



British Potato 2017

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Commercial partners



AHDB BP2017

Nov 22nd 2017

Agenda

- 1. Introducing agri-benchmark**
- 2. Collaboration between *agri benchmark*, NEPG and AHDB**
- 3. European Potato production**
- 4. Production systems**
- 5. Crop storage developments**
- 6. European potato results**

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What is *agri benchmark*?

- A network of likeminded researchers interested in comparative, comparable costs of farm production from around the world

- The network represents **c.180** research participants in **58** countries
- Providing data from **300** Typical Farms enterprises and farming systems
- Covering farming data from **6** sectors including Beef & Sheep, Cash Crops (arable), Pork, Horticulture, Organic and Fish production



- Typical farms are present credible picture of the main farm systems and production areas in different physical regions around the world

NEPG and *agri benchmark*

Benchmarking collaboration

Our objective is to share data for potato producing countries that provides:

- Detailed farming systems data for a range of crops
- Comparable regional production costs
- A network for sharing best practice
- An understanding of trading partners challenges
- Insight into market opportunities and strengths with in a marketing region

We aim to build a portfolio of NEPG potato-farms in *agri benchmark* including: Belgium, France, Germany, Netherlands and the United Kingdom

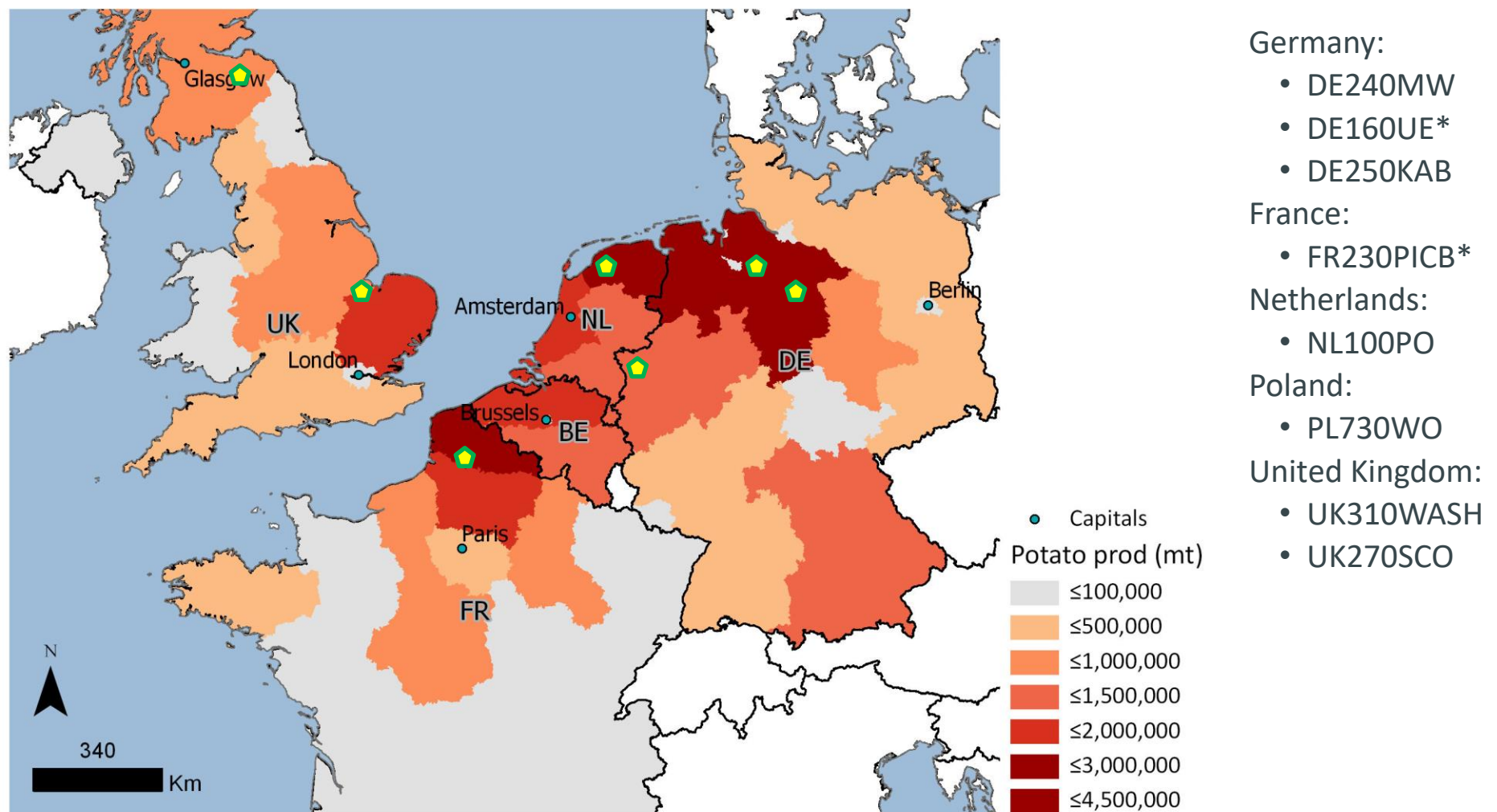
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NEPG and *agri benchmark*

Benchmarking collaboration



NEPG and *agri benchmark*

Benchmarking collaboration

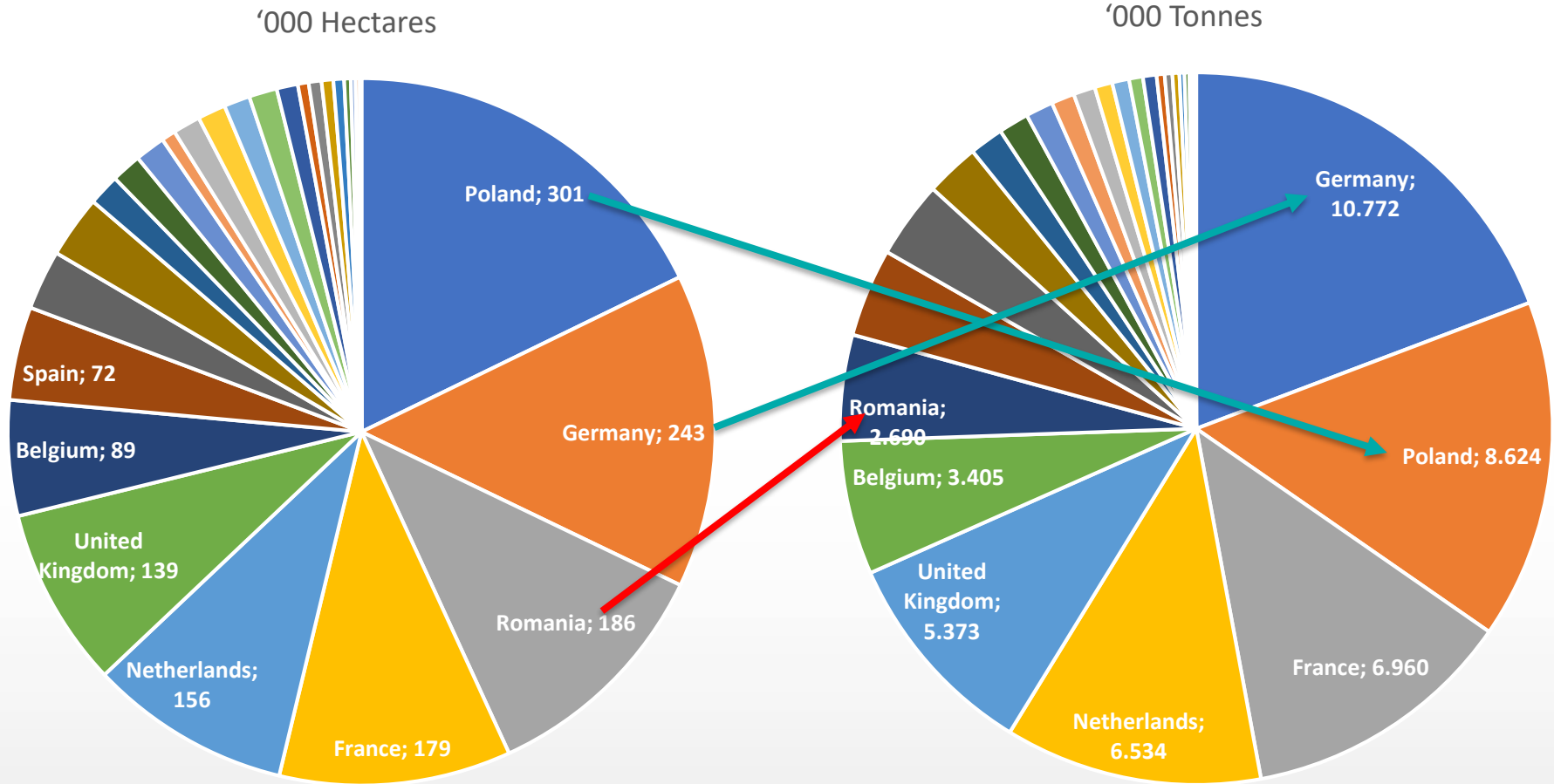
- Potato-farms already in the *agri benchmark* data : UK 1, Germany 3, France 1 (and also Poland 1)
- Farms added this year UK 1, Netherlands 1
 - In the next 2 years we aim to have:
 - UK 3 potato farms
 - Germany 3 potato farms
 - France 1 potato farm
 - Netherlands 2 potato farms
 - Belgium 2 potato farms

This will establish a strong representation of annual potato crop production costs across Western Europe.

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EU 28 - 2016 - Potato Area and Production















- Poland 50K ha more but 2Mil tonnes less than Germany
- Romania 3 largest area but rank 7th in production

Source :Eurostat

NEPG performance: 2017 vs previous 5 years

Production (x 000t)	2016	2017	5y-avge	5 yr Trend
Total	24.580	28.936	25.027	
Belgium	4.038	5.035	3.882	
Germany	7.485	8.950	7.552	
France	5.110	6.121	5.268	
Netherlands	3.363	4.078	3.613	
Great Britain	4.583	4.751	4.713	

Hectareage	2016	2017	5y-avge	5 yr Trend
Total	553.118	585.921	534.312	
Belgium	91.368	96.281	79.102	
Germany	164.500	179.000	162.263	
France	125.250	131.640	119.188	
Netherlands	72.800	75.800	71.388	
Great Britain	99.200	103.200	102.370	

Yield (t/ha)	2016	2017	5y-avge	5 yr Trend
Total	44,4	49,4	46,8	
Belgium	44,2	52,3	49,1	
Germany	45,5	50,0	46,5	
France	40,8	46,5	44,2	
Netherlands	46,2	53,8	50,6	
Great Britain	46,2	46,0	46,0	



Data courtesy of NEPG

Agenda

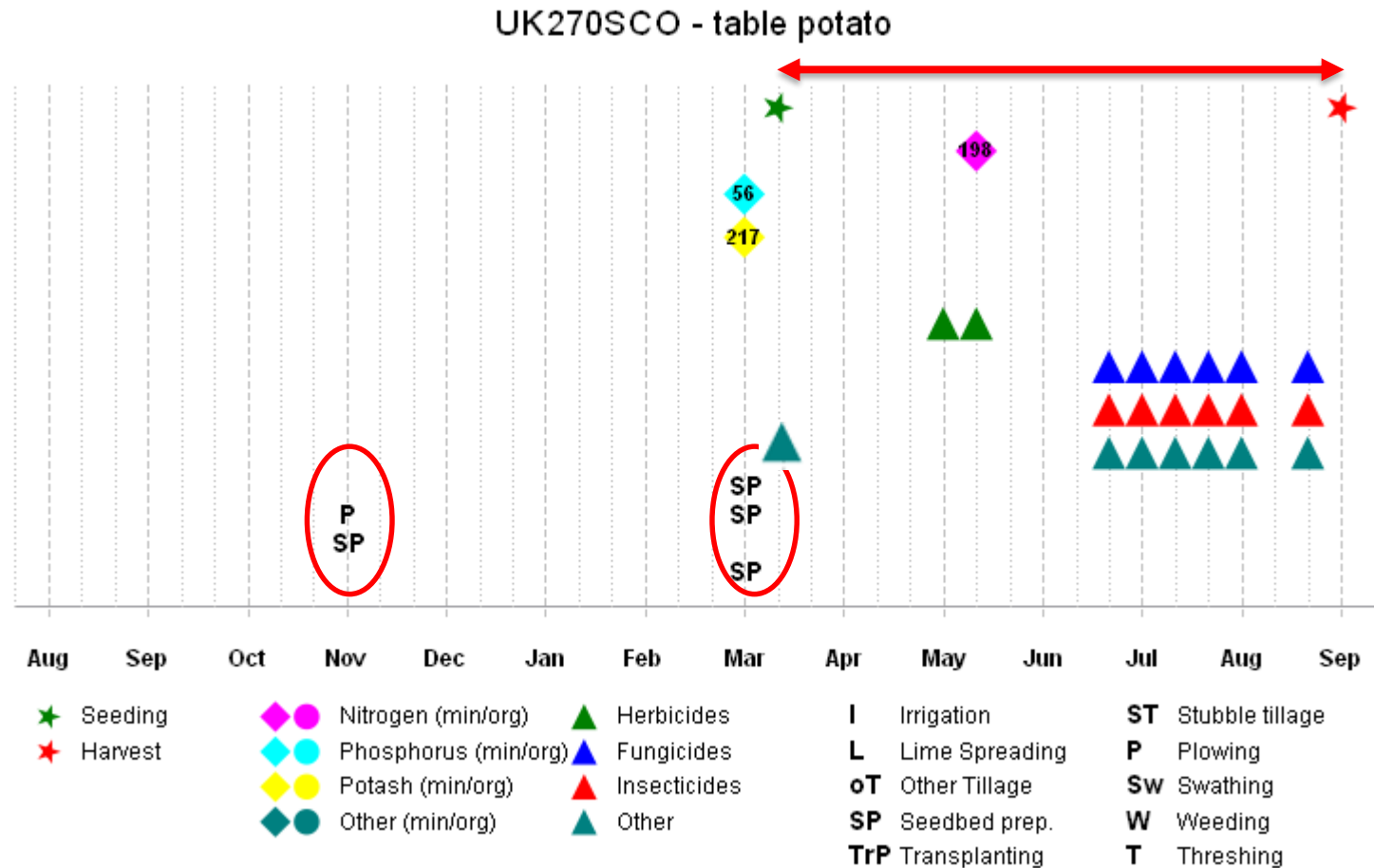
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Reflection of some production systems

Nom. 23 weeks growing season

PCN treatment at planting

Intensive seedbed prep



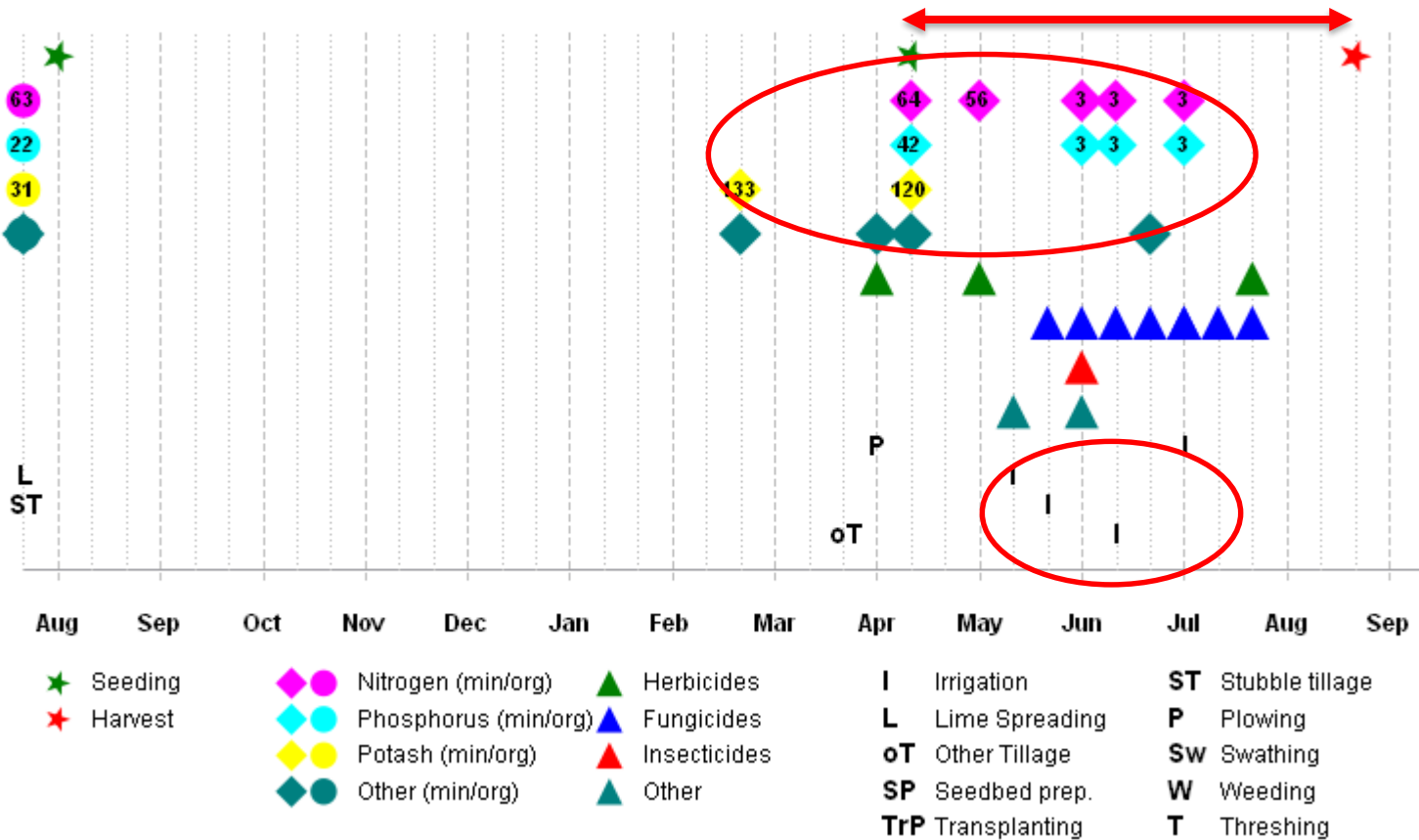
Reflection of some production systems

Nom. 18 weeks growing season

Intensive fertilizer program: including foliar treatments

Irrigation 4 passes

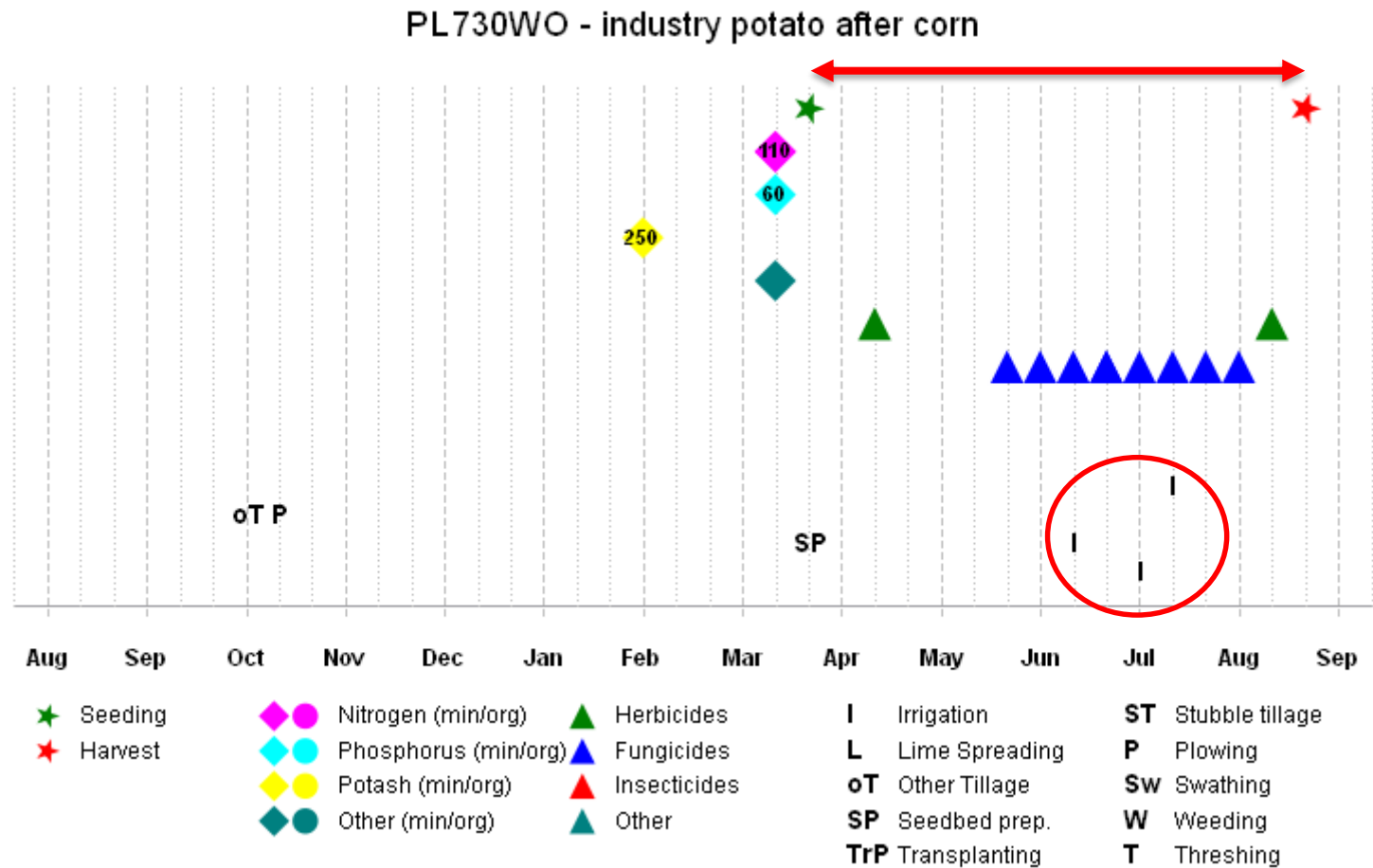
DE160UE* - table potato after winter wheat



Reflection of some production systems

Nom. 20 weeks growing season

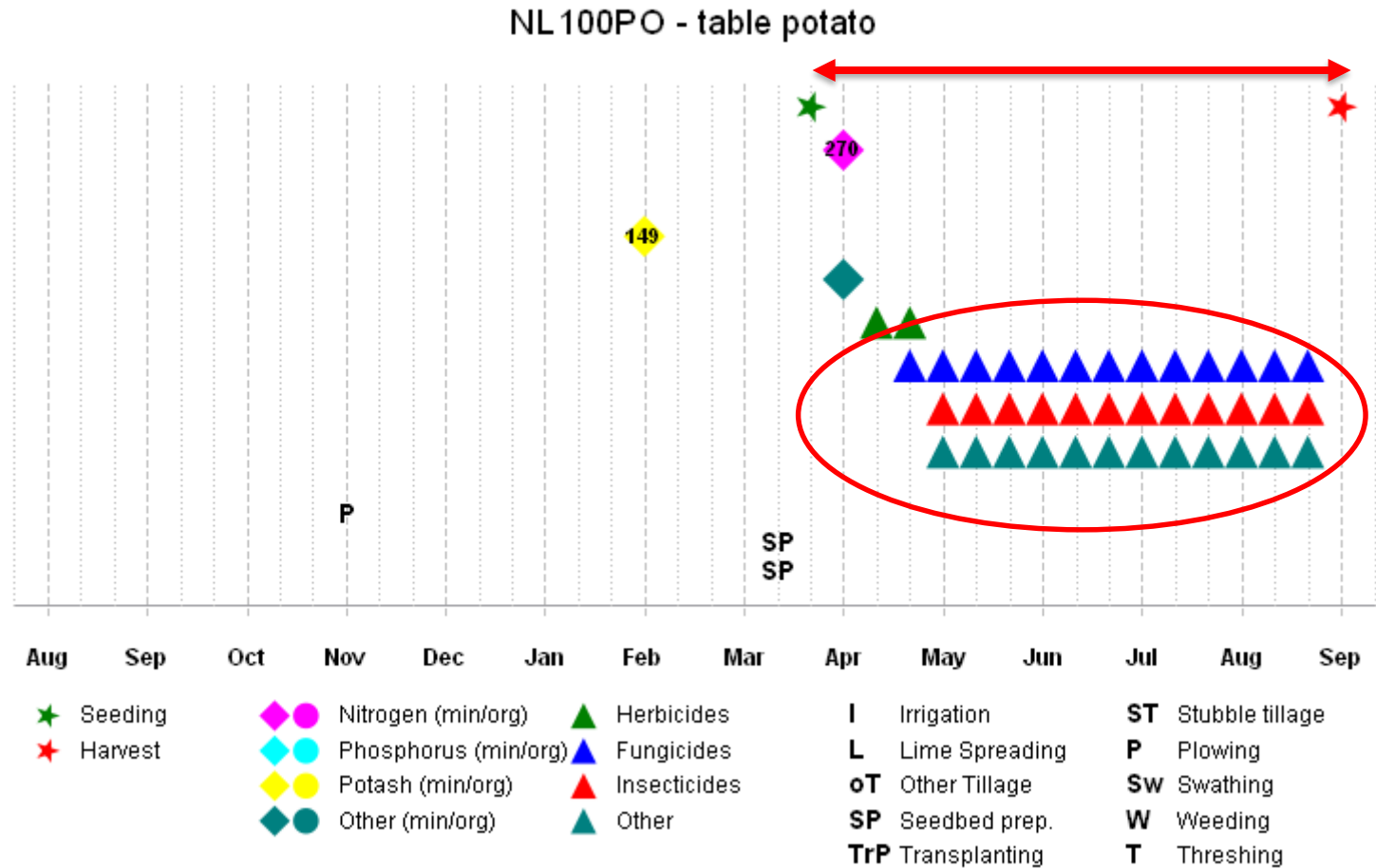
Irrigation 3 passes



Reflection of some production systems

Nom 21 weeks growing season

Intensive spray program - 16 passes



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In development: Crop storage analysis

- To date *agri benchmark* has focused on field production costs
- With increased potato data we are extending the framework to include crop storage and post harvest crop treatments.
- This won't apply to all crops in the results data
- But will allow reflection of variations in crop prices arising from storage and grading operation
- This work will be part of our future output with the NEPG group



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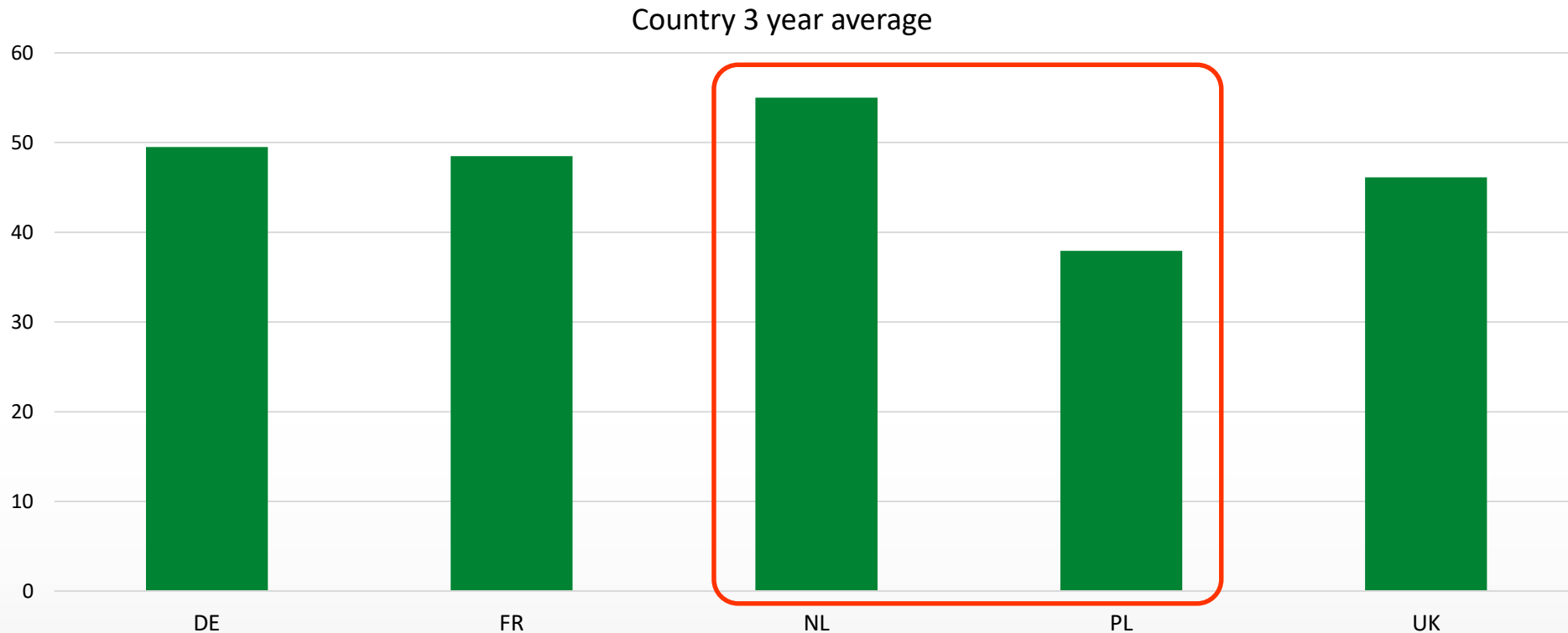
Results Agenda:

- 1. Yields and Prices**
- 2. Profit and Productivity**
- 3. Input Costs**
- 4. Operational Costs**
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Results Agenda:

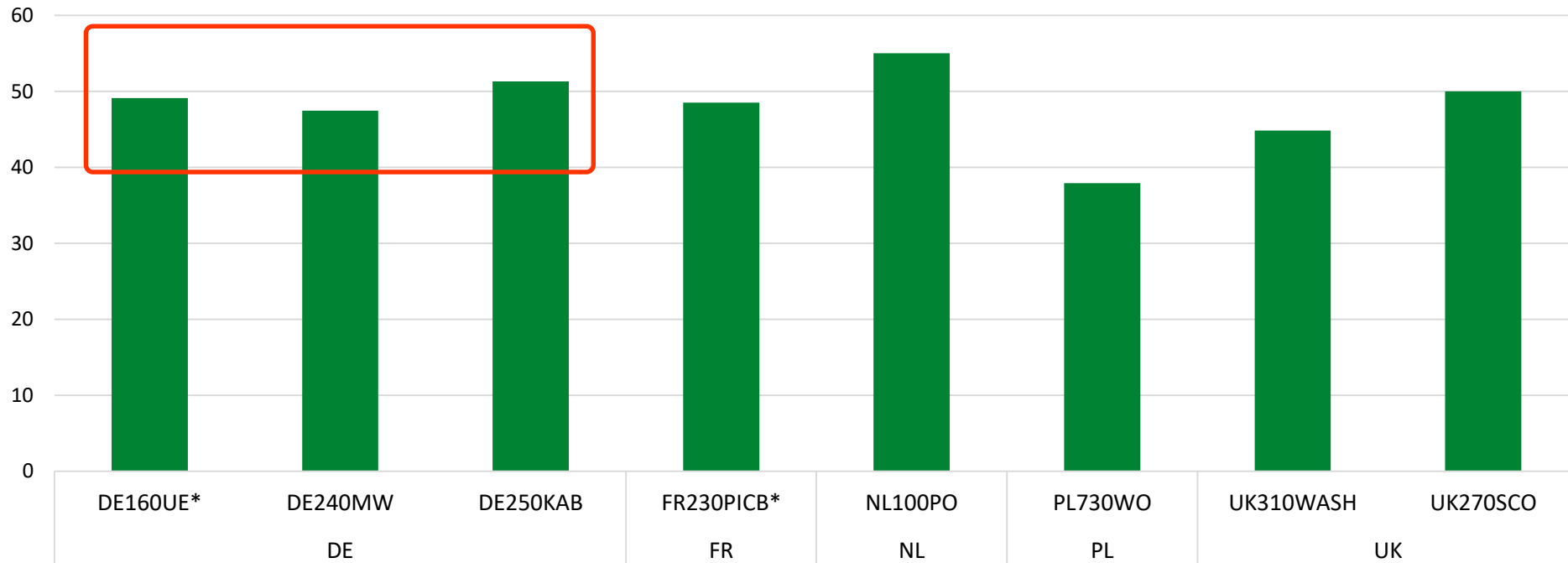
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Crop yields (3 year averages) - t/ha



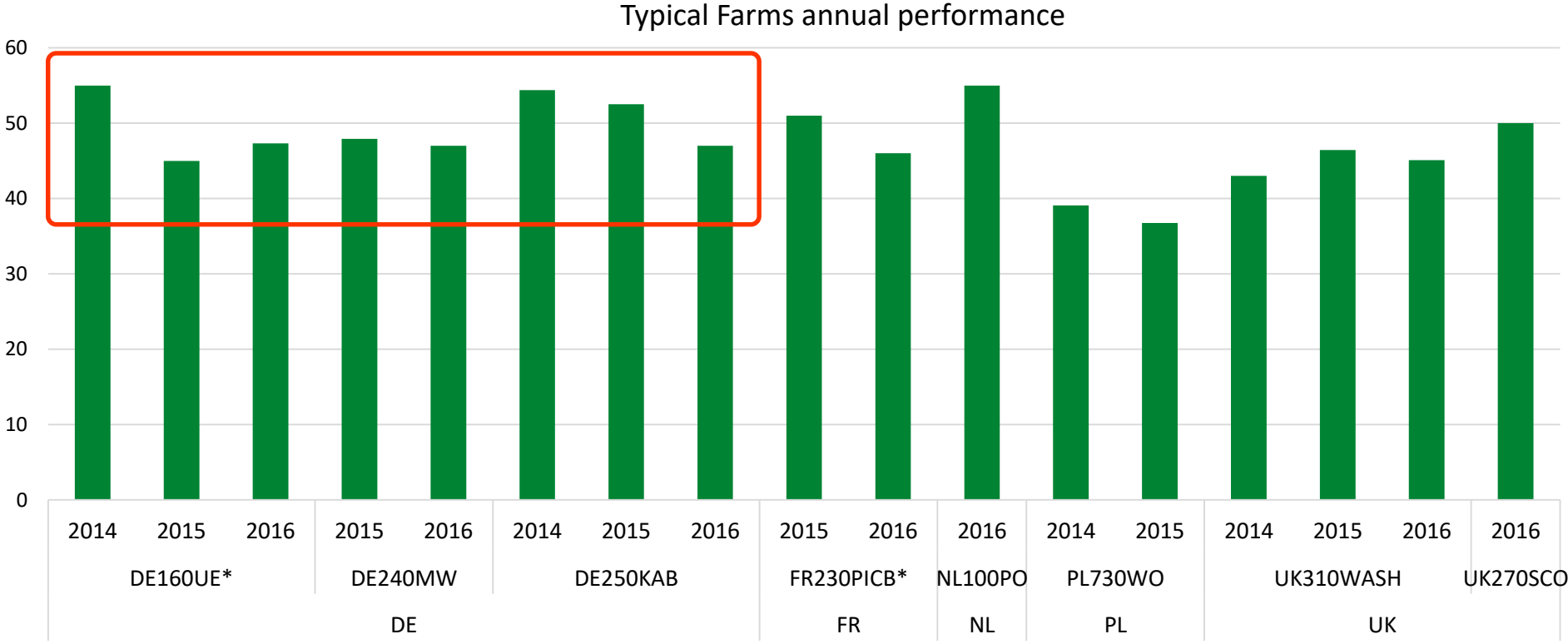
- Data reflecting differences between regional performances
- Note the difference in yields. High production can deliver high productivity

Typical Farm Yields (3 year average) t/ha



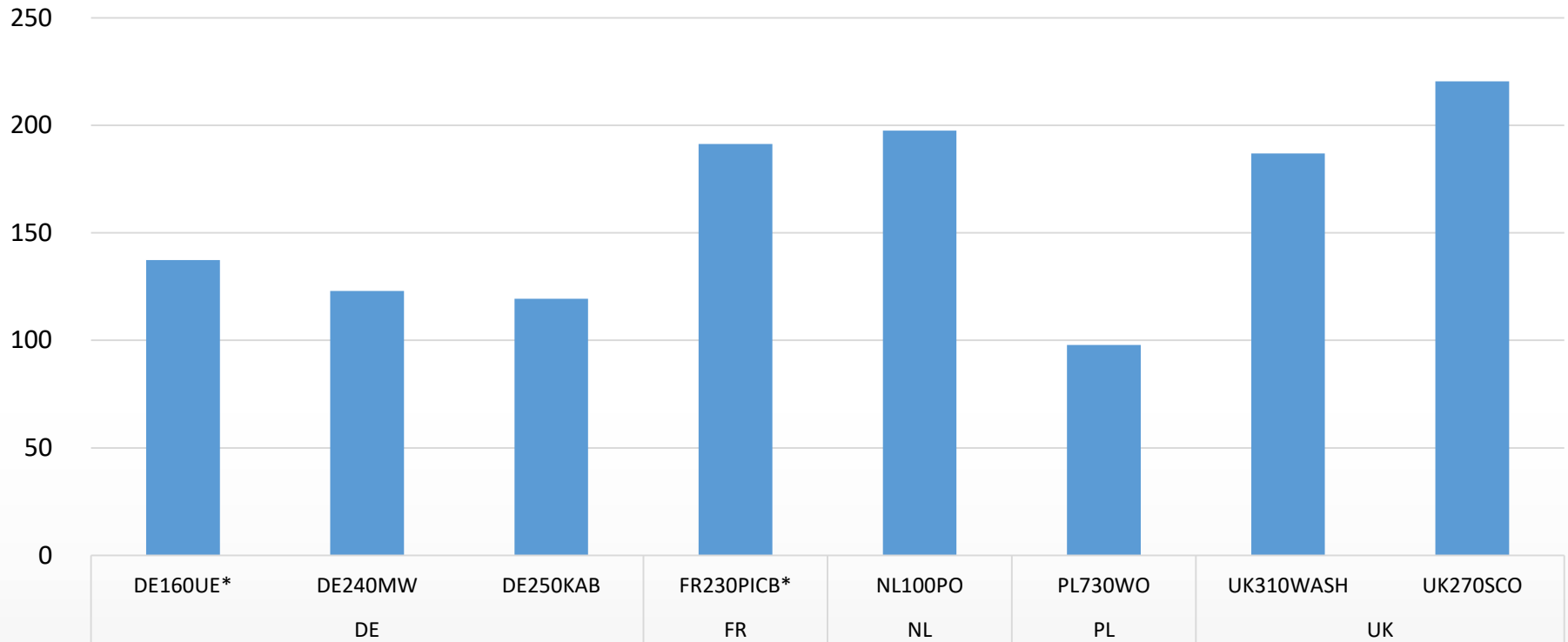
- Data reflecting differences between systems

3 years of Yields t/ha



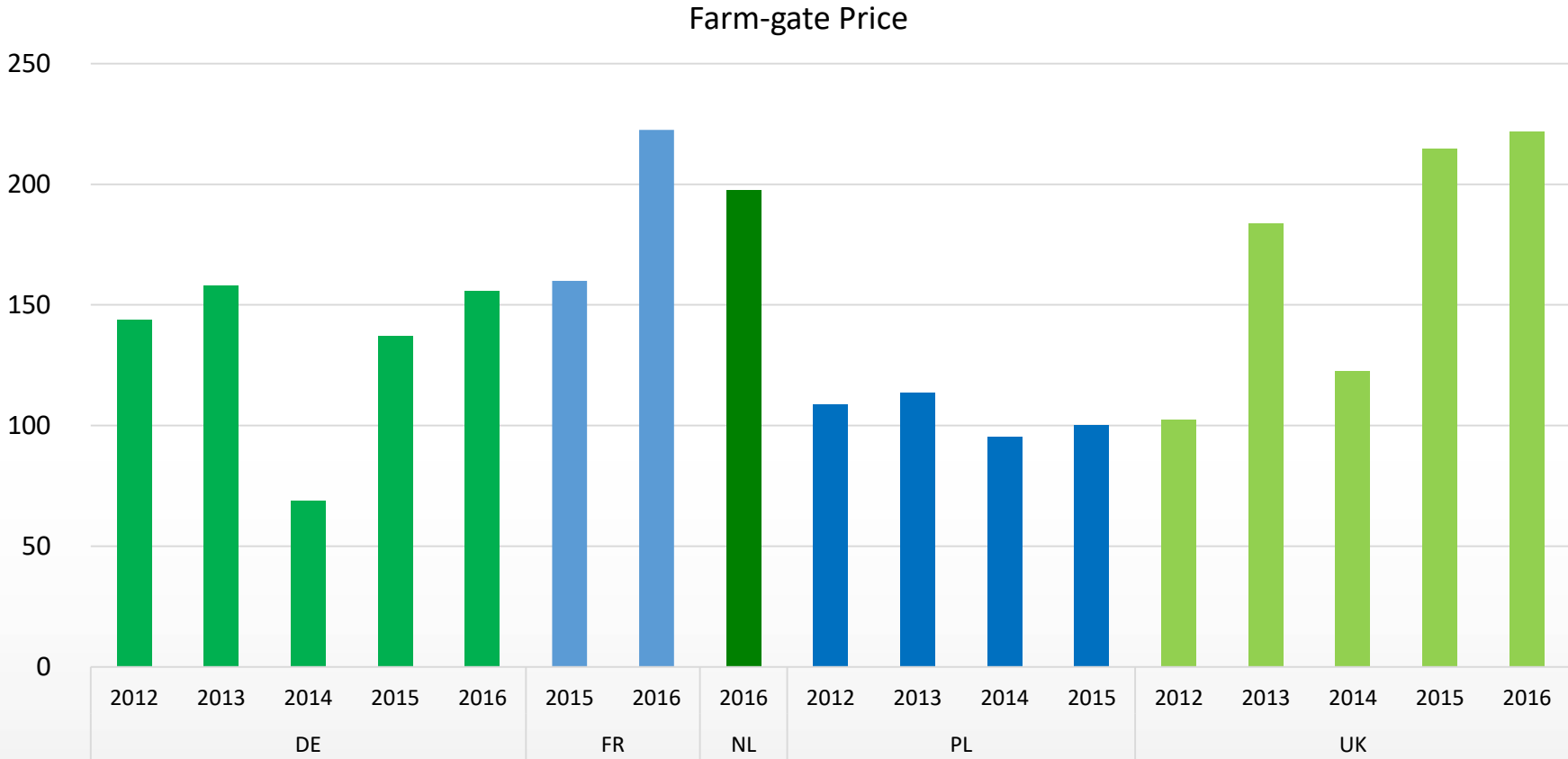
- Data reflecting year on year variations

Farm-gate Prices €/tonne



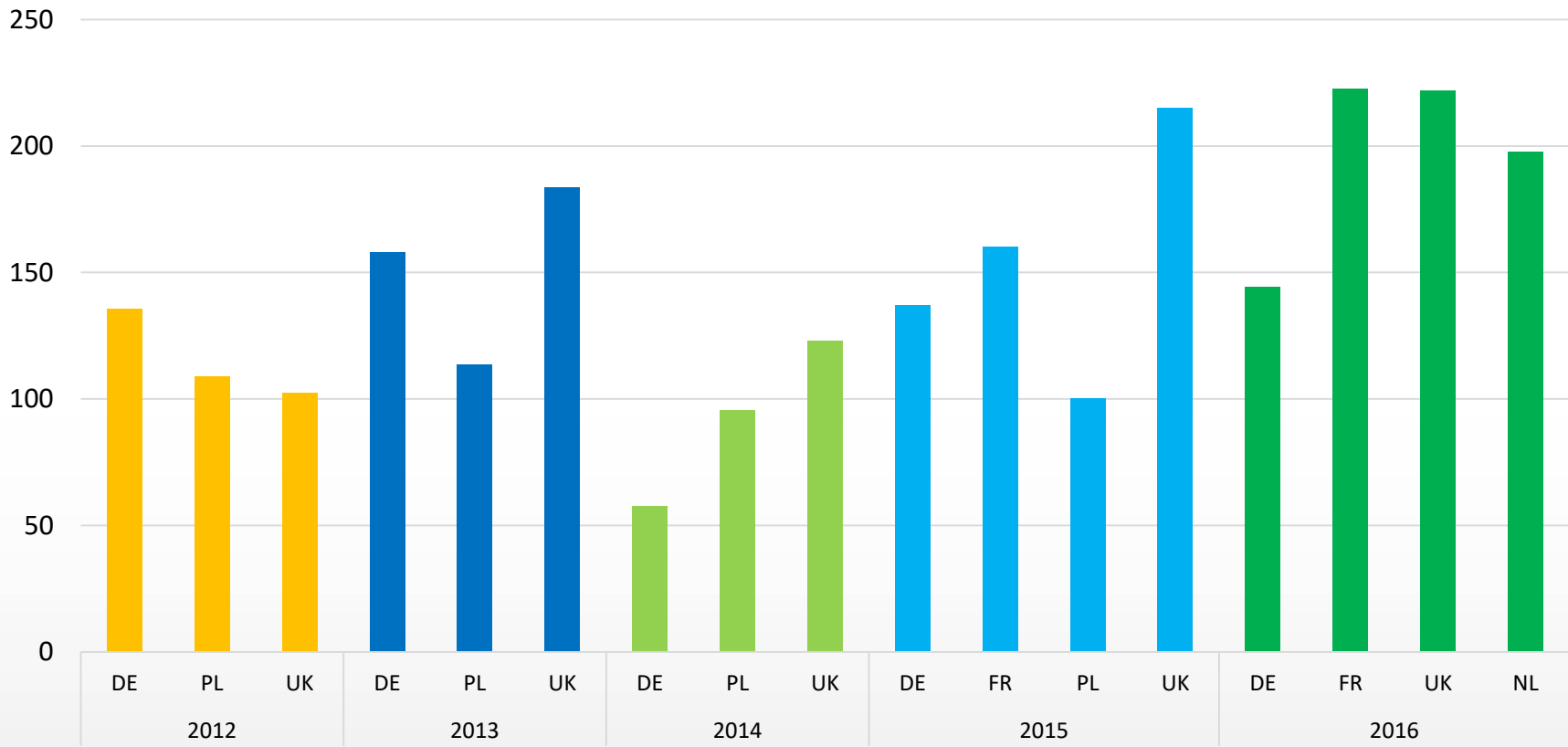
- Price variation to reflect system differences

General seasonal price trends - €/t



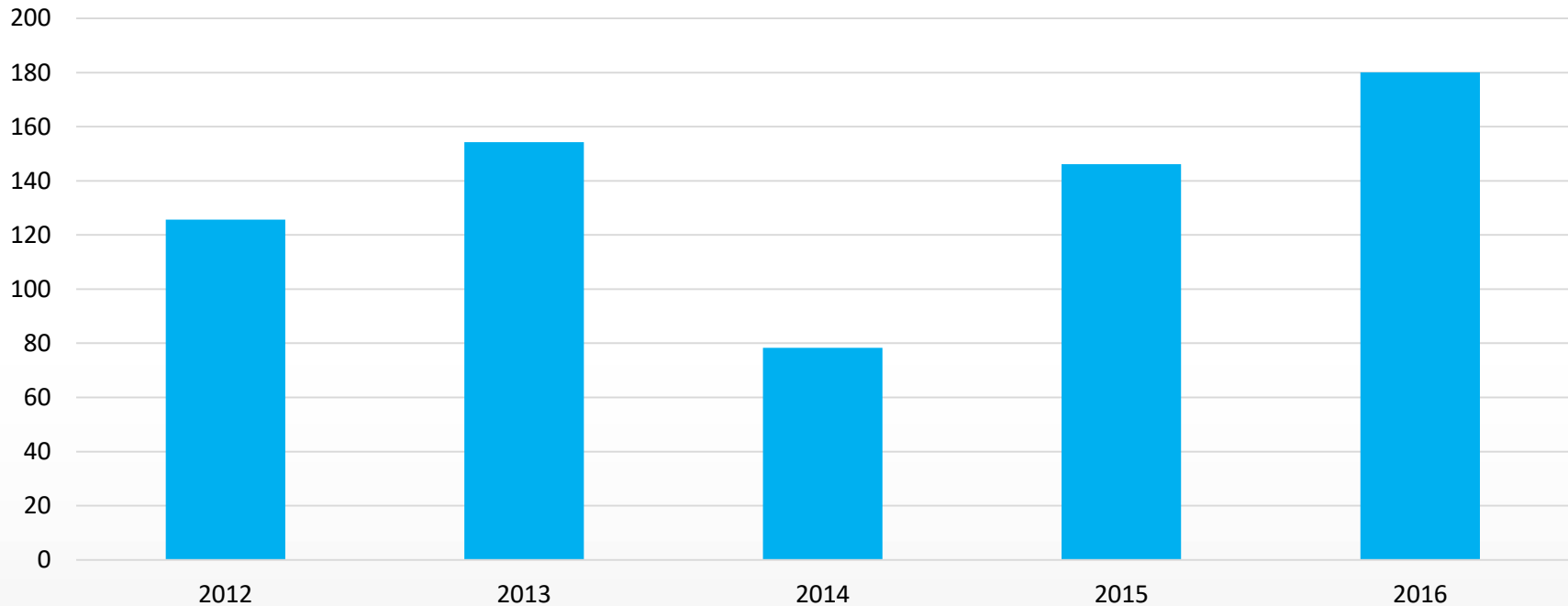
- Country prices are not always closely linked – winners and losers

General seasonal price trends - €/t



- Markets are seasonally sensitive too

General seasonal price trends - €/t



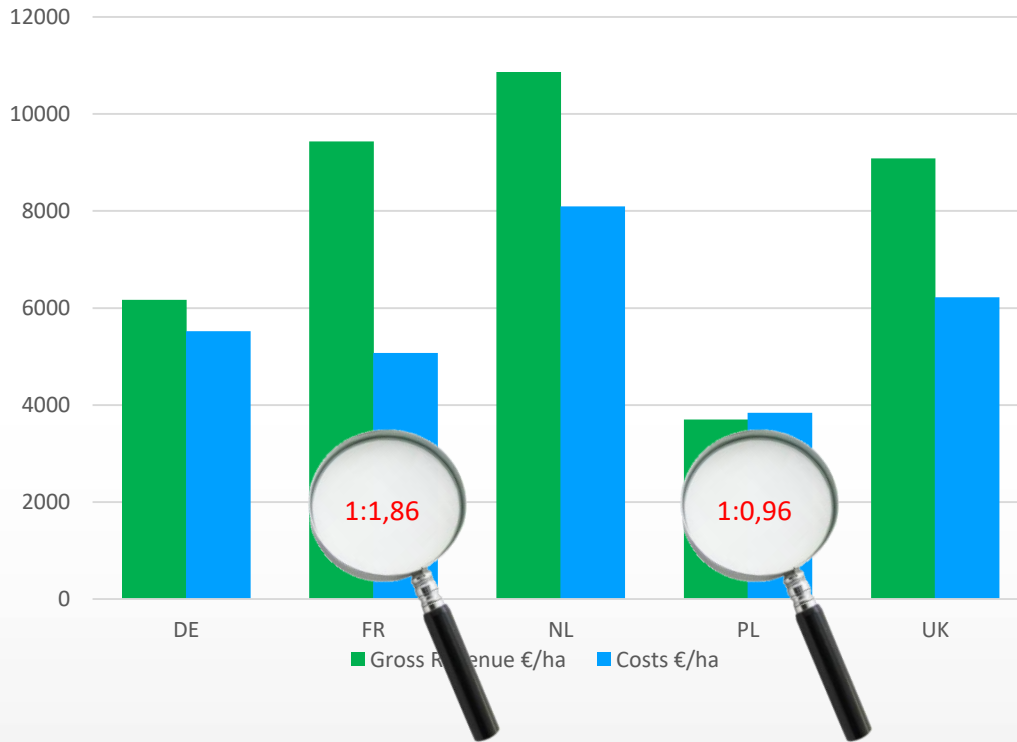
- There are pan-Europe price trend reflecting the seasons

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Overall Profit and Productivity - €/ha

Productivity



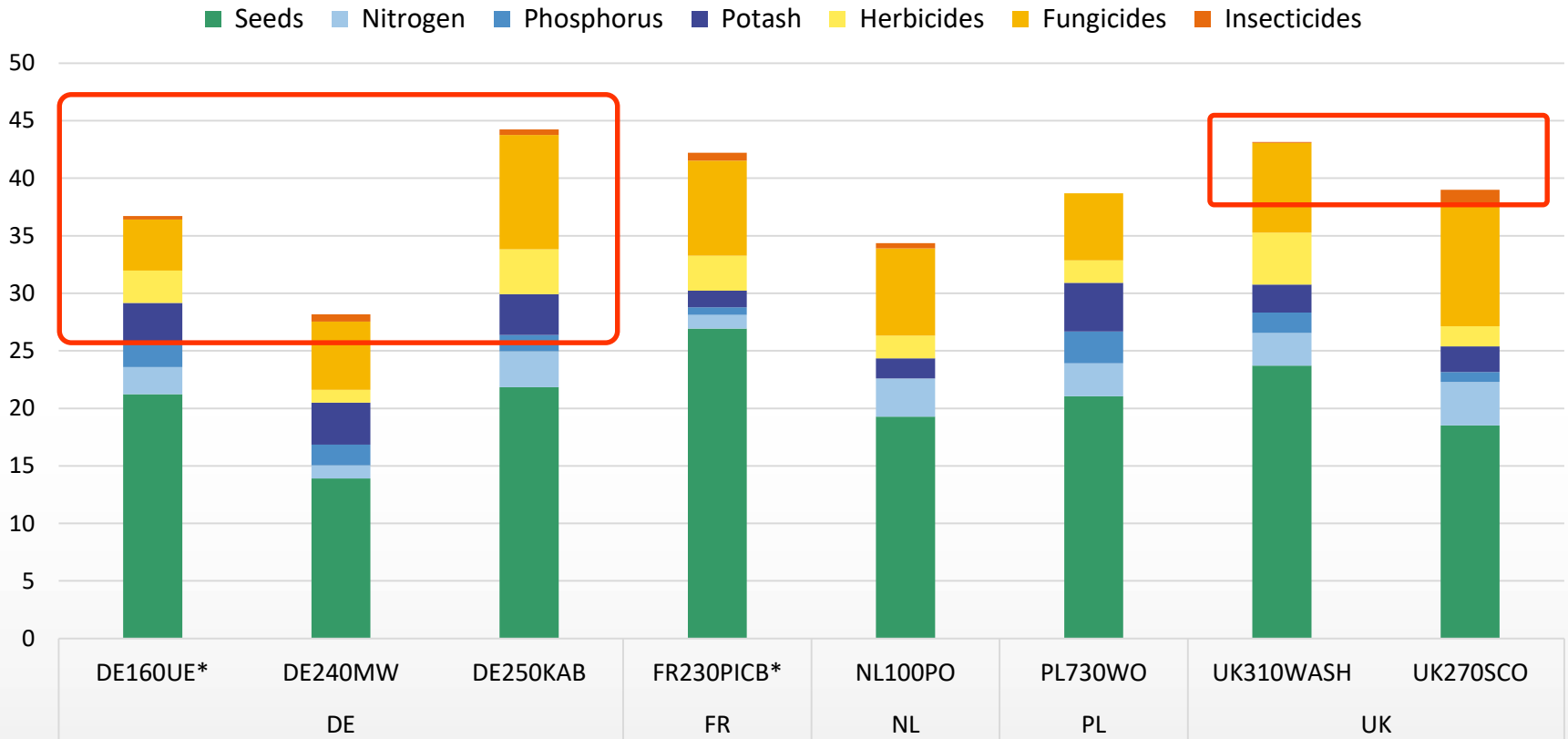
	Gross Revenue €/ha	Costs €/ha	Efficiency Factor €In:€Out
DE	6.168	5.523	1:1,12
FR	9.432	5.074	1:1,86
NL	10.862	8.092	1:1,34
PL	3.703	3.840	1:0,96
UK	9.084	6.220	1:1,46

- Productivity: output produced per unit input
- Profit: margin after input costs are covered

Results Agenda:

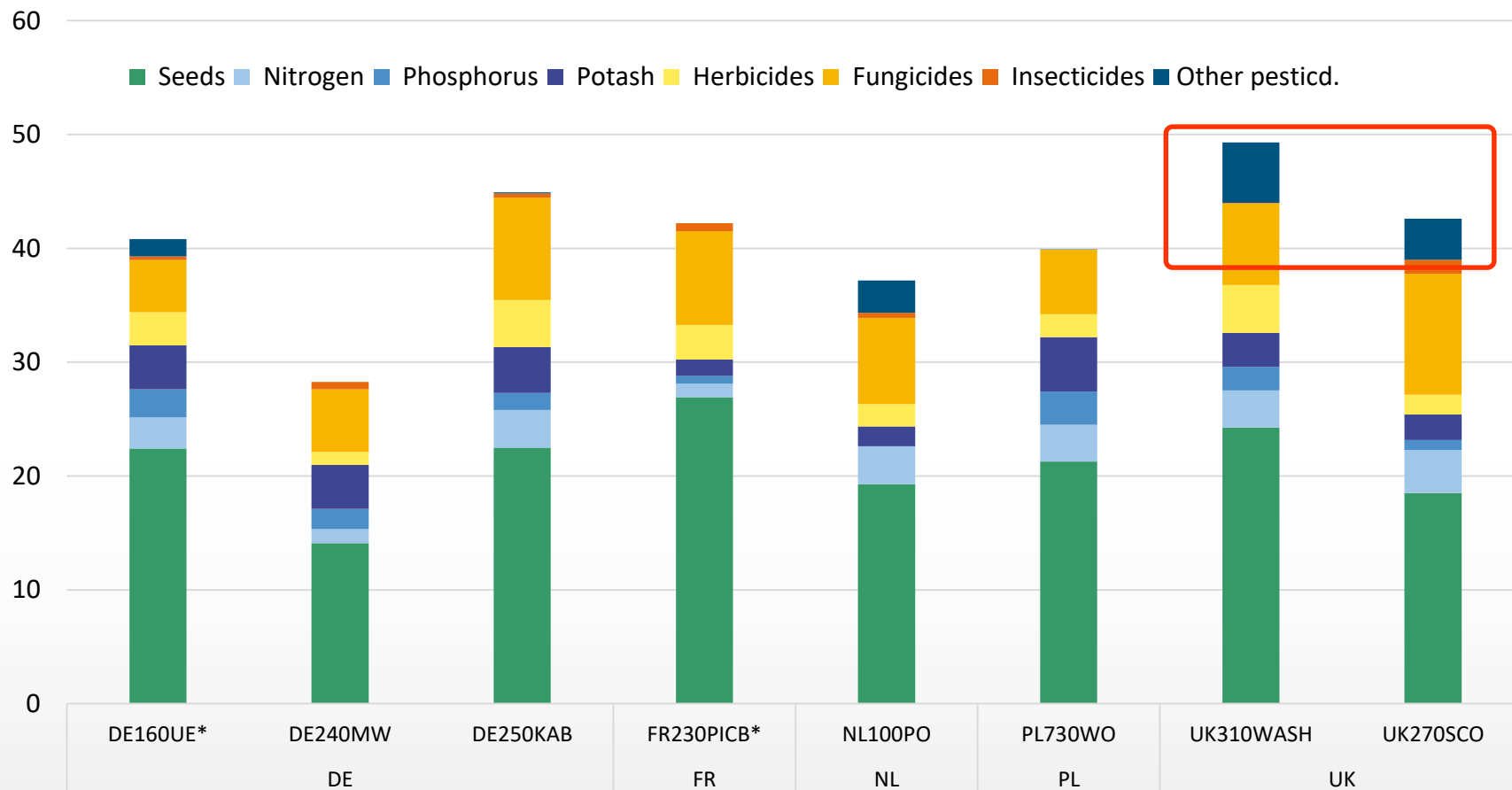
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Typical Farms - Key input costs - €/t



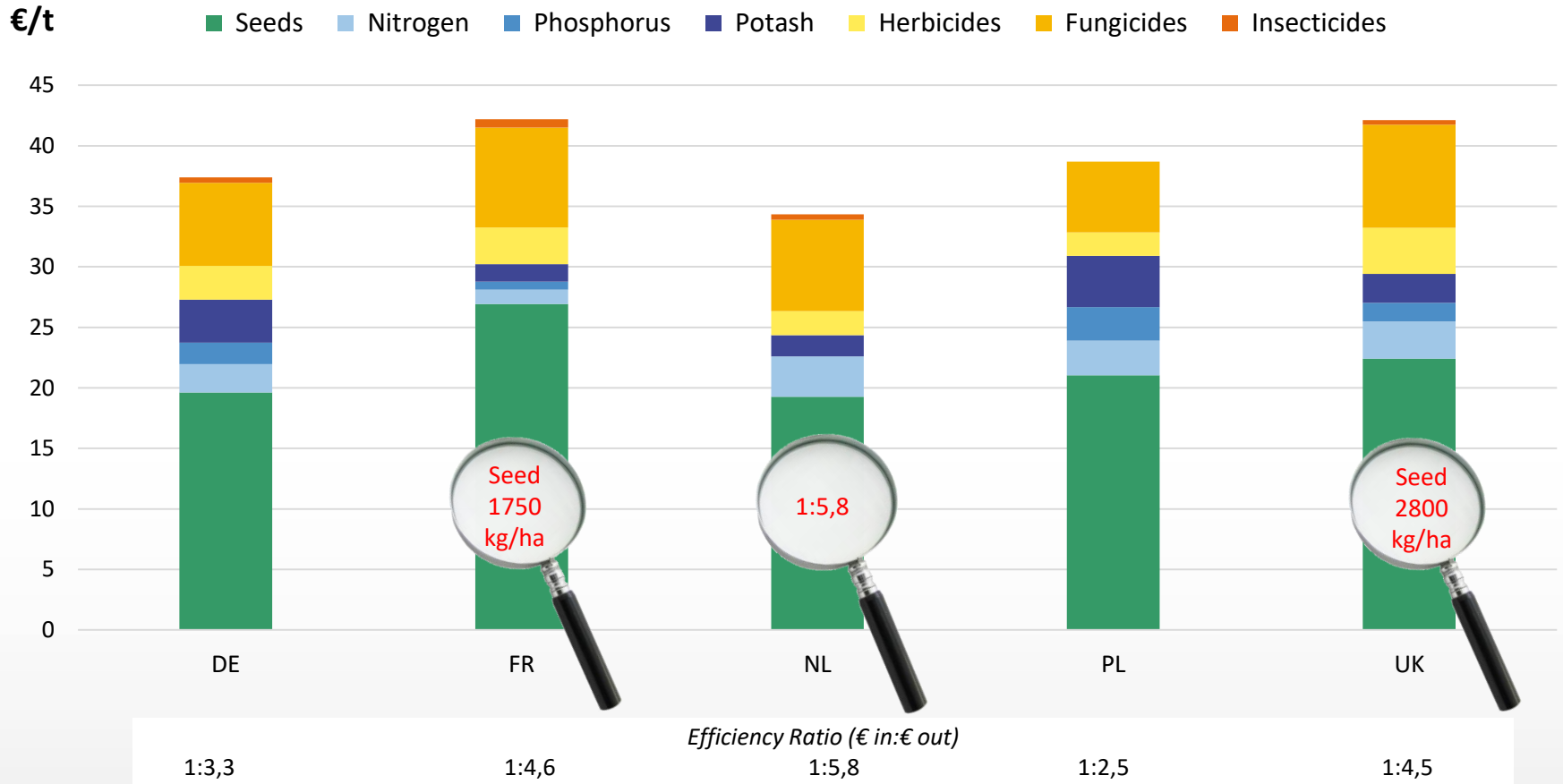
- System variation can show significant variations

Typical Farm - input costs (inc. Other Pesticides) - €/t



- UK challenge around PCN and nematicides

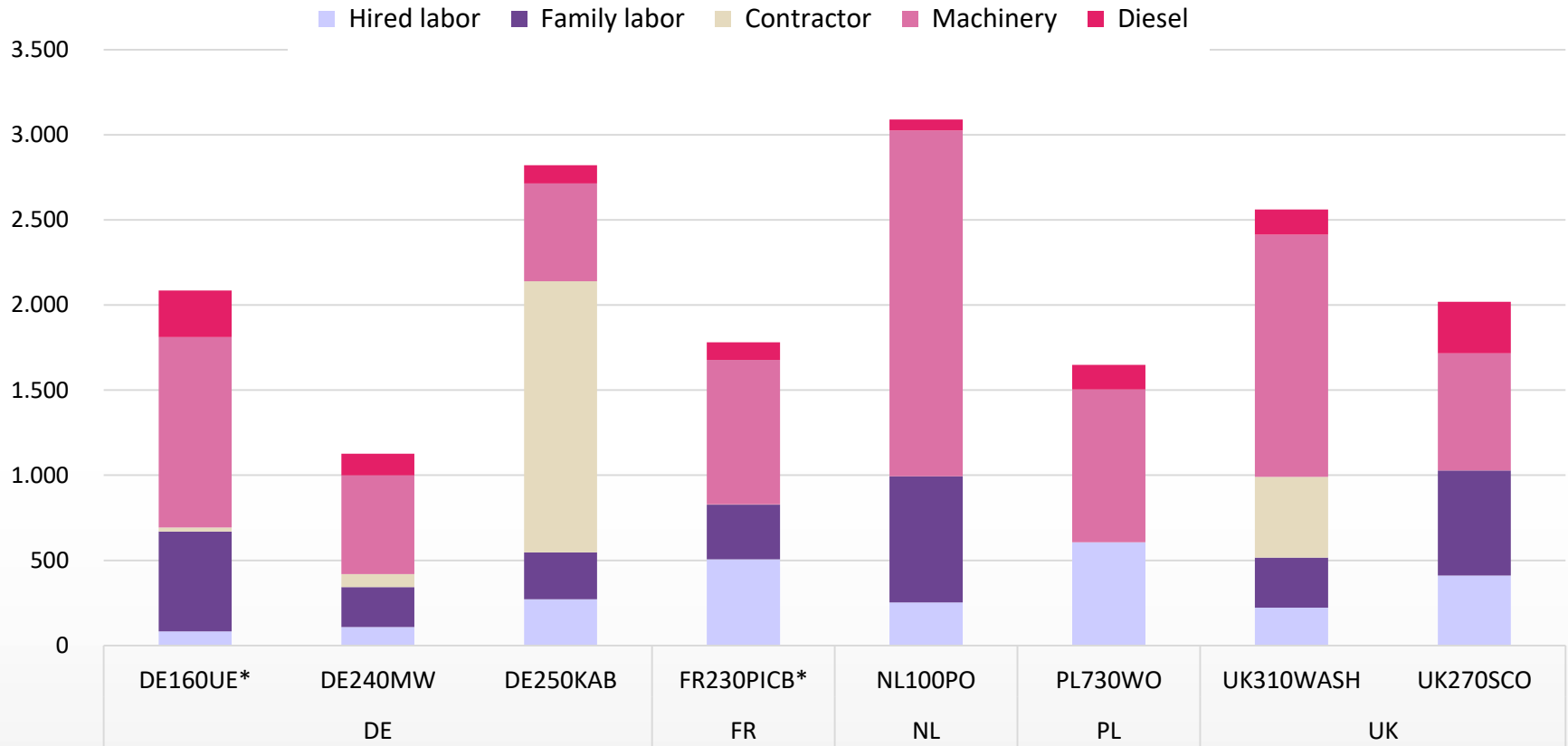
Direct input costs (3 year Average) - €/t



Results Agenda:

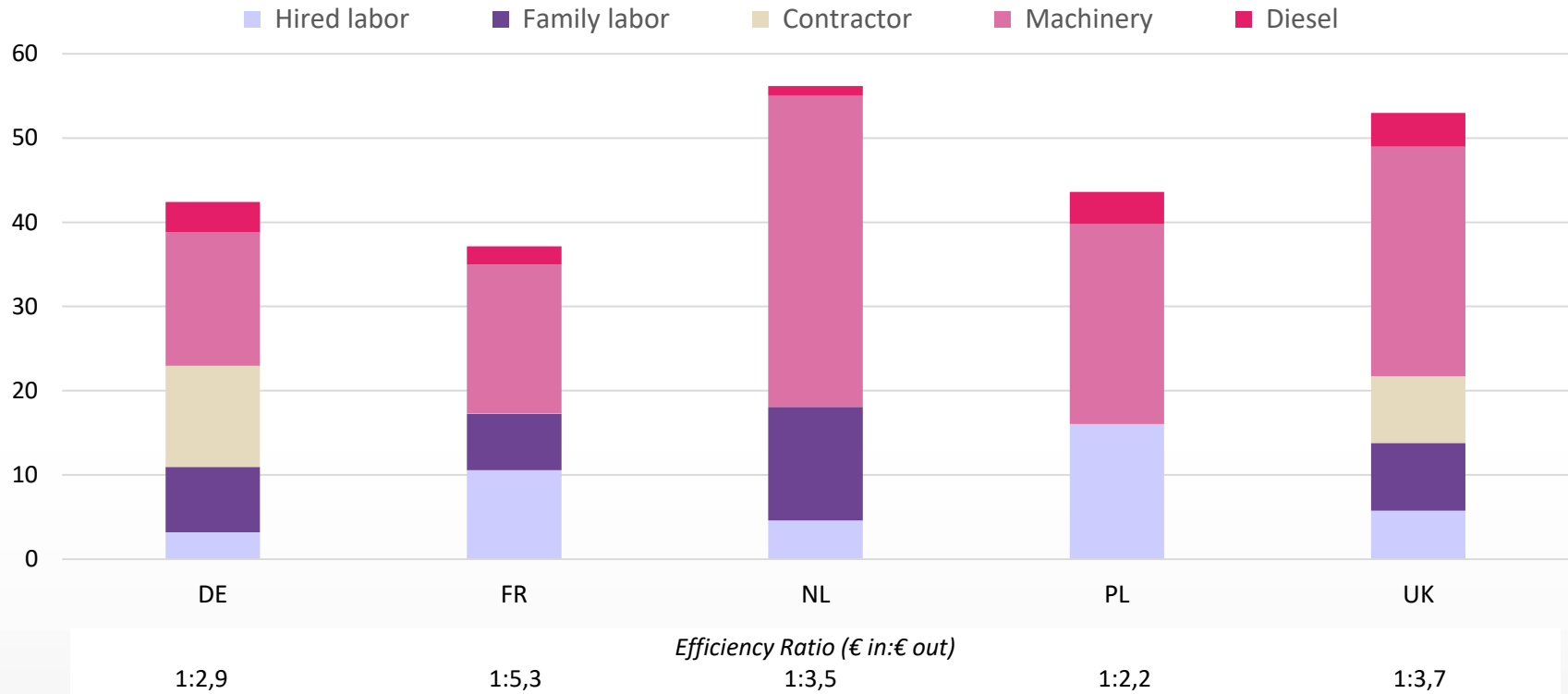
1. Yields and Prices
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Field Operational costs - €/ha



- System differences in use of labour or contractors
- Variations in use of deisel

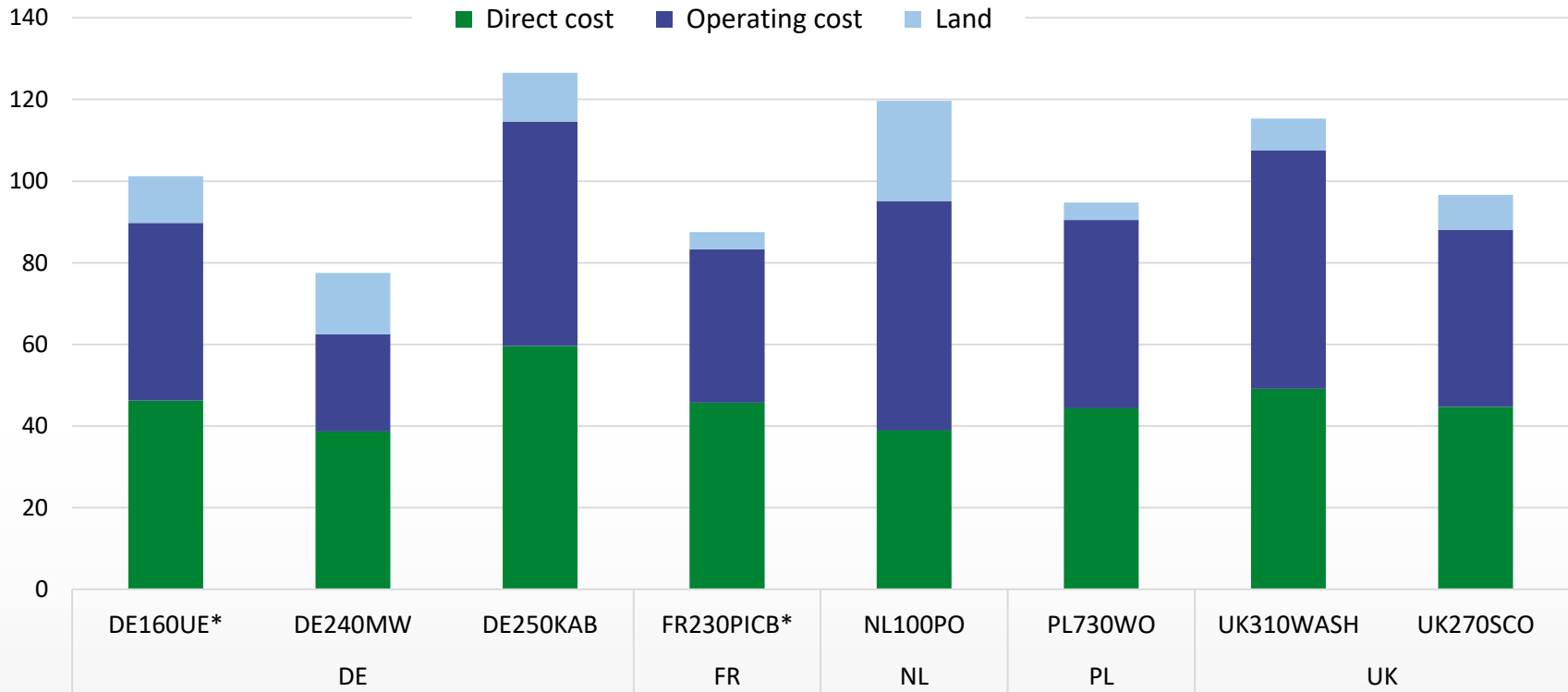
Field Operational Costs - €/t



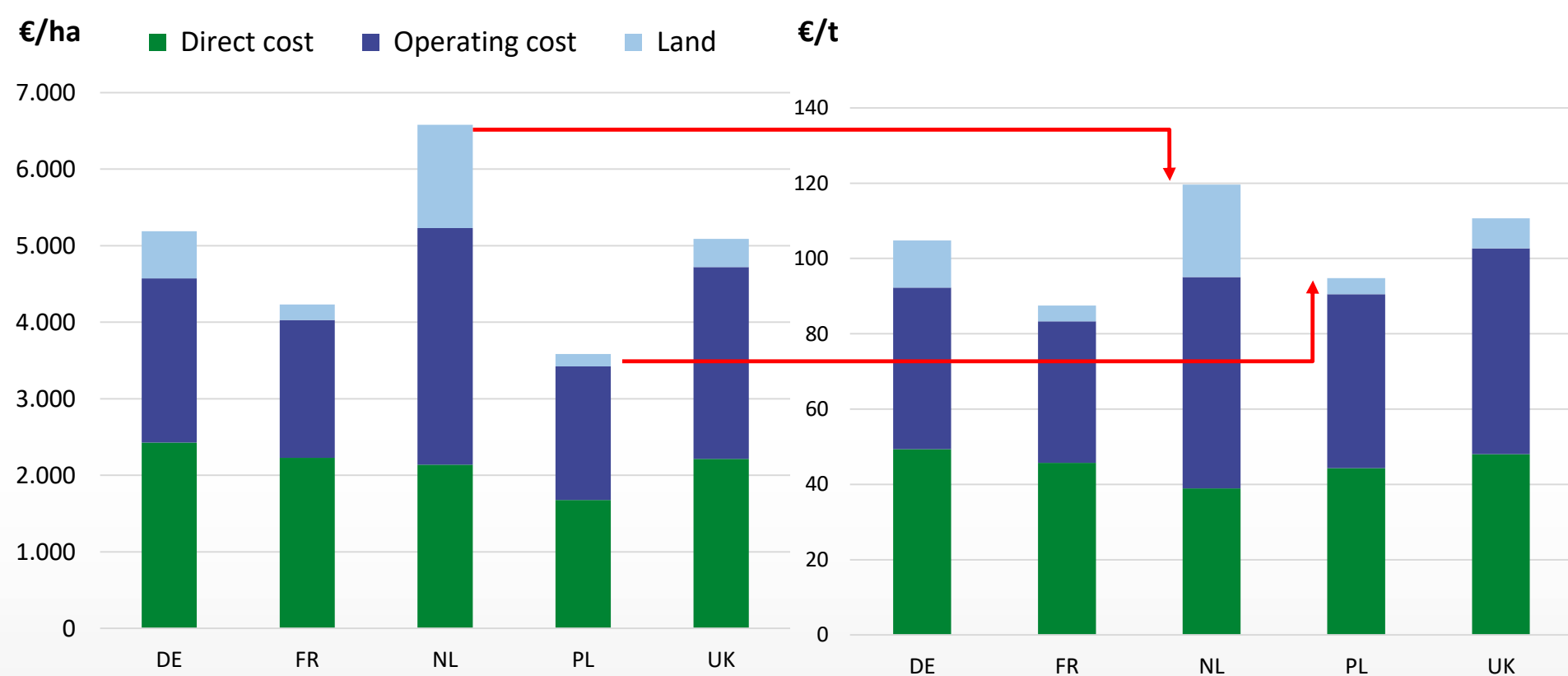
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Production Cash costs - €/t



Key Production Costs comparison

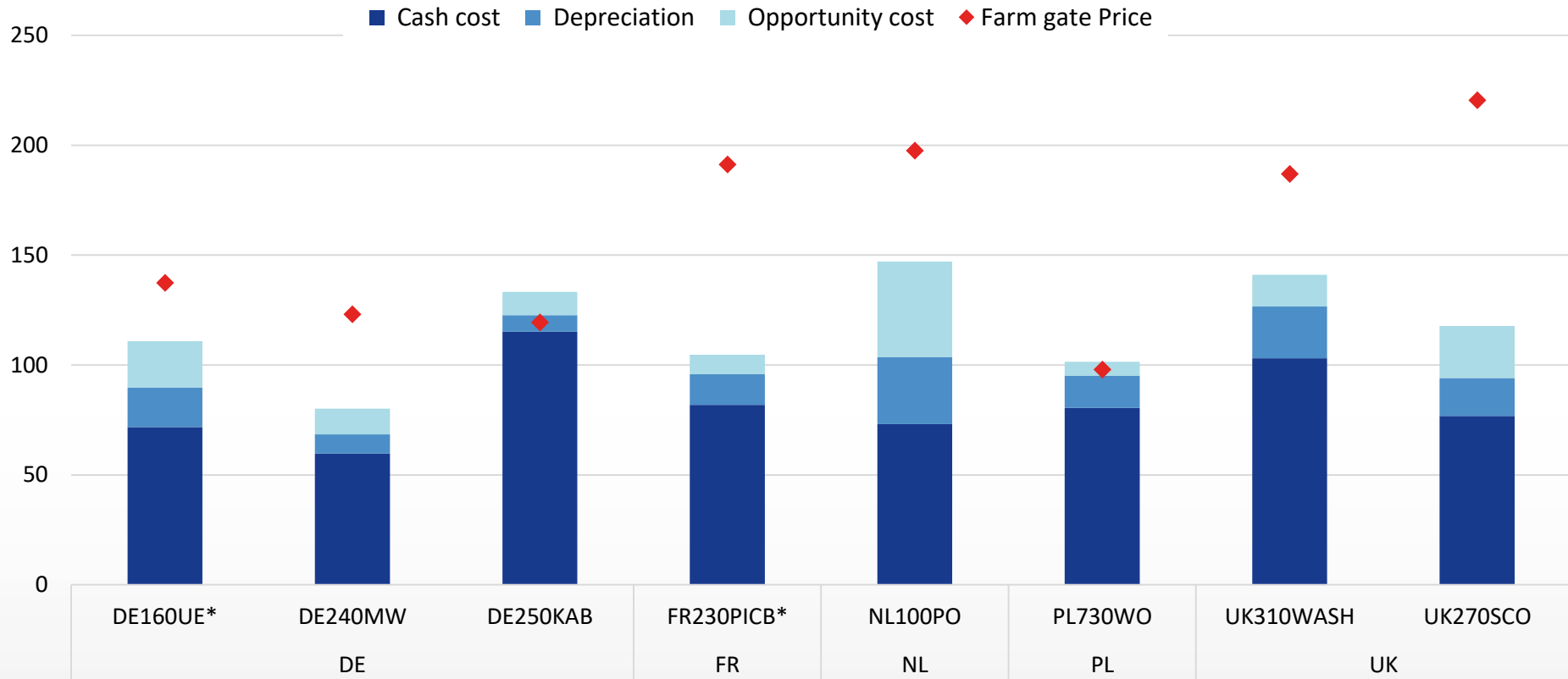


- Crop productivity per Tonne is the key differentiating factor

Results Agenda:

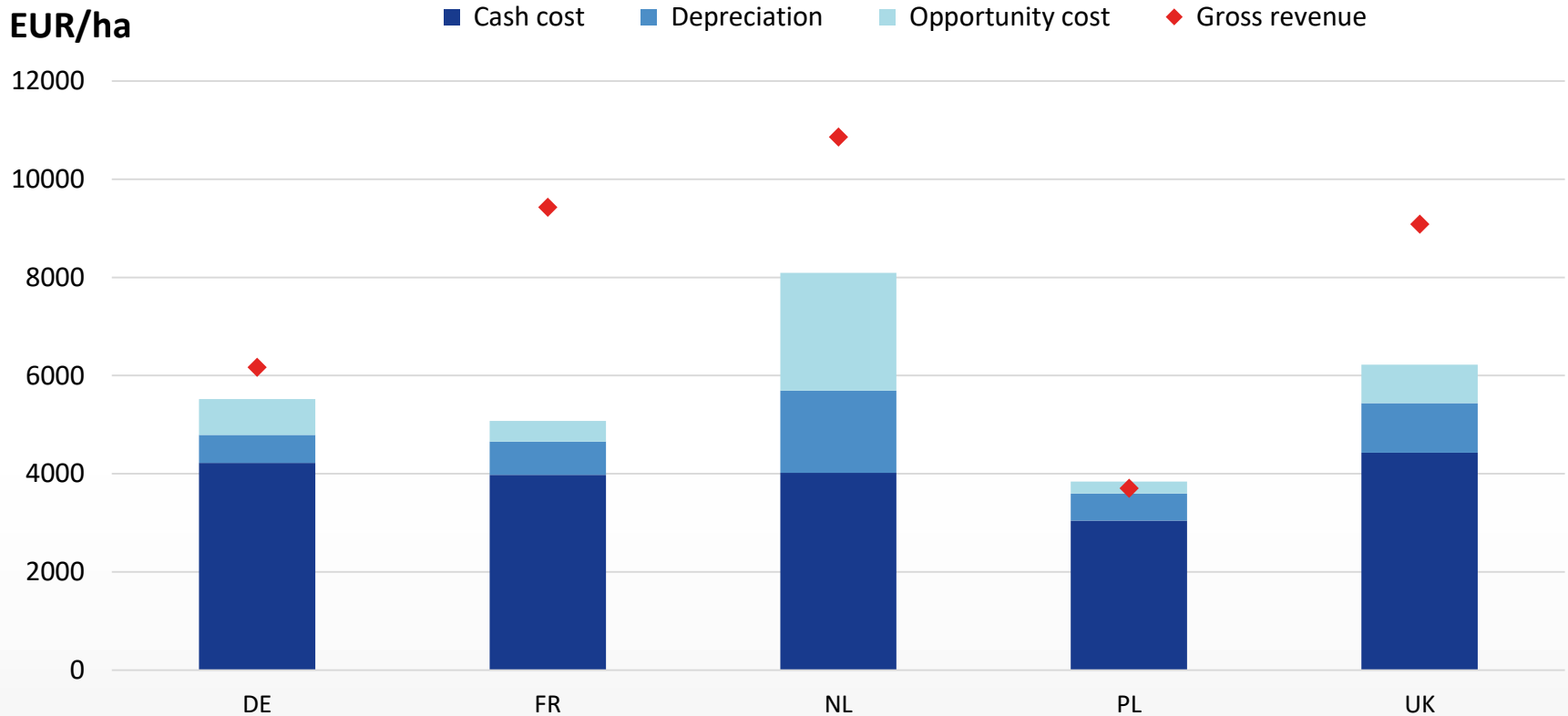
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Total Costs and Farmgate prices - €/t



- Poland not showing a competitive edge
- France and Holland are competition to understand to avoid losing market share

Total Costs and Farmgate prices - €/ha



- Key cash costs per Hectare are very similar... however...
- Land costs and investment differences in W. Europe are significant

Conclusions

- The potato market is strongest near points of consumption, this may change as production capacities develop further afield
- The capacity for eastern European countries to improve their production is significant
- Production cash costs are on average similar but land and investment cost differences can be very different
- We are developing the research network and scope of our research in potatoes

Let's grow together.

Thank you for your interest in



jointly managed by:  THÜNEN &  global networks



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