Crisil
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APEDA

Monthly dashboard- Potato

Sep-2025

Acreage and production trends

Potato Crop Calendar of Major Producing Countries

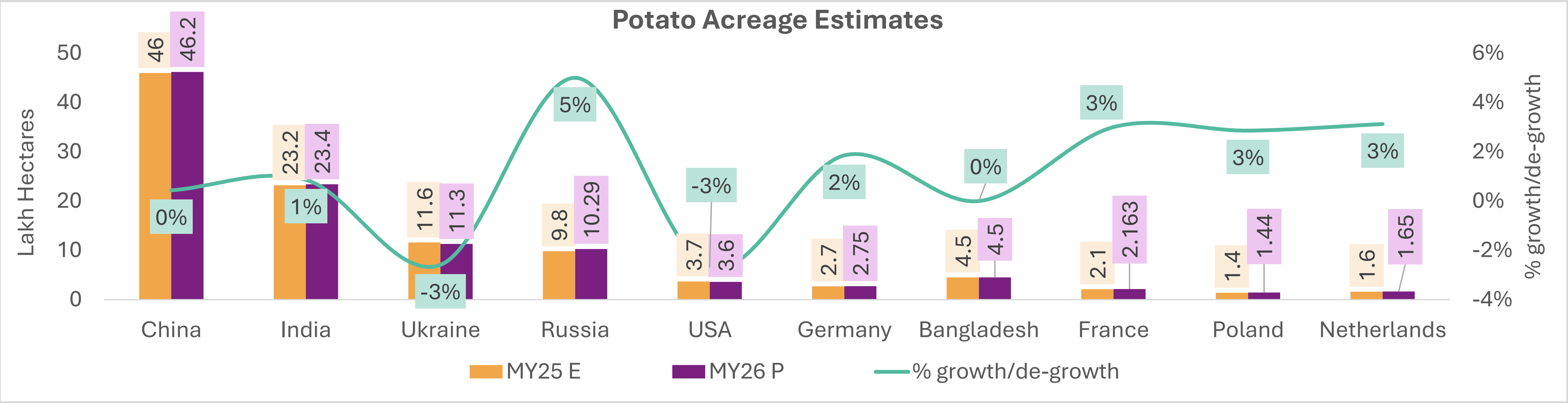
Countries	Season	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China	North			Sowing	Sowing		Harvesting	Harvesting					
	South (Autumn)								Sowing	Sowing		Harvesting	Harvesting
	South (Winter)			Harvesting	Harvesting							Sowing	Sowing
India	Rabi	Harvesting	Harvesting	Harvesting							Sowing	Sowing	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	

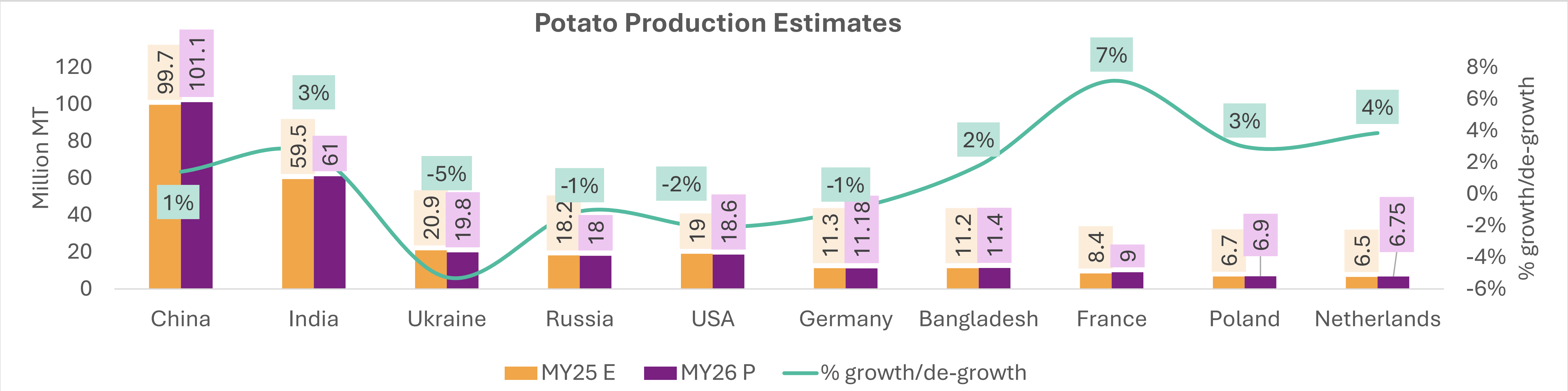
Acreage Estimates of Major Producing Countries



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

- The countries highlighted in the chart **account for nearly 68% of the world's potato acreage**, with global potato acreage expected to marginally **improve by ~1%, 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% 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).

Production Estimates of Major Producing Countries



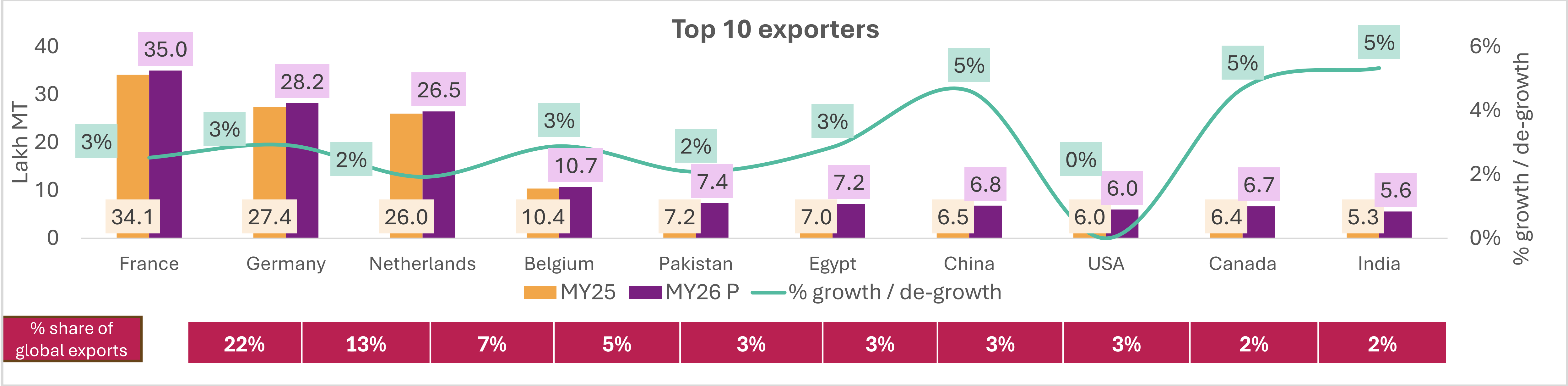
P – Projected value; MY – Marketing year (Aug-Jul)

- 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% over** MY25. This is expected to be the richest harvest in a decade with average yield increasing by 5-7% coupled with 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

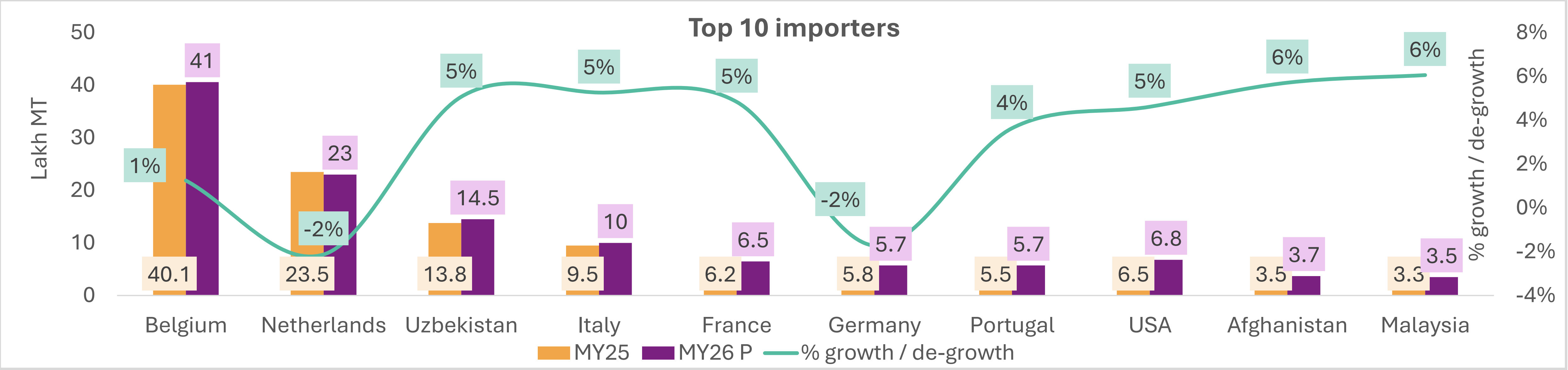
Major Exporters of Potato



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

- The countries in the chart **account for ~80% of global exports**, with global exports for MY26 expected to increase by 2-3% on year.
- **The EU remains the largest global supplie**r of fresh potatoes, led by France, Germany, Belgium, and the Netherlands.
- **French exports are expected to improve** due to increased orders from eastern European buyers, particularly for brushed varieties.
- **India, China, and Egypt are projected to increase exports on year in MY26**, driven by higher production prospects and improved demand from the processing industry, particularly in the French fries market. Gujarat remains a key export hub, with districts like Banaskantha, Sabarkantha, and Araval catering to growing demand from frozen food processors and quick-service restaurants.
- China witnessed strong momentum in **Russian markets**, with exports volume up 4.2 times YoY (Jan-Sep).
- Pakistan: strong production levels expected to support potato exports in MY26, with fresh table exports and industrial processing varieties in demand.
- **USA exports are expected to remain largely stable**, with nominal traction in fresh and frozen potatoes, but poor momentum for dehydrated potatoes, potato chips, and seed potatoes.

Major Importers of Potato

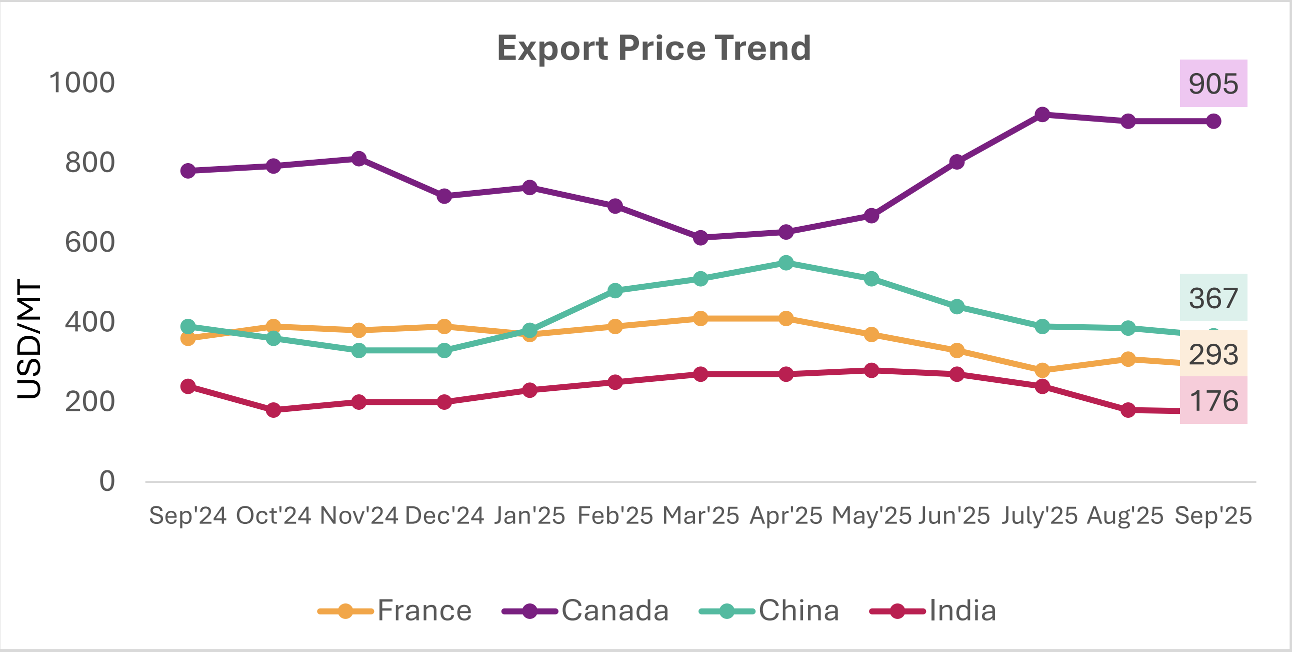


% share of global imports	22%	13%	7%	5%	3%	3%	3%	3%	2%	2%

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, for **Malaysia** which relies on imports to supplement weak domestic output, **MY26 imports are projected to remain higher by 5-6%.** Malaysia has witnessed sustainable increase in imports from Egypt wherein the country's share has grown from 0.5% in 2024 to 1.5% in Malaysian import basket.
- **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



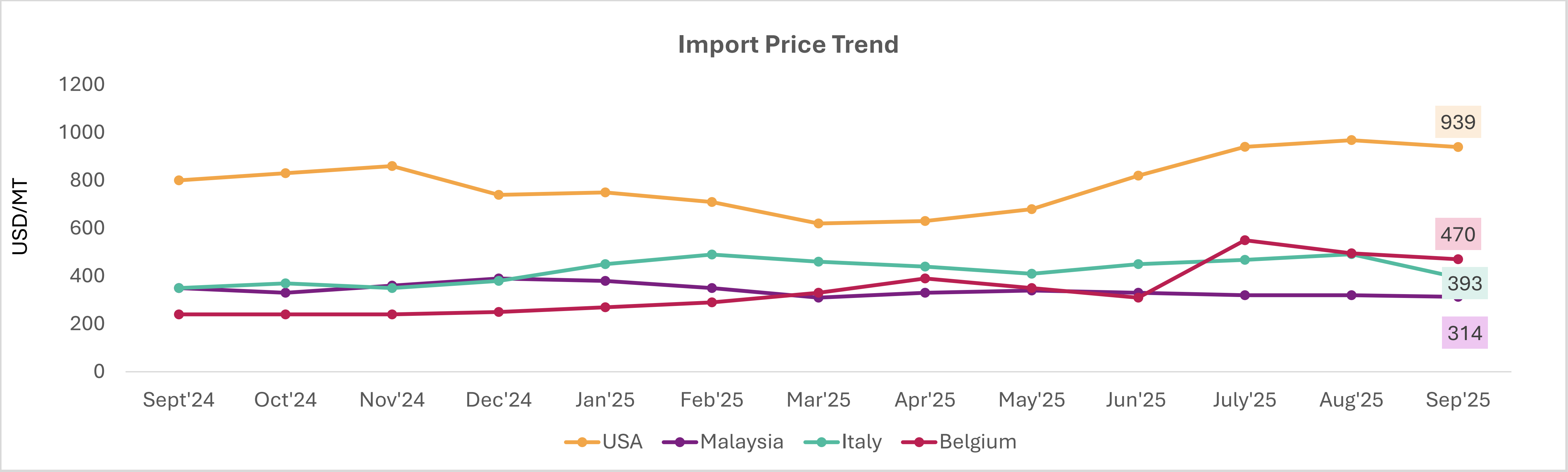
Price outlook for next quarter (OND)					
Countries	**Sep'25 Price (USD/MT)**	**Sep'24 Price (USD/MT)**	**%age change**	**Price direction**	**Average price range for OND (USD/MT)**
France	293	360	**-19%**	**Bearish**	270-277
Canada	905	781	**16%**	**Bearish**	800-850
China	367	390	**-6%**	**Bullish**	385-410
India	176	240	**-27%**	**Bullish**	180-195

- With expanded area under potato in Europe, production in countries like Germany, France, Belgium, Netherlands has exceeded the processing industry's contractual capacity, with large additional volumes produced outside contracts (free buy). These free-buy potatoes spilled over into the open market, causing an even sharper price collapse YoY.
- Following a record harvest in France, potato export prices have fallen by 19%, dropping from $360/MT in Sep '24 to $293/MT in Sep '25. Stalled domestic demand and high supplies in market are impacting exporters amidst low prices. Prices are expected to maintain the same momentum in next quarter.
- **Canada**'s prices are highest among the countries, trending between USD 610 – 900/MT. Canada exports significant share (~93%) of potato to US and with new crop arriving at market, prices have softened moderately August onwards. Further, large domestic crop in US for 2025 to keep demand for Canadian imports low wherein cool temperature in first half of September have facilitated good harvesting in US therefore keeping prices bearish next quarter.
- **China's prices remained firm into mid-2025, driven by tight stocks and high seasonal demand. Prices softened in August 2025 onwards with high domestic production backed by fresh winter crop arrivals. However, with stored supplies coming in market October onwards , the prices are expected firm up next quarter.**
- **India's** potato prices in **MY2026 saw a downturn after high prices in MY25**, higher production and increased stocks. Prices in the upcoming quarter likely to firm up as 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. OND stand for October, November and December; Above prices are FOB

Price Trends of Key Importing Nations



- **US fresh potato import prices surged** to $940 per metric ton in **August 2025**, driven by **higher Canadian production costs** caused by weather-related yield reductions. **With fresh arrivals, prices moderated** by 3-5% in September 2025. High domestic production with weak demand to keep prices bearish in coming quarter as well.
- Malaysia import prices largely remained with in the range of 310-380 USD/MT over the past 1 year. Abundant regional supply from China and India, and stable demand led the prices to soften in September 2025. Imports from Egypt have also witnessed strong momentum in 2025. Economic ties between Egypt and Malaysia have strengthened in recent years, positioning Malaysia as an increasingly attractive market for Egyptian exporters
- 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.
- While fresh harvests across southern Europe have kept prices low, Italy's winter processing demand is largely met through Northern Europe, where only 25–30% of the crop has been harvested so far preventing any sharper dip in import price.

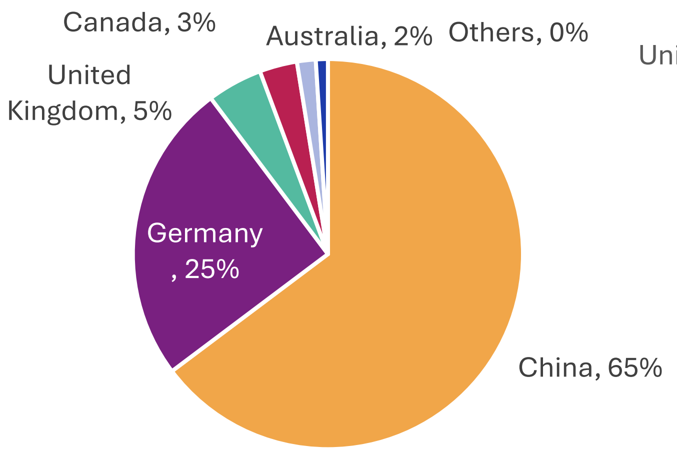
Source: ITC trade map, HS code 0701

Indian Potato Export Opportunity in Thailand Market

Imported Volume (2024)	97,587 tonnes
Key Competitive Exporters	China, Germany, UK, Canada and Australia
CAGR growth (MY19-MY24)	~5%
India's Penetration (In the country's import basket)	Nil *(India mostly ships via Malaysia and Indonesia. Direct shipments of 29 tonnes were reported in 2017.)*
Key Imported Product Type	• Frozen and processed potato products – French fries, flakes, wedges, chips • Fresh table potatoes for processing (Atlantic, Kennebec, Spunta)
Key Indian Exported Product Type	• Frozen fries and dehydrated potato flakes • Potato starch
Average Thailand Import Price (2024)	385 USD/MT

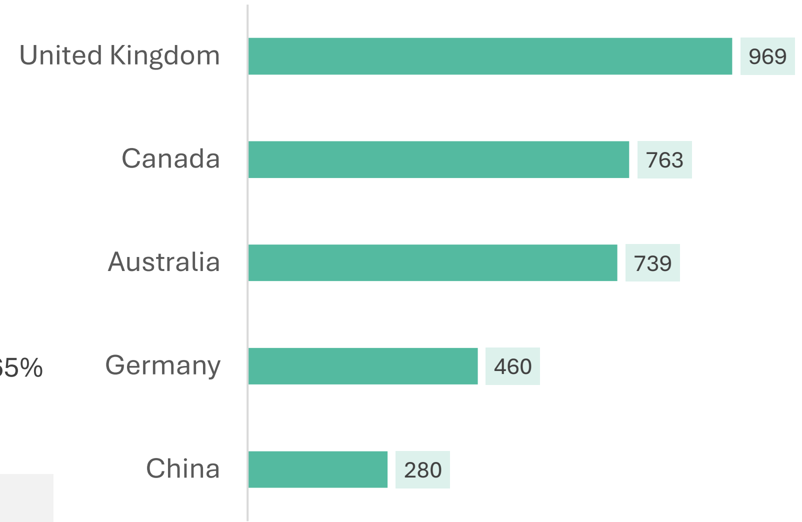
Source : ITC Trademap, CRISIL Intelligence

Share in Total Import Basket (2024)



China leverages ASEAN-China FTA duty free access, short haul logistics and year-round supply

Average Import Price, 2024 (USD/MT)



- Thailand is a **high-potential markets** for Indian potato exports, with robust import growth rate 5%, driven by rising QSR and frozen food penetration
- India has already made inroads into the market largely through indirect exports via Malaysia and Indonesia largely in **value added segments**, but it also has the opportunity to directly target these countries.
- Although China remains Thailand's top supplier, rising source diversification need and higher prices from EU suppliers are opening space for competitively priced Indian products.
- Indian potato export prices are **~17% lower** than those of major suppliers like **China**, giving India a competitive edge in the Thai markets.
- India's limited direct access reflects longer sea transit time and the lack of a Phytosanitary Agreement. However, **processed potato products, flakes, and frozen fries** remain viable niche where India can compete on price. India's can leverage ASEAN logistics routes to gradually build share.

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.

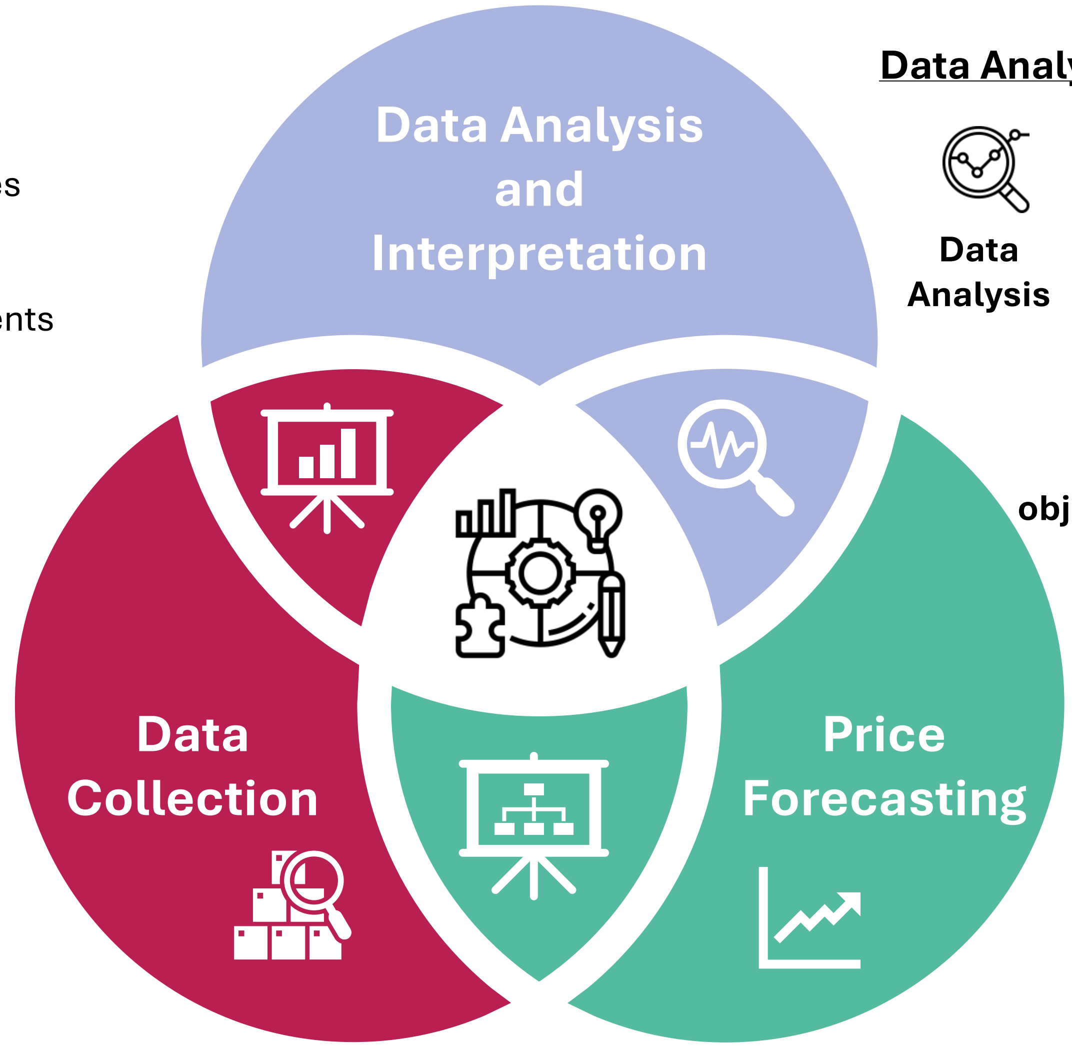
Data Collection

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.