Euro-Potato

Potato Council business report for Northern Europe

AHDB Agriculture & Horticulture DEVELOPMENT BOARD

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The following articles update on:

- The latest crop situations and market prices of the NEPG (North-Western European Potato Growers) countries.
- Potato plantings by variety in Great Britain for 2013.
- The latest UK import and export data made available by HM Revenue and Customs.
- A new overseas market for seed potatoes.

2013 CROP PROGRESS ACROSS NORTH-WESTERN EUROPE

At the beginning of August there was welcome rain across many of the mainland NEPG countries and crops were generally considered to be growing well. However, by the middle of August more rain was needed as crops in many areas were once again too dry and variable yield digs had been reported. As the month progressed, concerns relating to the lack of rainfall and the potential effect on final yields increased. The dry weather has also hindered lifting in some parts in recent weeks.

Similar to the continent, GB yields have been reported as extremely variable, particularly in early crops. Some non-irrigated crops during August were in need of rain and started to senesce. Others though - typically the irrigated crops - looked very well. Yields of some of the later planted crops were reported to have exceeded earlier expectations with some achieving a high baker content. Crop health generally has been good with samples reported as clean and with only occasional skin blemishes.

In Belgium, at the beginning of August the crop was said to be growing well and putting on weight, however for some of the early crops the rain came too late. Some secondary growth has also been found in a few crops. Recent lifting activity has been reported to be moving on with rain helpful to some of the later crops. According to Fiwap/PCA, trial digs have shown slightly better Bintje yields than the same time last year. However, still below the season-end average of last year and around 5t/ha lower than the five year average for the same time.

In France, Phaff Export Marketing report beneficial rain in recent weeks but crops being extremely variable. Some secondary growth was evident in Bintje during the middle of August, though it was not considered at the time a serious problem. According to AMI, the French Ministry of Agriculture estimate the total potato harvest at 5 million tonnes, an increase of 11% compared with last year and above the five year average. The increase is mainly due to a 6% rise in planted area.

In the Netherlands, VTA trial digs have shown an average yield of 39t/ha, compared to 46t/ha last year and 19% lower than the five year average. Phaff Export Marketing report that there hasn't been enough rain and fields have been too dry for lifting. Overall the harvest is expected to be lower than last season with the exception of some regions and in fields where irrigation has been available. Some later varieties though still have growth potential. While typically the harvest doesn't commence until September, there has been a very small amount of activity taking place and considerable burning off, including some crops for export.

In Germany, according to Phaff Export Marketing, yield estimations have varied greatly across the country from typically low in Bavaria to average in the West. Dry field conditions as August progressed made some harvest activity challenging. By the end of August the early crop harvest was reported to be complete and the main crop harvest is now underway, though some growers are busy with the cereal harvest.

NEPG MARKET UPDATE

In Belgium, Fiwap/PCA early processing varieties (35mm+) for the week ending 30 August were £101-£115/t. Phaff Export Marketing report the market as being quiet with very little export activity and processors still largely using contracted supplies with very little free-buy movement.

In France, processing crop pricing information is not yet available. UNPT report that most trade has been on contract with little free-buy activity. Phaff Export Marketing have since reported an upcoming demand from the processing sector who have started to look at sourcing free-buy material.

According to UNPT the 2012-2013 season-end was mixed. Prices were maintained at a peak for many months, similar to 2010-2011. The tonnage exported though remained at the low level seen the previous year. In particular, exports to major southern European countries (Spain, Italy, Portugal) were down 25% on average (CNIPT-Customs), mainly due to competition from Italy.

In the Netherlands, while processing crop pricing information is not yet available, Phaff Export Marketing report the export of fresh potatoes as a considerable market driver.

According to the NAO, during July there was significantly lower use of potatoes for processing. A reported 189,000 tonnes were used, 83,000 tonnes less than June 2013. The total use of raw material during the whole 2012/13 season was 3.42 million tonnes, which was less than the season before (3.54 million tonnes).

In Germany, REKA early processing prices for the week ending 30 August were £111-£120/t for 40mm+. Phaff Export Marketing report that with the delay in harvest due to recent dry conditions, supply and demand have been in balance. This was with the exception of Bavaria who have been sourcing from other parts of the country. An increased processing demand has been anticipated as factories run at full speed.

According to AMI, in July 2013 German households bought around 13% less potatoes than in the same month last year and 2% less than in June 2013. This was due to the high price of potatoes, the usual seasonal decline in demand around the holiday period and some above average temperatures. Of the c. 95,000 tonnes of potatoes sold, c. 28,700 tonnes (30%) were of foreign origin. Due to the tight supply situation, significantly more potatoes from Egypt and Israel were sold compared to the previous year. Sales of Egyptian potatoes doubled to more than 6,000 tonnes, while the sales of Israeli potatoes increased by almost 3,000 tonnes to 8,200 tonnes.

POTATO PLANTINGS BY VARIETY IN GREAT BRITAIN FOR 2013

The AHDB/Potato Council has now produced provisional estimates of planted areas by variety for England, Scotland and Wales for 2013. These are shown in Table 1 following, with comparisons to previous years from 2008-2012. The total planted area for Great Britain is now estimated at **122,200 ha**. This revises the end-June provisional estimate of 121,200 ha and is based on a sample of 2,129 growers representing 87% of registered area. The new 2013 area estimate is still very similar to plantings in 2012.

Table 1 shows the prevalent varieties in Great Britain. The multipurpose variety M Piper remains the dominant variety, accounting for 15% of the planted area and used mainly for pre-packing but also in the fresh-chipping and processing trade. While there has been some change to the rankings of the top five, the varieties themselves are unchanged from last year and account for 35% of total plantings in 2013. M Piper has seen a 26% fall in area since 2008 and Estima, over the same period, has lost 66% of its planted area.

Varieties moving up the rankings in the last five years have included Markies (up 8 places from 2008 to 2nd), Melody (up 15 places to 6th), Agria (up 33 places to 14th), Fontane (up 18 places to 15th) and Innovator (up 21 places to 20th). The biggest fallers have been Saturna (down 19 places to 27th), Premiere (down 17 places to 32nd), Nadine (down 31 places to 45th) and Victoria (down 23 places to 49th).

New varieties have also entered the top 50 with varieties not included in 2008 making up 6% of the 2013 planted area (including Ramos, Challenger, Sylvana, VR 808, Royal, Electra, Gemson, Linton, and Casablanca).

Table 1 : GB Plantings by Variety 2008-2013

Areas in hectares. 2013 estimates are provisional as at end-August 2013 and will be revised in January 2014.

Rank order	Variety	2008	2009	2010	2011	2012	2013			
							England	*Scotland*	*Wales*	*Total ‡*
1	Maris Piper	25,182	23,574	22,935	20,780	19,303	13,755	4,829	59	**18,643**
2	Markies	4,012	6,257	7,132	7,415	7,520	6,271	†	†	**6,748**
3	Maris Peer	5,964	6,175	5,881	5,669	6,480	4,877	1,715	46	**6,638**
4	Lady Rosetta	5,664	6,922	6,831	6,764	6,526	5,681	320	–	**6,001**
5	Estima	13,260	10,483	8,723	7,954	5,958	3,954	383	107	**4,443**
6	Melody	1,568	2,559	3,842	4,534	3,747	3,988	63	65	**4,116**
7	Harmony	3,023	3,972	3,966	3,656	3,781	2,600	1,259	27	**3,886**
8	Marfona	5,106	4,832	4,180	4,369	3,385	3,155	339	74	**3,568**
9	Hermes	4,061	4,021	4,107	4,778	4,580	1,823	1,338	–	**3,161**
10	King Edward	3,496	3,377	3,160	3,103	2,817	2,326	644	41	**3,011**
11	Desiree	3,624	3,354	3,167	3,012	2,802	1,823	820	24	**2,667**
12	Pentland Dell	4,240	3,229	3,056	2,925	3,140	2,179	347	–	**2,525**
13	Rooster	1,723	2,529	2,710	1,841	1,771	323	1,741	–	**2,064**
14	Agria	311	433	766	1,048	1,170	†	†	–	**2,054**
15	Fontane	657	935	1,538	2,121	2,100	1,968	†	†	**2,022**
16	Charlotte	1,907	2,046	1,973	2,036	1,996	1,311	†	†	**1,850**
17	Cabaret	1,512	1,985	1,945	2,078	1,902	1,535	238	–	**1,773**
18	Russet Burbank	1,714	1,453	1,671	1,809	1,864	1,592	156	–	**1,747**
19	Saxon	4,188	4,162	3,261	2,821	2,040	684	1,051	–	**1,735**
20	Innovator	372	739	1,282	1,401	1,295	1,529	147	–	**1,676**
21	Cultra	1,625	1,630	1,167	1,367	1,425	23	1,598	–	**1,622**
22	Osprey	1,671	1,634	1,461	1,578	1,664	†	†	–	**1,599**
23	Wilja	1,506	1,381	1,319	1,154	1,138	937	286	12	**1,235**
24	Ramos	–	–	†	666	777	1,077	†	†	**1,127**
25	Sagitta	†	68	192	375	674	1,047	51	–	**1,098**
26	Challenger	–	–	–	452	735	†	†	–	**1,082**
27	Saturna	4,115	3,539	3,578	3,241	2,449	907	163	–	**1,070**
28	Sylvana	–	–	†	621	814	824	236	–	**1,059**
29	Shepody	920	1,015	1,047	1,047	979	853	126	–	**979**
30	Nectar	27	46	135	376	605	880	†	†	**966**
31	Accord	1,133	1,470	1,197	1,023	950	899	†	†	**931**
32	Premiere	2,124	2,173	1,699	1,444	1,226	796	75	35	**906**
33	Lady Claire	626	633	1,025	937	1,076	†	†	–	**877**
34	Vivaldi	1,016	733	553	756	667	466	360	–	**826**
35	Amora	107	187	369	485	774	772	25	9	**805**
36	VR 808	–	–	–	67	161	757	†	†	**791**
37	Maris Bard	1,206	1,063	867	996	841	714	†	†	**754**
38	Royal	–	–	†	194	393	643	47	–	**690**
39	Mozart	170	284	313	369	538	†	†	–	**588**
40	Electra	–	–	–	89	330	487	63	21	**571**
41	Valor	469	514	511	436	455	†	454	†	**570**
42	Saphire	†	119	242	358	328	495	†	†	**527**
43	Vales Sovereign	409	803	729	804	835	273	230	–	**503**
44	Gemson	–	20	48	197	289	284	178	27	**488**
45	Nadine	2,306	1,664	946	837	588	406	†	†	**487**
46	Sassy	203	268	338	483	613	456	†	†	**484**
47	Linton	–	–	–	–	137	475	–	–	**475**
48	Casablanca	–	–	–	557	418	287	176	11	**474**
49	Victoria	1,178	1,236	948	804	455	454	†	†	**461**
50	Cara	618	607	458	462	482	172	280	–	**451**
Sub-total ‡		**113,047**	**114,125**	**111,307**	**112,284**	**106,993**	**81,509**	**22,637**	**681**	**104,827**
Other varieties		17,187	16,106	15,580	16,149	14,830	12,879	4,065	452	17,396
Total ‡		**130,234**	**130,231**	**126,887**	**128,433**	**121,823**	**94,388**	**26,702**	**1,133**	**122,223**

† Unable to publish figure without risk of disclosure of data relating to individual farms. This is when the data relates to 3 or fewer growers. Where the estimate for a variety in a region has been removed, the region with the second largest area has also been removed due to the GB total figure also being presented.

– No area planted

‡ Totals may not tally exactly due to rounding

LATEST HMRC TRADE DATA

Table 2: UK imports and exports

	June 2012	June 2013
EXPORTS		
Seed	21,000	1,000
Fresh	10,000	12,000
Processed (in raw equiv.)	22,000	15,000
Total exports	**53,000**	**28,000**
IMPORTS		
Seed	1,000	1,000
Fresh	31,000	96,000
Processed (in raw equiv.)	117,000	117,000
Total Imports	**149,000**	**215,000**

Source: HMR&C. Figures to the nearest thousand.

Imports: According to HMR&C, the UK imported just under 215,000 tonnes in June 2013. These latest figures exceed volumes recorded last season at the same time, where in June 2012, 149,000 tonnes of imports were reported in the month (up 44% in June 2013 compared with June 2012).

In these latest figures, processed imports in June continued to account for the majority of trade and in volume terms were comparable this year with last. Seed imports totalled 1,200 tonnes, up from the same month last year. The increase in fresh imports was significant, up from 31,000 tonnes last June to 96,000 tonnes in June 2013. The change in fresh imports accounted for the majority of the increase in UK total import activity in June compared with last June. The heightened level of fresh imports continued to reflect the trend seen throughout most of the 2012 crop year, where activity supplemented the smaller domestic crop.

Exports: Total exports in June 2013 were up slightly on the previous month at just under 28,000 tonnes (27,000 tonnes in May). This was despite a continuing decline in seed exports of around 1,800 tonnes from May.

Total exports during the month at just under 28,000 tonnes were lower than last season's equivalent period (25,000 tonnes less) when exports reached 53,500 tonnes. The difference in trade between this year and last was largely due to a decrease in seed exports. Last year, in excess of 20,000 tonnes of seed were exported to non-EU countries. This level of activity in June last year was due to late season seed movements. In June 2013, the volume to non-EU destinations was at a more typical level, at under 100 tonnes. Fresh exports were comparable in June 2013 to 2012 and processed exports (in raw potato equiv.) were similar in terms of EU processed exports. The level of processed exports to non-EU countries however in June 2013 (at 4,000 tonnes) did not reach the level seen last year when they totalled just over 10,000 tonnes.

NEW OVERSEAS MARKET FOR SEED POTATOES

On-going communications with Vietnam officials by Potato Council and SASA, to discuss seed potato importation requirements, has resulted in the seal of approval for the official importation protocol between Vietnamese and GB authorities, allowing GB seed potatoes to be imported into Vietnam for the first time.

Liaison with this new, Far-Eastern market has been on-going for some time. Robert Burns, Head of Seed and Export for Potato Council and Dr Triona Davey, Plant Health Liaison for SASA (Scottish Government) have been communicating with Vietnamese officials for many months, advising and informing on specific phytosanitary conditions and the production of seed from GB, and emphasising the benefits that GB seed potatoes can offer the Vietnamese growers and supply chain.

Mr Burns said "The outward mission by Potato Council and SASA to Hanoi earlier this year led to the finalisation recently of the importation agreement between GB and Vietnam – which is now signed – and we are absolutely delighted that this important new market is now accessible for GB's seed growers and exporters."

Vietnamese officials are due to visit Potato Council and SASA in September to observe GB seed production at first hand, and will meet Potato Council and SASA plant health teams, visit micro-propagation laboratories and mini-tuber production facilities and view this season's seed crops in-situ.

You will be able to meet Potato Council's and SASA's seed potato teams, together with GB's leading seed breeders, exporters and crop researchers, at the forthcoming Potato Europe event, 11-12 September, Emmeloord, The Netherlands. www.potato.org.uk/events and www.potatoeurope.com for more information.

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