

## A season of hard lessons

*The 2025/26 season will be one that many growers will want to forget or at least learn lessons from.*

Oversupply in the UK and, more particularly, in Europe has sent free-buy prices plunging. At least there is some protection for British growers from a market that has seen prices tumble to zero in Belgium and the Netherlands, while some growers have had to resort to paying livestock farmers to take their potatoes for feed. Oversupply in the EU might be as much as five million tonnes.

The fact that the UK is not self-sufficient in potatoes has helped, although what the actual supply situation is unclear because of a delay in figures from Defra. *World Potato Markets* calculations put the 2025 UK crop at just below five million tonnes. We have suggested a 101,000 hectare UK area of all potatoes (consumption and seed) this year, down from 107,000 hectares last. Average yields could result in a 4.6 million crop. Those are estimates and highlight the need for more accurate information; something that the GB Potatoes annual survey should help provide.

Planting has been later than last year, but well ahead of the cold and wet springs of 2023 and 2024. Conditions have dried significantly after the very wet winter and crops should get a good start, with adequate supplies of water available for irrigation if needed. However, a repeat of last year's bumper crops in the UK and the rest of Europe could be a disaster.

## Trade gap narrows

The UK's potato trade balance is still in massive deficit, but it is improving a little as imports dip. Exports of fresh ware potatoes fell by 6.0% in the eight months to the end of February compared to the same period last season to 106,737 tonnes, according to HMRC figures, with February trade itself up a third to 16,826 tonnes. Ware imports in the eights were down 55.9% to 28,758 tonnes.

A 12.3% drop in seed potato exports to Egypt drove an 8.4% decline in total exports to 89,794 tonnes, in the eight months to the end of February. However, there were some bright spots with a 6.1% increase in sales to Morocco and 21.8% rise in demand from Thailand. Seed imports were down 34.8% to 4,630 tonnes over the same period.

February imports of frozen fries were at their lowest monthly total since February 2022 at 60,814 tonnes, with imports over the previous year down 3.2% to 833,235 tonnes. Belgium and the Netherlands still account for more than 92% of that trade which is worth more than a £1 billion a year. Although UK frozen fry exports are dwarfed by imports, they were up 4.5% in the year to February at 30,651 tonnes.

It is undoubtedly an uncertain time for the British potato industry, with rising costs due to the Middle East conflict adding to the list of woes that include unpredictable weather, trade wars and greater global competition. However, the UK still requires the equivalent of more than seven million tonnes of potatoes a year and in an era of volatility producing more of those potatoes at home makes sense.

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