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WORLD POTATO CONGRESS

AUSTRALIA SET TO HOST 12TH WORLD POTATO CONGRESS IN ADELAIDE



THE TRANSFORMATION OF INDIA'S POTATO FARMING

Sachidanand Madan
Former Chief Executive,
Technico Agri Sciences Ltd- ITC



INDIA HAS SURPASSED THE TOTAL POTATO PRODUCTION OF 60 MILLION TONNES

Dr. Brajesh Singh
Director, ICAR-Central Potato Research
Institute, Shimla, HP, India



POTATO INDUSTRY SCENARIO IN INDIA AND FUTURE PRODUCTION TRENDS IN SOUTH ASIA

Nripendra Kumar Jha
CEO and Chairman of EMC,
Technico Agri Sciences Limited



PUNJAB POTATO IN SEARCH OF RECOGNITION

Sukhjot Singh Bhatti
President, POSCON
& Owner, Bhatti Farms



UNEARTHING POTENTIAL THE IMPORTANCE OF THE WORLD POTATO CONGRESS

Jang Bahadur Sangha
Board Member, World Potato
Congress & MD, Sangha Group



INDIA'S POTATO INDUSTRY IS NOW IN AN EXCITING PHASE

Rudra Pratap Singh Chauhan
Managing Director
Fresh-O-Veg



FROZEN POTATO PRODUCTION IN GUJARAT AND ITS POTENTIAL FOR EXPORT GROWTH

Haresh Karamchandani
MD & Group CEO,
HyFun Foods



INDIAN POTATO PROCESSING INDUSTRY LOOKS PROMISING

K K Menon
Managing Director
MTS Food



INDIAN POTATO VALUE CHAIN AND OPPORTUNITIES FOR FURTHER INVESTMENTS

Rohit Bhandari
Senior Food & Agribusiness
Consultant



INDO-DUTCH COOPERATION IN POTATO VALUE CHAIN AND UPCOMING OPPORTUNITIES FOR FARMERS

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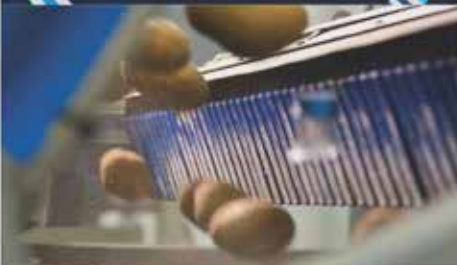
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The Transformation of India's Potato Farming

by Sachidanand Madan (Sachid)



Over the past few decades, India has seen a remarkable evolution in its potato farming practices, driven by innovation, dedicated leadership, and strategic partnerships. At the forefront of this transformation is Technico, India's leading seed potato business and a 100% subsidiary of ITC Ltd. Through cutting-edge technology and rigorous quality control, Technico has revolutionised potato farming, enabling higher yields, superior quality, and greater resilience against pests and diseases. One of the key figures in this journey is Sachidanand Madan (Sachid), who served as the Chief Executive of Technico before his retirement. Under his leadership, along with the efforts of the dedicated Team Technico, the company has played a pivotal role in elevating India's status in the global potato market. Their work has not only benefited the farming community but has also ensured sustainable practices and food security.

In spite of a much lower land area compared to many other countries in the world, driven by day length neutral varieties developed by CPRI and the dedicated Indian farmer, the country became a major potato producer in the world. In 2000's the focus shifted to processing potatoes to meet the growing needs for French Fries and Crisps for its vast consumer base. The challenge of Potatoes 2.0 was finding day length neutral varieties that could match global yields, dry matter, shape and other quality parameters that meet and compete with global benchmarks.

This has now happened but the Journey was quite a struggle and makes for an interesting story best illustrated through the transformation of the French Fry Industry in Gujarat.

When McDonalds came to India French Fries were imported but this was neither desirable nor sustainable. With McDonald's encouragement McCain's set up a plant in Gujarat in 2006 and started growing two varieties that were shortlisted by their Agronomy team after 8 years of Research with multiple varieties across diverse locations. Unfortunately, these varieties were neither great yielder or storers and McCain's agronomy team continued to search the globe and trial multiple varieties to find "The One". Unfortunately, all the global varieties were developed for growing in US and Europe's under long day conditions of an extended summer season. As India grew potatoes over the winter these varieties were not able to meet the global length standards for French Fry Potatoes.

As the COO of Technico (A subsidiary of ITC Ltd) my role involved working closely with the agronomy teams of most global potato processors including McCain's India team and travel to farms

and locations in a number of countries. One such market was Egypt, where Farm Frites and Daltex, after trying multiple varieties, had shortlisted a variety that worked well in Egypt but was not well known or suitable for growing in the US and Europe. Like India, Egypt's main Potato Crop is also grown over the winter.

Based on this insight we suggested that McCain India may like to try this variety called Santana (Owned by STET). Devendra, the GM Agronomy of McCain's India readily agreed. Technico leveraged its proprietary Agri Bio Technology for rapid multiplication of Technituber® Seed under controlled condition and the field multiplication capabilities of it's skilled Agronomy Team in Punjab/UP to deliver high quality early generation seed Potato of Santana to McCain. Devendra and his team did a phenomenal job by trialling and over a period, perfecting the agronomy i.e. Seed size, planting density and fertigation using micro irrigation, in Gujarat. The Gujarat Government led at that time by the current Prime Minister of India Narendra Modi was creating a strong agri infrastructure by supporting micro irrigation, reliable electricity and modern cold storage, which along with the enterprising Gujarat farmer further helped the rapid scale up of this variety. Santana, the "Black Magic" Potato cast its benevolent spell on the Indian French Fry Industry making it the fastest growing French Fry production country in the world.

This variety is one of the highest yielding potato varieties in India with average yields upwards of 50 MT/ha of high-quality storable potatoes suitable for French fry. Better farmers get circa 70 MT/ha. (India's avg is 28 MT/Ha). This has allowed India to be a competitive source for French Fry's.



Does this Potato look long enough! As agronomy got better Santana grew longer than what was required to meet the global French Fry size distribution standards. Actually, too long and agronomy had to be tweaked to cut back the size for “best results”. At the Global Potato Conclave in 2020, Devinder Kumar was recognised with the Potato Achievers Award (Posthumously) for his outstanding contribution in Agronomy for Processing Potatoes.

Fast forward to 2024. Gujarat has become the French Fry capital of India. Hyfun, Iscon Balaji, Amul, Simplot and many others have set up French Fry plants and more are in the pipeline. India is now a major exporter of French fries and most existing players are expanding to meet local and export demand. Farmers in Gujarat are shifting to Santana as they make more money

and demand continues to be ahead of supply. Higher profits have allowed them to mechanise, build modern stores and maintain soil health by growing just one 90 to 100 day crop. This has also made farming attractive once again, encouraging youth to take up farming and expand as well as modernise their farms (one can see a number of Grimme machines). This has provided a much-needed boost to the local economy creating employment and wealth for ancillary support businesses/services as well as consumption.

Gujarat farmers followed this success by growing the best crisping potatoes of a variety called Lady Rosetta and Technico once again played a key role in ensuring quality seed availability. But that’s a story for another day as is the development of India’s Seed Potato sector and the transformation that is happening in table potatoes.

Agristo has bravely set up a facility in the Northern state of Uttar Pradesh in a JV with the Waves group using the same Santana variety as a core and others are also following. This is also expected to transform the farming landscape of the state and double the income of Potato farmers. Crisping plants have been set up across the country and trials for Potatoes for French Fry have also started in Bengal and Bihar. The knowledge and expertise gained in Gujarat and other areas has spread to the rest of the country transforming potato growing with the use of modern techniques, better

seed and excellent varieties bred by CPRI as well as global breeders making India’s potato crop of 60 million MT the 2nd highest in the world. New local and imported varieties for French Fry, Crisping and Table purposes continue to be trialled with varied degree of success.

Potatoes are not just food but also the livelihood of farmers and well to do farmers an asset for any country! This is a great example of creating memorable music by different players of the Orchestra getting together and collaborating to meet common objectives. Santana is more than the Black Magic Woman! ☑

Author: Sachidan and Madan (Sachid) the author was the Chief Executive of Technico prior to his retirement. He is grateful that he, along with Team Technico, got an opportunity to play a part in India’s Potato success story. Technico is India’s #1 Seed Potato Business and is a 100% subsidiary of ITC Ltd.

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With the celebration of first ever International Day of the Potato on 30th May 2024 as designated by the Food and Agricultural Organization (FAO) with the theme “Harvesting Diversity, Feeding Hope”, we envisage a great role that potato might play in Food and Nutritional Security for the populations. For India, being agriculture-based country, and agriculture (along with its allied sectors) being the largest livelihood provider; for achieving: (i) No poverty, (ii) Zero hunger, (iii) Food health and well-being; the three of the seventeen Sustainable Development Goals (SDGs) adopted by all United Nations (to be achieved by 2030), much depends on growth and performance of agriculture sector. India is expected to be most populous country in the world by 2050 with about 1.67 billion populations. Diversification and utilization of horticultural crops would be the most important strategy to ensure food and nutritional security of the burgeoning population. This highlights the importance of horticultural crops in Indian agriculture and future thrust on research and development of horticultural crops. Potato is one of the important horticultural crops and because of its ability to produce highest nutrition and dry matter on per unit area and time basis, among major food crops it is often referred as “Commodity for Class and Mass”, and it has immense potential to contribute for achieving the above stated three SDGs.

India has recently completed seventy-five years of its

independence and aspires to be a Developed Nation in the next twenty-five years (i.e. 2047). Within just seventy-five years of its journey as independent nation, India has surpassed the total potato production of 60 million tonnes and the average yield of 25 t/ha. This is a remarkable and inspirational milestone for the whole nation in general and for the stake-holders associated with potato in specific. Collection of trait specific germplasms, development of biotic and abiotic stress resilient varieties for all sectors accompanying suitable plant protection, production and post-harvesting handling practices has played a pivotal role in potato growth in the country. The huge potential of processing and exports are new dynamics to the sector.

On the occasion of the World Potato Congress at Adelaide, South Australia during 23-26 June 2024, I wish all the success to the organizers for the great deliberations and exhibitions. It is hoped that outcome of WPC shall bring about new dimensions to the Potato growth and development in the world.

Dr. Brajesh Singh,
 Director, ICAR-Central
 Potato Research Institute
 Shimla, HP, India
 E-mail: Brajesh.Singh@icar.gov.in



"It is with immense pleasure and satisfaction that the World Potato Congress marks its 12th edition and is scheduled to be held from June 23 to 26, 2024, in Adelaide, Australia. I note that eminent researchers and speakers have generously offered to share their findings and experiences with this august gathering. I am confident that stakeholders will deliberate on various subjects and seek solutions to the challenges faced by the potato industry. I hope they will strive to identify actionable agendas to further the cause of potatoes. I believe this elite group will inspire newcomers

who aspire to build a future with this fascinating crop. I am aware that organizing a conference of such magnitude requires painstaking efforts, and therefore, the organizers richly deserve commendation."

I wish the event all success.

Sukhjit Singh Bhatti,
 President, POSCON

Punjab Potato in Search of Recognition

by Sukhjit Singh Bhatti
President, POSCON



For reasons unknown, potato farmers of Punjab, a N.western state in India, have been shy about their achievements. The farmers are industrious, quick learners, outward looking and are amenable to adoption of new technologies. Further, the state is a part of semi-tropics and its agro-climate is ideally suited for production of vigorous, disease free potato seed under short day conditions. In spite of possessing an enviable stature, the potato world has not taken due notice of the potential of this region and the state is yet to be accorded it's rightful place. During recent past, its inadequate representation at international fora has become a subject of frequent debates. The case, therefore, needs a serious examination by interested and inquisitive minds for an objective analysis that yields a dispassionate perspective.

HISTORICAL: Available records indicate that stray attempts were made to grow potato in Punjab immediately after independence and partition of India in 1947. Potato seed used, however, was of questionable quality. The next decade witnessed movement of potato seed from proximal hilly regions to the plains of the state. The state's alluvial soils, low in

organic carbon content, complemented by an ideal temperature regime during winters responded well to the farmers efforts. Hence potato established itself as a regular member of the cropping system, notably in the central districts of the state. Paucity of quality seed material continued to be a constraint.

THE ASCENT: A major inflection point in potato seed production occurred in mid-sixties of the last century. The area was scene of an event that catapulted the region to a prominent position in seed production. The event was no serendipity. It was rather a consequence of systematic and sustained research surveys by the Central Potato Research Institute of India. The exercise resulted in identifying a vector free window spanning over one hundred days during short days. The development was registered as ' seed plot technique ' in the annals of Indian potato research. The answer to the ever burgeoning demand for potato seed was, thus, in public domain. Additionally, not to acknowledge the role of farmers will be a travesty of this dividend yielding development.

As a result, the region emerged as nucleus for producing quality potato seed. The hills, hitherto, serving as supply centers almost faded into oblivion. The reasons were threefold:

- (i) Groundkeeper plants in hills interfered with the physical purity of seed.
- (ii) Potato harvested in hills during September/October was not suitable for immediate planting in the plains owing to its dormancy and needed special treatment.
- (iii) Prohibitive logistics, typical of hills was a significant disincentive.

CURRENT SCENARIO: The state is representative semi-tropic geographical area free from disease spreading vectors. The soils are light textured with quality irrigation ground water. Potato crop is firmly established as part of cropping



systems. The region, thus, possesses all the essential ingredients for seed potato production. This is in contrast with warmer pestiferous environs unsuitable for quality potato production. It is not surprising that the fields under potato cultivation even for five decades at a stretch are still free from diseases of quarantine significance viz. *Ralstonia*, *Clavibacter*, *Scab* and *Globodera*. Although very precise figures may not be available but credible estimates indicate that the state produces about 3 million tons of potato over an area of 1.2 lac ha. annually. About 2.2 million tons is stored in 550 cold storages. Approximately 0.7 million tons is supplied as seed to various potato growing regions in the country under an informal arrangement. The industry is worth 20 billion INR an year.

AFTER WORD: It may not be out of context to state that Punjab seed potato is an international stuff by all standards. Creation of an enabling environment characterized by a scrupulous regulatory frame supplemented by handholding by the concerned quarters, however, is imperative. With a supportive system in place, Punjab seed potato is surely a candidate for podium finish in a competitive global potato seed trade.

☐



Unearthing Potential - The Importance of the World Potato Congress



“As a board member of the World Potato Congress, I am honored to welcome stakeholders from across the globe to our biennial event. Together, we shape the future of potato farming, promote sustainable practices, and address global food security challenges. Let us use this platform to foster innovation, strengthen partnerships, and celebrate the versatility of the potato. Your participation is crucial in advancing our collective efforts towards a resilient and thriving potato industry worldwide.”

– Jang Bahadur Singh Sangha,
Board Member, World Potato
Congress & MD, Sangha Seeds,
Jalandhar, India

In the realm of global agriculture, few gatherings hold as much significance as the **World Potato Congress (WPC)**. This biennial event serves as a pivotal platform where stakeholders from across the potato industry converge to discuss innovations, challenges, and the future of this versatile tuber. With its rich history and growing influence, the WPC plays a crucial role in shaping agricultural practices, consumer habits, and food security worldwide.

A Changing Landscape: Consumer Habits and Food Security

Potatoes, once relegated primarily to a few staple dishes, have evolved into a cornerstone of diets worldwide. From mashed potatoes on American dinner tables to batata vada in India and poutine in Canada, the culinary versatility of potatoes has made them a global favorite. The WPC recognizes this evolving consumer demand and serves as a forum for discussing how to meet these expectations sustainably.

Furthermore, in an era where food security is increasingly threatened by climate change and population growth, the potato offers a resilient solution. Its ability to thrive in diverse climates and its high nutritional value make it a valuable crop for ensuring global food security. At the WPC, experts share strategies for optimizing potato production, improving yield, and enhancing nutritional content to meet the demands of a growing population sustainably.

Networking Across the Potato Value Chain

One of the most crucial aspects of the WPC is its role in fostering collaboration and networking among stakeholders in the potato value chain. Farmers, researchers, policymakers, and industry leaders gather to exchange knowledge, share best practices, and forge partnerships that drive innovation and efficiency in potato production.

For farmers, the WPC provides access to cutting-edge research on pest management, soil health, and climate-smart agriculture. Researchers benefit from direct feedback from growers and processors, guiding their efforts to develop new varieties and technologies. Policymakers gain insights into regulatory frameworks that can support sustainable potato farming practices and ensure food safety.

South Asia - A Growing Force in Potato Production

Looking ahead, South Asia is poised to become a powerhouse in global potato production. With its large and growing population, diverse agro-climatic zones, and increasing demand for nutritious and affordable food, the region presents significant opportunities and challenges for potato cultivation.

Countries like India, Bangladesh, Nepal and Pakistan are already major producers of potatoes, and their influence in the global potato market continues to grow. The WPC serves as a platform for South Asian stakeholders to showcase their innovations, learn from global best practices, and strengthen international partnerships. By leveraging their collective expertise and resources, South Asian nations can play a pivotal role in shaping the future of potato farming and ensuring food security on a global scale.

In conclusion, the World Potato Congress stands as a beacon of innovation, collaboration, and sustainability in the agricultural world. By bringing together stakeholders from around the globe, the WPC not only celebrates the humble potato's culinary diversity but also addresses critical issues such as food security, climate resilience, and consumer preferences. As we look towards the future, events like the WPC will continue to play a vital role in advancing potato farming practices and ensuring that this resilient crop remains a cornerstone of global agriculture. ☑

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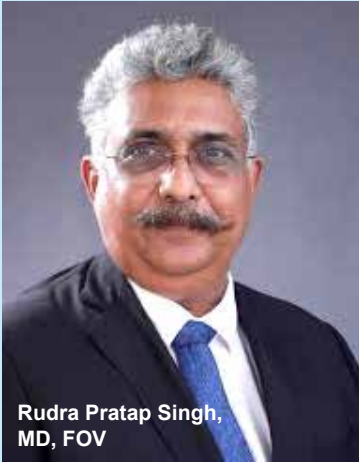


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India's Potato Industry is now in an Exciting Phase



Rudra Pratap Singh,
MD, FOV

Rudra Pratap Singh shares his insights on the transformative changes taking place in the industry. He highlighted the innovations, investments, and opportunities that are propelling the potato industry forward. His expertise provides a comprehensive overview of how these developments are shaping the future of potato farming, processing, and distribution in India.

Can you tell us a bit about Fresh-O-Veg and its journey since its inception in 1995?

Fresh-O-Veg was incorporated in 1995, and we started our journey in the potato domain in India. We were pioneers in scientific farming and the storage of process-grade potatoes in the country. Our first storage facility for process-grade potatoes was developed in 1998, and since then, we have continually advanced through mechanization, varietal trials, and repurification, collaborating with many major corporations.

What are the main verticals and areas of expertise for Fresh-O-Veg?

Our primary vertical remains the potato industry. We support numerous industries by providing complete solutions for process-grade potatoes, covering everything from handling and processing to packaging. To date, we have designed nearly 30-40 processing plants. Additionally, we help industries with the entire technology for process-grade potatoes, from handling to processing and packaging.

How has the role of Fresh-O-Veg evolved in the potato industry over the years?

Our role has evolved significantly. About five or six years ago, the demand was primarily driven by potato crisps. Nowadays, the focus has shifted towards frozen products, particularly french fries. We are also witnessing the emergence of a specialty potato division, catering to consumer needs with products like mashed and boiled potatoes, which will soon be integrated into India's supply chain.

How has the processing rate of potatoes changed in India over the years?

During the era of crisping, only about 3-4% of potatoes were converted into snacks like crisps, bhuja, or flakes. With the advent of modern french fries, the processing rate has increased to approximately 17-18%. As retail products like mashed and boiled potatoes gain popularity, we anticipate this figure will rise to 35-40% of the organized potato market within the next 3-5 years.

Which regions in India are currently leading in potato production, and where do you see the most growth potential?

Gujarat is currently a leading region, performing exceptionally well. However, we see substantial growth potential in parts of eastern Uttar Pradesh (UP) and Bihar belts. These areas offer unique agro-climatic advantages, such as less impact from western disturbances, more consistent sunlight, and lower disease prevalence, which contribute to higher productivity.

How does the performance of regions like Agra compare to Gujarat in terms of potato production?

Agra has traditionally been strong due to its favorable soil and climate, but Gujarat has surpassed it through improved agricultural practices. As these practices disseminate to eastern UP and Bihar, we expect significant growth. Many companies have already started trials in these regions, indicating promising developments.

What are some of the challenges faced in varietal development for potatoes in India?

One major challenge is developing heat-resistant varieties to cope with our high temperatures during harvest time. The critical period from harvest to storage often sees the most quality deterioration, so minimizing this window is essential. Short day varieties development and adaptability to different climatic conditions are also important factors.

Finally, how do you view the future of India's potato industry?

India's potato industry is now in an exciting phase. Whether in processed potatoes or ware potatoes, both segments are just beginning to tap into their full potential, representing only the tip of the iceberg. The next few years will be crucial as we continue to innovate and expand in this sector. ☑

The Indian Potato Processing Industry Seems Promising



In an exclusive interview, KK Menon, MD of MTS Food, shares insights into his company's journey and India's potato industry. With over 40 years in food processing and a mechanical engineering background, Menon has been a pioneering entrepreneur for nearly two decades. mtsfood specializes in cutting-edge technologies for cutting, peeling, and sorting, collaborating with global leaders VANMARK and TOMRA to integrate Western innovations with Indian agriculture. Their expertise includes abrasive and steam peeling, advanced cutting solutions, and TOMRA's cutting-edge sorting technologies like cameras, lasers, and X-ray systems. mtsfood serves diverse segments of the Indian food industry, focusing notably on potatoes, delivering high-quality and efficient solutions tailored to client needs.

Speaking of potatoes, you've mentioned the dynamic growth in the potato processing industry in India. Could you elaborate on the current trends and developments you're observing, particularly in the Gujarat and Uttar Pradesh regions?

We've witnessed a significant evolution in the Indian potato processing landscape. Initially centered around potato chips, the focus has now shifted towards potato flakes and, notably, French fries' production. This shift is particularly prominent in regions like Gujarat and northern Uttar Pradesh, driven by an increasing number of players investing in state-of-the-art plants with capacities ranging from 6 to 8 tons per hour. While there's also activity in the eastern part of India, Gujarat remains a key hub due to factors such as seed quality and sugar content. Potato chips, on the other hand, have a broader market presence across the country.

Could you elaborate on the importance of platforms such as Exhibitions & Congress, particularly considering events like The World Potato Congress and the upcoming World Potato Summit 2025? How do you envision these gatherings contributing to the overall consolidation of the industry?

Platforms like the Congress play a crucial role in fostering collaboration and innovation within the food processing industry, especially for segments like potatoes, which constitute a substantial portion of our business, accounting for approximately 30 to 40%. Such events provide valuable opportunities for industry players to showcase advancements, discuss challenges, and explore synergies. Given the growing domestic market and increasing export



opportunities, forums like this enable us to stay abreast of industry developments and forge partnerships that drive growth and sustainability.

Lastly, could you share your insights into the future prospects of the Indian potato processing industry, both domestically and in international markets?

The future of the Indian potato processing industry looks promising, driven by factors such as increasing consumer demand for convenience foods and the country's growing export potential, particularly in Asian and European markets. With a focus on quality and innovation, coupled with advancements in processing technologies, Indian players are well-positioned to capitalize on these opportunities. However, addressing challenges such as seed quality and market access is essential to fully realize the industry's potential. Overall, I'm optimistic about the continued growth and evolution of the potato processing sector in India.



Potato Industry in India and Future Production Trends in South Asia

by Nripendra Kumar Jha



Nripendra Kumar Jha, Chief Executive Officer and Chairman of Executive Management Committee of Technico Agri Sciences Limited (a 100% subsidiary of ITC Limited) shares his thoughts on the current state of potato industry in India and the trends likely to be witnessed in the coming years in South Asia. He is a passionate business leader in the Agriculture Industry, having diversified experience in Agri & Food Business Domain and also a Director on the board of Technico Group Companies.

- ❖ He is a member of Research Advisory Committee of Central Potato Research Institute (CPRI) of India, a National Apex body for Potatoes of Government of India.
- ❖ He is also an active member of National Agricultural Committee of Federation of Indian Chambers of Commerce and Industry (FICCI).
- ❖ He with ITC Limited since 2007 and working to strengthen the potato value chain in India and several other countries.

The potato, a staple food globally, holds a unique position in India's agricultural landscape, symbolising centuries of adaptation, innovation and economic potential. Introduced just 400 years ago to the subcontinent by European voyagers, the potato found fertile ground in India's diverse climates and agricultural practices.

Historically, the introduction of the potato faced initial resistance. However, its versatility and mild flavour gradually won acceptance, becoming a crucial dietary component. The turning point for India's potato industry came in the mid-20th century with the establishment of the Central Potato Research Institute (CPRI) and subsequent innovations. The release of the late blight-resistant variety Kufri Jyoti in 1968 marked a significant leap, coinciding with the Green Revolution's focus on enhancing agricultural productivity.

Today, India's potato industry is characterised by robust growth across various segments. From traditional cultivation in the fertile plains of Punjab to the terraced gardens of Himachal Pradesh and the Nilgiri Hills, the crop has adapted to diverse agro-climatic zones. The integration of modern agricultural practices, including micro-irrigation, precision farming, and sustainable practices, has further enhanced productivity and resilience against climate variability, making India the second-largest producer globally by the early 21st century.

Looking ahead, the future

of India's potato industry appears promising, driven by technological advancements and changing consumer trends. Projections indicate a substantial increase in both- cultivation area and production volume by 2050. The area under potato cultivation is expected to expand to 3.6 million hectares, with production reaching approximately 125 million metric tons (ICAR-CPRI: Potato processing scenario & prospect in India). Innovations in seed technology, genetic enhancement, and agronomic practices are poised to boost productivity to 34.7 tons per hectare (ICAR-CPRI: Potato processing scenario & prospect in India), ensuring sustainable growth amidst evolving climatic challenges.

Furthermore, the demand for processed potato products is on an upward trajectory. The Indian processing industry envisioned that demand for processing quality potatoes over the next 40 years will rise at the fastest pace for French fries (11.6% ACGR) followed by potato flakes/ powder (7.6%) & potato chips (4.5%) (ICAR-CPRI: Potato processing scenario & prospect in India). Rapid Urbanisation, changing lifestyles, and the rise of convenience foods have spurred the demand for frozen and dehydrated potato products. The Indian frozen potato products market alone reached US\$ 1.4 billion in 2022 (ICAR-CPRI: Potato processing scenario & prospect in India), projected to grow at a compound annual growth rate (CAGR) of 12.16% through 2028 (ICAR-CPRI: Potato processing scenario & prospects in India). This growth is fueled by the increasing penetration of quick-service restaurants and online food delivery services, particularly accentuated, during

FUTURE PRODUCTION TRENDS

the COVID-19 pandemic.

Despite significant domestic consumption, India's processed potato exports have gained momentum in recent years. The country's processed potato export earnings surged from US\$ 56.7 million in 2021-22 to US\$ 107.49 million in 2022-23, showcasing a robust CAGR of 44.2% (ICAR- CPRI: Potato processing scenario & prospect in India). India's total exports of processed potatoes to South Asian countries like the Philippines stood at US\$ 43.24 million in 2022-23, followed by Thailand (US\$ 30.78 million), Indonesia (US\$ 6.99 million), Vietnam (US\$ 6.22million), and Malaysia (US\$ 4.64 million) (ICAR-CPRI: Potato processing scenario & prospect in India).

There is ample scope for Indian manufacturers to further tap into international markets, especially in the top importing nations such as the

There is ample scope for Indian manufacturers to further tap into international markets, especially in the top importing nations such as the US, UK, Japan, France, and Germany, presenting an opportunity for exponential growth

US, UK, Japan, France, and Germany, presenting an opportunity for exponential growth.

The potato industry in India epitomises a global shift, where Asia has emerged as a vibrant centre for this versatile crop. China and India now

lead as the top two global producers, collectively contributing 40% of the world's potato output. Looking ahead, projections suggest that by 2030, Asia, Africa, and Latin America combined will produce a staggering 60% of the world's potatoes.

In conclusion, the South Asian potato industry stands at a pivotal juncture, poised for exponential growth driven by innovation, technological integration, and evolving market dynamics. With sustained investment in research, infrastructure, and market development, India is well-positioned to not only meet domestic demand but also emerge as a key player in the global potato market. As the journey continues, the potato remains not just a humble vegetable but a symbol of India's agricultural prowess and economic potential in the 21st century. ☑

Frozen Potato Production in Gujarat and its Potential for Export Growth

by Haresh Karamchandani,
MD & Group CEO of HyFun Foods



Haresh Karamchandani,
MD & Group CEO, HyFun Foods

Located in Mehsana, Gujarat, the HyFun Foods factory is a testament to the region's burgeoning frozen potato production industry. Under the leadership of Haresh Karamchandani, HyFun Foods has become a key player in this sector, leveraging advanced technology and sustainable practices to produce high-quality frozen potato products.

Gujarat's favourable climate and agricultural expertise provide an ideal environment for potato cultivation, supporting the growth of the frozen potato industry. The increasing demand for convenience foods, both domestically and internationally, presents significant opportunities for export growth. HyFun Foods is well-positioned to tap into these markets, thanks to its state-of-the-art facilities and commitment to quality.

Gujarat has emerged as a pivotal player in India's frozen potato industry, leveraging its favorable climate, advanced agricultural practices, and state-of-the-art processing facilities. The region's strategic focus on enhancing infrastructure, maintaining high standards of quality and sustainability, underscores its readiness as an alternate production hub for French Fry Production. Moreover, Gujarat's logistical advantage further bolsters its potential to significantly contribute to India's agricultural exports and strengthen international trade relations.

Current Capacity and Strategic Expansion Plans

In 2014, India produced 35,000 tonnes of French fries and other frozen potato-based products, primarily for domestic use. By 2023-24, production has surged to 3.0 lakh tonnes, with India emerging as a significant exporter, shipping approximately 2.0 lakh tonnes of French fries and similar products worldwide. The revenue from frozen French fries in India is projected to grow significantly, reaching US\$ 2.25 billion by 2034. This growth is driven by increasing consumption and demand for processed potato products, fueled by rising disposable incomes, urbanization, changing dietary habits, and the growing popularity of convenience foods among Indian consumers. The market dynamics reflect a notable shift towards processed and convenience foods, with frozen French fries gaining traction due to their convenience, availability, and appeal across various demographic segments.

Industry stakeholders are pursuing strategic expansions to capitalize on increasing global demand, including



Soundararadjane S, CEO, HyFarm

modernizing facilities, adopting advanced technologies, and scaling up operations.

Haresh Karamchandani, MD & Group CEO of HyFun Foods, emphasizes, *"Our planned 1,100 Crore investment in Gujarat over the next 3 years represents our commitment to quality and innovation and aligns perfectly with the potential Gujarat holds for enabling food processing companies by further leveraging the abundant Agri-produce in Gujarat."*

Speciality Products Catering to Global Tastes

Gujarat's frozen potato industry has diversified its offerings to cater to varied global tastes, from traditional french fries to specialized potato products tailored for different culinary uses. This versatility enhances market competitiveness and positions Gujarat as a reliable supplier capable of meeting specific market demands across various regions.

Global Reach and Quality Assurance

Products from Gujarat's frozen potato industry adhere to stringent international quality standards, facilitating export to

FROZEN POTATO POTENTIAL



over 40 countries worldwide. This global reach underscores Gujarat's capability to meet global regulatory requirements and its reputation for delivering consistent, high-quality products, crucial in maintaining strong market positions and enduring partnerships with international distributors and consumers.

Sustainability Initiatives and Farmer Partnerships

Sustainability is a priority in Gujarat's agricultural practices, with efforts to promote eco-friendly farming techniques and minimize environmental impact. Gujarat's commitment to enhance its reputation as a responsible global supplier, appealing to environmentally conscious consumers and businesses worldwide. HyFun Foods' sustainability initiative aligns closely with HyFarm's efforts to promote eco-friendly farming techniques and ensure a sustainable supply chain of high-quality potatoes. Key potato seed production hubs in Punjab, Haryana, Uttar Pradesh enable in providing Potato Seeds to Gujarat Farmers for growing the commercial crop as raw material (Fry stock) to French fry Manufacturing Plants. Moreso, Gujarat benefits from conducive agricultural environment and robust infrastructure for potato cultivation and processing, further reinforcing the commitment to sustainable practices across different regions. Soundararadjane S, CEO of HyFarm- a HyFun foods subsidiary focusing on farm linkages - highlights, "At HyFarm, we foster strong partnerships with local farmers in Gujarat. We leverage on varied French Fry varieties of potatoes like Santana and Frysona, Crisping varieties and Table varieties to produce portfolio of frozen snacks viz., French fries, Speciality Products and Dehydrates (Flakes). This strategic use of different

potato varieties enables HyFun Foods to meet diverse consumer preferences both domestically and internationally. It also underscores HyFun's commitment to quality and innovation in delivering exceptional frozen food products to the market."

Technological Advancements and Market Adaptation

Advanced technologies in Gujarat's frozen potato industry have revolutionized production efficiency and product quality. From automated processing lines to precision farming techniques, these advancements optimize resource utilization and reduce production costs while meeting stringent quality control measures. The Farmoji app exemplifies HyFun's commitment to integrating technology into Gujarat's agricultural landscape, enhancing efficiency and productivity across the region.

Participation in International Forums

Soundararadjane S will represent HyFun Foods at the upcoming World Potato Congress, a vital platform for Gujarat's frozen potato industry to engage with global stakeholders,

exchange knowledge, and explore new opportunities. Participation in such international forums highlights Gujarat's technological advancements, product innovations, and strengthens its network with industry peers and potential partners worldwide.

Looking ahead, Gujarat's frozen potato industry is poised for dynamic growth in global exports, driven by increasing consumer demand for convenient and nutritious food options. Strategic investments in infrastructure, technology, and market diversification are expected to further propel Gujarat's export capabilities. With robust leadership and a commitment to environmental stewardship, Gujarat aims to emerge as a leading global supplier of frozen potato products, reinforcing its role in India's agricultural exports and global agricultural innovation.



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Indo-Dutch Cooperation in Potato Value Chain and upcoming Opportunities for Farmers

by Davinder Singh Dosanjh,
CEO, Mahindra HZPC



The collaboration between India and the Netherlands in the potato value chain has opened new avenues for innovation and growth. Under the leadership of Davinder Singh Dosanjh, Mahindra HZPC is at the forefront of this partnership, bringing together Dutch expertise in potato cultivation and Indian agricultural practices.

This cooperation aims to enhance the entire potato value chain, from seed technology and cultivation methods to processing and market access. Indian farmers stand to benefit immensely from these advancements, gaining access to high-quality seed varieties, improved farming techniques, and better market opportunities.

As we look ahead, the Indo-Dutch collaboration promises to unlock significant potential for Indian farmers, boosting productivity, sustainability, and profitability in the potato industry. Join us as we explore the exciting opportunities emerging from this international partnership.

India and the Netherlands are maintaining strong relations in various sectors like Science & Technology, Healthcare & Water management. One of the standout areas of this collaboration is the potato value chain. India being the second largest producer of potatoes (production of about 58 million metric tons) and Netherlands, renowned for its innovative research and breeding in potato with continuous focus on sustainability, forms the backbone which can significantly enhance productivity and sustainability in this sector. This partnership is unlocking enormous opportunities for potato value chain—mainly for Dutch Potato varieties and Machinery for farming/ post-harvest operations/storage. Knowledge and Technology sharing helps strengthen the relationship.

The Success Stories of Dutch varieties in India

While the Table/Ware potato sector (Largest sector) is dominated by varieties developed by CPRI (Central Potato Research Institute), the Processing sector witnessed success stories with Dutch varieties early on. Lady Rosetta, a Dutch Crisping sector variety, became the favourite of many farmers and Crisping companies, in a short span of time. French Fries sector, from its inception, worked with Dutch varieties. These varieties ensure higher output



Innovator, a French Fries variety

and efficiency on the processing line and hence found promoters in the processing companies.

Table potato market in India, is highly fragmented and unorganised and hence the traction for Dutch varieties started late here. This market is broadly traditional, with negligible Retail Fresh sector (differentiated packaged potato).

Lately, one of the Dutch varieties, for table sector-Colomba has caught the fancy of farmers, as well as supply chain intermediaries due to its significantly higher value add at all levels. The short duration, shining skin and common scab resistance of this variety led to better productivity and prices for the farmers.

HZPC from Netherlands, world's market leader in seed potato sector, took a firm step, to enter Indian market by forming a JV with Mahindra & Mahindra, in 2014.

Many other Dutch and European companies (Meijer, Agrico, Germicopa, IPM etc) are at different stages of penetration in Indian market.

India is not a signatory to UPOV, but it has its own law named PPV&FR (Protection of plant varieties and Farmers Rights), as sui generis system. Protection for potato varieties currently is for 15 years, vs 30 years under UPOV. This seems a concern area for many international breeders, who are fence sitters at the moment.

Bringing a new potato variety, testing it in different agroclimatic zones of India and then commercialising is a lengthy process, takes 8-10 years. Thus, extension of period for protection for breeder rights would lead to more players entering the market with speed, and lead to more choices of potato varieties in the market, promoting healthy competition.

Opportunities in India

Potatoes would continue to evolve

INTERNATIONAL COOPERATION



Colomba boosting farmers profit in Gujarat

from being a vegetable to a vital food security crop. Given the limited cultivable land available, the increased potato production has to be driven by increased productivity, accompanied with focus on factors like sustainability, added

nutritional value, climate resilience and disease resistance in future. As per CPRI vision statement- 2050; the Indian demand for potatoes will grow from current levels of 58 million MTs to 121.81 million MTs in 2050. The demand growth will be driven mainly by processing sector, where Dutch varieties are well established. For this demand to be met with production, area under potato would increase from 2.3 million hectare to 3.62 million hectare and Productivity is forecasted to increase from current 24 t/ha to 34.51 t/ha. Therefore, the opportunities lie on research and breeding of new varieties with higher production capacity where the country like Netherlands has technological and experiential strengths. The complementing opportunities would be in area of Mechanisation, as labour availability is becoming a constraint for potato growers.

With Dutch varieties cultivated in many countries of the world, and now being available in India, has enhanced potato export potential from India for such

varieties. As per ITC export potential map, the total unrealized export potential of seed potatoes in the world stands at \$615 million. This collaboration will give global market access for Indian seed growers. To realise this, bilateral agreements between countries and a robust and functional certification system are basic requirements.

The Indo-Dutch cooperation in the potato value chain represents a win-win scenario for both nations. By combining India's potential with Dutch technological as well as breeding expertise and sustainable practices, this partnership is set to revolutionize potato farming in India. The upcoming opportunities for farmers are vast, promising not only enhanced productivity and income but also a more sustainable and resilient agricultural sector. As this collaboration continues to evolve, it will undoubtedly serve as a model for international agricultural cooperation, paving the way for a brighter future for Indian potato farmers. ☑




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Indian Potato Value Chain and Opportunities for Further Investments

by Rohit Bhandari



Rohit Bhandari,
Senior Food & Agribusiness
Consultant

Rohit Bhandari, a Senior Food & Agribusiness Consultant with extensive experience in the potato industry shares his perspective on the current state of the industry and potential areas for future investments, aiming to further enhance the efficiency, sustainability, and profitability of potato farming and processing in India.

The global potato production landscape, as highlighted by the FAO's 2022 statistics, underscores the substantial yet marginally growing output, with a total of around 375 million tonnes. Notably, India stands out as the second-largest producer, boasting a remarkable 56 million tonnes in 2022 and demonstrating a significant 17% growth over the past six years. This growth is particularly relevant given the stagnation or slight decline in production in traditionally strong potato processing countries like the USA, France, Germany, Belgium, and the Netherlands.

Opportunities for India's Processed Potato Industry

India's surge in potato production and the global processing trends presented a unique opportunity for the country to become a key player in the processed potato products market, particularly Frozen French Fries, Potato Flakes, and Potato Starch. The Indian potato processors seized this opportunity by significantly increasing the exports during last 5 years (2019-20 to 2023-24).

Given the global consumption increase of processed potato products at 4-5% annually, India has substantial potential to expand its market share through competitive pricing and quality improvements.

Factors Favouring India's Potato Processing Industry

For scaling up the production & exports of processed potato products from India, there is a very favourable environment in India which inter-alia includes:

- ◆ Well developed seed potato supply chain with good availability

of technology for production of mini tubers and seed potato cultivation. India's premier potato research organization – Central Potato Research Institute has also developed some processing type potato varieties.

- ◆ A number of farmers and their groups specializing in producing seed potato are capable of supplying good quality seed potatoes.
- ◆ Many corporates have developed backward linkages with farmers taking a lot of interest in contract farming due to assure market and lucrative price offered by these companies.
- ◆ Due to the above factors, the availability of processing type of potatoes in India has increased from 2 million tonnes to 4 million tonnes during last 5-6 years and it can further increase depending upon the requirements of the processors.
- ◆ Adequate availability of modern cold stores for storage of "Sugar-free" potatoes for extended periods of time enabling the processors to process till December.
- ◆ A lot of support from Central Government agencies like Ministry of Food Processing (MOFPI), National Horticulture Board (NHB), Agricultural and Processed Food Products Export Development Authority (APEDA) through various schemes for setting up of new processing units, cold stores and promotion of exports.

INVESTMENT OPPORTUNITIES

Frozen French Fries:

Exports grew from 28,000 tonnes to 137,000 tonnes.

Potato Flakes:

Exports increased from 5,000 tonnes to 31,000 tonnes in the same period.

Potato Starch:

Exports rose from 500 tonnes to 3,200 tonnes.

Global Market Share

Despite this growth, India's current shares in global trade are quite modest:

Frozen French Fries: 1.5%

Potato Flakes: 5.6%

Potato Starch: <1%



- ◆ Some of the major global equipment manufacturers of potato processing and potato storage solution providers have set up production base in India.

Investment Opportunities

Given the favourable environment and growth potential, there are significant opportunities for investment in:

- ◆ Potato processing units.
- ◆ Modern cold storage solutions.
- ◆ Contract farming initiatives.

- ◆ Seed potato production.

By leveraging these opportunities and continuing to enhance price competitiveness and quality adherence, India can position itself as a global hub for processed potato products, tapping into the increasing global demand and expanding its market presence significantly.

So far, most of the export-oriented potato processing units are located in Gujarat, however, there are very good opportunities in major potato producing states like Uttar Pradesh, West Bengal, Madhya Pradesh, and Punjab.



Author:

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Australia set to host 12th World Potato Congress in Adelaide

In 2024, Australia proudly welcomes the 12th World Potato Congress to Adelaide, marking a significant moment for the global potato industry. Scheduled from June 23-26, the World Potato Congress not only provides a platform to showcase the excellence of the Australian potato sector but aims to thrust potatoes into the limelight as a compelling, health-conscious, and nutritious food choice, both domestically and internationally.

Congress Theme:

As the leading networking organization for the global potato value chain, the World Potato Congress has chosen the theme “Old World Meets New” for 2024. This theme reflects the rich historical legacy of potatoes as a food staple, the cutting-edge innovation and technology applied to their production, and substantial investments in research and development. The focus extends to addressing global changes in sustainability, food security, climate, culture, and population dynamics.

The 12th World Potato Congress in

Adelaide presents a unique opportunity to share knowledge and breakthroughs in innovation, enhance industry productivity and sustainability, and review business trends across the global supply chain. Moreover, it serves as a platform to provide high-level insights into global trade, emphasizing the transformation of agrifood systems to ensure food access for the world’s most vulnerable populations.

Congress Program:

The World Potato Congress 2024 program promises an exciting and informative line-up covering all facets of the potato supply chain. Highlights include keynote addresses from global leaders in agriculture, in-depth panel discussions on sustainability and innovation, interactive workshops on cutting-edge technologies, and a showcase of the latest advancements in potato-related research and development.

Globally, potatoes play a vital role in sustaining food security and achieving

UN sustainability goals. To meet the Sustainable Development Goal (SDG 2) on Zero Hunger, a 28% increase in average agricultural productivity over the next decade is essential, aligning with the Paris Agreement targets on agricultural emissions—a more than triple increase compared to the last decade.

Congress Location:

The World Potato Congress will be held at the Adelaide Convention Centre, conveniently located in the heart of Adelaide. Situated just 15 minutes from the airport, the Adelaide Convention Centre offers easy accessibility, with over 3,500 accommodation rooms within a five-minute walk. This central and well-connected location makes it the perfect venue for the WPC in 2024. Besides the main program, post-Congress tour stops will feature Peter Cooper, a certified seed potato grower on Kangaroo Island, Mitolo Farms, a major potato producer and packer, picturesque wine regions, globally acclaimed research facilities at SARDI and much more. ☑



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Aussie potato growers first in world to access new fungicide

Australian potato growers are the first in the world to access significant new fungicide, Excalia, released by leading agricultural solutions company, Sumitomo Chemical Australia to fight the leading disease affecting production.

Excalia, developed by parent company Sumitomo Chemical Co, Japan to fight *Rhizoctoniasolani* (black scurf) will be Sumitomo's feature product showcased at the 12th World Potato Congress in Adelaide, June 23-26.

It was launched at premier trade show Hort Connections in Melbourne earlier this month, following extensive Australian trials and a rigorous regulatory process spanning the past decade.

"Excalia has proven to be the best defence against soil borne disease *Rhizoctoniasolani* and Yellow sigatoka, a key disease in bananas. It takes management of these diseases to a new level," Sumitomo Chemical Australia marketing and business development manager Jock Leys said.

He said the product generated much excitement at Hort Connections from growers in key potato-growing regions of Tasmania, Victoria and South Australia, and he expected a similar reception at the World Potato Congress.

Global product manager, Excalia, Takuya Inoue of Sumitomo Chemical Co, Japan, will join Sumitomo Chemical Australia as a special guest to share his insights and knowledge of the product with growers and congress delegates.

Leys said *Rhizoctoniasolani* was among a suite of five or six diseases and was widespread across the industry.

"It causes lesions and deforms tubers which can have a devastating impact on the marketable yield of an important crop for Australia which produces potatoes over some 30,000 hectares," he said.

"Potato farmers have been 'getting by' until now. We've completed three years of in-field screening and trials to ensure its efficacy.

"Growers who've tried it have reported a lack of lesions and an improvement in yield, with one in



Tasmania citing an increase in 18 tonnes to the hectare above the grower standard fungicide.

"It is applied as an in-furrow spray at the time of planting. Return on investment is high - with increases in economic return many times above the approximate \$50 per hectare to put it into the program," Mr Leys said.

The latest generation fungicide is synthesised at one of Sumitomo Chemical Japan Co's three discovery research centres, and shipped to Australia for domestic manufacture, packaging, and distribution. It is now available in commercial quantities.

Distribution partnership promising

Leys said Sumitomo's attendance at Hort Connections had shored up an important meeting with the potato team from leading agricultural supplier Elders to be held in Adelaide prior to the Congress.

"This is a significant step towards developing and streamlining the distribution of Excalia to Australian potato growers. Our objective is to ensure a smooth supply to the market. Growers are keen to learn more and start using it," he said.

Delegates are invited to visit the team at stand 36, at the World Potato Congress, Adelaide Convention Centre.

Sumitomo Chemical Australia will also share news of its USA-based subsidiary ValentBioSciences' acquisition of FBSciences - a recognised leader in biostimulants - and therefore Sumitomo Chemical Australia's foray into marketing biostimulants.

Three new broad-ranging biostimulants - Transit Duo, Zicron and GroMate will also be showcased as well as EndoPrime, a plant and soil enhancement product. It contains mycorrhizae, a beneficial fungi that naturally exist in soils.

Up to 1000 delegates from 40 countries are expected to attend the congress.

Established in 1998, Sumitomo Chemical Australia provides innovative solutions including a range of conventional and biological products for Australian agriculture, with a strong focus on horticultural production. It is a wholly owned subsidiary of Sumitomo Chemical Co, Japan which traces its origins back to the 1600s, and USA-based Valent Biosciences which produces a range of biologically derived, environmentally compatible pesticides and plant growth regulators. Based in Sydney, Sumitomo Chemical Australia has a team of sales and technical support personnel in key agricultural regions of Australia. ☒

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