

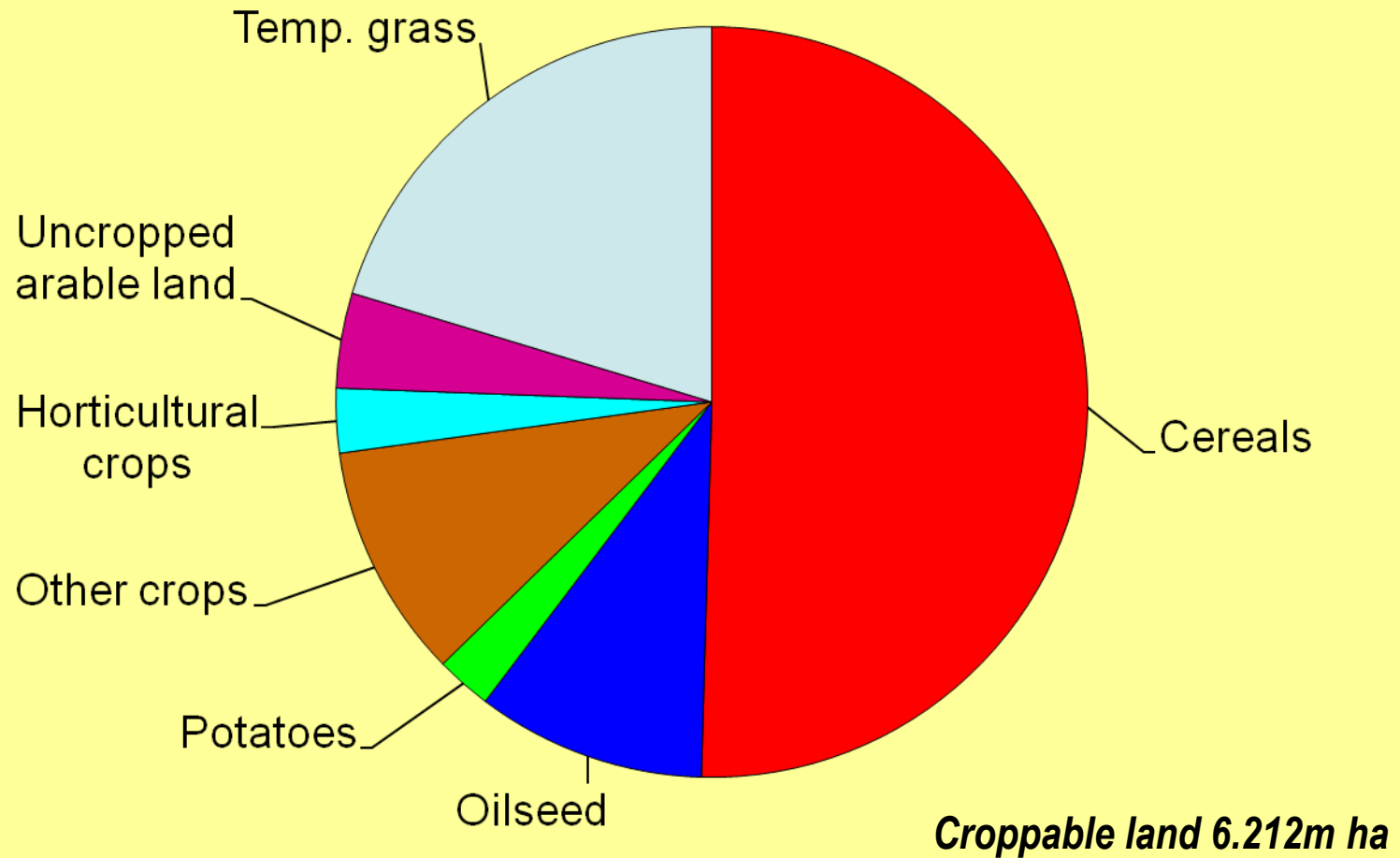
Fresh Potato Suppliers Association

Delighting the Customer Drives Change

Europatat Conference 2010 – Edinburgh

David Walker

Land Use 2009, United Kingdom

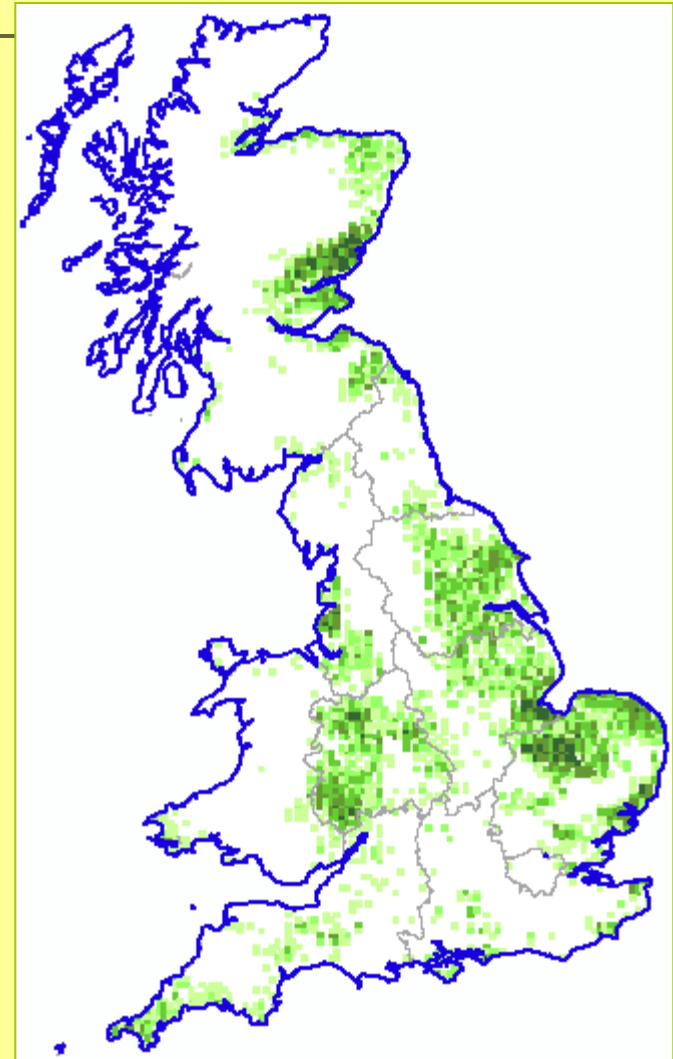
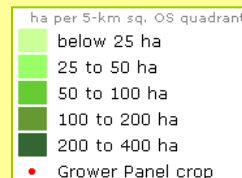


TIFF = £4.07 billion

Agric. % GDP = 0.6

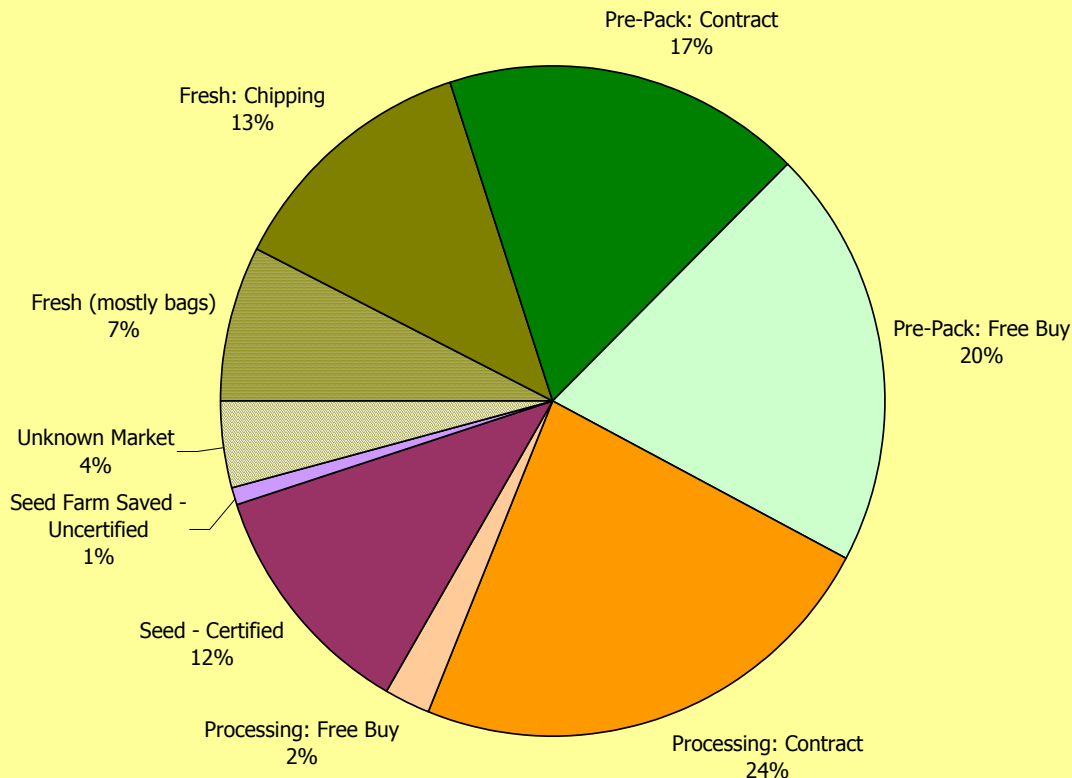
Where Potatoes Grow

- Eastern England & Yorkshire have 52% of plantings
- Scotland has 22%, of which c. 40% is seed
- West Midlands has 11% of plantings
- Remainder of England and Wales have 12%
- South West and Pembroke mainly early crop
- Plantings correspond to arable soils map



Tables and map are taken from the Grower Panel website www.bpcgp.com

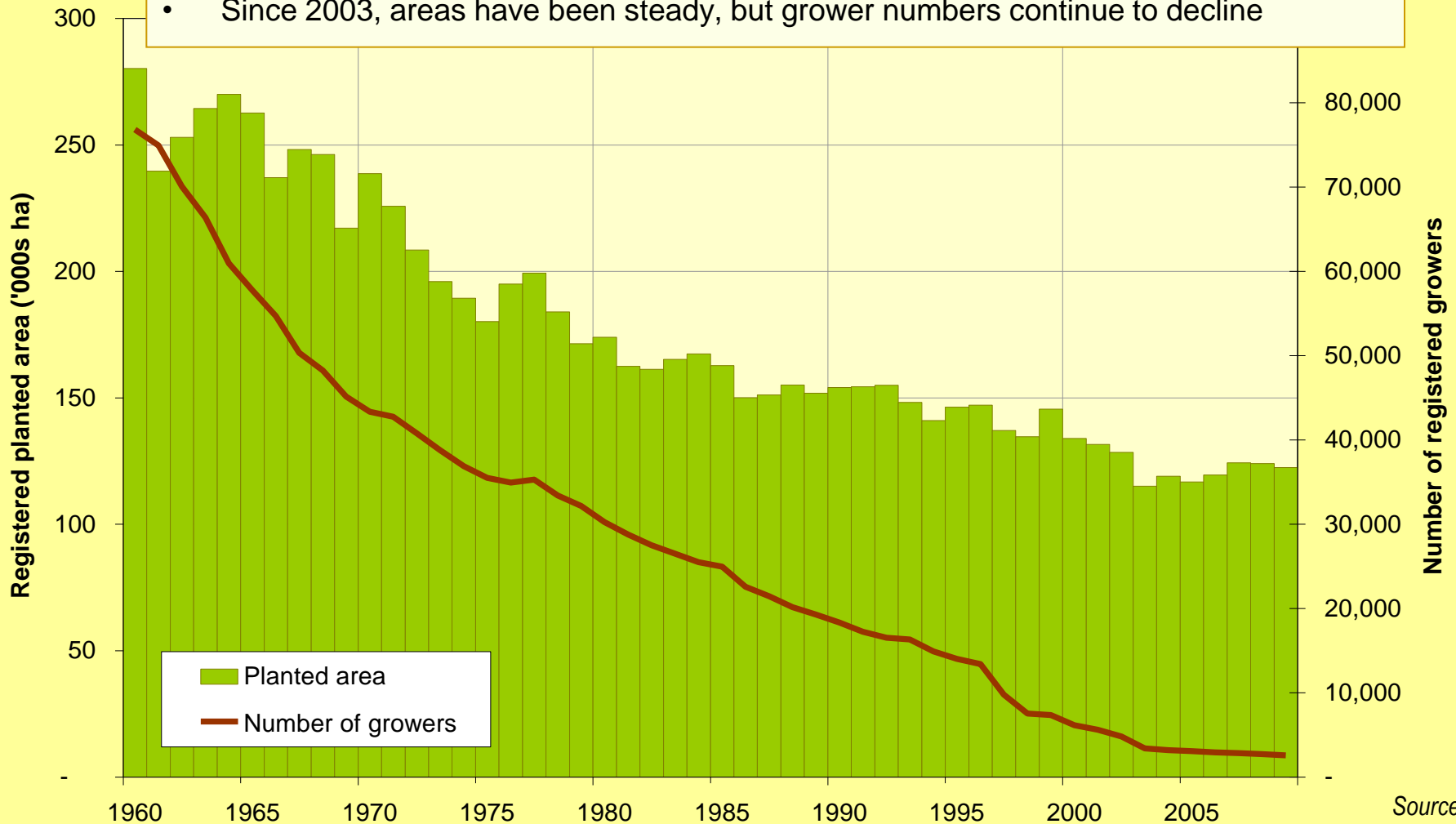
Areas grown by market sector



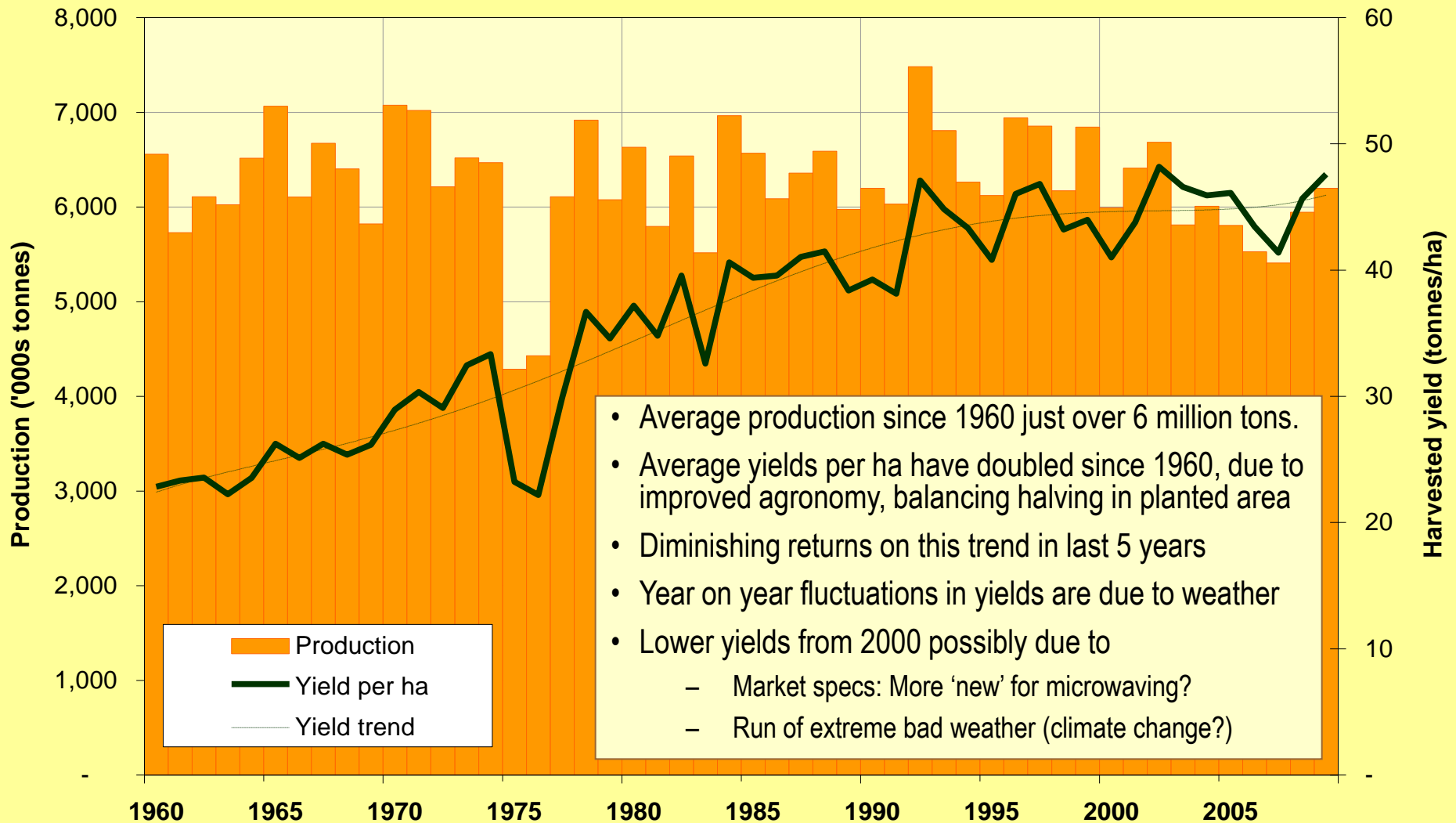
- 37% of area grown for pre-pack, 26% for processing, 20% for fresh bags and chipping, 13% for seed and 4% unknown.
- In the processing sector, 92% are grown on contract.
- Scotland grows 79% of GB seed. 42% of plantings in Scotland are for seed.

Areas and grower numbers 1960-2009

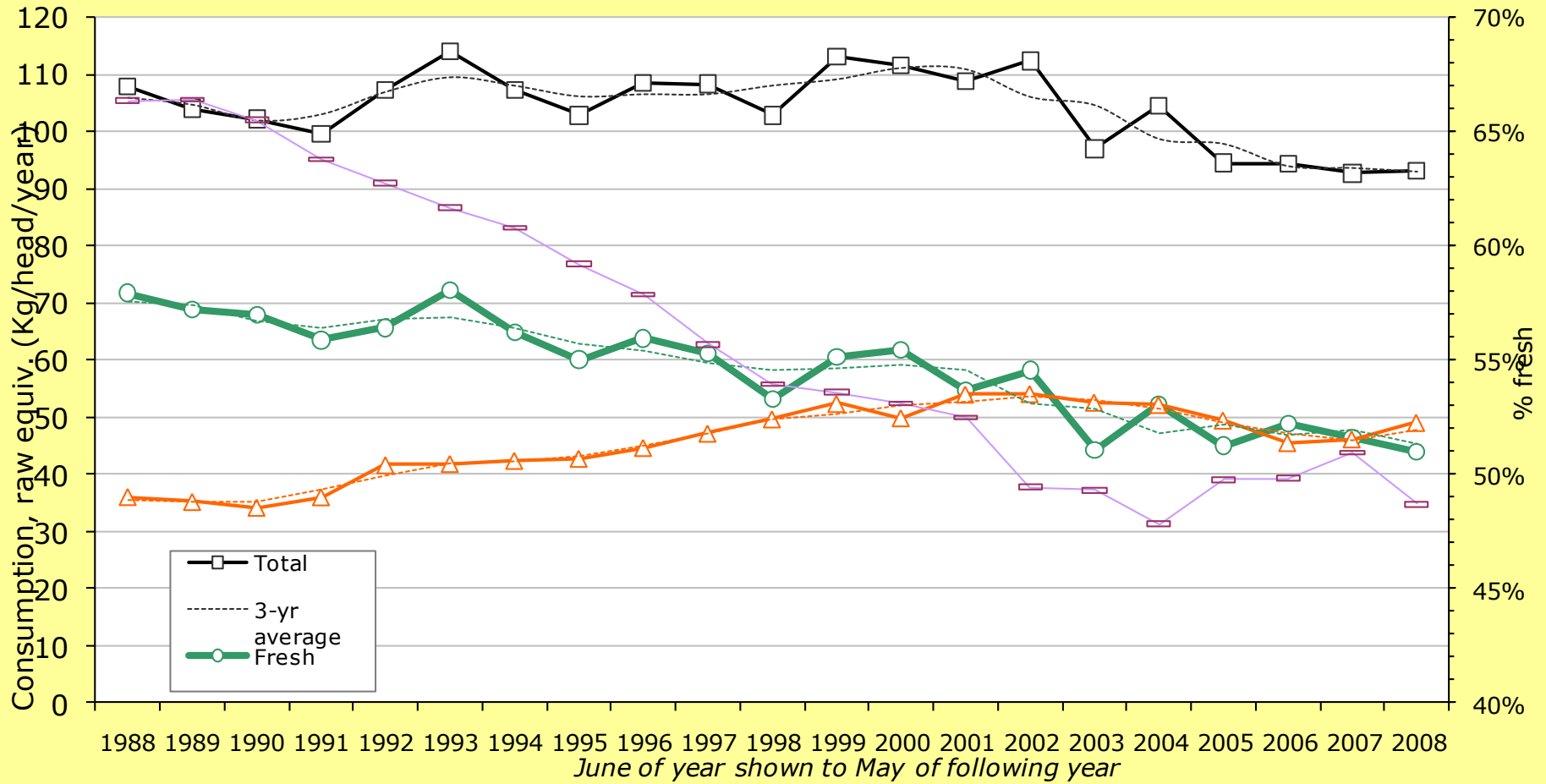
- Since 1960, There has been a 53% drop in planted area (280,000 to 130,000 ha)
- The number of growers has dropped by 97% over the same period, and is now 2575.
- Since 2003, areas have been steady, but grower numbers continue to decline



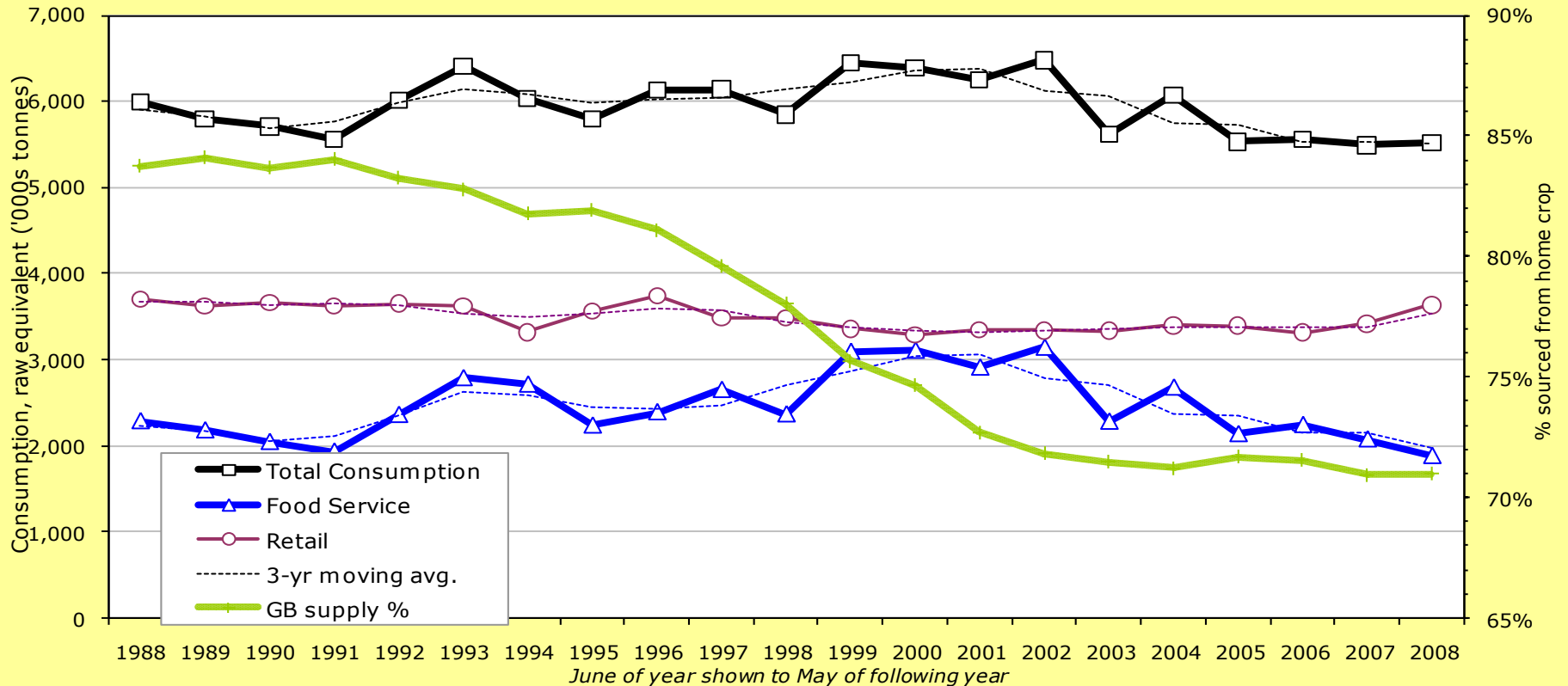
Production and yield 1960-2007



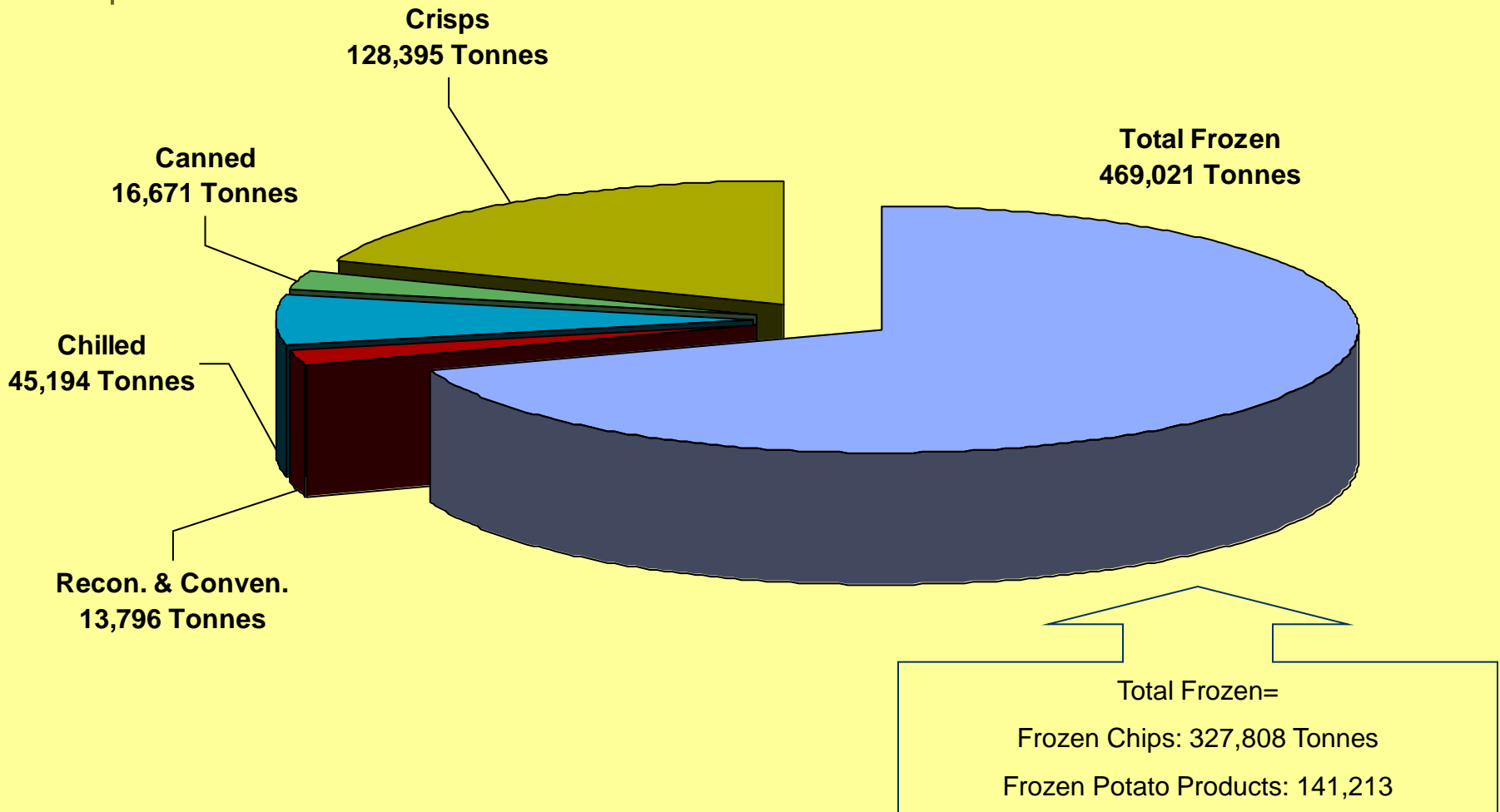
Per capita consumption in GB 1988-2008



Retail and Food Service Consumption in GB 1988-2008



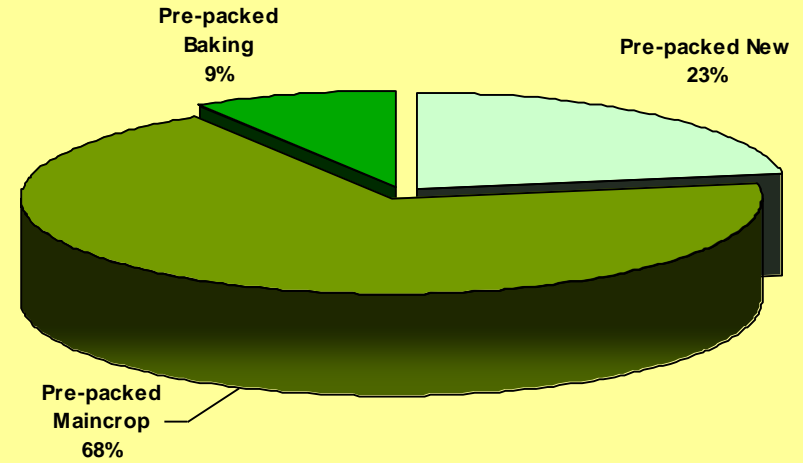
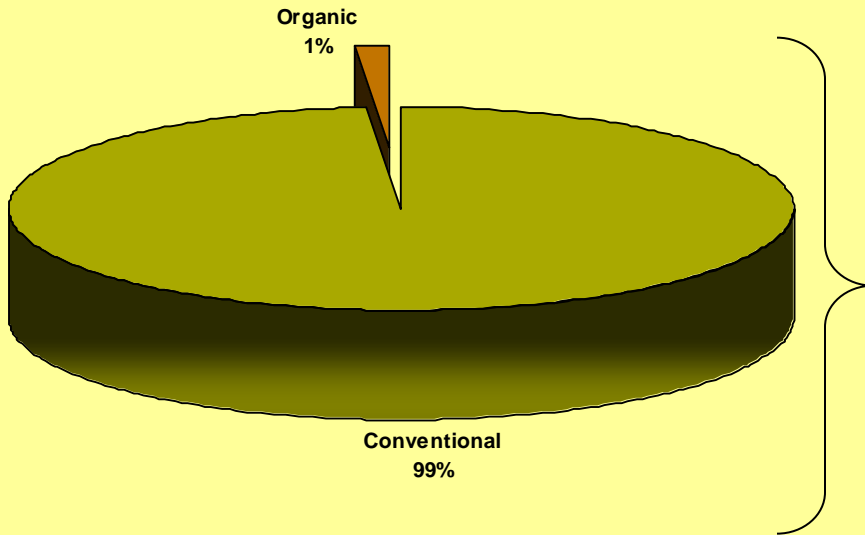
Potato Products volume



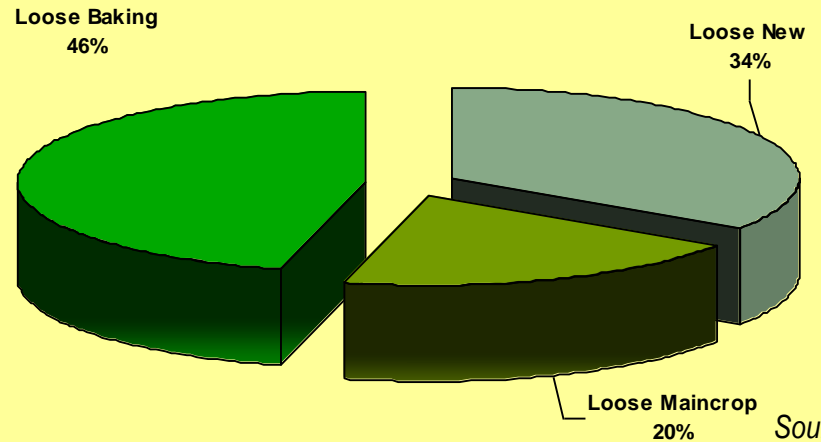
Fresh Potatoes – 52 w/e 21st Mar 2010

Total Pre-pack: 1,564,687 Tonnes

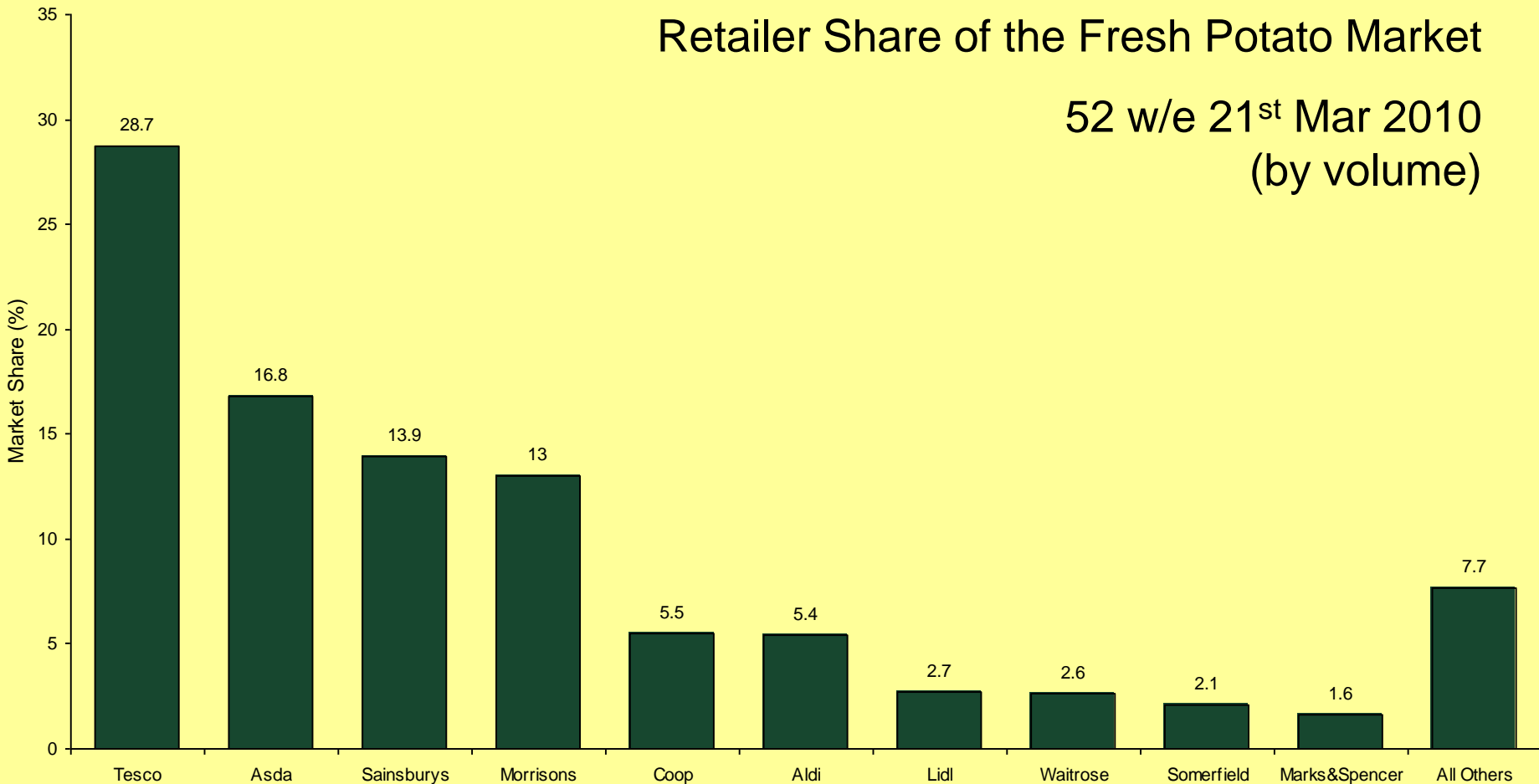
Total Fresh Potatoes:
1,681,217 Tonnes



Total Loose: 116,531 Tonnes



Retail Share of Fresh Potato Market

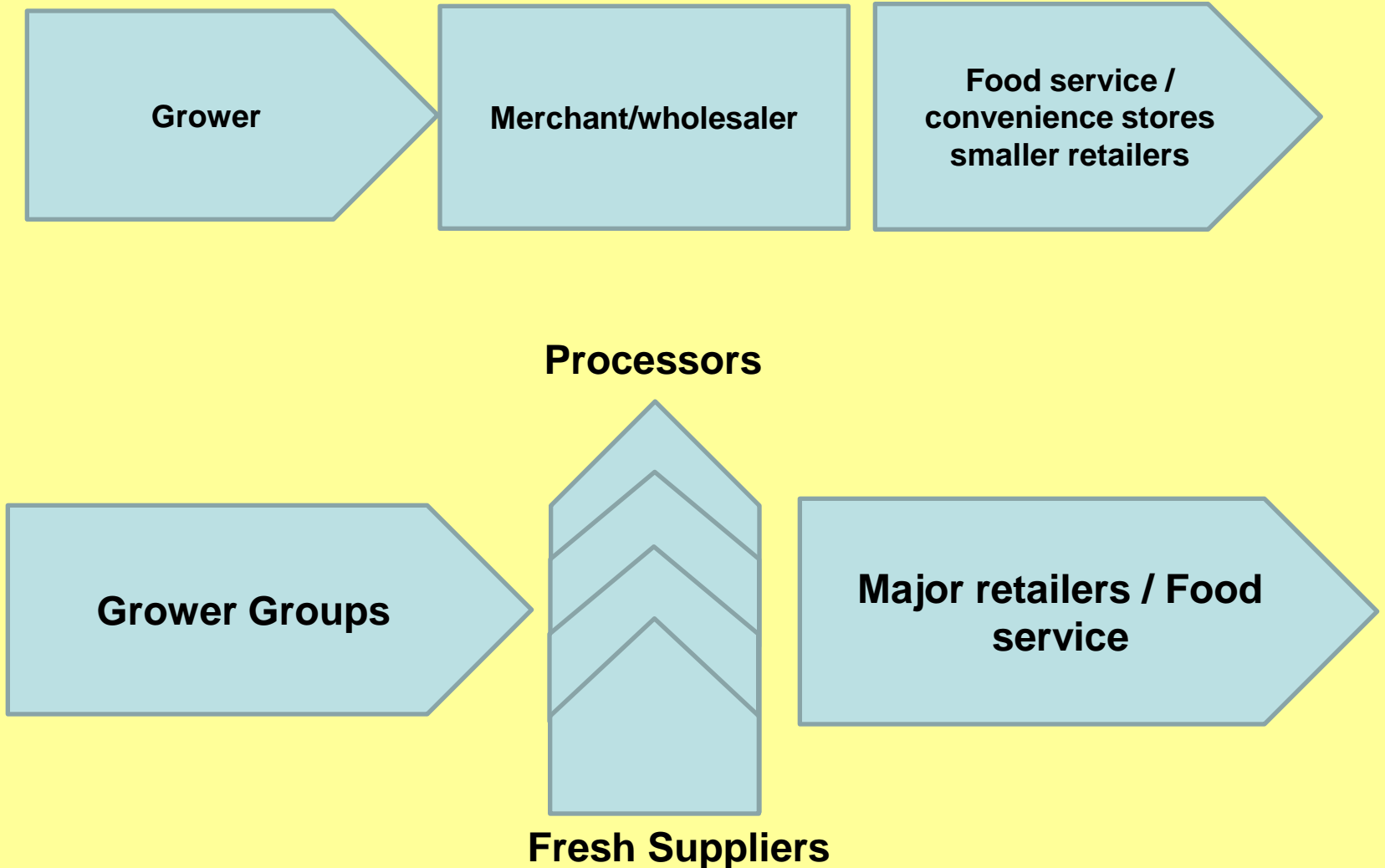




Changes that benefit a supply chain

- UK to European market
- Passionate to professional
OR Processor/Fresh supplier and Grower relationships
- BOG OFF to full marketing
- Rationalisation
- Grower Body (PMB) to industry Organisation (PCL)

GB Supply Chain - MAJOR Routes





Potato Council Limited

Aims

- Increase competitiveness of levy payers
- Sustain demand for potatoes grown by our levy payers

Levy Payers

- 2721 Growers pay £40.17 per hectare - yielding approx £5M
- 403 Purchasers pay 17.51p per tonne - yielding approx £1.1M



Potato Council Limited

Major activities

- Research and Development/SBEU £1.701M
- Marketing £1.308M
- Knowledge Transfer/Market Information £0.503M
- Seed and Seed Export £0.154M
- AHDB generic cross sector projects

Communication

- Open meetings – two way communication
- Committees formed from relevant industry specialists involved in strategy/tactics
- Board members meet levy payers to explain policy/sounding board for staff
- Events e.g. Harrogate 2009, Potatoes in Practice, Regional Potato Days



Challenges now

- Economic Sustainability and investment
- Recruitment and training



Opportunities for Innovation

Biotechnology

- Plant breeding
- Pest control

Regulation

- Pesticides
- Water
- Carbon
- Acrylamide



Future Challenges

Government Strategy for land use

- Climate change
- Population growth
- Demographic shifts
- Building requirements
- Public recreation needs
- Environmental pressures
- Food security