



***The European potato industry  
in a world context***

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# World Potato Markets

Essential weekly information for potato growers, packers, processors, buyers and retailers. Subscribers across Europe, North America and Australasia

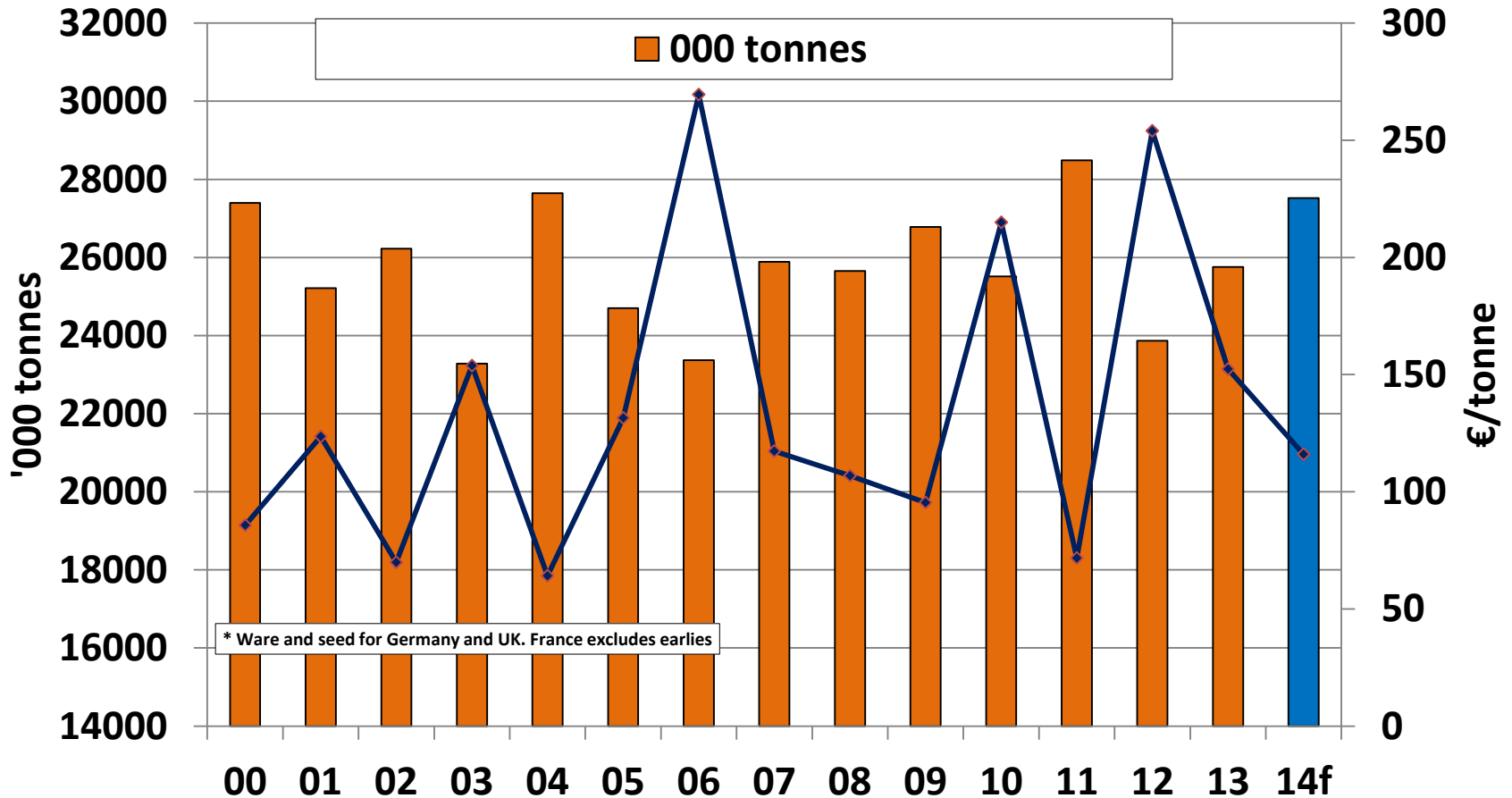
***World Potato Markets*** covers European and World markets for potatoes, keeping track of physical and futures market prices and the latest area, yield and production statistics. It also monitors world trade in fresh potatoes, fries, chips (crisps) and dehydrated products.

***World Potato Markets*** provides detailed forecasts of plantings and yields in the central five countries (Germany, the Netherlands, France, UK and Belgium). It also reports on crops in other EU countries, in North America and in other important growing countries.

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# The 2014 European harvest

EU-5 ware\* potato production ('000 tonnes)

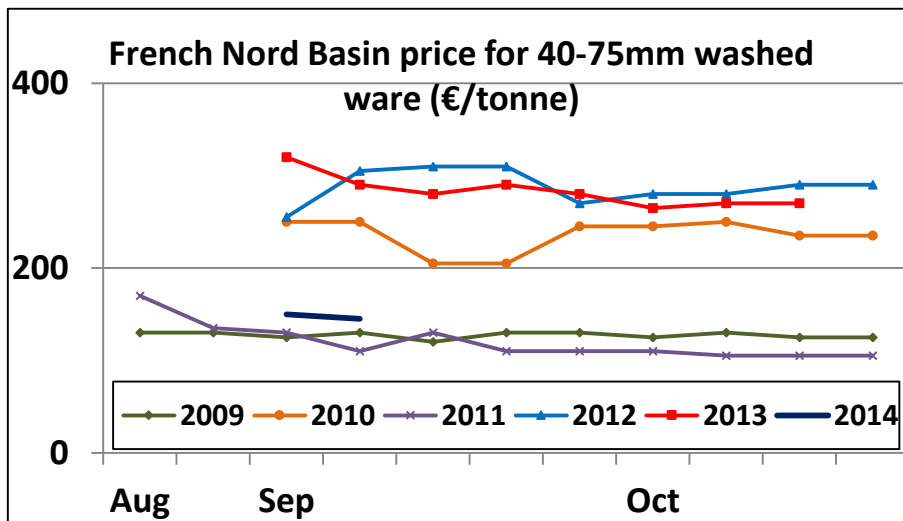
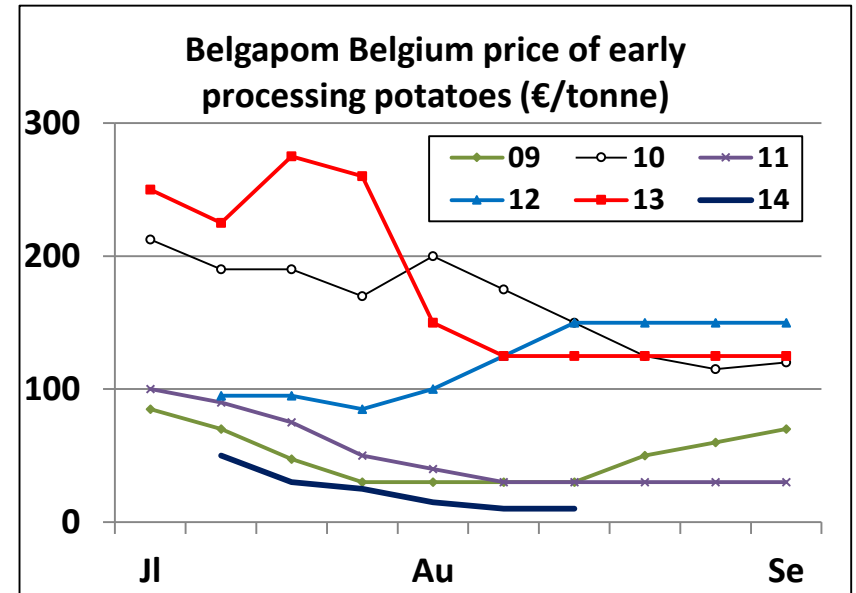
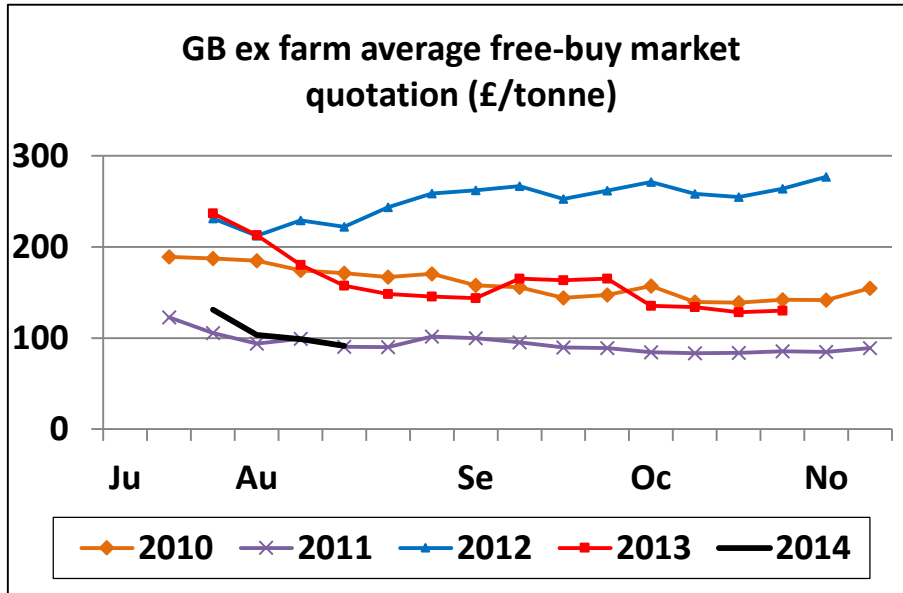


### EU-5 area, yield and production of ware potatoes,\* 2009 to provisional/forecast 2014

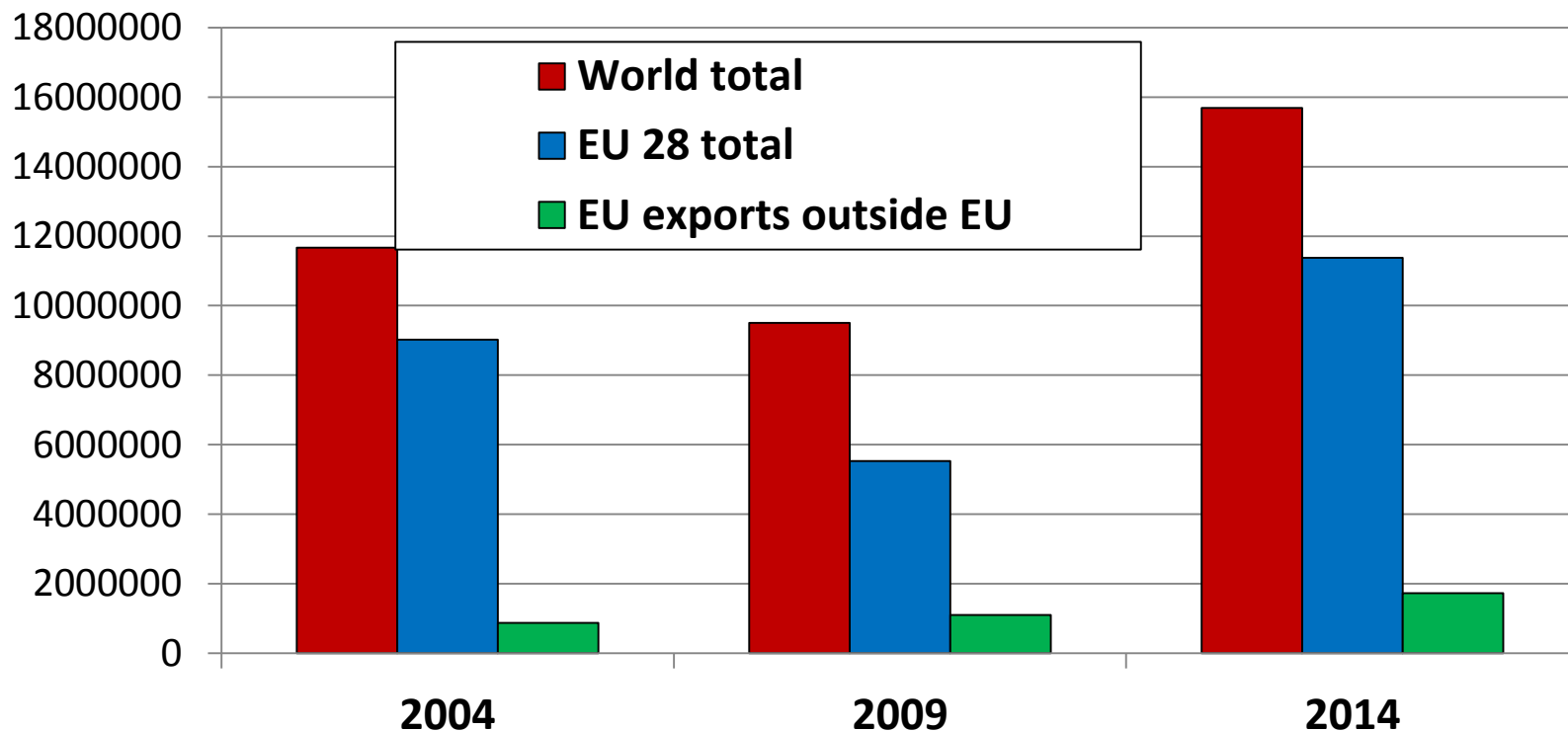
	2014pf	% ch'ge	2013p	% ch'ge	2012	2011	2010	2009
<b>Area (hectares)</b>	600200	+3.2	581711	+3.3	563237	598909	582440	583320
<b>Yield (tonnes/ha)</b>	45.86	+3.6	44.28	+4.5	42.37	47.56	43.81	45.91
<b>Harvest ( '000 tonnes)</b>	<b>27524.3</b>	<b>+6.9</b>	<b>25758.4</b>	<b>+7.9</b>	<b>23864.4</b>	<b>28486.4</b>	<b>25514.2</b>	<b>26778.3</b>

Note: WPM forecasts for 2014. \*Ware/seed for Germany and UK; France excludes earlies. Sources: National authorities; AMI.

# Potato prices already falling across Europe

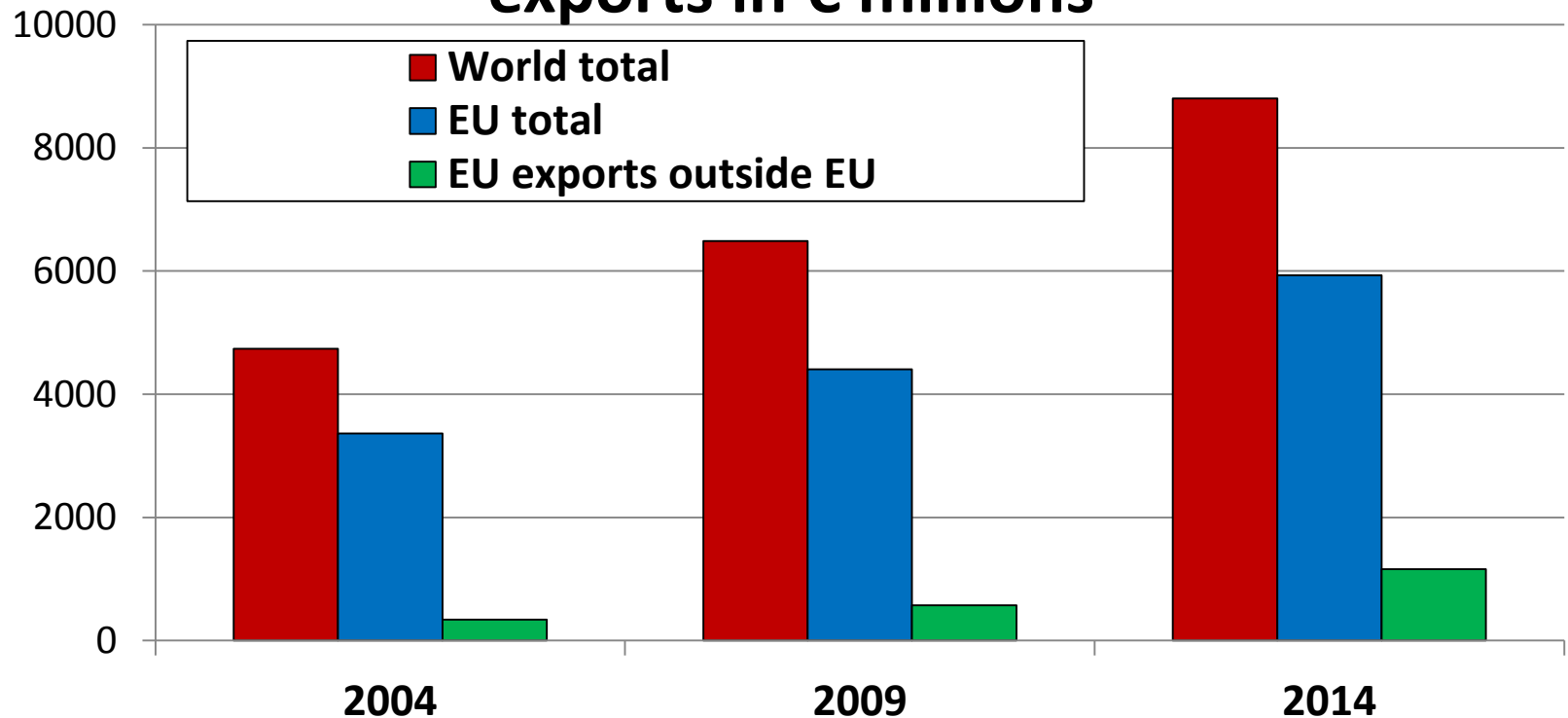


## Growing trade. World and EU total potato and product exports in tonnes



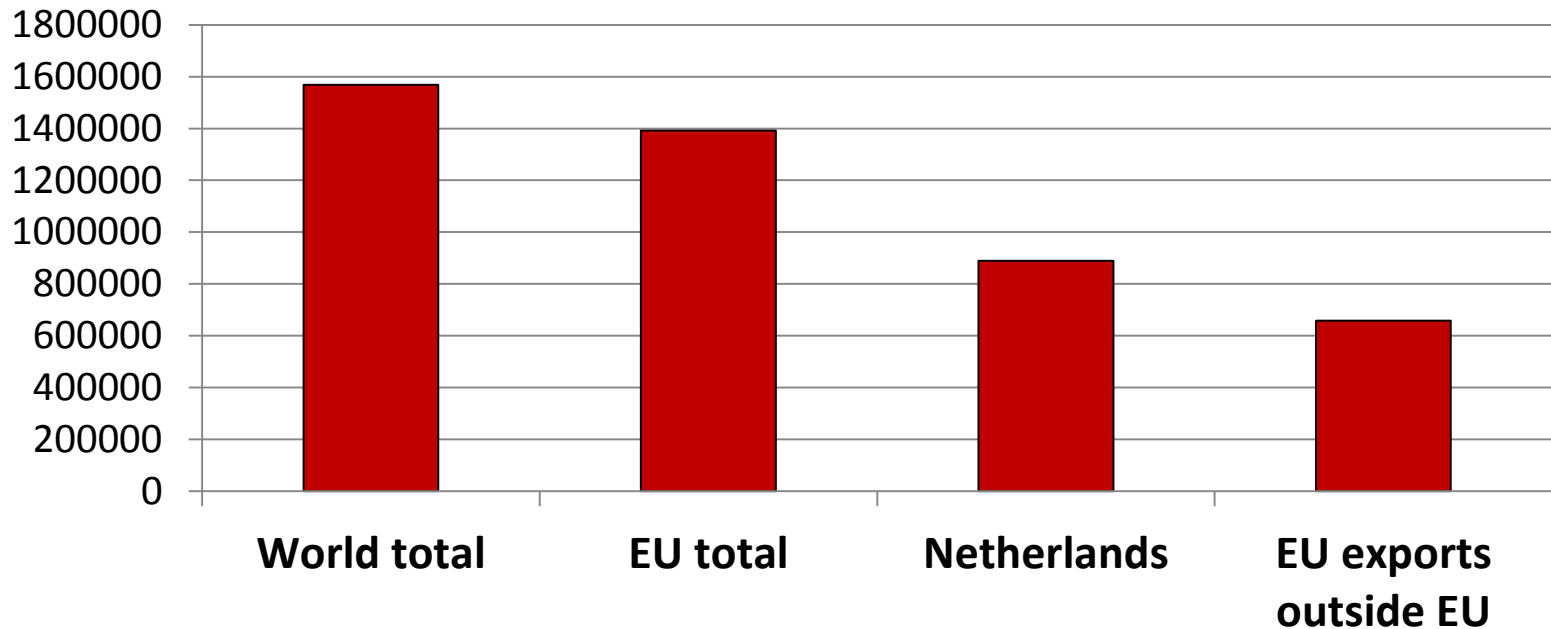
EU potato exports accounted for 72.5% of world trade in year to April 2014 and increased by 26% between 2004 and 2014. EU exports outside the EU accounted for 15% of EU trade in 2014 and were 97.5% up on 2004

# World and EU potato and produce exports in € millions



**EU potato exports accounted for 72.5% of world trade by value in year to 2014 and increased by 76% between 2004 and 2014. EU exports outside the EU were 20% of the total in 2014 and up 410% on the 2004 figure**

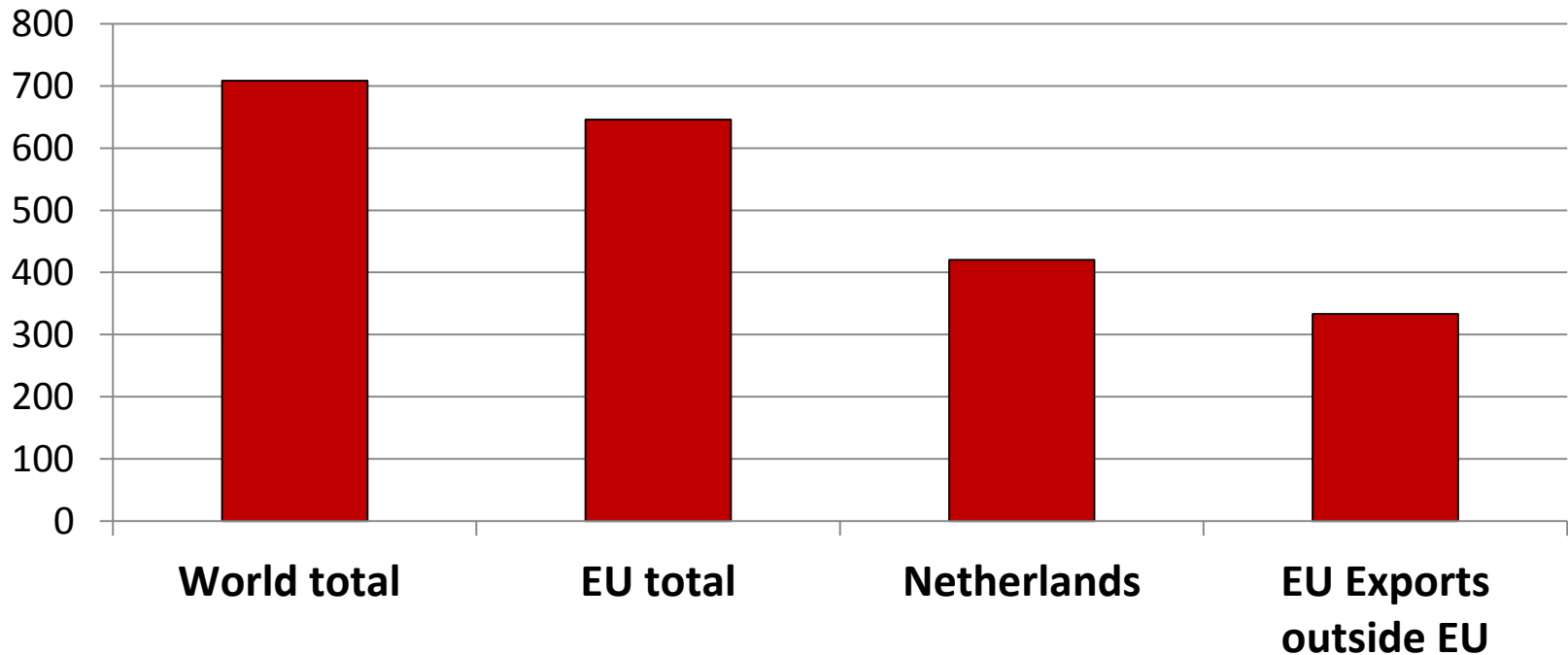
## World and EU potato seed exports in tonnes in year to April 2014



**The EU accounts for 89% of world seed exports by value with 42% of sales outside the EU. The Netherlands accounts for 57% of world trade**

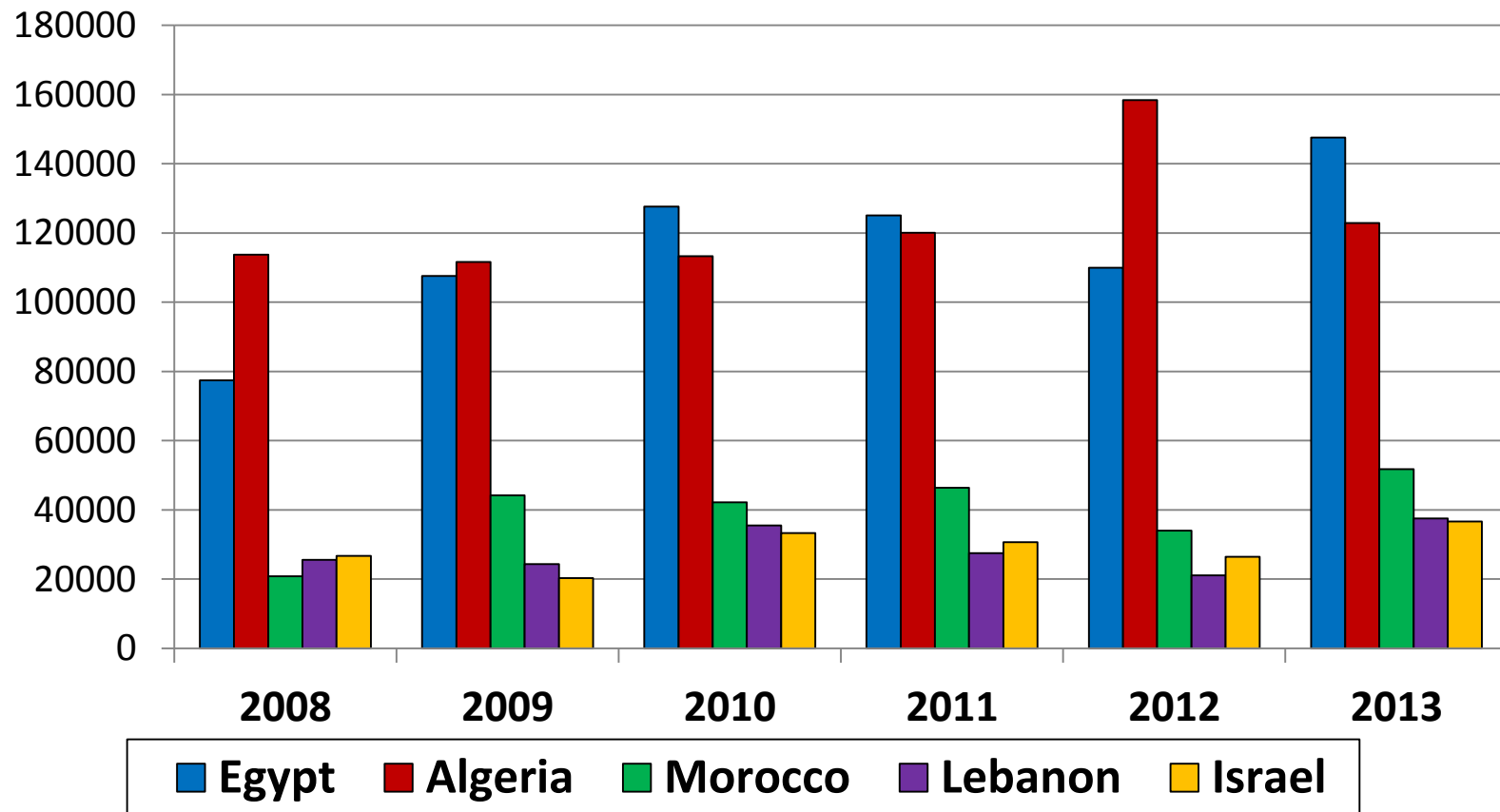


# World and EU seed exports in € million in year to April 2014

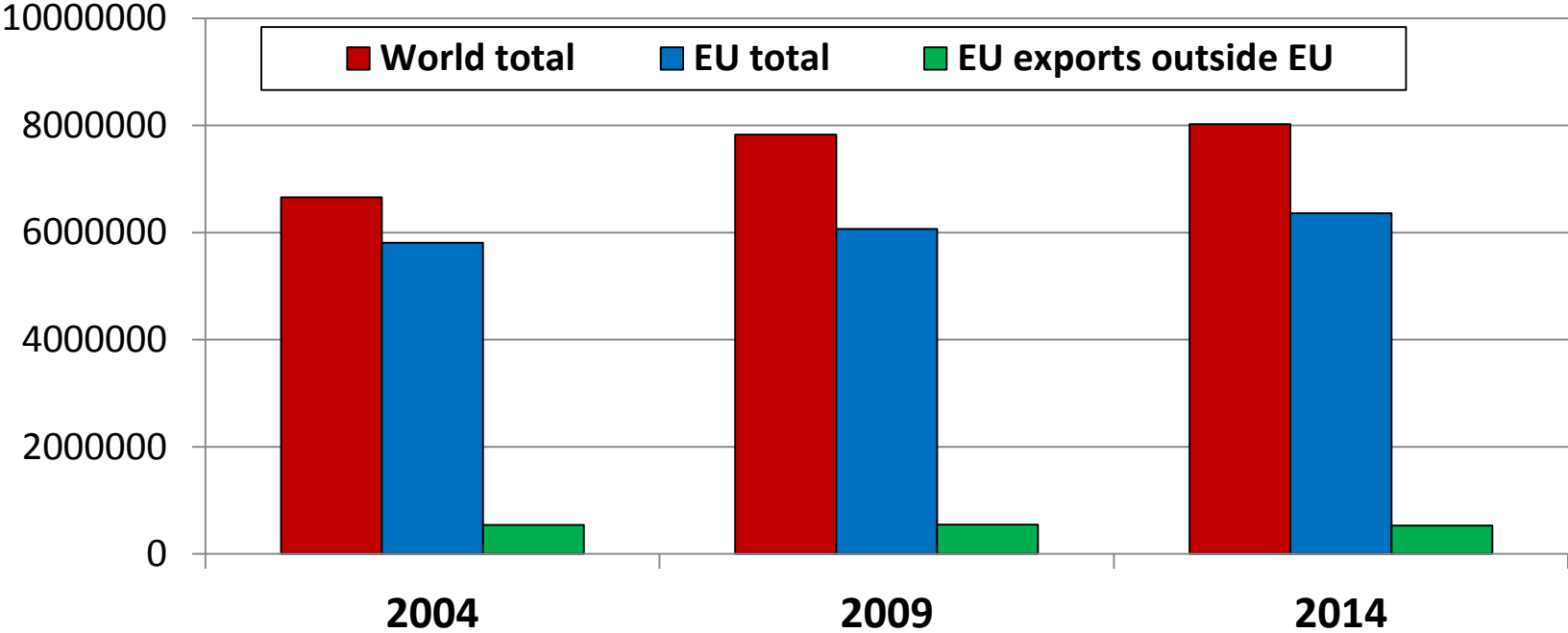


**The EU accounts for 91% of world seed exports by volume with 51.5% of EU sales outside the EU. The Netherlands accounts for 59% of world trade.**

# Main external buyers of EU seed potatoes in tonnes

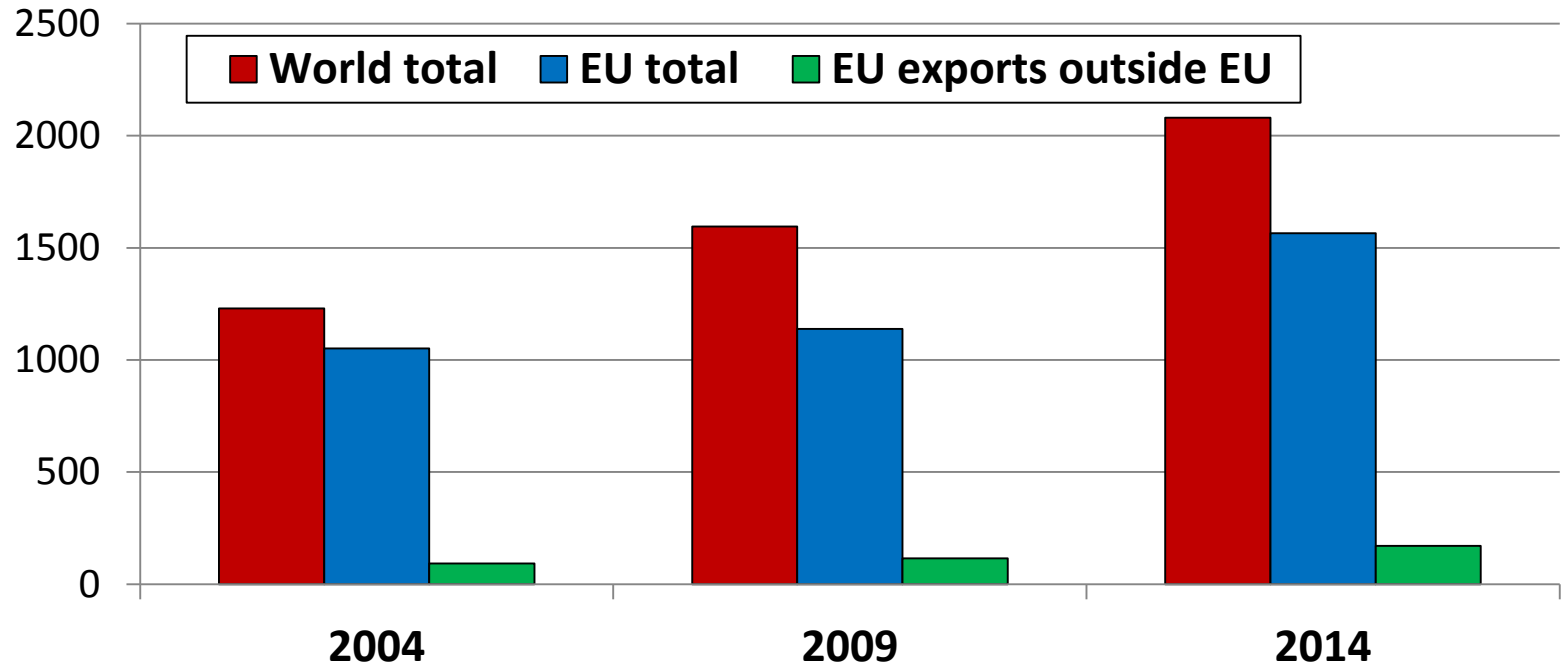


# World and EU ware potato exports in tonnes in year to April



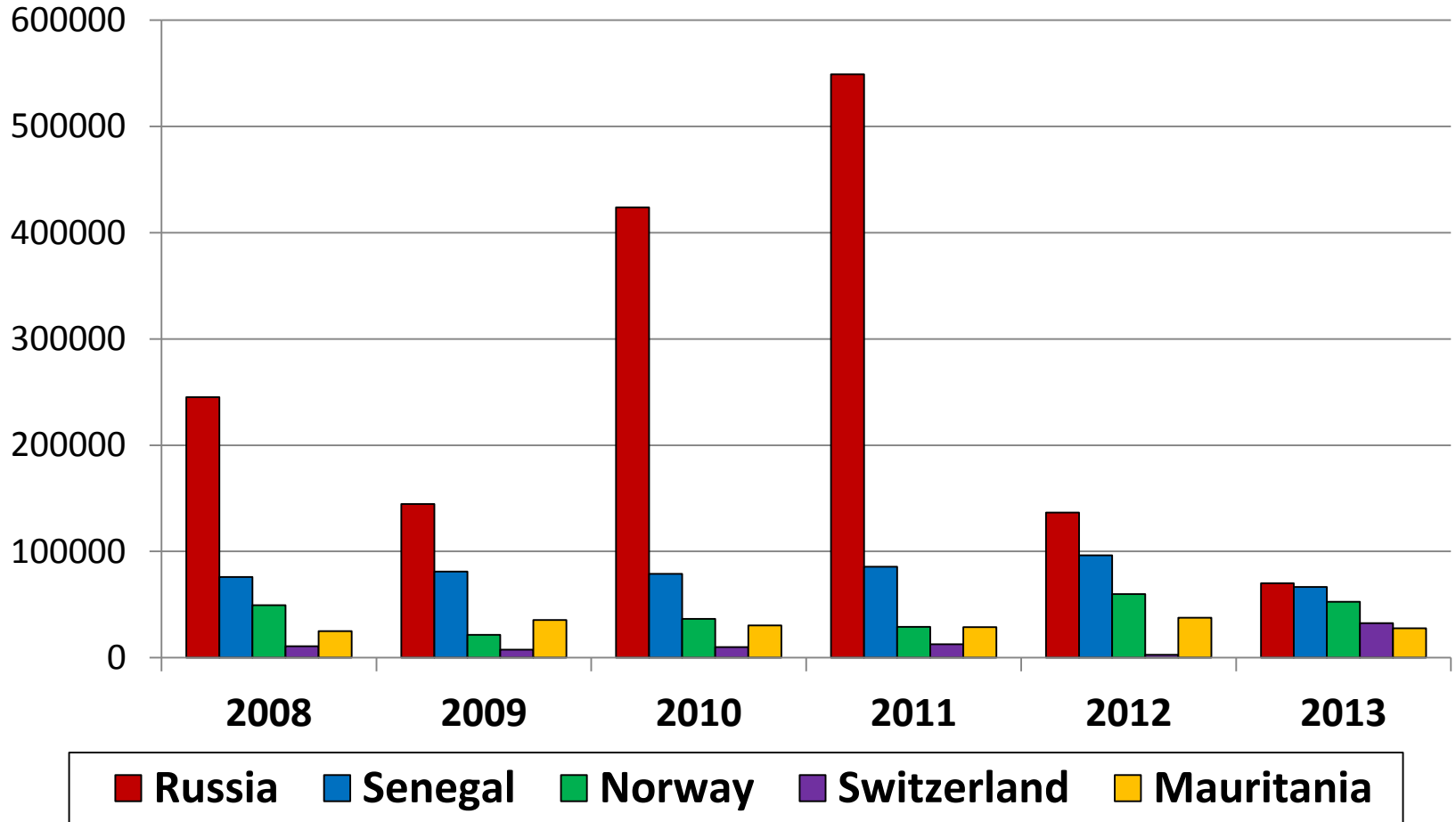
**The EU accounts for 79% of world ware exports by volume with trade up 9.5% since 2004 and 8.3% of EU sales outside the EU.**

# World and EU ware potato exports in € million in year to April

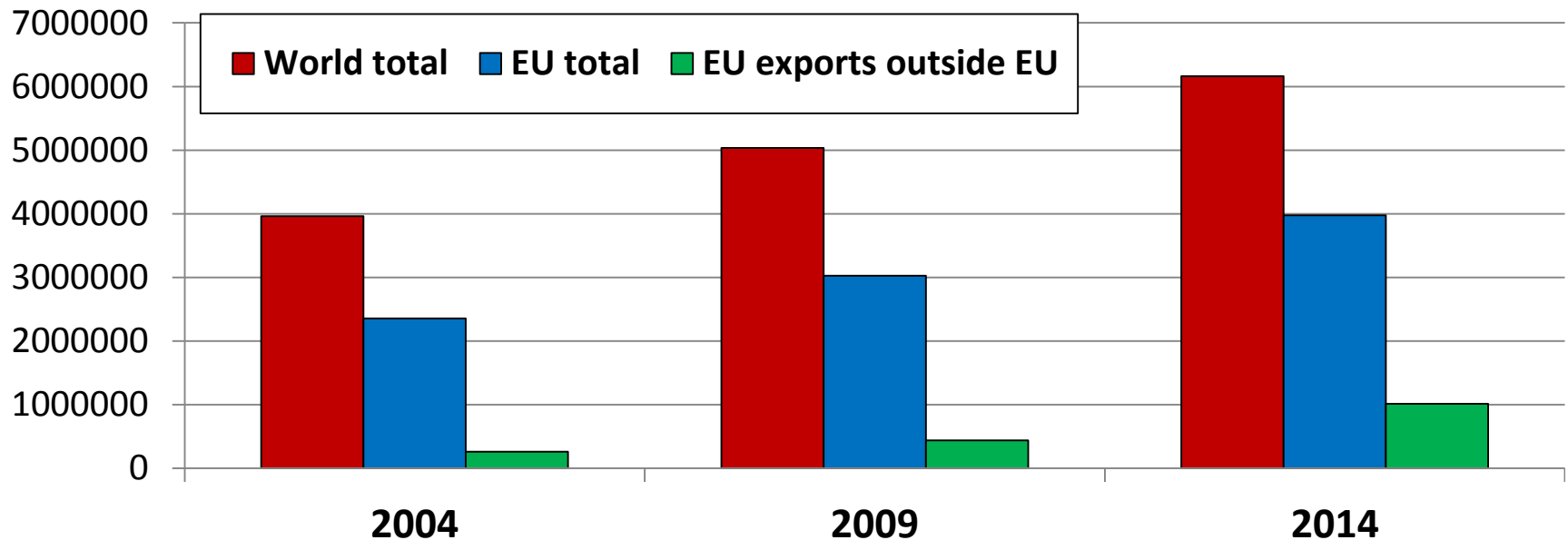


**The EU accounts for 75% of world ware exports by value with trade up 49% since 2004 and 11% of EU sales outside the EU.**

# Main external buyers of EU ware potatoes in tonnes

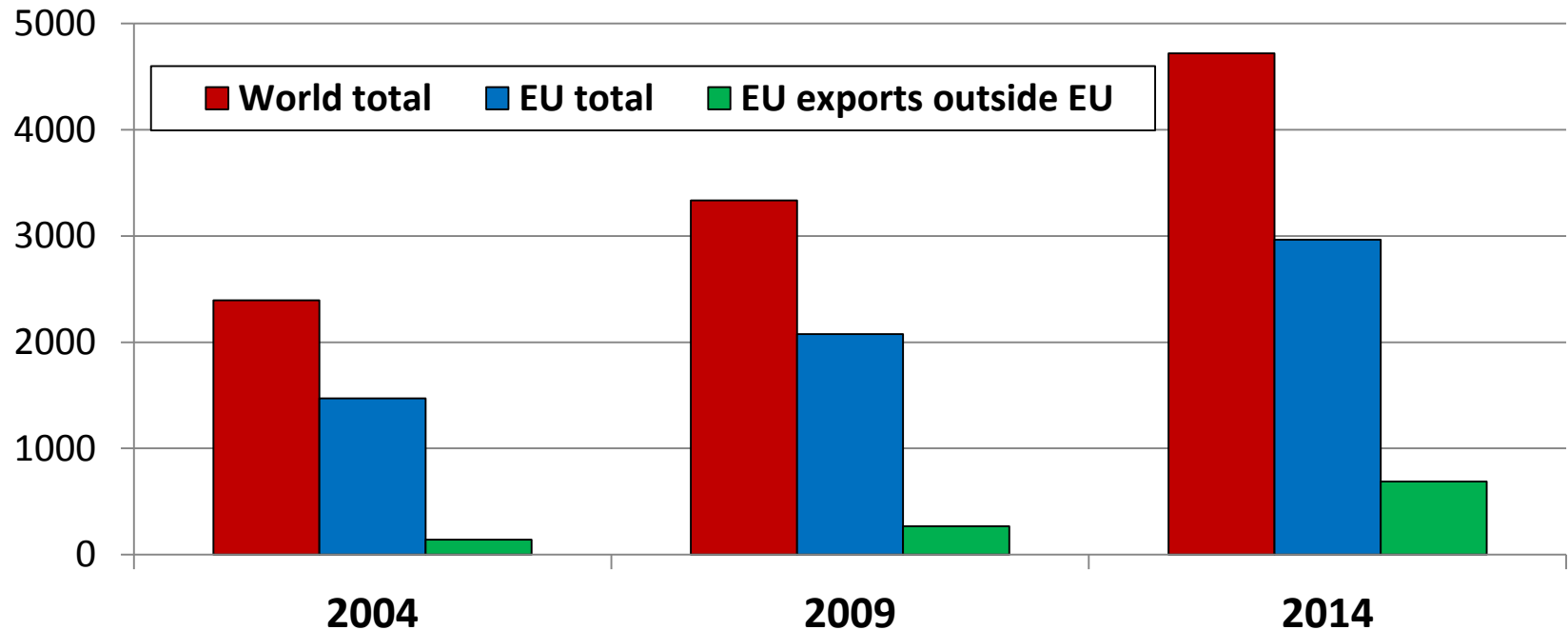


## World and EU fry exports in tonnes in year to April



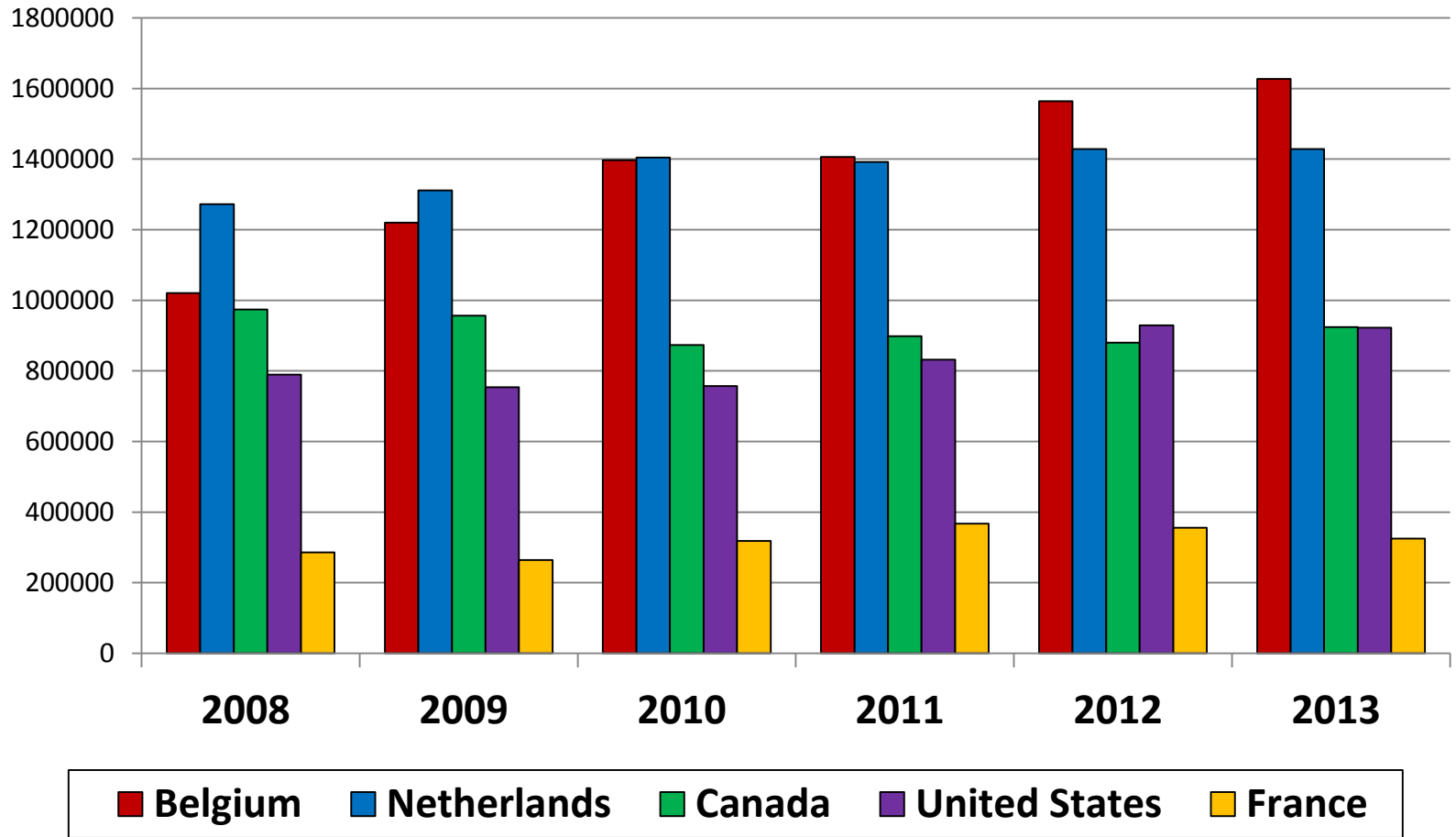
**The EU accounts for 64.5% of world fry exports by volume with trade up 69% since 2004 and 25% of EU sales outside the EU, up from 11% in 2004.**

# World and EU fry exports in € million in year to April



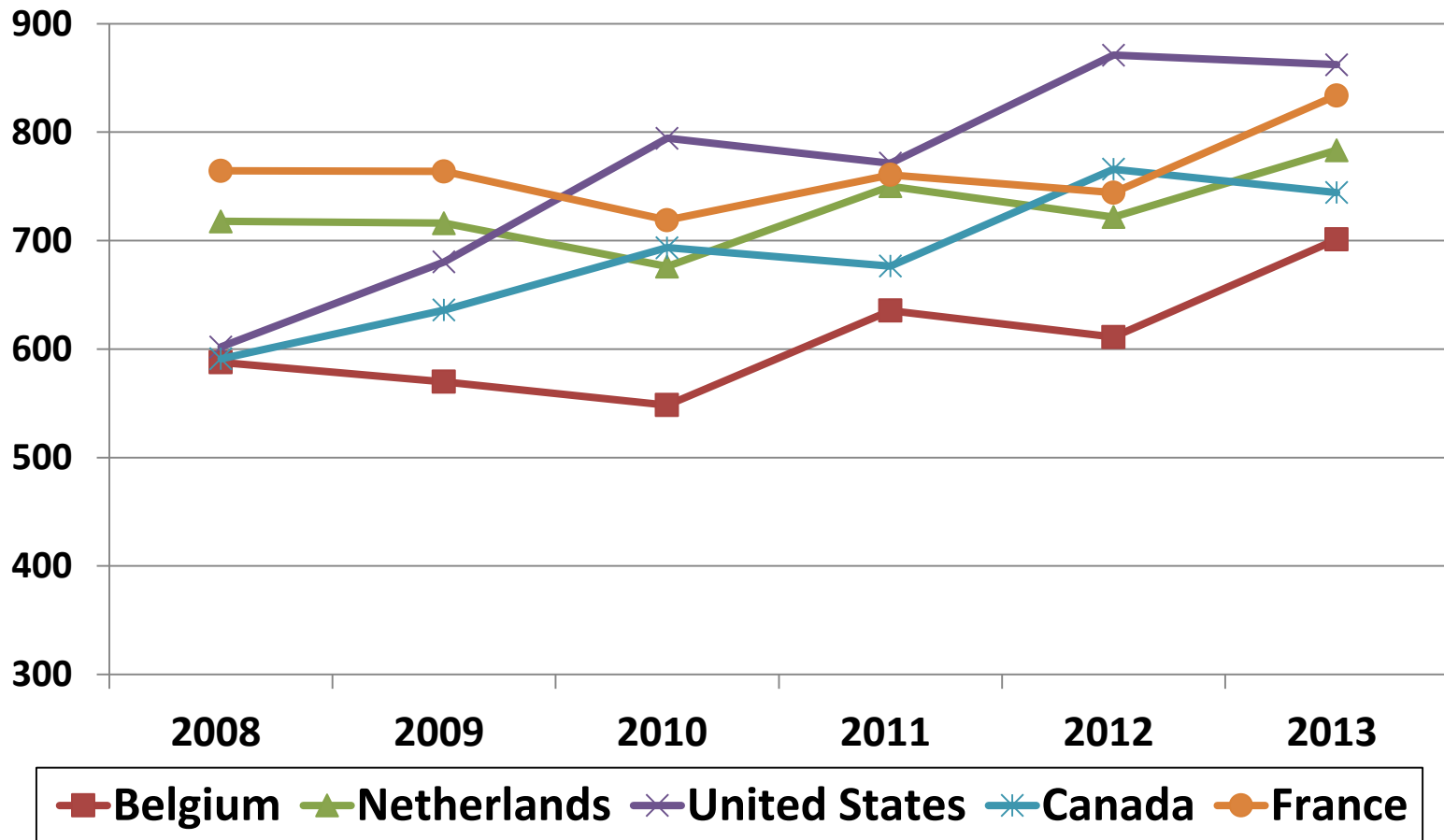
**The EU accounts for 63% of world fry exports by value with trade up 102% since 2004 and 23% of EU sales outside the EU, up from 9% in 2004.**

# World fry exports 2008-13 in tonnes

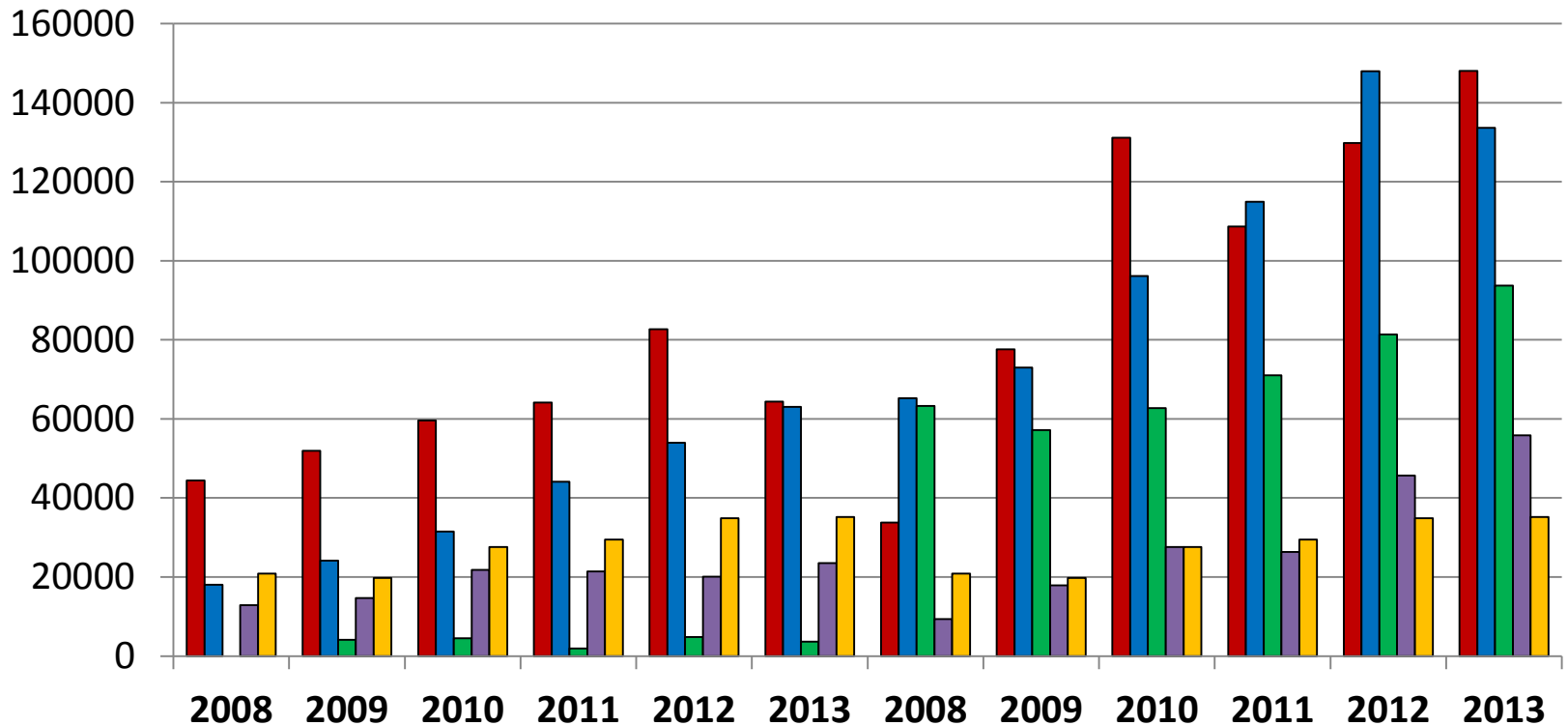




# World fry export prices 2008-13 in €/tonne



# Main EU fry markets outside the EU in tonnes



# Trade bans and restrictions

Aside from the latest ban on Russian imports, the last two years have seen a number of significant trade bans and restrictions:

- **Russia's ban on ware imports from July 2013 due to phytosanitary concerns: in year to July 2013 EU exported 80,000 tonnes of ware to Russia worth €30 million. In year to July 2011 800,000 tonne were exported worth €270 million. In year to April 2014 Russia imported 135,000 tonne of EU potatoes and potato products worth €95 million. Total potato and potato product imports were only worth €775,000.**
- **In July 2013 South Africa imposed a 61% duty on imported fries to protect its own industry. From July 2014 a two year programme of duty at 41% and 21% was introduced. In the year to July 2013 the EU exported 32,000 tonnes to South Africa worth €22.4 million.**
- **In 2012 Brazil banned Argentine fry imports for three months which benefitted European exporters.**
- **Australian and New Zealand potato industry has complained about imports of low priced EU fries**

## Projected potato consumption 2010 to 2050 based on 2011 consumption rates

	2050	2030	2020	2010	% change 2010-2050	% yearly change
<b>World</b>	333.328	294.030	269.315	241.375	+38.1	+0.95
<b>E Europe</b>	27.290	30.422	31.874	32.787	-16.8	-0.42
<b>W Europe</b>	13.242	13.316	13.173	12.886	+2.8	+0.07
<b>N America</b>	25.835	23.355	21.754	20.062	+28.8	+0.72
<b>S America</b>	15.052	13.939	12.950	11.742	+28.2	+0.70
<b>Africa</b>	44.752	30.563	24.537	19.281	+132.1	+3.30
<b>S East Asia</b>	3.780	3.469	3.197	2.866	+31.9	+0.80
<b>W Asia</b>	26.391	16.706	12.946	9.885	+167.0	+4.17

Source: UN Department of Economic & Social Affairs and UN FAOSTAT

## Projected potato consumption in selected countries based on 2011 consumption rates

<b>Belgium</b>	1.277	1.235	1.203	1.159	+3.4	+0.08
<b>UK</b>	7.372	6.918	6.612	6.256	+17.8	+0.45
<b>Netherlands</b>	1.589	1.622	1.599	1.560	+1.8	+0.05
<b>Germany</b>	5.130	5.624	5.789	5.869	-12.6	-0.31
<b>France</b>	3.990	3.776	3.628	3.446	+15.8	+0.39
<b>Poland</b>	3.909	4.295	4.377	4.381	-10.8	-0.27
<b>Russia</b>	13.480	14.891	15.611	16.013	-9.5	-0.47
<b>USA</b>	22.287	20.162	18.792	17.361	+28.4	+0.71
<b>Brazil</b>	4.438	4.277	4.053	3.748	+18.4	+0.46
<b>Japan</b>	2.253	2.509	2.608	2.649	-14.9	-0.37
<b>China</b>	57.061	59.876	59.034	56.025	+1.8	+0.05
<b>India</b>	40.501	36.909	33.833	30.141	+34.4	+0.86
<b>Indonesia</b>	1.350	1.233	1.132	1.011	+33.5	+0.84
<b>Nigeria</b>	1.938	1.202	0.925	0.703	+175.7	+4.39

Source: UN Department of Economic & Social Affairs and UN FAOSTAT

# Conclusions

- **The value of EU potato and potato exports has increased by 72% in the last ten 10 years. The value of fry sales has doubled in that time**
- **The value of EU potato sales outside the EU has increased by 75%**
- **Trade bans and restrictions pose a risk for the EU potato industry**
- **The greatest growth in potato consumption will be outside the EU – Africa, India and parts of Asia**



*Thank you*

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