

Monthly Dashboard Potato

HS code: 0701

June 2026



Acreage and Production trends



Potato Crop Calendar of Major Producing Countries

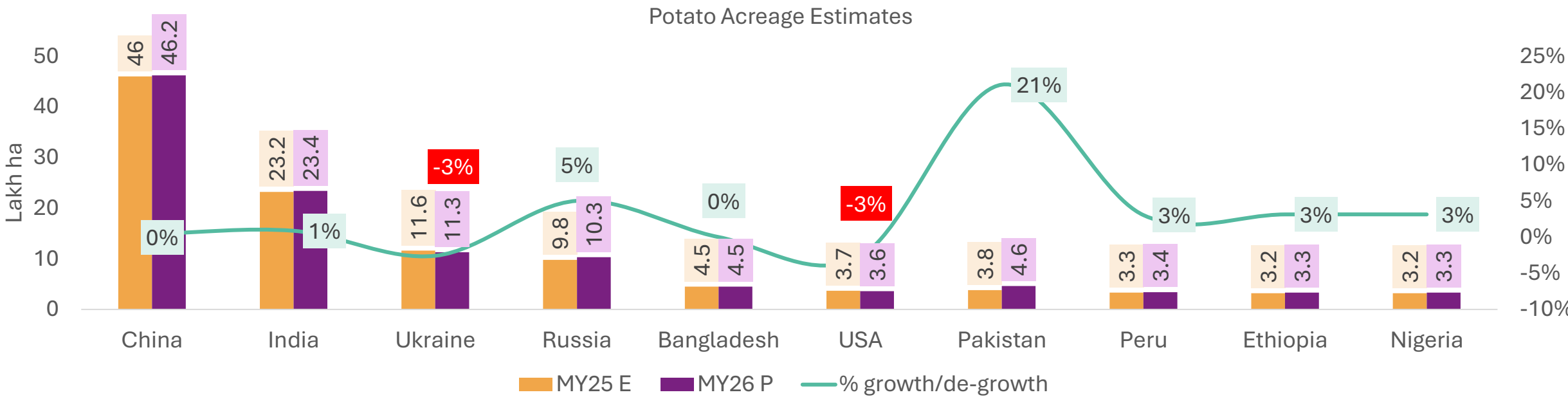
Countries	Season	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
China	North												
	South (Autumn)												
	South (Winter)												
India	Rabi												
Ukraine	Main												
Russia	Main												
USA	South												
	North												
Germany	Main												
Bangladesh	Main												
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 (Mar-Apr) —ensuring near year-round supply from the leading producer.
- 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.
- Harvest periods are concentrated in the second half of the year across most major producers, creating seasonal supply peaks that influence global trade flows, storage demand, and pricing dynamics.

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)

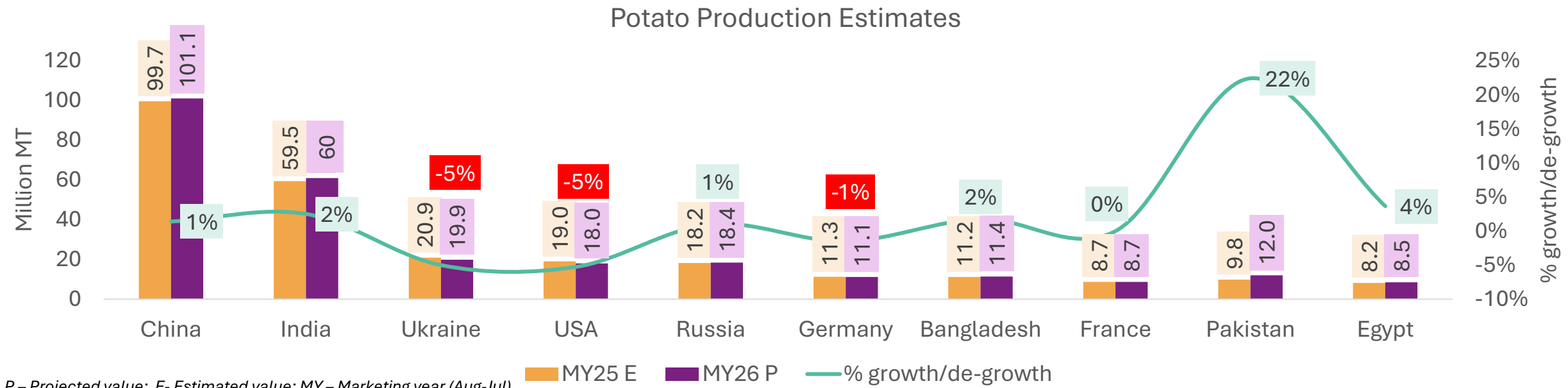
- The countries highlighted in the chart **account for nearly 66% of the world’s potato acreage**, with global potato acreage estimated to have marginally improved by ~1% on year in MY26P.
- **The United States is estimated to have seen a decline** in acreage due to lower contracted volumes from processors, surplus supplies, weak demand, and adverse weather conditions.
- **Russia is estimated to have seen a rebound** (~5%) in acreage on a low base, driven by improved price realization and domestic demand. **Ukraine’s**¹ acreage is estimated to **decline** (~3%) due to supply chain disruptions and weakened demand.
- **Pakistan’s potato acreage**² is estimated to **increase** by ~21% to 4.6 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](#)

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

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 estimate is driven by stable acreage, government food security measures, advancements in crop varieties, increased mechanization, and consistent yield improvements.
- **India’s output is estimated to have risen** 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 estimated to decline (~1–2%)**, as a ~7% reduction in **planted area** outweighs yield gains across key regions such as Lower Saxony and North Rhine-Westphalia.
- **US potato production² is estimated to decline ~5% in MY26P**, as **drought conditions** spanning **52%** of key growing states — with **Idaho, Colorado and Oregon** most critically exposed — reportedly **threatened yield potential, tuber quality**, and **contract fulfilment**, while **input costs surged 30–33%**, further pressuring grower output decisions.

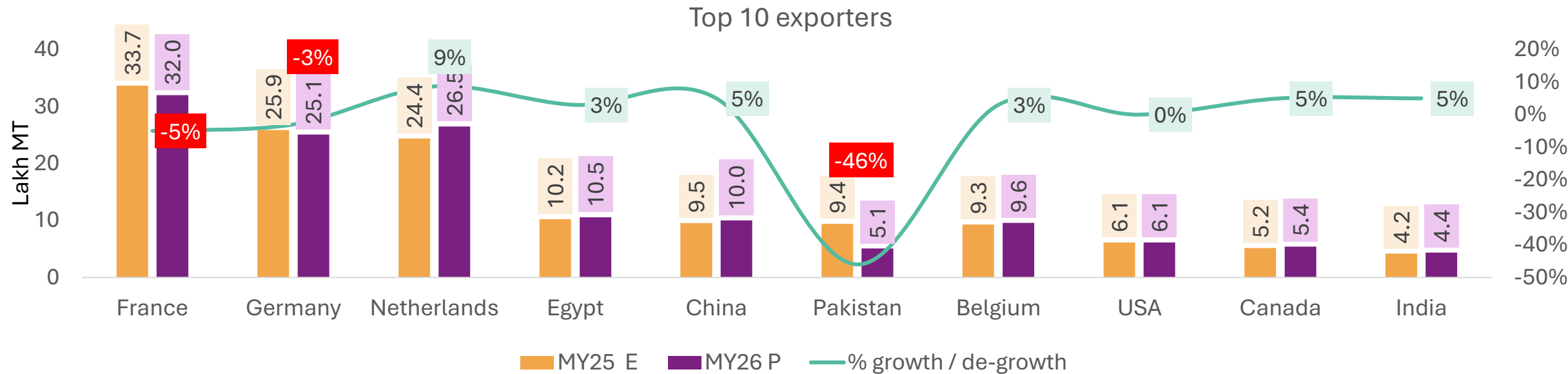
Source: Production for MY2025 and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT. India’s production has been referred from MoA&FW and projection based on trends and interactions.
1. [Germany’s production](#); 2. [USA’s production](#)

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

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. A white wake is visible behind the ship. In the background, a smaller ship is visible on the horizon under a blue sky with some clouds. Mountains are visible in the far distance.

Export Trends and Price Outlook

Major Exporters of Potato



% share of global exports	20%	15%	15%	6%	6%	6%	6%	4%	3%	2%
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P – Projected value; E- Estimated value;

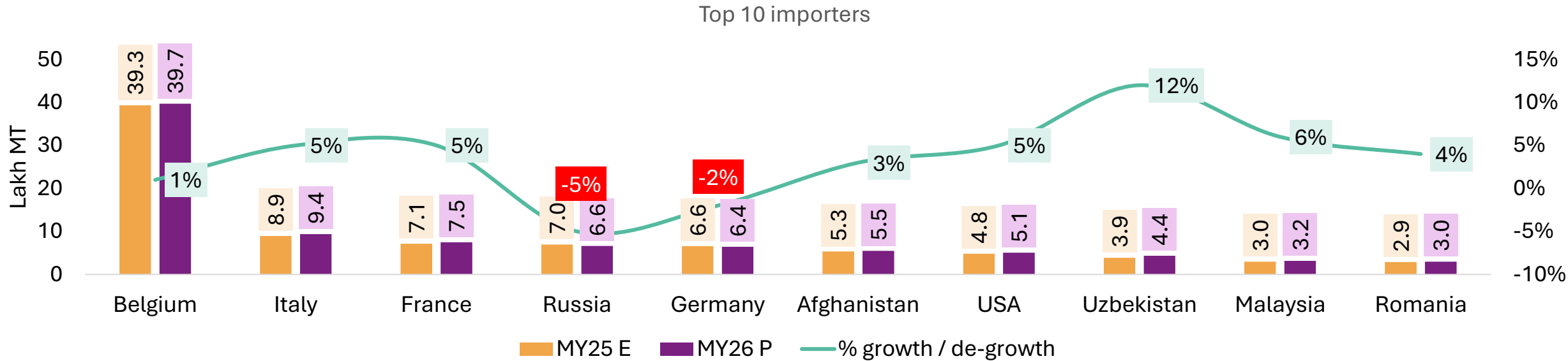
- The **countries in the chart account for about 83% of global potato exports**, with **exports for MY26P expected to decline by 2–3% year-on-year**.
- **In MY26P, Egypt’s potato exports are projected to grow by around 3%.** This expansion is driven by Egypt’s early harvest window, its proximity to key importing regions, and its ability to deliver consistent quality during seasonal supply gaps in destination markets.
- **France’s¹ potato exports are expected to remain under pressure in MY26P** despite ample carry-over stocks from the record 2025 crop. **Weak market absorption, large inventories** across **Northwest Europe**, and **subdued demand** are likely to **limit export growth**, resulting in a modest decline (~5%) in shipments
- **Canada’s² exports to increase by ~5% in MY26P**, 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 exports are forecast to decline by ~46% YoY to ~5.1 LMT in MY2026P**, as disruptions in Afghanistan—the destination for ~57% of exports—weigh heavily on outbound shipments. Although exports to Russia may recover following market reopening, the impact is expected to be limited due to Russia’s small (~1%) share in Pakistan’s overall export portfolio.

Source: MY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P 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](#)

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

Major Importers of Potato



% share of global imports	26%	6%	5%	5%	4%	4%	3%	3%	2%	2%
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P – Projected value; E- Estimated value;

- Belgium’s potato imports are projected to reach ~40 LMT in MY26P.** 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 MY26P**, driven by **greater consumer recognition** leading to **higher demand** for branded origin potatoes (**PDO 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 **MY26P 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 MY25) reduce import needs, with processors favoring local supply amid weak export demand.

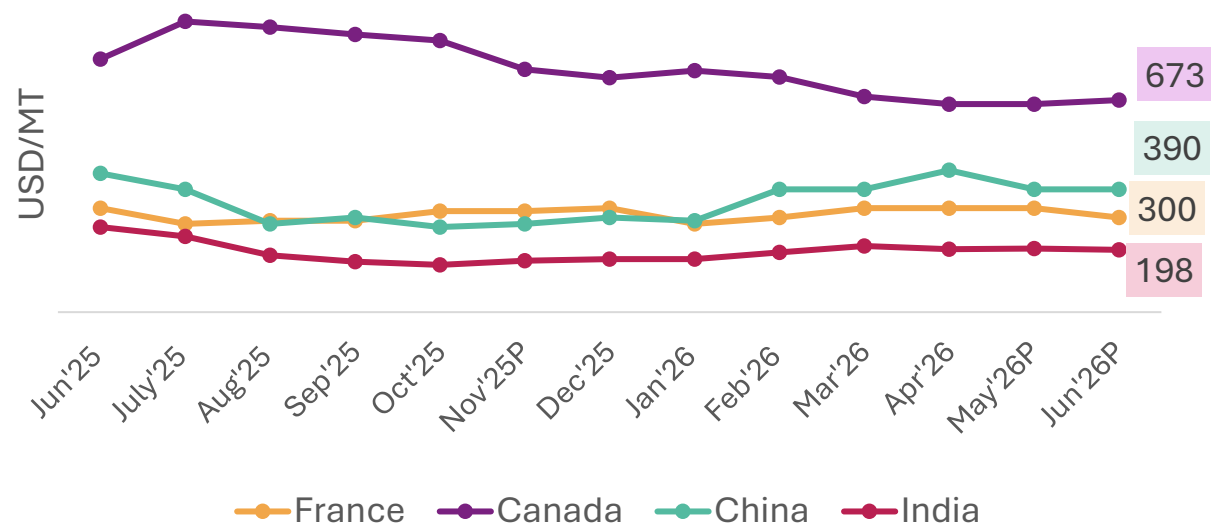
Source: MY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P projected figures are based on trade estimates & export trends. HS code 0701

PGI : Protected Geographical Indication, PDO : Protected Designation of Origin; 1:[Freshplaza](#); 2. [Russia’s imports](#) 3. [EU imports](#)

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

Price Trends of Key Exporting Nations

Export Price Trend



P – Projected value

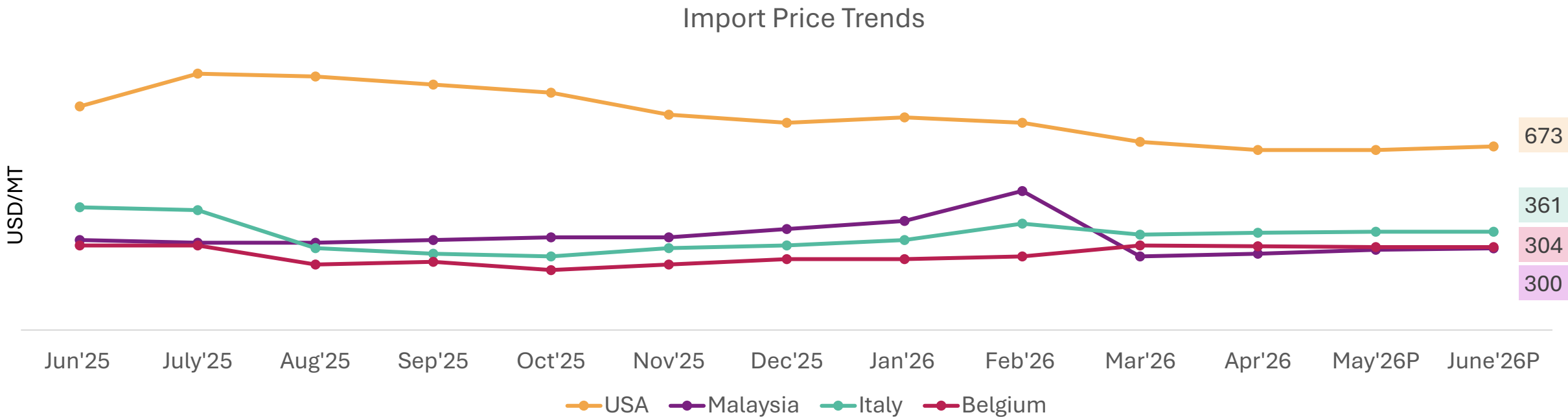
	Price outlook for next quarter (JAS)*				
Countries	June'26 P Price (USD/MT)	June'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JAS (USD/MT)
France	300	330	-9%	Sideways	270-330
Canada	673	803	-16%	Bullish	680-740
China	390	440	-11%	Sideways	360-420
India	198	270	-27%	Sideways	160-220

- **France’s potato export prices are estimated to have declined by ~9% MoM in June’26**, pressured by surplus inventories from the record 2025 crop (~8.7 MMT). Elevated carry-over stocks and inventory liquidation ahead of the 2026 harvest are expected to keep prices subdued in the near term.
- **Canadian potato export prices are expected to recover gradually during JAS’26**, as inventories in Alberta and Manitoba continue to decline ahead of the Sept–Oct harvest, tightening export availability and supporting prices.
- **China’s potato export prices are recovering after softening in Jan 2026**, supported by strengthening demand from Southeast Asian markets. However, improving supply availability is expected to keep prices broadly stable in the coming months.
- **India’s potato export prices are estimated to have declined by ~2% MoM in June’26 to ~USD 195–200/MT**. Ample supplies from cold-storage inventories are expected to support market availability and continue weighing on export prices in the near term.

Source: 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.

Price Trends of Key Importing Nations



P – Projected value

- **U.S. potato** import prices are projected to **rise moderately** in **June’26P** to **~USD 670-675/MT**, as **drought-driven domestic supply** uncertainty increases **Canadian¹ 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 in the upcoming months as Indian stocks tighten.
- **Italy’s potato import prices are expected to gradually recover** from a mid-MY25 decline, reaching **~USD 355-365/MT** by **June’26P**, supported by **strong demand for premium potato varieties** despite improving import availability.
- **Belgium’s oversupply** and the **EU surplus** (3.3 MMT) are estimated to have kept **import prices** suppressed at **~USD 290-310/MT** in **June’26P**. Weak export demand and competition from Asia are expected to constrain any significant price recovery beyond June’26P.

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

1. [Canada’s inventory pattern](#)

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.

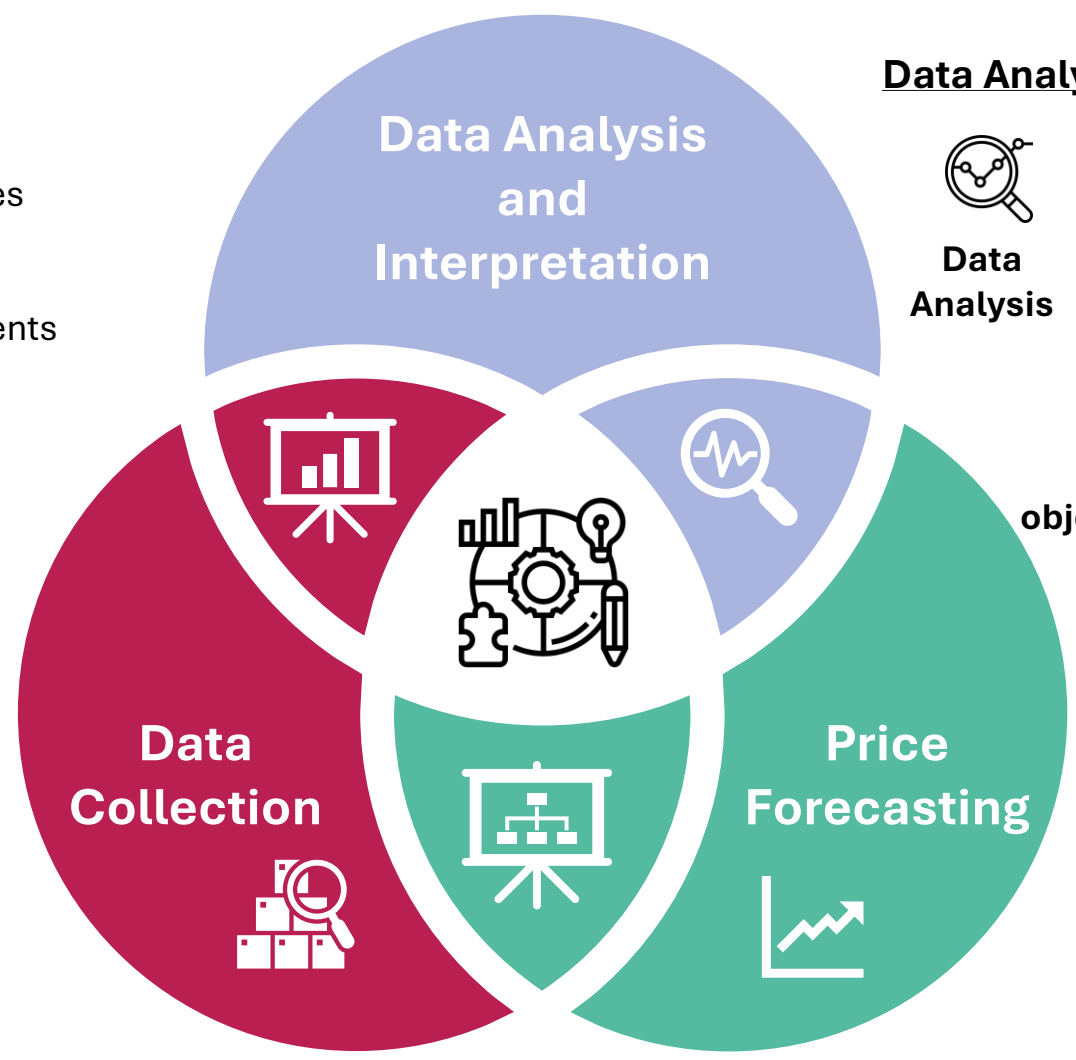
Data Collection

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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.