

2025 Potato Business Summit



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Cedric Porter

Editor

World Potato Markets

马铃薯

peruna

มันฝรั่ง

πατάτα

spud

картопля

картофель

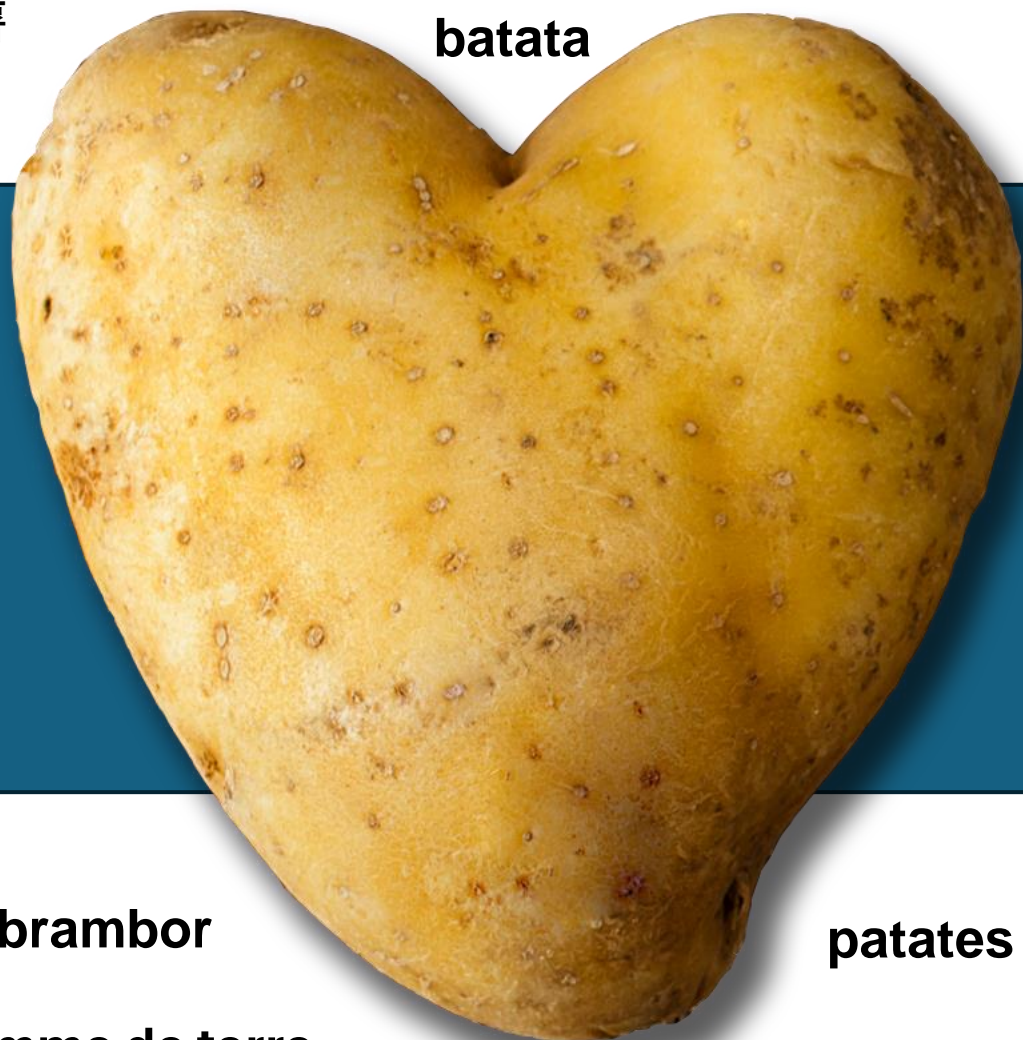
batata

cartof

kartoffel

patata

ジャガイモ



European market Update

Cedric Porter, Editor - World Potato Markets

brambor

patates

taties

pomme de terre

감자

krumpir

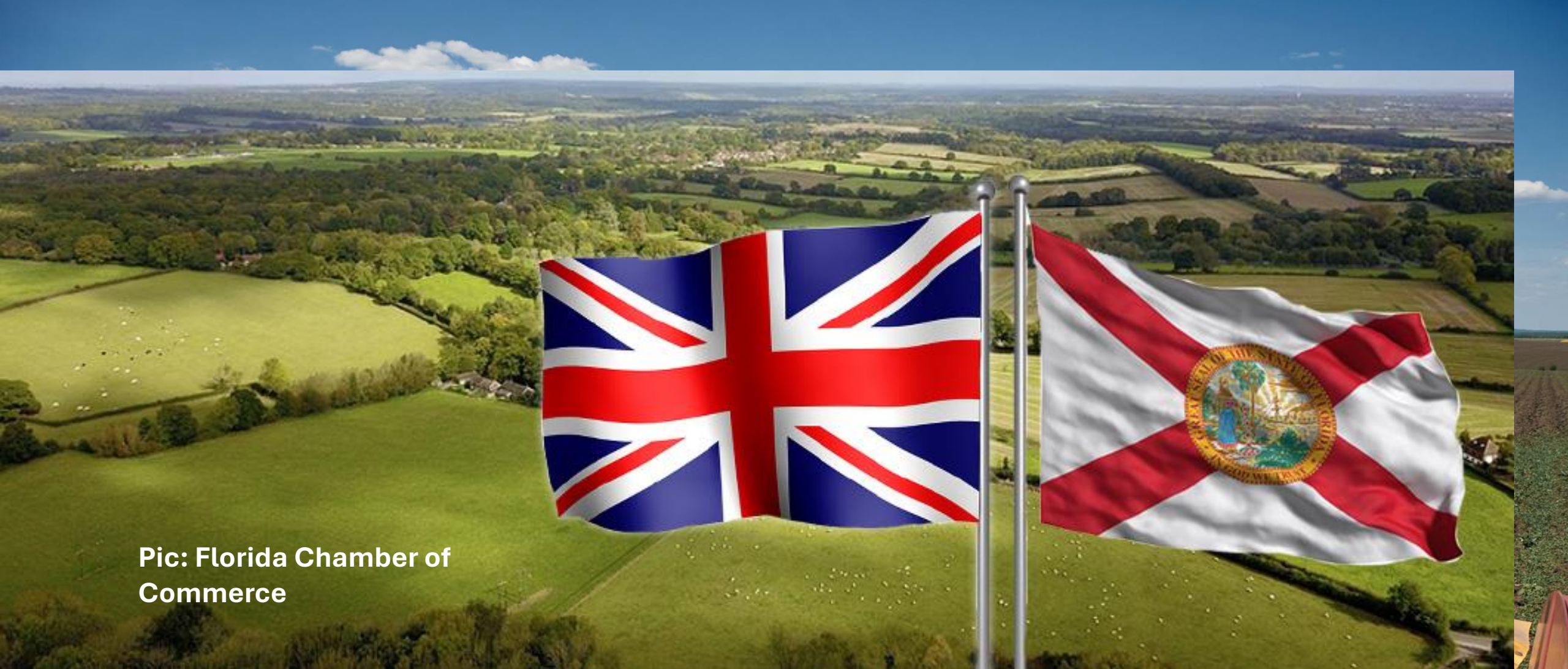
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Pic: Florida Chamber of Commerce

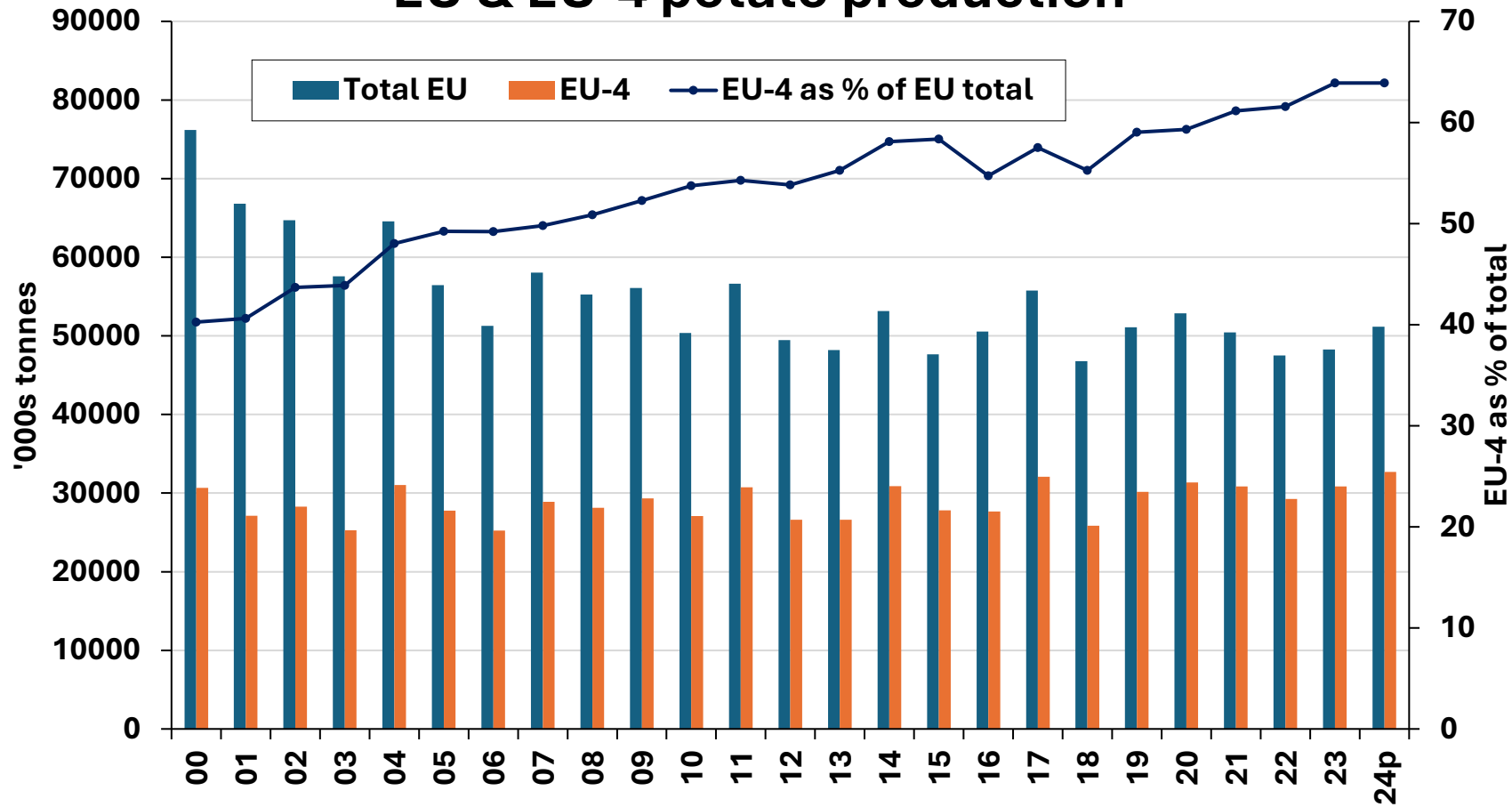


What areas am I looking at?

- European production
- European weather
- European processing
- European weather
- European trade
- China and India update
- A special potato treat

Potato Business Summit

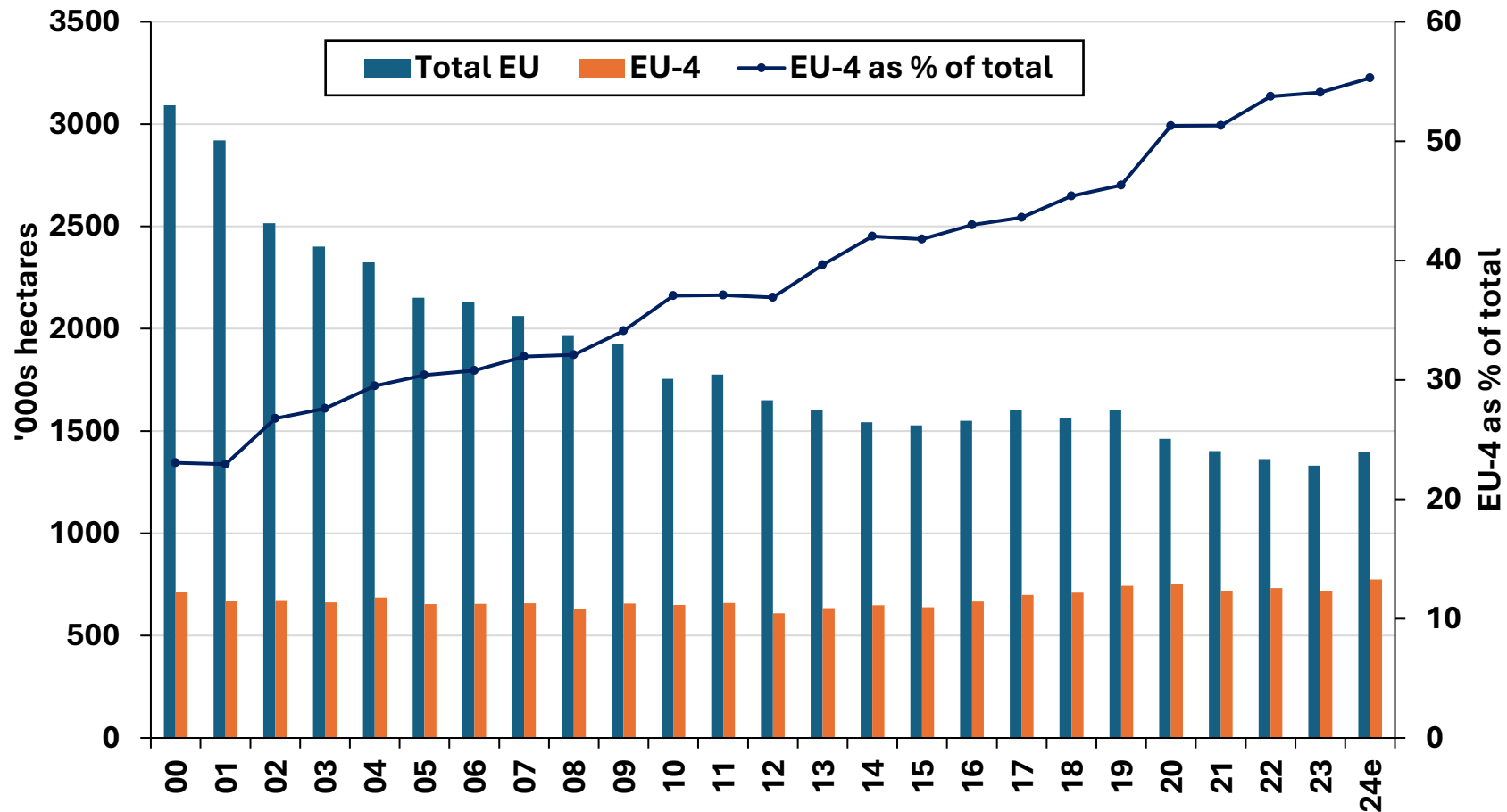
EU & EU-4 potato production



EU production is a little larger than last year but similar to 2021. Output in the EU-4 (Germany, France, Netherlands and Belgium) could be the largest ever and 2/3 of EU production

Source: Eurostat and World Potato Markets

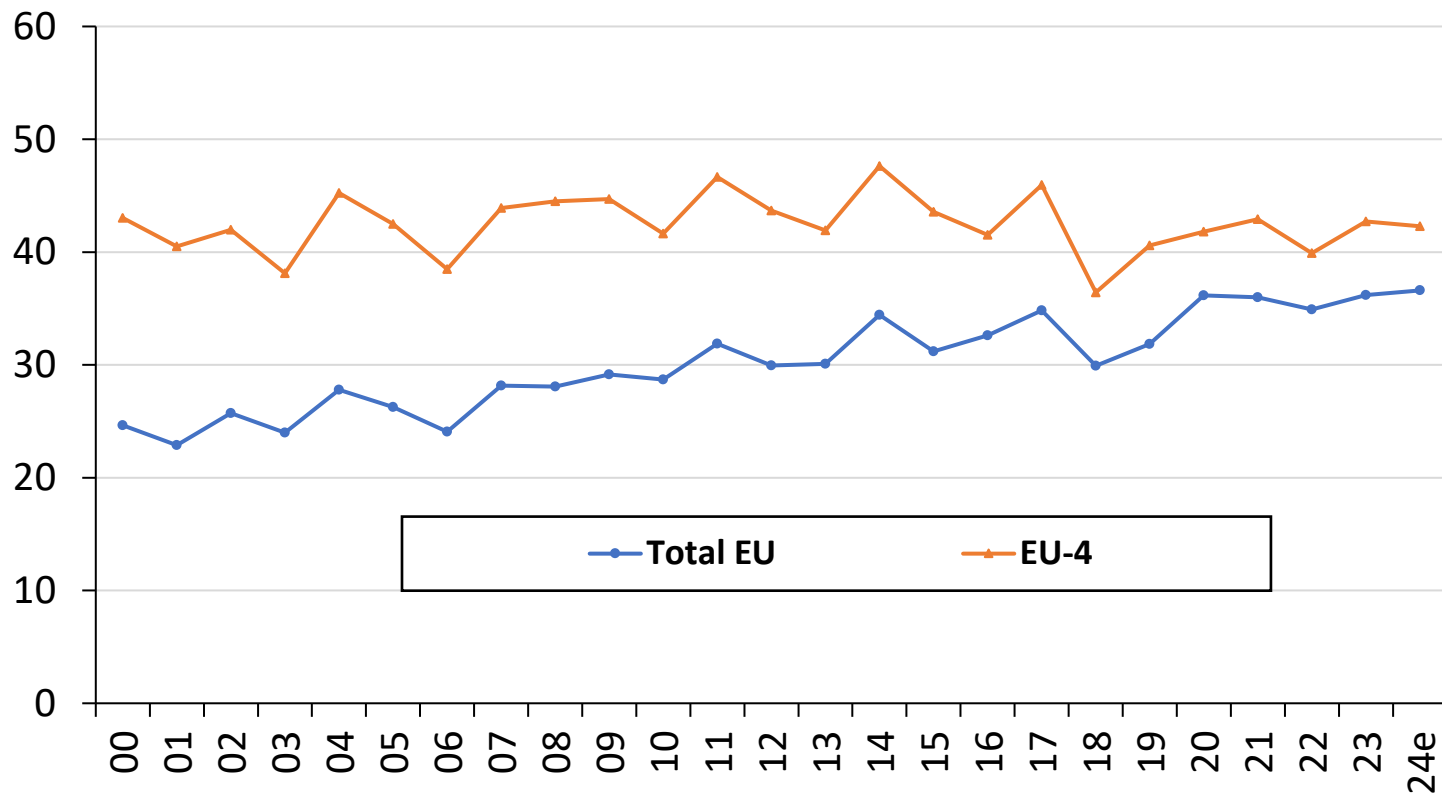
EU & EU-4 potato area. Source: Eurostat & WPM



The EU area has reduced by 55% since 2000, with the EU-4 share rising from 23% to 55%

Source: Eurostat and World Potato Markets

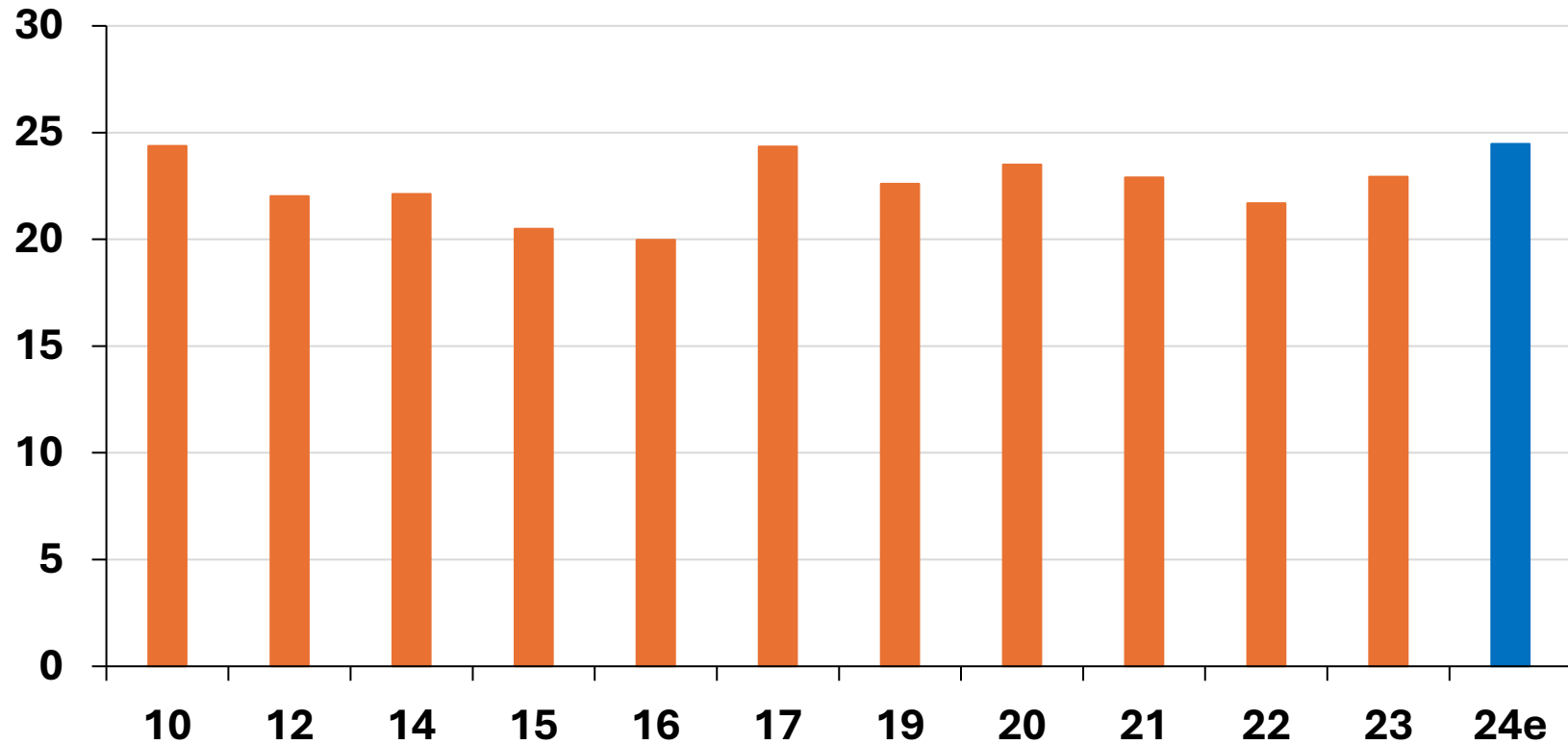
EU & EU-4 average yields in tonnes/hectare



Average EU yields have been increasing but not in the EU-4. There has been a slowdown in yield development over the last five years.

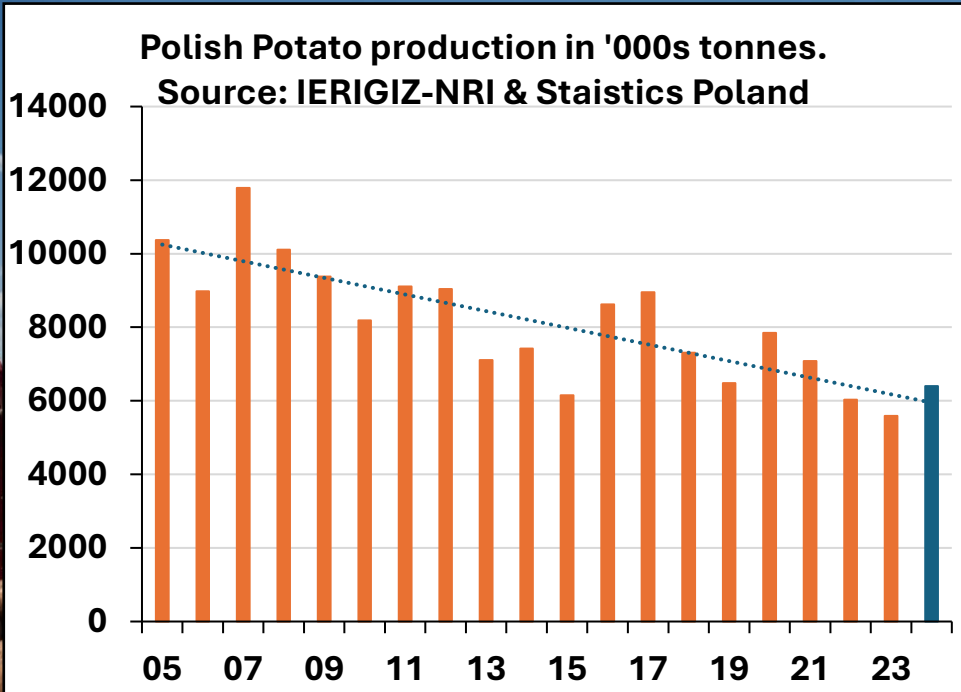
Source: Eurostat and World Potato Markets

EU-4 potato production million tonnes. Calculations based on NEPG figures

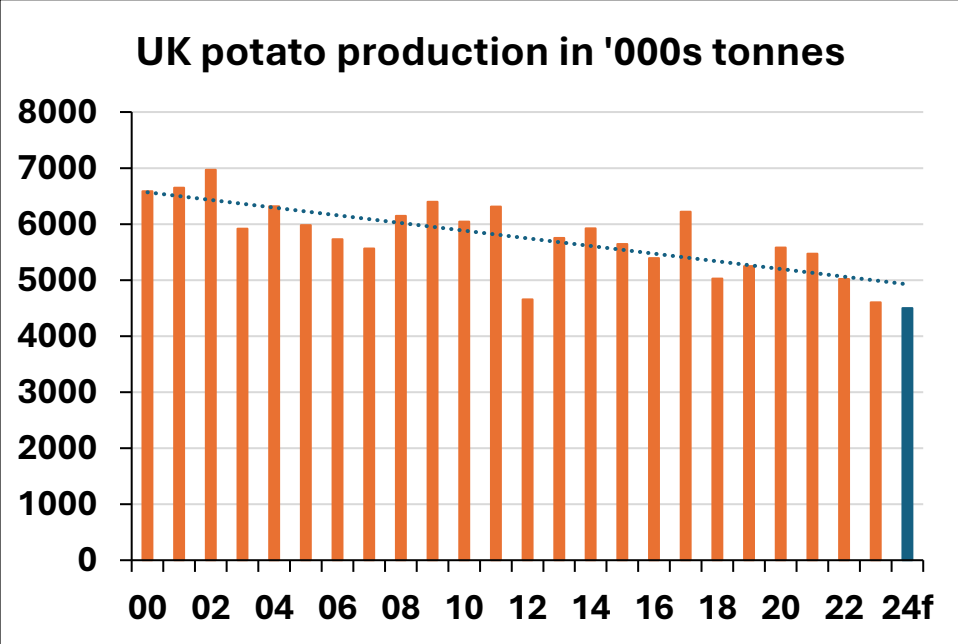


The EU-4 have produced a record crop (only just)! France & Belgium had record crops and Germany its largest for 20 years. These countries account for 90%+ of the EU's potato exports

Source: NEPG and World Potato Markets



Production Poland recovered a little, but UK output was probably at a record low





European weather is becoming more extreme as witnessed by the recent Spanish floods. England has had a third more rain than normal in 2024.

2018 Drought

2019 Wet fall

2020 Covid

2021 Covid & Brexit

2022 Drought & Invasion of Ukraine

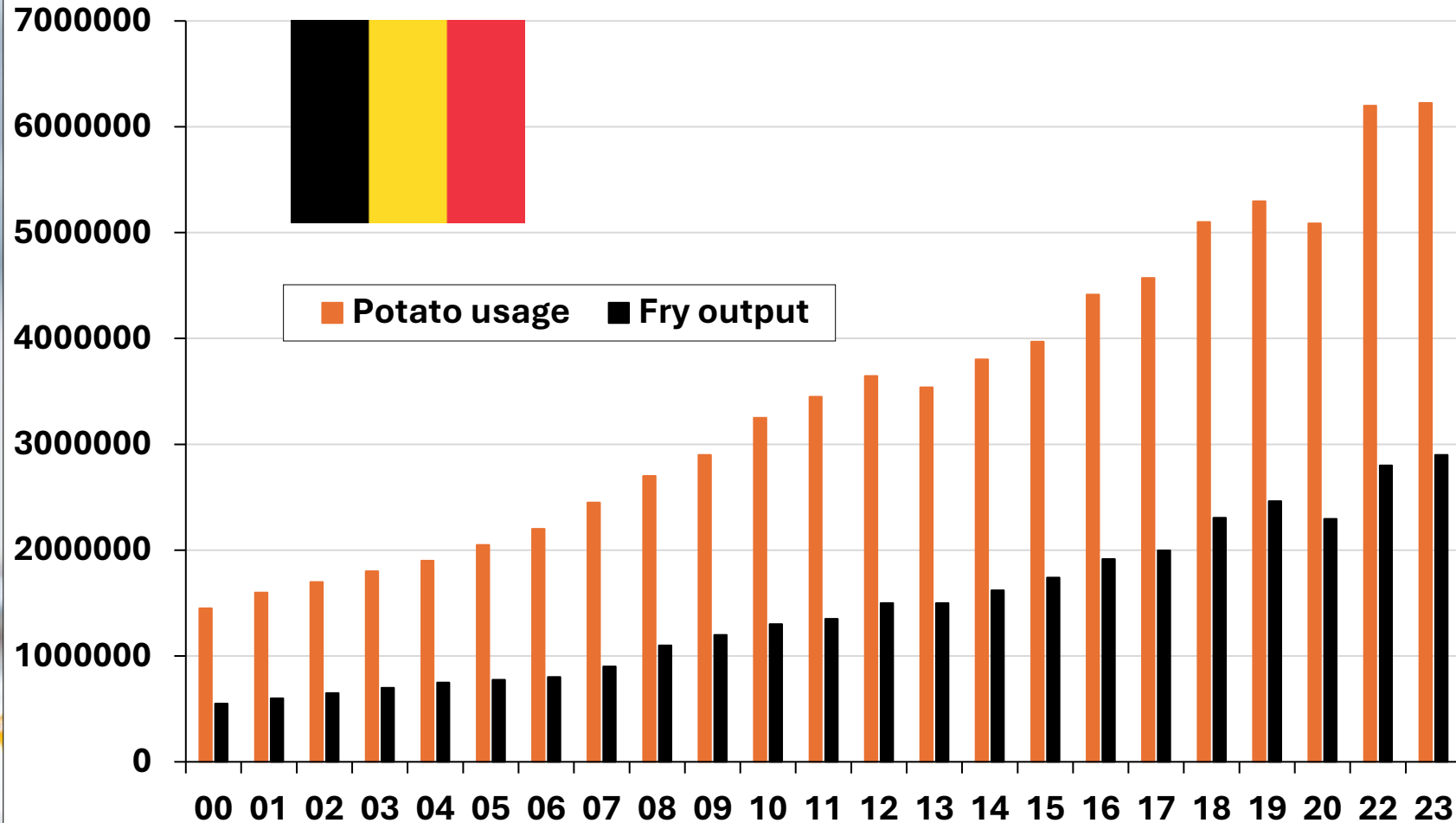
2023 Wet spring & fall

2024 Wet spring. Floods in Spain & Eastern Europe

2025 Tariffs, weather events, political uncertainty???

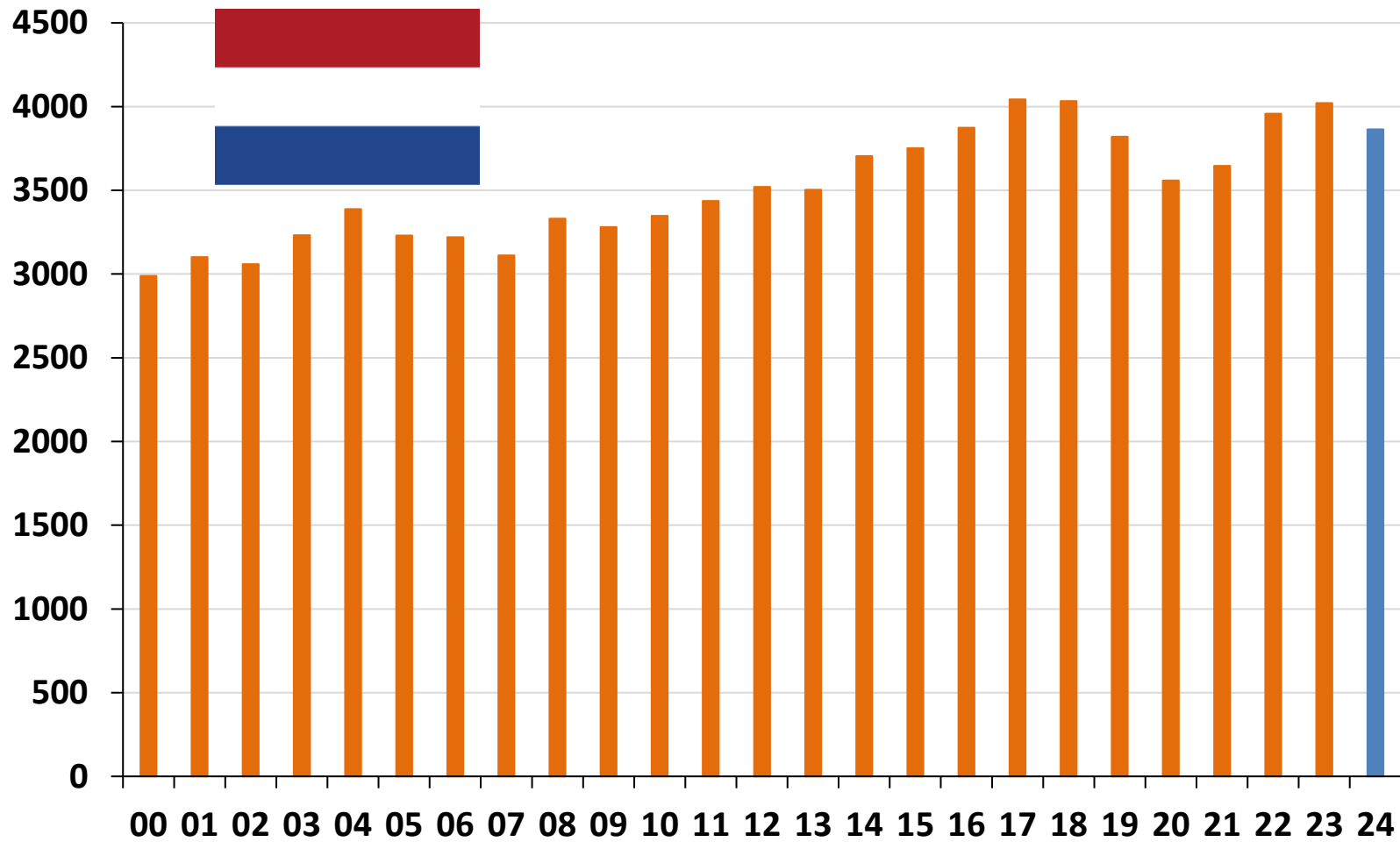
European potato growers have not experienced a 'normal' year for years. That has made people nervous of growing potatoes

Belgian processing potato usage and fry output in tonnes. Source: Belgapom



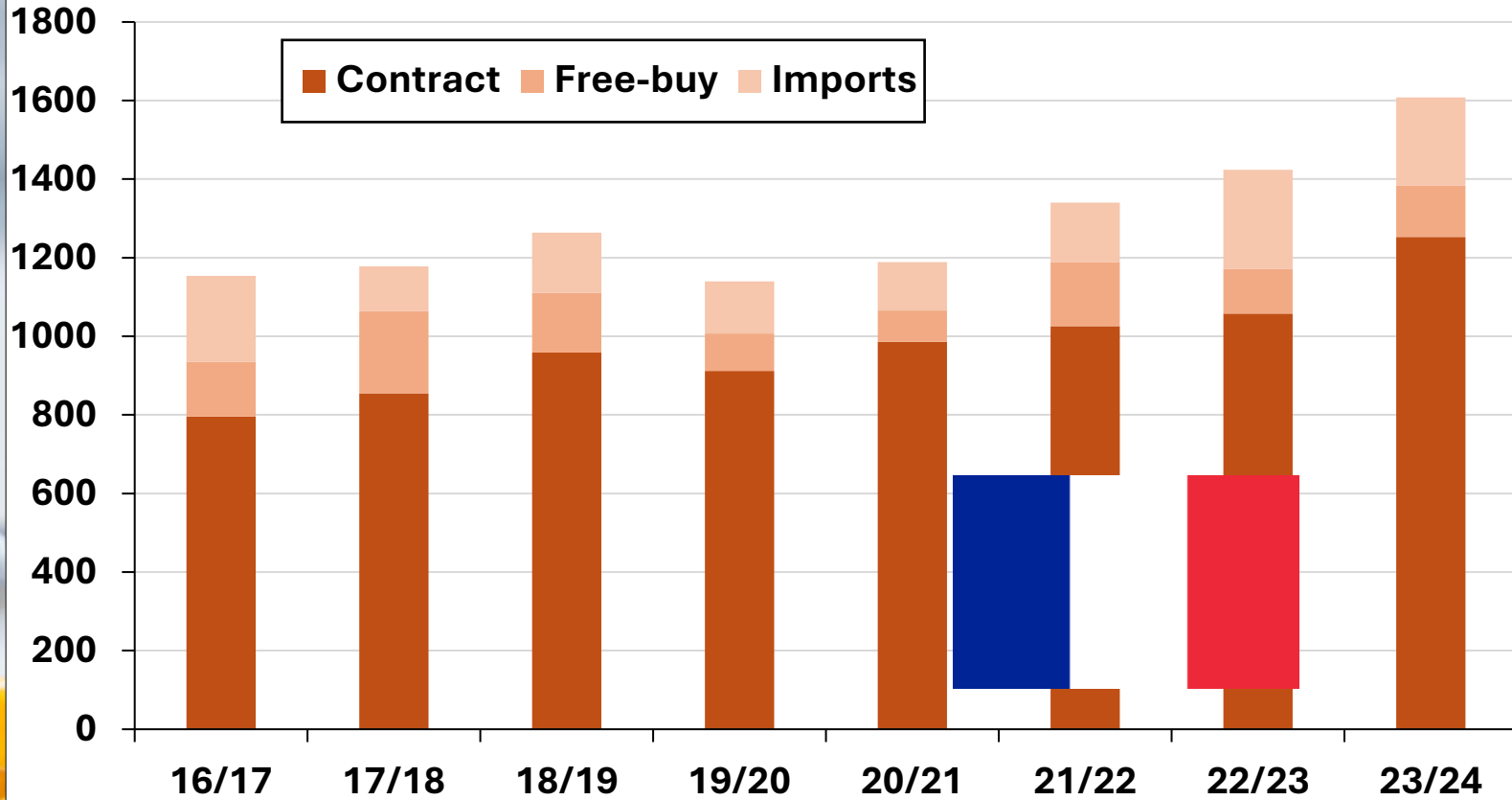
The growth in Belgian processing production has been outstanding – up 425% since 2000. But it may have peaked

Annual Dutch processing potato usage in July to June seasons in '000s tonnes. Source: Vavi



Dutch processing output has peaked with little room for expansion

French processing potato usage July to June in '000s tonnes. Source: GIPT/UNPT



The fry is coming home – but don't tell the Belgians! French processing output was up 18% in 2023/24 and 40% between in the previous seven years. It will be even higher in 2024/25.



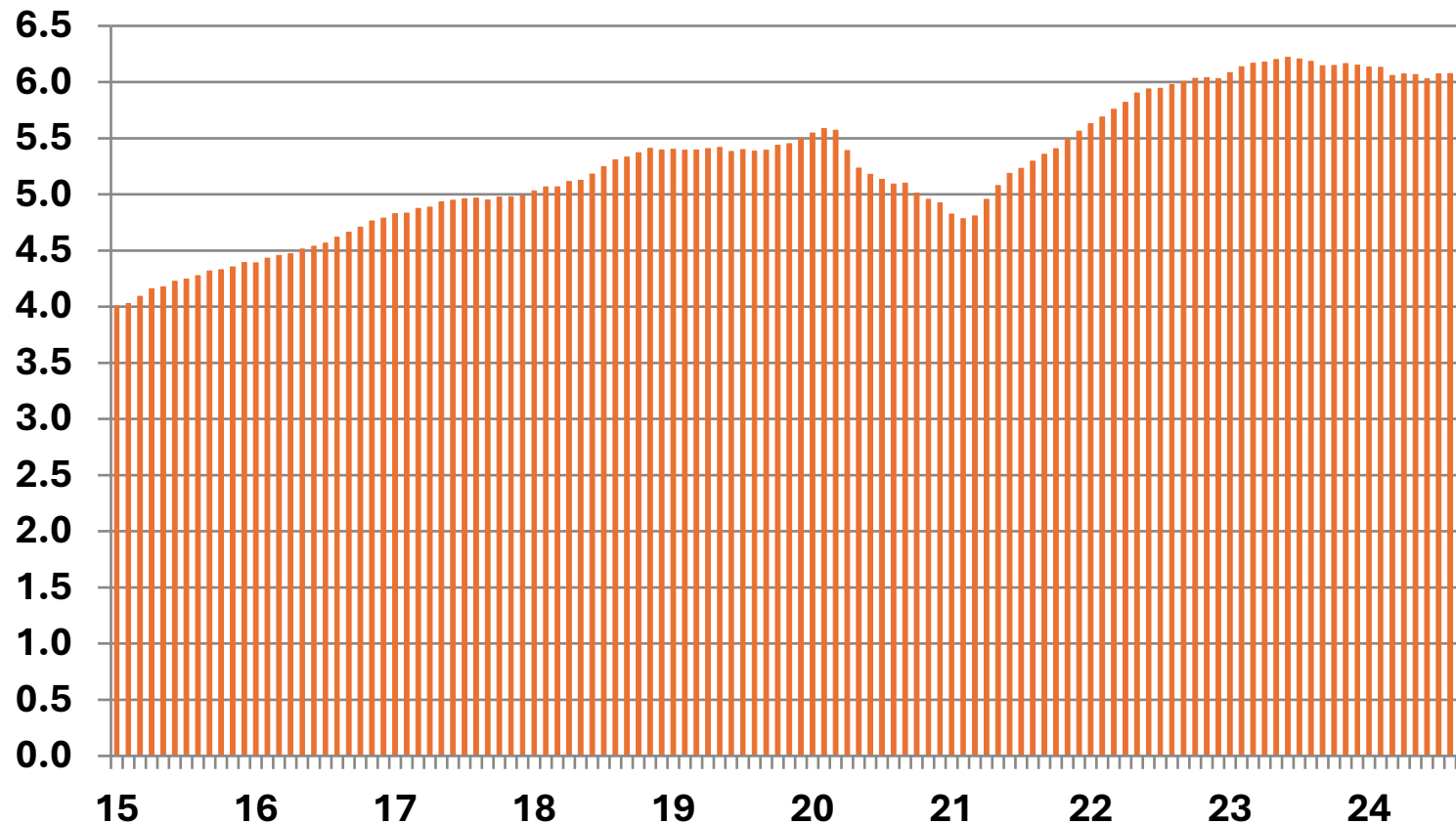
Ecofrost | GOOD WITH POTATOES

Agristo
we love potatoes



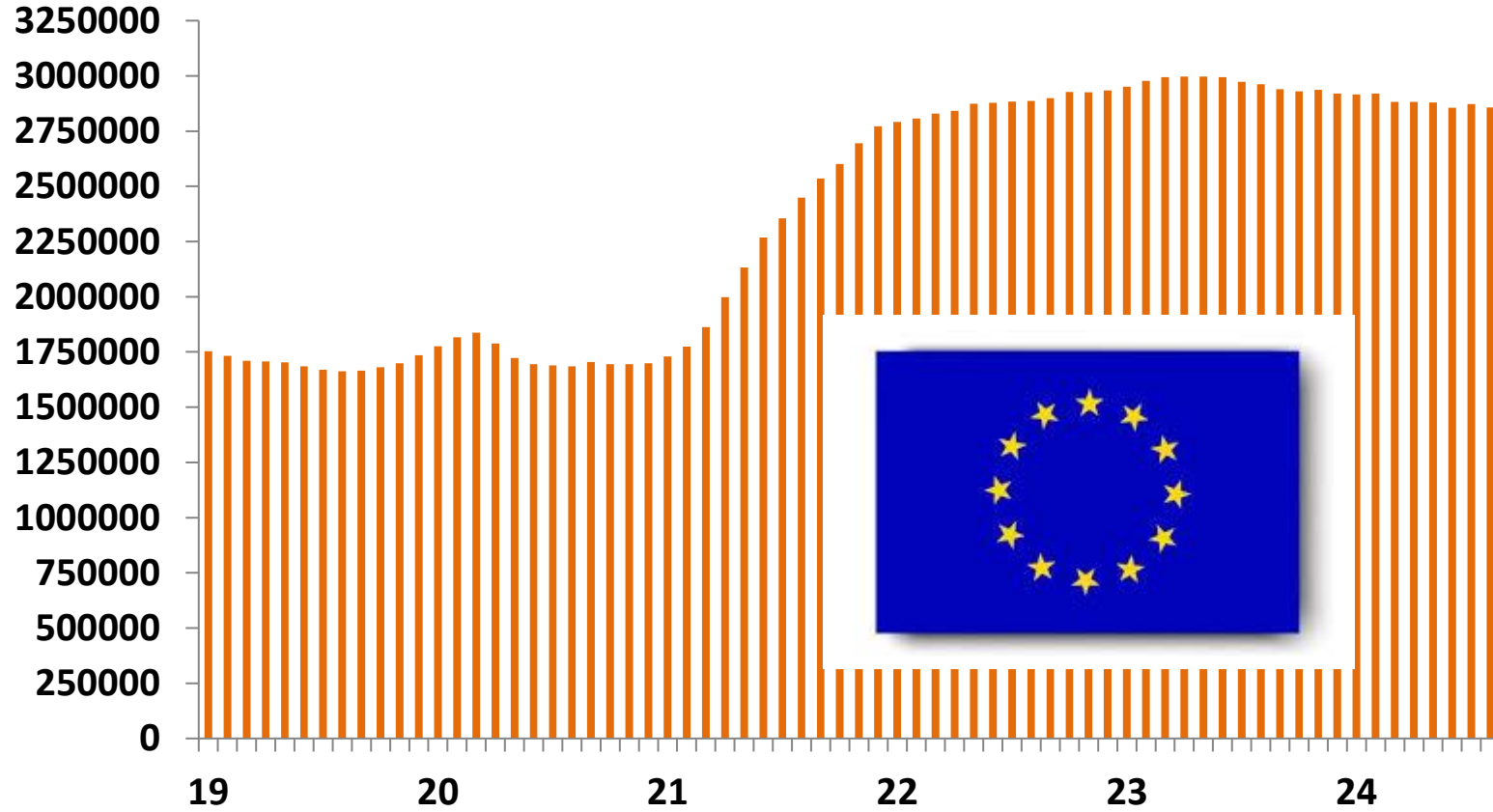
Someone has told the Belgians!
Clarebout has built a plant just over the border in France. Agristo and Ecofrost are building others. Agristo has intentions of building US plants too. Meanwhile, McCain is investing US\$363 million to increase French output by 25%

EU-5 fry exports (12-month periods (million tonnes))



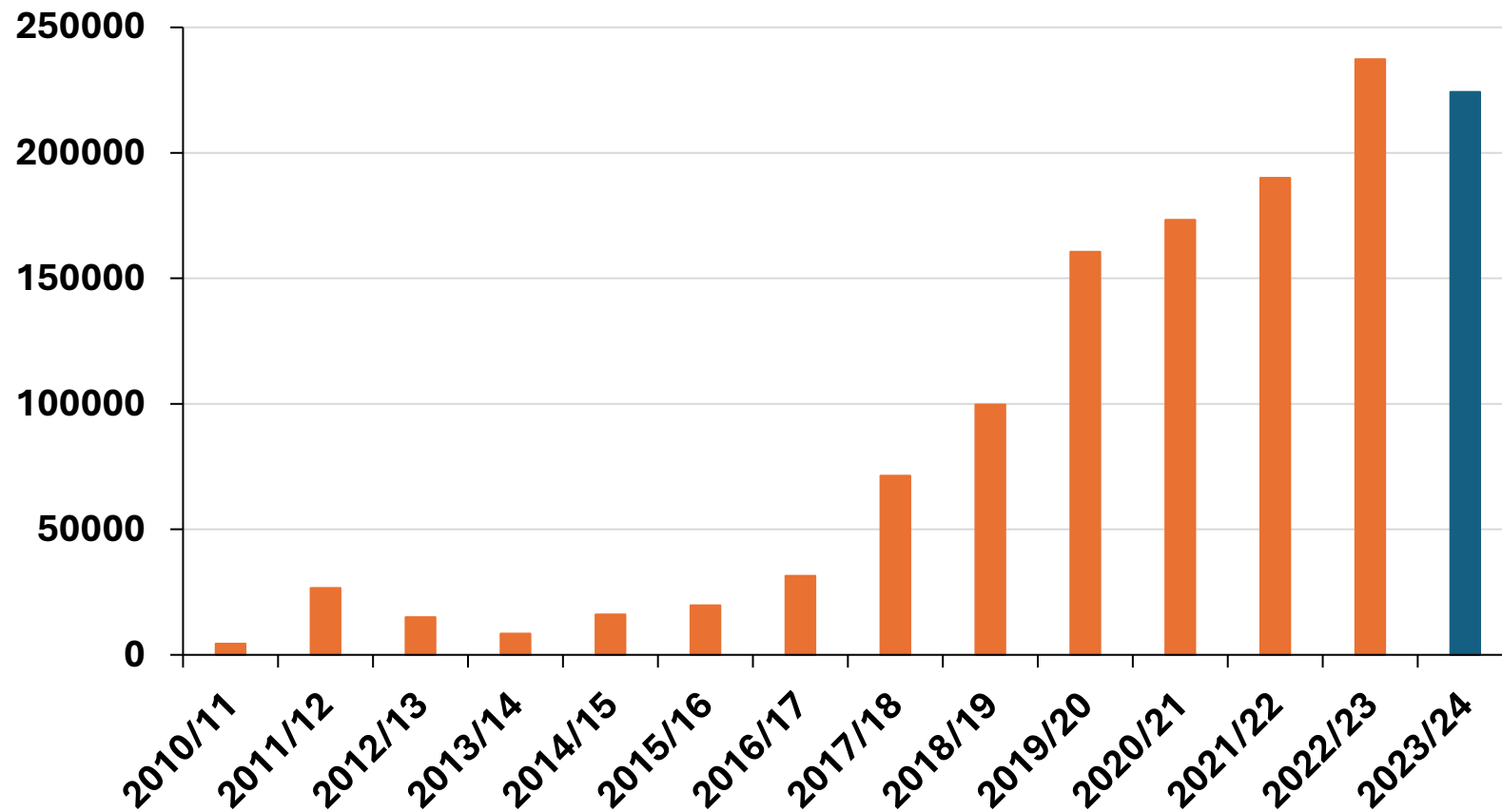
EU frozen fry exports bounced back strongly after Covid, but have come under pressure since. The EU-5 is Belgium, Netherlands, France, Germany & Poland

EU-27 fry exports, 12-month periods (tonnes)



Crucially for you, sales outside the EU are under pressure

EU frozen fry exports to the US in tonnes



EU frozen fry exports to the US have peaked

There are some disrupter players

China fry exports. Years to September



2018/19
20,760
tonnes

2023/24
171,000
tonnes
(+723%)

India fry exports. Years to September



2018 **18,000**
tonnes

2023/24
189,000
tonnes
(+1720%)

Increased processing capacity (especially in China) could mean further increases in exports

Linking Environment And Farming



LEAF – Linking Environment And Farming has been working with farmers and food companies for 30 years in more than 30 countries. It will have an even greater role over the next 30 years.
www.leaf.eco

Thank you for your attention

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Developing the world's first textiles out of potato haulm



david@fibe.uk

David Prior Hope - CTO & Co-Founder



**Potato Farms
+ Sustainability
+ Profit**



**Clothing Brands
+ Sustainability**

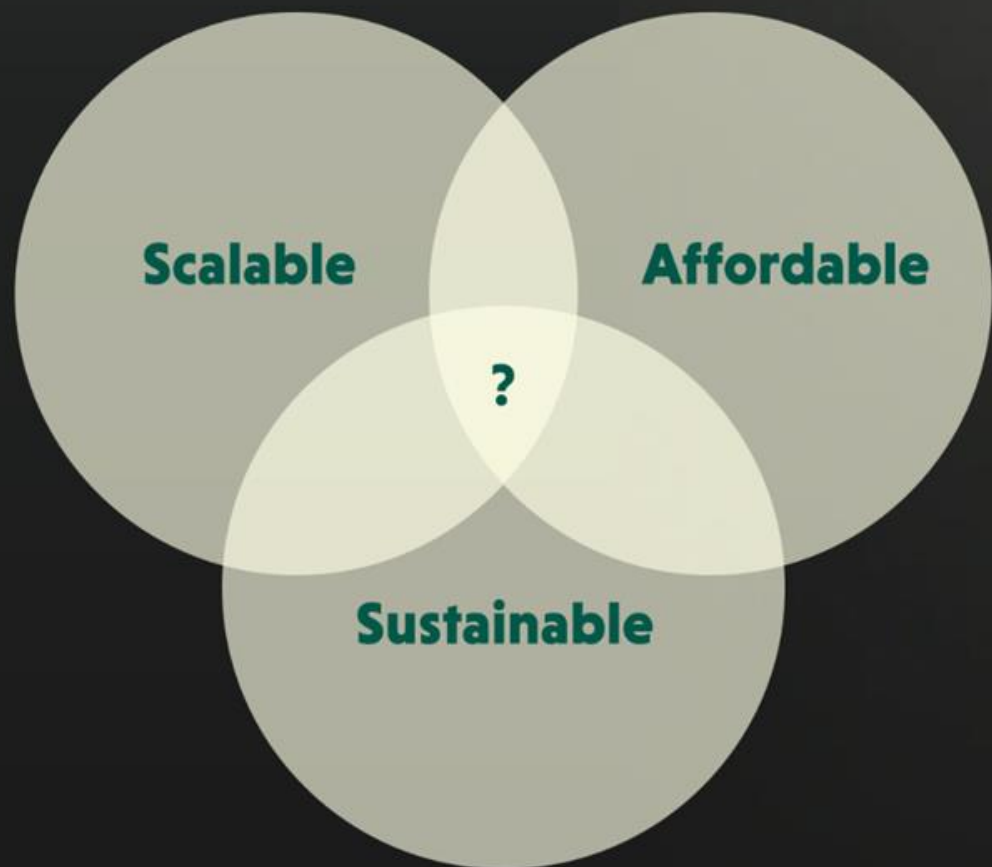


**By 2030 demand
for eco-textiles
may exceed supply
by 133M tonnes**

-BCG



Lack of available solutions



150M Tonnes

Potato Stem Discarded Globally



Patent pending technology



Affordable



Quality



**Low resource
consumption**





GRIMME



No hassle



**No tuber
damage**

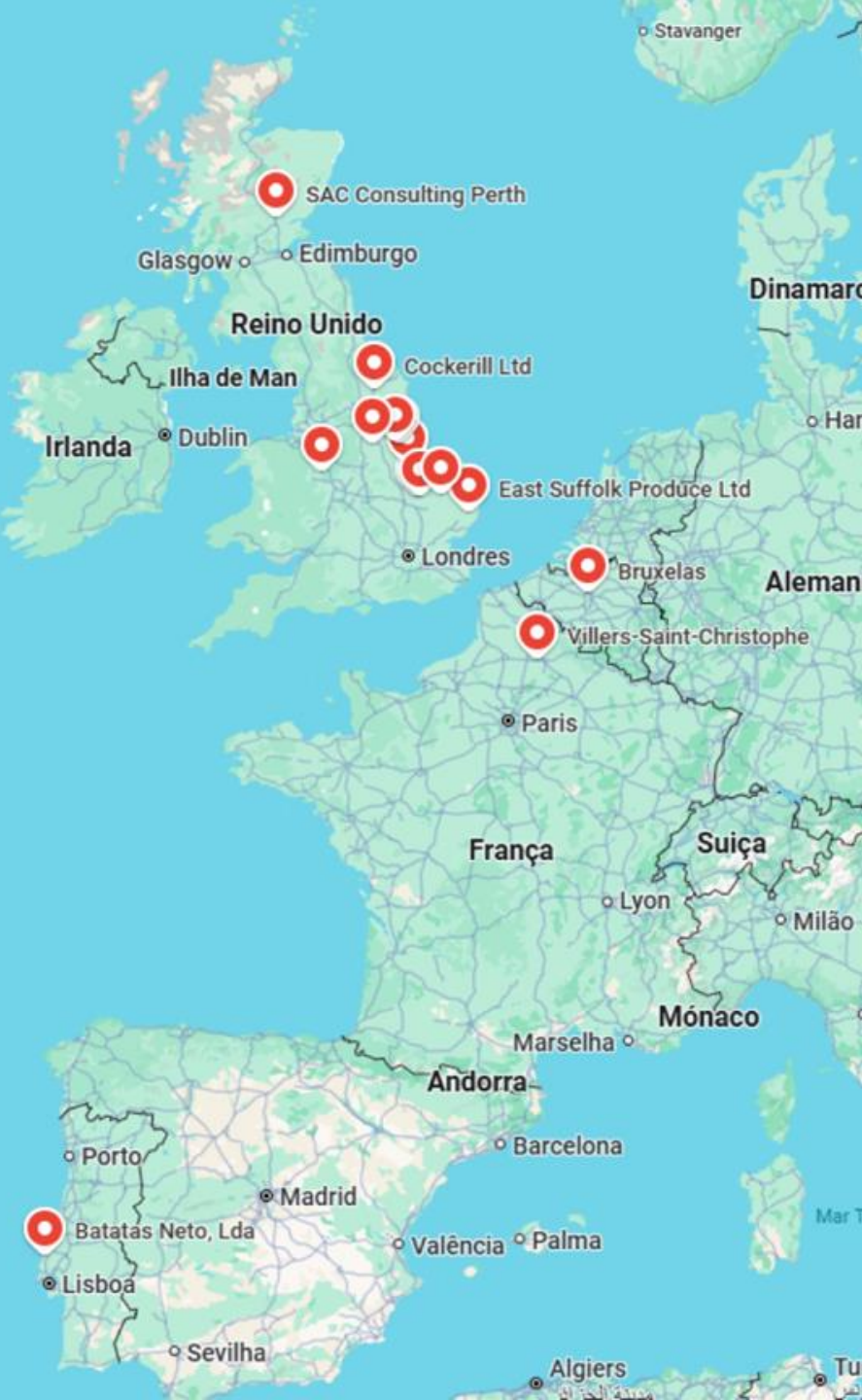


**New supply
chain**

We have sampled across the world



410+ fields
90+ varieties



David
CTO

Premal
CPO

Hazel
CIO

Idan
CEO



- **Raised \$2.8M**
- **Team 14**
- **Validated product**
- **Scaled technology**



**Sustainable
innovations
brands**

+\$440M

STELLA McCARTNEY

PANGAIA

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adidas

2024

2025

2026

2027

2028

2029

2030

2031



**Sustainable
innovations
brands**
+\$440M



TOPSHOP



PRIMARK®



**Fast
Fashion
Brands**
\$1.2B

A female scientist with blonde hair in a braid, wearing safety goggles and a white lab coat, is focused on a tablet device. She is standing in a laboratory filled with complex machinery, including blue tanks and various pipes. The background is slightly blurred, emphasizing the scientist and her work.

£3M round

- Pilot production facility
- Revenue generating

Let's connect



- Investment
- Potato buyers
- Innovative players

As seen on:

NewScientist



fibe

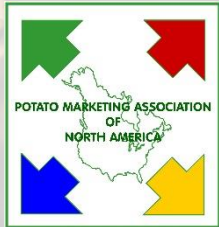
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