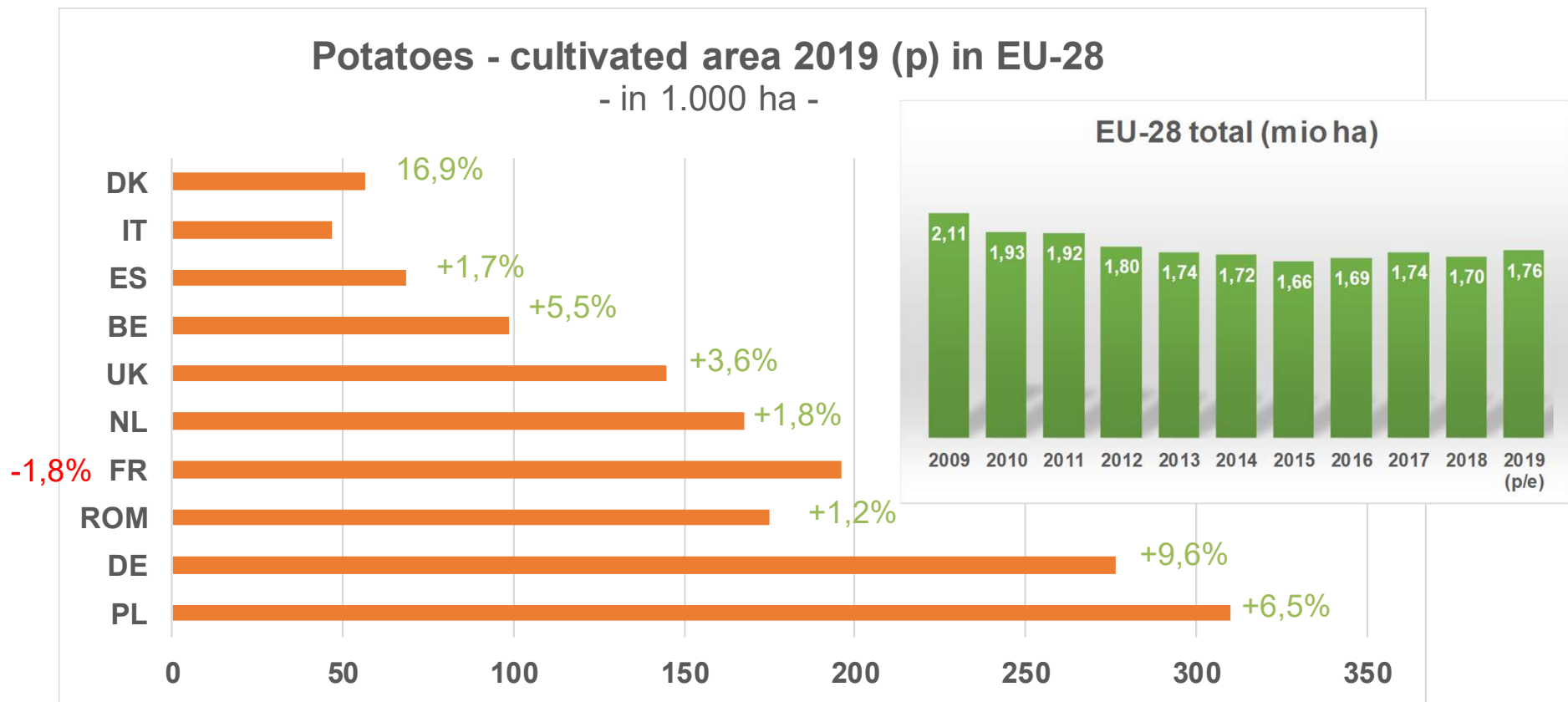


Market situation for starch potatoes



CDG Arable crops - starch
2nd December 2019, Brussels



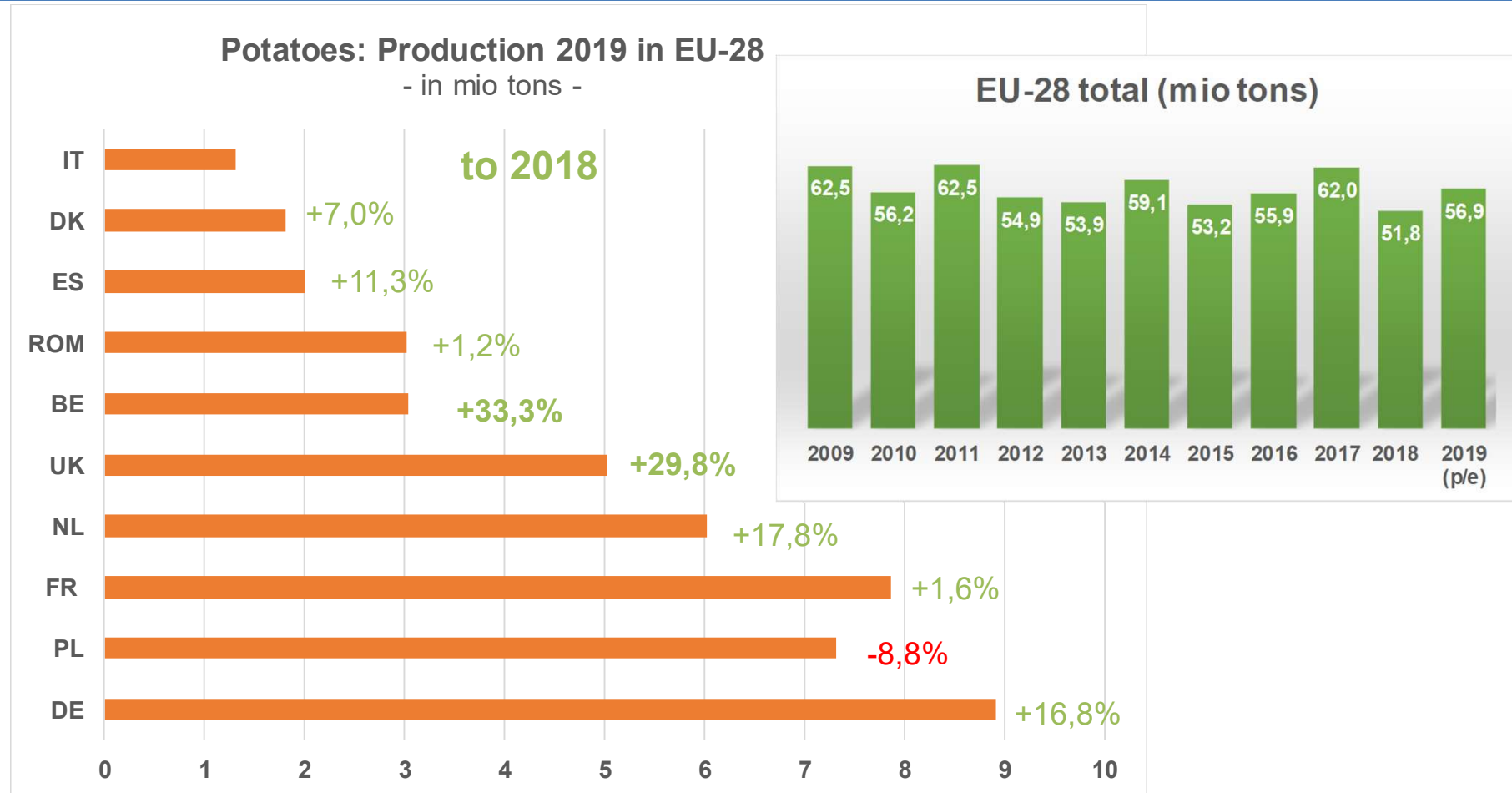
- EU-28 (p/e): 1,76 mio ha
 2018: 1,70 +3,5%
 2014/18: 1,70 +3,5%

Source:
Eurostat/BVS

- Different developments by use of potatoes (less for fresh market, but more for processing, starch and seed)

EU Potato production

BVS

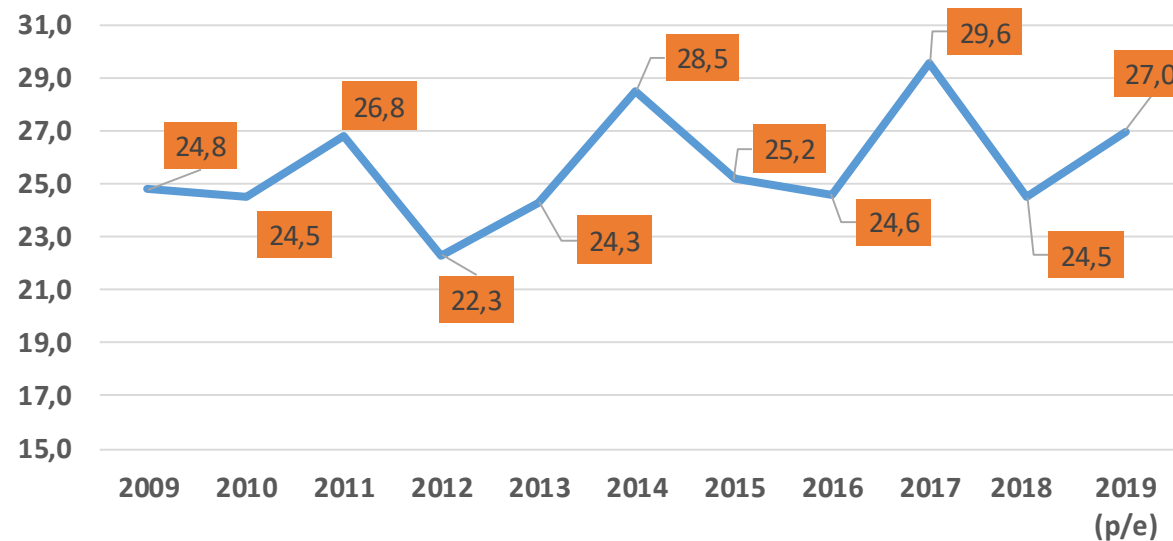


- EU-28 2019: 56,9 (p/e) mio tons
 - to 2018 (disastrous): + 9,8%
 - to 2014-2018: + 0,9%

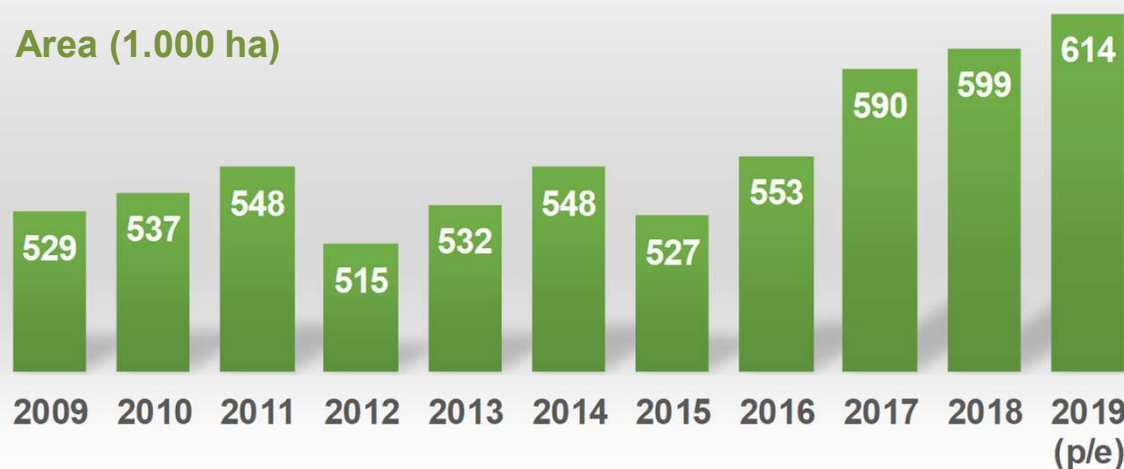
Source:
Eurostat/BVS

- North-Western Europe better than eastern parts (PL!...)
- Qualities

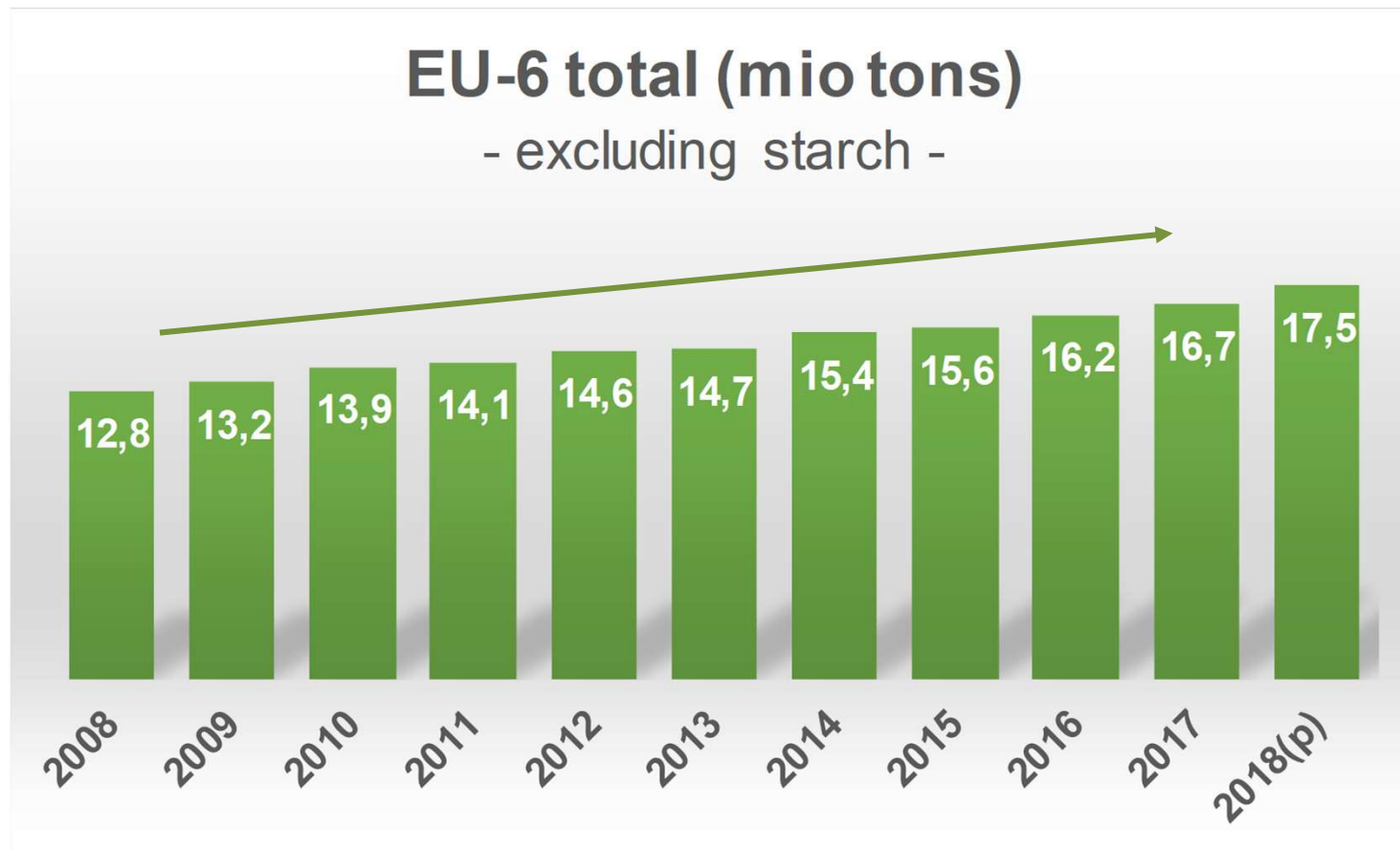
Production EU-5 total (mio tons)
- potatoes for consumption -



Area (1.000 ha)



Source:
NEPG/BVS



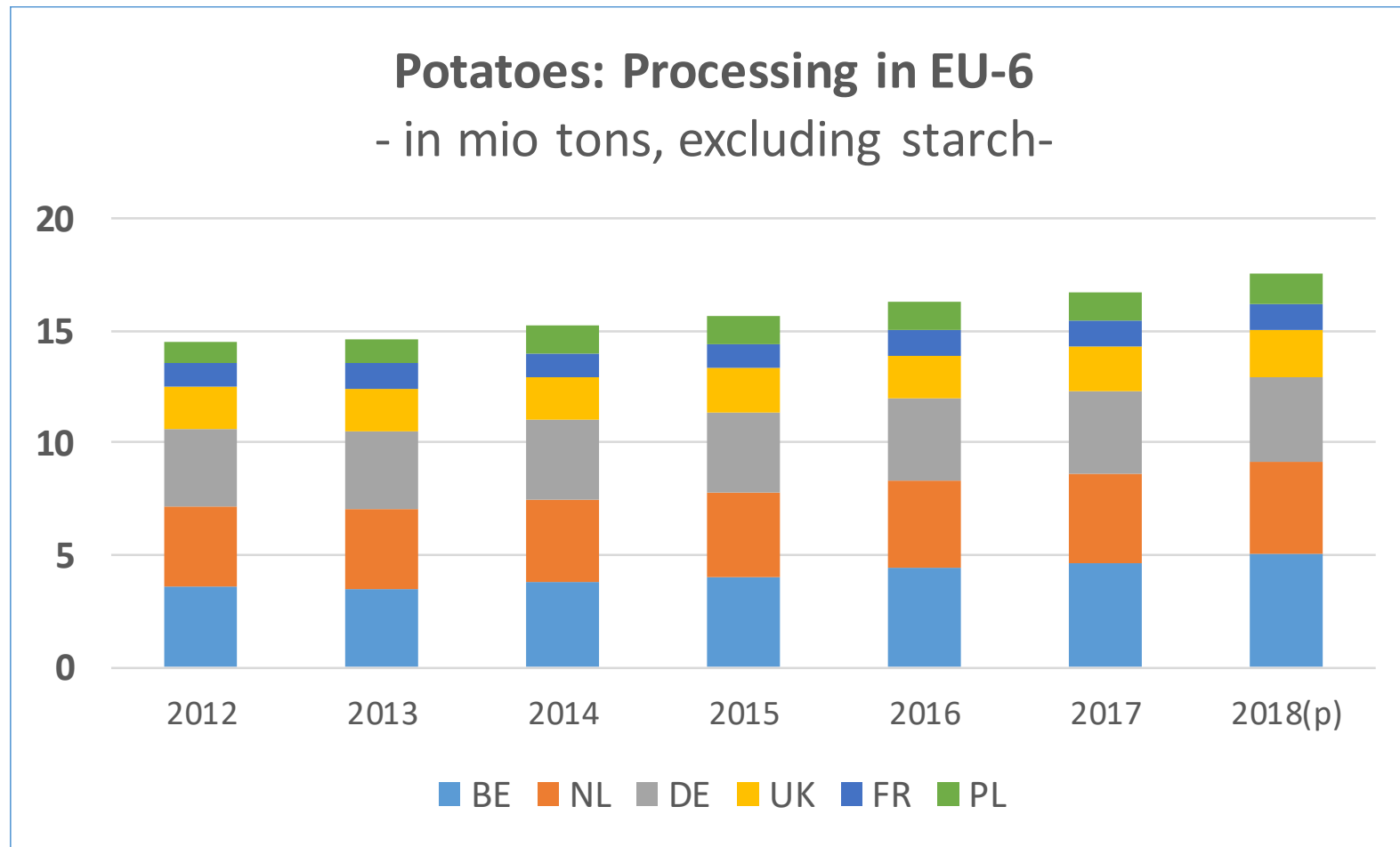
* EU-6: BE, DE, FR, UK, NL, PL

- EU-6: increase to 17,5 mio tons (= +33%)
- 2018: much lower yields, problems with quality
- 2019: better harvest

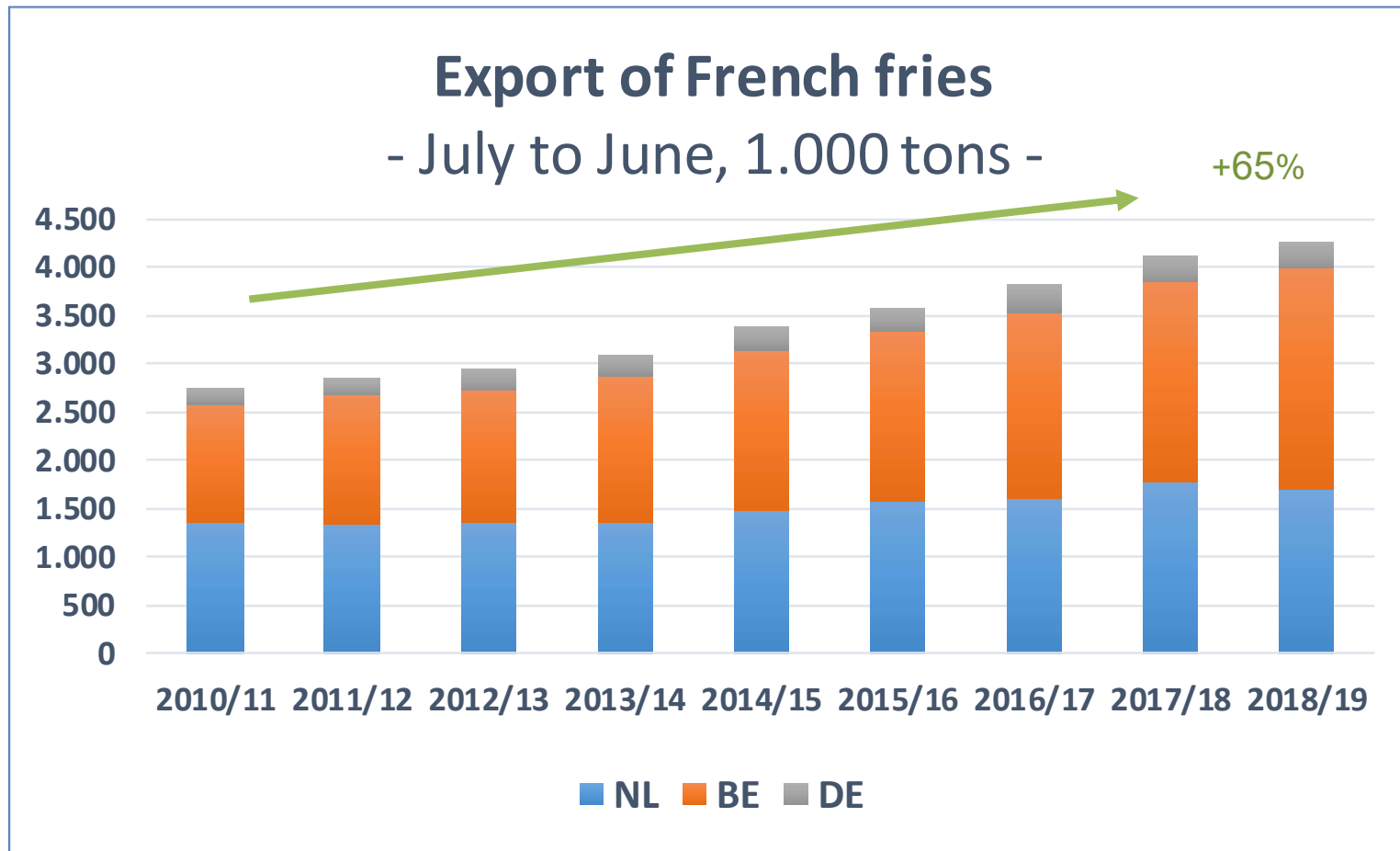
Source:
UNIKA/AMI

EU Potato processing

BVS



Source: AMI/UNIKA



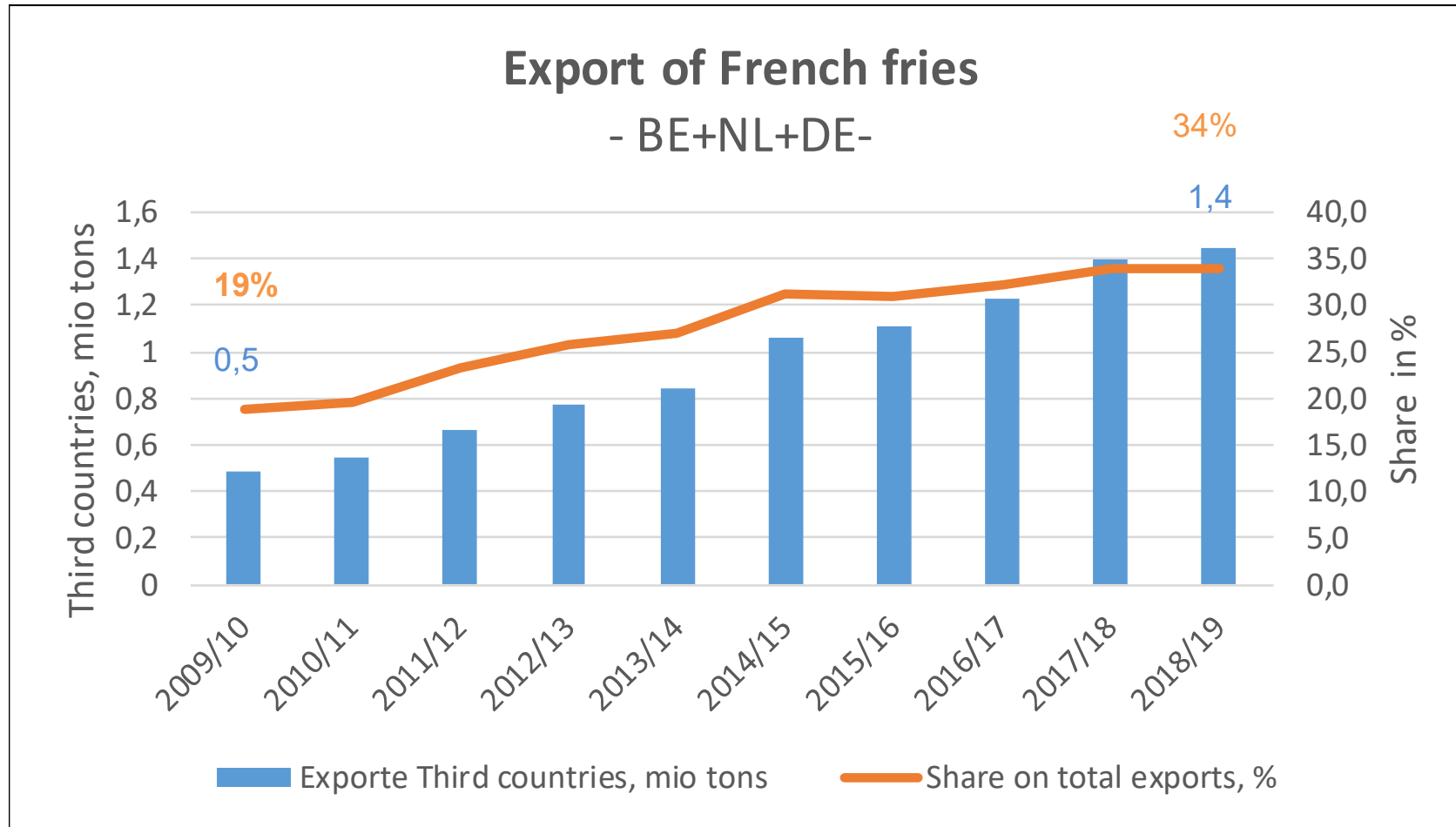
Total exports increased in only one decade by 65%

Source:
UNIKA/AMI

- 2010/11: 2,6 mio tons
- 2018/19: 4,3 mio tons (UK main destination with 721.000 tons)

EU: Export of French fries

BVS



- Top-3 destinations: Saudi Arabia, Brazil, RUS
- USA / Canada further important supplier on the world market

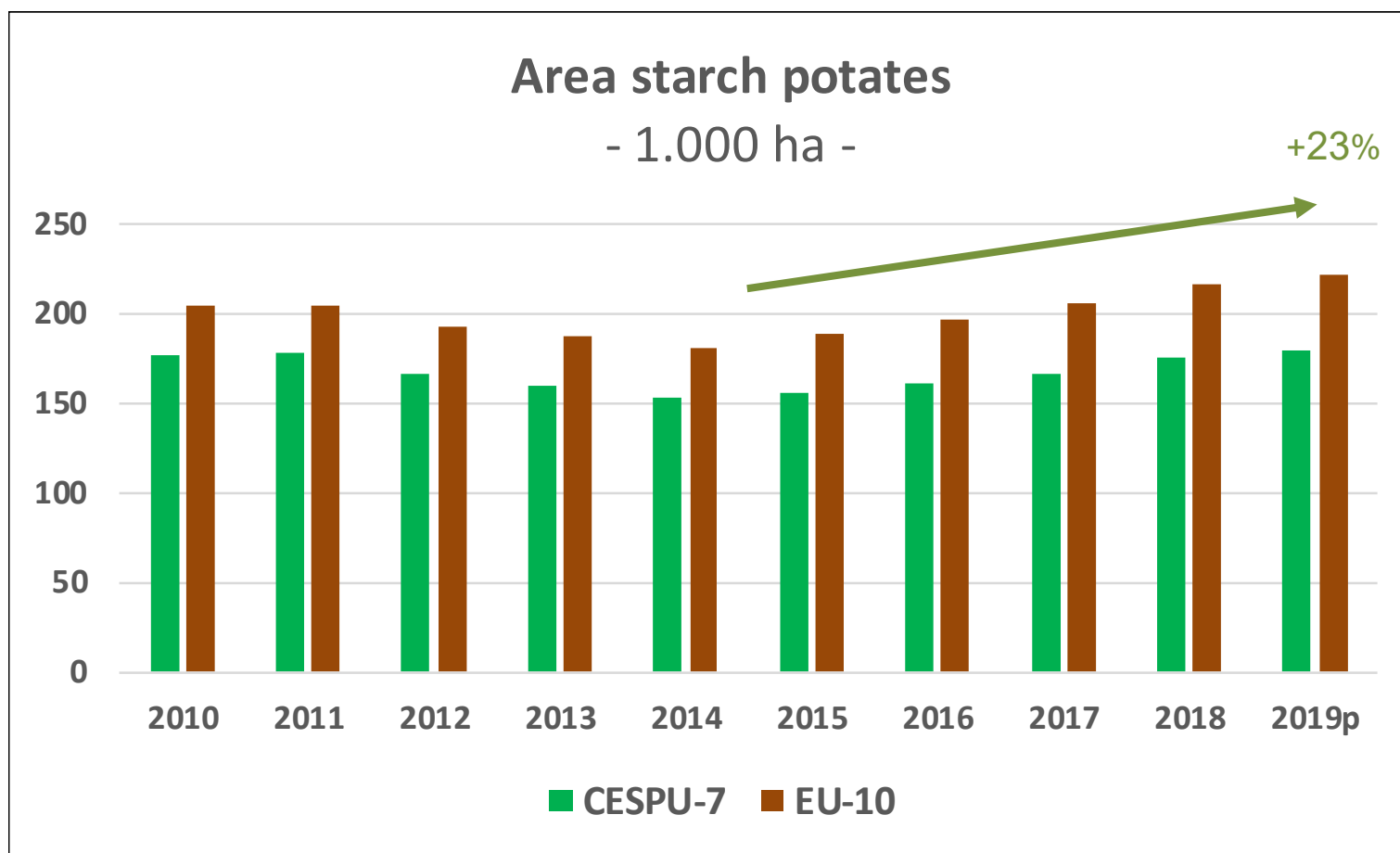
Source:
UNIKA/AMI

Prices

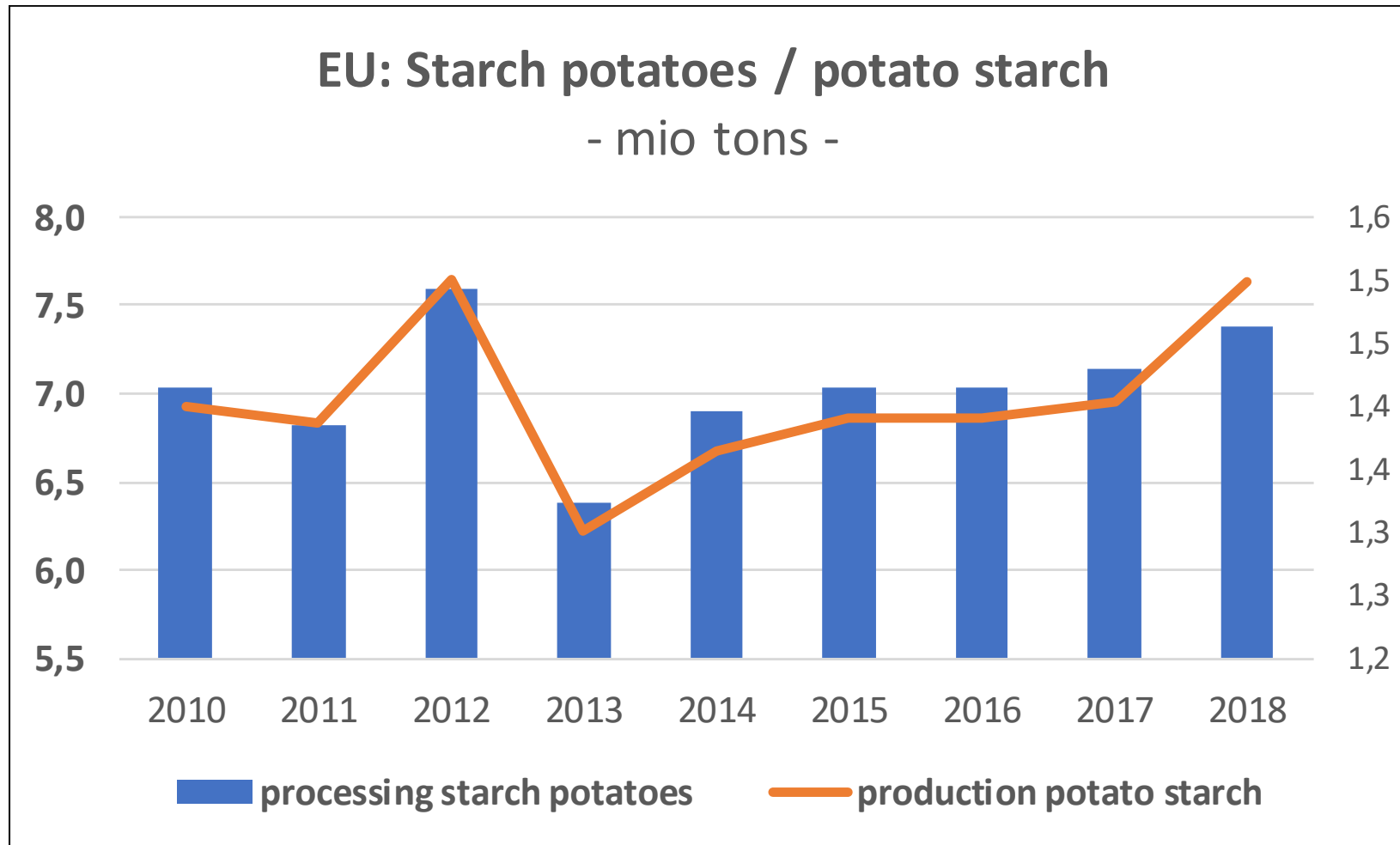
BVS

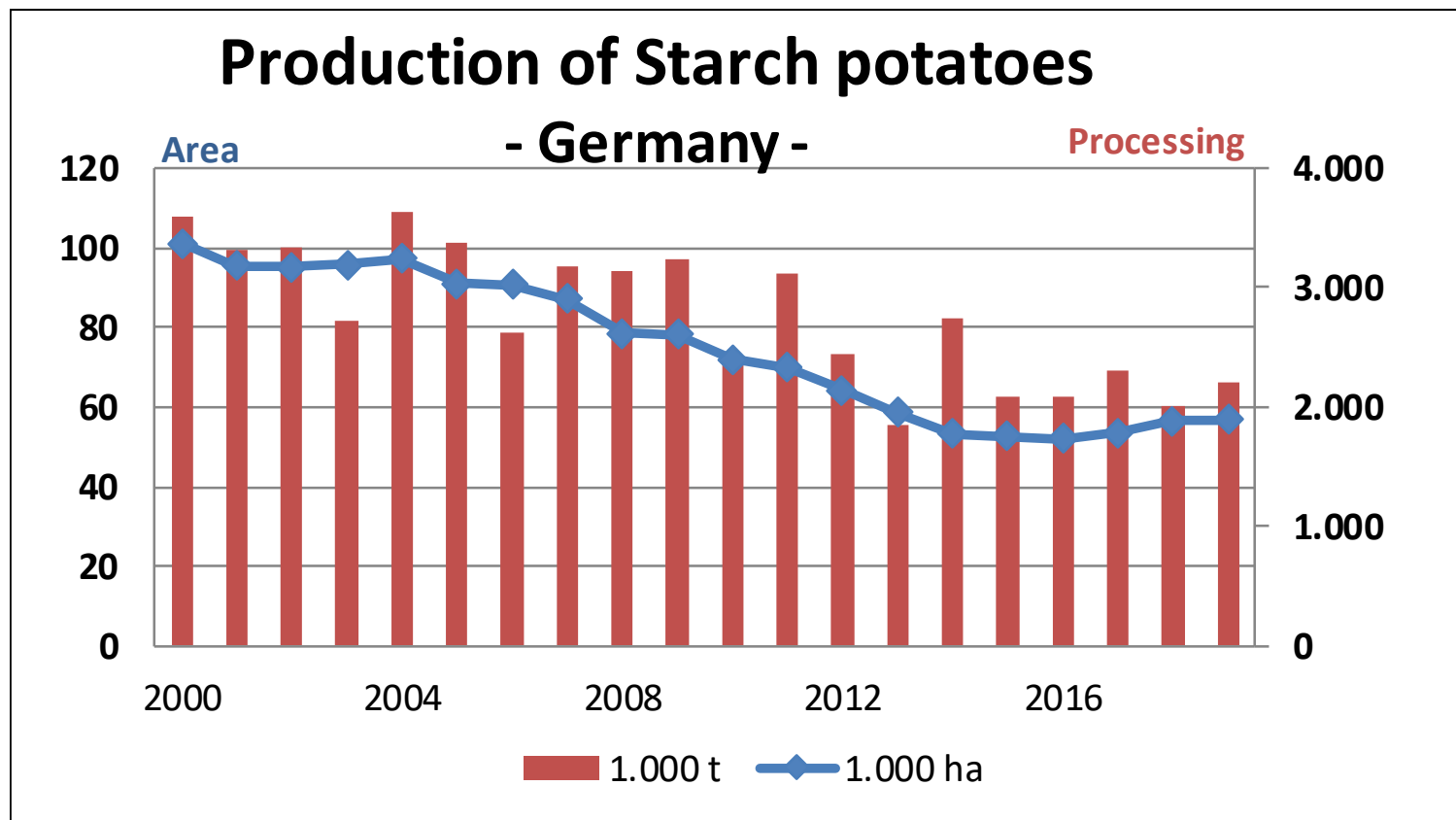
	22.11.2019	23.11.2018	2017
<u>Germany: Ware potatoes</u> (fresh market)	Euro/100 kg	Euro/100 kg	
Producer prices (EUR/100 kg)	22,00 – 26,00	27,00 – 32,00	11,00 – 13,00
Consumer prices (EUR/kg)	0,72	0,91	0,71
<u>Processing 35+</u>	Euro/100 kg	Euro/100 kg	
Innovator/Agria/Fontane (DE)	12,50 – 14,00	27,00 – 29,00	4,00
Fiwap/PCA Fontane/Challenger	12,50	25,00 – 27,00	3,00 – 4,00
Belgapom Fontane/Challenger	12,50	25,00	5,00
Potato NL	12,50 – 15,00	26,00 – 30,00	3,00 – 6,00

Source: UNIKA



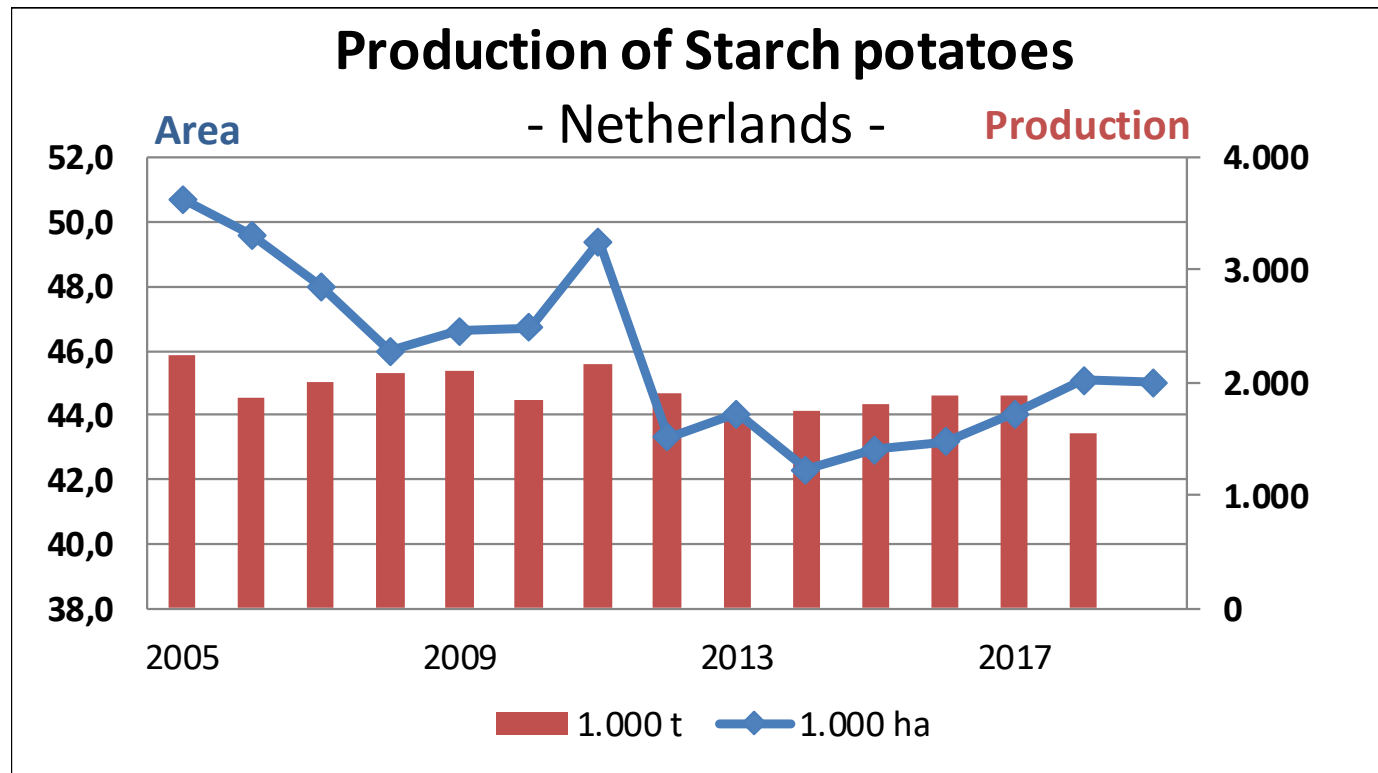
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019p
CESPU-7	176,3	178,1	165,9	160,1	152,5	156,2	161,1	166,7	175,8	179,3
EU-10	203,8	204,5	193,1	187,6	180,7	187,9	196,0	205,2	216,7	221,9





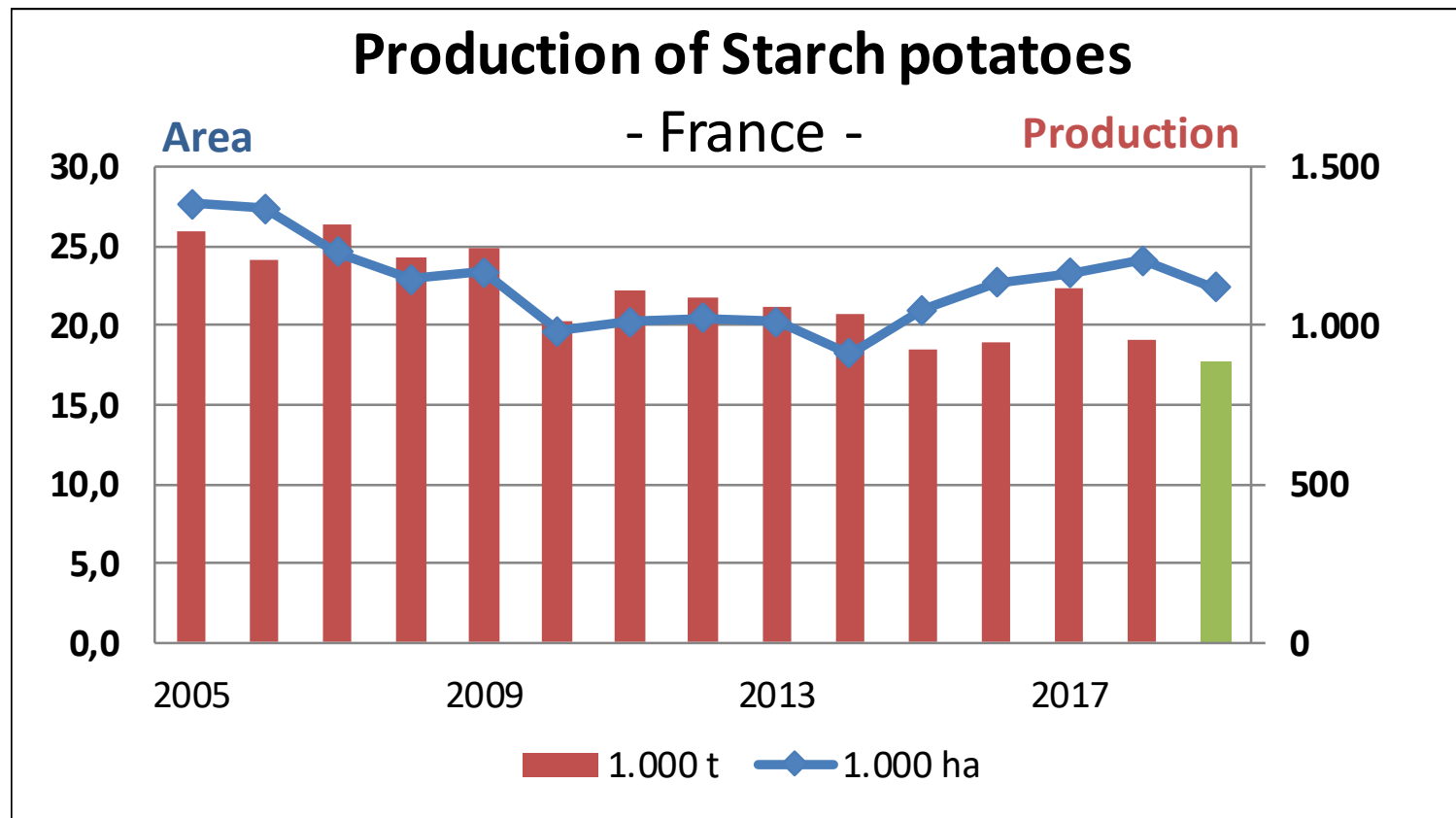
Source:
BVS

- potato harvest 2019 (total): 10,4 mio tons:
 - 17% more than 2018 (with 8,9 mio tons lowest level since 1990)
 - 2013/18: 10,5 mio tons
- starch potatoes 2019: 57.000 ha (p) = +360 ha
- yields better than 2018, but not in all regions



2019 (p):

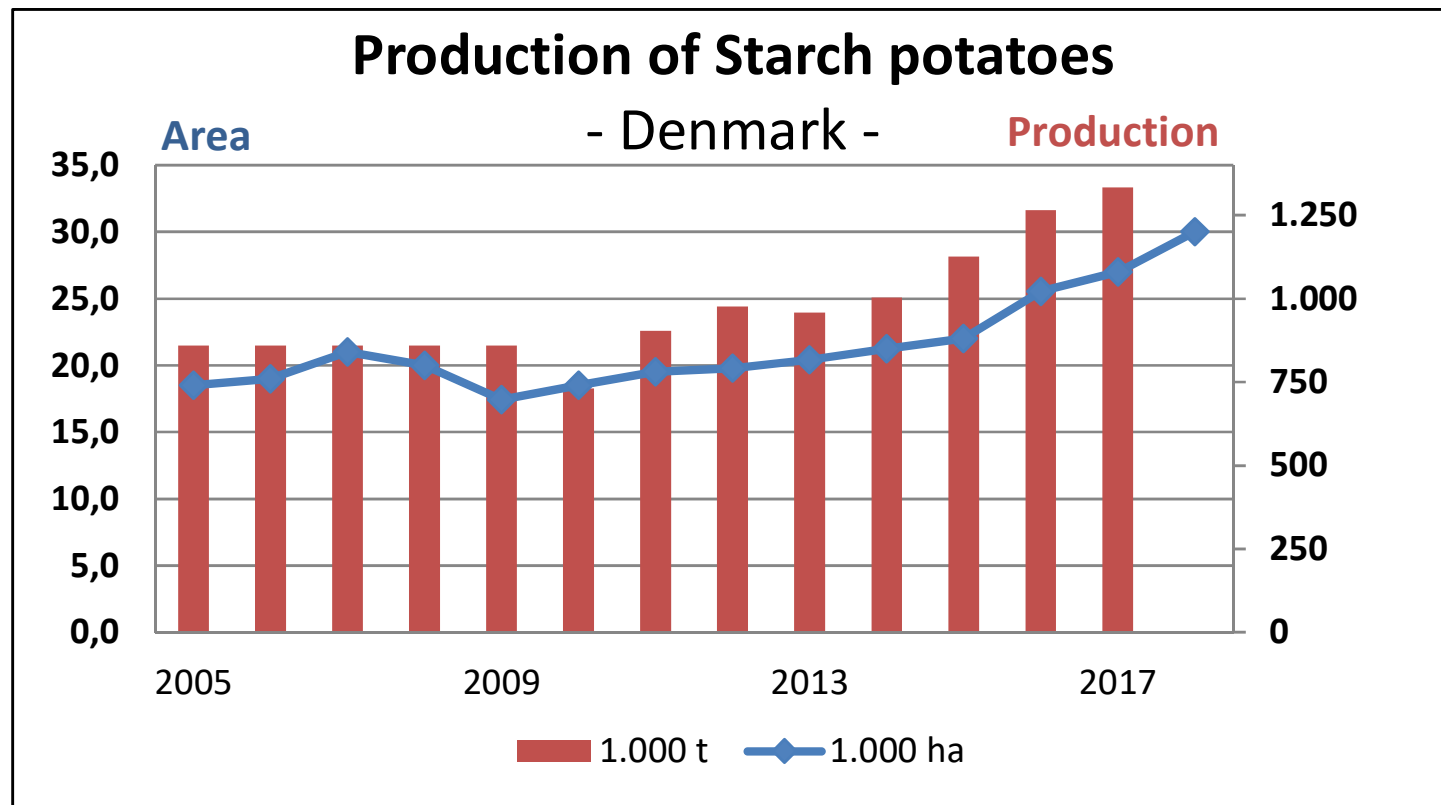
- Starch potatoes: 45.012 ha (- 65 ha), yields higher than 2018, but lower than average
- Potato total: 167.600 ha (+ 3.000 ha or 1,8%)



Source: Agreste/
CESPU

2019 (p):

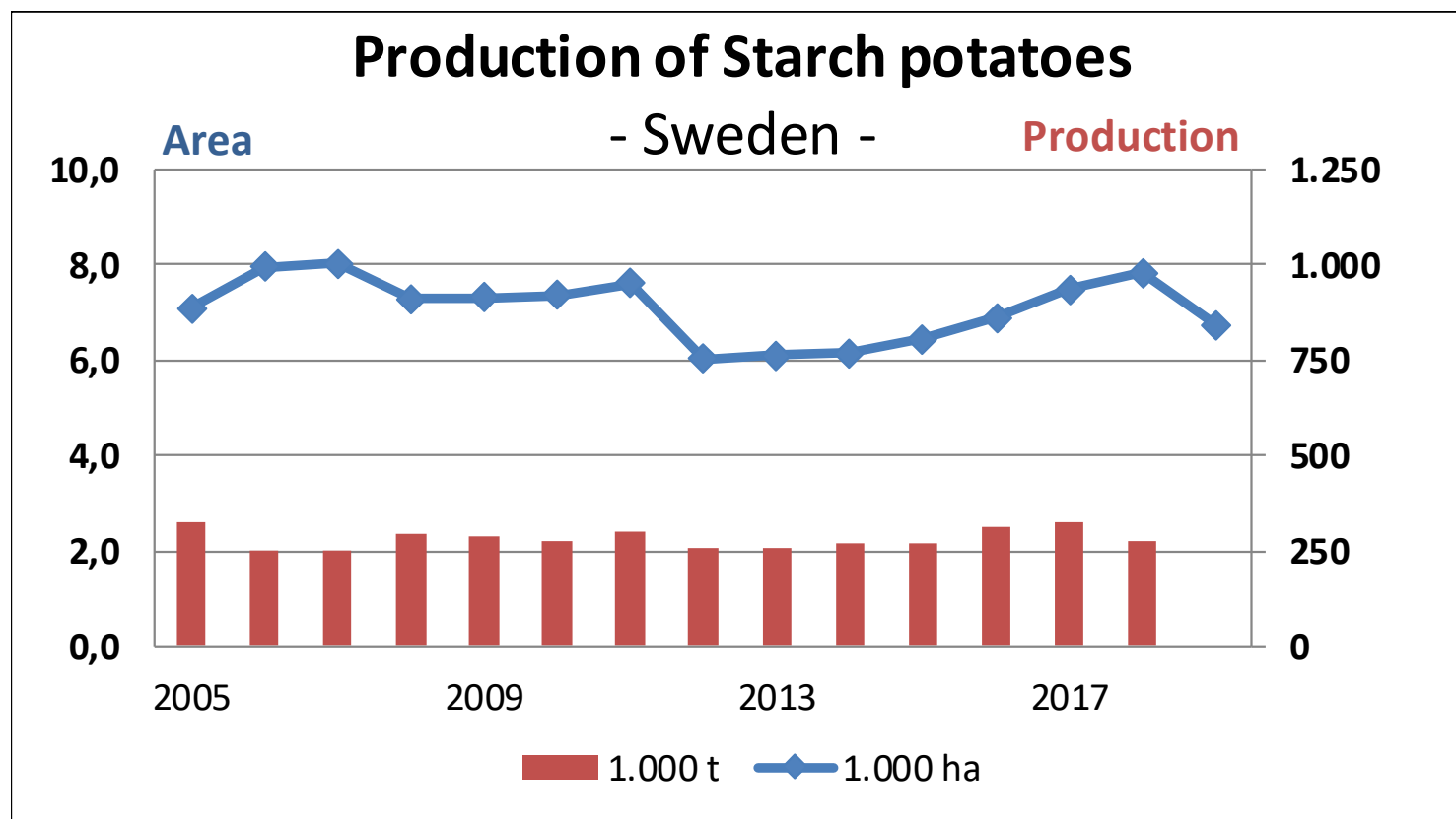
- Starch potatoes: 22.400 ha (- 1.700 ha, -7%), yields higher than 2018, but lower than average
- Potatoes total: 196.000 ha (2018: 199.560 ha), but higher area for consumption potatoes (148.300 - 152.000 ha)



2019 (p)

- further increase of starch potato area to over 33.000 ha (2018: 28.800 ha)
- For potatoes total: 56.805 ha (2018: 48.805)
- Better yields than last year

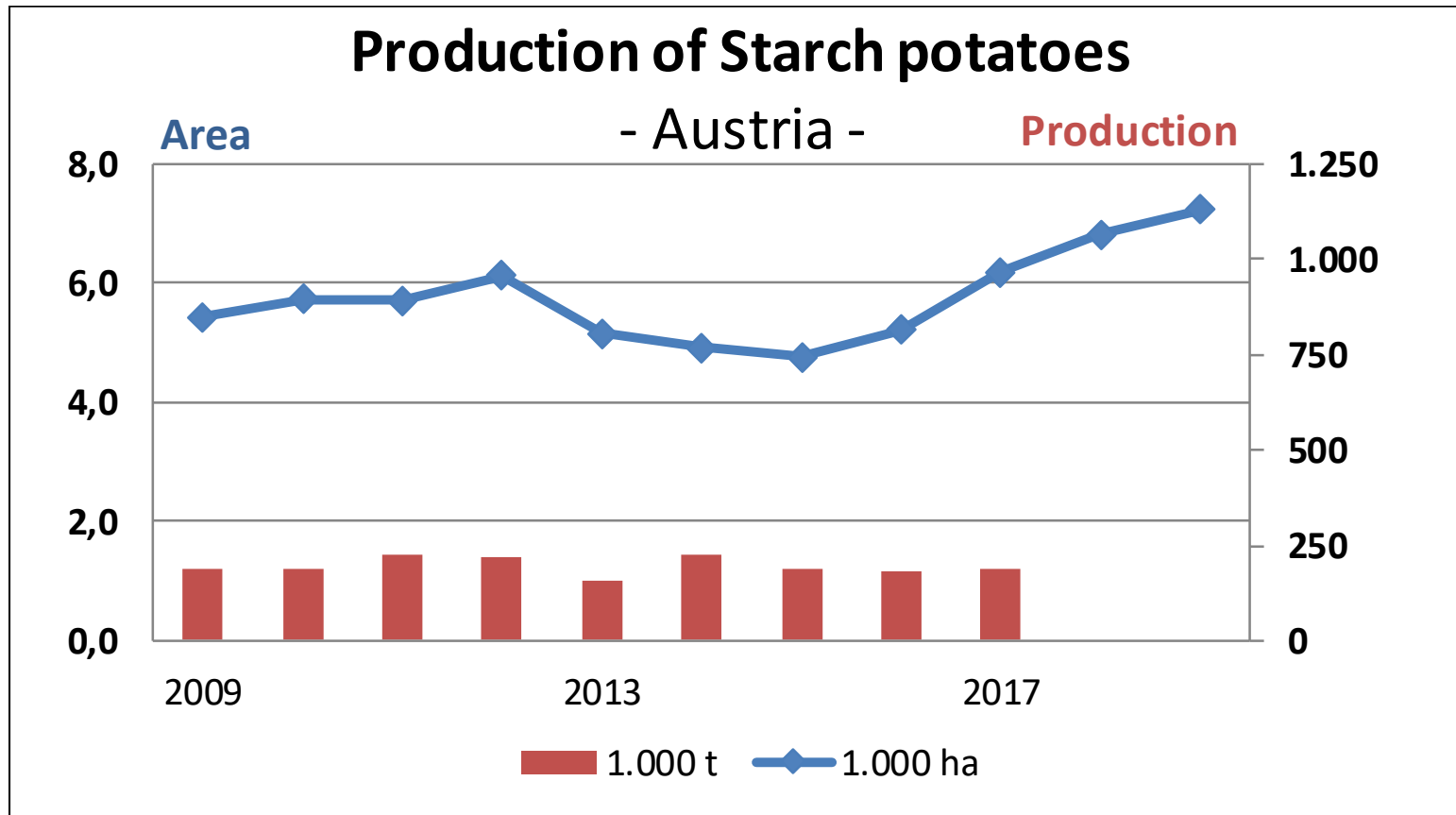
Source:
Statistical Office Denmark /
Danish Potato Association



2019 (p):

- Starch potato area decreased to 6.750 ha (p) (-14%)
- Ware potatoes: 16.300 ha (2018: 15.900 ha)

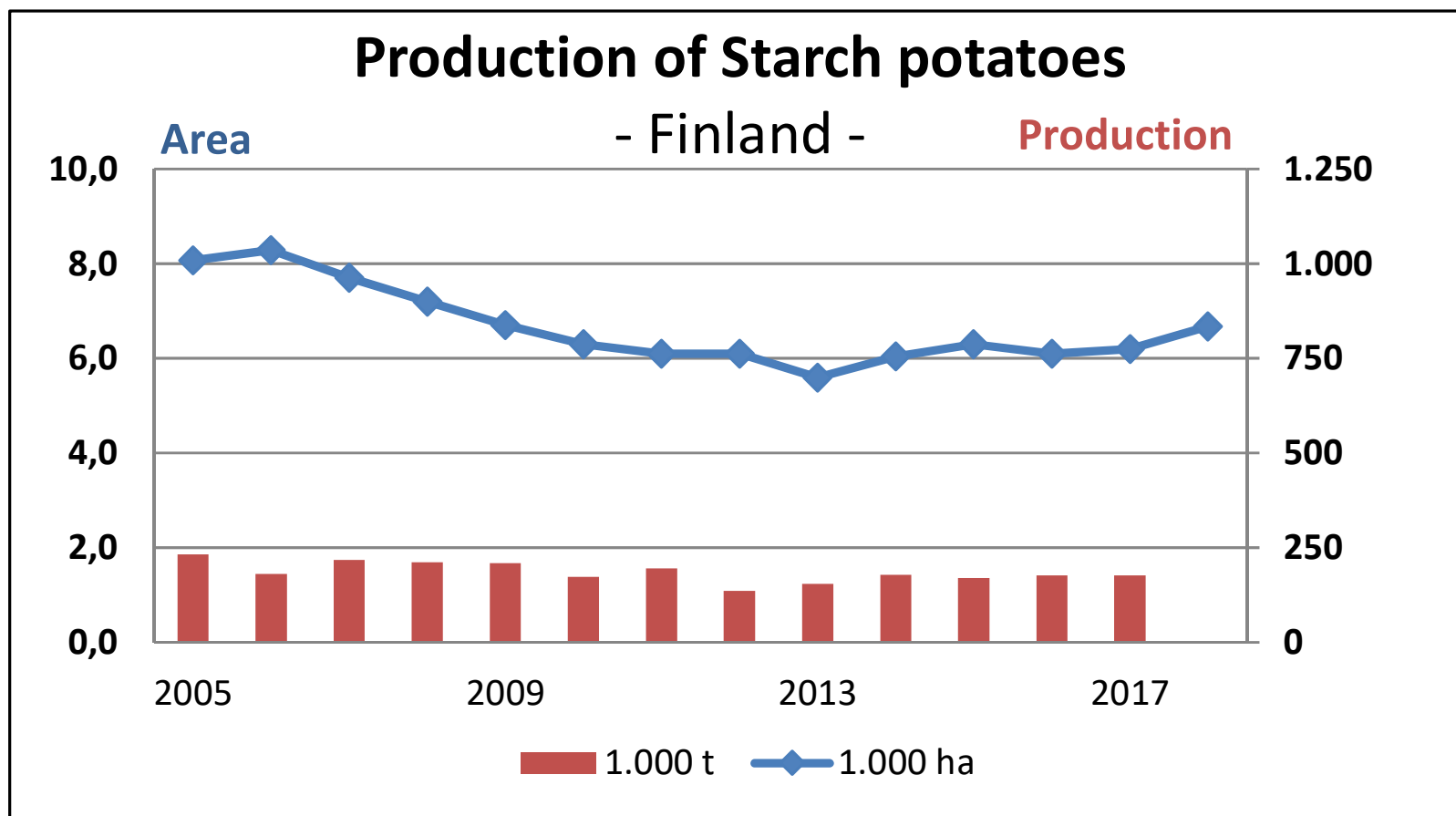
Source:
Swedish Statistical Office,
CESPU



Source:
VÖSK, CESPU

2019 (p):

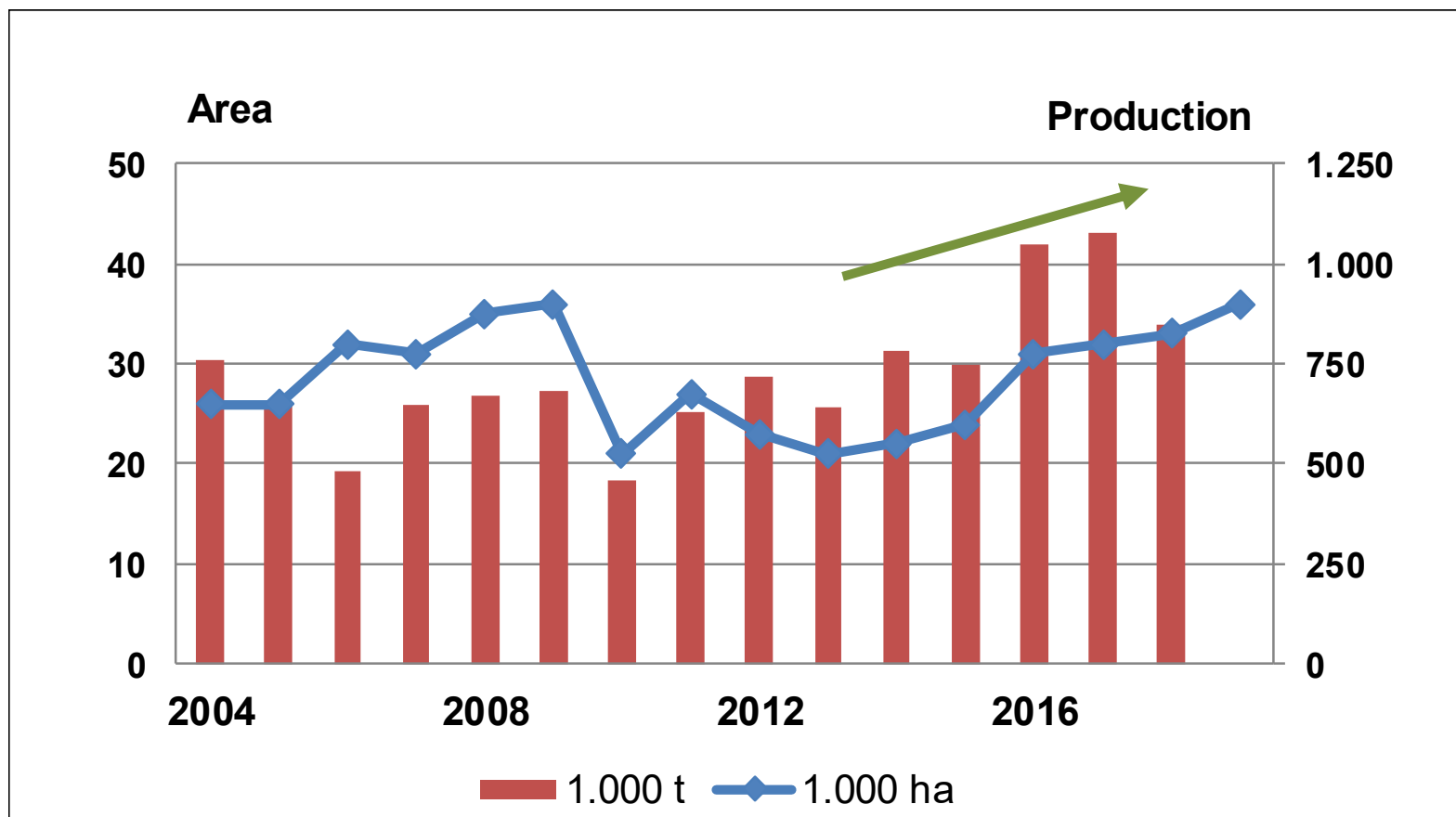
- Further increase to over 7.200 ha (2018: 6.821 ha)
- Processing of additional starch potatoes produced in Czech Republic (about 1.500 ha = ¼ of CZ starch potato area of total 5.929 ha in 2019)



2019 (p)

Source:
MTK, CESPU

➤ 6.750 ha starch potatoes (+167 ha)



Source:
IERiGZ /
BVS

Starch potatoes

- 2018 (p): 33.700 ha
- 2019: further increase announced, but low yields too

Potatoes total:

- 310.000 ha (+ 12.500 ha; + 4,2%),
- 6,7 mio tons (2018: 7,4 mio tons; - 10,9%); high level of imports needed

The main challenges for the future of our sector

- Common Agricultural Policy post 2020
(...Voluntary Coupled Support...)
- Plant protection (legislation)
- Climate change (new breeding techniques)
- Trade affairs

Voluntary Coupled Support

BVS

Volunatry coupled support - starch potatoes

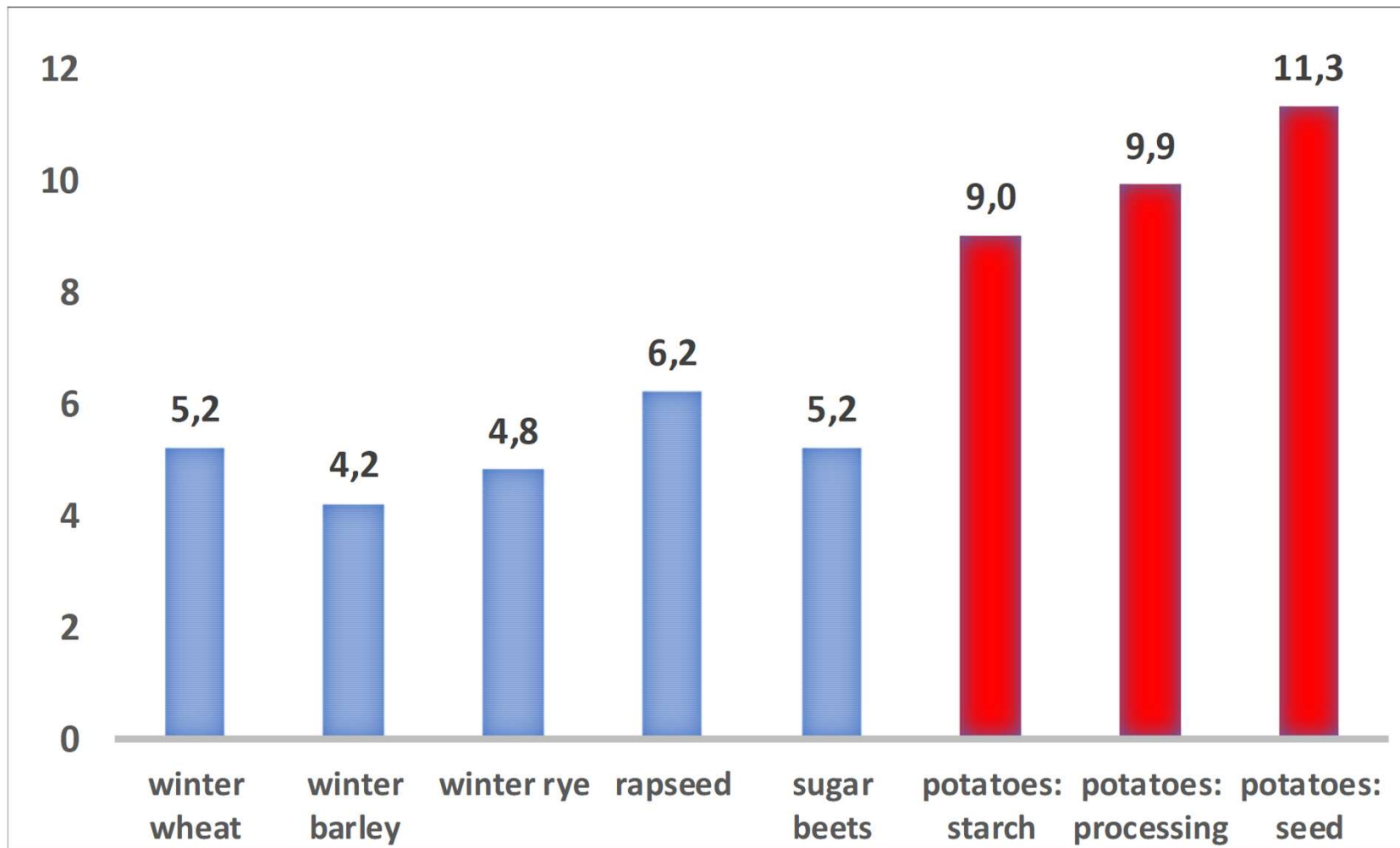
	Supported area		2018/2015	Fixed nr. 2018	Supported/ fixed 2018
	2015	2018			
	ha		%	ha	%
Czech Republic	4.828	5.851	121	4.378	134
France	19.694	23.465	119	23.540	100
Latvia	602	832	138	507	164
Poland	26.254	33.077	126	23.000	144
Finland	6.468	6.640	103	6.720	99
EU-5	57.846	69.865	121	58.145	120
EU-10	187.885	216.664	115	216.664	
Share	31	32		27	

Source:
COM / CESPU

Intensity of plant protection

- number of field crossings per culture: Ø 2008-2017,

Source: Agrar GbR (DE)

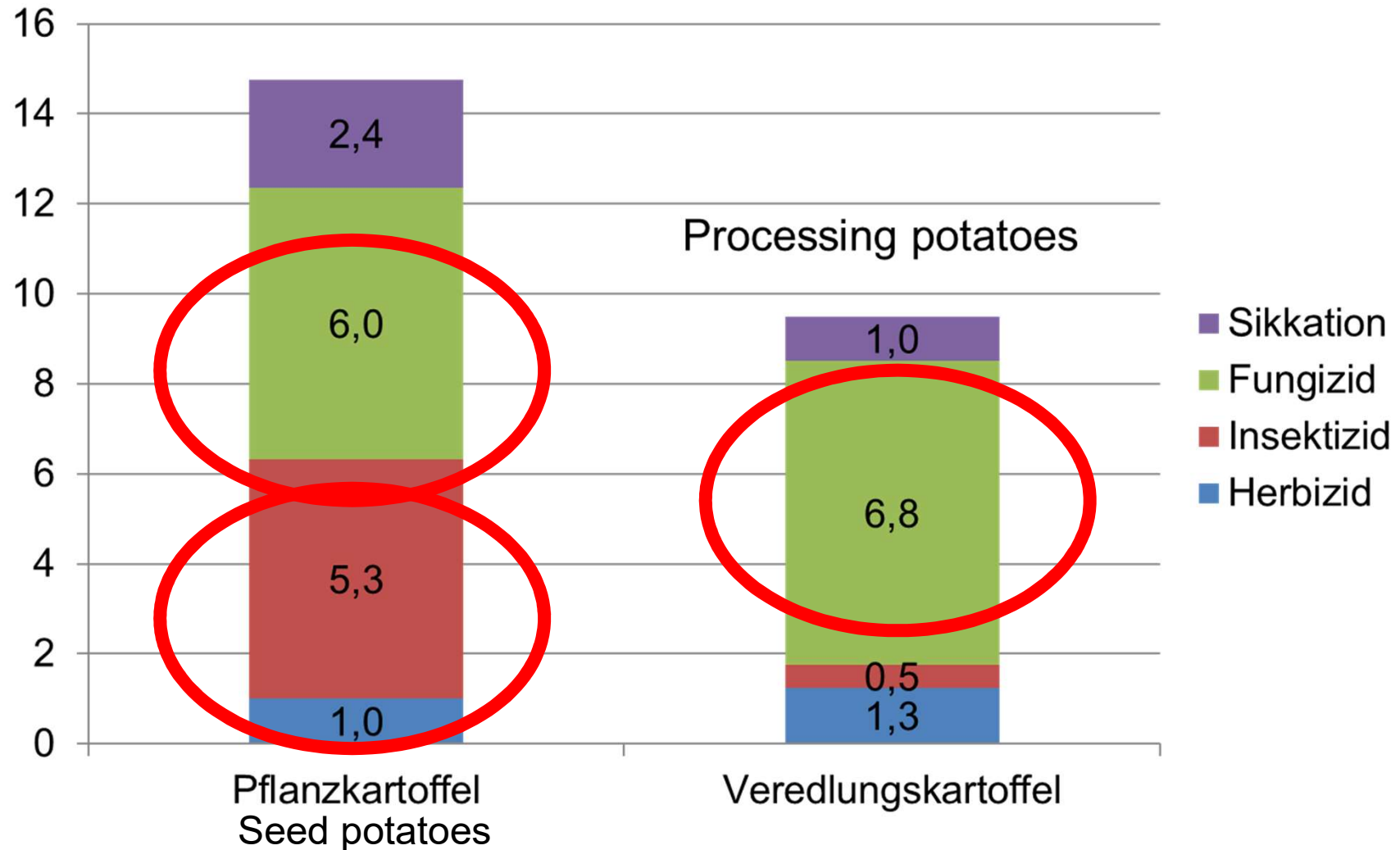


Intensity of plant protection

BVS

- number of field crossings 2017

Source: Agrar GbR (DE)



Situation / estimation on plant protection measures for potatoes - Germany (2018) -

Potatoes for consumption today	Potatoes for consumption tomorrow		Seed potatoes today	Seed potatoes tomorrow
		Seed treatment		
		Herbicide pre-emergence		
		Herbicide post-emergence		
		Colorado potato beetles		
		Ahids (virus)		
		Phytophthora		
		Alternaria		
		Dessication		
		Sprout inhibition		
		Storage treatment		

- Further increase of potato area in EU (processing, starch, seed)
- in many regions (N/W): estimations for yields better than in (disastous) 2018, but not everywhere
- robust potato markets
- heat, drought, rain (autumn): irrigation, problems with quality; increasing costs
- recommendation for 2020: no further increase in area
- The main challenges for the potato sector

Thank you

