Crisil
Intelligence

एपीडा
APEDA

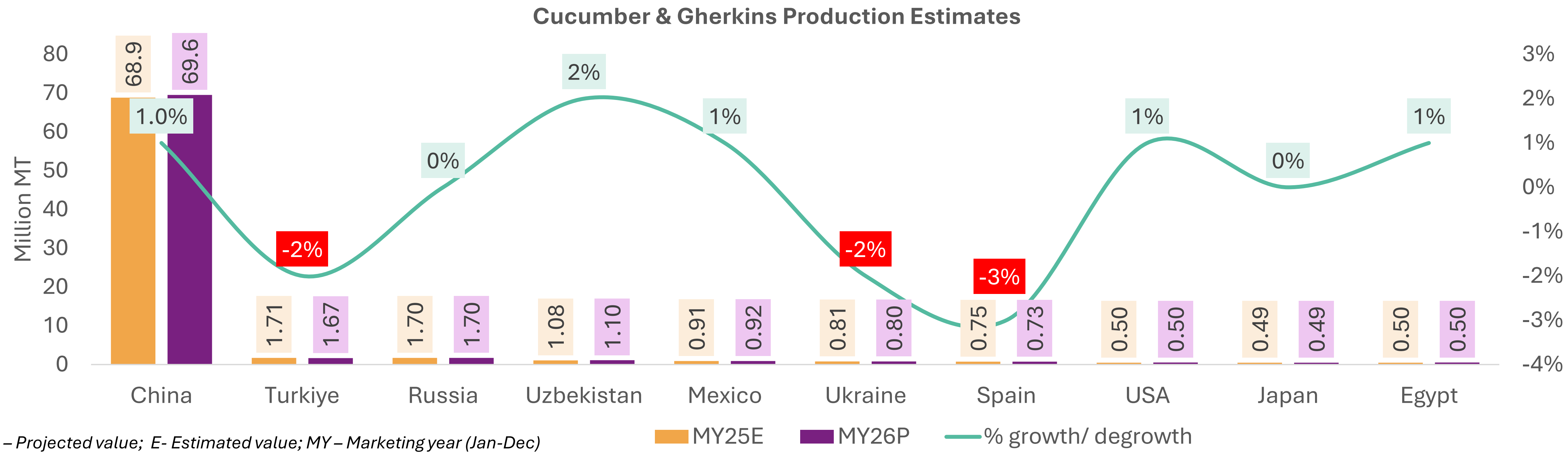
Monthly Dashboard - Cucumber & Gherkins

May 2026

HS code: 071140 & 200110

Production Trends

Production Estimate of Major Producing Countries



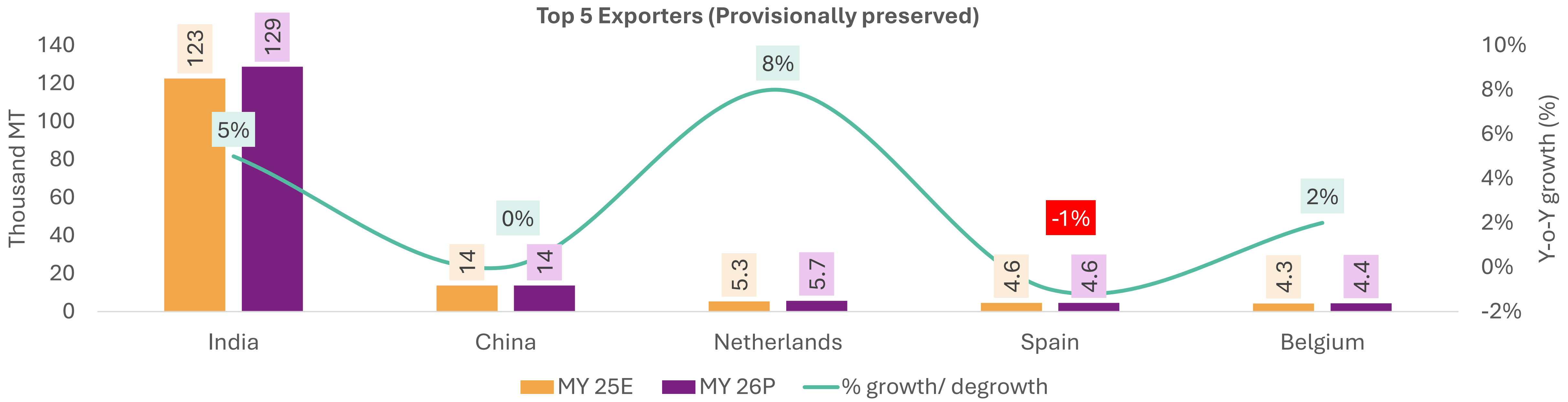
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The top ten countries account **for ~90% of global cucumber and gherkin production,** with China alone contributing ~80%.
- Global output is expected **at ~85–90 million metric tonnes in MY2026P**, growing ~1-2%.
- China's production remains dominant, supported by expanding greenhouse cultivation, which improves yield stability and reduces seasonality.
- **Türkiye's production is expected to decline**, as drought-driven water scarcity and irrigation constraints continue to impact yields.
- Other producers (e.g., Uzbekistan, the USA, and Egypt) are expected to see modest growth, supported by stable demand and gradual yield improvements.

Note: FAOSTAT; MY25 production 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;

Export Trends and Price Outlook

Major Exporters of Cucumber and Gherkins



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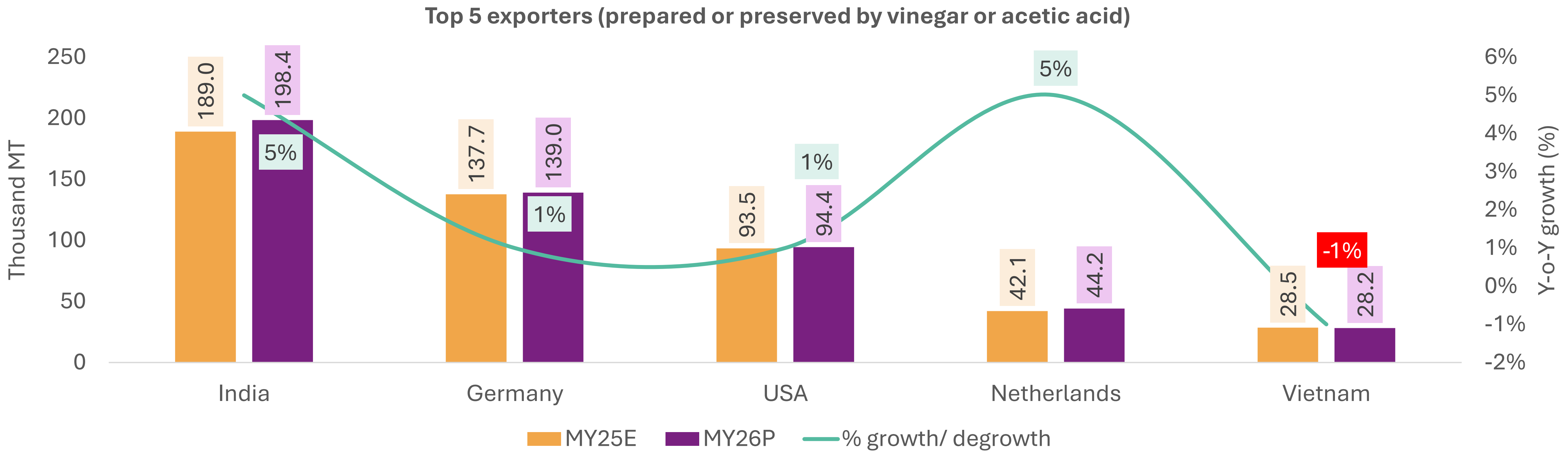
- The top five exporters account for ~90% of global cucumber and gherkin exports, with India leading at ~73% share, and exports expected to grow ~5% in MY2026P.
- **Exports from the Netherlands**[1] are projected to grow by ~7-8% in MY26P, driven by advanced greenhouse cultivation ensuring consistent, 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 cucumber exports are expected to decline in MY26P** due to yield pressures from Almería thrips infestation and adverse winter weather (December 2025–January 2026). Imports from Turkey are also likely to face pressure due to irrigation challenges.
- **Belgium's exports** are expected to see a **rise** of **~2%** in **MY26P** with volumes anticipated to rise from **4,300** to **4,400 MT**, driven by its **surge** as the **fastest-growing EU cucumber exporter** (+27.6% in MY25) 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



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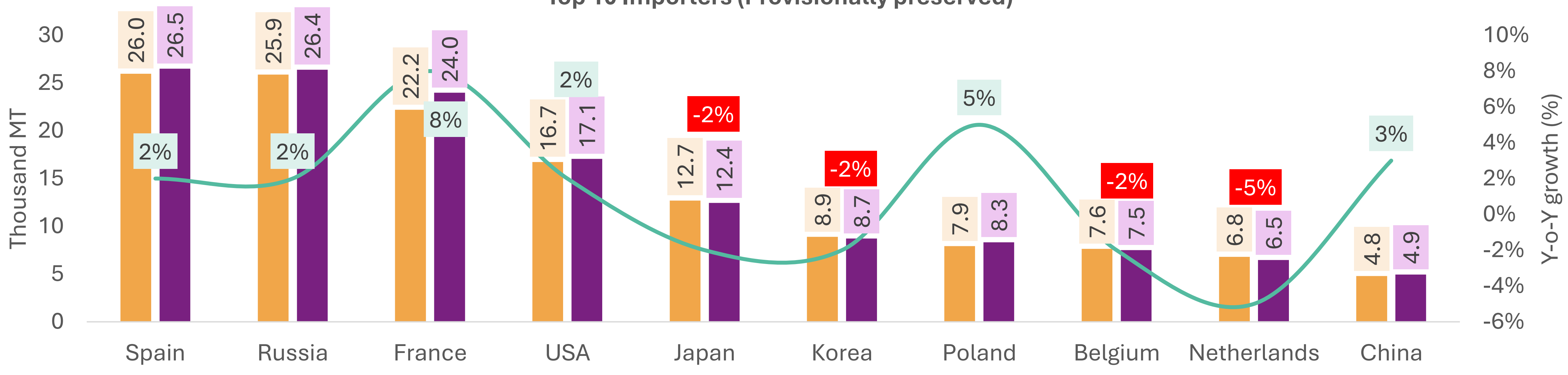
- **Global exports of vinegar-preserved cucumbers and gherkins are expected to grow by ~4–6%** in MY2026P, led by India, the Netherlands, and Germany.
- **A drought-driven supply gap in Türkiye** is expected to sustain strong European Union import demand (~3–4% annually), creating opportunities for key exporters as India.
- **India's**[1] exports are projected to grow by ~5% to ~198,000 metric tonnes, supported by expanding contract farming in Karnataka, Telangana, and Andhra Pradesh, along with strong European Union demand and increased processing capacity.

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

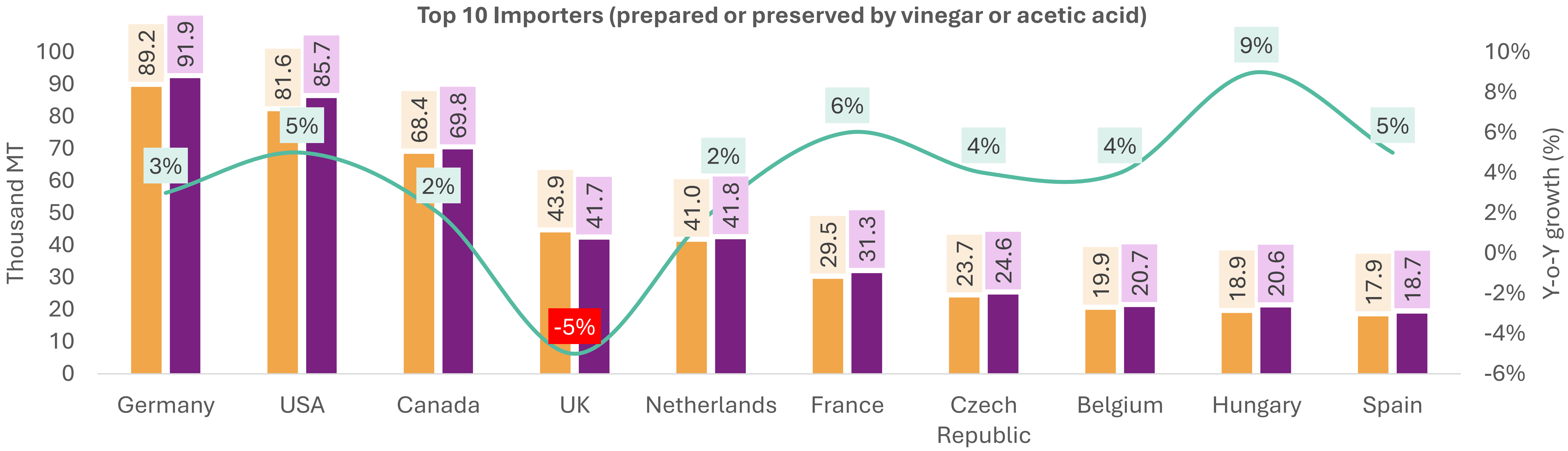


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries shown account for ~75% of global imports of preserved cucumbers and gherkins, with overall imports expected to grow ~1–2% in MY2026P, led by Spain, Russia, France, Poland, and China.
- **Poland's[1]** imports are expected to increase by ~5%, driven by strong demand from the processing industry and tight domestic supply.
- **Japan's[2]** imports are projected to decline by ~1–2%, as rising domestic production reduces reliance on imports.
- **Imports are expected to be robust for the US**. In MY25, imports grew by 65% during Q1–Q3 compared to the same period in MY24, and in MY26P, US imports are projected to grow further, supported by strong domestic demand and the recent easing of tariffs on India.
- **Korea's[3]** cucumber and gherkin imports are **expected to decline** as expansion of smart greenhouses boosts domestic supply. Output has risen by 33%, with over 60% farm adoption of IoT-enabled systems 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

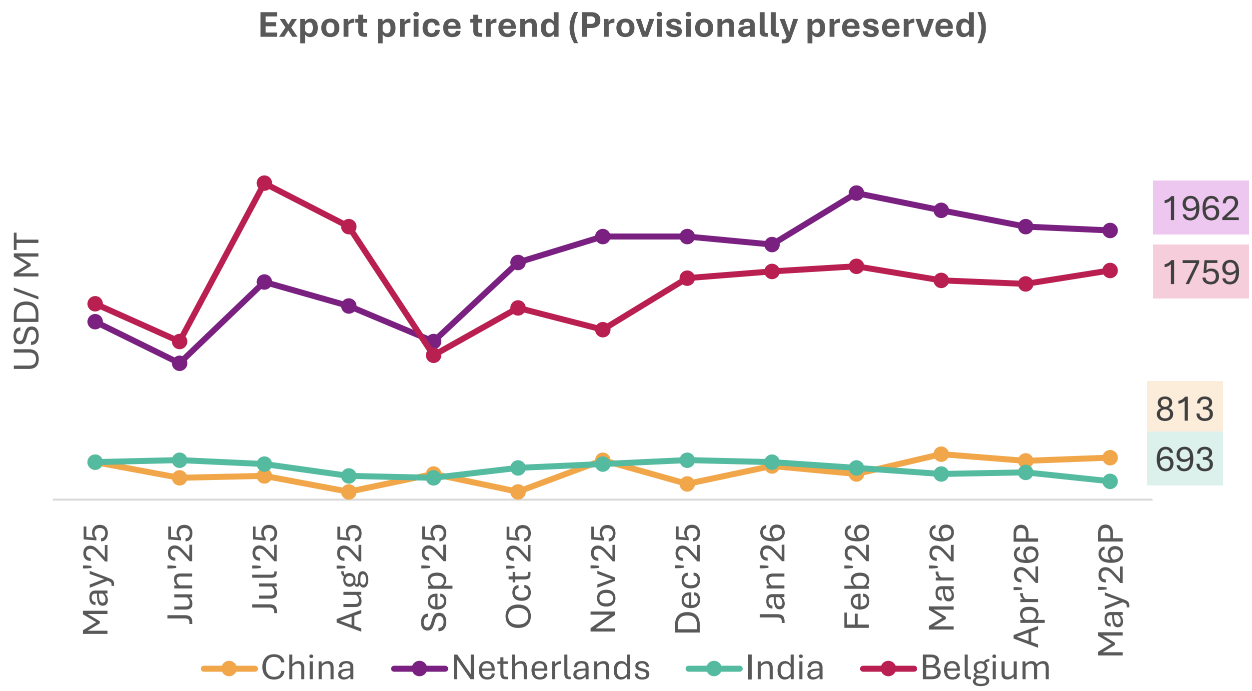


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries shown account for ~**61% of global imports** of cucumbers & gherkins preserved in vinegar.
- Global import volumes are **expected to rise by ~3-4% in MY26P**; EU makes up 55–60% of global import value for RTE products.
- **US imports** are projected to **rise** by **~5%** 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's[1] imports** are expected to **rise by ~1-2%** as domestic supply stagnates, with snacking cucumber (long and mini) demand up ~**13–14% YoY** and cocktail cucumber demand up **~25% YoY in 2025**.

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



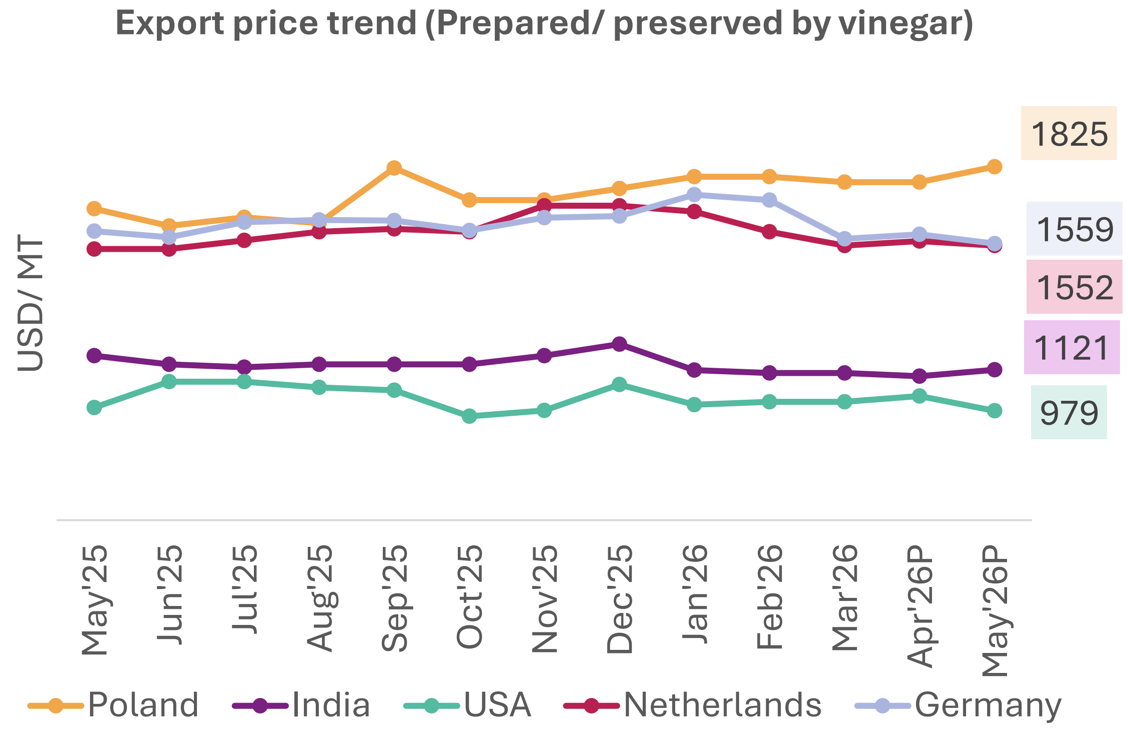
	Price outlook for next quarter (JJA)*				
Countries	May'26 P Price (USD/MT)	May'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JJA (USD/MT)
China	813	790	3%	Bearish	730-790
Netherlands	1962	1500	31%	Bearish	1740-1800
India	693	790	-12%	Bullish	720-780
Belgium	1759	1590	11%	Sideways	1745-1805

- **Global export prices of cucumbers and gherkins in early 2026 show a divergent trend**, with European markets (particularly Belgium) witnessing increased prices in May 2026 year-on-year, due to tight greenhouse supply and elevated energy costs, while other origins remain relatively stable.
- **China's prices are expected to remain bearish in the upcoming quarter**, supported by abundant supply-demand dynamics and stable regional exports, with prices likely to hover around **~USD 730-790/MT**.
- **Netherlands** prices **rose ~31% YoY (May'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 in the coming quarter.**

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

Note Price forecasting is based on the fundamental analysis. JJA stands for June, July, and August 2026.

Export Prices Forecast – Fundamental Analysis



	Price outlook for next quarter (JJA)*				
Countries	**May'26 P Price (USD/MT)**	**May'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for JJA (USD/MT)**
Poland	1825	1680	9%	Sideways	1810-1870
India	1121	1170	-4%	Sideways	1095-1155
USA	979	990	-1%	Sideways	965-1025
Netherlands	1552	1540	1%	Bearish	1460-1520
Germany	1559	1602	-3%	Sideways	1510-1570

- 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's prices are expected to remain sideways in upcoming quarter at ~ USD 1,810-1,870/MT. For the Netherlands, prices are likely to be bearish at ~USD 1,460–1,520/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 1,095 -1,155/MT** during **Jun to Aug'26**.

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

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Thank You

Methodology for price forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuraMY and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

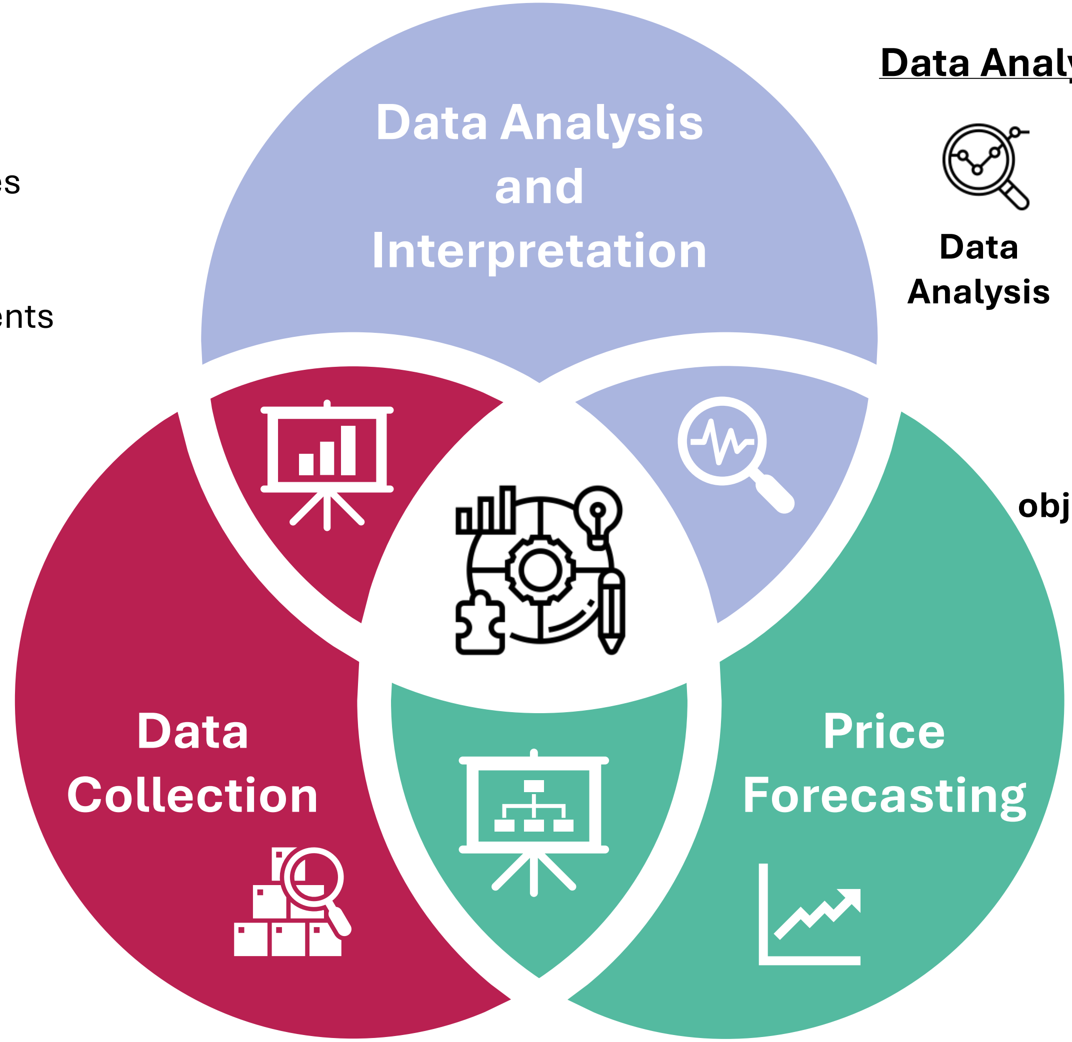
Data Collection

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.