

Monday 18th 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.

**Your Opportunity to "Have Your Say" on Research & Development**

We would welcome your views on future research activities that are important for both the potato industry as a whole and the business with which you are involved. To start the survey visit:  
<http://pcrdhaveyoursay2011.questionpro.com/>

GB Weekly Average Prices - (£/t)	24 Jun	01 Jul	08 Jul	15 Jul	Trend
GB Weekly Average Price, 2010 Crop	168.96	NA	NA	NA	-
(% change)	+1.4%	-	-	-	-
GB Weekly Free-buy Price, 2010 Crop	165.04	NA	NA	NA	-
(% change)	-0.6%	-	-	-	-
Futures Market Comparisons - (£/t)					
Eurex Futures European Proc (For Apr '12)	130.62	117.65	119.69	100.04	▼
Eurex Futures European Proc in 2010 (For Apr '11)	132.60	148.81	162.11	160.44	▼
NEPG European Price Comparison - (£/t)					
The Netherlands (Proc 40mm+ Maincrop Source VTA)	99-151	91-145	NA	NA	-
Germany (New Crop Proc 35mm+ Source REKA)	124-142	100-118	98-103	85-92	▼
France (New Crop Proc 35mm+ Source SNM/UNPT)	NA	NA	NA	NA	-
Belgium (New Crop Proc 35mm+ Bintje Source Fiwap/PCA)	NA	113-122	112-121	83-88	▼
Belgium (New Crop 35mm+ Belgapom Bintje Average)	114	106	89	79	▼

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 mostly on contract, with free-buy 42mm down M Peer at £200/t and Carlingford up to £270/t, with 42/45mm up samples £100/t. Ample supply of free-buy Marfona mostly semi set-skin at £160/t, up to £175 for some high baker grade samples. **In Suffolk and Essex** wholecrop packing Marfona is from £130/t for loose skin, up to £160/t for best set-skin samples. Loose skin M Piper is £160/t and £180/t for best semi set-skin samples. The trade of ware fractions of salad varieties are from £60/t, up to £100/t for better samples. Smaller fractions of M Peer and Charlotte are mainly £200/t, up to £240/t depending on size, with up to £300/t for exceptional 35mm down. **In Lincolnshire** loose skin wholecrop Marfona, Carlita and Sapphire are from £125/t, up to £150/t for semi set-skin samples. **In Yorkshire** light bulk sales of loose skin Marfona are £140-£150/t, and Winston is £100/t. **In Lancashire** smaller salads fractions are £180/t in bags. **In Shropshire and Herefordshire** demand is improving although contracted stocks accounted for most sales. Supplies of free-buy set-skin wholecrop Marfona have increased, with high bakers content at £175-£180/t, and semi set-skin samples are £150-£160/t. Wholecrop M Peer for split grading eased to £180/t. A few semi set-skin wholecrop M Pipers are £185/t. **In Pembrokeshire** prices eased, although there is good movement of M Peer, L Christl and Gemson at £235/t for split grading locally and £180/t for packing outside of the county. Samples of 35mm down Gemson are unchanged at £280/t. **In Scotland** salad supplies of M Peer and Carlingford and Casablanca for general packing have been moved, mainly on contract.

**BAGS**

Trade has been generally slow and mainly relying on local demand. Demand from the processors for poor quality material has taken some of the pressure off the market, especially in the Eastern counties.

**In the South** supply is more than adequate for demand. The ware price in Cornwall is from £60/t, mainly £80/t, up to £100/t and **in the South East** are mainly £100/t. Demand for frying samples of Premiere and Accord is also slow with prices from £110-£120/t, up to £150/t for local sales. **In Shropshire** lifting was restricted by wet conditions over the weekend but supplies are adequate for a slow demand which is putting downward pressure on prices. Chipping samples of Accord, Premiere, Arcade, Fambo and Amora have eased by £20/t on last week and are now in a range of £100-£105/t, with odd £110-£120/t for high quality samples on repeat order. **In Cheshire** adverse weekend weather conditions have severely restricted liftings but prices have eased to compete with neighbouring counties. Accord, Premiere, Fambo and Amora are on offer from £100-£110/t, with up to £120/t for the best samples on repeat order. **In Suffolk and Essex** M Bard, Accord and Premiere are £100-£120/t, Dundrod at £120/t, and M Piper and Cabaret are £140-£150/t. **In Lincolnshire** M Bard, Premiere and Accord are mainly £100-£120/t, up to £130/t for best Accord on repeated order. Ware samples of Marfona are £120/t, limited supplies of Cabaret are £150/t, limestone M Piper are £180/t and limestone Ambo are £200/t. **In Yorkshire** frying samples of M Bard, Premiere and Accord are £110-£120/t, up to £130/t for small volume to local outlets. **In Lancashire** M Bard and Accord are £110-£120/t for local sales in bags. **In Pembrokeshire** movement is mainly within Wales, with demand slow and prices eased in line with other areas. Chipping Accord, Premiere and Amora are £100-£120/t dependant on haulage cost. **On Anglesey** chipping supplies are in balance with demand, with prices eased to compete with lower values in Cheshire. Premiere and Casablanca are £110/t, up to £150/t to local outlets. **In Scotland** the trade is slow, with some Rocket, Casablanca and Epicure £160-£200/t and occasionally up to £300/t for local sales.

## PROCESSING

**In Cornwall and the Isle of Wight** loading of L Rosetta for crisping is expected to finish by next week. Shepody is being moving on contract off the Isle of Wight for the French fry market. **In the East** Premiere and Accord have eased to £80-£100/t and a few M Bard for peeling are £80-£90/t. Movement of L Rosetta, Daisy and some Premiere out of **Shropshire, Herefordshire and Cheshire** have increased mainly on contract. Free-buy supplies of Accord, Premiere and Amora from Shropshire are £80/t, up to £90/t for some M Piper and the very best Premiere. **On Anglesey** there is good movement of L Rosetta and Premiere both on contract.

## 2011/12 CROP PROGRESS

**Total early crop harvested to 15th July was estimated at 4,848 ha, and movement of 147,774t (30.5t/ha), which compares with 4,727 ha and movement of 115,446 t (24.4t/ha) in the same week last year, and 4,507 ha and movement of 130,531 t (29.0t/ha) in 2009.**

**In the South** crops are progressing well and benefiting from rain, although more sunshine is needed. Some non irrigated crops in lower rainfall area are showing signs of early senescence. Crops have been defoliated to restrict size and promote set-skin and yields are generally better than expected. There has been some limited storage of packing M Peer due to slow movement. **In Suffolk and Essex** rain over the weekend restricted liftings but supply is ample and more lifting is expected as conditions improve. Crops continue to make good progress with more set-skin Marfona and M Piper being burnt off. Yields are 42t/ha, which is higher than last year, primarily because crops are two weeks ahead of last year. **In Lincolnshire** rainfall was localised with some restrictions on lifting but supplies were adequate. More loose skin and semi set-skin Marfona, Carlita and Sapphire for packing are now being lifted. Many of the salad crops are being burnt off and first M Piper and Ambo are available. Ware yields are ahead of this time last year, although some crops have low tuber numbers giving lower yield despite the boldness of the sample. **In Yorkshire** the wet conditions over the weekend restricted lifting in some areas but supplies on offer are ample for the demand. Marfona and Winston have become available. Yields are higher and samples are reported to be bolder than average, but clearance is slow and generally behind last year. **In Lancashire** heavy rain restricted lifting over the weekend, especially on heavy soils. **In Shropshire, Cheshire and West Midlands** a combination of rain and favourable temperatures has enhanced growing conditions and crops continue to make good progress. Growth is up to three weeks ahead of last year and yields are also ahead, particularly in the bag sector at 34-60t/ha. Most crops of Marfona have now been burnt off and lifting commenced in the most forward fields, which have up to 70% at baker size. Many crops destined for salads have also been defoliated to minimise oversize tubers. Dry matters have improved and are in excess of 18%.

## 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 by 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](mailto:bpindustryaward@potato.org.uk) Tel: 0131 472 4064 Fax: 0131 472 4065

Growing conditions are similar in **Pembrokeshire** Marfona and Winston bakers have been burnt off with lifting expected to commence. Yields are generally 40t/ha. In **Scotland** crops are responding well to the warm sunshine. Low tuber numbers have been reported and some salads are expected to burnt off by next week. Lifting continued to be light, with Epicure, Casablanca and Javelin with Rocket coming to an end.

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

In **England** old crop is still moving mainly on contract but volumes easing as more new crop takes up shelf space. There is slow movement of old crop on free-buy with wholecrop Whites mainly **Estima** at £160/t for grade 1, £150/t for general pack, £120/t for Mediums graded 43x65mm and £100/t for value packs. **Reds** supply is limited to some Desiree at £220/t for grade 1 and Romano at £180/t for general pack.

#### **Bakers**

In the West there is still reasonably good movement of free-buy Herefordshire Estima at £210-£240/t depending on skin finish.

In **Wales** supplies continue to Welsh supermarkets, although volumes are reducing. Prices are unchanged with Estima £215-£225/t and M Piper £240/t. Limited K Edward and Desiree remain at £210-£230/t depending on quality.

GB ex farm prices (£/t) - 2010 crop							
Packing	w/e 15/07			w/e 08/07			Main Trend
	Low	Main	High	Low	Main	High	
<b>Grade 1</b>							
K Edward	£210	£220	£230	£210	£230	£235	▼
Reds	£210	£220	£230	£210	£220	£230	▶
M Piper	£240	£240	£240	£180	£210	£240	▲
Estima	£160	£190	£225	£180	£205	£225	▼
Bakers Graded	£210	£220	£240	£210	£235	£260	▼
<b>Secondary Pack</b>							
Reds	£180	£180	£180	NA	NA	NA	-
Estima	£100	£125	£150	£90	£130	£170	▼
Wholecrop Bakers	£160	£160	£160	NA	NA	NA	-

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

The demand for 2010 maincrop supplies in bags are very limited, most consumers have now changed over to new crop. However, washed old crop are still selling steadily with prices unchanged at £260/t for Harmony and £220/t for Desiree.

### **WHOLESALE MARKETS**

**Old and New Bakers** – More new crop bakers are available as old crop are diminishing, with both selling at same prices. Jumbo bakers for both old and new Whites are £7.50 and old crop Reds are £13.50-£14.00, all per 25kg.

**New Crop Ware** – Supplies mainly from Kent and Essex are in balance with requirements even though demand is hesitant, but prices are steady and unchanged from last week. Whites are £5.50 odd £6.60 for 25kg, the first Ambo

samples are £7.50 for 25kg and M Piper are £6.50-£7.00, with odd £7.20 in 25kg. Washed M Bard and Nadine are £7.00 and select washed Marfona are £9.00 for 25kg. Good and bright samples of smalls are available with Cornish Charlotte £5.00 for 10kg and M Peer from Eastern Counties £5.00-5.50 for 10kg.

#### **IMPORTS**

**French** Light stocks for bold Spunta are down to £10.00 in 25kg. **Cyprus** Adequate supplies of Spunta to meet the demand with price eased to £8.00 for 20kg. **Jersey Royal** Lighter stocks are available but adequate for the slow demand, prices are unchanged from last week with ware still £4.95 for 15kg (£0.15/lb) and Mids are £3.30-£4.40 for 10kg (£0.15-£0.20/lb). **Israel** light arrivals of fresh Sante (30x42mm), selling at £5.00-£5.50 for 10kg.

Wholesale Markets-2010 Crop Prices out of market w/e 15th July 2011				
Variety	Weight	Select	Washed	Trend
King Edward	25 kg	£6.50-£7.50	-	▼
Reds	25 kg	-	£7.50-£8.50	▼
Maris Piper	25 kg	-	£7.50	▼
Whites	25 kg	-	£6.50-£7.00	▼
Boxed Bakers 40's	15 kg	-	£7.50-£8.00, odd £9.00	▼
Boxed Bakers 50's	15 kg	-	£7.00-£7.50, odd £8.00	▼
Boxed Bakers 60's	15 kg	-	£6.80-£7.00	▼