

Monthly dashboard - Cucumber & Gherkins

**HS Code: 071140 &
200110**

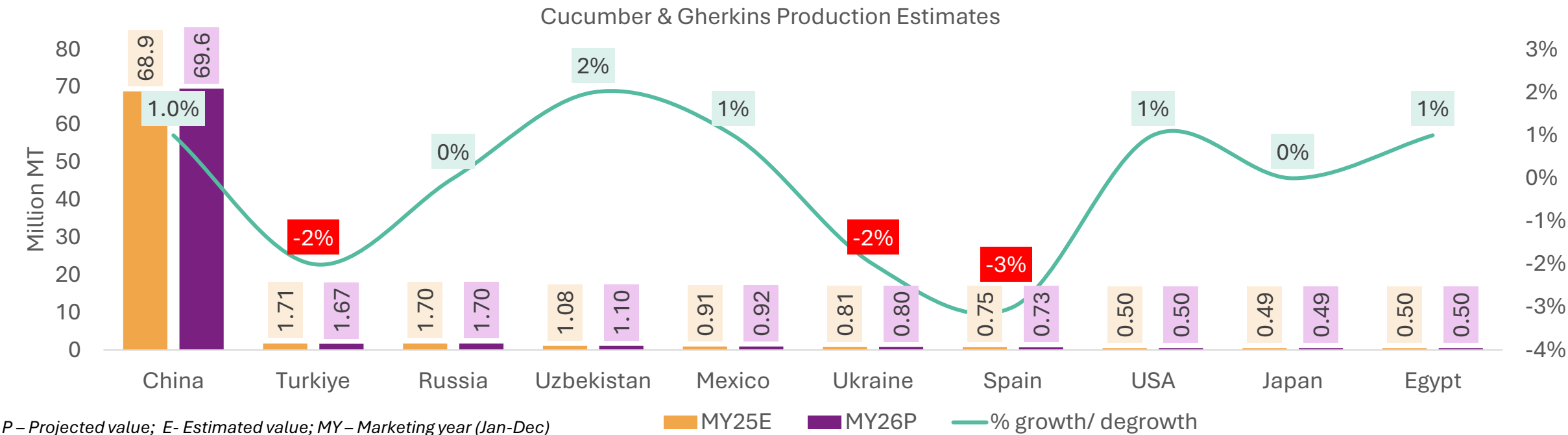
April 2026



Production Trends



Production Estimate of Major Producing Countries



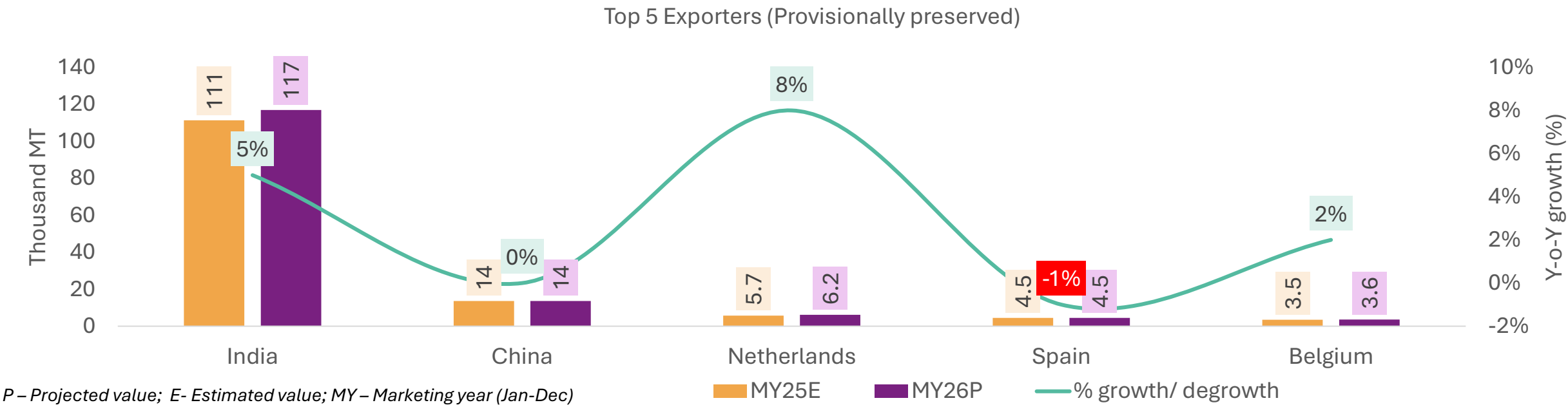
- Top 10 countries **account for ~90% of cucumber & gherkin output; China alone contributes ~80%.**
- **Global production²** is expected to reach **~85-90 MMT in MY26P**, growing at a CAGR of 1-2% over a period of 5 years, reflecting steady expansion driven by yield improvements and protected cultivation.
- 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. Due to continued water stress and irrigation constraints, cucumber & gherkins production is expected to remain under pressure and decline in 2026, despite the low production base in 2025.

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

A large container ship is shown from an aerial perspective, sailing on a deep blue ocean. The ship's deck is covered with numerous colorful shipping containers in shades of red, yellow, blue, and green, stacked in neat rows. The ship's hull is dark, and its superstructure is white. The ship is moving towards the right, leaving a white wake behind it. In the background, a smaller ship is visible on the horizon under a clear blue sky with some distant landmasses.

Export Trends and Price Outlook

Major Exporters of Cucumber and Gherkins



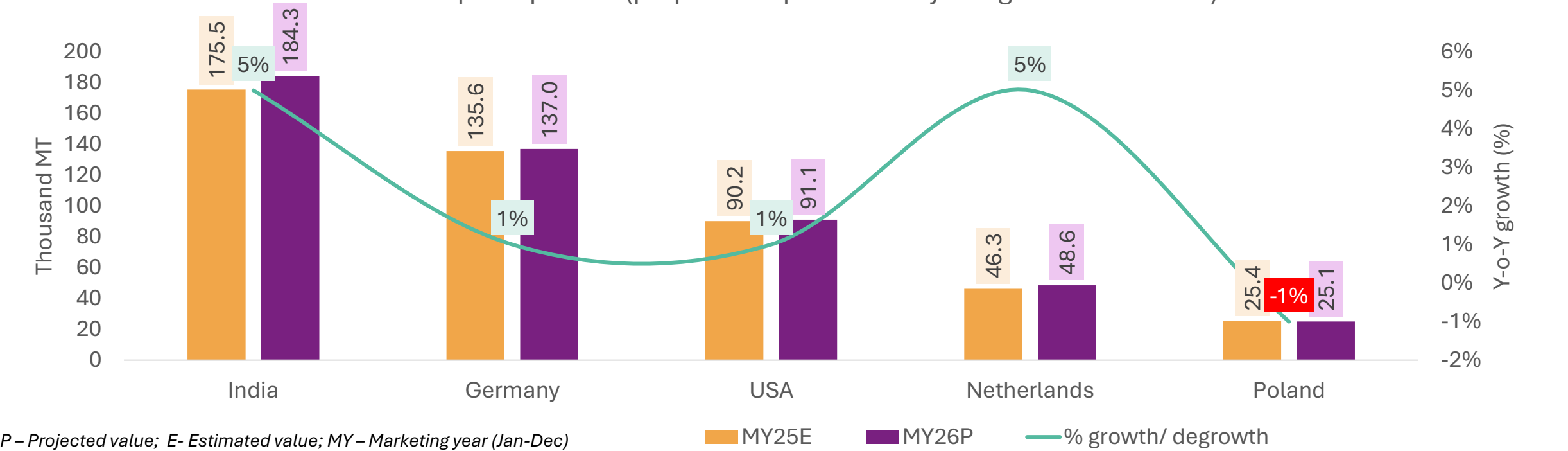
- The top 5 exporting countries account for ~ **95% of global exports**.
- India dominates the market with a 76% share (MY25); export volumes are forecasted to grow by ~4-5% in MY26P.
- **Exports from the Netherlands¹** are projected to grow by ~7-8% in MY26P, driven by advanced greenhouse cultivation 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).
- Spain's MY26P cucumber exports are expected to decline due to domestic yield strain from Almería thrips and adverse winter weather (Dec 2025–Jan 2026) in the 2025/26 season. Additionally, Spain's imports from Turkey face pressure from Turkish irrigation challenges.
- **Belgium's exports** are expected to see a **rise** of ~2% in **MY26P** with volumes anticipated to rise from **3,500 to 3,600 MT**, driven by its **surge** as the **fastest growing EU cucumber exporter** (+27.6% in 2025) and **strong intra-EU re-export demand**.

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)

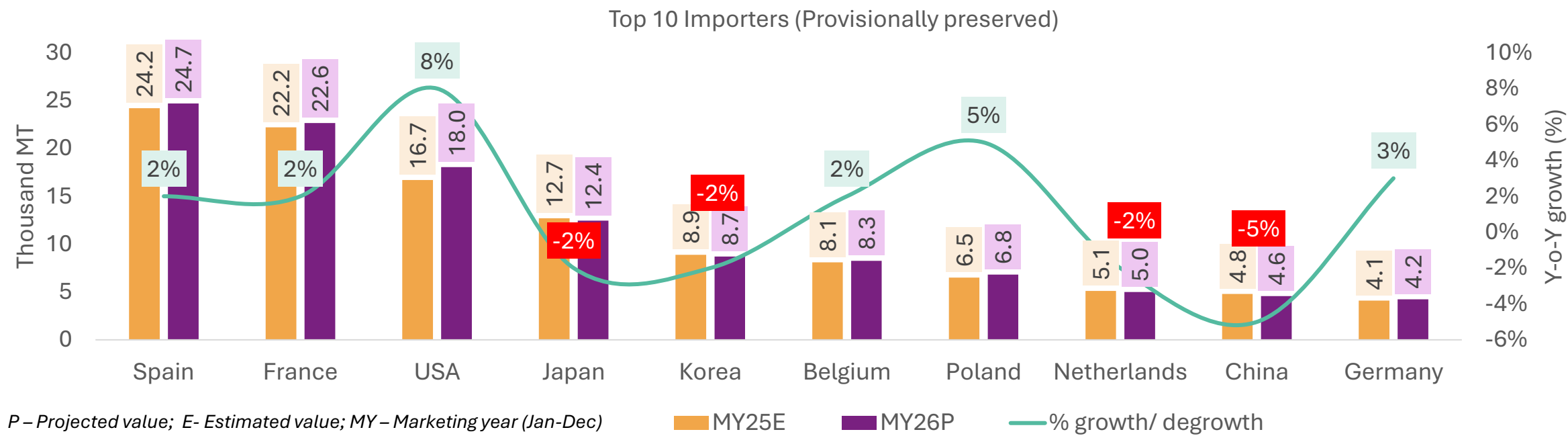


- Global exports of cucumbers & gherkins (prepared/preserved in vinegar or acetic acid) is projected to **grow ~4-6% in MY26P, led majorly by India, Netherlands, and Germany.**
- **Turkey’s drought-related supply decline** is anticipated to leave a **persistent gap in the EU market**, where **import 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.**
- **India’s exports¹** are expected to **inch-up** by **~5% in MY26P**, driven by **expanding contract farming acreage** across **Karnataka, Telangana, and Andhra Pradesh**, combined with rising **US demand** for **Indian vinegar-preserved gherkins**, which together sustain strong volume growth.

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

Source: 1. [India’s exports](#)

Major Importers of Cucumber and Gherkins



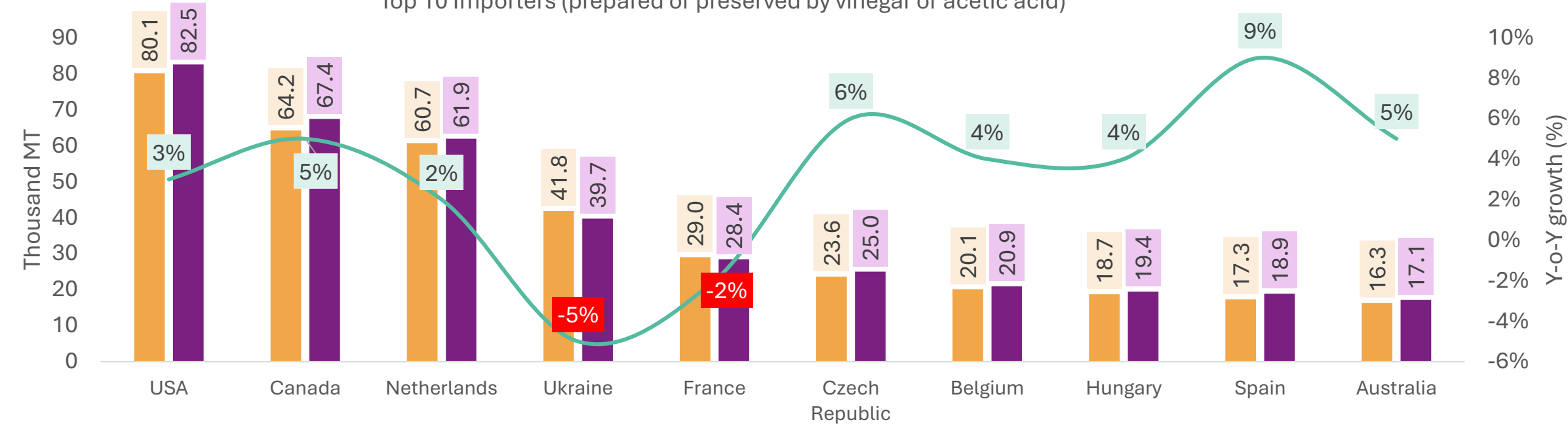
- Countries covered in the chart account for **~80% of global imports** of provisionally preserved cucumbers & gherkins. Global imports expected to grow by **~5–7% in MY26P**, driven by higher demand from the US, Poland, Spain and France.
- Rising demand from Poland’s¹ processing industry, coupled with tight domestic supply and higher input costs, has increased reliance on imports, expected to push volumes up by ~5% in MY26P.
- **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.
- **Korea’s³ cucumber and gherkin imports are expected to decline** as **smart greenhouse expansion** boosts domestic supply. Horticulture output **rose 33%** since smart farming launched, with over **60% of farms adopting IoT-enabled greenhouses** by **early 2026**, reducing import dependency.

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](#); 3: [Korea’s imports](#)

Major Importers of Cucumber and Gherkins

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



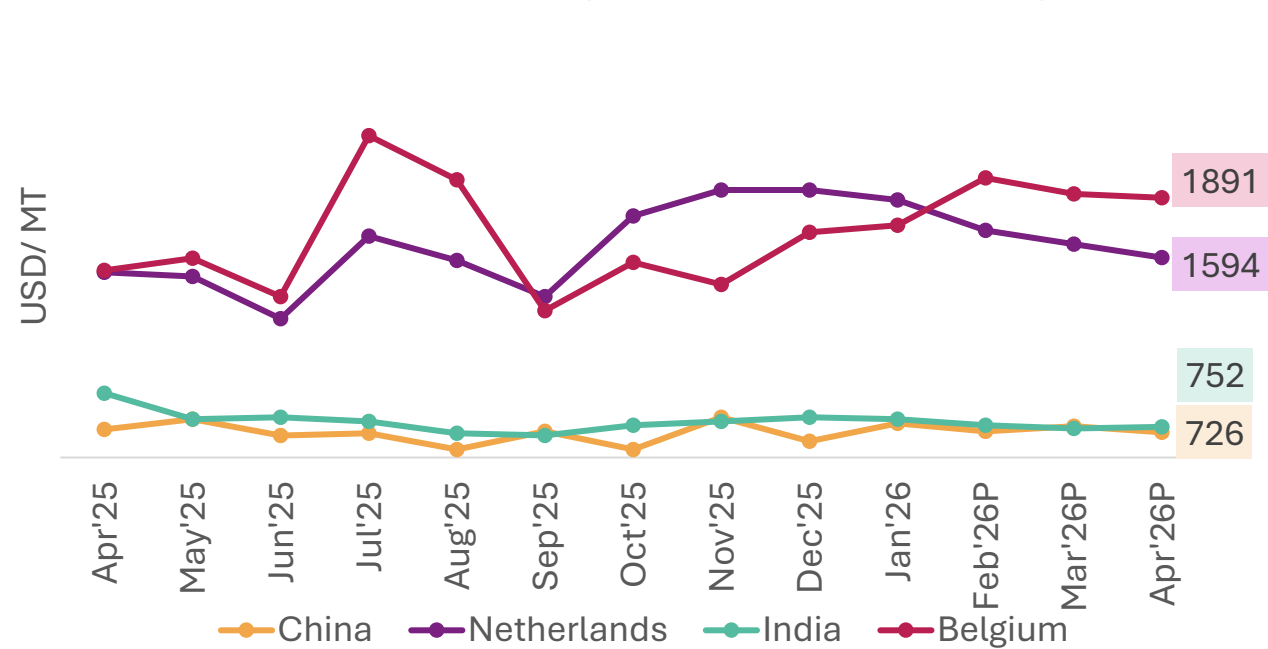
P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec) MY25E MY26P % growth/ degrowth

- 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 by **7% YoY 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)

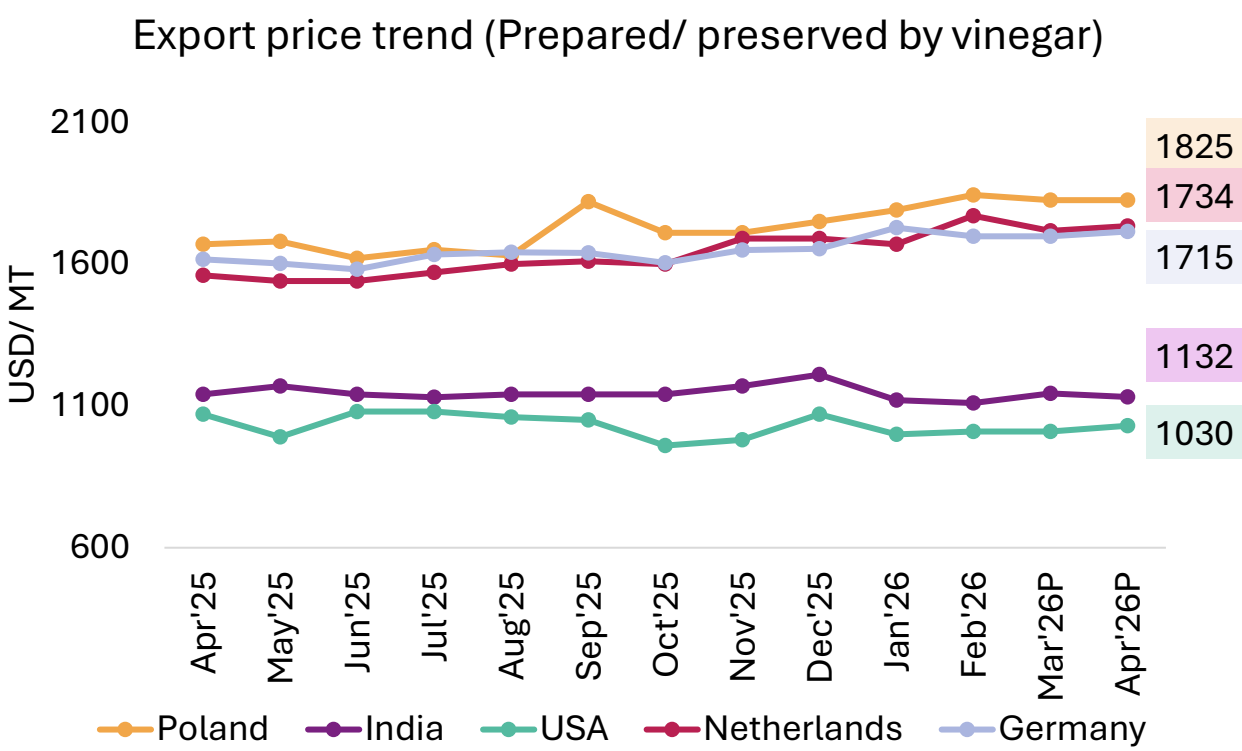


Price outlook for next quarter (MJJ) 2026					
Countries	Apr'26 P Price (USD/MT)	Apr'25 Price (USD/MT)	%age change	Price direction	Average projected price range for MJJ (USD/MT)
China	726	740	-2%	Sideways	690-750
Netherlands	1594	1520	5%	Bearish	1430-1490
India	752	920	-18%	Sideways	710-770
Belgium	1891	1530	24%	Bullish	1930-1990

- Global export prices of cucumbers & gherkins in early 2026 show a divergent trend, with **European markets** (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 remain sideways in upcoming quarter**, supported by balanced supply-demand dynamics and stable regional exports, with prices likely to hover around USD 690-750/MT.
- India's prices are expected to remain sideways** 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 ~5% YoY (Apr'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 Feb 2026); prices for Mar and Apr 2026 are estimated based on seasonal patterns, trade trends and trade estimates; HS Code: 071140
Note: Price forecasting is based on the fundamental analysis. * MJJ stand for May, June, and July 2026

Export Prices Forecast – Fundamental Analysis



Price outlook for next quarter (MJJ) 2026					
Countries	Apr'26 P Price (USD/MT)	Apr'25 Price (USD/MT)	%age change	Price direction	Average projected price range for MJJ (USD/MT)
Poland	1825	1670	9%	Bullish	1860-1920
India	1132	1140	-1%	Sideways	1120-1180
USA	1030	1070	-4%	Sideways	950-1030
Netherlands	1734	1560	11%	Bearish	1640-1700
Germany	1715	1616	6%	Bearish	1640-1700

- The European markets of the Netherlands, Germany, and Poland primarily serve as re-export and distribution centers, with prices staying within the premium range driven by value addition, processing activities, and robust intra-EU demand.
- Poland prices expected to remain bullish in upcoming quarter at ~ USD 1,860-1,920/MT. For Netherlands & Germany prices are likely to bearish at USD 1,640–1,700/MT during the same period , amid improved supply availability, competitive EU exports, and softer redistribution demand.
- **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 likely to trade sideways between **USD 1,120 -1,180/MT** during **May to Jul’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. * MJJ stand for May, June, and July 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



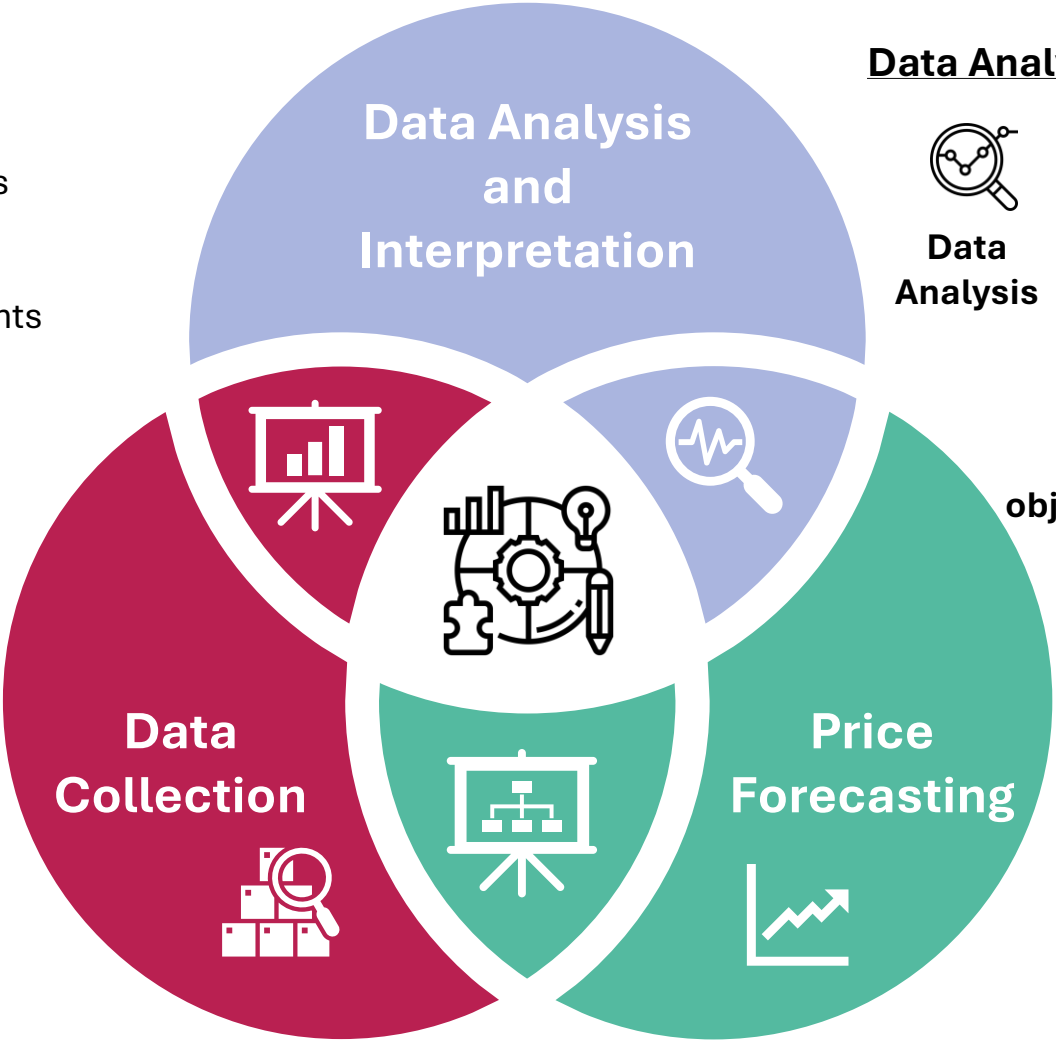
Sources

- 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.