

The season of 2013 - 2014 ... a potato market of extremes

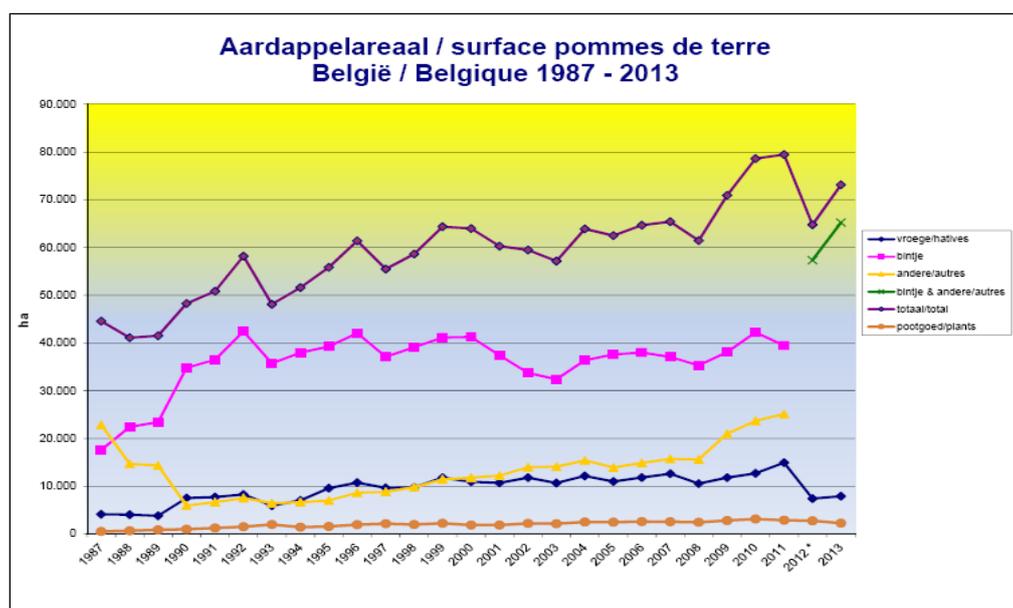
The unforgettable season of 2012 – 2013, with astronomically high prices on the free market as a result of the reduction in the European potato acreage and the failed harvest in some parts of Western Europe (above all in the United Kingdom) experienced an unexpected transition to the new potato season of 2013. Throughout Europe, the cold spring of 2013 and summer holding off led to the new season being delayed by some three weeks. Since the small potato harvest had prematurely rounded off the 2012 - 2013 season on the free market, the failure of the new potato harvest to appear led to increased demand both on the fresh market and in processing and thus to high prices (once again). In June, the Belgapom quotation rose to an absolute record height of € 350/tonne.

The transition to the new storage season of 2013 – 2014 was also far from perfect: heavy rainfall leading to flooding in Central Europe and above all Germany pushed the markets into an uncertain position that reminded the sector of the previous season.

During and shortly after the harvest period, the free market once again achieved high values (Belgapom quotation of October € 150/tonnes), but starting from January 2014 the market started falling sharply to end way down (Belgapom quotation of May € 50/tonne).

The reason for this can perhaps be found in a sharp increase in the contractual production of potatoes for processing (the share on contractual production for the fresh market had already been particularly high for years). On the other hand, the purchasing behaviour of packaging, trading and processing companies had also changed since the previous season.

In the end, the underestimated yield / availability of potatoes in Germany and the absence of an increase export demand (the borders of Russia remained closed for consumer potatoes for phytosanitary (and political?) reasons) ensured that there was no remaining impetus to push up the free potato market again in the 2nd half of the season.



Potato acreage

Belgium 1987-2013

Early
Bintje
Others
Bintje & others
Total
Seed potatoes

The fact that the Belgian potato acreage had already recovered slightly after the fall of 2012 – 2014 perhaps also played a role in this.

A record number of potato acres for the season of 2014 – 2015

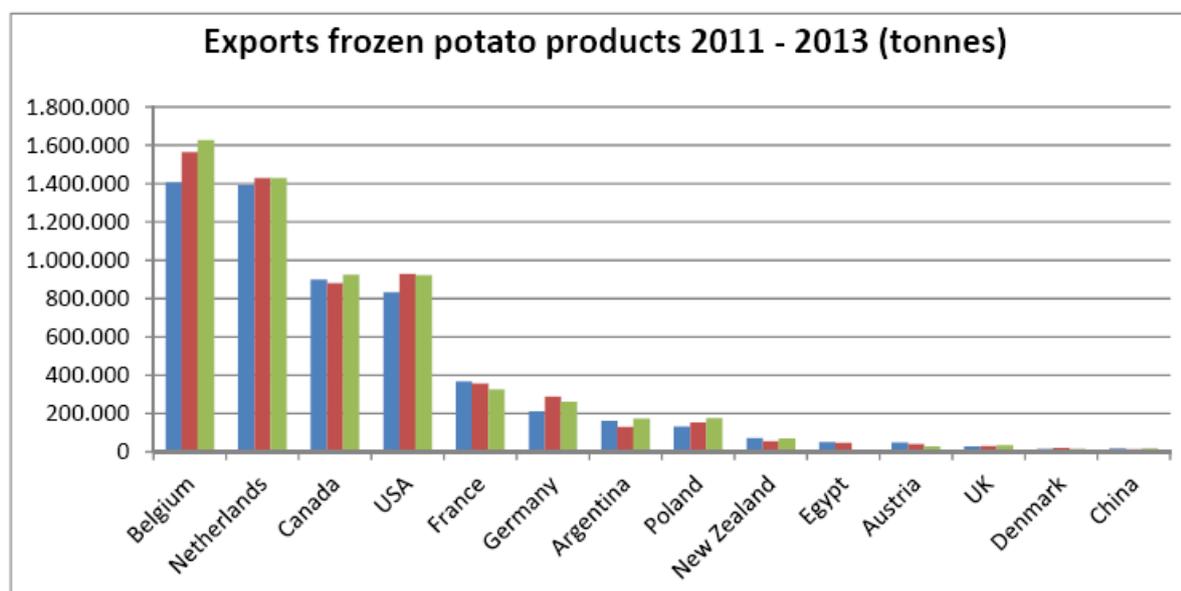
In the spring of 2014 various sources speak of a sharp increase in the potato acreage in most of the European potato-producing countries.

Thus the NEPG expect the surface area in the 5 top potato-producing countries (NL/B/F/UK and D) to increase by 2.7%. In the UK, a 2% decrease is expected compared to 2013, but an increase of 6.3% is expected for Belgium, leading to 81,000 ha: an all-time high.

The ideal plant and growth conditions of the spring and the first months of summer furthermore led to optimism with regard to yield and quality. But the markets tended to react negatively to these messages: for the small part of the free market for early potatoes for processing into frozen fries, at the start of the early season the Belgapom quotation was only € 50/tonne and the falling trend continued. The futures market also fell below € 100/tonne for its April 2015 quotation.

High potato prices in 2013 - 2014 not without consequences

The effect of the extremely high potato prices on the free market for one and a half years cannot be underestimated however. Thus, for the first time in two decades the Belgian potato-processing sector did not see an increase in the number of tonnes of processed raw material despite the record investments made in 2013. It is clear that a (partly) more expensive raw material had to be balanced with the selling prices even if this occurred on a highly competitive global market. This led to shifts in the export flows of frozen potato products. Nevertheless Belgium still remained the largest exporter of these products in the world in 2013.



On the other hand, the GfK figures for family purchases (commissioned by VLAM) led to a number of surprising observations: the home consumption of fresh potatoes fell sharply, whilst the price per kg in the shop evolved to unknown heights (especially during the early season of 2014).

It is clear that this price increase, perhaps accompanied by more efficient purchasing behaviour by the consumer (with an eye to avoiding food loss), has had a major impact on the consumption of potatoes.

In the meantime, history has shown that the effect on consumption such changes have is not cancelled out after one or two seasons.

The Belgian potato sector resolutely opts for sustainable growth



The Belgapom board that was renewed in 2013 – together with the secretariat – immediately took the bull by the horns by resolutely opting for a new approach.

The sharp growth of the Belgian potato-processing industry and the consumer's demand for new dynamics in the area of the fresh market led Belgapom to propose a new total project at its general assembly of June 2014.

With the title: *“together for sustainable growth”* Belgapom invites the entire chain to offer the potato sector that is bursting apart at the seams a solid foundation for future generations. The shift from the large share of a volatile free market to a more stable market with a larger share of production contracts (both for trade and for processing) is to form a sturdy foundation for this.

To add force to this campaign, the topic was also set to the top of the agenda of the next international trade fair of the potato and vegetable chain Interpom Primeurs.

Participating companies will be given the opportunity to focus the spotlight on their sustainability campaigns by means of a ‘sustainability route’ that the visitors will be offered and that will be made visible on the stands.

Interpom Primeurs is a Belgapom initiative which will be held from 23 to 25 November 2014 in Kortrijk XPO.



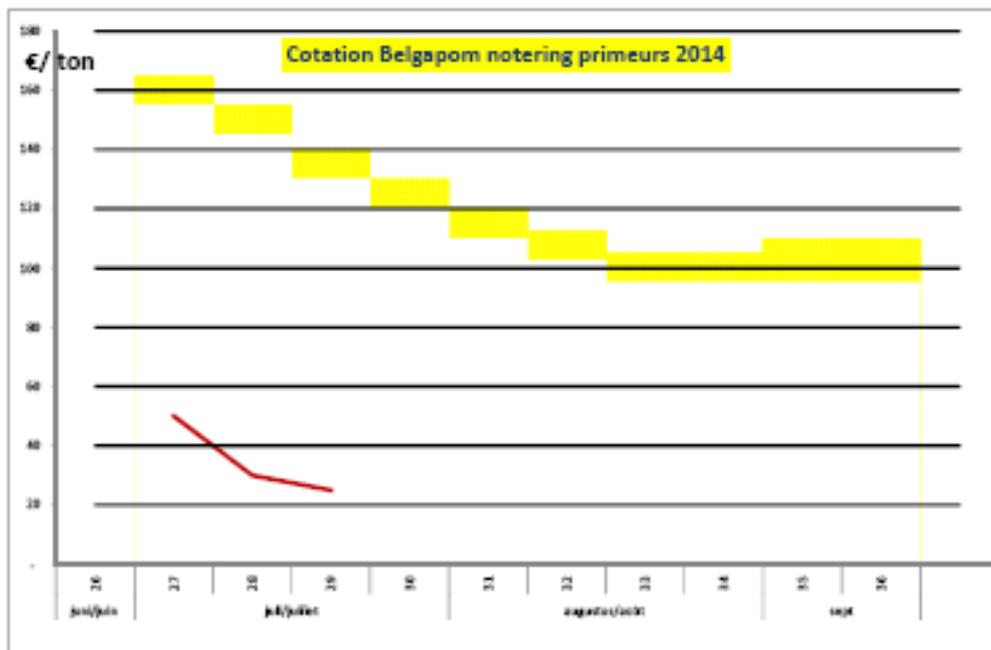
A better presentation of the raw material prices thanks to the Belgapom quotation

As of the new potato season of 2014, the new presentation of the Belgapom quotation which will show both the weekly free market price and the spread of contract prices for the current season, should contribute to a more correct picture of the prices both amongst professional buyers and in the media.

To this end, a short and a long version of a statement was elaborated; both of them will be communicated via the Belgapom website (under Belgapom quotation) and via the weekly quotation itself.

The visualisation of the weekly Belgapom quotation in the form of a graph contains both the line of the weekly quotation and an overview of the spread of the contract prices for the same reference period both for the quotation of early potatoes and that of the Bintjes season.

This should also lead to more transparency in the potato chain that is often characterised by great volatility in the free market, with all the accompanying media interest, whereby the contract market is not taken into account.



Belgapom is also actively working to achieve further correct market transparency for the entire potato chain. In addition to the weekly Belgapom quotation of the most common price for Bintje/early potatoes destined to be processed into frozen fries, and the observation of the other varieties that are traded on the free market as a raw material for the frozen industry, there is also the weekly PCA and FIWAP price fork on Tuesday mornings.



Finally, Belgapom has also pledged its cooperation to POMMAK, a project to provide an online overview of the transactions of free potatoes in Flanders and Wallonia. Both producers and/or processing companies can enter (all) their transactions which can then be confirmed by the buyer/seller by text message or email. This project is supported by the Flemish and Walloon regional governments and besides Belgapom has the following partners: Boerenbond, ABS, FIWAP and PCA. We have to wait and see whether the

operators will actually make use of this tool that is being placed at their disposal.

Various projects with an eye to sustainable growth



Central to this project are the various research projects to which Belgapom and its companies have granted their active cooperation. Several of these projects were initiated by the Ministry of Health and are related to so-called quarantine organisms catalogued by Europe (nematodes, potato wart disease, epitrix).

In addition, Belgapom itself has taken the lead in a number of projects with an eye to the sustainable growth of a high-quality raw material. It concerns three projects that will be/have been approved in the course of 2014 for co-financing:

* **Ipot**: this project in cooperation with VITO, CRA-W and ULG, was approved by Belspo and wants to offer a web-based application to link parcel data from precision agriculture to satellite or drone observations.

In this way the production can be followed and measured more closely with a higher crop yield as the end goal.

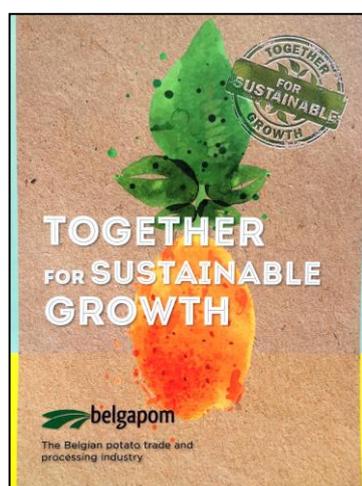
* **Reskia**: this project in cooperation with PCA/Inagro was submitted to Flanders' Food and wants recognition from the IWT. The aim is to stimulate low-residue storage of potatoes in our country. Improvement of and alternatives for existing techniques are being tested on the Belgian varieties for the fresh market and processing.



* **A phytophthora resistant Bintje**: this is a project of the VIB, ILVO and the University of Ghent that Belgapom wants to participate in together with Boerenbond. The aim is to use cisgenesis to place the genes of phytophthora-resistant potato varieties in the Bintje so that the use of crop protection agents can be spectacularly reduced during production. For this it is important that the production and marketing of this variety is in the hands of producers and buyers and not with multinational companies. If the project goes smoothly, it should be possible to cultivate the first



resistant Bintjes in 2021/2022.



For the occasion of the **EAPR conference**, the three-yearly conference of the European potato research sector that was held in Brussels in July 2014 and for which Belgapom was the platinum sponsor, Belgapom is sparing no expense on communication (image and brochure in Dutch, French and English) for this sustainable growth project.

This communication is also being presented at the Belgapom stand at the next edition of Interpom Primeurs in Kortrijk (November 2014).

The stand will be characterised by opting for sustainable growth and the campaign for 'potato products from the country of fries'.

“Potato products from the country of fries”

What is more, Belgapom also wants to focus on the unique image of Belgium as a producer of potato products. No one can deny that our country can be called the country of fries. And this is not about in which country fries were first invented, but about where a real culture of eating fries developed. And that is definitely the case in Belgium. Nowhere else in the world is a people so associated with fries (in addition to chocolate and beer).



This is more than ever the case now that the three official language communities of Belgium have recognised the “chip shop culture” as intangible cultural heritage (procedure rounded off in Flanders on 14 January 2014 and still pending in the French and German speaking communities).

The presence of a chip shop museum (Bruges), the chip shop in various comics (such as Jan Speer’s chip shop in the Nero comic albums), the fries revolution during the difficult negotiations for a Belgian national government in 2011 and of course the perception of young and old when eating our typical Belgian fries are an illustration of this.

What other country besides Belgium can boast an annual week of the fries?



One of the main reasons for the success of Belgian fries is perhaps the variety that for many years has determined their flavour: the Bintje. Even though this variety will be 110 years old in 2015, it remains typical for delicious Belgian fries: crunchy, not too long, not too thin, golden and ... delicious.

So we no longer speak of ‘French fries’, but call them the “*real Belgian fries*”.

Belgapom wants to depart from this unique perception to also put the unique nature of the potato products from our country on the global map: after all, they are products “from the country of fries”.

In 2015 Belgapom will offer various instruments to give shape to this message at international level:

* **Iconic book about the Belgian potato sector:** is being published in Dutch, French and English, and will be launched at the opening of the **World Exhibition in Milan** (May 2015), that is being organised with the theme ‘feeding the world, energy for life’.

Belgapom is also planning to actively put the spotlight on the fries industry in the Belgian pavilion at this event.

* **Campaign picture, joint export folder and website:** at the same time, a campaign picture, export folder and website will also be launched, that should help the Belgian companies that are active in the processing and export of frozen potato products to strengthen their image worldwide.

Towards a new quality project for the fresh market



Since 1999, the quality of potatoes in shops has been determined by the Royal Decree on the trade in new and storage potatoes, the FASFC being charged with inspection of its compliance.

It is clear that this assignment is not a priority in the package of tasks that the general food safety agency has.

Today it comes down to the fact that – apart from a number of provisions on traceability and

labelling – agreements with regard to quality are increasingly the terrain of suppliers and buyers. Belgapom can agree with this, but prefers clear and uniform agreements, especially with regard to the minimum quality.

Consultation with the regions authorised for quality and the FASFC have taught us that these government bodies absolutely do not object to a quality regulation that is determined within the chain by the participants.

Comeos (the distribution federation) confirms that the retail sector is willing to collaborate on a quality system for fresh potatoes.

Under the Belgapom umbrella a working group was set up consisting of a number of packaging companies that in the course of 2014 will elaborate a proposal for an internal regulation for the minimum quality of fresh potatoes in Belgian shops. In the next phase, this draft will be discussed with the buyers and further elaborated.

FVPhouse event on the prevention of food waste in the AFV sector



The joint FVPhouse event following the general assemblies of Belgapom, Vegebe and Fresh Trade Belgium on 17 June 2014 was held at the Montil in Affligem.

Coincidentally, the first match of the Belgian Red Devils in the World Cup in Brazil was also scheduled at the same time. So the programme was brought forward an hour to give participants the opportunity to afterwards watch the match live on a large screen. The fact that Algeria was beaten 2-1 made the closing reception an even bigger party.

However, after the general assemblies of Belgapom, Vegebe and Fresh Trade Belgium under their articles

of association, the focus was on the joint FVPhouse event on the prevention of food waste in the fruit, vegetables and potato sector.

After global player Unilever's vision of this subject and an overview of the initiatives already developed by the government and the private sector at national and international level presented by Nele Cattoor of the FVPhouse secretariat, the following debate showed that various companies and sectors already have their own interpretation of this definition. It became clear that pressure to prevent food waste will only increase. Belgapom and its companies also plan to further invest in this approach.



FVPhouse: a whole range of activities

With the foundation of vzw FVPhouse in 2012, the participating trade associations Belgapom, Vegebe and Fresh Trade Belgium were able to organise even better and more efficient operations. F(ruit) V(egetable) & P(otato) house offers a back office for these three federations and their members.

FVPhouse also offers the *training courses* (Qfor certified) and operation of *Young FVPhouse*, a meeting place for our sector's managers of tomorrow.

A new FVPhouse board

After the replacement of Antoon Wallays and Dirk Decoster, the chairmen of Belgapom and Vegebe respectively, their successors Marc Seru (Belgapom) and Bernard Haspeslagh (Vegebe) also took their places as the new deputy chairman and treasurer of FVPhouse respectively. The new chairman is Frank Van Colenberghe, who is also the chairman of Fresh Trade Belgium. Romain Cools remains a director and is responsible for the day-to-day management of the secretariat and the team.

Various courses

In 2013 - 2014 FVPhouse offered various courses. A brief overview:

* **Restore project** (05/06/2013): the power station of the future, demand driven for industrial consumers. By means of "demand response", companies can be temporarily shut down in case of peak demand for electricity. This project was set up by Restore, in cooperation with Belgapom, Vegebe and the federation of frozen warehouses.

During a closing session on 26 May 2014 in Affligem, an overview was presented of the successes and possible problems of this project. The results show that this cooperation really can lead to a win/win situation for major energy consumers.

Companies from the AFV sector who still had doubts could register to make their contribution as the 'power station of the future'.



* **Seminar on tare soil & the prevention of food loss** (22/10/2013): the engineering firm M-tech was commissioned by Belgapom and Vegebe to carry out a study on the legal nature of the soil adhering to potatoes that can be returned to agriculture by the sector in Flanders and Wallonia. The results of this study were explained. In addition, an overview was given of the current government initiatives with an eye to the prevention of food waste.

* **Seminar on bacterial diseases in potato production** (28/01/2014): Johan Van Vaerenbergh (ILVO - Merelbeke) provided an overview of the evolution of the

main bacterial diseases in potato production. The seminar was rounded off with a new year's reception.

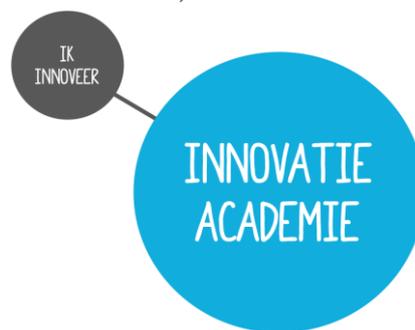
* **Food defense** (26/06/2014): companies that export to the USA must have a Food Defense plan. At the seminar Eva Moens explained how such a plan is drawn.

* **Innovation academy**: in cooperation with the Flemish innovation centre, the Lieten cabinet and UNIZO, FVPhouse organised an innovation academy in Kortrijk.

The FVPhouse secretariat was able to call on a trainee to prepare this academy.

Cedric Van Rensbergen set up the course and organised a survey on innovation in the AFV trade and processing sector to prepare for the course that consisted of 5 sessions.

In addition to an inspiration session (03/02/2014), in the spring of 2014 15 young participants from our Belgian AFV companies took an interactive course that will allow them to make active use of the innovation toolbox. Innovation forms the foundation of the further sustainable growth of our companies, hence FVPhouse great interest in this topic.



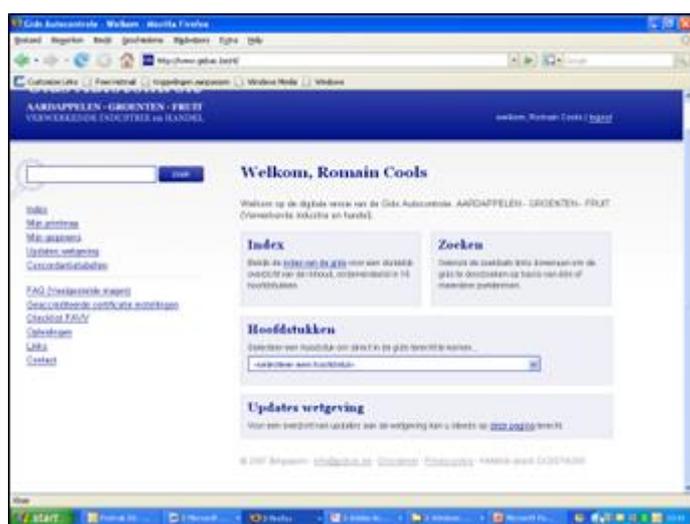
* **RUCIP expert course** (22/02/2014). The Belgian RUCIP experts were given a theoretical (secretary of the Belgian RUCIP committee, R. Cools) and practical (expert Yves Capoen) course, so that they too can meet the conditions for being placed on the Belgian list of RUCIP experts.



* **IPM and phytosanitary licence course** (20/03/2014). During an information session, Annie Demeyere of the information department of the Flemish Ministry of Agriculture informed the Belgapom members of the new IPM directive (that can be complied with via the new Vegaplan standard for Belgian producers) and the obligation of operators in the food chain to have a phytosanitary licence

* **Self Checking Guidelines AFV-trade and processing training:**

Belgapom's Self Checking Guidelines AFV trade and processing is a living entity that is thus regularly updated. In addition, companies or new employees can constantly take courses that are organised by FVPhouse for them.



Thus in May/June 2014, 15 participants took a 5-session course for trade and processing in Sint-Niklaas.

During a training session, some 20 participants were given an overview of the updates in the latest version of the guide on 3 June 2014 in Nazareth. On the same day, 5 ICIs also took a course about the updated version of the guide.

In the meantime, in June 2014 the latest version of the Self Checking Guidelines was presented to the FASFC for validation. It is expected to be approved in the 2nd half of 2014.

Changes to the guide are made on the website www.gidsac.be or www.guideac.be

Perhaps a new basic training course for the guide will also be organised in the autumn of 2014.

Young FVPhouse, where the managers of the AFV trade and processing of tomorrow feel at home

FVPhouse also forms the framework for the operations of Young FVPhouse, in which young entrepreneurs and managers who are active in the companies of Belgapom, Vegebe and Fresh Trade Belgium can meet each other. In Belgium, a visit to Termote Vanhalst was organised in the spring of 2013. It is a company that is at the global top with regard to stock management. In the autumn of 2014 a visit will be organised to the renewed distribution platform of Delhaize in Zellik.



Belgapom in a European (potato) context

Belgapom is an active member of the European potato processing associations (EUPPA) and of the European potato trade (Europatat), for which it has provided the secretariat for years in the '90s and 2000s.

When the 50th anniversary of **EUPPA** was celebrated in 2013 and the new secretariat was launched in Brussels (under the chairmanship of Kees Meijer, with Adriana Nosewicz as secretary-general) the operations of the various working groups was focussed on in the 2013 – 2014 season.



The **trade** working group viewed the trade opportunities / restrictions for frozen products on the global market within the framework of the bilateral trade agreements that are negotiated by the EU. Naturally, the coordination of the dossier on the trade conflict with South Africa formed the lion's share of the work of this committee.

The working group also prepared EUPPA's participation in the joint potato conference with Europatat, ESA and Copa Cogeca to be held on 9 September 2014 in Brussels.

The *sustainability* working group focussed on the food waste dossier, the sustainable use of crop protection agents, the BREF update, the carbon leakage list until 2020 and the dossiers on water consumption and packaging.

The *food law* working group above all focussed on the acrylamide and 3-MCPD dossier, the issue of compulsory origin labelling. In addition, it also worked on the dossiers on contaminants (lead and chlorate), additives and endocrine disruptors.

During the general assembly on 14 and 15 May 2014 in Brussels, an initial proposal was also presented for joint communication within Europe about potato products. In addition, World Potato Markets gave a presentation on export opportunities for processed potato products in the next few years.

Representing Belgium, Antoon Wallays is a member of the board of directors of EUPPA and Romain Cools is chairman of the committee of directors and secretaries of the national federations. He also covers the 'trade' working group within the secretariat, whilst Nele Cattoor covers the 'sustainability' and 'food law' working groups.

Europatat, the federation of the European potato trade also had something to celebrate in 2012 with its 60th anniversary, but in this federation it is clear too that the organisation's age is not causing it any problems.



During the past year, the following topics were focussed on: market organisation, promotion potato consumption, food safety, sustainability, phytosanitary policy, reproduction materials, trade policy and RUCIP.

Here, too, there are various committees that are active:

* *packaging company committee*: the following topics were discussed by the committee, that met on 5 February (Berlin) and 24 May (Brussels):

- consumer trends in the various countries
- consumer signposting in the UK (Kate Cox)
- promotion initiatives in the Netherlands and France and the renewed EU promotion policy of DG Agri and the school fruit campaigns (and possibilities for the potato sector)
- opportunities for the potato as part of a healthy diet
- food waste (an ad hoc working group is being set up)
- Acrylamide – guideline for communication for packaging companies
- the European potato production in 2014

* *seed potato committee*: this committee also met on both 4 February (Berlin) and 22 May (Brussels) to discuss the following topics:

- guest speakers Henk van de Haar (NAK) and Jörg Rénatus (Europlant) gave their opinion of the impact of the new EU seed potato marketing rules (directive 2013/63/EU) on the seed potato trade
- new legislation:
 - o common measurements for basic and certified seed potatoes (directive 2014/20/EU)
 - o common measurements for pre-basic seed potatoes (directive 2014/21/EU)
 - o changed references for the 'High Grade region' (decision 2014/105/EU)
- Update on 'Smarter rules for safer food' package Plant Reproductive Material Plant Health
- market access: Russia / Belorussia: rules for season of 2014 and prospects for the next season

- joint event with COPA COGECA, ESA and EUPPA on 9 September 2014 in Brussels.

* **early and storage potatoes committee**: met on 22 May 2014 in Brussels to discuss the following points:

- presentation on the role of trade in the changing landscape of the processing industry (Dick Selhorst – Aviko)
- evaluation of the 2013 – 2014 season and prospects for 2014 – 2015 season
- export of consumer potatoes to Russia and Belorussia
- prospects of the sugar market following the termination of the sugar quotas (F. Brandenburg ASSUC)

* **technical and legislation committee**: met on 22 May 2014 in Brussels to discuss the following points:

- guest speaker: Fiona Hopkins EU Commission plant health on the state of affairs with regard to the EU legislation concerning organisms that harmful for potatoes
- overview of the EU plant health, official inspection and organic legislation
- CAP: application regulations (inc. greening)
- contaminants: cadmium, disinfection and crop protection agents

* **RUCIP** committee: no meetings in 2014.



Following the general assembly on 23 May 2014, there was a well attended plenary session with the title 'heading towards 2020' with the following guest speakers:

* Eric Poudalet, Director Food Safety, EU Commission, DG SANCO, on the policy of his department that is important for the potato sector;

* Joeri Van den Bergh, Insites Consulting - 'How Cool Brands Stay Hot. Branding to Generation Y'

* Virginie Pernin, GIRA

Foodservice - Trends in the European Foodservice market.

During the general assembly, representing Belgium, Jos Muyshondt was re-elected as a member of the board of directors. Peter Van Steenkiste is chairman of the packaging companies committee.

Belgacom and Social Corporate Responsibility (CSR)

Belgacom continues to support the Conpapa development project in Ecuador



After Belgacom presented a cheque for € 10,000 to TRIAS at Interpom Primeurs 2012 to support the Conpapa project in Chimborazo, Ecuador,

this small potato cooperation in the Andes was further supported with advice and action.

Thus a delegation of Ecuadorian farmers visited our country. Marcel Delamillieure, who is actively following this project on behalf of Belgapom, accompanied them during various company visits. Improved production techniques were also focussed on via Boerenbond and the VVP.

The delegation visited the Moespom company in Moerzeke and the field trials for the seed potatoes in Merelbeke.

During a Trias mission to our country, the new manager of Conpapa, José Manuel Aushay Tuquinga, was presented with a cheque for € 6,000 by Rémy Tanghe to buy storage crates. It was Rémy's father, Rik Tanghe (also a board member of Belgapom), who did a sponsored walk to Santiago de Compostella deed to collect money for this project.



In the meantime, it was also agreed to continue to support this project in the coming years and cooperation with the Torhout Rotary department Rotary was set up for this.

In this way Belgapom also tries to contribute to corporate social responsibility for its members.

Belgapom helps SMEs obtain a CSR sector passport

Society's and clients' demand for sustainable products are increasing.

In cooperation with Unizo and consultant Sliding Doors, in 2013 Belgapom started an **ESF project on corporate social responsibility (CSR)**. A sector passport is being set up as a guideline for companies who draw up their own sustainability report. The sector passport is first being implemented at the pilot companies Pomuni Trade, Potato Masters and Warnez. In addition to a number of preparation meetings, a stakeholder consultation is organised twice to integrate the vision of operators up and downstream in the chain. NGOs are also involved in the project. The results will be presented at a seminar in the autumn of 2014.

Belgapom continues focus on quality in the entire potato chain

The potato sector is a particularly competitive sector, in which companies from trade and processing plot their own course. Where possible, Belgapom tries to actively form a bridge between the various links in the potato chain with an eye to a stronger position for our dynamic companies on the domestic market and our export-oriented trading and processing companies.

Belgapom's choice to depart from the topic of 'together for sustainable growth' perfectly illustrates this approach. Quality and constant sector innovation form the basis of this sustainability project.

The new Vegaplan standard: Belgian AFV products first in the world to be certified for sustainability and IPM

Belgium is the first country in the world where a quality standard with certification scheme not only incorporates quality, food and plant safety and the environment, but also sustainability and the application of the new European IPM directive (integrated pest management).

Dozens of sustainability specifications of retailers and multinational food companies were used to define the sustainability section; the requirements were catalogued by the University of Ghent. The requirements that apply to the primary production link were then incorporated in the Vegaplan specifications and checklist. It is Gisèle Fichet who handled this project within the Vegaplan team in cooperation with various employees from trade associations and companies.

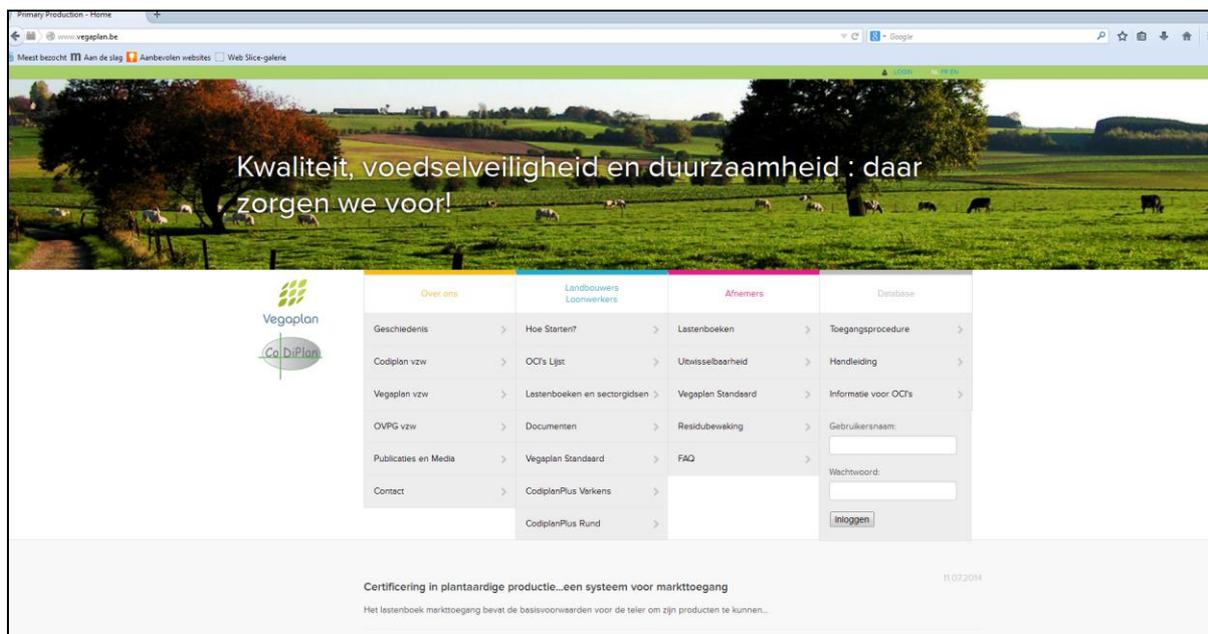
The fact that the IPM obligation was also integrated is the result of Vegaplan's consultations with the responsible departments of the Flemish and Walloon regions. Thanks to the Vegaplan certificate, the agricultural and horticultural companies will no longer be subjected to additional inspections for their compliance with the IPM directive. The Vegaplan standard thus not only leads to 'market access', but thanks to recognition by the FASFC (in as far as all the other activities of the agricultural and horticultural company are also covered by the AC primary production guidelines) also to a lower levy and inspection frequency by the FASFC, and the lack of IPM inspections by the regional governments.

The new Vegaplan standard was launched at the end of 2013 and the first agricultural and horticultural companies were certified in June 2014 under this standard. After three years, the entire database of Vegaplan certified companies has proven to work in accordance with the requirements, as a result of which the Belgian raw material excels in the area of quality.

The new standard replaces the former ICQM standard, since for international buyers it was not always clear what the letters IKKB, GIQF or ICQM stood for.

In addition, Vegaplan, in cooperation with Codiplan, has launched its totally renewed website (www.vegaplan.be), where both the primary production sector and buyers from trade and processing can quickly find their way.

For potatoes, the Vegaplan standard remains interchangeable with the Dutch Food Safety Certificate for potatoes and the German QS. The idea is that growers in Belgium, the Netherlands and Germany can be certified with their own standard and can circulate their potatoes freely within these three countries. Raw materials from other countries may meet the requirements of one of these standards or are subjected to additional requirements (e.g. additional sampling and analysis within the framework of the Self Checking System of the buyers).



For the Belgian potato sector (and the members of Belgapom), Belgapom's sector sampling plan (contaminants and brown rot/ring rot) applies. The sampling plan has been validated by the FASFC.

Companies that are not members of Belgapom must take care of their own sampling plan on the basis of an own risk analysis.

In order to have all the growers become active within Vegaplan (the Vegaplan standard provides 'market access' for certified growers and their products), the suppliers of packaging companies and/or the processing industry will also have additional conditions imposed by their buyers. That is why a number of companies oblige their dealers-suppliers of potatoes to obtain a Self Checking certificate on the basis of the Belgapom Self Checking Guidelines AFV trade and processing. In this way the entire chain is covered with regard to quality requirements and traceability. After all, it is not feasible for these SME trading companies to achieve a BRC or IFS certificate.

Vegaplan is managed by the Agrofront (Boerenbond, ABS and FWA) and the OVPG (consultation platform for buyers of vegetable products and raw materials). Antoon Wallays is the chairman of Vegaplan, whilst Romain Cools is the chairman of OVPG.

Working towards international recognition of the Vegaplan standard

As of today, the standards Vegaplan (Belgium), QS (Germany) and Food Safety Certificate arable farming/potatoes (Netherlands) have already been declared equivalents.

To further strengthen international exchange, there are consultations twice a year via the A-net, an informal platform of these three partners, supplemented by the UK (Red Tractor), Austria (Amalgap) and Switzerland (Swissgap).

In the second half of 2014, Vegaplan will work intensively to have the standard recognised internationally. To this end there are intensive consultations with GFSI (Global Food Safety Initiative) and Globalgap.

The return of Brigitta Wolf to the Vegaplan team (she took care of the declaration of equivalency of Vegaplan and QS, before she moved abroad for family reasons for a while), should also help to make this important step possible.

Belgapom sets its shoulders to various chain projects with an eye to quality, transport and sustainability

It must be possible to deliver our potatoes and potato products all over the world. Sustainable, efficient and affordable transport is crucial for this. After Belgapom, together with Vegebe and POM West-Flanders worked out a project on multimodal transport of frozen products to Northern Italy, in 2012 the VIL project ‘**Transpharma express**’ started.

The project focussed primarily on the connection between Flanders and the Far East. Antwerp



– Chongqing, the largest urban agglomeration in the world and one of China’s production hotspots was used as a stepping stone. Together with the other

partners, it was examined how the transport of fresh and frozen AFV products by train using the route via Russia, former CIS countries to China offered possibilities. Cooperation with the customs departments was central to this.

At the closing event on 27 May 2014 it was concluded that this rail connection really does offer an alternative to other means of transport. Now it is a matter of making it economically feasible for the future.



For Belgapom and its companies, research and development are important drivers for sustainable growth. Belgapom was therefore proud to be a “platinum sponsor” for the triennial conference of the European association of potato researchers, the **EAPR**. This event, with over 400 participants from all over the world, was held under the chairmanship of J.P. Goffart from 7-11 July 2014 at the Crown Plaza hotel in Brussels.

Belgapom secretary Romain Cools was also a member of the organising committee and the presentation of the various projects which Belgapom takes part were presented during presentations and poster sessions.

They enjoyed a lot of interest from visitors the international science community.

The Flemish and Walloon research institutes PCA/Inagro, CRA-W, VITO, ILVO, VIB, University of Ghent and others, this was an opportunity to explain their projects and organise exchanges with other researchers.

At the closing event Erwin Wuyts, chairman of Belgapom’s processing section, called on scientists to more than ever focus on innovation and research. The next edition of this event is planned for Paris in 2017.

For Belgapom, “working within the chain” is not merely empty talk. Cooperation with the primary production link is very important for achieving the objective of sustainable growth.

That is why Belgapom, together with Syngenta and Interpom Primeurs, has once again organised the **Inno Potato Award** in 2014. Various partners from the chain and research actively cooperate in this competition that will present the 3 Flemish and 3 Walloon laureates to the visitors of Interpom Primeurs. Together with a professional jury, they will select the winners of this prestigious prize. The laureates will receive their prizes from the Flemish and Walloon Ministers of Agriculture on Tuesday, 25 November in Kortrijk XPO.

To further follow up all the projects at the primary production link level and give shape to the cooperation with Vegaplan, a **cultivation working group** was set up under the Belgapom umbrella. This working group consists of producers who are active both on the fresh market and in processing. The chair of this working group was entrusted to Bart Dhaeyere (Pomuni).



Belgapom was also a guest at the **annual general meeting of the PCA** in Audenarde on 28 January 2014, where the presentation by general secretary Romain Cools – in which he referred to the ‘yellow

leader’s jersey of the Belgian potato processing sector and the accompanying responsibility of the entire ‘pack’ – was above all picked up on by the Dutch media.

Production, prices, consumption, import and export ...

Prices of raw materials: increase in contractual production ... highly volatile free market

The higher yield in some EU countries compared to the initial estimates, the lack of export to Russia and other markets and the higher cover of the market by contracts ensured that there were record prices on the free potato market during the 2012-2013 storage season and the 2013 early season; in the course of the storage season a reversed trend was even apparent.

At the end of the 2013-2014 season, floor prices were even listed for the Belgapom quotation, that continued on the free market of early potatoes for processing.

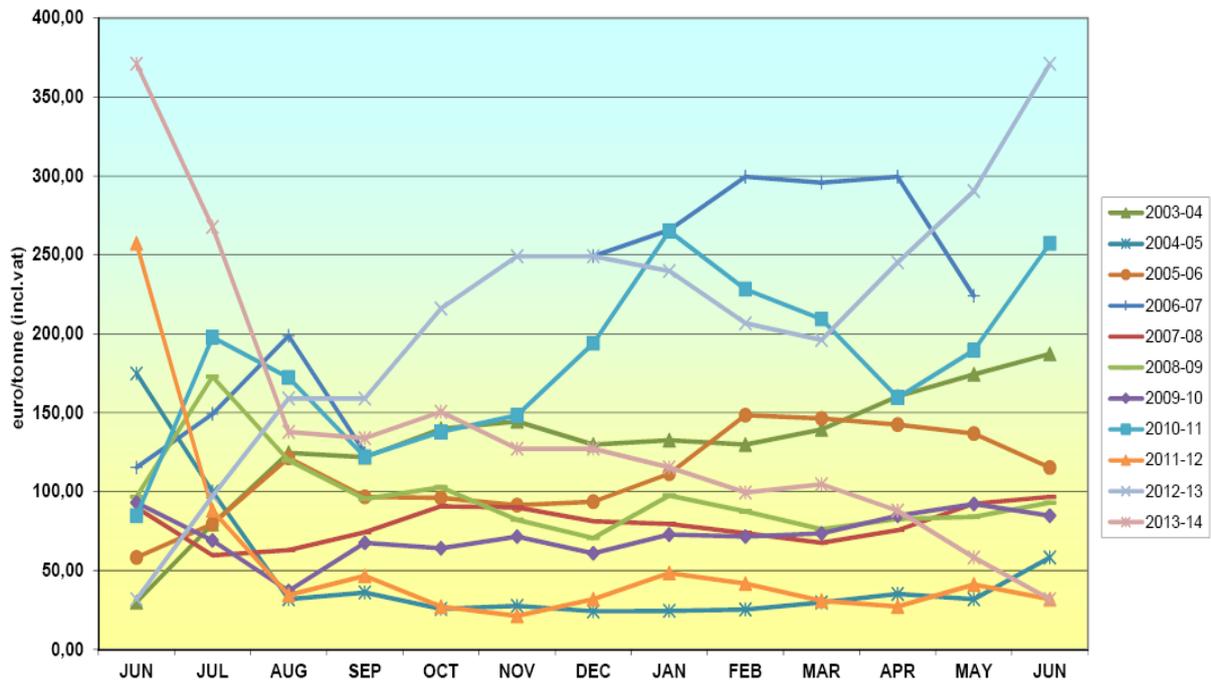
This once again illustrated the great volatility of the free potato market.

The Belgapom price for Bintje or early potatoes is the most commonly used price observed on the previous working day for machine-harvested potatoes of the variety in question for processing into frozen potato products, field crop 35 mm+, suitable for fries, ex producer, in bulk on the lorry, for immediate delivery/collection.

The Belgapom quotation is determined by a committee with 4 representatives of the processing section and 4 representatives of the trade section of Belgapom.

The Belgapom quotation is also part of the cash settlement price of the European futures market for potatoes that has moved to Frankfurt (Eurex).

Belgium free market potato prices bintje/early potatoes 2003-2014



There is a particularly high risk that these free market prices will become even more volatile in the next few years. On the other hand, their share in the total potato price will presumably decrease further, especially if the greater share of contractual production in the potato sector continues to grow.

It is to be expected that as a result of the rising share of contractual production in the potato sector, in case of a lot or little demand for free potatoes the price will rise and fall more sharply relatively speaking.

Why more contracts in potato production?

Professional potato production companies are becoming ever larger and the cultivation of potatoes is part of the rotation system with cereals, corn, industrial vegetables, sugar beets and other arable crops.



Both the potato producers and their buyers increasingly dread running enormous risks due to the high volatility of the free potato prices and seem to have opted to sharply increase their share of contractual.

Even if there are no official figures, it is still estimated that the share of the contractual production of early potatoes for processing is already between 80 and 90%. Some 60 to 70% of the storage potatoes for processing into potato products are already assumed to be contracted.

For some time now, more than 4/5 of the production of potatoes for the fresh market (both the storage harvest and the new potatoes) has been covered by contracts.

It is clear that the share of the free and contacted potatoes can vary from one operator in the chain to the next.

This is also the reason for the supplement to the graph of the weekly Belgapom quotation with the overview of the contract prices, so that a more correct picture can be provided of the actual cost of the raw material at cultivation level.

For the sake of information: a few years ago Belgapom - together with Agrofront - actively cooperated on drawing up a contractual reference framework under the control of the Ministry of Economic Affairs (contractual agriculture committee). We were the only sector in Belgian agriculture and horticulture to finalise this project and have the government and the federations involved communicate it.

Belgium biggest importer of potatoes and biggest exporter of frozen potatoes in the world!

The steady growth of the Belgian potato processing industry (from 500,000 tonnes of raw material in 1990 to over 3.6 million tonnes in 2013) was partly aided by the export of frozen potato products and potato snacks.

It is above all due to frozen products that the share of destinations in third countries constantly increases. The growth of the economy in other parts of the world led to the increase in dining out in these countries and fries are often on the menu.

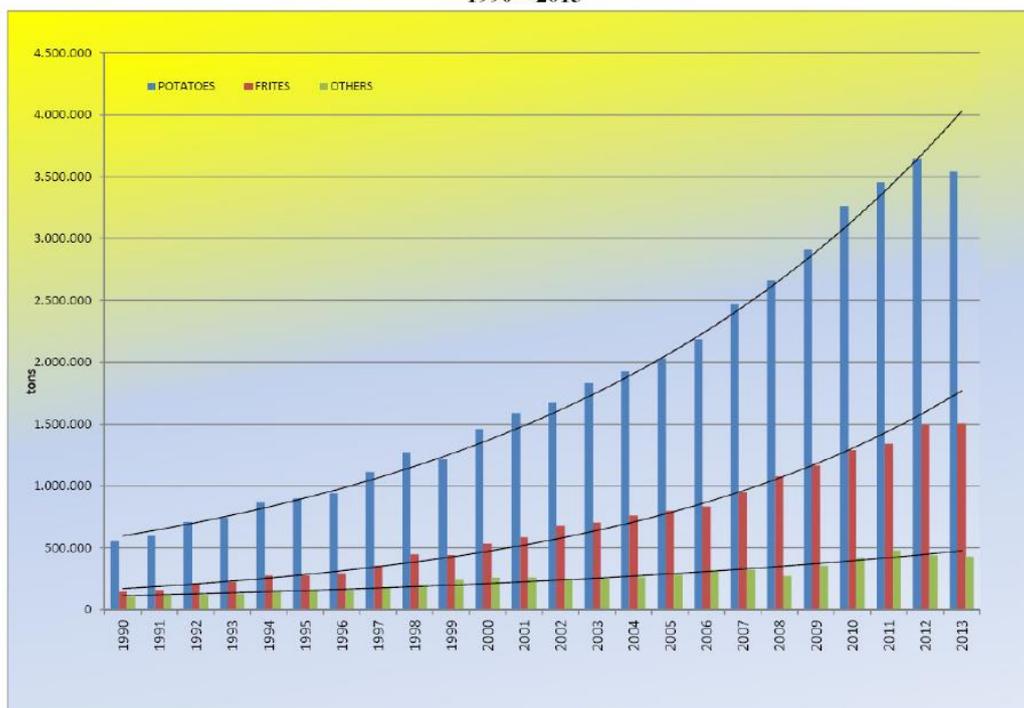
In 2011, Belgium overtook the Netherlands as the biggest exporter of pre-cooked frozen potato products. Despite the slight fall in production in 2013 (partly as a result of the more expensive and rarer raw material) this leading position remained in place that year for export (see graph on page 2).

But Belgium also leads the way in the area of the export of potato snacks (crisps, etc.).

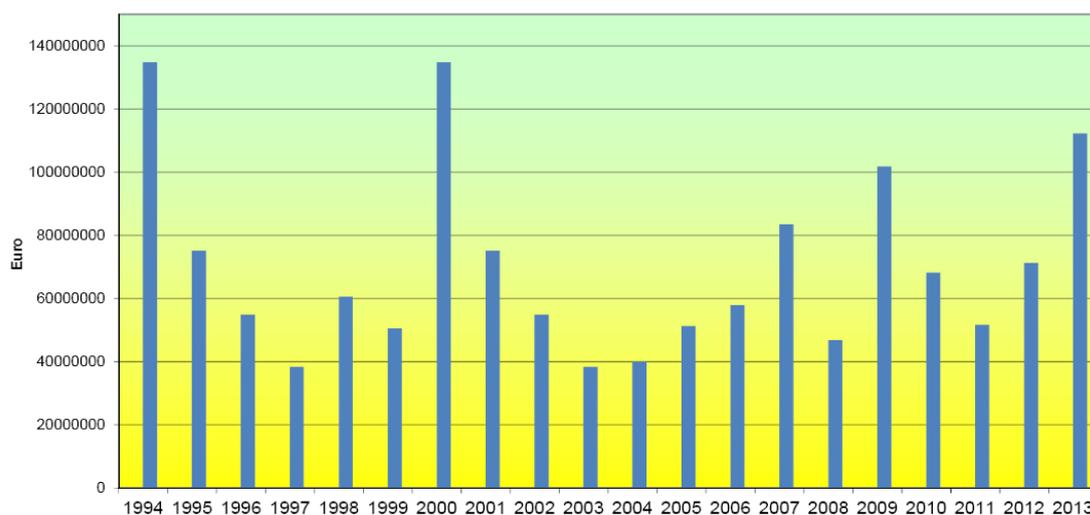
As expected, the impact of the more expensive and rarer raw material in 2013 led to a limited fall in the Belgian production of potato products (in total 3,539,103 tonnes of potatoes were processed compared to 3,644,355 tonnes in 2012). This is historic, as after all it is the first time since the end of the nineteen eighties that the tonnage of processed potatoes in Belgium did not increase.

Some people thought that this would be a turning point for the growth of potato processing in Belgium, but the spectacular increase in investments of the processing companies in the sector have shown that this is perhaps not a structural phenomenon.

The Belgian processing industry from 1990 – 2013



Belgian potato processing industry investments 1995 - 2013



In 2013 the sector was confronted for the first time with the impact of protectionist measures by certain countries. This showed that neither the EU, nor the WTO can act efficiently quickly. A protection clause, followed by an anti-dumping investigation by South Africa, increased import duties in Brazil and import restrictions in Ecuador clearly affected the export of frozen potato products from Belgium negatively. We are trying to remove this threat to our sector in cooperation with EUPPA and DG Trade of the European Commission.

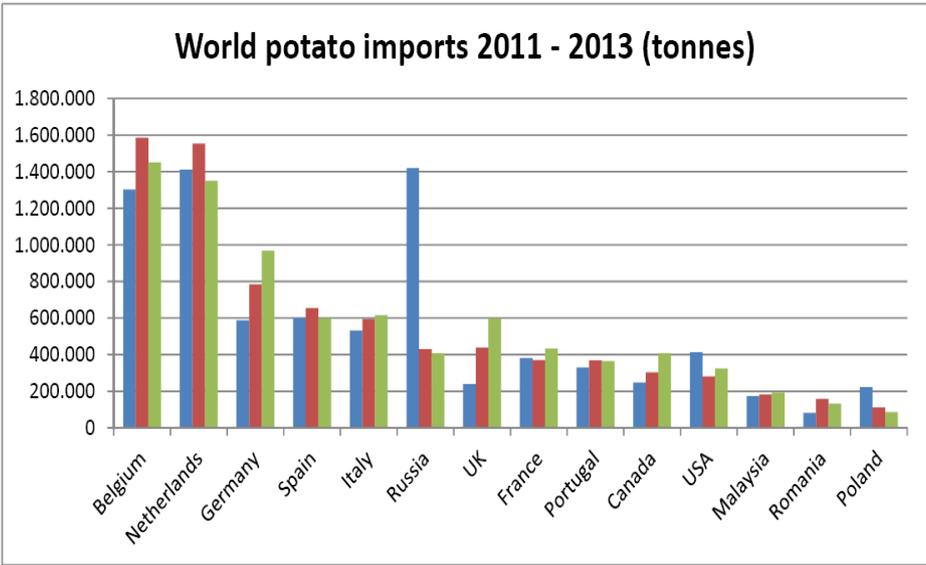
Nevertheless the sector continued to focus on export, where the growth of third (non-EU) countries in the total share of export destinations continues to grow.

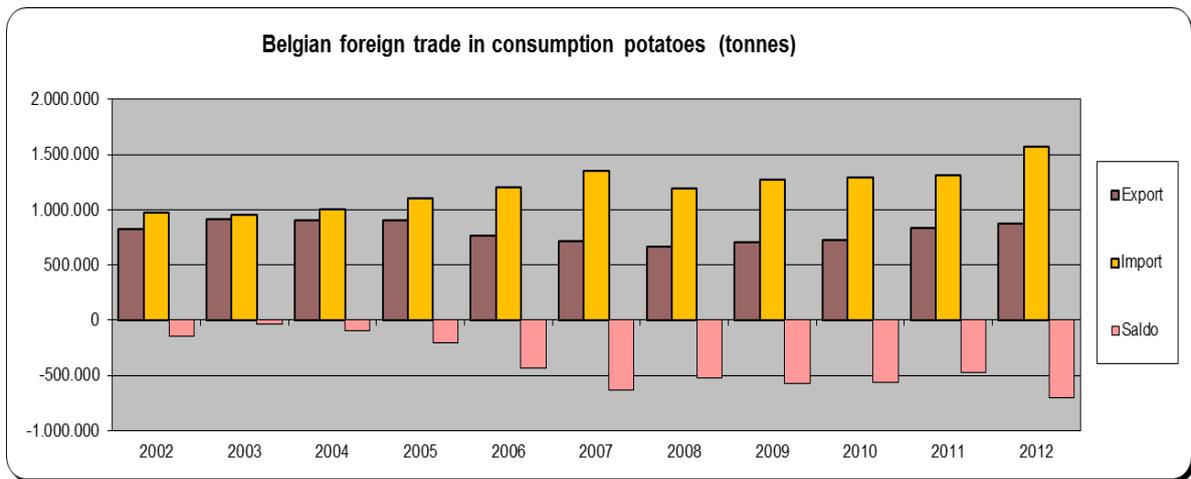
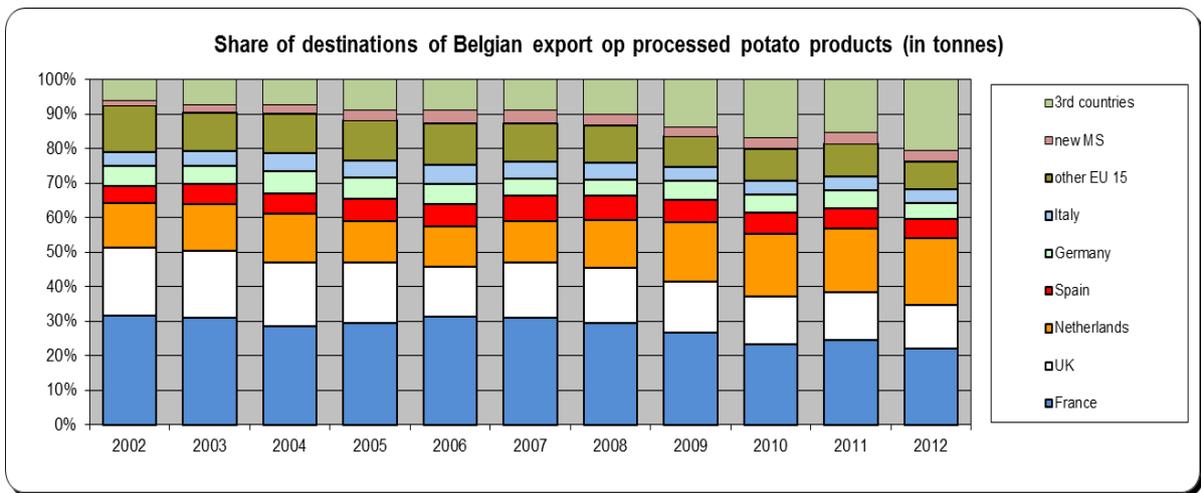


On the other hand, in 2013 Belgium remained the world’s largest importer of potatoes. This is not surprising considering the concentration of processing companies – often along the borders with the Netherlands, France and Germany – and Belgium’s location in the middle of the European potato belt. The imported potatoes come primarily from France, the Netherlands and Germany and are above all destined for processing. Belgium also imports early potatoes for the fresh market, mainly new potatoes from Israel and Cyprus.

Belgium is also a leading exporter of fresh potatoes, in the first instance to the neighbouring countries, but apart from that mainly to Southern and Central Europe as well as destinations overseas.

The fact that the export of consumer potatoes to Russia has been stopped for several years already for political reasons has a baleful effect on the functioning of the free potato market.





Source: NIS/Eurostat/VLAM.

The export of consumer potatoes remains a concern for Belgapom. Through the export working group, promotional initiatives are set up and the cooperation with the FASFC and the regional bodies (VLAM, FIT, AWEX) to continue to facilitate the export of potatoes in the future remains a priority. A lively potato market by means of a dynamic trade in potatoes offers a solid foundation for the sustainable growth of all the links in the potato chain.

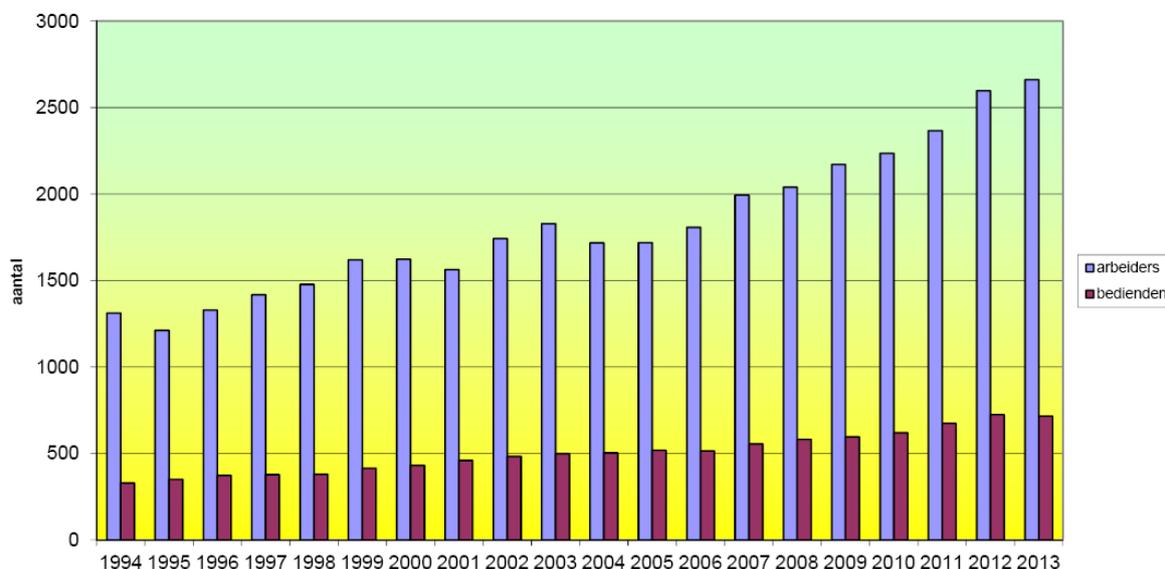
Within FVPHouse, Veerle Van der Sypt became responsible for the import and export section for all the AFV products and relations with the FASFC, within which a new approach to export dossiers and certification is being elaborated.



Belgapom also endorses the campaign of the Belgian food federation 'Food.be – small country, great food', in which the food industry due to its rich and high-quality range of products wants to do everything possible to grow even more sharply in the next few years.

In the meantime, the food industry in Belgium has already become the most important sector as far as employment is concerned. Belgian potato processing has also played its part in this as is apparent from the graph below.

Belgische aardappelverwerking - Tewerkstelling 1994-2013



Belgian potato processing - Employment 1994-2013

x-axis: number

y-axis: year

blue bar: blue-collar workers

dark red bar: white-collar workers

The fact that “Food.be” is also focussing on further export growth is music to the ears of Belgapom and its companies. “Food.be” wants to use the World Exhibition of Milan in 2015 as a lever to achieve more export in cooperation with the regional export departments FIT and AWEX. In addition to chocolate and beer, the Belgian potato processing sector will also have to actively contribute with its fries.

Belgian home consumption of potatoes is affected by higher prices in 2013

Fresh potatoes remain the accompaniment par excellence for meals at home with a volume share of 66%. They remain ahead of frozen processed potatoes, dry pasta, dry rice and fresh processed potatoes.

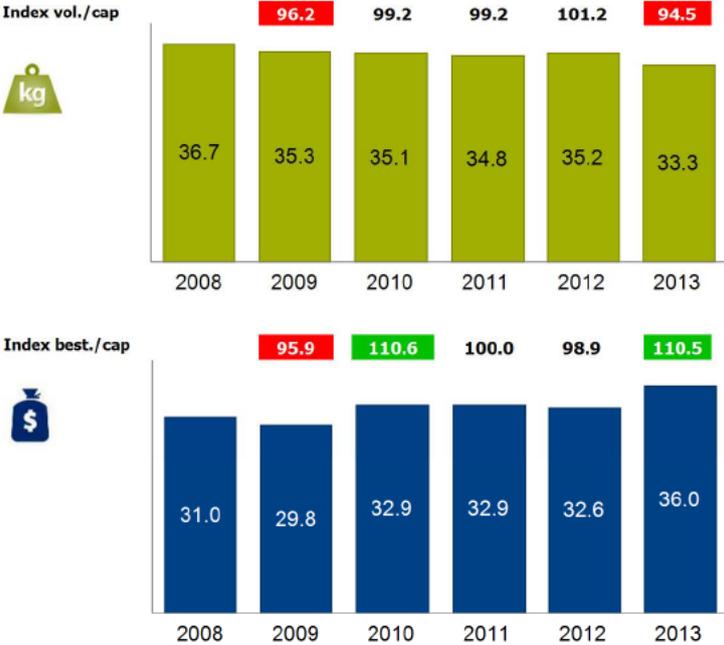
The volume share of fresh potatoes is falling however. Home consumption of fresh potatoes fell in 2013, after a good season in 2012, from 28.0 in 2012 to 26.2 kg per capita (-6.4%) in 2013. This fall can be seen in all the age categories, but least amongst the under 30 (-1.1%), the group on which the VLAM potato campaign is focussing. As a result of the high average price, the amount of money spent did rise by 17% to 23.3 Euros per capita.

The share of pre-packed versus bulk remained stable at 90%. Packs of 5 kg remain by far the most popular with a share of 55%.

After an increase a few years ago, the share of Belgian potatoes seems to be stabilising at 77%. DIS 1 (the hypermarkets and bigger supermarkets) remain the main purchasing channel with 40% of the volume, followed by the hard discounters (Aldi and Lidl) with 24%.

This is apparent from the figures of market research agency GfK Panelservices Benelux that was commissioned by VLAM to examine home consumption amongst 5,000 Belgian families.

According to these GfK figures, in 2013 the home consumption of potatoes in Belgium was up to 33.3 kg/year/capita, which represents a 5% decrease. On the other hand, turnover increased by 10%. This shows that during 2013 potatoes become more expensive which clearly had an impact on consumption. The decrease in Flanders was greater than the national average.



The fall in volume is greatest in the older target groups which are the biggest consumers. The younger target groups are offering better resistance, except families with children with limited income, which once again illustrates that the exceptionally high prices have an impact on the consumption of fresh potatoes.

The fall in the consumption of fresh potatoes is even stronger than that of processed potatoes as is

shown in the graph below. The penetration and purchasing frequency are also down.



Home consumption of frozen processed potatoes remained relatively stable during the past few years. In 2013 we ended up at 5.6 kg, which is down a little compared to 2012. This is slightly surprising since the price increase in this segment was almost non-existent.

After the stagnation of 2012, fresh processed potatoes that had been rising sharply during the past few years were no longer growing.

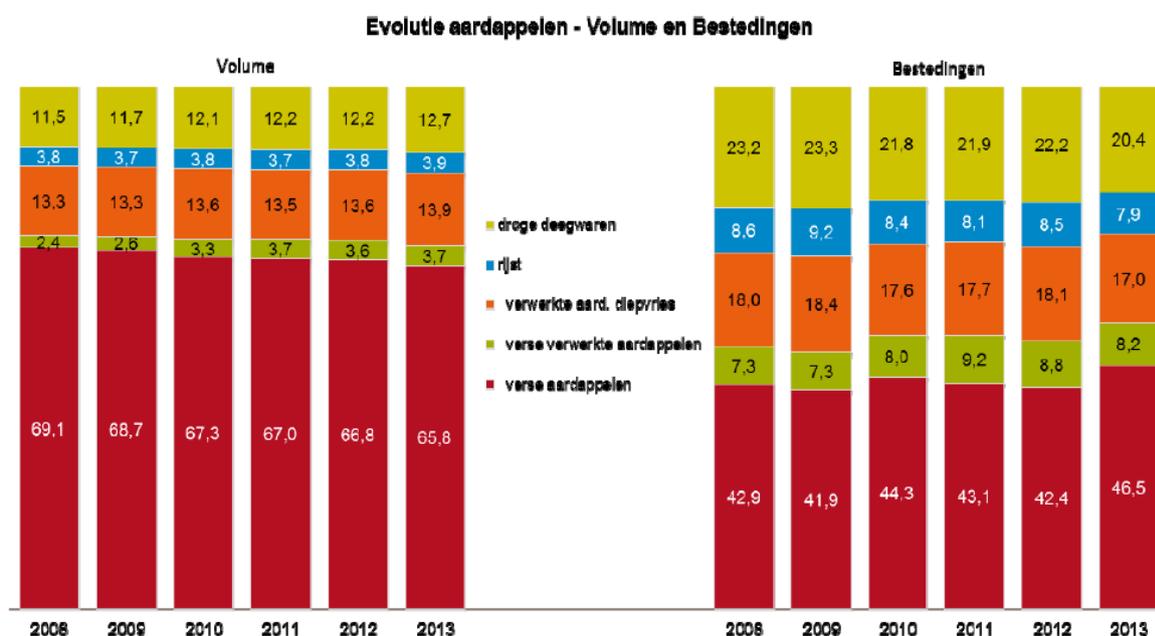
Here, too, just like for the frozen products the prices seem to rise less than on the fresh market.

Market share:

Fresh potatoes continue to have the largest share of meal accompaniments in terms of volume with 66%.

The share of dry pasta experienced slight growth, rice remains stable. In 2013 it is noticeable that the share of money spent on fresh potatoes rises sharply whereas the share of all the other meal accompaniments seems to fall.

The consumption of bread as a possible meal accompaniment has been characterised by a falling trend during the past few years.



Evolution in potatoes - volume and money spent

Volume

Money spent

Dry pasta

Rice

Frozen processed potatoes

Fresh processed potatoes

Fresh potatoes

Youth appreciate the potato

The fall in potato consumption is not as clear in all the age categories. It is noticeable that the 30-year olds only buy slightly fewer potatoes, namely -1.1% compared to 2011.

Young singles and younger couples are precisely the target group of the potato campaign that VLAM is conducting. In the communication VLAM emphasises the contemporary nature of a rather everyday product such as the potato and the young consumer discovers that potatoes can be prepared quickly and can be used in all kinds of cuisine.

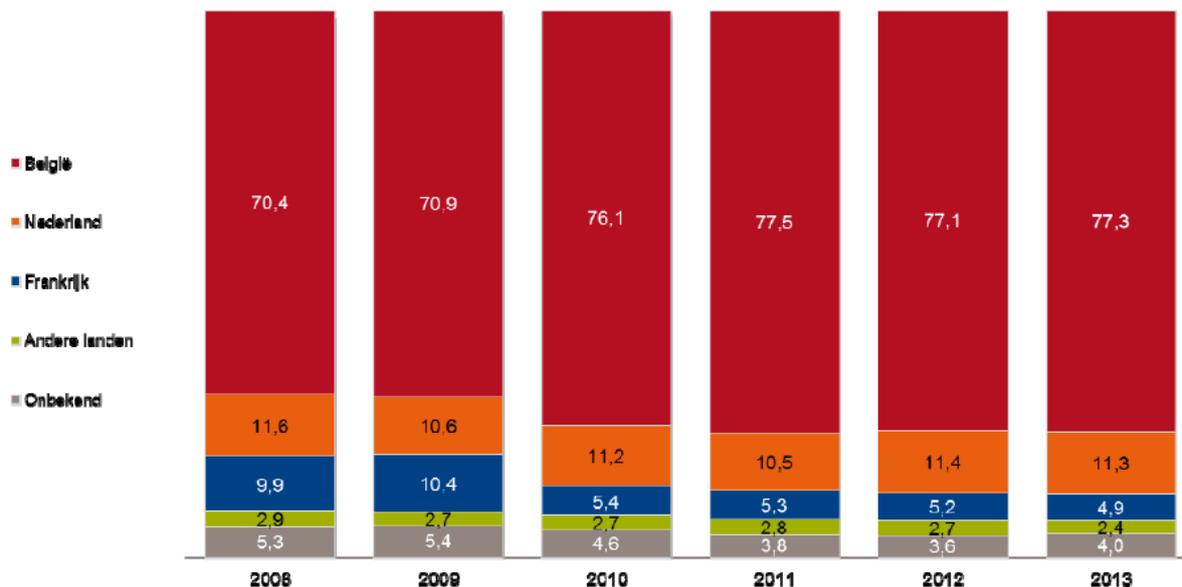
The potato campaign for young people, the “BOEMPATAT” campaign received two awards. It was awarded a prize for the best commercial by a professional jury on VMMA’s TV Day (25/03/2014) and named as the best youth commercial on SBS’s Identify Youth (05/06/2014).

Origin:

Origin is not one of the most important purchasing criteria for fresh potatoes but it has gained in importance during the past few years. We can also see this evolution in the market share of

Belgian potatoes. At the beginning of the years '00 it was falling sharply: from 88% in 2000 to 70% in 2007.

Consumers' growing interest in Belgian products means that supermarkets are making more efforts to offer Belgian potatoes. The Belgian potato sector is also making an effort to treat the domestic market as a preferred market. Since 2007, the share of Belgian origin has once again risen to 77.3% in 2013.

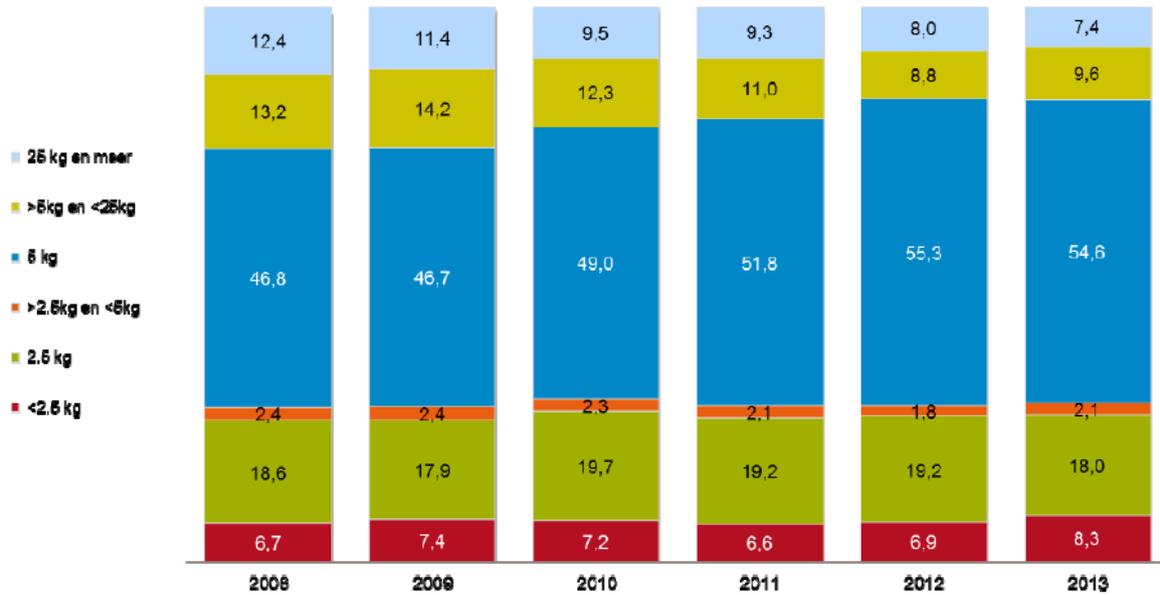


Belgium
 Netherlands
 France
 Other countries
 Unknown

Packaging:

The 5 kg and 2.5 kg packs saw a slight decrease. This is above all to the advantage of the smaller packs (as a result of the higher prices), that experienced remarkable growth. Perhaps the prevention of food waste also plays a role in this. It is remarkable that the share of packs smaller than 2.5 kg was above seen to grow at the hard discount. Logically, the price increase could be felt hardest for the 5 kg packs.

Evolutie verpakkingsgrootte verse aardappelen - Volume



Evolution of pack size of fresh potatoes - volume

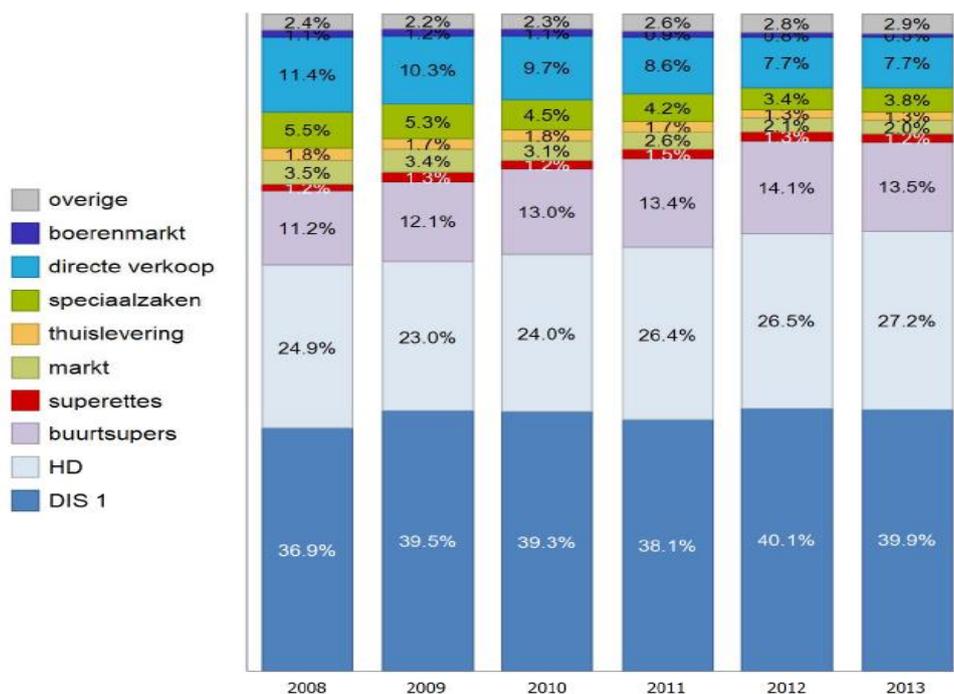
- 25kg and more
- >5kg and < 25kg
- 5kg
- >2.5kg and < 5kg
- 2.5kg
- <2.5kg

Varieties:

Bintje remains the potato variety purchased the most in Belgium, Nicola is the second most important variety and Charlotte completes the top three. These three varieties are also almost the only ones that the average Fleming knows; the variety being a less important purchasing criterion for the Fleming. The type (waxy, mealy, for fries) scores higher in this respect and after appearance and the weight of the pack is the third most important purchasing criterion.

Shop share:

As far as the sale of fresh potatoes is concerned, the hard discounters are slowly gaining ground.



- Other
- Farmers' market
- Direct sales
- Specialty shops
- Home delivery
- Market
- Mini-supermarket
- Local supermarket
- Hard discounter
- DIS 1

Promotion for fresh potatoes in Flanders and Wallonia



For years, VLAM in Flanders and APAQ-W in Wallonia have conducted the promotion policy for fresh potatoes. After a few successful campaigns in several countries with the support of the European Commission and a transitional year in 2012, VLAM submitted a campaign proposal to Europe that only applied

to Flanders (in view of the restructuring of APAQ-W Wallonia was unfortunately unable to participate in the project).

This campaign – that focussed on the promotion of fresh potatoes amongst target groups that are known as low users – was also selected by the European Commission DG Agri and started in the autumn of 2013 with its first part: **'de boempatat'**. By means of a striking TV commercial, promotional offers in the major Flemish student towns and banner on social media, students were invited to make their own potato dishes at their digs.

The TV commercial drew quite a lot of media attention and ensured that this VLAM campaign received a number of awards which resulted in a load of additional media space.



Fresh potatoes still constitute 66% of the purchased volume of ‘meal accompaniments’ in Belgium, far ahead of processed potatoes (17%), dry pasta (13%) and rice (4%). The share of fresh potatoes does vary greatly from family to the next. Thus for the over 65 it is still 74%, whilst for the under 40 it is only 59%. Amongst young singles fresh potatoes only have a 52% share.

That is why VLAM is focussing its potato campaign on the group where the share of fresh potatoes is the lowest, namely 18 to

45-year olds. The campaign above all wants to offer inspiration for those subgroups within the group of 18 to 45-year olds where potato consumption is even lower. After the students in digs in 2013 (“de BOEMPATAT”), in 2014 is broadening its campaign with the new titles ‘Patat d’amour’ and ‘Patatti incognito’. The umbrella slogan is ‘The potato. At home in any kitchen.’ This potato campaign shows that you can prepare delicious and surprising dishes with potatoes and that this does not have to take much time. In addition to TV commercials there are also inspiring new recipes each year, an activation campaign and online advertisements. All the campaigns refer to the recipe site www.aardappel.be.

In Wallonia, the project [Terra Nostra](#) received continued support. All the Belgian producers, packaging companies and processing companies can participate in this label through the specifications.

As said above, the promotion policy in Wallonia was largely paralysed by APAQ-W’s lack of a new vision for the future. In the meantime, the outlines of a new promotion department are clear: the idea is to above stand out by placing the spotlight on home-grown products. The question thus arises whether the cooperation between Flanders and Wallonia that has a rich tradition in the potato sector, can be further developed in the next few years.



VLAM also provides support for the export sector. Thus in 2013 – 2014 the export companies were offered stand space at the European AFV fair Fruit Logistica in Berlin (February) and Potato Europe in Emmeloord.

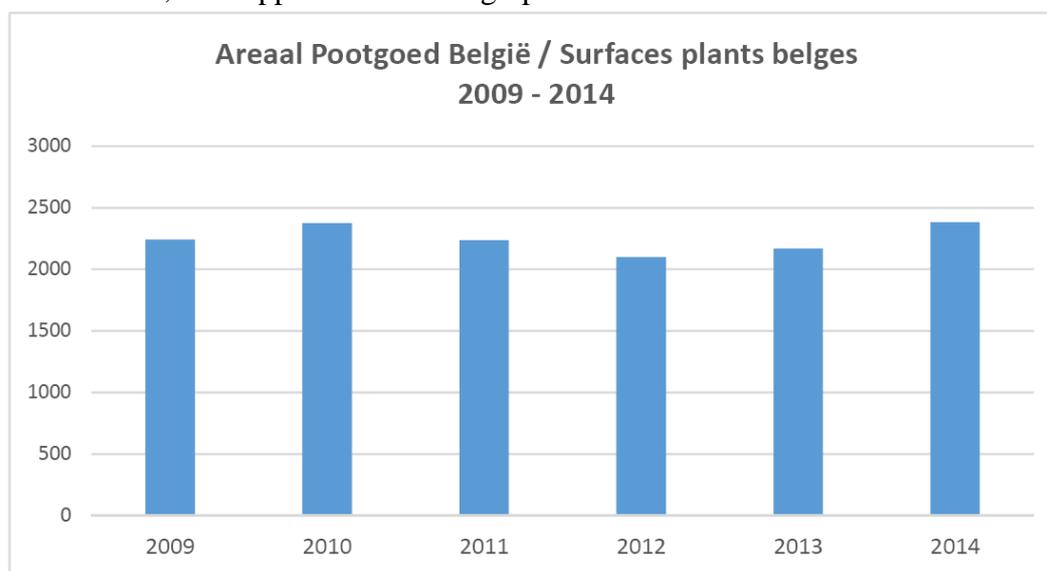
In addition, from 15 to 17 October 2014 participation is also planned in the Fruit Attraction trade fair in Madrid.

In addition to the potato working group, Belgapom is also active in VLAM’s working groups for seed potatoes and fries within the framework of the activities of the arable farming sector group.

On behalf of Belgapom, *Bart Muyshondt* and *Romain Cools* have joined the potato working group, whilst *Didier Binst* follows up the seed potato sector and *Nele Cattoor* the fries sector. *Romain Cools* is also chairman of the arable farming sector group and deputy chairman of VLAM.

Recovery of the Belgian seed potato acreage continues in 2014

After a sharp increase in 2009 and 2010, the Belgian seed potato acreage, the largest part of which is destined for export to Southern Europe and North Africa, experienced a drop in 2011 and 2012 and recovery in 2013. On the basis of the registrations this trend also appears to continue for 2014, as is apparent from the graph below.



**Acreage of seed potatoes in Belgium
2009-2014**

Source: Flemish & Walloon administration/Belgapom processing

Chain consultation ... also for trade and processing?



During the past few years, the Belgian food chain held consultations to try to offer a reply to the major challenges our sector is currently confronted with. The pressure on the various links keeps increasing from various sides so that there is increasingly dissatisfaction.

In the past few years, the various links of the chain Bemefa, the Agrofront (BB, ABS & FWA), UNIZO, Fevia and Comeos have worked together in an atmosphere of understanding and cooperation through various initiatives such as the code of conduct (within which action by a retailer vis-à-vis a potato packaging company was also discussed), a working group on quality above the legal minimum, on an Interprofession Agreement (IPA) as well as on sustainability.

Since a code of conduct was also drawn up in the European Union, the Belgian version has been within streamlined to it. In the 2nd half of 2014 a website will be set up for this code of conduct.

This has amongst other things led to various contacts with the federal and regional governments. Following the elections in 2014, within the chain consultation this cooperation resulted in a chain memorandum for the agro-food chain, that was presented to all the political parties.

For the potato sector, Dirk Decoster (Agristo, on behalf of Fevia) and Romain Cools (on behalf of UNIZO) are actively involved in this Belgian chain consultation. Nele Cattoor handles the sustainability section of this consultation on behalf of UNIZO.

Representation

Belgapom represents the sector directly in *ad hoc councils and committees* such as:

- Ministry of Health: federal plant fund, phytosanitary fund for potatoes, Working Group salt reduction, Working Group salt balance, advisory council for good policy and the use of other consumer products, user groups in various research projects (nematodes, potato wart disease, epitrix).
- FASFC: follow-up committee for potatoes and seed potatoes and advisory committee (via Fevia) Fevia's financing and Self Checking task force, regular consultation with Fevia and FASFC;
- OVPG and Vegaplan: food safety and quality systems for the primary sector, WG Communication and WG Sampling plan within the framework of the equality of Vegaplan and QS and WG sustainability;
- National advisory board of Fevia's Self Checking Guidelines for the food industry;
- Various working groups of Fevia: environmental impact of the food industry, labelling, salt reduction, nutritional policy, Self Checking, growth strategy and participation in Milan 2015;
- Board of directors BIRB (via Fevia);
- Board of directors and general assembly PCA;
- UNIZO environmental and social committee and food platform of;
- Update BBT study for potatoes, fruit and vegetables;
- OVAM study on food waste and loss;
- VITO study on water, waste and a CO2-neutral food industry by 2030;
- VLIMO food, SERV, SALV and MINA council (on behalf of UNIZO);
- Various working groups within FoodDrinkEurope: process contaminants, food contaminants, climate action (on behalf of EUPPA).

Network



Belgapom's secretariat as much as possible tries to fall back on a network in order to represent the interests of its members at every level even better.

To this end, Belgapom is a member of various organisations at European and national level:

- **European:**
 - Europatat, the union of the European potato trade
 - EUPPA, the union of the European potato processing industry
- **National:**
 - UNIZO, the union of self-employed entrepreneurs
 - FEVIA, the federation of the food industry

- OPVG, the consultation platform of the processors of and dealers in vegetable raw materials and products
- Vegaplan, the management body of the Vegaplan standard

Through these memberships, the Belgapom secretariat is part of various boards and management bodies both at European and national level.

Events

Over the course of 2013 - 2014 Belgapom participated in various potato events.

- Together with VLAM Belgapom and a few companies participated in Potato Europe 2013 in Emmeloord (10 – 12 September 2013).
- Various Belgapom trading companies were present with their federation and VLAM with a stand at *Fruit Logistica* in Berlin (5-7/02/2014).
- A Belgapom delegation also participated in the *Europatat conference* in Brussels (22&23/05/2014).
- Belgapom's processing section was present at the *EUPPA conference* in Brussels (14-15/05/2014)



- Belgapom organised the visit by a *delegation of the Chilean potato sector* to Belgium on 4 and 5 September 2013. The delegation visited amongst others the PCA, ILVO and the companies Potato Masters and Remofrit. Naturally the delegation was treated to a visit to a chip shop.

- Romain Cools represented Belgapom at the *US Potato Expo* in 2013 (8-10/01/2014) in San Antonio.
- On the occasion of the launch of the potato quotation in Goes, Romain Cools was invited to explain the functioning of the Belgapom quotation on 29 October 2013.
- Belgapom was also invited by the German potato sector to explain the success of the Belgian potato processing industry:
 - 3 December 2014: visit German by Verband Kartoffelerzeugergemeinschaft to Gembloux
 - 5 June 2014: meeting on arable farming Deutscher Bauernverband in Berlin

Board of directors in 2013 - 2014

Belgapom held its general assembly required under the articles of association on Tuesday, 17 June 2014 at the Montil in Affligem within the framework of the FVPHouse event on food loss.

The board of directors, chaired by Marc Seru, met on the following dates: 3 September 2013, 10 December 2013, 20 February 2014 and 27 May 2014.

The processing section, chaired by Erwin Wuyts, met on the following dates: 6 September 2013, 8 November 2013, 14 February 2014 and 9 May 2014.

The trade section, chaired by Heike Valcke, met on 18 March 2014. In addition, various meetings of the working group export and packaging companies were also held.

The Belgapom secretariat

The secretariat of Belgapom has been housed together with the secretariats of Vegebe (processed vegetables) and Fresh Trade Belgium (import and export of fruit and vegetables) in FVPhouse at *Sint-Annaplein 3 in Berlare*. The registered seat is based in Brussels at Quai de Willebroeck 37.

- **Romain Cools, general secretary**
tel. 09/339 12 49 – mobile phone: 0475/32 87 57 – e-mail: romain@fvphouse.be
 - director of FVPhouse
 - general functioning of the secretariat
 - promotion (VLAM – deputy chairman)
 - social and economic affairs
 - relations with FASFC, UNIZO and FEVIA
 - spokesman
 - Belgapom quotation
 - secretariat sections trade and processing
 - secretariat subsections seed potatoes and peeling companies
 - chairman of committee of secretaries-general and directors of EUPPA
 - OVPG (chairman) and Vegaplan (director)
 - Interpom Primeurs (steering committee)
 - Inno Potato Award (chairman)
 - Belgian chain consultation (steering committee)
 - FVPhouse (director)

- **Nele Cattoor, advisor**
tel. 09/339 12 53 – mobile phone: 0486/27 91 63 – e-mail: nele@fvphouse.be
 - environmental and food legislation
 - sustainability
 - nutrients
 - sampling plans
 - nematode project
 - food loss prevention
 - sustainability manager Interpom Primeurs
 - GMP animal feed
 - Management of Self Checking Guidelines AFV-trade and processing

- **Veerle Van der Sypt, advisor**
tel. 09/339 12 50 – mobile phone: 0476/95 46 82 – e-mail: veerle@fvphouse.be
 - AFV import and export dossiers and certification

- ***Yoke Van den Bossche, administrative staff***
tel. 09/339 12 52 – e-mail: yoke@fvphouse.be
 - members' secretariat
 - accounts
 - administration



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