



Grower: are you willing to produce while losing money?

Gembloux, 25-11-2025

As already announced in our previous press release in September, Potato growers across the NEPG zone are about to face an exceptionally challenging period. Free buy prices are dramatically low – between 0,50 and 4,00 €/100 kg depending on countries, varieties and conditions, without any real interest from buyers – and processors have clearly announced that both contract prices and contracted volumes will be reduced for the 2026-2027 season.

Global NEPG zone production is expected to reach around 27,2 Mt, 10 % higher than in 2024.

The following table gives yield, area and production for the 4 NEPG countries. These figures are provisional and may be revised in the coming weeks.

EU-04 CONSUMPTION POTATOES (Excl. Seed and Starch)										
25 November 2025										
year	2019	2020	2021	2022	2023	2024	2025	actual vs 2024	5y-avge	2025 vs 5y-avge %
Countries NEPG										
Production (x 000 t) 5y avge	21.654	21.502	22.104	22.652	22.120	22.730	23.137			
Annual Variation	13,0%	3,8%	(3,3%)	(4,6%)	6,5%	6,9%	10,4%			
Total crop	22.649	23.502	22.722	21.682	23.094	24.683	27.242	10,4%	23.137	17,7%
BE - Belgium	4.406	4.335	4.249	3.962	4.428	4.357	5.009	15,0%	4.266	17,4%
DE - Germany	7.998	8.555	8.329	7.995	8.444	9.240	9.922	7,4%	8.513	16,6%
FR - France	6.536	6.915	6.895	6.045	6.863	7.711	8.471	9,9%	6.886	23,0%
NL - Netherlands	3.708	3.696	3.248	3.680	3.359	3.375	3.839	13,7%	3.472	10,6%
Hectareage 5y avge	461.253	475.755	494.068	502.886	508.356	513.753	524.488			
Annual Variation	4,1%	1,3%	(4,6%)	2,5%	2,3%	9,0%	6,8%			
Total	515.541	522.275	498.010	510.616	522.325	569.216	608.062	6,8%	524.488	15,9%
BE - Belgium	97.921	96.985	89.649	92.355	96.254	101.805	107.962	6,0%	95.410	13,2%
DE - Germany	186.000	189.700	183.060	189.000	191.910	210.000	220.000	4,8%	192.734	14,1%
FR - France	152.720	158.590	153.913	152.590	158.677	178.918	197.000	10,1%	160.538	22,7%
NL - Netherlands	78.900	77.000	71.388	76.671	75.484	78.493	83.100	5,9%	75.807	9,6%
Yield (t/ha) 5y avge	47,1	45,4	44,9	45,3	43,8	44,6	44,3			
Annual Variation	9,9%	2,0%	0,6%	(5,5%)	3,1%	(2,7%)	4,5%			
Total	44,5	45,4	45,6	43,1	44,4	43,2	45,2	4,5%	44,3	1,9%
BE - Belgium	45,0	44,7	47,4	42,9	46,0	42,8	46,4	8,4%	44,8	3,7%
DE - Germany	43,0	45,1	45,5	42,3	44,0	44,0	45,1	2,5%	44,2	2,1%
FR - France	42,8	43,6	44,1	39,2	43,3	43,1	43,0	(0,2%)	42,7	0,8%
NL - Netherlands	47,0	48,0	45,5	48,0	44,5	43,0	46,2	7,4%	45,8	0,9%

In this context, every grower must ask themselves a crucial question: can they afford to take the economic risk of maintaining their current potato acreage, or should they consider a reduction ? !

Market forces are unforgiving, and “only the fittest will survive”!

A combination of factors has led to the very bad current situation.

Early plantings in good conditions, a 7% extension of hectareage and a 5 % increase in yields, combined with globally enough rainfall (though much less in the South and much more in the North) has led to a 10% higher harvest. On the demand side, a contraction in the global frozen fries market (due to a combination of “Trump tariffs”, a strong euro vs the US dollar, increasing sales of processed products from China, India, Egypt, Turkey among other emerging French fry producing countries) have led to this difficult situation.

Frozen chips exports: China and India increasing, EU-27 decreasing

Over the past two seasons, China and India have multiplied by 10 their export of frozen chips to their neighbours. Current volumes are largely higher than 500.000 t. Meanwhile, EU-27 exports have gone down for the second consecutive seasons.

Can you afford to lose a lot of money while producing potatoes at the same scale?

There is no indication that the competitiveness issues affecting the European market of frozen French fries will be resolved in the short term. Potato growers must carefully consider if it is economical viable to continue growing potatoes on the same scale and with so high annual renting costs!