



## ACTIVITY REPORT

2018-2019



This Activity Report provides an overview of Europatat's work since the previous Europatat AGM in 2018, which took place on 3 May 2018 in Brussels, Belgium.

This work will not have been possible without the leadership of the Europatat Board and the active support of all associations and company members throughout the year.



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# PRESIDENT'S FOREWORD



Dear Members,

This Activity Report is released on the occasion of the 2019 Annual General Assembly of Europatat (13 June 2019, Oslo). It provides a snapshot of the “state of play” of the potato sector today and covers the key policy areas where Europatat has been involved in the last twelve months.

I took over the presidency of Europatat in 2018, a year of exciting developments for the association. A renewed and inspired vision, mission and strategy for the association were approved by the full membership. The secretariat office in Brussels has also welcomed a new team member, to reinforce the work done to achieve our members ambitions for the future. Furthermore, a great number of companies have joined the association during this period, which contributes to the consolidation of the potato family under the umbrella of Europatat.

As you can read in the pages that follow, there are many topics which have gotten the full attention of our Secretariat in the last year. Among them, I would like to highlight two key dossiers. The first relates to promotion, as in order to stimulate the consumption of fresh potatoes in the EU, Europatat has applied together with a number of members for a EU co-financed communication programme to target young consumers (the so called millennials) through social media. The message will be clear: potatoes fit in a modern, healthy and sustainable lifestyle thanks to their versatility, high quality and good nutritional and health aspects. With this joint action, Europatat takes a step towards its vision: to bring potatoes to the table!

The second dossier regards the non-renewal of Chlorpropham (CIPC) and the involvement of Europatat in a coalition with other partners of the potato supply chain (EUPPA, Snacks Association, Startch Europe, CopaCogeca). The coalition is engaged in discussions with the European Commission and the objective is to develop an action plan and a roadmap for the sector to phase out CIPC in a manner that is viable.

Indeed, besides having close cooperation and good contacts with the European Commission and directorates-general such as DG Trade, DG Agri and DG Sante, Europatat counts with an important network of stakeholders which is becoming more solid and active, given the general benefits of finding synergies with like-minded partners. We can indeed be proud of this year's accomplishments of Europatat, making sure that the concerns and challenges of the potato sector are heard and understood by such a large number of stakeholders.

Finally, I would like to sincerely thank my colleagues in the Board, and the Advisory Group (Commission chairmen), for their generosity, time and dedication; and by extension to all members, both national federations and private companies, for supporting the efforts of the association to implement successfully all the activities for the benefit of the sector.

Gilles Fontaine  
President of Europatat





# THE ASSOCIATION

## ABOUT



Europatat, the European Potato Trade Association, is an international non-profit association according to Belgian law that gathers national associations and companies involved in the trade of seed potatoes and ware potatoes from all over Europe.

Initially set up in 1952 by national associations to protect the interests of the wholesale potato merchants, since 2010 its membership is also open to individual companies active in the trade of seed, ware and early potatoes within Europe and beyond.

During the General Assembly of 3 May 2018 held in Brussels, Belgium, an ambitious Europatat Strategy was approved by the members of the Association. This Strategic Plan describes the vision and mission of Europatat, as well as the key fields of action and priorities for the next three-year period (2018-2020). The Europatat Strategy will serve as the guideline for the Association to promote its mission and to achieve progress in all of its major objectives.

## OUR VISION

*Bring potatoes to the table!*

## OUR MISSION

- **Represent** and **promote** the interest of the potato trade sector on a European and International level;
- **Protect** and **improve** the professional interests and the commercial function of the sector in Europe and beyond;
- Facilitate the **collection of data** and information;
- **Educate** consumers and decision-makers alike about the benefits of potatoes;
- **Connect** sector representatives and stakeholders through networking opportunities.



## STRUCTURE

Europatat is structured around a General Assembly, a Board and six commissions. This organisation enables, in spite of occasional conflicting opinions and interests, to define with an open mind a common policy defending the profession.



**Gilles Fontaine**

*President*



**Domenico Citterio**

*Vice-President*



**Heero Gramsma**

*Treasurer*



**Tigran Richter**

*Chairman Seed Potato  
Commission*



**José Pelaez**

*Chairman Early Potato  
Commission*



**Francisco Moya**

*Chairman Ware Potato  
Commission*



**Ben Muyshondt**

*Chairman Packers Commission*



**Thomas Herkenrath**

*Chairman RUCIP Commission*



**Jan van Hoogen**

*Chairman Technical and Regulatory  
Issues Commission*



**The Secretariat:** the daily work of Europatat is conducted by Raquel Izquierdo de Santiago, *Managing Director*, and Berta Redondo, *Communication and Policy Advisor*.

The secretariat is based in Brussels.

## MEMBERSHIP & BENEFITS

Europatat presently incorporates the national associations of the biggest potato trade partners in the EU as well as individual companies active in the potato trade.

**Over the past year, 8 private companies have become a direct member of Europatat, and 4 other companies and institutions have also joined the Association as associated members.** In total, Europatat has currently 59 members that represent 20 countries in the EU and beyond. The complete list of members is to be found at the end of this report.

The membership of Europatat is balanced between its various membership categories and members' focus. This guarantees a good balance of interest and a wide diversity of expertise available to the association. In the upcoming years, Europatat seeks to reinforce even further its cooperation with companies and associations based in Southern and Eastern Europe in order to better reflect the reality of the potato trade in Europe.

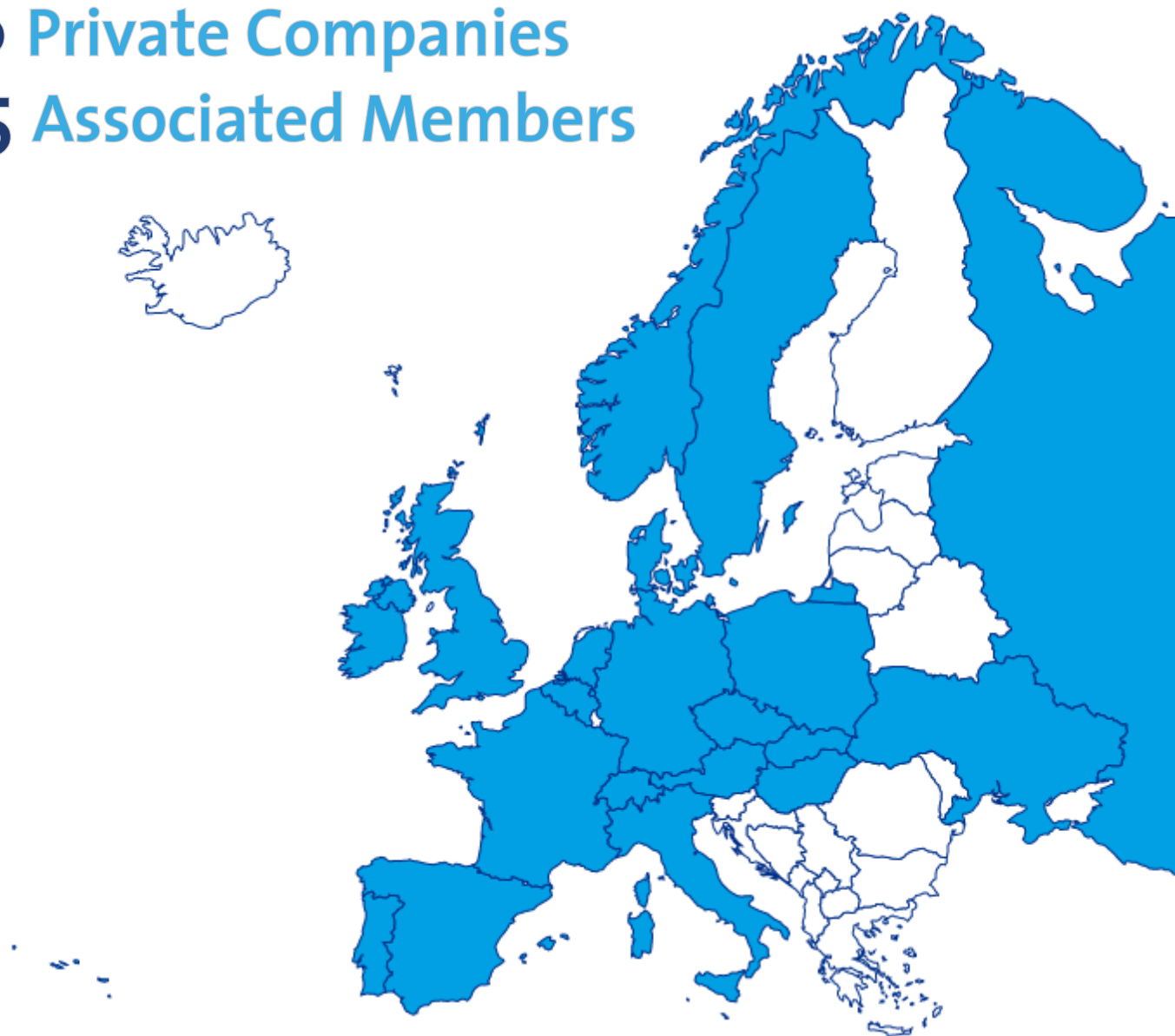
Besides granting to the association the strengths of their support and their professional input, members of Europatat benefit from a wide range of services and advantages enabling them to get a grip on the many challenges the potato sector faces today: trade barriers, increasing concerns over food safety and environment, quality, etc.

Among these services or advantages are:

- Having the ability to influence the European decision-making process and strengthen the position of the potato trade sector on the international trade scene;
- Having the ability to exchange views and develop common positions with colleagues engaged in similar activities;
- Enjoying the networking opportunities offered by an association with an international dimension;
- A regular Newsletter including the latest information on crucial developments in the potato trade and on European legislation affecting the potato supply chain;
- Services of a multilingual Brussels-based Secretariat for fast answers to key questions relating to the potato sector.



**18 National Associations**  
**36 Private Companies**  
**5 Associated Members**



Not yet a member of Europatat? Please contact us at [secretariat@europatat.eu](mailto:secretariat@europatat.eu)

Europatat's resources are exclusively resulting from membership fees. A strong organisation can only be built by gaining the support of all the stakeholders in the potato trade. Europatat thanks its members for their support!



# Grow with our Next Generation potatoes!



**Carolus, Twinner, Twister** and **Alouette** have recently become available from various points of sale. These varieties offer a naturally high resistance to the main threat (i.e. *Phytophthora infestans*) to potato crops. This gives farmers greater harvest security and consumers a natural, fresh and versatile product in the kitchen.

Each variety in this range offers slightly different traits. Choose Carolus for a mild flavour and a floury quality. Delicious fried or baked in the oven. Alouette makes a supremely tasty mash. And bright yellow skinned Twinner brings a lovely firm bite to your salads. Twister tastes simply fabulous served with fresh vegetables.

The **Next Generation** varieties from Agrico. Strong and sustainable. Providing good yield, with little to no input. Suitable for many new generations worldwide. Our farmers like to put innovative potato varieties on the consumer's plate. **How about you?**

# KEY FIELDS OF ACTION:

## Interest representation



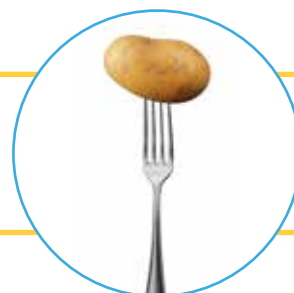
Agricultural Policy

Promotion, consumption and marketing



Plant Safety

Food Safety



Trade

Sustainability, Research & Innovation







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Always read the label and product information before use.*

# Agricultural policy

Potatoes are an important component of the agriculture sector for the different goals of the European Commission in regard to jobs and growth, sustainability and health. Europatat is playing an active role at the EU agricultural discussions in order to assure the best position of the potato traders regarding dossiers as the reform of the Common Agricultural Policy (CAP), the Organic regulation or the Unfair Trading Practices new legislation.

## The future of the CAP

On 1 June 2018, the European Commission published the three legislative proposals for the next CAP 2021-2027. Based on nine broad objectives, these proposals include a shift from compliance and rules towards results and performance. The Commission's proposals also include clear and higher ambitions on environmental and climate action.

Following the legislative procedure of the EU, the European Council and the European Parliament are also currently discussing their positions in relation to the Commission's proposal.



- At the Parliament level, there is a call on the Commission to delay the introduction of the new delivery model until 2022 to consider the discussions on the long-term budget and the adoption of programmes at Member State level. All three reports will go before Plenary under the next parliamentary term, who may decide to put them to a plenary vote. Otherwise, the newly-established Agricultural Committee will (re)-consider the three CAP files again.



- On the Council side, the Romanian Presidency is still keen to secure a partial general approach by the end of June. During the discussions over the last months, Agriculture Ministers of the EU 28 have welcomed in principle the shift to a performance-based CAP but have stressed the need to maintain the common nature of European agricultural policy.

In the last 12 months, Europatat has monitored the development of the discussions and has participated in the various meetings of the Civil Dialogue Group CAP organised by the European Commission.

At this stage of the negotiations, Europatat will keep following the evolution of the discussions and inform its members of any relevant developments.







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# Organic farming: new EU rules adopted



On 22 May 2018, the Council adopted new EU rules on organic production and the labelling of organic products. Since then and before the entry into force of this new legislation in January 2021, the process of adoption of the implementing and delegated acts requires a serious amount of work with a strict calendar. All acts will have to be adopted at the latest 6 months before 2021 in order to allow operators to adopt to the new rules.

As from 1 January 2021 it is worth mentioning that:

- production rules will be simplified and further harmonised through the phasing out of a number of exceptions and derogations;
- the control system will be strengthened thanks to tighter precautionary measures and robust risk-based checks along the entire supply chain;
- producers in third countries will have to comply with the same set of rules of those producing in the EU;
- certification will be easier for small farmers thanks to a new system of group certification;
- there will be a more uniform approach to reduce the risk of accidental contamination from pesticides.

As regards the process, the first step was for the European Commission to group different issues by topic, followed by the planning on the timing. The grouping into topics includes production rules, labelling and controls and trade rules. Given that production rules can have an impact on investments for operators, the European Commission has decided to start working on this topic.



Europatat is actively monitoring the development regarding implementing and delegated acts and is active in a number of specific topics, as it is the case for certain derogations, that are of particular interest to the potato sector.

# Fighting UTPs in the food supply chain

In April 2018, the European Commission published a proposal for a Directive on Unfair Trading Practices (UTPs) in business-to-business relationships in the food supply chain with the objective to improve the position of farmers in the food supply chain.

After a detailed analysis of the text and with the support of its members, Europatat contributed to the political debate through the following actions:

- Europatat sent to the European Commission a response on its proposal requesting mainly an extension of the scope of the Directive, and the guarantee that the well tested system of RUCIP could coexist with the proposed regulatory initiative.
- Europatat also sent its response to the seven main rapporteurs for this dossier in the European Parliament in order to explain the attributes of the potato supply chain and the pivotal position that potato traders have in the sector's value chain, and to defend the position of the sector in the negotiations at the EU level.
- With the umbrella association CELCAA, Europatat met different representatives from the European Institutions to highlight the role of traders in the supply chain, given that the debate often focussed solely on farmer-retailer relationships.
- During the tripartite meetings between the European Commission, the Parliament and the Council (the "trilogues"), Europatat followed very closely the discussions and kept informed its members via the internal communication's tools of the Association.



The Directive on unfair trading practices (UTPs) in business-to-business relationships in the agricultural and food supply chain entered into force on 30 April 2019.



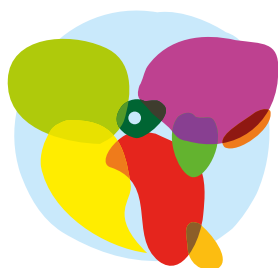
# Market transparency and price reporting

Following the recommendations of the Agricultural Markets Task Force report to better distribute the added value across all levels of the food supply chain, the European Commission is preparing an amendment to the Implementing regulation (EU) 2017/1185 on market transparency, which can lead to new price reporting obligations to agri-operators.

In the last 12 months, Europatat has participated in various meetings and seminars organised by the European Commission to gather feedback from EU organisations on the benefits and constraints of collecting and disseminating price-related information. More concretely, Europatat contributed to the European Commission's public consultation on "Market transparency in the agri-food supply chain". In February 2019 Europatat also participated in a high-level stakeholder conference where the Commission presented different options for establishing new price reporting obligations in the food supply chain.



At the time of writing this Activity Report, the legislative proposal from the European Commission has not yet been published. Europatat will follow closely the work of the Commission to ensure the most positive outcome for the potato trade.



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# Promotion, consumption and marketing

Potatoes are a popular product in the EU, popular with European consumers and deeply anchored in the food habits of the Union. However, fresh potatoes face nowadays two main obstacles: a long-term decrease in their consumption; and a deterioration of their image. In their search for new global experiences and culinary discoveries, consumers often look beyond the richness of the locally produced potato. This trend has led to a decrease of potato per-capita consumption among the different age groups, especially in younger households.



To reverse this situation and to stimulate the consumption of fresh potatoes in the EU, Europatat has prepared together with Belgium, France and Ireland a communication programme under the EU promotion policy for agricultural products.

The campaign will target consumers between 18 and 34 year-old (the so called millennials) living on their own, co-habiting or with young families. The message will be clear: potatoes fit in the modern, healthy and sustainable lifestyle of millennials thanks to their versatility, high quality and good nutritional and health aspects.

With this joint action, which needs to be approved by the European Commission by the end of 2019, Europatat will accomplish its vision: **to bring potatoes to the table!**

For the year 2020, the budget provided by the EU promotion policy of agricultural products will be €200 million.

In order to ensure that the priorities for each year call for proposals reflect the particularities of the potato sector, Europatat contributes regularly to the drafting of the Commission's annual work programmes. During the period covered by this Activity Report, Europatat has sent comments to the Commission ahead to the adoption of both 2019 and 2020 annual work Programmes.

Europatat also sent feedback to the Commission on its Roadmap of the Evaluation of the EU agricultural promotion policy.



# Plant Safety

European plant health policy is one of the major policy dossiers for Europatat. The association is supporting the free trade of seed and ware potatoes with respect of the plant health legislation, which intends to prevent or eradicate the presence of a number of harmful organisms such as *Ralstonia*, *Clavibacter*, *Synchytrium*, *Globodera*, Colorado beetle and others.

## Plant Health: final straight

Regulation 2016/2031/EU on protective measures against pests of plants will come into force on 14 December 2019. In the meantime, many Implementing and Delegated acts of high relevance for the potato sector have been and will be adopted to provide the practical details of the new rules. A number of implementing and delegated have been already published in the past 12 months, notably:

- High risk plants, plant products and other objects. Two relevant implementing regulations: Specific rules concerning the procedure to be followed in order to carry out the risk assessment of high risk plants, plant products and other objects; and the provisional list of high risk plants, plant products or other objects, including *Ullucus tuberosus*, and a list of plants for which phytosanitary certificates are not required for introduction into the Union.
- Update of Annexes I to V of Directive 2000/29: Protective measures against the introduction into the Community of organisms harmful to plants or plant products and against their spread within the Community. The list of priority pests the stakeholder consultation is expected in June 2019. The update of pests and measures is expected for stakeholder consultation in the second half of 2019.
- Criteria to be fulfilled by authorised operators to issue plant passports – which exceptionally will only enter into application in December 2020 instead of 2019.



# Official Controls: priority to import controls

Regulation 2017/625/EU on official controls and other official activities performed to ensure the application of food and feed law, rules on animal health and welfare, plant health and plant protection products, entered into force on 27 April 2017. The rules will be gradually phased in, to give EU countries and industry the time to adapt. For the majority of the rules the application date is 14 December 2019.

Key aspects of change for food control operations, which need to be taken into account by third country importers such as:

- Establishment of a common harmonised approach to import controls for all Member States.
- Border Control posts will replace the existing Border Inspections Posts (BIP's) and Designated Points of Entry (DPE's).
- A single standard document, the Common Health Entry Document will be used by operators for the prior notification of consignments transmitted via IMSOC.
- Establishment of a uniform and harmonised approach to certification requirements.



A number of implementing and delegated have been already adopted in the past 12 months:

- Uniform practical arrangements for the performance of official controls on plants, plant products and other objects in order to verify compliance with Union rules on protective measures against pests of plants applicable to those goods.
- Rules on official controls and measures in cases of non-compliance of certain categories of animals and goods from third countries.
- Common Health Entry Document (CHED).
- Rules on border control posts and measures to be taken in cases of non-compliant consignments of animals and goods.
- Exceptions for plant passports, including details for the expectation to use a plant passport. Indeed, these passports are not required for selling plants and plant products to end users (in small quantities).

In the coming months Europatat, in coordination with its members, will accentuate its actions on these dossiers to defend the interest of the sector, through the monitoring of all new developments, as well as by providing direct input to the European Commission in bilateral as well as public meetings (particularly DG SANTE's Advisory Group on the Food Chain on Plant Health), or in written via official consultations.



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# Food Safety

Food safety remains highly on the agenda of Europatat. The policy of the European Commission (and Member States) to reduce the use of plant protection products where possible is taken seriously by the potato sector. Ensuring a high level of protection of human health regarding the food industry, is a guiding principle fully endorsed by the sector. Europatat also advocates for the cohesion of other relevant policies as regards the EU Food System (i.e. the sustainable development goals on food security or climate change), so that the sustainable role of potatoes is also acknowledged.



## Transparency at the centre

The General Food Law legislation has recently been under revision to provide increased transparency to the EU risk assessment. The new rules, for instance, introduce the obligation on EFSA to make the studies submitted as part of the application process for the approval of pesticides publicly available; and that EU citizens will have greater access to information submitted to the European Food Safety Authority (EFSA) and boost transparency.

At the beginning of this year, Europatat (who is a member of EFSA's Stakeholder Forum) contributed to an EFSA consultation regarding the risks for animal and human health related to the presence of glycoalkaloids in feed and food, in particular in potatoes and potato-derived products.

Europatat is also actively involved in the activities of the "Agri-Food Chain Round Table for Plant Protection", a roundtable of more than twenty agri-food chain industry associations with an interest in the European legislative framework related to plant protection products.

## Plant Protection Products

The availability of pesticides to grow and store potatoes is of the highest importance to present a quality product to the consumer and to assure the trade position of the European potato sector.

To this end Europatat continuously monitors and inform members of any developments regarding legislative requirements, the withdrawal and authorisation of plant protection products and corresponding Maximum Residue Levels (MRL). Europatat aims at facilitating the move towards better agricultural practices for its members. The high level rate of MRL compliance confirms the commitment undertaken by the sector towards the common goal.

In recent months the potential ban on use of certain pesticides (notably chlorpropham) is being closely followed to assess the impact for the potato supply chain. To this end a "potato coalition" has been created by the potato supply chain to synergise efforts and make sure that the sector is heard on its efforts to anticipate future legislation and limitations regarding this substance.



# Trade

Globalisation is having every year a more important impact on trade. In the modern global economy trade is essential for growth, jobs and competitiveness. The European potato sector should position itself to keep pace of worldwide evolving consumer demands and to open up new markets.

Potatoes are traded mainly on the EU internal market, however the sector shows also a competitive edge in international markets, especially in the sub-sectors of seed potatoes and processed products. The European Union is one of the world's most open markets, with low external tariffs and a borderless single market. But for open trade to deliver its full range of benefits, it must be a two-way street. Europatat advocates that favourable trade environment should be built on the basis of fair and reciprocal trade opportunities both for import and export.

## Free Trade Agreements

The international Free Trade Agreements that the European Union has entered with 3rd countries are an opportunity to open new markets for exporters, providing them access to foreign markets on the same terms as the EU offers.

During the last 12 months, trade negotiation processes between EU and third countries have included: US, Japan, Singapore, Vietnam, Mexico, MERCOSUR (Argentina, Brazil, Paraguay and Uruguay), Chile, Australia and New Zealand.

Europatat welcomes the European Commission's initiatives to promote free trade through the establishment of a network of bilateral and regional free trade agreements. Yet liberalisation must come by the hand with real market access. Non-tariff measures (NTMs)– those related to laws, regulations and requirements such as sanitary and phyto-sanitary measures (SPS), technical barriers to trade (TBT) and customs procedures – can reduce or at the least increase trade costs.



## Sanitary and Phytosanitary Agreements

The EU has also concluded a series of trade agreements regarding sanitary and phytosanitary measures with single countries or groups of countries from outside the EU. International SPS measures are based on the World Trade Organisation (WTO) SPS Agreement, international standards and recommendations or guidelines.

Europatat plays an important role in defending the potato sector interest when confronted to SPS issues and to promote an open market access. Notwithstanding the political nature of certain dossiers, Europatat supports members in defending the market at the European level.

A number of markets have been in the agenda of Europatat in the last 12-month period, as for example Russia, Belarus, Egypt or Algeria.

Regular participation in DG TRADE's Civil Society Dialogue meetings and DG Trade's Sanitary and Phytosanitary working groups allows Europatat to put forward the views of potato trade in ongoing trade negotiations and market access opportunities.

## The EU and Free Trade Agreements: ongoing



## Digitalisation of procedures and certifications

Besides collaboration with the European Commission on the development of phytosanitary certificates and the Integrated Management System for Official Controls (IMSOC), Europatat is a member of the ePhyto Industry Advisory Group (IAG) directly involved in the development of the International Plant Protection Convention (IPPC) ePhyto (electronic phytosanitary certification) Solution.

The IAG has been established to provide practical guidance and advice to the IPPC Secretariat on the design, development and deployment of an ePhyto Solution which consists of a global hub and generic national system to facilitate the international exchange of electronic phytosanitary information by developing countries. The IAG will also advise the IPPC Secretariat on the feasibility of the project and its ability to facilitate efficient and effective trade flows.



The ePhyto case studies are supported by:

Displayed in no particular order



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## Brexit: Extension granted

After the request of UK's Prime Minister Theresa May, the EU 27 Member States decided on 11 April 2019 to extend further the two-year period provided for by Article 50 to exit the Union. According to this extension, the UK is given until 31 October 2019 latest to ratify the Withdrawal Agreement (deal). If so, the UK will exit the EU on 1 November 2019.

Until then a number of scenarios could still happen (including a revocation of Article 50), but since the possibility of a no-deal scenario remains, **Europatat continues to advise its members to keep advancing with preparedness for all eventualities, including a no-deal exit of the UK.**

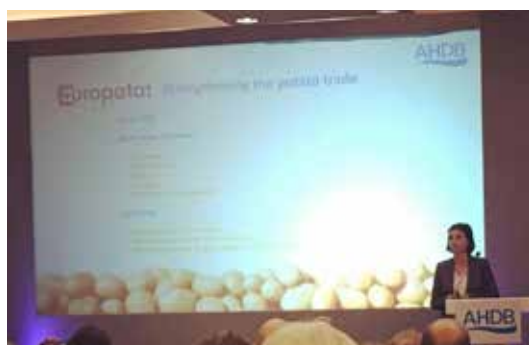


Of the total current UK potato imports, 77% of ware potatoes and 100% of seed potatoes originate from the EU. After Brexit, if no withdrawal agreement (including a transitional period) is reached, potato imports will be subject to conditions imposed by DEFRA.



Of the total current UK potato exports, 99% of ware potatoes are to the EU/EFTA, and 32% of seed potatoes are to the EU. After Brexit, if no withdrawal agreement (including a transitional period) is reached, UK potato exports to the EU become impossible until an appropriate reform of Annex III of the EU Plant Health Directive 2000/29 is implemented.

Europatat has continued with the monitoring and information to members on the preparedness and contingency plans by the EU and Member States. Europatat participated in the Seed Industry Event 2018 organised by AHDB in Scotland.



Europatat has also been directly involved in bilateral meetings with the European Commission Preparedness Group, as well as stakeholder consultations with the different Commission DGs affecting the potato sector.

In particular, a position paper was sent to DG SANTE (Plant Health Unit), to convey the sector's common position and requests to mitigate the damage of a no-deal scenario upon the potato sector. Further monitoring and coordination with members and the institutions will be continued in the upcoming months.



# Sustainability, Research & Innovation

The potato sector is continuously investing in research and innovation along the complete chain. The sector is always exploring ways to produce crops efficiently and economically, driven by customer needs and innovation with the aim of meeting consumer requirements for affordable and convenient potatoes, and exploiting export markets with a range of potato varieties and improvements.

## Tackling Food Waste in the potato sector

The concern regarding high levels of food waste in the European Union has been high in the political agenda in the past years. The EU and Member States have committed to meet the Sustainable Development Goals (SDG), which include a target to halve per capita food waste at the retail and consumer level by 2030 and reduce food losses along the food production and supply chains.

Food waste should be reduced as much as possible, a message that the potato sector also fully endorses. In this sense, Europatat can confirm that the potato sector is taking responsibility for waste reduction, as it is shown by initiatives such as “Every Crumb Counts”, a Joint Declaration signed by Europatat and other co-signatories from the food supply chain already in 2013; or a position paper released in 2016 compiling best practices and recommendations to tackle food waste at various levels of potato supply chain.

In addition, Europatat is an active member of the EU Platform on Food Losses and Food Waste, and more concretely, of its sub-group on food waste measurement. As such, in April 2019 Europatat participated in the public consultation on the Draft Delegated Act on food waste measurement that the European Commission published in March 2019.

The potato sector has a very positive story to tell about the efforts being made to avoid and reduce food waste. In the past year, Europatat has been gathering information from its members about good practices tackling food waste in the sector. An overview of this initiatives will be presented at the Europatat Congress 2019 and will be made public in the following months.





## EU action against single-use plastics

With eight million metric tons of plastic entering the world's oceans every year, there is growing concern about the proliferation of plastics in the environment. In Europe, around 25.8 million tonnes of plastic waste are generated every year, of which almost 60% came from packaging. However, only 40% of the packaging plastic waste is recycled.

To address the problem, the European Commission adopted in January 2018 its first Plastics Strategy with a main objective: By 2030, all plastic packaging placed on the EU market should be reusable or easily recyclable. A few months later, in June 2018, the Commission also published a Proposal for a Directive on the reduction of the impact of single-use plastic products on the environment, which will ban the 10 most found plastic waste items on European beaches.

After the political agreement reached by the European Parliament and the Council in December 2018, Europatat got hold of the final compromise text and made an analysis of the implications of the Directive for its members, which was presented at the last Packers Commission in February 2019. Once officially approved by the Council in May-June 2019, the Directive will enter into force and Member States will have two years to transpose it to their national law.



Given the current high social demand to reduce plastic packaging, Europatat will continue monitoring the political discussions and informing its members to ensure the most positive involvement of the potato trade on this topic.

# POTATO EUROPE

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# Research programmes

Over the last years, the European Commission has spent increasingly more attention to Research and Innovation, via its flagship initiative 'Horizon 2020', running from 2014 to 2020. The programme foresees €80 billion for funding of Research and Innovation projects, with some projects focussing on research excellence, and others on innovation with special emphasis on the involvement of small and medium-sized enterprises (SMEs).

In January 2019, Europatat participated for the first time ever in the submission of three research projects under Horizon 2020. In April 2019, the Commission informed the participants about the status of their submission, which was rather positive for Europatat: two out of the three projects submitted passed to the second stage of the call for proposals.

At this stage, Europatat is currently participating in the preparations for the final submission of the two programmes selected, which are directly related to problems affecting the sector: the tolerance to water stress in potato and the pursuit of sustainable alternatives to pesticides. In both cases, Europatat will act as disseminator of the scientific outcome of the projects and will monitor the topic of the project closely from a policy perspective.

With the participation in these projects, Europatat will, in the long-term, increase its network of contacts on relevant topics (such as plant protection products and plant health) and its influence in setting of priorities for research projects relevant for potato traders in Europe.



In July 2018, the European Commission published its proposal for Horizon Europe, an ambitious €100 billion research and innovation programme that will succeed Horizon 2020 from 2021 to 2027.

At this stage of the legislative process, Europatat will keep following the evolution of the discussions to inform its members properly and to give feedback to the Commission when necessary.





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# New plant breeding techniques (NPBTs): uncertain future

The future of the agricultural sector faces a number of serious challenges now and in the coming decades. Climate change, increasing yields for a growing global population, increasing resistance against new and existing threats, and creating sustainable land use. While these challenges and their solutions are manifold, innovations in the seed breeding sector promise to assist in answering these challenges.

The recent judgement of the European Court of Justice (ECJ) on NBTs, that put organisms produced using mutagenesis under the same EU rules as those genetically modified with transgenesis (and consequently under the same risk assessment, traceability and labelling requirements), has created much debate at EU level. Public opinion is rather split, between those insisting on strong controls, and others who suggest that limiting the European plant breeding industry's freedom to use the latest technology will make EU agriculture less competitive.

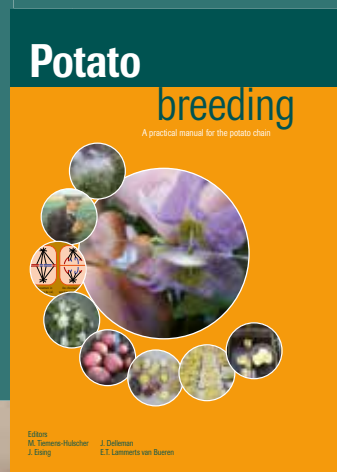
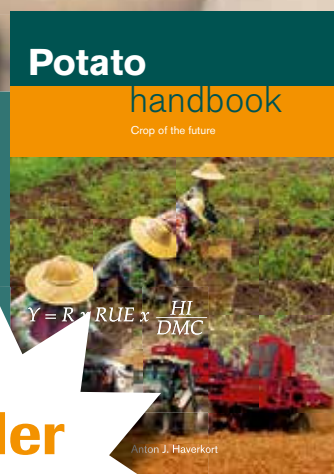
Europatat has been actively monitoring recent developments and joining forces with other likeminded associations to defend the sector's view on the topic. Indeed, potatoes are the most important vegetable crop and the fourth most important food crop in the world. Besides, given their importance for both the fresh market and as raw material for many processing industries, Europatat position is for the protection of a high-performing, innovative and diversified European plant breeding industry and supports a reasonable approach towards new breeding techniques in line with the recommendations of Member States' Experts and the vast majority of scientists.





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# KEY FIELDS OF ACTION: Public affairs & Networking

## Connecting the sector

### Europatat Congress 2018

Under the slogan *"Potatoes: a healthy, sustainable and responsible sector"*, the annual event focused on the many assets of the sector in the areas of health, nutrition, sustainability and social corporate responsibility, and how they feed into the Sustainable Development Goals adopted by the United Nations. With more than 90 participants from 21 different countries, the Europatat Congress 2018 and side events received an extremely positive feedback, remarking the high quality of the speakers and their refreshing and inspiring messages.



### Europatat Congress 2019

Under the title *"The timeless potato: A dynamic and innovative food"*, the congress will explore the potential for innovation within the sector now and into the future as well as Norway's special trade relations with the EU. Key speakers from both the business and the Norwegian public authorities will share with the audience their insights on these important topics in a unique event organised for the first time ever in Norway.

### Europatat Commissions

The six Europatat Commissions allow Europatat to be continuously updated on trade issues and to respond to all legal developments on the EU level in a quick and efficient way and thus carry out the main activities of the association. The commissions are composed of representatives of national associations and individual companies and meet at regular intervals.





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# KEY FIELDS OF ACTION:

## Public affairs & Networking

### Representing the sector

In order to voice the professional views of the sector, Europatat regularly cooperates with the EU Institutions and stakeholders as the European representative organisation for the potato trade.

#### EU events and meetings

The Europatat secretariat and members participate on a regular basis in EU Advisory Groups whose work touches upon the potato trade. Committees of DG AGRI include Civil Dialogue Groups on the Common Agricultural Policy, Environment & Climate Change, International Aspects of Agriculture, Organic Farming, Quality and Promotion. In addition, Europatat took during 2017-2018 the responsibility of chairing the CDG on Promotion and Quality.



Europatat is also represented in the work of DG SANTE, particularly in the Advisory Group on the Food Chain and Animal and Plant Health and other specific ad-hoc working groups. In regard to DG TRADE, Europatat regularly attends the Civil Society Dialogue meetings on trade issues and the Market Access Working Group on Sanitary and Phytosanitary Issues.

#### Meetings with industry stakeholders

Where relevant, Europatat seeks to cooperate with other EU trade associations in order to maximise synergies and raise awareness on common concerns. In this light, the association is member of CELCAA (European sectoral trade associations) and regularly engages with the European Seed Association (ESA), the European Potato Processors Association (EUPPA), the European Snacks Association (ESA), the European Starch industry (Starch Europe), the European Fruit and Vegetable Processors Association (PROFEL) as well as the major roof organisations in the food supply chain (COPA-COGECA, FoodDrinkEurope, EUROCOMMERCE).



Importantly, Europatat enjoys the day-to-day synergies of a shared office with other EU associations involved in the agri-produce trade: FRESHFEL (fresh fruit & vegetables), Growing Media Europe (growing media and soil), FRU-COM (dried fruits and nuts) and UNION FLEURS (flowers).





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# KEY FIELDS OF ACTION: Communication

Information flow is a key for building policy positions, for networking and for accountability. Europatat has therefore developed several tools to communicate on a regular basis with its members and the outside world in the most efficient manner.

## Communicating to the members

Europatat aims at giving its members access to information on European legislative developments as early as possible. The main activities that Europatat undertakes towards accomplishing its mission are:

- **Alerts emails.**
- **Europatat Circulars**, which are sent to members twice per month, include the latest information on crucial legislation, important developments within the potato trade, and actions undertaken by the Secretariat.
- **Europatat press releases and position papers** on a variety of topics to raise awareness for matters of interest to the potato sector.
- **Europatat Extranet**, which is exclusive for members and contains documents such as position papers, presentations and minutes from meetings or newsletters. In 2019, a digital directory of members, a forum and a browser notification system have been also implemented.



## Improving Europatat's visibility

Europatat has a new newsletter called "*Europatat Insights*", which is circulated every two months highlighting the latest activities of the Secretariat. The Secretariat is also regularly updating the official Europatat website and being active on Twitter and LinkedIn.

In addition, Europatat once again had a booth at Fruit Logistica to present the work of the Association and multiply contacts with the sector. With the same objective, Europatat has also participated in other European fairs such as Fruit Attraction, Potato Europe or the Potato Variety Days. In 2019 for the first time ever, Europatat was present at the Potato Expo, which took place in Austin, Texas (US).





# Events on the Spotlight











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# RUCIP

## RULES & PRACTICES OF THE INTER-EUROPEAN TRADE IN POTATOES

Since 1956 RUCIP is the reference for the potato trade at national and international level. RUCIP can be used in all potato contracts between professionals in the potato chain (producers, trade, processor) as it offers a chapter on rules (the contract, the potatoes, cost and risks of transport, delivery and payment, complaints and disputes) and as well the possibility of expertise as arbitration much quicker than court proceedings. Once a clear reference of RUCIP has been mentioned on the contract signed by the concerned parties the RUCIP rules apply.

Since the RUCIP foundation by Europatat in 1956, it has been modified several times, to adapt to the demands of the trade and the technical evolution within the potato sector. The most recent version is effective since 1 January 2017.

### Advantages

- Faster procedures
- Professionals involved
- Confidentiality
- Precise, practical and reliable

National RUCIP secretariats are located in Czech Republic, France, Germany, Ireland, Italy, the Netherlands, Spain, Switzerland and the UK.

Portugal is also currently joining as a National secretariat.



### EUROPEAN RUCIP COMMITTEE

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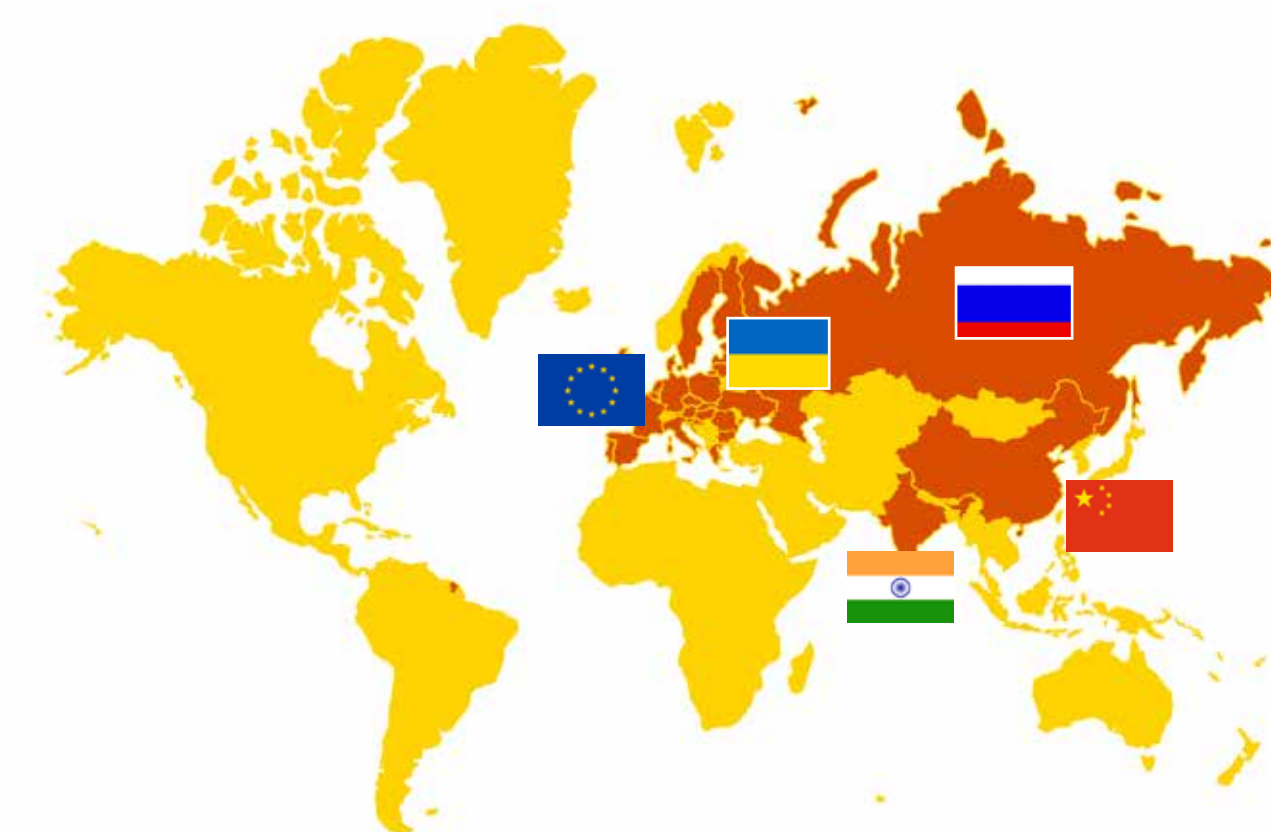
# World production

Potato is the most important tuber crop in the world and is grown in over 100 countries. Potatoes are an important food for the fresh market and as raw material for a globally expanding processing industry. Although many countries across the globe are boosting their potato production, China and India are emerging as the clear world leaders, with Russia following closer.

According to FAOSTAT data, the global potato production has grown steadily from 267 million tonnes in 1990 to 388.191 million tonnes in 2017, which breaks a new world record in potato production.

## Top 5 world producers

	China	99.147.000 T	
	EU 28	61.562.988 T	
	India	48.700.000 T	
	Russia	29.589.976 T	
	Ukraine	22.208.220 T	

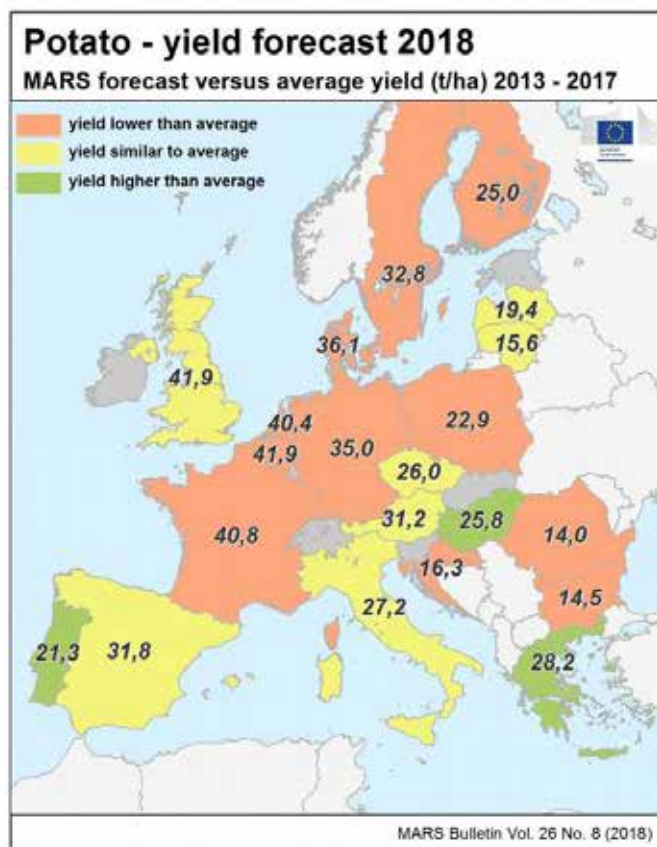


## European Data

Potatoes belong to the most competitive segments of EU agriculture. However, due to the extreme drought that Europe suffered in the summer of 2018, the average potato yield for 2018 was revised downwards to 31.1 tonnes per hectare. In the case of the five major potato producers in Europe (Netherlands, Belgium, France, Germany and the UK), the average yield of 39.4 tonnes per hectare was the lowest this century and 15.0% down on 2017.

**According to Eurostat data, 52.5 million tonnes of potatoes were harvested in the EU-28 in 2018, down by 15.4% compared to 2017.**

Country	POTATO (t/ha)				
	Avg 5yrs	2017	MARS 2018 forecasts	%18/5yrs	%18/17
EU	33.4	35.3	31.1	-6.9	-12
AT	30.9	28.4	31.2	+0.7	+10
BE	46.3	47.6	41.9	-9.6	-12
BG	15.5	17.8	14.5	-6.1	-18
CY	-	-	-	-	-
CZ	26.8	29.4	26.0	-3.0	-12
DE	44.5	46.8	35.0	-21	-25
DK	42.3	43.7	36.1	-15	-18
EE	-	-	-	-	-
ES	31.5	31.9	31.8	+1.1	-0.4
FI	27.1	28.9	25.0	-7.9	-13
FR	43.4	44.4	40.8	-6.0	-8.1
GR	26.8	28.3	28.2	+5.5	-0.1
HR	17.0	NA	16.3	-4.1	NA
HU	24.7	NA	25.8	+4.5	NA
IE	-	-	-	-	-
IT	26.9	NA	27.2	+1.1	NA
LT	15.8	12.3	15.6	-1.3	+27
LU	-	-	-	-	-
LV	18.8	NA	19.4	+3.2	NA
MT	-	-	-	-	-
NL	43.6	46.0	40.4	-7.4	-12
PL	23.9	25.3	22.9	-4.3	-9.4
PT	19.7	21.7	21.3	+7.9	-1.8
RO	15.9	18.2	14.0	-12	-23
SE	34.7	34.7	32.8	-5.3	-5.4
SI	-	-	-	-	-
SK	-	-	-	-	-
UK	42.4	NA	41.9	-1.1	NA

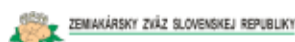


In terms of trade, potatoes are traded mainly on the EU internal market; however, the sector shows also a competitive edge in international markets, especially in the sub-sectors of seed potatoes and processed products.

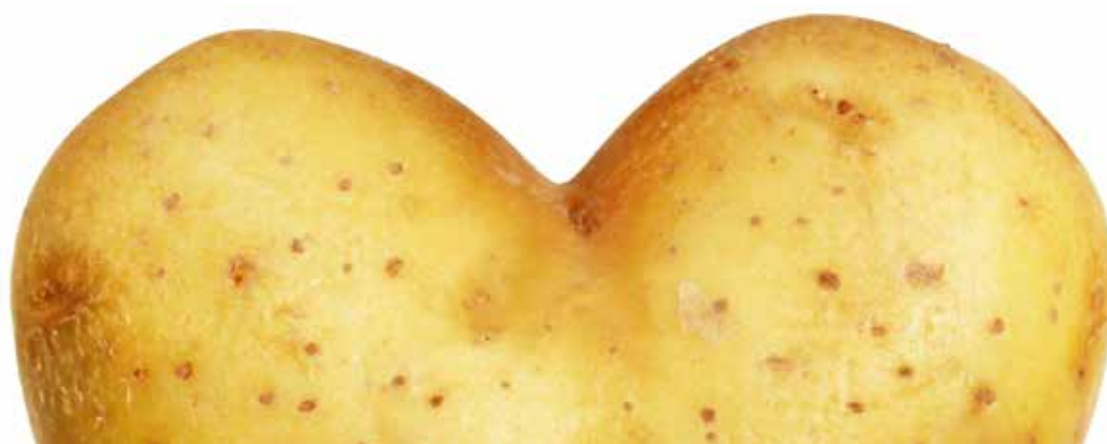
**Indeed, the EU is a net exporter of seed potatoes: in 2018, it shipped 1.5 million tonnes for a value of around EUR 777 million.** The EU was by far the larger exporter of seed potatoes, with 87% of the trade.



# National Associations



# Associated Members





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