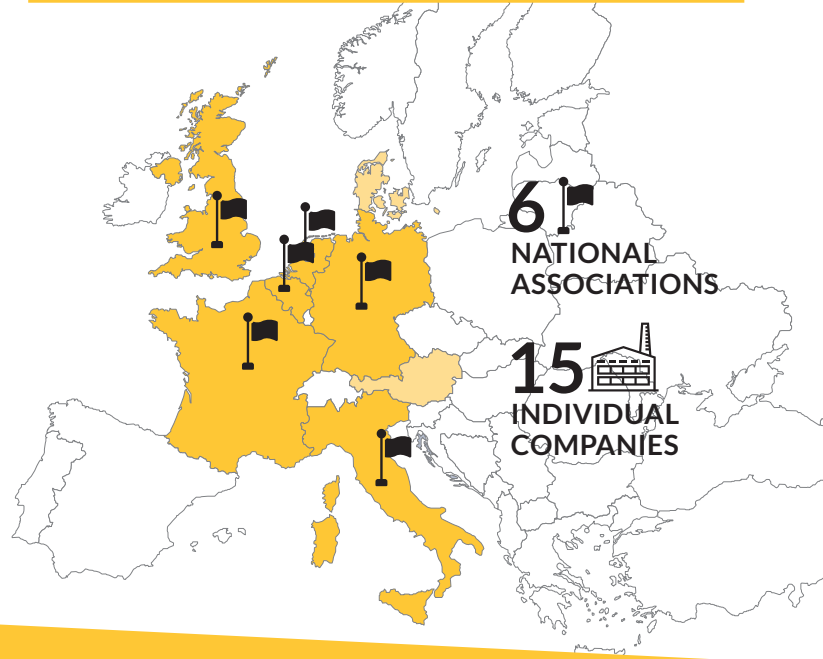


WHO WE ARE

EUPPA is the association representing the European potato processing industry. Its members are **6 national associations** based in Belgium, France, Germany, Italy, the Netherlands and the United Kingdom, as well as **15 individual companies** that account for more than **90% of Europe's processed potato production by both value and volume.**



NEW SOCIOECONOMIC CONDITIONS



People moving to urbanised areas



70% of the global population living in cities by 2050



Growing demand for high-quality, safe, tasty and convenient food

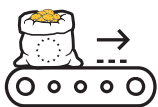


The potato processing industry is meeting the global demand



Potatoes are familiar and popular all around the world

EUROPEAN MARKET



19.5 MILLION TONNES

19.5 million tonnes of processing usage of potatoes



168 COUNTRIES

168 countries of EUPPA members' exports



€8 BILLION / YEAR

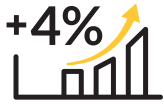
€8 billion per annum turnover and employs 24,500 people directly



€1,130 BILLION

€1,130 billion of fries export

GLOBAL MARKET



2-4% annually of expected growth



€11 billion of global processed potato trade



42 million tonnes of potatoes processed globally each year



Europe is the source of two thirds of frozen potato exported worldwide

(Source EU data: WorldPotatoMarkets).

FUTURE TRENDS

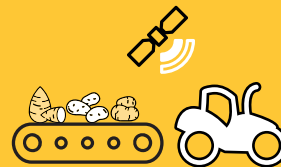
World demand for processed products is set to grow.



Production and world supply will still be dominated by a few **North American** and **European players** with new entrants including emerging markets like the Philippines, Indonesia and Chile



As the consumer trend towards new and healthy diets continues, **fries** will also need to ensure that they **remain relevant**

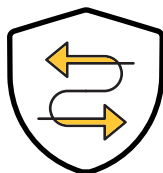


There will also be a trend of continuous **investment in our value chain** – including investment in **new potato varieties**, in **new machinery** and in **new productivity approaches** such as precision farming



International regulation and **stricter national barriers** could also serve to **restrict growth** in the dynamic potato processing sector

OUR ADVOCACY



As food manufacturers **we advocate for food security** as well as a **level-playing field around the world** and **equal access to markets**



We cannot achieve this without the **support of EU legislators** and **we call on them to support and defend the Agri-food industry** and to create an **environment that is fair and conducive to growing business** within Europe and beyond