



Potato Section – Winter Meeting
Changes in Market Pressure



10th Feb 2009

Organisation structure

**A H Worth
Holding Co**

Looks after
'The Family Silver'

QVFOODS

Wholly owned
subsidiary of
A H Worth
Established 30 years
Potato specialist



The farming company

WORTH FARMS



- Accreditations:
 - LEAF Marque
 - Assured Produce
 - Assured Combinable Crops
 - Nature's Choice
 - Entry Level Scheme
- LEAF Demonstration Farm 1996

WORTH FARMS



- 2000 hectares of alluvial silt land
- 300 hectares Potatoes
- Piper 100 Ha, Marfona 100 Ha, Cara 40 Ha, Others 60 Ha
- A team of 13 including and led by - Farm Manager, Agronomist, Foreman and Accounts Clerk

Main crops (on a 6 year rotation)

- **Primary Crop - potatoes**
- **Secondary Crops - vining peas, wheat and sugar beet**
- **Rent land - salads, brassicas**

Organisation structure



QV Update

- Season 2008/9 will be c.260k tonnes
- Season 2009/10 will be c.360k tonnes
- Major customers Asda, Aldi, Iceland, medium retail and foodservice, PAS, McCain's, Kettle + others
- Growing 200 Ha
- Continue to expand our Holbeach site
- Proposed addition of the March site



QV Update

- Inspire
- Pseedco
- Prep business
- Import / Export business
- Processing
- Grading / Washing
- Owned Vegetable, Salads business
- TOTAL CROP MARKETING



Inspire

- QV controlled brand
- Suitable for purpose
- Appearance not as critical
- Varieties
- Economy on volumes
- Ease of placing on shelves
- Speed of introduction
- 'No Hassle' factor



QV introduce Gregg Wallace from Masterchef as the face of



Pressures

- Considerable, and getting worse
- Supermarkets / Residues
- Supermarkets / Comparative shopping
- Supermarkets / Variety exclusivity
- Supermarkets / Traceability
- Supermarkets / Protocols
- Processors – getting similar to supermarkets
- EUD 91/414



Residues

- FSA 'Name and Shame'
- Decreased detection thresholds
- Major Issue with detection
- Stated aims
- Consequence?
- Decreased pesticide use
- CIPC?
- Better targeted
- Stewardship



2nd PSD assessment (Dec 08)

Table 1. Potato pesticides likely to fail cut-off criteria post 5Nov vote. (endocrine related)

Pesticide	Target	Date of expiry
iprodione	Stem canker	2013
mancozeb ¹	blight	2015
Maneb ¹	blight	2015
linuron	Various weeds	2013
Pendimethalin	Various weeds	2013
metribuzin	Various weeds	2013
warfarin	Rat bait	2016

¹ contributes to anti-resistance strategy, often sold as mixture with other products, these would all be affected

Table 2. Potato pesticides likely to fail cut-off criteria post 5Nov vote (identified as hazardous / neurotoxic effect)

Pesticide	Target	Date of expiry
cypermethrin	Caterpillar / cutworm	2016
ethprophos	wireworm	2017
fosthiazate	PCN / wireworm	2013
Methiocarb ²	slug	2017
oxamyl	PCN / FLN	2016
pirimicarb	aphid	2017
Zeta-cypermethrin	cutworm	2018

² note: alternative product metaldehyde was withdrawn in September

Note: metam-sodium was also identified as a candidate for table 2. Although it is not a potato pesticide it is currently being trialled as a soil treatment (with properties similar to biofumigant crops) against PCN and wireworm

**Triologue
agreement to
develop better
risk
management
for table 2.
These would
join the list for
comparative
assessment**

Answers

- Changing chemistry of pesticides
- Better stewardship
- Different / better varieties
- GMO's ????????



Varieties

- Much potential
- Expensive
- Risky
- Targeted problems
- Greater knowledge
- BUT very difficult
- Good varieties been thrown out with bad



Variety Trends Top 30 Last 4 Years (Ha Grown)

Variety	2005	2006	2007	2008		
Maris Piper	24238	24353	25988	25246		▲
Estima	15474	15770	15440	12944	▼	
Maris Peer	6905	6641	6131	5874	▼	
Lady Rosetta	6797	6273	6047	5462	▼	
Marfona	4595	4667	4852	5130	▼	
Saturna	5033	4971	4905	4189	▼	
Pentland Dell	5191	5050	4713	4136	▼	
Saxon	3400	3997	4171	4120		▲
Hermes	3573	3263	4011	4003		▲
Markies	1403	1996	3507	3976		▲
Desiree	3558	3455	3862	3555		▶
King Edward	3452	4026	3887	3524		▶
Harmony	1537	2127	2387	2896		▲
Unidentified	1768	2628	1876	2793		▲
Nadine	4931	4024	3064	2214	▼	
Premiere	2082	2166	2234	2133		▶
Charlotte	2032	1944	1812	1883	▼	
Russet Burbank	3073	2426	2072	1776	▼	
Rooster	393	1029	1312	1710		▲
Melody	249	462	772	1599		▲
Cabaret	674	715	1020	1555		▲
Osprey	1870	1429	1465	1519	▼	
Wilja	1481	1546	1598	1458		▶
Cultra	1389	1347	1233	1433		▶
Maris Bard	1430	1451	1577	1220		▶
Sante	1668	1568	1561	1217	▼	
Accord	626	836	948	1138		▶
Victoria	973	1234	1171	1079		▲
Romano	1543	1245	1031	1001	▼	
Top 30 Total	113343	114645	116654	112791		
Total	125911	127249	130730	127136		

Varieties

- Current trends – skin finish, greens
 - Whites
 - Reds
 - K Edwards
 - M Piper
 - Salads
 - Organics
 - Process



Picking Varieties

- Exclusivity?
- Lead time
- Investment
- Get it wrong!!!



1	2	3	4	5	6	7	8	9
Malikins 45 25 Kg. PSCo	Arcade 45 25 Kg. Pk	Red Duke of York 30 25 Kg. H	Shades Express 30 25 Kg. H	Savannah 30 25 Kg. IFM	Harlequin 30 25 Kg. MBM	100. Ce	Sunrise 45 100. Ce	Highland Burgandy Red 30 Highland Burgandy Red 30
								Elzevir 15
								Purple Star 30
								AND 95-0903 15
								99.24.855 15
								NO 95-0132 15
								97.2.50.84 15
								Starre Gold TD 15
								Papayara (ARD 95-2221) 30
								VE 01-336 30
								LISANNE (AR 97-1339) 15
								AR 01-0845 30
								Celestine 30
								AR 09-0522 30
								CITIDEL (AR 96-580) 15
								AR 09-0522 30
								Mirage 30
								MUSTANG NO 95-242 30
								DW 95-83-7 15
								Gourmet 30
								Flora 30
								Andean Sunrise 30
								AR 00-690 15
								Skypal 30
								Rudolf (uk 93-01-02) 30
								GOURMANDE 15
								Lullie 30
								Madeline 45
								128 MPMA 06 15
								FL2065 30
								MA 96 419 30
								FL2030 30
								AR 01 0410 30
								FL2108 30
								Syngenta (Cont) 15
								Pakiro 30
								Syngenta (Fung) 15
								HZPC 00-2223 30
								HZPC 95-387 30
								HZPC 95-1007 30
								HZPC 00-1430 30
								KALI Chandrakulsi 15
								KALI Jayi 15

Each sq. 1.5m

GMO's

- 2007 - 114m Ha grown by 12m farmers in 23 countries
- Slightly better acceptance, but still a long way to go
- Need to have BALANCED / FACTUAL debate
* (now happening!! PCL, Radio 4)
- Advantages significant, broken into 3 parts



Advantages

- Agricultural Productivity

- Higher Yields
- Drought / water tolerance
- Pest / disease resistance



- Quality of Nutrition / Feed

- Increased vitamins etc.

- Plants as Green Factories

- Increased oils, amino acids etc

- Knowledge of what aiming for / how

- Speed of change

- John Innes 'Purple tomato'

- Dutch Starch – elimination of amylose in starch pots



Disadvantages

- Considerable consumer pressure
- Pressure groups
- Cost ?
- Biotech company control
- THE INDUSTRY / CONSUMERS ARE CURRENTLY NOT THERE
- **BALANCED** DEBATE?



Conclusion

- Security of Supply
- Minimising Residues
- Specific varieties for purpose
- ? Customer Exclusivity
- Secondary 'Fall Back'
- Multi use – all size sectors
- Suitable for purpose
- CONSIDERABLE CONFLICTS

