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

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

Europatat

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…)

Source: WPM, Eurostat

Producing potatoes in Europe is becoming more complex

Europatat

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

Europatat

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!

Europatat

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

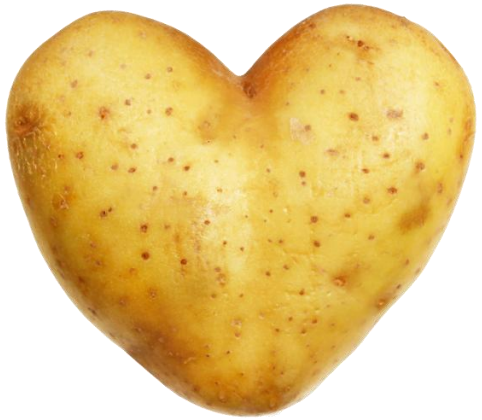
Competitiveness

Cooperation

Europatat

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

EUPPA
European Potato Processors' Association

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

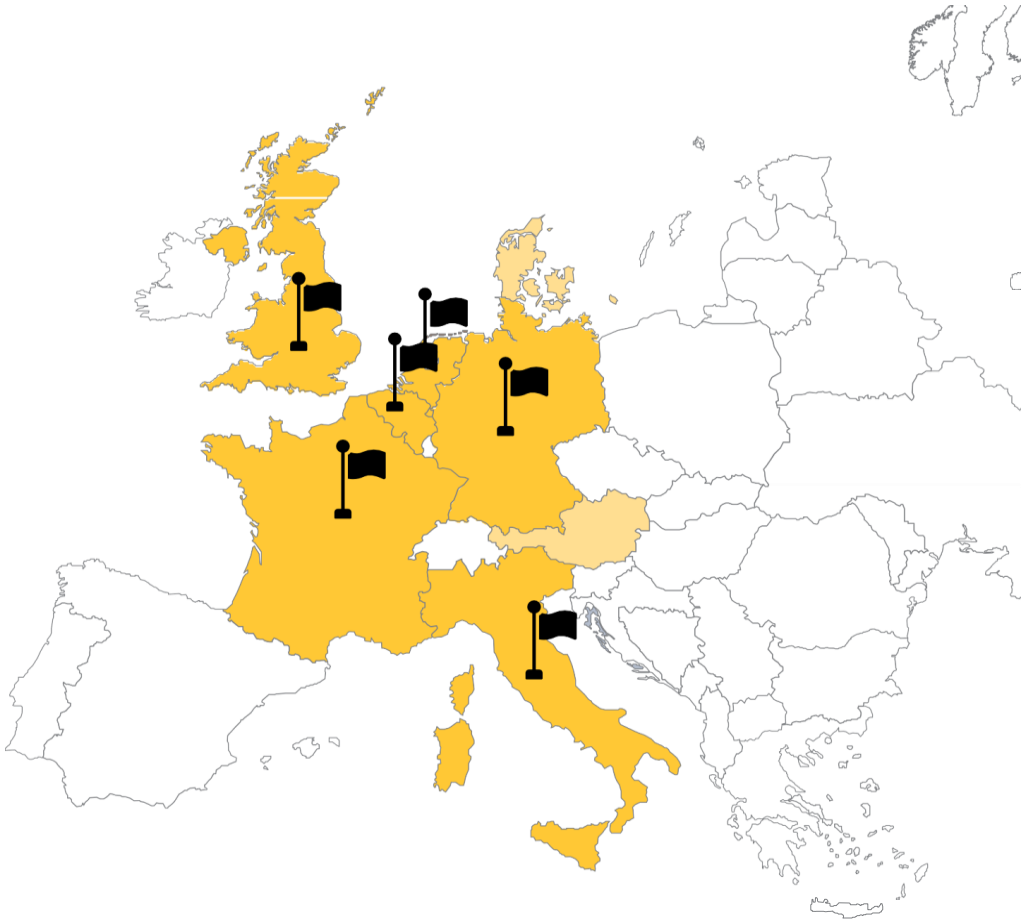
14
individual companies

> 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

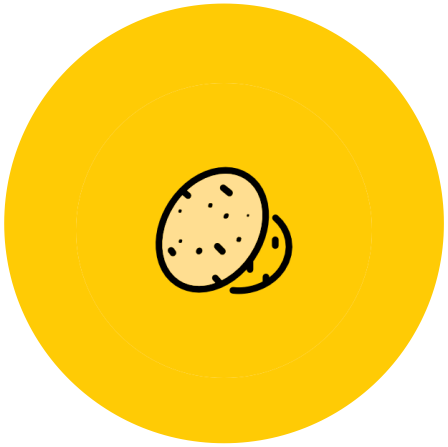
Processed European potato production generates an annual turnover of **9.8 billion euros**.

€8.9
billion

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

Sources: Eurostat, UN Comtrade and internal EUPPA figures.

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.

Sources incl: RaboResearch, 2026

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

Follow EUPPA on LinkedIn!

Gracias por vuestra atención

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EUPPA
European Potato Processors' Association

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

I INTERNATIONAL SYMPOSIUM OF POTATO MADRID

Romans Vorss,
PataFEST/Europatat
Technical Affairs Director

Plant health plays an important role at every stage

From field to storage

1

Seed potatoes

A problem may begin in planting material.

2

Field

Pests and diseases affect the growing crop.

3

Movement

The movement of goods can spread pests and diseases to new areas.

4

Storage

Damage can continue after harvest.

Several changes are happening at the same time

Climate change

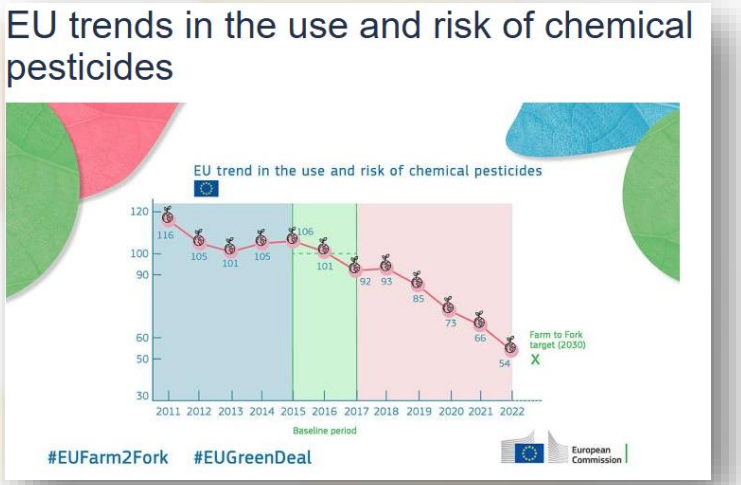
Growing conditions and pest pressure can shift from season to season.

Moving pests

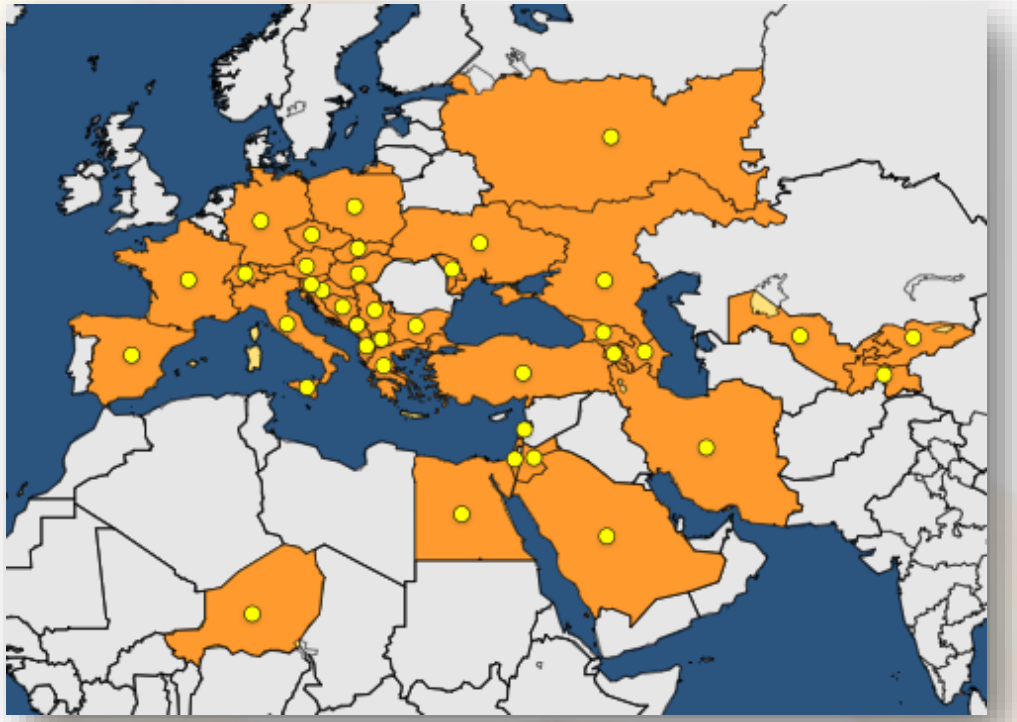
Pests continue spread across Europe and reach new areas

Fewer effective tools

Resistance and changes in available controls narrow the options.



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

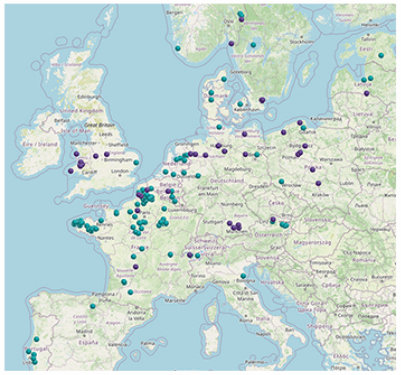
EuroBlight final data release, 2025

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



Source: EuroBlight

- 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

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

PATAFEST

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

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PATAFEST

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, Colletothricum coccodes, Helminthosporium solani
Soil Born Pathogens

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PATAFEST

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

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PATAFEST

Expected outcomes of the project

Plant natural and sustainable solution with CLso repellent action

Reduce the presence of psyllid (BC) by at least 50% and the incidence of ZC by 25%.

2 ha of potato plants will be treated using **pesticide free natural solutions** against CLso vector;

Biocontrol solution and controlled atmosphere strategies for the postharvest pathogen reduction

Decrease at least 40% the incidence of soil-borne pathogen.

Soil management strategy

Reduce incidence of CLso and post-harvest pathogens in potato crop by 30%.

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PATAFEST

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

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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.

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PATAFEST

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.

Farmers and businesses

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

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.

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.

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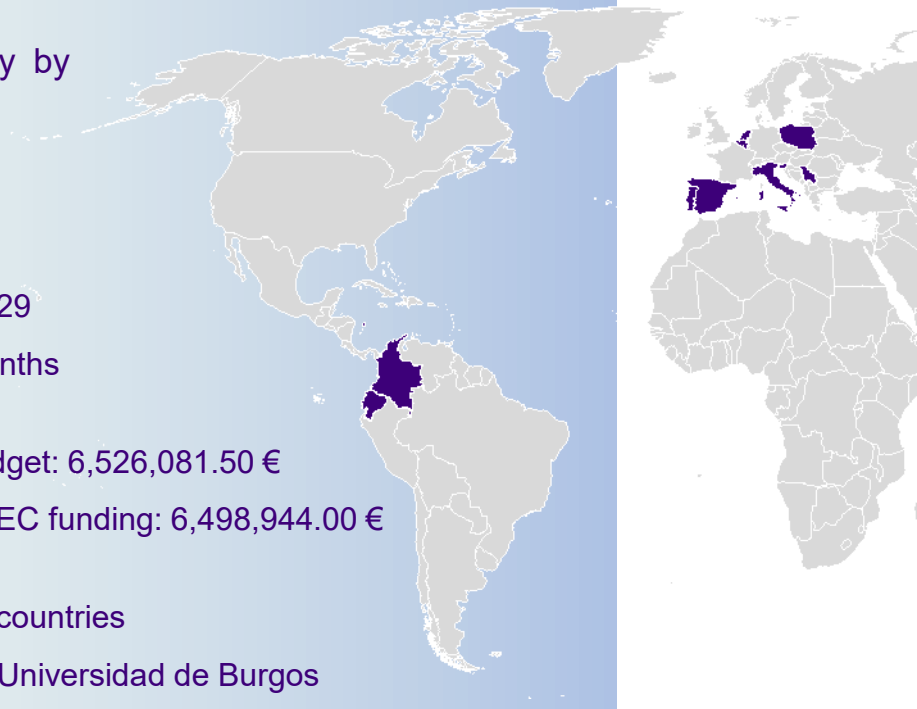
POMATO

EFFECTIVE MANAGEMENT STRATEGIES TO TACKLE CLAVIBACTER SEPEDONICUS AND RALSTONIA SOLANACEARUM OUTBREAKS ON POTATO AND TOMATO CROPS

No. 101181658

pomato.eu

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

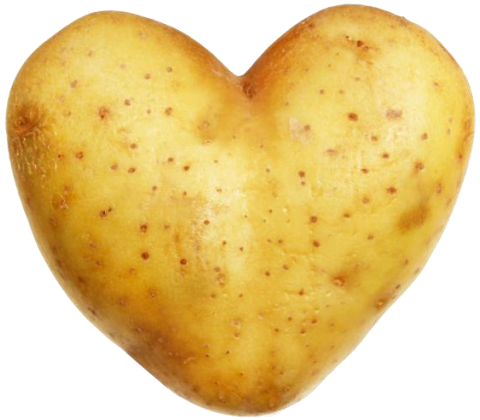
Coordinated by Universidad de Burgos

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.

since 1952

Europatat



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Thank you!

romans.vorss@europatat.eu

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

CropLife EUROPE

The Diminishing Farmers' toolbox

The EU Farmers' Toolbox in the last 7 years

86

NET LOSS OF CONVENTIONAL CHEMICAL AS

1 new chemical AS approved in the last 7 years

Was 8+ AS/yr (2008 - 2015)

87 chemical AS non-renewed, withdrawn or expired

6

NET LOSS OF BIOLOGICAL AS

20 new biological AS approved since 2019

26 biological AS non-renewed, withdrawn or expired

7

NEW BASIC SUBSTANCES

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

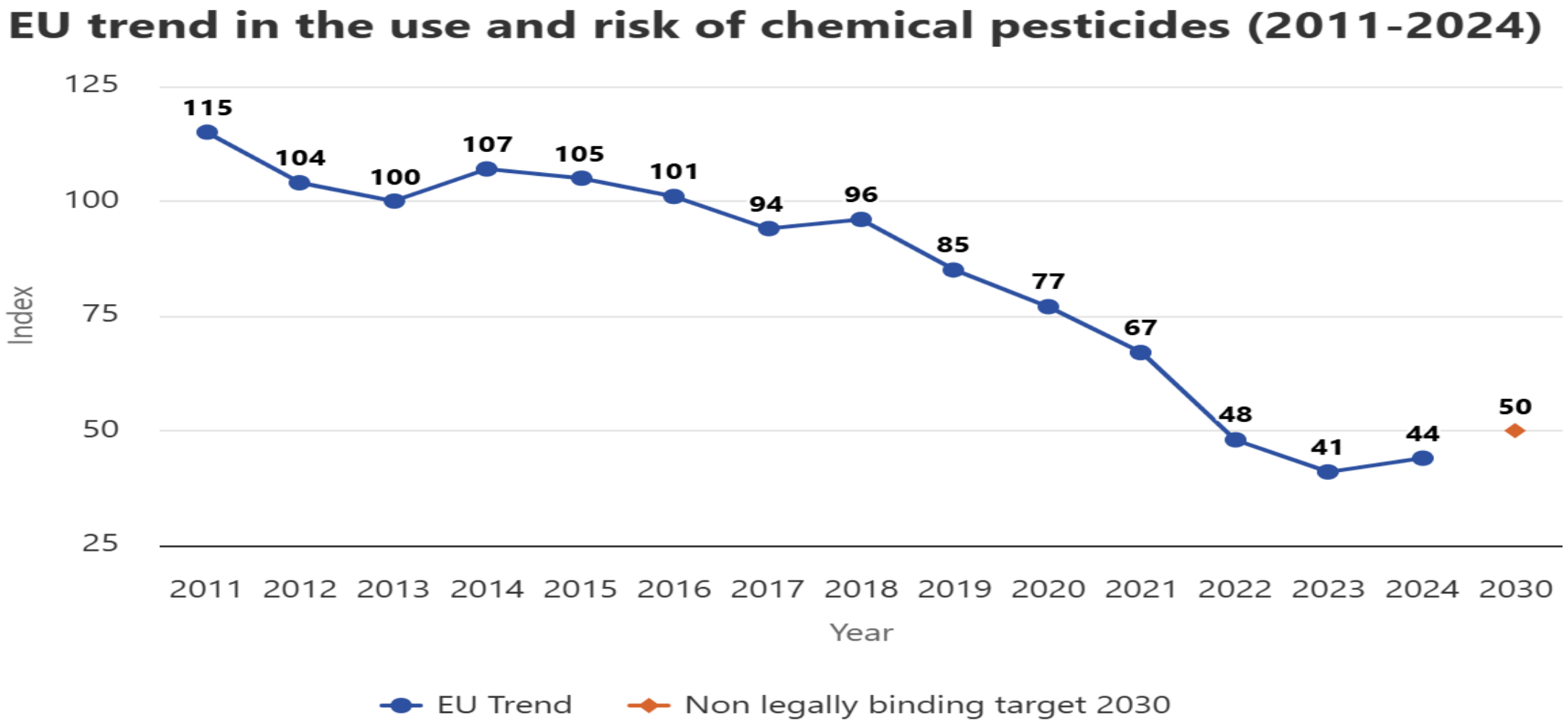
Based on current figures, this could mean that 89% of current active substances, including basic substances could receive unlimited approvals

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

CropLife EUROPE

Reduction of PPP use and risk in the EU

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



https://food.ec.europa.eu/plants/pesticides/sustainable-use-pesticides/pesticide-reduction-targets-progress/eu-trends_en

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

CropLife EUROPE

FOR MORE INFORMATION

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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

BlueN™

NUTRITIONAL EFFICIENCY

BlueN™: Advancing Potato Production Through Biological Innovation

Alberto Martín, Customer Technology Manager - Spain & Portugal

CORTEVA™ agriscience biologicals

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What are Corteva Biologicals Solutions?

Active Ingredients x Delivery Systems x Knowledge = Corteva Biologicals Solutions

Active Ingredients

- Nucleic acids (*e.g.*, RNA)
- Viruses
- Pheromones
- Plant extracts (or humics)
- Mn^{2+} Co^{2+} Zn^{2+} Micronutrients/ Nutritionals
- Live microbes (native & engineered)
- Microbial extracts (& metabolites)
- Proteins (& peptides)
- Plant Growth Regulators (PGRs / Plant Hormones)

Delivery Systems

- Foliar application
- In-furrow application
- Seed applied technology

Knowledge

- Plant Physiology
- Plant Nutrition
- Microbiology

Corteva Biologicals Solutions

- Utrisha™ N — NUTRITIONAL EFFICIENCY
- BlueN™ — NUTRITIONAL EFFICIENCY
- BioForge™ Advanced — STRESS MITIGATION
- Stimulate™ — PHYSIOLOGICAL SUPPORT
- Keylate™ Fe — NUTRITIONAL FOUNDATIONS
- Rezist™ — PLANT HEALTH
- Maxfoli™ K — NUTRITIONAL FOUNDATIONS
- Thydra™ — DISEASE MANAGEMENT
- Tezpetix™ — INSECT MANAGEMENT
- Rizotec™ — NEMATODE MANAGEMENT

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Utrisha N™ / BlueN™:
The secret to empowering your crops

What it is:

- **A unique microorganism**, *Methylobacterium symbioticum* strain SB 23, which is naturally occurring symbiotic bacterium that colonizes leaf tissue.
- **Utrisha™N / BlueN™ benefits go beyond N supply**. It's an effective nutrient use efficiency tool to promote plant performance.
- **Consistent yield gains with a high frequency of positive results (above 78%)** under different edaphoclimatic conditions and agricultural practices on several crops incl. **potato**.

Key benefits:

- Supports **continuous nutrient efficiency** by enhancing multiple metabolic functions.
  - ✓ Nutrient use efficiency
  - ✓ Sustained photosyntesis
  - ✓ Foliar activity
- **Environmentally friendly**, foliar applied, organic approved and provides great **return on investment** across a wide range of crops and under varying conditions.

NUTRITIONAL EFFICIENCY

Control | **Utrisha™ / BlueN™**

Key crops
Corn, Soybean, Wheat, **Potato**

Regions
NA, EMEA, LATAM, APAC

Utrisha™N NUTRITIONAL EFFICIENCY

BlueN™ NUTRITIONAL EFFICIENCY

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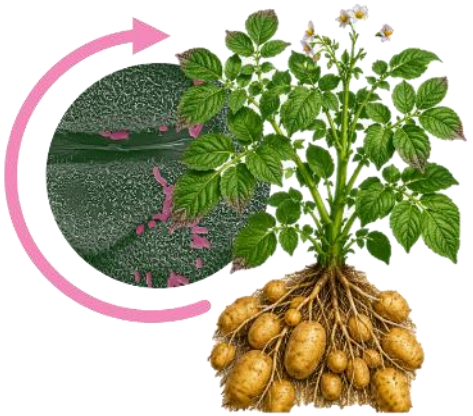
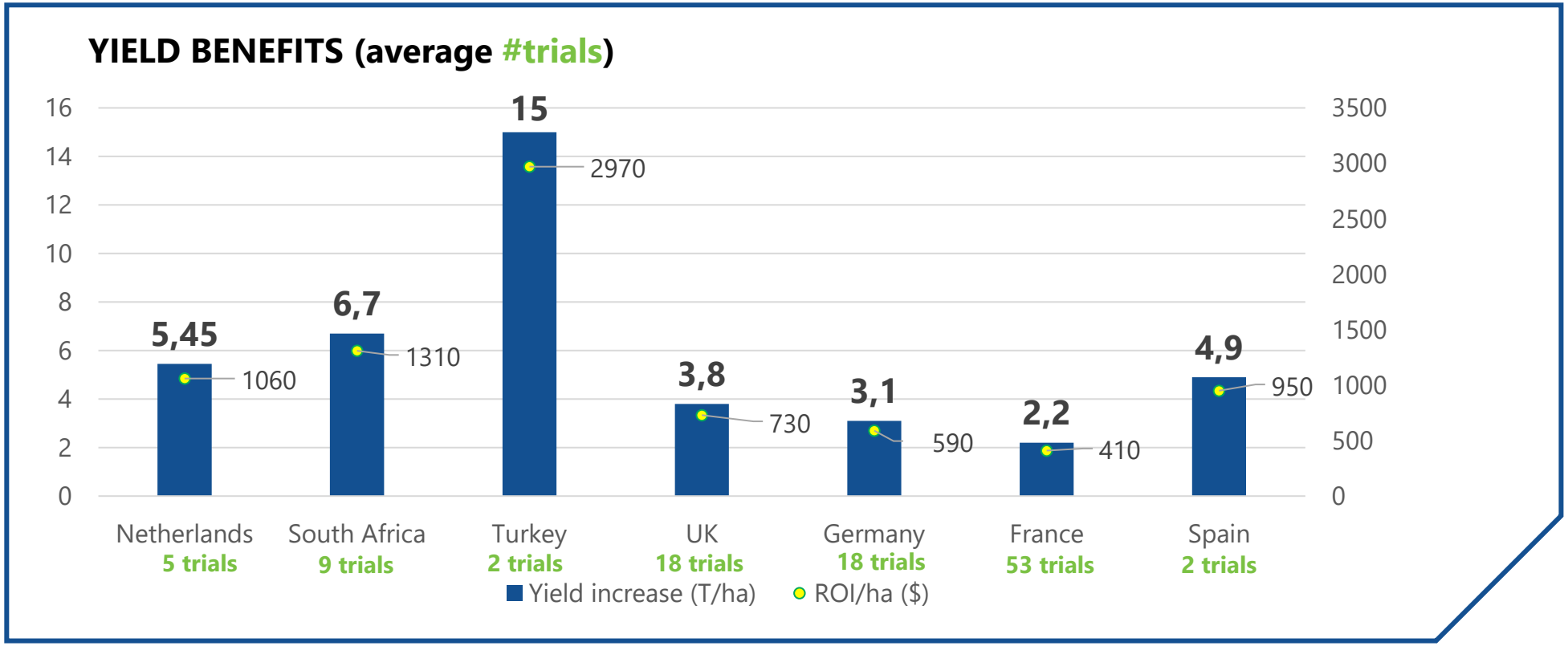
BlueN™ Delivers Consistent Potato Yield Benefits Across Diverse Growing Conditions

BlueN™
NUTRITIONAL EFFICIENCY



Field and Demo Trial Results | Europe, Middle East and Africa (2021-2025)



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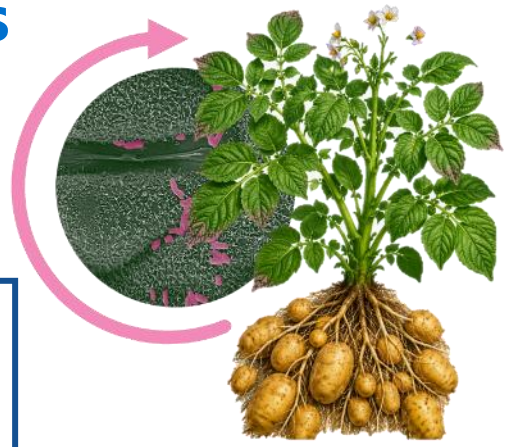
BlueN™ NUTRITIONAL EFFICIENCY

BlueN™ Delivers Positive Yield and Tuber Benefits in Potatoes

Field and Demo Trial Results | Europe, Middle East and Africa (2021-2025)



Visual differences in the fields

Control

BlueN™ NUTRITIONAL EFFICIENCY

Germany (Bavaria) 2022, Innovator

Control

BlueN™ NUTRITIONAL EFFICIENCY

+6% tubers
+16% yield

Netherlands 2022, Innovator

CORTEVA™ agriscience biologicals

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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

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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 INTERNACIONAL DE PATATA

Patrocinadores:

Platinum:

cipp club ibérico de profesionales de la patata

CORTEVA agriscience

biologicals

Oro:

ASONAL

DEPREZ Taking better care of goods

Plata:

ASOPOCYL

FMC An Agricultural Sciences Company

HZPC ROYAL HZPC GROUP

Junta de Castilla y León Consejería de Agricultura, Ganadería, Medio Rural y Política Ambiental

ISK Local Insight, Global Impact

Princesa Amandine

TELEOS AG SOLUTIONS

Colaboradores:

ADAMA

AGRICO ESPAÑA

aguilar

appse Asociación de Productores de Patata de Siembra de España

asociafruit

BASF We create chemistry

CARSA

fedepom

SOMOS HIJOLUSA

Ibérica de Patatas Sembrando Confianza

MEIJER POTATO

Norika

syngenta

udapa

GV El Zamorano

Let´s continue in the cocktail!

I SIMPOSIO INTERNACIONAL DE PATATA

MADRID