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LEBTRADE PORTAL

A GOLDMINE FOR EXPORTERS

Potatoes HS Code: 070190



Creating Export Opportunities by
MINISTRY OF ECONOMY & TRADE

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1. INTRODUCTION - WHICH MARKETS OFFER MOST OPPORTUNITIES FOR POTATOES FROM LEBANON?

Potatoes are one of the most widely traded staple food products in international markets, with strong demand for both fresh consumption and processed products such as frozen fries and chips. Potatoes represent a large share of global agricultural trade in volume terms and are essential for food security and the food processing industry.

Lebanon already exports a range of fresh fruits and vegetables, including potatoes, and benefits from experience in handling bulk agricultural products. This creates opportunities to strengthen its position in regional markets and expand exports further. However, as potatoes are a highly competitive and price-sensitive product, success depends on efficiency, quality consistency and market targeting.

This report provides an overview of Lebanon's current potato export position, global market trends, and the opportunities available to expand exports, with the aim of supporting Lebanese exporters in identifying the most promising markets.

2. PRODUCT DEFINITION

Potatoes are a key agricultural crop in Lebanon and are widely cultivated, particularly in regions such as the Bekaa Valley and Akkar. Production benefits from suitable climatic conditions and allows for seasonal supply that can complement production cycles in other countries. The main varieties are Spunta and Agria. The different climatic zones in Lebanon ensure diversity in harvesting periods.

Lebanese potatoes are mainly produced for fresh consumption, but there is also potential to supply processing industries depending on quality specifications.

3. WHERE DO LEBANESE POTATOES CURRENTLY GO TO?

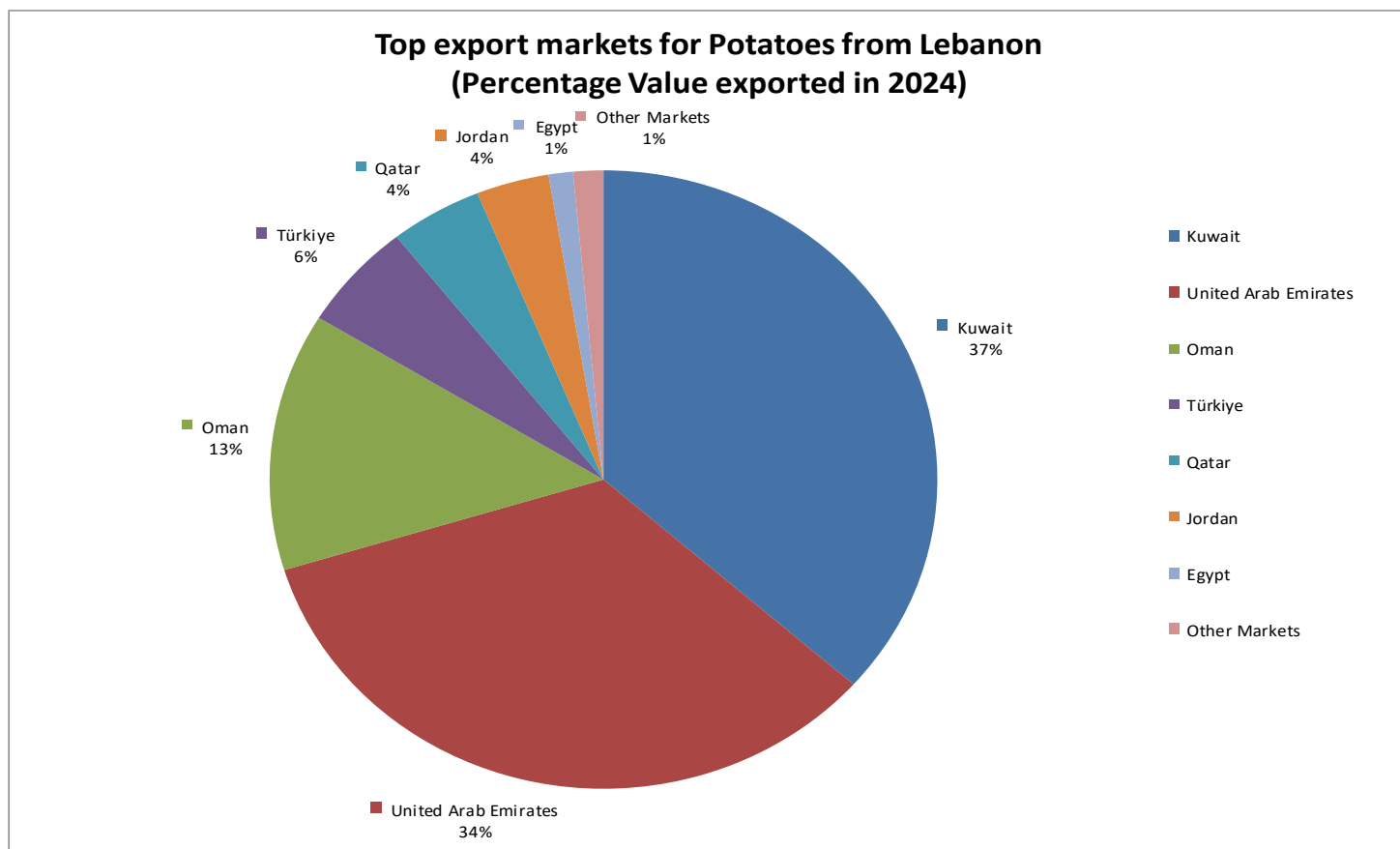


Figure 1. Top export markets for potatoes from Lebanon in 2024 - Source: ITC Trade map

As shown in figure 1, Lebanese potato exports are primarily directed towards regional markets, especially in neighbouring Arab countries and the Gulf. The main destinations typically include: Kuwait, United Arab Emirates (UAE), Oman, Turkey and Qatar topping the list. These markets account for the majority of Lebanon’s potato exports, indicating a strong dependence on nearby countries. This reflects advantages such as geographic proximity, lower transport costs and established trade relationships.

4. WHAT IS LEBANON’S POSITION IN THE INTERNATIONAL MARKET?

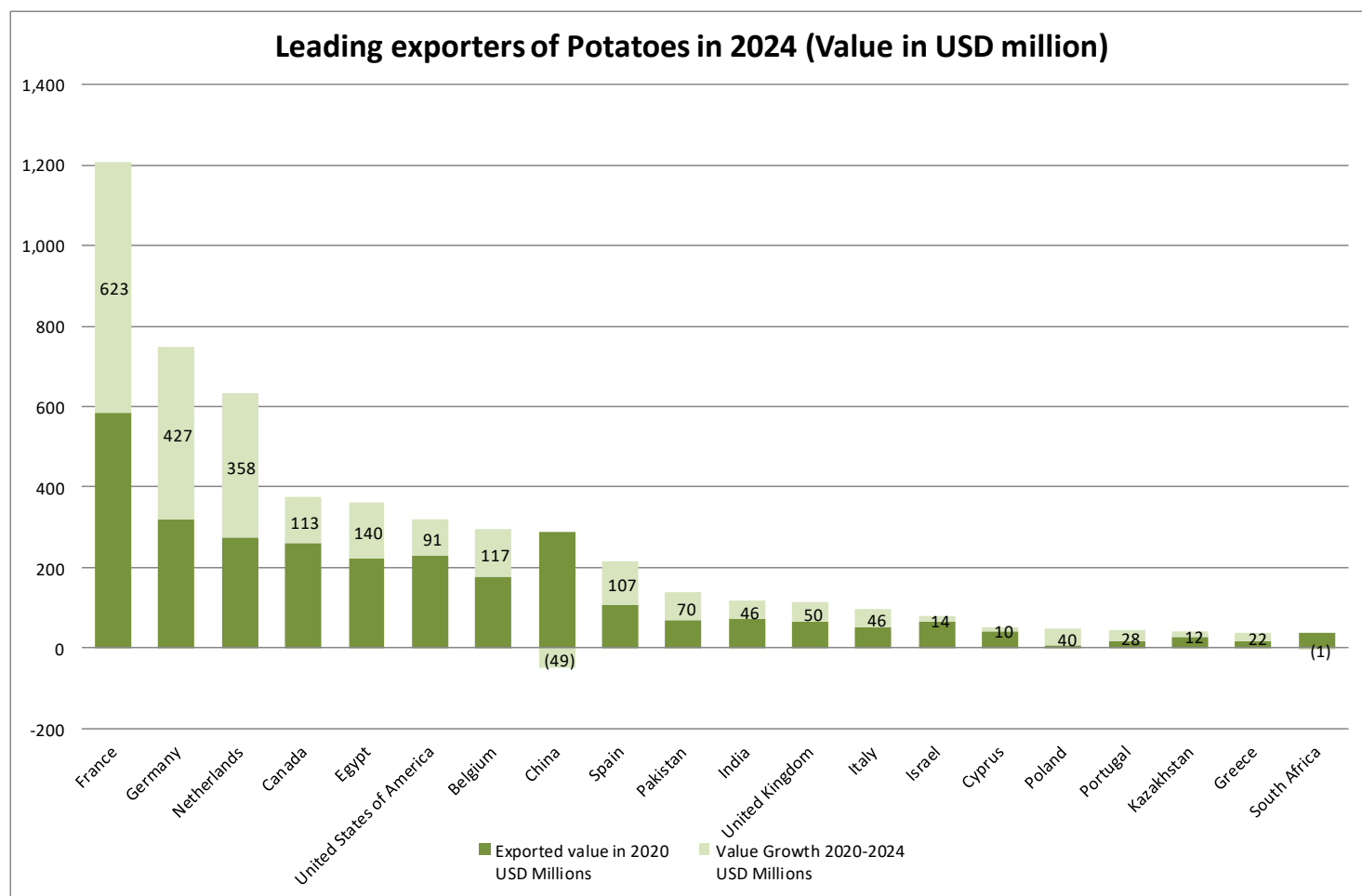


Figure 2. Leading exporters for Potatoes 2024 - Source: ITC Trade map

The global potato export market is dominated by a small number of large European suppliers, particularly: France, Germany, the Netherlands, Belgium and Spain. These countries account for a significant share of global exports due to their advanced agricultural systems and strong processing industries. Also among major producers of potatoes are Canada, Egypt and the United States of America (USA).

By comparison, Lebanon remains a small exporter in global potato trade. Its export volumes are limited relative to major suppliers. Lebanon’s potato exports over the 2020–2024 period showed moderate growth but remain relatively small compared with major global exporters. This indicates that while potatoes are an established export product, there is still significant potential to improve performance through better market positioning and stronger competitiveness.

Largest Potato Producers

The largest exporters of potatoes worldwide are concentrated in Europe. These countries benefit from high productivity, strong logistics and infrastructure and integrated processing industries. Their dominance makes the market highly competitive and difficult for smaller exporters to penetrate, especially in large and mature markets.

Largest Potato Producers in the Middle Eastern region

Within the Mediterranean region, key exporters include countries such as Egypt, Israel and Cyprus. Compared with these suppliers, Lebanon's exports are relatively small. This highlights the need for Lebanese exporters to focus on specific market niches or regional advantages, rather than competing directly with large-scale producers.

Table 1. Overview of potatoes harvest windows in the world's leading production countries

Country	J	F	M	A	M	J	J	A	S	O	N
Belgium											
France											
China											
India											
Israel											
Cyprus											
Egypt											
Lebanon											

Table 2. List of supplying markets for a product imported by the most potential European markets in 2024

Exporters	Import value 2024-M01	Import value 2024-M02	Import value 2024-M03	Import value 2024-M04	Import value 2024-M05	Import value 2024-M06	Import value 2024-M07	Import value 2024-M08	Import value 2024-M09	Import value 2024-M10	Import value 2024-M11	Import value 2024-M12
Importer: Netherlands												
World	40,143	44,431	58,361	59,506	69,488	70,705	69,260	52,045	41,403	47,216	44,345	66,830
France	4,404	6,217	5,929	6,219	6,416	6,738	9,582	2,240	3,266	4,552	6,288	5,792
Egypt	-	250	2,479	4,207	6,644	3,251	1,366	-	-	-	-	-
Israel	-	-	355	6,809	7,014	12,553	2,179	-	-	-	-	-
Importer: Germany												
World	17,226	20,305	36,421	44,592	54,011	58,345	33,025	11,336	14,332	14,507	15,057	36,995
France	7,499	8,390	7,012	4,976	3,578	2,448	2,299	3,422	6,489	6,750	5,936	9,954
Egypt	20	2,811	10,940	13,444	9,635	7,003	768	40	25	26	31	20
Israel	10	12	1,285	3,669	12,301	7,366	6,912	24	12	10	8	6
Importer: Spain												
World	62,018	68,380	80,154	80,058	45,230	20,647	16,306	32,507	51,383	37,388	45,099	67,270
France	42,211	43,909	46,749	46,138	29,880	8,300	5,291	24,704	32,266	27,976	31,950	39,073
Egypt	21	3,995	10,233	11,723	4,289	629	428	297	46	31	-	-
Israel	-	357	7,695	10,526	886	23	239	39	-	-	-	-
Importer: Belgium												
World	87,308	107,246	133,249	122,803	145,534	155,851	106,677	87,250	82,252	91,953	48,913	108,275
France	42,018	51,160	54,267	52,307	57,503	48,276	35,942	20,300	31,398	39,495	22,419	43,719
Egypt	-	296	4,867	2,391	298	171	1,602	235	-	-	-	-
Israel	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Importer: Italy												
World	36,556	57,511	62,482	52,212	42,733	19,581	4,779	12,529	23,035	29,494	27,819	36,445
France	16,901	21,003	20,321	16,945	17,409	5,855	2,268	5,585	11,032	12,963	12,121	16,838
Egypt	127	4,831	9,984	13,425	9,187	6,552	224	69	27	-	-	-
Israel	-	-	1,743	1,765	499	427	-	-	-	-	-	-

In table 1, the darker blue means it is a peak harvest month, whereas the clearer blue shows a slower harvest time.

Lebanon operates within a multi-season production cycle, allowing it to supply potatoes during extended periods. Spring harvest extends from April to June and late/fall harvest running from October to December while major competitors—especially in Europe—have more concentrated harvest periods.

It competes with Egypt early in the season and Spain in late spring, while strong competition from Netherlands, France, Germany and Belgium occurs from August onwards. Egypt competes directly with Lebanon in early season.

The most competitive months are May–June and August–September, when supply is high. The best opportunities are in April and late July, when competition is lower.

Lebanon can supply potatoes earlier than many European producers (early spring window). It can also extend supply into late summer, depending on region and altitude

5. WHAT ARE THE LATEST TRENDS IN TRADE?

5.1 WHAT ARE THE TRENDS IN THE 20 LARGEST IMPORTING COUNTRIES?

The global potato market has shown steady growth between 2020 and 2024, with increasing import values reflecting rising demand. The largest importing markets are mainly in Europe and include Belgium, the Netherlands, Spain, Italy, Germany and France. Many of these countries are not only consumers but also processing and re-export hubs, importing raw potatoes for transformation into processed products.

For Lebanese exporters, this means that the largest markets are also the most competitive and dominated by established suppliers. As for the American continent, USA is the main importer of potatoes, followed by Mexico.

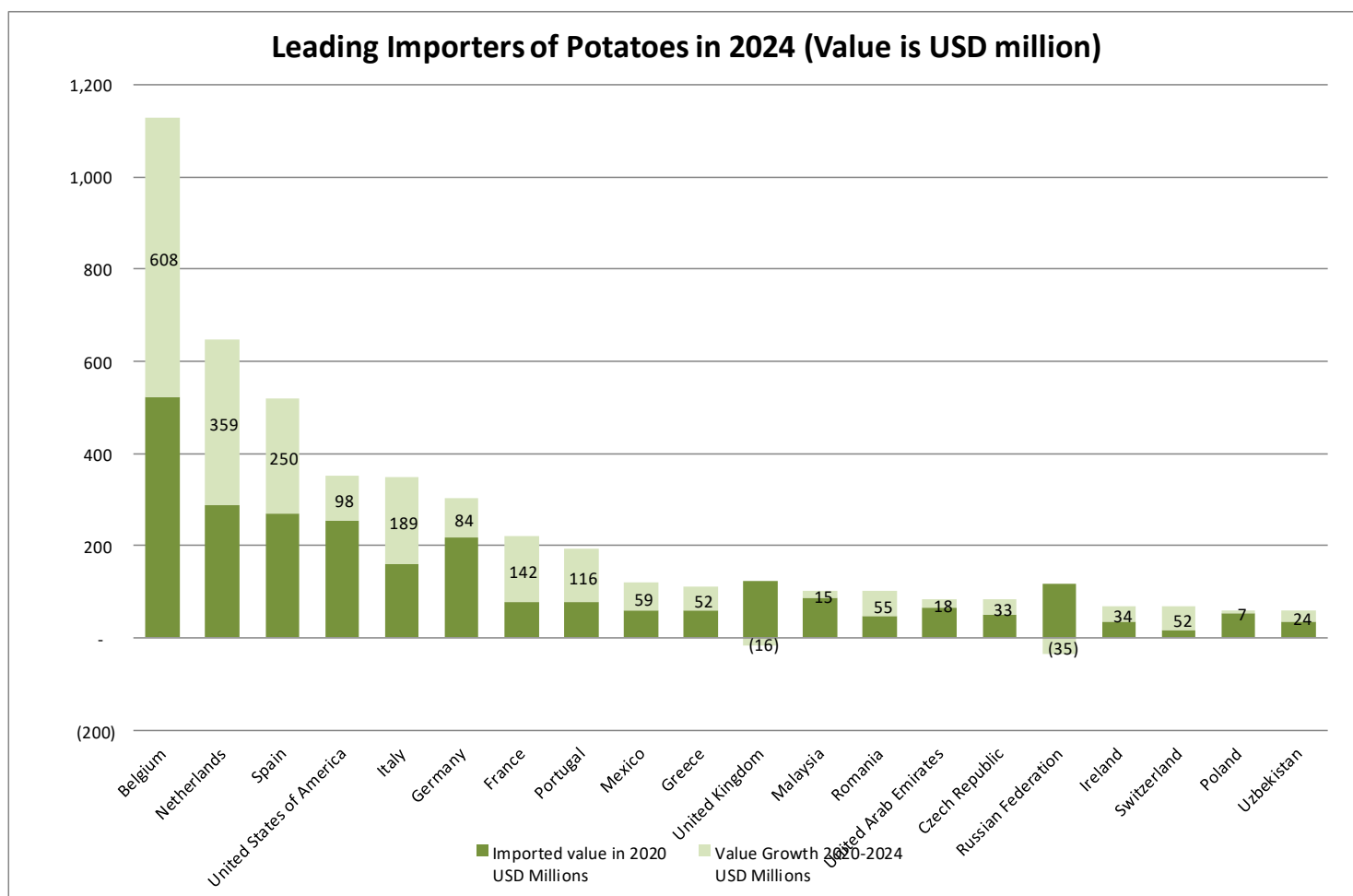


Figure 3. Leading importers for potatoes in 2024 - Source: ITC Trade map

5.2 WHAT ARE THE TRENDS IN TRADE IN THE EUROPEAN MARKET?

Europe is a large, mature and relatively stable market for fresh fruit and vegetables, with demand supported by extensive trade flows and year-round consumption. In the case of potatoes, however, the market is characterised mainly by strong domestic and intra-European supply. Potatoes fall within the category of cool-season open-field vegetables, for which European production dominates from autumn to spring, while imports mainly serve to cover temporary winter shortages.

Between 2020 and 2024, European vegetable imports increased and reached record levels, but trade in fresh vegetables remained largely intra-European, accounting for 85% to 88% of total trade. This underlines the strong competitive position of European producers in the potato market. At the same time, import opportunities can emerge when adverse weather, lower harvests or seasonal supply gaps reduce local availability. For example, that Egypt benefited from lower production volumes in southern Europe and recorded strong export growth to Europe, including in potatoes.

For suppliers targeting the European potato market, market access depends on more than competitive pricing alone. Exporters must align supply with seasonal windows, identify periods of reduced European availability, and comply with strict buyer requirements concerning quality, food safety and pesticide residues. In a market where local supply is dominant and standards are high, successful trade depends on reliability, timing and full compliance with European regulations.

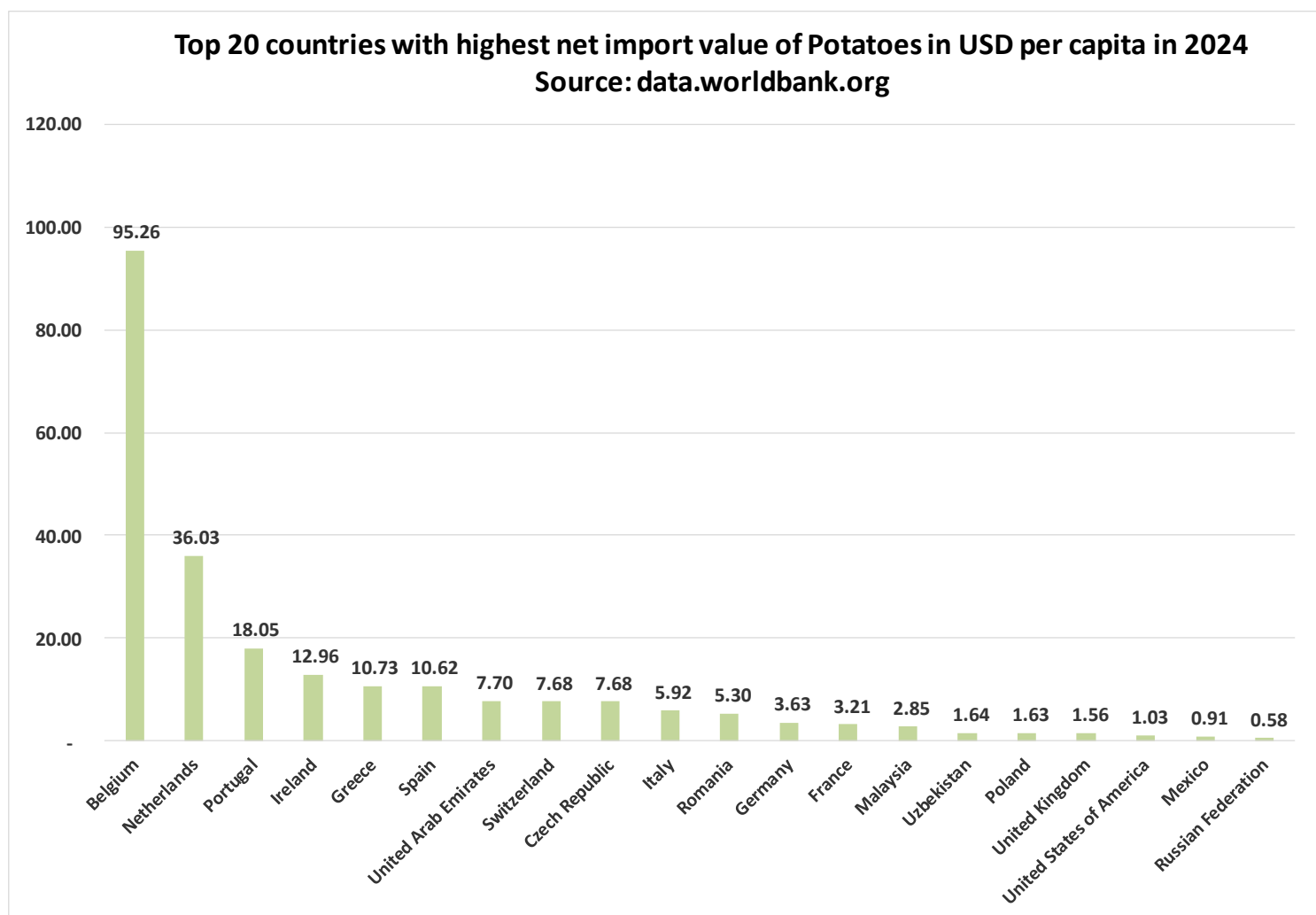


Figure 4. Top 20 countries with highest net import value of potato in USD per capita in 2024 - Source: ITC Trade map

Figure 4 shows that Belgium, the Netherlands, Portugal and Ireland were the most import-intensive potato markets per capita in 2024. For exporters, this points to established import demand and potentially attractive trade opportunities. Meanwhile, markets such as Italy and the UAE, despite lower per capita import values, may offer room for future export growth.

5.3 WHAT ARE THE TRENDS IN TRADE IN THE MIDDLE EASTERN MARKET?

The Middle Eastern market is smaller in size but highly relevant for Lebanon. Key importing countries include, the UAE, Oman, Kuwait, Iraq, Saudi Arabia and Qatar. As shown in Figure 5 below, there is still a lot of growth possible in most of the GCC market countries.

These markets show growing demand linked to population and income growth dependence on imports and lower trade barriers compared with Europe. For Lebanese exporters, the GCC offers a more accessible and strategically important market.

A more realistic strategy is to focus on regional markets while building on existing trade relationships and gradually expanding into selected new markets.

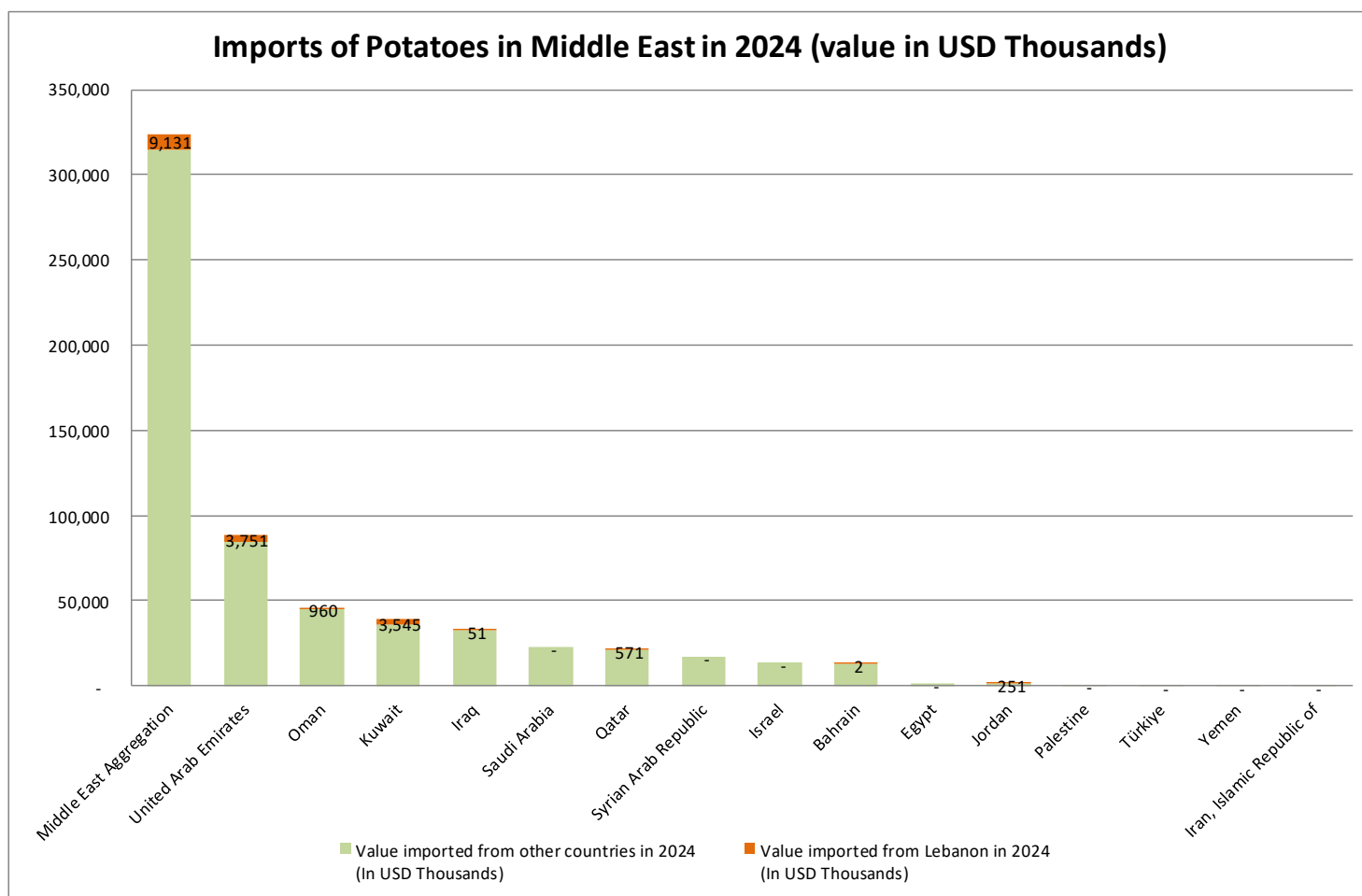


Figure 5. Imports of potatoes in Middle East in 2024 - Source: ITC Trade map

Figure 6 shows that Oman, Bahrain, the UAE, Kuwait and Qatar stand out as the most import-intensive potato markets per capita in 2024 in the Middle East. This particular market demand is largely driven by fresh consumption, the food service sector (restaurants and fast food) and increasing demand for processed products. This makes the region particularly relevant for exporters like Lebanon.

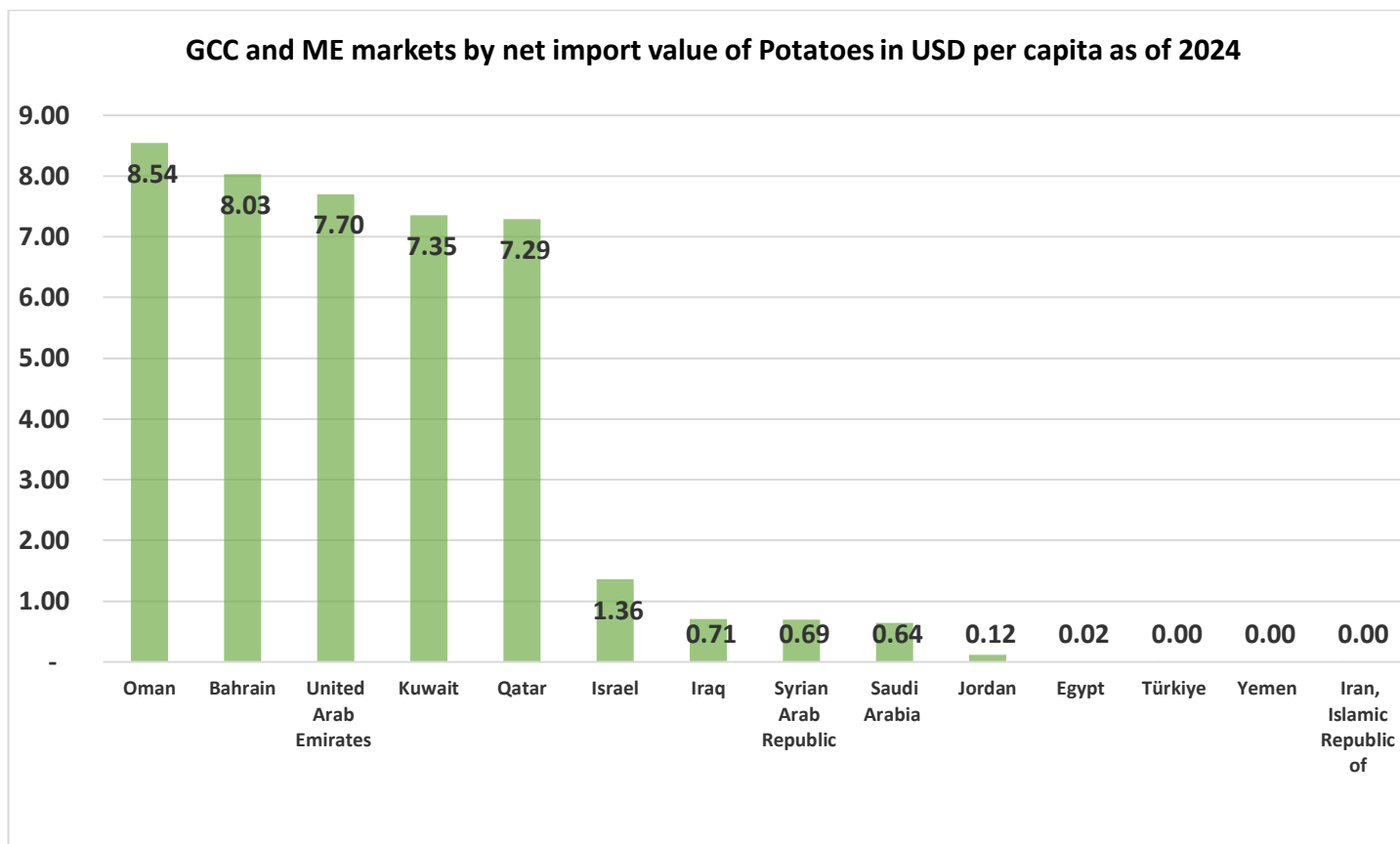


Figure 6. GCC and ME imports of potatoes in USD per capita as of 2024 - Source: ITC Trade map

6. WHAT ARE INTERESTING MARKETS FOR THE FUTURE?

Potatoes are a relatively stable product with steady global demand, but the strongest export opportunities are in markets that combine import growth, accessibility and moderate competitive pressure. For Lebanese exporters, the most attractive short-term opportunities are in nearby regional markets, particularly the United Arab Emirates, Saudi Arabia, Kuwait and Oman. These destinations benefit from geographic proximity, growing demand and familiarity with Lebanese agricultural products, making them more accessible for immediate export expansion.

In the medium term, selected European markets also offer strong potential, especially Germany, the Netherlands, Belgium and France. These markets are large and commercially attractive, but they are also more demanding. Entering them requires strong compliance with quality, phytosanitary and marketing standards, as well as the ability to compete with well-established suppliers.

To identify the most promising export destinations for Lebanese potatoes, a market selection model was developed using a set of trade and market access indicators. These included global import demand, Lebanon's current export performance and growth, tariff conditions compared with leading competitors, average distance of suppliers, supplier concentration, import trade windows, import value of potatoes in USD per capita, and other relevant factors.

Based on the analysis presented in Table 3, eight markets were identified as offering strong potential for Lebanese potato exports: Belgium, the Netherlands, Spain, Germany, Italy, France, the United Arab Emirates and Oman. These markets show growing potato imports, relatively attractive import value per capita, and sourcing patterns that are not limited to neighboring suppliers. This is an encouraging sign for Lebanon, as it suggests that buyers in these markets are open to diversified origins and may offer entry opportunities for competitive Lebanese exporters.

Table 3 below provides an overview of these priority markets and the main indicators used in the assessment.

Table 3. Top 8 European and Middle Eastern potential markets for Lebanese potatoes

Market	Import value 2024 (USD Million)	Imported volume 2024 (Tons)	Annual growth in value 2020–2024 (%)	Avg. distance of suppliers (km) ¹	Concentration of suppliers ²	Import value per capita (USD/person) ³	Tariffs (%)
Belgium	1,129,643	3,803,437	25%	353	0.33	95.26	5.3%
Netherlands	648,339	2,286,183	21%	443	0.42	36.03	5.3%
Spain	518,939	N/A	22%	1,131	0.52	10.62	5.3%
Germany	302,788	518,062	10%	1,362	0.14	3.63	5.3%
Italy	349,287	840,845	26%	1,031	0.28	5.92	5.3%
France	219,979	524,267	34%	680	0.22	3.21	5.3%
United Arab emirates	84,637	349,802	9%	2,941	0.14	7.70	0.0%
Oman	45,125	126,234	14%	2,615	0.24	8.54	0.0%

¹ The average distance of supplier's measures how far an importing country sources its potatoes. Higher values indicate that imports originate from more distant countries, while lower values suggest that imports are sourced mainly from neighboring countries.

² The concentration of suppliers is an index ranging between 0 and 1. Values closer to 0 indicate a diversified supplier base, with imports sourced from multiple countries, while values closer to 1 indicate a high concentration, meaning imports are sourced from a small number of countries (typically two or three).

³ The ratio of imports of potatoes in USD value and the population of each country.

7. INTERPRETATION AND TIPS

- Seasonality is a key factor in the potato trade. Opportunities arise when major exporters are out of season and supply gaps appear in target markets. Lebanese exporters can gain an advantage by aligning production and shipment schedules with these windows and focusing on periods of lower competition.
- Market size alone is not enough; ease of entry also matters. Exporters should assess not only demand, but also how easy it is to enter and compete in each market. GCC markets generally offer easier access, with lower tariffs and fewer entry barriers, while the European Union is more demanding and requires strict compliance with quality, certification, traceability and food safety standards.
- Do not compete on price alone. Large suppliers dominate high-volume potato markets and usually benefit from economies of scale. Lebanese exporters should instead compete on reliability, good timing, consistent quality and the ability to supply buyers when the market needs additional volumes.
- Start with the UAE and Oman. These markets are more accessible than Europe and offer realistic short-term opportunities for Lebanese exporters. The UAE is especially attractive because it also serves as a regional trading hub, which can help exporters reach other Gulf markets through one importer or distributor.
- Prepare carefully before entering Europe. European buyers expect full compliance with phytosanitary requirements, food safety rules, traceability systems and product specifications. Exporters should also pay close attention to pesticide residues, as non-compliance can lead to shipment rejection and damage buyer confidence.
- Target supply gaps rather than peak competition periods. When supply from major origins is limited, buyers are more open to alternative suppliers. Lebanese exporters should therefore focus on export windows when the market is short and demand for supplementary imports is stronger.
- Protect quality after harvest. Good grading, proper packaging, careful handling, effective cooling and a reliable cold chain are essential to maintain quality during transport. Post-harvest performance is critical for reducing claims, protecting margins and building long-term relationships with buyers.