

Crisil

a company of S&P Global



Monthly dashboard - Cucumber & Gherkins

HS Code: 071140 & 200110

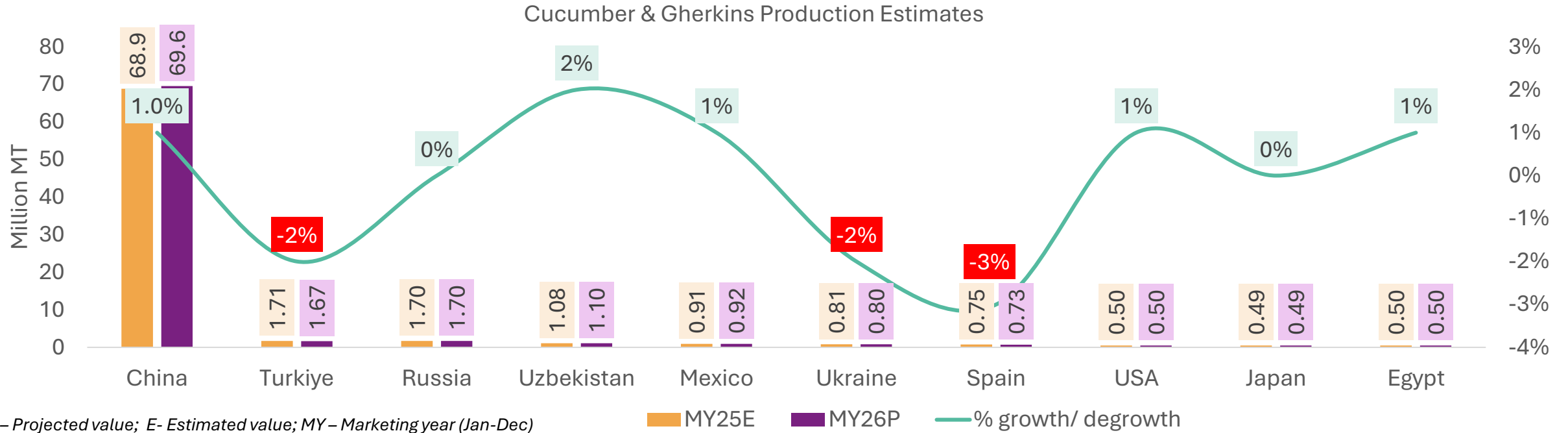
March 2026



Production Trends



Production Estimate of Major Producing Countries



- Top 10 countries **account for ~90% of cucumber & gherkin output; China alone contributes ~80%.**
- **Global production²** is expected to reach **~85-90 MMT in MY26P**, growing at a CAGR of 1-2% over a period of 5 years, reflecting steady expansion driven by yield improvements and protected cultivation.
- In China, cucumber belt spans central and northern provinces. Greenhouse area continues to expand, stabilizing yield and reducing seasonality in these regions.
- 2025 had been one of the driest years in the history of Turkey¹. Widespread drought across Turkey, especially in central and southern cucumber-growing regions, has caused severe irrigation shortages and reduced productivity. As a result, cucumber and gherkin production is expected to decline in 2026 as well, on low base.

Note: FAOSTAT; MY25 acreage estimated and MY26 projected based on historical trends and secondary research

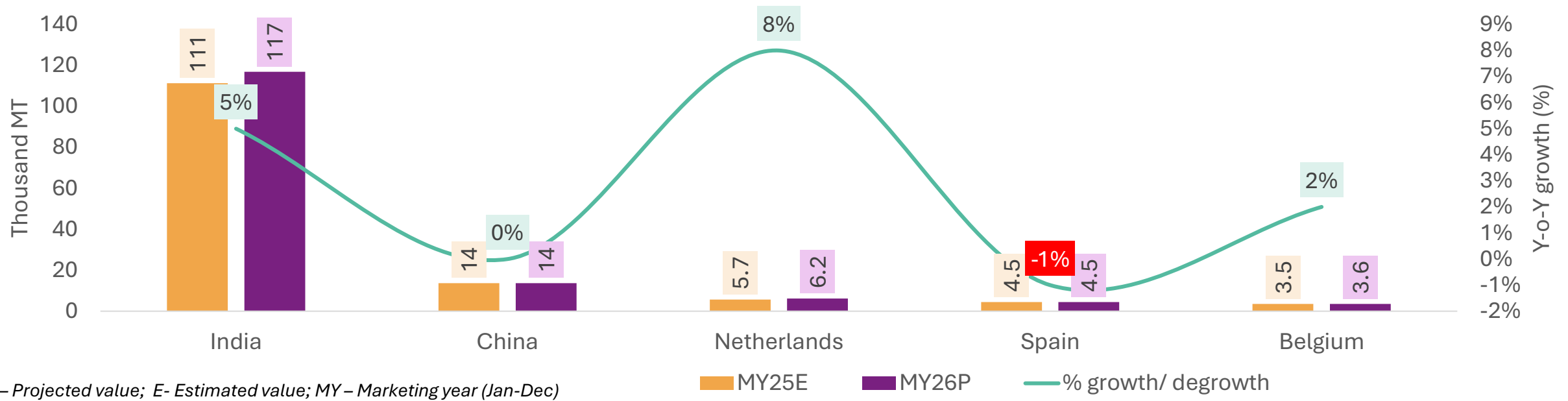
1: [Türkiye faces worst drought in 50 years as rainfall drops 27% - Türkiye Today](#); 2. FAOSTAT Estimates



Export Trends and Price Outlook

Major Exporters of Cucumber and Gherkins

Top 5 Exporters (Provisionally preserved)



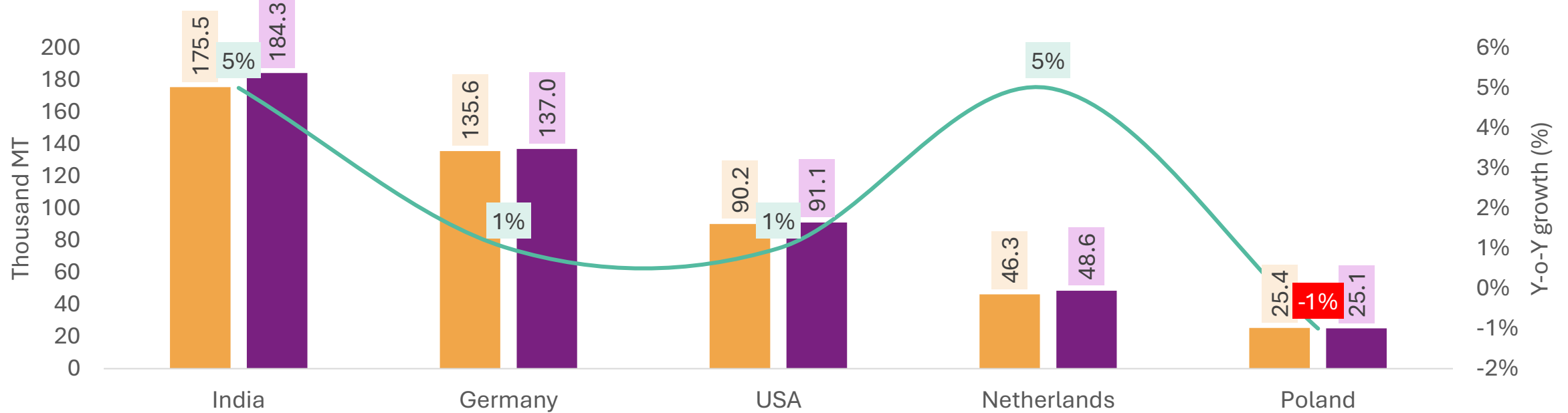
- The top 5 exporting countries account for ~ **95% of global exports**.
- India dominates the market with a 76% share (MY25); export volumes are forecasted to grow by ~4-5% in MY26P.
- **Exports from the Netherlands¹** are projected to grow by ~7-8% in MY26P, driven by advanced greenhouse cultivation ensuring consistent, high-quality cucumbers and strong EU demand supporting steady cross-border trade.
- 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's² domestic cucumber output is under strain due to thrips pressure in Almería and adverse winter weather** (Dec 2025–Jan 2026), contributing to yield decline in the 2025/26 season.

Note: ITC Trade Map; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends; HS code: 071140

Source: 1. [Exports in the Netherlands](#); 2. [Spain's domestic production](#)

Major Exporters of Cucumber and Gherkins

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



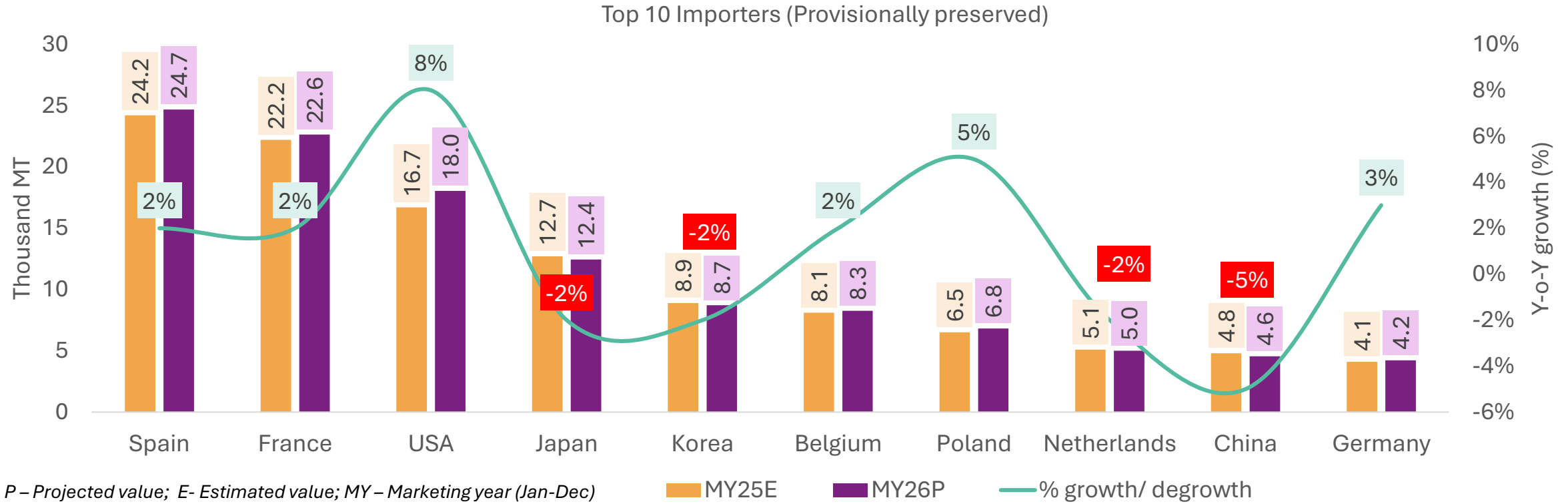
P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec)

MY25E MY26P % growth/degrowth

- Global exports of cucumbers & gherkins (prepared/preserved in vinegar or acetic acid) is projected to **grow ~4-6% in MY26P, led majorly by India, Netherlands, and Germany.**
- **Turkey’s drought-related supply decline** is anticipated to leave a **persistent gap in the EU market**, where **import demand is increasing by 3–4% each year in value.** India is poised to **capitalize** on this opportunity, with the commissioning of the **new Freshara Unit II processing facility** which is expected to **boost export volumes further.**
- **Germany’s export** is expected to rise, driven by **supply gaps in Southern Europe** and **rising intra-EU demand for processed gherkins,** positioning it as a stable, high value supplier amid weather-induced production volatility.

Note: ITC Trade Map; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends HS code: 200110

Major Importers of Cucumber and Gherkins



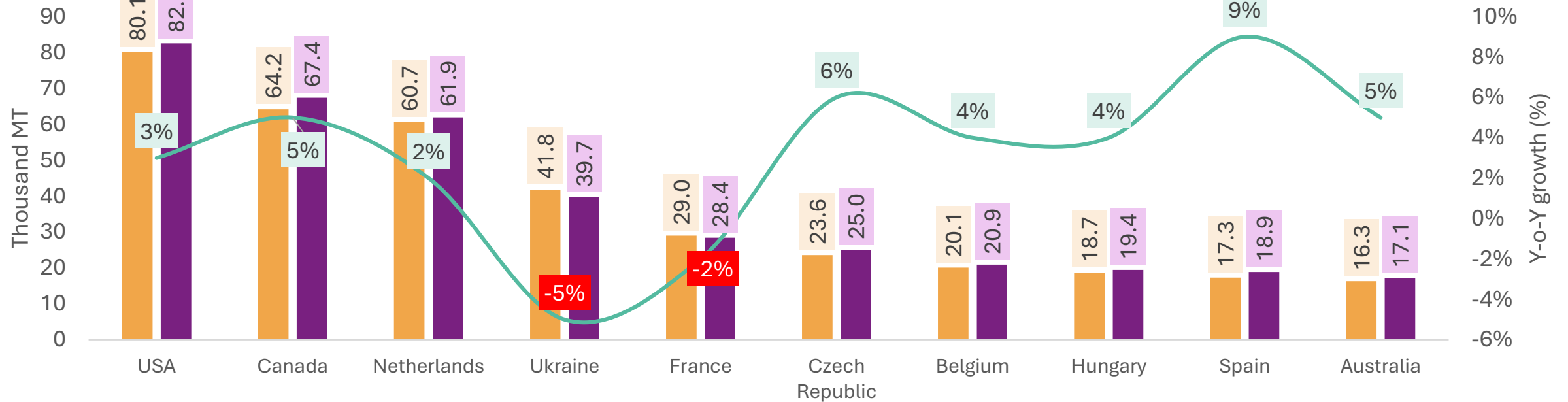
- Countries covered in the chart account for **~80% of global imports** of provisionally preserved cucumbers & gherkins. Global imports expected to grow by **~5–7% in MY26P**, driven by higher demand from the US, Poland, Spain and France.
- **Japan's² cucumber imports are projected to decline** by ~1–2% in MY26P, as increased domestic production and greater local sourcing by the traditional tsukemono pickling industry reduce reliance on imports.
- **Imports are expected to be robust for the U.S.** In MY25, imports grew by 65% during Q1–Q3 compared to the same period in MY24, and in the current year is projected to grow further, supported by strong domestic demand and the recent easing of tariffs on India.
- Rising demand from Poland's¹ processing industry, coupled with tight domestic supply and higher input costs, has increased reliance on imports, expected to push volumes up by ~5% in MY26P.

Note: : ITC Trade Map; MY25E import volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends. HS code: 071140

Source 1: [Freshplaza Newsletter](#); 2. [Japan's imports](#)

Major Importers of Cucumber and Gherkins

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



P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec)

MY25E

MY26P

% growth/ degrowth

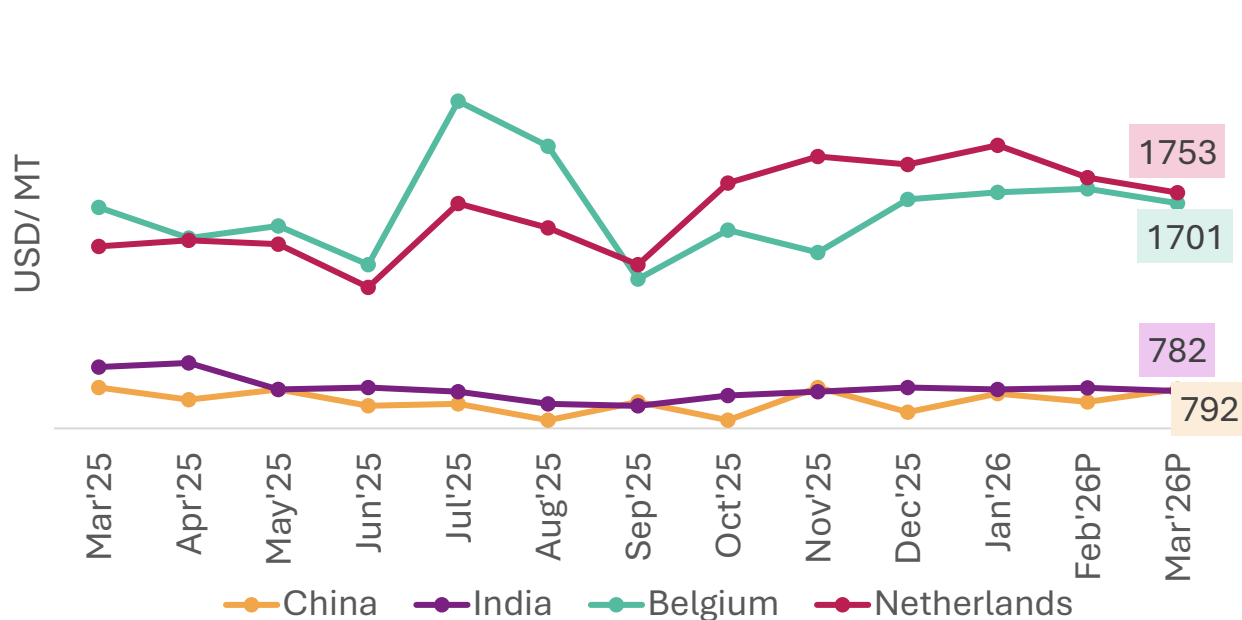
- The countries shown account for **~63% of global imports** of cucumbers & gherkins preserved in vinegar.
- Global import volumes **expected to rise by ~3-4% in MY26P**; EU makes up 55–60% of global import value for RTE products.
- **U.S. imports** are projected to **rise** by **~3%** in **MY26P**, 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% (MY26P)**, driven by steady re-export and distribution demand within the EU.
- **Canada’s¹ imports** are expected to **rise by ~5%** as domestic supply stagnates, with snacking cucumber (long and mini) demand up **~13–14% YoY** and cocktail cucumber demand up **~25% YoY**. Import prices are projected to rebound to **~USD 1.61/kg** in **MY26P**, encouraging higher import volumes.

Note: : ITC Trade Map; MY25E import volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends; HS code: 200110

Source: 1. [Canada’s imports](#)

Export Prices Forecast – Fundamental Analysis

Export price trend (Provisionally preserved)



Price outlook for next quarter (AMJ) 2026					
Countries	Mar'26 P Price (USD/MT)	Mar'25 Price (USD/MT)	%age change	Price direction	Average projected price range for AMJ (USD/MT)
China	792	800	-1%	Bearish	730-790
Netherlands	1753	1490	18%	Bearish	1590-1650
India	782	900	-13%	Sideways	730-790
Belgium	1701	1680	1%	Bullish	1770-1830

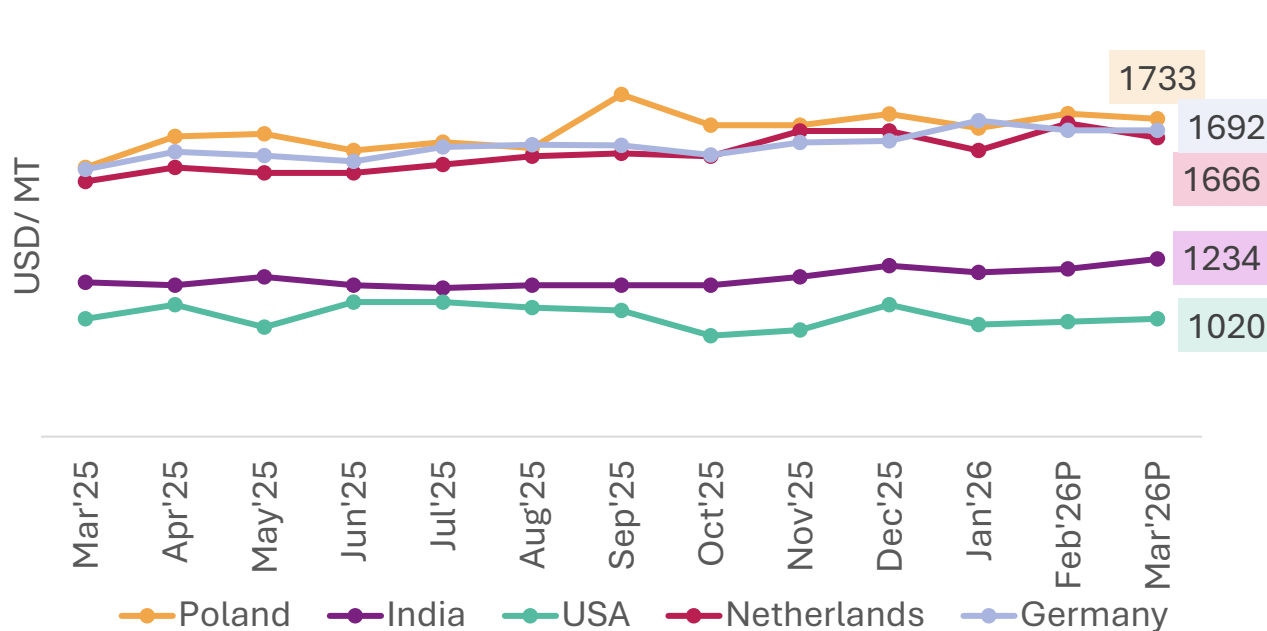
- Global export prices of cucumbers & gherkins in early 2026 show a divergent trend, with **European markets** (Netherlands, Belgium) expected to **witness firm prices** during Mar'26 Y-o-Y, due to tight greenhouse supply and elevated energy costs, while other origins remain relatively stable.
- China's prices are expected to soften in upcoming quarter**, supported by balanced supply-demand dynamics and stable regional exports, with prices likely to hover around USD 730–790/MT.
- India's prices** are expected to remain **range-bound** as **peak seasonal arrivals increase short-term supply**, while **steady export growth**, resilient **US/EU demand**, and **tightening global supply** from **weather disruptions** provide **stable support**.
- Netherlands prices rose ~18% YoY (Mar'26)** due to **winter greenhouse supply constraints** and **elevated energy costs**; however, with **seasonal production recovery**, supply is expected to outpace demand, **keeping prices bearish**.

Note: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates; HS Code: 071140

Note: Price forecasting is based on the fundamental analysis. * AMJ stand for April, May, and June 2026

Export Prices Forecast – Fundamental Analysis

Export Price Trend (Prepared/ preserved by vinegar)



Price outlook for next quarter (AMJ) 2026					
Countries	Mar'26 P Price (USD/MT)	Mar'25 Price (USD/MT)	%age change	Price direction	Average projected price range for AMJ (USD/MT)
Poland	1733	1560	11%	Bullish	1740-1800
India	1234	1150	7%	Sideways	1210-1270
USA	1020	1020	0%	Sideways	970-1030
Netherlands	1666	1510	10%	Sideways	1620-1680
Germany	1692	1553	9%	Sideways	1650-1710

- 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 in upcoming quarter at USD 1,740–1,800/MT. For Netherlands & Germany prices are likely to stay range-bound at USD 1,620–1,750/MT during the same period, reflecting their role in redistribution and premium positioning.
- **India's exports** are mainly driven by **demand** from **the US and EU**, with prices sustained by **high processing quality** and **consistent demand**. Prices are projected to remain between **USD 1,210 -1,270/MT** during **April to Jun'26**.

Note: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates; HS Code: 200110

Note: Price forecasting is based on the fundamental analysis. * AMJ stand for April, May, and June 2026

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



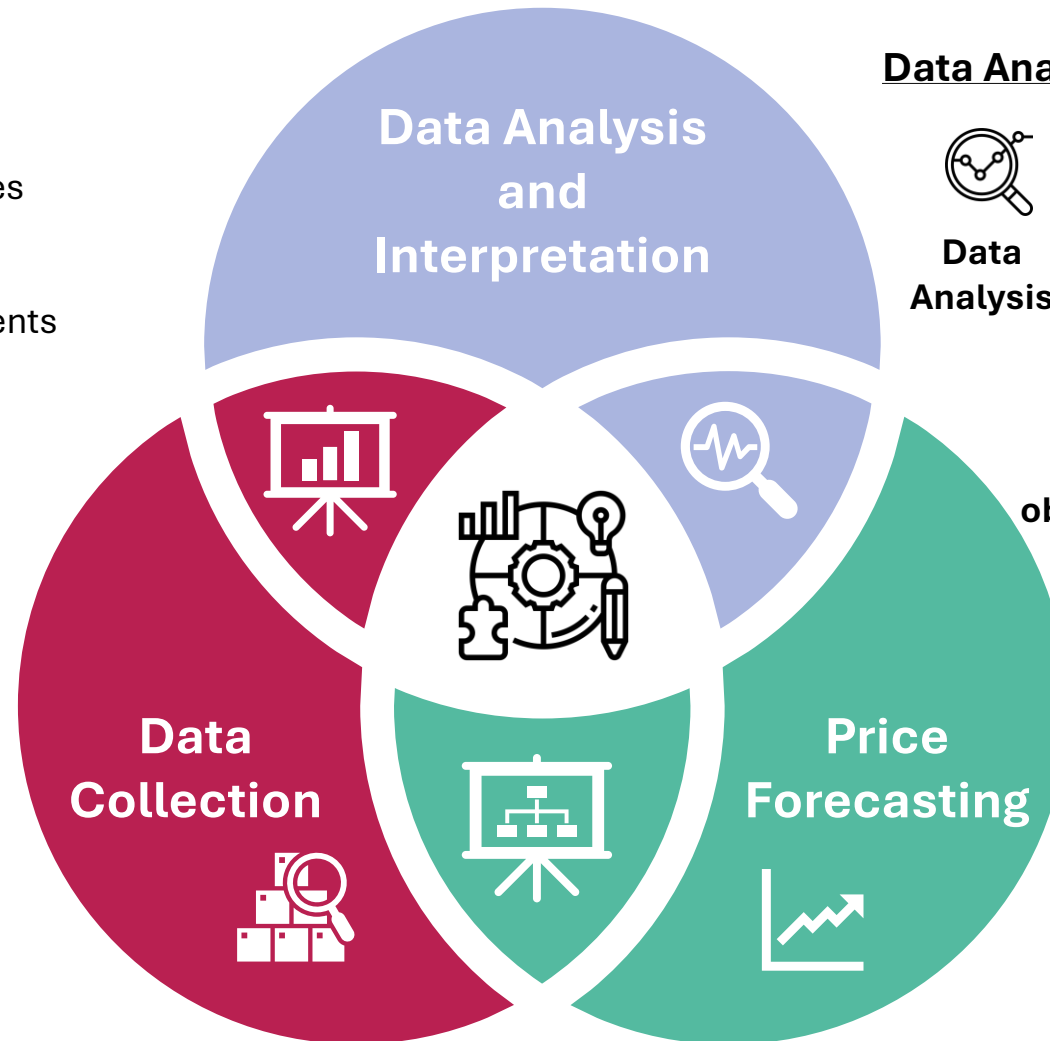
Sources

- 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.