Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard- Potato

Jan-2026

Acreage and production trends

Potato Crop Calendar of Major Producing Countries

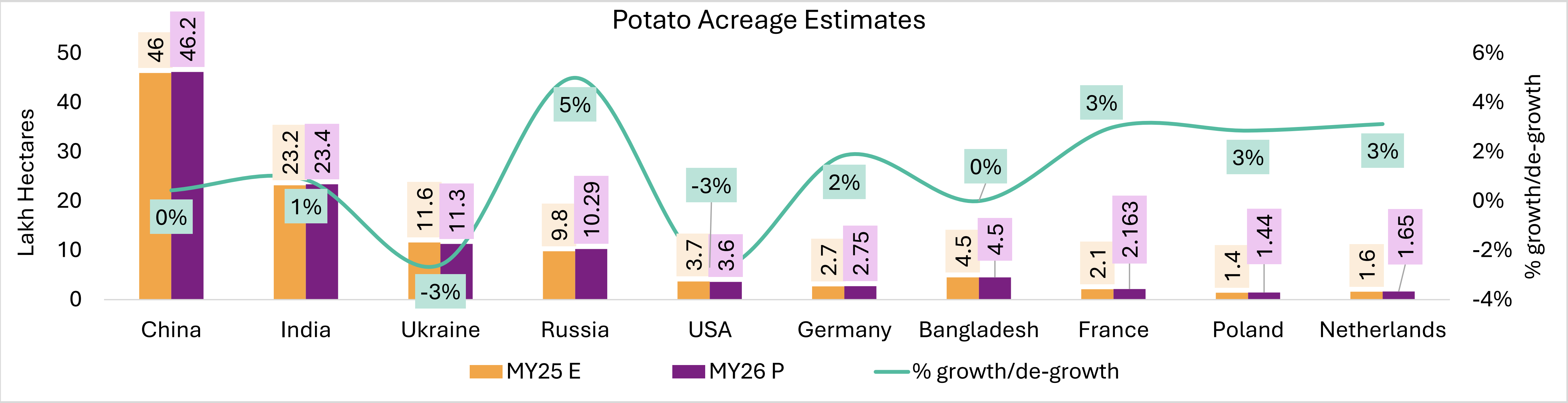
Countries	Season	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China	North												
	South (Autumn)												
	South (Winter)												
India	Rabi												
Ukraine	Main												
Russia	Main												
USA	South												
	North												
Germany	Main												
Bangladesh	Main												
France	Main												
Poland	Main												
Netherlands	Main												

- Potato cultivation is predominantly concentrated in a single winter season across most countries, with the notable exceptions of China and the United States. In regions such as India, Bangladesh, and parts of China, the harvesting period largely overlaps, typically falling between January and March.
- In European countries like France, Germany, Poland, and the Netherlands, potato production follows a compact growing season with consistently high yields. To ensure year-round market supply, these countries rely on extensive cold-chain storage and well-developed post-harvest infrastructure.
- Significant regional disparities exist both within and between countries in terms of yield levels and production efficiency. Nations like India and Bangladesh have recorded strong production growth in recent years, driven by the adoption of high-yielding varieties (HYVs) and the expansion of improved irrigation practices.
- Meanwhile, countries such as Germany, France, the Netherlands, Poland, and the USA stand out for their high levels of mechanization, advanced processing facilities, and overall production efficiency, which collectively translate into superior yields and consistent quality.

Note: *As per USDA, **Marketing year (MY)** for Potato is considered as (August - July)*

Sowing | Harvesting

Acreage Estimates of Major Producing Countries

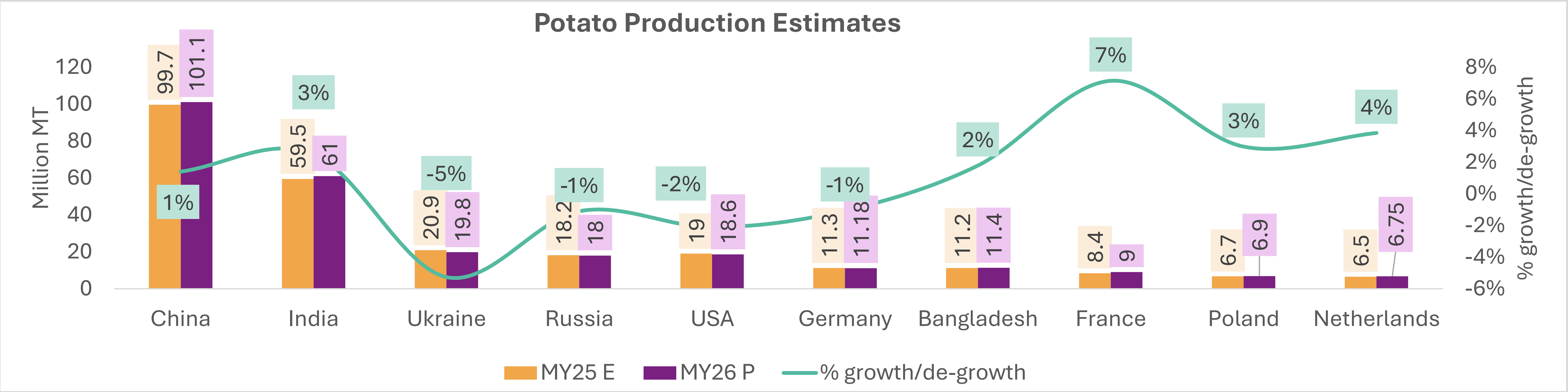


P – Projected value; MY – Marketing year (Aug-Jul)

- The countries highlighted in the chart **account for nearly 68% of the world's potato acreage**, with global potato acreage expected to marginally **improve by ~1% in MY26P, on a low base and driven by better realization in MY25,** despite declines in Ukraine and the United States.
- **The United States is projected to see a decline in acreage** due to lower contracted volumes from processors, surplus supplies, weak demand, and adverse weather conditions, with a 2-3% reduction in planted acreage forecasted by the USDA.
- The **EU is expected to see a 5.5% rise in potato acreage** to a record 1.47 million hectares in MY26, driven by strong growth in seed potato area in countries like the Netherlands, Germany, and France.
- **China's Sichuan province is estimated to have stable acreage on year**, with new high-yielding potato varieties gaining traction.
- **France is expected to see a sharp growth in area under potatoes**, both for processing and fresh acreages, excluding early planted varieties, according to the National Union of French Potato Producers (UNPT).

Source: Potato acreage estimates by country for MY25 and MY26 are derived from trends observed in FAOSTAT data.

Production Estimates of Major Producing Countries



P – Projected value; MY – Marketing year (Aug-Jul)

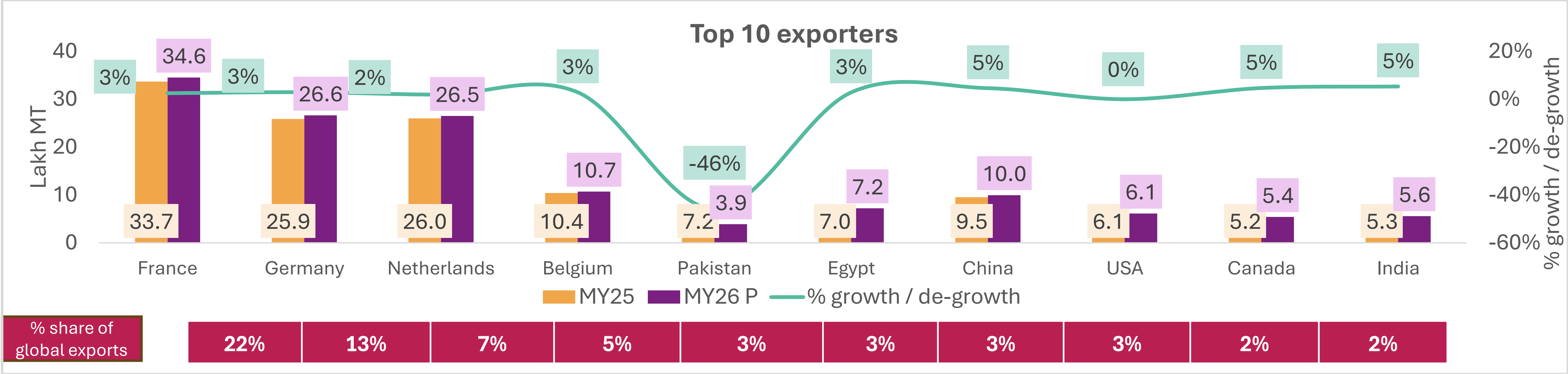
- The countries highlighted in the chart account for **nearly 68% of global potato production**. Global output is expected to increase marginally by 1–2% year-on-year.
- **China's MY26 production is projected at 101.1 MMT, keeping its lead as the top producer**, supported by stable acreage, government food security initiatives, improved varieties, mechanization, and steady yield growth.
- **The Netherlands[1]** recorded a **strong ware potato** crop in **2025**, with production rising **37% YoY**, driven by a **9% increase** in planted area, favorable weather, and yields of 53–54 t/ha. However, as fresh ware potatoes make up only 20–25% of exports (seed and processed products dominate), overall Dutch potato exports rose moderately by 4%.
- **Germany faces production challenges from Stolbur disease[2]**, which causes wilting. This may benefit Indian exporters, as Germany exports to Oman, Indonesia, Vietnam, Malaysia, and the UAE—also key Indian potato markets.
- **Ukraine's potato production is set to decline** due to spring frosts and labor shortages from the war. With harvests starting in August, high storage and logistics costs are expected to keep market prices elevated.

Source: Potato production estimates by country for MY25 and MY26 are derived from trends observed in FAOSTAT data.

1. The Netherlands ware potatoes, 2025, 2. Deutsche Welle, 2025

Export trends and price outlook

Major Exporters of Potato

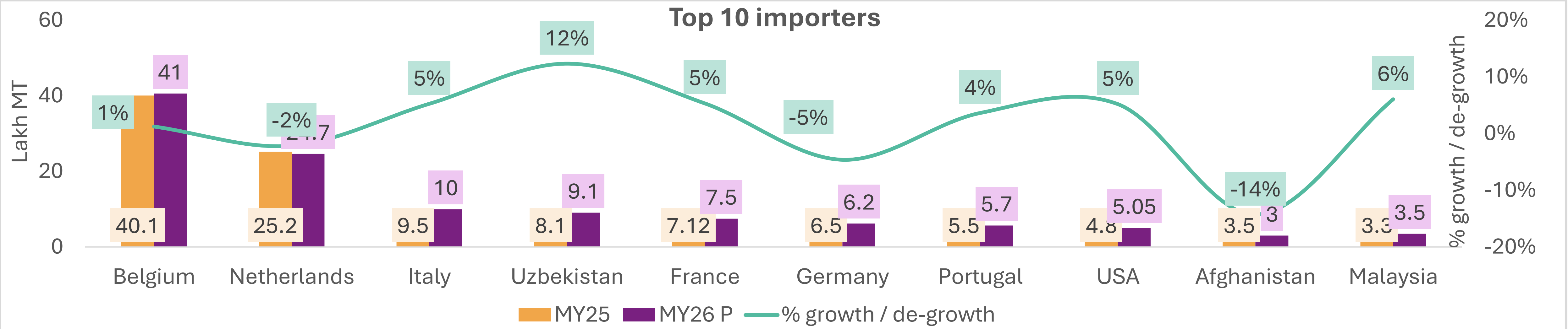


P – Projected value; MY – Marketing year (Aug-Jul) *Source: ITC trade map, HS code 0701*

- The **countries in the chart account for about 80% of global potato exports**, with **global exports for MY26 expected to rise by 2–3% year-on-year**. The EU remains the largest supplier, led by France, Germany, Belgium, and the Netherlands.
- **In MY26, Egypt is expected to maintain steady potato export momentum across Russia, the EU, and Arab markets**, supported by its early harvest timing, proximity to key import destinations, and ability to supply consistent quality during seasonal supply gaps in importing countries.
- **In MY26, EU potato exports are expected to grow at modest rate (1-2%)** as production in North Western Europe alone reached about 30 MMT[2], up 10% year on year, accounting for ~2/3rd of total European output.
- **Belgium has nearly completed its 2025 potato harvest**, with mostly high yield and quality, though hot, dry summ er conditions affected size and dry matter in some areas.
- **Pakistan faces a glut driven export disruption[1], with production at 13 MMT and an estimated 4 MMT surplus after potato exports fell ~50% following border closure with Afghanistan & an import ban by Russia.** Export focus is now shifting toward Kazakhstan & Uzbekistan, with shipments expected to start from March, while alternative corridors via Iran and China are being evaluated to absorb surplus and stabilise domestic markets.

Source: ITC trade map, HS code 0701; 1. Ministry of National Food Security, Pakistan 2. [France24]

Major Importers of Potato



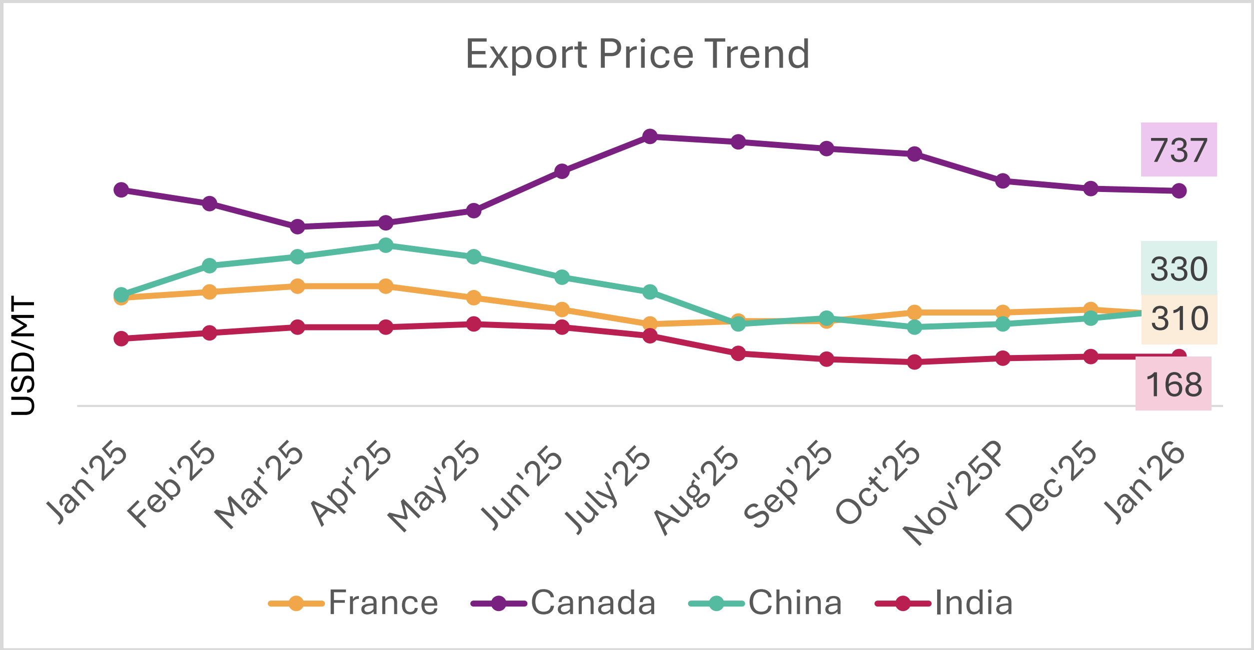
% share of global imports	Belgium	Netherlands	Italy	Uzbekistan	France	Germany	Portugal	USA	Afghanistan	Malaysia
	22%	**13%**	**7%**	**5%**	**3%**	**3%**	**3%**	**3%**	**2%**	**2%**

P – Projected value; MY – Marketing year (Aug-Jul)

- **Belgium's potato imports are projected to reach around 41 LMT in MY26**, with a CAGR of 5–6% (MY20–MY24). Imports are expected to remain minimal and selective due to heavy domestic and EU stocks. Inflows will mainly cover processing specific gaps, as old crop availability extends into early summer in Belgium.
- **Uzbekistan has agreed to import surplus potatoes from Pakistan[1] to cover short-term supply gaps before the local harvest.** Imports are likely to be opportunistic and price-led, rather than structural.
- **Italy's imports are expected to increase year-on-year**, with demand for **branded origin potatoes** (POD and PGI) **outperforming conventional varieties** due to higher consumer recognition.
- **Afghanistan is likely to continue diversifying potato imports away from Pakistan,** with higher reliance on Iran and Central Asia, implying higher logistics costs and firmer import prices in early 2026 until regional new crop supplies enter the market.
- Malaysia, which relies on imports to supplement weak domestic output, is projected to see imports rise by 5–6% in MY26. Imports from Egypt have increased, with Egypt's share growing from 0.5% in 2024 to 1.5% of Malaysia's import basket.
- **Portugal's potato imports are projected to rise in MY26,** driven by a persistent supply gap between domestic production (~4.0–4.5 lakh MT) and consumption (~9.0 lakh MT).

Source: ITC trade map, HS code 0701; PGI : Protected Geographical Indication, POD : Protected Designation of Origin; 1:Freshplaza

Price Trends of Key Exporting Nations

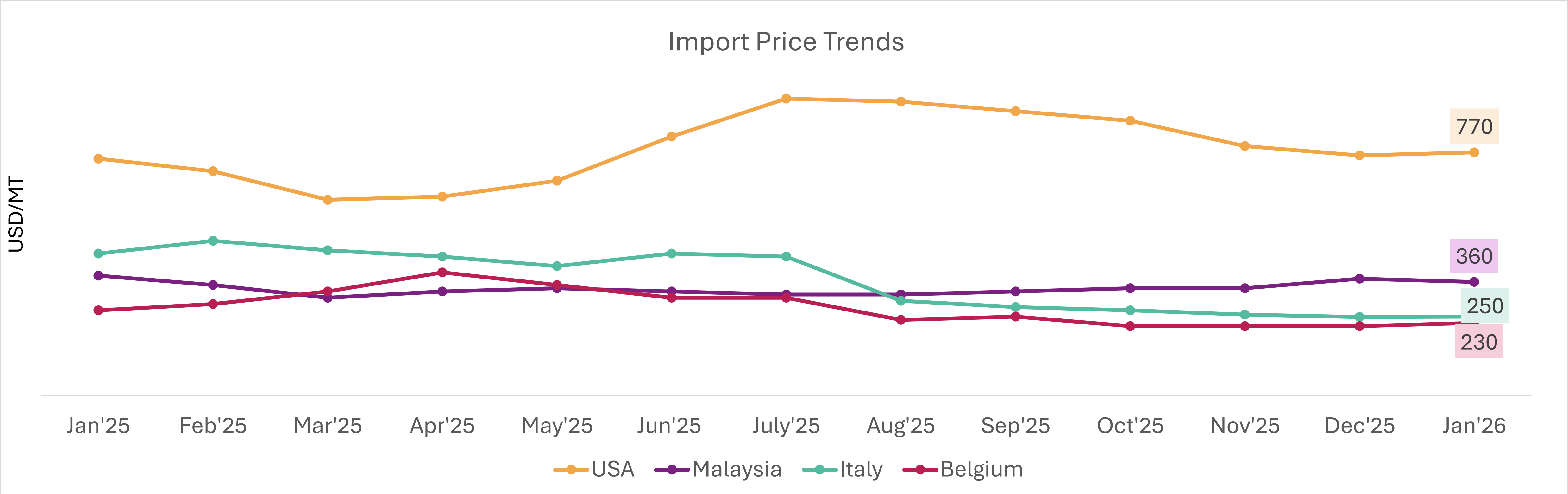


Price outlook for next quarter (FMA)*					
Countries	Jan'26 Price (USD/MT)	Jan'25 Price (USD/MT)	%age change	Price direction	Average price range for FMA (USD/MT)
France	310	370	**-16%**	**Bearish**	280-320
Canada	737	739	0%	**Sideways**	730-760
China	330	380	**-13%**	**Bullish**	330-390
India	168	230	**-27%**	**Bullish**	170-200

- **France's export prices remain under pressure in January 2026 at around USD 310/MT**, with large inventories from the previous harvest and stagnant EU demand limiting upside. Next quarter is expected to see slightly bearish prices.
- In Canada, **prices declined 11% month-on-month in November 2025 and have since stabilized within the same range**. Processing contracts continue to support prices, but early crop arrivals in western provinces and logistical constraints in PEI are constraining export growth, keeping next quarter prices steady.
- In China, export prices are **bullish post-Chinese New Year as higher logistics costs and expanded processing volumes support strong demand** in Southeast Asia and the Middle East, keeping next quarter prices firm.
- **In January 2026, Indian potato export prices held steady.** Outlook for the next quarter indicates stable to firm levels, supported by ongoing demand from Gulf and neighboring markets.

Source: ITC trade map, HS code 0701 ; Note: Price forecasting is based on the fundamental analysis. FMA stand for February, March and April 2026; Above prices are FOB
PEI: Prince Edward Island Variety in Canada

Price Trends of Key Importing Nations



- **US import prices remained range-bound at ~USD 750 to 800 per MT, as lower domestic prices reduced reliance on imports despite ongoing trade and logistics pressures.**
- **Malaysia's** wholesale potato prices in early 2026 averaged roughly USD 1.16–1.24 per kg at the wholesale level, **reflecting the price range for potatoes in the market amid steady import supply and stable demand conditions**
- Italy's import price environment for potatoes in early 2026 reflects softening import values amid weak demand and surplus supply.
- **Belgium's 2025 potato harvest is nearly complete**, with 90–95% lifting achieved and broadly stable yields despite summer heat stress. **January 2026 pricing is expected to remain under pressure due to high regional availability and processing potato glut in Northwest Europe**

Source: ITC trade map, HS code 0701

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.

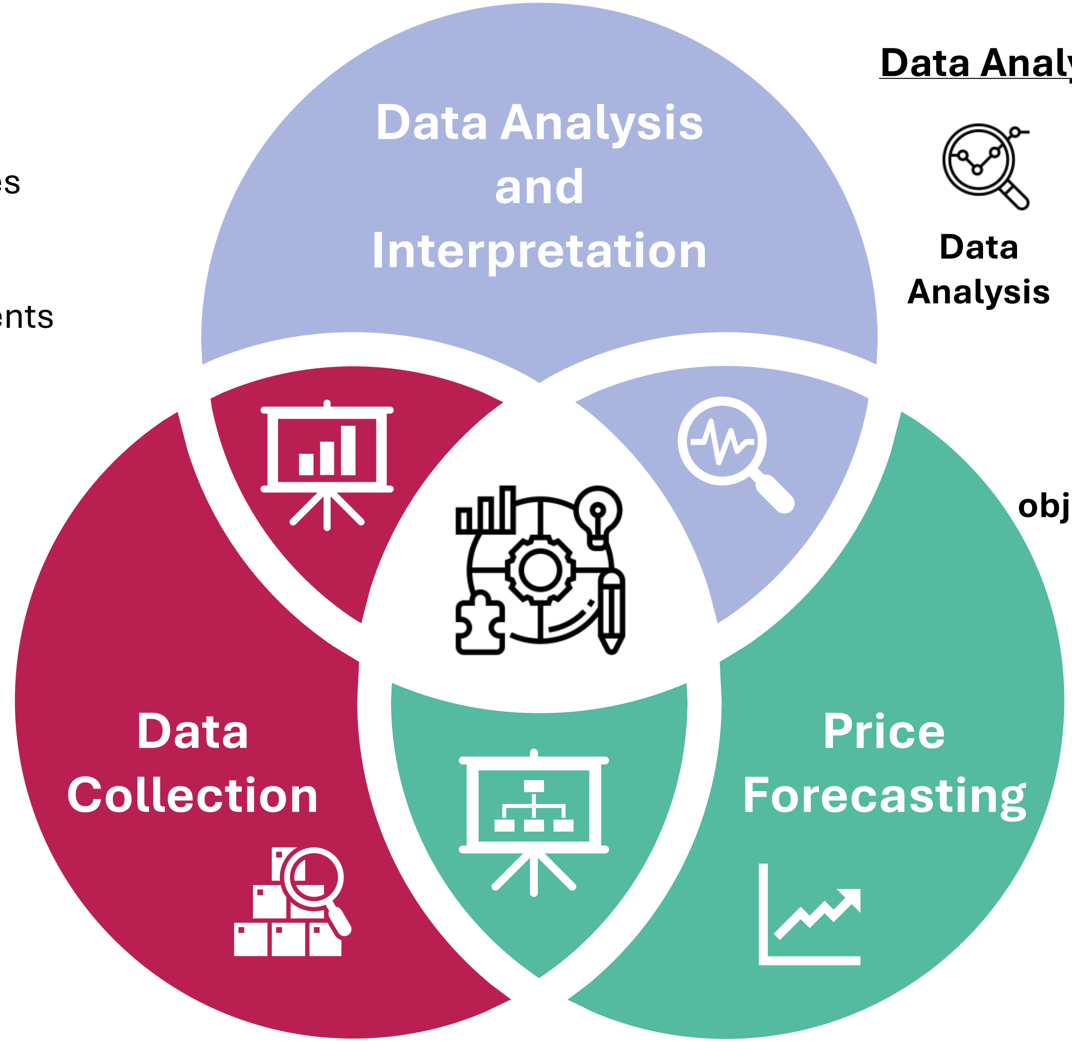
Data Collection

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 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.