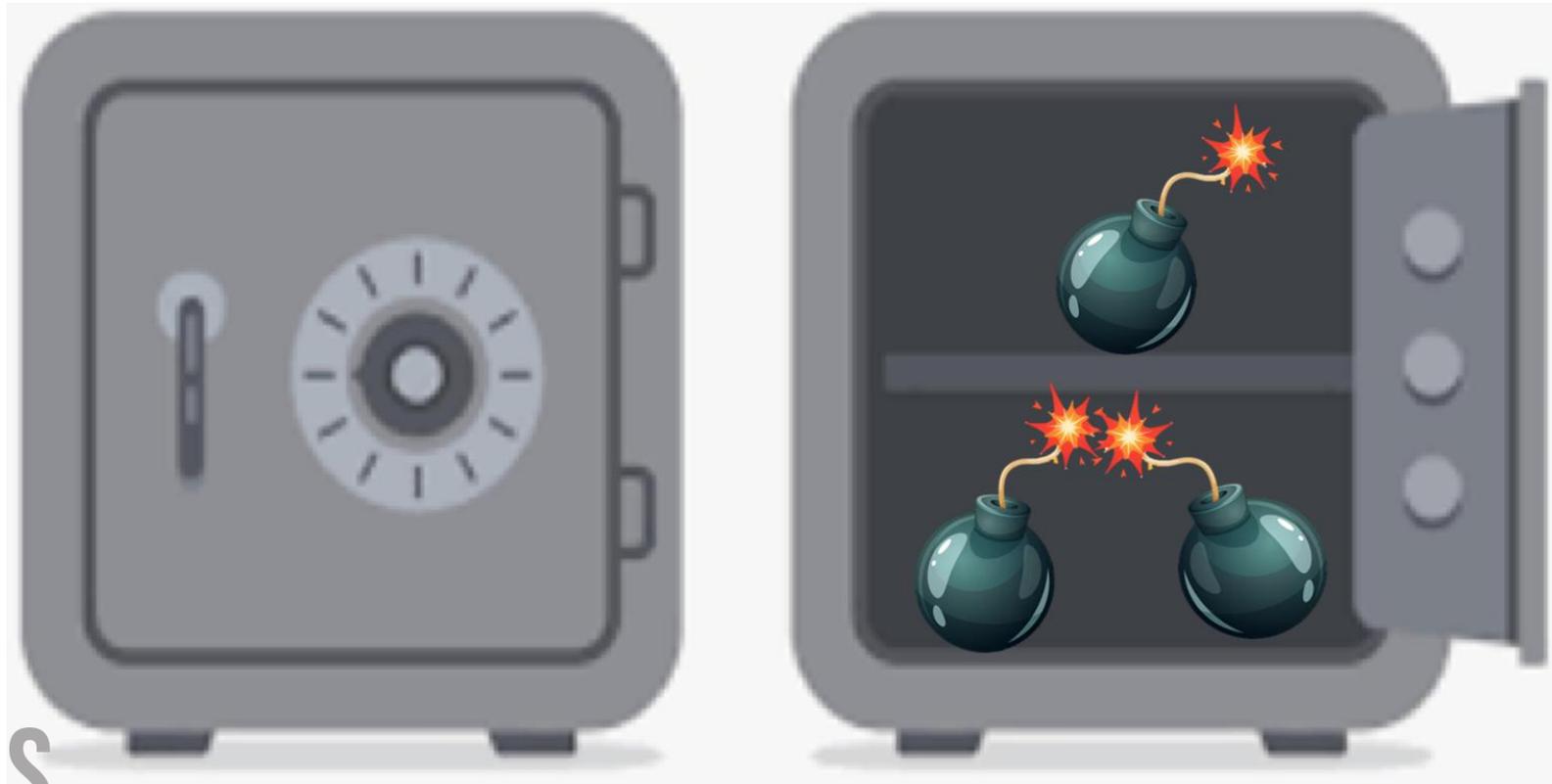
# Hormonas v/s Reguladores de Crecimiento Vegetales (RCV o PGR)



1891 - 1937



*De las peores amenazas, la interna es la más peligrosa, están sentados acá con nosotros y algunos trabajan con ustedes.*





**“Lo que se hereda no se hurta”**

Source: unknow Brazilian variety. C. Santana 2025







**PROTEKU**  
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PROTEKU EUROPA  INFRUTA CHILE

*'A grape idea'*



**Fall in love with the problem, not the solution**

Uri Levin  
1965

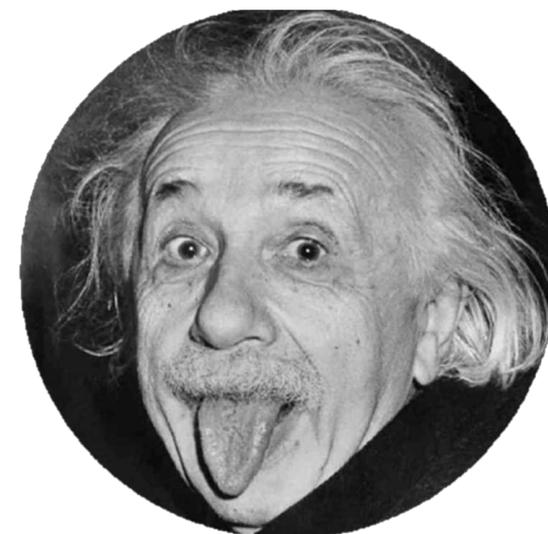




## Aceleremos una conclusión

Frente a los siguientes escenarios, nos vemos obligados a aplicar tecnología de punta, simple o básica, queramos admitirlo o no: el **mercado está cambiando rápidamente**, las **variedades están cambiando**, los entornos de **producción y el clima están cambiando de alguna manera**, el comportamiento de los **consumidores está evolucionando**, y ¿pretendemos seguir haciendo lo mismo para siempre...?

No podemos esperar que las cosas cambien si seguimos haciendo lo mismo.



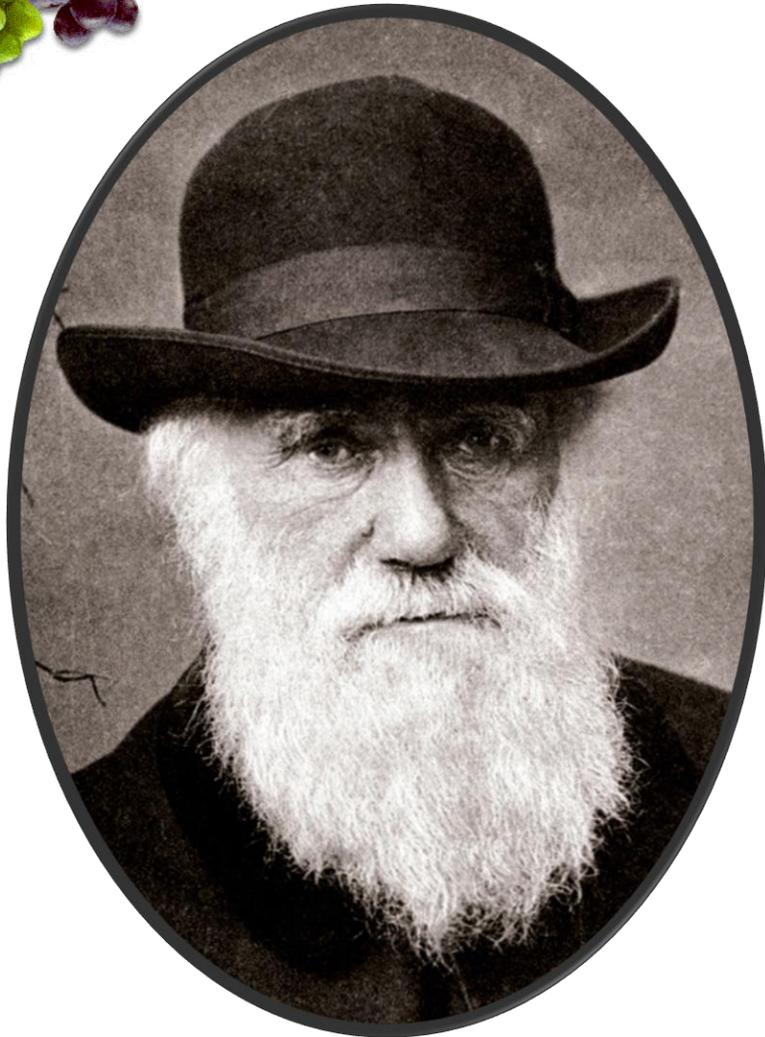
*Albert Einstein*

1879 - 1955

# The big Picture

- We operate in a **highly integrated and interconnected business environment.**
- In all **mature markets** (USA, UK, EU, Japan, and soon Korea and Taiwan), **our focus is on retail, targeting year-round, 52-week supply.**
- **What happens in almost every grape-producing and/or exporting country in the world has a direct impact on our business.**
- **We cannot analyze our activity solely from a local perspective.**
- **The challenges we face are cross-cutting, and we share several common factors: climate uncertainty, an unstable political and logistical environment, and consumers.** In most cases, the **consumers are the same**, regardless of the origin of the grapes.





*"It is not the strongest species that survives, nor the most intelligent. It is the one that adapts best to change"  
..... and the one that learns to innovate  
(that was me, Coco Salgado).*

*Phrase attributed to Charles Darwin*

1809 - 1882



## Nuestra Tesis es:

Entonces, la palabra que refleja estos tiempos es:

**incertidumbre.**

Ante ello, solo hay dos caminos:

Vender e irse del negocio lo antes posible, antes

de causar y causarse más daño, o quienes

decidan quedarse, deberán **invertir y controlar**

los factores que **pueden y deben ser controlados.**

No existimos para producir uvas; existimos porque alguien las elige. Ese alguien es el **consumidor final**.

La pregunta estratégica es sencilla: ¿qué tan cerca estamos de ellos? Hoy gestionamos la relación con nuestro cliente directo, pero nuestro futuro lo define el consumidor —**el cliente de nuestro cliente**— y hoy no estamos interactuando con él.





This raises a fundamental question: are we a market-driven business or a production-driven one?

Esto plantea una pregunta fundamental: ¿somos una empresa orientada al mercado o una orientada a la producción?



Three metal shims of different thicknesses are shown against a textured, light-colored background. Each shim is a flat, rectangular piece of metal with a circular hole at the top. The shims are arranged in a fan shape, with the 15 mm shim on the left, the 16 mm shim in the middle, and the 17 mm shim on the right. The labels are printed in black text on the surface of each shim.

15 mm

16 mm

17 mm



# Global Table Grape Production Trends



- **Northern Hemisphere Expansion**

There are now *more table grape-producing regions in the Northern Hemisphere* than in the Southern Hemisphere.

- **India's Unique Position**

India is currently the only country with production overlapping Southern Hemisphere timelines.

**Main challenge:** Transitioning to more advanced genetic varieties, on gain as we speak **Key need:** Improve post-harvest management — currently a critical bottleneck.

- **China: Year-Round Supply**

China is expected to have **12-month availability** of table grapes. While volumes may vary, especially from **December to March**, they'll remain present year-round. Supply will come from: Near-Mediterranean regions / Subtropical and tropical zones / Cold storage (for extended shelf life)

- **Australia: Moving Toward Year-Round Production**

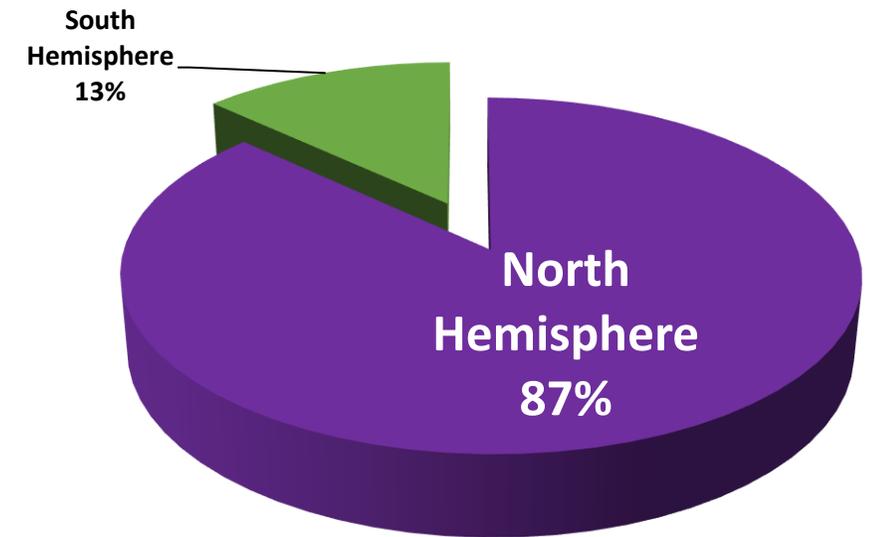
Australia is on track to supply grapes throughout the year. Not from the same areas — mostly coastal zones, while not yet year-round, the shift is underway.

- **Central Asia: Rapid Growth**

Central Asia is **quickly expanding** its fruit agriculture, especially in table grapes, increasing its market presence.

- **Tropical Regions Extending the Season**

Countries like **Peru, Brazil, northern Namibia, Senegal, and Jalisco (Mexico)** are pushing the limits of the traditional season. Their campaigns now extend into the shoulder seasons of: **California / China / Egypt / Morocco / Spain / Italy (notably Sicily, an emerging player).**



Source: USDA Gain Report 2024 compiled by O. Salgado 2025.



# *The Market is the Market*

## *Sainsbury's October – November 1985*



**SPECIAL OFFER**

**AMERICAN CLASS I**

**Seedless White Grapes** loose-per lb

~~£1.85~~  
**£1.75**

**GOOD FOOD COSTS LESS AT SAINSBURY'S**



2022 and 2023 October – November  
£1.50 – 1.75 /lb within the top high-end UK retails



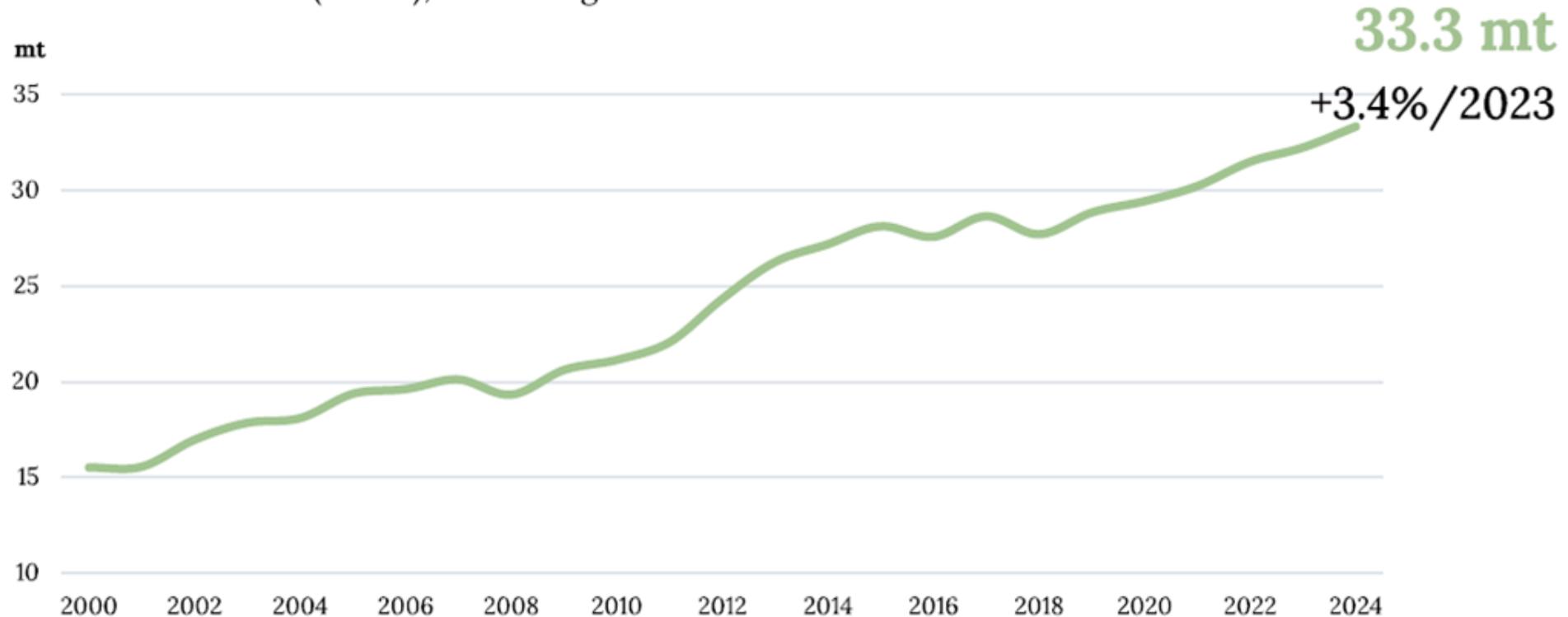


# Table grape production

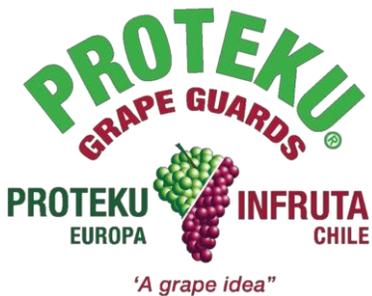
Table grape refers to fresh grape destined for direct human consumption.



Global table grape production in 2024 is estimated at 33.3 mt, a change from 2023 of +3.4%, mainly driven by increased production in China. Since 2000, global table grape production has more than doubled, recording an average annual growth rate of +3.1%. The top five producing countries are China (14.2 mt), India (3.2 mt), Egypt (1.8 mt), Türkiye (1.8 mt), and Uzbekistan (1.4 mt), which together account for 67% of the world total.



Evolution of the global table grape production, 2000 - 2024

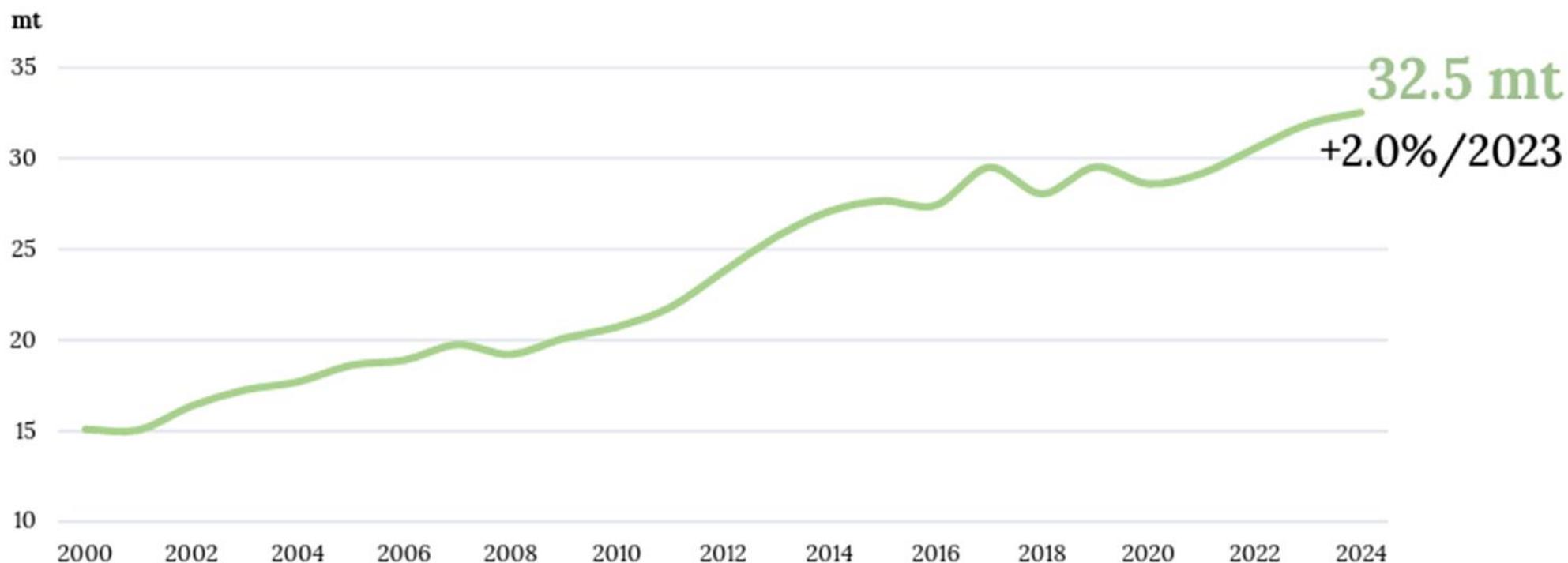


# Table grape consumption

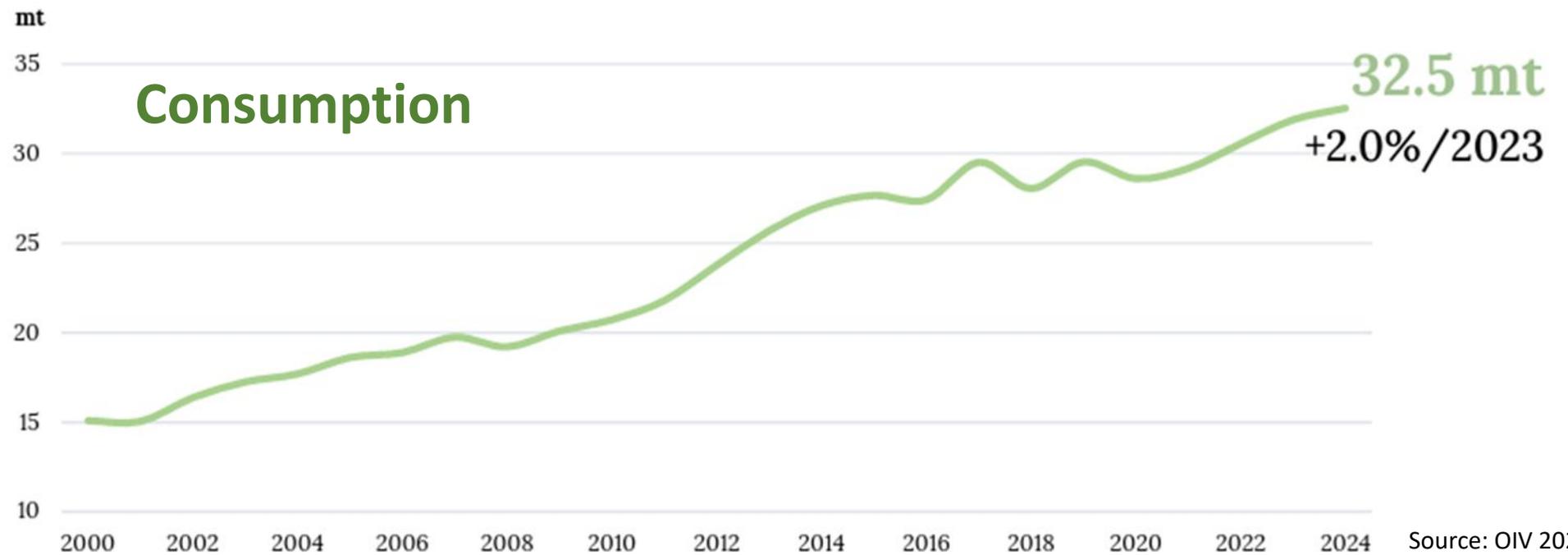
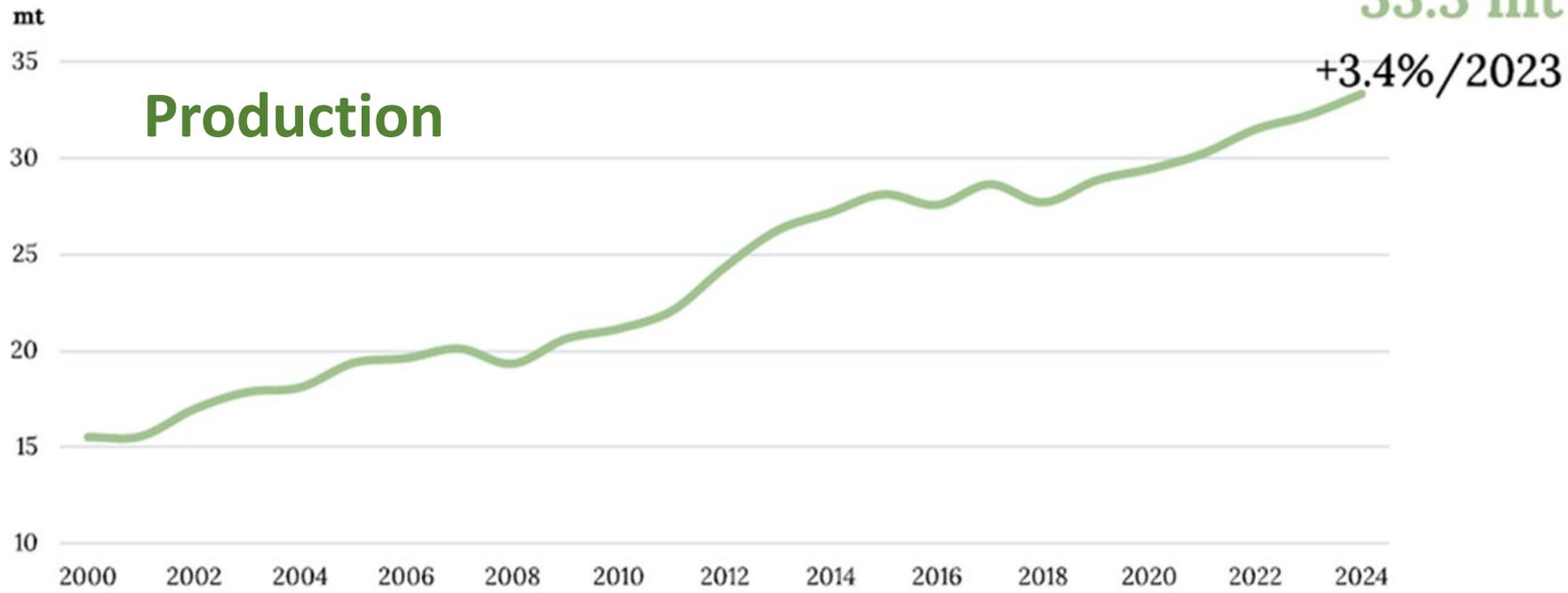
Table grape refers to fresh grapes destined for direct human consumption.



Global table grape consumption in 2024 is estimated at 32.5 mt, showing a 2.0% increase compared to 2023. This growth was mainly driven by a 4% increase in consumption of China, which holds a 42% share of the global market. The top three consuming countries are China (13.7 mt), India (3.0 mt), and Egypt (1.7 mt), which together account for 57% of the world total.



Evolution of global table grape consumption 2000 - 2024



## Table Grape major production countries

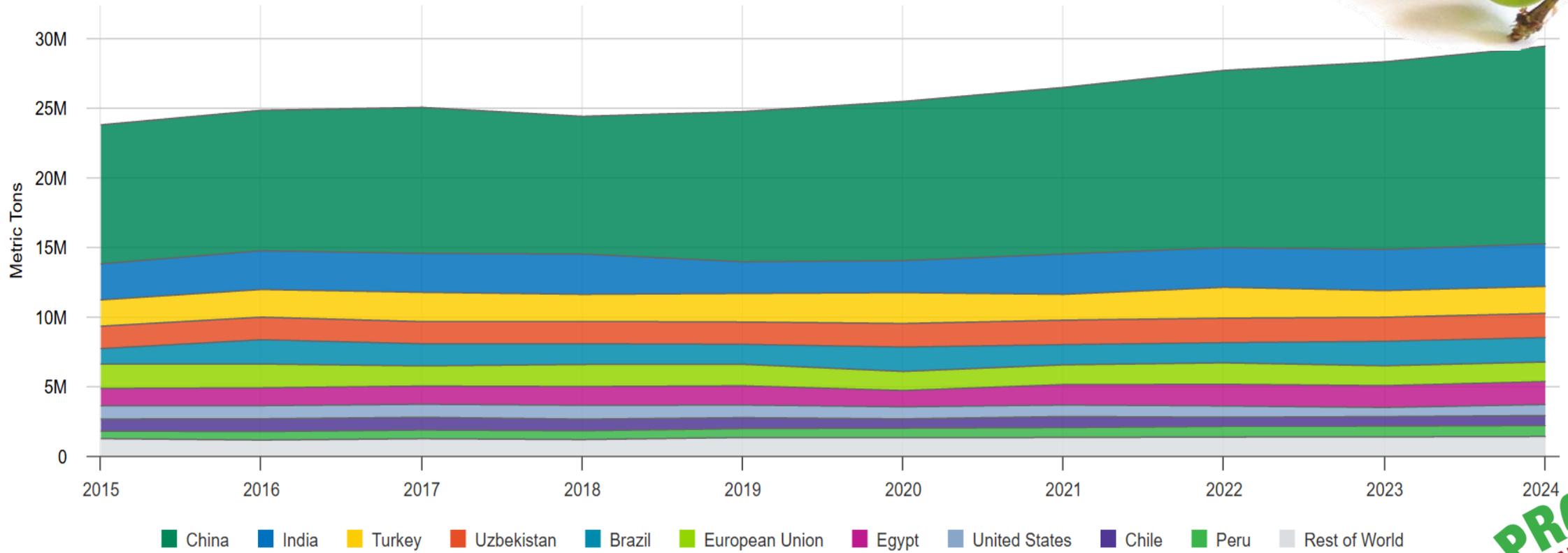
Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024 % world
<b>China</b>	10.0	10.1	10.5	9.5	10.6	11.5	12.0	12.8	13.5	14.2	43%
<b>India</b>	2.3	2.2	2.4	2.5	2.5	2.7	2.8	2.8	3.1	3.2	10%
Egypt	<i>1.6</i>	<i>1.6</i>	<i>1.6</i>	<i>1.6</i>	<i>1.5</i>	<i>1.1</i>	<i>1.4</i>	<i>1.7</i>	<i>1.8</i>	<i>1.8</i>	6%
Türkiye	1.9	2.0	2.1	1.9	2.1	2.2	1.9	2.1	1.8	1.8	5%
Uzbekistan	<i>1.2</i>	<i>1.2</i>	<i>1.2</i>	<i>1.2</i>	<i>1.2</i>	<i>1.2</i>	<i>1.3</i>	<i>1.4</i>	<i>1.4</i>	<i>1.4</i>	4%
Brazil	0.7	0.6	0.9	0.8	0.7	0.8	0.9	0.8	0.8	1.0	3%
Italy	1.1	1.1	1.0	1.0	1.0	1.0	1.0	1.0	0.9	0.9	3%
<b>Afghanistan</b>	<i>0.6</i>	<i>0.6</i>	<i>0.7</i>	<i>0.7</i>	<i>0.8</i>	<i>0.7</i>	<i>0.7</i>	<i>0.7</i>	<i>0.8</i>	<i>0.9</i>	3%
USA	0.9	0.9	0.9	1.0	0.9	0.9	0.8	0.8	0.7	0.8	3%
Peru	<i>0.5</i>	<i>0.6</i>	<i>0.5</i>	<i>0.5</i>	<i>0.5</i>	<i>0.6</i>	<i>0.7</i>	<i>0.8</i>	<i>0.9</i>	<i>0.8</i>	2%
<b>Other countries</b>	7.4	6.6	6.7	7.0	7.1	6.8	6.8	6.8	6.6	6.5	19%
<b>World</b>	<b>28.1</b>	<b>27.6</b>	<b>28.6</b>	<b>27.7</b>	<b>28.8</b>	<b>29.4</b>	<b>30.2</b>	<b>31.5</b>	<b>32.2</b>	<b>33.3</b>	<b>100%</b>

Data in Italic letters are OIV forecast

Source: OIV 2024

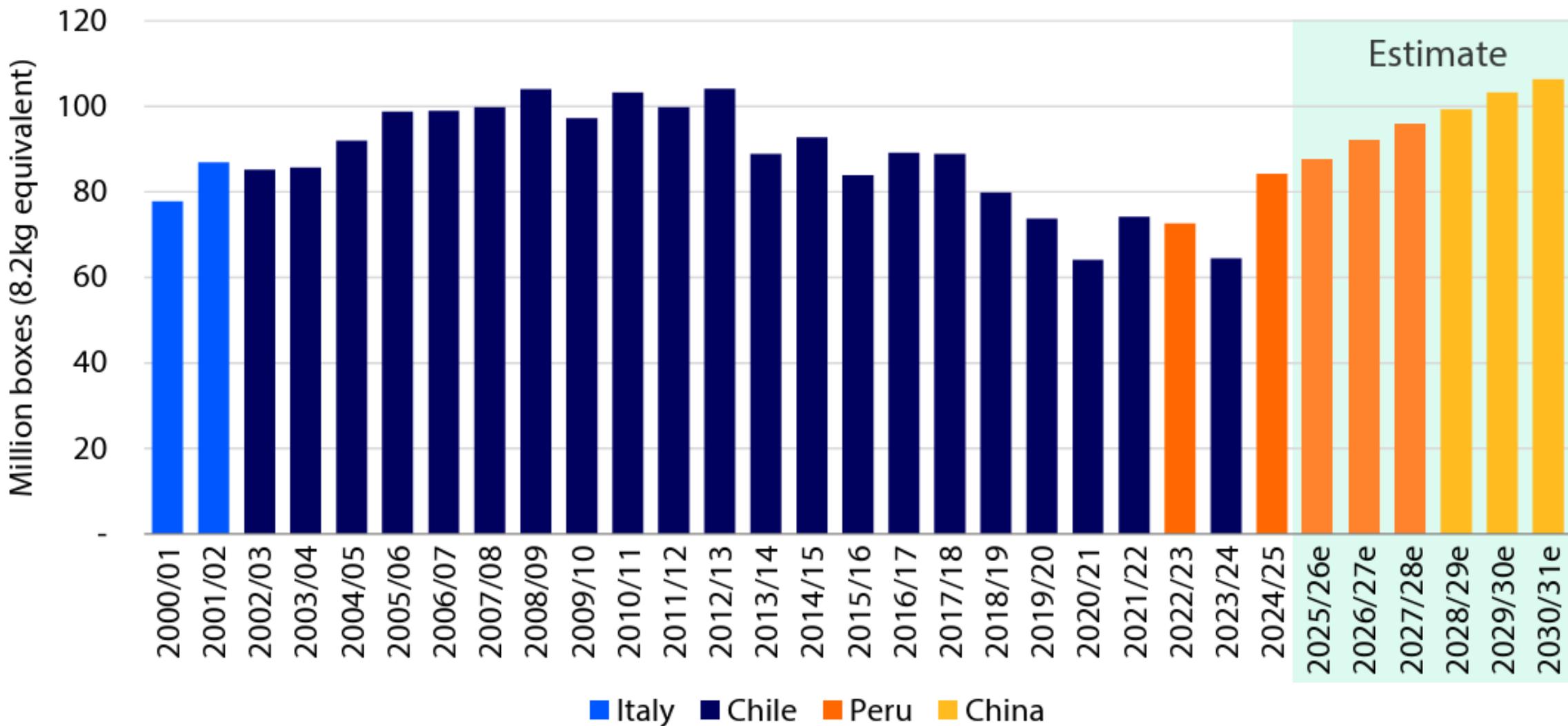


# World Table Grape Production map





# A new table Grape Order

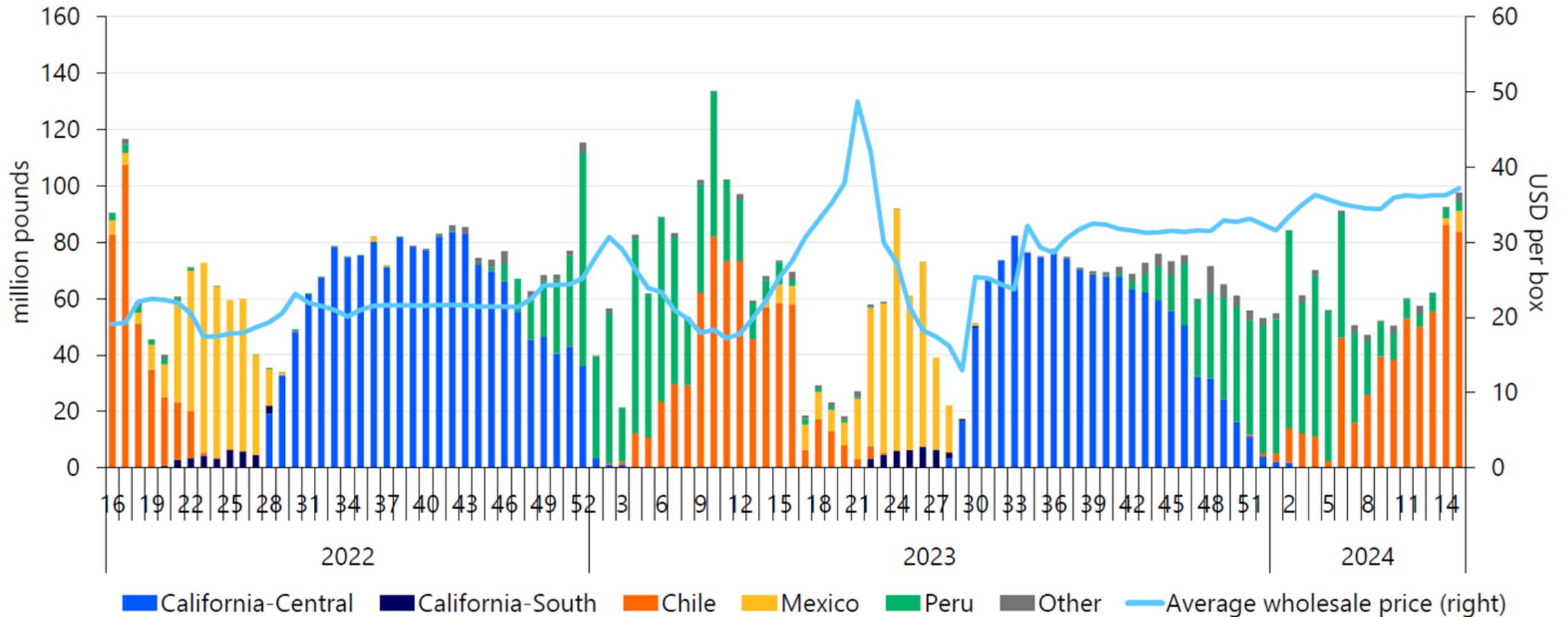


Note: For countries with seasonal reporting (Italy and China), data reflects the first year of the campaign.  
Source: Trade Map, GATS, Comtrade, Odepa, Senasa, Eurostat, RaboResearch 2025

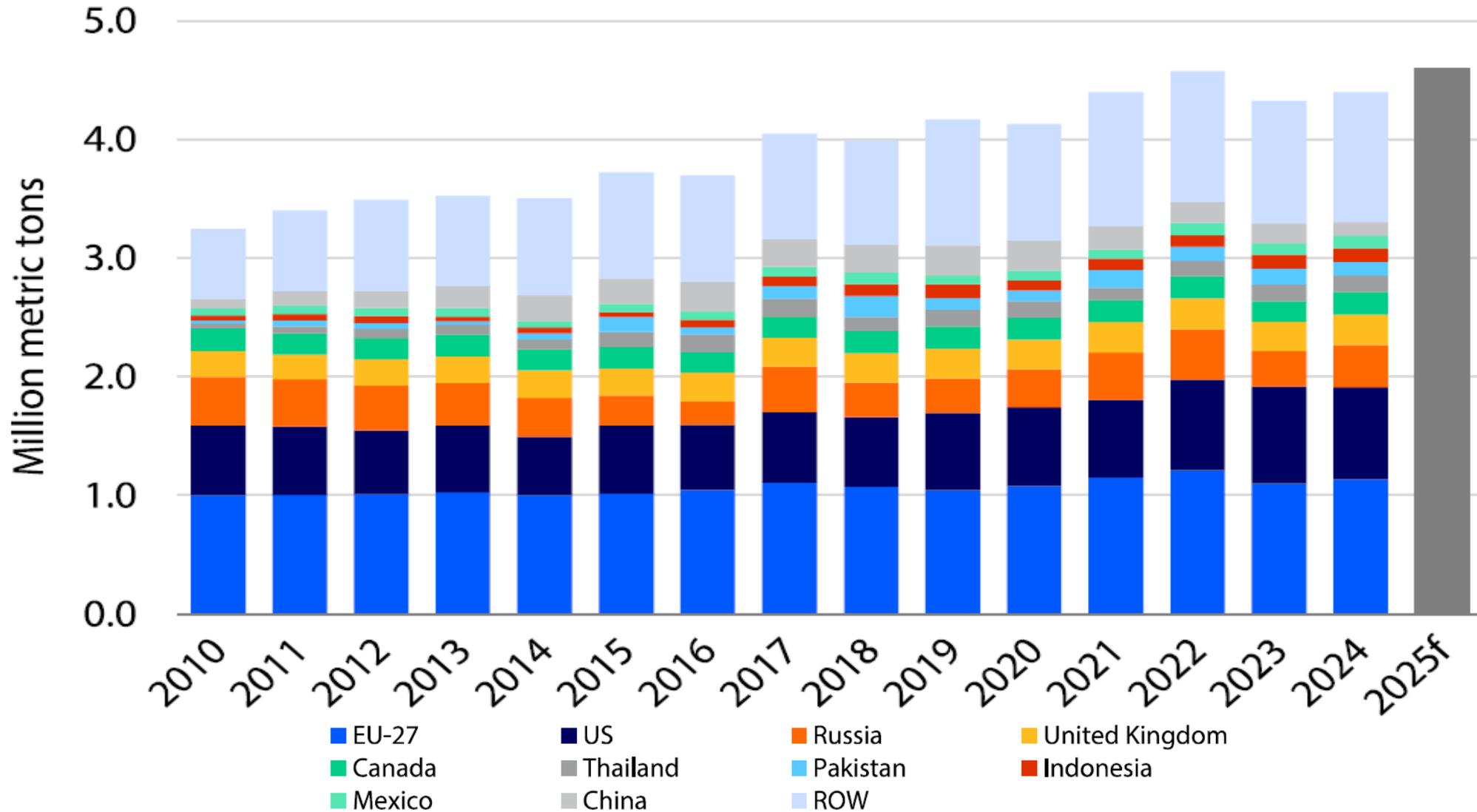


# The 52 weeks dilemma of constant supply

*Weekly table grape arrivals and 'shipping-point' prices in the US, 2022-2024*



# Table grape Import dynamics



- 1 Alta capacidad de visualización espacial
- 2 Velocidad de procesamiento y reacción
- 3 Toma de decisiones bajo presión
- 4 Planificación a corto y mediano plazo
- 5 Control emocional
- 6 Patrones y automatización
- 7 Gestión del tiempo y ritmo
- 8 **Entrenamiento y memoria muscular**

- 1 High spatial visualization ability
- 2 Processing speed and reaction time
- 3 Decision-making under pressure
- 4 Short- and medium-term planning
- 5 Emotional control
- 6 Pattern recognition and automation
- 7 Time and rhythm management
- 8 **Training and muscle memory**





# Hypothesis



*"Anything one man can imagine,  
another man can make real"*

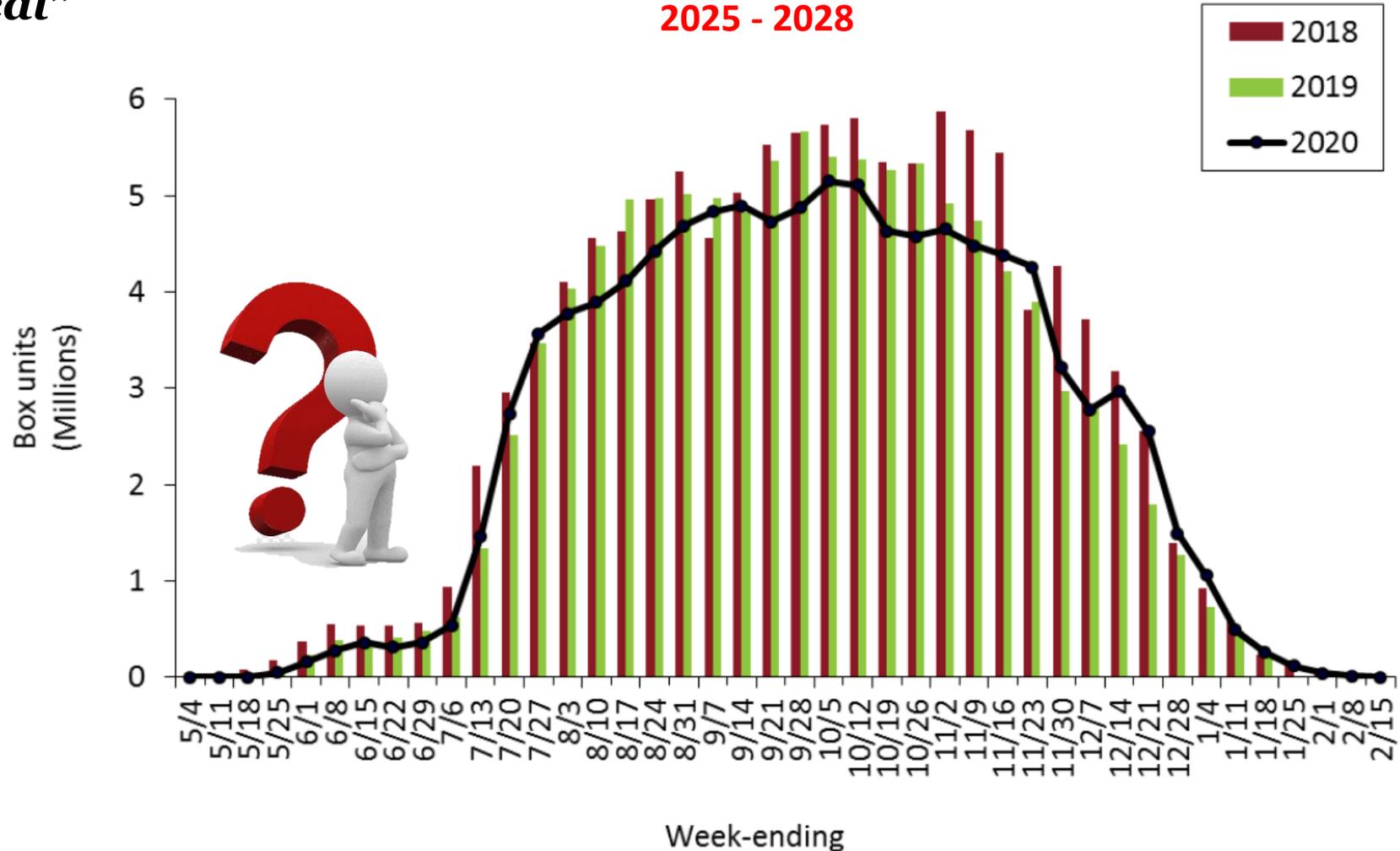


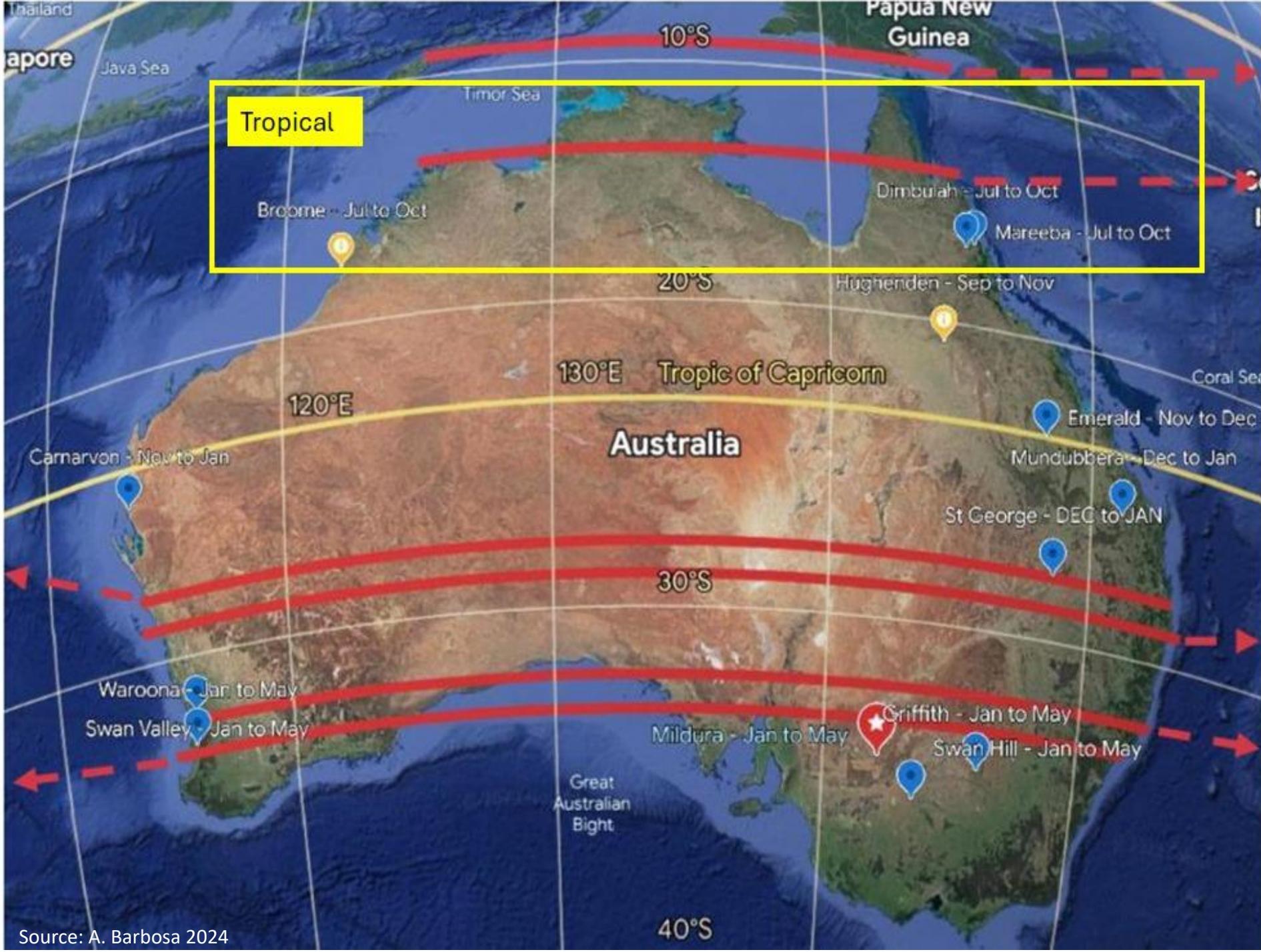
Julio Verne  
1828 - 1905

Weekly Uzbekistan Table Grape Shipments  
2025 - 2028

Weekly Chinese Table Grape Shipments  
2025 - 2028

Weekly Spain and Italy Table Grape Shipments  
2025 - 2028







UVASYS

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GRAPE GUARDS



'A grape idea'

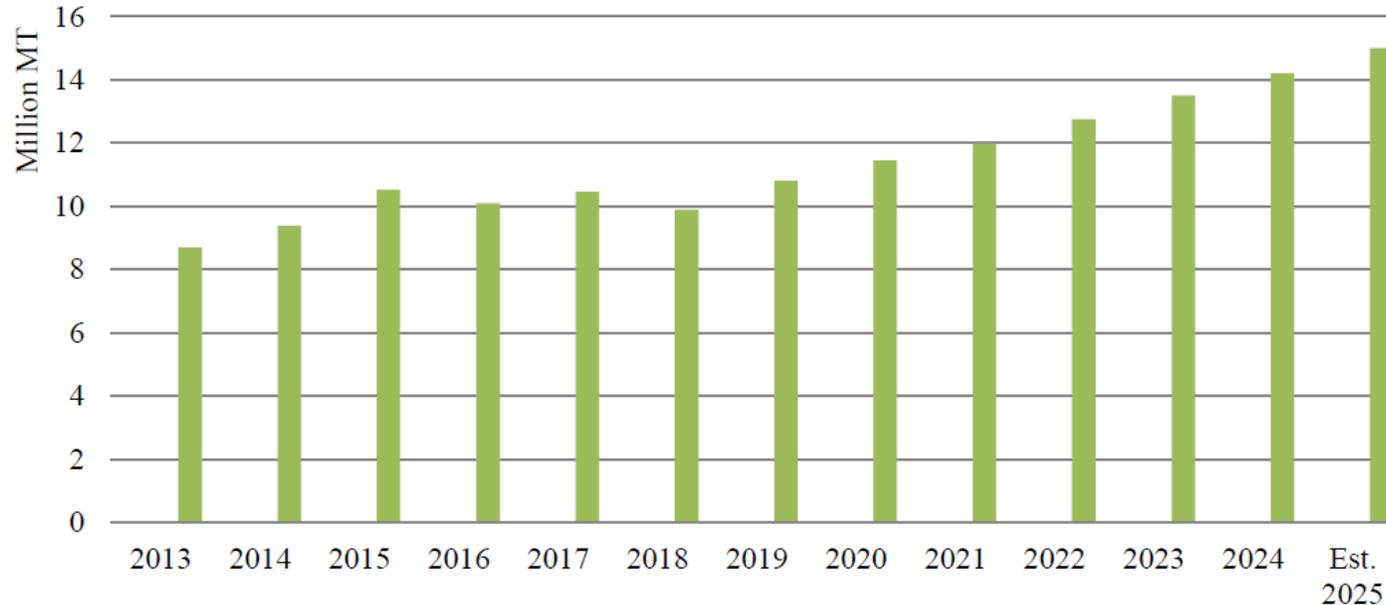
*China*

葡萄

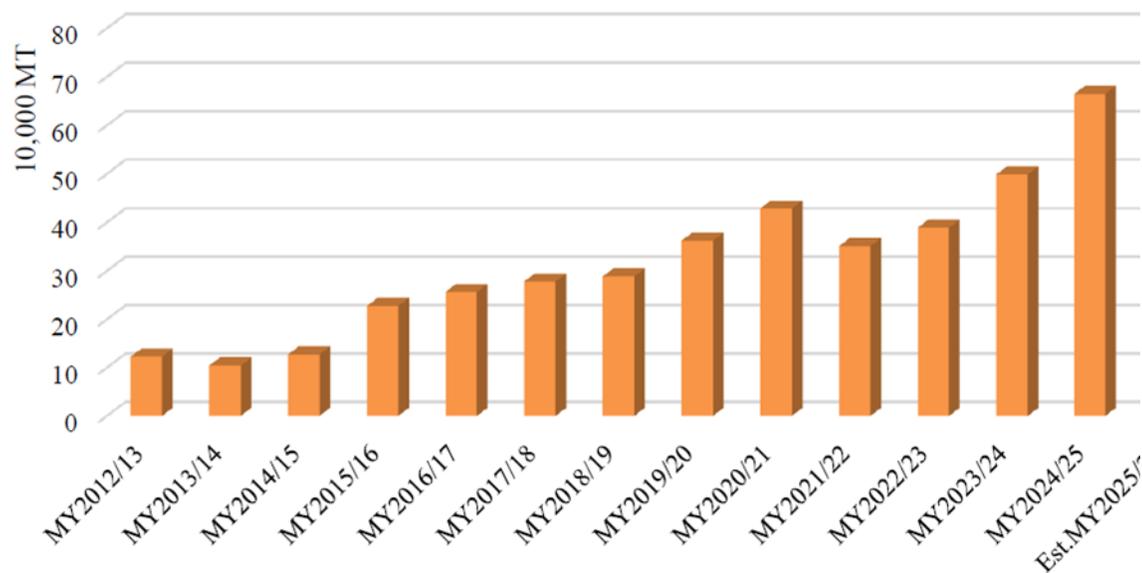
Pútao



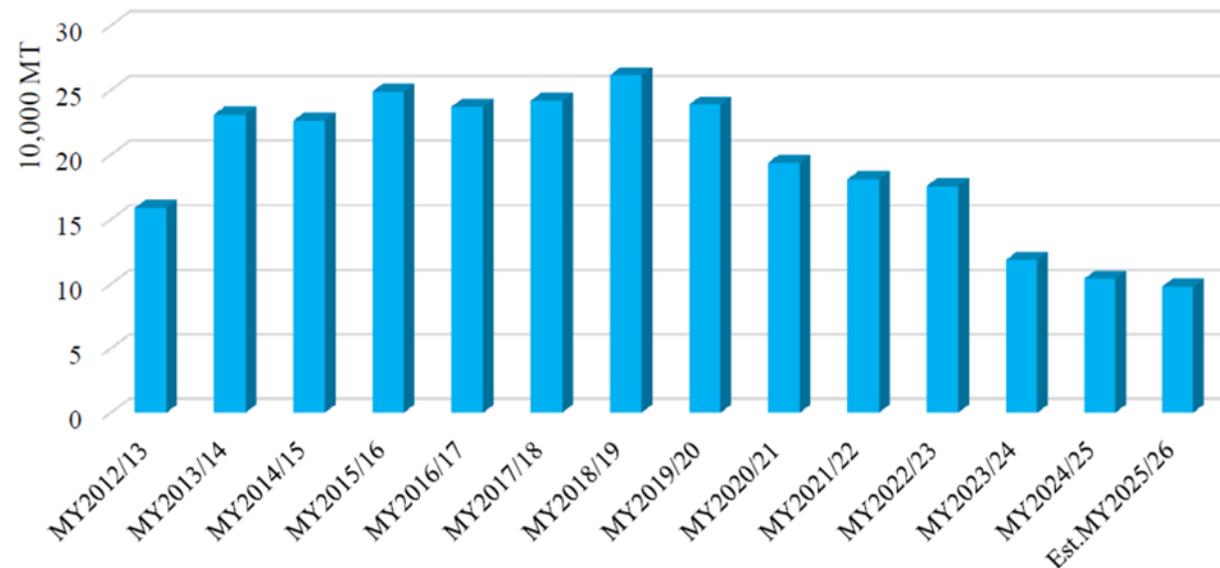
### China Table Grape production



### China Table Grape Export by Marketing year (June to May)

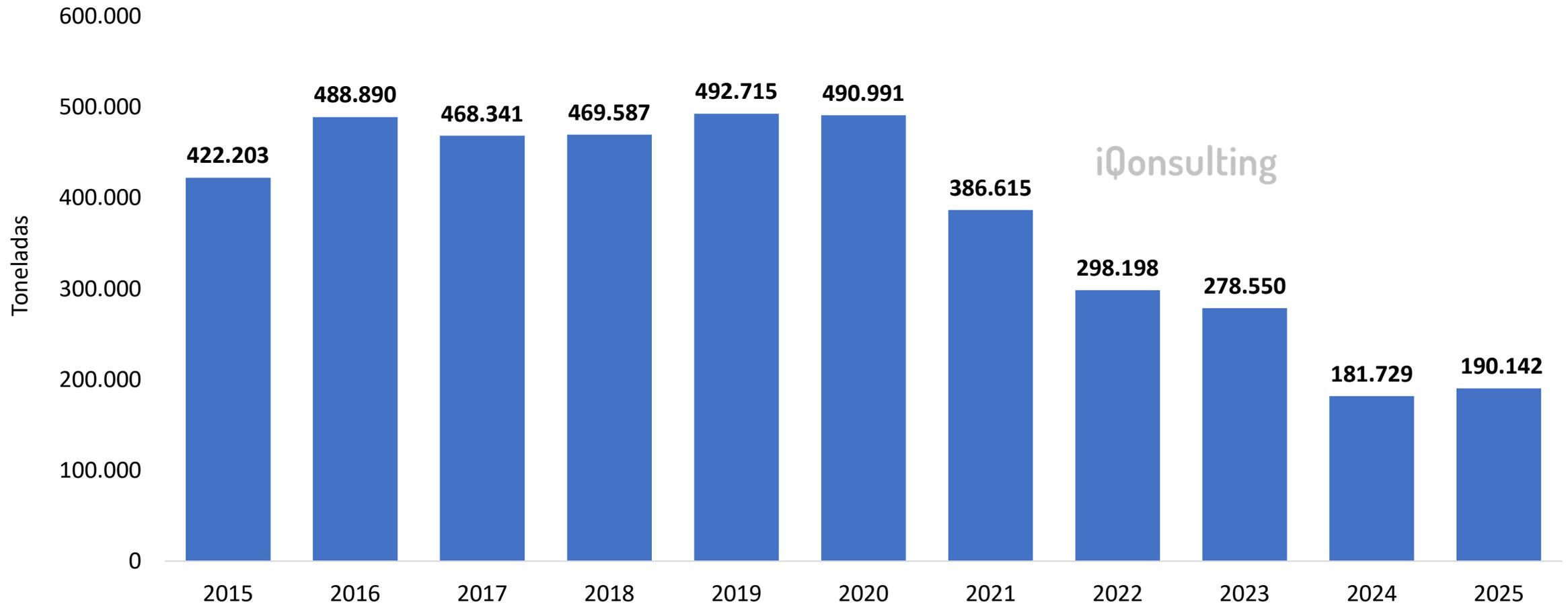


### China Table Grape Imports by Marketing year (June to May)





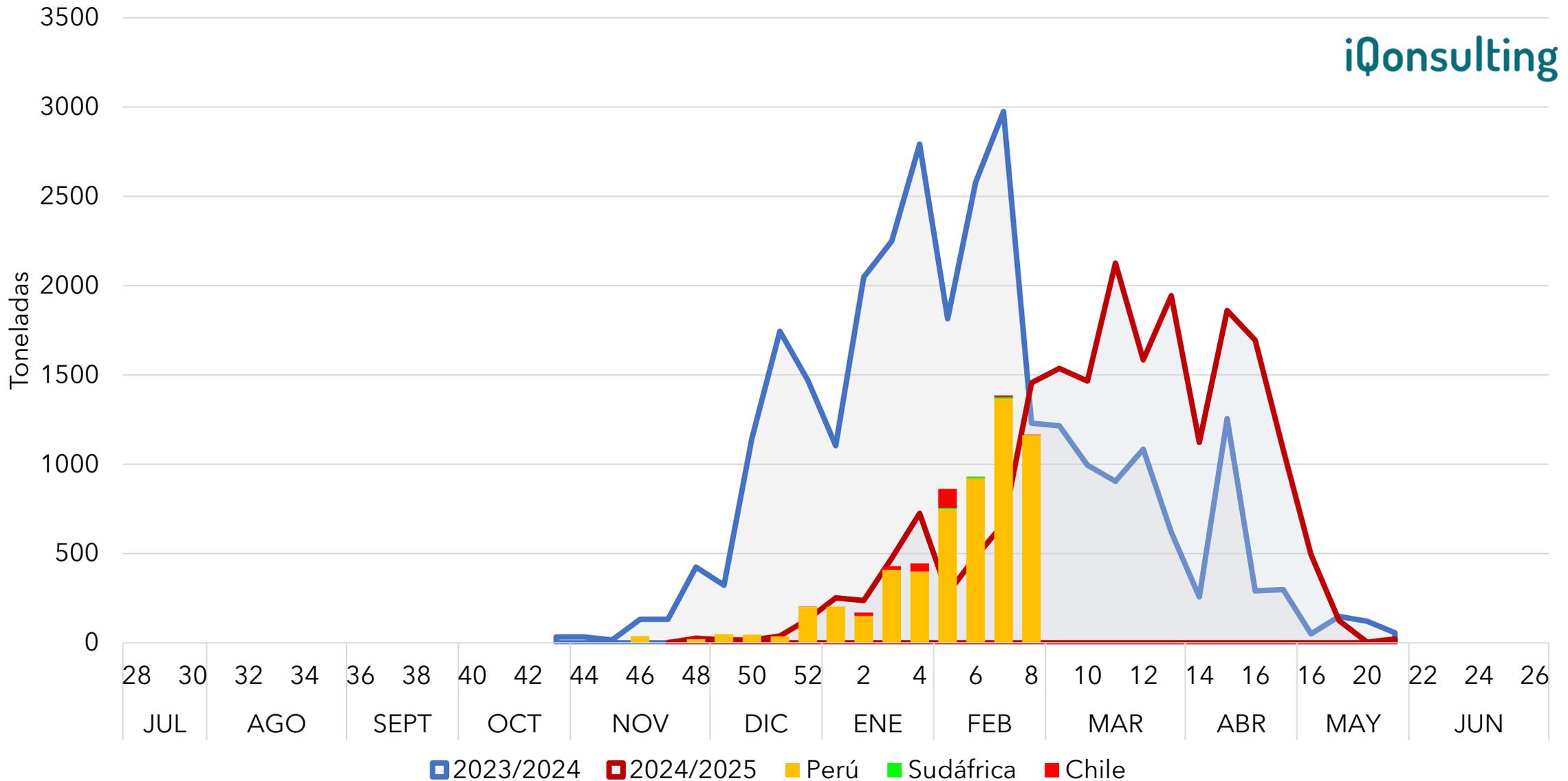
### Importaciones uva de mesa todos los orígenes vía China mainland y Hong Kong





# Arribos de Uvas Blancas sin semillas a China-HK (Perú, SA, Chile)

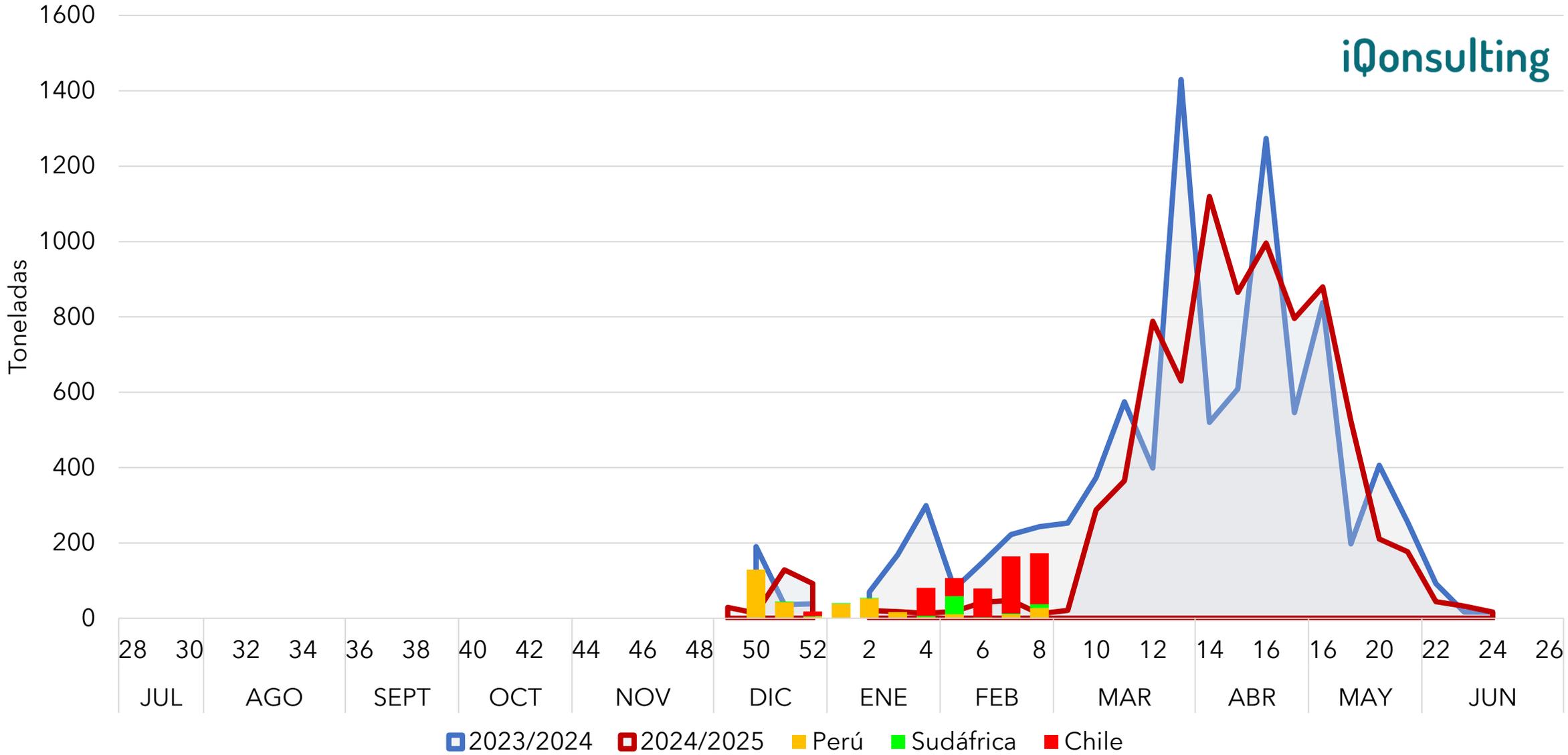
iQonsulting



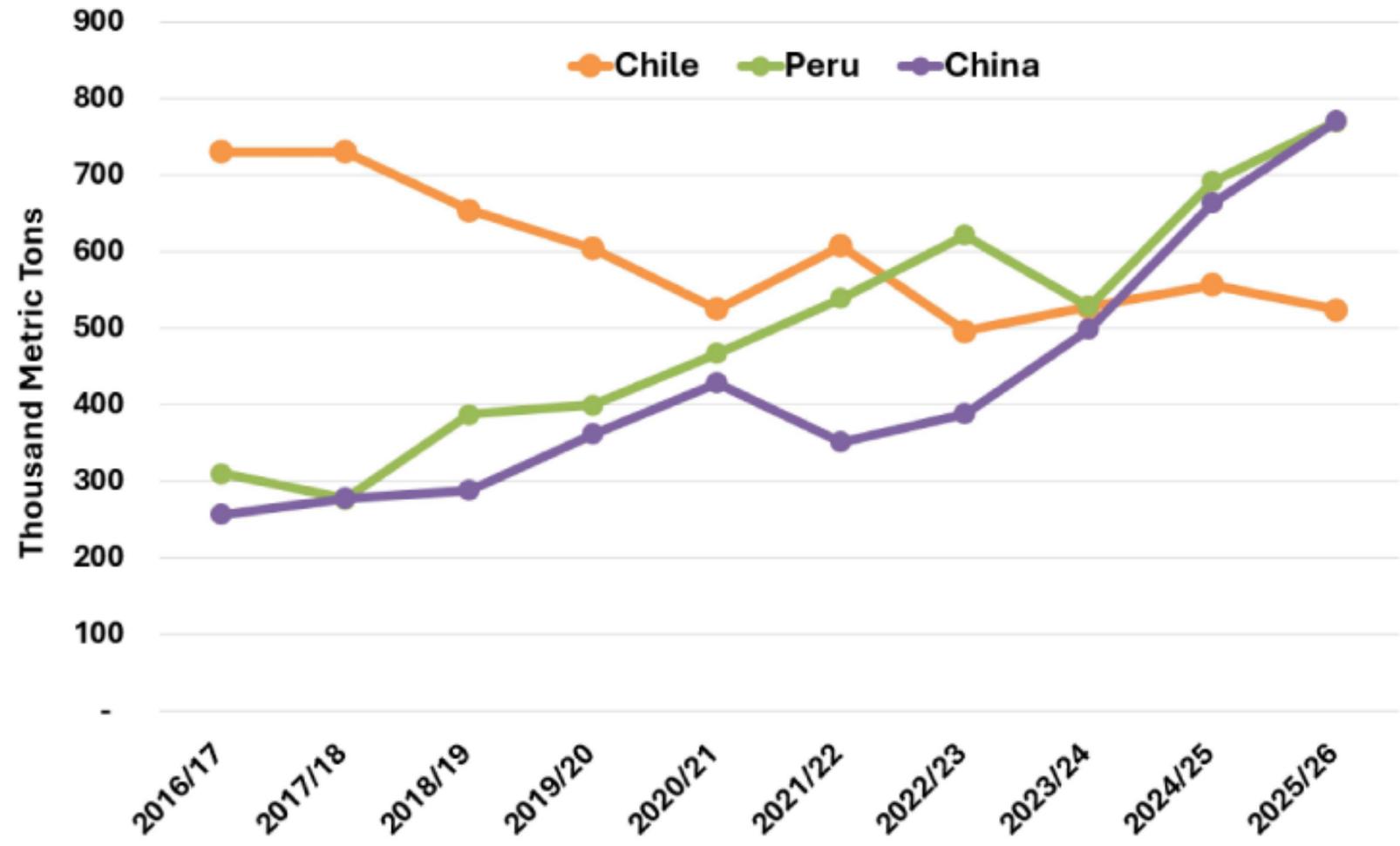


# Arribos de Uvas Rojas sin semillas a China-HK (Perú, SA, Chile)

iQonsulting



# China Forecast to Tie Peru as Top Table Grape Exporters in 2025/26

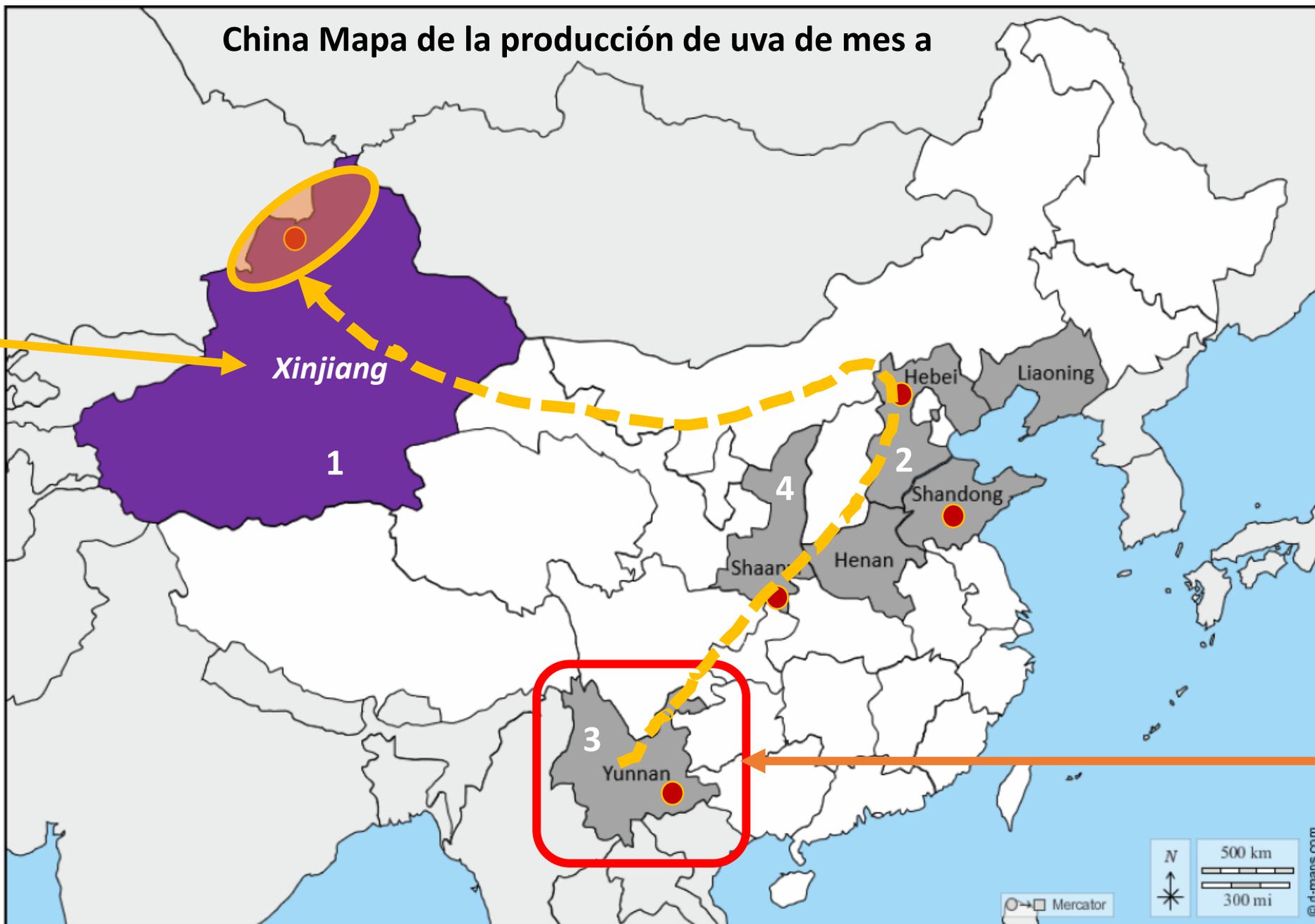


Source: USDA forecast available in PSD Online





# China Mapa de la producción de uva de mes a



20% or more of Chinese production (Xinjiang).  
Timing September till November, store till late January-February sometime

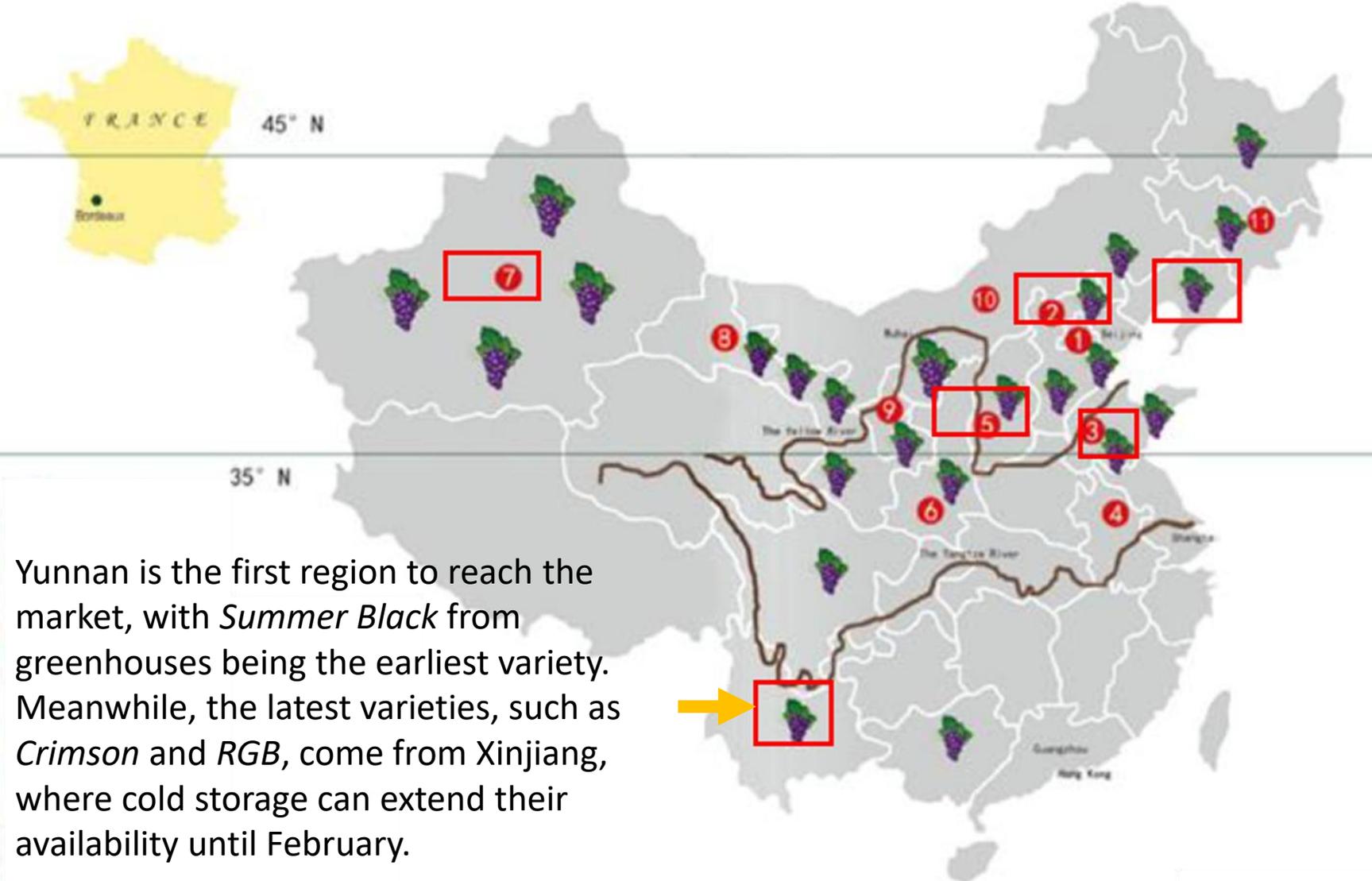
5% to 10% (Hebei, Shandong, Yunnan, Henan, Shaanxi, Liaoning)

Double pruning

# China Table Grape Production Map



China grows table grapes across almost its entire territory, with the main production areas being Xinjiang, Hebei, Yunnan, Shaanxi, Shandong, Liaoning Province, and others.



Yunnan is the first region to enter the market, with Summer Black from greenhouses being the earliest variety. Meanwhile, the latest varieties such as Crimson and RGB come from Xinjiang, where cold storage can extend availability until February.

Yunnan is the first region to reach the market, with *Summer Black* from greenhouses being the earliest variety. Meanwhile, the latest varieties, such as *Crimson* and *RGB*, come from Xinjiang, where cold storage can extend their availability until February.

- 1 Peking / Beijing
- 2 Hebei
- 3 Shandong
- 4 Yellow River area Huang Et Guad
- 5 Shanxi
- 6 Shannxi
- 7 Xinijiang
- 8 Gansu
- 9 Ningxia
- 10 Inner Menggulia – Neimenggu
- 11 North East - Dongbei

# China baja en las importaciones y cambio en las variedades importadas

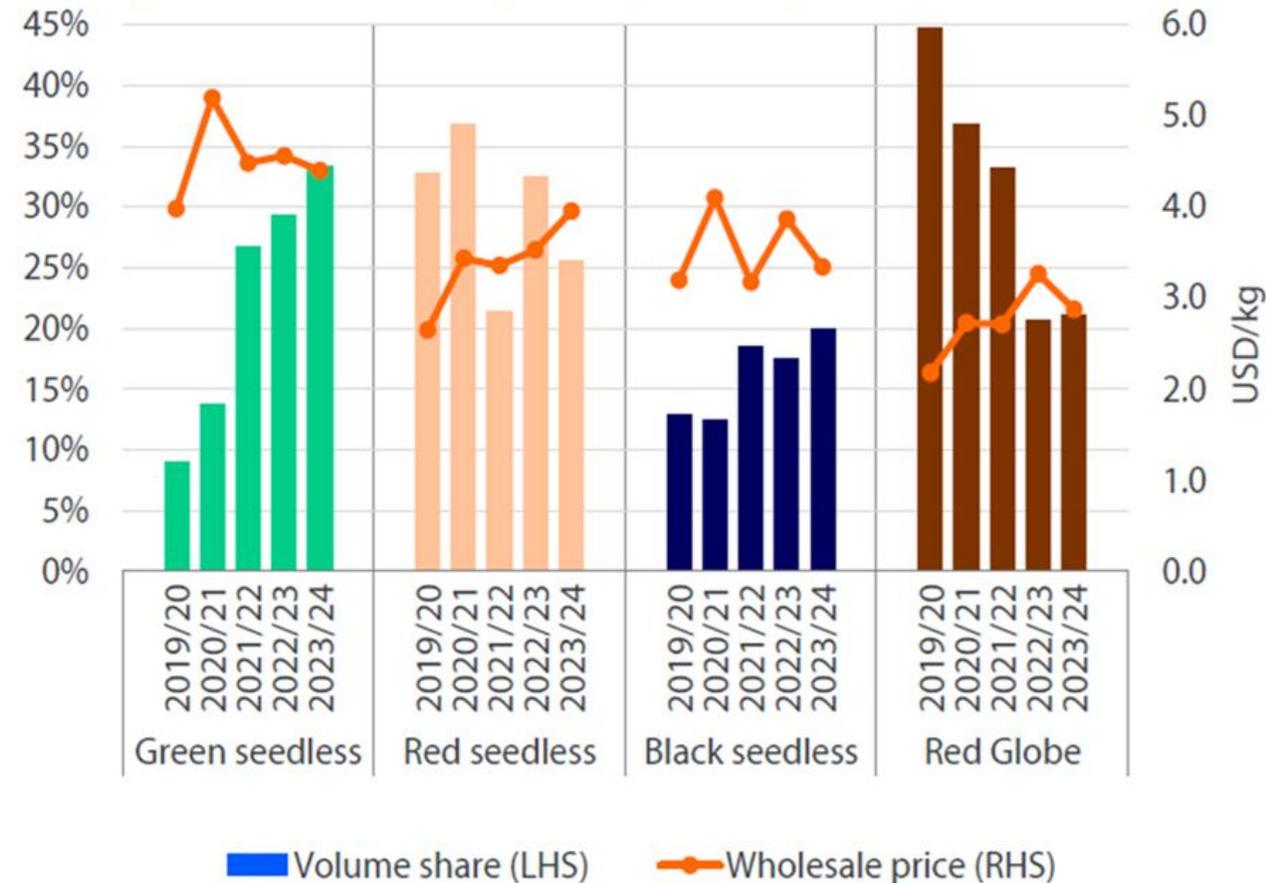
## China's Table Grape Imports and Market Trends

**Table grape imports in China continue to decline**, leading to a reduced dependence on imported grapes. Simultaneously, a varietal renewal is underway. During the 2023/24 season, **green seedless varieties** became the most traded category in the wholesale markets of **Shanghai** and **Guangzhou** (see Figure 15).

Two seasons ago, **red seedless varieties** were the most traded, while **Red Globe** dominated five seasons ago. Looking ahead, this trend of shifting leading grape varieties is expected to continue, with **green seedless grapes projected to become the dominant category**. This shift is being driven by increased domestic production, which is likely to keep **China's import volumes low**.

While **Australia**, a key player in the Chinese market, is expected to maintain its focus on **red seedless grapes**, other major exporters—**Chile, Peru, South Africa, and India**—are expanding their shipments of **green seedless varieties** to meet the evolving demand in the Chinese market.

Figure 15: Share and prices in the wholesale markets of Guangzhou and Shanghai by variety, 2019/20-2023/24



Source: RaboResearch 2024



# Shine Muscat Seedless 阳光玫瑰

Área de plantación: 1.000.000 mu (finales de 2022) esto es 66 666 ha aproximadamente

**Yunnan:** La más temprana es a finales de marzo y principios de abril, y dura hasta finales de mayo y principios de junio. La segunda cosecha fue pequeña en febrero.

**Guangxi y Guangdong:** Guangxi desde finales de junio hasta principios de julio, luego Guangdong. Hasta finales de septiembre.

**Hunan, Sichuan, Chongqing, Jiangsu, Zhejiang y Shanghai:** agosto a octubre

**Henan y Hebei:** de septiembre a principios de noviembre

**Provincias del noreste:** finales de diciembre







# PGR Management

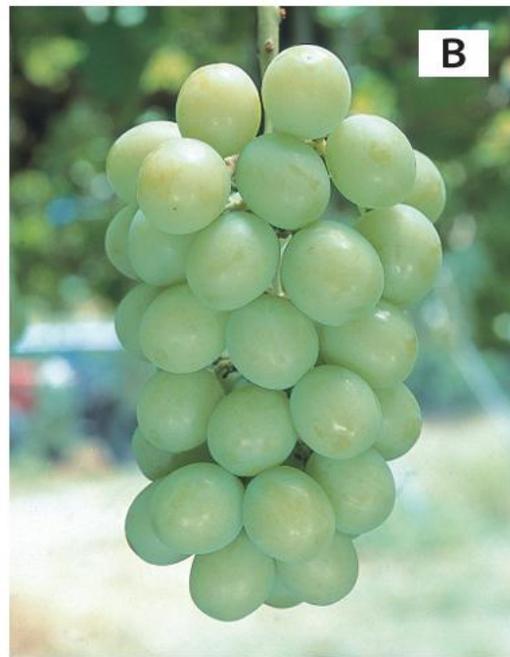


## General program or what they repeat as a Mantra:

- 1 Before bloom 200 – 300 ppm Streptomycin (2day).
- 2 95% blossom 15—20 PPM GA3 and 2-5 PPM CPPU
- 3 After flower season 10-15 ppm GA and 2-5 ppm CPPU (13-15days after bloom).

## Table Grape Production Protocol – Key Growth Stages and Applications:

- 1 Early Calyptra/Blom Stage: Apply Streptomycin at 200 ppm.
- 2 Full Bloom ( $\approx 110\%$  flowering): Apply Gibberellic Acid ( $GA_3$ ) at 25 g/ha.
- 3 End of Shatter Phase (berries  $\sim 4$  mm): Apply Cytokinin (CK) at 2 g a.i./ha (*active ingredient per hectare*).
- 4 Berry Growth Stage: Apply Gibberellic Acid ( $GA_3$ ) at 20–30 g/ha.



Seeded bunch (B)



Seedless bunch (C)



Country/Region	Key Areas	Notes		
Japan	Yamanashi, Nagano, Okayama, Yamagata	Home origin; growing dominance and popularity		
China	Yunnan, Hunan, Sichuan, Guangxi, others	Massive expansion; large export volumes; diverse regional production		
South Korea	Gyeongsangbuk-do regions	Increasing production; new market access including Australia		
Taiwan	?	?		
Chile	Brazil	España/Italia	India	Peru

Source: compiled by O. Salgado 2025



Source: Pictures O. Salgado September 2024 Korea

샤인머스켓  
Shine Muscat

**Korea**

產自韓國的香印青提



韩国香印青提  
Shine Muscat

品种 Shine Muscat  
产地 韩国  
上市时间 8-12月

妮娜皇后  
Nino Grapes

品种 妮娜皇后  
产地 中国  
上市时间 4-12月

蓝宝石葡萄  
Grapes

品种 蓝宝石葡萄  
产地 中国

Korean Shine Muscat

30 Oct 2024. 99 Ranch Market Westwood Blvd, Los Angeles. California. USA





Store checking by J. Pandol, 5<sup>th</sup> February 2025. Cherries from NZ and Peruvian Shine Muscat





Peruvian Shine Muscat Philadelphia warehouse 30<sup>th</sup> January 2026

Shine Muscat de China en Mumbai y Delhi Enero fines 2026



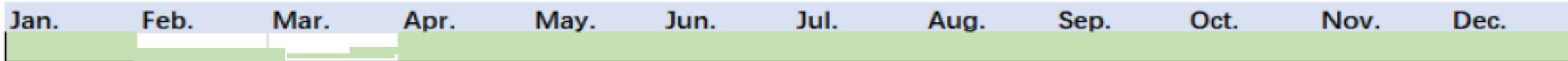


# China calendario d las variedades más relevantes de uva de mesa



阳光玫瑰

Shine Muscat



克瑞森

Crimson



巨峰

Kyoho



夏黑

Summer Black



红提

Red Globe





## Table Grape Harvest and Key Varieties in China

In China, table grape harvesting occurs progressively from south to north and from east to west, following regional climatic patterns.

The leading variety is **Shine Muscat**, followed by **Crimson Seedless, Kyoho, Summer Black Seedless** (also known as **Summer Royal**), and **Red Globe**. The **cultivated area of Shine Muscat** has expanded rapidly in recent years, reflecting its growing market demand and high commercial value.

Thanks to significant improvements in **post-harvest handling technologies**, particularly **cold chain logistics**, **Shine Muscat grapes** can now be stored and marketed **well into the Chinese New Year (CNY) season**.





*Alongside the distribution of production across Tropical, Mediterranean climates and Storage, the global map of table grape production and trade will also, to some extent, be shaped by geopolitical dynamics.*

*O. Salgado, 2024*



### **Implications for Peru and North Hemisphere countries : Monitoring China's Extended Table Grape Supply**

Peru should continue to monitor China's increasing ability to **extend its domestic grape supply** through late storage varieties (e.g., in **Xinjiang** and **Shaanxi**), **double pruning techniques** (notably in **Yunnan**), and improved **cold storage systems** that allow grapes to be marketed in **January, February**, and in some cases even into **early March**.

In **Yunnan**, the **first harvest** occurs from **mid- to late March**, with early fruit grown under **greenhouse conditions**—not just plastic tunnels, but increasingly advanced structures.

The arrival of **Peruvian Piura grapes** in China coincides with the **Chilean cherry season**, a period when the grape market typically **slows due to high cherry consumption**.

**Shine Muscat grapes** can be stored for **4 to 5 months**, with some lots lasting **nearly 6 months**. Cold storage technology continues to **advance**, further enhancing shelf life and market flexibility.

**China may soon have, if not already, year-round grape availability comparable to that of Brazil and Australia.**

**What sets it apart from Peru...? Its domestic market.**

**Forecast is around 53.000 ha, other sources argue 10 – 15 % of the total surface (855.000 ha total), so can be from 85.000 ha to 120.000 ha.**

*O. Salgado, 2024*



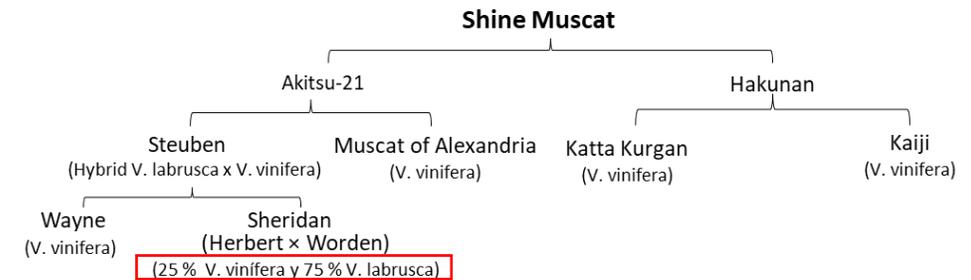
**40 berries**



Shine Muscat, Yunnan  
Southwest of China,  
picking from late April  
to early May.



**Shine Muscat** is a green table grape cultivar developed in Japan in 1988. It is characterized by large yellow-green berries, crisp flesh, thin edible skin, seedlessness (apirenic nature), and low acidity. The cultivar was officially released under the name "Shine Muscat" in 2003 and registered under Japan's Plant Variety and Seed Act in 2006. The breeder (developer) of the Japanese table grape cultivar **Shine Muscat** is the **National Institute of Fruit Tree Science (NIFTS)**, which is part of Japan's **National Agriculture and Food Research Organization (NARO)**. Specifically, the cultivar was created by a grape-breeding team led by **Masahiko Yamada**, alongside colleagues including Yamane, Sato, Hirakawa, Iwanami and others





May 5<sup>th</sup>, 2020





# India

**“India is the only Northern Hemisphere country that produces and exports table grapes during the same period as Southern Hemisphere producing countries”**





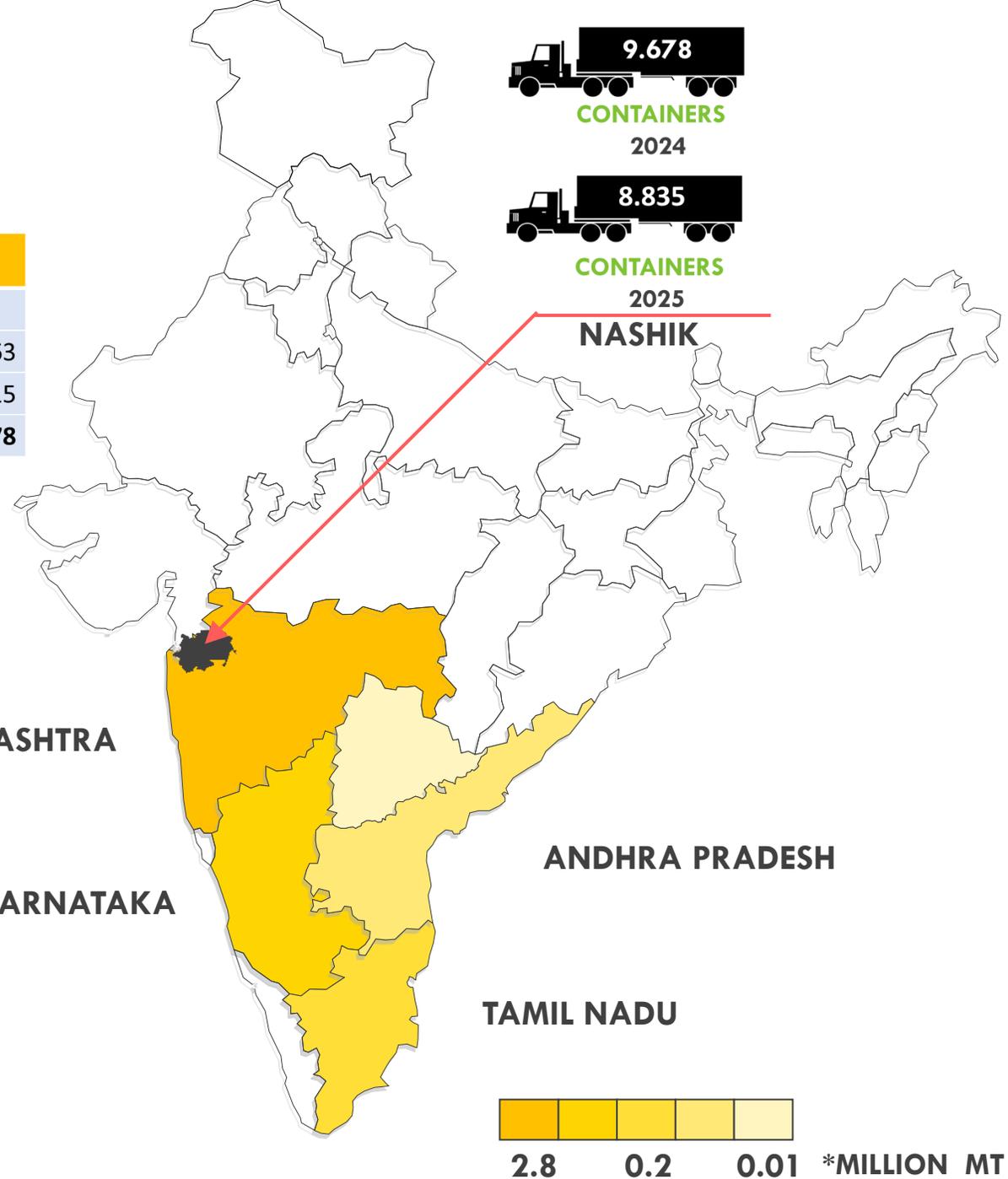
## Registered Plots season 2024 – 25 India Table grape 11 / 05 / 2025

Estate of	Renewed	New plots	Total
Maharashtra	35.824	6.839	42.663
Karnataka	14	1	15
<b>Total</b>	<b>35.838</b>	<b>6.840</b>	<b>42.678</b>

42.678 Plots almost each plot one growers and average 1 to 1,5 ha

According to the USDA, approximately **142,000 hectares** were planted with table grapes for fresh consumption as of 2023.

In 2024, India had approximately **175,930 hectares** dedicated to table grape cultivation for fresh consumption, based on estimates from the Second Advance of the 2023–24 Agricultural Year, provided by the Agricultural and Processed Food Products Export Development Authority (APEDA 2023/24).





# Season 2025: 42.673 Registered plots for Export

Date : 28/03/2025

## MIS Report - 2024-2025

Summary of registered plots			
State	Renewed	New	Total
<a href="#">Maharashtra</a>	35822	6836	42658
<a href="#">Karnataka</a>	14	1	15
<b>Total</b>	<b>35836</b>	<b>6837</b>	<b>42673</b>

Summary of Export Containers wise as on -28/3/2024 vis a vis 28/3/2025(dd/mm/yyyy)										
Season	MAHARASHTRA		KARNATAKA		ANDHRA PRADESH		TELANGANA		TOTAL	
	No.of Container(s)	Qty.(In MT)								
2024-2025	4769	64084,685	0	0,000	0	0,000	0	0,000	4769	64084,685
2023-2024	7297	98319,548	0	0,000	0	0,000	0	0,000	7297	98319,548

\*Note:Due to issuance of PSC from some other location the Export Summary may vary from State wise Report

Summary of export - Country wise		
Country Name	Qty. (In MT)	No. of Containers
The Netherlands	61636,307	4598
Poland	1041,768	62
United Kingdom	468,134	37
Germany	372,964	29
Norway	221,000	17
Belgium	126,410	10
Romania	43,902	3
Switzerland	41,912	3
Denmark	37,960	3
Spain	26,000	2
Ireland	25,480	2
Lithuania	16,848	1
France	13,000	1
Sweden	13,000	1
<b>Total</b>	<b>64084,685</b>	<b>4769</b>





# Season 2026

Date : 05/02/2026

## MIS Report - 2025-2026

Summary of registered plots			
State	Renewed	New	Total
<a href="#">Maharashtra</a>	26030	4579	30609
<a href="#">Karnataka</a>	9	0	9
<b>Total</b>	<b>26039</b>	<b>4579</b>	<b>30618</b>

Summary of Export Containers wise as on -5/2/2025 vis a vis 5/2/2026(dd/mm/yyyy)										
	MAHARASHTRA		KARNATAKA		ANDHRA PRADESH		TELANGANA		TOTAL	
Season	No.of Container(s)	Qty.(In MT)								
2025-2026	377	5009.111	0	0.000	0	0.000	0	0.000	377	5009.111
2024-2025	6165	83146.071	0	0.000	0	0.000	0	0.000	6165	83146.071

**\*Note:Due to issuance of PSC from some other location the Export Summary may vary from State wise Report**

Summary of export - Country wise		
Country Name	Qty. (In MT)	No. of Containers
The Netherlands	4776.131	359
Germany	181.500	14
Select Country	38.480	3
Belgium	13.000	1
<b>Total</b>	<b>5009.111</b>	<b>377</b>

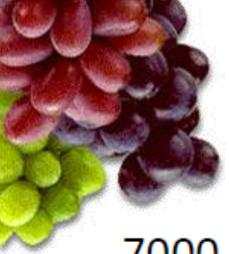
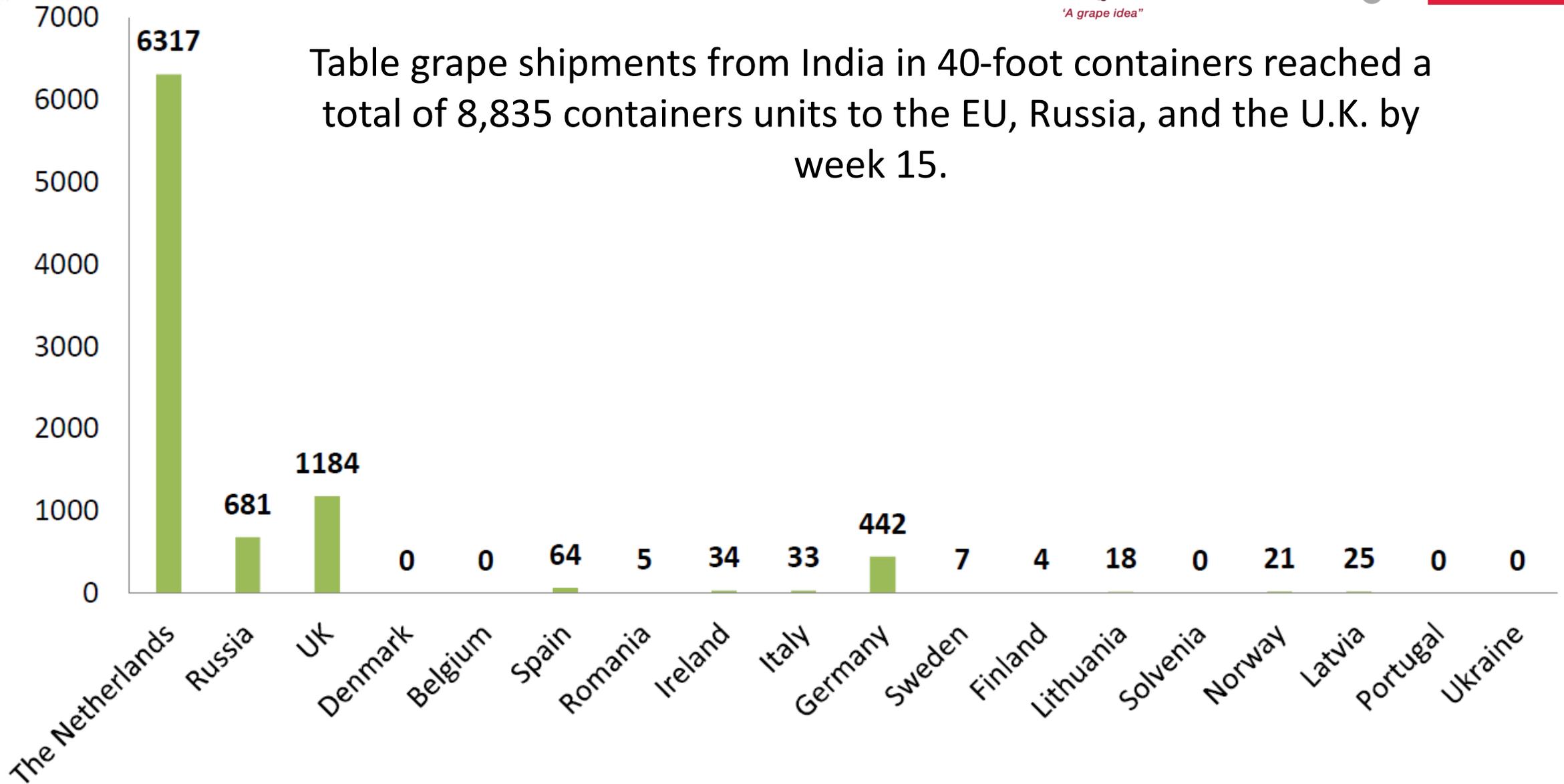
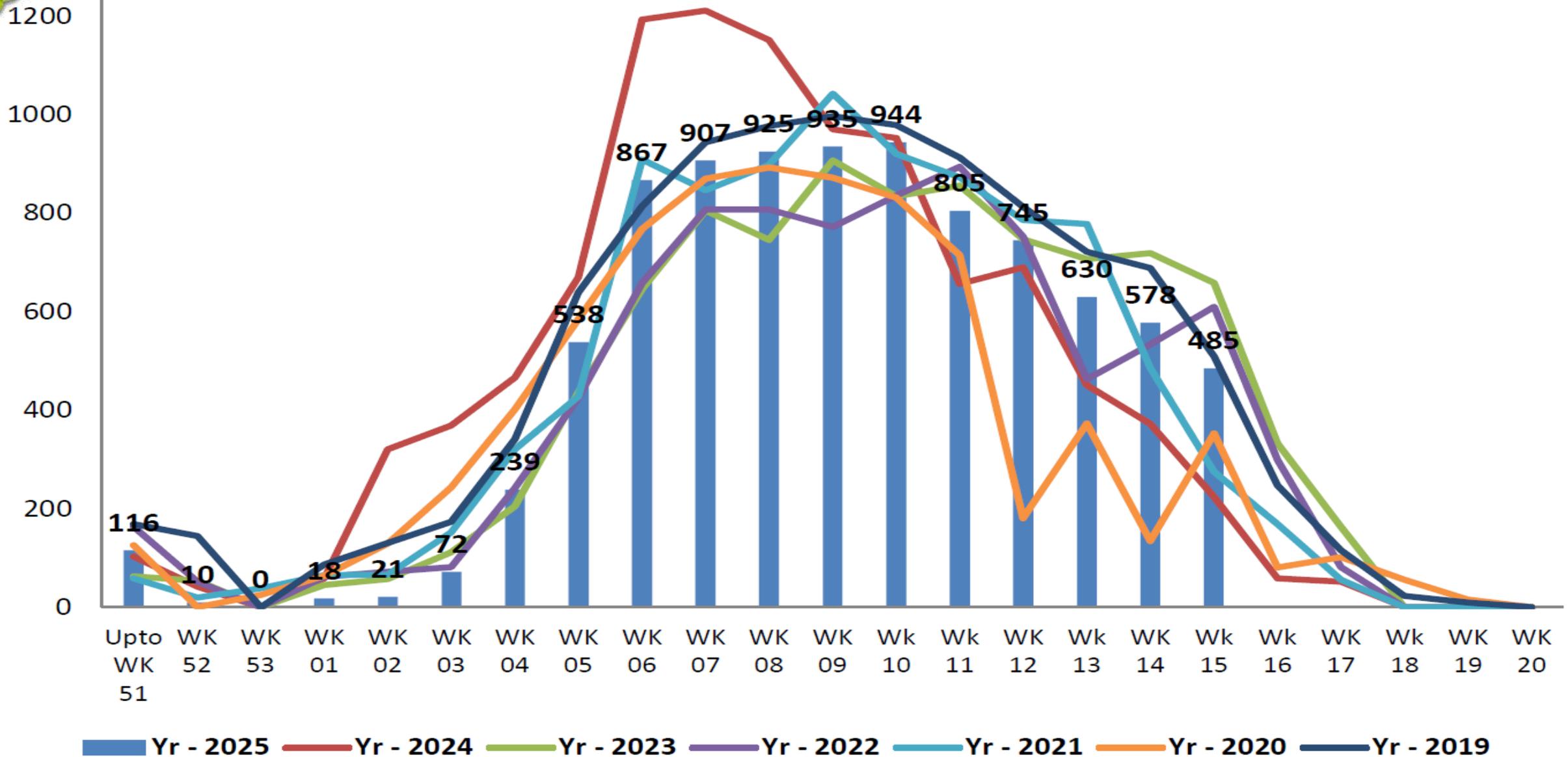


Table grape shipments from India in 40-foot containers reached a total of 8,835 containers units to the EU, Russia, and the U.K. by week 15.



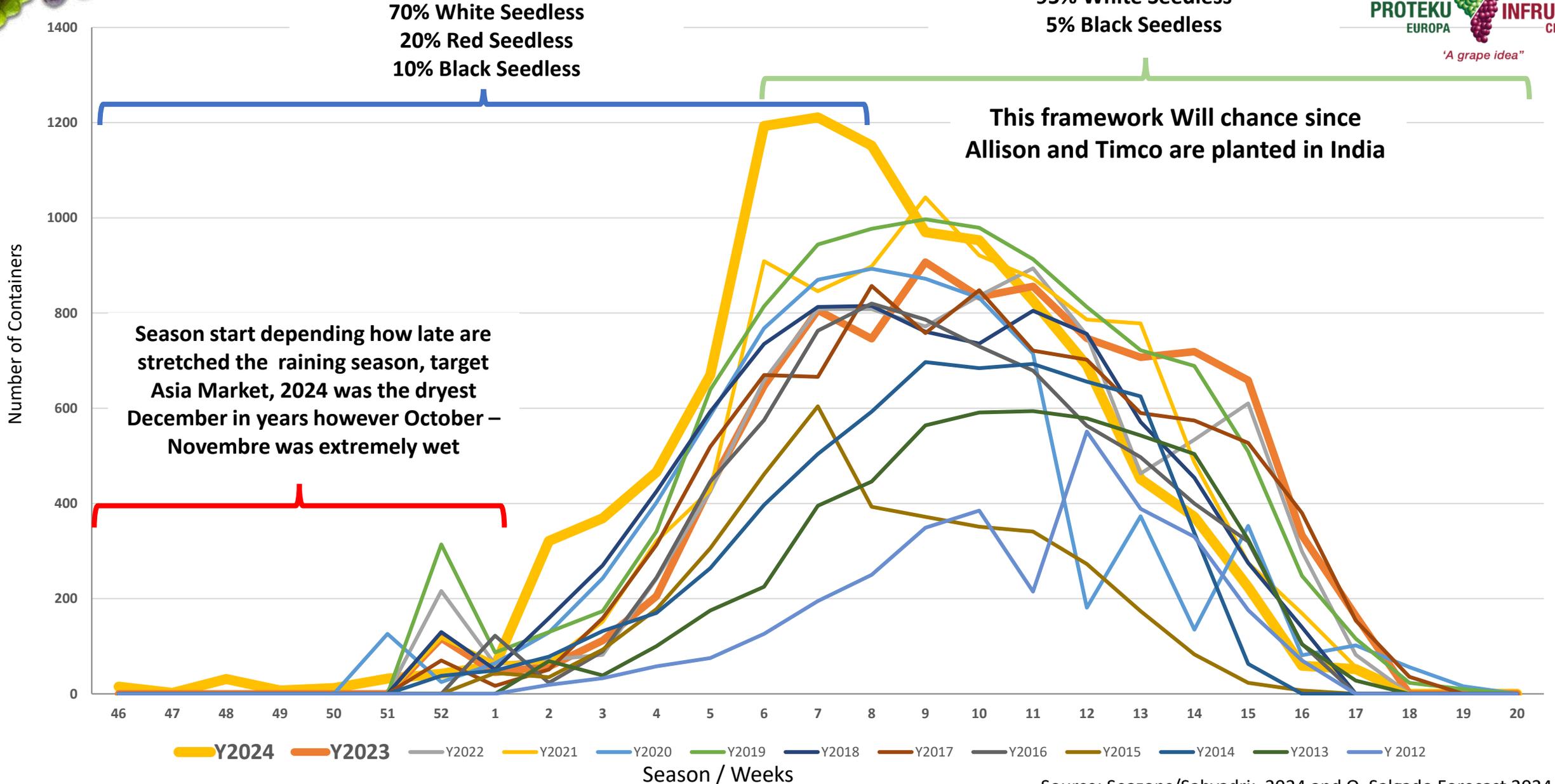
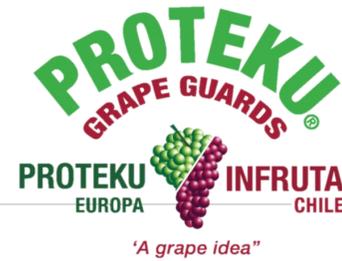


By week 15 of the 2025 season, India had shipped a total of 8,835 40-foot containers of table grapes to the EU, Russia, and the UK — equivalent to approximately 30 million 8.2-kilogram boxes.



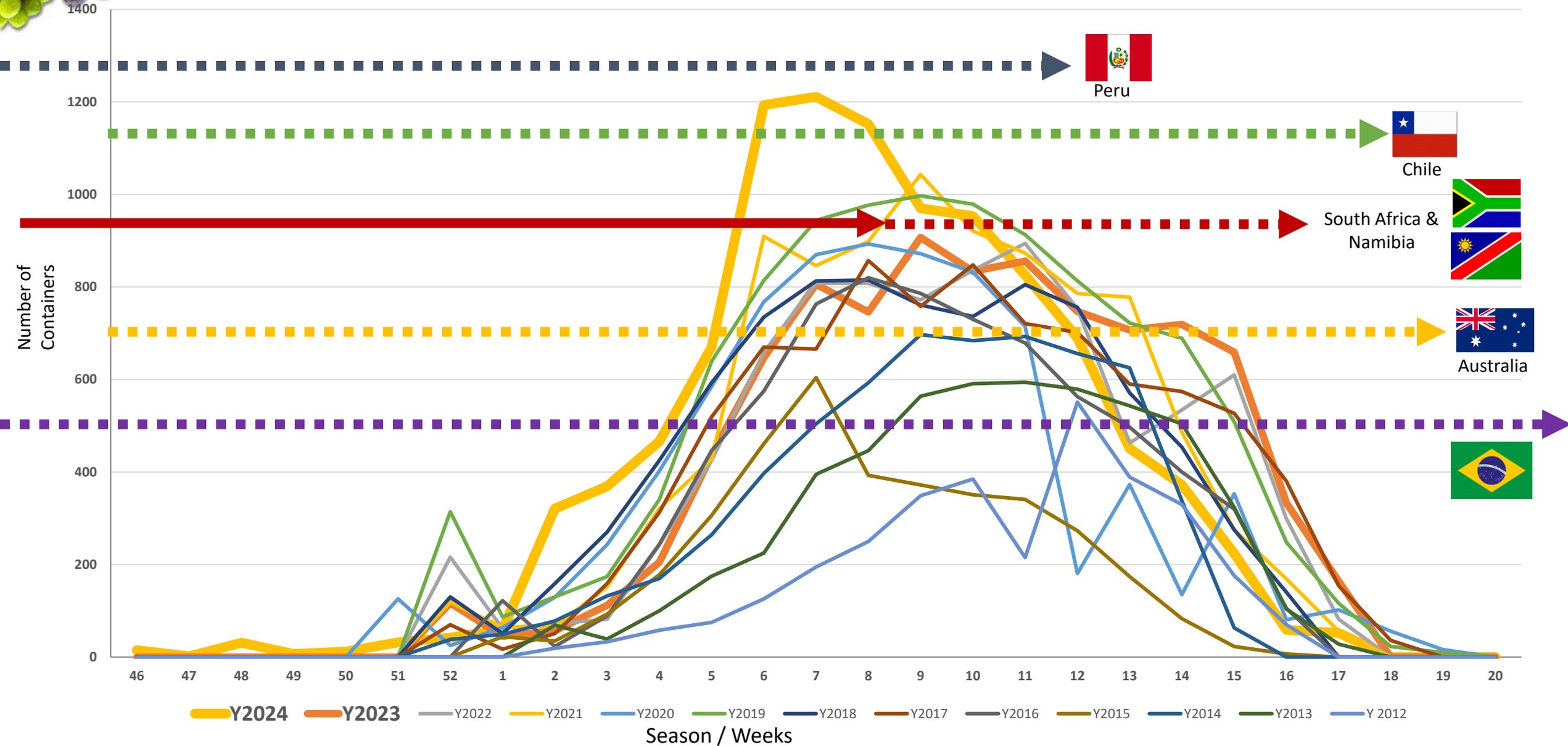


# Weekly Indian Grape EU Departures in 40-foot Reefer containers





# Weekly Indian Grape EU Departures comparing with other South Hemisphere export season



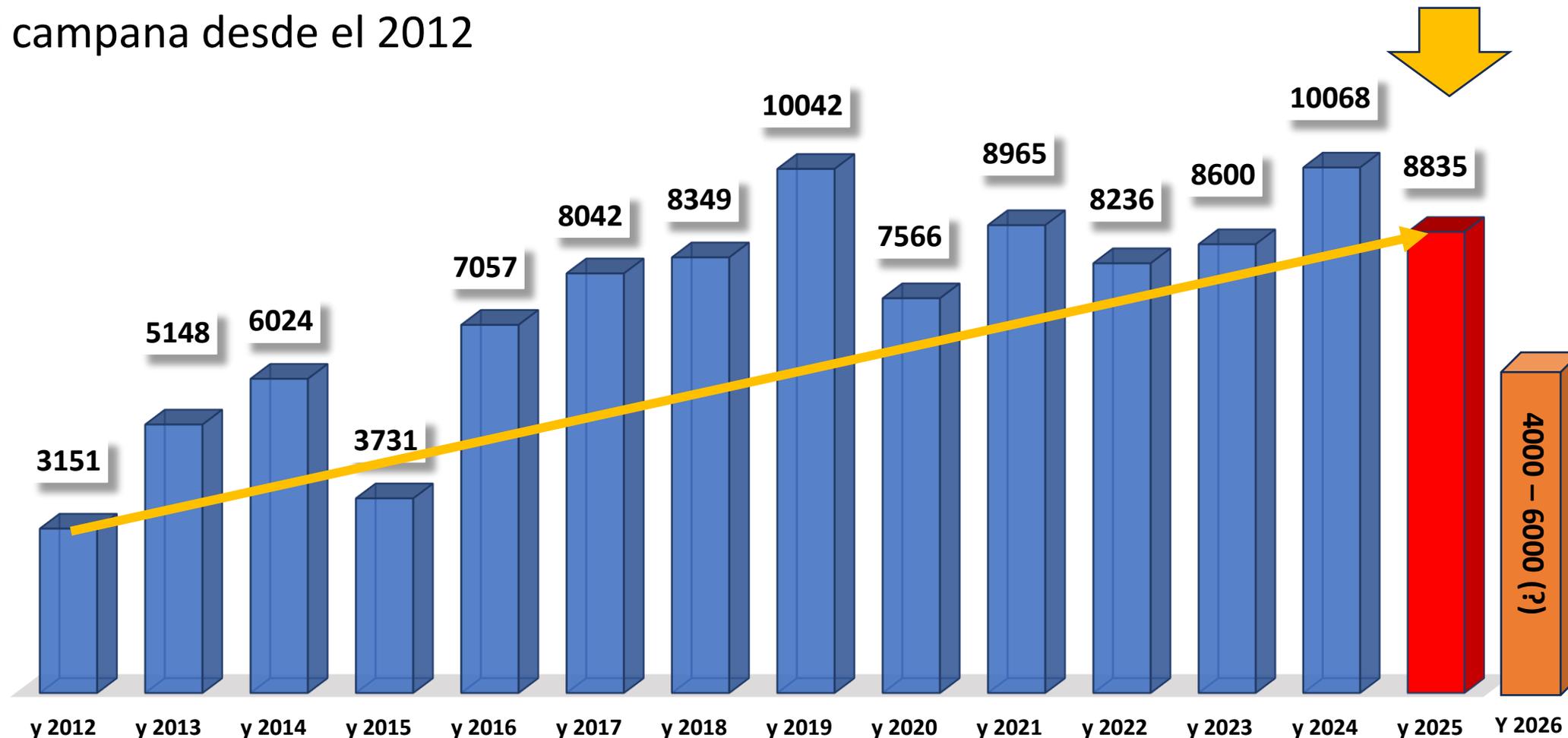
Source: O. Salgado compiled after many years and verbal communication from growers and exporters. 2016 - 2025





# Numero de Contenedores exportados por India a EU, Rusia y UK por campana desde el 2012

Conflictos en el canal de Suez y lluvias  
Octubre / Noviembre 2024





Rainfall in Nashik, India, through the final weekend of October 19, 2024, affected grapes harvested from early December through week 6 of 2025.

# MAIN GRAPE EXPORTERS FROM INDIA 2024

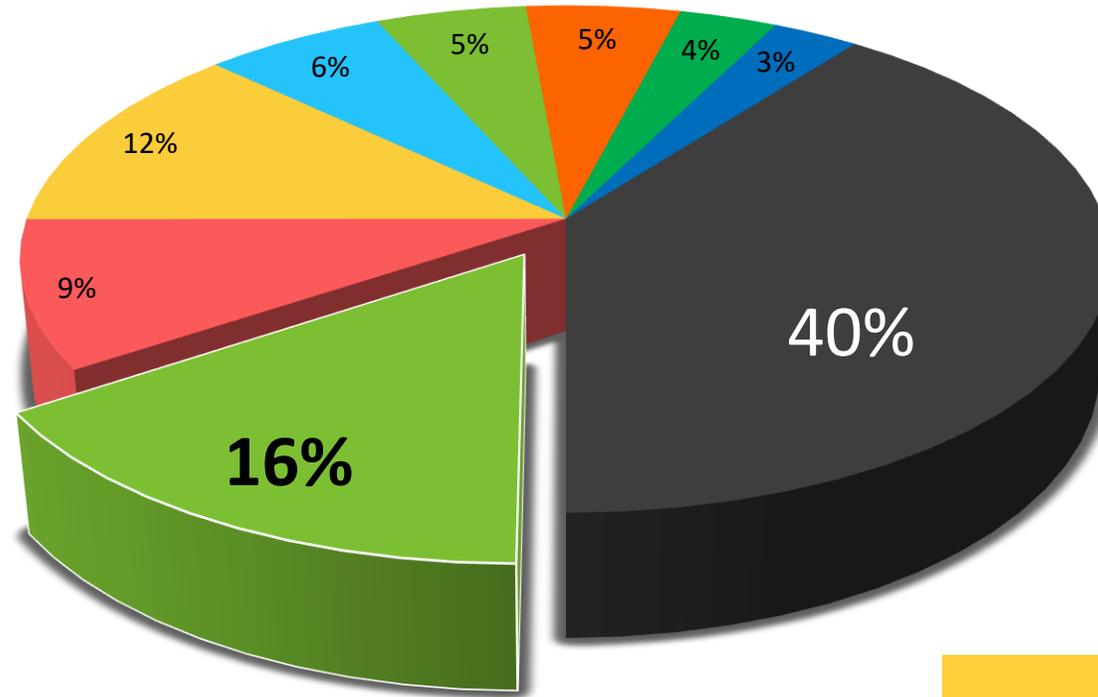


**8**  
**ORGANIZATIONS**

**60%**  
**EXPORT**

**46400**  
**FARMERS**

- Sahyadri Farms
- PC Food Pvt Ltd
- Indyglobal Ventures & Panacea Exim
- Monsoon Green Forth Farms & Projects Pvt Ltd
- Kalya Foods Pvt Ltd
- Mahindra Agri Solutions
- Freshtrop Fruits Ltd
- Euro Fruit Pvt Ltd
- Other



**@200**  
**TOTAL GRAPE EXPORTERS**

**207**  
**CERTIFIED PACKHOUSES**

NOTE: NEAR ACCURATE INTERPRETATION FROM SAHYADRI FARMS'S INTERNAL STATISTICS RESEARCH



# Grape Production Cycle



**Rootstock Plantation**

April – June



**Grafting**

Aug. – Sept.



**Foundation Pruning**

Jan. – Feb.



**Shaping the plant**

March – Oct.



**Fruit Pruning**

Sept. – Nov.



**Fruit Harvest**

Dec. – Mar.



**Foundation Pruning**

April – May



**Fruit Pruning**

Sept. – Nov.



**Fruit Harvest**

Dec. – Mar.

Potential use of CCC or Cycocel®  
chlormequat chloride



Allison Llegada a inicios de Mayo a UK con 70 días desde Cosecha

2025



Timco Llegada a inicios de Mayo a UK con 60 días desde Cosecha



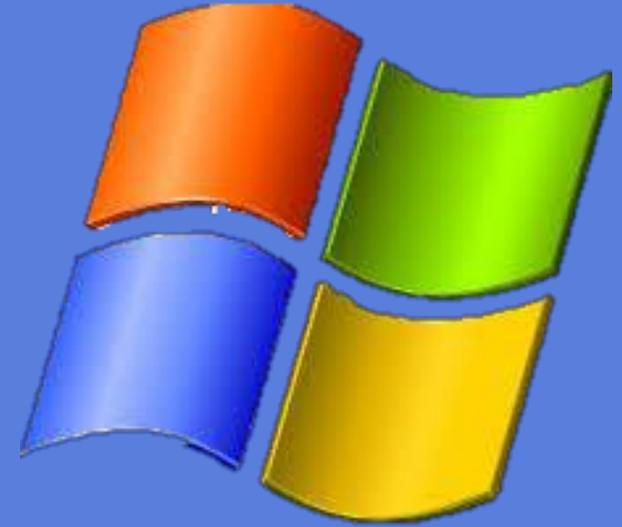
**Indian Crimson**  
Harvested 17/03/2025  
51 days old



**Indian Allison**  
Harvested 20/02/2025  
77 days old



**Indian Timco**  
Harvested 05/03/2025  
64 days old



Microsoft®

Windows® xp

Windows are shutting down.....

## Entender los estructural y lo coyuntural de cada mercado o de mi negocio

**Coyuntura** es la combinación de factores y circunstancias que caracterizan un momento determinado, especialmente en lo económico, político o social.

**Estructura** es la forma en que se organizan y relacionan las partes de un todo para funcionar de manera coherente. no es necesariamente permanente, pero sí más estable y duradera que la coyuntura. Puede cambiar, aunque suele hacerlo de forma lenta y a largo plazo, a diferencia de la coyuntura, que es temporal y cambiante.

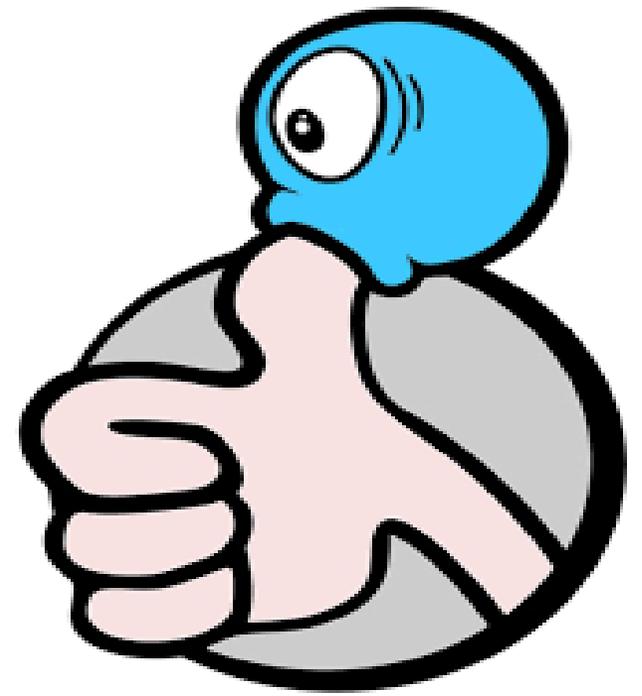
**Chantell Ilbury  
Clem Sunter**

**The Mind of a  
FOX**

Scenario Planning in *Action*

Human &  
Rousseau  
Tiefelberg

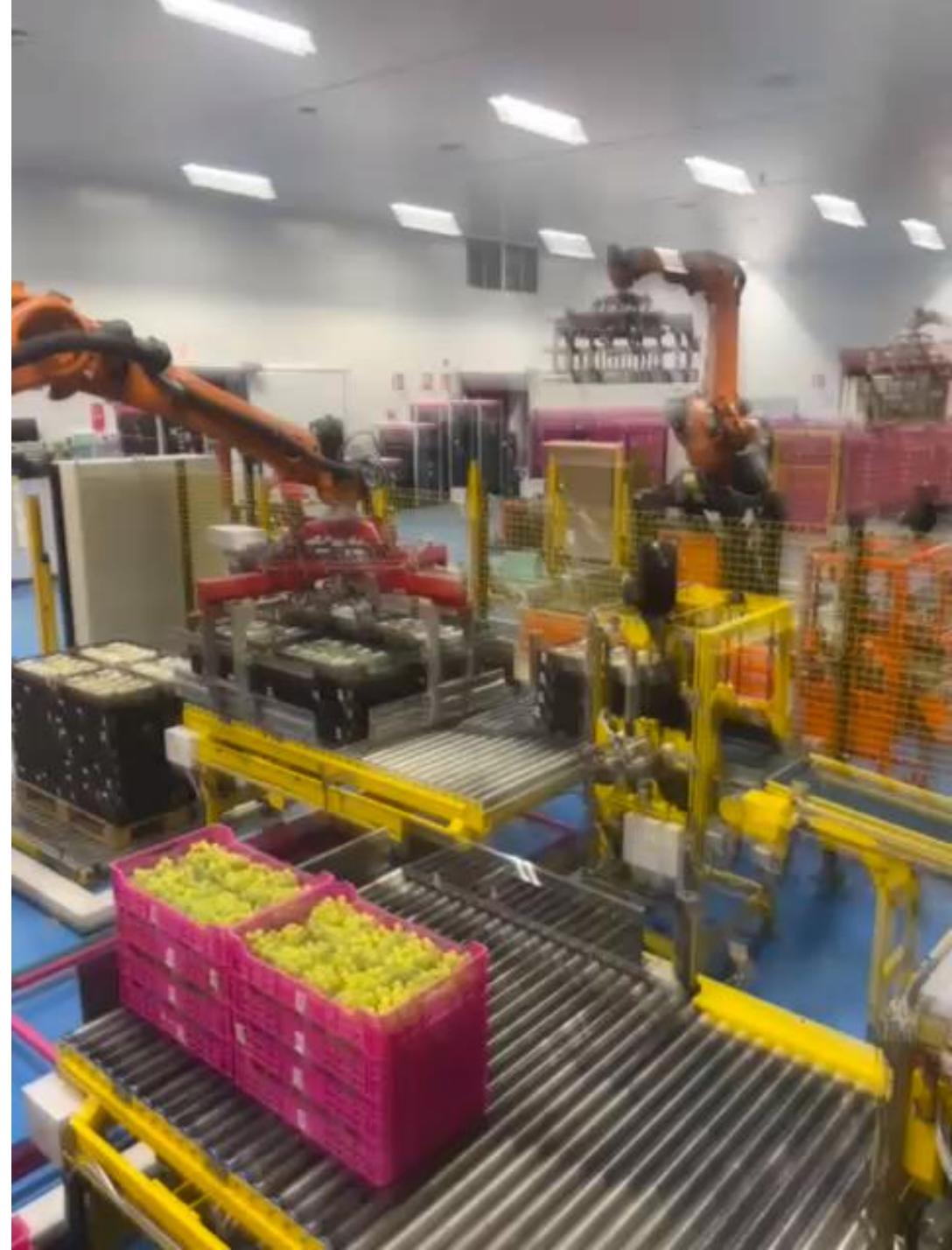
More than  
60 000 sold



**Technology may range from the very simple to the highly sophisticated, yet it must be grounded in science. However, the real secret lies in how to use it.**

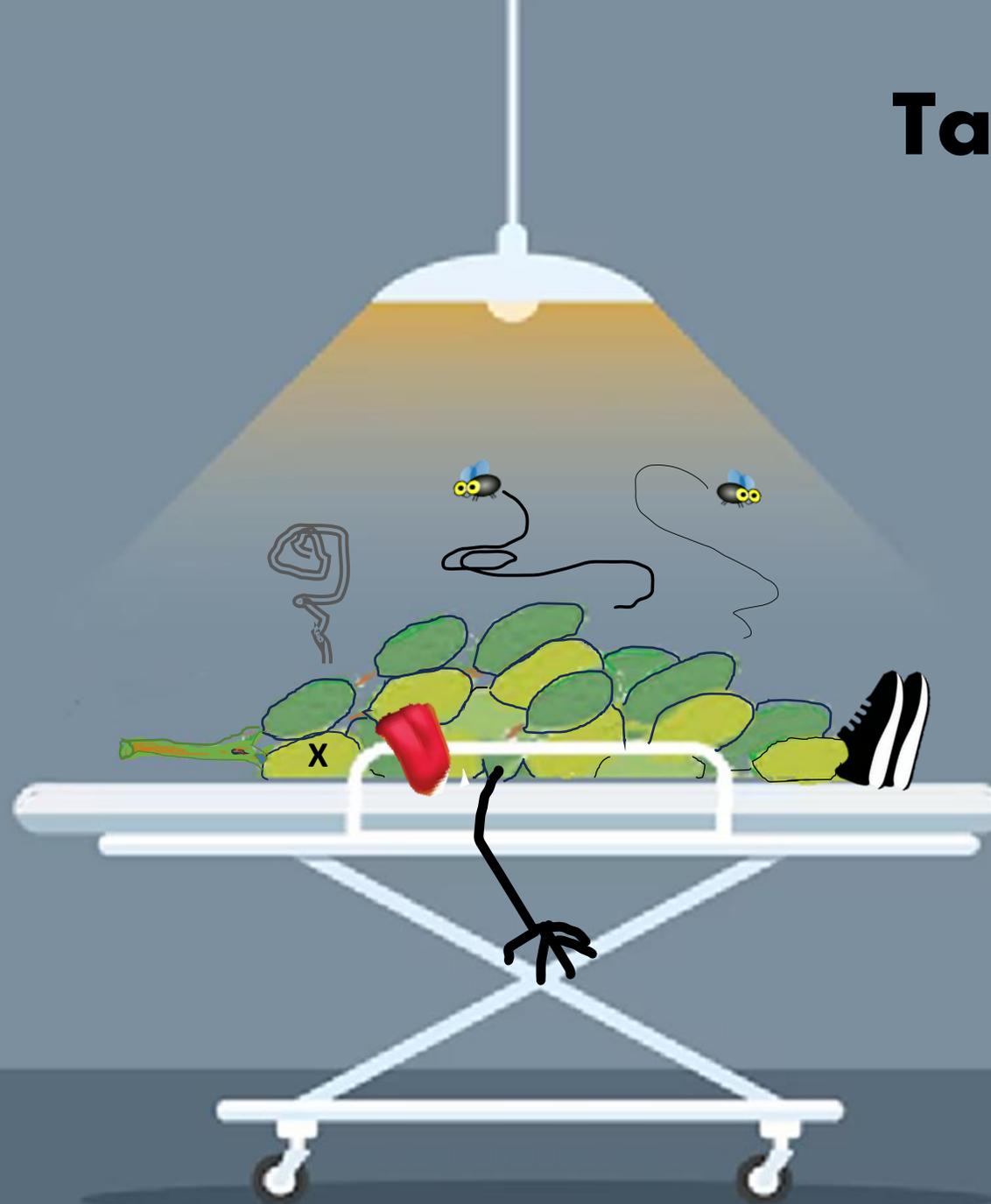








# Tanatología o la Autopsia Uvera





# Quality?



## • **Table Grape Quality,**

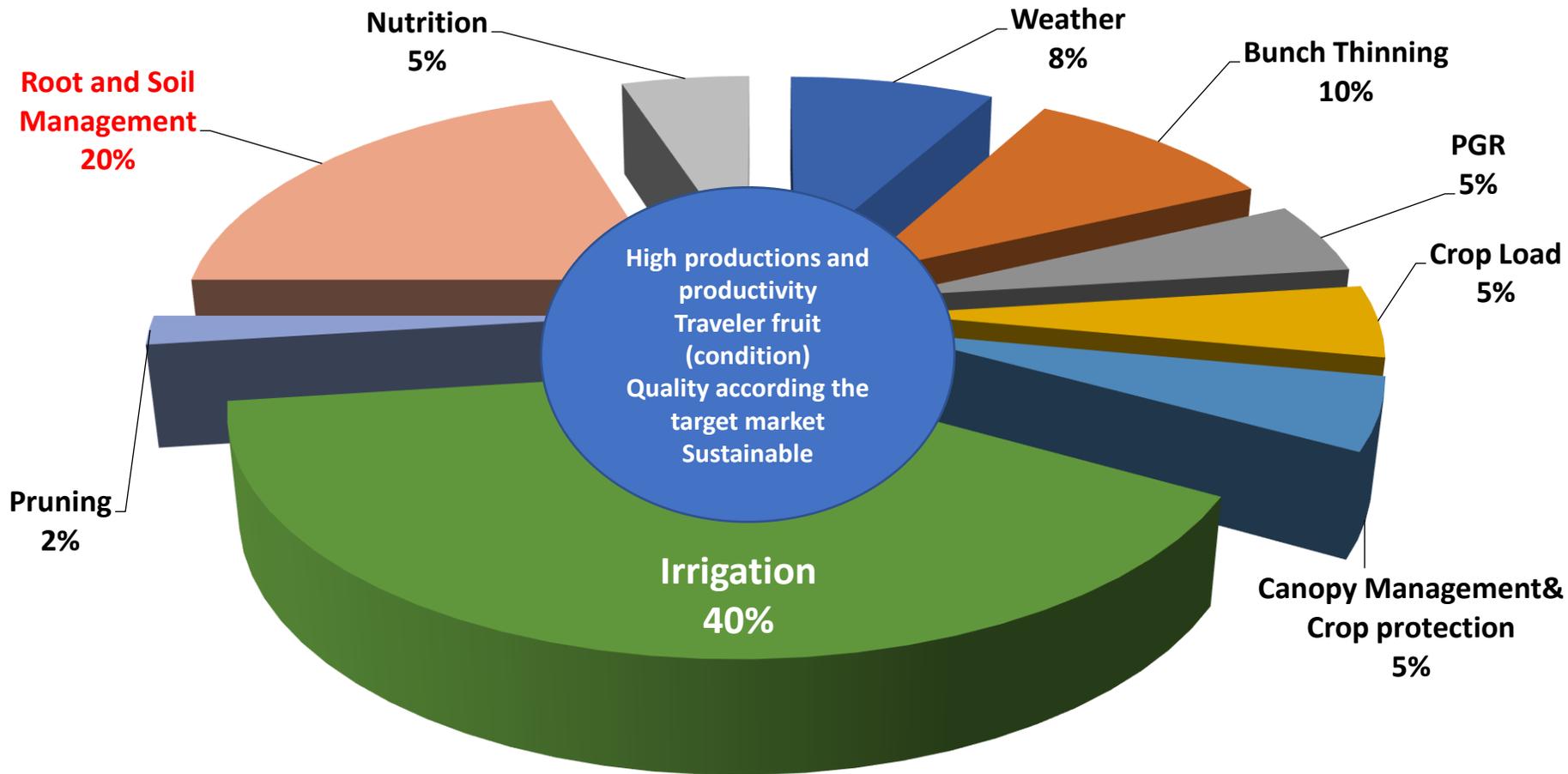
- Factors that do not change in reasonable commercial times of post-harvest with traditional technical management, to the market.
- Determined at the time of harvest and product of agronomic/technical field production management.
- Levels of soluble solids (<sup>o</sup>Brix).
- Total Titratable Acidity Levels (%)
- Cluster Weight
- Berry weight
- Berry length and equatorial diameter
- Crunchiness
- Berry color
- Cluster Conformation

## • **Table Grape Condition,** *'A grape idea...'*

- Dynamic factors that change or evolve at different speeds in reasonable post-harvest commercial times with traditional management, to the markets.
- Associated with the senescence of the fruit and its tissues, influenced by orchard management, pre-harvest, post-harvest culture, design and cold management, design of packaging materials, including internal ones and logistics management.
- Decays
- Internal and external browning
- Pedicellar tear and berry shattering / drop
- Fine, micro and macro cracking / berry split.
- Bleaching
- Dehydration of berries and stem or rachis



# Agronomic Impact of some Techniques in a well manage Export Table Grape production unit

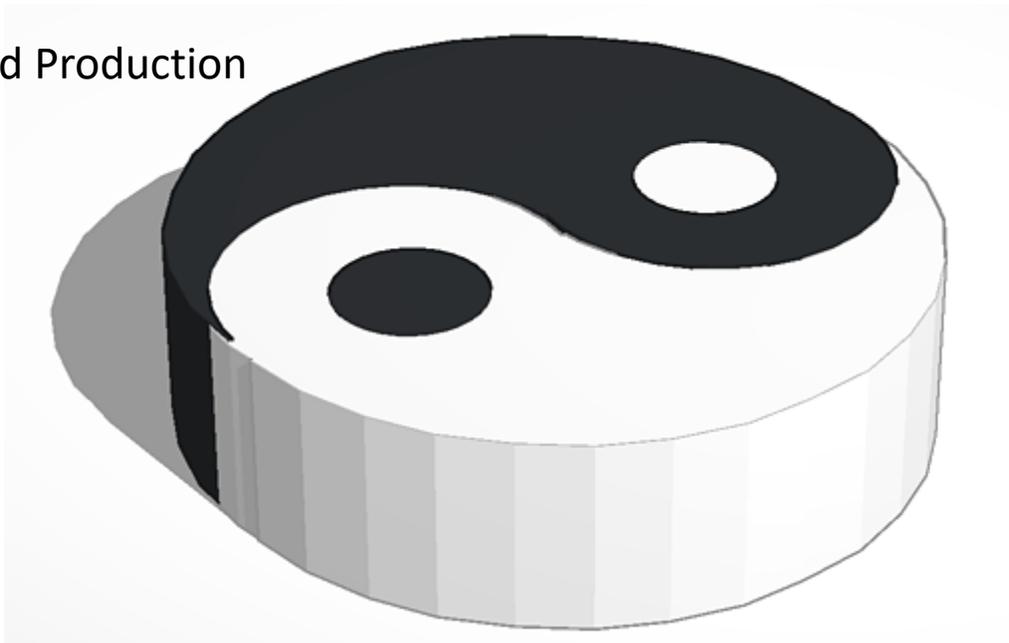




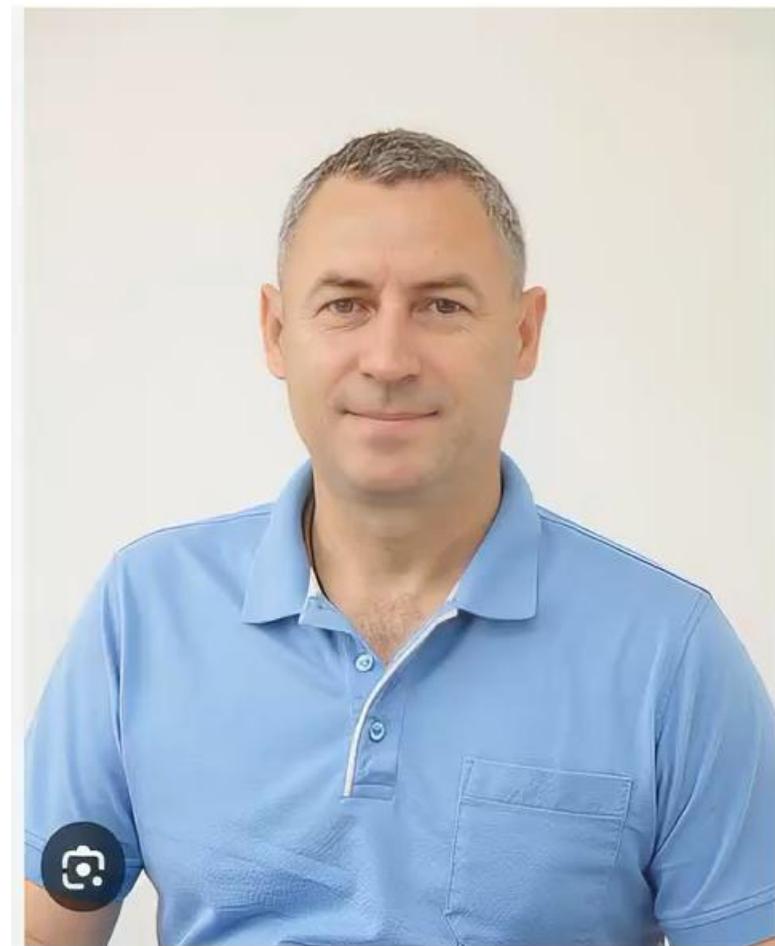
UVASYS

Impact or share between field production and Post harvest in successful arrivals of Table Grape

50% Field Production



50% Pre & Post harvest



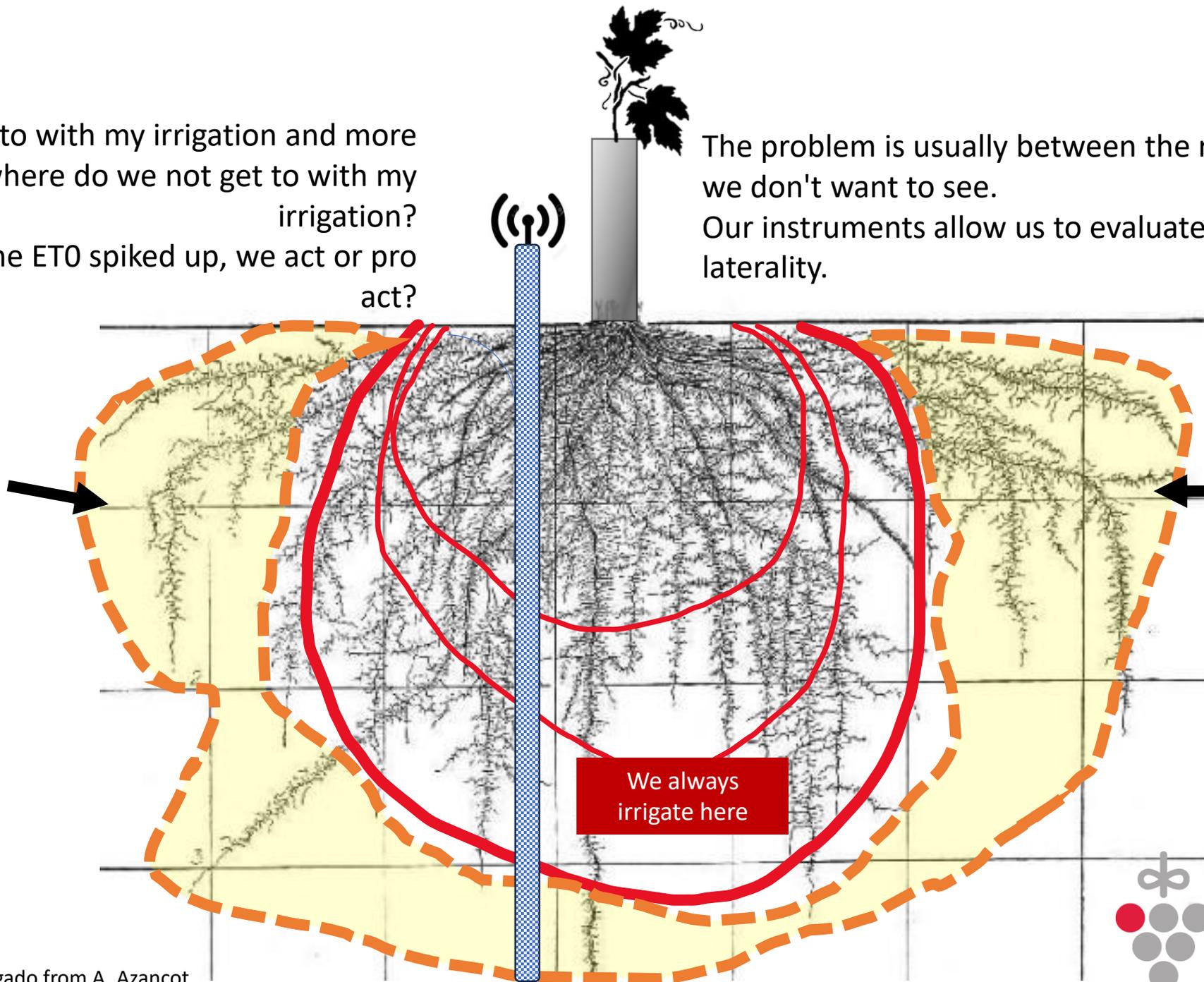


Where do I get to with my irrigation and more importantly, where do we not get to with my irrigation?  
And when did the ETO spiked up, we act or pro act?

The problem is usually between the rows, which we don't want to see.  
Our instruments allow us to evaluate in depth, not laterality.

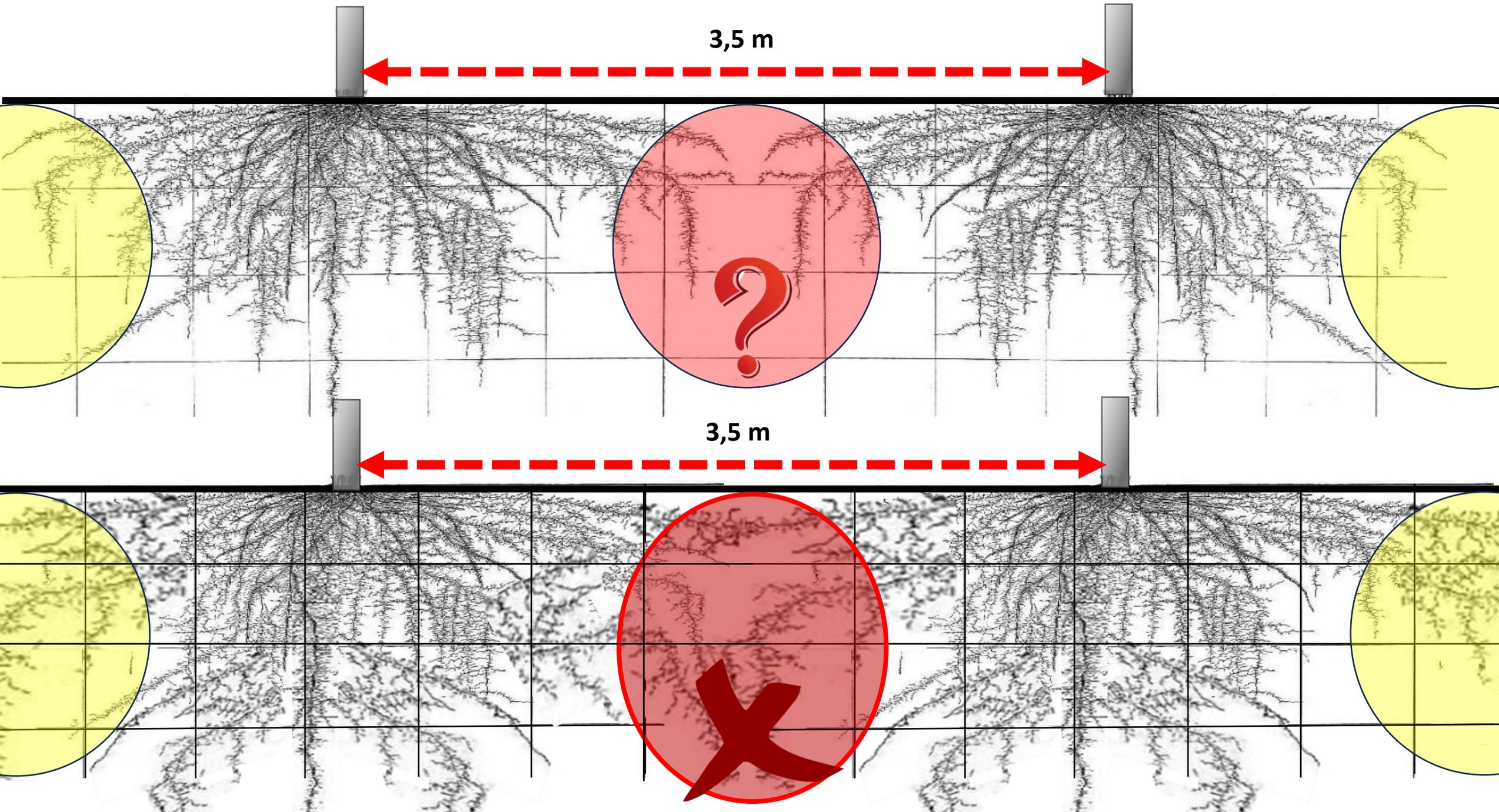
Where do we not irrigate ?

Where do we not irrigate ?



We always irrigate here







**Bajo mi experiencia  
técnica, horas de  
lectura  
y experiencia  
empírica:  
La raíz de la  
Resiliencia de las  
plantas  
está en la  
Raíz**





• **Por qué no se cumplen los Objetivos productivos propuestos si la mayoría de las recomendaciones técnicas son correctas .....iiiiiii**

- Número de yemas /ha
- Número de brotes/ha
- Número de racimos /planta
- Número bayas/racimos
  - Momentos de arreglo
- Reguladores de Crecimiento
- Programa Fitosanitario y Maquinaria
- Manejos de Follaje e Iluminación
- Riego
- Nutrición
- Parámetros de cosecha

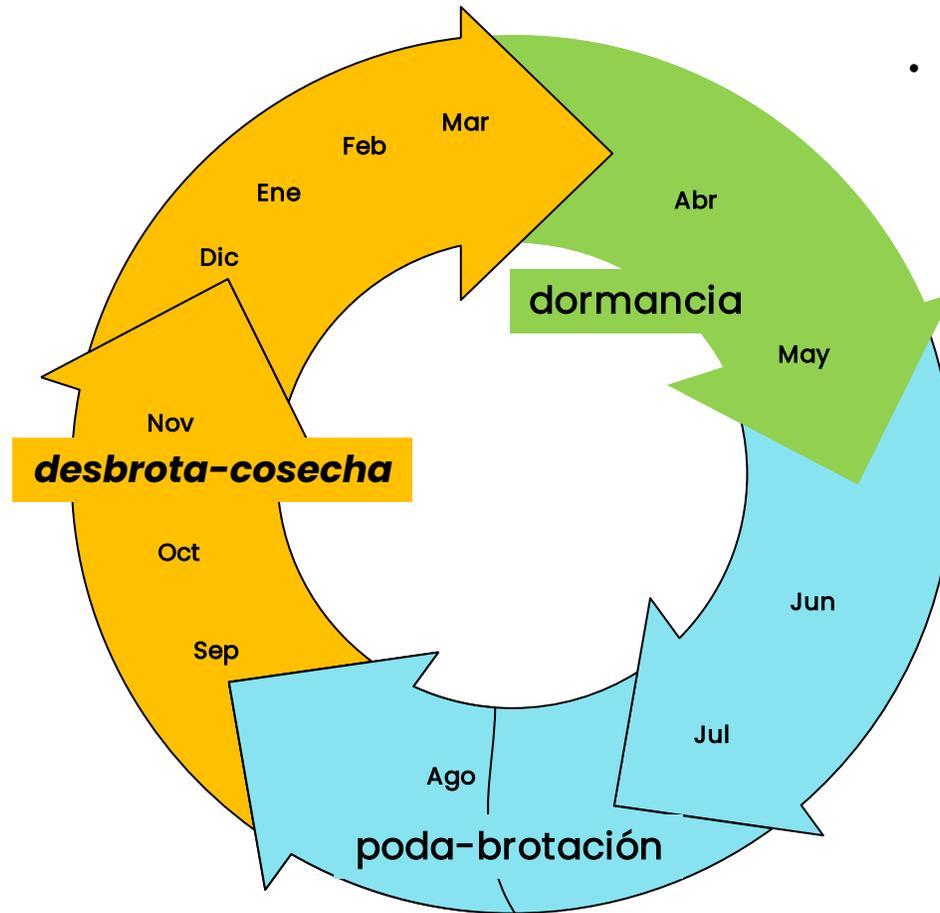




# CICLO MEJORA CONTINUA EN UVA DE MESA

## 5. CONTROL DE GESTION

- Ecuación Productiva
- Fenología e indicadores
- % Cumplimiento de programas
- Carta Gantt



## 4. IMPLEMENTAR SOLUCIONES

- Planificación de las soluciones en 5 áreas del Diagnóstico

## 1. DIAGNOSTICO-PUNTOS CRITICOS

- Identificar oportunidades de mejora en 5 áreas
  - Riego
  - Nutrición
  - Logística y Labores
  - Clima
  - Fitosanitario y reguladores

## 2. EVALUACION ORGANIGRAMA

- Descripción de cargos y Áreas de trabajo
- Procesos y actividades
- Capacitación

## 3. ANALISIS DE PROBLEMATICAS

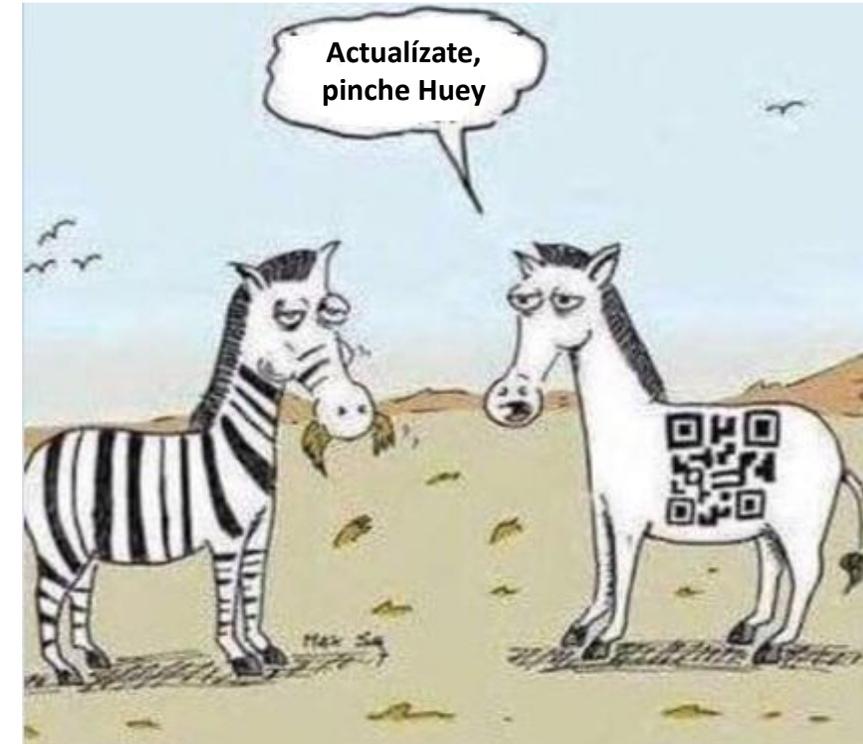
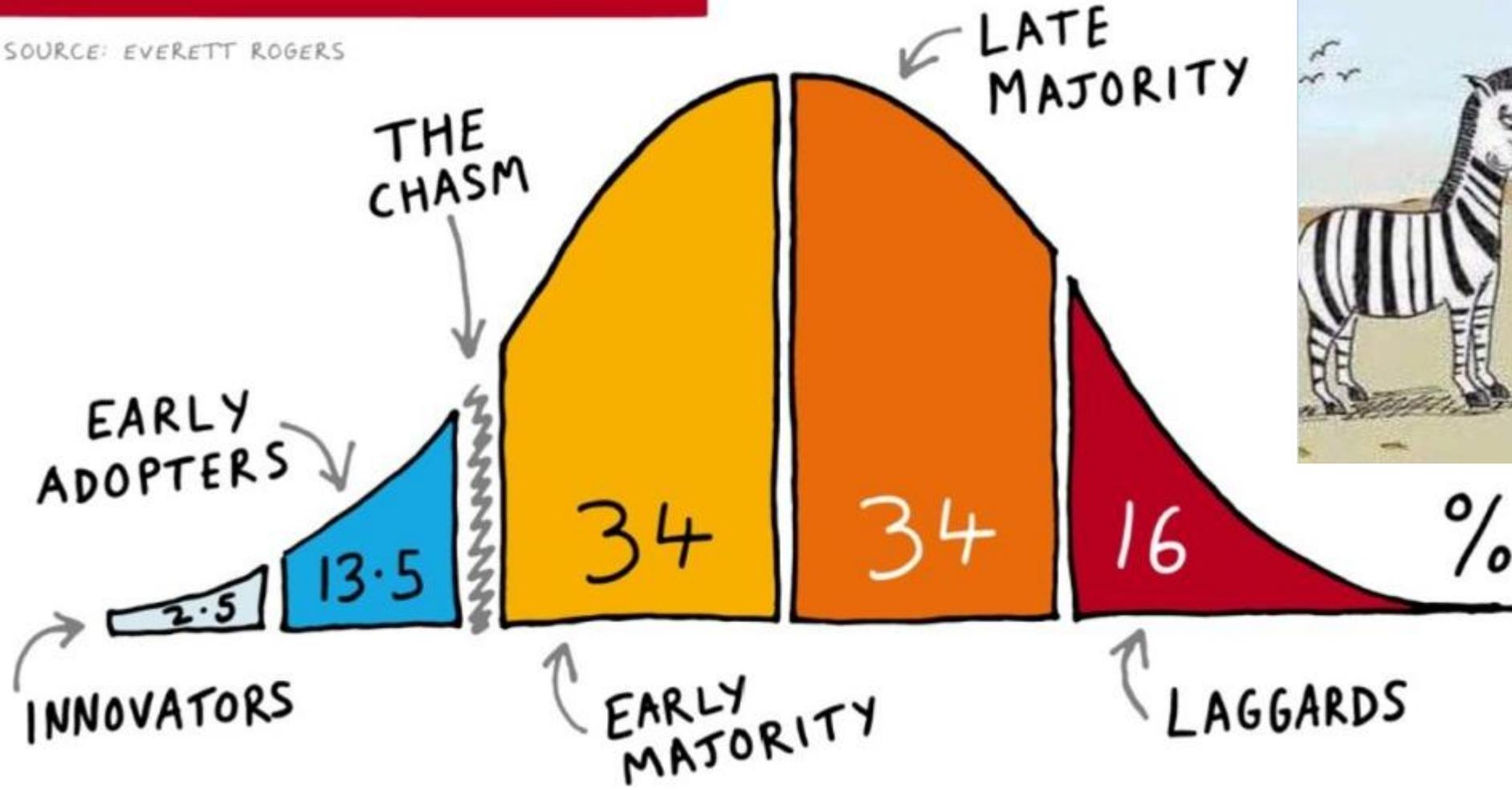
- Cuál es el problema?
- Cómo se soluciona?
- Quién lo soluciona?
- Cuándo se soluciona?

**Everett Rogers' Diffusion of Innovations theory 1962**

<https://www.marketcalls.in/market-profile/diffusion-innovation-theory-and-market-profile.html>

**DIFFUSION OF INNOVATION**

SOURCE: EVERETT ROGERS



Ctrl + C

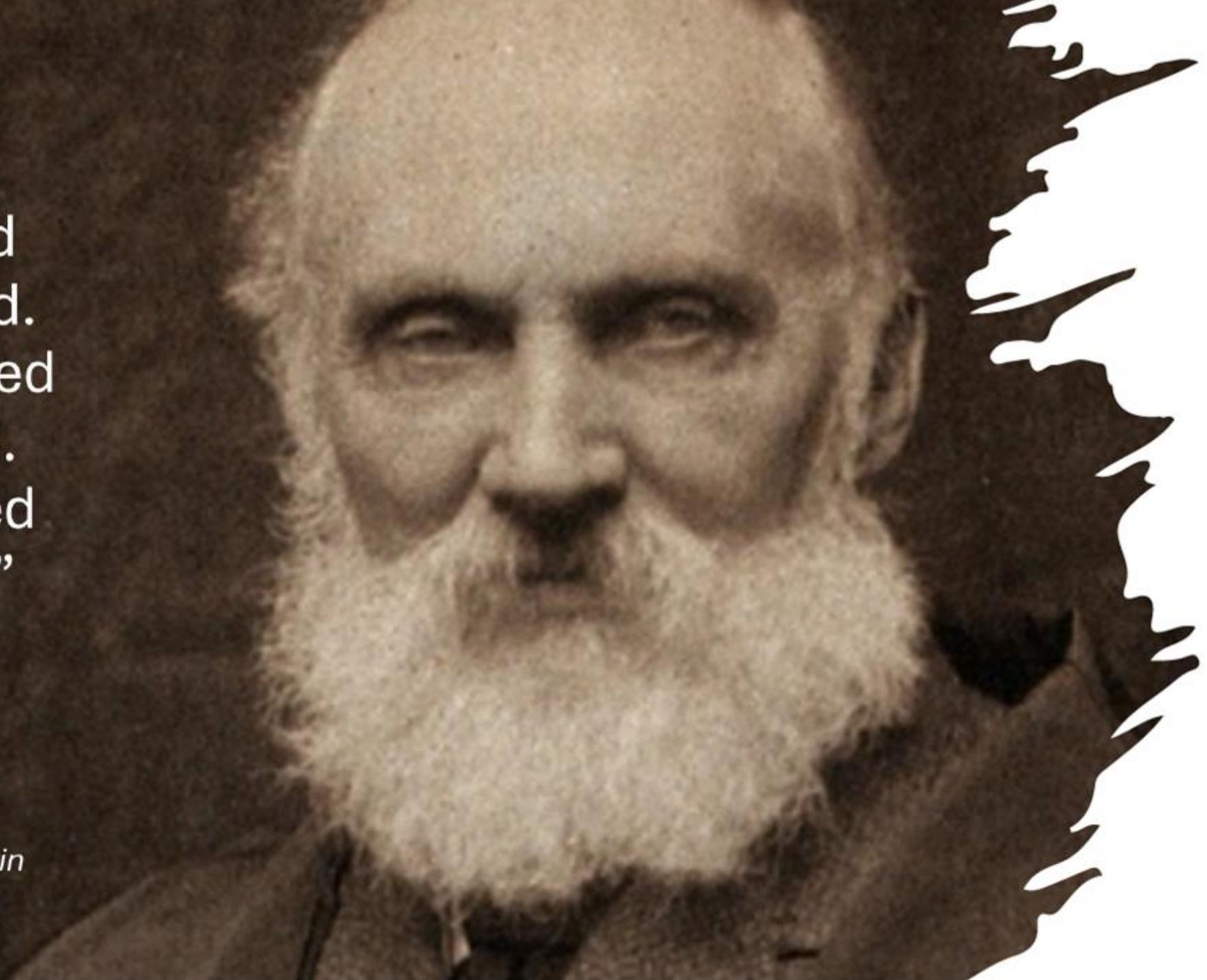
Ctrl + V

**Solo a partir de un huerto uniforme se puede aplicar realmente la tecnología**



“What is not defined  
cannot be measured.  
What is not measured  
cannot be improved.  
What is not improved  
is always degraded.”

*William Thompson 1<sup>st</sup> Baron Kelvin*  
1824 - 1907



**PROTEKU**  
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EUROPA CHILE



*'A grape idea'*



**UVASYS**



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EUROPA CHILE  
*'A grape idea'*



 **UVASYS**





"A grape idea"





Pic: by O.Salgado 2017, with authorization of the personnel



All packers right – hand



Flow of the work from left to right

South Africa:  
Easy or make it difficult?  
With this operation are an  
increase of shattering, bruising,  
pedicel cap- stem tear, removal of  
the bloom or natural wax, wounds  
and a slow operation. **Shattering  
in Sweet Globe and Cotton  
Candy.....?**





Who will be the winner?

Volume?

Quality and condition?

Varietal offering?

Service level?

Market positioning?

Highly productive and efficient units, cost efficiency... what else?

Continuous improvement and Quality Management?

**Professional agricultural management:** technical expertise, quality-driven production with a market-oriented and business-focused approach.

Viability versus (or along with) sustainability – selling a product.

Timely and high-quality information – how effective is the decision-making process?





# Oportunidad para algunos, el fin para muchos. ¿Darwinismo?

- **Consolidación** de la producción (menos productores, pero cada vez más grandes).
- Entrada de **fondos de inversión** en el negocio agrícola.
- **Doble embudo comercial**: cada vez menos plataformas de compra y consolidación de plataformas de ventas para un mayor número de consumidores.
- **Clase media** en riesgo y aumento en la segmentación del consumidor.
- Suministro constante durante las **52 semanas.**
- Aumento de los **costos de producción, falta o escasez de trabajadores. Migración del campo a las ciudades.**
- **Aumento de los costos** logísticos y fragilidad o riesgos logísticos.
- **Incertidumbre climática** o incertidumbre hídrica.
- **Incertidumbre política.**
- **Regulaciones** irracionales y excesivas.
- **Barreras comerciales** fitosanitarias o paraarancelarias de entrada.
- **Alta presión/competencia** contra las industrias tradicionales. por parte de los nuevos competidores.



# Apresuremos más conclusiones

Ante los escenarios mencionados, nos vemos obligados a **aplicar tecnología de vanguardia, simple y básica**, lo queramos admitir o no: el mercado está cambiando rápidamente, las variedades están cambiando, los entornos de producción y el clima están cambiando de alguna manera, el comportamiento de los consumidores está evolucionando, y nosotros pretendemos seguir haciendo lo mismo para siempre.....**hoy hay que salir a vender uva, lección para Peru, se acabó la fila de compradores rogando por uva.**





**Razón por la  
extinción de algunas  
especies.....**



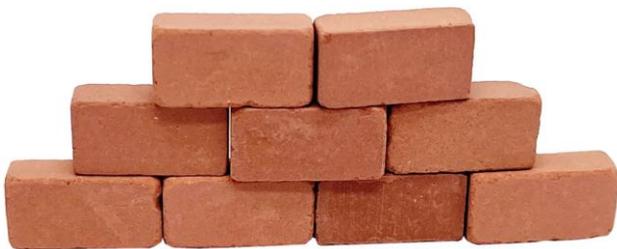
## Table Grape

### "The Painter's Dilemma"

A work of art — but one that  
cannot be replicated.

Yes, we are artisans, perhaps  
craft makers — no doubt about  
it — but we must produce at  
scale.

Table grapes must be like  
bricks: uniform, consistent, and  
reliable.





No se sientan acomodados, todos tenemos el derecho de estar en el negocio, pero nadie tiene garantizado permanecer en él. Recuerden que nuestro negocio está cambiando muy rápidamente — y lo que cambia incluso más rápido que nuestro negocio es la velocidad del cambio en sí... change itself...”

*Coco Salgado 2016*





***“The wise gain more advantage from their enemies than fools do from their friends.”***

*Benjamín Franklin*

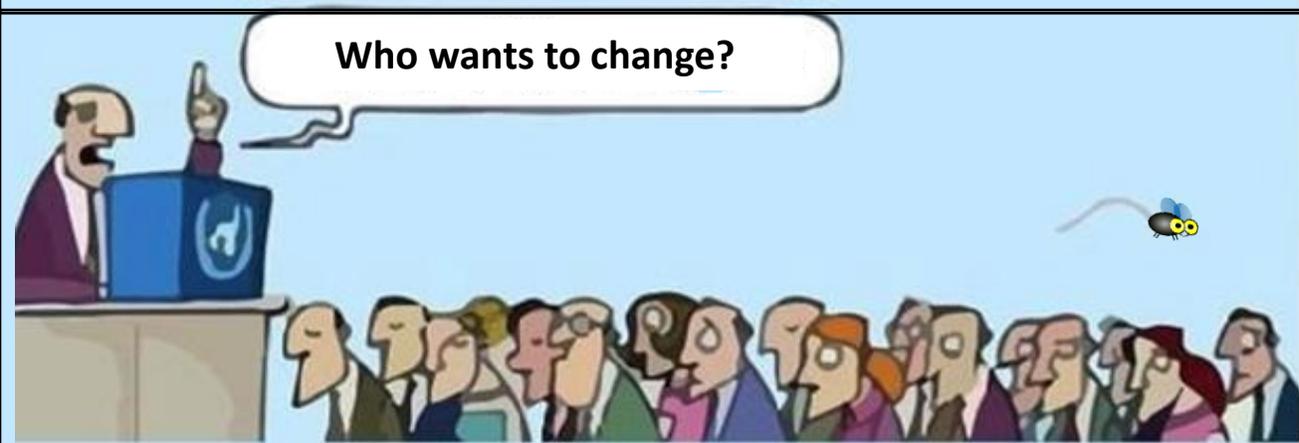
*1705 - 1790*





**¡¡Nunca, pero nunca te rindas!!**







**THANK YOU  
HAVE A  
*GRAPE* DAY  
BECAUSE IS A  
*GRAPE-IDEA***

Oscar Coco Salgado



**AgroFresh**

