

CDG Meeting Starch

15 September 2017

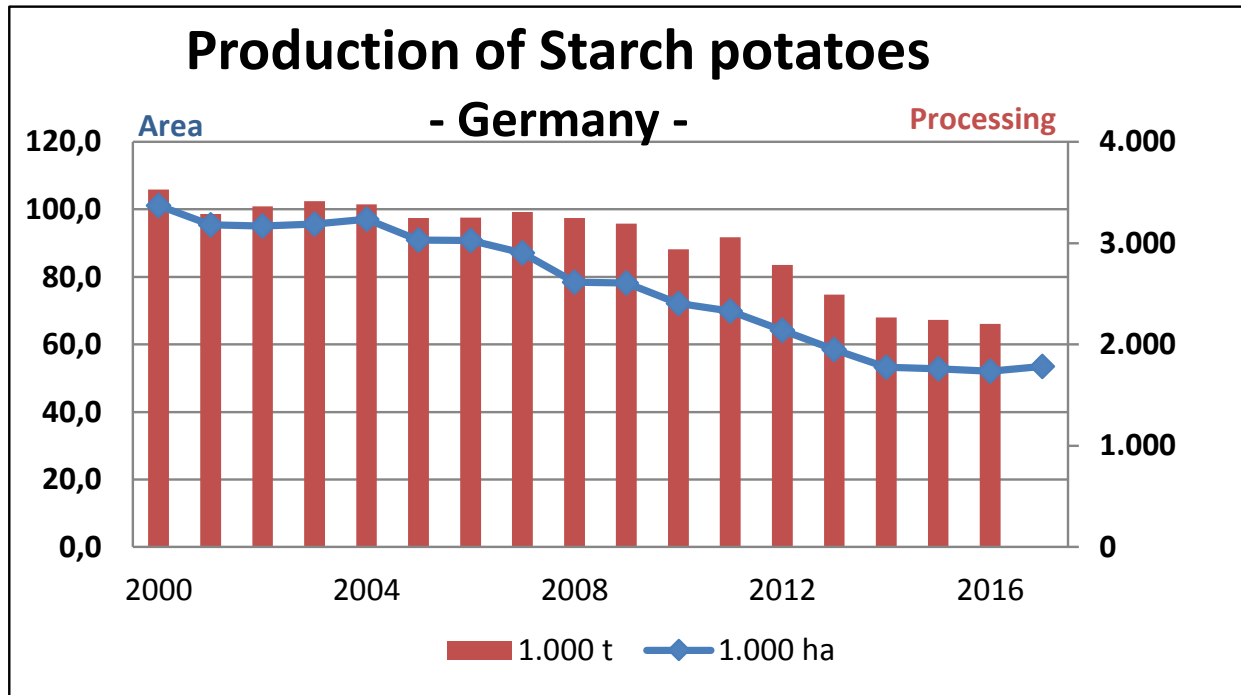
Brussels



Agenda

Market Situation

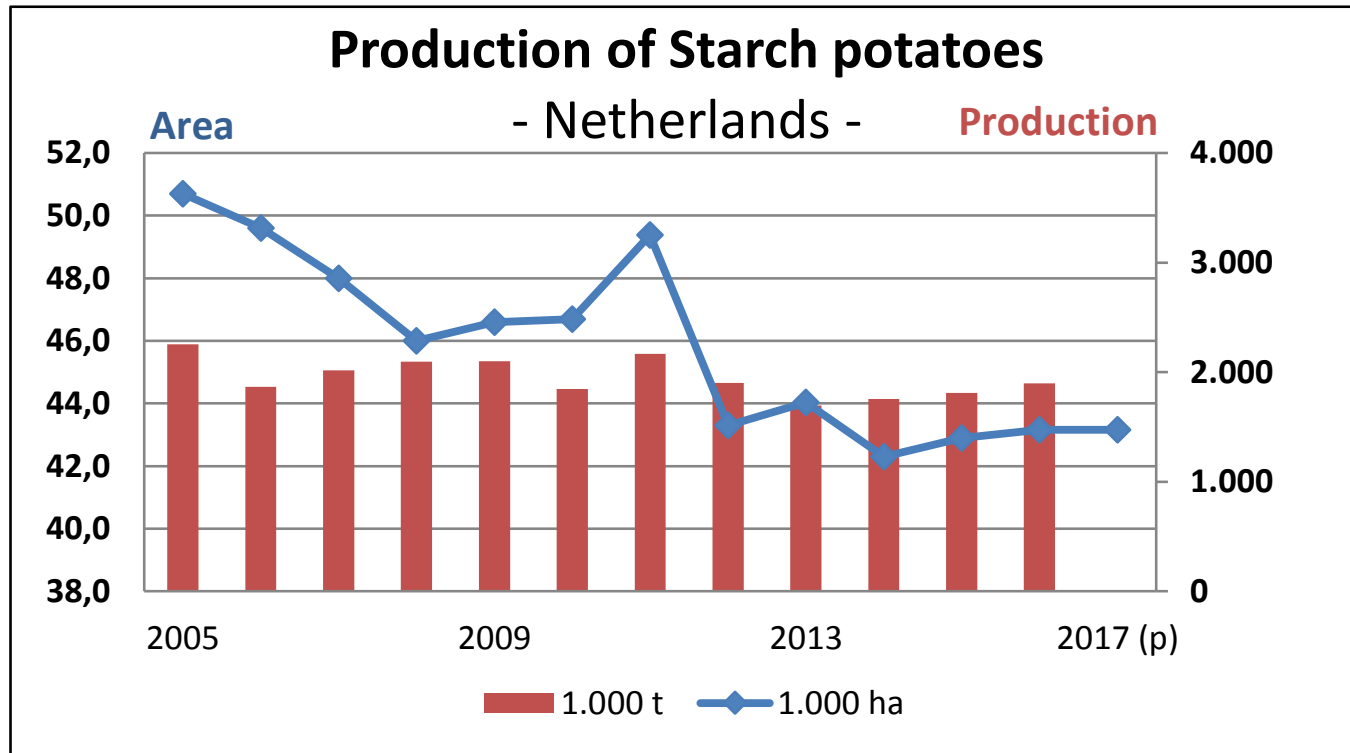
Germany



Source: BVS

- Downward trend in cultivation of starch potatoes stopped in 2017; area increased to about 53.500 ha = + 2,6% (preliminary data)
- This year larger area also for potatoes total: 248.500 ha (+6.000 ha / +2,5%)
- average to good yields expected, but lower starch content than 2016

Netherlands

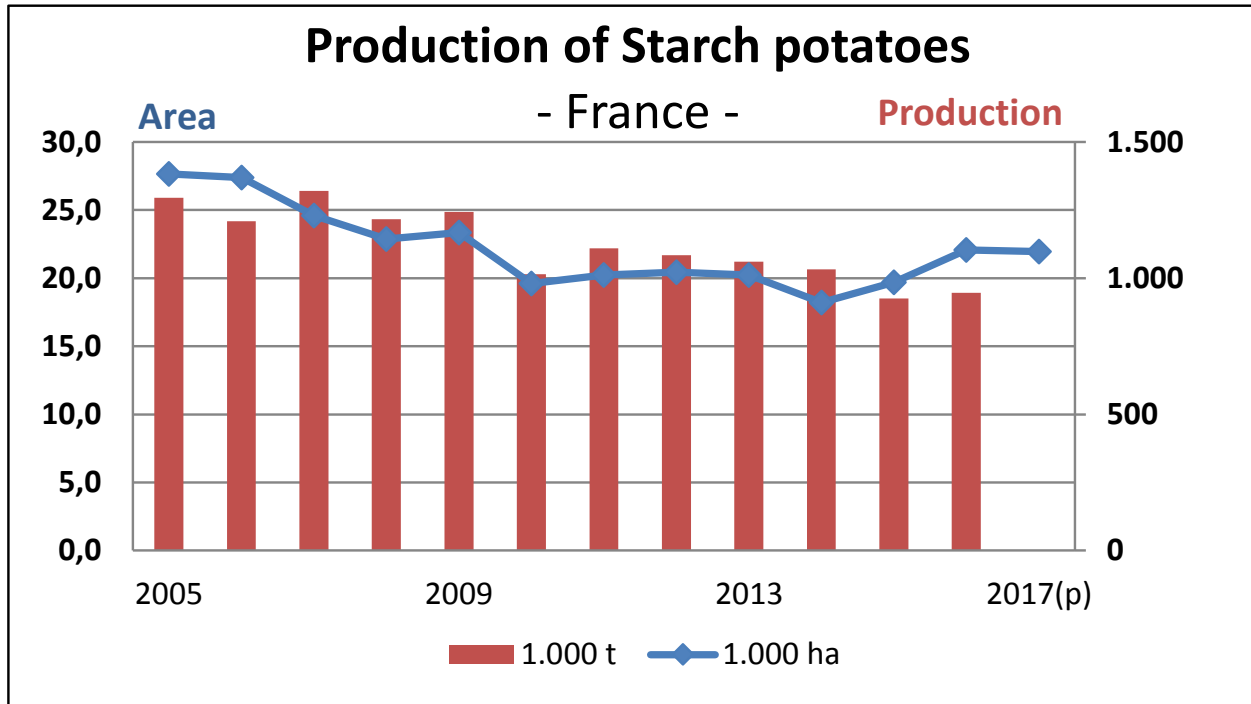


Source: CBS

- area of starch potatoes hardly changed in 2017, about 43.200 ha
- Average yields

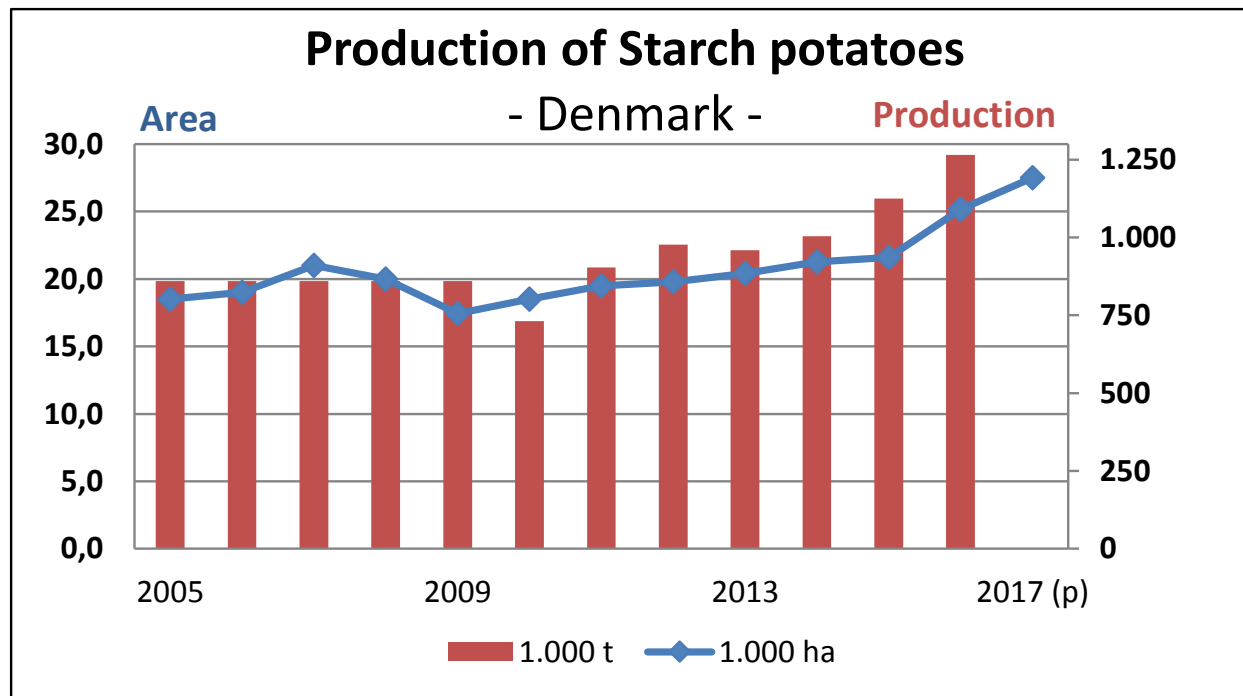
France

Source: Agreste /
CESPU



- coupled payments for starch potatoes from 2014
- downward trend in cultivation of starch potatoes stopped in 2015: 19.700 ha
- 2017: area starch potatoes close to 22.000 ha = hardly change compared to 2016
- Harvest protection meanwhile better than in summer

Denmark

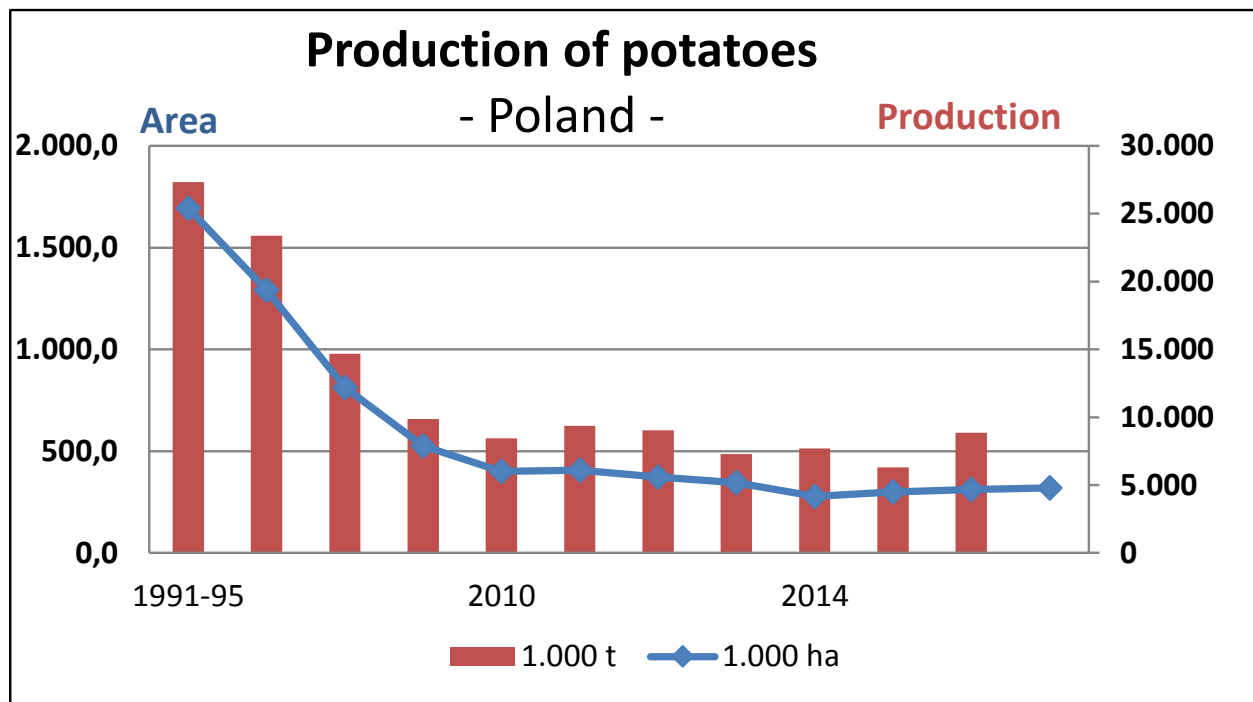


Source:
Statistical Office
Denmark / CESPU

2017:

- Potato area increased to 49.600 ha compared to 2016 = + 5.700 ha / + 13%
- Share of starch potatoes by about 55% or 27.500 ha (+2.400 ha / + 9%)
- Potatoes for consumption by about 14.100 ha (2016: 12.800 ha)
- good harvest expected

Poland



Source:
IERiGZ / CSO

2016:

- increase of potato area by 2% to 311.600 ha; mostly good weather conditions, good yields; potato harvest at 8,9 mio. tons (+ 2,6 mio tons or 40% to 2015)
- low prices for ware potatoes

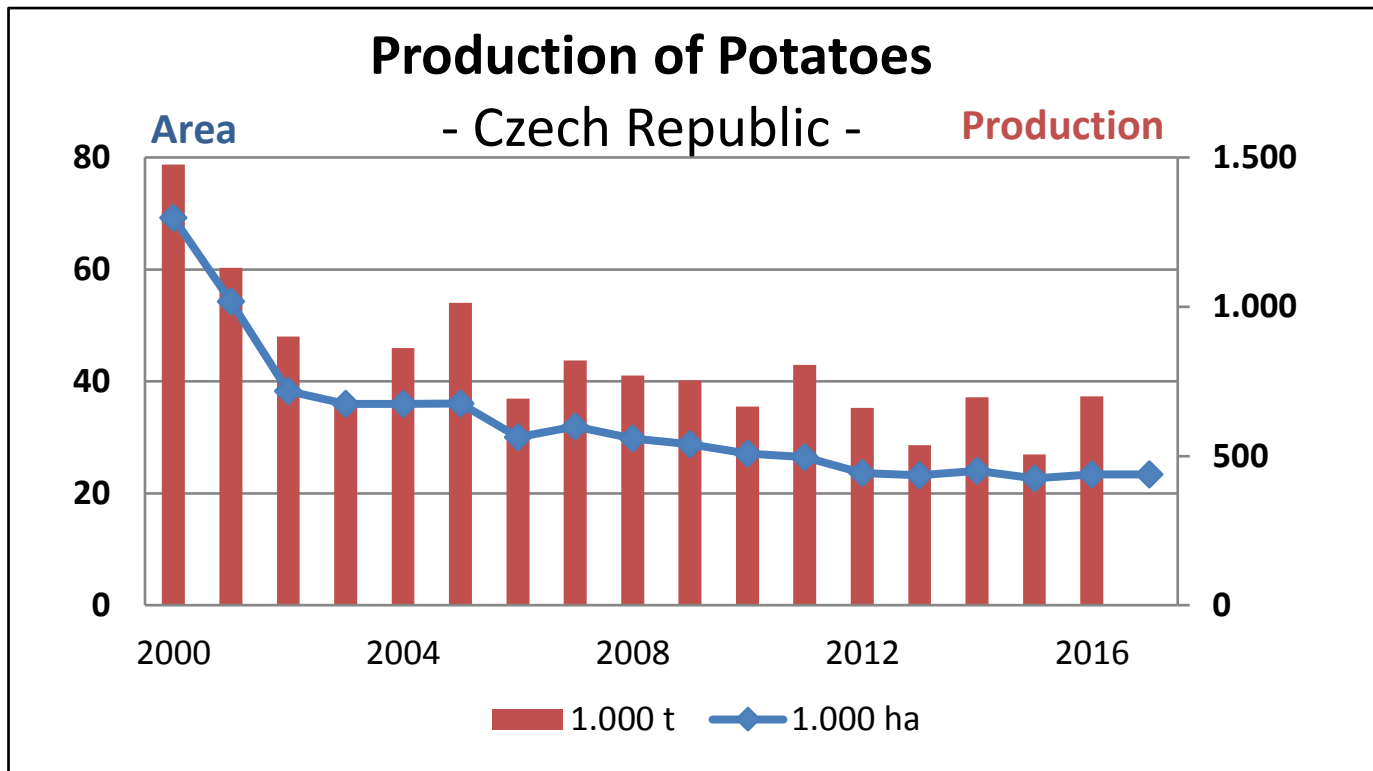
2017:

- Experts estimate a further increase of the potato area to about 320.000 ha
- Growing conditions improved during the season, but situation varied from region to region
- Potato production estimated to 9,3 mio tons

Area starch potatoes:

- 2015: 26.254 ha (coupled payments) 2016: 2017:

Czech Republic



Source:
CSO / AMI

- Cultivated area for potatoes in 2017 with 23.400 ha (preliminary) nearly at the level of 2016, but further changes within the market segments
- ...further increase of starch potato area to nearly 6.000 ha (+ 10%);
- lower yields expected than last year
- 2015: Granting of coupled payments for 4.826 ha (= +10% of announced quantitative limit)

Finland / Austria / Latvia

Finland

- 2017: with about 6.600 ha starch potato area increased by 200 ha compared to last year.
- very late season from the beginning in spring, early night frosts (27 Aug, 6 Sept), potatoes were healthy and growing before the frosts
- estimates on production very difficult
- 2015: Granting of coupled payments for 6.468 ha (announced quantitative limit by 6.720 ha)

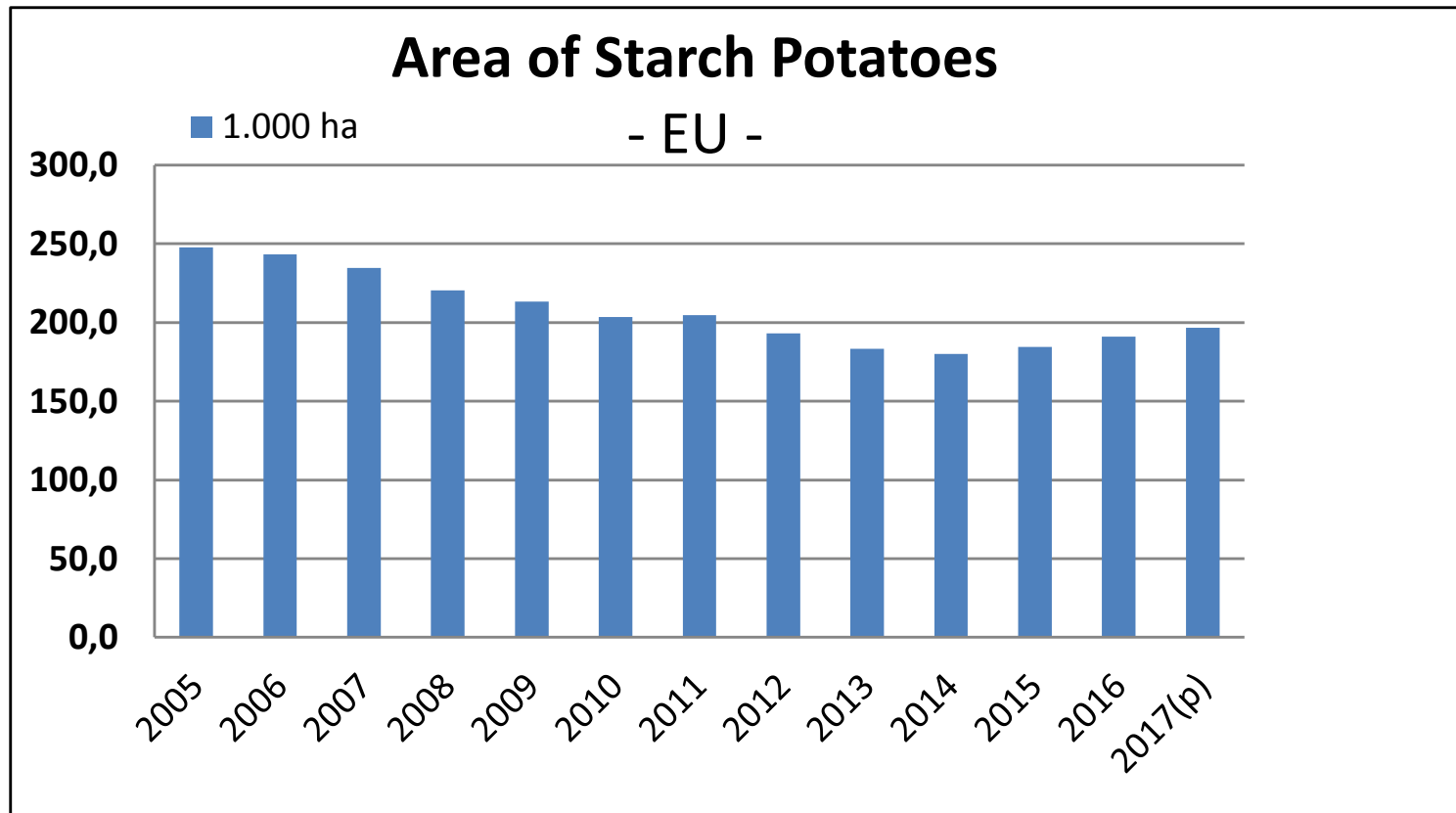
Austria

- 2017: starch potato area increased to about 6.200 ha (+ 950 ha / + 18%)
- unfavourable weather conditions (too hot and too dry), low yields

Latvia

- 2016: cultivated area for potatoes by 23.300 ha (2015: 24.800), production of 491.600 tons
- thereof only 600 ha of starch potatoes (a small part for organic production)
- 2017?
- 2015: Granting of coupled payments for 602 ha (announced quantitative limit by 507 ha)

Area of starch potatoes in the EU

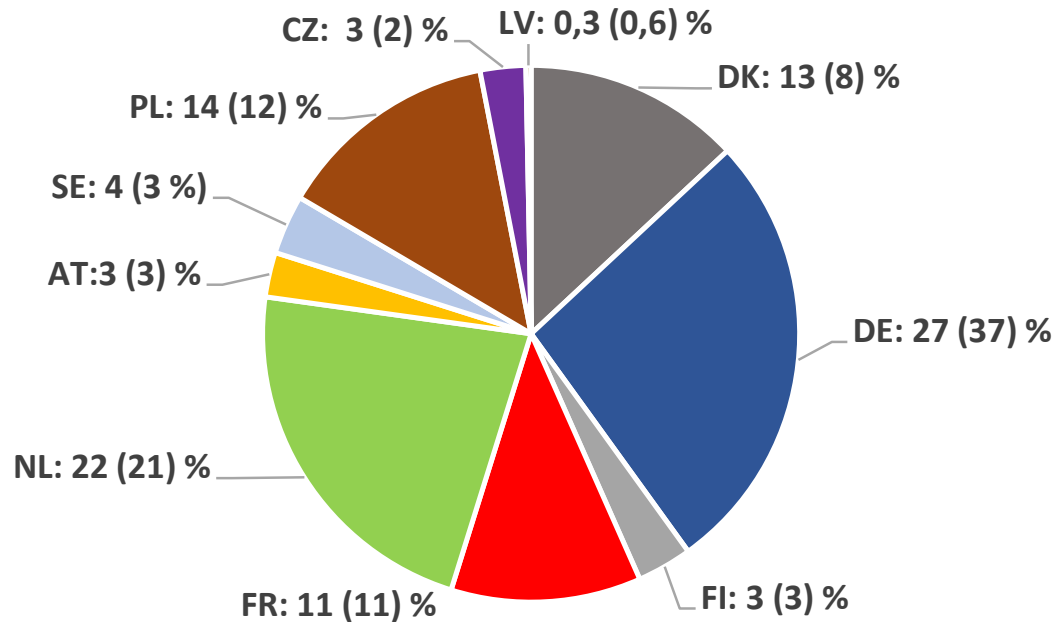


Source: BVS / CESPU

Area of starch potatoes in the EU

Area starch potatoes - share by country

2016: rd. 193.000 (2005: 247.800) ha



Source: BVS /
CESPU

Summary

- since 2015: reversal trend in EU's starch potato area
- In most MS, starch potato area increased in 2017 or remained nearly unchanged; for EU total rise to about 198.000 (2016: 193.000) ha possible
- driver of these developments
 - coupled payments for starch potatoes (PL, CZ)
 - Good market conditions, few/less alternatives in cultivation
- changing and different weather conditions during growing season; estimations on yields very difficult, the majority of starch potatoes has still to be harvested

Please note:

- The presented figures are preliminary data or estimations = description of tendencies
- Official statistical figures for starch potatoes only given in some MS
- Not included are
 - deliveries to the factories outside of contracts
 - level of starch content

Thank you

Quota for Starch Potatoes in the European Union (1.000 tons)

	2000/2001	2001/2002 to 2004/2005	2005/2006 to 2011/2012	Share of quota (%)
Germany	676,7	656,3	656,3	33,68
The Netherlands	523,2	507,4	507,4	26,04
France	273,6	265,4	265,4	13,62
Denmark	173,4	168,2	168,2	8,63
Sweden	63,0	62,1	62,1	3,18
Finland	54,0	53,2	53,2	2,73
Austria	48,4	47,7	47,7	2,45
Spain	2,0	1,9	1,9	0,10
EU-15	1.814	1.762,1	1.762,1	90,43
Poland			145,0	7,44
Czech Republic			33,7	1,73
Latvia			5,8	0,30
Lithuania			1,2	0,06
Slovakia			0,7	0,04
Estonia			0,3	0,01
EU-10			186,6	9,58
EU-27			1.948,8	100,00

Source: COM