Crisil
a company of S&P Global

Monthly dashboard- Potato

Nov-2025

एपीडा
APEDA

Acreage and production trends

Potato Crop Calendar of Major Producing Countries

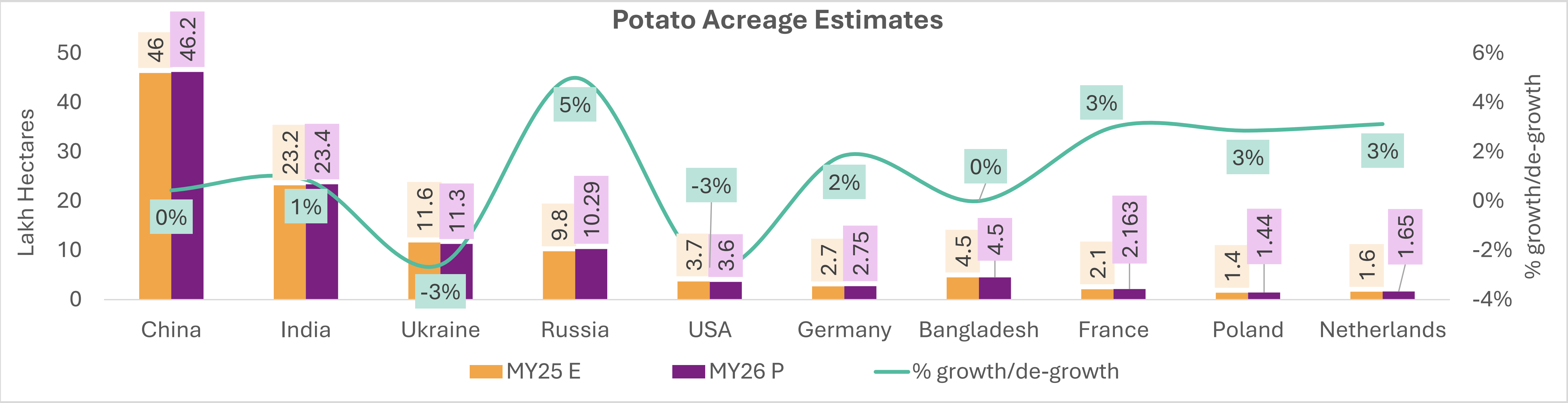
Countries	Season	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China	North			Sowing	Sowing		Harvesting	Harvesting					
	South (Autumn)								Sowing	Sowing		Harvesting	Harvesting
	South (Winter)			Harvesting	Harvesting							Sowing	Sowing
India	Rabi	Harvesting	Harvesting	Harvesting							Sowing	Sowing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

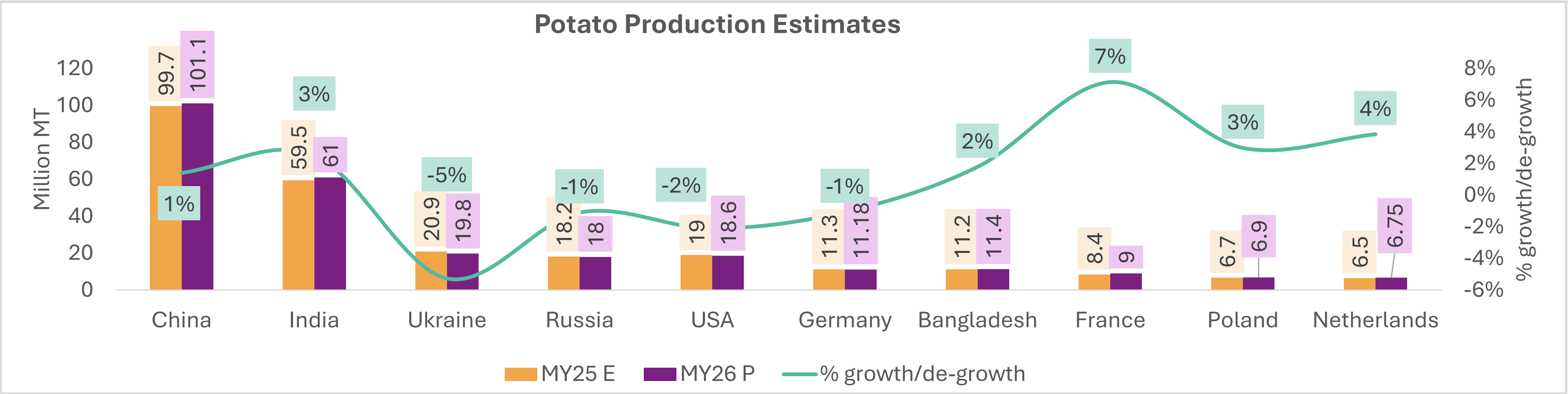
Acreage Estimates of Major Producing Countries



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



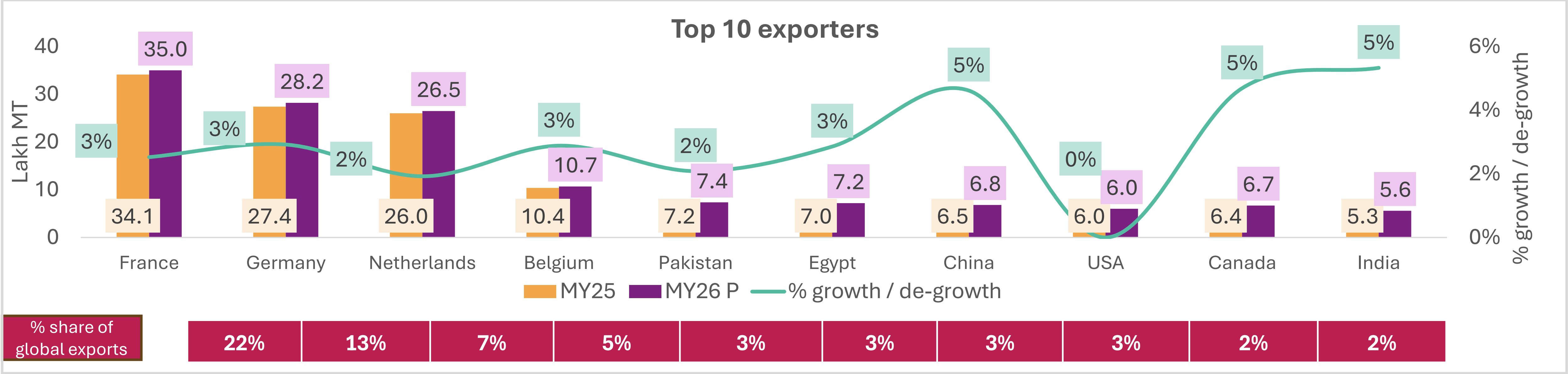
P – Projected value; MY – Marketing year (Aug-Jul)

- The countries highlighted in the chart account for **nearly 68% of global potato production**. Global output is expected to increase marginally by 1–2% year-on-year.
- **China's MY26 production is projected at 101.1 MMT, keeping its lead as the top producer**, supported by stable acreage, government food security initiatives, improved varieties, mechanization, and steady yield growth.
- **The Netherlands[1]** recorded a **strong ware potato** crop in **2025**, with production rising **37% YoY**, driven by a **9% increase** in planted area, favorable weather, and yields of 53–54 t/ha. However, as fresh ware potatoes make up only 20–25% of exports (seed and processed products dominate), overall Dutch potato exports rose moderately by 4%.
- **Germany faces production challenges from Stolbur disease[2]**, which causes wilting. This may benefit Indian exporters, as Germany exports to Oman, Indonesia, Vietnam, Malaysia, and the UAE—also key Indian potato markets.
- **Ukraine's potato production is set to decline** due to spring frosts and labor shortages from the war. With harvests starting in August, high storage and logistics costs are expected to keep market prices elevated.

Source: 1 The Netherlands ware potatoes, 2025
Source : 2 Deutsche Welle, 2025

Export trends and price outlook

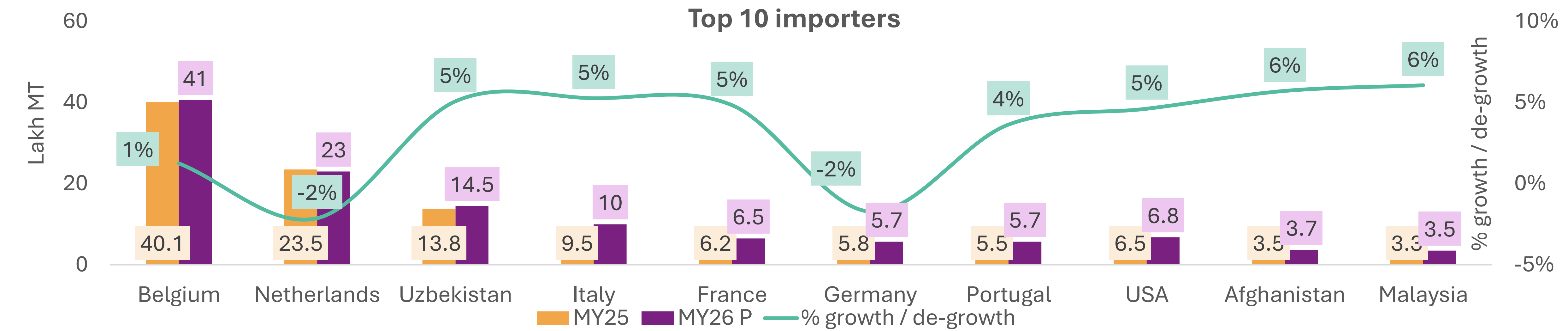
Major Exporters of Potato



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

- The **countries in the chart account for about 80% of global potato exports**, with **global exports for MY26 expected to rise by 2–3% year-on-year**. The EU remains the largest supplier, led by France, Germany, Belgium, and the Netherlands.
- **Belgium has nearly completed its 2025 potato harvest**, with mostly high yield and quality, though hot, dry summer conditions affected size and dry matter in some areas. **French exports are expected to improve due to high production**, increased demand for fries and chips, and more orders from eastern Europe, especially for brushed varieties.
- **India, China, and Egypt are projected to increase exports in MY26,** driven by better production prospects and rising demand from the processing industry, particularly for French fries.
- **EU processed potato export volumes declined in key markets**, with frozen fry shipments down about 5% YoY in 2025 to 148,500 tonnes, mainly due to weaker demand from the UK and Asia, which tempered overall export growth despite ample supply.
- China saw strong momentum in Russia, with export volumes up 4.2 times YoY (Jan–Sep).
- **Pakistan's strong production is expected to support higher potato exports in MY26**, with demand for both fresh table and processing varieties from Afghanistan, Sri Lanka, the UAE, and Central Asia. While **fresh and chilled potatoes dominate exports, the processed segment is gradually expanding**.

Major Importers of Potato



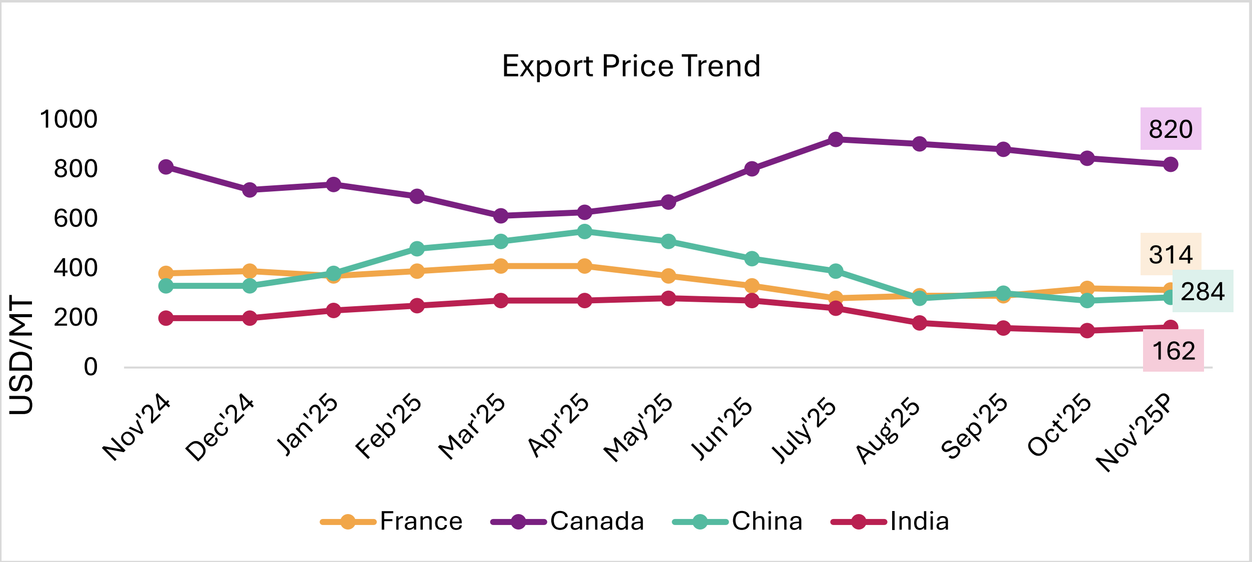
	Belgium	Netherlands	Uzbekistan	Italy	France	Germany	Portugal	USA	Afghanistan	Malaysia
% share of global imports	22%	13%	7%	5%	3%	3%	3%	3%	2%	2%

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

- **Belgium's potato imports are projected to reach around 41 MMT in MY26**, with a CAGR of 5–6% (MY20–MY24). Import growth has been strong, with France, Italy, and Portugal as the fastest-growing sources.
- **Uzbekistan continues to set new records for potato imports**, with a **CAGR of 33% from MY20–MY24**. Main suppliers are Iran, Kazakhstan, and Pakistan. High consumption, expanding cold storage, and production gaps are expected to sustain import growth.
- **Italy's imports are expected to increase year-on-year**, with demand for **branded origin potatoes** (POD and PGI) **outperforming conventional varieties** due to higher consumer recognition.
- Afghanistan remains a net importer due to limited local production and high consumption. Imports are expected to be 5–6% higher year-on-year in MY26.
- Malaysia, which relies on imports to supplement weak domestic output, is projected to see imports rise by 5–6% in MY26. Imports from Egypt have increased, with Egypt's share growing from 0.5% in 2024 to 1.5% of Malaysia's import basket.
- **Portugal's potato imports are projected to rise in MY26,** driven by a persistent supply gap between domestic production (~4.0–4.5 lakh MT) and consumption (~9.0 lakh MT). Competitive supplies from France, Spain, and the Netherlands, along with limited storage and steady processing demand, are expected to support import growth.

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

Price Trends of Key Exporting Nations

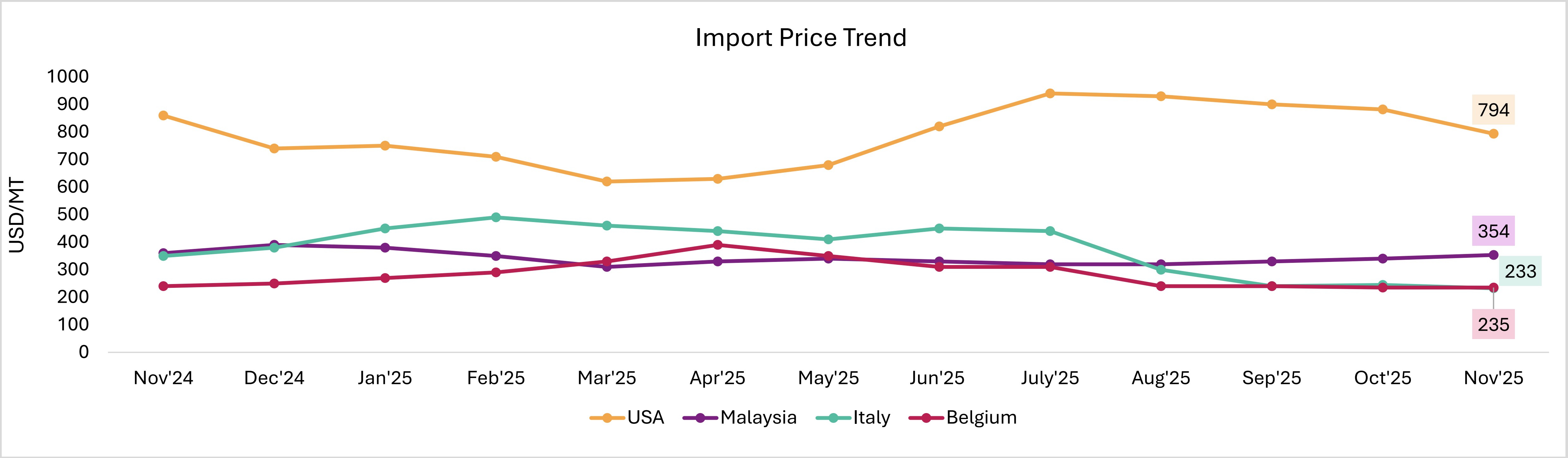


Price outlook for next quarter (DJF)*					
Countries	**Nov'25 Price (USD/MT)**	**Nov'24 Price (USD/MT)**	**%age change**	**Price direction**	**Average price range for DJF (USD/MT)**
France	314	380	**-17%**	**Bearish**	270-330
Canada	820	811	**1%**	**Bearish**	760-820
China	284	330	**-14%**	**Bearish**	260-300
India	162	200	**-19%**	**Bearish**	150-190

- Expanded potato acreage in Europe has led to production in Germany, France, Belgium, and the Netherlands exceeding processing industry contracts, with large "free buy" volumes entering the open market and causing a sharper YoY price collapse. As the harvest nears completion, market conditions are stabilizing with steady retail sales.
- **French potato export prices** dropped from USD 390/MT in Oct'24 to USD 320/MT in Oct'25 (-18% YoY) due to excess free-buy supply. Despite contracted deliveries above USD 210/MT, high storage stocks and quality losses keep sentiment weak, with prices **expected to stay bearish next quarter.**
- **Canada trades at premium levels (USD 610–900/MT),** but momentum has slowed. New crop arrivals, quality issues in PEI, and a large US crop—absorbing 93% of exports—are limiting demand, with **prices expected to remain mildly bearish next quarter.**
- **China's export prices** fell from USD 300/MT to USD 270/MT in Oct'25 (-10% YoY), with a brief 5% recovery in November. Rapid processing expansion, logistics improvements, and aggressive pricing are increasing competition, keeping prices **bearish.**
- **India's processed potato exports** jumped to USD 63.3 million in FY25 (from USD 11.4 million in FY22), driven by Southeast Asian demand and **premium pricing for dehydrated products**. Lower domestic wholesale prices are pushing processors toward value-added exports, keeping processed prices firm while raw export prices remain soft.

Source: ITC trade map, HS code 0701 ; Note: Price forecasting is based on the fundamental analysis. DJF stand for December, January and February; Above prices are FOB
PEI: Prince Edward Island Variety in Canada

Price Trends of Key Importing Nations



- **US fresh potato import prices rose until August 2025** (~USD 930/MT), driven by higher Canadian production costs after weather-related yield losses. Improved arrivals and ample domestic supply in September–October led to a 3–5% price correction, and with strong US production and subdued import demand, **prices remained bearish into October–November.**
- **Malaysia's import prices** stayed within USD 310–380/MT over the past year. Abundant supply from China and India, along with stable demand, softened prices in October 2025. Expected reduced arrivals from India and Egypt are **likely to firm up prices**.
- **French surplus inflows in late 2025 increased supply in** Italy beyond demand, pressuring import prices. Early October wholesale prices softened to USD 245/ton, **indicating weaker bids for October–November.**
- **Belgium's 2025 potato harvest is nearly complete**, with 90–95% lifting achieved and broadly stable yields despite summer heat stress. Increased storage potato area has resulted in ample supply, pushing prices lower. With domestic supply outweighing quality concerns, import prices are expected to remain steady.

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

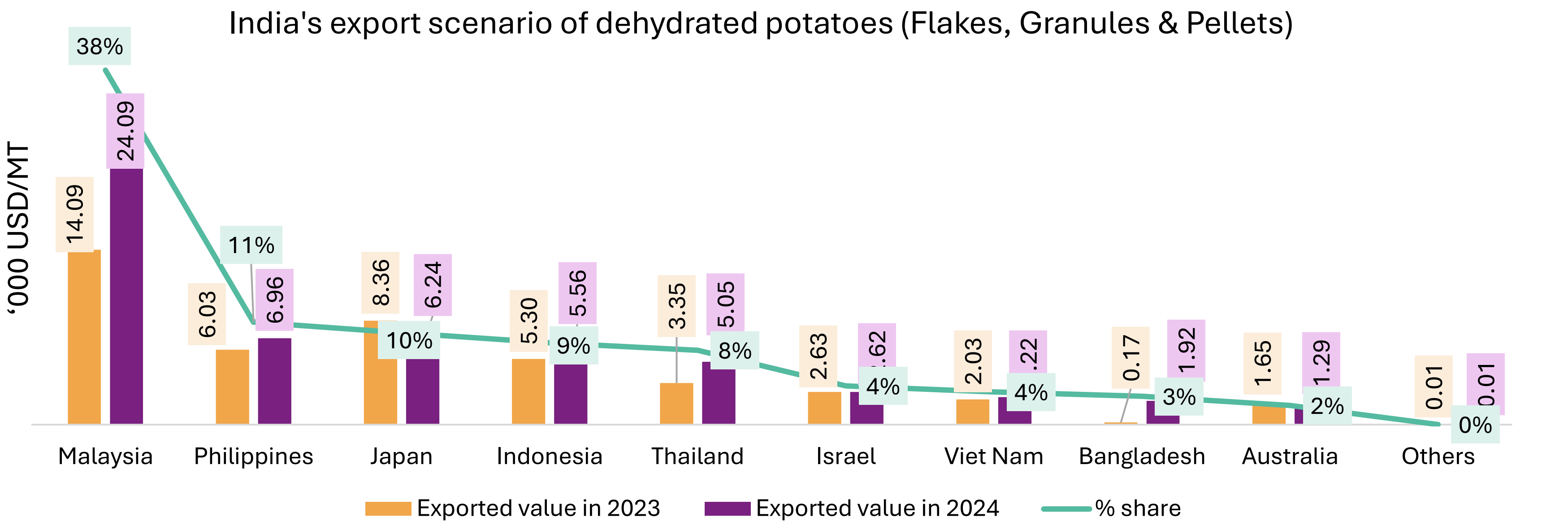
Way forward for India : How to consolidate and expand the opportunity in GCC

Moving India from Opportunistic Gains to Long-Term Supplier Status in GCC Frozen Fries

- India can strengthen its position in the GCC frozen fries market by moving from opportunistic gains to long-term supplier status. Consistent quality, stable supply schedules, and competitive pricing will help secure lasting contracts.

Extending the Momentum from Frozen Fries to Fresh Potato Exports

- With rising demand for Indian frozen fries, this is an ideal time to position India as a reliable supplier of table and processing-grade fresh potatoes.
- From 2020–24, India's fresh potato exports grew at a CAGR of ~28% to the UAE, ~12% to Bahrain, and ~4% to Saudi Arabia. India can use its credibility in processed fries to boost fresh potato shipments, especially as European supply faces quality issues.



- **The global dehydrated potato market is witnessing strong growth**, fueled by rising demand from snack foods, instant foods, and QSR chains, creating space for alternative suppliers amid supply constraints in Europe and China.
- India's processed/dehydrated potato exports jumped ~450%, rising from USD 11.4 million (FY22) to USD 63.3 million (FY25), led by potato granules, pellets, flour, and flakes—signaling India's rapid shift from raw potato exporter to a value-added supplier.
- **Nearly 80% of India's processed potato exports are absorbed by five Asian markets**—Malaysia, Philippines, Indonesia, Japan, and Thailand—with Malaysia as the largest buyer and Southeast Asia driving most of the incremental demand.
- **Strong potato availability (~56 million tons), processing clusters in Gujarat & UP, cost competitiveness, and trade access to ASEAN markets position India to further expand exports across Asia as a preferred snack-ingredient supplier.**

Source : ITC Trade Map, HS Code : 070910; Dehydrated Potatoes
GCC: Gulf Cooperation Council

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.

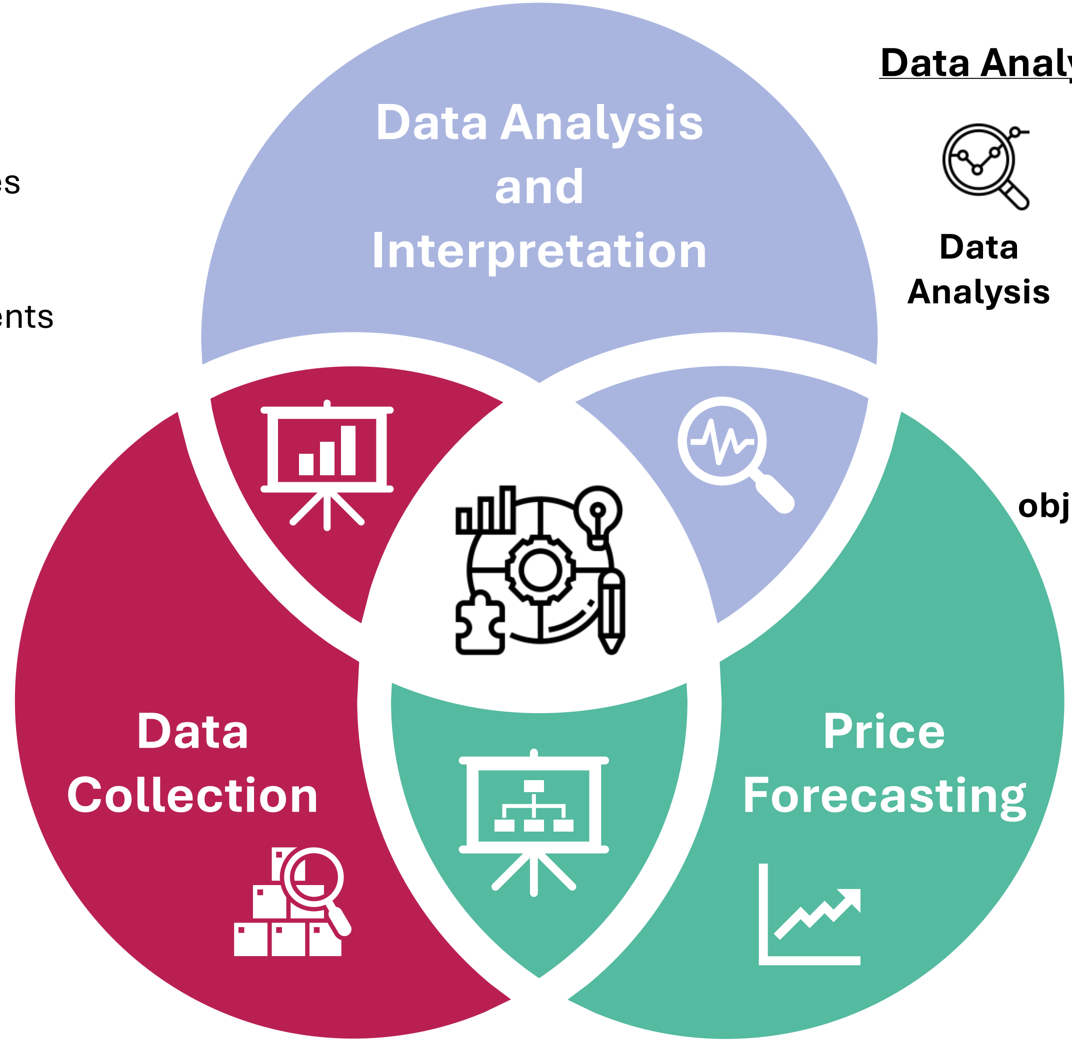
Data Collection

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.