Crisil Intelligence

एपीडा
APEDA

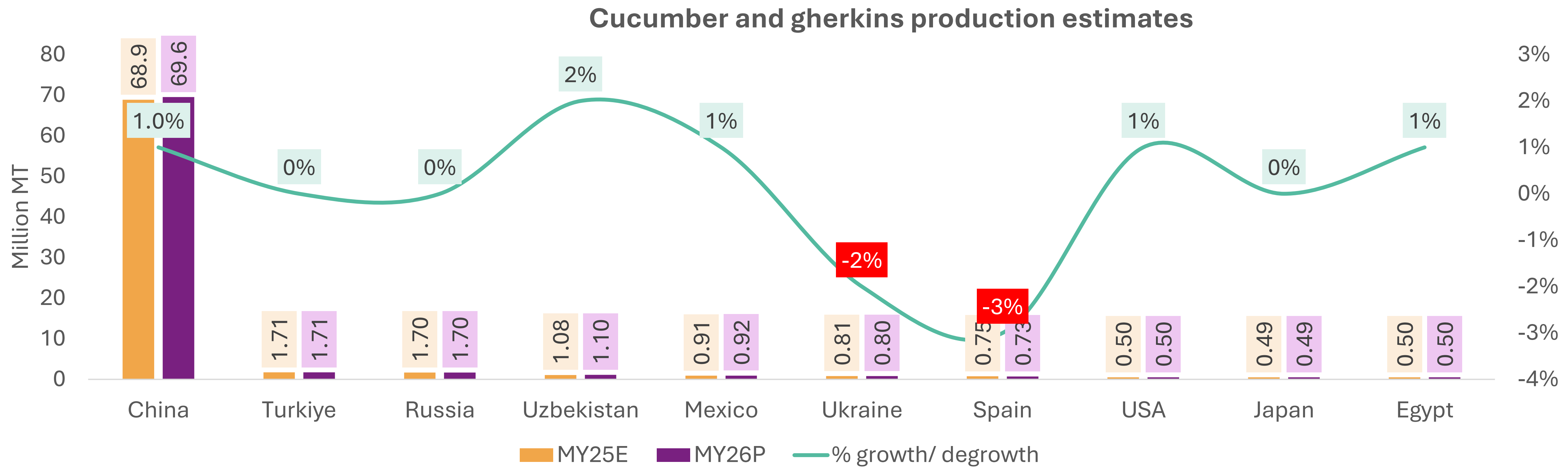
Monthly Dashboard - Cucumber & Gherkins

June 2026

HS code: 071140 & 200110

Production Trends

Production Estimate of Major Producing Countries



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

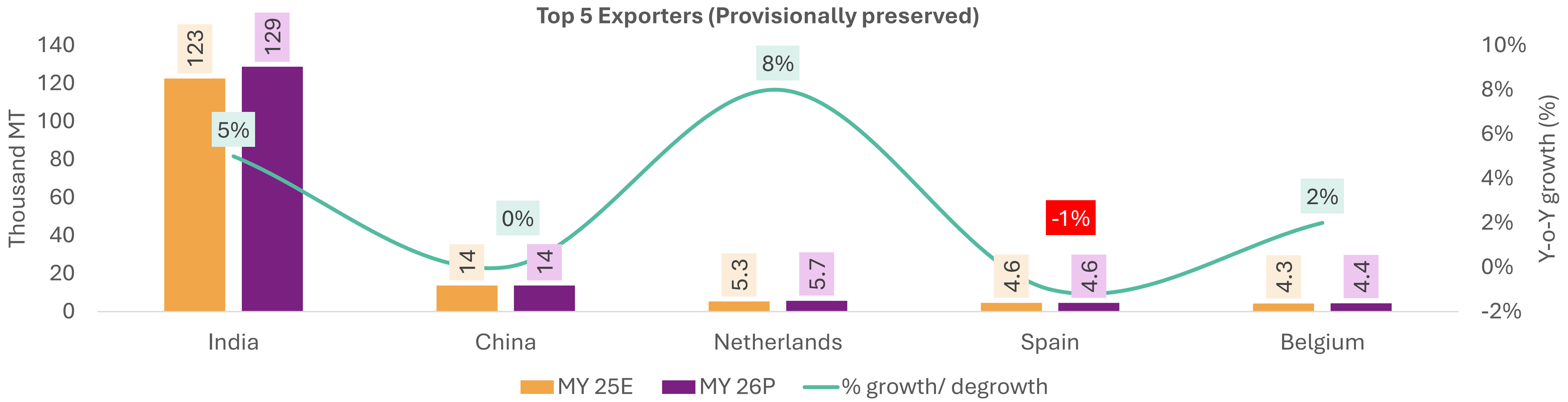
- The top ten countries account **for ~90% of global cucumber and gherkin production,** with China alone contributing ~80%.
- Global output is expected to reach **~75-80 million metric tonnes in MY26P**, growing ~0-1%.
- China's production remains dominant, supported by expanding greenhouse cultivation, which improves yield stability and reduces seasonality.
- **Turkey's**[1] cucumber and gherkin production is expected to remain **largely stable** in **MY26**, as greenhouse cultivation offsets the impact of ongoing drought and irrigation constraints in key growing regions like **Antalya**, **Mersin**, and **Adana**.
- 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: *Turkey's production estimates*;

Note: 1. Growth rates are calculated using unrounded production values

Export Trends and Price Outlook

Major Exporters of Cucumber and Gherkins



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

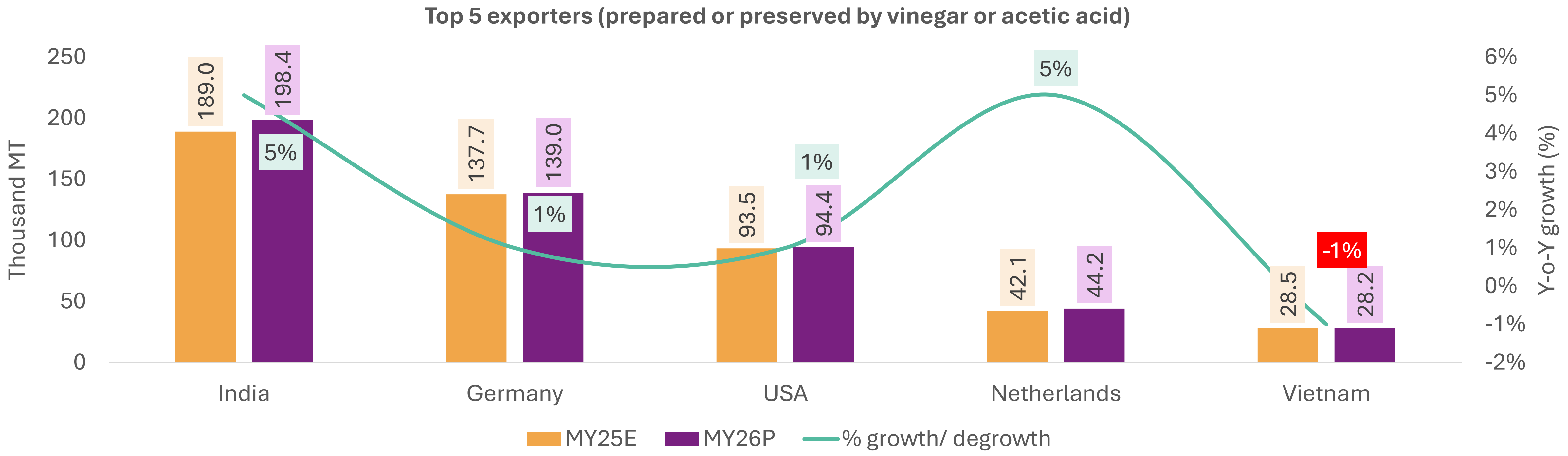
- The top five exporters account for ~90% of global cucumber and gherkin exports, with India leading at ~73% share, and exports expected to grow ~5% in MY26P.
- **India's**[1] gherkin exports hit a record **USD 307.6 million** in **MY2025-26**, with volumes up 8% YoY. **Increased demand** from **Germany**, **Russia**, **Canada**, and **the Netherlands** offset weaker US shipments, supporting a **positive export outlook.**
- **Spain**[2] **mainly imports bulk**, brine-preserved gherkins (HS 071140) from India and Turkey for value addition and re-export as vinegar-pickled gherkins (HS 200110), while **cucumber exports are projected to decline slightly (~1%)** in MY26P due to pest pressures in Murcia and Granada and constrained supply support from Turkey amid 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 **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. Indian Exports; 2. Spain's domestic production

Note: 1. Growth rates are calculated using unrounded actual export values

Major Exporters of Cucumber and Gherkins



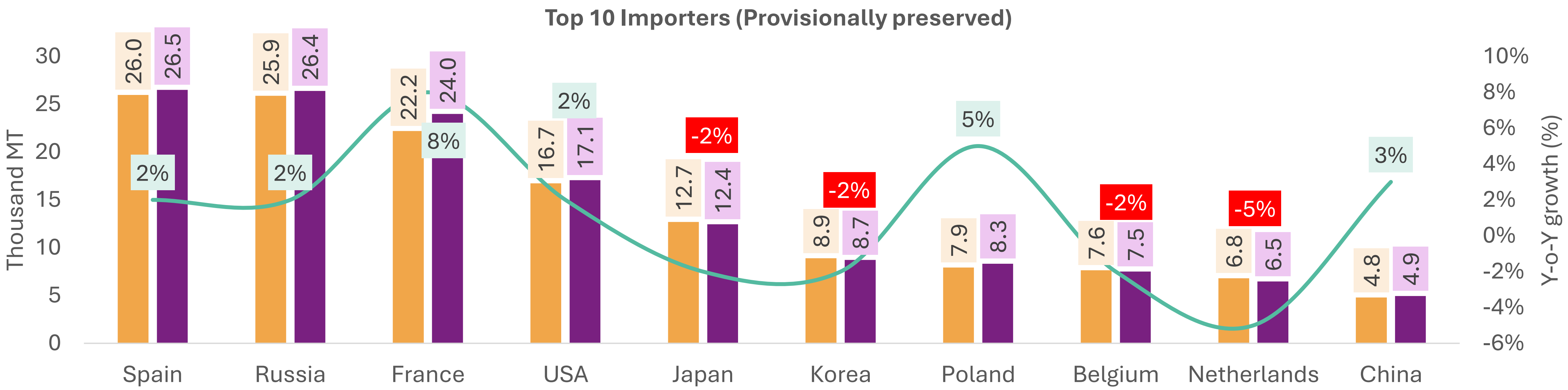
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **Global exports of vinegar-preserved cucumbers and gherkins are expected to grow by ~4–6%** in MY26P, led by India, the Netherlands, and Germany.
- Continued **EU import demand** (~3–4% annually) is expected to **support sourcing requirements**, creating **export opportunities** for key suppliers such 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

Note: 1. Growth rates are calculated using unrounded actual export values

Major Importers of Cucumber and Gherkins



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

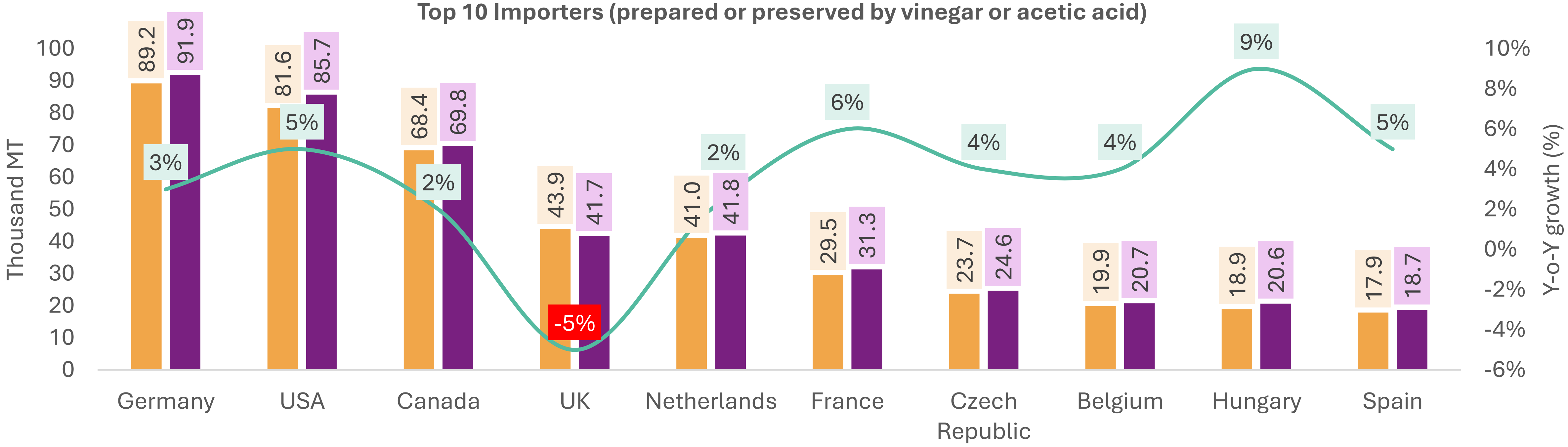
- The countries shown account for ~75% of global imports of preserved cucumbers and gherkins, with overall imports **expected to grow ~1–2% in MY26P**, led by Spain, Russia, France, USA, Poland, and China.
- **Poland's**[1] imports are **expected to increase by ~5**%, driven by strong demand from the processing industry and tight domestic supply.
- **US imports are expected to grow moderately on a high base.** 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.
- **Japan's**[2] imports are projected **to decline by ~1–2%,** as rising domestic production reduces reliance on imports.
- **Korea's**[3] cucumber and gherkin imports are expected **to decline** as smart greenhouse expansion boosts domestic production, with output up 33% and IoT adoption exceeding 60% of farms by early 2026.

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

Note: 1. Growth rates are calculated using unrounded actual import values

Major Importers of Cucumber and Gherkins



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

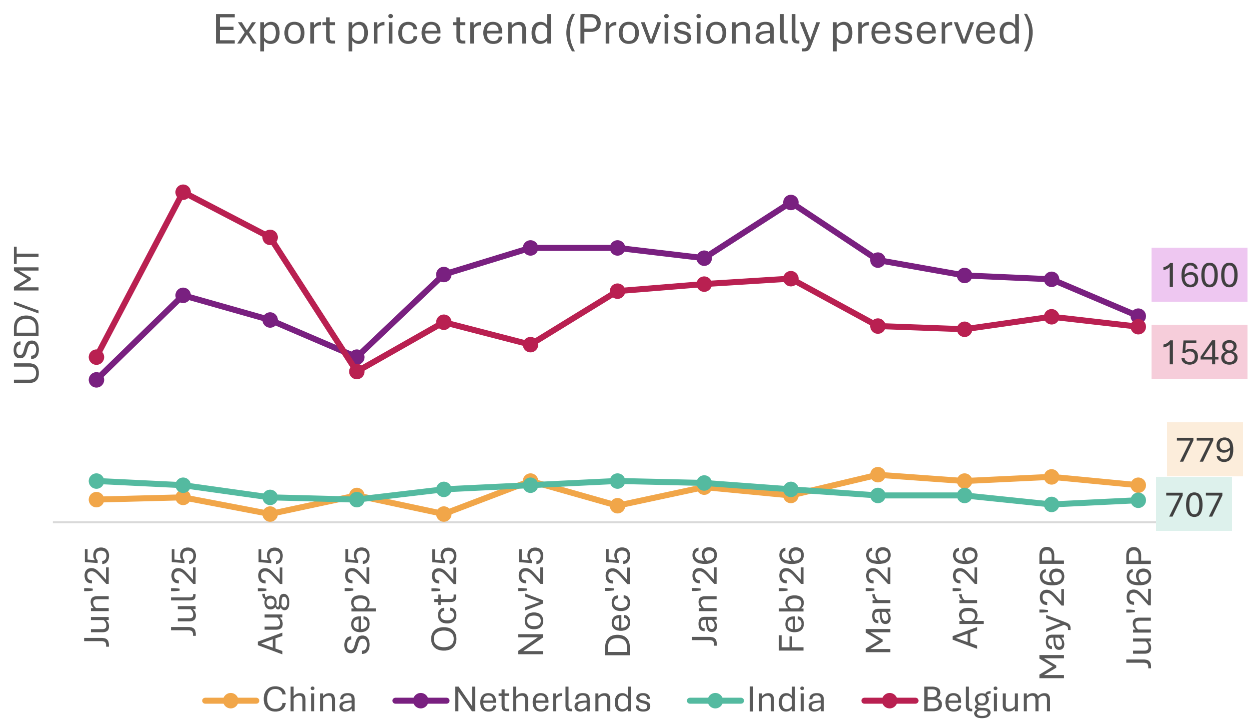
- The countries shown account for ~**61% of global imports** of cucumbers & gherkins preserved in vinegar.
- Global import volumes are **expected to rise by ~3-4% in MY26P**; EU makes up 55–60% of global import value for **RTE cucumber and gherkins products.**
- **US imports** are projected to **rise** 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 anticipated to remain firm **(1-2%)** in **MY26P**, supported by supply constraints and elevated logistics cost that have pushed the prices higher. Rising prices may encourage importers to secure additional volumes to meet market demand.

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

Note: 1. Growth rates are calculated using unrounded actual import values

Export Prices Forecast – Fundamental Analysis



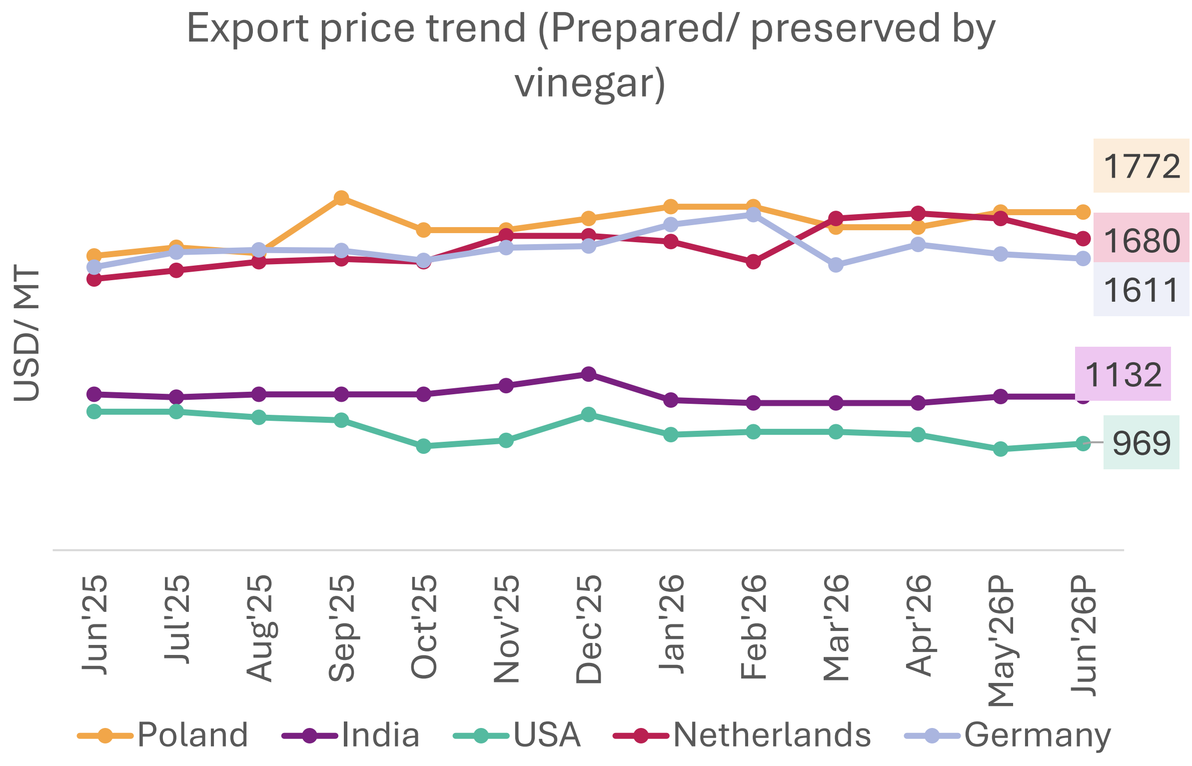
	Price outlook for next quarter (JAS)*				
Countries	June'26 P Price (USD/MT)	June'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JAS (USD/MT)
China	779	710	10%	Sideways	740-800
Netherlands	1600	1290	24%	Sideways	1595-1655
India	707	800	-12%	Bullish	718-778
Belgium	1548	1400	11%	Bullish	1584-1644

- **Global export prices of cucumbers and gherkins show a divergent trend**, with European markets (particularly Belgium and Netherlands) witnessing increased prices in June 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 sideways in the upcoming quarter**, supported by steady supply-demand dynamics and stable regional exports, with prices likely to hover around **~USD 740-800/MT**.
- **Netherlands** prices **rose ~24% YoY (June'26P)** due to **winter greenhouse supply constraints** and **elevated energy costs**; however, with **seasonal production recovery,** supply is expected to outpace demand**, keeping prices rangebound in the coming quarter.**

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

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

Export Prices Forecast – Fundamental Analysis



	Price outlook for next quarter (JAS)*				
Countries	**June'26 P Price (USD/MT)**	**June'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for JAS (USD/MT)**
Poland	1772	1620	9%	Sideways	1765-1825
India	1132	1140	-1%	Sideways	1100-1160
USA	969	1080	-10%	Sideways	933-993
Netherlands	1680	1540	9%	Sideways	1655-1715
Germany	1611	1581	2%	Sideways	1586-1646

- **The Netherlands**, **Germany**, and **Poland** continue to serve as key re-export and processing hubs in Europe, with value addition and steady intra-EU demand supporting premium pricing.
- **Poland's** prices are expected to remain **sideways** at **~USD 1,765–1,825/MT** during upcoming quarter, while **Netherlands** prices are likely to remain **rangebound** at **~USD 1,655–1,715/MT** amid improved supply availability, competitive EU exports, and moderating redistribution demand.
- **India's** exports continue to be supported by sustained demand from **the US** and **EU markets**. Strong processing capabilities and stable export demand are expected to keep prices largely **sideways** at **~USD 1,100–1,160/MT** during **Jul–Sep'26.**

Note: ITC Trade Map (up to Apr 2026); prices for May and June 2026 are estimated based on seasonal patterns, trade trends and trade estimates
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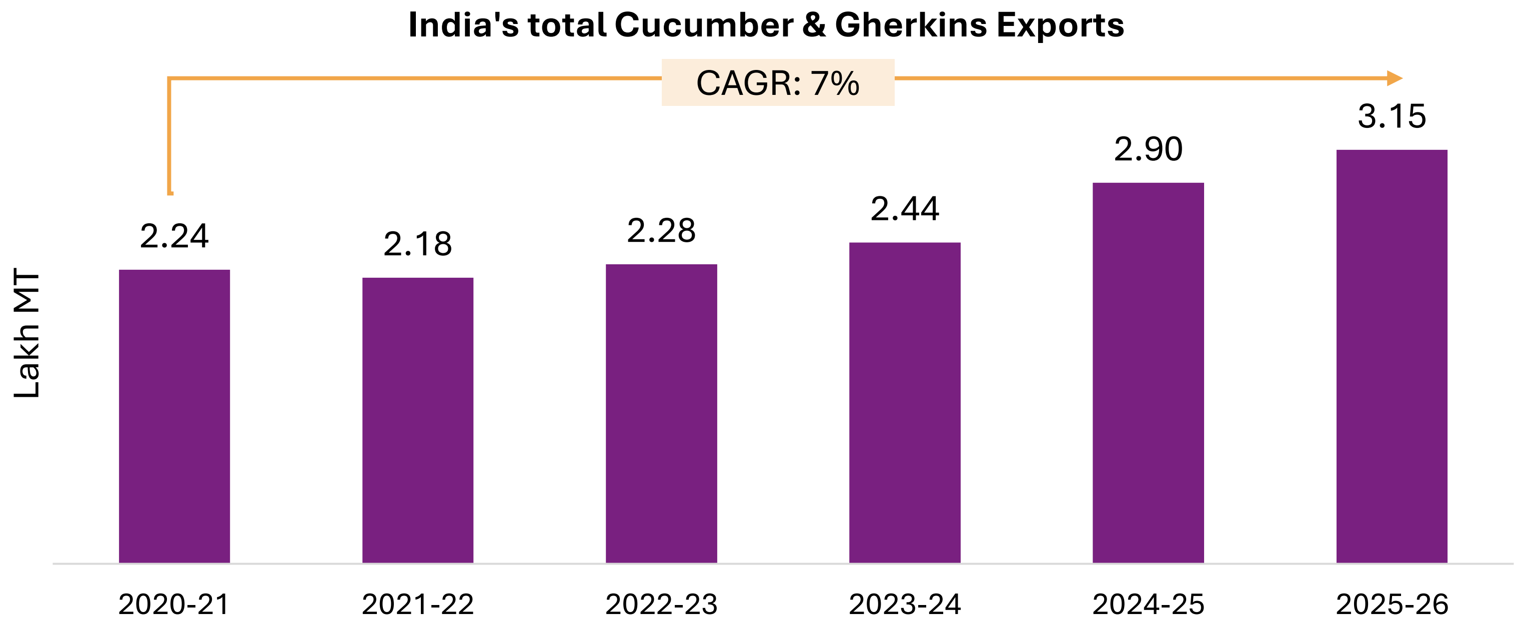
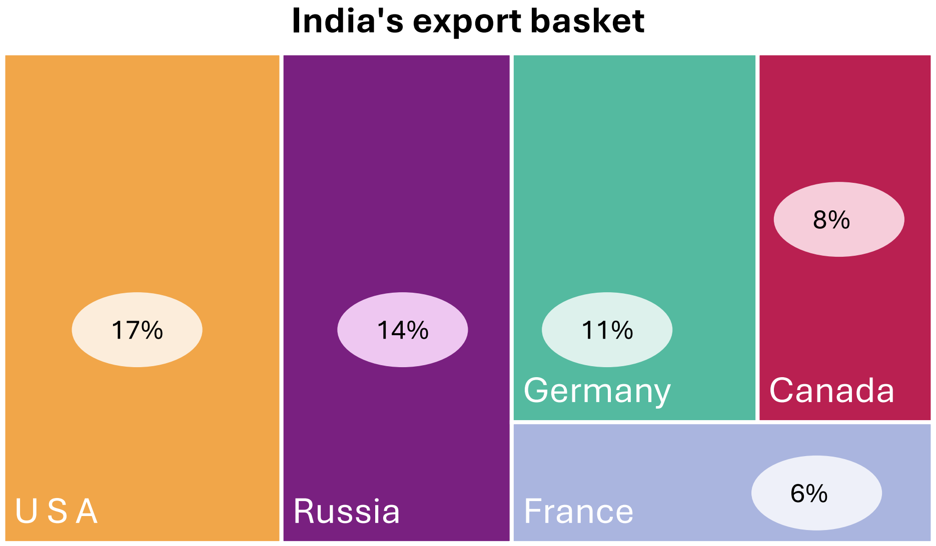
Note: Price forecasting is based on the fundamental analysis. JAS stands for July, August and September 2026.

India Achieved Record Gherkins Exports in FY 26 Despite US Tariff Challenges





- India's gherkin exports reached a record **~USD 307.6 million** in **FY26**, marginally surpassing ~**USD 306.7 million** in **FY25**. Export volume increased by **8% YoY** to **3.15 LMT** from **2.90 LMT**, reflecting sustained demand for Indian gherkins.
- **The US** remained the **largest destination**, but exports to the country **declined** due to **tariff-related issues**:
    - **Export value** fell **27% YoY** to **~USD 53.6 million**.
    - **Export volume** declined **23% YoY** to **0.52 LMT.**
- The **decline** in the **shipments** to **the US**, along with **weaker demand** from **Spain** and **France**, was more than offset by **increased purchases** from **Germany**, **Russia**, **Canada** and **the Netherlands**, highlighting the **sector's growing market diversification.**
- **India's gherkin** industry continues to benefit from a well-established **contract farming model**, with production and processing concentrated in **Karnataka**, **Tamil Nadu** and **Andhra Pradesh**, supporting a **stable export-oriented supply chain.**

Source: 1. India's Record High Gherkins Export

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.

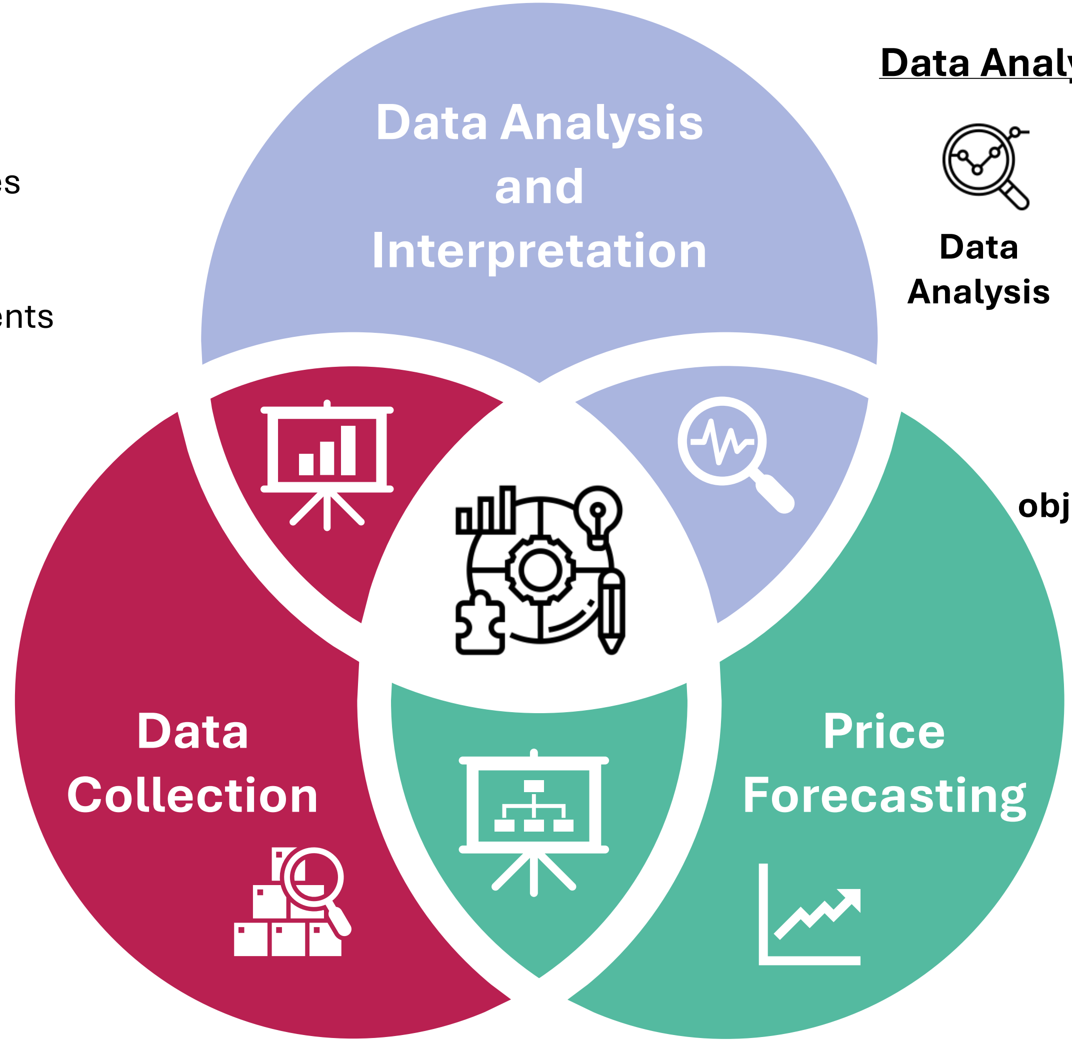
Data Collection

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.