Monthly dashboard - Potato

Acreage and production trends

Potato Crop Calendar of Major Producing Countries

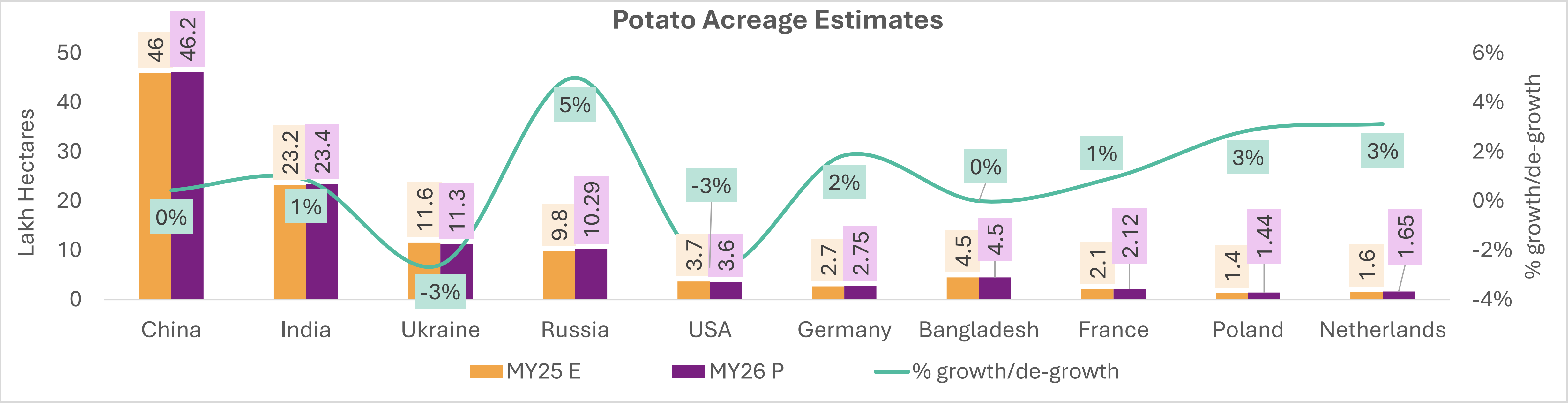
Countries	Season	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China	North												
	South (Autumn)												
	South (Winter)												
India	Rabi												
Ukraine	Main												
Russia	Main												
USA	South												
	North												
Germany	Main												
Bangladesh	Main		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

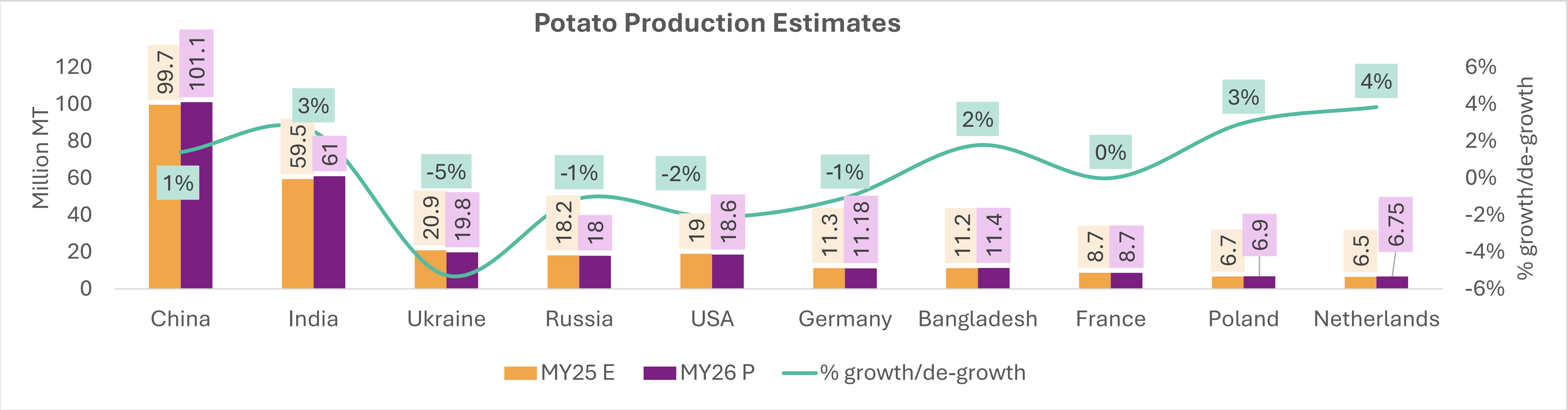
Acreage Estimates of Major Producing Countries



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

- The countries highlighted in the chart **account for nearly 68% of the world's potato acreage**. **Overall, global potato acreage is expected to marginally improve by ~1%, though a decline is anticipated in Ukraine and the United States.**
- Followed by decline in production in MY25, and high domestic prices, acreages in MY26 is estimated to expand. In **the United States**, **acreage is projected to shrink** due to **lower contracted volumes from processors**, **surplus supplies**, weak demand for the early crop, and **adverse weather conditions** particularly in key producing states such as Idaho.
- The **EU potato acreage expects a rise by 5.5%** to a record 1.47 million hectares in MY26. Most EU potatoes are in or near harvest, yields are reportedly stable or slightly above the 5-year average in major producing countries as Germany, Poland and Netherlands.

Production Estimates of Major Producing Countries



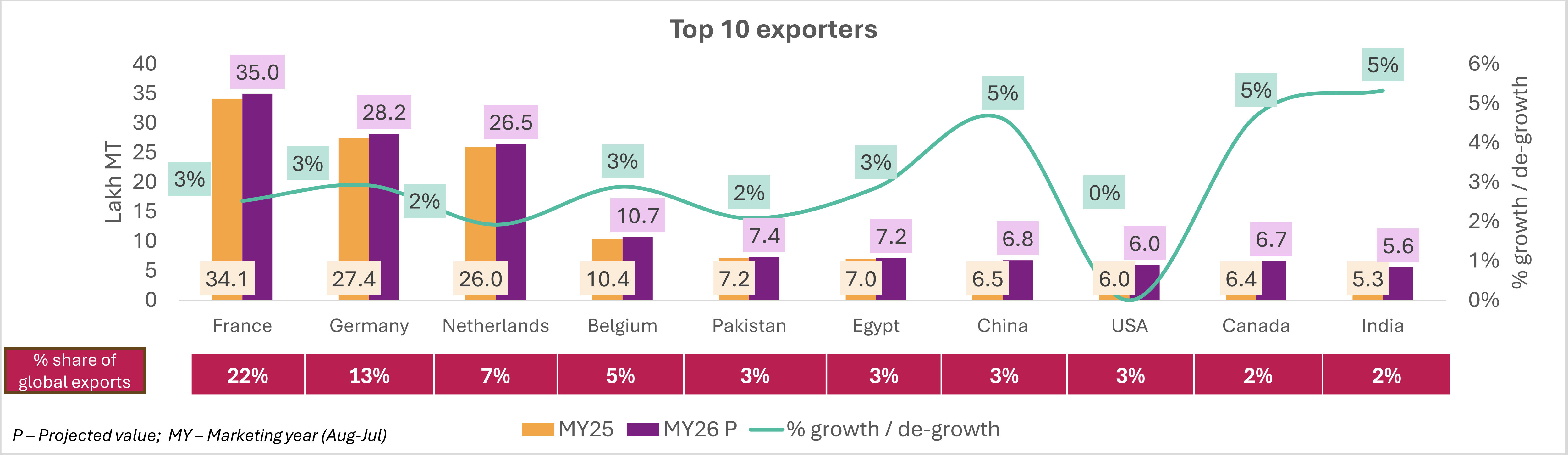
P – Projected value; MY – Marketing year (Aug-Jul)

- The countries highlighted in the chart **account for nearly 68% of the world's potato production**. **Overall, global potato production is expected to increase marginally by 1-2% on year.**
- **In Ukraine the production level for potato is expected to decline** due to unfavorable weather conditions backed by spring frost conditions in the April and June, which is the potato sowing window in the country.
- **China's production for MY26 is projected to reach 101.1 MMT maintaining its position as the world's leading producer**, driven by stable acreage, strong government support for food security, adoption of improved varieties, wide-scale mechanization and steady yield growth
- Germany's potato production is facing challenges due to the spread of Stolbur disease[1], which is causing potatoes to wilt. This could create an opportunity for Indian exporters, as Germany typically exports potatoes to countries such as Oman, Indonesia, Vietnam, Malaysia, and the UAE, which are also key destinations for Indian potato exports.

Source : 1 Deutsche Welle, 2025

Export trends and price outlook

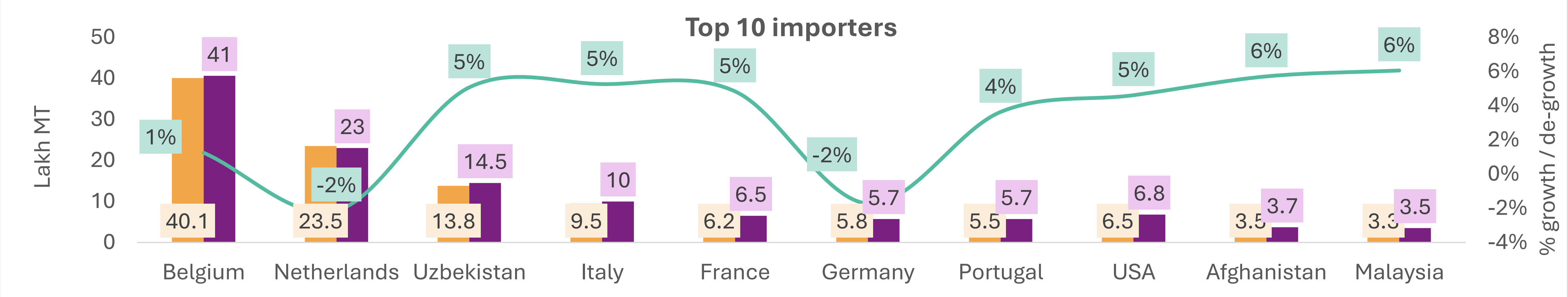
Major Exporters of Potato



- The countries in the chart **accounts for ~80% of the global exports**. **Global exports for MY26 are expected to increase by 2-3% on year**. The EU remains the largest global supplier of fresh potatoes, led by **France, Germany, Belgium, and the Netherlands**.
- Across these countries, **exports are projected to see a 2-3% growth on year**, driven by consistent demand within Europe and in key external markets like the UK, North Africa, and the Middle East. **EU exporters are reportedly facing price competitiveness in middle east and south east Asian region from India wherein Indian average export prices are 30-40% less than EU exporters like France and Netherlands.**
- Indian exports represent about 9–10% of the country's total production, contributing roughly 3–4% to global potato exports (HS code 0701, fresh/chilled potatoes).
- **India, China and Canada exports are projected to increase by 4-5% on year in MY26** with higher production prospects and improved demand from processing industry.

Source: ITC trade map, HS code 0701

Major Importers of Potato

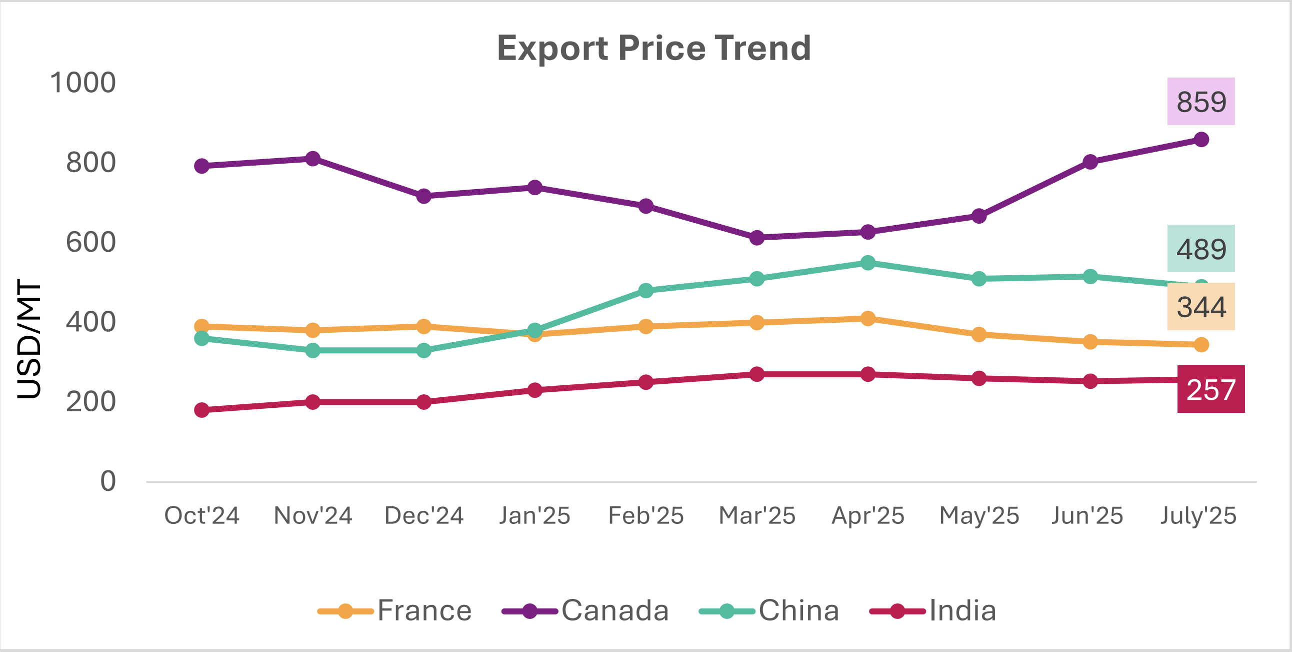


% share of global imports	22%	13%	7%	5%	3%	3%	3%	3%	2%	2%

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

- **Belgium imports are projected to reach ~41 MMT in MY26, with CAGR of 5-6% (MY20-MY24).** Import growth has been robust, with the France, Netherlands and Germany emerging as the fastest-growing sources for Belgian imports.
- Uzbekistan consistently sets new records for potato imports, reporting significant increase in recent years (CAGR 33% from MY20-MY24). Main suppliers to the country are Iran, Kazakhstan, and Pakistan. High consumption, expanding cold storage, and lingering production gaps are expected to drive sustained imports.
- **Canada's PEI (Prince Edward Island) Potato industry had recently sent delegates to Indonesia and Philippines in order to diversify their export market amid growing geopolitical tensions with US, a key import market.**
- **Afghanistan** remains a net importer due to limited local production and high domestic consumption. **Imports are expected to remain higher by 5-6% on year in MY26.**
- Similarly, **Malaysia** is a consistent net importer of potatoes, relying on steady imports to supplement weak domestic output. **MY26 imports are projected to remain higher by 5-6%.**

Price Trends of Key Exporting Nations

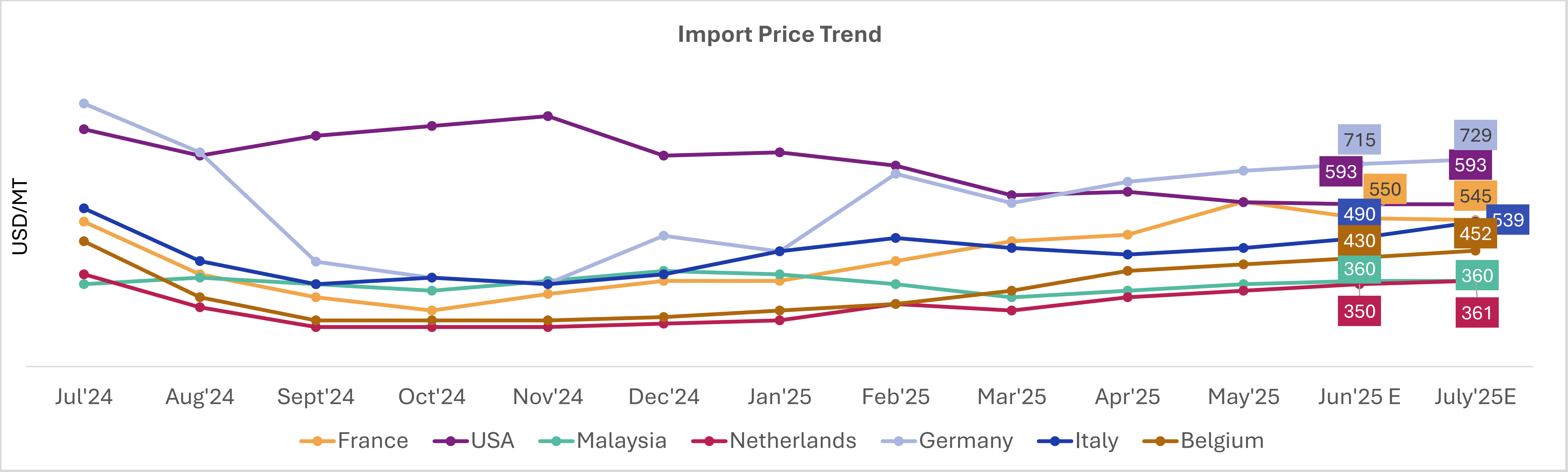


Price outlook for next quarter (ASO)					
Countries	**Jul'25 Price (USD/MT)**	**Jul'24 Price (USD/MT)**	**%age change**	**Price direction**	**Average price range for ASO (USD/MT)**
France	344	440	**-22%**	**Sideways**	340-350
Canada	859	780	**10%**	**Bullish**	870-880
China	489	380	**29%**	**Bullish**	480-500
India	257	218	**3%**	**Sideways**	257-265

- France has seen a decline in export prices since the start of 2025, primarily due to quality concerns and subsequent low demand from traditional markets like Belgium and Italy. However, there is a growing demand from Eastern European countries such as Poland and the Czech Republic, which is expected to support prices and keep them firm in the medium term, potentially offsetting the decline in demand from Western European markets.
- **Canada's** prices are highest among the countries, trending between USD 760 – 820/MT. Canada exports significant share (~93%) of potato to US and with growing geopolitical tension between the two countries over announcement over tariffs, **Canada is expected to cut off supply to US and move to other premium markets like Japan, South Korea and Indonesia** which is expected to **support prices**.
- **China's** export prices softened during the late 2024 harvest but surged sharply in early 2025 with strong export demand (mainly Southeast Asia and the Middle East) and high domestic consumption. **China's prices remain firm into mid-2025, driven by tight stocks and high seasonal demand. Prices are likely to remain elevated in the coming months as well.**
- **India's** potato prices in **MY2025 saw a downturn after high prices in MY24**, higher production and increased stocks. Prices in the upcoming quarter likely to **stay firm** and demand is likely to pick up in the domestic market amid festive season.

Source: ITC trade map, HS code 0701
Note Price forecasting is based on the fundamental analysis. ASO stand for August, September and October , Above prices are FOB

Price Trends of Key Importing Nations



- France import prices fell from 550 USD/MT in Jun'24 to 270 USD/MT by Oct'24 during the peak EU harvest that led to glut like situation. Prices then rebounded to around 600 USD/MT by May'25 with tightened supplies, coupled with higher storage costs, and stronger regional demand for seed potatoes supported the prices.
- US import prices stayed high at 830 USD/MT in late 2024 when in offseason supply was limited and then eased to around 680–700 USD/MT by mid-2025 as domestically stored potatoes and spring crops met processing demand.
- Netherland prices have inched up in recent months due to impacted domestic production fueling import demand from neighboring countries while reportedly many growers are also holding on the stock in anticipation of improved prices in coming moths.
- Malaysia import prices largely remained with in the range of 350-380 USD/MT over the past 1 year. Abundant regional supply from China and India, and stable demand led the prices to remain steady.

Source: ITC trade map, HS code 0701

Way Forward for Indian Potato Exports

Opportunities for Indian Potato Exports - Short Term

- The **Philippines and Thailand are identified as high-potential markets** for Indian potato exports, with strong import growth rates of 11% and 4% respectively between MY20 and MY24.
- India has already made inroads into these markets through indirect exports via Malaysia and now has the opportunity to directly target these countries.
- The main barrier to direct exports has been the **lack of a Phytosanitary Agreement,** but resolving this issue could open up significant new export opportunities.
- **Indian potato export prices are 40-50% lower than those of major suppliers** like China, the US, and EU countries, giving India a competitive edge in these markets.
- Additionally, India is in talks for a **Free Trade Agreement (FTA) with Oman**, which accounts for around 15% of India's potato export basket and has seen a 27% CAGR growth in imports from India over the past five years. **The FTA is expected to provide a boost to Indian exports, further increasing the country's competitiveness in the global market.**

Source: Crisil intelligence

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.

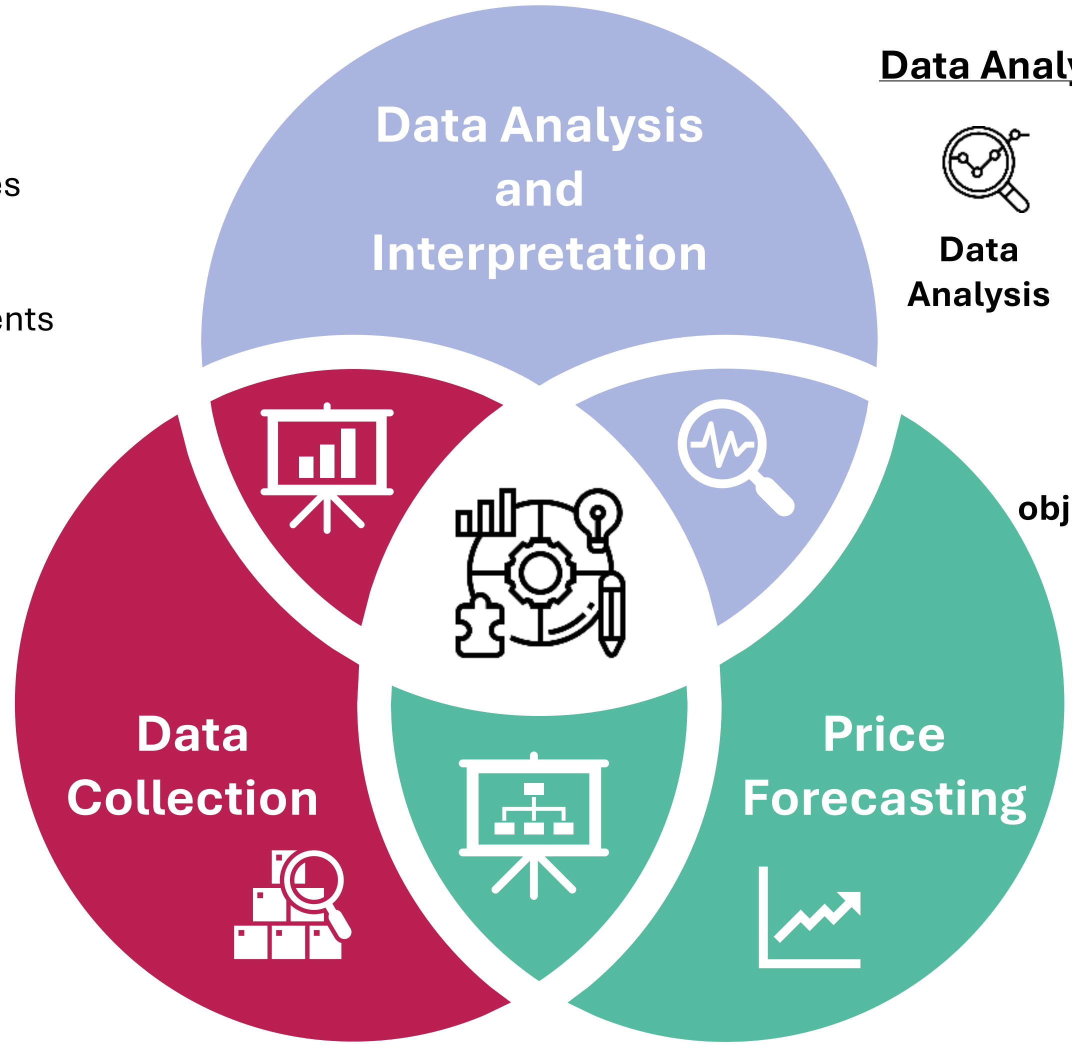
Data Collection

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.