

Potato Industry Conference

# The British Potato Market

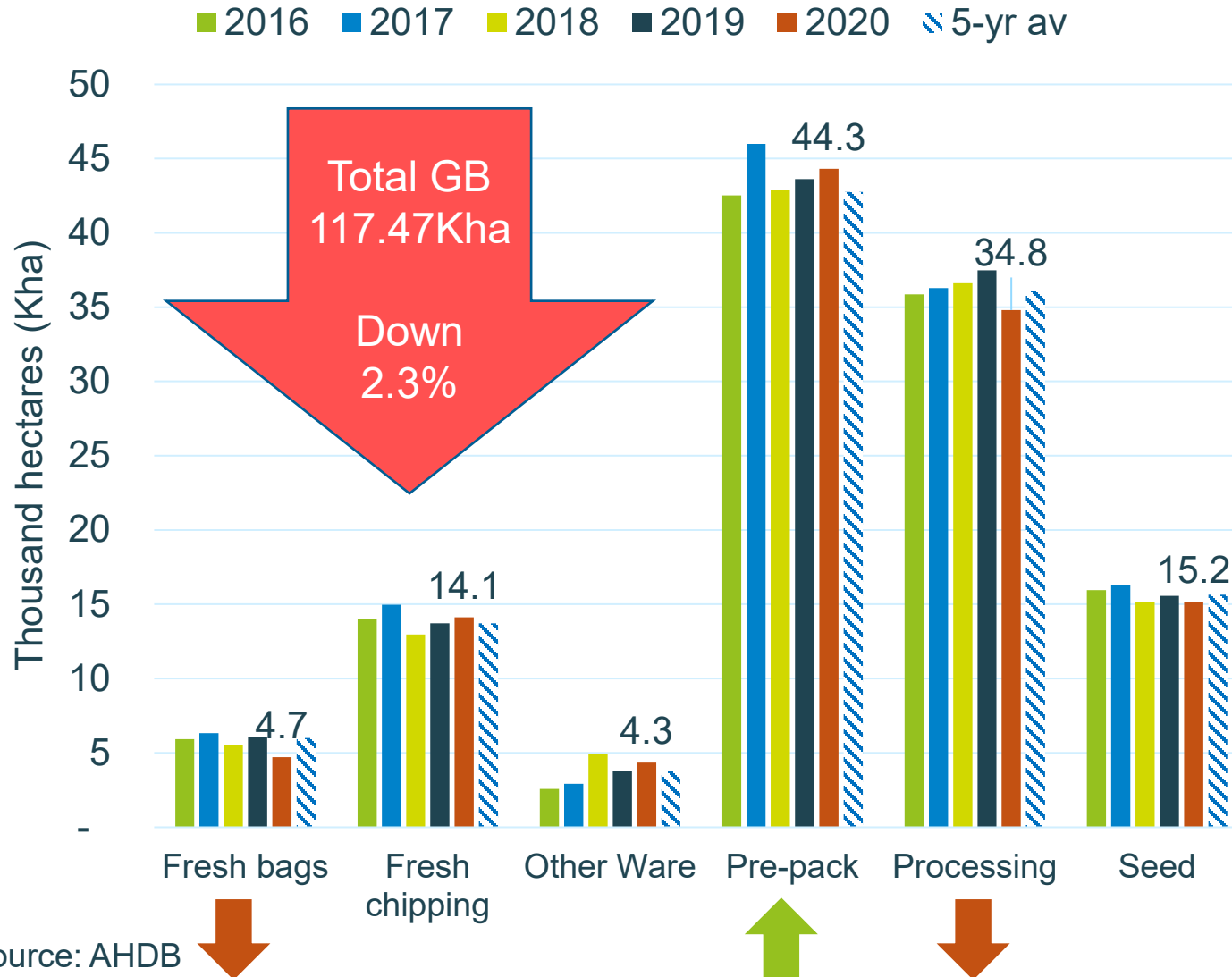
Alice Bailey – Senior Analyst (Potatoes)



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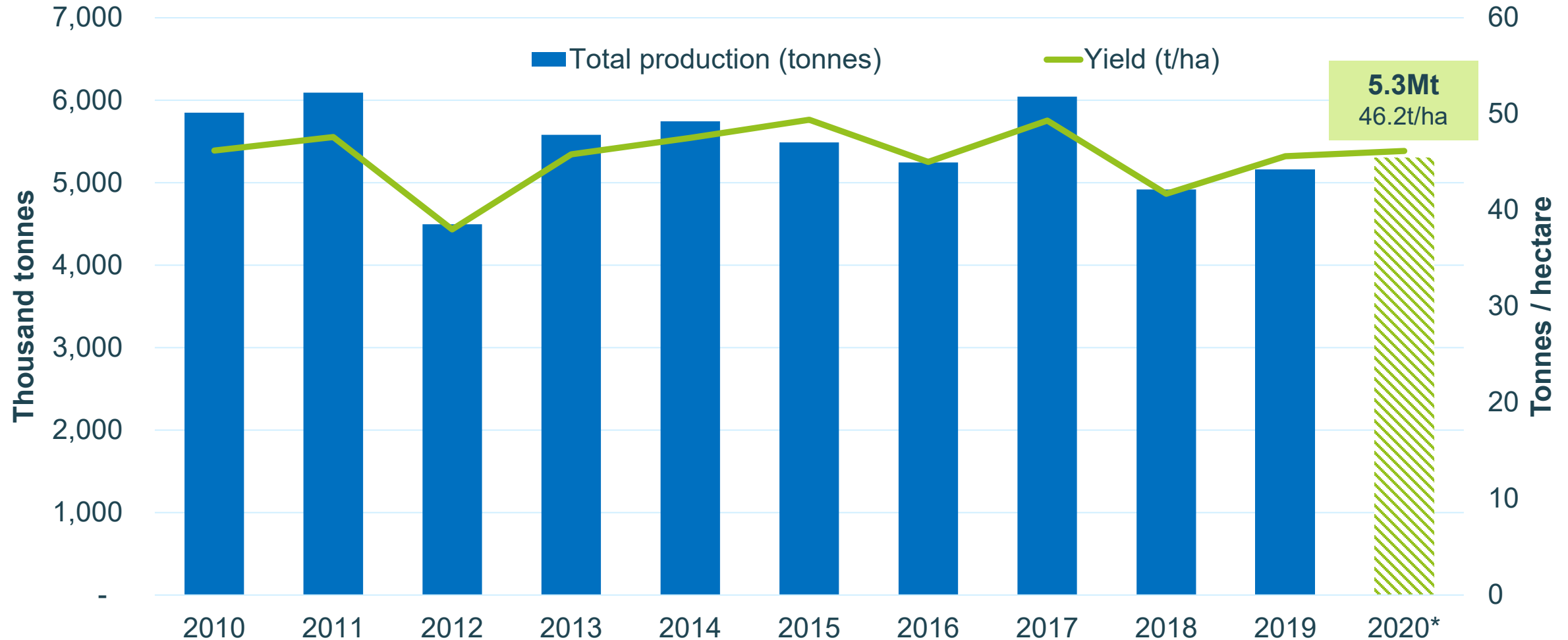
# What is making up the British potato market

# GB's 2020 planted area is down 2.3% but there are distinct sector differences

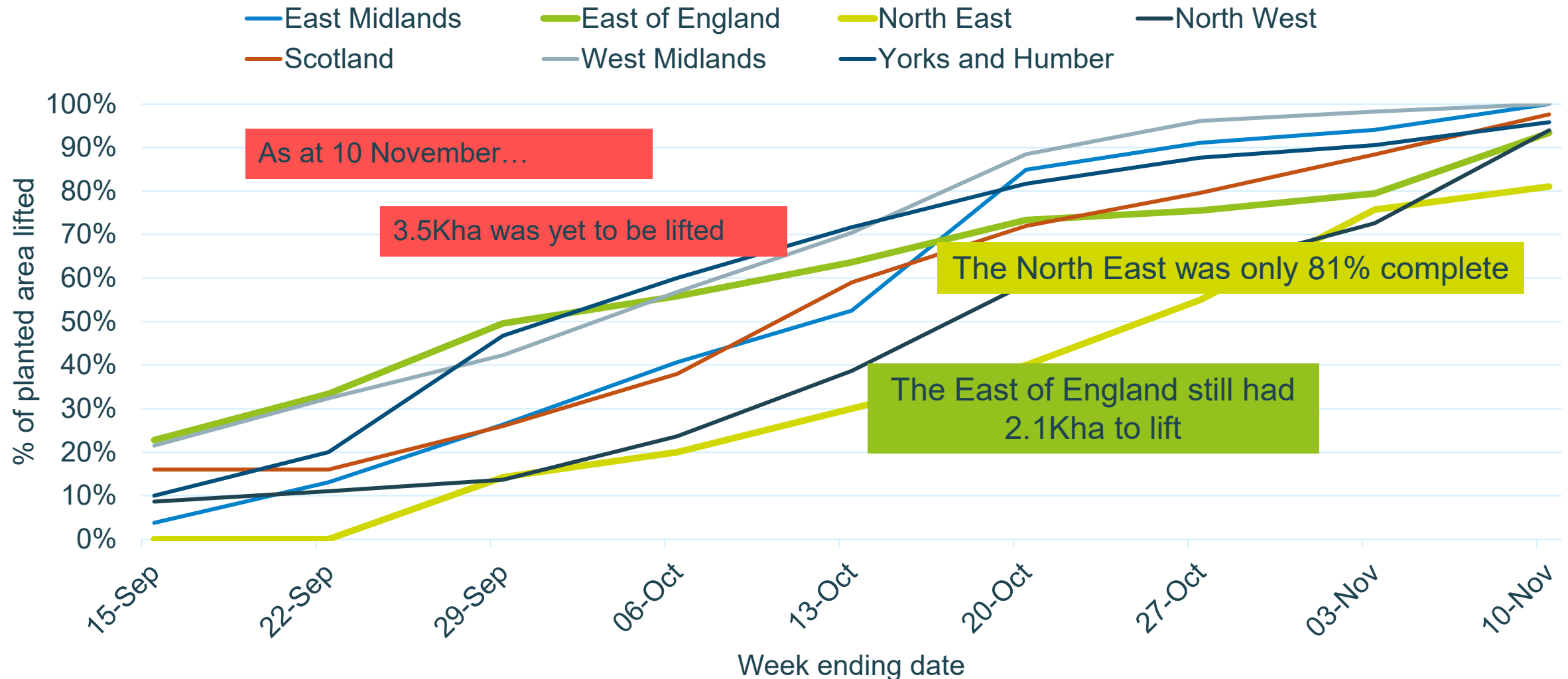


- Processing seen the greatest fall, down 2.7Kha
- Fresh bags for general ware also seen big drop of 22.8% (1.4Kha)
- Pre-pack area risen 1.6% YoY, 3.7% vs 5-yr average
  - Rise in contracted area outweighing a drop in free-buy area

# 2020 provisional production estimate shows increase on last year despite drop in planted area

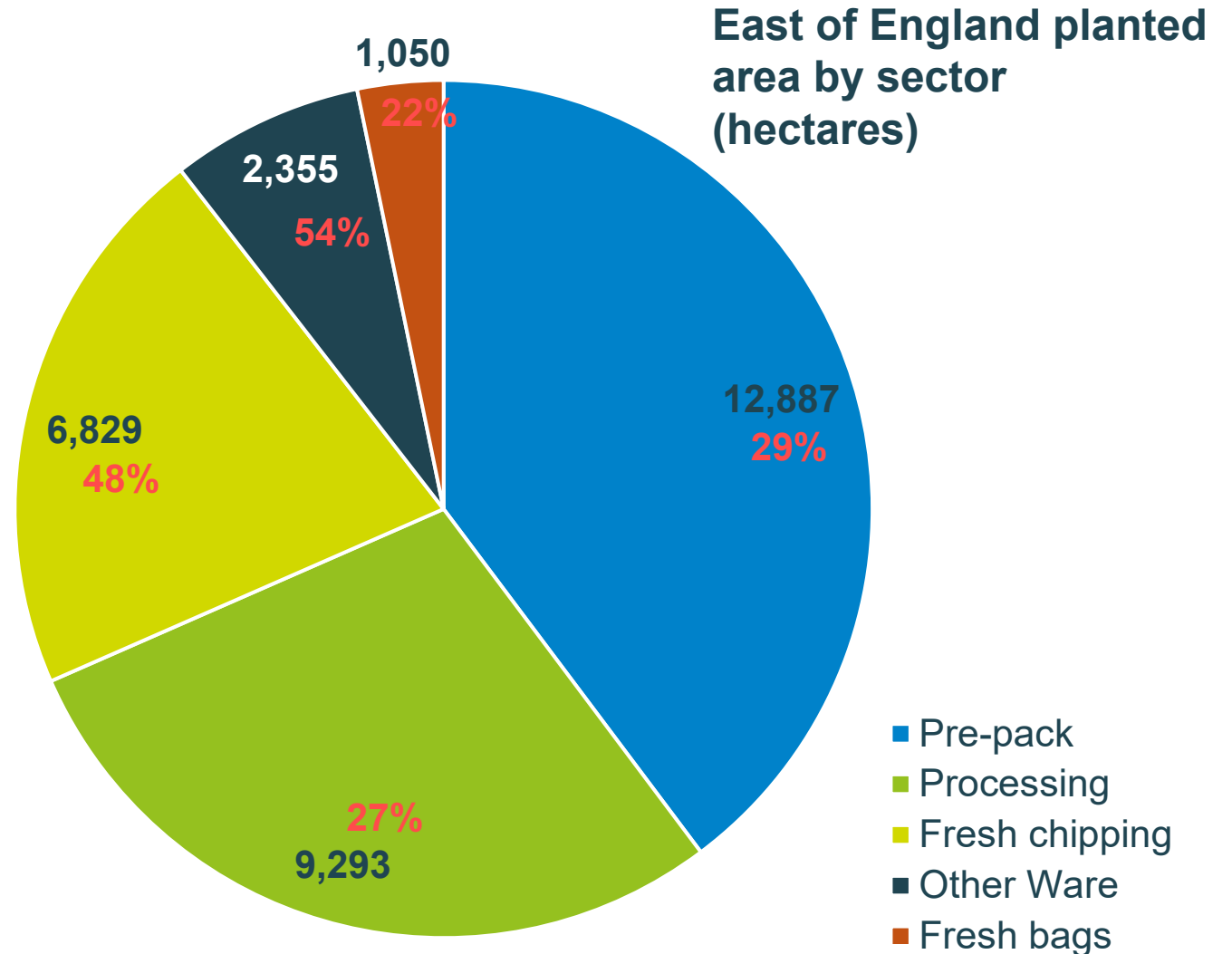


# Lifting has progressed better than last year but there are some distinct regional differences



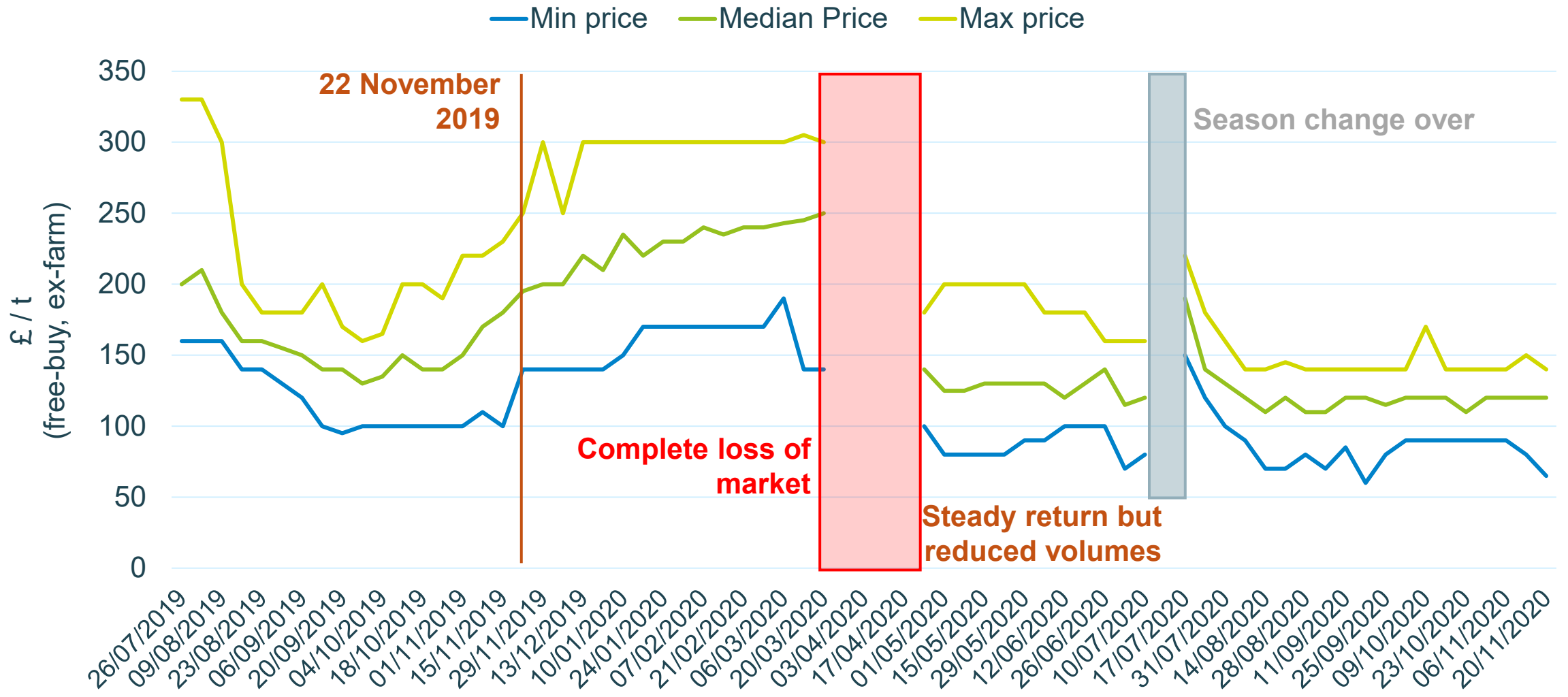
# Fresh chipping supply is potentially at risk by East of England lifting delays

- 28% of the national potato area is planted in the East of England
- 2.1Kha is c.6% of EoE's total planted area
  - c.2% of total GB planted area
- Almost 50% of the fresh chipping supply comes from the East of England
  - Quality issues could be apparent

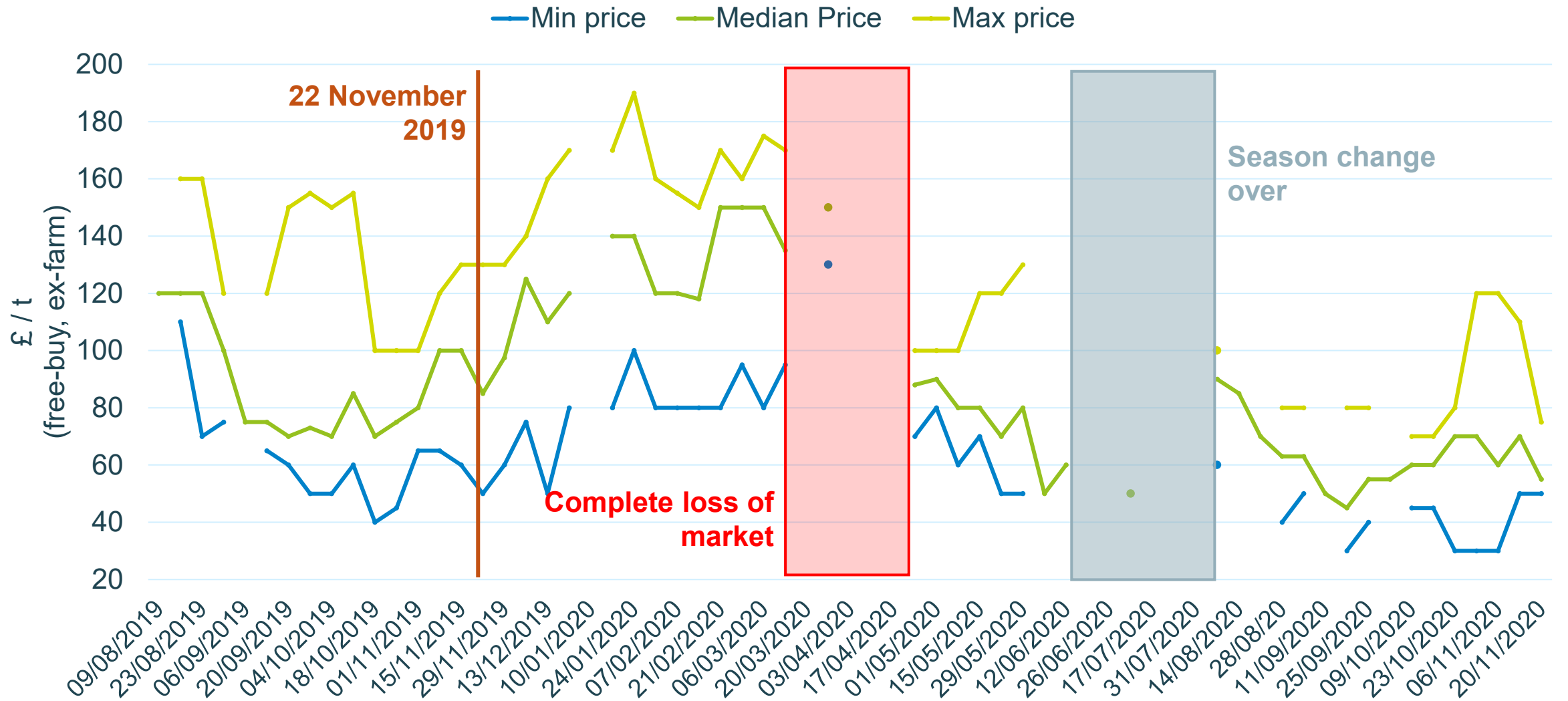


# What are the physical markets doing this season

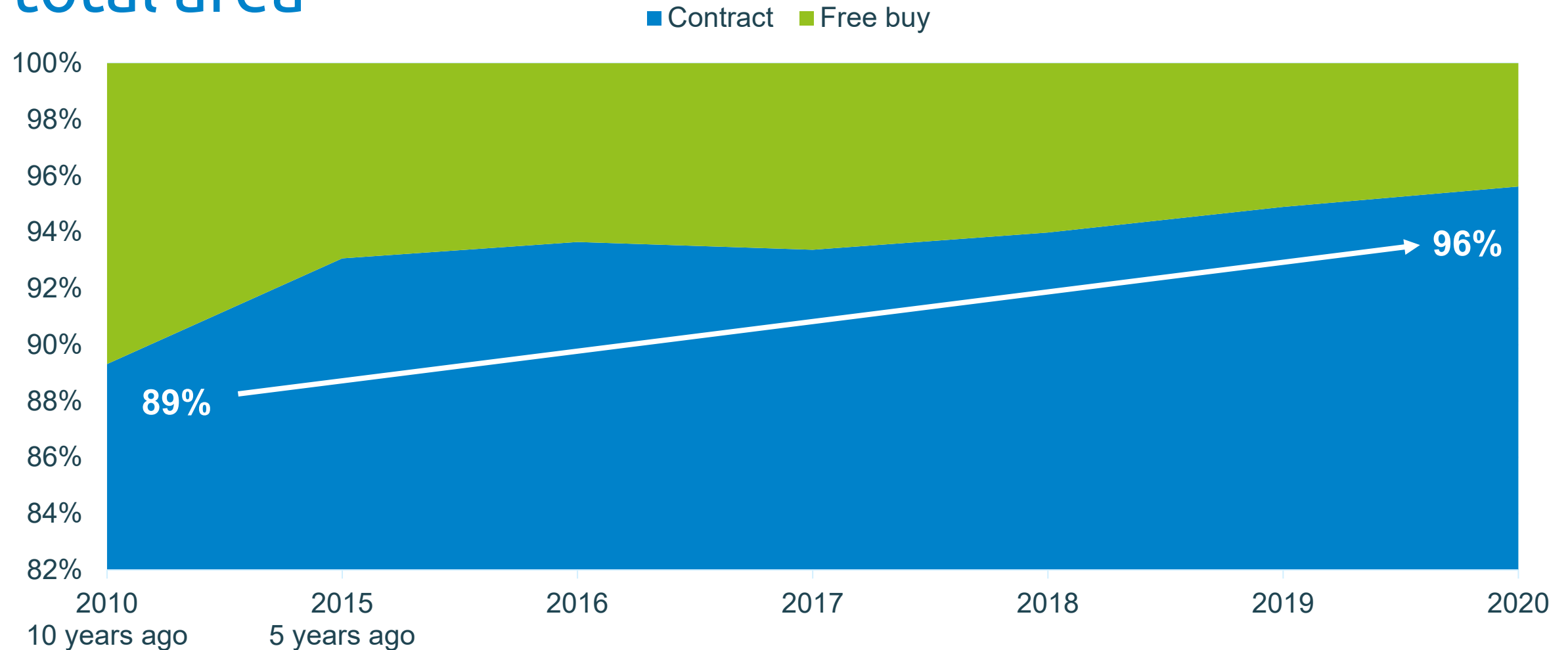
# Chipping prices are under pressure this season due struggling demand



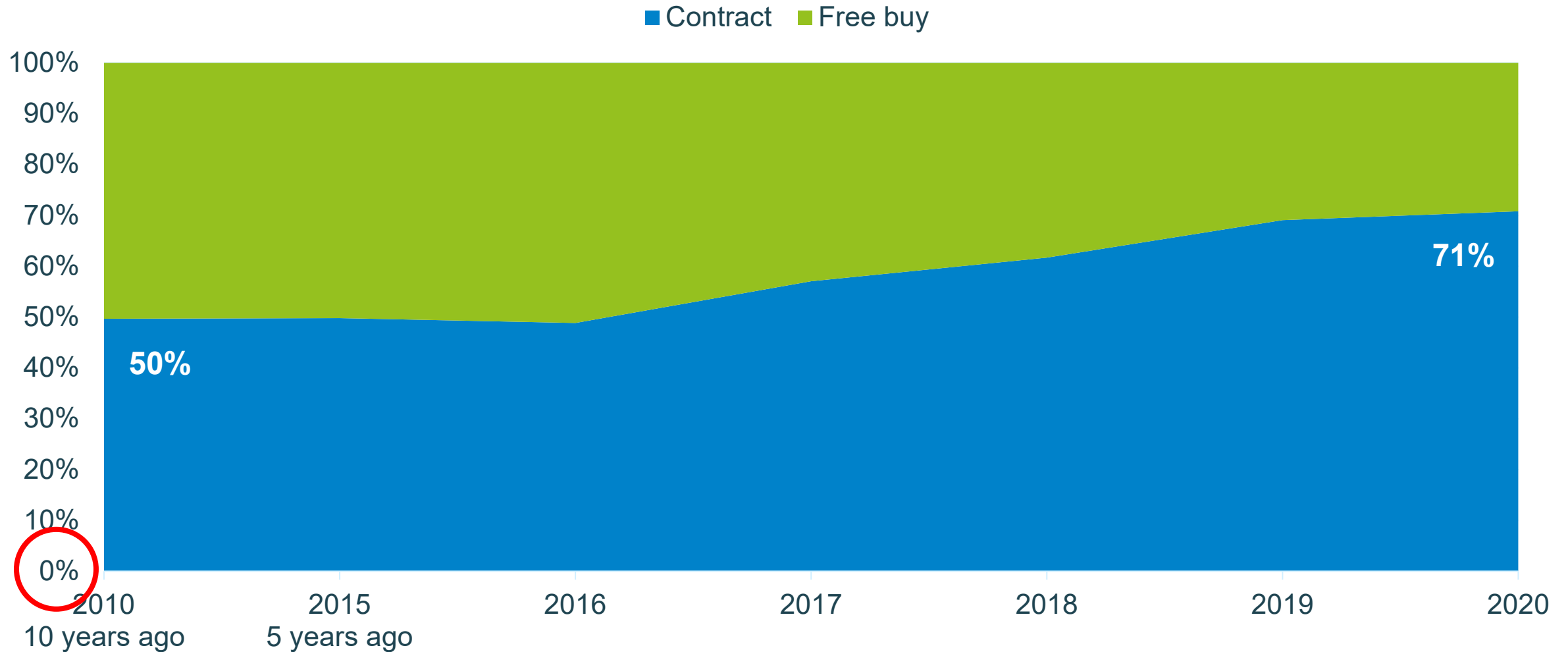
# Free-buy processing markets have been under continual pressure due to both demand and supply



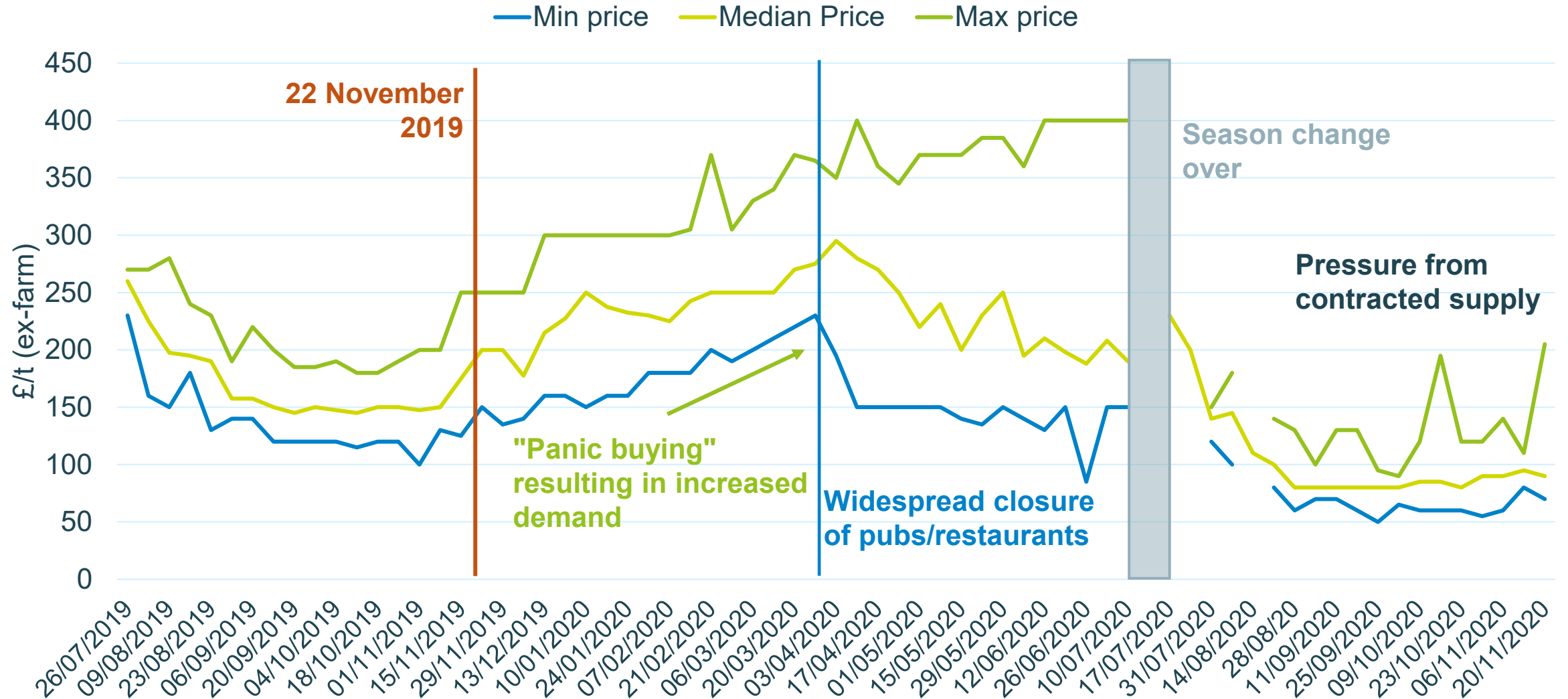
# The processing sector continues to see and increase in contracted area as a proportion of the total area



# The packing sector has an even more pronounced rise in contracted area as a proportion of total area



# As a result of increased contracted supply packing prices have been pressured



# Challenges, opportunities and information ahead

## Coronavirus

- Further restrictions across Great Britain?
- Continued changes to consumer demands
- Retail demand vs foodservice

## Brexit

- Changes in export supply due to market access
- Opportunity to displace some imports with domestic supply

## Information

- Free-buy price reporting
- Further breakdown of production
- Stocks levels throughout the season

# Contact me

[Alice.Bailey@ahdb.org.uk](mailto:Alice.Bailey@ahdb.org.uk)

A vibrant landscape of a green field at sunset. A path leads from the foreground towards the horizon where the sun is setting, creating a warm glow. The sky is filled with colorful clouds. In the foreground, there are decorative white wavy lines.

**‘Inspiring our farmers, growers  
and industry to succeed in a  
rapidly changing world’**

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