



*More than just Potatoes*



19<sup>TH</sup> TRIENNIAL CONFERENCE  
**EAPR2014**  
*Brussels 6>11 JULY*





**AIIPA**  
associazione italiana  
industrie prodotti alimentari

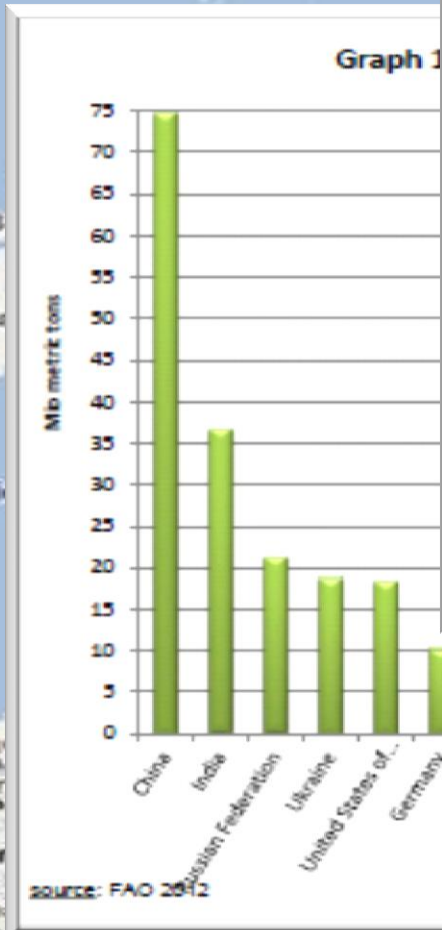
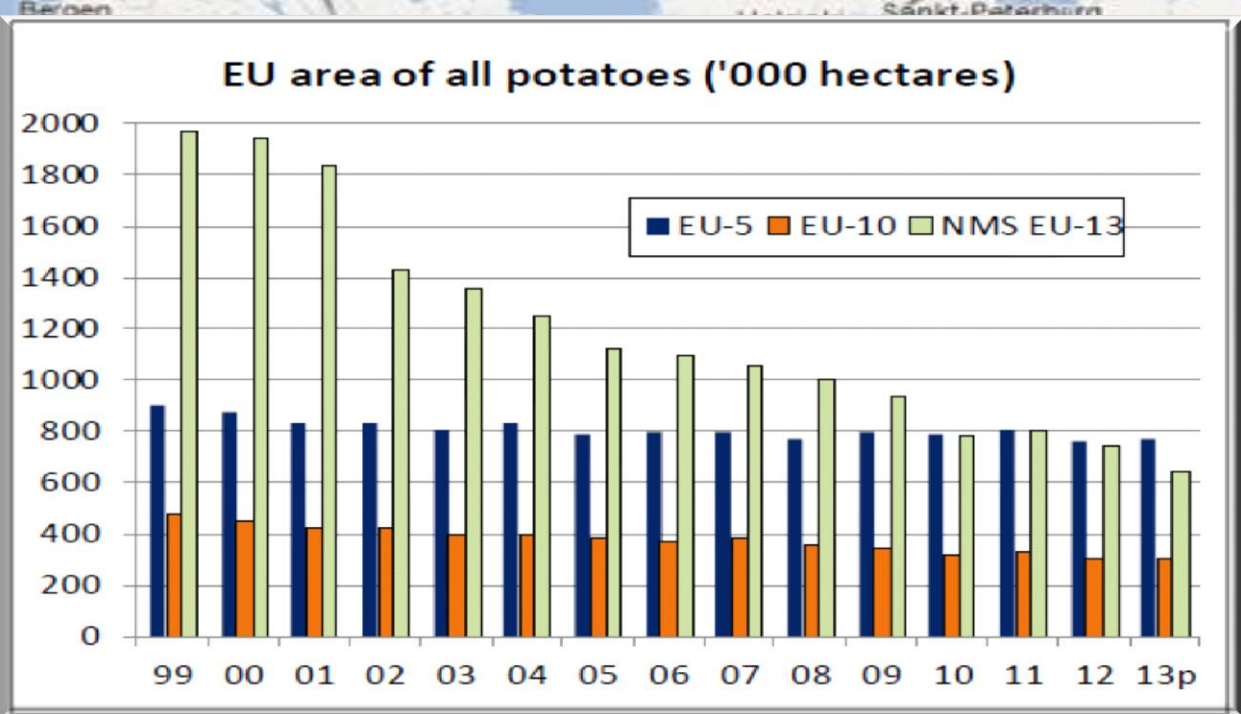


Bundesverband der obst-, gemüse- und  
kartoffelverarbeitenden Industrie e. V.

German Association of the Fruit,  
Vegetable and Potato Processing Industry









### EU-28 exports of fries and other HS 200410 products (tonnes)

A. Tonnes	April:				May-April:			
	2014	% ch'ge	2013	2012	2013/14	% ch'ge	2012/13	2011/12
Total	96651	+11.4	86747	78282	1012525	+3.5	978082	817709
Saudi Arabia	17242	+31.9	13069	13140	152974	+11.7	136991	126430
Brazil	11791	-11.9	13391	8129	152708	+8.5	140719	118642
Russia	10101	+20.2	8405	5954	100437	+17.3	85631	73494
Chile	5235	+30.3	4019	3128	60299	+29.1	46711	31910
UAE	4522	+54.9	2920	2754	43031	+29.1	33329	30626
Australia	3063	-3.8	3184	4882	32716	-31.3	47590	50951
Malaysia	2545	+1.6	2506	2778	28078	-2.1	28686	25882
Japan	1755	-23.7	2301	2038	26544	+7.8	24612	15467
Kuwait	3321	+19.6	2776	2134	24644	+3.9	23714	21137
Jordan	1774	+8.6	1633	944	23310	+68.9	13799	9157
Thailand	1735	+43.5	1209	1612	20974	+25.2	16758	12119
Peru	1329	-18.6	1632	953	19844	+49.7	13259	7347
Ukraine	1114	-19.7	1387	1148	14663	+8.5	13515	13216
South Africa	3369	+14.9	2931	1929	13371	-61.8	34968	20849





### US exports of fries and other HS 200410 products (tonnes, US\$ million, US\$/tonne)

A. Tonnes	April:				May-Apr:			
	2014	% ch'ge	2013	2012	2013/14	% ch'ge	2012/13	2011/12
					953717	+3.1	925202	869134

### Canadian exports of fries and other HS 200410 products (tonnes, Ca\$ million, Ca\$/tonne)

A. Tonnes	April:				May-April:				2013/14	% ch'ge	2012/13	2011/12
	2014	% ch'ge	2013	2012	2013/14	% ch'ge	2012/13	2011/12				
<b>Total</b>	<b>82366</b>	<b>+1.4</b>	<b>81242</b>	<b>73144</b>	<b>918230</b>	<b>+3.5</b>	<b>887112</b>	<b>907304</b>	<b>953717</b>	<b>+3.1</b>	<b>925202</b>	<b>869134</b>
United States	70570	+4.4	67600	60240	781938	+7.5	727187	734310	262783	-3.2	271474	273917
Japan	1031	-52.8	2183	2762	40662	+21.8	33373	34967	114093	+11.7	102109	76552
Bahamas	283	-27.4	390	466	11150	+69.7	6572	4786	91593	-10.6	102468	87287
China	3141	+299.6	786	193	10596	+23.7	8564	4487	83110	+12.3	73990	56985
Indonesia	1321	-4.7	1386	132	9498	-7.8	10301	6523	46750	-21.7	59692	61620
Costa Rica	478	-58.3	1146	717	8057	-13.9	9353	10362	44882	+24.2	36130	29548
Aruba	41	-94.2	710	16	8013	+93.5	4141	429	42401	-1.4	42995	41204
Mexico	1623	-42.4	2818	3255	7697	-75.9	31950	42861	39516	+11.1	35558	33882
Guatemala			1552			+20.5	1107	1162	28340	+1.7	27854	28069
Nicaragua									27885	0	27892	29026
									23568	+15.5	20407	20322
									17207	+11.7	15403	33104
									17059	+30.8	13038	13658
									14625	+30.8	11184	12322
									14291	-7.3	15417	14143





**EU-5 area, yield and production of ware potatoes, \* 2009 to provisional/forecast 2014**

	2014f	% ch'ge	2013p	% ch'ge	2012	2011	2010	2009
Area (hectares)	597715	+2.7	581780	+3.3	563237	598909	582440	583320
Yield (tonnes/ha)	45.25	+3.0	43.92	+3.6	42.37	47.56	43.81	45.91
Harvest ('000 tonnes)	<b>27043.9</b>	+5.8	25549.4	+7.1	23864.4	28486.4	25514.2	26778.3

**Note:** WPM forecasts for 2014 in italics. \*Ware and seed for Germany and UK; France excludes earlyies. **Sources:** National statistical authorities; AMI.

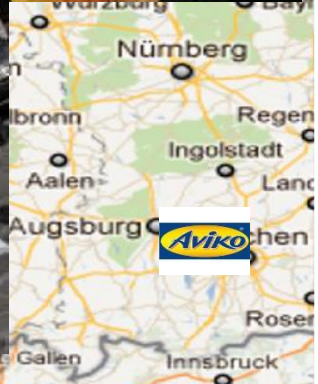
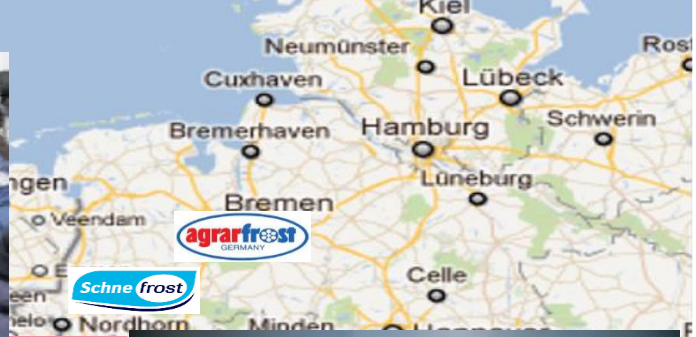


USA					
cropyear	2009	2010	2011	2012	2013
Production (ton)	19.622.451	18.337.515	19.488.460	20.990.713	19.946.316
Harvested area (ha)	422.492	407.923	435.846	458.064	426.053
Average yield (ton/ha)	46,4	44,9	44,7	45,8	46,9
Canada					
cropyear	2009	2010	2011	2012	2013
Production (ton)	4.574.887	4.406.786	4.189.923	4.569.535	4.660.027
Harvested area (ha)	145.565	139.212	141.154	148.564	142.183
Average yield (ton/ha)	31,4	31,7	29,7	30,8	32,8

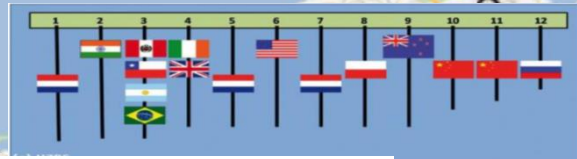




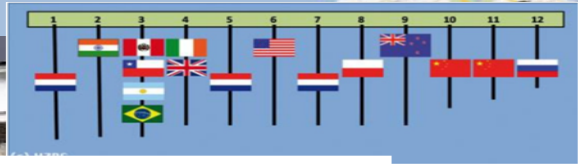












**WORLD POTATO MARKETS**





# Cluster

## Raw material Competition

## related firms institutions & authorities

Operational  
Effectiveness

Strategic  
Positioning

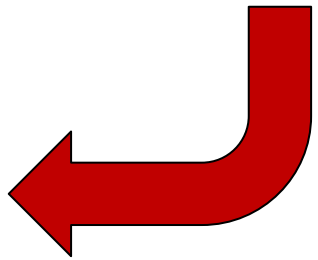
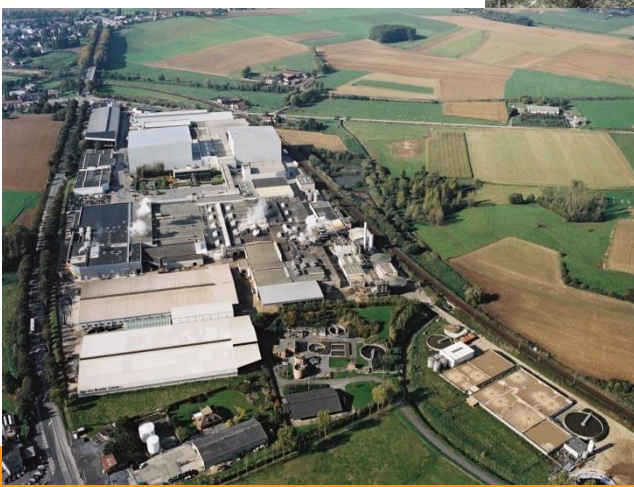
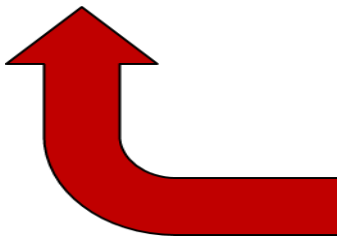
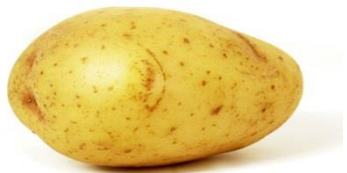
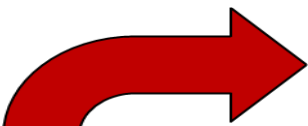
Clusters

Clusters facilitate rapid operational improvement and extending the productivity frontier

- Rapid dissemination of best practices
- Opportunities for experimentation with new activity configurations and approaches

Clusters tend to foster *strategic* competition instead of imitation and price cutting

- Operational efficiency differences within clusters are hard to sustain
- Proximity discourages imitation versus the pursuit of different strategies
- Clusters can provide a better environment in which to perceive new needs and segments
- The presence of local suppliers, related firms, and supporting institutions enables strategic differences







Earn a living without taking too much risk

Yield ton/ha & €/ha

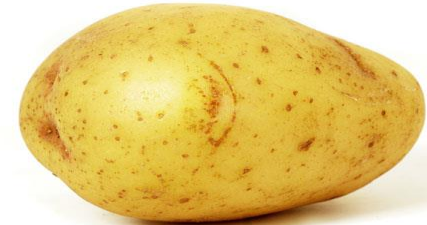
- ✓ Seed potatoes
- ✓ Workload
- ✓ Storageability
- ✓ Robustness of the crop/variety : stress – diseases

Market

- ✓ Contract & free buy
- ✓ Processing, starch, table ware, .....

Support

- ✓ Technical & operational
- ✓ Market intelligence





Supply : continuous + right quality

Storageability

Market :

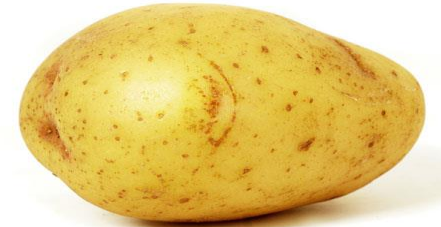
- ✓ Price
- ✓ Contract – Free buy – Surface/Volume

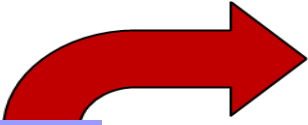
Sourcing area

Specs – Yield :

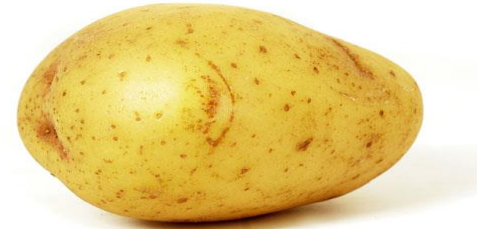
- ✓ Length/Size/Shape tuber
- ✓ Sensitivity to defects
- ✓ Dry matter
- ✓ .....

Finished product type

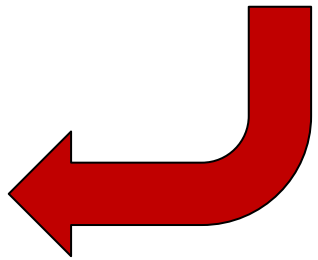
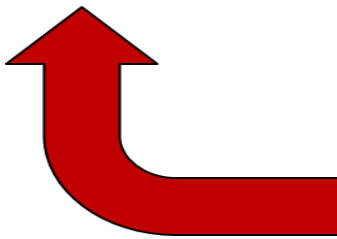
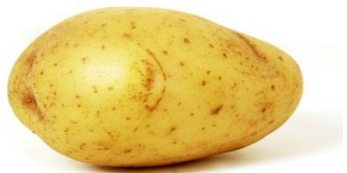
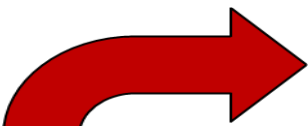


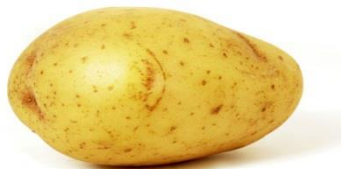
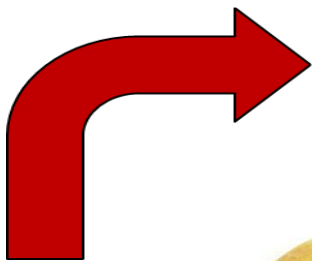


Price  
Taste – Physical aspects  
Supply  
Perceived quality  
  
Social responsibility









**Yield ton/ha & €/ha**

- ✓ Seed potatoes
- ✓ Workload
- ✓ Storageability
- ✓ Robustness of the crop/variety : stress – diseases

**Market**

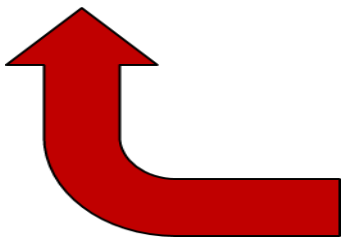
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**Support**

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- ✓ Market intelligence

**Price**  
**Taste – Physical aspects**  
**Supply**  
**Perceived quality**

**Social responsibility**



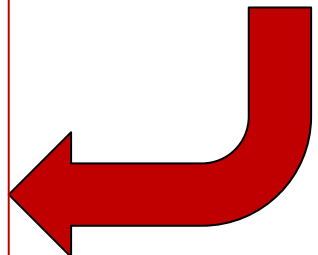
**Supply : continuous + right quality**  
**Storageability**  
**Market :**

- ✓ Price
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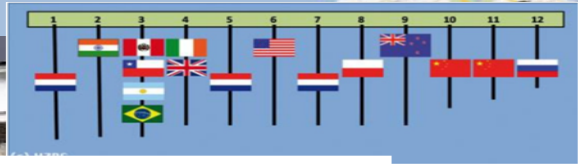
**Sourcing area**  
**Specs – Yield :**

- ✓ Length/Size/Shape tuber
- ✓ Sensitivity to defects
- ✓ Dry matter
- ✓ .....

**Finished product type**







**WORLD POTATO MARKETS**





A close-up photograph of a pair of hands, likely belonging to a farmer, holding several small, light-brown potatoes. The hands are cupped together, and the potatoes are nestled in the palms. The background is dark and textured, possibly soil or a wooden surface. The lighting is soft, highlighting the texture of the skin and the potatoes.

*More than just Potatoes*