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## Belgium-Luxembourg

## Frozen Potato Products

## Benelux

## 2008

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**Report Highlights:**

Overall production of potatoes in North Europe for 2008 has dropped mainly due to a lower harvested area. Production in the Netherlands is stable while production in Belgium is expected to decline by 8%.

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

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## Europe

Northern European production of potatoes<sup>1</sup> for 2008 has dropped according to the Northwest European Potato Growers. In the 5 main producing countries (Germany, the UK, France, the Netherlands and Belgium), total area was estimated to have fallen by 2.8%, yields down 0.6% and total production weaker by 3.4%.

In the EU-27 the Potato Council estimates total potato production to be 61.1 million MT for 2008. This is 3.0 million MT less than in 2007, mainly due to a decrease of 100,000 hectares in planted area (mostly in East European Countries and in particular Poland). There are higher yields in the northern parts of the EU, but somewhat lower yields in most of the other EU countries. In the last few years potato growing in Poland has steadily declined. This year, Poland's potato harvest will be 12.9% less than in 2007 while the average yield this year is 18.9 MT per hectare compared with 21.5 MT per hectare in 2007.

## Netherlands

Total production of potatoes for 2008 is estimated to be 3.6 million MT, slightly up (15,739 MT) compared to last year. Of the total production, generally speaking, almost a third is destined for the fresh market and the remaining finds its way to the processing industry. More detailed information on the 2007 harvest and 2008 production figures can be found in respectively GAIN report NL8002 and Appendix I of this report.

In Marketing Year<sup>2</sup> 2007/2008 (MY 07/08), over 2.1 million MT was used for further processing. In addition, almost 1.2 million MT potatoes were imported, from mainly neighboring countries, to fully utilize processing capacity of potato processors.

Table 1: Output of Potato Products, 1,000 MT

	MY 04/05	MY 05/06	MY 06/07	MY 07/08	Jul 07 – Aug 07	Jul 08 – Aug 08
Pre-fried products	1,371	1,380	1,275	1,356	177.5	209.3
Other products	353	346	371	404	58.5	62.6
Total potato products	1,724	1,726	1,646	1,760	236.0	271.9

Source: [www.productschapakkerbouw.nl](http://www.productschapakkerbouw.nl)

The above table shows that the MY 07/08 output of potato products is back to pre-MY 06/07 levels. Since the 2008 harvest is expected to be back around 6.9 million MT, FAS/The Hague expects the output of potato products for MY 08/09 to be similar to last year's.

## Belgium

According to Belgapom, potatoes production for 2008 is estimated to be almost 2.9 million MT. The lower production in 2008 is the result of mainly a lower harvested area, which dropped by almost 6% compared to last year. The average yield in 2008 is estimated to be around 47 MT per hectare. Potato plants in Belgium processed in 2007 almost 2.5 million MT potatoes. In the same year the output of pre-fried potato products totaled 771 thousand MT (product weight).

The pre-fried potato products industry in both the Netherlands and Belgium is strongly focused on export markets. More detailed information on the Belgian production figures can be found in Appendix II of this report.

<sup>1</sup> Potatoes for fresh and processing use

<sup>2</sup> Marketing years run from July until June

Table 2: Output of Potato Products, 1,000 MT

	CY 04	CY 05	CY 06	CY 07	CY 08*
Pre-fried products	596	620	651	771	800
Other products	427	459	497	497	495
Total potato products	1,023	1,079	1,148	1,268	1,295

Source: Belgapom, \*FAS/The Hague estimates

Previous reports from FAS/The Hague on this subject can be found on <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>. Below you will find a selection of these reports from FAS/The Hague.

Report Number	Report Title	Date Released
NL8002	Frozen Potato Products	01/23/2008
NL6045	Frozen Potato Products	12/05/2006
NL6038	Frozen Potato Products	10/10/2006
NL5031	Frozen Potato Products	10/03/2005

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## Appendix I

	Year	Harvested Acreage (Ha)	Yield Kg/Ha	Total Production/MT
Total Potatoes (Seed, Ware <sup>3</sup> and Starch)	2001	161,665	43,400	7,015,253
	2002	164,308	44,800	7,362,738
	2003	158,518	40,800	6,468,762
	2004	162,821	46,000	7,487,652
	2005	155,558	43,600	6,776,860
	2006	155,826	40,042	6,239,648
	2007*	156,898	43,800	6,872,248
	2008**	151,612	45,269	6,863,293
Seed Potatoes (sandy and peat soil)	2001	5,974	33,900	202,659
	2002	4,809	30,400	146,204
	2003	3,855	33,000	127,236
	2004	3,594	31,000	111,262
	2005	3,516	33,500	117,839
	2006	3,171	33,972	107,725
	2007*	3,270	32,100	104,967
	2008**	3,101	31,236	96,863
Seed Potatoes (clay)	2001	32,772	35,800	1,173,953
	2002	33,939	35,000	1,188,754
	2003	35,420	36,100	1,279,786
	2004	35,699	36,500	1,301,236
	2005	35,720	33,400	1,191,759
	2006	33,962	35,029	1,189,639
	2007*	33,395	34,300	1,145,449
	2008**	32,367	36,745	1,189,325
Ware Potatoes (sandy and peat soil)	2001	20,752	50,400	1,046,493
	2002	26,319	50,800	1,336,877
	2003	21,964	45,900	1,007,499
	2004	22,042	53,600	1,181,821
	2005	19,227	49,500	951,834
	2006	18,290	46,437	849,328
	2007*	20,384	52,000	1,059,968
	2008**	19,332	50,600	978,199
Ware Potatoes (clay)	2001	54,298	46,900	2,545,292
	2002	50,643	51,500	2,610,554
	2003	48,485	46,000	2,232,445
	2004	50,275	52,200	2,623,078
	2005	46,406	48,700	2,261,184
	2006	50,818	43,835	2,227,616
	2007*	51,860	49,100	2,546,326
	2008**	50,263	52,600	2,643,834
Starch Potatoes (all)	2001	47,869	42,800	2,046,856
	2002	48,598	42,800	2,080,359
	2003	48,794	37,300	1,821,796
	2004	51,211	44,300	2,270,255
	2005	50,688	44,500	2,254,244
	2006	49,585	37,619	1,865,340
	2007*	47,989	42,000	2,015,538
	2008**	46,549	42,000	1,955,072

\*revised figures

\*\*Preliminary figures

Source: [www.cbs.nl](http://www.cbs.nl), [www.aardappelinfo.nl](http://www.aardappelinfo.nl), industry contacts, FAS/The Hague<sup>3</sup> Potatoes for consumption, including for fresh and processing use

## Appendix II

	Year	Harvested Acreage (Ha)	Yield Kg/Ha	Total Production/MT
Seed Potatoes	2005	2,452	23,810	58,381
	2006	2,582	24,100	62,222
	2007	2,541	25,100	63,778
	2008*	2,488	24,500	60,950
Ware Potatoes	2005	62,501	43,560	2,722,484
	2006	64,685	39,120	2,530,598
	2007	65,402	47,800	3,126,039
	2008*	61,516	46,560	2,864,250

\*Preliminary figures

Source: Belgapom