Monthly dashboard – Potato

Aug 2025

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			Sowing	Sowing		Harvesting	Harvesting					
	South (Autumn)								Sowing	Sowing		Harvesting	Harvesting
	South (Winter)			Harvesting	Harvesting							Sowing	Sowing
India	Rabi	Harvesting	Harvesting	Harvesting							Sowing	Sowing	Sowing
Ukraine	Main				Sowing	Sowing			Harvesting	Harvesting	Harvesting		
Russia	Main				Sowing	Sowing			Harvesting	Harvesting			
USA	South	Sowing	Sowing			Harvesting	Harvesting						
	North				Sowing	Sowing			Harvesting	Harvesting	Harvesting		
Germany	Main			Sowing	Sowing			Harvesting	Harvesting	Harvesting			
Bangladesh	Main	Harvesting	Harvesting	Harvesting							Sowing	Sowing	Sowing
France	Main			Sowing	Sowing			Harvesting	Harvesting	Harvesting			
Poland	Main				Sowing	Sowing			Harvesting	Harvesting	Harvesting		
Netherlands	Main				Sowing	Sowing			Harvesting	Harvesting	Harvesting		

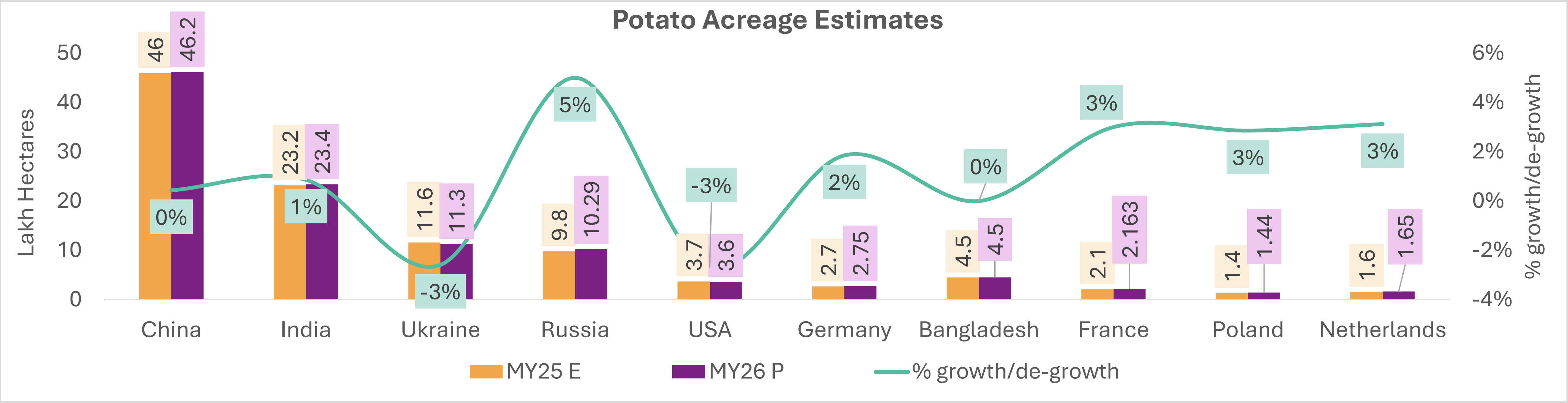
- Potato cultivation is predominantly concentrated in a single winter season across most countries, with the notable exceptions of China and the United States. In regions such as India, Bangladesh, and parts of China, the harvesting period largely overlaps, typically falling between January and March.
- 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	

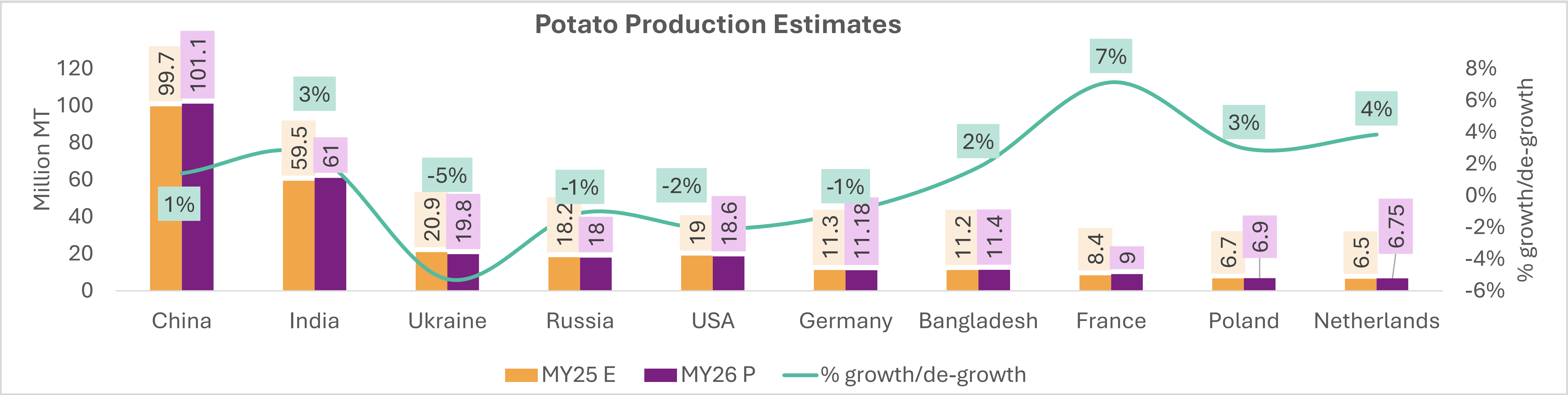
Acreage Estimates of Major Producing Countries



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 projected to expand.
- However, 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. USDA, National Agricultural Statistics Service (NASS) 2025 forecasts potato planted acreage in the top 13 potato-producing states to be 912,000 acres, a 2% reduction on year.
- The **EU potato acreage expects a rise by 5.5%** to a record 1.47 million hectares in MY26.
- China's Sichuan province, one of the key producing area is estimated to have stable acreage on year wherein **new high yielding potato varieties with yellow skin** have gained traction this year.
- First estimates of the field study carried out by the National Union of French Potato Producers (UNPT) in **France shows a sharp growth in area under potatoes** (both processing and fresh acreages), excluding early planted varieties in 2025.

Production Estimates of Major Producing Countries



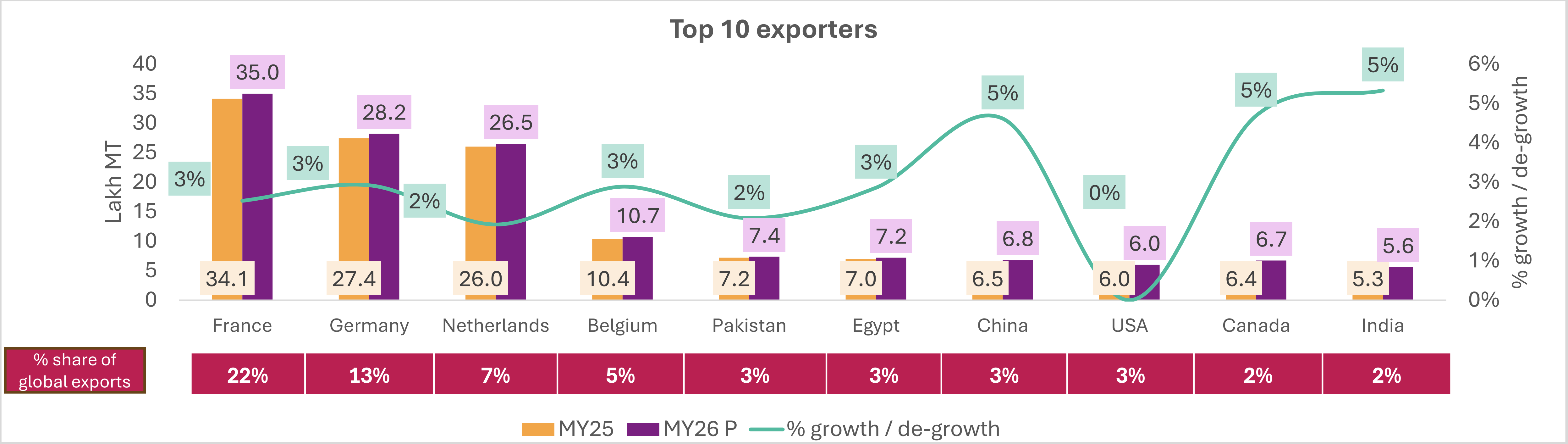
P – Projected value; MY – Marketing year (Aug-Jul)

- 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.**
- **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
- France production is likely to reach 9 MMT in MY26 higher by 7% against MY25. This is expected to be the richest harvest in a decade with average yield increasing by 5-7% supported by increased acreages under the crop.
- 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.
- Potato production in Ukraine is set to decline due to spring frosts during the sowing season and acute labor shortages from the prolonged war. With harvest starting in August, high storage and logistics costs are expected to keep market prices elevated year-on-year.

Source : 1 Deutsche Welle, 2025

Export trends and price outlook

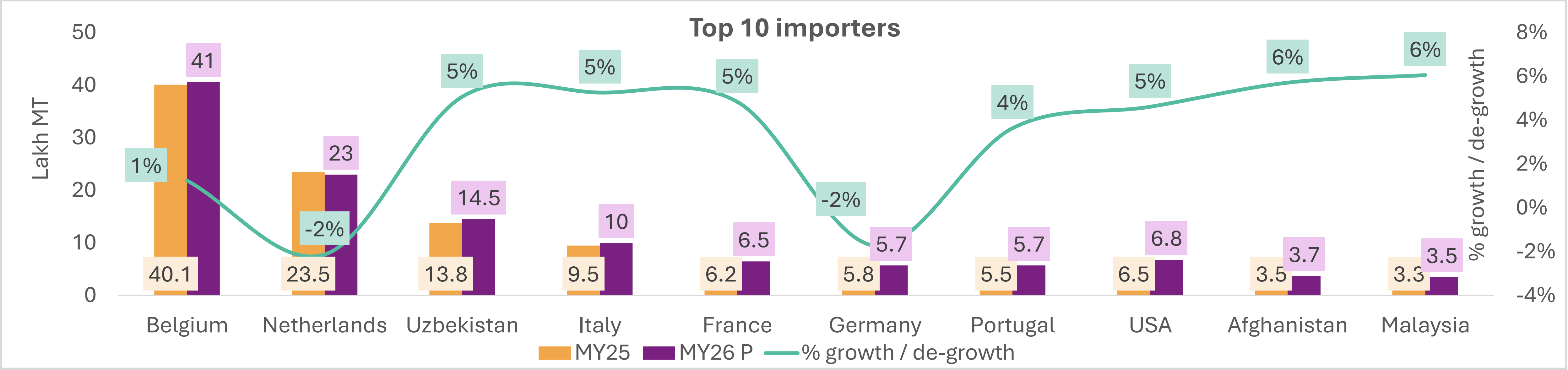
Major Exporters of Potato



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

- The countries in the chart **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**.
- EU exporters are reportedly facing price competitiveness in middle east and southeast Asian region from India wherein Indian average export prices are 30-40% less than EU exporters like France and Netherlands.
- French exports in early 2025 faced weak demand and high inventories, however improved orders from eastern European buyers such as Poland and the Czech Republic, especially for brushed varieties with less competition, are helping ease domestic supply pressures.
- 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.

Major Importers of Potato

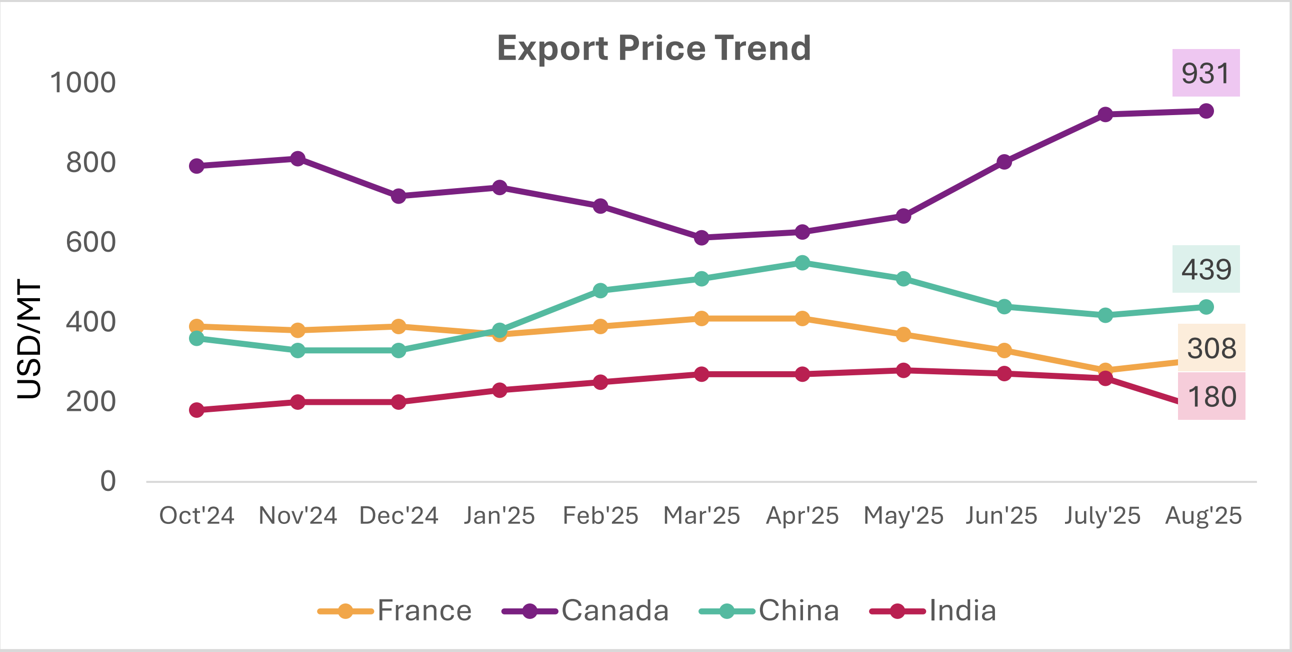


% share of global imports	22%	13%	7%	5%	3%	3%	3%	3%	2%	2%

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.** Canada has already sent 980 tones of potatoes to Indonesia in 2025.
- **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%.**
- Netherland has witnessed increased acreages under table consumption potatoes around 8-9% more than 2024, highest hike since 2000 which is to support exports and lower import volumes for the country.

Price Trends of Key Exporting Nations

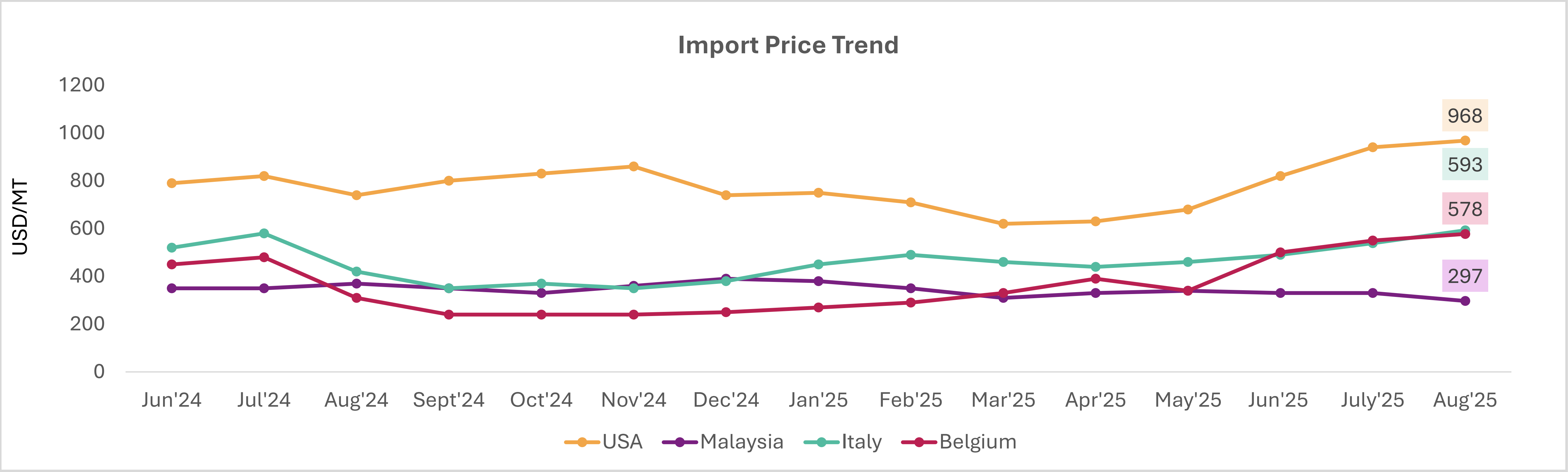


Price outlook for next quarter (SON)					
Countries	Aug'25 Price (USD/MT)	Aug'24 Price (USD/MT)	%age change	Price direction	Average price range for SON (USD/MT)
France	308	410	-25%	Bearish	280-305
Canada	931	721	29%	Bearish	820-850
China	439	390	13%	Bearish	350-370
India	180	240	-25%	Sideways	180-200

- Following a record harvest in France, potato export prices have fallen by 25%, dropping from $410/MT in Aug '24 to $308/MT in Aug '25. Ample domestic stocks, coupled with imports from China, have kept prices subdued year-on-year and they are expected to remain under pressure in the coming months.
- **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 new crop arriving at market, prices are expected to soften moderately until processing demand from US picks up.
- **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 soften with high domestic production backed by fresh winter crop arrivals**
- **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. SON stand for September, October and November , Above prices are FOB

Price Trends of Key Importing Nations



- US fresh potato import prices surged to $960–970 per metric ton in August 2025, driven by higher Canadian production costs caused by weather-related yield reductions. Strong US demand, coupled with domestic supply shortages, tariff impacts, policy uncertainties, and a stronger US dollar, further supported the price increase.
- 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 soften in August 2025.
- Italy import prices witnessed an uptrend in the early half of 2025 due to tight supply and lower carry over stock, however amid EU record harvest in 2025 price are expected to ease.
- Increased processing activities in Belgium and Italy have prompted buying in August 2025 keeping prices elevated on year in MY2025.

Source: ITC trade map, HS code 0701

Way Ahead for Indian 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

Way Ahead for Indian Exports

Opportunities for Indian Potato Exports - Long Term

Russia

- **Russia** –Import of potatoes have grown at a CAGR of ~7%,(MY20-MY24) with **peak demand for Asian potatoes during April–June.** Backed by the growing demand, imports from China into Russia have increased nearly tenfold in recent years.
- Currently, **India faces export restrictions to Russia due to quarantine pests such as Ralstonia solanacearum (brown rot) and the potato tuber moth detected in past Indian consignments. Russia mandates ELISA reagent testing, for which India's current laboratory infrastructure is inadequate.**
- Addressing SPS (Sanitary and Phytosanitary) concerns through improved detection systems, better traceability, and alignment with international standards could unlock significant export potential.

Uzbekistan

- **Uzbekistan is the third-largest market for potatoes** in terms of volume, accounting for ~32% of the global export share.
- Over the past few years (MY20–MY24), the market has experienced a growth of around 33%.
- Despite local production, domestic supply does not fully meet demand, creating opportunities for imports However, India needs to establish logistic corridors for the same.
- Additionally, India can leverage its off-season harvesting advantage (February–April), which coincides with the planting season in Uzbekistan, to strengthen its export presence

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.

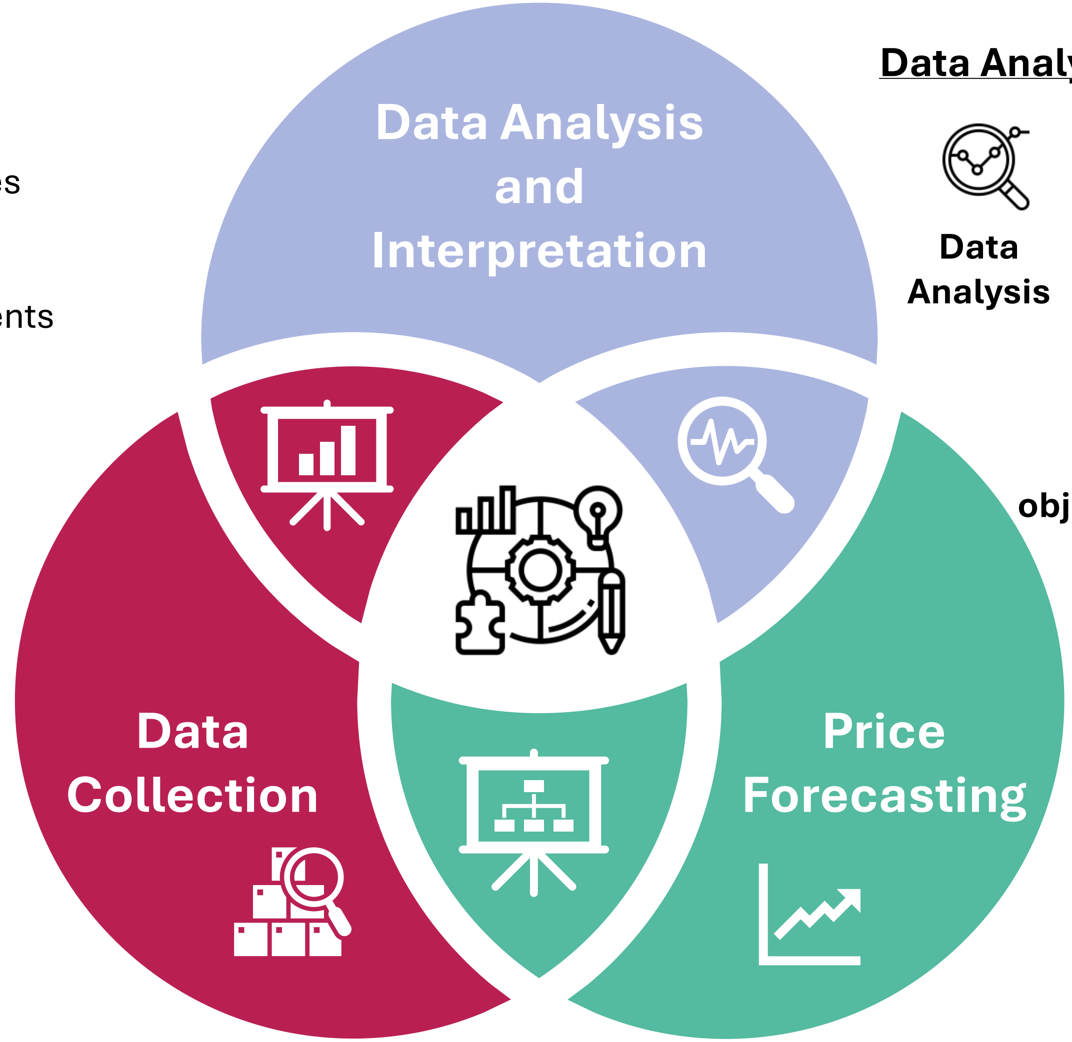
Data Collection

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.