



I SIMPOSIO
INTERNACIONAL
DE
PATATA
MADRID





Berta Redondo

Directora General de Europatat
Director General of Europatat



Bienvenida y apertura

Welcome and opening

Cecilio Peregrín

Presidente de FEPEX



Alejandro Lorca

Subdirector General de Frutas, Hortalizas y Vitivinicultura. Ministerio de Agricultura, Pesca y Alimentación.



Inauguración oficial

Official opening



Joaquín Antonio Pino

Consejero de Agricultura, Ganadería,
Medio Rural y Política Ambiental de
Castilla y León



Challenges of potato production and trade at European level

Retos de la producción y comercio de patata a nivel europeo



Peter Ton

President of Europatat

Presidente de Europatat





The European potato trade association



About us

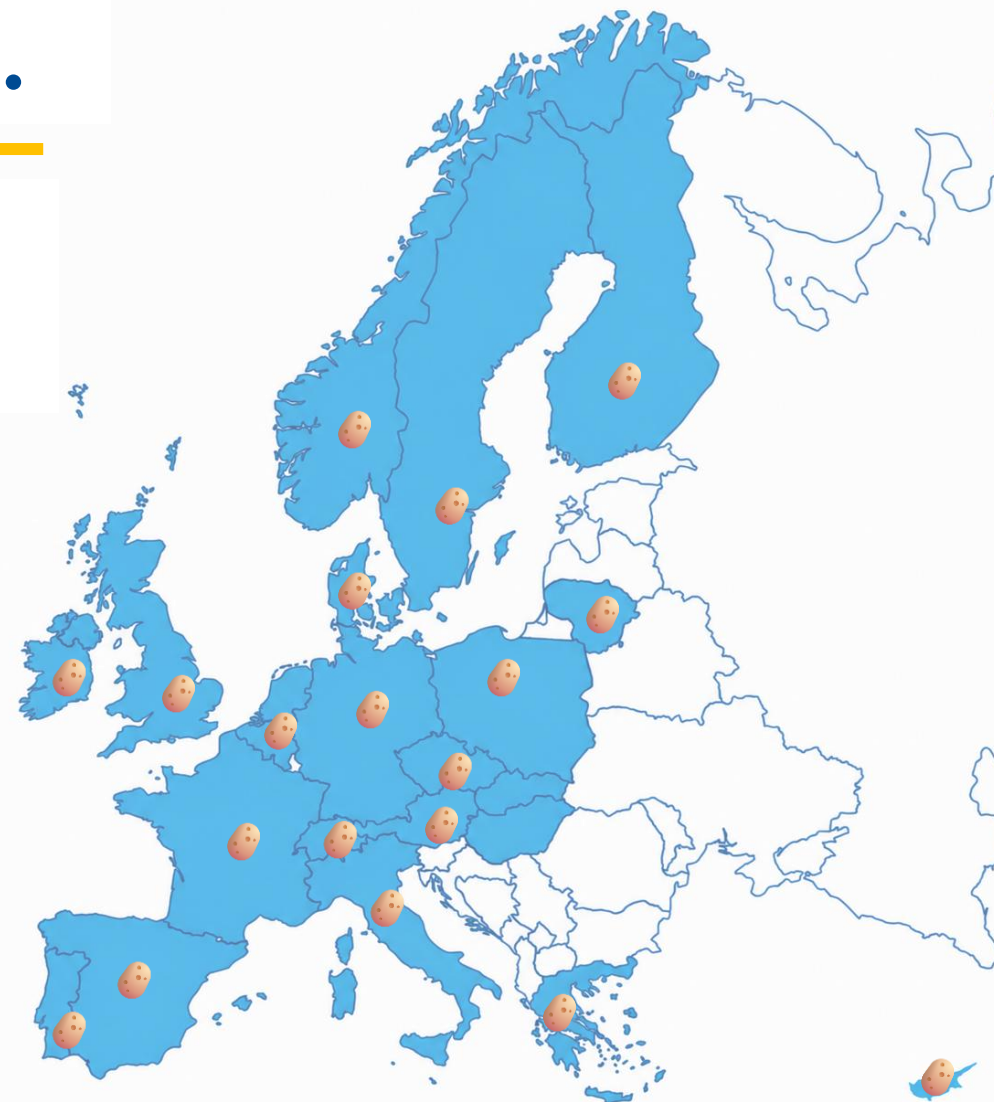


One European sector. One collective voice.

Europatat is the [European Potato Trade Association](#), bringing together national associations and companies involved in the trade of seed and ware potatoes from all over Europe.

73
members

21
countries



European potatoes: a major sector in a changing world



Potatoes are a **strategic crop** for food security, rural economies and a dynamic agri-food sector. A resilient and competitive potato sector is essential for Europe's food systems and rural areas.



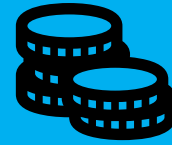
**1,47
million
hectares**

EU potato area in
2025



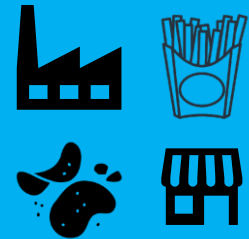
**56
million
tonnes**

EU total potato
production in 2025



**€18
billion**

Value of EU
produced potatoes
in 2024



**Many
uses**

EU potatoes reach
several markets and
different users
(farmers, industry,
retail...)

Producing potatoes in Europe is becoming more complex



Climate change, plant health challenges, water constraints, producing and transport costs are **increasing pressure** on production, quality and profitability.



Climate change

- More frequent heatwaves, droughts and extreme weather
- Impact on yields, quality and storability



Plant health

- Evolving and emerging potato pests
- Need for access to effective solutions and resilient varieties



Water access

- Higher water stress and more unpredictable rainfall patterns
- Need for efficient water management



Producing costs

- Geopolitical conflicts impact on energy and transport prices
- Access to qualified working force increasingly difficult

A European market needs rules that work across borders

A well-functioning **Single Market** is essential for a competitive potato sector. Europatat brings the sector's voice to European and International decision-makers.



A strong Single Market

- Ensure harmonised and consistent implementation of EU rules
- Avoid unnecessary barriers between Member States



Open & fair international trade

- Facilitate market access for European potatoes
- Defend science-based and proportionate phytosanitary rules



Workable regulatory frameworks

- Ensure clear and stable rules (e.g. NGTs, packaging sustainability)
- Monitor practical implementation across all EU countries



Reliable market information

- Collect market data from official sources of information
- Ensure transparency to support better decisions

We need to anticipate change, not simply react to it!

Changes in production patterns, evolving consumer expectations, new regulations and fluctuations in international markets are reshaping the potato market. This also creates **new opportunities**.



Innovation for the future

- Resilient varieties and new breeding tools
- Precision agriculture and digital solutions (including AI)
- Collaboration with researchers



Changing consumers

- New products and market segments to reply to growing demand for convenience and quality
- Defend image of potato as a healthy, versatile and sustainable high-quality product



Market intelligence

- Consistent and comparable data to analyse market and identify trends and common priorities
- Collaboration to share transparent information



Value chain cooperation

- Constructive discussion with all potato value chain partners to face market situation changes and new sectorial regulation
- Common position to defend the potato sector

Our challenges are shared. Our response must be too.

A competitive and sustainable potato sector in Europe requires **cooperation** across the entire value chain.

**The stronger our network,
the stronger our voice!**



Resilience



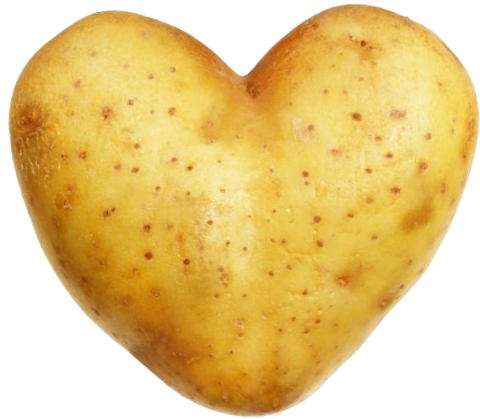
Competitiveness



Cooperation

since 1952

Europatat



**Be part of the
conversation!**

www.europatat.eu

The state of the European processed potato industry

Situación de la industria europea de patata procesada



Nuria Moreno

Secretary General of EUPPA

Secretaria General de EUPPA





European Potato Processors' Association

State of the European potato processing industry



Who we are

EUPPA is the association that represents the European potato processing industry.

6 
National associations

from Belgium, France, Germany, Italy, the Netherlands and the United Kingdom

14 
individual companies

> 90%
of Europe's processed potato production by both value and volume

 **25 000**

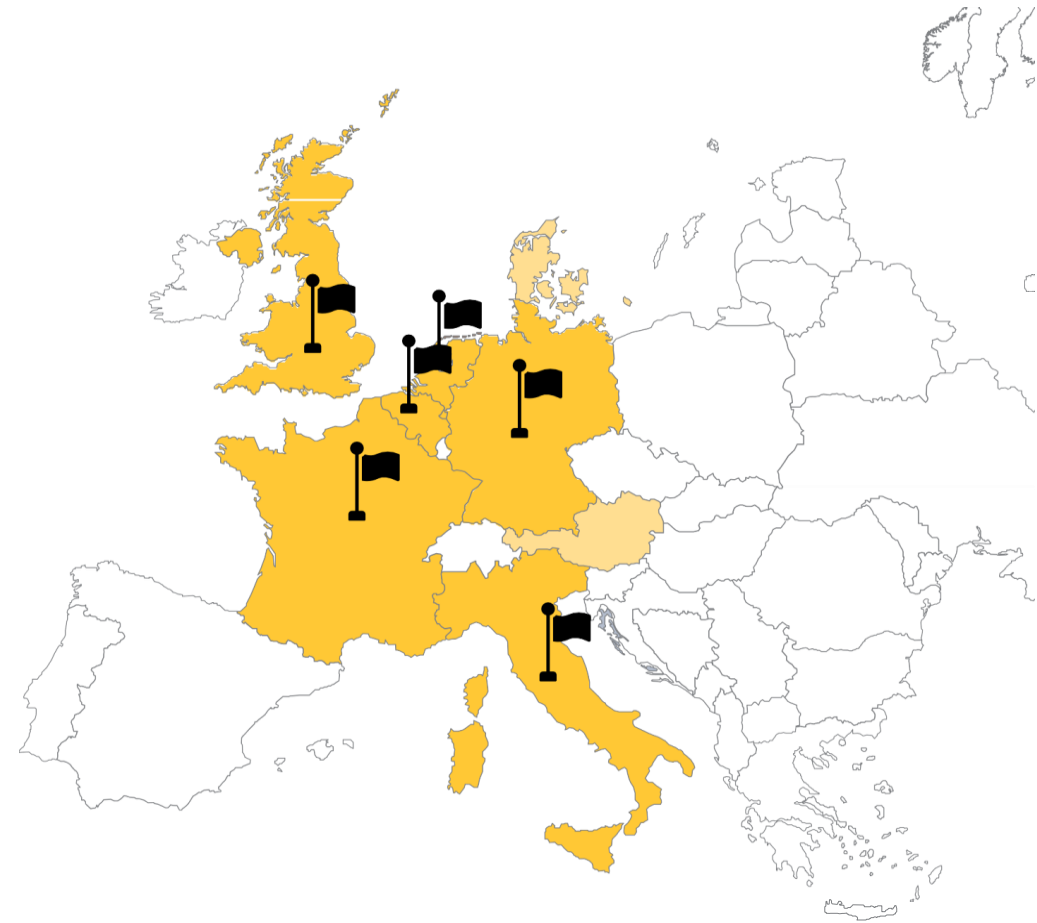
People directly and indirectly employed

 **50**

Production facilities

 **7.5**
million tonnes

Annual volume of production of French fries and potato-derived products



Europe as a potato hub

Europe is the second largest grower and processor of potatoes worldwide.
North-West Europe is the world's centre of potato processing, and it's a leading exporter.



7.3
kg/capita

Annual EU27 **consumption of French fries and potato-derived** products per capita.



€9.8
billion/year

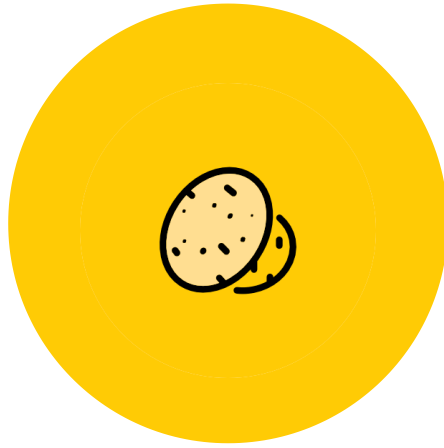
Processed European potato production generates an annual turnover of **9.8 billion euros**.



€8.9
billion

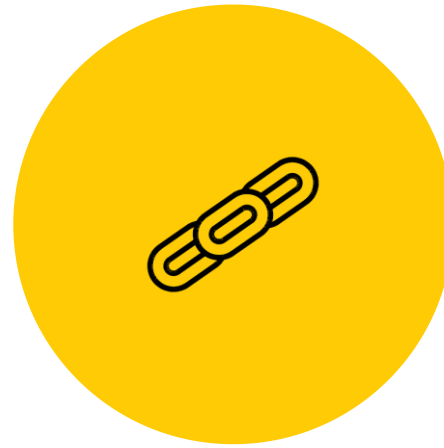
In 2024, the value of **EU27 exports of frozen potatoes** was **€8.9 billion** to nearly 200 countries worldwide.

The competitive position is shifting



Raw material under pressure

Climate-driven volatility in yields and quality, rising pest and disease pressure and tighter environmental rules make the supply of high-quality potatoes less predictable and more costly.



Cost and supply chain pressure

Energy, labour and raw material costs have all risen, on top of tariffs and compliance requirements. Processing is energy-intensive, leaving the sector more exposed to energy price shocks than the wider food industry.



Growing global competition

Export growth in Europe's main exporting countries has halted, while competition from non-EU markets continues to increase.

Securing the raw material base



Climate and water resilience

Weather extremes and water availability are now a structural risk to supply. Processors invest alongside growers in more resilient, sustainable potato production.



Plant health and crop protection

Rising pest and disease pressure meets a shrinking toolbox. Workable alternatives, innovation in crop protection and access to new breeding techniques are essential.

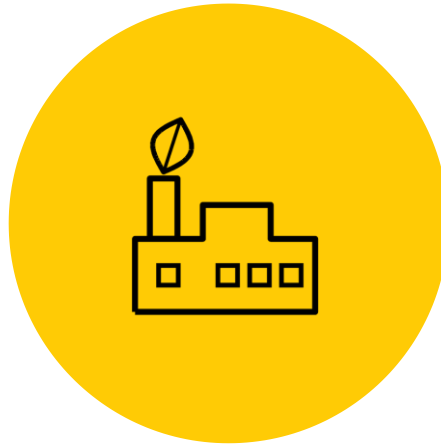


Fair and stable partnerships

Long-term contracts and fair earning models give growers the certainty to invest, and give Europe an attractive future for the next generation of potato farmers.



Sustainability as a shared commitment



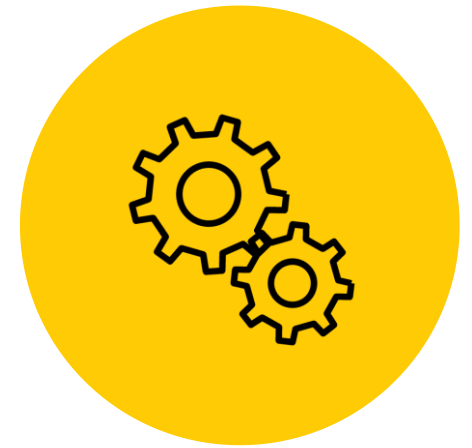
Energy and decarbonisation

Energy efficiency measures, heat and energy recovery and renewable supply cut emissions and costs at the same time, which is decisive in an energy-intensive sector.



Water, waste and packaging

Water reuse, waste management, biomass and the valorisation of side streams, alongside packaging that is reduced, re-used and recycled.



Efficient sourcing and operations

Continuous improvement in sourcing, processing and logistics raises efficiency, reduces losses and keeps sustainability economically viable.



Working across the value chain: the sector is moving beyond individual actions towards an integrated approach to how potatoes are grown, processed and managed across the chain. Shared commitment and coordinated action deliver both sustainability and competitiveness.

Priorities for a Europe where our businesses can thrive and create value

1 Support Global Competitiveness and Trade Opportunities: EUPPA members are committed to keeping Europe at the forefront of global food systems by producing safe, delicious, and affordable potato-based products. By investing in innovation and research, we aim to maintain our competitive edge and support thriving local food systems worldwide.

2 Secure the Supply of High-Quality Raw Materials: Partnering closely with potato-growing communities, we focus on sustainable farming practices, soil health, and fair revenue models to ensure a consistent supply of top-quality potatoes. Our efforts aim to support food security and improve rural livelihoods.

3 Facilitate the Green Transition: Sustainability is at the core of our industry. Through innovative practices, we aim to reduce our environmental footprint, promote resource efficiency, and achieve zero waste. We are dedicated to advancing sustainable manufacturing and packaging solutions to build a greener, more resilient food system.



SCAN HERE
TO FIND
OUT MORE

From Field to Plate

Rooted in Europe's soil, the potato processing sector encompasses a wide range of products used in numerous meals throughout different cuisines and cuisines during numerous of the day. From field to plate, we prioritise quality, innovation, and sustainability, nurturing a growing sector that provides food security and fair income to growers.

How much do you know about the European potato processing industry?

GM tonnes	7,8kg/metric tonne	2.9M tonnes	25,000 tonnes	€7.3B/year
Actual volume of production of french fries and potato-based products	Average annual volume of consumption of french fries and potato-based products	Volume of EU27 exports in 2022	Shredded fries for processing	Directly engaged growers in the sector

EUPPA priorities for a Europe where our businesses can thrive and create value

- 1 Support global competitiveness and trade opportunities**
As food manufacturing, we contribute to Europe's leading position in global food systems by providing safe, delicious, and delicious potato-based products that travel the internal and the global market. Europe is one of the world's most competitive and high-quality sourcing points for potato-based products. However, our industry is at risk of becoming less competitive in the global market due to cost increases in materials and energy. The industry aims to continue meeting and growing in Europe, but staying globally competitive is key to keep up with these ambitions.
For our sector to thrive, it is crucial for EU policy to maintain an ambitious trade agenda and to be able to count on a level playing field in the EU internal market as well as to be able to process potato products globally.
- 2 Secure the supply of high-quality raw materials**
As the most concentrated food crop globally, potatoes contribute to food security and food resilience around Europe. Our sector operates close to potato growing communities and partners with them to share knowledge, adopt climate change, improve soil health, and protect potato yields. This ensures the long-term supply of high-quality potatoes for processing. Income security is key to increasing farmers' livelihoods and when the potato value chain we focus efforts towards fair income models for growers.
To ensure agricultural resilience while respecting environmental impact, the EU member states should support the potato chain in its transition to more sustainable practices and innovative technologies. This is essential to address concerns around the risk of desertification and quality, as well as increasing costs. Moreover, access to water and to productive soils is key to the sector.
- 3 Facilitate the green transition in potato processing**
To continue this green transition, we need to ensure that the sector is safe, healthy and resilient. Through innovation, research, and sustainable manufacturing practices, the potato processing industry is meeting, innovating, and ensuring sustainable and zero-waste manufacturing. It is a goal to ensure that the industry is resilient to future challenges and to ensure that the industry is resilient to future challenges and to ensure that the industry is resilient to future challenges.
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SCAN HERE TO FIND OUT MORE

FutureFriendlyFries
The European Potato Processing Association (EUPPA)
www.euppa.eu

EUPPA



Follow EUPPA on LinkedIn!

Gracias por vuestra atención

EUPPA | European Potato Processors' Association

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Plant health situation in Europe and available solutions

Situación de la sanidad vegetal en Europa y soluciones disponibles



Romans Vorss

PataFEST/Europatat - Technical
Affairs Director





Current and emerging plant health threats

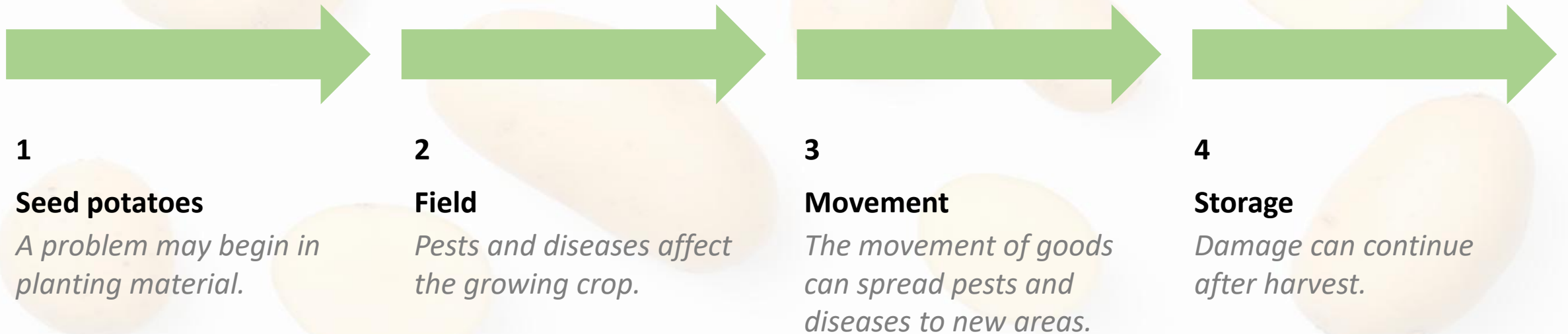


Romans Vorss,
PataFEST/Europatat
Technical Affairs Director



Plant health plays an important role at every stage

From field to storage



Several changes are happening at the same time

Climate change

Growing conditions and pest pressure can shift from season to season.



Moving pests

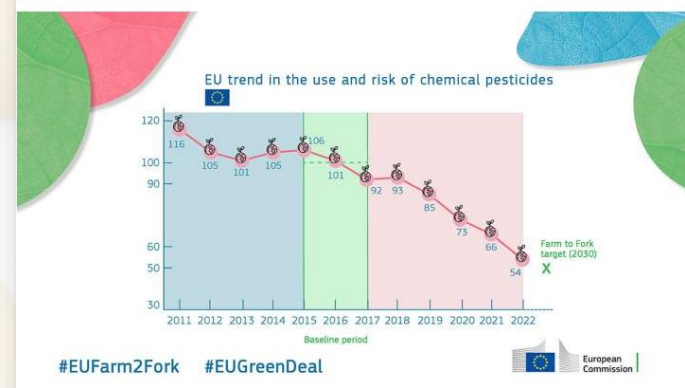
Pests continue spread across Europe and reach new areas



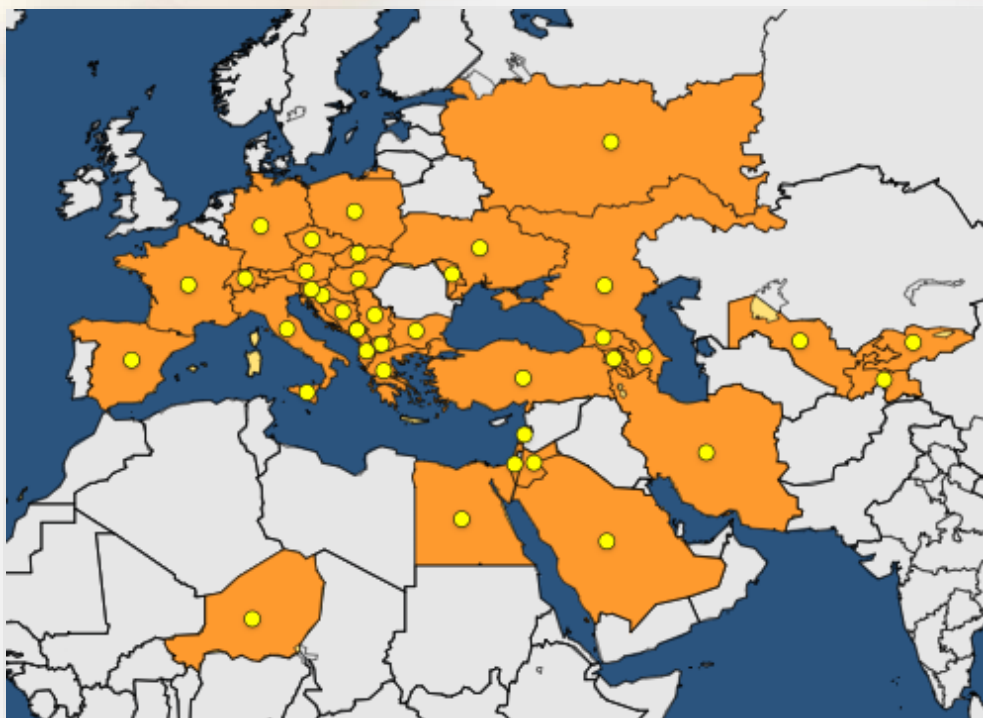
Fewer effective tools

Resistance and changes in available controls narrow the options.

EU trends in the use and risk of chemical pesticides



Stolbur: Important to recognise signs early



Source: EPPO

- Primarily caused by a phytoplasma, type of bacterium, *Candidatus Phytoplasma solani* (CPs).
- CPs is spread solely by insect vectors.
- Vector remains infectious for life and can repeatedly transmit the pathogen to healthy plants.
- Mild winters, fewer available insecticides and more plants that harbour the pathogen over winter are helping it spread.



Late blight demands constant attention

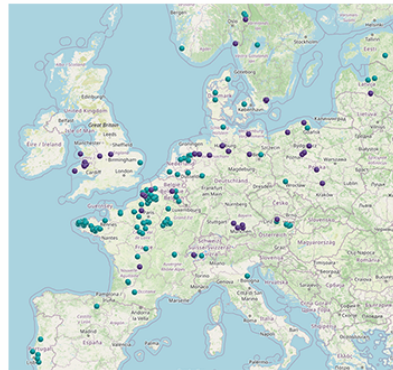
EuroBlight final data release, 2025

EuroBlight announce the final results of 2025 monitoring – despite the low blight pressure 2025 season over 1700 samples from 27 countries across Europe were genotyped.

17. juli 2026 af [Jens Grønbech Hansen](#)

July 2026, Jens Grønbech Hansen, Geert Kessel and David Cooke

As presented at the 21st EuroBlight workshop in Spain, here we formally release the population analysis on the late blight samples collected from the 2025 European potato crop. A general trend this year was that warm, dry weather across many potato growing regions, in particular from March to July, reduced primary inoculum levels and thus disease pressure across much of the season. For example, in the Netherlands, Germany and Belgium there were over 1000 samples collected in 2024 but only 256 in 2025. This bottleneck in the populations may skew findings in some areas in favour of samples from field trial sites or other sources such as volunteer potatoes. For example, in Britain



- Lower late blight pressure in 2025: Warm and dry conditions reduced disease pressure across much of Europe
- EU36 remained the dominant named genotype
- EU43 and EU46 are associated with resistance to some fungicide active ingredients
- Industry call for solutions issued in 2024

Source: EuroBlight

Wireworms: small pest, major quality losses



- Wireworms create holes in tubers, reducing quality and in some cases making potatoes unmarketable.
- They are difficult to control once the crop has been planted.
- Wireworms are widespread in some countries and an increasing concern in others.
- Control has become harder since the withdrawal of fipronil and ethoprophos.
- Reliable statistics on the extent of the problem are lacking.
- Raising awareness is essential.
- The European Wireworm Research Network coordinates research.

Emerging and future risks to plant health



TOPIC: Emerging and future risks to plant health
HORIZON-CL6-2022-FARM2FORK-02-02-two-stage

Overall project budget: € 6 097 603,75

Start date: 1 June 2023

End date: 31 May 2027

Total months: 48

PROJECT PARTNERS

9

COUNTRIES

18

PARTNERS

6 SMALL AND MEDIUM ENTERPRISES

2 LARGE COMPANIES

4 RESEARCH TECHNICAL ORGANIZATIONS

4 UNIVERSITIES

2 ASSOCIATIONS





Challenges in Potato Cultivation

PREHARVEST → Bacteria *Candidatus Liberibacter solanacearum* (CLso) and which disease is known as **zebra chip (ZC)**.
Vector psyllid *Bactericera cockerelli* (BC).

POSTHARVEST → *Fusarium sambucinum*, *Colletotrichum coccodes*,
Helminthosporium solani
Soil Born Pathogens



Project Objectives



**PEST AND POTATO
MOLECULAR
CHARACTERISATION**

**Modelling surveillance, detection,
and control of CLso pest protocol**

NGS technologies

Bioinformatics approaches



**Selection of resistant potato
varieties against plant pest and
soil-borne pathogens**

Molecular bioassays

Bioinformatics approaches



**PREHARVEST
DISEASE**

Monitoring and surveillance

Image Analysis digital tool

AI predictive algorithms



Prevention

Insect repellent
and anti-adhesive
solution



Plant soil management

Agricultural waste-based solution

Soil quality affected by different
climate scenarios



**POSTHARVEST
DISEASE**

Monitoring and surveillance

VOCS Sensors



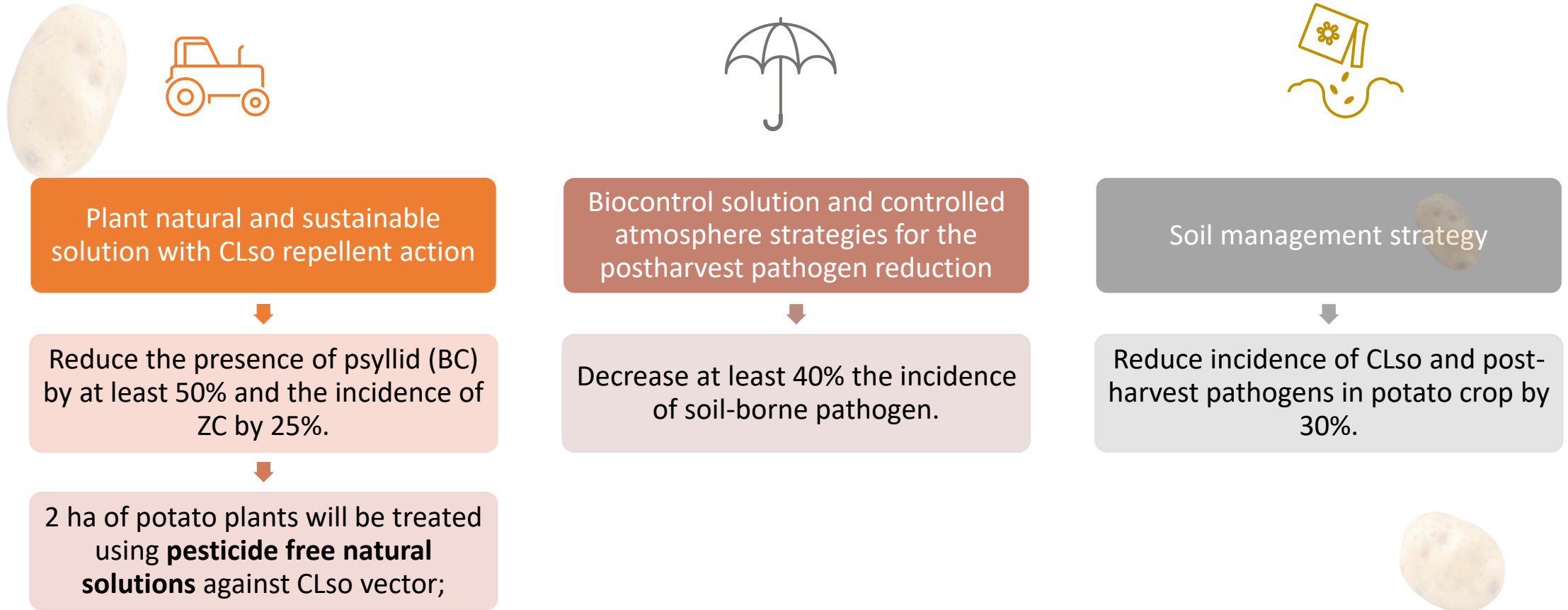
Prevention

Postharvest biocontrol solution

Innovative storage technology



Expected outcomes of the project



Expected outcomes of the project



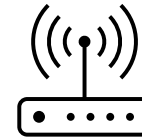
Technologies in plant bioassays against CLso pest disease



At least **20 potato varieties having resistant traits** against CLso will be evaluated in field trials;



Digital tool will be in field performing 90% reliability on the **diagnostic detection** of CLso disease in potato crops.



High-performance portable VOCs sensor for the real time early detection of ZC and potato pathogen disease



VOCs portable sensors will be validated on potato (100 Kg) under real postharvest warehouse storage

EU action: prepare before emerging pests arrive



Detect new pests before they spread.

Member States need reliable monitoring and testing, with quick information sharing so they can respond to early warning signs.



Have a clear plan for outbreaks.

Agree on who does what, test the plans regularly and ensure funding is available when action is needed.

Invest in solutions that work in practice.

Support research into resistant varieties, better diagnostics and sustainable pest management, and help growers put the results to use.

Give growers access to new control options.

Reduce unnecessary delays in authorising low-risk and biological plant protection products, with better cooperation between Member States.



Preventing pests from becoming established starts with early detection, clear responsibilities and a quick response.

National and sector actions



National authorities

should work with local networks to watch for new pests, train inspectors and advisers, and make it clear how suspected outbreaks should be reported and confirmed.



Researchers and the potato sector

should share what they see in the field and test new approaches under real growing conditions. Growers need the results in a form they can use.

Farmers and businesses

can check their crops regularly, report unusual symptoms, use certified planting material and follow good hygiene practices.



Everyone involved

should practise how they would respond, so they know their role and who to contact if a new pest is found.



Spotting a problem early helps only if people know what to look for, who to tell and what happens next.



POMATO aims to safeguard the health of potato and tomato crops and their final product quality by tackling Cs and Rs outbreaks.

Objectives:

1. Development of molecular approaches for the identification of Cs/Rs disease resistance genes in potato/tomato.
2. Development of early detection and surveillance tools using AI, polymeric sensors, and multispectral images from drones.
3. Design of natural and bio-control solutions against Cs/Rs.
4. Validation of IPM strategies (TRL5) through case studies in greenhouses and real infected fields in Latin America and the EU.
5. Dissemination and exploitation of results for wider uptake.



05/2025 - 04/2029

Duration: 48 months



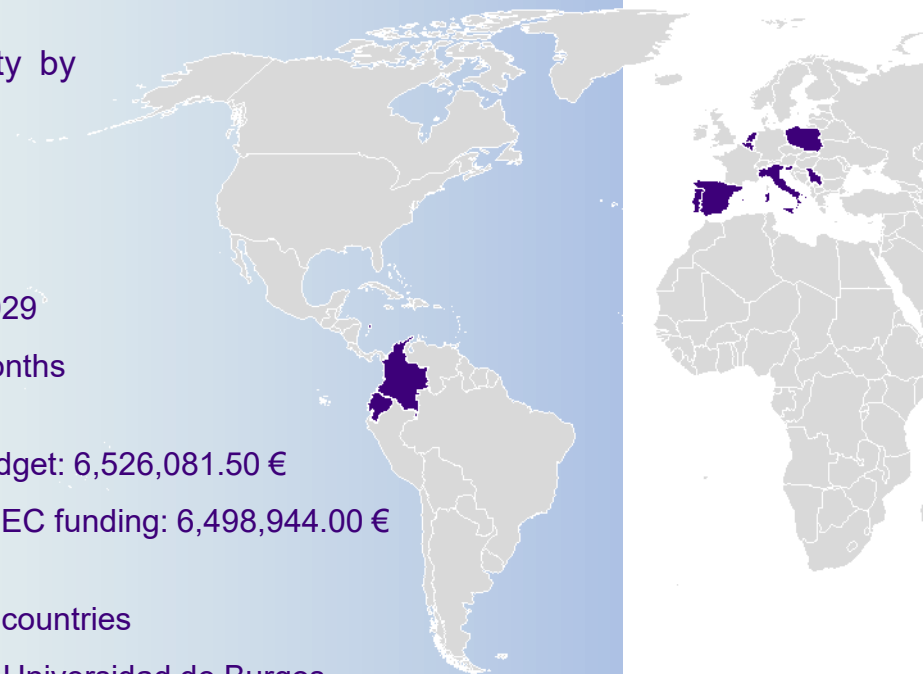
Total project budget: 6,526,081.50 €

Total maximum EC funding: 6,498,944.00 €



16 partners, 10 countries

Coordinated by Universidad de Burgos



Funded by
the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency (REA). Neither the European Union nor the granting authority can be held responsible for them.



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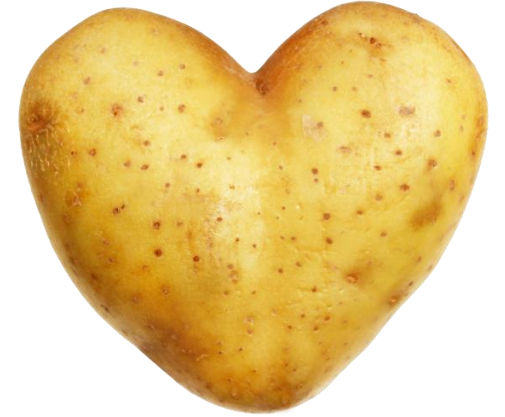


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Thank you!
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Plant health situation in Europe and available solutions

Situación de la sanidad vegetal en Europa y soluciones disponibles



Michal Kicinski

Senior Manager for Sustainable
Agriculture. Crop Life Europe



Plant Health in Europe and Available Solutions

INTERNATIONAL SYMPOSIUM OF POTATO



October 5, 2026

Michal Kicinski

CropLife Europe

Who we are

26

companies

32

national associations

26,000

people in the sector

We believe Europe's farmers must have access to a full toolbox of innovative crop protection solutions to choose their preferred production model and to maintain their production as they transition to a more resilient and sustainable farming system.

Farmers' Toolbox



CONVENTIONAL
PESTICIDES



BIOPESTICIDES



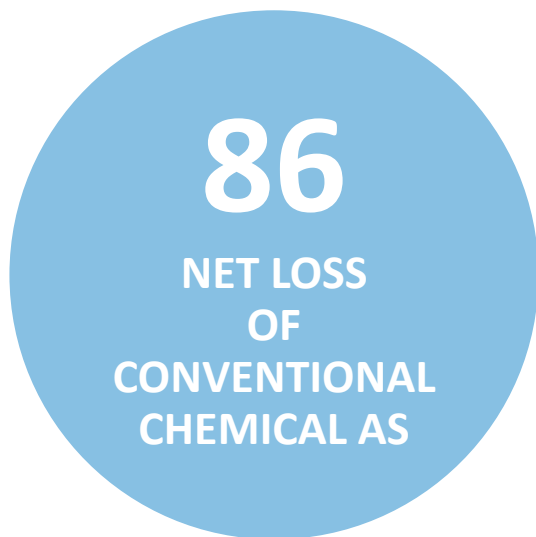
PLANT
BIOTECHNOLOGY



DIGITAL AND
PRECISION AGRICULTURE

The Diminishing Farmers' toolbox

The EU Farmers' Toolbox in the last 7 years



1 new chemical AS approved in the last 7 years

Was 8+ AS/yr (2008 - 2015)

87 chemical AS non-renewed, withdrawn or expired



20 new biological AS approved since 2019

26 biological AS non-renewed, withdrawn or expired



7 new basic substances approved in the last 7 years

This includes cow milk

- 20 new conventional AS applications remain pending, most over 5 years, some over 10 years after admissibility
- 53 new biological AS applications remain pending, most over 4 years, some over 10 years after admissibility

The EU Farmers' Toolbox in the last 7 years and Beyond

As of July 2026 the EU pesticides database and Open EFSA indicate that the following applications were pending:

- 53 Biological Active Substances
- 20 Chemical Active Substances
- 5 Basic Active Substances

44 of the substances mentioned above have been pending for more than four years, including 28 biological and 16 chemical active substances

There are currently around 200 active substances still in the regulatory pipeline

Omnibus X: An Opportunity for Regulatory Simplification

The EC has proposed to replace routine, time-limited renewals with unlimited approvals for most active substances

Substances could still be reassessed where new scientific evidence, monitoring data, or if safety concerns justify further review

Based on current figures, this could mean that 89% of current active substances, including basic substances could receive unlimited approvals

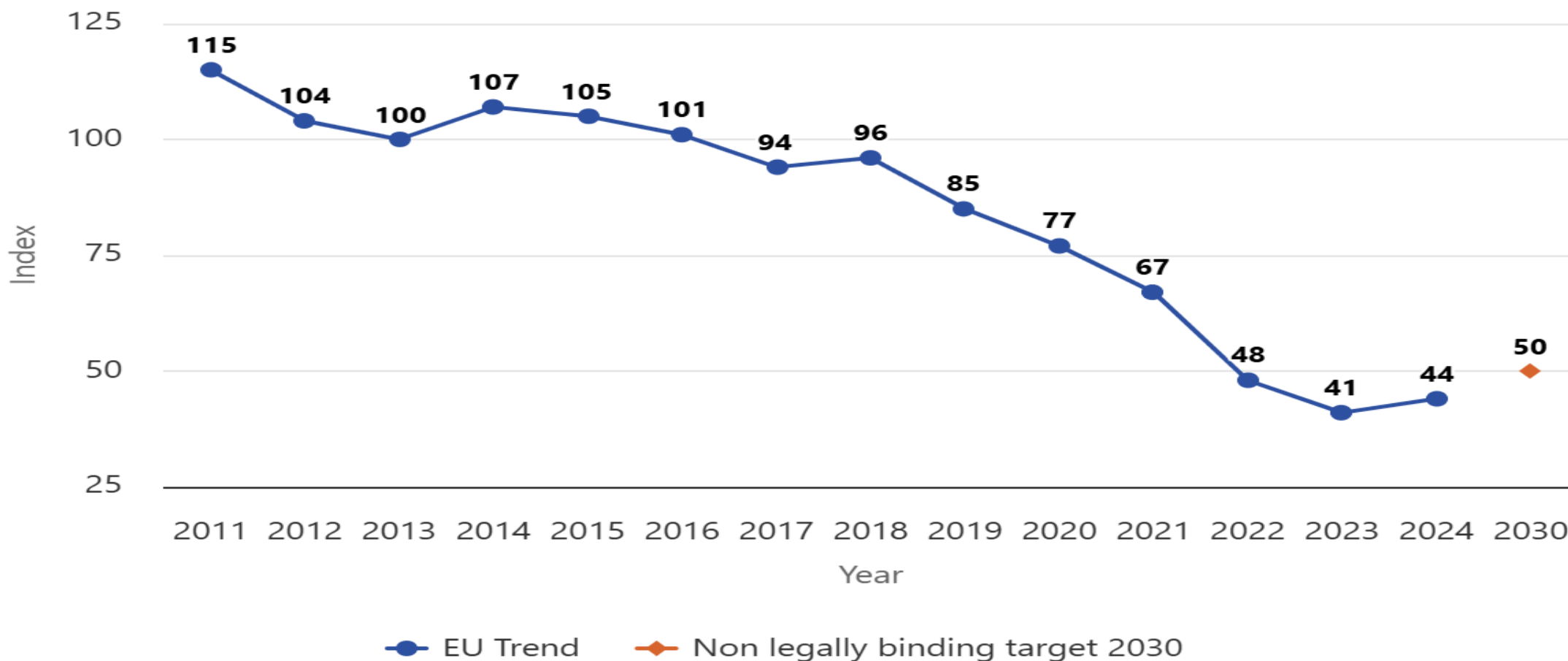
46 active substances listed as candidates for substitution as well as substances assigned a limited approval period due to uncertainties during the risk assessment process, would remain subject to time-limited approvals

Reduction of PPP use and risk in the EU



2024 EU Farm to Fork Trends in the Use and Risk of Chemical Pesticides

EU trend in the use and risk of chemical pesticides (2011-2024)



Conclusion

Conclusion

Fewer solutions mean farmers will face higher production costs and reduced resilience to new or emerging pest threats. This will also create an increased reliance on emergency authorizations

Basic substances do not help replenish the farmers' toolbox to compensate for the loss of 92 chemical and biological active substances over the last 7 years

European farmers have reduced the use and risk of chemical pesticides by 56% from 2018-2024 against a 2015-2017 baseline and have already surpassed the non-binding 2030 target of reducing the use and risk of chemical pesticides

Simplification of the current pesticide approval process could lead to farmers having access to more tools to protect their crops from pests and disease



FOR MORE INFORMATION

Michał Kiciński

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BlueN™: Advancing Potato Production Through Biological Innovation

BlueN™: Impulsando la producción de patata a través de la innovación biológica



Alberto Martín

Customer Technology Manager - Spain & Portugal. Corteva Agriscience



Análisis de la situación del sector de la patata español: retos y oportunidades

Analysis of the situation of the Spanish potato sector: challenges and opportunities

Moderador:



Alfonso Saénz de Cámara

Presidente Comité Sectorial de Patata de FEPEX

Chair of the Potato Sector Committee of FEPEX



Análisis de la situación del sector de la patata español: retos y oportunidades

Analysis of the situation of the Spanish potato sector: challenges and opportunities



Yolanda Medina
Presidenta de ASONAL



Eduardo Ramos
Representante del CIPP



Christian Cerezo
Agro Lead Southwest
PepsiCo



Closing remarks

Clausura



Berta Redondo

Directora General de Europatat

Director General of Europatat





I SIMPOSIO DE PATATA INTERNACIONAL

Patrocinadores:

Platinum:



Plata:



Colaboradores:



***Let's continue in the
cocktail!***





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INTERNACIONAL
DE
PATATA
MADRID

