



Committee of the European Starch Potato Producers' Unions

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# **Market situation for (starch) potatoes**



CDG Arable Crops - Starch  
9<sup>th</sup> September 2021

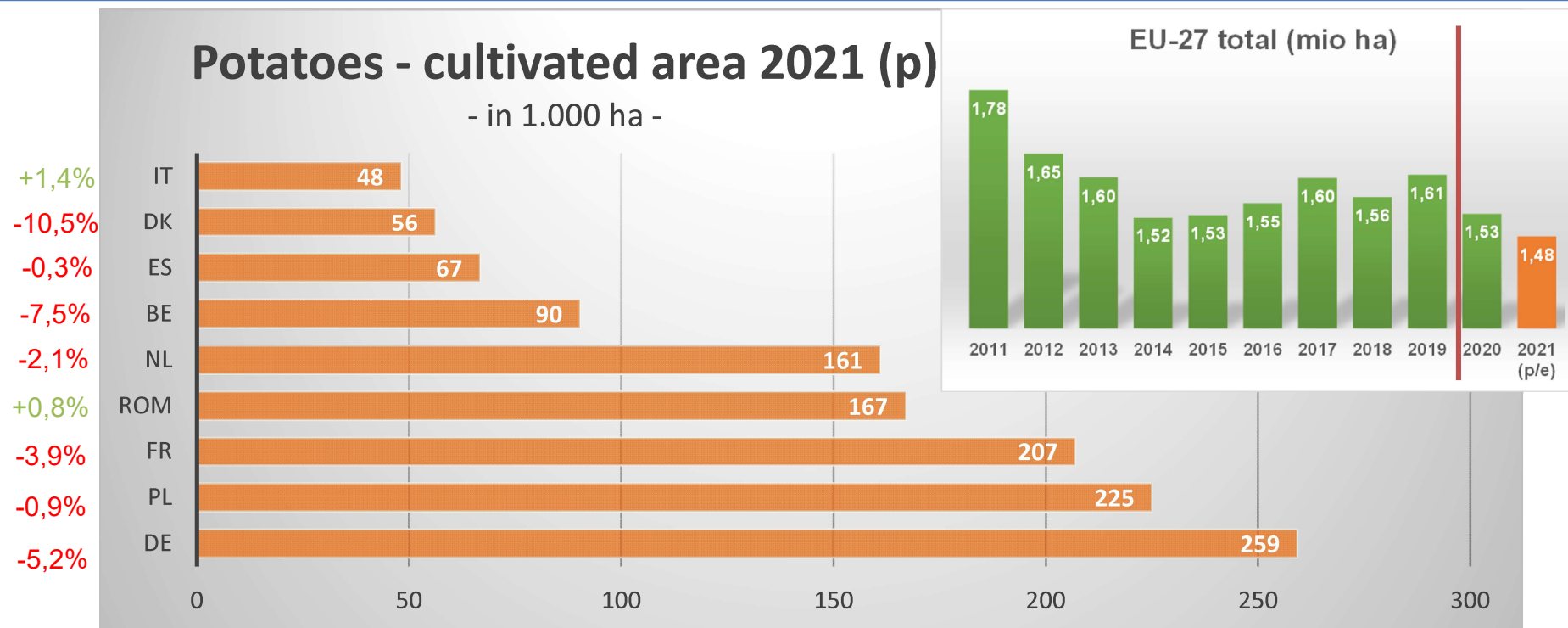
## Season 2019/20

- Covid-19 pandemic: lock downs, social distancing (home schooling / home office / closed restaurants), no events:
  - increasing demand for fresh potatoes
  - slump in sales of potato products: large surpluses of processing potatoes and alternative uses (feed, biogas, starch) needed
  - increasing stocks for potato products

## Season 2020/21

- Average yields on a slightly larger EU potato area
- Low prices for processing potatoes at the beginning, recovering at the end of the campaign
  - since the end of spring, level of potato processing quite normally
- Covid-19: with progress in vaccination public live returns (further requirements and conditions), potato markets are normalizing

# EU Potato area 2021



p = preliminary. e = estimations. From 2020 for Poland revised area by about 100.000 ha.

- EU-27 (p/e): 1,48 mio ha  
 2020: 1,53  
 (2016/20): 1,57  
-3,3%  
-5,7%
  
- BE/DE/DK/FR/NL:  
 2021: 774.000 ha  
 2020: 813.800 ha  
- 39.800 ha / -5%

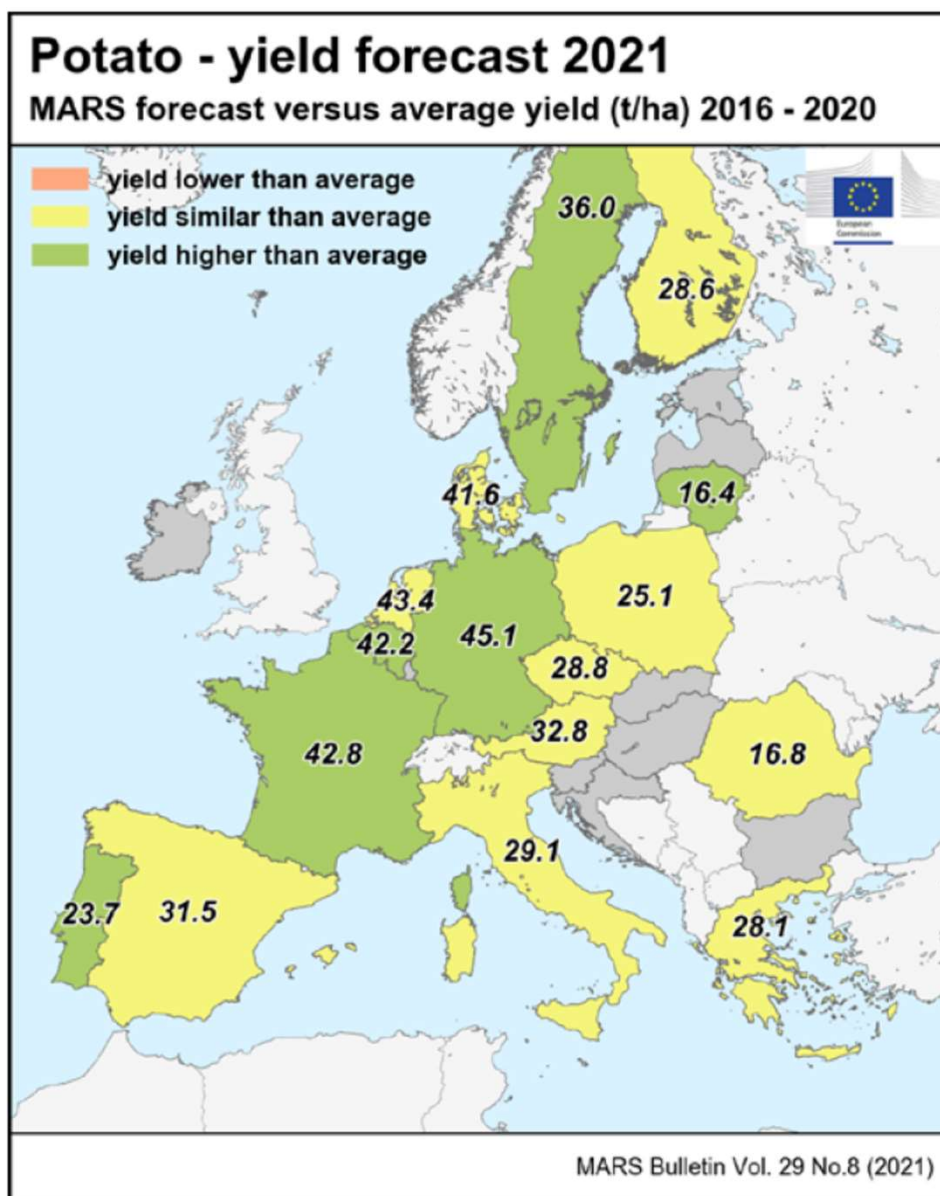
Source:  
Eurostat/National Statistical Offices

## Growing conditions 2021 in the EU

- Early start of plantings, but long planting period in most regions (cold and wet April/May)
- Weather conditions (main growing season), and the associated impact on yield expectations have been quite contrasting; several remarkable weather events (regional drought, heavy precipitation, floodings): climate change
  - Southern, eastern and northern Europe: hot conditions (hotter than usually in Sweden, Finland, Baltic region), regional droughts, heatwaves in July and August
  - Northwestern regions: rainfall cumulated since mid-July, around average in most regions; but also heavy precipitation (with floodings)
- Impact on quality; in central potato regions more problems with potato late blight; suitability for storage
- Increasing costs for phytosanitary measures

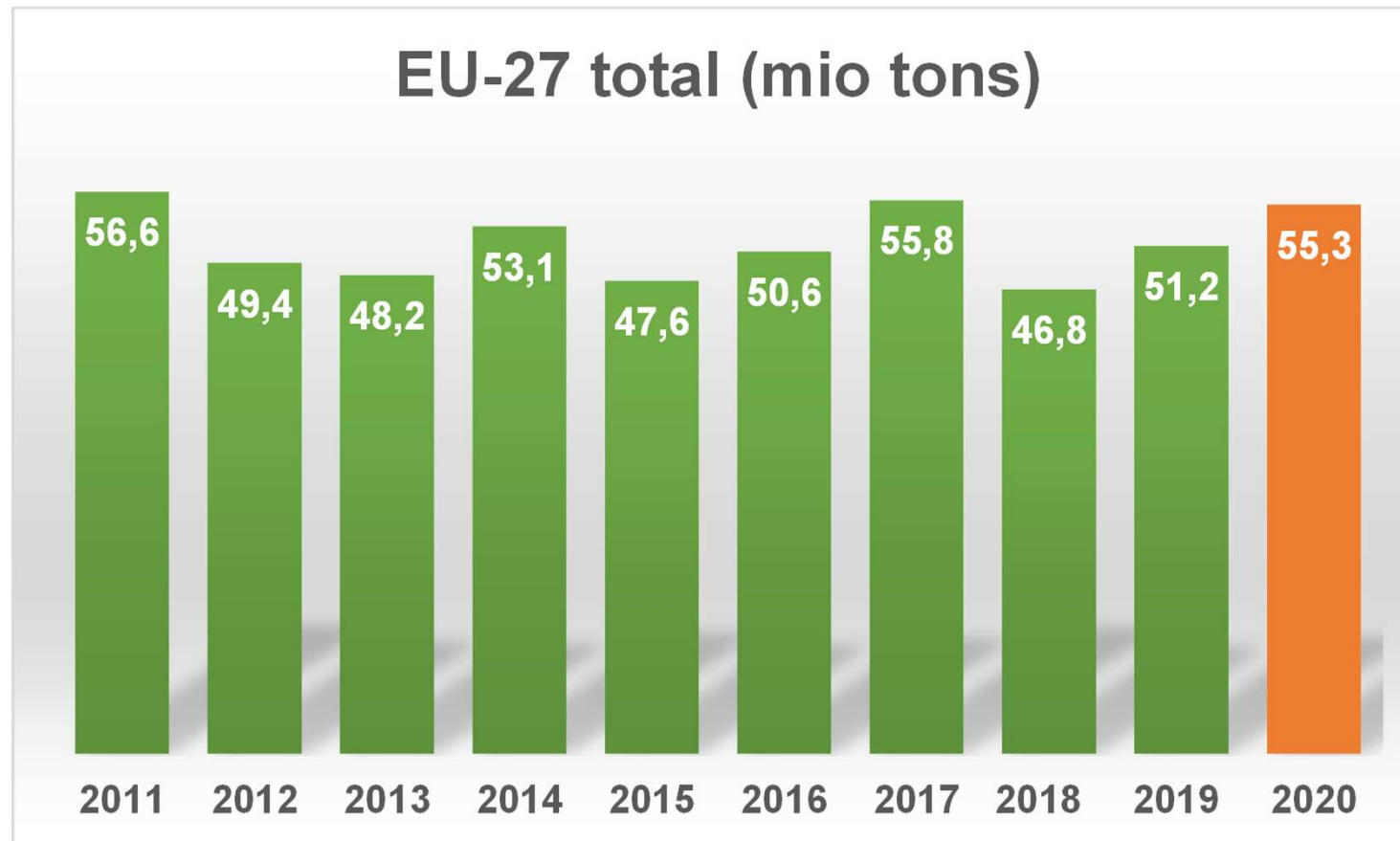
# Yield expectations (snapshot)

COMs Crop monitoring MARS (1 Jul – 15 Aug 2021)



Country	Potato (t/ha)				
	Avg 5yrs	2020	MARS 2021 forecasts	%21/5yrs	%21/20
EU	33.0	33.6	<b>34.8</b>	+ 5.5	+ 3.5
AT	32.3	36.5	<b>32.8</b>	+ 1.4	- 1.0
BE	40.1	40.8	<b>42.2</b>	+ 5.3	+ 3.3
BG	—	—	—	—	—
CY	—	—	—	—	—
CZ	28.3	29.2	<b>28.8</b>	+ 2.0	- 1.2
DE	41.6	42.8	<b>45.1</b>	+ 8.4	+ 5.4
DK	41.6	44.0	<b>41.6</b>	+ 0.2	- 5.4
EE	—	—	—	—	—
EL	28.4	29.9	<b>28.1</b>	- 0.8	- 5.9
ES	31.7	32.0	<b>31.5</b>	- 0.7	- 1.6
FI	28.6	30.2	<b>28.6</b>	+ 0.1	- 5.2
FR	40.9	40.4	<b>42.8</b>	+ 4.9	+ 5.9
HR	—	—	—	—	—
HU	—	—	—	—	—
IE	—	—	—	—	—
IT	29.1	30.3	<b>29.1</b>	+ 0.1	- 4.0
LT	15.5	15.7	<b>16.4</b>	+ 5.6	+ 4.2
LU	—	—	—	—	—
LV	—	—	—	—	—
MT	—	—	—	—	—
NL	42.0	42.7	<b>43.4</b>	+ 3.4	+ 1.8
PL	25.7	25.2	<b>25.1</b>	- 2.0	- 0.4
PT	21.6	23.5	<b>23.7</b>	+ 1.0	+ 1.1
RO	16.2	16.2	<b>16.8</b>	+ 3.4	+ 3.7
SE	34.5	36.3	<b>36.0</b>	+ 4.3	- 0.8
SI	—	—	—	—	—
SK	—	—	—	—	—

# EU Potato production



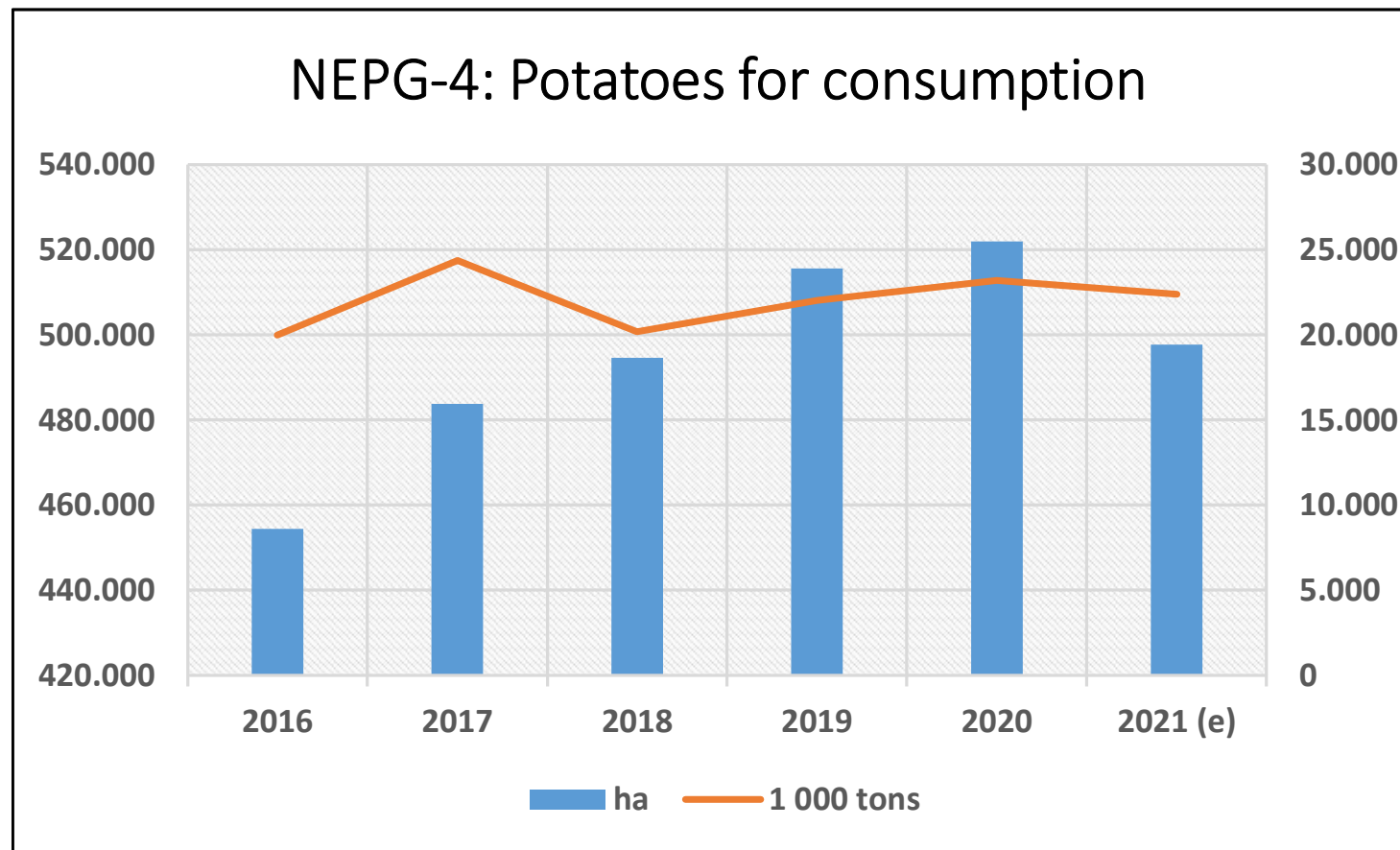
- 2020: 55,3 mio tons
- 2016-20: 51,9 mio tons

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- MARS/COM: 2021: 1,48 mio ha x 34,8 t/ha = 51,5 mio tons (estimation!)  
2020: 1,53 mio ha x 33,6 t/ha = 51,4 mio tons  
2016-20: 1,57 mio ha x 33,0 t/ha = 51,8 mio tons



# NEPG-4 (BE, DE, FR, NL)



Source:  
NEPG/BVS

- 5% (24.300 ha) reduction of cultivated area
- estimated production (3 Sept): 22,4 mio tons, similar to 5 year average

# Prices

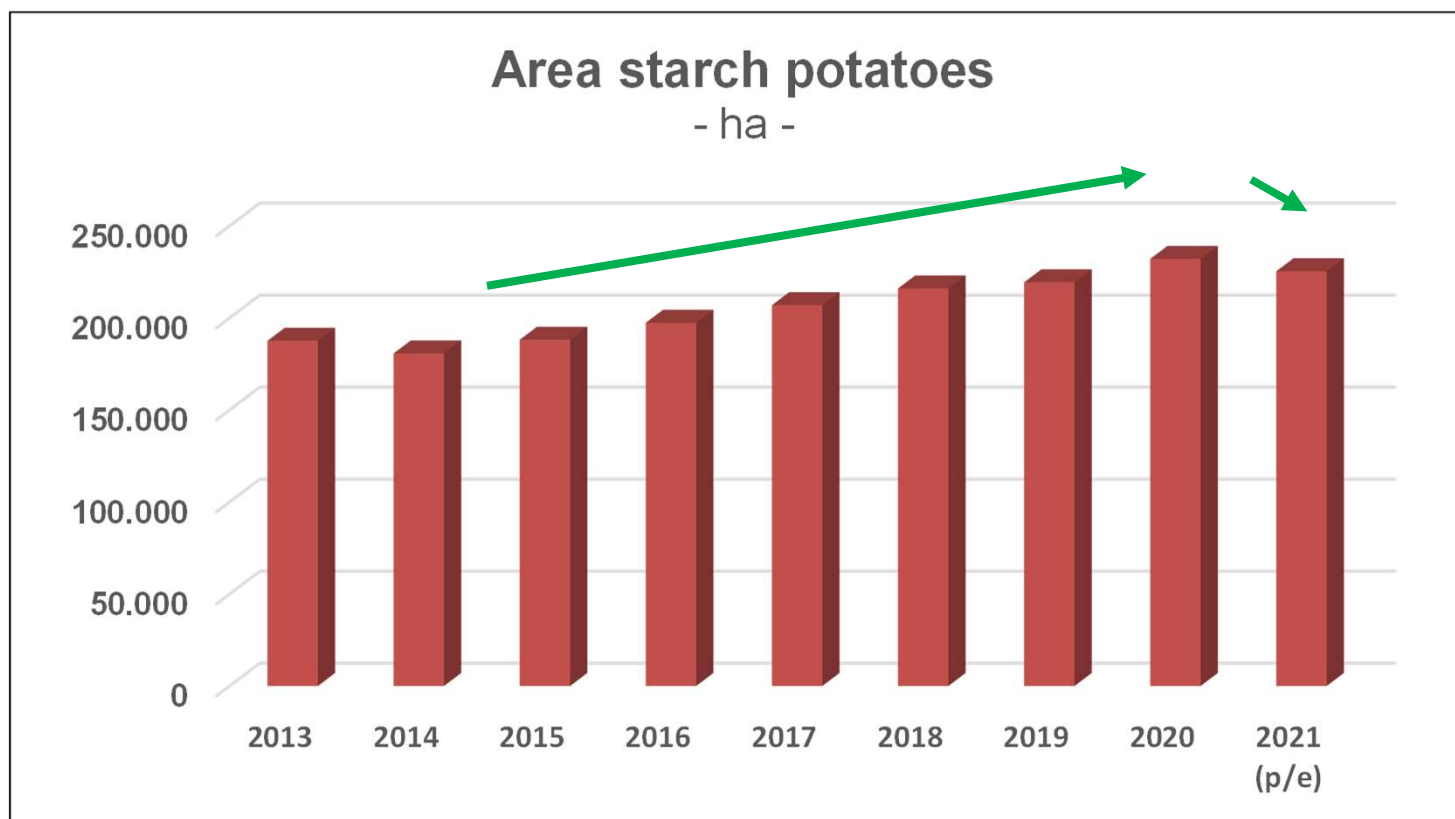
	2021	2020	2019	2018
<b>Ware potatoes</b> (DE, fresh market)				
Producer prices (EUR/100 kg)	16 - 20	10 – 14	19 – 23	22 – 28
Consumer prices (vf) (EUR/kg)	0,98	1,02	1,03	0,94
<b>Potatoes for feeding</b> (EUR/100 kg)				
<b>Processing</b> (EUR/100 kg)	<b>40+</b>	<b>35/40+</b>	<b>40+</b>	<b>35+</b>
Innovator and other (DE)	12,50 - 14	3	10 - 12	23 - 26
Fiwap/PCA	12 – 12,50	2,5 - 3	10	25 – 30
Belgapom Fontane/Challenger	12	2,5 - 3	10	25
Potato NL	13 - 16	-	-	25 - 28

Wheat (Euronext, €/t)                      239                      183    (+30%)

Maize (Euronext, €/t)                      213                      167    (+ 28%)



# EU Starch Potatoes



2021/20  
-3%

2020/16-20  
+5%

	2013	2014	2015	2016	2017	2018	2019	2020	2021 (p/e)
EU-10	187.568	180.691	188.121	197.366	206.921	216.008	219.333	232.060	225.374

p = preliminary. e = estimations.

# EU Starch Potatoes – Area (ha)



	2012	2013	2014	2015	2016	2017	2018	2019	2020 <sup>5)</sup>	2021 (p/e)	2021/20 (%)
<b>DE</b>	64.163	58.487	53.288	52.796	52.125	53.523	56.621	57.013	61.555	60.300	<b>98</b>
<b>NL</b>	43.320	44.030	42.310	42.930	43.170	44.040	45.080	44.940	45.104	45.100	<b>100</b>
<b>FR</b>	20.452	20.222	18.272	21.014	23.215	23.315	24.075	22.404	23.600	23.100	<b>98</b>
<b>DK</b>	19.800	20.400	21.562	22.012	25.543	27.250	28.786	33.270	39.800	34.000	<b>85</b>
<b>FI</b> <sup>1) 3)</sup>	6.003	5.638	6.040	6.468	6.332	6.550	6.640	6.744	6.390	6.441	<b>101</b>
<b>SE</b> <sup>4)</sup>	6.020	6.070	6.141	6.455	6.875	7.479	7.923	7.365	7.940	8.781	<b>111</b>
<b>AT</b>	6.125	5.265	4.901	4.766	5.219	6.186	6.821	7.235	6.505	5.959	<b>92</b>
<b>CESPU-7</b>	<b>165.883</b>	<b>160.112</b>	<b>152.514</b>	<b>156.441</b>	<b>162.479</b>	<b>168.343</b>	<b>175.946</b>	<b>178.971</b>	<b>189.486</b>	<b>183.681</b>	<b>97</b>
<b>PL</b> <sup>2) 3)</sup>	23.000	23.000	23.000	26.254	28.973	31.999	33.077	33.723	35.500	35.500	<b>100</b>
<b>CZ</b> <sup>3)</sup>	3.700	3.985	4.670	4.824	5.370	5.882	6.153	5.982	5.774	5.684	<b>98</b>
<b>LV</b> <sup>3)</sup>	542	471	507	602	544	697	832	657	800	800	<b>100</b>
<b>EU-10</b>	<b>193.125</b>	<b>187.568</b>	<b>180.691</b>	<b>188.121</b>	<b>197.366</b>	<b>206.921</b>	<b>216.008</b>	<b>219.333</b>	<b>232.060</b>	<b>225.665</b>	<b>97</b>

p = preliminary. e = estimation. 1) harvested area. 2) By 2014 estimated data. 3) final data for coupled payment of starch potatoes in 2015 – 2019. 4) including seed for starch potatoes. 5) data partly preliminary

➤ estimations on yields (today): average to less 10%

Source:  
CESPU

# Voluntary Coupled Support – starch potatoes

- Final implementation in the Member States 1) 2)

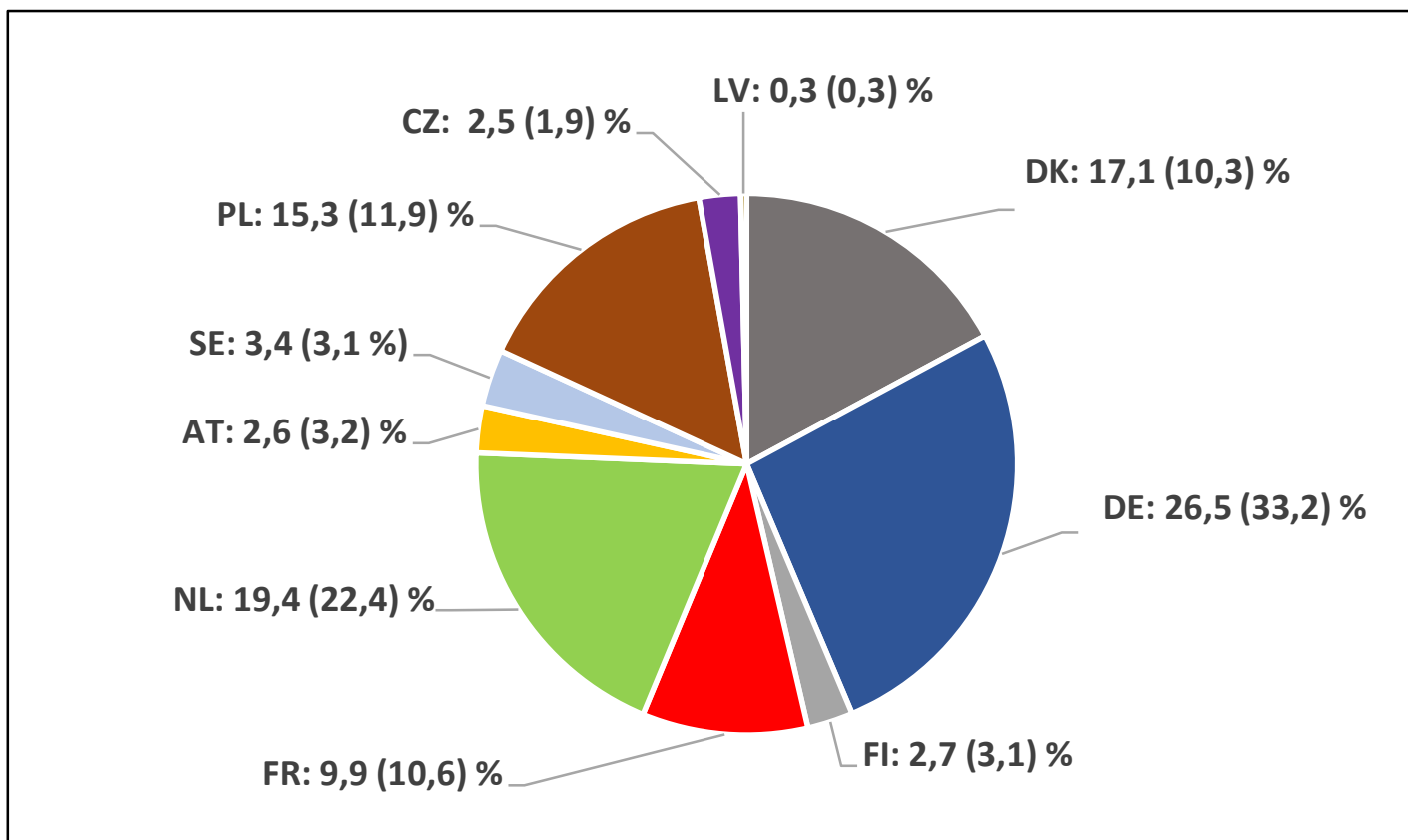


	Claim year	Number of beneficiaries	Supported area ha	Quantitative limit ha	Supported/quantitative limit %	Final amount		Notified amount		Paid / notified %
						1.000 EUR	EUR/ha	1.000 EUR	EUR/ha	
CZ	2015	257	4.826	4.378	110	3.053	633	3.148	719	88
	2016	279	5.205	4.378	119	3.095	595	3.148	719	83
	2017	303	5.882	4.378	134	3.066	521	3.148	719	72
	2018	303	5.851	4.378	134	3.042	520	3.148	719	72
	2019	281	5.722	4.378	131	3.055	534	3.148	719	74
FR	2015	1.185	19.694	23.540	84	1.838	93	1.930	82	113
	2016	1.307	21.228	23.540	90	1.802	85	1.922	82	104
	2017	1.334	21.581	23.540	92	1.771	82	1.909	81	101
	2018	1.470	23.465	23.540	100	1.767	75	1.820	77	97
	2019	1.410	21.670	23.540	92	1.728	80	1.814	77	104
LV	2015	69	602	507	119	206	342	207	409	84
	2016	75	544	507	107	190	350	207	409	86
	2017	91	697	507	137	193	277	207	409	68
	2018	122	832	507	164	197	239	207	408	59
	2019	109	657	507	130	197	300	207	409	73
PL	2015	4.349	26.254	23.000	114	8.502	324	8.664	377	86
	2016	4.556	28.973	23.000	126	8.627	298	8.707	379	79
	2017	4.570	31.999	23.000	139	8.521	266	8.749	380	70
	2018	4.436	33.077	23.000	144	8.107	245	8.749	380	64
	2019	4.222	33.723	23.000	147	8.424	250	8.749	380	66
FI	2015	416	6.468	6.720	96	3.624	560	3.700	551	102
	2016	409	6.332	6.720	94	3.627	573	3.700	551	104
	2017	407	6.550	6.720	97	3.636	555	3.700	551	101
	2018	403	6.640	6.720	99	3.627	546	3.700	551	99
	2019	399	6.744	6.720	100	3.623	537	3.700	551	98
EU	2015	6.276	57.844	58.145	99	17.223	298	17.649	304	98
	2016	6.626	62.282	58.145	107	17.341	278	17.684	304	92
	2017	6.705	66.709	58.145	115	17.188	258	17.714	305	85
	2018	6.734	69.865	58.145	120	16.743	240	17.624	303	79
	2019	6.421	68.516	58.145	118	17.027	249	17.618	303	82

1) Notifications taken by the Member States according to Regulation (EU) No 1307/2013, Delegated Regulation (EU) No 2016/141 and Regulation (EU) No 2017/2393. 2) final Data. Source European Commission

2) finale Daten

## Share by MS in 2020 (2012)



Source: CESPU

# Voluntary Coupled Support – other potatoes



## Potatoes

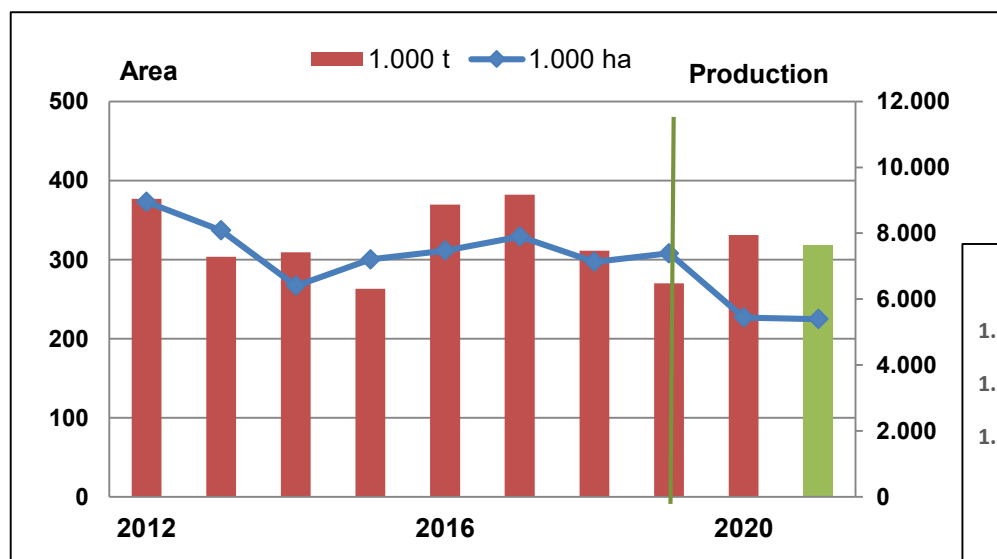
	Applicable quantitative limit (ha)		2017	2018	2019	From 2020
Bulgaria <sup>2)</sup>	18.124	EUR/ha			481	538
		mio EUR			8,72	9,75
Czech Republic <sup>3)</sup>	20.481	EUR/ha	90	90	90	90
		mio EUR	1,85	1,85	1,85	1,85
Romania <sup>4)</sup>	2015-2018: 22.500	EUR/ha	216	219	152	153
	2019+2020: 32.900	mio EUR	4,86	4,93	5,00	5,03

## Seed potatoes

	Applicable quantitative limit (ha)		2017	2018	2019	From 2020
Latvia	317	EUR/ha	505	505	505	505
		1.000 EUR	160	160	160	160
Lithuania	296	EUR/ha	202	213	209	224
		1.000 EUR	60	63	62	66
Romania	2015-2018: 840	EUR/ha	980	990	1.368	1.375
	2019+2020: 614	1.000 EUR	823	832	840	844

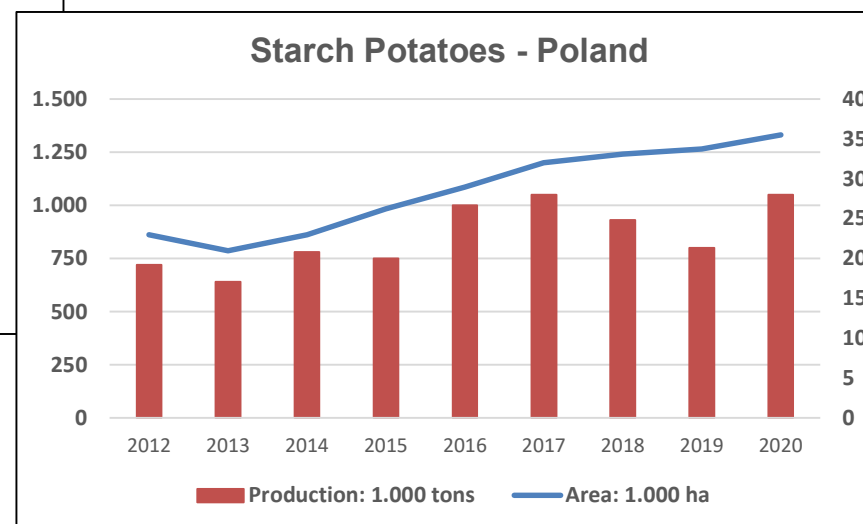
1) Notifications taken by the Member States according to Regulation (EU) No. 1307/2013, Delegated Regulation (EU) No. 639/2014, Delegated Regulation (EU) No. 2016/141 and Regulation (EU) No. 2017/2393. 2) Potatoes, onions and garlic. 3) Ware potatoes. 4) Early potatoes. Source: EU COM

# Poland: Potatoes



Source:  
CSO/IERiGZ

thereof:



Potatoes total 2021:

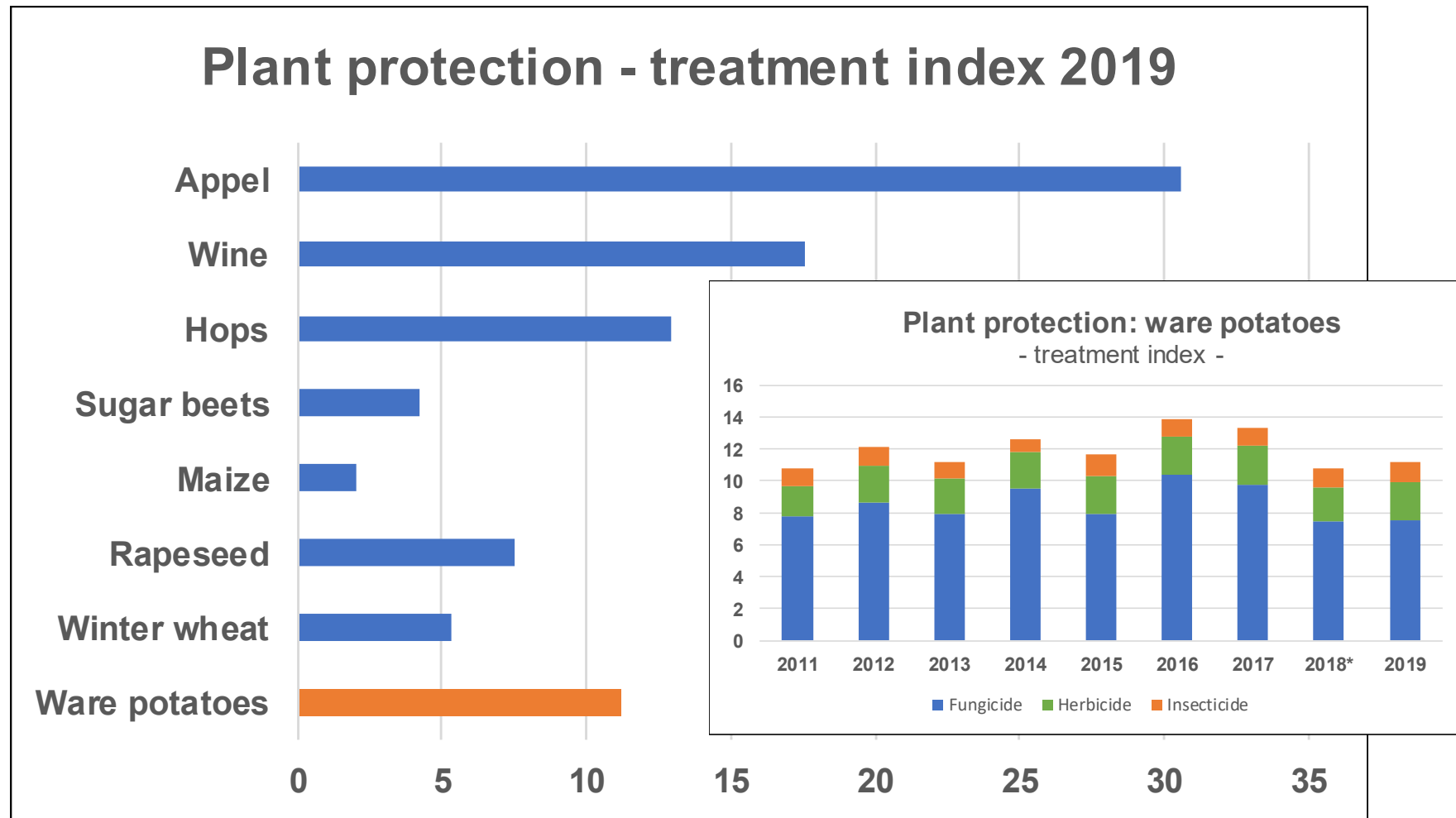
- ha: 225.000 (2020: 227.000; old: 322.000):  
(correction of previous long-term incorrect estimates, which overestimated the area and greatly underestimated the yields).

- 7,65 mio tons (2020: 7,94 mio tons; - 3,7%)

Starch potatoes

- 2021: 35.500 ha (estimation)
- 2020: 35.500 ha (estimation) and 33.723 ha in 2019 (final data, coupled payments)

# Plant protection – A big challenge!



Farm to Fork / Biodiversity:

Reduction of chemical pesticide use by 50% by 2030 is a big challenge to produce potato qualities and quantities the consumer / industry demands.



Increasing costs to produce potatoes and potato products

Green Deal

To stay a reliable supplier in the region for high quality potatoes, farmer need

- adequate potato prices
- suitable production measures (mechanization, plant protection measures, resilient potato varieties...)
- level playing field

- after disturbances in 2020, potato markets are normalizing
- 2021: reduce of potato area in EU, average yields or less estimated (main harvest and storing at the beginning!)
- qualities
- potato markets more balanced in all segments
- increasing costs (plant health, storing, processing, trade, machinery and equipment)
- appreciation, adequate conditions of productions as well as prices needed

# CESPU

Committee of the European Starch Potato Producers' Unions

Thank you

