

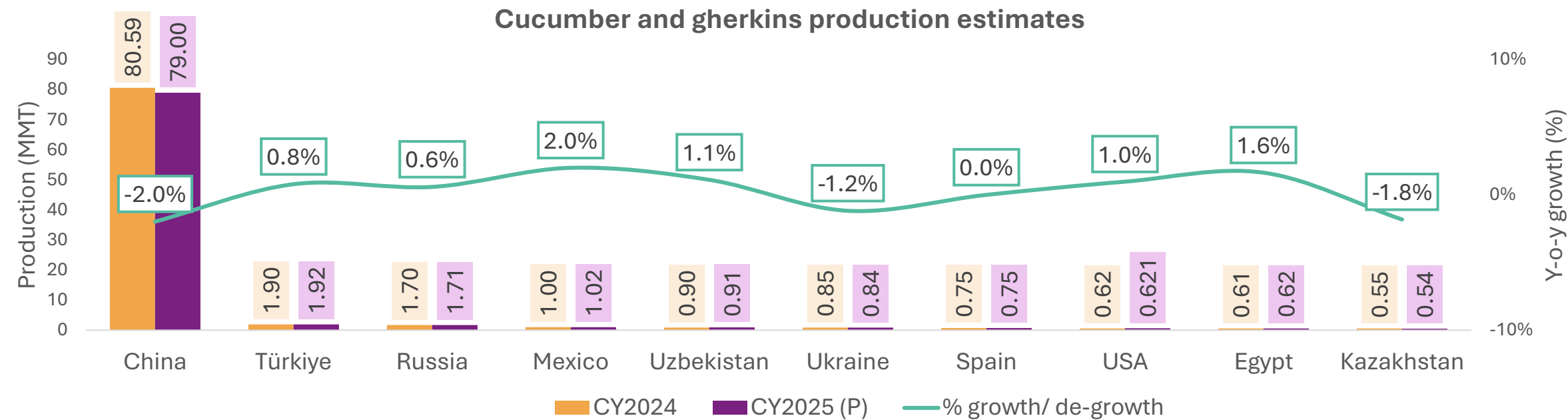
Monthly dashboard - Cucumber & Gherkins Sep-2025



Acreage and production trends



Production estimate of major producing countries



P – Projected value; CY – Calendar year; MMT – Million MT

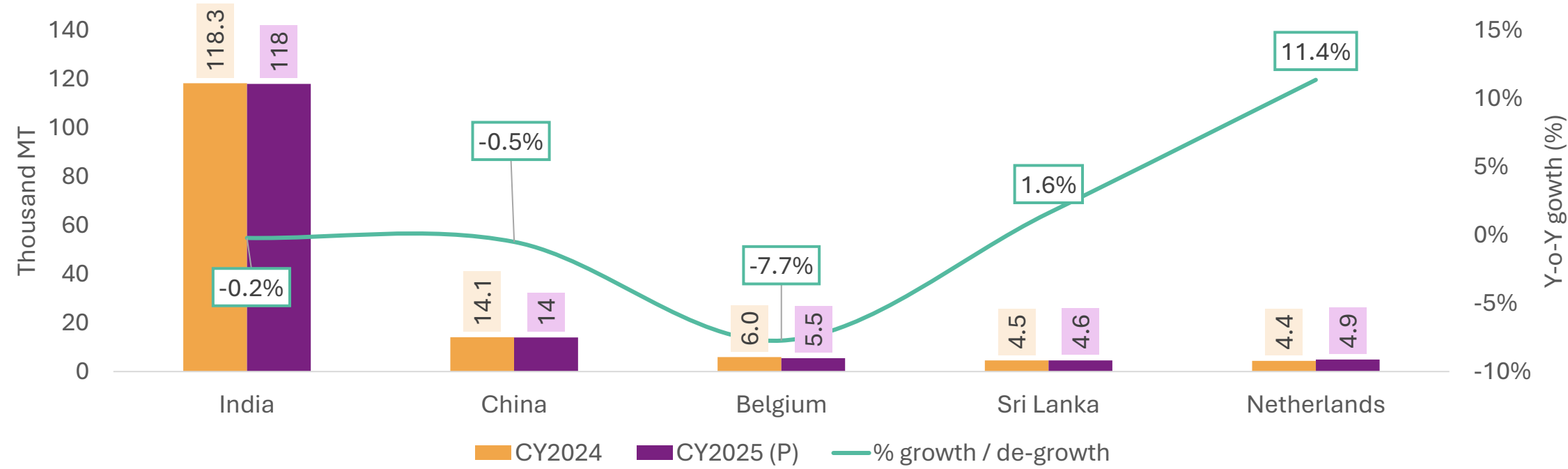
- Top 10 countries **account for ~92% of cucumber & gherkin output; China alone contributes ~83–84%.**
- China’s cultivation area is expected to reduce by 1-2% in CY2025.
- Türkiye, Russia, Mexico, Uzbekistan, U.S. and Egypt show modest CY25 growth from 0.6% to 1.6%. However, in early-mid August 2025, Mexico faced a severe drought condition in northern parts of Mexico that were impacting the production.
- **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 (CAGR 8–9%, CY2020–25).**



Export trends and price outlook

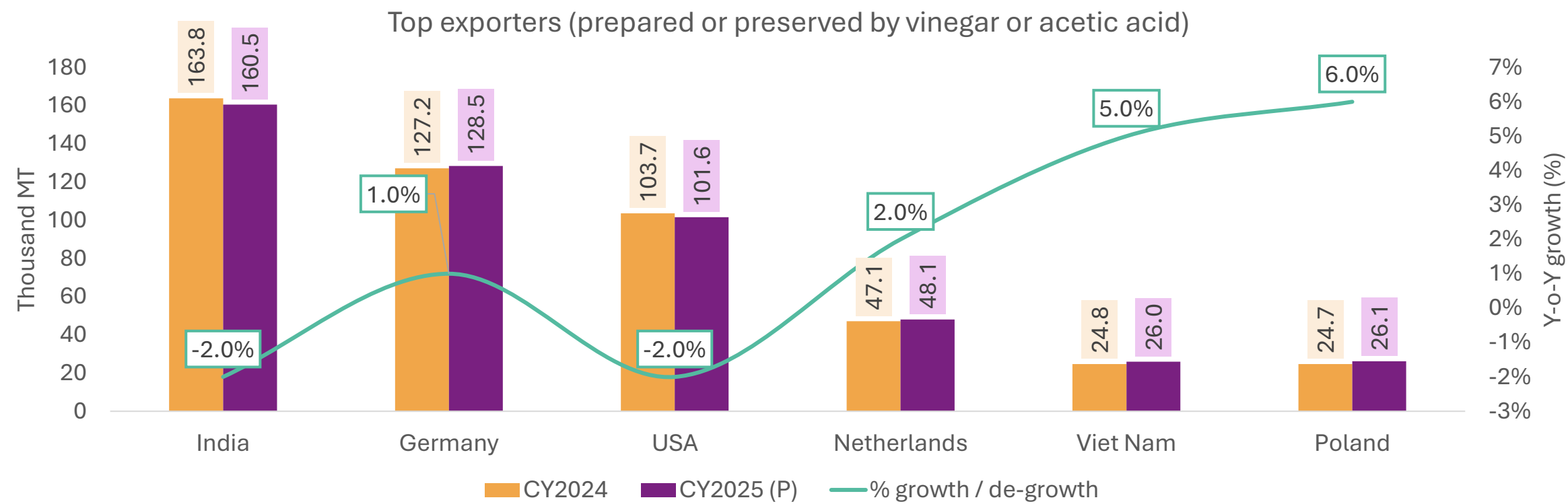
Major exporters of Cucumber and Gherkins

Top 5 Exporters (Provisionally preserved)



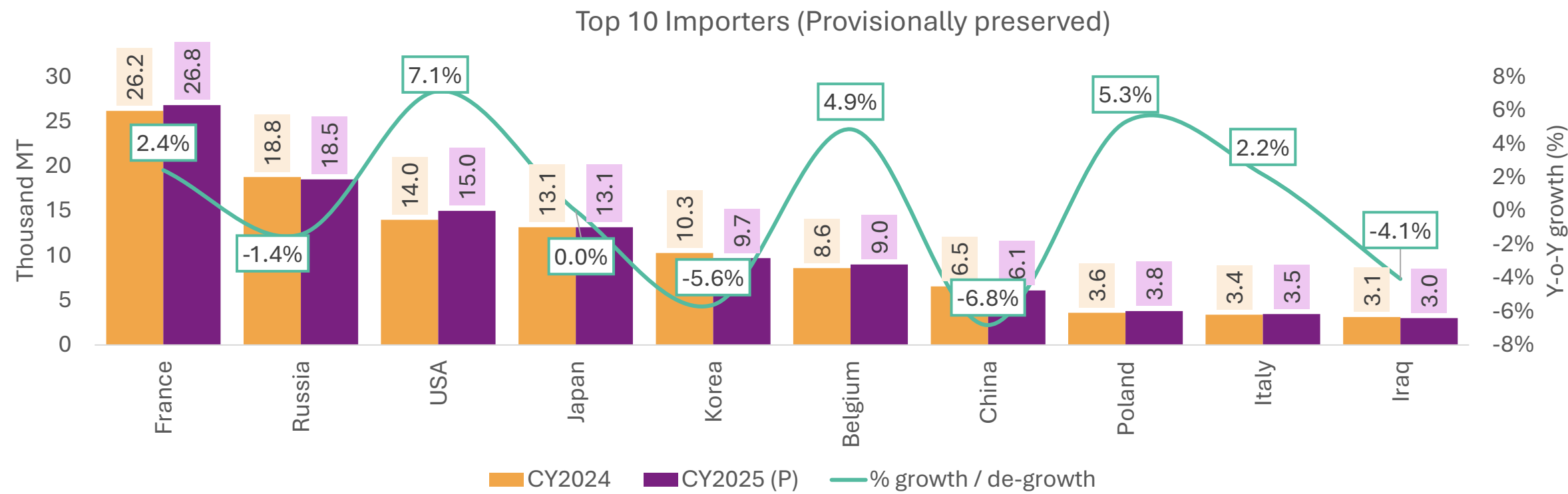
- The **top 5 countries contribute ~90% of global exports of provisionally preserved** cucumbers & gherkins.
- **India leads with ~72% share; however, exports may dip in CY2025 due to U.S. tariffs** (~13% of India’s exports goes to USA, 4th largest destination).
- However, till July 2025, India exports of provisionally preserved cucumbers and gherkins have increased by 4% compared to Jan-July 2024. This is majorly **due to increase in export to Russia, Poland, USA, Netherlands, Croatia and Germany**.
- **Among re-exporters, Netherlands expected to grow**, driven by rising demand from the UK and other EU markets, with H1 CY2025 exports growing by 43% over H1 CY2024.

Major exporters of Cucumber and Gherkins



- The countries shown **account for ~80% of global exports of cucumbers & gherkins preserved in vinegar.**
- **India leads with ~30% share.**
- India’s exports are expected to dip by about 1–2% in CY2025, largely due to steep U.S. tariffs (with the U.S. accounting for nearly 30% of India’s shipments, making it the largest destination). However, demand growth in the EU is likely to cushion part of this impact.
- Till July of CY2025, India’s export of cucumber and gherkins preserved by vinegar or acetic acid, has increased by 34% compared to Jan to July CY2024. The majorly attributed to increase in export to Germany, USA, Canada, Russia and Iraq.
- **U.S. exports are also projected to decline, with H1 CY2025 shipments already 14% lower than H1 CY2024.** The fall is driven by reduced exports to Canada—its largest market, accounting for 77% of U.S. exports in H1—where volumes dropped 17% in the same period.

Major importers of Cucumber and Gherkins



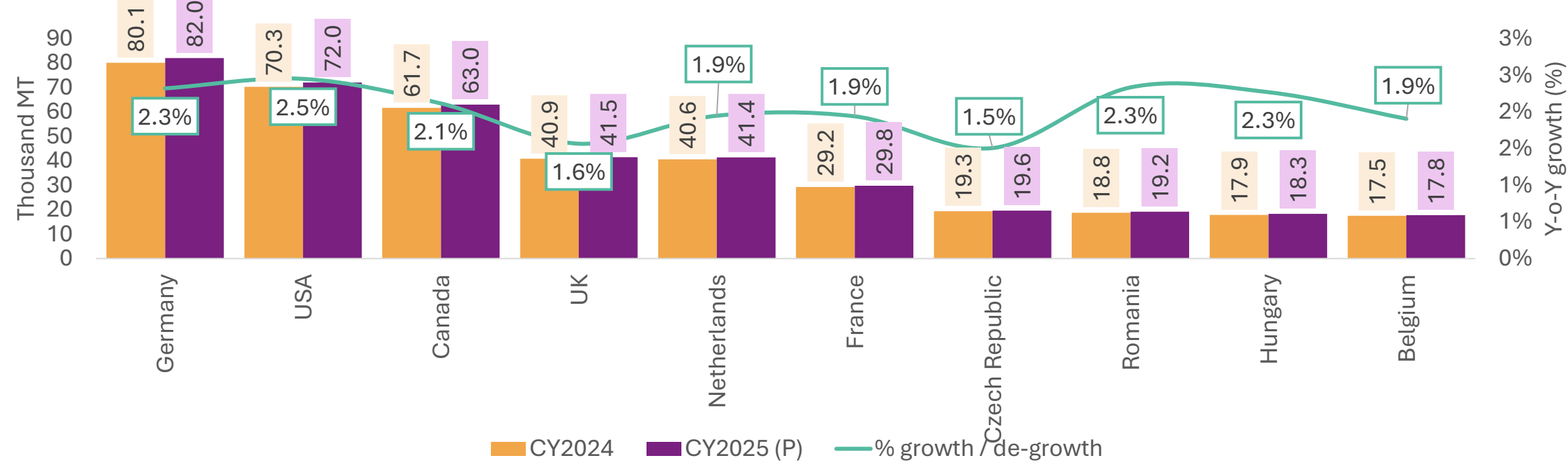
- The countries shown in the chart **collectively account for ~75% of global provisionally preserved cucumber and gherkins imports.**
- **EU accounts for >60% of total global imports** by value of provisionally preserved gherkins. Volume growth is expected to rise ~5-10% YoY in CY25 after a strong H1 (imports volume across EU hubs were already up 22% over H1 2024) due to increased demand.
- **South Korea and China’s import is expected to drop by 5-15% in CY2025** as their H1 imports are 23% and 65% lower, respectively, compared to H1 of CY2024. South Korea’s import has been declined due to 61% reduction in export from India.

P – Projected value; CY – Calendar year

Source: ITC trade map

Major importers of Cucumber and Gherkins

Top 10 Importers (Prepared/ preserved by vinegar)



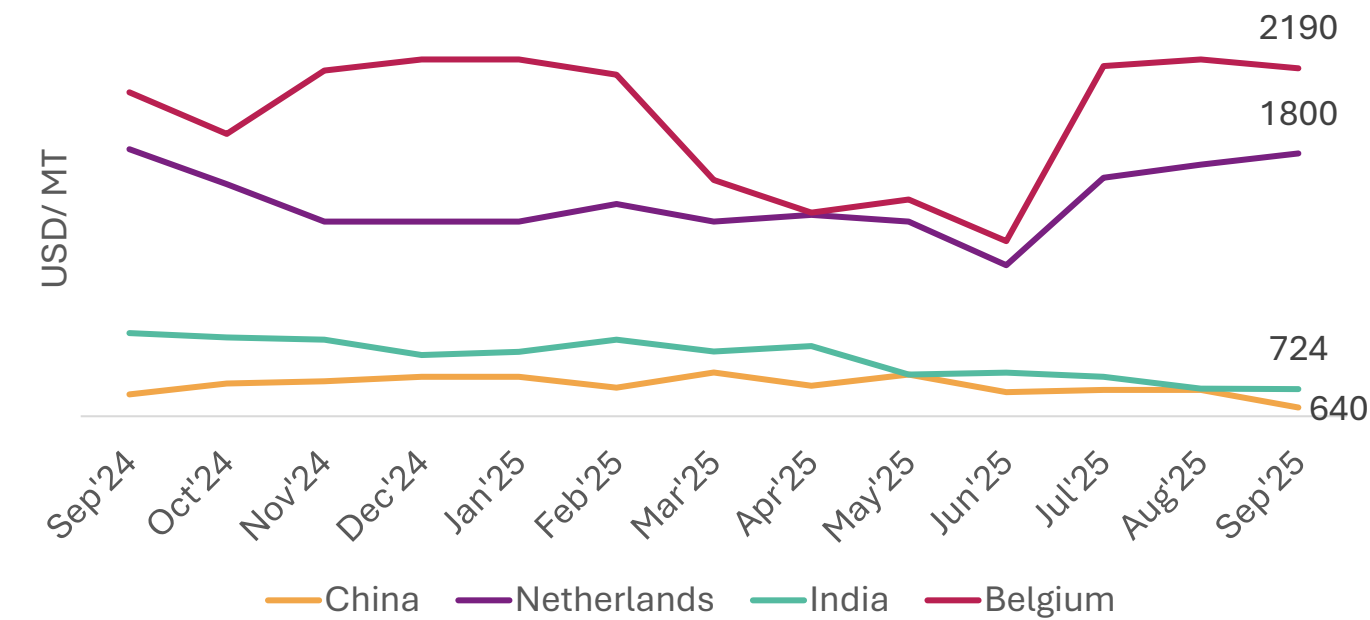
- The countries shown account for ~60% of global imports of cucumbers & gherkins preserved in vinegar.
- **Global import volumes expected to rise slightly in CY2025**; EU makes up 55–60% of global import value for RTE products.
- **Mexico's cucumber** shipments to the US through California and Texas are **declining**, with 11/9 bushel cartons of medium cucumbers priced between **USD14-15**, down slightly from earlier levels. The decline is due to **light border crossings, drought**, and a **seasonal transition**, prompting US buyers to source alternatives from **Florida, Canada**, or import **value added cucumbers** from **India**.
- EU demand also set to grow marginally, offering opportunities for Indian exporters.

P – Projected value; CY – Calendar year

Source: ITC trade map

Export prices forecast – Fundamental analysis

Export price trend (Provisionally preserved)

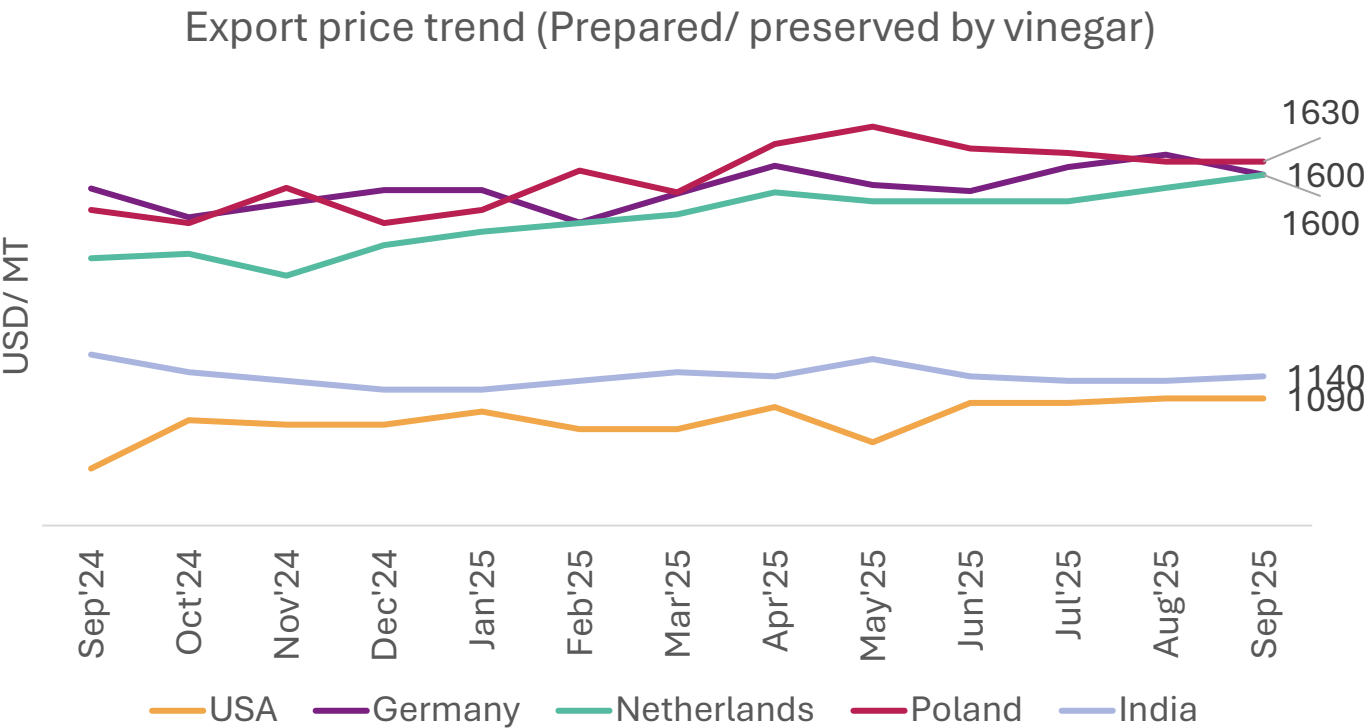


Price outlook for next three months (OND)*					
Countries	Sep'25	Sep'24	Change over year	Price direction	Forecasted Average price range for OND*
	Price	Price	change		(USD/MT)
	(USD/MT)	(USD/MT)			
China	640	700	-9%	Sideways	640-660
Netherlands	1800	1820	-1%	Bearish	1700-1800
India	724	980	-26%	Sideways	730-750
Belgium	2190	2080	5%	Bearish	2000-2100

Note: Price forecasting is based on the fundamental analysis. *
*OND stand for October, November and December

- **China’s production for MY25 is expected to decline marginally by 1-2%.** Prices likely to hover in the range of 640–660 USD/MT with marginal upward bias due to marginal decline in production and rising logistics costs and tighter quality norms.
- Indian prices steadied in H1 2025; exporters face higher freight and input costs – moderate increase in price is expected as demand in EU countries is likely to surge in next 3 months
- Overall global export prices are likely to remain marginally less in the upcoming quarter.

Export prices forecast – Fundamental analysis



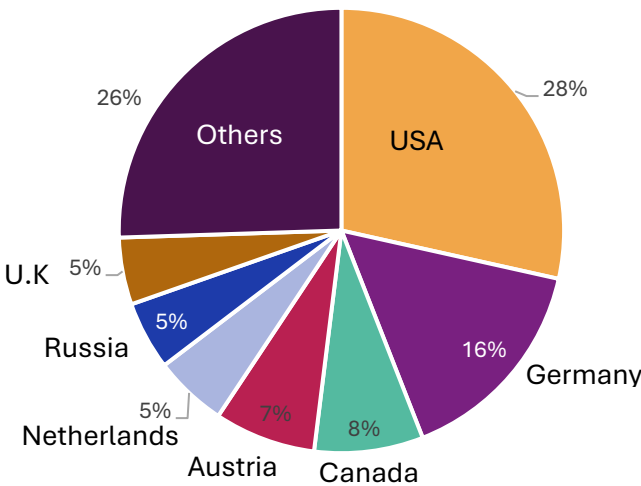
Price outlook for next three months (OND)*					
Countries	Sep'25 Price	Sep'24 Price	Change over year	Price direction	Forecasted Average price range for OND*
	(USD/MT)	(USD/MT)	change		(USD/MT)
USA	1090	910	20%	Bullish	1090-1100
Germany	1600	1608	-0.5%	Sideways	1590-1620
Netherlands	1600	1500	7%	Bullish	1670-1720
Poland	1630	1480	10%	Bullish	1700-1730
India	1140	1160	-2%	Sideways	1130-1150

Note: Price forecasting is based on the fundamental analysis.
*OND stand for October, November and December

- **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 1590-1650 USD/MT range**, supported by premium demand and controlled supply.
- Indian export prices are expected to remain at 1130–1150 USD/MT range, due to USA tariff implementation.
- US domestic production is expected to increase marginally by 1-2% in MY25, demand from processed food and foodservice remains consistent and trade tensions with high tariffs keeping the market unpredictable and **pries are likely to remain firm in the upcoming quarter around 1090-1100 USD/MT**

India's Strategy to Penetrate in the German market

India's Export Basket (CY2024) – Basis export value



Source: DGCIS

HS Code: 20011000(Cucumbers & Gherkins, Prepared/Preserved By Vinegar)

Germany's Import analysis

Supplier	Share in import basket (%)	Unit Price (USD/MT)
Turkey	46%	1306
India	34%	1267
Poland	7%	1208
Serbia	6%	1424
Netherlands	2%	2193
Others	5%	

Source: ITC trade map

- While India being the top exporter of cucumber and gherkins globally (~164 Thousand MT), still has room to improve and cater the European market.
- India caters ~34% of Germany's imports at a much competitive price of USD 1267, as compared to the aggressive price of Turkey, USD 1306.
- **Opportunity for India:** India can surpass Turkey synchronizing staggered crop cycles with protected cultivation, strengthening processing and cold-chain systems, and ensuring EU standard certifications (IFS/ BRC/ HACCP/ EU Organics) and traceability. This will enable consistent, high quality year-round supply aligned with Germany's demand, helping India move beyond its current 34% share and challenge Turkey's dominance in the European market.

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



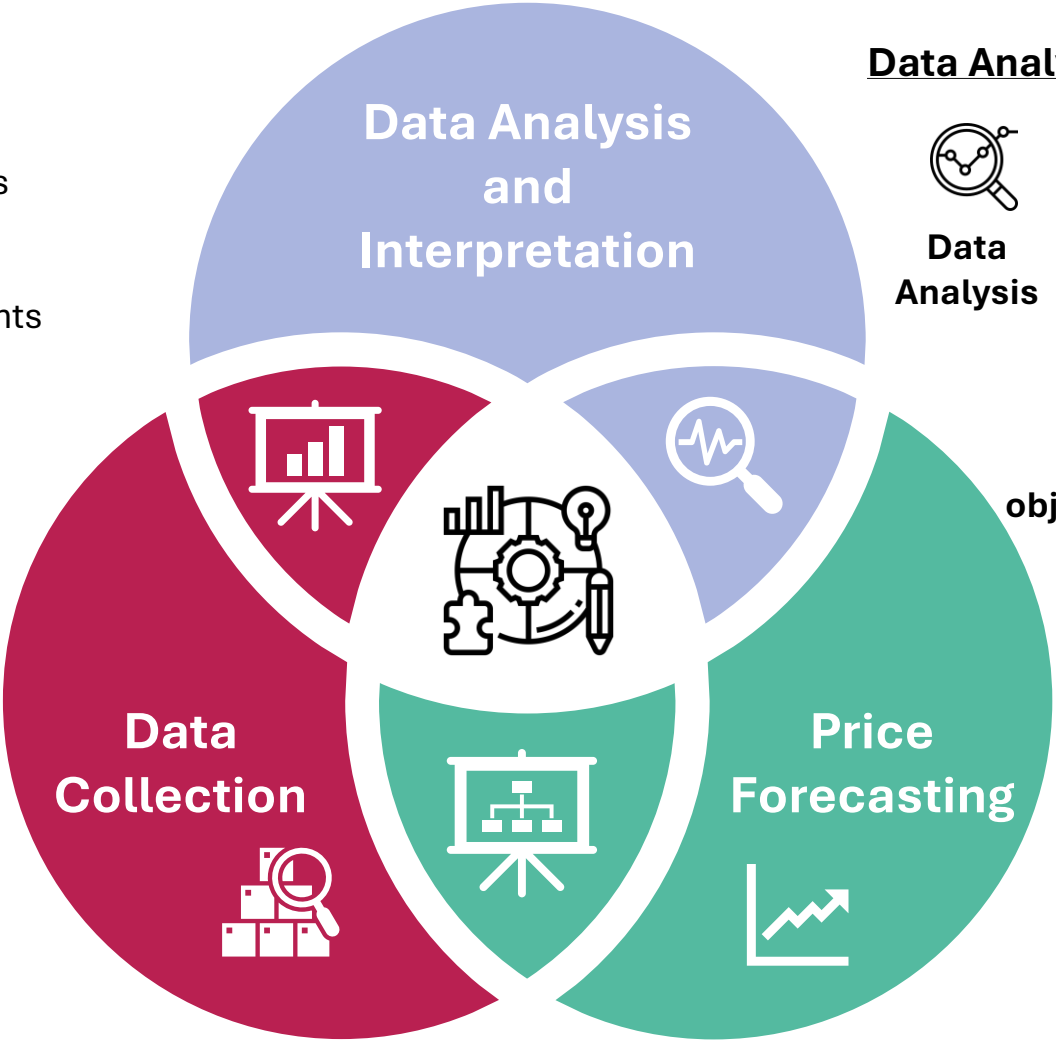
Sources

- 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.