

# Monthly dashboard - Cucumber & Gherkins Oct-2025

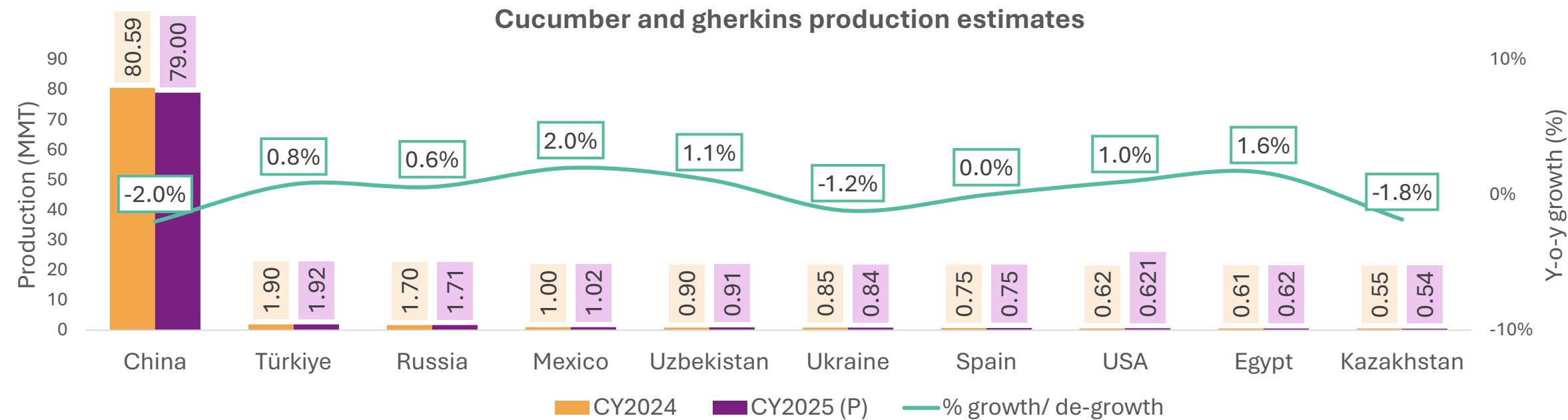


# **Acreage and production trends**





# Production estimate of major producing countries



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

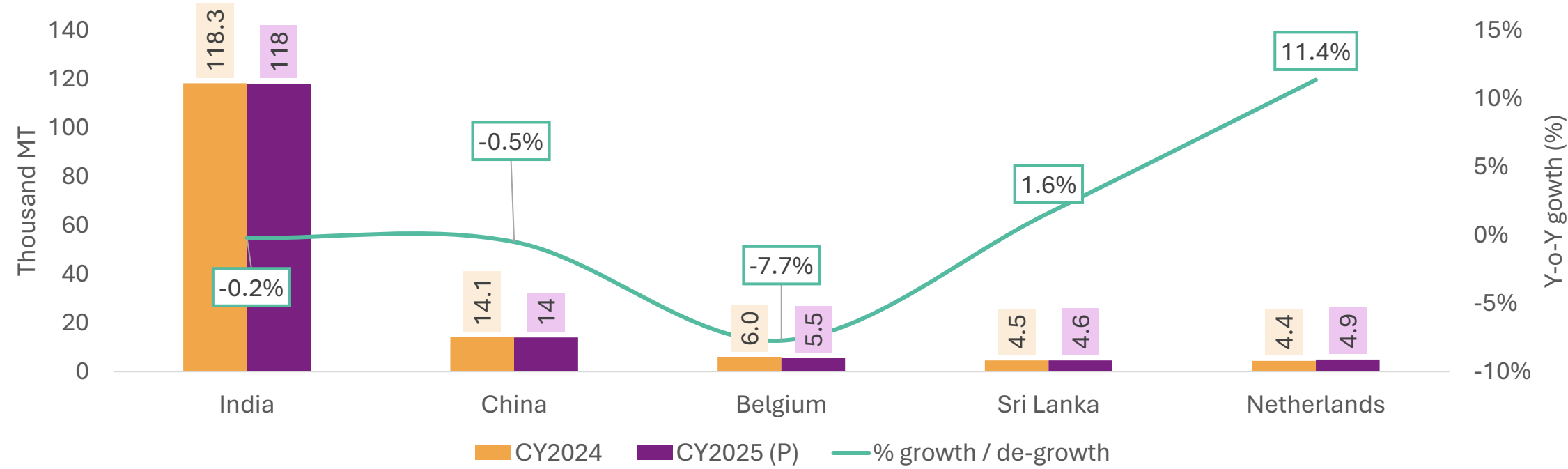
- Top 10 countries **account for ~92% of cucumber & gherkin output; China alone contributes ~83–84%.**
- China’s cultivation area is expected to reduce by 1-2% in CY2025.
- Türkiye, Russia, Mexico, Uzbekistan, U.S. and Egypt show modest CY25 growth from 0.6% to 1.6%. However, in early-mid August 2025, 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**

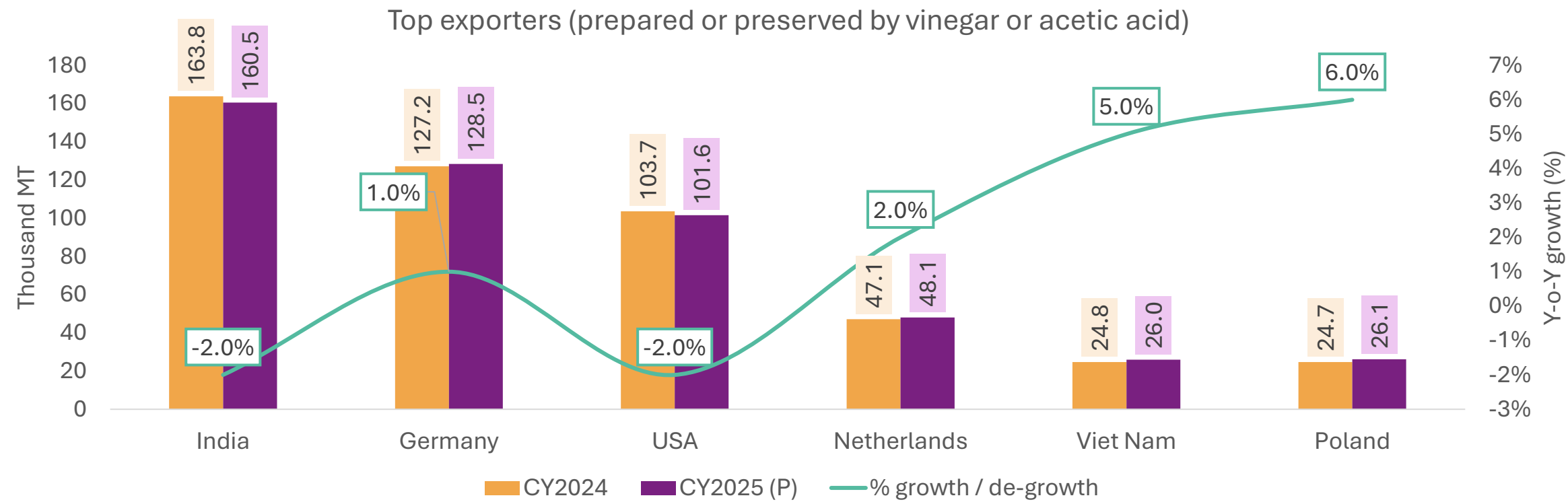
# Major exporters of Cucumber and Gherkins

Top 5 Exporters (Provisionally preserved)



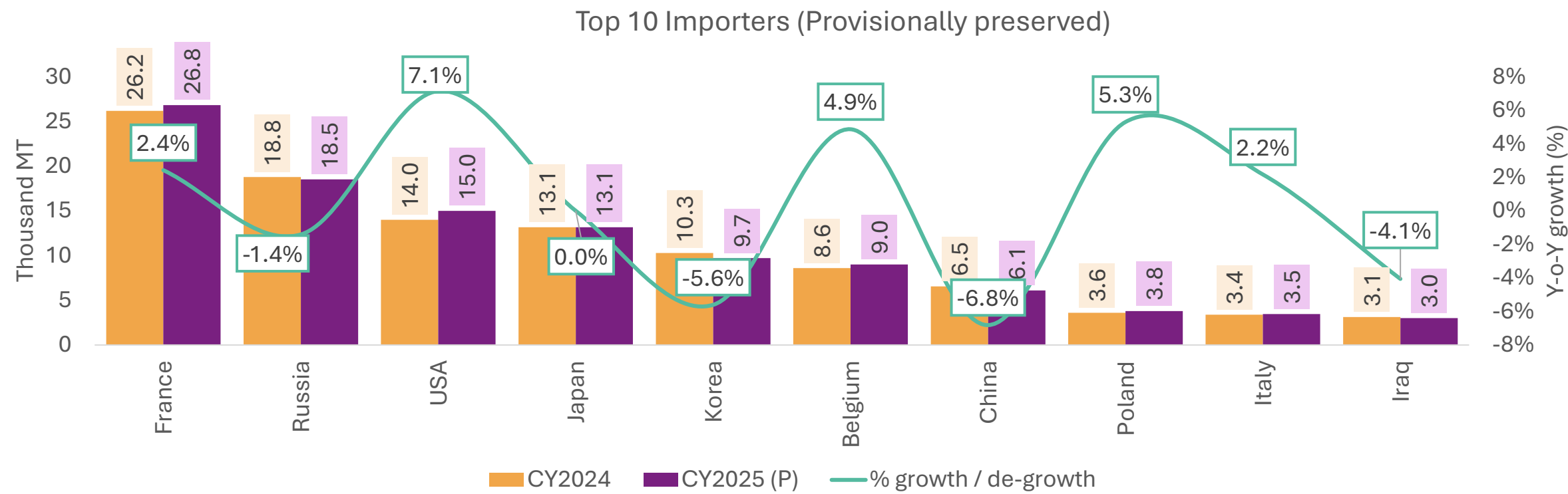
- The **top 5 countries contribute ~90% of global exports of provisionally preserved** cucumbers & gherkins.
- **India leads with ~72% share; however, exports may dip in CY2025 due to U.S. tariffs** ( ~13% of India’s exports goes to USA, 4<sup>th</sup> largest destination).
- However, till July 2025, 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



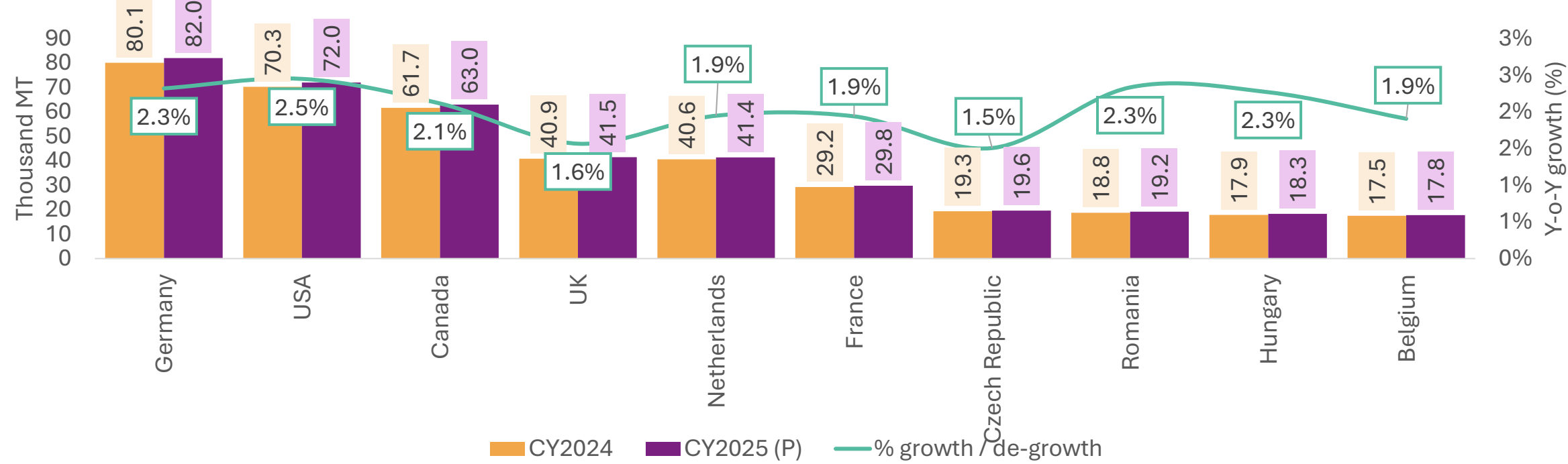
- The countries shown in the chart **collectively account for ~75% of global provisionally preserved cucumber and gherkins imports.**
- **EU accounts for >60% of total global imports** by value of provisionally preserved gherkins. Volume growth is expected to rise ~5-10% YoY in CY25 after a strong H1 (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.

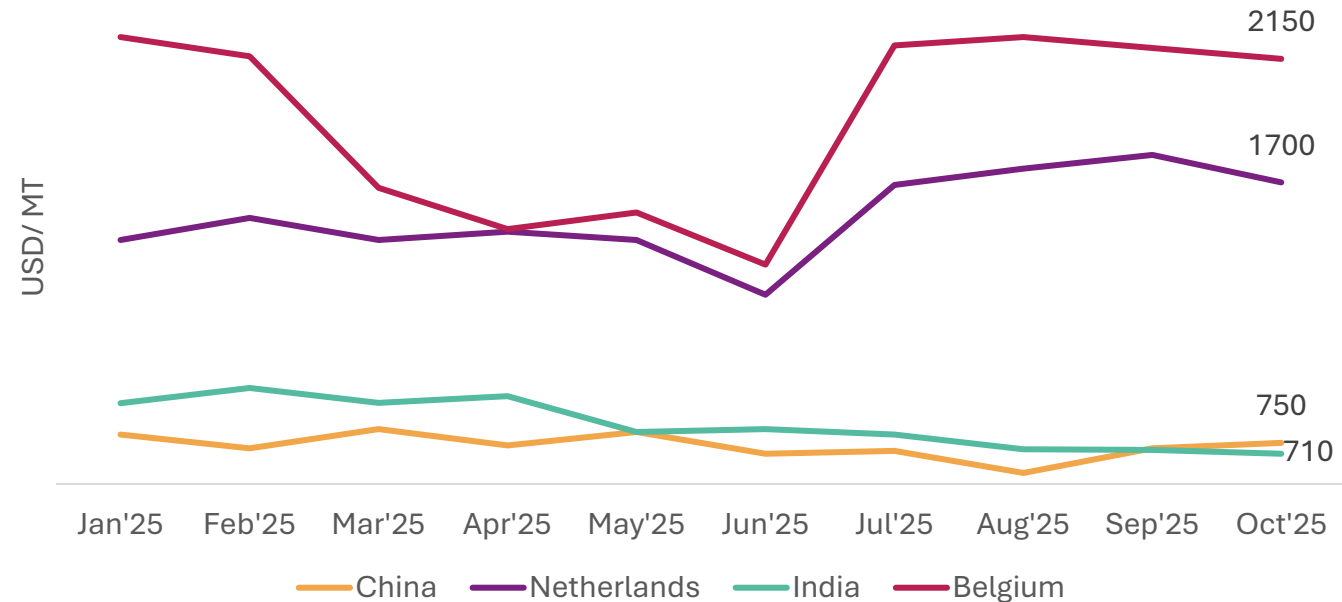
P – Projected value; CY – Calendar year

Source: ITC trade map



# Export prices forecast – Fundamental analysis

Export price trend (Provisionally preserved)



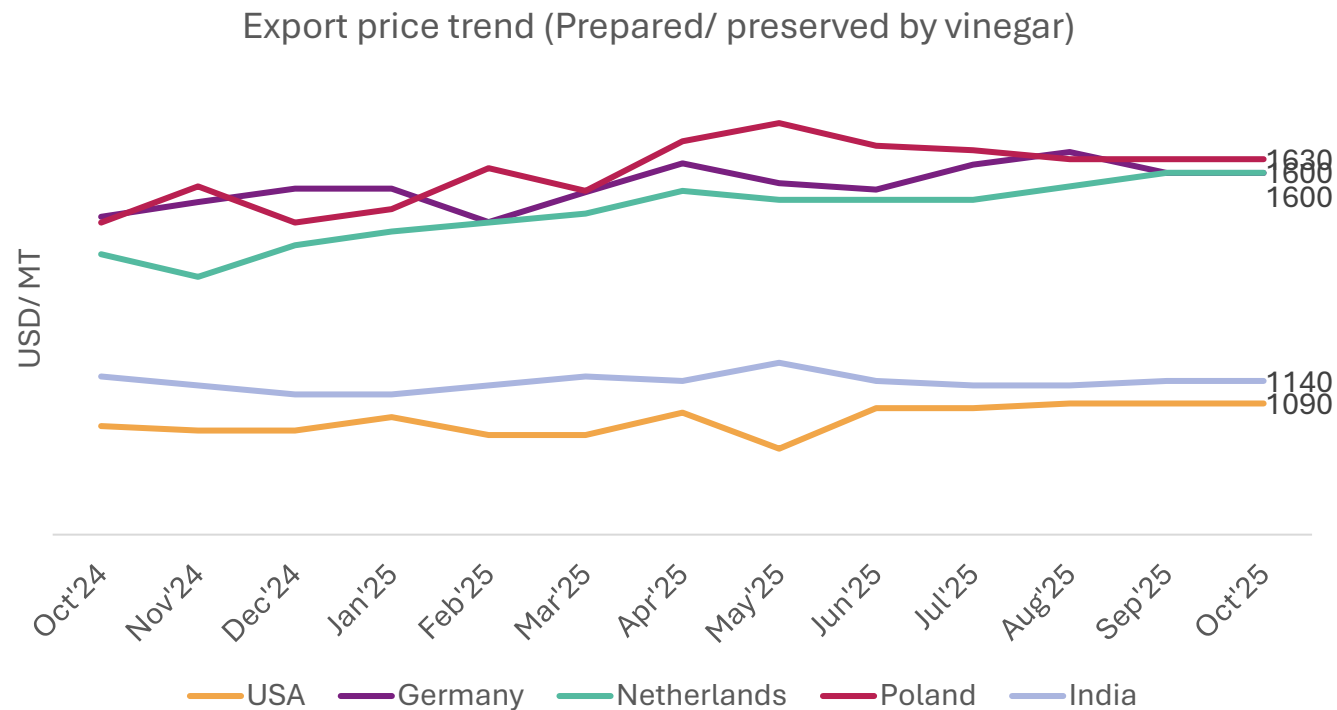
Price outlook for next three months (NDJ)*					
Countries	Oct'25	Oct'24	Change over year	Price direction	Forecasted Average price range for NDJ*
	Price	Price			
	(USD/MT)	(USD/MT)	change		(USD/MT)
China	750	750	0%	Sideways	750-760
Netherlands	1700	1660	2%	Sideways	1700-1800
India	710	960	-26%	Sideways	710-720
Belgium	2150	1890	14%	Sideways	2000-2100

Note: Price forecasting is based on the fundamental analysis.

\*NDJ stand for November, December and January 2026

- **China’s production for MY25 is expected to decline marginally by 1-2%.** Prices likely to hover in the range of 750–760 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



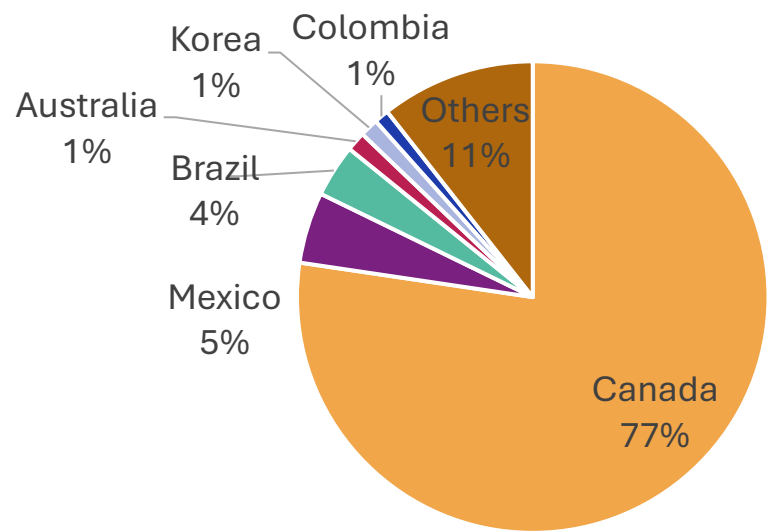
Price outlook for next three months (NDJ)*					
Countries	Oct'25 Price	Oct'24 Price	Change over year	Price direction	Forecasted Average price range for NDJ*
	(USD/MT)	(USD/MT)	change		(USD/MT)
USA	1090	1040	5%	Bullish	1090-1100
Germany	1600	1503	6.5%	Sideways	1590-1620
Netherlands	1600	1420	13%	Bullish	1670-1720
Poland	1630	1490	9%	Bullish	1700-1730
India	1140	1150	-1%	Sideways	1130-1150

Note: Price forecasting is based on the fundamental analysis.  
\*NDJ stand for November, December and January 2026

- 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 1590-1620 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

# USA’s Export Market Analysis - Prepared/Preserved by Vinegar (HS 200110)

USA’s Export Basket (CY2024) – Basis export volume



Source: ITC Trade Map

Canada’s Import analysis

Supplier	Share in import basket (%)	Unit Price (USD/MT)
United States of America	69%	1710
India	21%	1064
Hungary	3%	1511
Germany	2%	1424
France	1%	4179
Others	5%	

Source: ITC trade map

- While the USA dominates with **77% of its cucumber and gherkin exports going to Canada**, India has already established a strong presence with 13,015 MT in 2024.
- 21% of Canada’s total imports are already met by India at a competitive price of USD 1,064/MT, compared to the USA’s higher price of USD 1,710/MT.
- Opportunity for India:** By strategically strengthening supply chains and building long-term partnerships, India can further increase its share and establish itself as a leading supplier to the Canadian 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



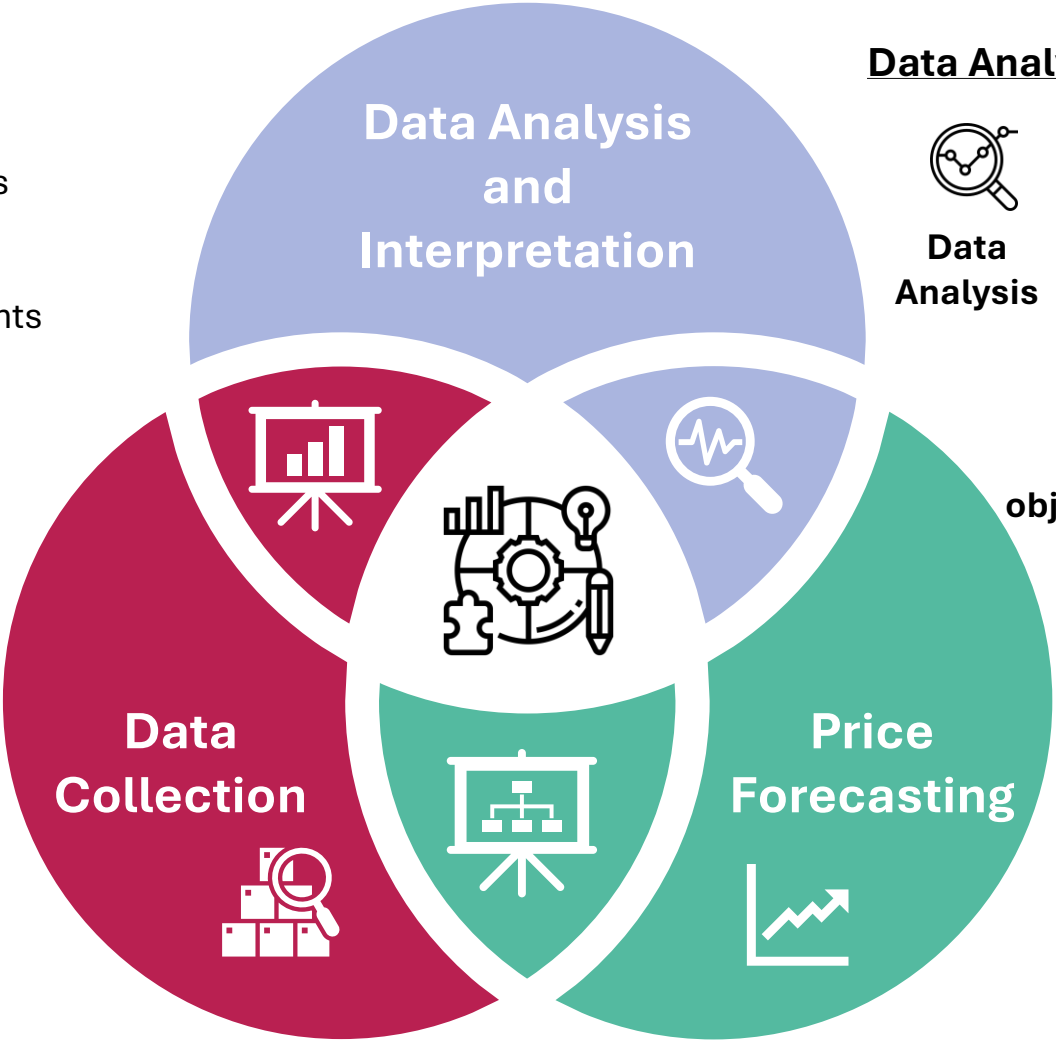
### Sources

- 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.*