

# Crisil

a company of **S&P Global**



# Monthly dashboard - Cucumber & Gherkins

HSN Code: 071140 & 200110

February-2026

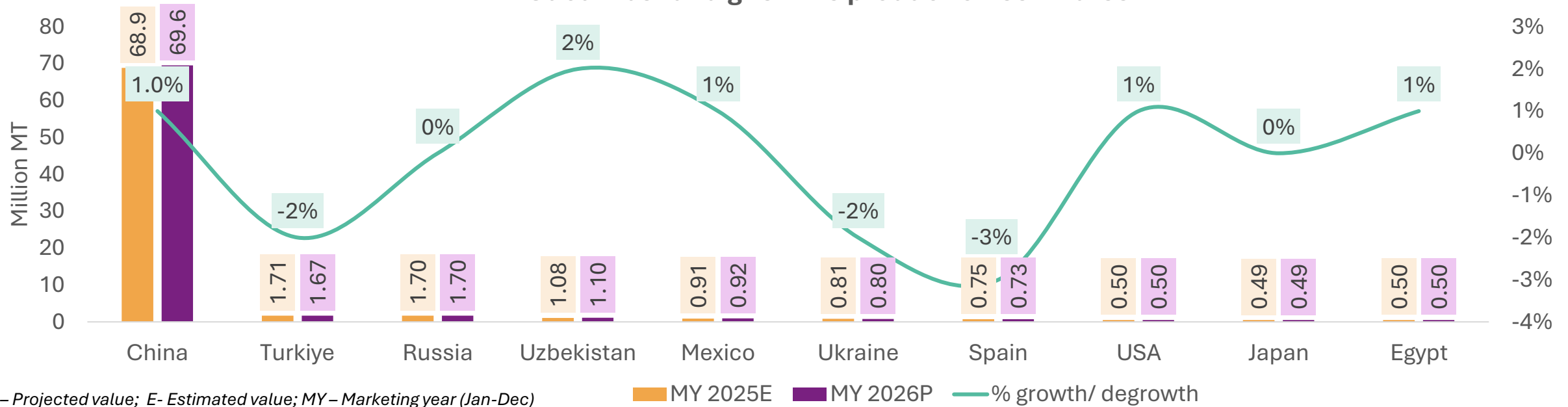
# Production trends





# Production estimate of major producing countries

## Cucumber and gherkins production estimates



- Top 10 countries **account for ~90% of cucumber & gherkin output; China alone contributes ~80%.**
- In China, cucumber belt spans central and northern provinces. Greenhouse area continues to expand, stabilizing yield and reducing seasonality in these regions.
- 2025 is one of the driest years in the history of the Turkey<sup>1</sup>. Drought has affected almost the entire country, hitting central and southern Turkey hardest — the primary cucumber-growing regions. Given ongoing drought severity (worst in 50+ years), irrigation water shortages, and reduced field productivity, Turkish cucumber-gherkin output is likely to fall in 2026.
- **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%, MY2020–25).**

Note: Production for MY2025E and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT (cucumber and gherkins)

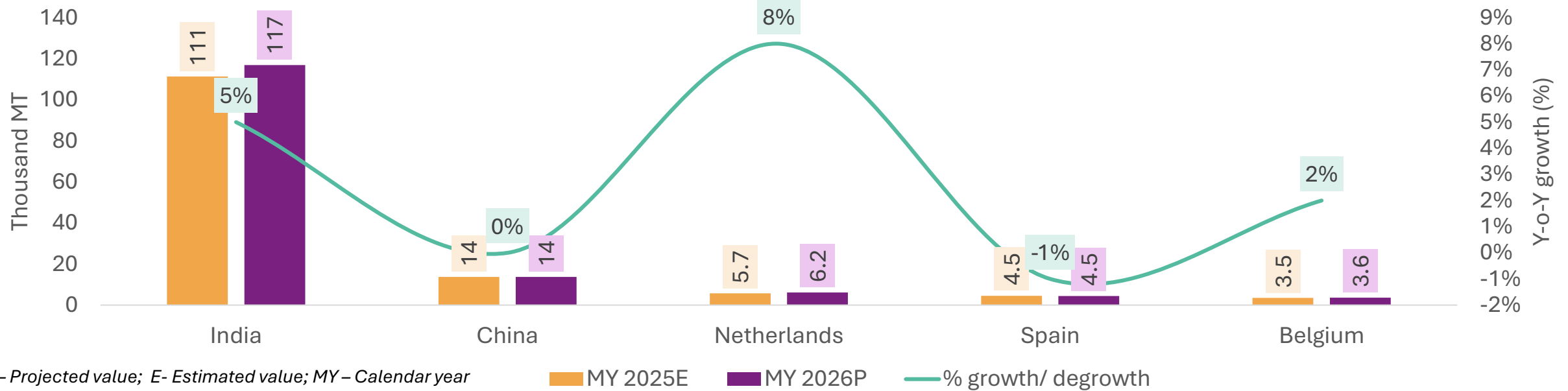
1: [Türkiye faces worst drought in 50 years as rainfall drops 27% - Türkiye Today](#)



# **Export trends and price outlook**

# Major exporters of Cucumber and Gherkins

Top 5 Exporters (Provisionally preserved)

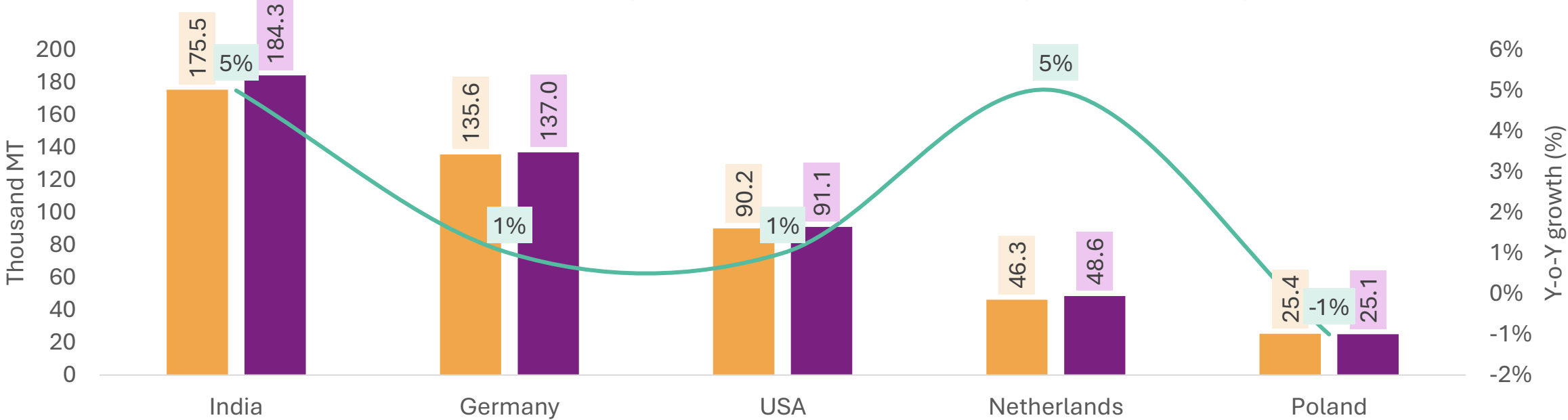


- The top 5 exporting countries account for approximately **95% of global exports**.
- India dominates the market with a 76% share; export volumes are forecasted to grow by 4-6% in 2026.
- Exports to the European market are expected to increase by 1–2% in volume, driven by rising demand for health-conscious snacks, growth in the premium pickle segment, and the expanding popularity of plant-based diets, which are fueling higher gherkin consumption in both the EU and UK.
- Spain mainly **IMPORTS** bulk, brine-preserved gherkins (HS 071140)—primarily from India and Turkey—to repack and add value (e.g., jarring and re-brining/flavoring), then re-exports them as vinegar-pickled gherkins (HS 200110).
- At the same time, **Spain’s domestic cucumber output is under strain due to thrips pressure in Almería and adverse winter weather** (Dec 2025–Jan 2026), contributing to an estimated ~15% yield decline in the 2025/26 season.

*Note: MY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates & export trends.; HS code: 071140*

# Major exporters of Cucumber and Gherkins

Top 5 exporters (prepared or preserved by vinegar or acetic acid)



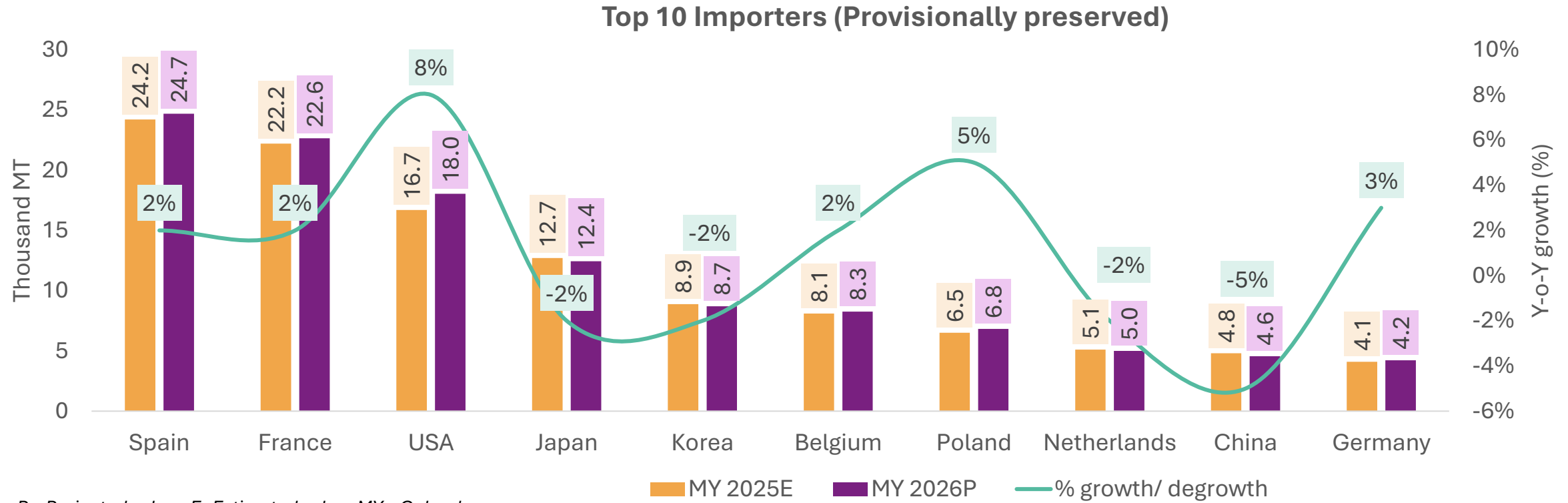
P – Projected value; E – Estimated value; MY – Calendar year

MY 2025E MY 2026P % growth/degrowth

- Global exports of cucumbers & gherkins (prepared/preserved in vinegar or acetic acid) is projected to **grow 3-6% in MY26P, led majorly by India, Netherlands, and Germany.**
- Turkey’s drought-driven reduction in supply is expected to create a lasting market gap in the EU, where demand for imports is rising by 3–4% annually in value. India is well-positioned to capitalize on this opportunity, supported by the newly commissioned Freshara Unit II processing facility in FY25, which will drive further volume growth.
- In 2024–25, German exports moved from focusing on volume to emphasizing value, as premium products like **Spreewald Protected Geographical Indication items that includes organic gherkins**, and innovative new **Kühne flavors** achieved **higher profit margins.**

Note: MY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates & export trends HS code: 200110

# Major importers of Cucumber and Gherkins



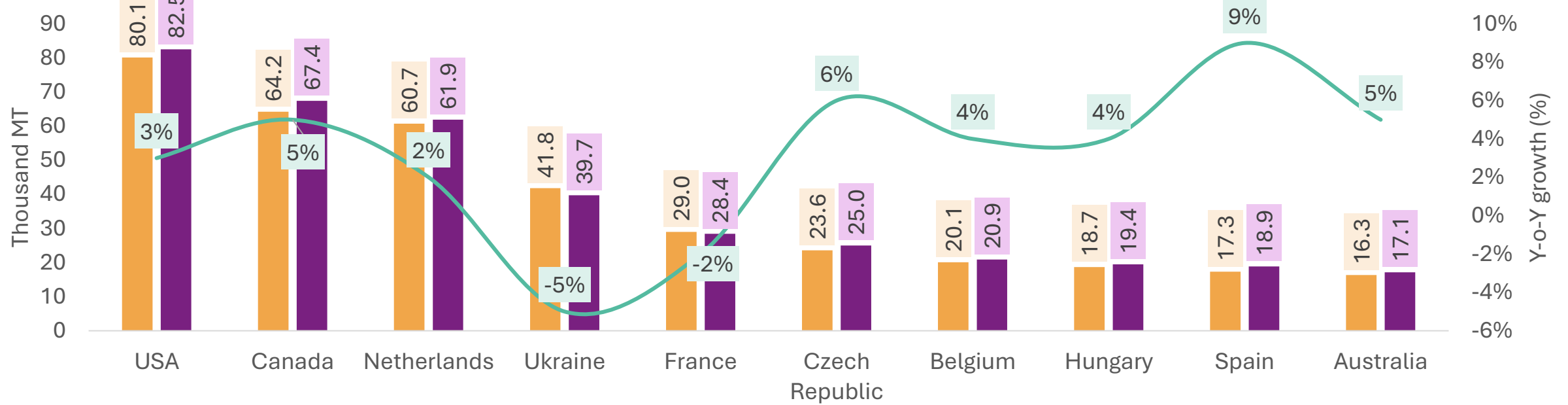
*P – Projected value; E – Estimated value; MY – Calendar year*

- Countries covered in the **chart account for ~80% of global imports** of provisionally preserved cucumbers & gherkins
- Global imports expected to grow by 5–7% in MY26, driven by higher demand from United States, Poland, and France.
- U.S. imports surged 65% in MY25 till Q3 compared to MY24 till Q3, largely due to strong domestic demand, also ease of tariffs on India recently, expected to boost imports in MY2026.
- Rising demand from Poland’s<sup>1</sup> processing industry, coupled with tight domestic supply and higher input costs, has increased reliance on imports, pushing volumes up ~5% to ~6.8 TMT in 2026

*Note: MY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates & export trends.; HS code: 071140  
Source 1: [Freshplaza Newsletter](#)*

# Major importers of Cucumber and Gherkins

Top 10 Importers (prepared or preserved by vinegar or acetic acid)



P – Projected value; E – Estimated value; MY – Calendar year

MY 2025E

MY 2026P

% growth/ degrowth

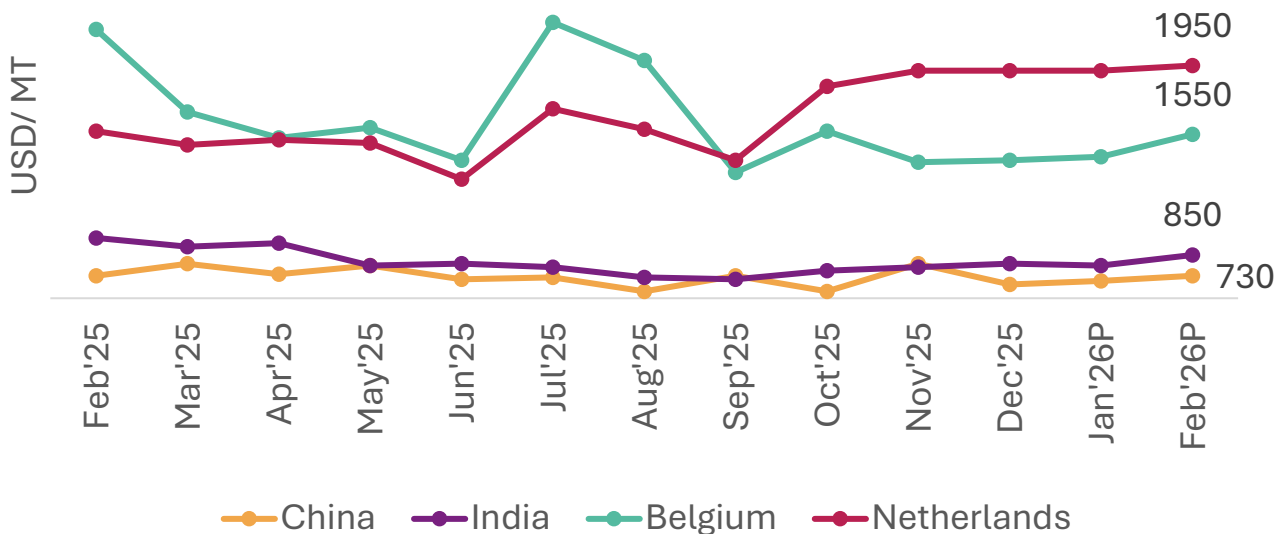
- The countries shown account for **~65% of global imports** of cucumbers & gherkins preserved in vinegar.
- Global import volumes **expected to rise by 10-12% in MY2026**; EU makes up 55–60% of global import value for RTE products.
- **U.S. imports** are projected to **rise** by **~3%** in **MY26**, supported by **sustained demand** from the **expanding domestic pickle industry** furthermore, **Vietnam's** emergence as an additional supplier **strengthens** supply availability and supports **import growth**.
- Netherlands imports are expected to grow by **2-3% (MY 2025E – 26P)**, reflecting steady re-export and distribution demand within the EU
- EU demand also set to grow marginally, offering opportunities for Indian exporters.

Note: MY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates & export trends; HS code: 200110



# Export prices forecast – Fundamental analysis

Export price trend (Provisionally preserved)



Price outlook for next quarter (MAM) 2026

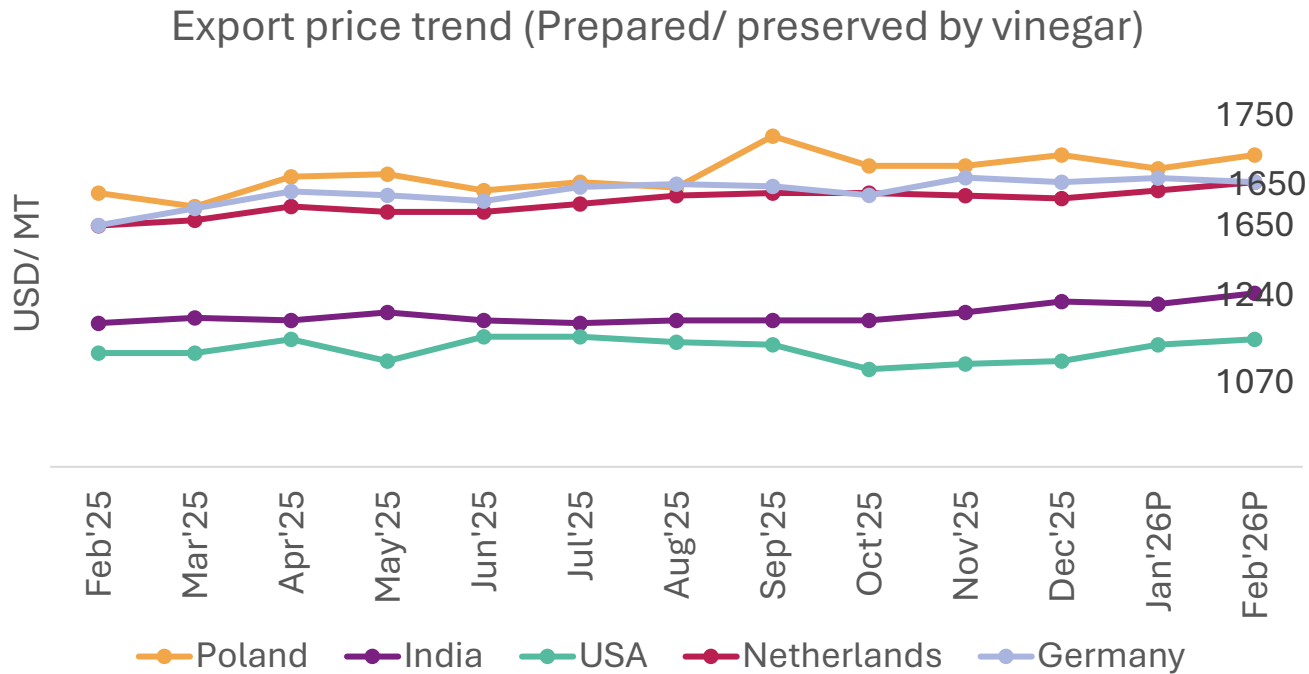
Countries	Feb'26 P Price (USD/MT)	Feb'25 Price (USD/MT)	%age change	Price direction	Average price range for MAM (USD/MT)
China	730	730	7%	Sideways	720-760
Netherlands	1950	1570	24%	Bullish	1950-2050
India	850	950	-11%	Bullish	850-900
Belgium	1550	2160	-28%	Bullish	1560-1700

- Global export prices of cucumbers & gherkins in early 2026 show a divergent trend, with **European markets** (Netherlands, Belgium) expected to **witness firm prices** during Feb'26, due to tight greenhouse supply and elevated energy costs, while other origins remain relatively stable.
- China's prices are expected to remain largely stable during MAM**, supported by balanced supply-demand dynamics and steady regional exports, with prices likely to hover around USD 720–760/MT.
- India's export prices are likely to remain firm during MAM**, supported by stable demand from the US and EU for processed gherkins, pricing remains competitive due to ample supply.
- Overall prices are expected to remain sideways to mildly bullish during MAM, with tight European supply supporting prices, while increased availability from low-cost producers capping significant upside.

Note: Forecasted price includes findings from primary interactions and estimations & Export prices are referred from ITC trade map; HS Code: 071140

Note: Price forecasting is based on the fundamental analysis. \* MAM stand for March, April & May

# Export prices forecast – Fundamental analysis



Price outlook for next quarter (MAM) 2026					
Countries	Feb'26 P Price (USD/MT)	Feb'25 Price (USD/MT)	%age change	Price direction	Average price range for MAM (USD/MT)
Poland	1750	1610	9%	Bullish	1750-1850
India	1240	1130	10%	Bullish	1250-1350
USA	1070	1020	5%	Sideways	1040-1150
Netherlands	1650	1490	11%	Sideways	1650-1700
Germany	1650	1491	11%	Sideways	1650-1700

- European markets (Netherlands, Germany, Poland) largely function as re-export and distribution hubs, with prices remaining in the premium band due to value addition, processing, and strong intra-EU demand. Poland: Prices expected to remain bullish during MAM at USD 1,750–1,850/MT. Netherlands & Germany: Prices likely to stay range-bound at USD 1,650–1,700/MT during MAM, reflecting their role in redistribution and premium positioning.
- India's exports are primarily demand-driven from the US and EU, with pricing supported by processing quality and steady demand. Prices expected to trade at USD 1,250–1,350/MT during MAM.
- US operates at a relatively lower price band, supported by domestic production and shorter supply chains, keeping it more competitive in pricing. Prices likely to remain range-bound at USD 1,040–1,150/MT during MAM.

Note: Forecasted price includes findings from primary interactions and estimations & Export prices are referred from ITC trade map; HS Code: 200110

Note: Price forecasting is based on the fundamental analysis. \* MAM stand for March, April & May

**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



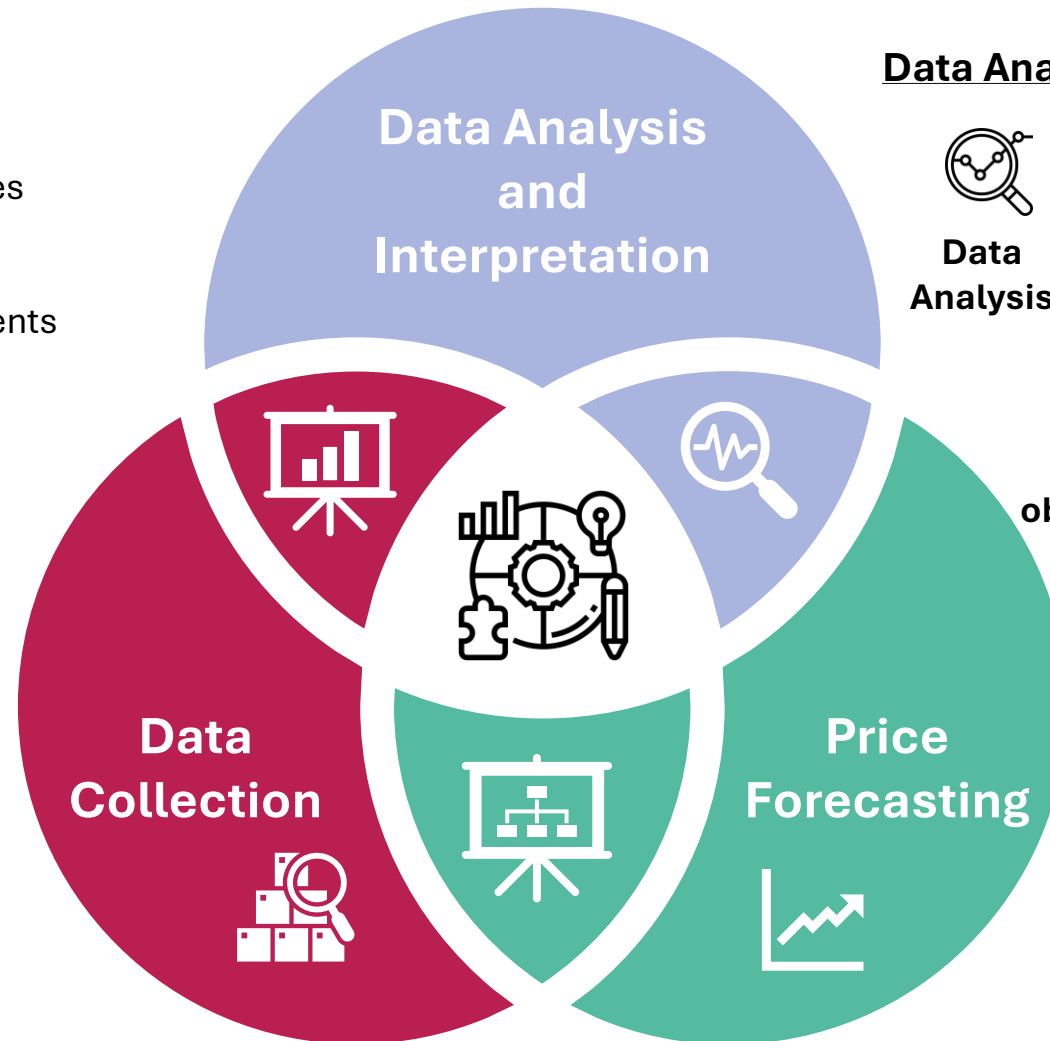
### Sources

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports



### PoliMY 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
- PoliMY impact analysis
- Stakeholder consultations



### Key objectives

- Production trends
- Trade dynamics
- PoliMY implications

## Price Forecasting

- Historical Trend & Seasonality of FOB prices
- 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 poliMY assessments.*