

Crisil

a company of **S&P Global**



Monthly dashboard - Cucumber & Gherkins

Jan-2026

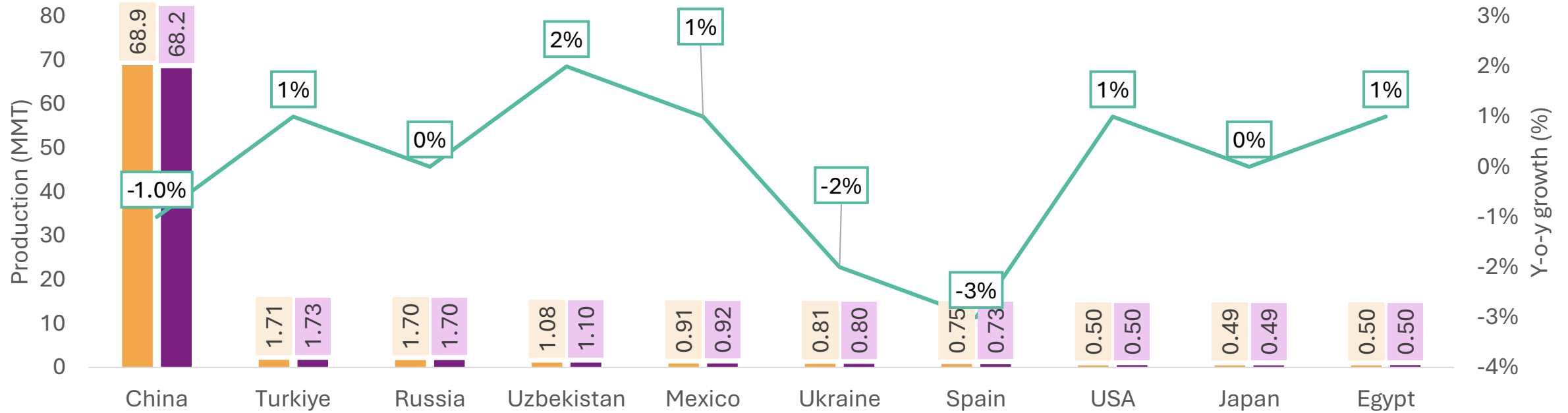


Acreage and production trends



Production estimate of major producing countries

Cucumber and gherkins production estimates



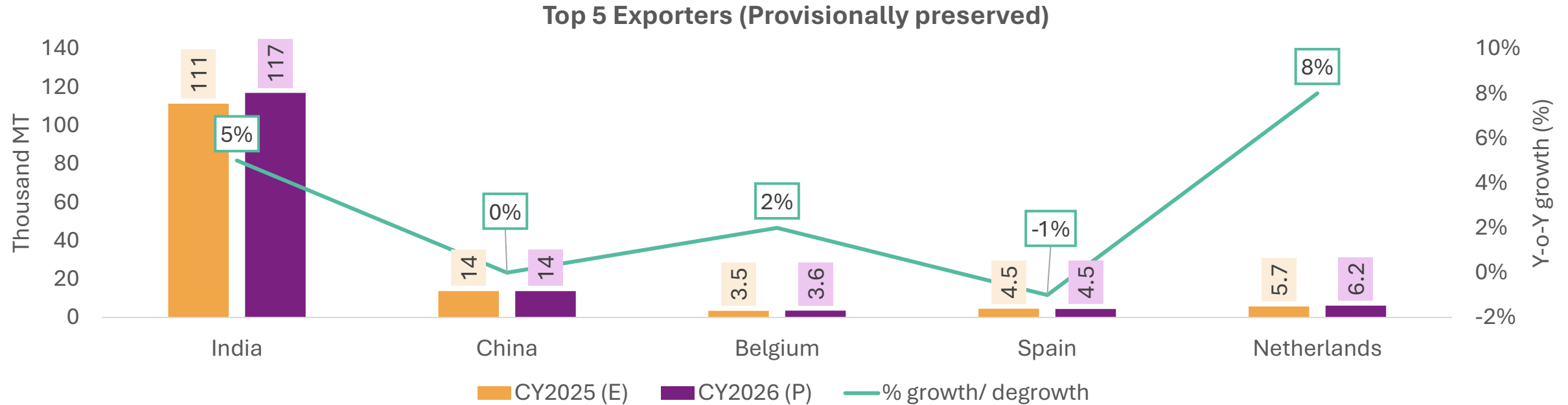
P – Projected value; CY – Calendar year; MMT – Million MT
■ 2025 (E) ■ 2026 (P) — % growth/ degrowth

- Top 10 countries **account for ~90% of cucumber & gherkin output; China alone contributes ~80%.**
- In China, cucumber belt spans central and northern provinces. Greenhouse area continues to expand, stabilizing yield and reducing seasonality in these regions.
- Turkey, the second-largest producer of cucumbers and gherkins, faced one of its driest years in 2025¹, with severe drought conditions affecting key growing regions in central and southern parts of the country. Given continued water shortages and reduced field productivity, production growth is expected to remain stagnant, with only a marginal increase of around 1% in CY2026.
- Global consumption rising steadily across North America, Europe, Asia-Pacific, and Latin America. Global market growth of pickling and ready-to-eat segments driving demand growth.



Export trends and price outlook

Major exporters of Cucumber and Gherkins



E- Estimated ; P – Projected value; CY – Calendar year

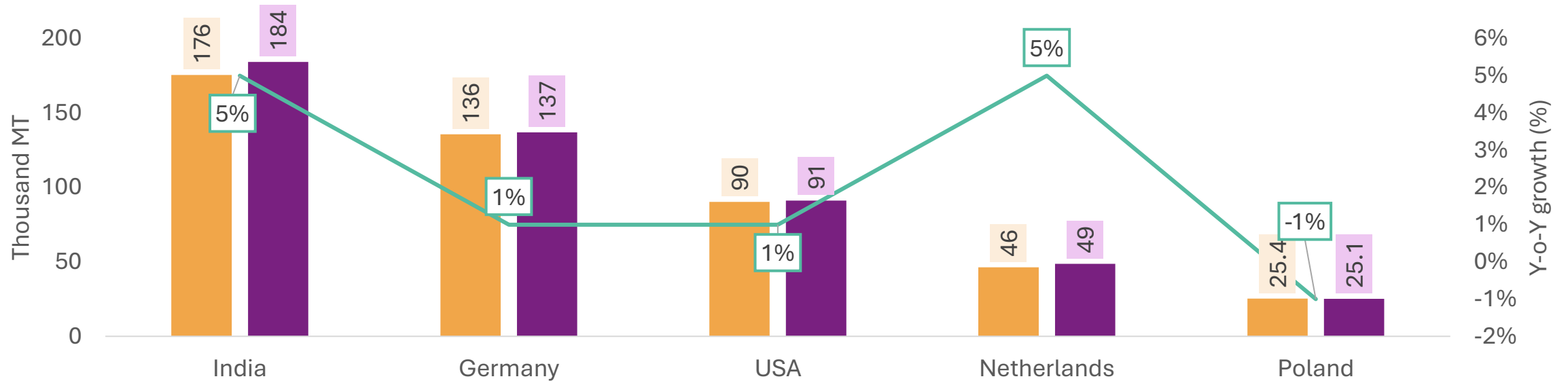
Source: CY25 export volume figures are sourced and estimated from ITC Trade Map; CY26 figures are projected based on trade estimates.

HS code: 071140

- The top 5 exporting countries account for approximately **95% of global exports**.
- India dominates the market with a 76% share; export volumes are forecasted to grow by 4-6% in 2026.
- European market exports projected to grow 1–2% in volume as health-conscious snacking trends, premium pickle category growth, and rise of plant-based diets boosting gherkin consumption in EU and UK.
- Turkey's supply disruption (drought) is the biggest structural risk — any sustained shortfall opens market for India and other origins.
- Spain imports bulk brined gherkins (HS 071140) from India and Turkey for value addition and re-export as vinegar-pickled (HS 200110); In CY2026 domestic production is expected to impact (~15% yield decline) due to pest and adverse weather. This will result in increasing import dependence.

Major exporters of Cucumber and Gherkins

Top 5 exporters (prepared or preserved by vinegar or acetic acid)



E- Estimated ; P – Projected value; CY – Calendar year

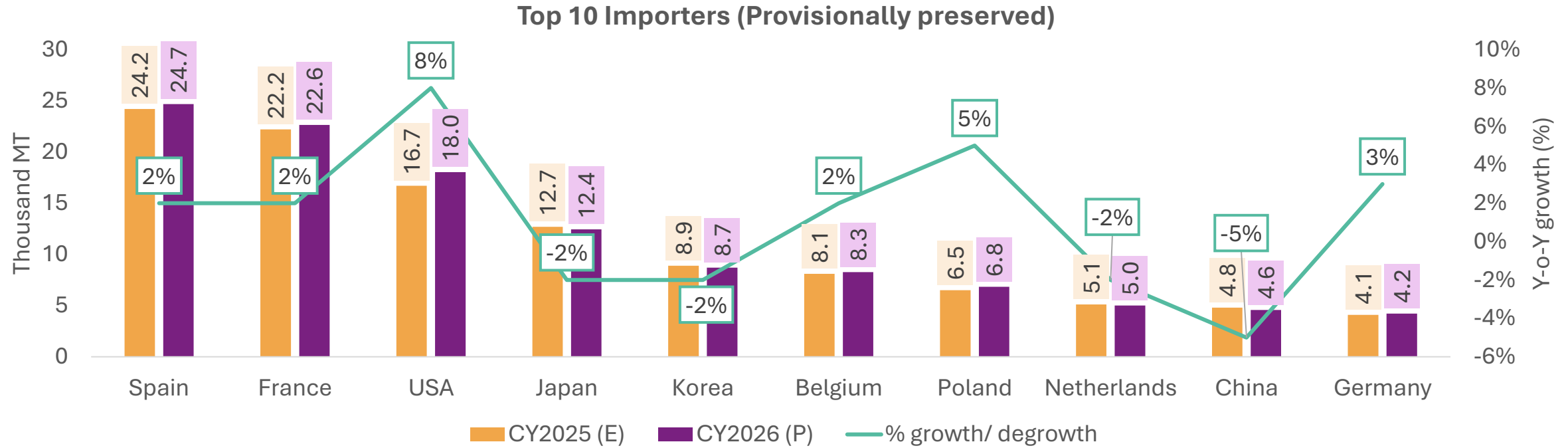
■ CY2025 (E) ■ CY2026 (P) — % growth/ degrowth

Source: CY25 export volume figures are sourced and estimated from ITC Trade Map; CY26 figures are projected based on trade estimates.

HS code: 200110

- Global exports of cucumbers & gherkins (prepared/preserved in vinegar or acetic acid) projected to **grow 3-6% in CY26P**.
- India, the Netherlands, and Germany have emerged as key drivers of export growth.
- The drought in Turkey has created a market gap for India to capitalize on. With the EU's demand growing 3-4% annually, India's new processing capacity¹ (Freshara Unit II) will support volume growth.
- Germany's exports have undergone a slight shift from volume to value in 2024-25, driven by premiumization trends. Products such as Spreewald PGI gherkins, organic gherkins, and innovative flavor lines (Kühne's new launches) are commanding higher margins.

Major importers of Cucumber and Gherkins



E- Estimated ; P – Projected value; CY – Calendar year

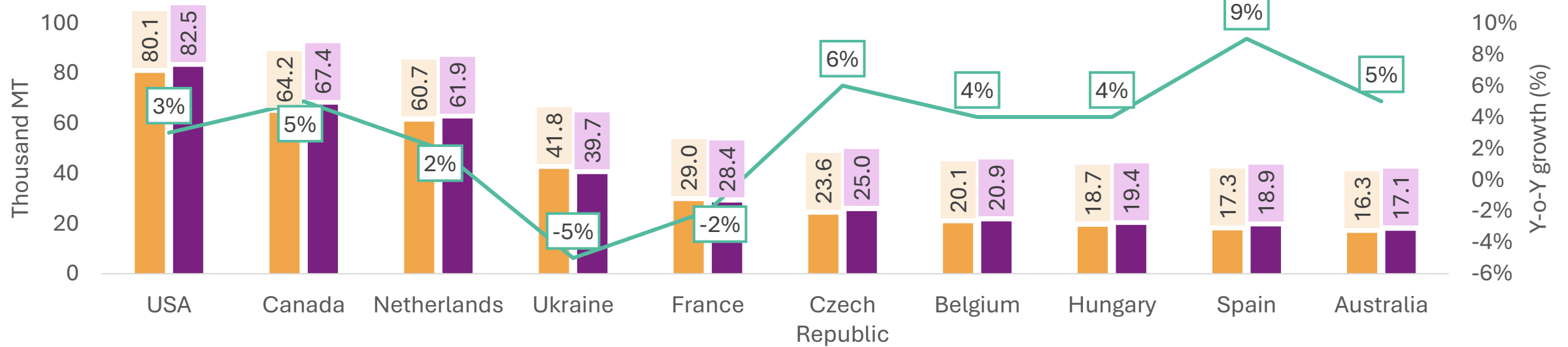
Source: CY25 import volume figures are sourced and estimated from ITC Trade Map; CY26 figures are projected based on trade estimates.

HS code: 071140

- Countries covered in the chart **account for ~80% of global imports** of provisionally preserved cucumbers & gherkins
- Global imports expected to **grow by 5–7% in CY26P**, driven by higher demand from United States, Poland, and France.
- U.S. imports surged 65% in CY25 till Q3 compared to CY24 till Q3¹, largely due to strong domestic demand, also ease of tariffs on India recently, expected to boost imports in CY2026.
- In contrast, CY2026(P) South Korea and China expected to record lower imports amid robust domestic production.

Major importers of Cucumber and Gherkins

Top 10 Importers (prepared or preserved by vinegar or acetic acid)



E- Estimated; P – Projected value; CY – Calendar year ■ CY2025 (E) ■ CY2026 (P) — % growth/ degrowth

Source: CY25 import volume figures are sourced and estimated from ITC Trade Map; CY26 figures are projected based on trade estimates.

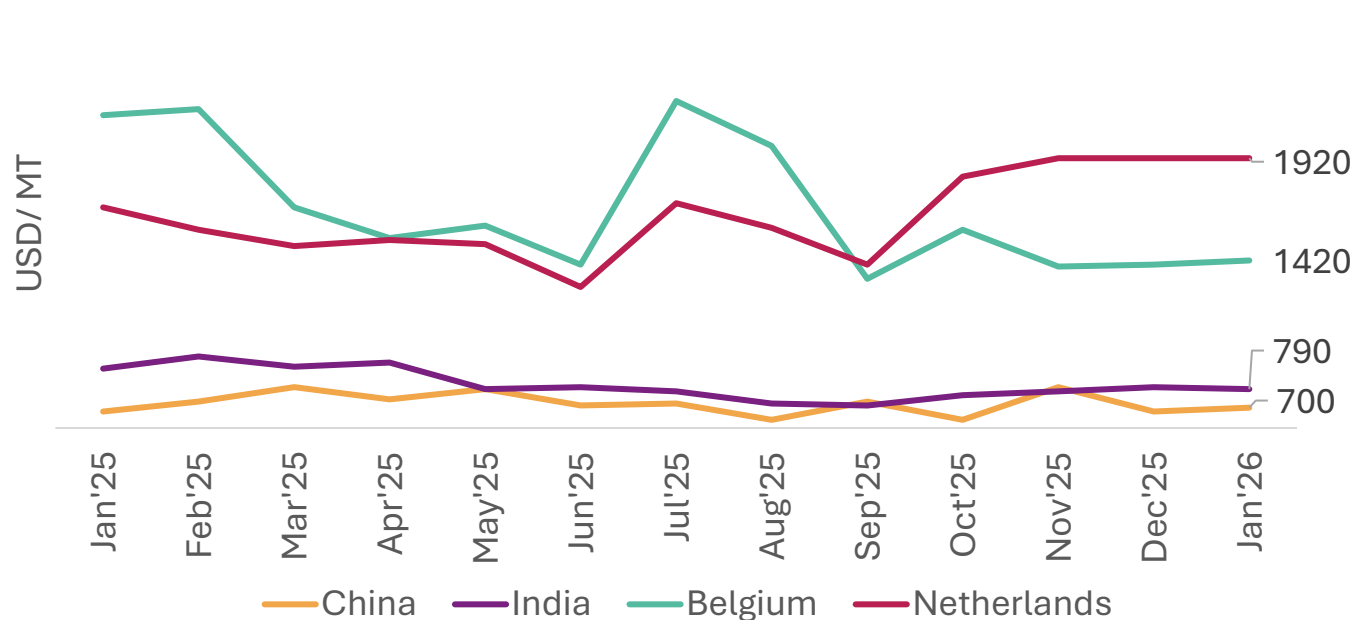
HS code: 200110

- The countries shown account for **~65% of global imports of cucumbers & gherkins preserved in vinegar.**
- **Global import volumes expected to rise by 10-12% in CY2026P;** EU makes up 55–60% of global import value for RTE products.
- US imports are expected to rise in CY2026 (~3%), driven by strong demand, growth in the domestic pickle market, and increased supply from Vietnam*.
- Netherlands imports are expected to grow by 2% YoY, reflecting steady re-export and distribution demand within the EU*.
- EU demand also set to grow marginally, offering opportunities for Indian exporters.

*Source: Trade estimates

Export prices forecast – Fundamental analysis

Export price trend (Provisionally preserved)



Source: Price is sourced and estimated using monthly price data of ITC trade map and trade estimates

Price outlook for next three months					
Countries	Jan'26 Price	Jan'25 Price	Change over year	Price direction	Forecasted Average price range for FMA*
	(USD/MT)	(USD/MT)	change		(USD/MT)
China	700	680	3%	Sideways	660-725
Netherlands	1920	1680	14%	Bullish	1910-1990
India	790	890	-11%	Bullish	790-820
Belgium	1420	2130	-33%	Bullish	1430-1470

Note: Price forecasting is based on the fundamental analysis.

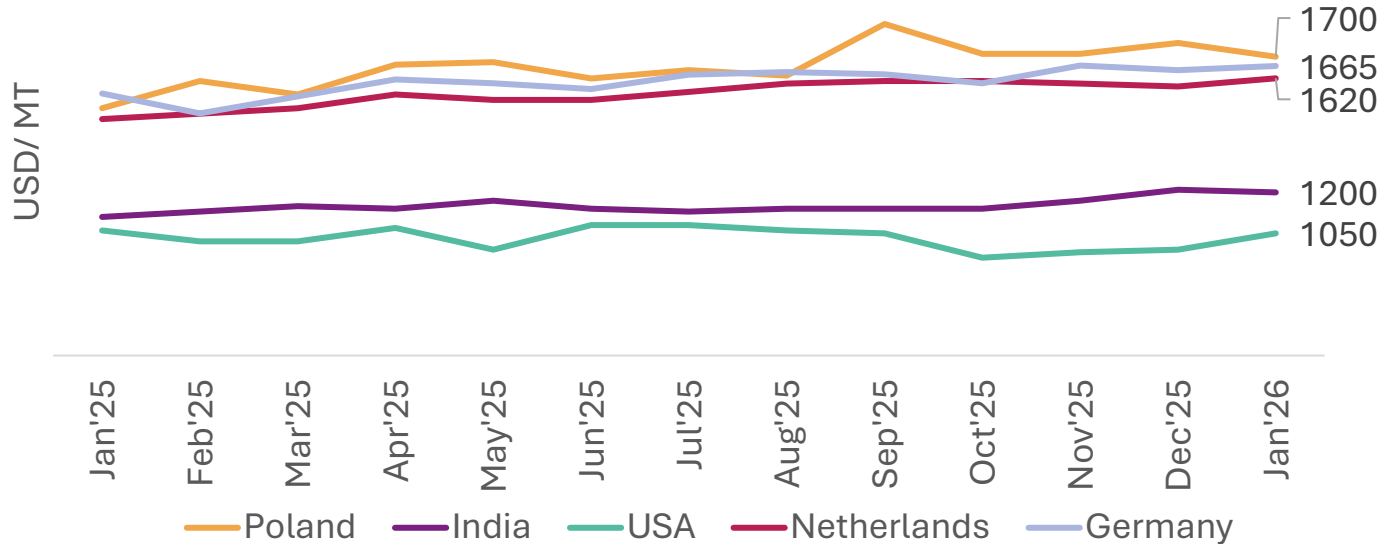
* FMA stand for February, March and April 2026

- **China's production for MY26 is expected to decline marginally by 1-2%.** Prices likely to hover in the range of 660–725 USD/MT with marginal upward bias due to marginal decline in production and rising domestic demand.
- Indian exporters face higher freight and input costs – moderate increase in price is expected as demand in EU countries is likely to increase.
- Overall global export prices are likely to remain marginally bullish to sideways in the upcoming quarter.

Note: Price estimation and forecasting is based on the fundamental analysis.

Export prices forecast – Fundamental analysis

Export price trend (Prepared/ preserved by vinegar)



Source: Price is sourced and estimated using monthly price data of ITC trade map and trade estimates

Price outlook for next three months*					
Countries	Jan'26 Price	Jan'25 Price	Change over year	Price direction	Forecasted Average price range for FMA*
	(USD/MT)	(USD/MT)	change		(USD/MT)
Poland	1700	1510	13%	Bullish	1720-1760
India	1200	1110	8%	Bullish	1210-1230
USA	1050	1060	-1%	Sideways	1000-1080
Netherlands	1620	1470	10%	Sideways	1560-1640
Germany	1665	1564	6%	Bullish	1700-1750

Note: Price forecasting is based on the fundamental analysis.

* FMA stand for February, March and April 2026

- Germany's market reflects premium positioning**, with imports supplementing moderate domestic production. Demand for high-quality vinegar-preserved gherkins remains strong, sustaining premium pricing. **Prices are likely to remain firm in the 1700-1750 USD/MT range in coming quarter**, supported by premium demand and controlled supply.
- The US domestic production is expected to see a marginal growth of 1% in MY26. Demand from the processed food and foodservice sectors is likely to remain consistent. However, ongoing trade tensions and high tariffs are keeping the market uncertain. As a result, prices are likely to remain firm in the upcoming quarter, trading around \$1000-1080 USD/MT.

Note: Price estimation and forecasting is based on the fundamental analysis.

Thank You

Methodology for price forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

Data Collection



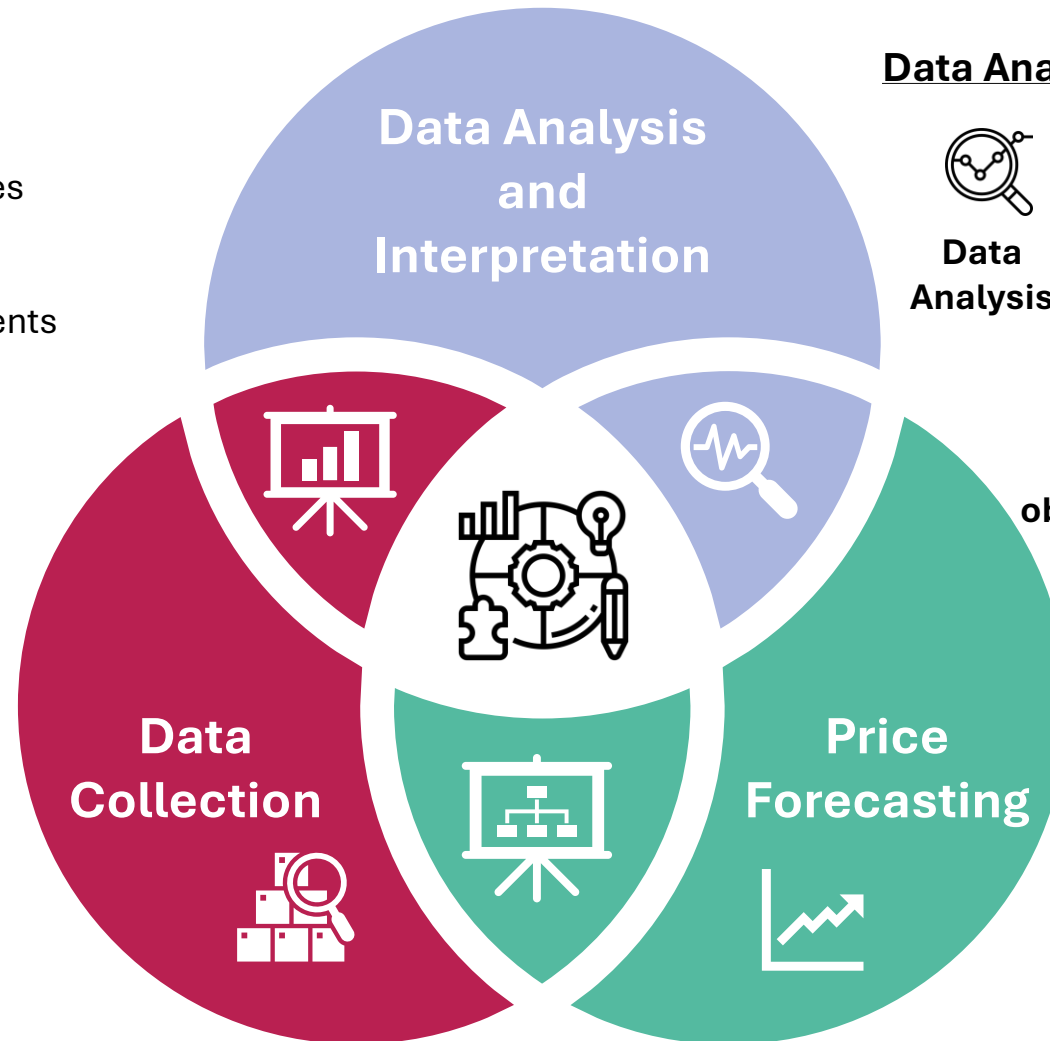
Sources

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports



Policy Updates

- Detailed review of Production policies & trade barriers for each country
- Data from government websites & official publications



Data Analysis and Interpretation



Data Analysis

- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations



Key objectives

- Production trends
- Trade dynamics
- Policy implications

Price Forecasting

- Historical Trend & Seasonality
 - Macro-Economic & Trade Variables
- Integration of commodity fundamentals with and their analysis to forecast future price ranges.

Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.

2026 data is based on trade estimates and fundamental analysis due to unavailability of real time data on secondary sources