



USDA Foreign Agricultural Service

# GAIN Report

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## Netherlands

### Frozen Potato Products

#### Annual

#### 2006

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**Report Highlights:**

This year's harvest is expected to be lower and of poorer quality than preceding years.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Annual Report  
The Hague [NL1]  
[NL]

FAS/The Hague reports annually on the Dutch frozen potato products market. This GAIN report will focus on this year's harvest since industry experts expect it to be lower and of poorer quality than preceding years. At the time of writing this report, an estimated 45% of all potatoes have been harvested. More accurate figures on yield, production and trade will be reported when available.

Quite similar to other main potato producing areas in North West Europe, industry sources are expecting a poor quality for this year's potato harvest in the Benelux. The main reason being the unfavorable weather conditions during the months of July and August of this year. July was a dry month and demonstrated high temperatures. As a result the temperature of the soil went up and created the perfect environment for the primary tubers to sprout. The following month was extremely wet and relatively cold which initiated the production of secondary tubers on the new sprouts.

The secondary tubers start withdrawing starch from the primary tubers. When this process starts, the apparent weight (AW) of the primary tubers goes down while the AW of the secondary tubers goes up. When the AW gets below 280-300 grams, the primary tubers can get waxy and are therefore less likely to be fit for human consumption. The requirement on apparent weight for the fries industry is even more stringent (360 grams).

Industry contacts indicate that a mere 45% of all potato acreage is harvested. Taken into consideration that harvest conditions have been quite favorable in September, farmers must have decided to postpone harvesting. They are most likely focusing on harvesting good quality secondary tubers rather than primary tubers.

Main user of potatoes for consumption in the Netherlands is the processing industry. Almost 85% of finished processed products are targeted for export (mainly to the UK, France and Germany). It's too early yet, to detail what the effects can be for the processing industry over the coming twelve months as a result of the expected quality and quantity of this year's harvest. Factors that have to be taken into consideration are 1) the potato harvest in neighboring countries like France and Germany, 2) further actions taken by the processors on AW requirements (the industry temporarily lowered the AW requirement to 345 grams) and 3) the possibilities of storing this year's potatoes.

It is expected that the majority of the harvest will have suffered from the effects of the unfavorable weather circumstances this summer. Based on the already harvested acreage, the AW is expected to be lower this year compared to previous years. More accurate figures on this year's quality are expected early December of this year and a revised report will be sent out shortly afterwards.