



Crisil

a company of **S&P Global**



Monthly dashboard - Okra

An aerial photograph of a large agricultural field, likely a cornfield, with rows of crops stretching towards a distant treeline. The sky is bright with scattered clouds, and the sun is visible on the left side, creating a lens flare effect. The text "Acreage and production trends" is overlaid on the right side of the image in a large, bold, black font.

Acreage and production trends

Okra crop calendar of major producing countries

Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
India												
Nigeria												
Mali												
Sudan												
Pakistan												
Egypt												
Côte d'Ivoire												
Benin												
Bangladesh												
Cameroon												

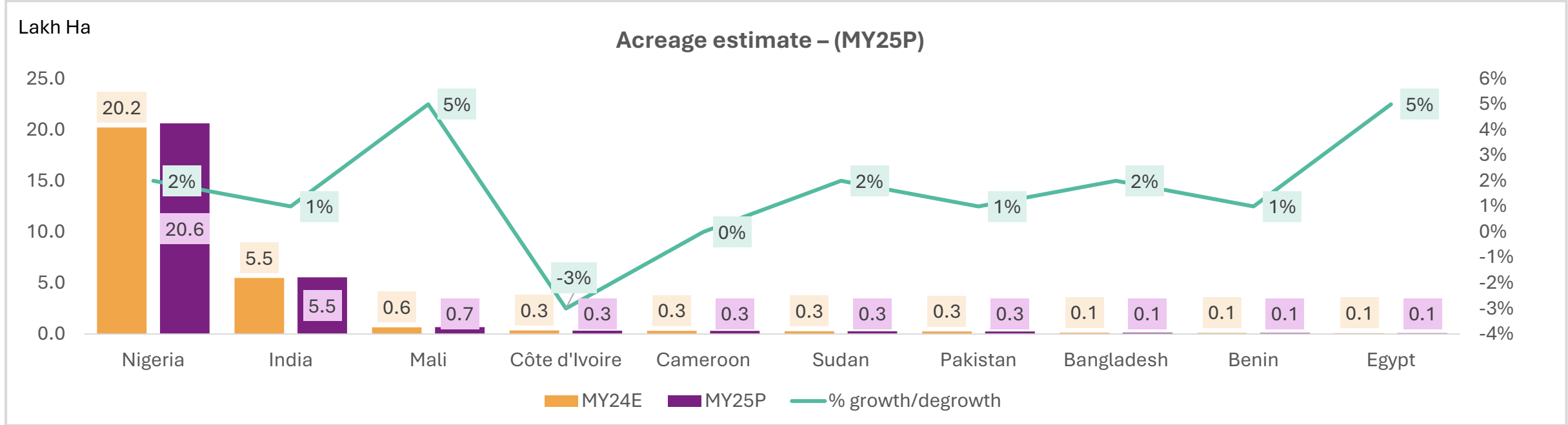
Lean season

Peak season

- The okra crop calendar for major producing countries like India, Nigeria, Sudan, Pakistan have two peak harvesting season in summer and rainy season except Pakistan which witnesses peak harvesting in summer and winter season.
- In Nigeria while okra can be harvested throughout the year, but the peak harvesting period often align with the dry season December to April. However, okra can also be cultivated during the wet season, with harvesting occurring between August and September.
- In Bangladesh, okra (also known as Lady's finger or Dherosh) is typically harvested from February to July. However, with proper management, okra can be produced year-round. The fruits are usually ready for harvest around 45-60 days after sowing, depending on the variety and season.
- In India as well, okra can be harvested year-round in some parts of India, particularly in the south where frost and severe winters are not prominent. In other regions, two main cropping seasons are : Summer and Rainy season crop.

Note: Okra are harvested throughout year globally with crop calendar varies across the countries. Marketing year is considered as Jan-Dec

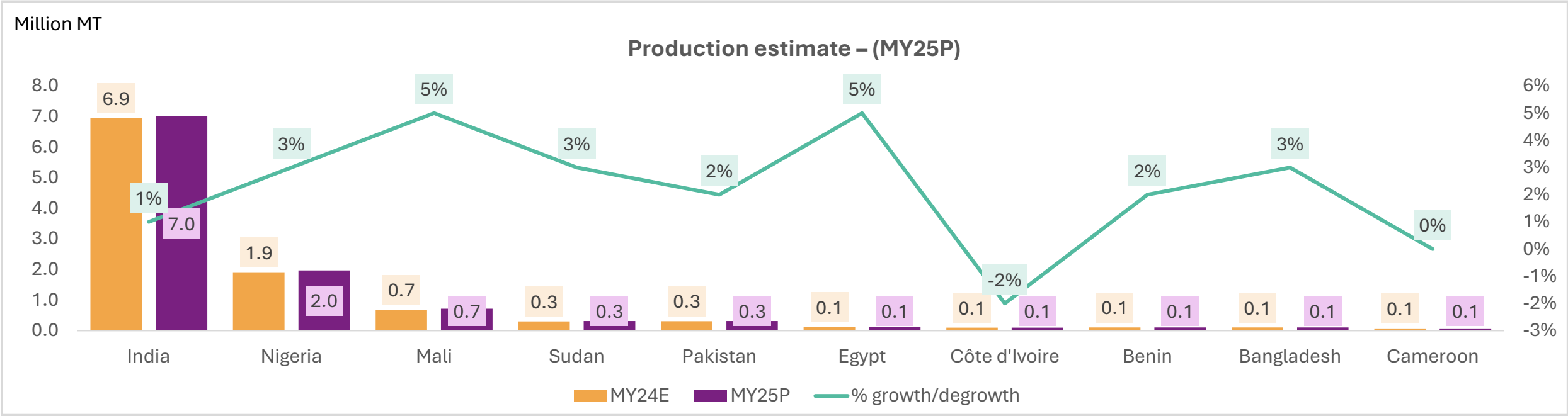
Acreage estimates of major producing countries



P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart contribute to ~96% of global area. For MY25P, global acreage is set to increase by 1-2% YoY led by Mali, Egypt, Nigeria, Sudan, India, Pakistan and Benin while acreage in Cote d'Ivoire to remain lower on year.
- In Sudan, FAO has launched large-scale emergency seed distribution campaign targeting 1.5 million farming households. Since June 2025, FAO and its implementing partners have distributed nearly 1000 metric tonnes of sorghum, millet and okra seeds across Central, West, East and South Darfur States which is expected to increase area under the crop in MY25P.
- In collaboration with World Food Programme, world vegetable center is promoting vegetable cultivation in Mali by ensuring availability and quality of vegetable seeds which is expected to increase area under okra in MY25P.
- In Bangladesh, in districts like Gopalganj and Bagerhat, traditional cultivation method of growing okra is re-emerging, on floating beds made of water hyacinth and bamboo, scaled up during monsoons when fields are submerged. This is aiding in converting waterlogged land into productive zones which is expected to support acreages under the crop.

Production estimates of major producing countries



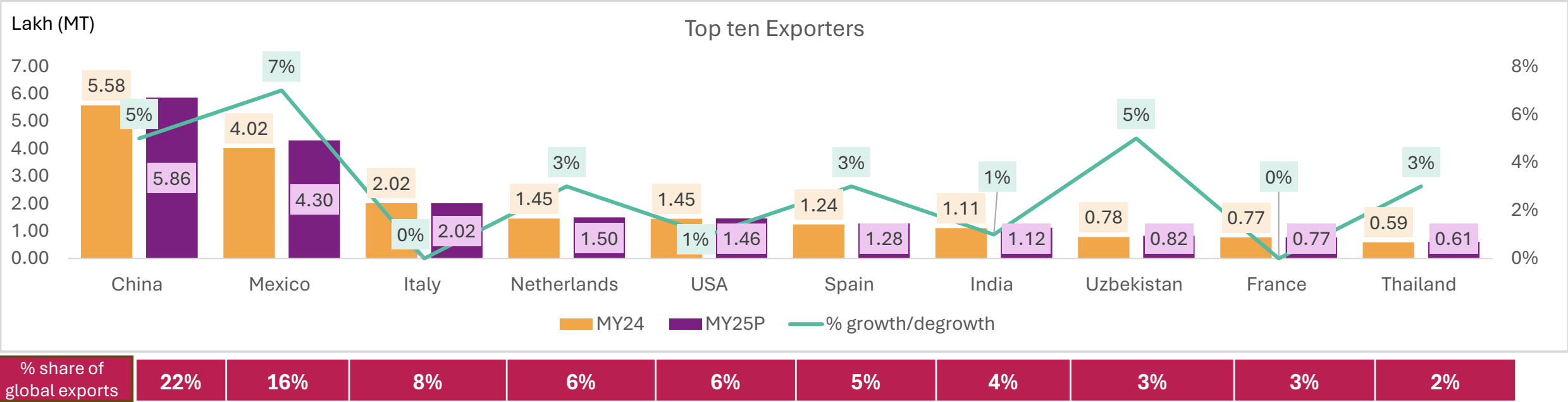
P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart contribute to ~98% of global production. The production for MY25P is expected to moderately improve by 1-2% led by Egypt, Mali, Bangladesh, Benin, Sudan, Pakistan, India and Nigeria while for Cameroon, to remain stable on year.
- In 2025, International Red Cross has provided okra quality seeds in parts of northeastern Nigeria that can grow both in dry and rainy seasons to combat food security challenges. They are also assisting with agriculture equipment and repairing water supply systems which is expected to increase production levels in MY25.
- Initiatives like SafeVeg Project in Benin wherein vegetable seed kit distribution to smallholder farmers for high performing, climate resilient seeds including okra is being witnessed over past one year, is expected to boost both area and production under okra in MY25P.
- Pest pressure, poor extension services and seasonal price trend have impacted okra production in Cote d'Ivoire for last two years which is expected to impact area and production of okra in the country for MY25P.



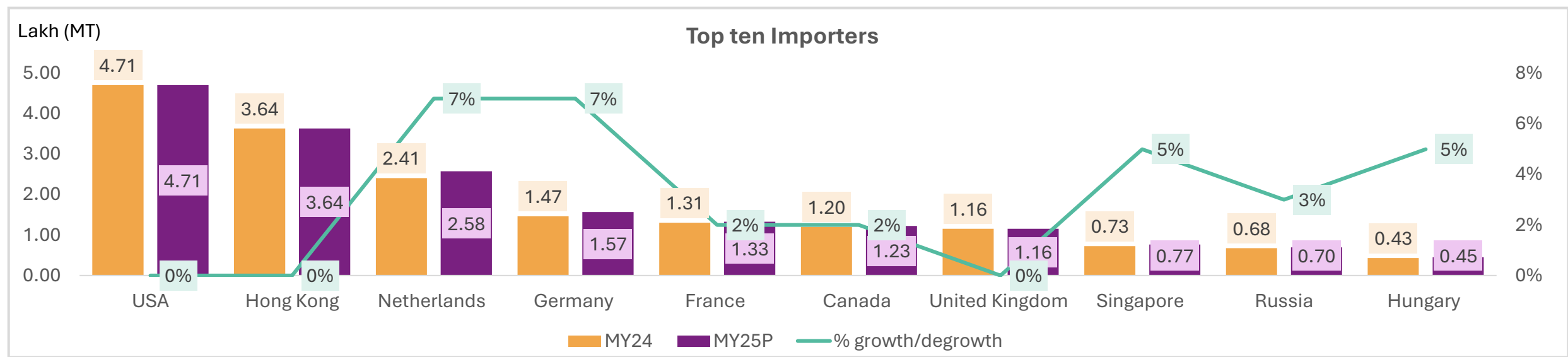
Export trends and price outlook

Major exporters of Okra



- The countries in the chart account for ~76% of global okra exports wherein China is the largest exporter with ~22% of share in global export basket. Global okra exports in MY25P are projected to witness uptrend by 3-4% YoY led by Mexico, Uzbekistan, Thailand, Netherland, Spain and India.
- Mexico exports have grown at CAGR of ~44% (MY20-24) due to growing demand of okra in the key importing country of USA and Canada due to growing demand of plant-based cuisines .
- China has witnessed a CAGR of ~22% in okra exports in past five years (MY20-MY24) driven by demand from USA wherein consumer preference for exotic vegetables, healthy eating trend and okra as snacks is gaining traction and is expected to follow the same momentum in MY25P as well.
- Uzbekistan okra exports have grown at a strong CAGR of ~24% in past five years, with further government impetus on agri exports with a target of \$3.5Bn by 2025 is expected to further support exports under okra as well in MY25P.
- In Spain, the region of Murica in recent years have scaled up in production and exports of okra leveraging their geographical position to European markets. Further demand from countries like UK and Germany to support the exports in MY25.

Major importers of Okra



% share of global exports	19%	15%	10%	6%	5%	5%	5%	3%	3%	2%
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- The countries in the chart account for ~72% of global okra imports.
- Germany’s okra imports are on the rise with growing preference for supplies from Ghana and India over Honduras supplies. Honduran okra with its larger fruit size, fails to meet market expectations while the finer sized produce from Ghana is better aligned with German consumer preferences.
- France is projected to witness uptrend in imports amidst comfortable global supplies, however imports from Honduran (~3% share in import basket of France) to see a downtrend due to erratic climatic conditions and logistical challenges.
- Supplies from Senegal (1-2% share in global export basket) also expected to be impacted for key importers like UK, Spain, Netherland, France and Germany wherein okra acreage shrinkage is witnessed due to high temperature conditions in the past two years impacting okra yield by 10-15%.
- Russian market has now opened for Philippines okra exports as initiated by Department of Agriculture in 2022, which is to support imports in MY25.

Way Ahead for Indian Okra Exports

United Kingdom

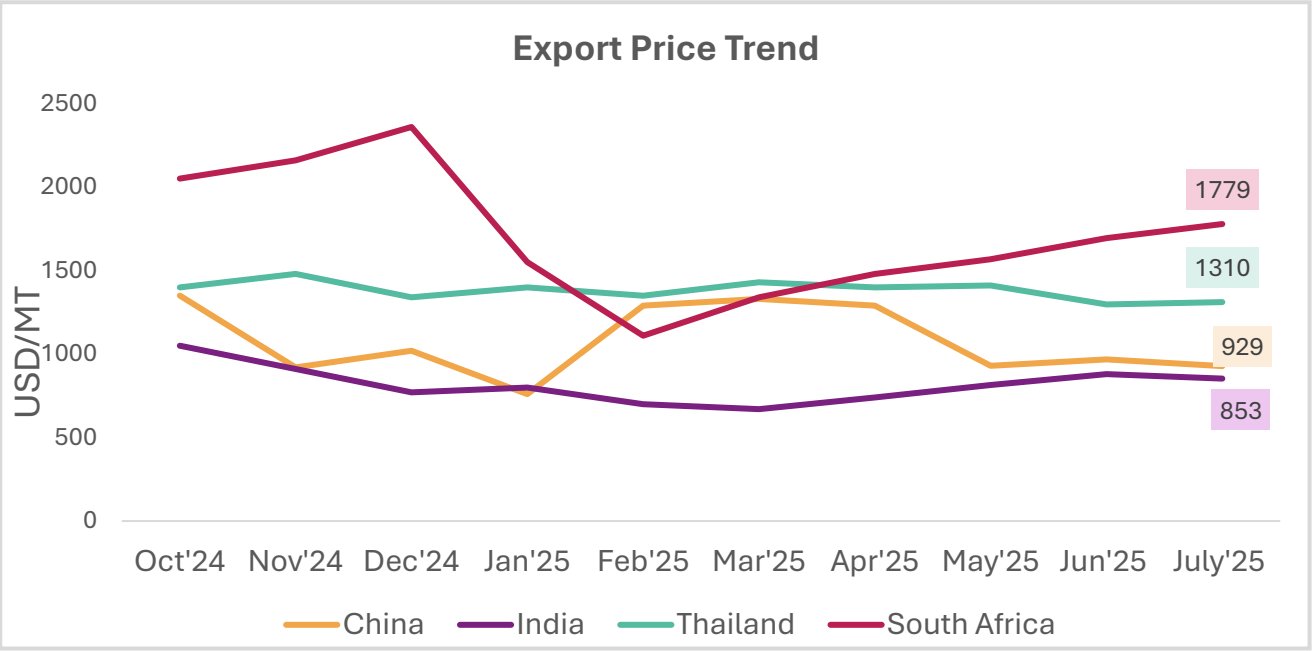
- UK remains a key market with a ~5% share in the global import basket, anchored by multicultural and diaspora demand. India is present in the UK import basket (~5%), particularly through ethnic grocery channels, but scaling into mainstream retail has been limited wherein Indian exports have remained stagnant over past five years (MY20-MY24) largely due to inconsistent MRL (Maximum Residue Limit) compliance and certification gaps. The export trend has remained stagnant over past five years. A significant development in 2025 which is the conclusion of the India–UK Free Trade Agreement is expected to reduce tariff burdens which was ~12% on okra and is also expected to streamline phytosanitary protocols.

Australia

- Australia presents a lucrative niche opportunity for Indian okra through diaspora and specialty retail demand. Australia currently applies 0% tariff on fresh “other vegetables”, making fresh okra duty-free under MFN terms. Significantly, the India–Australia ECTA (Economic Cooperation and Trade Agreement), in force from December 29, 2022, enshrines this 0% status and ensures long-term tariff predictability for okra exporters.
- Additionally, the ECTA includes a structured SPS (Sanitary & Phytosanitary) cooperation mechanism, with provisions for technical consultations and capacity building, which can help resolve import hurdles and expedite clearances in response to biosecurity concerns. In 2024, Indian agricultural exports to Australia rose sharply a 58% increase in H1, led by staples like rice and tea reflecting broader trade momentum post-ECTA implementation. India can target Australia as a niche market, however key operational challenge remains strict biosecurity compliance, a known bottleneck, despite tariff advantages and SPS support structure.



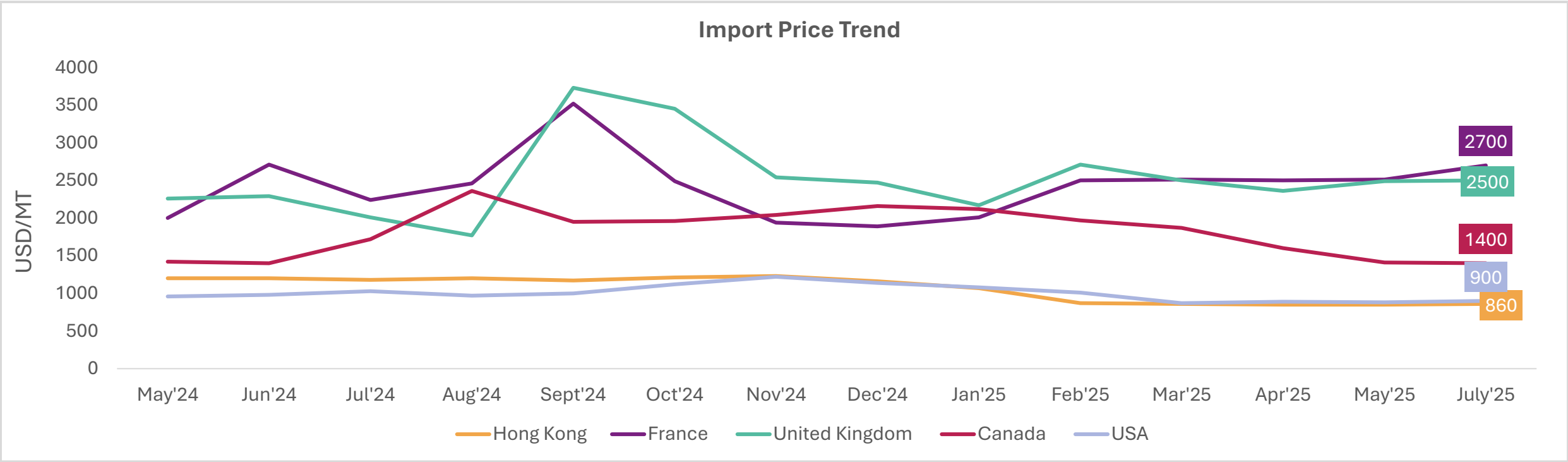
Export prices forecast



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)
China	929	1610	-42%	Bullish	1200-1300
India	853	1780	-52%	Sideways	840-850
Thailand	1310	2050	-36%	Bullish	1500-1600
South Africa	1779	1620	10%	Bullish	1850-1950

- China’s okra export prices have moderated in 2025 and is expected to remain moderate for remaining part of the year, declining from the elevated levels of 2024 where prices peaked in Jan to July at an average 30% higher YoY. This surge was driven by rising demand from markets like Korea, Hong Kong, Malaysia coupled with domestic production constraints stemming from adverse climatic conditions in southern China, where okra cultivation is heavily concentrated which often exposes okra production in the country to climatic variability. Export prices to remain elevated quarter, however lower YoY from a high base.
- Indian export prices for okra were trading lower from Jan-Apr’25 and started raising from May’25 due to growing demand from North America, Australia and UK. Further supply resilience with no major production fluctuations reported so far, prices are likely to remain steady in the coming months.
- With Thailand’s focus on fresh okra exports to key premium okra markets like Japan (~72% of share in total export basket), export prices are relatively higher on year due to increased demand from Japan. Prices are likely to see uptrend in the coming quarter propelled by seasonal surges and export demand
- West African okra exports remain elevated year on year driven by their reputation of year-round suppliers of high quality as well organic okra produce. However, erratic rainfall, rising input costs and pest pressure continue to cause production challenges keeping export prices volatile. The prices are expected to remain bullish in the coming quarter.

Price trends of key importing nations



- Hong Kong’s okra import prices are witnessing lower prices on year due to increased imports from low-cost regional suppliers like China (4-5% lower than average import price of Hong Kong). Rise in imports of frozen okra from China which is relatively cheaper than fresh air freighted okra has further supported downtrend in prices. Further, easier logistics from ASEAN and South China routes have also improved procurement efficiency and eased prices.
- US has also witnessed moderation in import prices backed by improved domestic production in 2025 in southern states like Florida, Texas which has ensured domestic supplies. Further improved imports from Mexico, which is price competitive as compared to other exporters have also kept prices lower on year.
- Countries like France have registered an uptick in prices due to heavy reliance on western African countries wherein production is impacted due to pest pressure and climatic challenges.
- Overall import prices witness a fluctuating trend due to variability of supply from the origin country shaped by climatic conditions and domestic prices and divergence in import mix wherein countries like Hong Kong and USA prefer frozen okra while countries like France and UK continue to rely on fresh.

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.

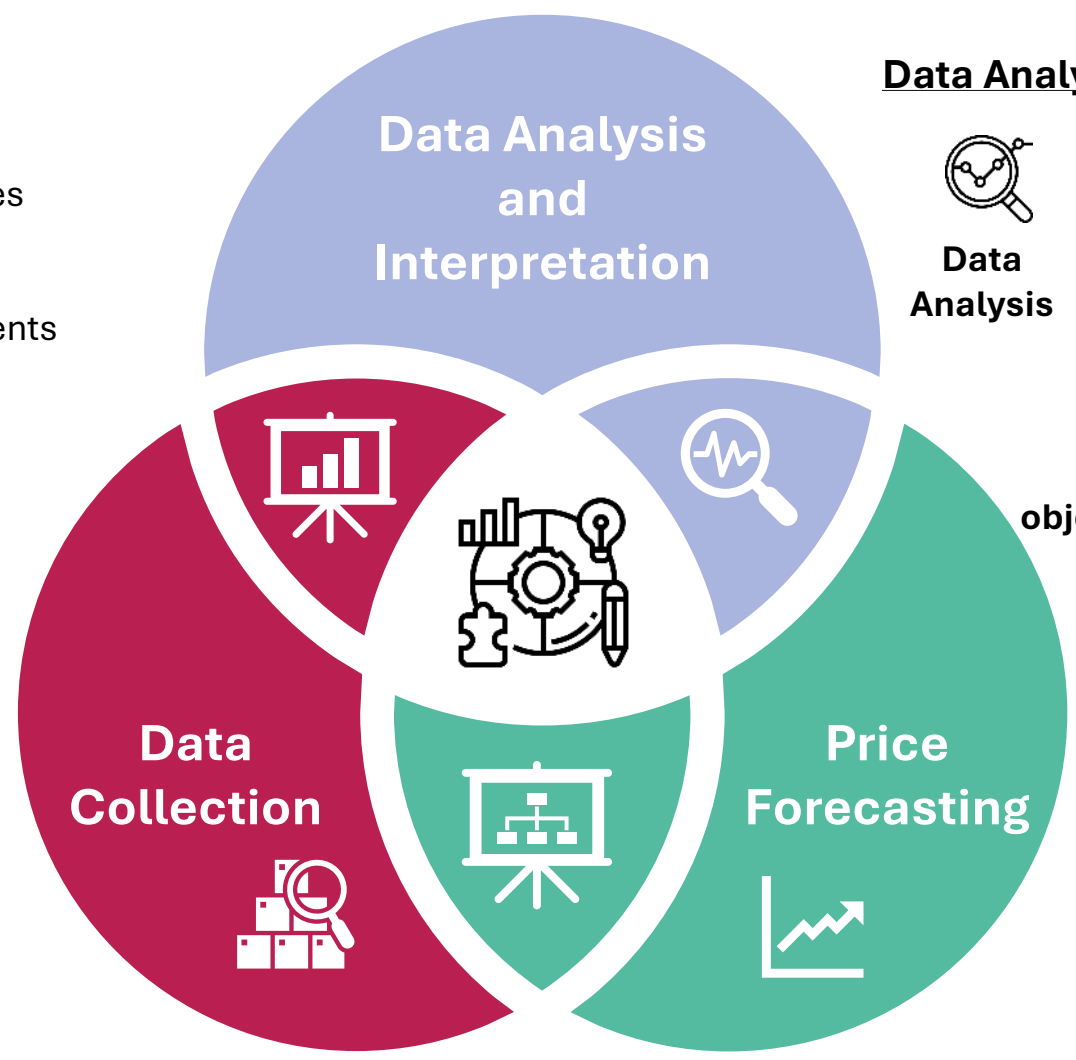
Data Collection

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

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



Data Analysis and Interpretation

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

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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.