



Committee of the European Starch Potato Producers' Unions

Overview of the market situation for (starch) potatoes

CDG Agricultural markets- starch

14 November 2024



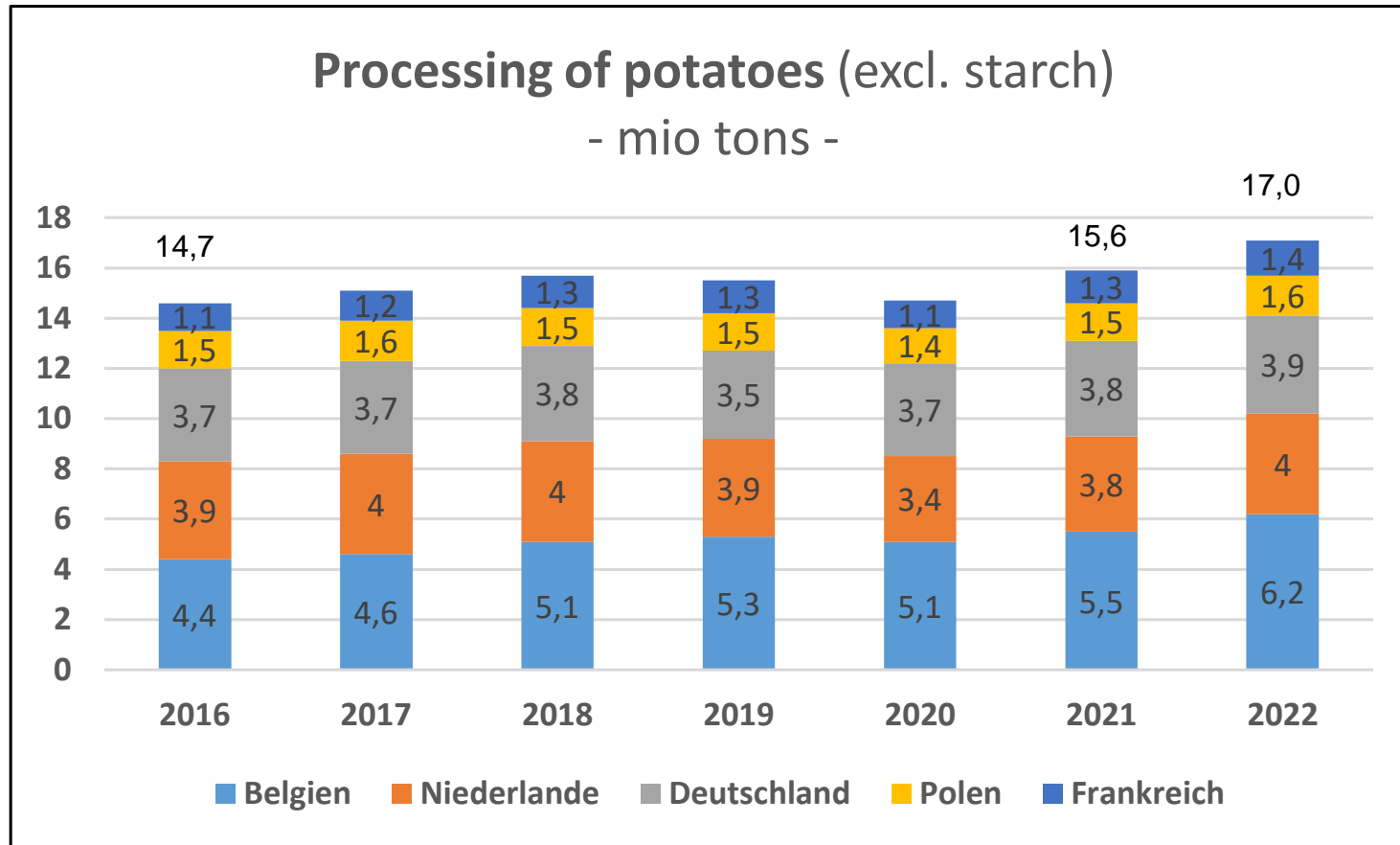
After 2023, 2024 was also a year with very big challenges:

- increasing demand for processing potatoes, but only a medium harvest 2023 has led to unusually high prices
- despite the shortage of seed potatoes with tight market and high prices: expansion of potato cultivation in Central and Western Europe
- extreme weather conditions (heavy rain, flooding)
- extreme pressure from late blight

Predicting developments on the potato markets is becoming increasingly difficult.

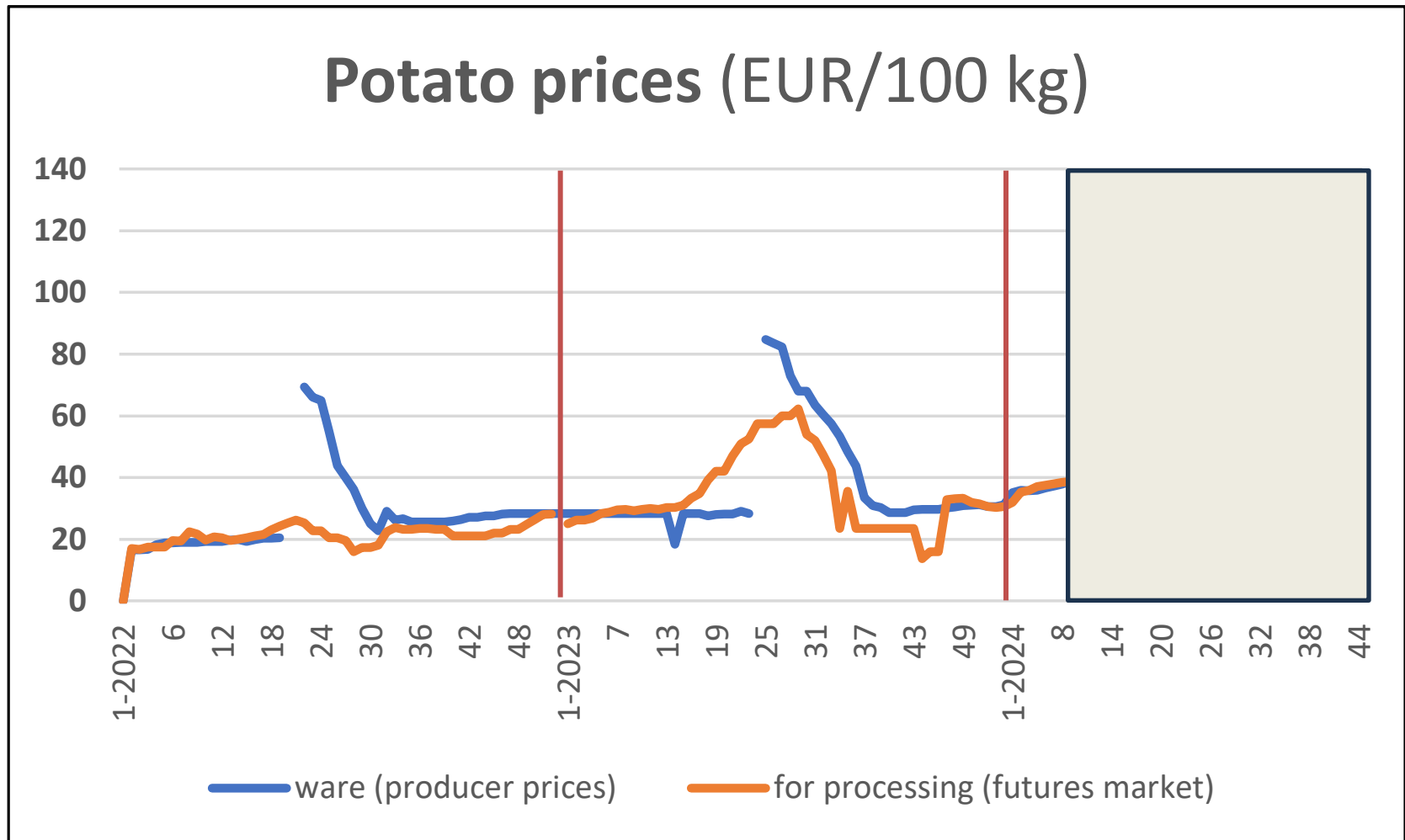
„The weather is the merchant“ (Ferdinand Buffen)

Processing in Europe



Source: AMI

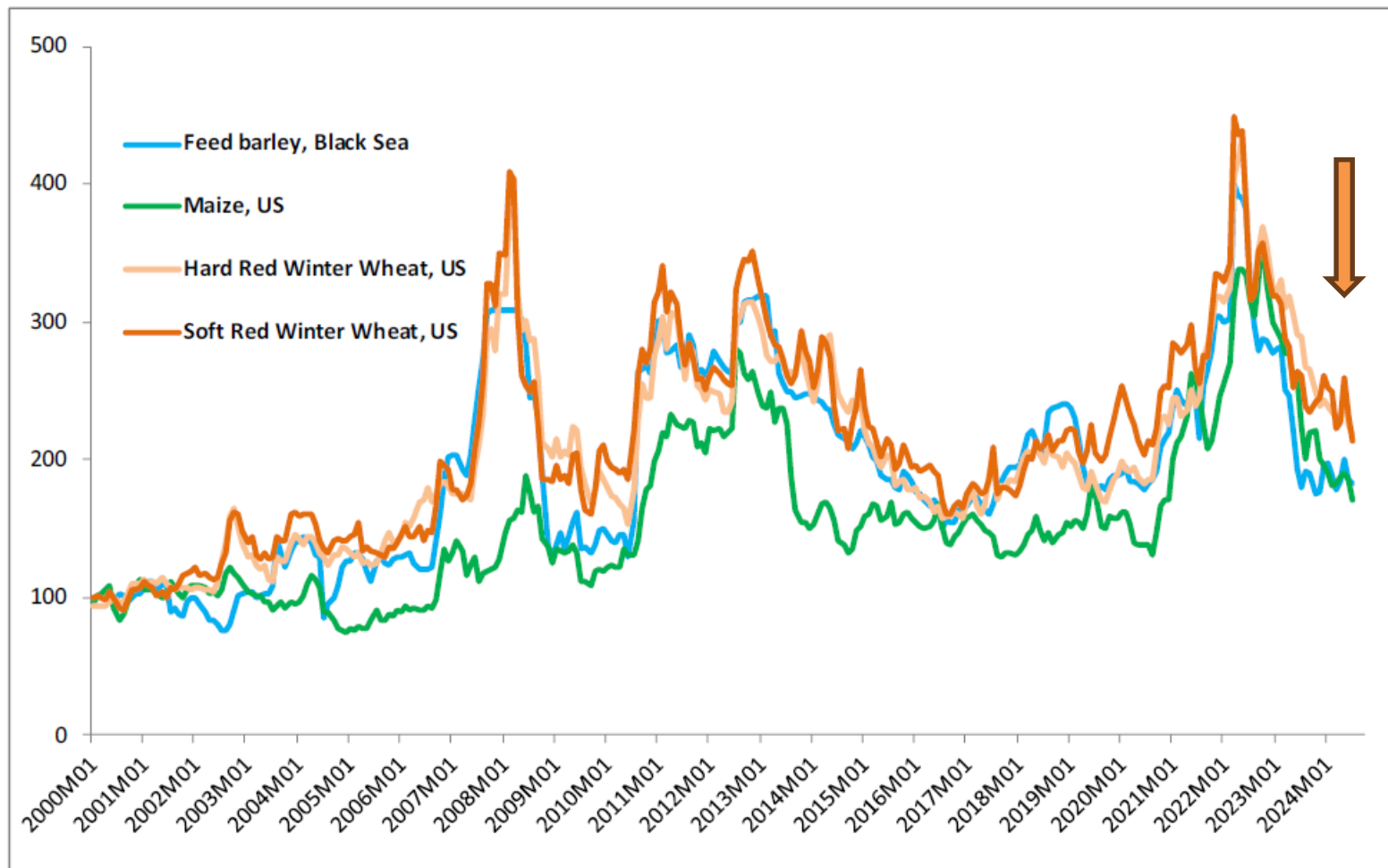
- 2016 - 2022: 14,7 to 17,0 mio tons (= +16%)
BE: 4,4 – 6,2 mio tons (+41%).....7,0 mio tons in 2023 (!)



Remark: Prices for ware potatoes in DE (Source AMI)

Cereals: international price developments

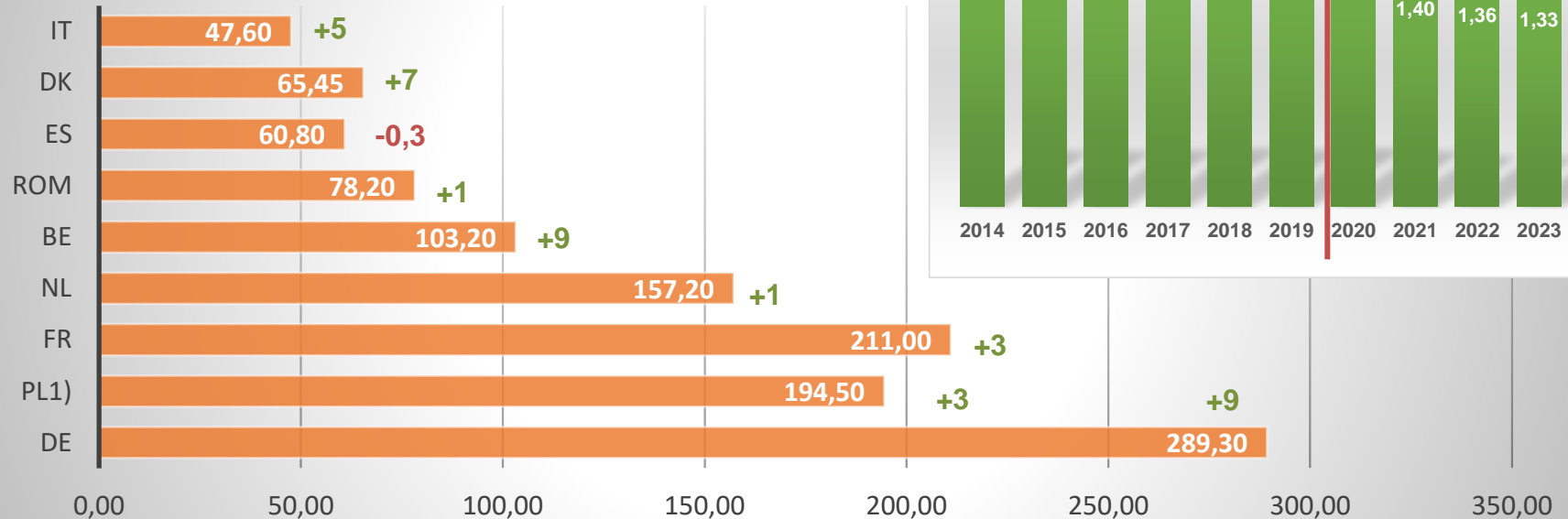
(01/2000 – 09/2024; 2000 = 100, based on USD)



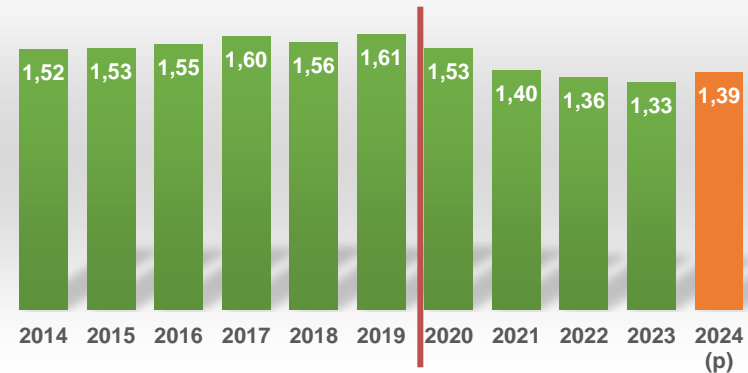
EU Potato area

Potatoes - cultivated area 2024 (p)

- in 1.000 ha -



EU-27 total (mio ha)



p = preliminary.

1) From 2020, Poland revised area by about 75.000 ha.

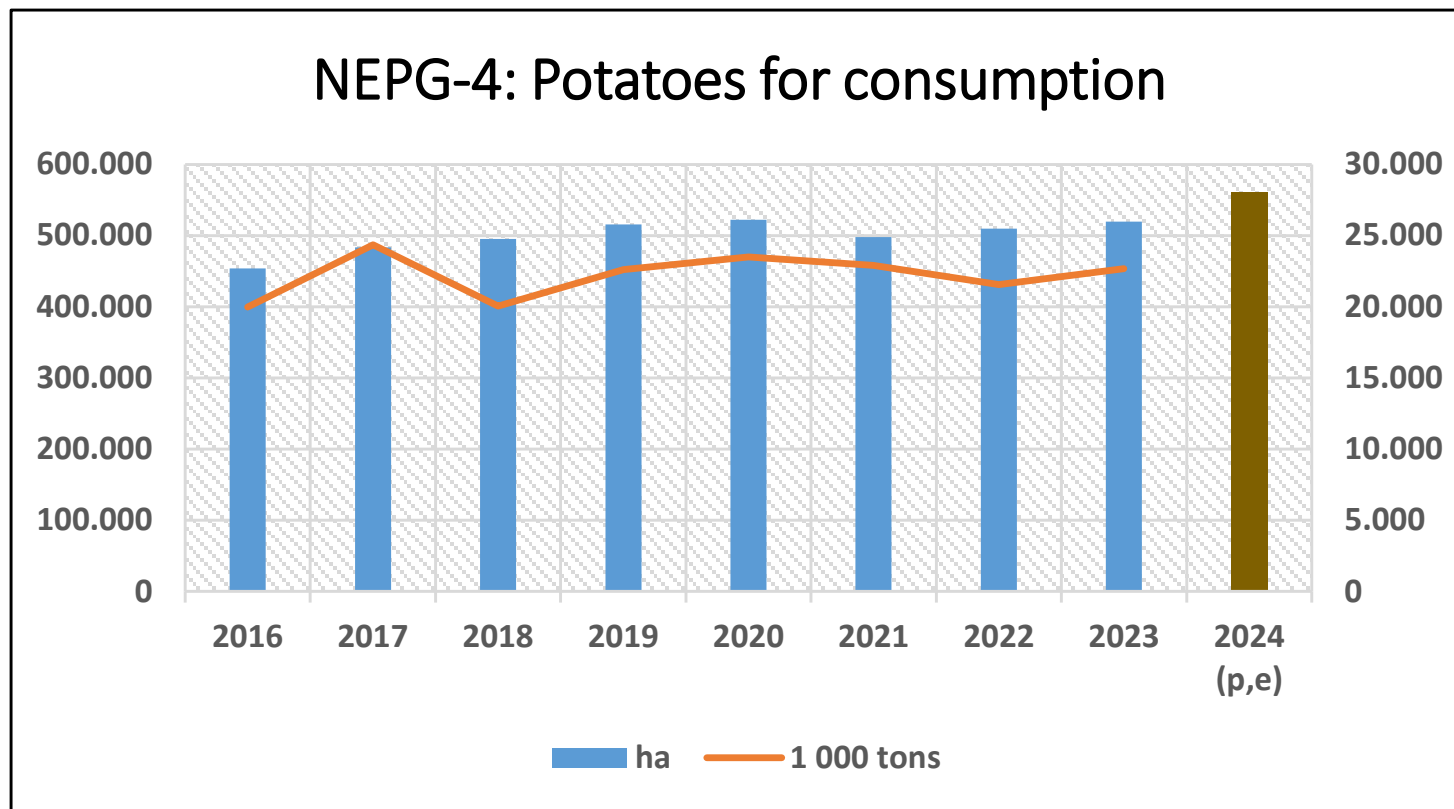
- EU-27 (p/e): 1,39 mio ha
- 2023: 1,33 +4,5%
- 2020-23: 1,41 -1,2%

AND:

- more for processing und seed
- but less starch

Source:
Eurostat/National Statistical Offices

EU-4 - consumption potatoes

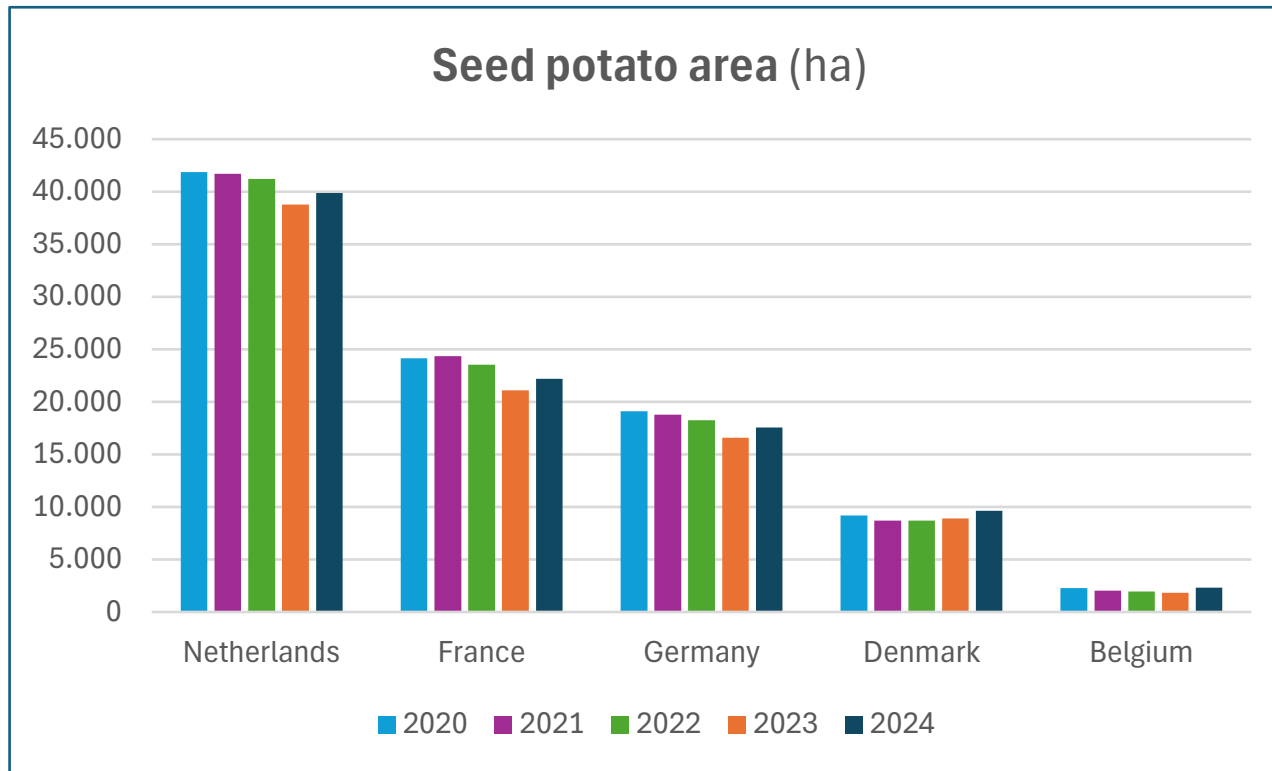


➤ EU-4 2024 : 560.000 ha (+8%)

2023: 22,7 mio tons
2019-23: 22,7 mio tons

Source: NEPG

Seed potatoes



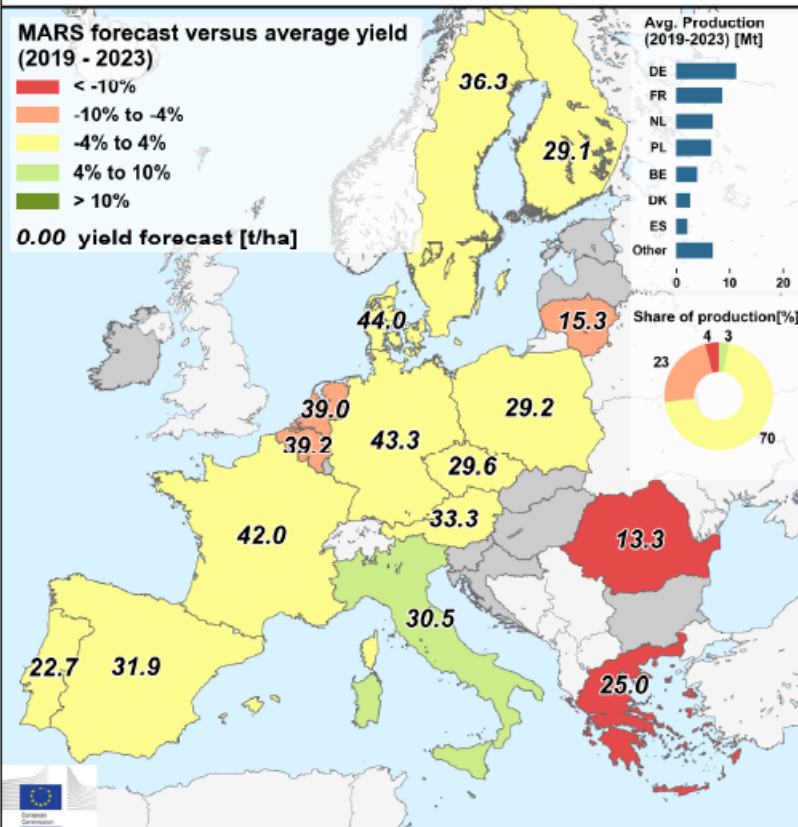
	2020	2021	2022	2023	2024
EU-5	96.597	95.567	93.645	87.166	91.627

Yield forecast

JRC MARS Bulletin Vol. 32 No 10 – 28 October 2024

Country	Potatoes (t/ha)					
	Avg 5 yrs	2023	MARS 2024 forecasts	%24/5yrs	%24/23	% Diff October / September
EU	35.4	36.8	36.0	+ 2	- 2	+ 0
AT	32.7	28.8	33.3	+ 2	+ 15	+ 3
BE	41.4	43.5	39.2	- 5	- 10	+ 0
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	28.7	27.4	29.6	+ 3	+ 8	+ 0
DE	41.9	43.9	43.3	+ 3	- 1	+ 2
DK	43.7	45.1	44.0	+ 1	- 2	+ 0
EE	—	—	—	—	—	—
EL	28.6	27.7	25.0	- 12	- 10	+ 0
ES	32.3	32.0	31.9	- 1	- 0	+ 0
FI	28.9	30.2	29.1	+ 0	- 4	+ 0
FR	41.0	42.2	42.0	+ 3	- 0	+ 0
HR	—	—	—	—	—	—
HU	—	—	—	—	—	—
IE	—	—	—	—	—	—
IT	29.0	27.8	30.5	+ 5	+ 10	+ 0
LT	16.1	18.1	15.3	- 5	- 16	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	42.2	41.8	39.0	- 8	- 7	+ 0
PL	20.0	29.0	29.2	+ 2	- 1	+ 0
PT	23.6	24.2	22.7	- 4	- 6	+ 0
RO	15.6	14.1	13.3	- 15	- 5	- 8
SE	35.8	35.6	36.3	+ 1	+ 2	+ 0
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—

Potatoes - yield forecast 2024

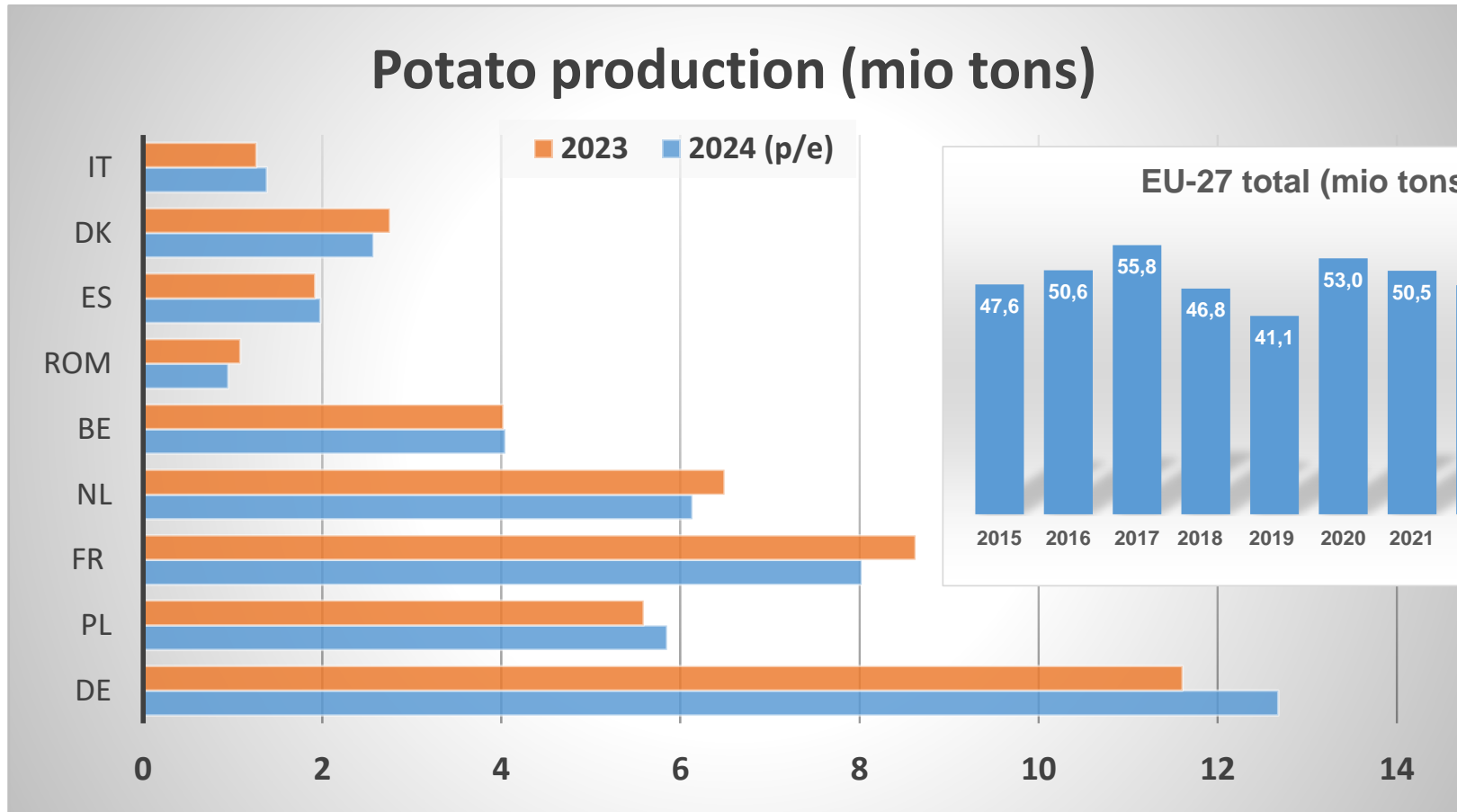


MARS Bulletin Vol. 32 No.10 (2024)

Source: COM

EU Potato production

Source:
Eurostat/National Statistics



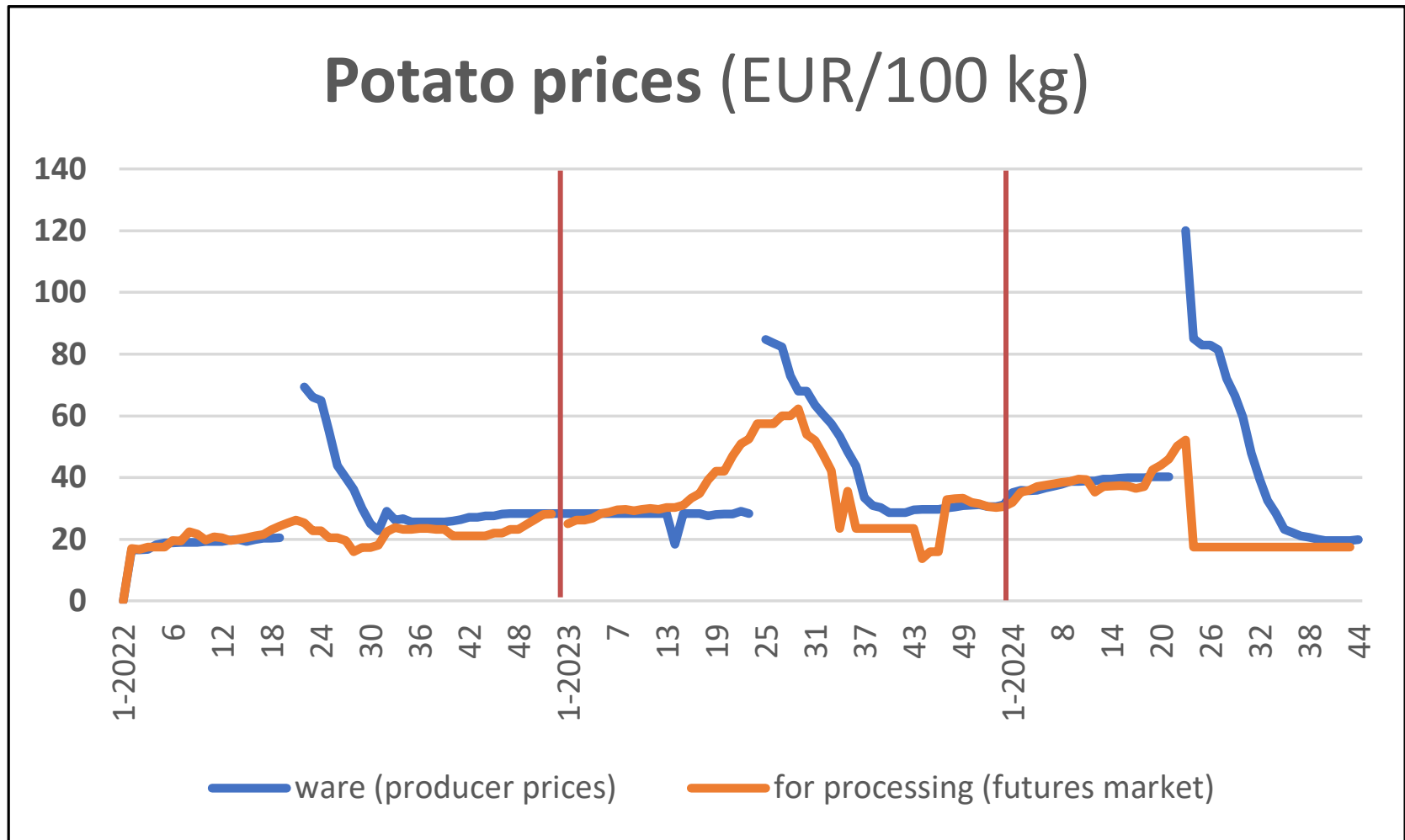
p = preliminary, e = estimation.

- EU-27 2024 (e) (MARS) 50,0 mio tons (1,39 mio ha x 36,0 t/ha) = brutto!
- Eurostat (nat. statistics) 48,7 mio tons
- 2023: 48,1 mio tons
- 2019-23: 49,8 mio tons

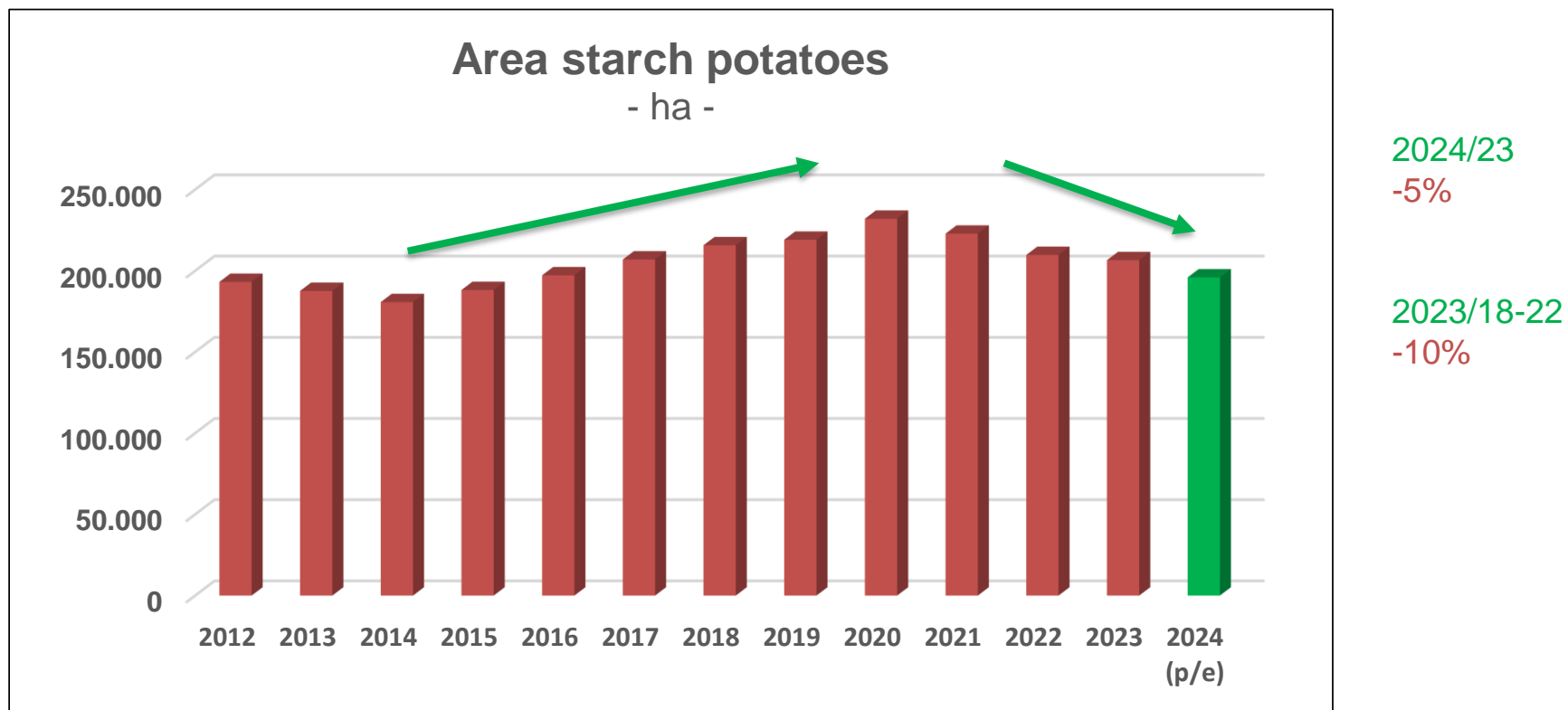
Prices (1st October week)

	2024	2023	2022	2021	2020	2019
Ware potatoes (DE, fresh market)						
Producer prices (EUR/100 kg)	15 - 25	25 - 38	21 - 30	12 – 20	7 – 13	17 – 20
Consumer prices (vf) (EUR/kg)	0,87	1,00	0,90	0,62	0,57	0,72
Potatoes for feeding (EUR/100 kg)	1 - 4	1 - 3	1 - 3	1 - 3	1 - 2	6 – 20
Potatoes for processing (EUR/100 kg)	35+	35/40+	40+	40+	35/40+	40+
Fontane, Innovator etc (BE, NL, DE)	12,50 -18	8 - 12	24 - 25	11,50 - 13	3 – 3,50	10,50 - 11

Euronext Paris (EUR/t)	2024	2023	2022	2021	2020	2019
Wheat, Dec	232,25	235,25	345,00	269,00	198,00	175,00
Maize, Nov	216,25	205,00	337,00	244,00	172,00	164,00
Rapeseed, Nov	481,00	424,50	617,00	676,00	385,00	386,00



Remark: Prices for ware potatoes in DE (Source AMI)



p = preliminary. e = estimations.

Starch potatoes

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024 (v/s)	2024/23 (%)
DE	52.796	52.125	53.523	56.621	57.013	61.555	60.339	58.564	55.930	54.371	97
NL	42.930	43.170	44.040	45.080	44.940	45.104	45.150	43.380	42.583	36.500	86
FR³⁾	21.014	23.215	23.315	24.075	22.404	23.600	23.100	22.223	16.200	10.500	65
DK	22.012	25.543	27.250	28.786	33.270	39.800	34.000	36.500	41.376	43.999	106
FI^{1,3)}	6.468	6.332	6.550	6.640	6.744	6.588	6.404	6.026	5.545	4.599	83
SE⁴⁾	6.455	6.875	7.479	7.923	7.365	7.940	8.781	8.282	7.350	7.850	107
AT	4.766	5.219	6.186	6.821	7.235	6.505	5.959	5.360	5.420	5.086	94
CESPU-7	156.441	162.479	168.343	175.946	178.971	191.092	183.733	180.335	174.404	162.905	93
PL^{2,3)}	26.254	28.973	31.999	33.077	33.723	34.590	32.846	23.543	26.500	27.000	102
CZ³⁾	4.826	5.205	5.882	5.851	5.722	5.541	5.520	5.347	5.054	5.460	108
LV³⁾	602	544	697	832	657	794	752	504	550	530	96
EU-10	188.123	197.201	206.921	215.706	219.073	232.017	222.851	209.729	206.508	195.895	95

p = preliminary. e = estimation. 1) harvested area. 2) By 2014 estimated data. 3) final data for coupled payment of starch potatoes in 2015 – 2022. 4) including seed for starch potatoes.

Source:
CESPU/BVS/European
Commission

Coupled Income Support (CIS) / Voluntary Coupled Support (VCS) for starch potatoes

Coupled Income Support (CIS)

	Applicable quantitative limit (ha)	2023	
Czech Republic	5.588	538	EUR/ha
		3.008	1.000 EUR
France	22.100	84	EUR/ha
		1.856	1.000 EUR
Latvia	786	264	EUR/ha
		207	1.000 EUR
Poland	37.003	245	EUR/ha
		9.081	1.000 EUR
Finland	6.700	550	EUR/ha
		3.685	1.000 EUR
Denmark	39.500	85	EUR/ha
		3.356	1.000 EUR
EU	111.677	190	EUR/ha
		21.194	1.000 EUR

- VCS, final data -

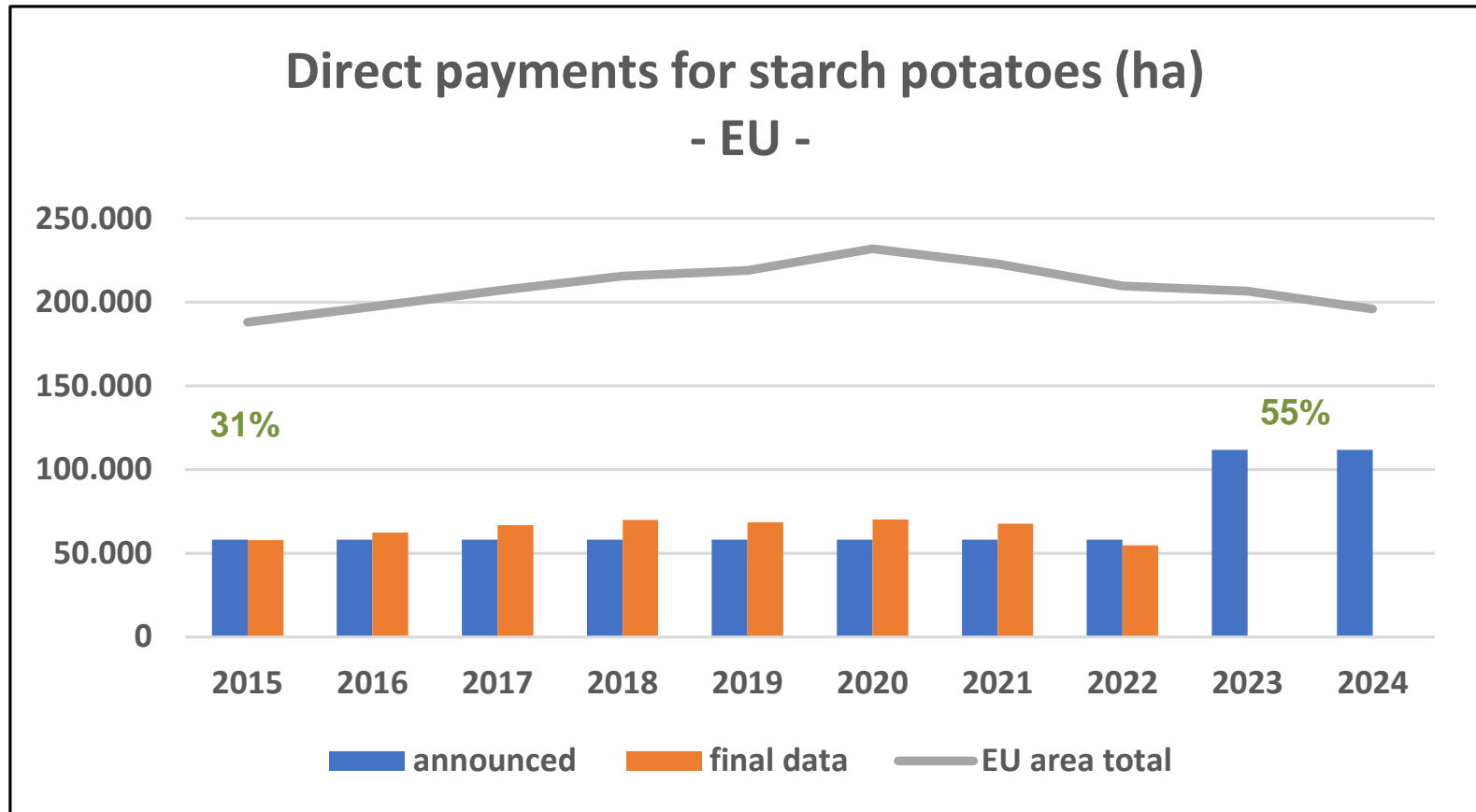
2021	final	Supported area (ha)
535	EUR/ha	5.520
2.951	1.000 EUR	
77	EUR/ha	22.223
1.703	1.000 EUR	
269	EUR/ha	752
202	1.000 EUR	
258	EUR/ha	32.846
8.473	1.000 EUR	
565	EUR/ha	6.404
3.620	1.000 EUR	
250	EUR/ha	67.745
16.950	1.000 EUR	

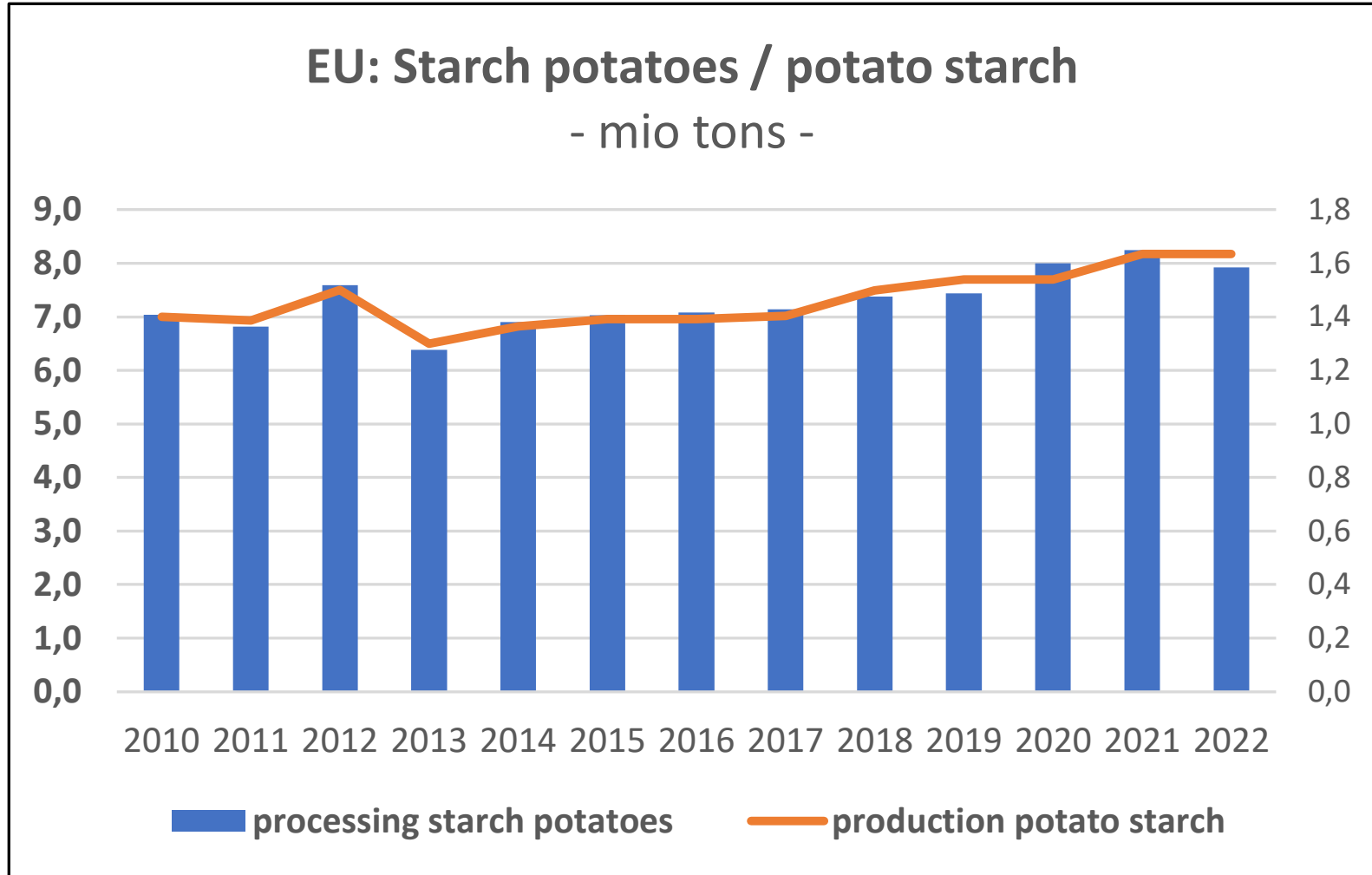
From 2023: direct payments for starch potatoes (ha) on each 2nd ha in the European Union

Source:

CIS: Announcements according to CAP strategic plans.

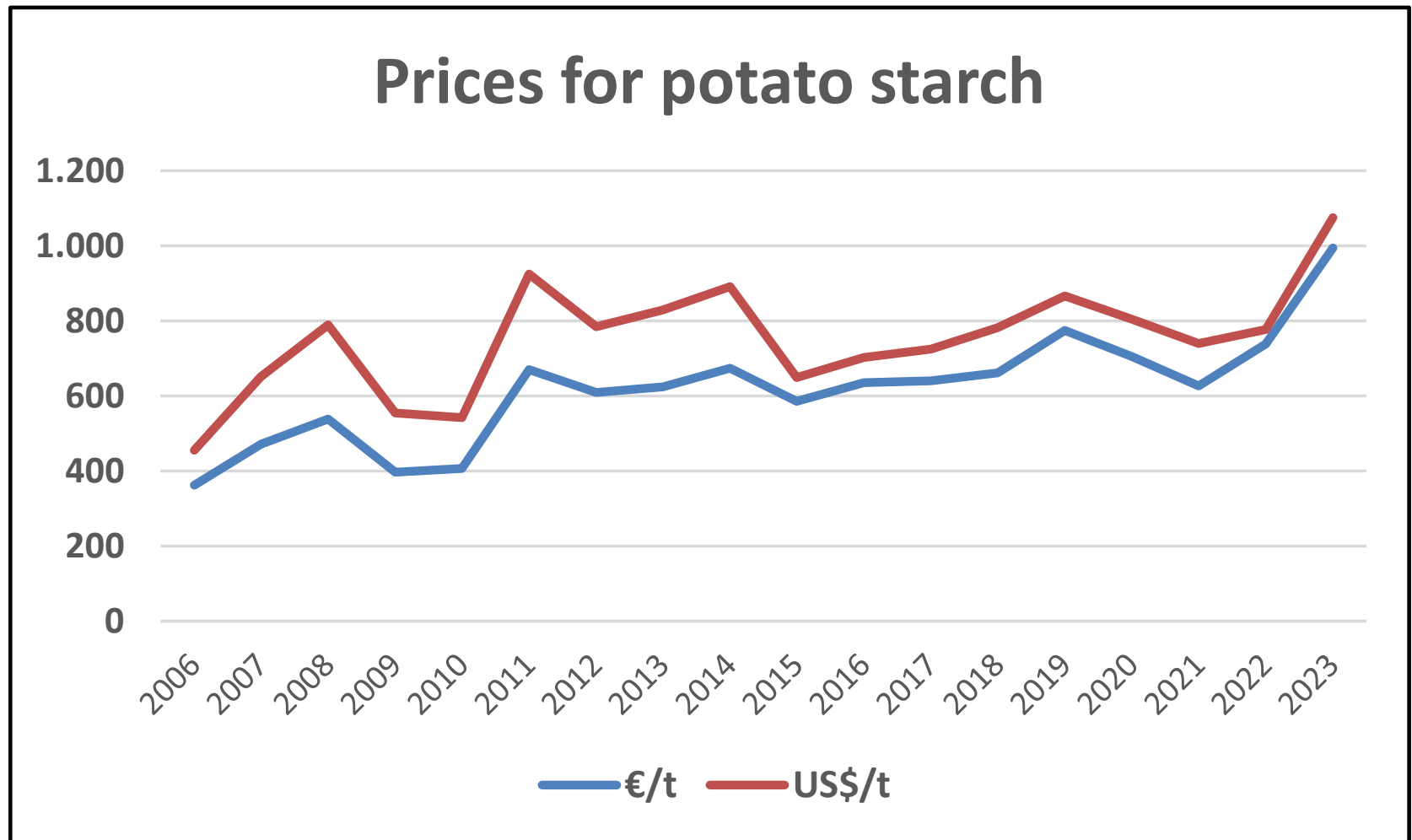
VCS: European Commission





From 2018 including peas to pea starch
Source: Fachverband der Stärke-Industrie/StarchEurope

Potato starch - prices



Source: BVS

- extreme weather conditions cause additional stress for the potato plants
 - fungal diseases (Potato Late Blight!)
 - animal pests (potato beetle, wire worm...)
- new pests and diseases
 - spread of pests and pathogens from southern regions to north
- warm winters hamper the control of volunteers = counteracting the effect of extended crop rotation

Plant protection – a big challenge!

Potato Late Blight (PLB) 2023

Dutch late blight epidemic 2023



Resistances in active substances...

Class (Target Site Code)	Active Substance
B3	Zoxamide
B5	Fluopicolide
C4	Amisulbrom, Cyazofamid
C5	Fluazinam
F4	Propamocarb
F9	Oxathiapiprolin
H5	Mandipropamid, Valifenalate (Dimethomorph, Benthiavalicarb)
M3	Copper, Metiram
unknown	Cymoxanil

resistances already known

...and potato varieties!!!

Potato Late Blight

- PLB epidemic (DK, NL, BE) = great economic loss
- Loss of control tools for integrated crop/pest management (IPM/ICM)
- Integrated control strategies needed to safeguard future of potato
- PLB is a common problem for organic and conventional potato cultivation, joint solutions necessary










COMM(24)0760

Brussels, 28 May 2024

EU Action Plan

EU potato production at risk: a call to combat late blight in potatoes

Introduction

Potato late blight (*Phytophthora infestans*) is the most destructive disease of potato and responsible for the Irish Famine in the 19th century. Annual economic damage in the EU is estimated at around 900 million EUR¹.

The pathogen infects both foliage and tubers and can destroy the complete crop within 1-2 weeks. In addition, the pathogen is highly adaptive and able to quickly develop resistance to fungicides and break resistance genes (R-genes).

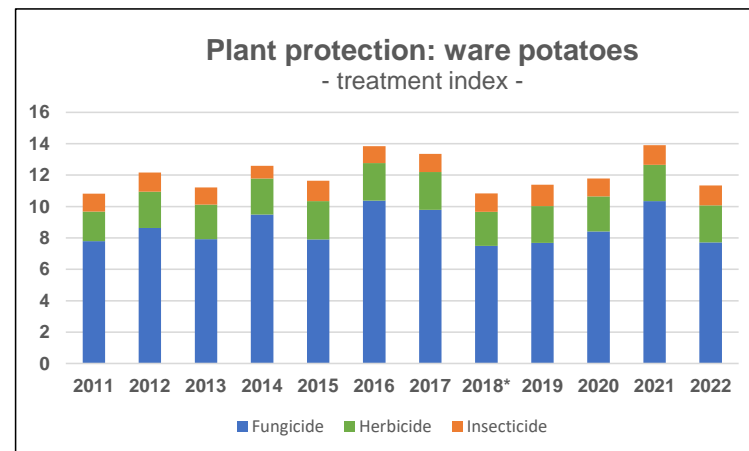
Recently, the pathogen population has been developing more complex virulence spectra (i.e. the ability to break more and more combinations of R-genes) and the development of combined resistance to single-site fungicide active ingredients. These developments are reducing the number of effective control tools, potentially to such a low level that current Integrated Pest Management (IPM) control strategies in the future will no longer be effective².

Forward-looking Integrated Pest Management (IPM) control strategies are feasible by combining the current control strategy with the introduction of more resistant potato varieties, farm management practices against infection and the availability of fungicides with a range of "mode of actions" for both resistance genes and fungicide active ingredients complementing and protecting each other.

Late blight threatens European potato production, the potato supply chain, and the positive EU trade balance³

New and overly aggressive strains of late blight in potatoes (*Phytophthora infestans*) are spreading fast. In addition, they are developing resistance towards the single-site fungicides commonly used for blight control across the EU. Fungicides with a multisite mode of action are no longer available for use by EU potato growers. Currently, resistance has been detected in four out of eleven major fungicide modes of action. As

¹ 'Societal Costs of Late Blight in Potatoes and Prospects of Durable Resistance Through Organic Modification', A. J. Haverson & Co. Potato Research (2022), Published online 28 June 2022.
² 'Development and validation of IPM strategies for the cultivation of cisgenetically modified late blight resistant potatoes', Gerni J. J. Haverson & Co. European Journal of Agronomy, 2018, 100-105.



* from 2018 slightly revised method. Source: Papa panel, JKI/DE

EU Action Plan – a call to combat late blight in potatoes

Potato Late Blight 2024



Suitable management tools are lost without replacment

Candidates for substitution (CfS)		
Insecticides	Herbicides	Fungizides
Bifenthrin	Aclonifen	Copper componends
Dimethoat	Diquat	Difenoconazol
Esfenvalerat	Flufenacet	Famoxadon
Ethoprofos	Glufosinat	Fluopicolide
Fipronil	Metribuzin	Metalaxyl
Lambda-Cyhalothrin		
Metam-		
Oxamyl		
Pirimicarb		
Thiachlopirid		
Cypermethrin		
3/11	4/5	3/5

Remarks: brown: meanwhile forbidden

black: still allowed in Germany

organge: still allowed in EU, but banned in Germany

PFAS (Per- and polyfluoroalkyl substances – the next challenge?

Per- and polyfluoroalkyl substances (PFAS) are a large class of thousands of synthetic chemicals that are used throughout society. However, they are increasingly detected as environmental pollutants and some are linked to negative effects on human health.

PFAS have been frequently observed to contaminate groundwater, surface water and soil. Cleaning up polluted sites is technically difficult and costly. If releases continue, they will continue to accumulate in the environment, drinking water and food. <https://echa.europa.eu/hot-topics/perfluoroalkyl-chemicals-pfas>

Maintaining the plants healthy is

- **an increasing risk and cost factor in potato cultivation**

Plant protection is

- **an even greater challenge to secure potato harvest and thus income for potato farmers!!!**

**Hence,
favourable agricultural
framework conditions
needed!!!**



Committee of the European Starch Potato Producers' Unions

Thank you

