

Monthly Dashboard Potato

HS code: 0701

May 2026



Acreage and Production trends



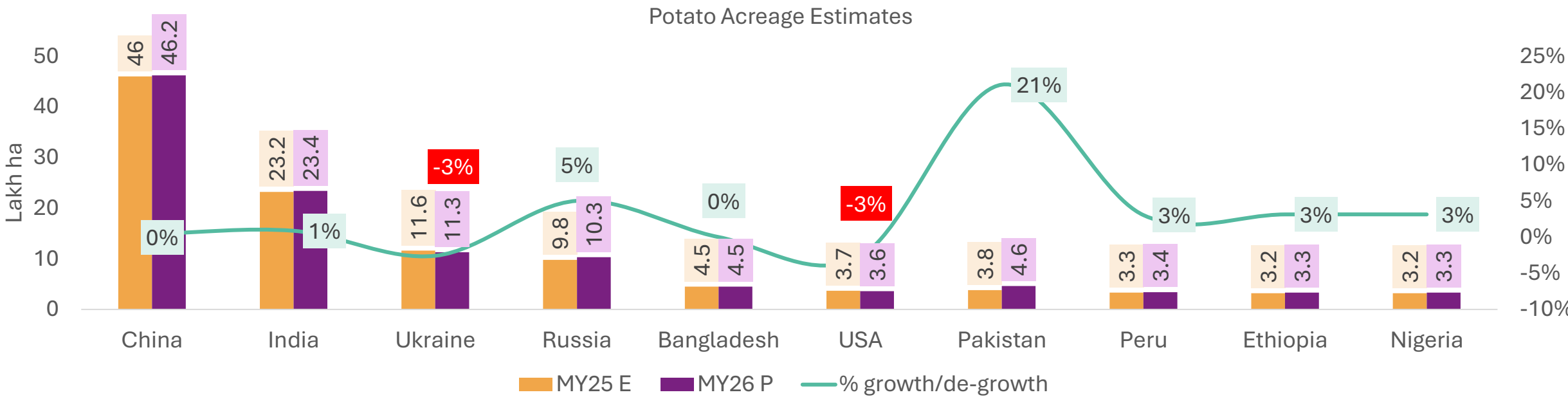
Potato Crop Calendar of Major Producing Countries

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 and India have multiple harvests—India's Rabi crop (February–April) and South (Winter) crop (January–March)—ensuring near year-round supply from the top producers.
- In European countries such as 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



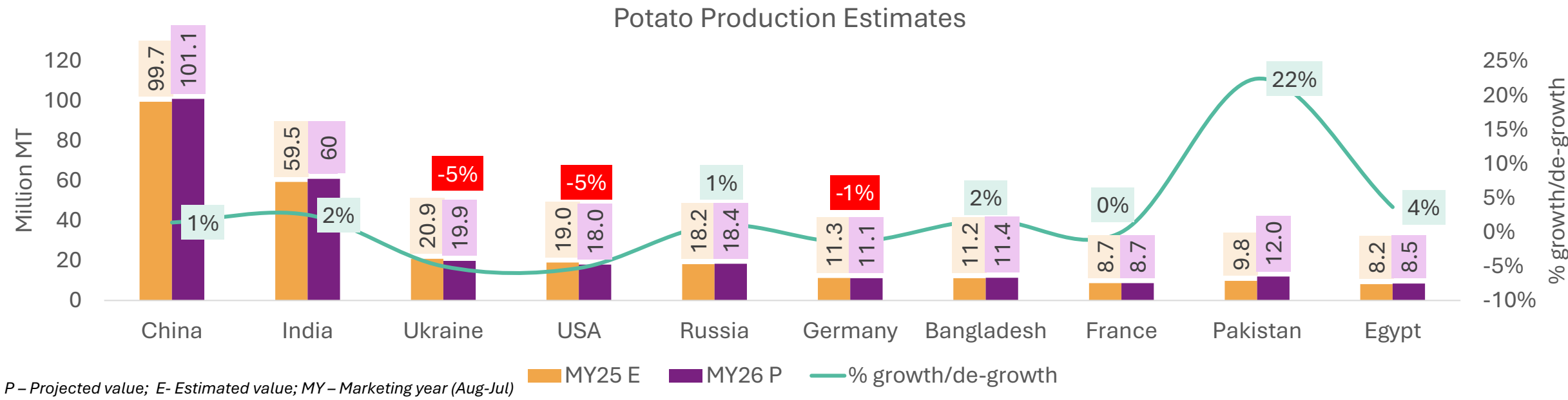
P – Projected value; E – Estimated value; MY – Marketing year (Aug-Jul)

- The countries highlighted in the chart **account for nearly 66% of the world’s potato acreage**, with global potato acreage estimated to have marginally improved by ~1% on year in MY26P.
- **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 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 and weakened demand.
- **Pakistan's potato acreage²** is estimated to **increase** by ~21% to 4.62 lakh hectares in MY26P, supported by sustained cultivation expansion—up 160% since 2015–16—driven by strong domestic demand and government initiatives aimed at improving export access and developing 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



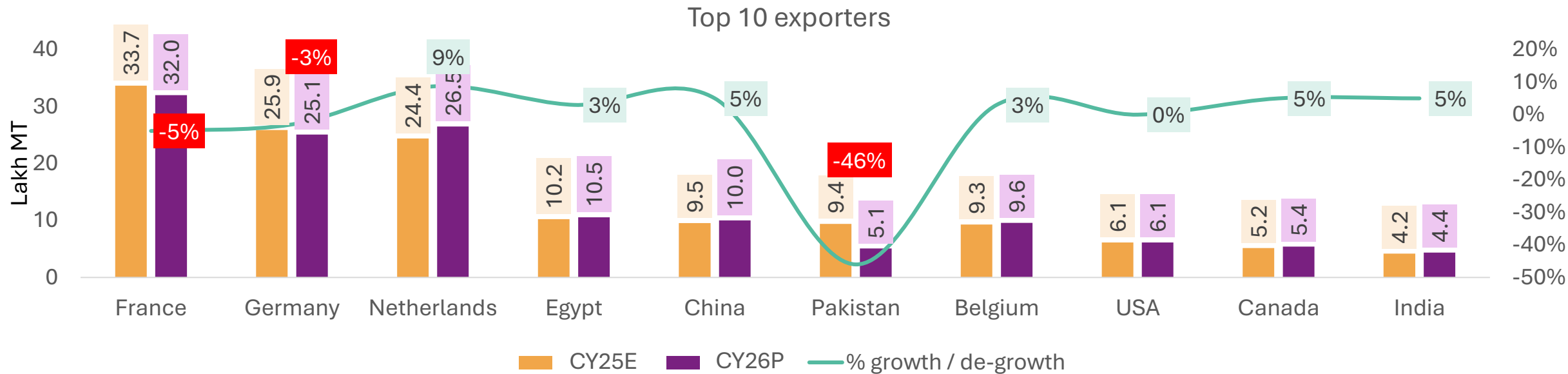
- The countries highlighted in the chart account for **nearly 67% of global potato production**. Global output is estimated to have improved marginally by ~1–2% year-on-year in MY26P.
- **China’s MY26P production is forecast at 101.1 MMT**, maintaining its position as the world’s leading producer. This 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 ~60 MMT (+1-2% YoY), marking a record level and strengthening its position as the second-largest producer globally.
- **Germany’s¹ potato production is projected to reduce (~1–2%)**, led by **decline in planted acreage by ~7%** and increasing yields across key regions such as Lower Saxony and North Rhine-Westphalia, contributing to the broader Northwest European surplus.
- **US potato production² is projected to decline ~5% in MY26P**, as **drought conditions** spanning **52%** of key growing states — with **Idaho, Colorado and Oregon** 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



% share of global exports	20%	15%	15%	6%	6%	6%	6%	4%	3%	2%
---------------------------	-----	-----	-----	----	----	----	----	----	----	----

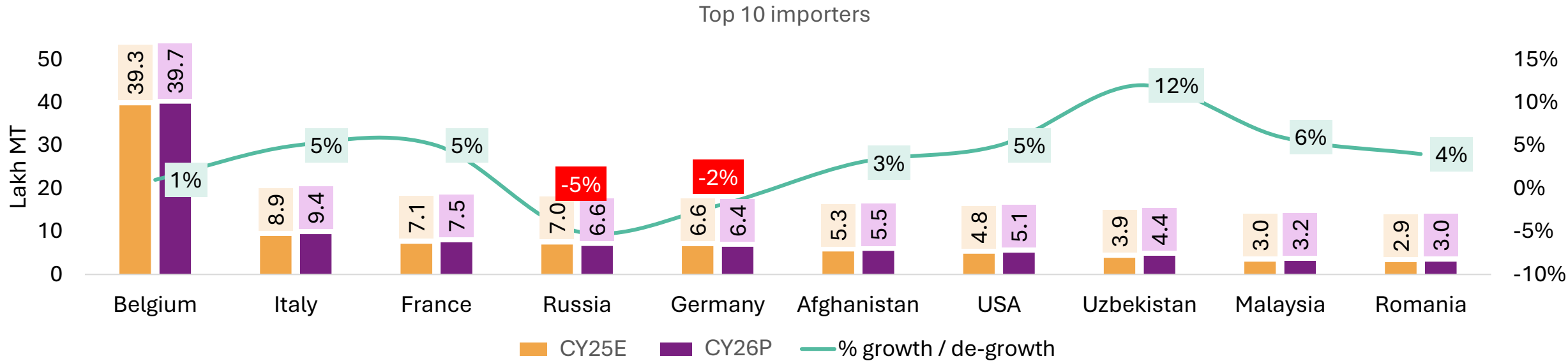
P – Projected value; E- Estimated value;

- The countries in the chart account for about 82% of global potato exports, with exports for CY26P expected to decline by 2–3% year-on-year.
- In CY26P, Egypt’s potato exports are projected to grow by around 3%. This expansion is driven by Egypt’s early harvest window, its proximity to key importing regions, and its ability to deliver consistent quality during seasonal supply gaps in destination markets.
- France’s potato exports¹ are expected to fall by ~5%, respectively, as reduced planted acreage tightens exportable supplies, despite near to stable production. Weather-related yield volatility, and strict quality standards further limit export volumes.
- Canada’s² exports to increase by ~5% in CY26P, supported by strong contract-based supply stability (with 90–95% tied to U.S. processors) and continued infrastructure investments, including premium equipment partnerships in key Ontario growing regions, reinforcing dependable export capacity.
- Pakistan’s³ potato output is estimated at ~12 MMT with a 3–4 MMT exportable surplus, but exports are expected to drop ~45–50% in CY26P due to the Afghanistan border closure (~43% share), with limited offset from reopening of the Russia market (~0.3%).

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 & France’s Potato exports](#) ; 2. [Canada’s exports](#); 3. [Pakistan exports](#)

Major Importers of Potato



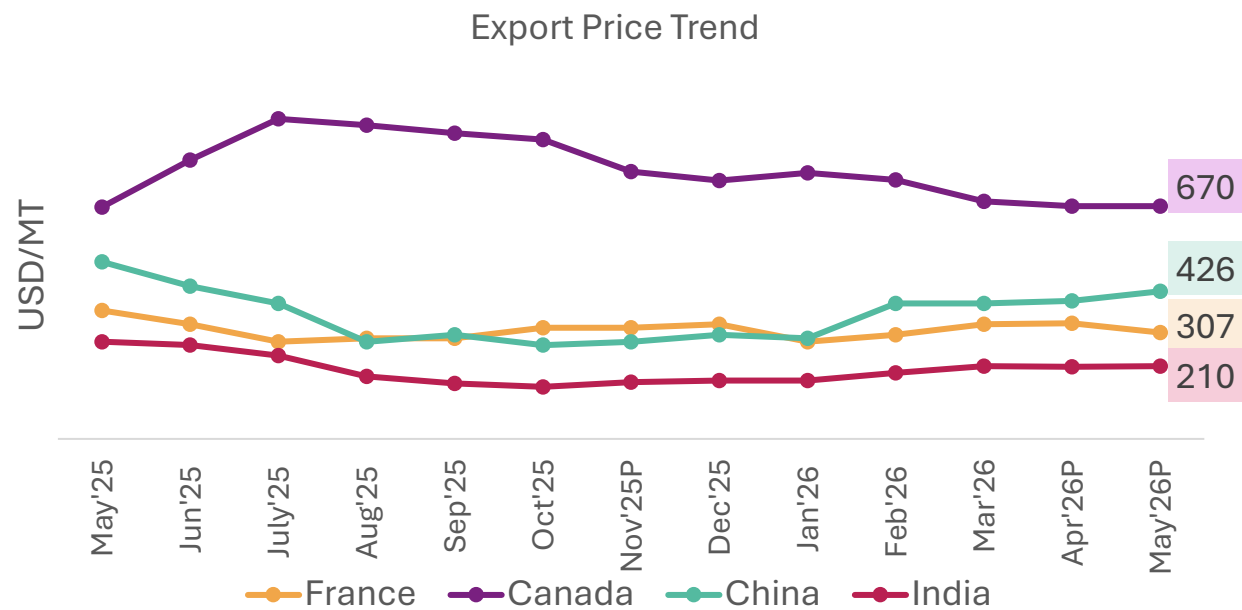
% share of global imports	26%	6%	5%	5%	4%	4%	3%	3%	2%	2%
---------------------------	-----	----	----	----	----	----	----	----	----	----

P – Projected value; E- Estimated value;

- Belgium’s potato imports are projected to reach ~40 LMT in CY26P.** Imports are expected to remain selective due to elevated domestic and EU stocks. Inflows are 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 5% YoY in CY26P**, 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.
- Russia’s²** potato imports are expected to **decline** by ~5% in **CY26P to ~6.6 LMT**, as significant 2025 domestic harvest of **18.2 MMT** and **97.9% self sufficiency** sharply **reduce foreign import dependency**.
- Germany³** potato imports are expected to decline by ~2%, as strong domestic inventories and a ~3.3 MMT surplus in Northwest Europe (from CY25) reduce import needs, with processors favoring 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. [Russia’s imports](#) 3. [EU imports](#)

Price Trends of Key Exporting Nations



P – Projected value

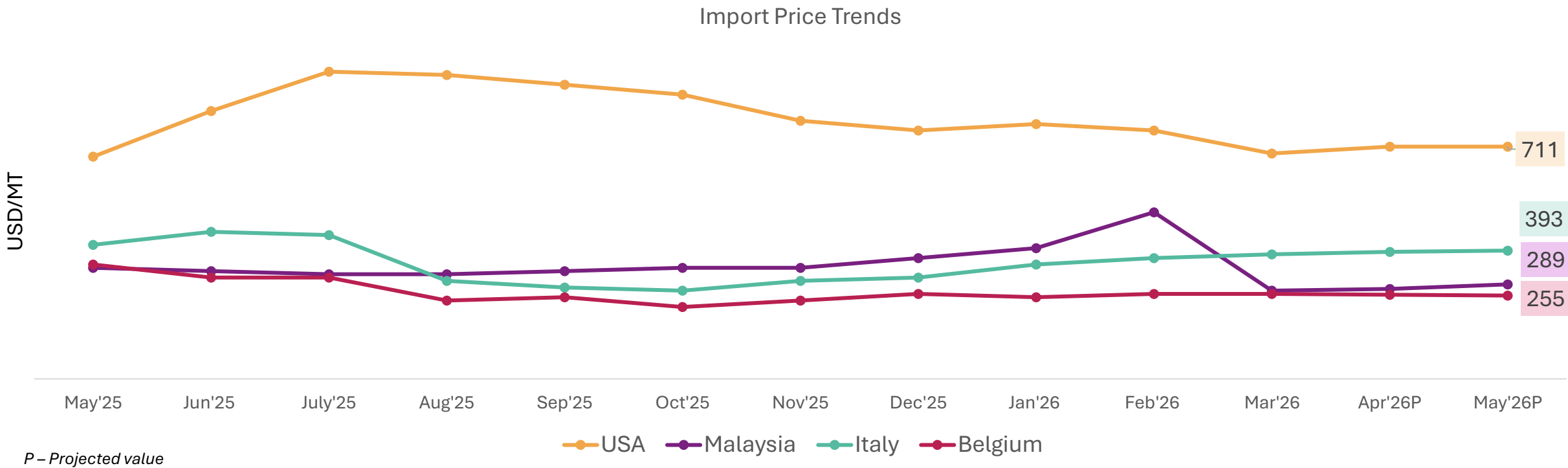
	Price outlook for next quarter (JJA)*				
Countries	May'26 P Price (USD/MT)	May'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JJA (USD/MT)
France	307	370	-17%	Bearish	250-300
Canada	670	668	0%	Bullish	680-740
China	426	510	-16%	Sideways	390-450
India	210	280	-25%	Sideways	170-230

- **France's** export prices **remain under pressure** in **May'26P**, averaging ~**USD 300-310/MT**. With the **EU surplus** persisting and **production outpacing** modest export growth, prices are expected to **decline further** between **June and August**.
- **Canadian** export prices have **eased** from **early 2026 highs** to ~**USD 670-675/MT**, as supply tightness gradually moderates and **demand stabilizes**. The outlook for **coming quarters** remains **largely bullish**, as stored stocks from Alberta and Manitoba deplete ahead of the Sept-Oct main harvest.
- **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 **keep prices rangebound** in the months ahead.
- **Indian** potato export prices have increased modestly by **10-11%**, from **USD 190/MT** to **USD 210/MT** between **February** and **May 2026**. Prices are expected to **remain sideways** in the near term as **seasonal supply pressure eases**.

Source: 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 0701

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

Price Trends of Key Importing Nations



- **U.S. potato** import prices are projected to **rise moderately** in **May’26P** to **~USD 710-715/MT**, as **drought-driven domestic supply** uncertainty increases **Canadian import reliance**, though Canada's record inventory is likely to limit sharp escalation.
- **Malaysia’s potato import prices fell sharply in Mar’26** due to an Indian post-rabi supply glut, weakened HoReCa demand amid West Asia tensions, and freight disruptions via the Strait of Hormuz; prices are expected to stabilize and recover from May’26P as Indian stocks tighten.
- **Italy’s potato import prices are expected to gradually recover** from a mid-MY25 decline, reaching ~USD 380–400/MT by May’26P, reflecting tightening supplies and likely to remain firm in the coming quarters.
- **Belgium’s oversupply** and the **EU surplus** (3.3 MMT) are estimated to have kept **import prices** suppressed at **~USD 250–260/MT** in **May’26P**. Weak export demand, competition from Asia, and a softer dollar are expected to constrain any significant price recovery beyond May’26.

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.

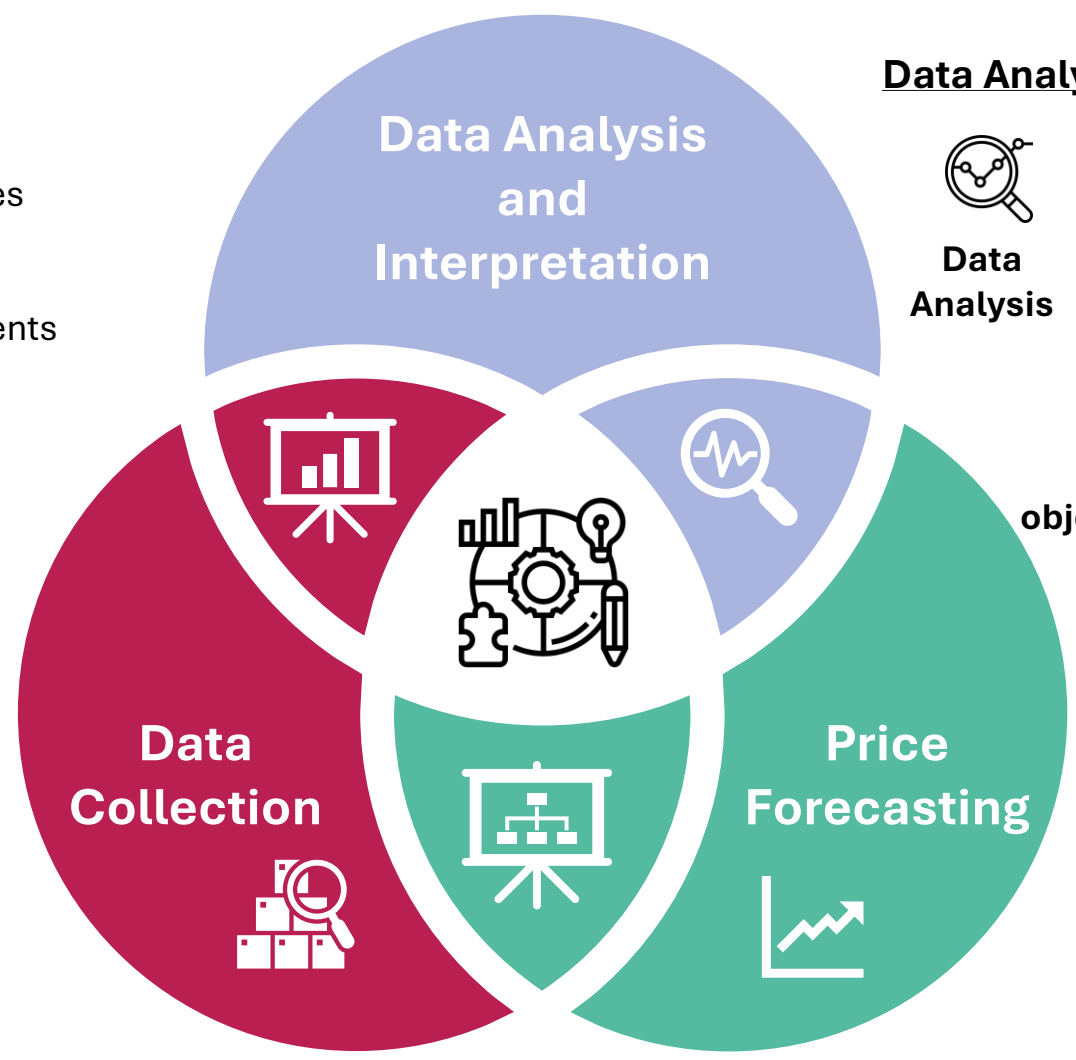
Data Collection

- 

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

- 

Policy 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
 - Policy impact analysis
 - Stakeholder consultations

- 

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.