

Monday 11th July 2011

POTATO MARKETS AT A GLANCE

2011 Crop Weekly Average Price Survey (WAPS)

PCL Weekly Average Price quotations for the 2011 maincrop season will commence as soon as the volume of survey forms becomes sufficient to calculate statistically accurate prices.

EARLY CROP REPORTING SERVICE

For the latest news on GB crops, harvest progress and prices from May to the end of July call:
0844 993 6104.
(Calls cost 5p per minute).

| FRESH IMPORTS * | |
|-------------------------------|-----------|
| Imported in April 2011 | 47,000 t |
| Imported in April 2010 | 37,500 t |
| Total Imports (Jul.10-Apr.11) | 168,000 t |
| Total Imports (Jul.09-Apr.10) | 153,500 t |

* Latest UK data published by HM Revenue & Customs on 13.06.2011. Export data are unavailable at the time of publishing.

BAKERS (65mm +)

In the East Estima bakers are £240-£260/t.

In the West Herefordshire Estima are in a range of £210-£240/t depending on skin finish.

| GB Weekly Average Prices - (£/t) | 17 Jun | 24 Jun | 01 Jul | 08 Jul | Trend |
|---|---------|---------|---------|---------|-------|
| GB Weekly Average Price, 2010 Crop | 166.57 | 168.96 | NA | NA | - |
| (% change) | -4.0% | +1.4% | - | - | - |
| GB Weekly Free-buy Price, 2010 Crop | 166.03 | 165.04 | NA | NA | - |
| (% change) | -5.0% | -0.6% | - | - | - |
| Futures Market Comparisons - (£/t) | | | | | |
| Eurex Futures European Proc (For Apr '12) | 116.50 | 130.62 | 117.65 | 119.69 | ▲ |
| Eurex Futures European Proc in 2010 (For Apr '11) | 121.06 | 132.60 | 148.81 | 162.11 | ▲ |
| NEPG European Price Comparison - (£/t) | | | | | |
| The Netherlands (Proc 40mm+ Maincrop Source VTA) | 175-218 | 99-151 | 91-145 | NA | - |
| Germany (New Crop Proc 35mm+ Source REKA) | NA | 124-142 | 100-118 | 98-103 | ▼ |
| France (New Crop Proc 35mm+ Source SNM/UNPT) | NA | NA | NA | NA | - |
| Belgium (New Crop Proc 35mm+ Bintje Source Fiwap/PCA) | NA | NA | 113-122 | 112-121 | - |
| Belgium (New Crop 35mm+ Belgapom Bintje Average) | NA | 114 | 106 | 89 | ▼ |

Note: Following discussions with the PCL Market Information Committee we have decided not to publish Eurex Futures prices for London if there are no trades within a given week.

2011 NEW CROP (Prices free market ex farm £/t)

PACKING

In the South movement is improving as more supermarket promotions take place, particularly for smalls. **In the South West** free-buy 42mm down are from £150/t and 42mm up are £80-£100/t. **In the South East** non set-skin wholecrop Marfona with high baker content is £175/t and some 42mm down Carlingford is £270/t. **In Suffolk and Essex** wholecrop packing Marfona is from £140/t for loose skin, £150-£160/t for semi-set, up to £200/t for the best set-skin, with bakers only samples reaching £240/t. M Piper is £180/t for best packing samples. Salad varieties range from £100-£130/t for ware fractions, smaller fractions of M Peer are £200-£220/t, Charlotte up to £260/t and small specialist fractions up to £300/t.

In Lincolnshire loose skin wholecrop Marfona is £130-£150/t for semi-set packing sample. **In Yorkshire** there is light movement of loose-skin Marfona, which is mainly on contract. **In Shropshire** most packers have yet to switch to the new crop, although set-skin wholecrop Marfona started to move at £180-£200/t. **In Herefordshire** steady movement of wholecrop M Peer for split grading continue with price eased a little to £200/t. **In Wales** wholecrop L Christl, M Peer and Gemson for multi-split grading are unchanged at £200-£245/t depending on the 'small's' content. Samples of 42mm down Gemson for a supermarket promotion are £280/t. **In Scotland** some M Peer, Casablanca, Carlingford have being moved on contract for salads, baby new and local sales.

BAGS

In the South West there are more than adequate supplies for a slow demand with prices under pressure. Ware supplies (mainly M Peer) are £80-£100/t and frying quality Accord and Premiere are £110-£120/t, with some as high as £140/t. **In the South East** trade is slow with ware supplies (mainly M Bard and P Javelin) £100-£120/t and frying Accord and Premiere are £120-£140/t, occasionally £150/t for local sales. **In Shropshire** loading is at a high level with supplies often in excess of demand, putting further pressure on prices. Chipping samples of Accord, Amora

and Premiere are mainly £120-£125/t, with some at £130/t for local sales. Some Accord and Fambo for chipping are moved to N Ireland at £130/t in 25kg bags. **In Cheshire** prices have eased in line with other areas with good chipping samples of Accord and Premiere mainly at £120-£125/t, with some at £130/t. **In Suffolk and Essex** some M Bard, Accord and Premiere are from £100/t, mostly £120/t and a few at £140 for repeat orders. M Piper is trading at a wide range from £150/t, mostly £170/t and up to £200/t. **In Lincolnshire** M Bard, Premiere, Fambo, Sagitta and Accord are mostly £100-£120/t up to £130/t on repeat orders. **In Yorkshire** frying samples of M Bard, Premiere and Accord are £120-£130/t up to £140/t for local sales and odd Marfona ware is £140/t. **In Lancashire** small volumes of M Bard in bags are £120-£140/t for local sales and smaller salads fractions samples at £240/t. **In Pembrokeshire** the movement of Accord, Amora and Premiere for chipping are £120/t up to £130/t to local outlets. **On Anglesey** the chipping supplies of Casablanca and Premiere are in balance at £125/t up to £150/t for local sales. **In Scotland** Epicure, Rocket and Casablanca have eased to £200-£240/t with a premium for local sales.

PROCESSING

In Cornwall and the **Isle of Wight** contract loads of L Rosetta for crisping are increasing. The crops have had dry matters of mainly 21-22%. Some poor quality M Peer for peeling at £60/t. Shepody is expected to be lifted on the Isle of Wight next week. **In the West Midlands** new crop supplies have increased with prices eased to £100-£120/t for Premiere, and £100/t for Accord. **In the East** Premiere, M Bard and Accord have eased to £100/t.

2011/12 CROP DEVELOPMENT

Total early crop harvested to 8th July was estimated at 3,468 ha, and movement of 97,184t (28.0t/ha), which compares with 2,981 ha and movement of 64,041 t (21.5t/ha) in the same week last year, and 3,205 ha and movement of 84,241 t (26.3t/ha) in 2009.

Most areas had rain or showers over the last week, which has had a beneficial affect on crops. Growing conditions are generally good with showers and sunshine expected this week.

In the South crops have been responding well to the rain and showers. In parts of the **South East**, where there has not been significant rainfall, crops have been stressed where irrigation has not been possible. Growers are defoliating crops to keep size down and some crops have being burnt-off. Yields are generally between 35-45t/ha. **In Suffolk and Essex** growing conditions are very good and ahead of last year, as a result yields are higher with some maincrop already reported to be over 50t/h with the risk of some tubers becoming too big. **In Lincolnshire** crop development continued to make very good progress. Loose skin packing crops were being lifted mainly Marfona and Carlita. Most crops yields are above average for this time of year. Some varieties such as M Piper, Premiere, Sagitta and Fambo were available much earlier than last year due to an early start of the season, with yields between 35-50t/ha and reported up to 60t/ha. **In Yorkshire** crop progress is also ahead of last year, with some early bakers already burnt off. Yields are varying depending on frost and drought affect but still above average at 35-48t/h. **In Lancashire** lifting is light, mostly of salad size samples to local sales as demand for bag was limited by heavy volumes available from Cheshire. **In the West Midlands and Wales** crops continued to make progress which is well ahead of last year. Marfona and other early baker crops have been burnt off for set-skin and wholecrop lifting. Most early crops for packing have been defoliated to minimise oversize tubers. Crops currently being harvested **in Shropshire and Cheshire** have yields in a wide range of 30-50t/ha with some low tuber counts giving very bold samples. There is improvement in dry matter development, particularly Premiere, which is expected to be utilised for processing from next week onwards. **In Pembrokeshire** yields are in a range of 34-50t/ha. **In Scotland** crops continue to progress well due to the last week's sunshine and showers. Some heavy showers interrupted lifting in some areas, with most lifting was on light soil in Ayrshire and East Lothian. M Peer, Epicure, Casablanca, Rocket, P Javelin are yielding at 25t/ha, mainly from crops that had suffered from frost or wind damage earlier in the season. Carlingford for salads have had yields up to 32t/ha.

NOMINATIONS SOUGHT FOR PRESTIGIOUS POTATO INDUSTRY AWARD

The **British Potato Industry Award** is presented each year to an individual recognised for their outstanding contribution to the GB potato industry. Nominations for the 2011 award must be submitted to the award committee secretary **before 31 July 2011**. Forms can be requested from **Margaret Skinner**, British Potato Industry Award, Potato Council, Rural Centre, West Mains, Newbridge, Midlothian, EH28 8NZ. Email: bpindustryaward@potato.org.uk Tel: 0131 472 4064 Fax: 0131 472 4065

2010 CROP PACKING (Prices free market ex farm £/t)

In England:

Estima grade 1 at £180-200/t and demand for general pack material is steady from £130/t, mainly £160-£170/t with mediums at £120/t and value pack is limited at £90/t.

K Edward a few top samples from the Eastern counties are £235/t.

Whites old crop whites are still being utilised mainly for general pack, with Harmony and Saxon at £130-£150/t.

M Piper top samples from the Eastern counties are £180/t and general pack are £130/t.

In Wales the movement of Pembrokeshire supplies to Welsh supermarkets are steady at unchanged prices. Grade 1 Estima and Melody remained at £215-£225/t, M Piper at £240/t. Limited K Edward and Desiree moved at £210-£230/t depending on quality.

In Scotland sufficient stocks are available, with prices for general pack including M Piper at £130/t, Saxon and Cultra at £110-£120/t.

2010 CROP BAGS (Prices free market ex farm £/t)

Most merchants are now using new crop supplies, although small volume of old crop continue to be traded.

A few bold frying samples (mainly M Piper) are £150-£160/t.

Demand for old crop washed remains steady with prices unchanged at £220/t for Desiree and £260/t for Harmony. **In Scotland** light volumes of Saxon were traded at £150/t.

2010 CROP PROCESSING (Prices free market ex farm £/t)

Processors continue to clear the old crop mainly contracted stocks with some white varieties with high dry matter at £110/t and K Edward for peeling at £85/t. **In Scotland** odd loads of Saxon and M Piper are £90/t.

WHOLESALE MARKETS

Bakers - Prices are unchanged on last week. Whites are still £7.50-£8.00, M Piper is £8.00-£8.80 and Reds are £13.50-£14.00, all per 25kg.

New crop 2011

Ware supply has been generally light to meet a slow demand. The first select washed Marfona are £9.50, washed M Bard is £7.00 and unwashed samples are unchanged at £5.50 with odd £6.60 for 25kg. The first new M Piper is £7.00

for 25kg. A wide range of well graded `small` samples are available selling at unchanged prices mainly charlotte from Cornwall and M Peer from Eastern counties at £5.00-£5.50 for 10kg.

IMPORTS

French Very light arrivals of fresh Spunta at £12.00 in 25kg hessian sacks, the supply of other varieties remain very short at £6.00 for 10kg.

Cyprus Adequate stocks Spunta are unchanged at £9.00 for 20kg.

Jersey Royal Lighter stocks but adequate, ware are still £4.95 for 15kg (£0.15/lb) and Mids are £3.30-£4.40 for 10kg (£0.15-£0.20/lb).

Israel Fresh arrivals of 35x45mm Charlotte are £5.00-£6.00 for 10kg.

| GB ex farm prices (£/t) - 2010 crop | | | | | | | |
|-------------------------------------|-----------|------|------|-----------|------|------|------------|
| Packing | w/e 08/07 | | | w/e 01/07 | | | |
| Grade 1 | Low | Main | High | Low | Main | High | Main Trend |
| K Edward | £210 | £230 | £235 | £210 | £220 | £230 | ▲ |
| Reds | £210 | £220 | £230 | £185 | £205 | £230 | ▲ |
| M Piper | £180 | £210 | £240 | £180 | £210 | £240 | ▶ |
| Estima | £180 | £205 | £225 | £180 | £200 | £225 | ▲ |
| Other Whites | £215 | £220 | £225 | £180 | £195 | £225 | ▲ |
| Bakers Graded | £210 | £235 | £260 | £210 | £235 | £260 | ▶ |
| Secondary Pack | Low | Main | High | Low | Main | High | Main Trend |
| M Piper | £130 | £130 | £130 | £160 | £160 | £160 | ▼ |
| Estima | £90 | £130 | £170 | £90 | £130 | £170 | ▶ |
| Other Whites | £110 | £130 | £150 | £100 | £130 | £160 | ▶ |
| Bags | w/e 08/07 | | | w/e 01/07 | | | |
| General Ware/Frying | Low | Main | High | Low | Main | High | Main Trend |
| M Piper | £150 | £155 | £160 | £160 | £170 | £180 | ▼ |
| Ware - Other varieties | £150 | £150 | £150 | £100 | £130 | £160 | ▲ |

| Wholesale Markets-2010 Crop Prices out of market w/e 8th July 2011 | | | | | |
|--|--------|------|-------------|------------------------|---|
| Variety | Weight | Ware | Select | Washed | |
| King Edward | 25 kg | - | £7.00-£7.50 | - | ▼ |
| Reds | 25 kg | - | - | £8.50 odd £9.00 | ▲ |
| Maris Piper | 25 kg | - | - | £7.50-£8.00 | ▲ |
| Whites | 25 kg | - | - | £7.00, odd £8.50-£9.50 | ▶ |
| Boxed Bakers 40's | 15 kg | - | - | £7.50-£9.00, odd £9.50 | ▶ |
| Boxed Bakers 50's | 15 kg | - | - | £7.00-£8.00, odd £8.50 | ▶ |
| Boxed Bakers 60's | 15 kg | - | - | £6.50-£7.00, odd £7.50 | ▶ |