

Monthly dashboard Potato

HS code: 0701

April 2026



Acreage and Production trends



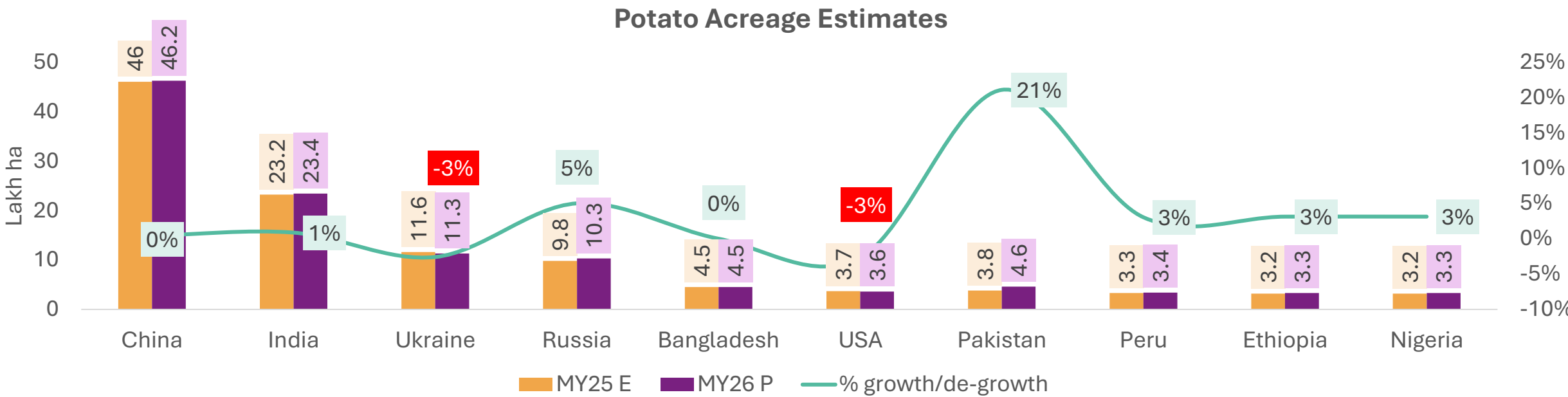
Potato Crop Calendar of Major Producing Countries

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 varies seasonally across major producers, with harvests mainly from June to October. Most countries have a single crop cycle, but China have multiple harvests—China’s North crop (Jun-July), South (Autumn) crop (Nov-Dec) and South (Winter) crop (Jan-Mar) —ensuring near year-round supply from the leading producer.
- 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.
- 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)

Acreage Estimates of Major Producing Countries



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

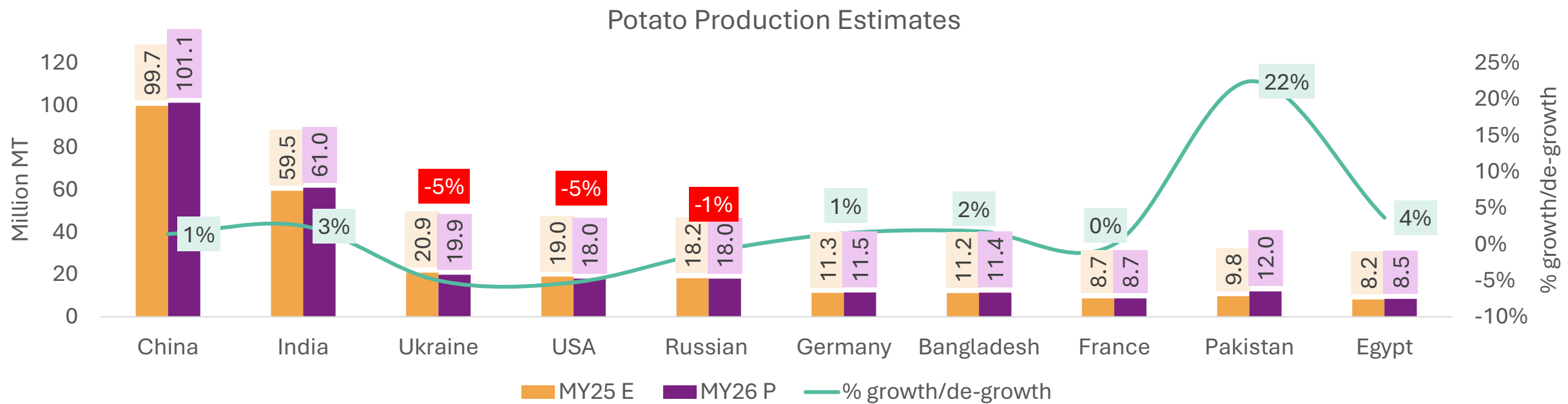
- The countries highlighted in the chart **account for nearly 66% of the world’s potato acreage**, with global potato acreage expected to marginally improve by ~1% in MY26P, on a low base and driven by better realization in MY25E.
- **The United States is projected to see a decline** in acreage due to lower contracted volumes from processors, surplus supplies, weak demand, and adverse weather conditions.
- Russia is expected to see a strong rebound (~5%) in acreage on a low base, driven by improved price realization and domestic demand. Ukraine¹ is likely to see a decline (~3%) due to supply chain disruptions, adverse weather, policy uncertainty, and weakened demand and demand-side constraints.
- **Pakistan's potato acreage² expected to surge** by ~21% to **4.62 lakh hectares** in **MY26P**, driven by a **decade-long cultivation expansion** — up **160%** since **2015-16** — supported by **strong domestic food demand** and **government-backed initiatives** to address export constraints and open **Central Asian market corridors**.

Source: Acreage for MY2025E and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT and secondary research.

India’s acreage has been referred from MoA&FW and projection is based on trends and interactions

Source 1: [Ukraine potato decline](#); 2. [Pakistan’s potato acreage](#)

Production Estimates of Major Producing Countries



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

- The countries highlighted in the chart account for **nearly 67% of global potato production**. Global output is expected to increase marginally by 1–2% year-on-year in MY26P.
- **China’s MY26P production is forecast at 101.1 MMT**, maintaining its position as the world’s leading producer. This outlook is driven by stable acreage, government food security measures, advancements in crop varieties, increased mechanization, and consistent yield improvements.
- India’s output is expected to rise to ~61 MMT (+3% YoY), marking a record level and strengthening its position as the second-largest producer globally.
- **Germany’s¹ potato production is projected to increase (1–2%)**, supported by stable acreage and improved yields across key regions such as Lower Saxony and North Rhine-Westphalia, contributing to the broader Northwest European surplus.
- **The U.S’ potato production² is projected to decline ~2-5% in CY26P**, as **drought conditions** spanning **52%** of key growing states — with **Idaho (75.5%)**, **Colorado (98.3%)** and **Oregon (70.8%)** most critically exposed — **threaten yield potential, tuber quality, and contract fulfilment**, while **input costs surge 30-33%**, further pressuring grower output decisions.

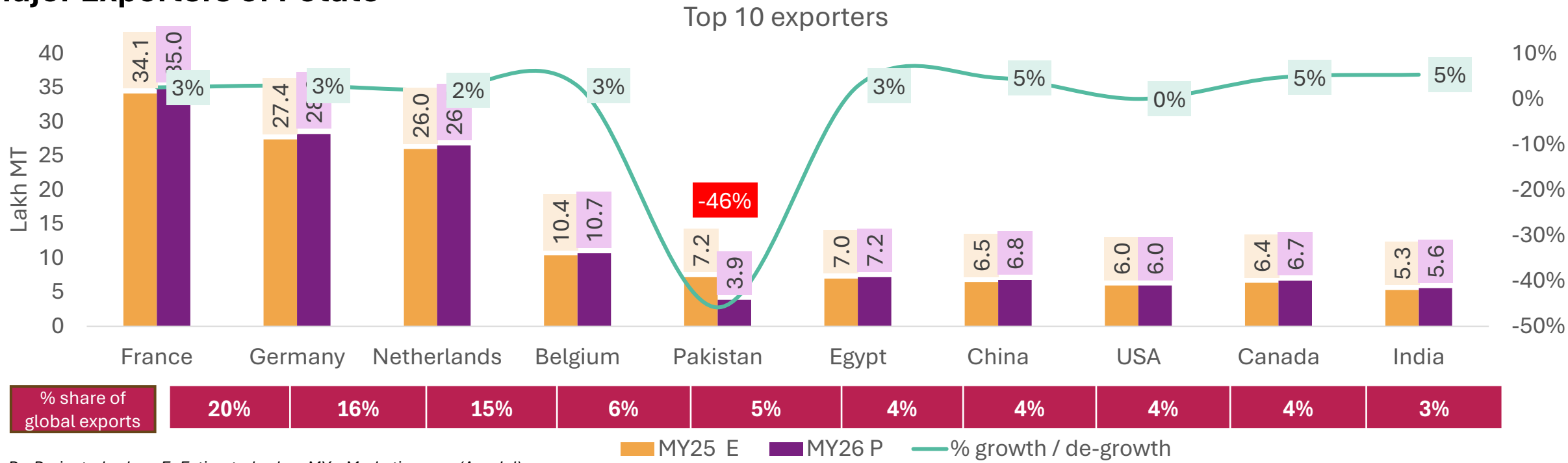
Source: Production for MY2025 and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT. India’s production has been referred from MoA&FW and projection based on trends and interactions.

1. [Germany’s production](#); 2. [USA’s production](#)

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. The ship has a white superstructure and a dark hull. In the background, a smaller ship is visible on the horizon under a clear sky. The text "Export Trends and Price Outlook" is overlaid in white on the ship's deck.

Export Trends and Price Outlook

Major Exporters of Potato



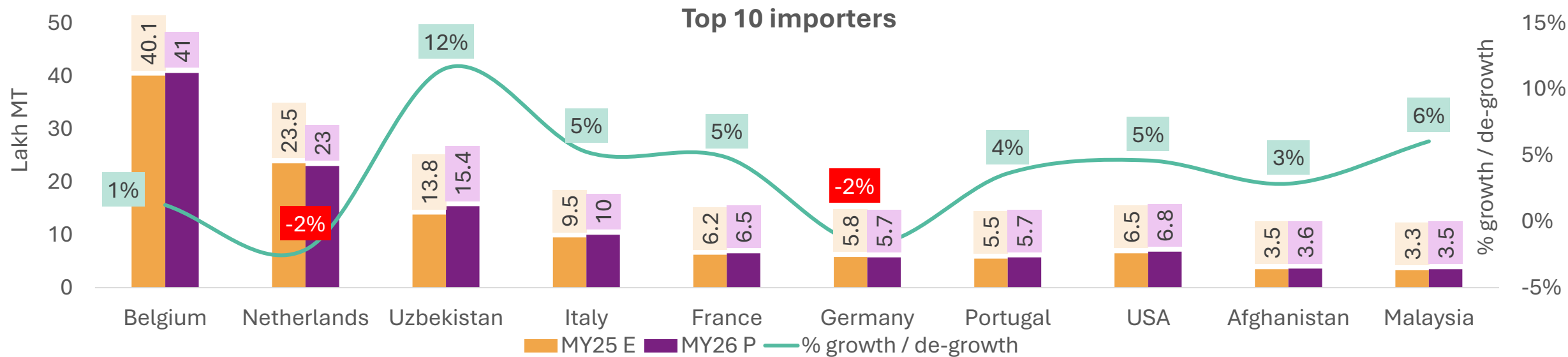
P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)

- The **countries in the chart account for about 80% of global potato exports**, with **exports for MY26P expected to rise by 2–3% year-on-year**.
- **In MY26P, Egypt is expected to maintain steady potato export momentum** to Russia, the EU, and Arab markets, supported by its early harvest window, proximity to key import destinations, and ability to supply consistent quality during seasonal supply gaps in importing countries.
- **Germany’s¹ potato exports** are expected to **increase ~3% in MY26P**, driven by **stable yields, robust cold-storage infrastructure** enabling **year-round supply consistency, broad EU market access**, and **competitive pricing** — reinforcing **Germany's position** as the **preferred supplier** across key **intra-EU trade corridors**.
- **Canada’s² exports** are **projected to grow (~5%) in MY26P**, driven by contract-based supply stability (**90-95% tied to U.S. processors**) and **growing production infrastructure investment** ,including premium equipment partnerships in key **Ontario growing regions**, reinforcing reliable export capacity.

Source: CY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable;; CY26P figures are projections based on trade estimates ,export trends and secondary research. HS code 0701

1: [Germany’s Potato exports](#) ; 2. [Canada’s exports](#);

Major Importers of Potato



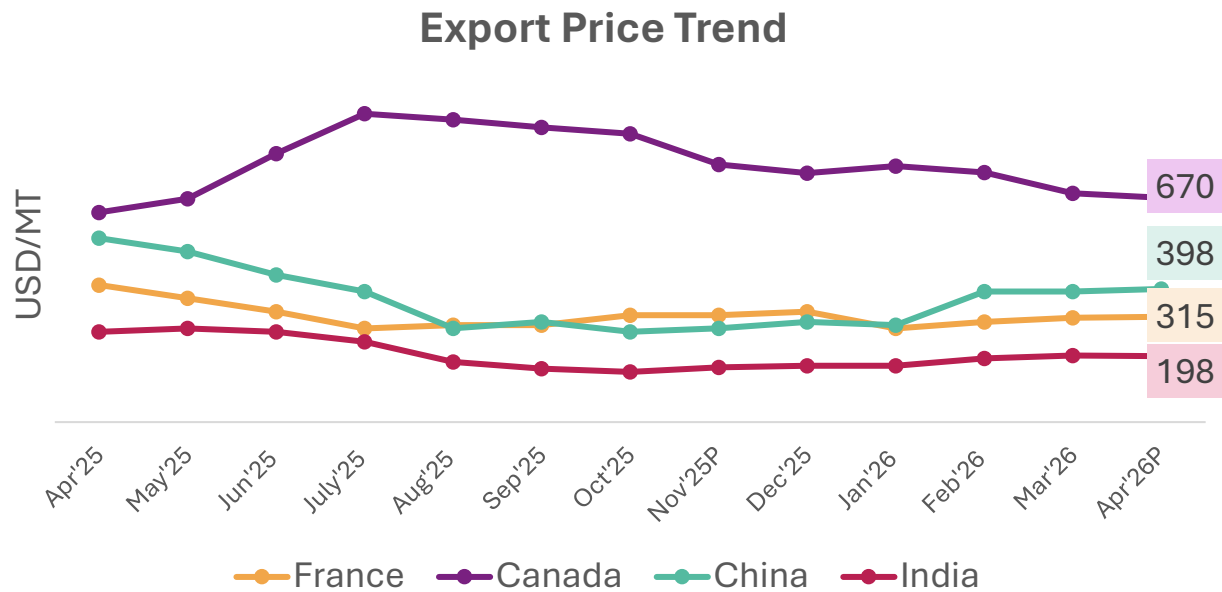
% share of global imports	22%	13%	7%	5%	3%	3%	3%	3%	2%	2%
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P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)

- Belgium’s potato imports are projected to reach ~41 LMT in MY26P.** Imports are expected to remain selective due to elevated domestic and EU stocks. Inflows is likely to cover processing specific gaps, as old crop availability extends into early summer in Belgium.
- Uzbekistan has agreed to import surplus potatoes from Pakistan¹** to cover short-term supply gaps before the local harvest. Imports are likely to be opportunistic and price-led, rather than structural.
- Italy’s imports are projected to grow year-over-year in MY26P,** driven by **greater consumer recognition** leading to **higher demand** for branded origin potatoes (**POD and PGI**) sourced predominantly from Germany, France and the Netherlands, commanding higher demand over older varieties.
- Afghanistan is likely to** continue diversifying potato imports away from Pakistan, with higher reliance on Iran and Central Asia, implying higher logistics costs and firmer import prices in early 2026 until regional new crop supplies enter the market.
- EU² (Netherlands, Germany) potato imports** are projected to **decline (~2%),** as **strong domestic inventories** and **surplus (~3.3 MMT in NW Europe from MY25)** **reduce import dependence,** with processors prioritizing local supply amid weak export demand.

Source: CY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable; CY26P projected figures are based on trade estimates & export trends. HS code 0701
PGI : Protected Geographical Indication, POD : Protected Designation of Origin; 1: [Freshplaza](#); 2. [EU imports](#)

Price Trends of Key Exporting Nations



P – Projected value

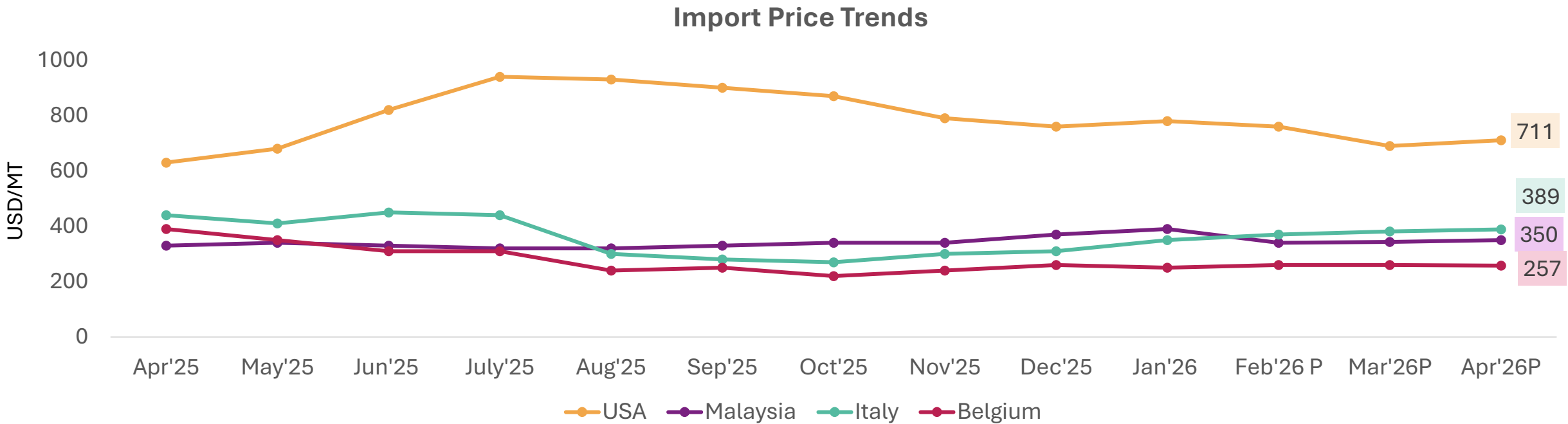
Price outlook for next quarter (MJJ)*					
Countries	Apr'26 P Price (USD/MT)	Apr'25 Price (USD/MT)	%age change	Price direction	Average projected price range for MJJ (USD/MT)
France	315	410	-23%	Bearish	250-290
Canada	670	627	7%	Sideways	660-720
China	398	550	-28%	Sideways	390-450
India	198	270	-27%	Sideways	170-220

- France's export prices remain under pressure in April 2026, averaging ~USD 310-320/MT, weighed down by contract shipments and steady processing demand. With the EU surplus persisting and production outpacing modest export growth, prices are expected to decline further between May and July.
- Canadian export prices have eased from early 2026 highs to ~USD 670-675/MT, as supply tightness gradually moderates and demand stabilises. The outlook for MY Q2 2026 remains largely sideways, with no significant price movement expected in either direction.
- China's export prices are on a recovery path after softening in early 2026, supported by strengthening demand from Southeast Asian markets. This demand-driven momentum is expected to sustain further price firming in the months ahead.
- Indian potato export prices have corrected modestly by 4-5%, from USD 190/MT to USD 198/MT between February and April 2026, driven by peak harvest arrivals flooding domestic supply and disrupting export momentum. Prices are expected to stabilise in the near term as seasonal supply pressure eases.

Source: Prices are from ITC Trade Map (till Feb 2026); Mar & Apr 2026 figures are seasonality and trend estimates, HS code 0701

Note Price forecasting is based on the fundamental analysis. MJJ stands for May, June & July 2026.

Price Trends of Key Importing Nations



P – Projected value

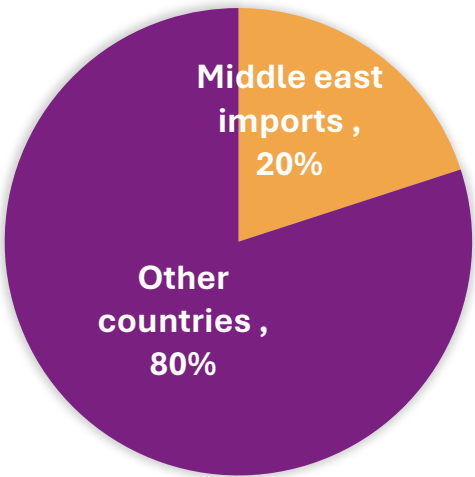
- **U.S. potato** import prices are projected to **rise moderately** in **Apr'26** to **~USD 700-715/MT**, as **drought-driven domestic supply** uncertainty increases **Canadian import reliance**, though Canada's record inventory is likely to limit sharp escalation.
- **Malaysia**, importing mainly from **China, Pakistan, and India**, faces steady **price rises** driven by **intra-Asia demand** and **limited Pakistani exports** due to **border closures** — peaking in Oct-Nov'25 before moderating from Dec'25-Jan'26 highs — sustaining a modest but stable price trajectory into Apr'26.
- **Italy's** import prices are slated to **rebound gradually** after a mid-year decline in MY25, expected to reach ~USD 350-400/MT by Apr'26P, indicating tighter supply conditions, and anticipated to stay firm in the upcoming quarters.
- **Belgium's oversupply** (~800,000 MT) and **the EU-4 surplus** (3.3 MMT) are anticipated to keep **import prices** suppressed at **~USD 250–260/MT** in **April 2026**. Weak export demand, Asian competition, and a weaker dollar limit any meaningful price recovery into April.

Source: Prices are from ITC Trade Map (till Feb 2026); Mar and Apr 2026 figures are seasonality trend estimates and secondary research, HS code 0701

1. [Canada's inventory pattern](#)

Domestic Supply Surge Weighs on Potato Prices as Export Influence Remains Limited

India's potato exports to Middle East markets



5-year average share (CY2021-2025)

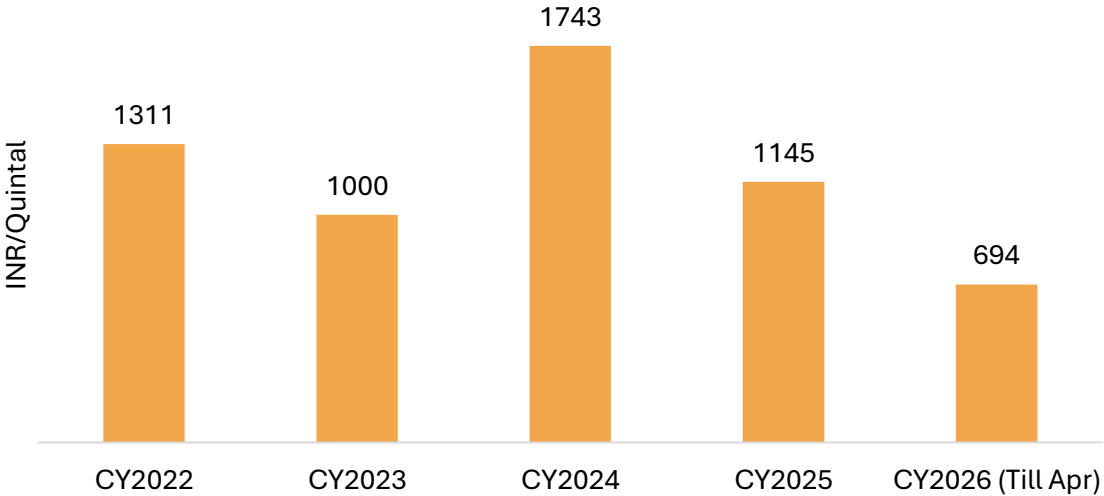
Source: DGFT

Export Exposure to Middle East

- Around 20% of India's potato exports are shipped to the Middle East, while ~80% go to markets such as Nepal, Sri Lanka, and Southeast Asia, indicating diversified export destination mix.
- Exports account for only ~1% of India's total potato production, with shipments to the Middle East estimated at ~1 lakh MT, limiting the impact of export disruptions on domestic supply.
- Logistics costs have surged, with 40-foot container freight rising from ~\$800 to over \$3,500¹, reducing short-term export competitiveness.

1. Trade source

Domestic prices



Source: Agmark net

- Domestic prices have dropped significantly, from ₹1,153/quintal in CY2025 (1st week of May) to ~₹694/quintal by 5th May 2026, reflecting a nearly 40% year-on-year decline in April-May, mainly due to peak harvest arrivals and increased domestic supply.
- Demand-side pressures intensified as temporary LPG shortages in the HoReCa segment slowed institutional consumption, while commercial gas prices surged by Rs 983 to ~Rs 3,000, moderating demand and likely stabilizing prices this season before firming up in upcoming quarters.
- Prices are expected to remain firm in the near term due to arrivals from the cold storage, with recovery likely from May onwards.

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.

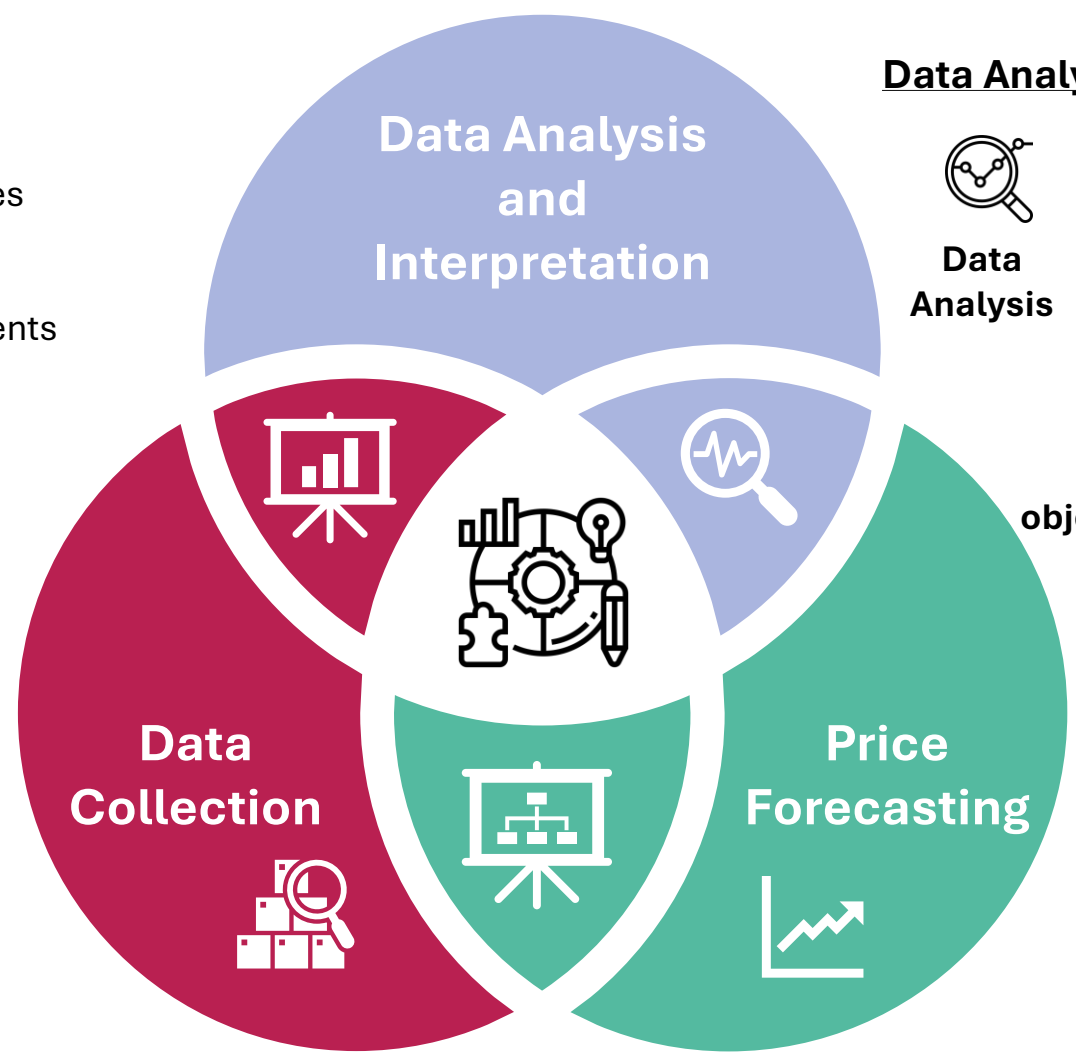
Data Collection

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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 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 policy assessments.