



Committee of the European Starch Potato Producers' Unions

Overview of the market situation for starch potatoes

CDG Agricultural markets- starch

9th October 2023



Main aspects for an economical and sustainable potato production

- attractive markets (demand, prices), competition
- suitable legal conditions in agribusiness
- modern production processes and techniques, including availability of
 - effective plant protection measures
 - water
 - fertilizer
 - energy
- know how
- suitable weather conditions

...and this season?

- strong contrasting weather conditions
 - while planting
 - to maintain potato crops healthy
 - for harvesting

...and the future?

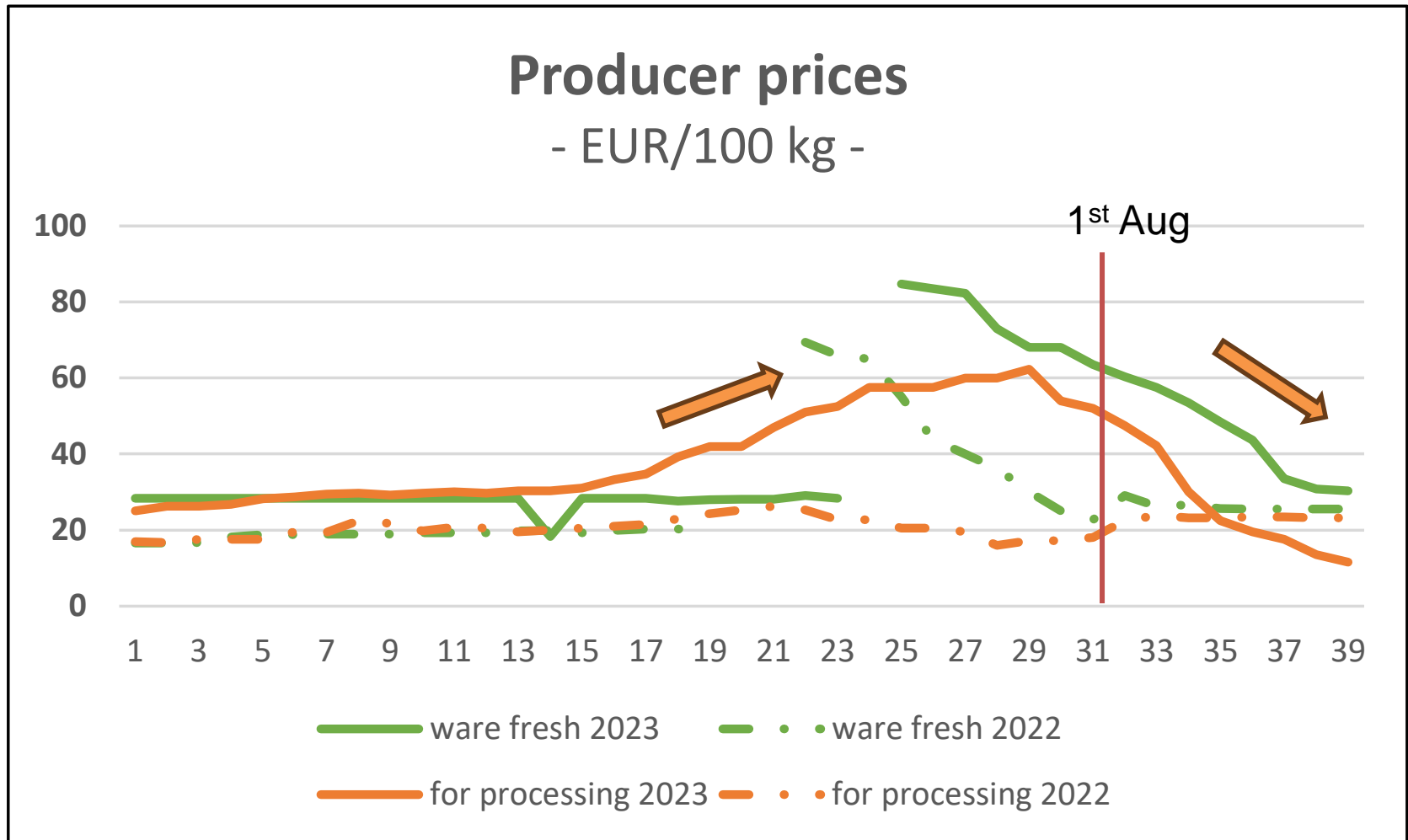
- Legislation
 - Green Deal / F2F / Biodiversity: Sustainable use of pesticides (SUR)
 - Common Agricultural Policy (GAEC standards, eco schemes...)
 -
 - New Genomic Techniques

Prices (1st October week 2022)

	2022	2021	2020	2019
Ware potatoes (DE, fresh market)				
Producer prices (EUR/100 kg)	21 - 30	12 – 20	7 – 13	17 – 20
Consumer prices (vf) (EUR/kg)	0,90	0,62	0,57	0,72
Potatoes for feeding (EUR/100 kg)	1 - 3	1 - 3	1 - 2	6 – 20
Processing (EUR/100 kg)	40+	40+	35/40+	40+
Fontane, Innovator and other (DE)	24 - 25	11,50 - 13	3 – 3,50	10,50 - 11
Fiwap/PCA	25 – 26	12	3	10 – 12,50
Belgapom Fontane/Challenger	25 - 26	11 - 12	3	10
Potato NL	20,50 – 25,50	11 – 14	2,50 - 3,50	10,50-12,50

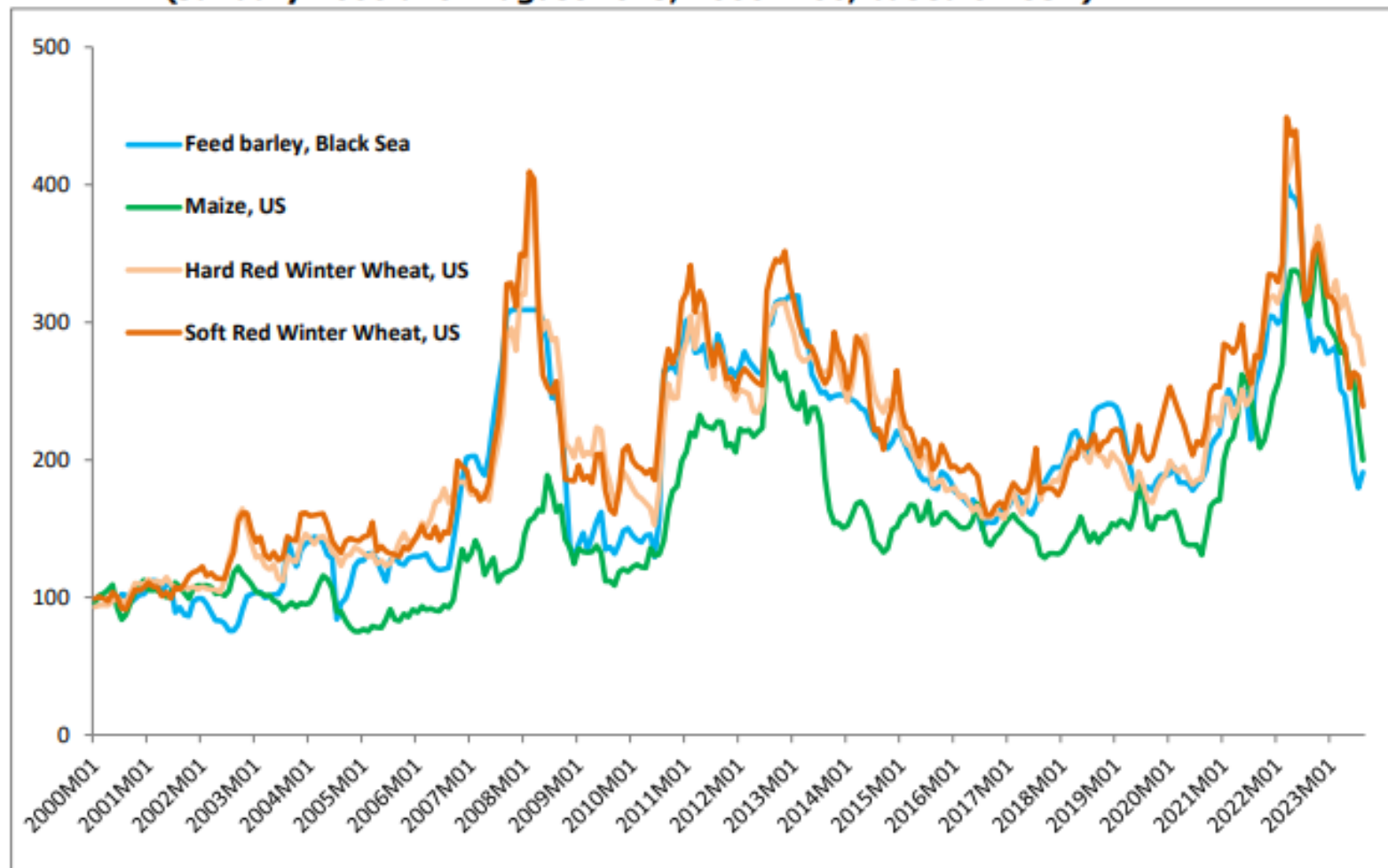
Euronext Paris, futures contracts (€/t)

Wheat, Dec	345	269	198	175
Maize, Nov	337	244	172	164
Rapeseed, Nov	617	676	385	386

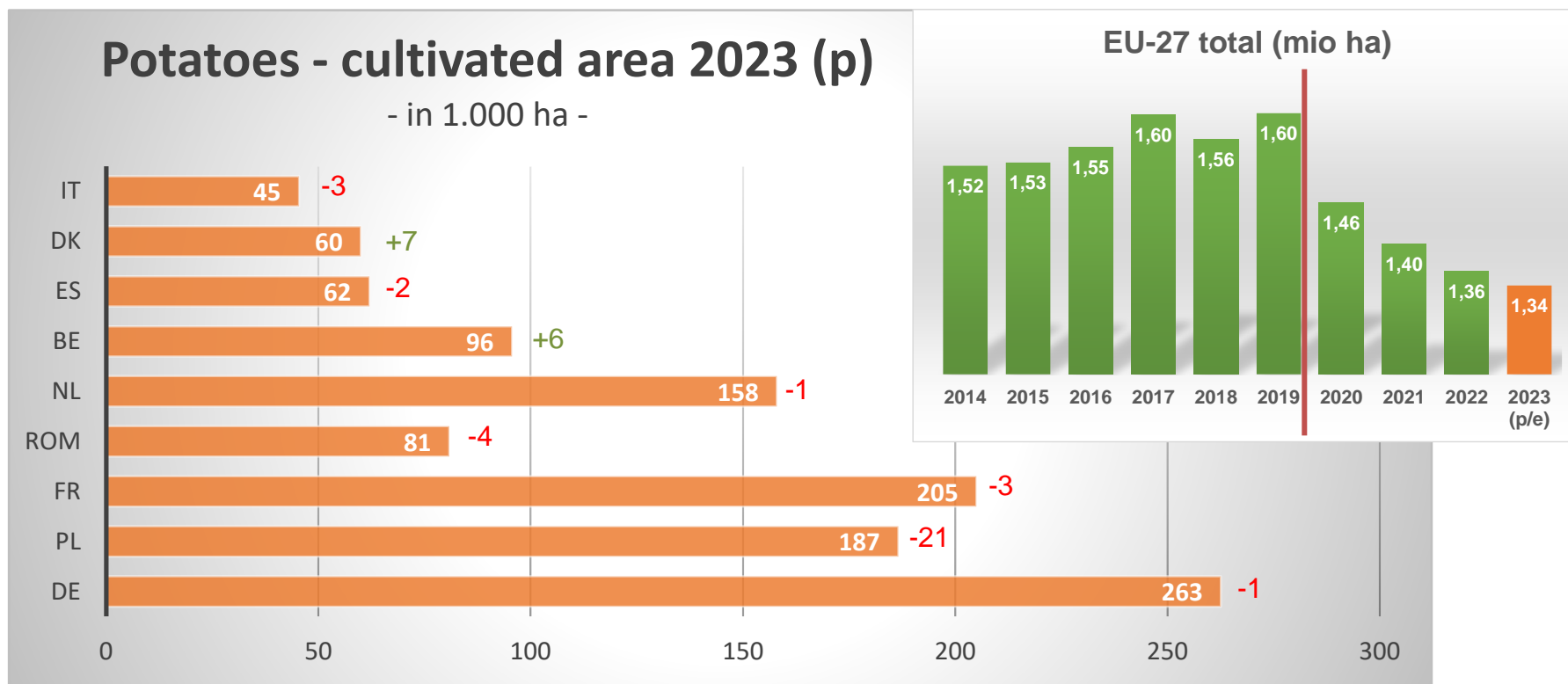


Prices for cereals

Chart 4. Cereals: international price developments
(January 2000 until August 2023, 2000=100, based on USD)



EU Potato area



p = preliminary. e = estimations. From 2020, Poland revised area by about 75.000 ha.

Remark to Polish potato area 2023: Whereas official statistics show 186.580 ha (p), market experts estimate nearly the same level as 2022

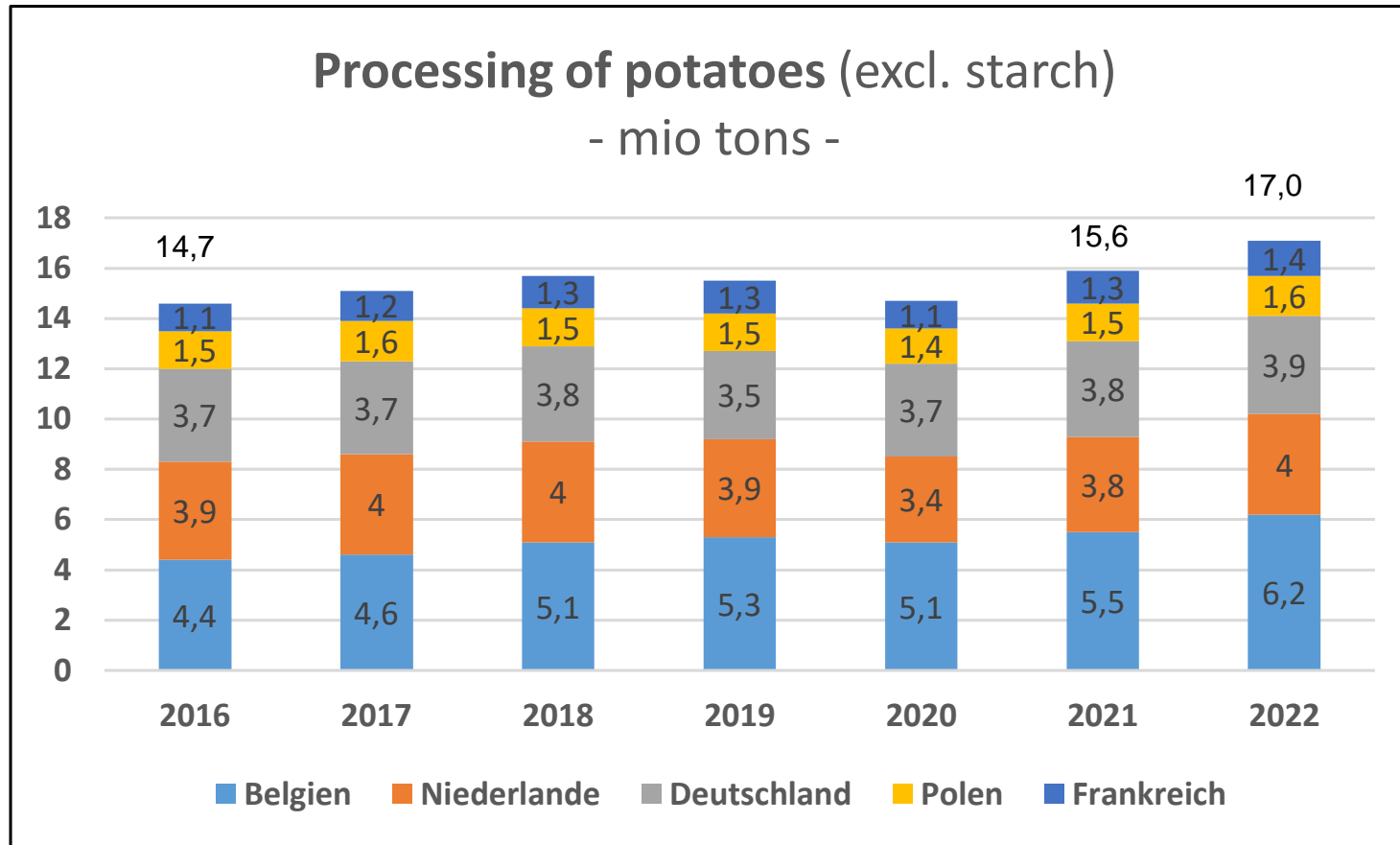
- EU-27 (p/e): 1,34 mio ha (use official Polish figure)
- 2022: 1,36 -1,7%
- 2020-22: 1,41 -5,0%

AND: continuous trend towards

- more for processing
- less for starch and seed

Source:
Eurostat/National Statistical Offices

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 (!)

EU-4: Consumption potatoes

Update on planted area in the NEPG zone

EU-04 CONSUMPTION POTATOES (Excl. Seed and Starch)									
05 September 2023									
year	2018	2019	2020	2021	2022	2023	actual vs l.y.	5y-avge	2023 vs 5y-avge %
Countries NEPG									
Hectareage 5y avge	447.357	461.253	475.755	494.068	502.886				
Annual Variation	2,5%	4,1%	1,3%	(4,6%)	2,5%				
Total	495.338	515.541	522.275	498.010	510.616	518.873	2,5%	508.356	2,1%
BE - Belgium	94.428	97.921	96.985	89.649	92.355	96.639	4,6%	94.268	2,5%
DE - Germany	178.500	186.000	189.700	183.060	189.000	189.810	0,4%	185.252	2,5%
FR - France	145.260	152.720	158.590	153.913	152.590	156.940	2,9%	152.615	2,8%
NL - Netherlands	77.150	78.900	77.000	71.388	76.671	75.484	(1,5%)	76.222	(1,0%)

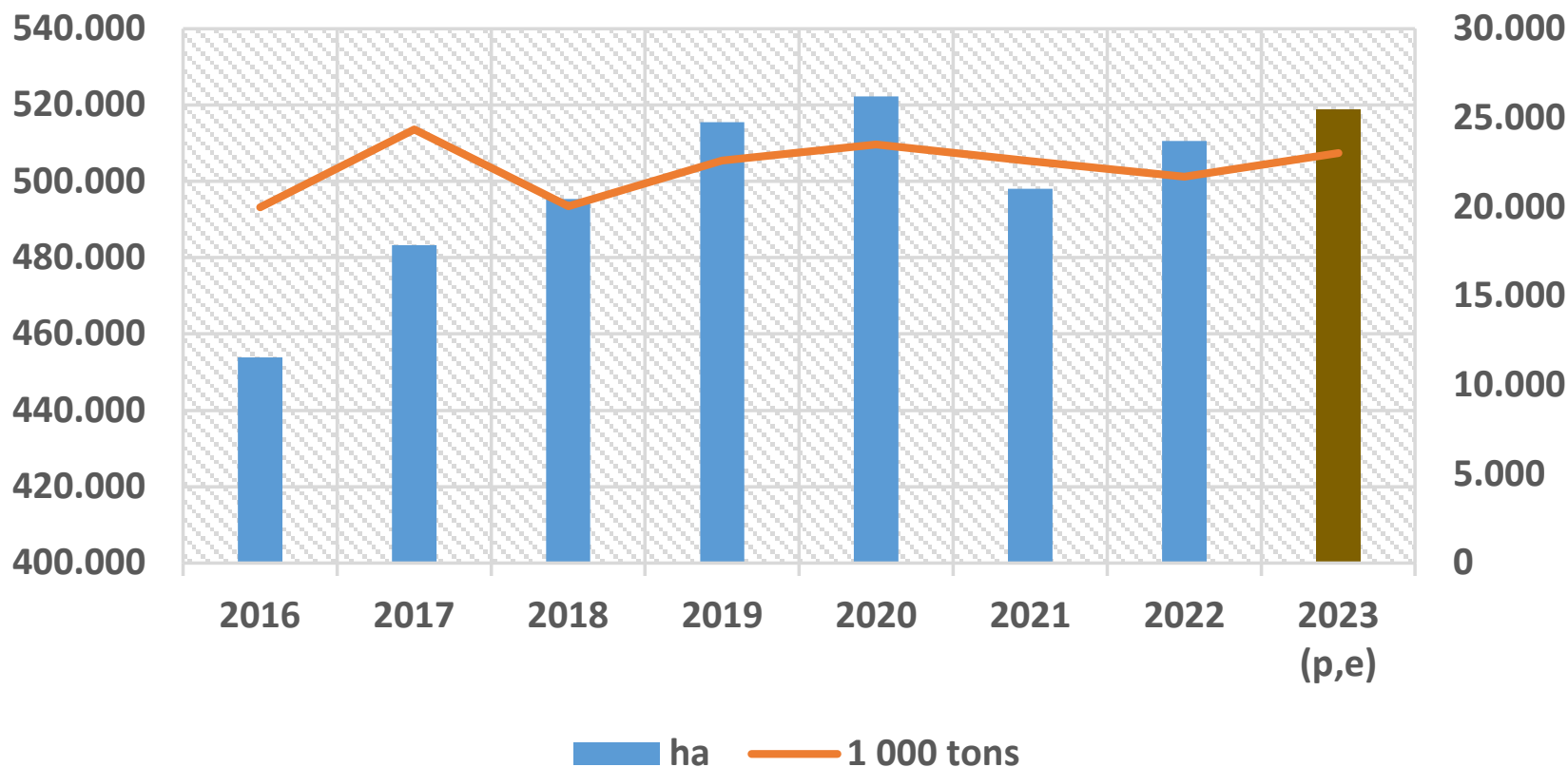
- 2023 (e/p): 518.873 ha
- 2018 – 2023: + 23.535 ha (4,8%)



Source: NEPG

EU-4 - consumption potatoes

NEPG-4: Potatoes for consumption

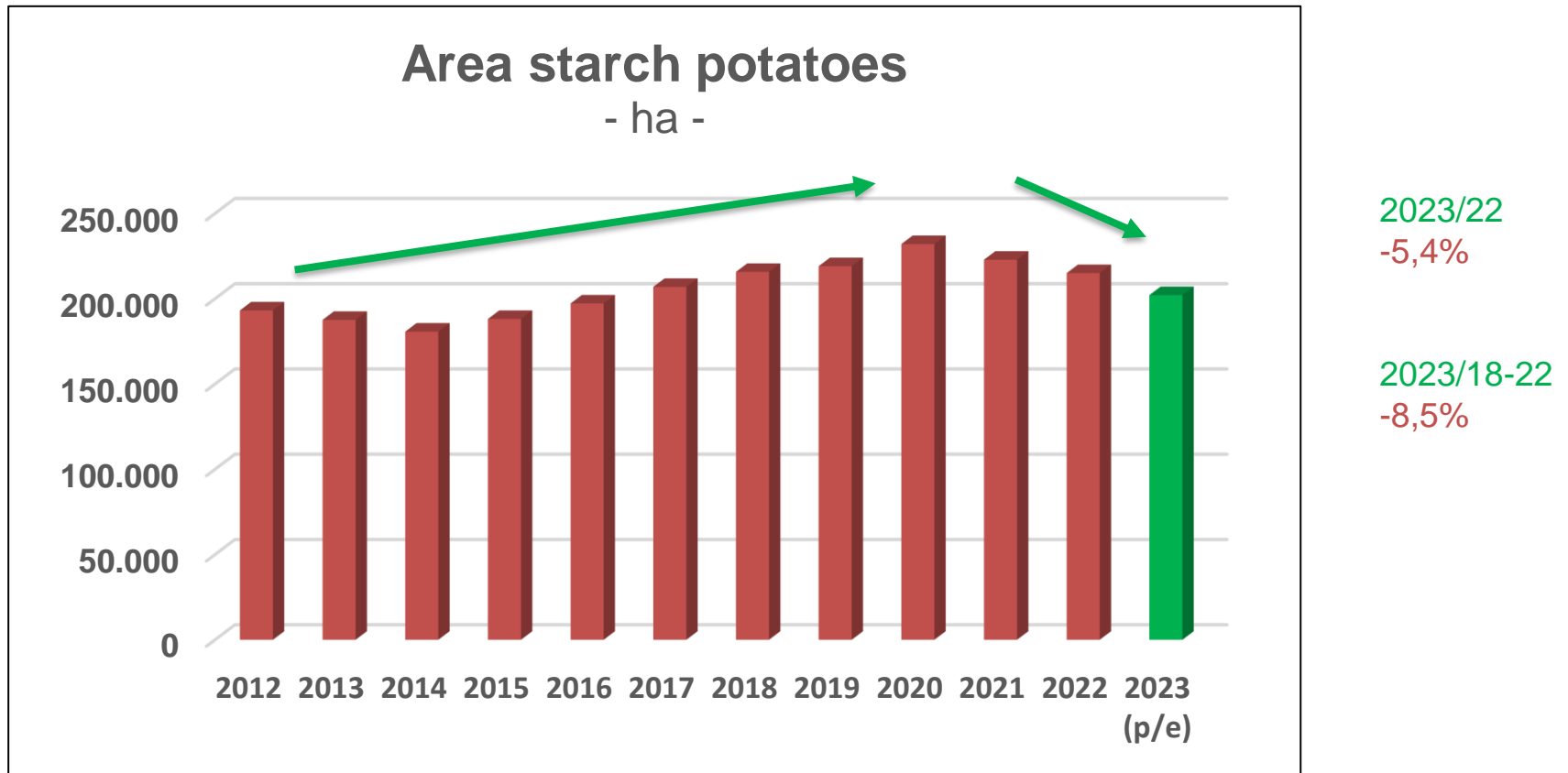


➤ EU-4 2023 (estimation): 23 – 24 mio tons (?)

Source: NEPG

2022: 21,7 mio tons

2018-22: 22,1 mio tons



p = preliminary. e = estimations.

Starch potatoes

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023 (v/s)	2023/22 (%)
DE	58.487	53.288	52.796	52.125	53.523	56.621	57.013	61.555	60.339	58.564	55.930	96
NL	44.030	42.310	42.930	43.170	44.040	45.080	44.940	45.104	45.150	43.380	40.100	92
FR	20.222	18.272	21.014	23.215	23.315	24.075	22.404	23.600	23.774	20.370	16.300	80
DK	20.400	21.562	22.012	25.543	27.250	28.786	33.270	39.800	34.000	36.500	41.376	113
FI ^{1,3)}	5.638	6.040	6.468	6.332	6.550	6.640	6.744	6.588	6.404	6.026	5.500	91
SE ⁴⁾	6.070	6.141	6.455	6.875	7.479	7.923	7.365	7.940	8.781	8.282	7.350	89
AT	5.265	4.901	4.766	5.219	6.186	6.821	7.235	6.505	5.959	5.360	5.415	101
CESPU-7	160.112	152.514	156.441	162.479	168.343	175.946	178.971	191.092	184.407	178.482	171.971	96
PL ^{2,3)}	23.000	23.000	26.254	28.973	31.999	33.077	33.723	34.590	32.846	29.200	24.500	84
CZ ³⁾	3.985	4.670	4.826	5.205	5.882	5.851	5.722	5.541	5.520	5.347	4.969	93
LV ³⁾	471	507	602	544	697	832	657	794	752	750	750	100
EU-10	187.568	180.691	188.123	197.201	206.921	215.706	219.073	232.017	223.525	213.779	202.190	95

p = preliminary. e = estimation. 1) harvested area. 2) By 2014 estimated data. 3) final data for coupled payment of starch potatoes in 2015 – 2021. 4) including seed for starch potatoes. 5) data partly preliminary

Quelle: CESPU

➤ 2023: 202.190 ha
 2022: 213.779 ha -5%
 2018-22: 220.820 ha -8%

Source:
 CESPU/BVS/European
 Commission

TOP 8: Common Agricultural Policy

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 -

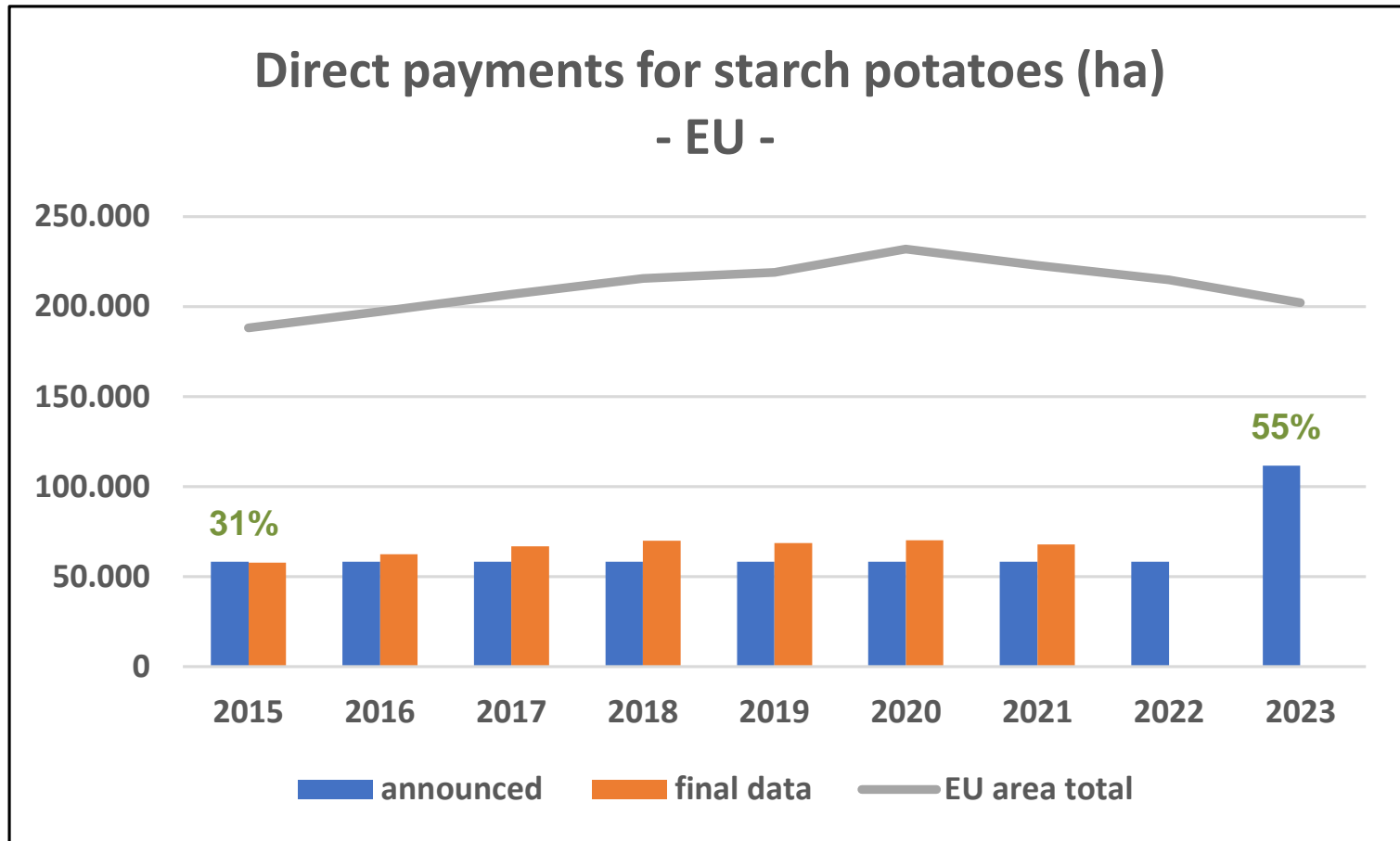
2021	final	Supported area (ha)
535	EUR/ha	5.520
2.951	1.000 EUR	
77	EUR/ha	22.223
1.703	1.000 EUR	
269	EUR/ha	752
202	1.000 EUR	
258	EUR/ha	32.846
8.473	1.000 EUR	
565	EUR/ha	6.404
3.620	1.000 EUR	
250	EUR/ha	67.745
16.950	1.000 EUR	

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

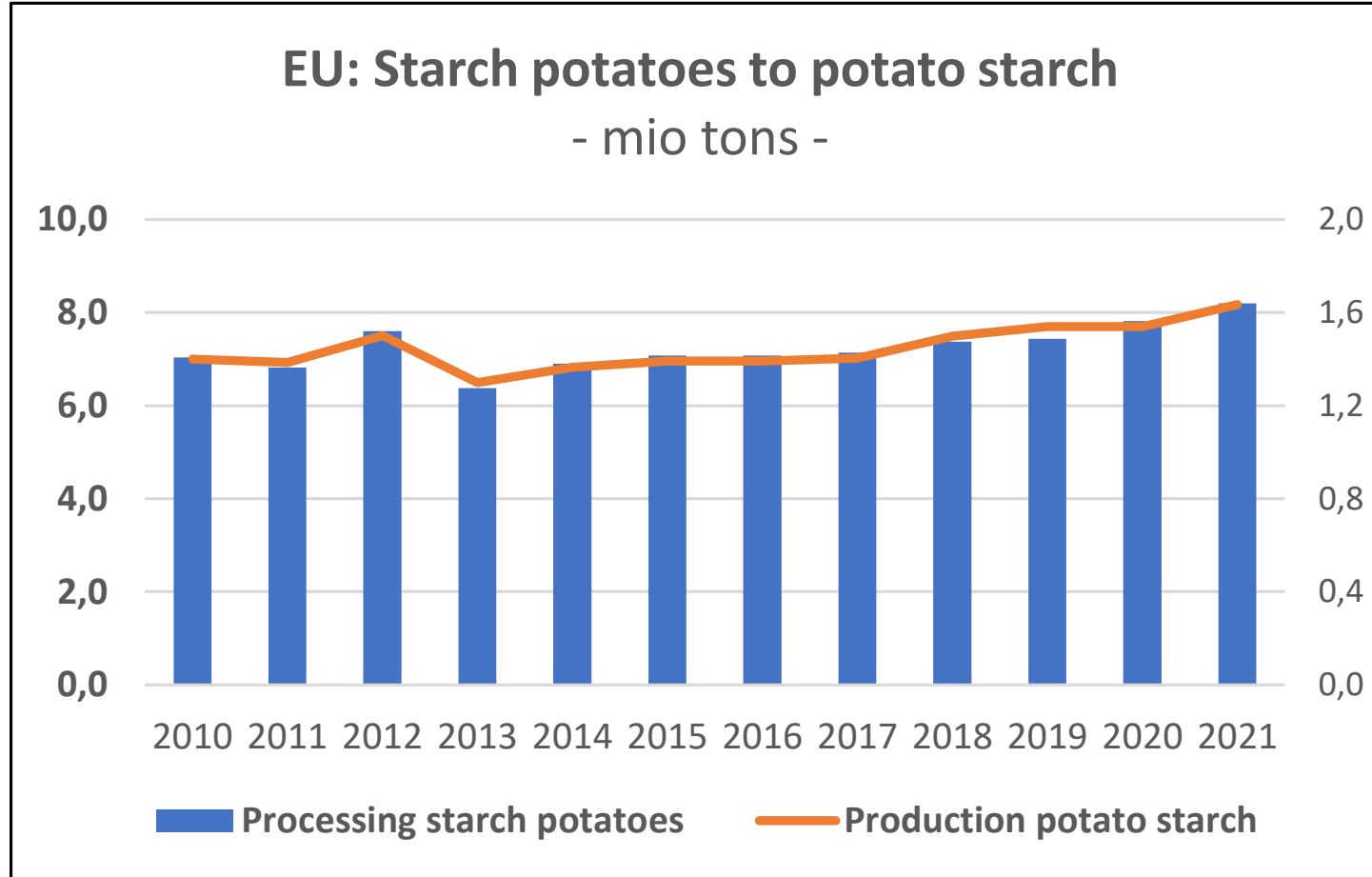
Source:

CIS: Announcements according to CAP strategic plans.

VCS: European Commission

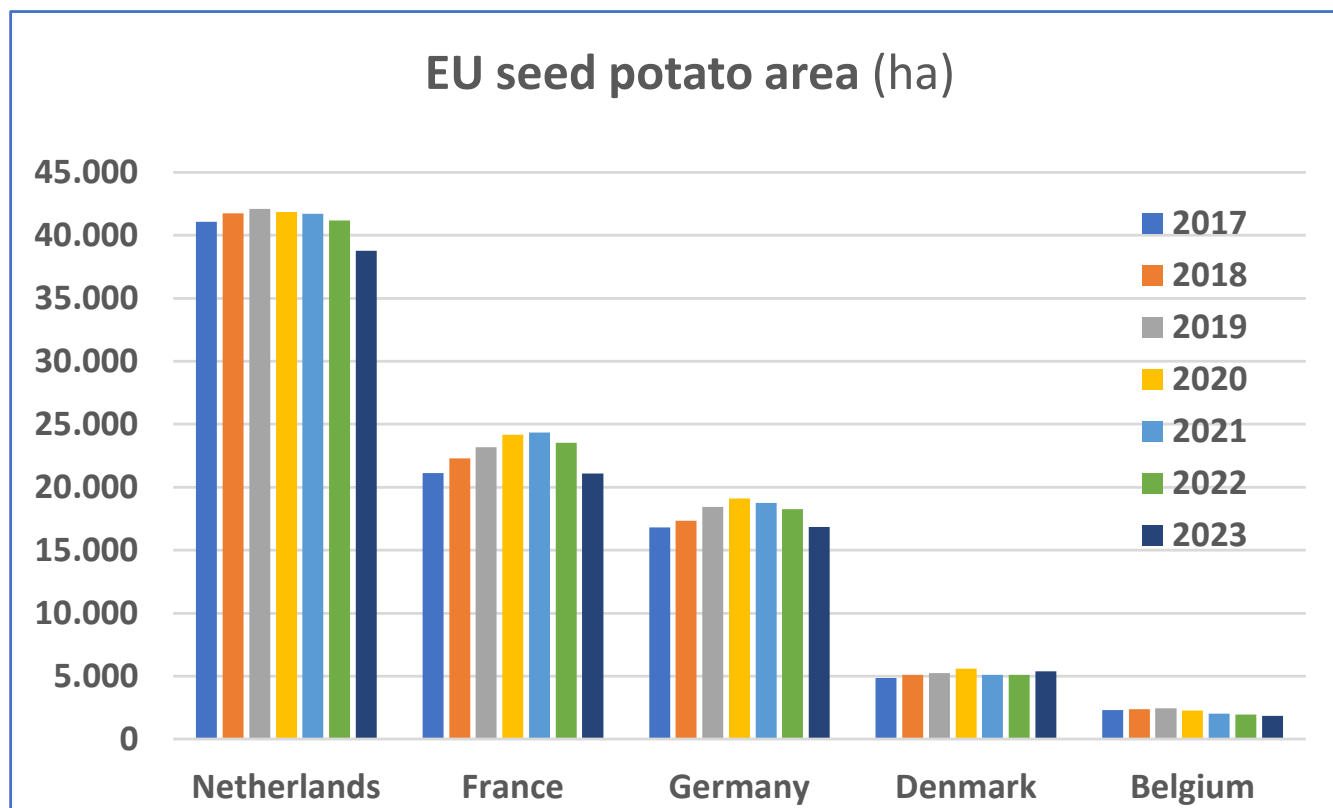


Starch potatoes to potato starch



From 2018 including peas to pea starch

Source: Fachverband der Stärke-
Industrie/StarchEurope



Share organic 2023:

- NL 600 ha = 1,5%
- FR: 575 ha = 2,7%
- DE: 1.002 ha = 5,9%
- DK: 148 ha = 2,7%

2023/22

-7%

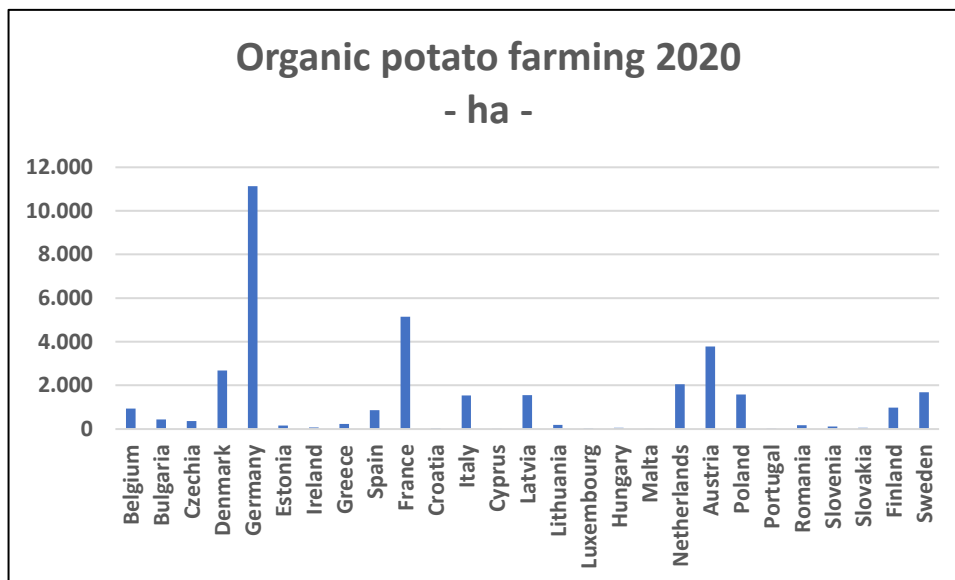
2023/18-22

-8%

	2017	2018	2019	2020	2021	2022	2023
EU-5	86.173	88.876	91.433	92.984	91.968	90.044	83.952

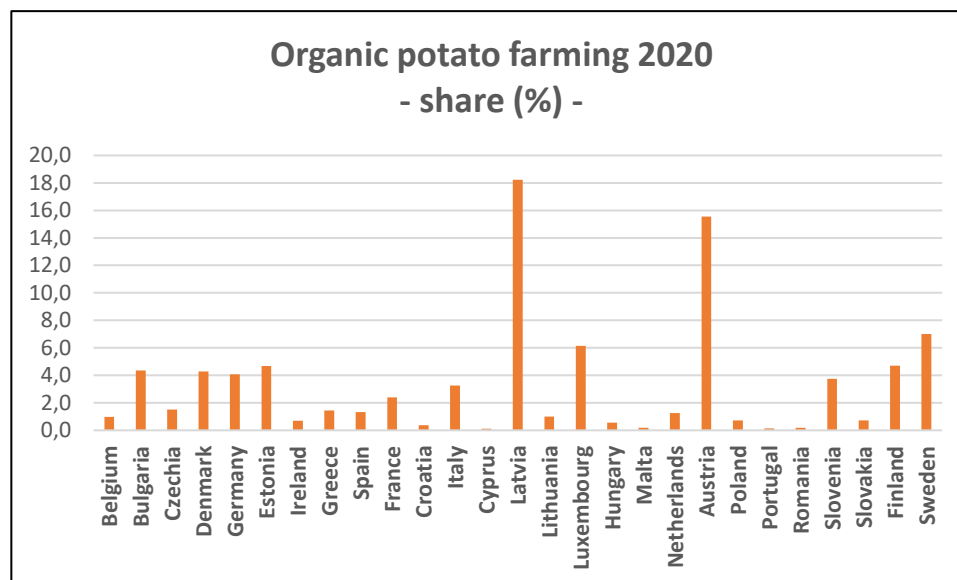
Organic potato farming

Source: Eurostat



EU total

- acreage: 35.809 ha
- Share organic: 2,4%

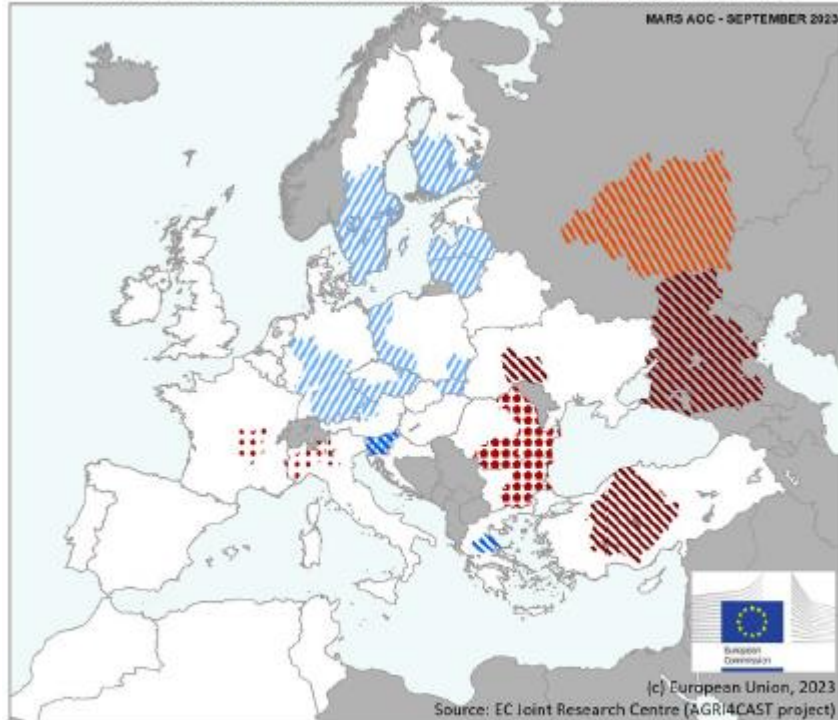


Extreme weather events

COMs Crop monitoring MARS (18 September 2023)

AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 August 2023 until 10 September 2023



Crop	Yield t/ha				
	Avg 5yrs	August Bulletin	MARS 2023 forecasts	%23/5yrs	% Diff August
Spring barley	4.19	3.60	3.59	-14	-0
Grain maize	7.48	7.45	7.26	-3	-3
Potatoes	34.1	34.4	34.7	+2	+1
Sugar beet	72.0	73.7	74.5	+4	+1
Sunflower	2.21	2.18	2.20	-1	+1
Soybeans	2.76	2.82	2.83	+3	+0
Green maize	40.7	40.3	40.3	-1	+0
Rice	6.50	—	6.43	-1	—

Issued: 18 September 2023

Source: COM

Wet soil conditions

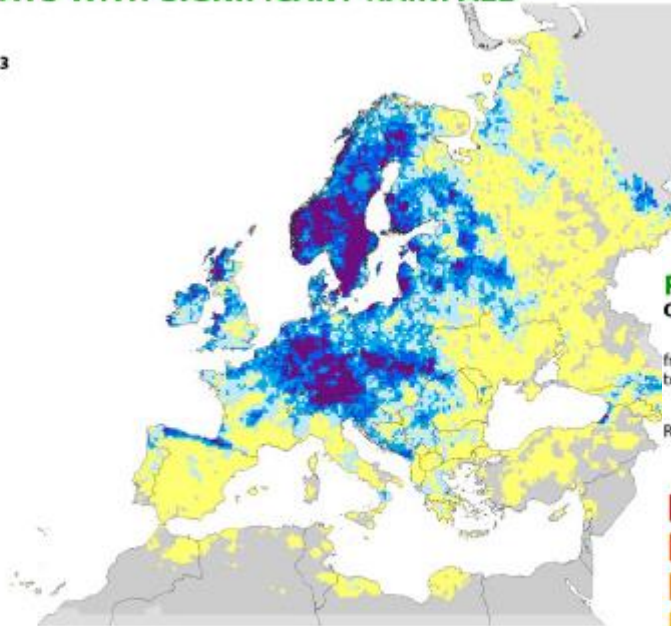
COMs Crop monitoring MARS (12 September 2023)

NUMBER OF DAYS WITH SIGNIFICANT RAINFALL

from: 01 August 2023
to: 10 September 2023
Rain (mm) > 5

Units: days
= 0
1 - 3
4 - 5
6 - 7
7 - 9
≥ 10

12/09/2023
Resolution: 25 X 25 Km



© European Union, 2023
Source: EC Joint Research Centre (AGRI4CAST project)

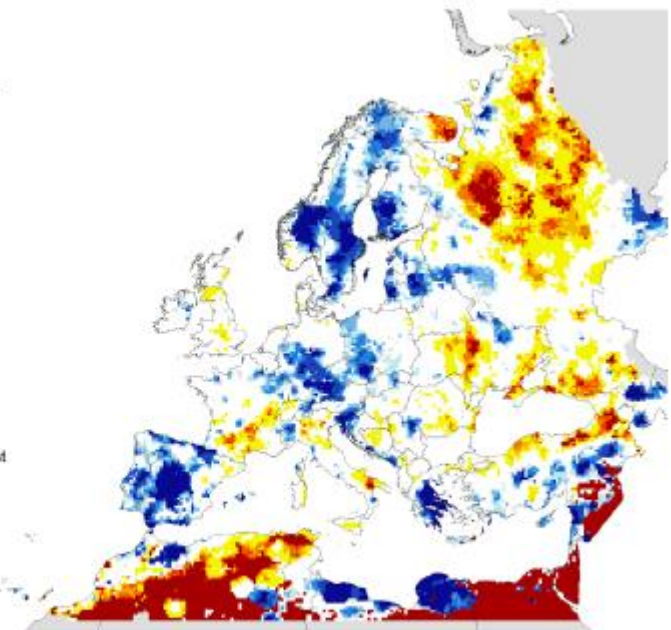
RAINFALL Cumulative values

from: 01 August 2023
to: 10 September 2023

Ranking since 1991

Driest year
Second driest
Third driest
Fourth driest
From fifth to tenth driest
Others
From fifth to tenth wettest
Fourth wettest
Third wettest
Second wettest
Wettest year

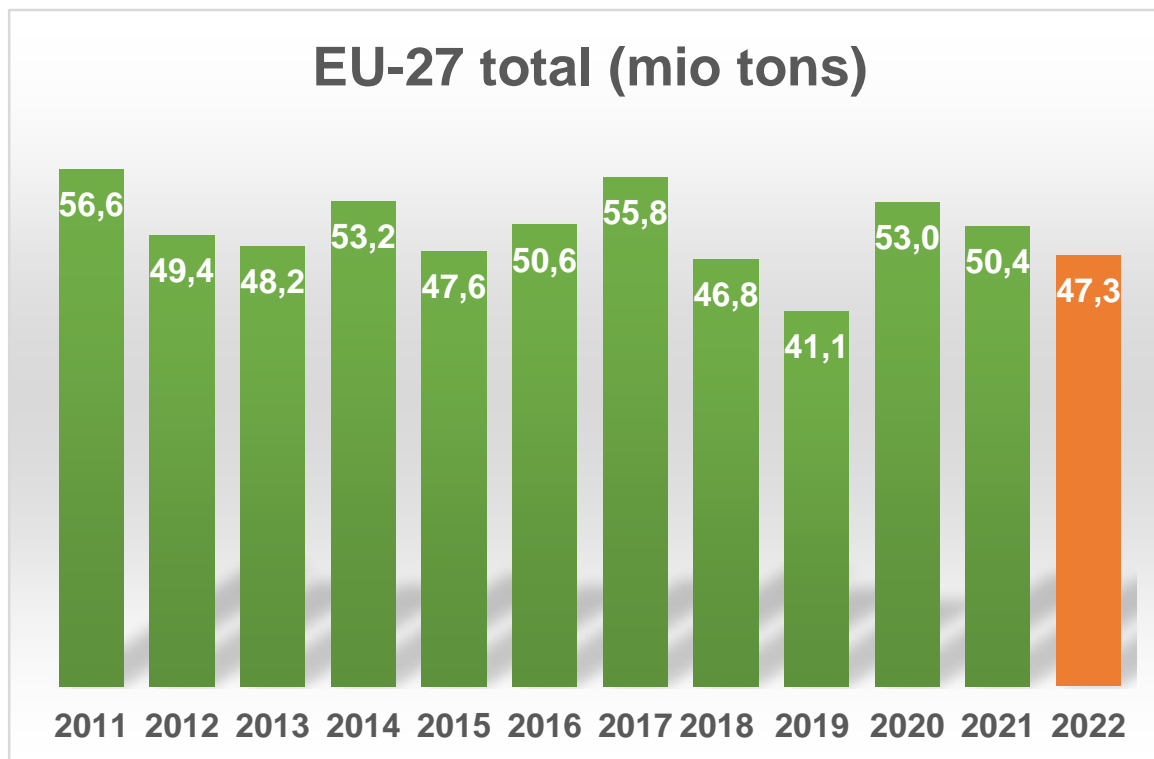
12/09/2023
Resolution: 25 X 25 Km



© European Union, 2023
Source: EC Joint Research Centre (AGRI4CAST project)

Source: COM

EU Potato production



- EU-27 2023 (e) (MARS) 46,5 mio tons (1,34 mio ha x 34,7 t/ha) = brutto!
48 - 49

2022: 47,3 mio tons
2018-22: 47,7 mio tons

- EU-27 (p/e): 1,34 mio ha
- 2022: 1,36 -1,7%
- 2020-22: 1,41 -5,0%

Source:
Eurostat/National Statistical Offices

Main quality problems 2023



Late blight in potatoes



Early blight in potatoes



hollow centres



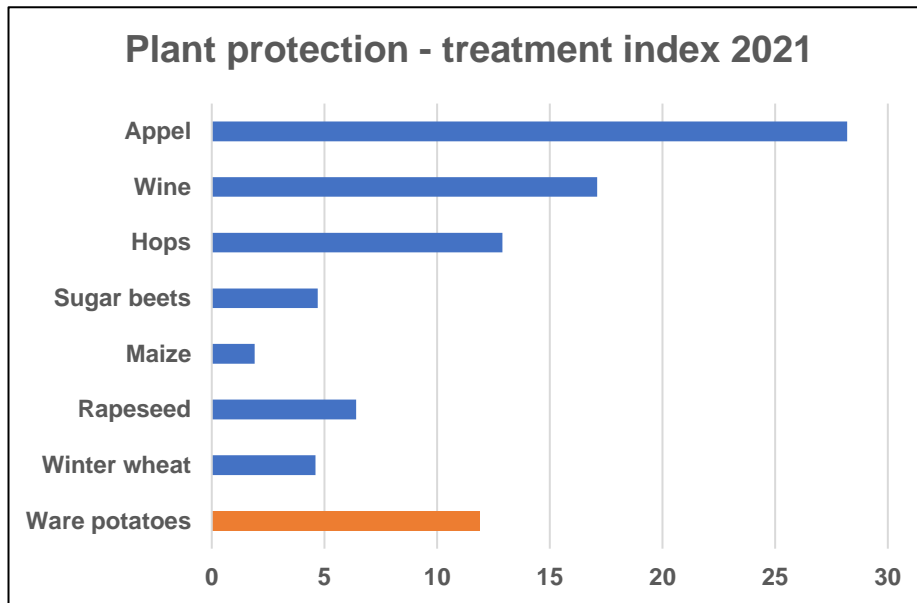
wire worm damages

Storage!

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

Plant protection – a big challenge!

Plant protection – a big challenge

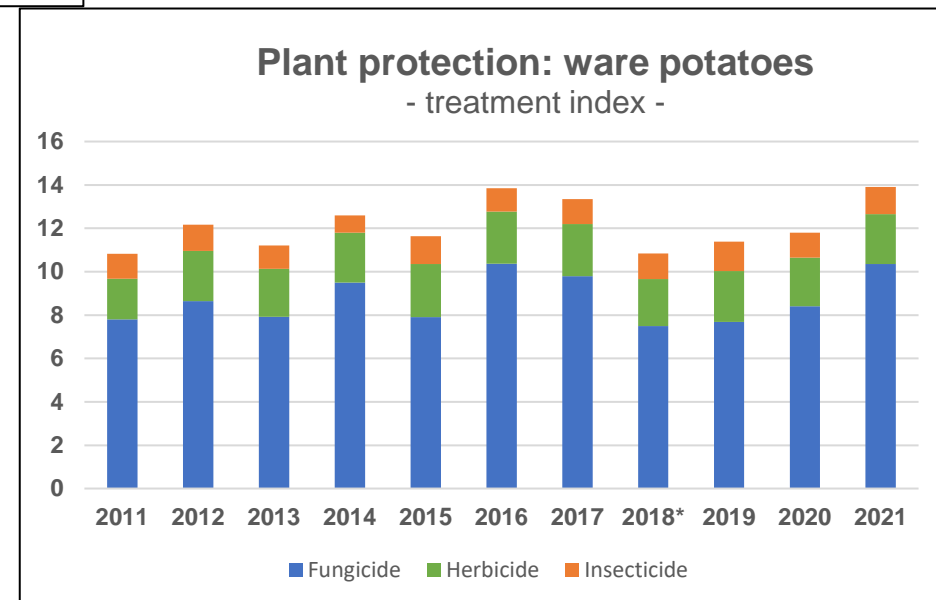


Sustainable Use Regulation (SUR):

50% less pesticides by 2030!?

We need:

- Local adapted solutions in plant protection instead of general ban of pesticides
- smart farming/spot spraying
- potential of resilient varieties from modern breeding (e.g. NGT)



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



Committee of the European Starch Potato Producers' Unions

Thank you

