



## ACTIVITY REPORT 2022-2023

European Potato Trade Association

This Activity Report provides an overview of Europatat's work since the previous General Assembly in 2022. For the first time after the covid-19 break, the GA took physically place in Dublin (Ireland) on 30 May in the frame of the World Potato Congress.

We warmly thank Europatat's Board for its leadership through these challenging times and all associations and company members for their active support throughout the past year. Europatat's work would not have been possible without you!

### **THE ASSOCIATION**

President's Foreword	5
Vision & Mission	6 6
Structure	7
Membership and benefits	9
	and the second

### **KEY FIELDS OF ACTION**

Policy dossiers	
Agriculture	11
Promotion	13
Food Safety	17
Plant Health	18
Trade	21
Sustainability	26
Research & Innovation	32
Public Affairs and Networking	36

Communication

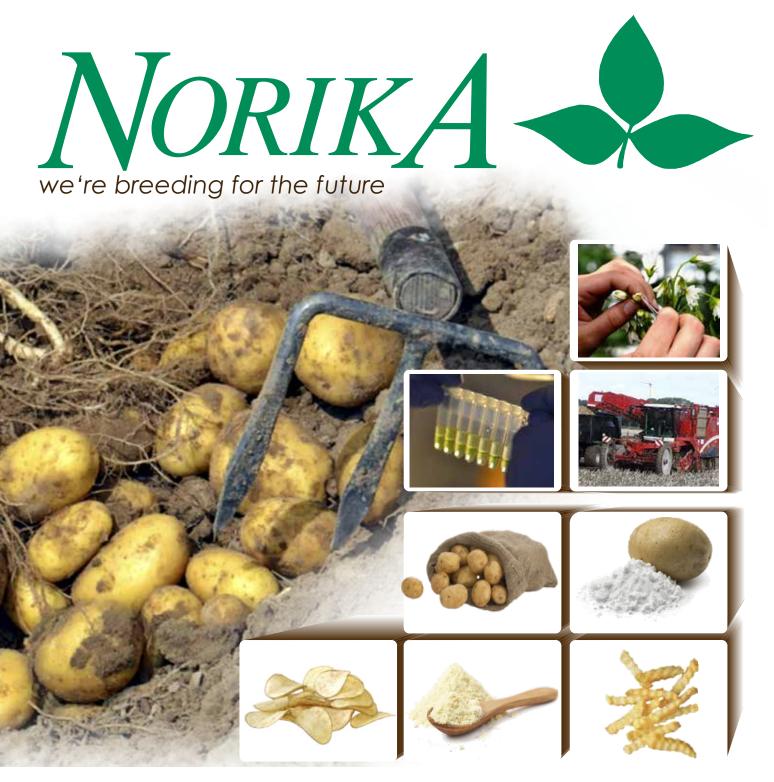
RUCIP

### POTATO SECTOR DATA

42

39

41



### modern varieties are key for sustainable growing

better nutrient efficiency - less need of Nitrogen

better virus resistance - less need of insecticides

better use of resources - less costs, less CO2



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## PRESIDENT'S FOREWORD



Dear Members,

I am honored to write this message after my first year as President of Europatat, and I am proud to welcome you to our great association. Europatat has never been more relevant and active than it is today.

This Activity Report is looking back to a very demanding season 2022-2023. In the forecast given during our presentation "The European Perspective" at the World Potato Congress in Dublin in 2022 we expected challenging times for our sector.

Our assessment of the current situation and expectations for future developments turned out to be very correct. On one hand, the constant decline of the fresh table potato segment in comparison to a further growth of the processing industry is more evident than ever. On the other, the influence of societal demands translated in changing regulation in the framework of the EU Green Deal and other external factors such as the political and economic crisis caused by the war in the Ukraine, leading to the radical increase of costs for energy resources, fertilizer and plant protection chemicals. All of that without dismissing the changing climate conditions resulting in weather extremes happening more often than in previous times.

The French fry industry was and is the pacemaker of the European potato market. Producers struggle with productions costs and look for new price balances to get a correct reimbursement for their efforts. Regulation to come seems to make our professional life not any easier. Supply chains and business contacts are getting more complicated and sometimes, especially with respect to third country exports, even disrupted. As traders we are the link between the different members of the supply chain and thus have a special responsibility for communication downwards and upwards the supply chain.

In the current market environment, it proved to be a very good decision to adopt a new proactive Europatat Strategy from a follower to a leader concept. The alignment of our internal structures, especially the establishment of the new "Sustainability Commission" was a very right step as well.

The number of topics covered in the several online meetings of our different commissions in the past year was impressive. I trust that I can say on behalf of our members "thank you" to all of our commission chairs and to all of those who have taken an active part in the daily work of Europatat.

Last but not least, I would like to send a message of appreciation and gratitude to Berta and Romans, our team in Brussels. Everybody could have seen their professional development and how very well our work is organised by them. Last season showed once again how very well Europatat is interlinked not only to the European institutions and decision makers, but also to other European associations. I believe you will agree on the fact that the complex challenges ahead of us will demand a closer cooperation with all the partners from the potato supply chain.

I wish all of us an interesting 2023 Europatat Congress, providing the platform for a professional analysis of the last season and fresh ideas to secure successful business in the future.

Tigran Richter, President of Europatat

### THE ASSOCIATION

#### More than 70 years representing European potato traders



In 2022 Europatat celebrated its 70th Anniversary. The "European Union for the Wholesale Trade in Potatoes" was established on 12 January 1952 in Paris, including members from Belgium, Denmark, France, Germany, Italy, the Netherlands and Switzerland. Seventy years later, Europatat has become a well recognised international non-profit association that counts 64 members in 20 countries in the EU and beyond and is more active than ever.

Currently, the association comprises both national organisations and individual companies involved in the trade of seed, ware and early potatoes throughout Europe. Europatat's members include a wide range of traders (including breeders, distributors, storers, packers, importers and exporters) delivering seed potatoes to farmers, as well as raw material to the food industry, packed potatoes to the retailers and food service sector.

#### New Strategy 2022-2025

A new ambitious Strategy for the period 2022-2025 was approved by the General Assembly on 30 May 2022. This strategic plan describes a new vision and mission for Europatat, as well as the key fields of action and priorities for the next three years.

The new strategy will serve as the guideline for the association to serve the interests of the sector in the short-to-medium term and to achieve progress in all of its major 14 objectives, which are distributed into 4 pillars (Secretariat and membership development; lobbying and intelligence gathering; information and communication; and RUCIP).



### **Our Mission**

To connect, represent and coordinate a common voice for all actors in the European seed and ware potato trade chain towards European and international decision makers and other stakeholders.

#### **Our Vision**

Europatat wants to be recognised as a proactive representative body that actively engages with its network.

#### Structure

#### Board and Advisory Committee

Europatat is structured around a General Assembly, a Board and commissions. This organisation enables, in spite of occasional conflicting opinions and interests, to define with an open mind a common position defending the profession. In 2022, the General Assembly elected a new President and re-elected its Treasurer for a two-years term. Considering the new ambitious strategy, a reorganisation of the Europatat commissions was also approved. This new organisation aims to facilitate the work of the Secretariat and to encourage the exchange of information and views within the membership.

Tigran Richter	Domenico Citterio	Heero Gramsma	Board
President	Vice-President	Treasurer	
Peter Ton	Thomas Herkenrath		Advisory Committee
Chair Seed Potatoes	Chair Consumption Potat	oes	
Vlastimil Rasocha	Johan van der Stee	Florimond Despr	ez
Chair RUCIP	Chair Sustainability	Chair Technical &	Regulatory

#### The Secretariat

The daily work of Europatat is conducted by the Secretariat of the Association, who is based in Brussels and is competent in various European languages.

Europatat's team, which is composed by Berta Redondo Benito, Secretary General, and Romans Vorss, Technical Affairs Director, is leading a proactive work of the Secretariat on several important topics for potato trade, always with the support of all the members and stakeholders across the potato value chain.



# Agrico Polska

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### **MEMBERSHIP & BENEFITS**

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

In total, the Association currently has 62 members that represent 20 countries in the EU and beyond. More precisely, Europatat's membership is composed of **16 national associations**, **40 companies and 6 associated members**. The complete list of members can be found at the end of this report.

The membership of Europatat is balanced between the different types of members and their focus. This guarantees a good balance of interests and a wide diversity of expertise is 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 including:

- 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.





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- Digitalized crop sourcing process



## **POLICY DOSSIERS**

# **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.

#### New CAP 2023-2027

To consolidate the role of European agriculture for the future, the EU's Common Agriculture Policy (CAP) has evolved over the years to meet changing economic circumstances and political and social requirements and needs.

The new CAP 2023-27 entered into force on 1 January 2023. Support for farmers and rural stakeholders across the 27 EU countries is based on the CAP 2023-27 legal framework and the choices detailed in the National Strategic Plans, approved by the Commission along 2022. The approved Plans were designed to make a significant contribution to the ambitions of the European Green Deal, Farm to Fork Strategy and Biodiversity Strategy.

In the past two years, Europatat monitored the development of the discussions around the new CAP and informed its members accordingly through its Circular newsletter.







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# **Promotion and consumption**

#### New EU agri-food promotion policy still on hold

The legislative proposal reviewing the EU Agricultural Promotion policy, which was initially expected to be published by the end of 2021, is still on hold. In 2022, the publication of the new legislation to amend Regulation (EU) 1144/2014 was postponed repeatedly without any indication of a new foreseen timing. The preparatory steps are finished (including a full impact assessment), but according to our sources in Brussels, the proposal is blocked due to the lack of internal agreement in the European Commission. As a reminder, the Commission announced that the policy's revision would be in line with the Commission's ambition to shift to a more plant-based diet with more consumption of fruit and vegetables and less red meat, as stated in the Farm to Fork Strategy and Europe's Beating Cancer Plan.

In the past two years, Europatat has been very active on this dossier, both replying individually to public consultations on the topic and as a part of a coalition of other 10 EU agri-food associations. This group supports that any specific sector or products should not be excluded from the EU Promotion Policy and that organic should not be presented as the only agricultural practice with the capacity to contribute to sustainability.

#### Preparing the 2024 Annual Work Programme

EU's Agricultural Promotion policy sets out how EU funding can be used for information and promotion initiatives for European agricultural products inside and outside the EU. The annual work programmes establishes the main priorities and budget lines for each year. For Europatat, the EU Promotion policy should keep focusing on increasing the awareness and recognition of the merits of all European agri-food products and of the high and sustainable standards applicable to agricultural production methods in the EU.



During the period covered by this Activity Report, Europatat sent as every year its comments to the European Commission ahead to the adoption of the 2024 AWP.

Europatat called on the Commission to re-establish a strong budget for programmes highlighting the specific features of agricultural methods in the Union and the characteristics of EU agri-food products ("generic" promotion), and to restore the budget balance between organic, sustainability and generic topics to achieve an equal and proportionate support for all sectors and sustainable agricultural practices.

Finally, Europatat also asked to maintain 2023's budget (185,9 M EUR) as a minimum basis for a successful and fair EU promotion policy.

#### Europatat keeps promoting potatoes amongst young consumers

With the aim of slowing down a long-term decrease in the potato consumption among Europeans between 18 and 34 years old (the so-called millennials), Europatat, together with the French, Irish and Flemish promotion bodies Bord Bia, CNIPT and VLAM, ran the promotion campaign "**Potatoes, prepare to be surprised – Europe's favourite since 1536**" from April 2020 to December 2022.

Following the success of this initiative Bord Bia, Europatat and VLAM will continue with the programme activities for three more years. The joint campaign, which is co-financed by the European Commission under the EU Promotion policy, will run until December 2025 to encourage the consumption of fresh potatoes among millennials in Belgium, France and Ireland. To inspire millennials to easily integrate potatoes into their daily lifestyle, 60 new surprising potato recipes will be added to the 300 ones available on the website **www.preparetobesurprised.eu** and social media profiles for Belgium, France and Ireland.

Next to that, a number of activations around the theme "*potato surprises*" (e.g. mini-events, contests etc.) with influencers will take place in the three countries along the next 3 years.

Finally, a series of "*Did you know*?" animations showcasing cooking skills, potato storage and sustainability tips and facts will be developed in seven languages for reaching out a higher number of millennials in Europe.

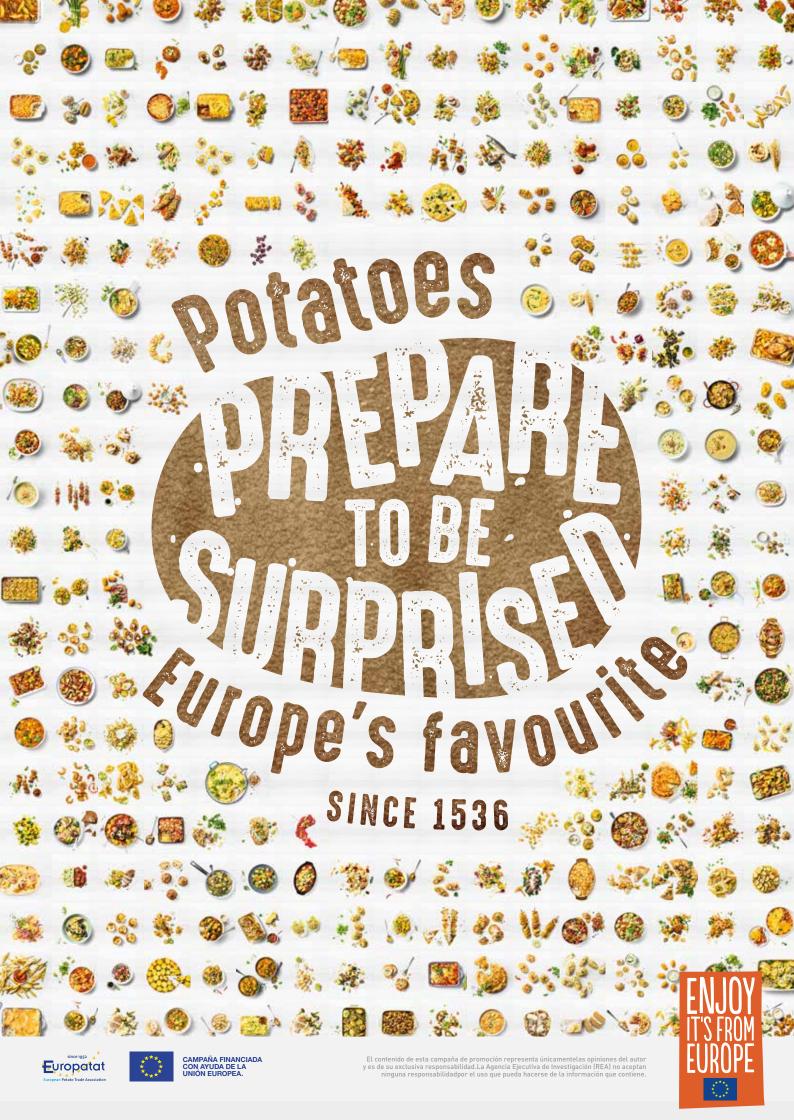
#### Are you prepared to be surprised? Follow us!



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# **Food Safety**

#### EU Farm to Fork Strategy: transition towards sustainable farming

The EU Farm to Fork Strategy is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally-friendly. Sustainable use of pesticides is one of the key policies towards "green transition"



In June 2022, the European Commission issued a proposal for a new Regulation on the Sustainable Use of Plant Protection Products (SUR). The proposal aims to reduce the environmental footprint of the EU's food system and help mitigate the economic losses that we are already suffering due to climate change and biodiversity loss. The proposed measures include:

- Legally binding targets at EU level to reduce by 50% the use and the risk of chemical pesticides as well as the use of the more hazardous pesticides by 2030.
- Environmentally friendly pest control: New measures will ensure that all farmers and other professional pesticide users practice Integrated Pest Management (IPM).
- A ban on all pesticides in sensitive areas: The use of all pesticides is prohibited in places such as urban green areas, including public parks or gardens, etc.

Europatat is closely following ongoing discussions regarding this dossier and regularly consults members. As a result of internal discussions, Europatat issued a position paper in November 2022 which was submitted to the European Commission and serves as a basis for all communication towards the EU institutions.

On 14 November, Europatat delegation came to Brussels to meet with the Czech Presidency of the Council, a Member of the European Parliament and other European stakeholders. In addition to this, Europatat has co-signed several position papers with other organisations to support the main agriindustry's messages.



## **Plant Health**

Since December 2019, the European Union has in place the EU-wide rules on protective measures against plant pests which are referred as "Plant Health Law". These rules aim to modernise the plant health regime, enhancing more effective measures for the protection of the European 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. EU Plant Health is one of the key policies followed by Europatat.

#### Wireworms: Industry's response

In the recent years, there has been an increase in the spread of certain pests. For example, the European potato industry has been severely impacted by the increased presence of wireworms. Some examples of damaging wireworms include *Agriotes lineatus*, *Agriotes obscurus*, *Agriotes sputator*, *Agriotes sordidus*, *Athous haemorrhoidalis*, *Limonius californicus* and *Ctenicera cuprea*.

The presence of wireworms across EU Member States has significantly increased over the last few years and it severely affects the quality of grown potatoes. The damaged potatoes can no longer be marketed or have to be used elsewhere which leads to significant financial loses for potato growers and increases food wastage. The increased presence of wireworms is affecting not only potatoes, but also other major crops.



Evidence suggests that the presence of wireworms has been getting worse and more extensive in the last few years. There are various factors that facilitate their spread. They notably include climate change, the switch to more cover crops and less bare soil, and a reduction in farm populations for predation. But the most important is the loss of certain plant protection products which are no longer authorised to be used in the EU.

To address this issue, in 2022 Europatat organised several discussions with members to determine the extend of the issue and to collect data. Also, Europatat wrote to the European Commission to inform them about the issue and asking to facilitate some research to find solutions.

On 5 May 2023, Europatat organised a technical discussion for members and invited experts from Austria, France and the UK who shared their knowledge and experience in controlling the spread of wireworms. Further discussions will be held at the Technical and Regulatory Commission during the Europatat Congress in Gdansk (Poland) in June 2023.



#### Revision of the Plant Reproductive Material (PRM) legislation

In 2021, the European Commission published a study on options to update the existing legislation on the production and marketing of plant reproductive material ('PRM study'). The study concluded that the current PRM legislation functions very well but that it is outdated. It has confirmed the continued relevance of certain key problems identified in the previous evaluation of the PRM legislation that was carried out in 2007 – 2008. The PRM study has also identified new challenges. In the past decade, there have been numerous new technical developments in the breeding and seed production sector, which can only be partially addressed or not addressed at all, with the tools of the existing PRM legislation. Also, the current PRM legislation needs to be aligned with the objectives of the European Green Deal.

Europatat follows closely all the developments regarding PRM legislation. The Secretariat organised several discussions with members on the upcoming revision of this legislation to identify priorities for seed potato traders. Europatat contributed towards several public consultations which were organised by the Commission. In 2023, Europatat organised a special discussion for members where invited Dutch experts from the NAK presented some of the potential policy changes to allow for more flexible certification of planting material in the Netherlands. Europatat will organise further discussions with members to ensure that future PRM legislation is fit for purpose.







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# Trade and Market access

The European Union has an ambitious agenda for a more sustainable food systems and trade policy. Europatat, as a European trade association, advocates for a trade environment based on fair rules, which take into account existing international standards for both import and export.



#### Europatat's role:

- · EU platform to exchange information and coordinate common actions
- Direct link with the EU **Commission & EU Delegations**
- Europatat Working Groups
- Link with export destinations



Europatat

#### Russia - Ukraine

Since March 2014, the EU has progressively imposed restrictive measures (sanctions) against Russia, initially in response to the illegal annexation of Crimea and Sevastopol and the deliberate destabilisation of Ukraine.

After 24 February 2022, in response to Russia's military aggression against Ukraine, the EU massively expanded the sanctions. It added a significant number of individuals and organisations to the sanctions list, and adopted unprecedented measures with the aim of weakening Russia's economic base, depriving it of critical technologies and markets, and significantly curtailing its ability to wage war. In total, the EU has adopted 10 packages of sanctions against Russia.

In parallel, the EU sanctions regime concerning Belarus has been expanded in response to the country's involvement in Russia's aggression against Ukraine. This is in addition to the sanctions aimed at Belarus that were already in place. This sanctions regime consists of a range of financial, economic and trade measures.

Russia and Belarus are part of the Eurasian Economic Union (EAEU). Membership of the EAEU includes Armenia, Kazakhstan, Kyrgyzstan, Russia and Belarus. This region is important for the trade is seed and ware potatoes. Europatat is closely following all the developments regarding the ongoing war in Ukraine and the imposed sanctions. Europatat also holds regular meetings of the Working Group to discuss the latest developments and for members to exchange information.



#### EU-UK trade

Since 1 January 2021, import of seed potatoes from Great Britain (GB) to the EU is no longer possible. Europatat members continue raising concern about the impact of Brexit on the EU potato industry.

Before Brexit, Scotland was an important supplier on the EU market of seed potatoes. Many EU growers chose to use GB seed potatoes for various reasons. For example, high grade Scottish seed potatoes, that are classified at basic grade, are often used for multiplication for input into the EU seed supply chain because of lower levels of disease and virus.



Europatat continues following the developments at the EU level regarding the import of seed potatoes. There were several discussions held at the EU level where the issue of seed potatoes was raised. For example, on 31 January 2023, the European Parliament's Agricultural Committee held an exchange of views with the Commission on "Barriers to EU-UK agri-food trade". Several Parliamentarians asked the Commission to find a solution to restore the bilateral trade in seed potatoes. The Commission responded that the UK is no longer aligned with the EU plant health rules and therefore, the import is no longer possible. Europatat also organises regular meetings of the Working Group where members share updates on the discussions at National Levels and how the current ban is affecting the European industry.

Moreover, Europatat welcomed the agreement reached between the EU and the UK on the Windsor Framework which will allow for the movement of seed potatoes from GB to Northern Ireland. Europatat will continue advocating for the return of the bilateral EU-GB trade in seed potatoes which will benefit greatly both sides.

#### Egypt

In 2021, Egyptian Government notified to the WTO a proposal for import mechanism for seed potatoes. Europatat expressed concerns regarding some of the provisions of the mechanism which would make difficult to export seed potatoes to Egypt. In March 2023, Dutch and French delegations went on a visit to Egypt for technical discussions regarding the import of seed potatoes. The visit included meetings with CAPQ, tours to several farms, a discussion with representatives from private sector on phytosanitary issues especially viral infection, etc. After the visit, it was confirmed that the application of the requirement on field inspections will not be implemented in 2023.



### Jordan

Many European exporters of seed potatoes have raised concerns regarding excessive controls and testing by the Jordanian Authorities on imported from the EU seed potatoes.

Europatat organised regular meetings of the Working Group to discuss the latest developments and for members to exchange information.

Europatat also kept informed the European Commission services who were also involved in the discussions with Jordanian Authorities.

### Burundi, Kenya, Rwanda, Tanzania and Uganda

In 2022, East African countries notified to the WTO a draft standard, which specified the certification requirements for pre-basic, basic and certified seed potato (Solanum tuberosum).

Europatat members raised several concerns regarding the draft Standard stating that many of the proposed provisions should be revised to provide more clarity. Europatat gathered the feedback from members and submitted an official response to the European Commission and directly to East African Countries.

#### Burundi, Kenya, Rwanda, Tanzania and Uganda

The new Draft East African Standard was notified to the WTO, which

- specifies the certification requirements for pre-basic, basic and certified seed potate (Solanum tuberasum).
- includes requirements for eligible varieties, application for certification, field requirements, field impection, storage inspection, sizing and grading, packaging and labelling.

This Standard is open for Comments by the WTO countries until 24 December.



Berlin 7|8|9 Feb 2024

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#### The IPPC ePhyto Solution

The ePhyto Solution of the International Plant Protection Convention (IPPC) continued to reach new milestones with three million certificates exchanged since its pilot in 2017. ePhyto certificates are digital formats of paper phytosanitary certificates attesting that plants and plant products do not carry pests and diseases that could impede trade or threaten economies and the environment.

This makes trade cheaper, faster and safer by eliminating fraud and bureaucracy often associated with producing and exchanging paper certificates.







Europatat is a member of the ePhyto Industry Advisory Group (IAG) and is thus directly involved in all discussions related to the advancement of this project.

In 2022, Europatat had the pleasure of participating to the first post-COVID meeting in person which was held in London. During this meeting, the IAG members discussed further advancement of this initiative and looked at several proposed funding options.

The Europatat Secretariat keeps its members updated on the latest developments regarding this initiative.



## **Sustainability**

The concern regarding sustainability along the food supply chain has been increasing in the political agenda in the past years.

Since the publication of the Communication on the European Green Deal in 2022, the European Commission has been unveiling the different initiatives and actions that will guide Europe to become the first climate-neutral continent by 2050.

To reply to new environmental, social and market demands and to achieve EU Green Deal's goals, Europatat created in 2022 a new Sustainability commission as a platform for internal discussion and exchange of information and best practices among potato traders.

The new commission rapidly received a great support from Europatat members and, shortly after its creation, a working group (WG) on potato sustainability indicators was set up. Since the start of 2023, the WG has been meeting virtually once a month to analyse how companies can measure their sustainability impact according to the United Nations' Sustainable Development Goals (SDGs). The first results of this task will be presented to and discussed with all Europatat members at the General Assembly taking place on 6 June in Gdansk (Poland).



#### Implementation of SUP Directive

Following the entering into force of the EU's Directive on Single-Use Plastics (June 2019), Member States had time until July 2021 to transpose it into national legislation. However, when this deadline arrived, most of the countries were unprepared as the guidelines on the scope of the Directive were only published in May 2021, and there was too much room for interpretation of this piece of legislation. In the past year, Member States published diverging packaging legislation that is undermining the integrity of the Single Market and increasing confusion among businesses. Some countries have introduced even more restricting bans, such as on fresh fruit and vegetable plastic and non-plastic packaging, as well as country specific labelling regulations. For instance, France and Belgium are only banning plastic packaging for fresh potato packs of less than 1,5 kg, whilst Spain is banning all types of packaging for the same products.

In 2022 and the first half of 2023, Europatat replied to the TRIS notifications of France, Spain and Belgium, and questioned the legitimacy of the prohibition of packaging for small fresh potatoes formats. Europatat defends the essential role of packaging all along the potato supply chain.

#### Proposal for new rules for fresh packaging in Europe

On 30 November 2022, the European Commission published a draft regulation revising the Packaging and Packaging Waste Directive (Directive 94/62/EC). The proposal is an integral part of the European Green Deal and the EU Circular Economy Action Plan, and applies to all packaging, regardless of the material used, placed on the EU market (including sales packaging, grouped packaging and transport packaging with the exception of road, rail, ship and air containers).

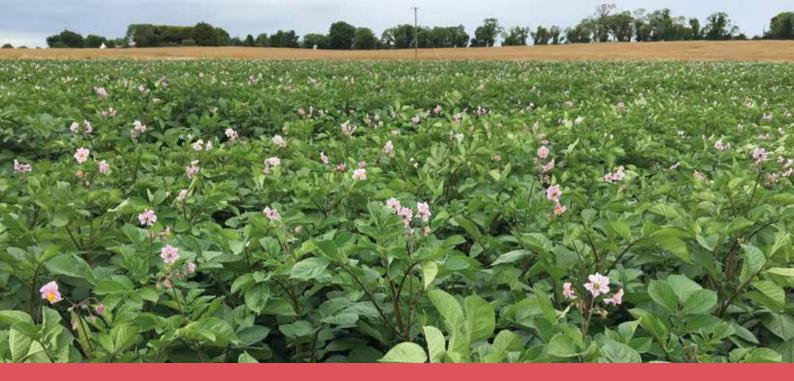
While the move from a Directive to a Regulation aims to increase the potential for harmonisation across Member States (and to avoid diverging national legislation jeopardising trade in the internal market), this also means that most requirements would apply directly to economic operators. The main aspects of the PPWR are related to:

- packaging minimization and waste prevention, including the restriction of placing in the market single use packaging for fresh fruit and vegetables formats of less than 1,5 kg;
- packaging recyclability, including targets for minimum recycled content in plastic packaging;
- re-use and refill, including reuse targets for a wide range of food and beverage packaging, as well as transport packaging;
- harmonised labelling, including the obligation to provide sorting instructions and information plastic recycled content and reusability.



Since the publication of the PPWR, and given the potential impact for potato traders in Europe, Europatat has not only been constantly informing members about any developments on the file, but also analysing in detail the proposal and its consequences for the sector. For instance, Europatat organised a webinar on packaging on 28 February 2023 to better understand this piece of legislation, discuss what will be its impact on members and agree on a common position and next steps.

After this webinar, Europatat prepared and sent a reply to the Commission welcoming the objective to increase harmonisation at EU level, defending the essential role of packaging all along the potato supply chain, and questioning the proposed ban of packaging for less than 1,5 kg fresh fruit and vegetables. This reply was shared with 20 Members of the European Parliament as well.



# The Irish Potato Federation is proud to support the Europatat Congress 2023.

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 Farm Group	www.meadefarm.ie	+353 46 9053198
O'Shea Farms	www.osheafarms.com	+353 51 437030
Keogh's Farm	www.keoghs.ie	+353 1 8433175
Sam Dennigan & Company	www.samdennigan.ie	+353 1 8010500
Seed Potato Co	www.seedpotatocompany.com	+353 1 8425055



#### Green claims: EU wants to fight greenwashing

On 22 March 2023, the European Commission published its proposal for a Directive on substantiation and communication of explicit environmental claims – the Green Claims Directive. The main objective of this EU initiative is to establish common criteria against greenwashing and to stop the proliferation of environmental claims, labels and logos by ensuring substantiation on the basis of products' environmental impacts. After the publication by the Commission, the proposal is now being discussed by co-legislators (EU Parliament and Council) following the ordinary legislative procedure.

Europatat is monitoring the developments on this process and informing members accordingly.



#### Private sustainability labelling - to be or not to be?

On 18 April 2023, the Agri-food chain Sustainability Roundtable, of which Europatat is a member, organised a webinar on sustainability labelling in retail that counted with the interventions of 3 European retailers (Eroski, Coop Trading and REWE) and more than 200 participants from all over the world. The webinar, moderated by Europatat's Secretary General Berta Redondo, was an excellent opportunity to share, discuss, and better understand how retailers are currently or planning to use sustainability labelling for agri-food products.

The Agri-food chain Sustainability Roundtable is an informal gathering of European agri-food chain industry associations, for the purpose of exchanging information, views, concerns, and positions, on preparatory legal acts and the implementation of legislation pertaining to sustainability.

Poll on Sustainability labelling in Retail	
2 aventione 1 %5 participated	
What is the top concern you have in relation to sustainability labelly products? (Engle Choice) +     Kells (2014) amazemi	ng for food / agri-food
Burten of labels or suppliers	(7/56) 79
Lack of formonisation of different labels.	(24/96) 251
Lack of transparency around labet methodology	(22/06)/2419
Greenwatering and consumer trust in labels	(integrine
insufficiently robust legislation around sustainability labeling	(1290:195
Burten of labels on primary producers (lamons)	(670) 47
Impact on products imported from fixed countries	10(6185

The participants in the roundtable represent a broad spectrum of the European agri-food sector, and the roundtable is a valuable forum to learn from one another's experience.



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### Liquid sprout inhibitor, easy to use!

### Start with sprout inhibition in the field and prepare your potatoes for storage

Inhibition of germination during storage

- Reducing volunteer potatoes in succeeding crop
- Inhibition of secondary growth, no glassy tubers
- More uniform tubers more regularity

### **Registered crops**

ITCAN SL 270 (BVL No. 027233-00 - ZEZWOLENIE No. R-14/2022wu - Romania No. 803PC/23.08.2022) is a soluble concentrate formulation containing 270 g/l maleic hydrazide. Use crop protection products safely. Always read the label and product information before use. ITCAN and ITCAN SL 270 are registered trademarks of Kreglinger Europe NV.



#### Tackling Food Waste in the potato sector

In the Farm to Fork Strategy, the Commission announced an initiative to set legally binding targets to reduce food waste. The legislative proposal, which will be part of the revision of Waste Framework Directive (WFD), is still expected for 2023. The Commission is now preparing the impact assessment report in support of this revision to set out the options and assess their impacts. As an active member of the EU Platform on Food Losses and Food Waste, Europatat informs its members about any development related to the WFD in particular, and about food waste prevention initiatives in general.

#### Europatat joins the project WASTELESS to measure and reduce food losses and waste in the EU

Launched on 18-19 January 2023 in Vila Real (Portugal), the EU Horizon Europe project WASTELESS aims to develop innovative tools and methodological recommendations for measuring and monitoring food loss and food waste along the food supply chain in the EU.

Among other activities, the project will develop a toolbox (an innovative set of decision-support tools for all those working along the food chain as well policymakers) developed in partnership with consumers and non-governmental organisations as well as HORECA representatives through hubs across the EU.

Europatat is part of the multidisciplinary consortium formed by 17 institutions from 14 EU countries and coordinated by UTAD (University of Trás-os-Montes e Alto Douro). Europatat's role in WASTELESS will be related with the dissemination of project's goals, results and other related information.





## **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.

#### ADAPT: Developing heat- and drought-stress tolerant potatoes

Europatat is part of the international consortium of the research project ADAPT ("Accelerated Development of multiple-stress tolerAnt PoTato"), in which the complementary expertise of ten leading academic research institutions, four potato breeders, a screening technology developer, a government agency and Europatat come together to investigate the mechanisms underlying multistress resilience in potato. The main objective of ADAPT is thus to identify new breeding targets and match potato varieties to specific challenging environmental growth conditions of the future.

This project, which was launched in July 2020, will run until summer 2024 with a total budget of 5 million Euro from the EU Horizon 2020 program (No GA 2020 862-858).



Europatat is an active partner in this project responsible for the communication activities to ensure that information about the project results reaches all the relevant partners. Europatat publishes and disseminates regular updates prepared by the partners on the progress made as part of the project.

There is also a potential to do further research building upon the results of the ADAPT project. For this reason, Europatat organised an internal consultation amongst project partners to gather all ideas on future research. As a result, Europatat prepared a policy paper that will be shared with the EU institutions to advise on further research.

Moreover, on 23-25 June 2023, the ADAPT consortium met in the premises of the Wageningen University (Netherlands) to share the latest project's updates and to discuss next steps.

Visit the official project's website (adapt.univie.ac.at) and Twitter account (@eu\_Adapt) for more information and updates!



#### PATAFEST: Fighting against emergency pests

Europatat has joined as consortium partner a new project called PataFEST which will be funded under Horizon Europe programme. This project will be managed by 18 partners around Europe, including the international cooperation with Ecuador.

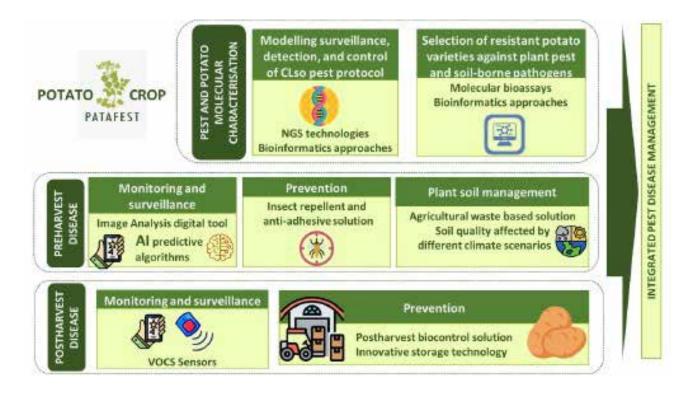
The goal of PataFEST is to reduce:

- the risk of introducing and spreading emerging potato pests that could endanger EU agriculture and
- the presence of soil-borne pathogens in the potato postharvest activities.

The selected threats in this project are:

- Candidatus Liberibacter solanacearum and its vectors affecting potato and causing Zebra Chip disease within the crop cycle (preharvest threat) and
- Soil-borne pathogens such as Fusarium sambucinum, Colletothricum coccodes, and Helminthosporium solani causing high incidence of rot and skin blemish on potato tubers during postharvest storage (postharvest threat).

Europatat's participation in this project will be of great benefit to its members. The climate change is having an increased impact on the way potatoes are grown and increases the risk of spreading emerging pests that will have a great impact on potato growing. Europatat will ensure that members are regularly updated on the progress made as part of the project. The official launch of the project is scheduled to take place during the kickoff meeting in Madrid, in June 2023.



# POTATO EUROPE BELGIUM 2023

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#### New Genomic Techniques (NGTs)

On 29 April 2021, the European Commission published a study regarding the status of New Genomic Techniques under Union law. The study examined the status of New Genomic Techniques (NGTs), taking into account the state of the art knowledge and the views of the EU countries and stakeholders.

The study concluded limitations to the capacity of the legislation to keep pace with scientific developments; these cause implementation challenges and legal uncertainties. Therefore, legal changes are necessary. The study has also confirmed that NGT products have the potential to contribute to sustainable agri-food systems in line with the objectives of the European Green for available translations of the preceding and Farm to Fork Strategy.

In October 2021, the EU Commission issued for a consultation a roadmap outlining a number of policy elements that will be considered in the development of policy options on how plants produced by certain new genomic techniques should be regulated in future.

In July 2022, the European Commission issued for a public consultation a questionnaire asking to comment on potential policy options to regulate New Breeding Techniques in future.

Europatat provided its response stressing that the EU should avoid delaying the adoption of the new rules on new breeding techniques as many countries around the world have already or are about to allow the use of such techniques. Europatat also stressed that there should be no mandatory provisions linking breeding with sustainability criteria in the future legislation. It should be up to the market and private standards to set breeding targets as is currently the case.



Study on the status of new #genomic techniques under Union law

It's a major step forward in providing clarity in a fast moving and very promising technological field.

See how our researchers contributed to the study europa.eu/!Nh64nH



Europatat also co-signed a common position paper with other 26 stakeholders supporting the forthcoming Commission proposal to enable regulatory framework for new breeding techniques.

The publication of the Commission proposal on new breeding techniques has been delayed until the end of June 2023.



## **PUBLIC AFFAIRS & NETWORKING**

### Connecting the sector

#### **Europatat annual Congress**

In 2022, the first physical Europatat Congress after the Covid-19 break took place on 29 and 30 May 2022 in Dublin, Ireland, within the framework of the World Potato Congress (WPC). The two events re-connected colleagues and friends from the European and global potato community in the context of Europatat's 70th Anniversary.



In 2023, the Europatat Congress is taking place for the first time ever in Poland, more concretely in the beautiful city of Gdansk. Under the title *"The Changing Geopolitical Landscape and the Future for Potato Trade"*, the annual Europatat gathering Congress will focus on the impact of current geopolitics for international agri-food trade and on the effect of EU's Green Deal's goals and new consumption trends for the potato sector inside and outside Europe.



All the information about next and previous editions of the Europatat Congress can be found at www.europatatcongress.eu

#### **Europatat Commissions**

Europatat Commissions allow Europatat to be continuously updated on key issues for the potato trade sector 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.

To facilitate the participation of Europatat members to the meetings, and to reduce the carbon footprint of the associations' activities, the meetings of these Commissions are now organised in a virtual format. In the past year, more than ten virtual meetings and webinars were organised!



### 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 the renewed Civil Dialogue Groups on International Aspects of Agriculture, Organic Farming and Quality and Promotion.

Europatat is also represented in the work of DG SANTE, particularly in the Advisory Group on Sustainability of Food Systems, in the EU Platform on Food Losses and Waste, and in 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

Europatat cooperates with other EU trade associations in order to maximise synergies and raise awareness on common concerns. In this light, the association 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 Fresh produce Association (Freshfel), the European Fruit and Vegetable Processors Association (PROFEL) as well as other major roof organisations in the food supply chain (COPA-COGECA, FoodDrinkEurope, EUROCOMMERCE).

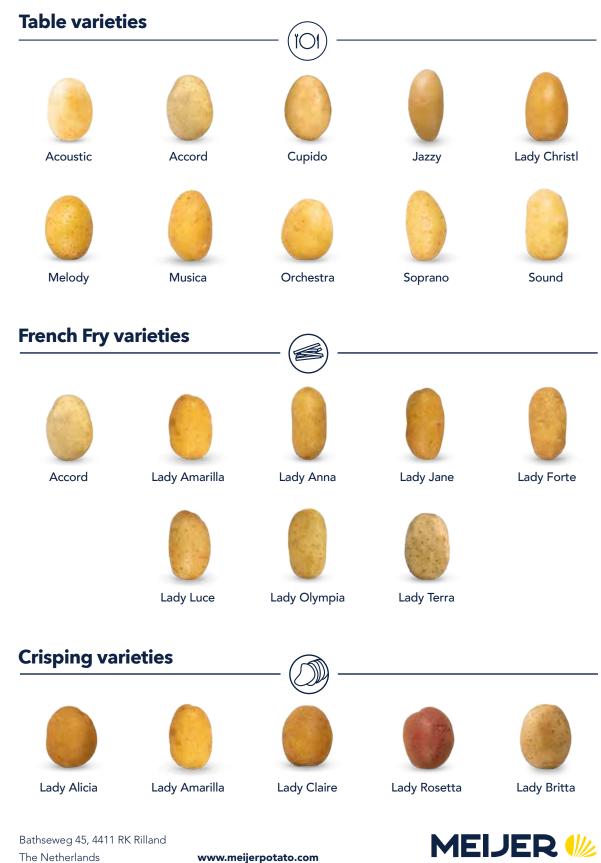
### Meetings with potato traders

After the Covid-19 break, Europatat's team resumed its participation at different trade shows and potato events to present the work of the association and multiply contacts with members and stakeholders of the sector. With these objectives in mind, in 2022 and 2023 Europatat was present at Potato Poland, Potato Europe in Germany, Fruit Attraction in Spain, Potato Europe in Belgium, the Potato Variety Days in the Netherlands and Fruit Logistica in Berlin. Europatat also organised several physical and virtual bilateral meetings with members throughout the past year.





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POTATO



# 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

The main internal communication tools that Europatat currently uses are:

- Alerts emails.
- The Europatat Circular, which is disseminated twice per month, includes the latest information on crucial legislation and important developments within the potato trade. It also informs members on actions undertaken by the Association.
- Europatat press releases and position papers on a variety of topics to raise awareness for matters of interest to the potato sector.
- The Europatat Extranet, which is exclusive for members and contains documents such as position papers, presentations and minutes from meetings or newsletters. The Extranet also contains an exclusive digital directory of members, a forum and a browser notification system.

## Strenghthening Europatat's visibility

In order to increase the Association's visibility and highlight the latest activities of the Secretariat, the newsletter "Europatat Insights" is circulated within all Europatat contacts (internal & external) once every two months. Nowadays, the Europatat Insights reaches more than 500 subscribers!

The Secretariat is also continuously updating the official website www.europatat.eu and being active on Twitter, LinkedIn and its new Instagram profile 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.







# LET US HANDLE THE NEMATODES SO YOU CAN HANDLE EVERYTHING ELSE.

TELONE<sup>™</sup> II is the industry gold standard for effectively managing the major species of nematodes that negatively impact potato production, including: Ditylenchus destructor, Globodera rostochiensis, Trichodorus spp., Pratylenchus spp., Meloidogyne hapla. By applying TELONE<sup>™</sup> before planting, you create a zone of protection around delicate developing root systems, leading to healthier plants, higher yields, and improved ROI. For decades, TELONE<sup>™</sup> has helped potato growers all over the world fight nematode pressure.

### Remember, there's no coming back from a poor start!





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TELONE™ Trademark of the Dow Chemical Company ("Dow") or an affiliated company of Dow. TELONE™ is a federally Restricted Use Pesticide. Always read and follow label directions.



## 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 (produces, 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 2021.

#### Upcoming new RUCIP rules

To adapt the rules and practices of the inter-European trade in potatoes to the current practices in the sector, a thorough revision of the RUCIP rules has been done in the past couple of years. At the time of writing this report, the revision of the articles was about to be finalised. Before publishing the new rules, the text needs to be revised by the national RUCIP secretariats. The new rules are expected to be finalised and published before along 2023.

### Advantages

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

RUCIP EUROPEAN SECRETARIAT	EUROPEAN RUCIP COMMITTEE
Berta Redondo Benito	Cristina Pohlmann
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## World production and trade

In January 2023, FAO updated its data related to global potato statistics which is available via its FAOSTAT database. The latest data includes statistics for 2021 and it covers "total production" (metric tonnes) and "total area harvested" (hectares), and present the results for 140 potato producing countries.

### 2021 Top potato world producers

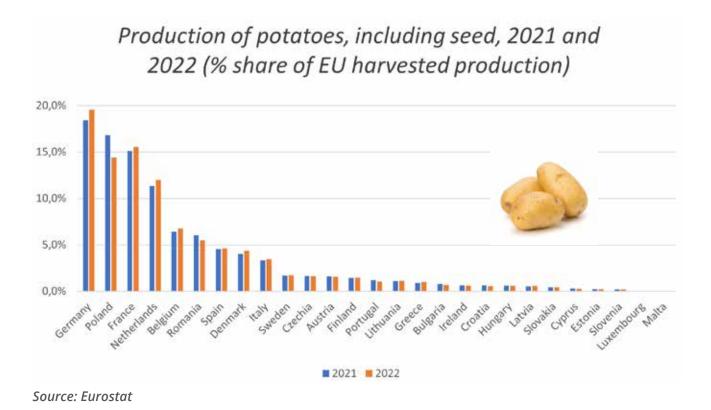
China	94,36 MT (+20,69% compared to 2020)
India	54,23 MT (+5,71% compared to 2020)
EU 27	50,44 MT (-6,51% compared to 2020)
Ukraine	21,36 MT (+2,49% compared to 2020)
USA	18,58 MT (-1,11% compared to 2020)
Russia	18,29 MT (-6,69% compared to 2020)



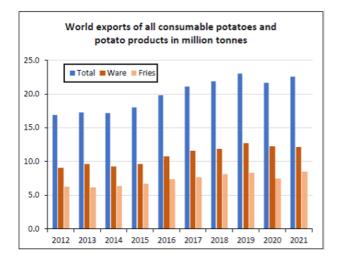


## **European production and trade**

Figures from Eurostat show that a large majority of the EU's harvested production of potatoes in 2021 and 2022 came from just five Member States; these were Germany, Poland, France, the Netherlands and Belgium.



Potato trade bounced back in volume terms in 2021 with the 24.2 million tonnes of products, ware and seed shipped, the second largest total on record after the all-time high figure in 2019. The volume exported was 3.4% more than in 2020.



This information was kindly provided by Cedric Porter from World Potato Markets.

WORLD POTATO MARKETS



























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## **National Associations**



## **Associated Members**







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