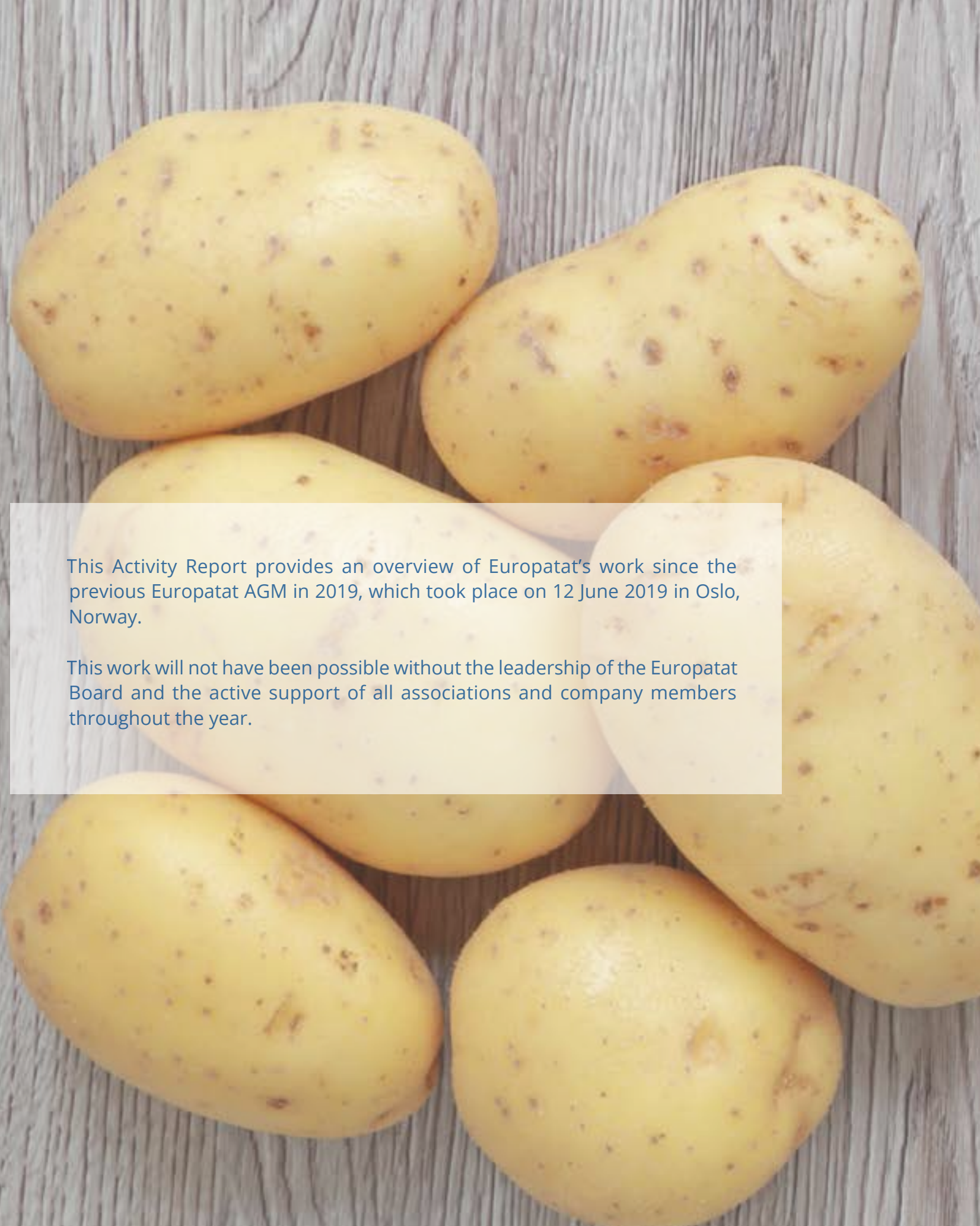




European Potato Trade Association

ACTIVITY REPORT
2019-2020



This Activity Report provides an overview of Europatat’s work since the previous Europatat AGM in 2019, which took place on 12 June 2019 in Oslo, Norway.

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.

THE ASSOCIATION

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PRESIDENT'S FOREWORD



Dear Members,

This Activity Report is released on the occasion of the 2020 Annual General Assembly of Europatat (29 June 2020), which for the first time in the history of the association could not take place physically due to the measures taken all over the continent to contain the Covid-19 pandemic. Ironically, the topic of this year's Congress "*A new age for potatoes*" was to focus on digitalisation, and what a better way to honour this topic than to hold this year AGM in a virtual format.

The current report 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. As for other European agricultural and industry sectors, the potato sector has been severely affected by the Covid-19 crisis and the rapidly changing market conditions. Whilst the consumer demand for fresh potatoes and frozen products has increased in retail sales in many markets around Europe, thousands of tonnes of potatoes for the food service could not find an outlet due to the closing of the horeca sector in most of EU countries. Next to that, and given the fact that the crisis was prolonged while potato planting season was starting, the crisis has also affected negatively the trade of seed potatoes in Europe.

The Europatat office has been very effective in taking the necessary actions to support Europatat's members, and the potato sector in general, through the crisis. From creating a coronavirus task force, to monitoring the situation, collaborating with other partners in the chain, and contacting the European authorities (notably EU Commissioner for Agriculture and Rural Development, Janusz Wojciechowski) to share information and propose measures to support the sector. Europatat also launched a social media campaign under the hashtag *#FoodHeroes* to honour the efforts that the potato sector, and in particular Europatat members, did during the coronavirus crisis.

Other important dossiers have also been very key during the last twelve months. Among them, I would like to highlight two key dossiers. The first relates to promotion, and the big success for obtaining EU co-financing to launch a multi-country programme ("*Potatoes, prepare to be surprised*") to promote fresh potatoes consumption to young consumers through social media. 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, Starch Europe, CopaCogeca) to lead the sector into phasing out CIPC in a manner that is viable.

We can be proud of this year's accomplishments of Europatat, making sure that members are well assisted in all dossiers, and that the concerns and challenges of the potato sector are heard and understood by such a large number of stakeholders. 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.

Finally, I would like to thank very warmly the Europatat team, Berta and Raquel, who throughout this year have shown the professionalism, involvement and motivation that we know them for. It is a great opportunity for all of us to have such a team, which especially in the last few months has shown perfect agility.

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.

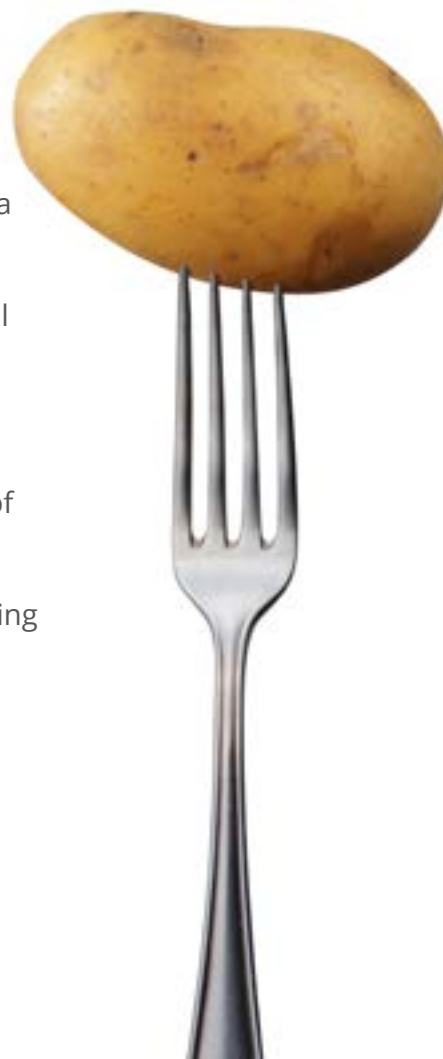
Initially set up in 1952 by national associations to protect the interests of the wholesale potato merchants, since 2010 its membership is also open to individual companies active in the trade of seed, ware and early potatoes within Europe and beyond.

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, 5 private companies have become a new direct member of Europatat, and 2 other companies and institutions have also joined the association as associated members. In total, Europatat has currently 62 members that represent 18 countries in the European Union 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 coming 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;
- Two regular newsletters including the latest information on crucial developments in the potato trade and European legislation affecting the potato supply chain, as well as on the actions undertaken by the Europatat's Secretariat;
- Services of a multilingual Brussels-based Secretariat for fast answers to key questions relating to the potato sector.

16 National Associations
40 Private Companies
6 Associated Members



Not yet a member of Europatat? Please contact us at 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!

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 continuously monitoring the discussions regarding agricultural dossiers such as the reform of the Common Agricultural Policy (CAP), the Organic regulation or the new Farm to Fork Strategy.

Towards a post-2020 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. In 2019, the European Parliament and Council continued to discuss their positions following the legislative procedure of the European Union.

The Commission's proposals on the future CAP provided that member states should start to implement their new Strategic Plans as from 1 January 2021. Given that the discussions on the proposed legislation were still ongoing in both the EU Parliament and the Council in 2019, it was very unlikely that the new legislation would be formally adopted in 2020. For this reason, the European Commission proposed in November 2019 a transitional package to ensure the continuation of the current CAP through a transitional period of one

year before the application of the next common agricultural policy. This transitional package is composed by one proposal that concerns specific issues of financial discipline and flexibility between pillars, and a second one that includes a framework which would allow for the CAP to be continued in year 2021.

During the first half of 2020, the approval of the transitional arrangements became a race against the clock, as the transitional period should enter into force ahead of 1 August 2020. On 15 May, the European Parliament's virtual plenary session backed the CAP transitional regulation, giving a go-ahead to the start of negotiations with EU agriculture ministers (a final agreement before the end of June is the goal). According to MEPs, the duration of the transitional period starting on 1 January 2021 should be by default one year. However, they introduced a flexible mechanism to prolong this period by another year in case that the future EU's long-term budget (MFF) and CAP are not agreed and approved by 30 October 2020.

In the past 12 months, Europatat has monitored the development of the discussions and has also 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 to inform its members properly.



**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?**

Think sustainable –
use **VELUM® Prime!**

Your solution for safe and
effective nematode control

- Low application rates
- Unique safety profile for sustainable agriculture
- Gentle to soil and to beneficial organisms
- Flexible application techniques
- Reduced operational costs



VELUM®
PRIME



*Consult country registration status, local registrations may differ.
Use plant protection products safely.
Always read the label and product information before use.*



Market Transparency

Following the recommendations of the Agricultural Markets Task Force to better distribute the added value across all levels of the food supply chain, the European Commission published on 1 October 2019 the Implementing Regulation 2019/1746 on Market Transparency. The regulation, which will apply from 1 January 2021, imposes new price reporting obligations to EU Member States (MS) on agricultural products such as meat, dairy, wine, cereals, oilseeds and protein crops, fruit and vegetables, olive oil and sugar sectors. The new measures on collection of prices of agri-food products at different stages along the supply chain (production, processing and retail) do not apply to potatoes.

Through 2019, Europatat participated in various meetings and seminars organised by the European Commission to gather feedback from EU organisations on the benefits and cons of collecting and disseminating price-related information. Europatat also met EU officials from the Directorate General for Agriculture (DG AGRI) in charge of markets and observatories to get hold of the Commission's proposal before being officially published.



Organic farming: new EU rules adopted

Given the serious impact of the Covid-19 crisis on EU's agriculture, EU Member States agreed in May 2020 to postpone Regulation (EU) 2018/848 on organic production and labelling of organic products (which should enter into force on 1 January 2021) by a year (as from 1 January 2022). At the same time, the new deadline for the European Commission to finalise and publish pending secondary legislative acts (implementing and delegating acts) is now March 2021.

The move, which was also backed by the organic sector, was requested by the European Parliament. According to MEPs in the European Parliament's Agriculture Committee (COMAGRI), more time was needed to ensure that the necessary complex system of delegated and implementing acts is in place and member states and operators are given enough

time to make a successful transition to the new improved system of organic production. In a letter to Commissioner for Agriculture Janusz Wojciechowski, they pointed out that rushing the adoption of this piece of legislation was not the most suitable solution. The letter also said that even considering the difficulties imposed by the Covid-19 outbreak, ensuring an additional year for the enactment of the secondary legislation could make this already strong policy even stronger and further contribute to the common goal of sustainable food production.

As a next step, the European Commission will present the proposal to postpone the implementation of the Organic Regulation to the European Parliament and the Council. The procedure will take few months before the decision is formally adopted.

Europatat will continue 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.

Promotion and consumption

Europatat promotes fresh potatoes among European millennials

Fresh potatoes remain Europe's most popular main meal carbohydrate and are deeply anchored in the food habits of the European Union, however nowadays they face two main obstacles: a long-term decrease in their consumption; and a stagnation of their image as a traditional food. This trend has led to a decrease of potato consumption among the different age groups, especially in people between 18 and 34 year old living on their own, co-habiting or with young families (the so-called millennials).

To slow down this consumption trend, Europatat, together with the French, Irish and Flemish promotion bodies CNIPT, Bord Bia and VLAM, has launched the European campaign ***"Potatoes, prepare to be surprised – Europe's favourite since 1536"***. This joint initiative, which is co-financed by the European Commission under the EU promotion policy, aims to encourage the consumption of fresh potatoes among millennials in Flanders (Belgium), France and Ireland. Young consumers in other EU countries are also reached thanks to the translation of recipes in Italian, German, Spanish and Polish.

To inspire millennials, one hundred new surprising potato recipes a year are shared on various social media channels as well as on the website preparetobesurprised.eu. Instagram acts as the backbone of the campaign, but other social media platforms such as Facebook, Pinterest or YouTube are also used to provide tips and tricks on how to easily integrate potatoes into millennials' daily lifestyle. Furthermore, a series of events or "potato surprises" will be organised in Flanders (Belgium), France and Ireland to draw millennial's attention to the surprising versatility of potatoes.

Potatoes fit in any modern, healthy and sustainable lifestyle because they are a tasty, versatile and have good nutritional and health benefits. However, it is believed that many young European have large gaps in their information and general knowledge around potatoes. As such, the element of surprise is employed as a key component of this campaign by revealing surprising facts and new recipes across different social media platforms in various European countries.

Are you prepared to be surprised? Follow us!

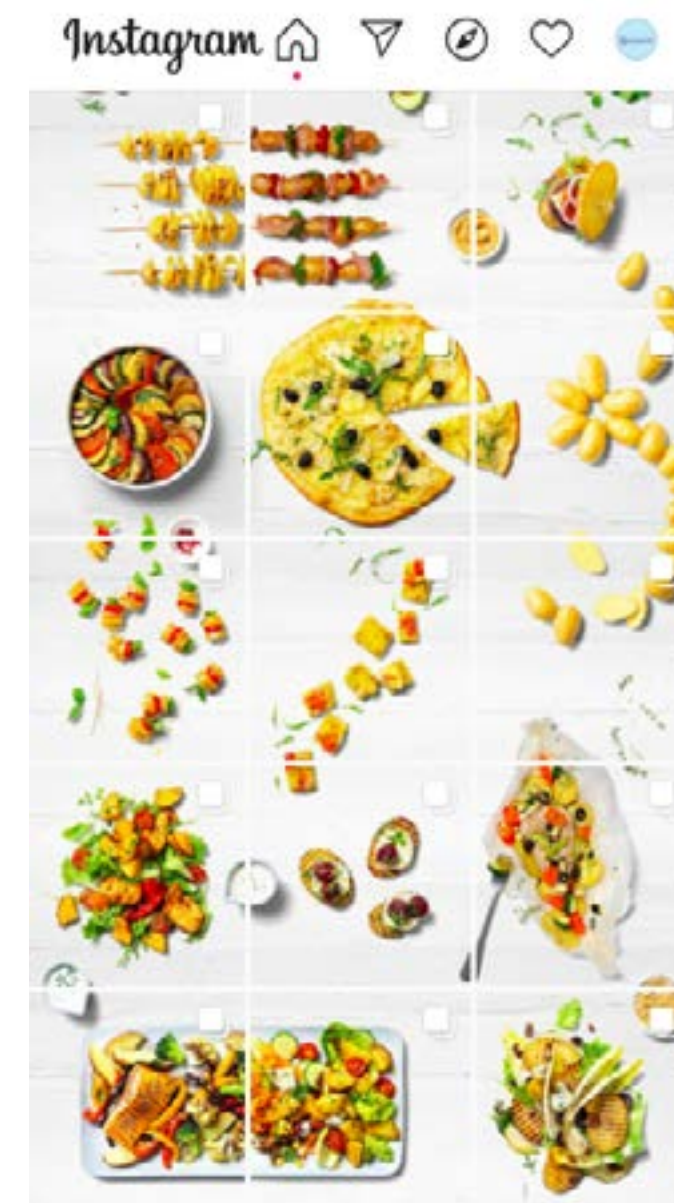


EU promotion policy -

2021 Annual Working Programme

The European Union promotion policy sets out how EU funding can be used for information and promotion initiatives for European agricultural products inside and outside the EU. In order to ensure that the priorities for each year calls for proposals reflect the particularities of the potato sector, Europatat contributes to the drafting of the Commission's annual work programmes, which establish the main priorities and budget lines of the promotion policy.

During the period covered by this Activity Report, Europatat sent once again its comments to the European Commission ahead to the adoption of the 2021 Annual Work Programme. For 2021, the budget provided by this policy could reach again its maximum potential: €201 million.



Plant Safety

European plant health policy is one of the major policy dossiers for Europatat. The year 2019 was a turning point with the entry into force of the new plant health and official controls legislation. These acts represent major elements of the overall legal framework contributing to the protection of public, animal and plant health in the EU. The European potato sector was well prepared and ready for this important change.

Plant Health: New legislation in place

Regulation (EU) 2016/2031 on protective measures against plant pests is applicable since 14 December 2019. The new rules aim to modernise the plant health regime, enhancing more effective measures for the protection of the Union's territory and its plants. They also aim to ensure safe trade, as well as to mitigate the impacts of climate change on the health of our crops and forests. The regulation lists the main pests and defines them into two categories:

- Quarantine pests, which are the most dangerous ones for the Union territory, and which require eradication;
- Quality pests which affect plants but do not require eradication.

The new rules also include measures to tackle pests from non-EU countries. The Commission will be able to implement precautionary measures for emerging risks from plants coming from certain non-EU countries. A category of 'high risk' plants, plant products or other objects is created: those are plants, plant products or other objects which present, on the basis of a preliminary assessment, a pest risk of an unacceptable level for the EU territory. Therefore their introduction into the Union territory from a third country shall be prohibited, pending the completion of a full risk assessment.

The new rules also propose to extend, simplify and harmonise the existing plant passport scheme. This means that an extended range of plants, plant products or other objects need:

- a phytosanitary certificate before being imported into the EU (attesting the conformity with the Union legislation)
- a plant passport for movement within the EU



Plant passports are also needed for all movements between professional operators, but not for sales to final non-professional users.

Finally, the new rules would also require relevant professional operators to be registered. Operators will be listed in a single register, thus reducing the regulatory burden for operators.

Several delegated and implementing acts were adopted by the Commission in 2019 to ensure the correct implementation of the legislation across EU Member States: Lists of pest, commodities and plant health requirements; Regulated plants; High risk plants; and Priority pests.



Official Controls: Modern and transparent

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 became applicable on 14 December 2019. The new Official Controls Regulation (OCR) brings together disparate rules into a single Regulation and offers more targeted, risk-based controls along the agri-food chain. With its broader scope and new IT based tools, it provides for a modernised, integrated and efficient system to intercept risks related to public health, plant health, animal health and welfare. The new legislation is based on existing principles, such as: a risk-based approach to controls, and early detection and prevention. The new legislation also makes enforcement more efficient by the introduction of a new computerised system (IMSOC), which integrates existing computerised systems, including the RASFF system.

- Entry into the Union: The Official Controls Regulation establishes a common framework for carrying out border controls; less burdensome for competent authorities and businesses alike; ensuring more consistent checks on commodities entering the EU market.
- 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.
- Additional rules on border controls: Strengthened rules on intensified and temporarily increased border controls. Common requirements for e.g. prior notification, transit and transshipment and the frequency of border controls. New rules on wood packaging material entering the Union, where the outcome of controls will be recorded in IMSOC.

Europatat, in coordination with its members, will monitor the practical application of these new legislative acts and provide 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.

2020 is International Year of Plant Health



Plants are the source of the air we breathe and most of the food we eat, yet how to keep them healthy is often ignored. This can have devastating results: the Food and Agriculture Organization of the United Nations estimates that up to 40 per cent of food crops are lost due to plant pests and diseases annually. This leaves millions of people without enough food to eat and seriously damages agriculture—the primary source of income for rural poor communities.

For these and more reasons, 2020 has been named the International Year of Plant Health by the United Nations General Assembly.



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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.

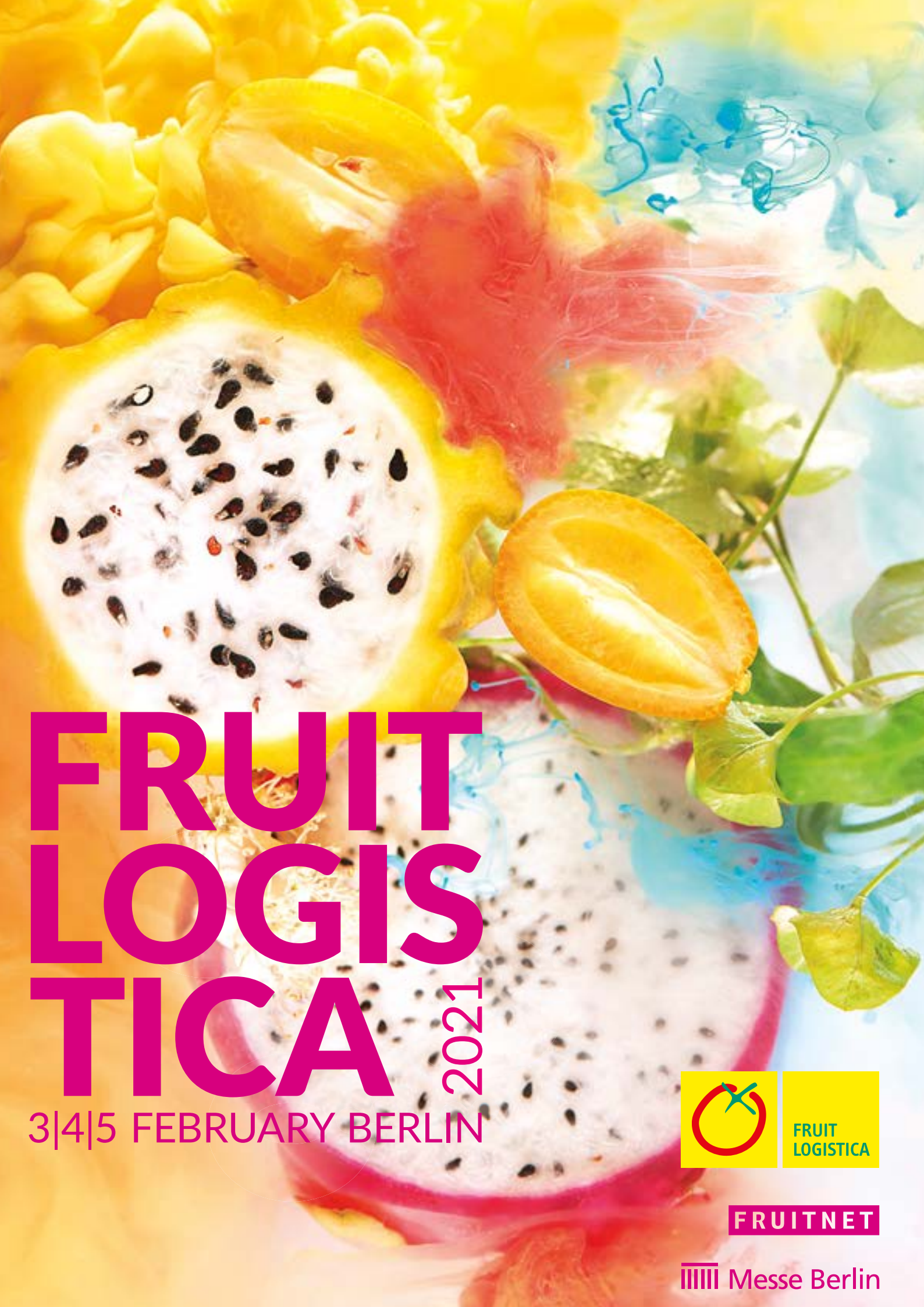
Besides this, Europatat advocates for the adherence of other relevant policies for the European Food System (such as the sustainable development goals referring to food security or climate change), so that the sustainable role of potatoes is also considered. In this sense, the 'Farm to Fork' Strategy, which targets the whole food chain, should support the food sector to provide Europeans with high quality, nutritious, affordable and safe food in a more sustainable way.

The ongoing re-evaluation (REFIT) of the European food safety legislative framework will provide an opportunity to reassess the European regulations (EC) 1107/2009 on placing on the market of active substances and (EC) 396/2005 on MRLs and will assess how to ensure a high level of consumer protection. The European Commission's Report will show whether the two regulations fulfill their objectives and whether the ambitions of the new European Green Deal could be achieved within the current legal framework.



There will also be an evaluation of Food Contact Materials: This evaluation scrutinises all aspects of the current EU food contact materials legislation, including the effectiveness of the declaration of compliance, which is currently required for specific measures at EU level. On the basis of this evaluation, the Commission will consider if further measures are necessary at EU level, including consideration of a common European requirement for a declaration of compliance for all types of food contact materials.

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.



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Plant Protection Products

The availability of plant protection products 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 monitors and informs 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.

CIPC

The European Commission recently decided on the non-renewal of the active substance chlorpropham (CIPC) on the basis of a report published by the European Food Safety Authority (EFSA). This means that CIPC can no longer be used among other things, as a germination inhibitor, for potato storage beyond the 2019-2020 season. The European potato sector therefore faces a considerable challenge in the 2020/2021 campaign. However, thanks to the cooperation at European level of several organisations, including Europatat, and the exchange of knowledge, a plan for the future has been developed.



Indeed, Europatat joined other relevant associations of the **European Potato Value Chain** to request the approval of a temporary MRL (tMRL) as, even after stopping its use, there is a risk of cross contamination as the substance can persist on the walls and floors of the warehouses where potatoes are stored and packaged. Regardless of the grant of a temporary increase in the MRL, the European potato sector will make sure of the following:

- Prohibition of treating potatoes with CIPC from the 2020 harvest and obligation to comply with current legislation
- Cleaning of warehouses and equipment that have been in contact with CIPC
- Duty to provide information on cleaning efforts
- Monitoring (following a sampling protocol)

In this regard, the European Potato Value Chain has developed a Potato Storage Cleaning Guidelines, which will help farmers, traders and processors to avoid cross-contamination as much as possible, and reduce CIPC residues on potatoes stored from the 2020-2021 season. At the same time, the European Commission also requested a revision of the 30 ppm Codex Alimentarius global standard so that the issue can reach the rest of the world.

While we are awaiting the final decision of the European Commission on the temporary MRL, from Europatat we are convinced that, if we have a good framework, we will be able to make the transition within the sector.



Trade

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

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.

2020, the year of the Coronavirus crisis

The World Health Organisation recognised the Covid-19 disease as a global pandemic on 11 March 2020, leading worldwide authorities to implement travel restrictions, quarantines, curfews and stay-at-home orders, workplace hazard controls and facility closures. With more than a third of the global population being in lockdown, the pandemic led to a severe global socioeconomic disruption that has caused the largest worldwide recession in recent history.

As it was the case for other European agricultural and industry sectors, the potato sector was severely affected by the coronavirus crisis and the rapidly changing market conditions. Precautions were taken in almost all EU countries, with measures including working from home, closure of restaurants, warehouses not working at full capacity because of the space that must be kept between the employees, carriers who have to stay in their trucks and road traffic in Europe hampered by internal border controls. All those affected farmers and the full potato value chain.

More concretely, the crisis hit the potato sector in two different ways. Whilst the retail demand for fresh potatoes and frozen products increased in many markets around Europe, frozen products' demand for the food service demand fell due to the closing of restaurants/food service outlets around Europe. Potato processors were left with high stocks and needed to divert product elsewhere. At the time of writing this activity report, some countries had already started a relaxation of restrictions in view of a possible return to some sense of normality. However, social distancing would still be encouraged for the rest of the year, which means that restaurants could be one of the last sectors to get back to normal.



Since the beginning of the crisis, Europe's food supply chain worked closely together to ensure everybody in Europe continued to have access to safe, quality and affordable food and drink products during the Coronavirus pandemic. In the case of the potato sector, a **Europatat's coronavirus task-force** was put in action (including regular contacts between the Secretariat and the Board) to support Europatat's members and the potato sector in general through:

- Monitoring of the situation both in terms of European Union response to the crisis, as well as on the ground information from different sources;
- Collaboration with other partners in the potato chain to raise awareness of the difficulties and requests for the sector;
- Contacts with the authorities to share information and propose measures to support the sector.

In this sense, Europatat, together with EUPPA (European Potato Processors' Association) and ESA (European Snack Association), sent a letter to Janusz Wojciechowski, EU Commissioner for Agriculture and Rural Development, requesting for his support for the potato sector in view of a High-level EU meeting on the impact of Covid-19 on food supply chain that took place on 25 March 2020. Europatat also supported a joint statement released by the European organisations CopaCogeca, FoodDrinkEurope and Celcaa (of which Europatat is a member) urging the EU to ensure food security amid the pandemic outbreak by taking action to avoid agri-food trade disruption.

Europatat also launched a social media campaign under the hashtag **#FoodHeroes** to honour the efforts that its members made during the crisis not only to keep the potato supply chain running but also to help combat Covid-19.



"At Europatat we are proud of our members and potato traders in all branches who stepped up to the plate and worked hand in hand with the other actors in the food supply chain to ensure everyone in Europe had access to safe and quality potatoes!"



The Irish Potato Federation is pleased to support the 2021 Europatat Congress.

IPF MEMBERS	WEB	TELEPHONE
Castlecor Potatoes	www.castlecorpotatoes.ie	+353 22 48228
Country Crest	www.countrycrest.ie	+353 1 8437061
IPM Potato Group	www.ipmpotato.com	+353 1 2135410
K&K Produce	www.kkproduce.ie	+353 1 8347586
Meade Potato Co	www.meadepotato.com	+353 46 9053198
O'Shea Farms	www.osheafarms.com	+353 51 643152
Peter Keogh & Sons	www.keoghs.ie	+353 1 8433175
Sam Dennigan & Company	www.samdennigan.ie	+353 1 8010500
Seed Potato Co	www.seedpotato.ie	+353 1 8425055



EU-UK Future Trade Agreement

Following the Council's green light to the opening of negotiations for a new partnership with the UK, in February 2020 Europatat sent a position paper to the EU-UK negotiation team, as well as to the relevant officials in DG AGRI and DG SANTE, on which the sector called on the European Commission to make a priority the amendment of current EU legislation in order to include the UK as one of the third countries from which the EU can import seed and ware potatoes. On 12 June 2020, Europatat received an official answer by the EU Task Force for Relations with the UK, run by chief negotiator Michel Barnier, on which it called on EU companies to take now the operational decisions to mitigate the impact of the end of the transition period.

In March 2020, the EU and the UK started negotiating the terms and conditions of their future trade relations, which are intended to come into place once the transition period following 'Brexit' lapses at the end of 2020. The second round of negotiations was officially scheduled from 18 to 20 March 2020, but had to be cancelled due to the Covid-19 pandemic. After that, the following round of negotiations were held via video conferences. At the time of writing this Activity Report, the last discussions took place in mid-June 2020. After the EU-UK high level meeting held on 15 June, both a EU Declaration and a UK Declaration were published.

The main messages of these declarations are the following:

- The Parties noted the **UK's decision not to request any extension to the transition period**. The transition period will therefore end on 31 December 2020, in line with the provisions of the Withdrawal Agreement.
- The Parties agreed on intensifying the talks in July to create the most conducive conditions for concluding and ratifying a deal before the end of 2020.

Europatat members are highly concerned by the future of trade in potatoes between Member States of the EU-27 and the UK. With a home production of about 5,5 million tonnes of fresh and seed potatoes (representing about 10% of the total EU-28 production), the UK imports annually about 255.000 tonnes (EUR 112 million) of fresh or seed potatoes, of which around 191.000 tonnes (EUR 84 million) are from the EU-27 countries. This means that for the EU-27 the volume/value of fresh and seed potatoes sent to the UK represents around 12% in volume and 13% in value of all its exports. Whereas for the UK these imports represent 75% – both in volume and value – of all its potato imports.

Regarding UK exports of potatoes (which total about 295.000 tonnes and EUR 138 million), these concern mostly seed potatoes, and almost 70% in volume (around 205.000 tonnes) and over 60% of value (around EUR 84 million) is sent to the EU-27 countries.

Therefore, it is of outmost importance for our sector that the negotiations results in securing the most stable situation as possible on what refers to volumes and values currently traded, and that the EU-27 operators do not loose competitiveness in the UK and international markets.

Free Trade Agreements

The international Free Trade Agreements (FTAs) 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 Mexico, New Zealand, Australia and Indonesia.

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.

Digitalisation of procedures and certifications

On 2 February 2020, the EU published its Communication 'A European strategy for data', which sets out how to create a "genuine single market for data, open to data from across the world", in which data is secure and businesses have "easy access to an almost infinite amount of high-quality industrial data".

New chapters on digital trade are being seen in trade agreements concluded by the European Commission to provide rules on electronic commerce and electronic transactions. Regarding market access, digital trade includes the principle

of non-discriminatory treatment of digital products, customs duties on electronic transmissions, cross-border data flow regulation, the facilitation of electronic transactions (e.g., electronic contracts and signatures), consumer protection, data protection and privacy, cybersecurity, access to government data and the protection of source codes. Digital trade should provide legal certainty by guaranteeing that electronic contracts, signatures, or digital certificates, are legally valid. The increasing relevance of the digital sector in trade is undeniable and such provisions are poised to become standard in future EU trade agreements.

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:
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Sustainability

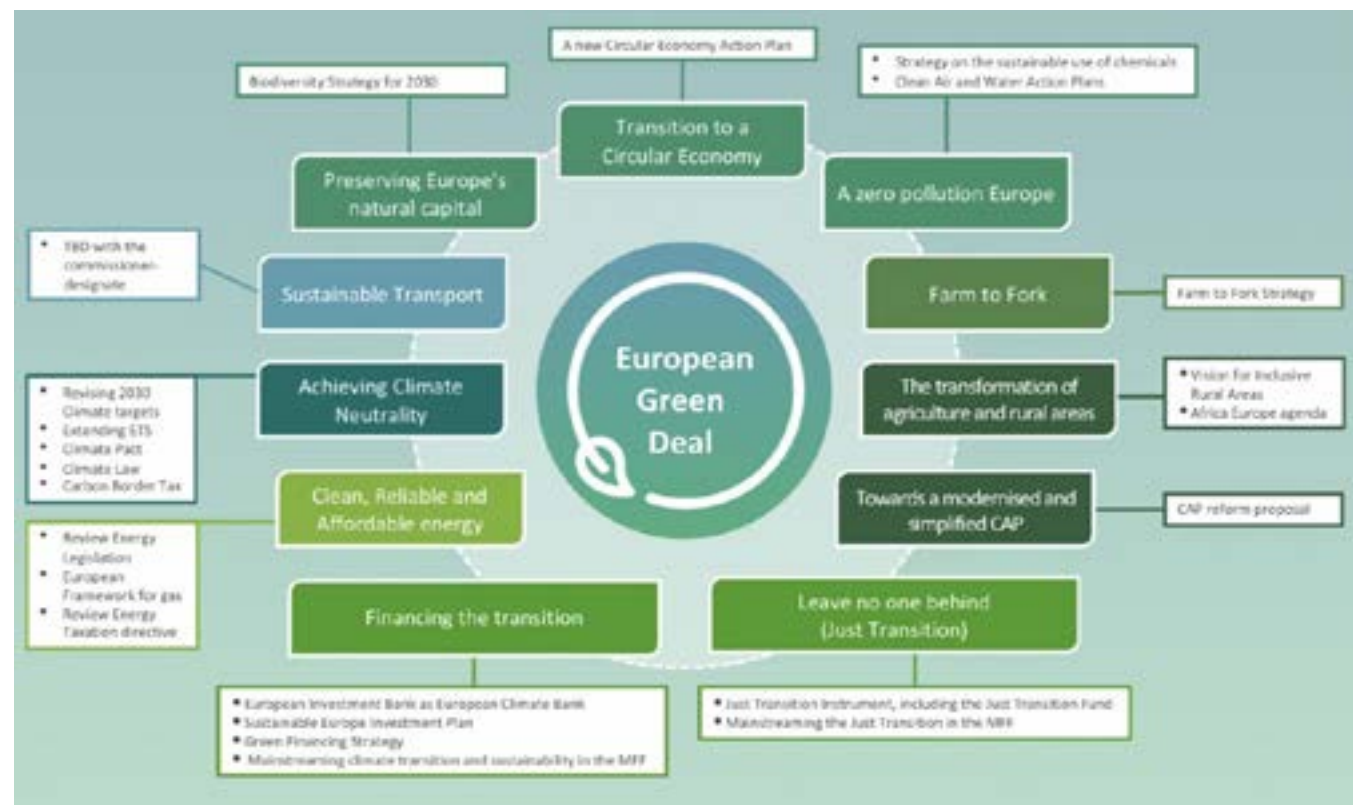
The concern regarding sustainability along the food supply chain has been increasing in the political agenda in the past years. There is a need to secure a fair, healthy and environmentally-friendly food system, a message that the potato sector fully endorses. In this sense, Europatat members are already taking responsibility towards relevant EU ambitions such as the transition to a circular economy including the reduction of plastic packaging and food waste, or a more sustainable use of chemicals and transports.

Europe goes green

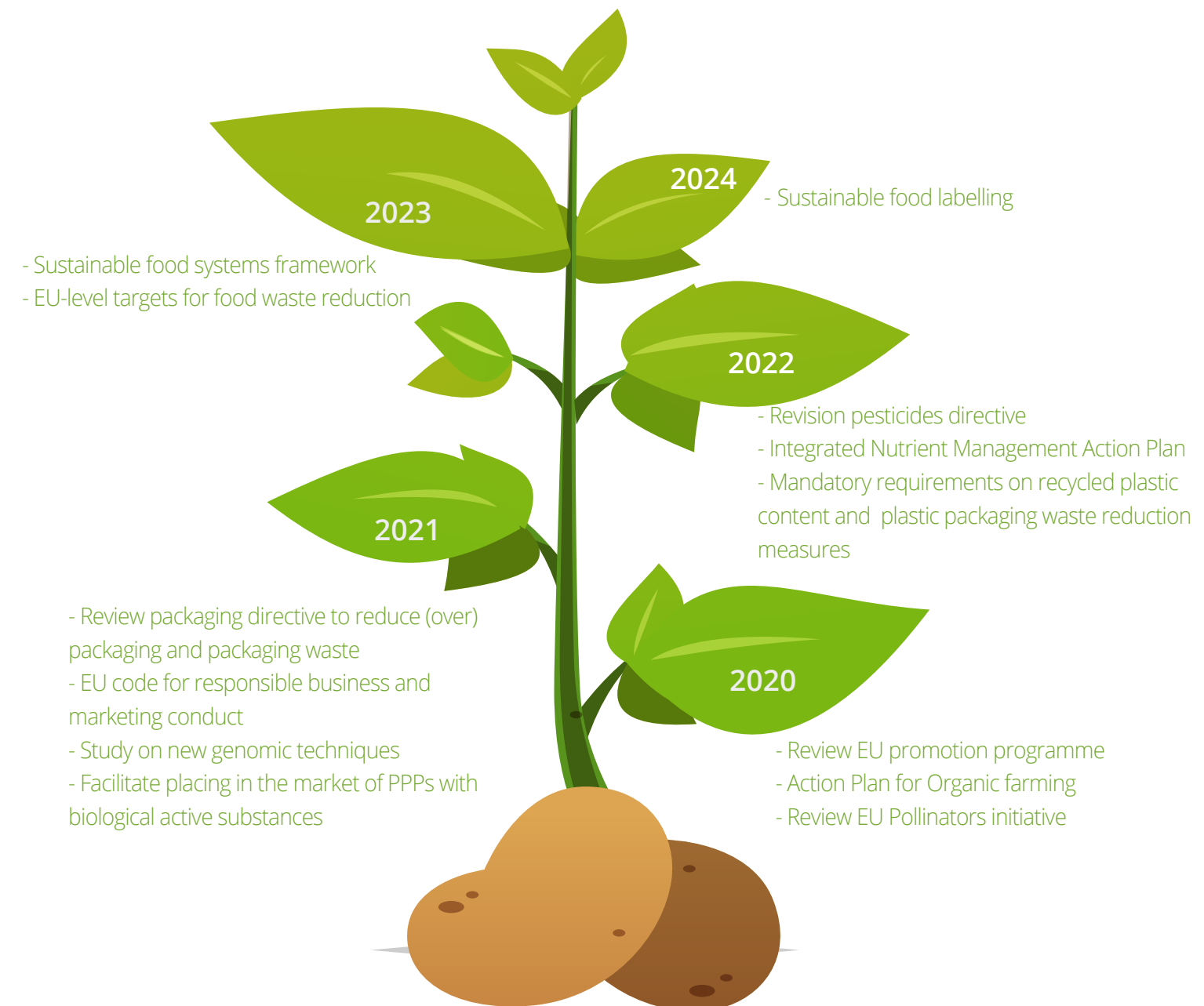
The European Commission unveiled in December 2019 the Communication on the European Green Deal – a roadmap with specific actions for Europe to become the first climate-neutral continent by 2050. The Green Deal explains the initiatives that the Commission will present progressively over the next few years to move to a clean and circular economy that can stop climate change, revert biodiversity loss and cut pollution.

The European Green Deal covers all sectors of the economy, including food production. In May 2020, the Commission published a “Farm to Fork” Strategy

to improve the sustainability of the agriculture and the food distribution systems in Europe. The new strategy includes several non-legislative and legislative measures to reduce the environmental and climate footprint of the food system and strengthen its resilience. On the same day, the Commission also unveiled a new Biodiversity Strategy for 2030 that aims to tackle the key drivers of biodiversity loss (unsustainable use of land and sea, overexploitation of natural resources, pollution, and invasive alien species).



Green Deal initiatives timeline



Given that Europatat members will be directly concerned by the “Farm to Fork” Strategy, Europatat contributed to the consultation launched by the European Commission in March 2020 on the roadmap of the strategy. Whilst Europatat welcomed the fact that a coherent European policy and regulatory framework for sustainable food systems will be developed, the association also called on the Commission to take a pragmatic and realistic approach, ensuring that the new regulatory measures under this strategy are coherent with the current EU legislation and the alternatives already available in the market.

In the coming months, Europatat, in coordination with its members, will accentuate its actions on this dossier to defend the interest of the sector through the monitoring of all new legislation, as well as by providing direct input to the European Commission in bilateral and public meetings (particularly DG AGRI's Civil Dialogue Groups on CAP and Quality and Promotion, DG SANTE's Advisory Group on the Food Chain on Animal and Plant Health and EU Platform on Food Losses and Food Waste, and EFSA's Stakeholder Forum) as well as in written via official consultations.

Tackling Food Waste in the potato sector

The European Union 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. To support the achievement of this SDG target, the European Commission adopted in May 2019 a Delegated Act on food waste measurement that establishes a common EU methodology to measure food waste. In December 2019, the Commission also published the Recommendations for action in food loss and waste prevention, a document that compiles actions to prevent food waste in each stage of the food supply chain.

As an active member of the EU Platform on Food Losses and Food Waste, Europatat contributed to the preparation of both initiatives through the participation in the related public consultations and by sending its comment directly to the EU Platform.

Food waste should be reduced as much as possible, a message that the potato sector fully endorses. European potato traders have a very positive story to tell about the efforts being made to avoid and reduce food waste. In this sense, the results of a survey launched among Europatat company members in the second half of 2019 show that

70% of the respondents already have in place specific strategies to reduce potato waste and the environmental impact of their businesses. This survey also shows that the amount of potato waste among these companies is mainly below 5%. The findings of the survey “Good practices on reducing food waste among Europatat members” will be made public in the Summer of 2020.

Europatat can confirm that its members are actively taking responsibility for waste reduction, and that they will keep doing that in the years to come!



Plastic packaging or not, that is the question

The growing concern about the proliferation of plastics in the environment has led the European Union to adopt two important pieces of legislation in the last years with the aim to reduce plastic waste in Europe. According to the EU Plastics Strategy adopted in January 2018, all plastic packaging placed on the EU market should be reusable or easily recyclable by 2030. Moreover, the Directive on the reduction of the impact of single-use plastic products on the environment that was formally approved in May 2019 will ban the use of certain throwaway plastic products for which alternatives exist. Single-use plastic products are made wholly or partly of plastic and are typically intended to be used just once or for a short period of time before they are thrown away. Some examples of these kind of products are food containers or meal salad boxes used to contain food in single-serve portions for immediate consumption (on-the-spot or take-away); typically consumed from the receptacle; and ready to be consumed without any further preparation (i.e. cooking, boiling or heating).



Since the publication of these two EU initiatives on plastics and single-use-plastics in Europe, Europatat has been monitoring the state of play of the political discussions around this topic and analysing the implications for its members. During the last twelve months, Europatat has also consulted with its members on the alternatives for plastic packaging already available in their countries and given the possibility to discuss this at the association's internal meetings, mainly at the Packers Commission meeting on 12 June 2019 in Oslo and on 5 February 2020 in Berlin.



Europatat can confirm that reducing plastic packaging while ensuring that no food waste is generated is one of the objectives of its members. European potato packers are already testing and using alternatives to reduce the use of virgin plastic in packaging such as bags made from 50% sugar cane or packaging made of cellulose film and biodegradable paper. The potato sector is thus contributing to a more efficient food supply chain, and Europatat's members are committed to respond to current opportunities and social demands that are reflected in new EU regulations such as the “Farm to Fork” Strategy or the Circular Economy Action Plan.



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Research and 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.

Horizon 2020 and Horizon Europe - EU's R&I programmes

Over the last years, the European Commission has spent increasingly more attention to Research and Innovation, via its flagship initiative 'Horizon 2020' that has been running since 2014. For 2020, the final year of the programme, the Commission announced the last and biggest annual tranche: €11 billion.

In January 2019, Europatat participated for the first time ever in the submission of research projects under Horizon 2020. After the Commission's evaluation of the proposals, the project ADAPT (Accelerated Development of multiple stress tolerAnt PoTato) was approved. The four-years initiative, which is led by the University of Vienna and in which other four Europatat's members are also involved, will identify molecular mechanisms of adaptation to combined stress in potato to develop new strategies for the improvement of productivity, yield stability and product quality under multiple stress conditions. Europatat will act as disseminator of the project's resulting shared knowledge. The ADAPT project is set to start in July 2020.

For the years to come, the European Commission is preparing the next R&I framework programme (2021-2027), Horizon Europe. Whilst a provisional agreement on the ambitious €100 billion next EU research programme was reached between the European Parliament and Council in the Spring of 2019, the final adoption of the regulation will only take place once an agreement is reached on the next multiannual financial framework (MFF). At the time of writing this activity report, the discussions around the MFF were still ongoing.



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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- ◉ Bag size: small and medium ◉ Print quality: flexo- and/or heliographic ◉ Pour spout/easy opening
- ◉ Windows: different types ◉ Perforations ◉ Application of an adhesive label
- ◉ Pre-cut opening of the bag ◉ Euro-Hole ◉ Edge sealer
- ◉ SAP bar code pallet identification

ROLLS

Specifications Rolls

- ◉ Single-or multi-ply ◉ Biodegradable complexes
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New plant breeding techniques (NPBTs): uncertain future

In November 2019, the Council asked the European Commission to prepare a study on the status of new genomic techniques under EU law, by 30 April 2021, so as to minimise legal uncertainties in this area. Since the beginning of 2020, the Commission started carrying out targeted consultations with Member States and EU-level stakeholders, including Europatat, to gather information for this study. The main question that needs to be addressed is whether products developed using gene editing should be regulated on the basis of the process or the final product's characteristics, or whether a hybrid approach should be taken.

As food safety is a sensitive matter of primary concern to all Union citizens, any policy initiative in this field should not only be informed by the findings of the Commission study and the respective public consultations, but also be grounded in the principles introduced by Regulation 2019/1381 on the transparency and sustainability of the EU risk assessment in the food chain. There is also a need to accommodate conflicting value frames by broadening the scope of the risk assessment framework and/or by transforming ethical or socio-economic considerations into substantive regulatory standards.



Europatat has joined forces with other likeminded associations to defend the sector's view on the topic. Europatat position is for the protection of a high-performing, innovative and diversified European plant breeding industry. The association supports a reasonable approach towards new breeding techniques in line with the recommendations of Member States' Experts and the vast majority of scientists.



PUBLIC AFFAIRS & NETWORKING

Connecting the sector

Europatat Congress 2019

On 13 June 2019, the European potato community gathered in Oslo, Norway, for the Europatat Congress 2019. Under the slogan *"The timeless potato: A dynamic and innovative food"*, the annual event organised by Europatat, the European Potato Trade Association, and NFGF, the Norwegian Association of Fruit and Vegetable wholesalers, focused on the many assets of the sector in innovation, sustainability and circular economy. Key speakers from both the business and the Norwegian public authorities shared with the Congress' participants their insights on these important topics in a unique event organised for the first time ever in Norway. With more than 100 participants from 15 different countries, the Europatat Congress 2019 and social side events received an extremely positive feedback, remarking the high quality of the speakers and their refreshing and inspiring messages.



Europatat Congress 2020 - Cancelled

For 2020, the Europatat Congress was due to take place on 11 and 12 June in Brussels, Belgium. Although the preparations and registrations were advancing at a good pace, Europatat decided to cancel this event following the escalation of Covid-19 crisis in Europe.

The next Europatat Congress will take place on 30 and 31 May 2021 in Dublin, Ireland, within the framework of the World Potato Congress (WPC).

The WPC expects to gather 1,000 participants from all across the globe, including growers, researchers, producers, traders, processors and manufacturers. Both the Europatat Congress and the WPC will become a week-long focus on the potato, the third most important food crop in terms of global consumption.



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.

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.

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.

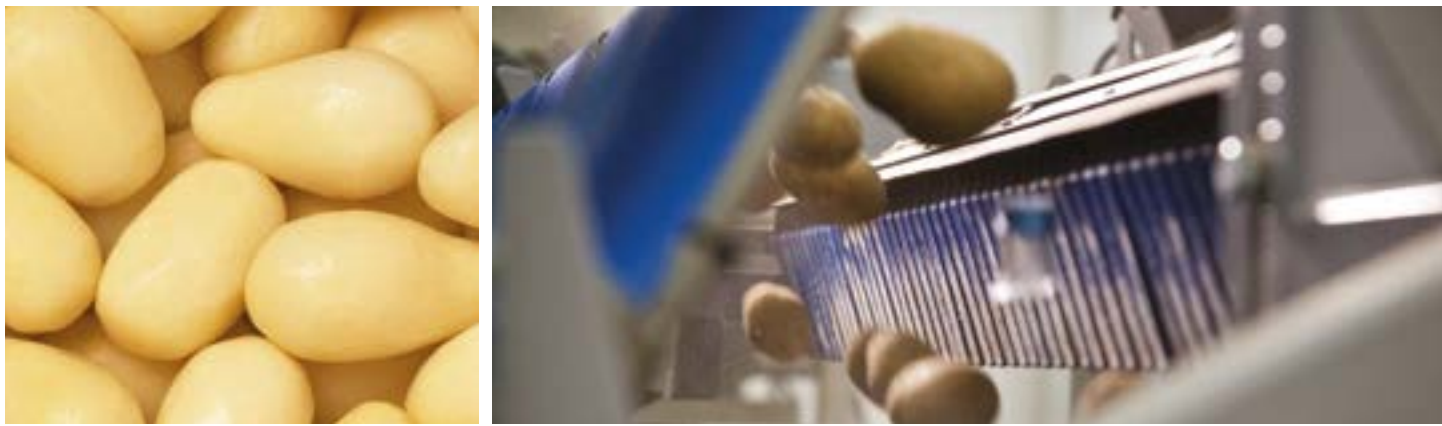


Meetings with industry stakeholders

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), FRUCOM (dried fruits and nuts) and UNION FLEURS (flowers).



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COMMUNICATION

Information flow is 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

In 2019 Europatat developed a new Communication Strategy to outline the strategic use of the different tools used for internal and external communication for the years to come. The main internal communication tools that Europatat currently uses 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 were also implemented.

Improving Europatat's visibility

In order to increase the Association's visibility and highlight the latest activities of the Secretariat, a new newsletter called "Europatat Insights" has been circulated within all Europatat contacts (internal & external) once every two months since February 2019. The Europatat Insights newsletter currently reaches more than 500 subscribers. An archive of the 2019-2020 issues of the newsletter is available [here](#).

The Secretariat is also continuously updating the official website www.europatat.eu and being active on Twitter, LinkedIn and Instagram with one main goal: to stay in touch with stakeholders, policy and decision makers and, more generally, to connect with people interested in the sector and the work that Europatat is doing.

In addition, Europatat once again had a booth at this year's 2020 Fruit Logistica fresh produce trade show to present the work of the association and multiply contacts with the sector. With the same objective, Europatat also participates in other European fairs such as Fruit Attraction in Spain, Potato Europe in Belgium or the Potato Variety Days in the Netherlands.



Europatat and its members





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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
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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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Potato sector data

World production and trade

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 Ukraine and Russia following closer.

Revised FAOSTAT data shows that the increase in world potato production stalled in 2018. World production reached 368.247 million tonnes in 2018 (only 1.5% up on the year before). However, that was still the third highest total ever after 2017 and 2014.

According to the latest estimations made by the World Potato Markets, a similar increase could be expected for 2019. In 2020, the crop area might be reduced because of the impact of Covid-19 new consumption trends.

2018 Top potato world producers

China	90.321 MT (+2% than in 2017)
EU 28	52.253 MT (-16.3% than in 2017)
India	48.529 MT (-0.2% than in 2017)
Ukraine	22.395 MT (+1.3% than in 2017)
Russia	22.504 MT (+3.2% than in 2017)



World potato trade reached a new record in 2019. During that year 24.845 million tonnes of potatoes (including seed and potato products) with a value of €14.781 billion were shipped worldwide. This means a 4.1% increase on volume and almost a 15% increase on value of the shipments (the highest total ever). Fresh potatoes were the largest traded potato category by volume (around 12.5 MT exported in 2019), while frozen fries were still by far the largest category by value.

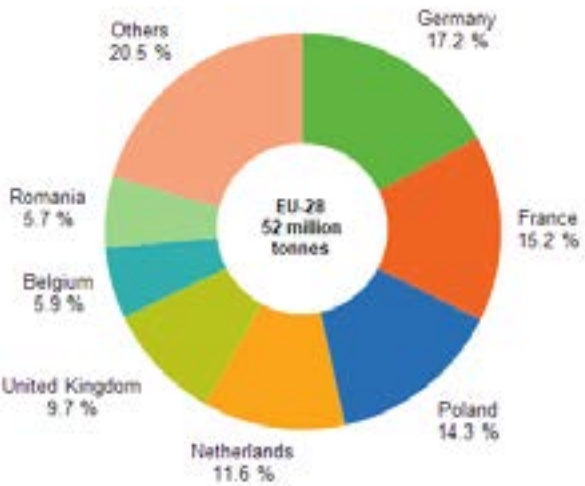
Due to the global impact of the Covid-19 crisis, both potato production and trade will inevitably suffer a drop in 2020.



European production and trade

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 slipped 14.6% in that year. Following this drop, 52.253 million tonnes of potatoes were harvested in the EU-28 in 2018, 16.3% less than in 2017 (according to official Eurostat data). Belgium, France, Germany, the Netherlands and the UK accounted for half of the EU 28 plantings in 2018 and 60% of its potato production. If Poland is added to the five, these six countries accounted for two thirds of the EU potato area and almost three quarters of production.

Production of potatoes, including seed potatoes, by main producing EU Member States, 2018 (% of EU-28)



Source: Eurostat (online data code: apro_cpsh1)

eurostat

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 2019, it shipped almost 1.6 million tonnes (3.4% up on 2018) for a value of around €866 million. The EU was by far the larger exporter of seed potatoes, accounting with more than 80% of the trade.



National Associations



Companies



Associated Members





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