

Crisil

a company of S&P Global



Monthly dashboard- Potato

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

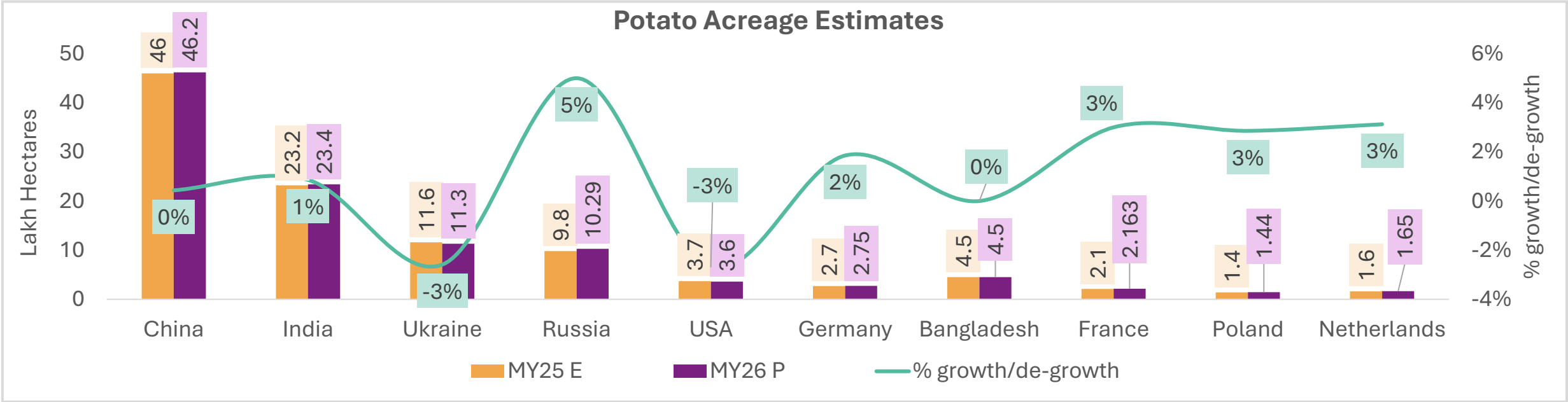
- Potato cultivation is predominantly concentrated in a single winter season across most countries, with the notable exceptions of China and the United States. In regions such as India, Bangladesh, and parts of China, the harvesting period largely overlaps, typically falling between January and March.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

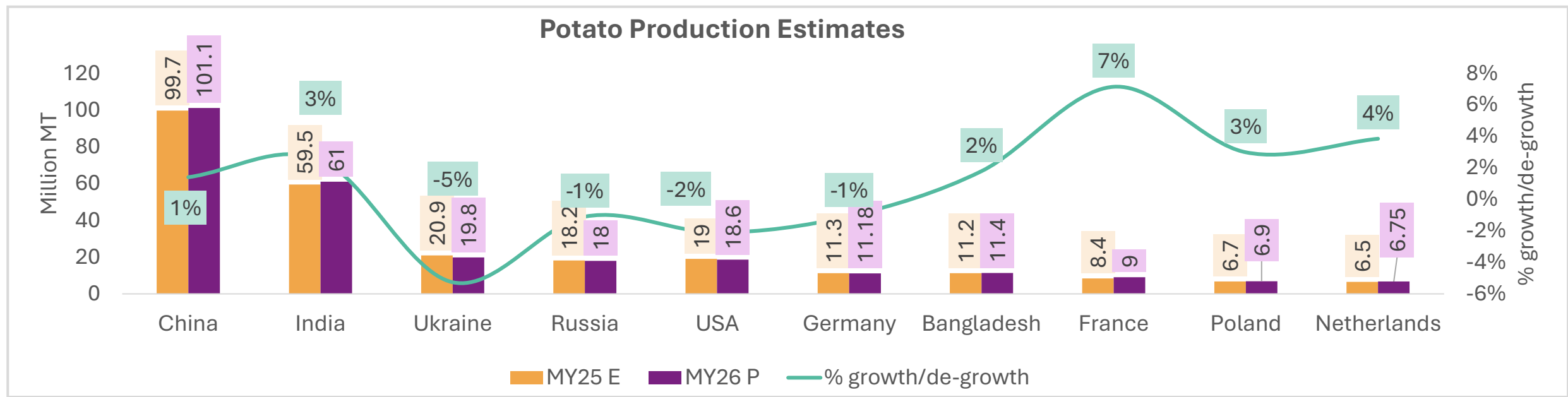
Acreage Estimates of Major Producing Countries



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



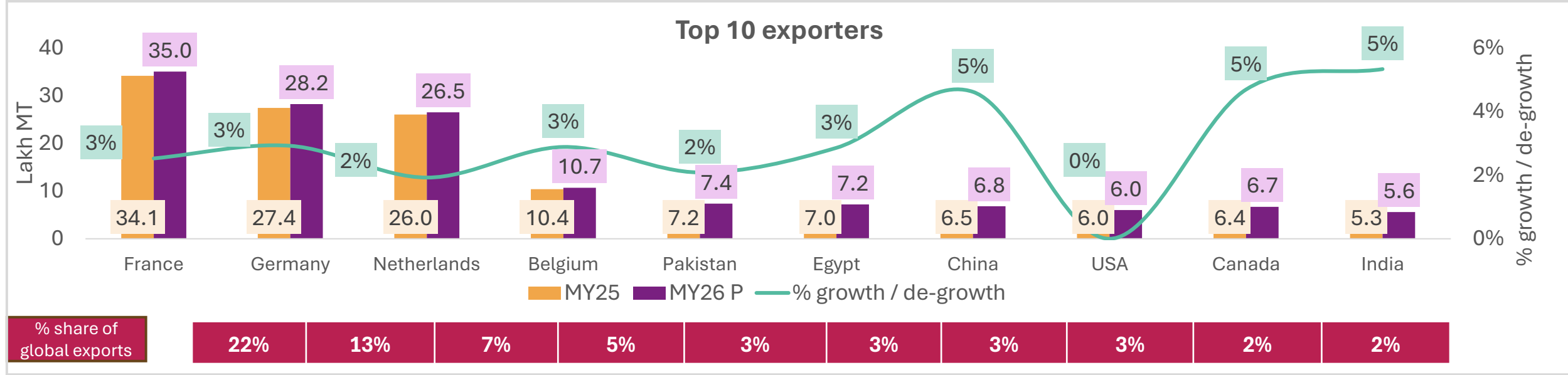
P – Projected value; MY – Marketing year (Aug-Jul)

- 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 disease¹**, 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.



Export trends and price outlook

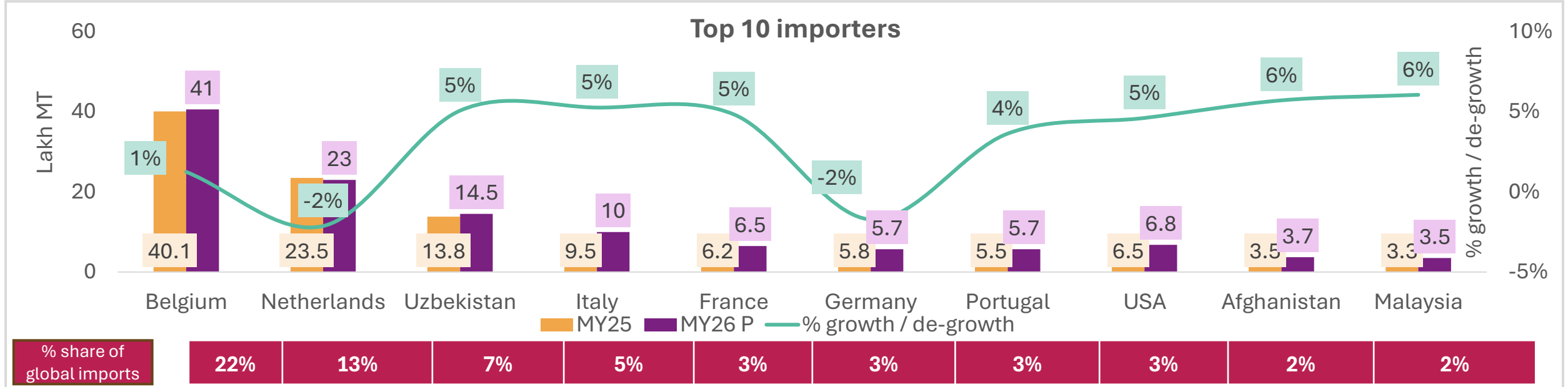
Major Exporters of Potato



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 supplier** of fresh potatoes, led by France, Germany, Belgium, and the Netherlands.
- Belgium has almost completed its 2025 potato harvest. Yield and quality are mostly high, although hot, dry summer conditions affected size and dry matter content in some areas. **French exports are expected to improve owing to** high production levels, anticipated demand for fries and chips as well as 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.
- Egypt faced weak export demand and seed shortages in MY24. In MY25, Improved seed availability and optimal weather conditions have driven better planting conditions and is thus supporting exports momentum
- 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 from Afghanistan, Sri Lanka, the UAE, and Central Asian markets. Although fresh and chilled potatoes dominate outbound shipments, the processed segment is expanding gradually

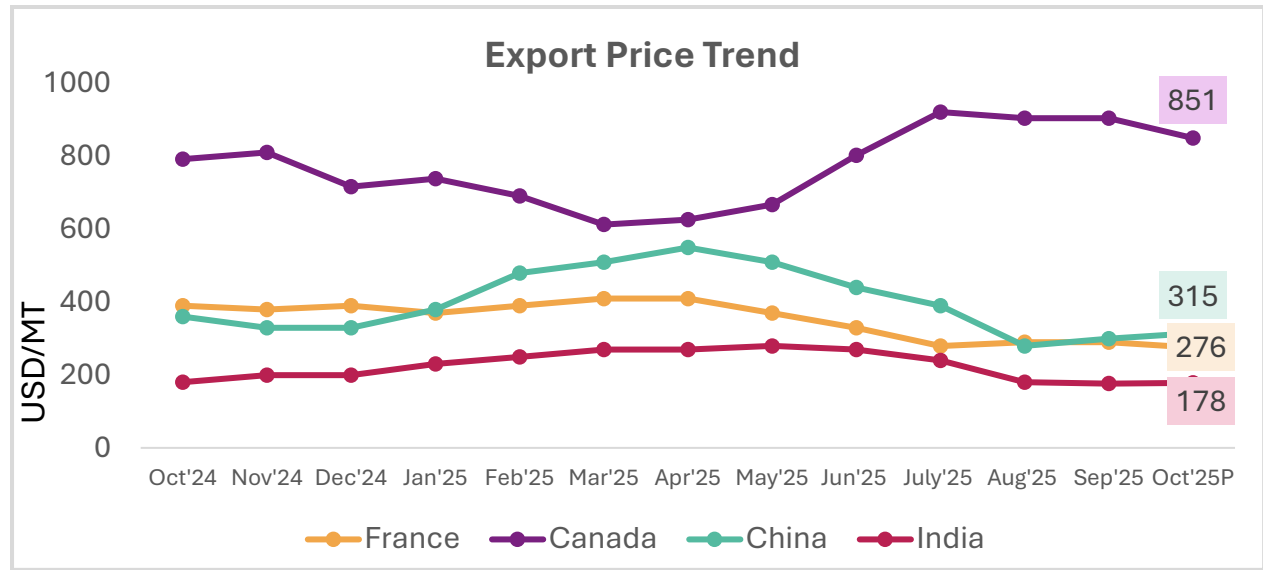
Major Importers of Potato



- 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. Italy imports are also expected to increase on year wherein demand for branded origin potatoes (POD and PGI) are performing better than conventional varieties, enjoying higher consumer recognition.
 - 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.** Processing facilities are also operating at lower capacity due to lower French fries' consumption in Europe ; while supplies are ample processing companies aren’t capitalizing on the lower prices due to existing expensive contracts.

PGI : Protected Geographical Indication, POD : Protected Designation of Origin

Price Trends of Key Exporting Nations

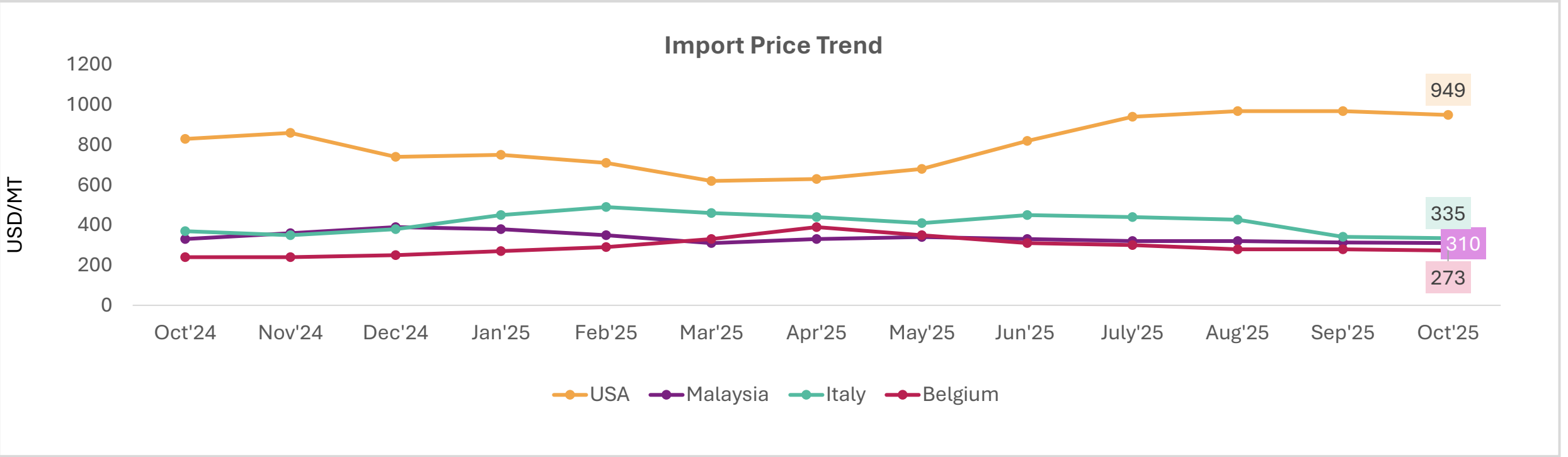


Price outlook for next quarter (NDJ)*					
Countries	Oct'25 Price (USD/MT)	Oct'24 Price (USD/MT)	%age change	Price direction	Average price range for NDJ (USD/MT)
France	276	390	-29%	Bearish	260-270
Canada	851	793	7%	Bearish	790-830
China	315	360	-13%	Sideways	300-320
India	178	180	-1%	Bullish	185-195

- 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. However, with European harvest drawing close, market conditions are stabilizing with steady retail sales.
- In **France**, conclusion of harvest season is having no effect on the market season due to high storage stocks. Storage challenges like **rots and early germination** are further impacting free buy demands. While contracted deliveries are fetching decent returns (**over 210 USD/MT**), prices in open market have crashed and is expected to keep momentum **bearish for next quarter**.
- Canada’s** prices are highest among the countries, trending between USD 610 – 900/MT. Canada prices witnessed inch up by 15-20% in July-August 2025 due to export prices review by Canada Border Services Agency (CBS) under Whole Potatoes SIMA Anti-dumping case to safeguard domestic prices against dumping of cheaper imported potatoes. Canada exports significant share (~93%) of potato to US, wherein large domestic crop in US for 2025 to keep demand for Canadian imports low 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 prices firmed up by ~5% on month, and the prices are expected remain at **similar level for next quarter**. China’s enhanced focus on French fires export market is reflecting in a record export in Aug-Sep 2025 under the category.
- 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 due to stored supplies coming into market.

Source: ITC trade map, HS code 0701 ; Note Price forecasting is based on the fundamental analysis. NDJ stand for November, December and January; 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 an October 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 October 2025. With anticipated reduced arrivals from India and Egypt due to lack of fresh arrivals, prices are expected to firm up.
- Amid EU record harvest in 2025 price are expected to ease in Italy. Despite stable demand from large retailers and stable market conditions, the excess supply in Europe continues to affect Italian pricing. Branded origin potatoes (POD and PGI) are performing better than conventional varieties, leveraging higher consumer recognition.
- Belgium 2025 potato harvest is also completed, wherein approximately 90%-95% is lifted. Yield and quality of produce are largely stable although hot, dry summer conditions have impacted size and dry matter content in some areas. However, an abundant supply is pushing prices down in the market wherein area under storage potatoes have increased by 4.7% totaling 96,333 hectares.¹

Source: ITC trade map, HS code 0701 ; Source : 1. StatBel

EU and US Facing Supply & Quality Issues in Gulf countries, creating Strong Momentum for India

EU and US suppliers facing structural supply and quality issues in GCC markets

- **In MY25**, European cold stores are filled with older, deep-frozen stock, which has forced processors across the EU region to operate at a laid-back pace or even halt production temporarily due to **weak demand and oversupply**.
- The **shortage of seed potatoes last season in MY24** compelled European processors to use **second-grade potato varieties**, resulting in a low-quality processed product and reducing the confidence of GCC buyers.
- Contracted potato prices in Europe have risen sharply to **~3000 USD per tonne**, making European frozen fries costlier and less competitive compared to Asian suppliers.
- Despite global demand for frozen fries rising until July, European and American exporters have not been able to capture this growth due to production slowdowns, older inventories, and weaker product quality.
- EU and US suppliers are unable to reliably meet GCC requirements, creating a gap in the region's sourcing patterns.

India is leveraging the market shift in GCC

- **India** has become one of the biggest beneficiaries of the supply-side disruptions in Europe and the US, with its exports of frozen fries growing by **31% year-on-year** in the **first five months of 2025**.
- Indian unit export prices are ~12%, ~14%, ~19% and ~20% competitive than European players like Belgium, France, Germany and Netherland respectively, weighed down by high raw-potato costs
- GCC countries are showing a strong shift in preference: India has witnessed CAGR (MY19-MY24) of **~138% in Saudi markets and ~209% in UAE and over ~300% in Oman and Bahrain** indicating clear displacement of European suppliers.
- Indian exporters have been able to supply newer, fresher shipments without legacy stock issues, which has strengthened buyer trust and led to repeat orders from major GCC importers and distributors.
- With competitive countries dealing structural challenges, India has a strong near-term advantage to deepen its presence.

Way forward for India : How to consolidate and expand the opportunity in GCC

A. Moving India from Opportunistic Gains → Long-Term Supplier Status in GCC Frozen Fries

- India can continue strengthening its GCC partnerships by building on consistent quality, stable supply schedules, and competitive pricing to build long-term contracts

B. Extending the Momentum from Frozen Fries → Fresh Potato Exports

- With a strong shift to Indian frozen fries, is an ideal time to position India as a reliable supplier of table and processing-grade fresh potatoes as well.
- Already, India has witnessed a CAGR of ~15%, ~5% and ~4% in fresh exports countries like Bahrain, Saudi and UAE respectively.
- India can use its rising credibility in processed fries to push for higher-volume fresh-potato shipments, especially currently when European supply has quality concerns.



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.

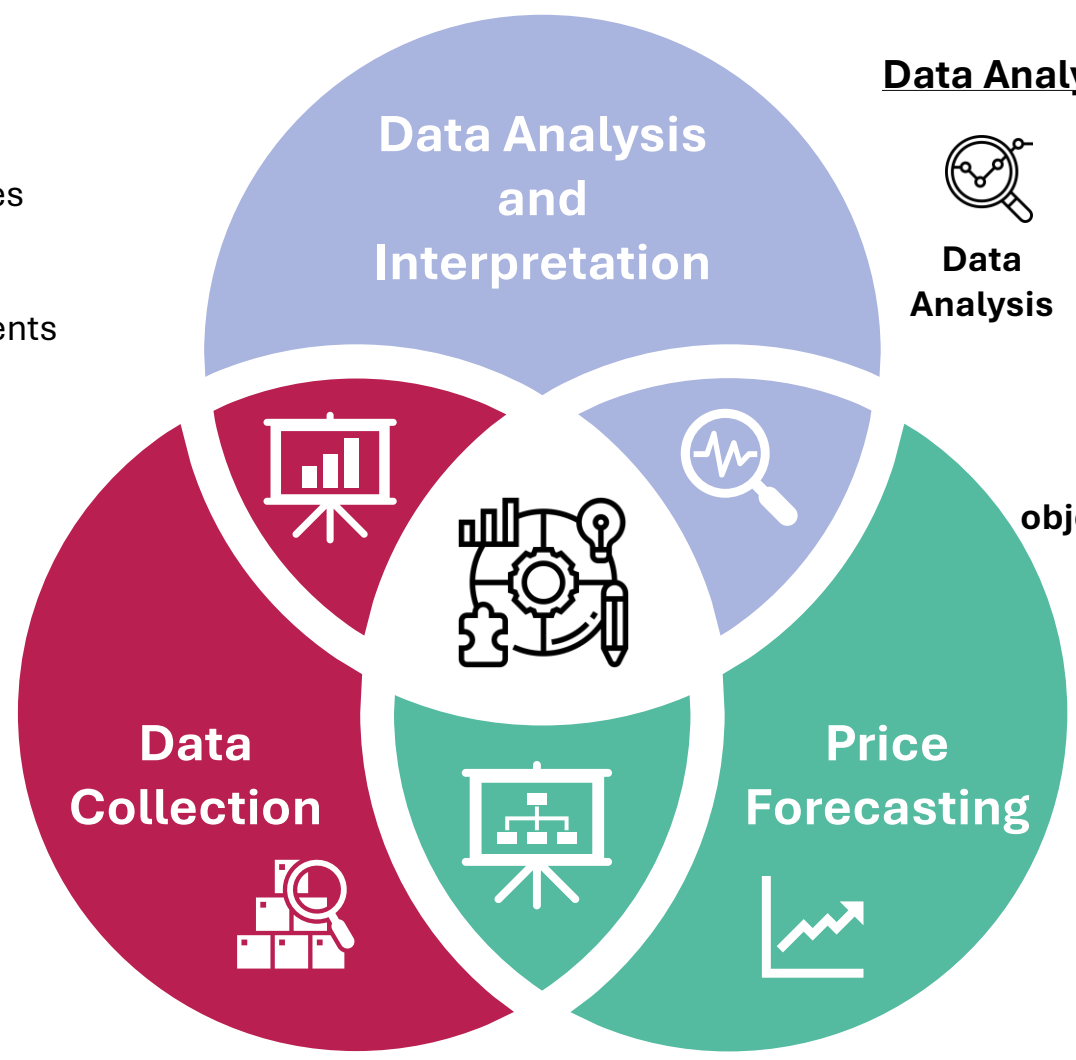
Data Collection

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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.