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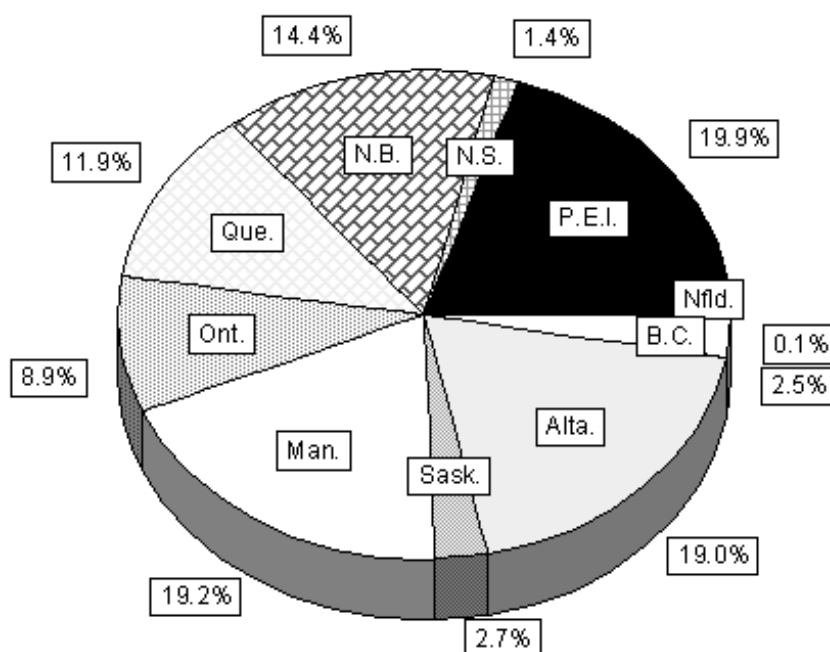
2001- 2002 CANADIAN POTATO - SITUATION AND TRENDS

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OVERVIEW

The potato is the most important vegetable crop in Canada, accounting for 35% of all vegetable farm cash receipts or \$720 million in the 2001 calendar year ([see Table 1](#)). In 2001, Canadian production at 4.03 million tonnes was concentrated in PEI (20%), Manitoba (19%), Alberta(19%) and New Brunswick (14%) (see Graph 1).

Graph 1: Potato Production 2001



Source: Statistics Canada

In 2001, 166,500 hectares (ha) were planted, a new record, but only 163,900 ha were harvested. Yields averaged 24.59 t / (ha), down about 14% from last year ([see Table 2](#)). Canada's 2001 total potato production is down 12% from 2000 because of the unusual combination of area lost due to drown out early in the growing year and very dry growing conditions throughout the summer and fall. Varieties of potatoes vary from province to province with Russet Burbank and Shepody being the main frying varieties; Superior, Atlantic and Snowden the main chipping varieties; Superior, Russet Norkotah, Chieftain, Yukon Gold, Kennebec, Norland, Ranger Russet and Red Pontiac are some of the leading table varieties. Over 140 varieties of seed are grown for sale in Canada by 798 seed potato growers on 31,740 ha, 13% more than in 2000.

CANADIAN SITUATION

The potato industry in western Canada will likely continue to grow with the announcement of a new Simplot fry plant planned for Manitoba in the spring of 2002. This follows the recent expansions in Alberta by McCain in 2000 and Lamb-Weston in 1999.

Production

The 2001/2002 crop is estimated at 4.03 million tonnes (88.8 million cwt) and 12 % less than the 2000 crop.

The 12% decrease in production was mainly due to lower yields in PEI, New Brunswick and Manitoba. Prince Edward Island was the hardest hit with its yield down 39%. Its 2001 yield went to 18.5 tonnes/hectare from 30.27 tonnes/hectare in 2000. New Brunswick saw a 8% decreasing in yield. Its 2001 yield went to 25.74 tonnes/hectare from 28.59 tonnes/hectare in 2000. A 7% yield down affected Manitoba. Its 2001 yield went to 25.74 tonnes/hectare from 28.07 tonnes/ hectare in 2000. As well, Manitoba lost 1,200 hectares to drown out. Alberta was the only major potato producing province that recorded a 15% production increase by 850 additional hectares. Planting also increased due to seed demand in Saskatchewan and processing demand in Alberta and Manitoba.

In 2001, Alberta had the highest average yield in Canada with 35.12 t/ha (314 cwt/ac). The Western region is for 2001 the leading region in Canada with 44% of production, followed by the Atlantic region with 36% and the Central region with 21% ([see Graph 1](#)).

In the 2000/2001 crop year, farm gate value (FGV) was down 2% and average prices were down 9% from a year earlier. However, average prices are expected to increase in 2001/2002 due to production decline in US with 13%, in Canada with 12% and EU with 8.6% from 2000/2001 following unfavourable climatic conditions. Processors will have to scramble in order to find enough potatoes to supply their customer's needs. Fryers may find themselves competing not only with fresh shippers, but also with dehydrators, for raw product.

Processing

Over 50% of potatoes grown in Canada are processed, mostly into french

fries. Ten to fifteen percent of the crop is utilized for chips and dehydration. Manufacturing, export and domestic shipments were up 3% in 2000/2001 for processed products from the previous year. Frozen french fry production is estimated at 1.1 million t, up 10% from 1999 reflecting the recent expansion in Alberta. Expansion has averaged 8% annually since 1990/1991. The new dehydration plant which opened in PEI in 1998 has increased production substantially in 2000-2001. If built in 2002, the J.R. Simplot plant in Manitoba would add 300 million lbs of frozen product in 2003 and eventually 20,000 acres of added production. This followed announcements by Lamb-Weston and McCain for new plants to be built in Maine.

Consumption

From 1971 to 2000, Canada's consumption of potatoes (fresh equivalent) has increased slightly from 71 kg per capita (KPC) to 74 KPC, about the same amount as all other fresh vegetables consumed. Chips have remained constant with some growth in the re-manufactured type made from dried flakes/granules. Consumption of french fries has dramatically increased over a 25 year period. This is the result of the rapid growth of Quick Service Restaurants, a busy lifestyle and new flavoured products.

TRADE

Canada's total exports of potatoes and products in 2000/2001 were \$837 million, while imports were \$204 million for a net positive trade balance of \$633 million. The export value of Canadian potatoes and by-products represented about 48 % of the total export value of potatoes and by-products and other fresh and processed vegetables. In 2001, Canada and US agreed on a set of conditions permitting potato shipments from PEI to US. Under a new agreement between Canada and China in 2000, Canada is the only country in the world authorized to export seed potatoes to China.

Fresh Potatoes

For 2000/2001, Canada's exports of fresh potatoes were 233,000 t, down 31% from 2000 ([see Table 3](#)). This was mainly due to large crops in the US and the EU.

Value of fresh shipments were \$72 million, down \$28 million from 1999/2000. Prices were on average 4.5% higher than the previous year due mainly to good demand for certain types and quality of potatoes.

In 2000/2001, Canada's fresh exports to the US were 191,000 t, valued at \$64 million, down \$23 million from 1999/2000. Other important fresh markets (\$million) were: Venezuela (3.0); Trinidad (1.2) and Cuba (1.1). Sales to Norway, Uruguay and Guyana were virtually halted due to low priced competition.

Fresh potatoes are imported every month of the year, all from the US and particularly in the period from March to July. Imports were down by 8% in 2000/2001 at 223,000 tonnes valued at \$94 million. California and Washington were the major sources of the imports. Average prices were 11% higher than in the previous year. Antidumping duties are still effective for two years on Washington State potatoes after an investigation by the

Canadian International Trade Tribunal determined that imports were priced below normal values.

Seed Potatoes

Seed exports decreased in 2000/2001 from 169,000 to 107,000 t, and by \$22 million in value to \$34 million(see [Table 3](#)). Most of this decrease was in shipments to the US, Thailand and Cuba. Shipments to the US accounted for \$27 million or 79% of Canada's exports. Other important seed markets in 2000/2001 in \$ million were Venezuela (2.2); Uruguay (1.6); Mexico (1.4); Cuba (.92) and Dom. Rep.(.19). Alberta was the largest seed exporter at 69,428 t followed closely by NB at 56,115 t, then PEI 14,928 t, BC 14,916 t and Sask 5,825 t.

Exports to Uruguay at 4,306 t, to Mexico at 1,825 t were respectively up from the 2,439 t and 527 t from the previous year. Canada exported to the Egypt for the first time in several years. Thailand has been a growing new market for chipping seed but any shipment has been sent in 2000/2001. In 2000/2001, Canadian imports of table and seed potatoes reached 235,000 t worth \$97 million. Almost all imports of table and seed potatoes are from the US. Total volume of table and seed imports represent 6 % of Canadian production.

Processed Potatoes

Exports of frozen fries continue to expand.

The consumption of fries is rising worldwide.

In 2000/2001, 637,000t of frozen french fries were exported for a value of \$651 million, an increase of 3% over 1999/2000 ([see Table 4](#)). Forecasts for next year are for a smaller increase as capacity is being reached. Canada is second only to the Netherlands as the leading exporter of frozen fries. Canada's fry processors are currently not contracting genetically engineered potatoes to comply with their customers' preferences.

Although most of Canadian exports went to the US for 87%, other major markets were Japan (6%), the Pacific Rim countries (7%), Latin America (3%) and the Caribbean. In all, frozen french fries are shipped to more than 90 countries around the world.

The US demand stems primarily from shifts in contracts with the fast food chains and backfilling shortages caused by strong export marketings from the US by the global companies moving product to their best economic/geographic advantage.

Canada imported \$23 million of frozen french fries from the US, an increase of 47% over 1999/2000. In 2000/2001, Canada also imported 39,000t of other potato products worth \$83million of which 19,000t were potato chips (\$56 million), 8% less than the previous year. Exports of potato chips to the US were up sharply by \$36 million due to regional shortages and industry consolidation.

UNITED STATES SITUATION

In 2001, US total production is estimated to be 20.2 million t, down 13.4% from 2000. Most of the decrease was in the western and mid-western states. This diminution resulted from the combination of the 8.4% reduction in area planted and the 9.4% (-2.47t/ha) yield decrease. Shortages of irrigation water, hot and dry weather during midsummer affected the yields. This is the smallest potato crop since 1995.

The farm value of the 2000 crop was US\$2.59 billion, down 5.6% over the previous year. The average price was US\$5.08, down 69 cents from a year earlier. Fresh market sales were up 1.7% but prices have declined. Prices for processing potatoes have remained unchanged for several years.

About 56% of the 2000 crop was processed and just 27% was sold as fresh table stock. Processors used 288 million cwt of potatoes from the 2000 crop, of which 60% was frozen (mostly as french fries), 18% was chipped, 19% was dehydrated, and the remainder canned or used to produce potato starch or flour.

US fry production continued to grow to 3.66 million t. with exports reaching 499, 000t in 2000-2001, an increase of 7.6% over the previous year. The five American major markets are Japan (45%), China/Hong Kong (12%), South Korea (7%), Mexico (7%) and Taiwan (5%). Imports of frozen fries (495,000t) were mainly from Canada. After a decade of record export gains, U.S. frozen potatoes fry exports continue to grow but at a lower pace. U.S. fry exports are forecast to increase 5% in 2001/2002.

Imports from Canada increased due to a favourable exchange rate, good product quality, proximity to Eastern & Midwestern markets and an increasing manufacturing capacity.

US per capita consumption in 2000 is stable at 62.93 kg (138.7 lbs). Frozen french fries and fresh usage remains steady.

EUROPEAN UNION SITUATION

The 2001 EU crop is estimated at 45.2 million t, down 7.4% from 2000 and 5.8% down from the five previous year average. The decrease was the combined effect of a 4.5% cut in production acreage and 4.4% down in yields. Exceptional cold and wet weather at the end of April hampered crop plantings in northern EU countries and had a negative influence on crop growth and on the yields. On top of that, rainfalls and wet weather during harvest may have compromised the storing-quality of the crops. The major producing countries the most affected are Netherlands, Germany and Belgium with crops 13.7% to 12.2% less than 2000 crops.

Potato market prices in EU countries are at more attractive levels than in the past two seasons, which were both burdened by a 49 million tonne harvest. However, the price increases had not been spectacular up to date in relation to the EU's crop in 2001 combined with both shortages in EU and North America. EU potatoes are very competitive on the export market due to the decline in the Euro compared to the US and Cdn dollar.

The Netherlands' exports of frozen potato fries increased by 10% in

2000/2001 compared to 1999/2000 to 1.3 million t. The increase in export volume was partly achieved by clearing stocks. For 2001/2002, Dutch exports are forecast to decline to 1.25 million t. as a result of the poor weather and reduced acreage.

Imports of fries and dehydrated potatoes from North America are down and exports will be more competitive and likely increase in a normal year basis.

McCain, the leading supplier of frozen potato products in the UK, announced that is investing in a new factory in the West Midlands.

WORLD POTATO SITUATION

According to the International Centre for Potatoes (CIP), of the Food and Agriculture Organisation (FAO) of the United Nations, potato production in developing countries entered a rapid expansion phase in the late 1990's. Annual potato production increased by 4.5% as area planted increased by 2.4%, double the rate of the past 20 years. This occurred as growth rates for maize, wheat and rice slowed, especially in Asia. Per capita consumption has declined in Europe since the 1960's to about 86 kg but it still leads, followed by North America at about 63 kg, Latin America at 24 kg, Asia at 14 kg and Africa at 8 kg. Per capita consumption is increasing in developing countries but also has considerably more growth potential with a younger population and increasing demand for chips and fries.

Production

As of 2001 the FAO reports that worldwide potato production was 304 million tonnes ([see Table 5](#)). China is now the world largest producer, followed by the Russian Federation. Also, developing countries produce more than 30 percent of world potato production which is up from only 11% in the early 1960's.

Asia

The CIP reports that world potato production has increased faster in Asia than anywhere else. Over the past 10 years annual growth rates were 10.6% in Indonesia, 6.2% in China, 6% in Pakistan and 4.6% in India.

Africa

80% of the potatoes in Africa are produced by Egypt, South Africa, Algeria and Morocco. Growth rates have been strong, led by Egypt at 5% annually. Expansion of irrigated areas has been the major factor, along with rising incomes and a demand for processed products.

Latin America and the Caribbean

Potato production continues to expand at 2.2% annually led by Peru at 3.7%, Mexico at 3% and Brazil at 2.8%. Mexico has also shown the greatest rate of increase in yield per hectare.

This growth in developing countries is expected to continue at between 2 and 3% based on recent trends. The potato will likely maintain its economic importance in the food basket for developing countries in the decades ahead.

Europe and the former USSR

In Europe and the former USSR, production continues to decline slowly at an average annual rate of one percent. In Eastern European countries, the decline is much faster as potatoes fed to livestock are rapidly being replaced by less costly grain. Poland alone has decreased its annual demand for potatoes for livestock feed by 6 to 7 million tonnes annually since the early 1990's.

North America

Until 1997, North America's potato economy had been growing at a rapid rate as a result of an expanding domestic fast food and institutional market for frozen french fries. Domestic demand spurred this industry in the early 1990's but this has now levelled off and export demand is the future growth area.

Recently, Canada has played a significant role in this expansion and now exports frozen fries to more than 90 countries. Canada ranks second to the Netherlands in frozen fry exports.

The US frozen fry industry has grown 4% annually since 1990. However, in 2001/2002 production is expected to decrease from 3.6 million tonnes to 3.5 million tonnes.

Exports are expected to rise from 499 tonnes to 525 tonnes (see [Table 6](#)). Most of these exports are to the Pacific Rim countries where fast food outlets have continued to expand.

GLOBAL FRENCH FRY MARKETS

In 2001/2002, frozen potato fry exports from three major exporting countries, the United States, the Netherlands and Canada, are forecast at a record 2.45 million t, similar to 2000/2001, but 8% above the 1999/2000 year's shipments.

The most significant change to the potato industry in the past 30 years has been the growth in consumption of french fries along with a decline in fresh potato use. This appears to be a function of higher disposable incomes and a more hectic lifestyle where people eat away from home more often due to time constraints. North America has led this trend followed by Europe and other developed countries. Fast food firms believe most of their future growth will be in the developing world and processing is expanding to keep pace in Eastern Europe, the former USSR, Argentina, Colombia, China and Egypt.

Good quality fries must be available in these markets to meet this demand. Initially, supplies are exported from existing plants, but eventually the companies tend to source local supplies and more countries will become processors. Rising incomes, tourism, microwave ovens, increased numbers of females in the workplace, urbanization and diversification of diets will stimulate further growth.

Positive benefits to this include more rural employment, more stable

markets and improved technology transfer. The use of pesticides, the planting of fewer varieties used mainly for processing, and nutrition concerns have become important issues. All these concerns are being addressed by research through the CIP and national programs in many countries.

OPPORTUNITIES & CHALLENGES

- Potatoes are the fourth most important food crop in the world with a global 304 million t. production in 2001.
- Canada's potato production at 4 million t in 2001 accounted for 1.3% of the world production. In 2001, Canada was the 13th largest potato producer in the world.
- The average size of Canadian potato farms continues to increase as processed demand increases and growers attempt to improve economies of scale.
- In Canada and many other regions in the world there is an increase in irrigated acreage to ensure higher yields and consistent quality for the expanding processing industry.
- There is increased use of on farm tissue culture, cuttings and micro tuber propagation as many seed growers attempt to reduce risks from diseases.
- Growth in production and demand from the developing world (eg. South America, Asia and Africa) should offer opportunities for Canadian seed production and processing technology/investment.
- There is scope for increased acreage and productivity improvement in many of the developing countries, particularly in the warmer climates.
- Improved storage facilities in many parts of the world will also enhance the profitability of the crop.
- Increased concentration at the processor and retailer level in Canada is a concern for growers wanting a more competitive market environment and improved prices after several years of input cost increases. Open market production must also decrease to avoid chronic oversupply situations.
- Recent phenomenon of concentration of Canadian and US wholesale and grocery retail chains is resulting in more powerful large purchasing units which intend to deal with only a few reliable and competitive suppliers of fresh potatoes. The concentration in the distribution is accompanied by a consolidation at the level of suppliers like processors and packers, meaning harder market access. This situation forces some growers, packers and shippers to form marketing alliances to cooperatively supply large volumes of product to specific retail and distributor accounts. Large supermarket chains and their suppliers have begun an initiative called "Efficient Consumer Response" which has led to new partnerships involving tighter contractual relationships with first line suppliers and distributors. This distribution approach maintains lean inventories, lower overall operating

costs and timely delivery of contracted/priced product to specific distribution centres.

- For the fresh market to grow it must become a more specialised niche market with new varieties, heritage varieties etc. New promotion, cooking and packaging ideas will also be needed. Fresh cut potatoes and prepared products are also a promising growth area for hotels, restaurants institutions and home use.
- Seed potato and fresh market trade will increase for niche market varieties. Opportunities exist for seed potatoes with northern vigour in warm climate countries to help improve yields.
- Fast food outlets continue to grow rapidly on a world wide basis. Most of this expansion will be outside of North America.
- Coated fries which are crisper and stay hot longer are also a growing trend which will increase demand for flour and starch inputs as well as increasing recovery rates.
- Aside from the globalization of the french fry industry there are increasing opportunities in snack products with healthier, low fat, no fat and baked snack food products in many flavours.

Research

- A solution for the control of late blight is essential for the long term success of the potato industry. An intensive cooperative global research program is under way to reduce fungicide use through breeding or other techniques.
- A virus reduction strategy has been implemented in seed production areas to improve seed quality, increase yield potential and improve profitability and competitiveness in domestic and export markets.
- In the long term, biotechnology can assist in improving disease and insect resistance and reduce pesticide use. It can also be used in the development or modification of varieties with improved nutrition or capable of incorporating vaccines for low cost immunization programs in some parts of the world. Many breeding crosses have been made in the US to examine additional health benefits in colored varieties which could have more than four times the antioxidant potential than current commercial varieties.
- In Canada, developers of GM potatoes have refocused their efforts toward the development of GM potatoes for biomedical purposes.
- The avoidance of genetically engineered varieties by major processors and retailers in order to protect market share will continue in the short term until the public becomes more educated about the issue.
- In the past, Agriculture and Agri-Food Canada (AAFC) has lead in all phases of developing new potato cultivars, a 12-15 year cycle. Growers, grower organizations and industry have been invited by AAFC to participate

in the cultivar release program in order to accelerate the transfer of new material to the industry. Commercializable clones identified during the testing phase would be allocated on an exclusive basis and royalties would be collected by AAFC.

- The Life Science Economy is based on our growing knowledge of living things and how this knowledge can address quality of life issues, as well as create a whole new range of products and services based on renewable natural resources.
- All potatoes are a good source of complex carbohydrates, potassium, vitamin C, folic acid and iron.

FACTORS AFFECTING THE FUTURE

- Rising energy costs and water shortages in North America may influence decisions on how much irrigated land will be in production and where and when processing plants will expand in the near term.
- Consumer groups and retailers in the EU and elsewhere are demanding reductions in the use of pesticides for production and protection of the environment.
- Insect and disease resistance and herbicide tolerance through genetic engineering will become an extremely valuable tool as part of Integrated Pest Management systems to reduce overall pesticide use, avoid crop losses and reduce the impact on the environment.

Regulations

- The Canadian and US Potato industries have agreed that the Canadian system of Ministerial Exemptions for the movement of bulk produce and US Marketing Orders are important in their respective countries and should not have an impact on trade. Discussions continue to reduce the impact of these programs.
- Opportunities for more post harvest testing for seed and fewer field generations continue to be examined.
- Harmonization of grade standards with the US is continuing and will reduce barriers to trade in the future.
- In the long term, the pesticide registration process is moving towards harmonization for North America leading to increased availability of safer materials and fewer competitive imbalances.

Market Access

- Border disputes with the US, regarding the quality of Canadian potatoes need to be resolved as objectively as possible to minimize trade disruptions.
- Phytosanitary agreements based on sound, objective scientific protocols need to be respected with existing and potential importing countries to secure trade possibilities in these markets.

Packaging & Labelling

- Retail and case coding requirements will increase costs for some sectors but will create overall efficiencies in the system. Large buyers in Canada and US will continue to insist on implementing these supply chain efficiencies.
- Varieties with modified genes are being regulated through labelling legislation and variety registration legislation in several countries to allow consumers to have a choice in the products they purchase.

CONCLUSION

The potato industry will continue to expand and become a more important food source throughout the world. Trade will continue to grow, particularly for processed products, higher valued and specialised products and for high quality seed required to produce crops for specific markets.

Web sites:

Statistics Canada.

<http://www.statcan.ca/english/freepub/22-008-UIB/free.htm>

Infohort

http://www.agr.gc.ca/misb/infohort/infohort_e.html

North American Potato Market News.

<http://www.napmn.com/>

USDA (United States Department of Agriculture)

<http://www.usda.gov/>

ERS (Economic Research Service) Usda

<http://www.ers.usda.gov/data/foodconsumption/>

FAO Statistical Databases

<http://apps.fao.org/default.htm>

Ce rapport est aussi disponible en français.

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1 tonne = 1000 Kg, 1.1 ton or 22 cwt)

1 ton = 2,000 lb (0.909 tonne)

1 acre = 0.40 hectare

1 hectare = 2.47 acres

Farm cash receipts (FCR)

FCR = Value based on a "calendar year"

Farm gate value (FGV)

FGV = Value calculated on any given "crop year".

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Revised - April 2002

TABLE 1**Potato Farm Cash Receipts (\$million)**

	1996	1997	1998	1999	2000	5 year avg. 1996- 2000	2001	% Change in 2001 vs. 5 yr. Avg.	% Change in 2001 vs. 2000
Canada	533	513	612	701	686	609	720	18	5
Prince Edward Island	138	129	173	192	155	157	126	(20)	(19)
Manitoba	92	94	105	119	107	103	128	24	20
New Brunswick	71	64	83	93	78	78	93	19	19
Quebec	73	69	66	85	94	77	97	26	3
Alberta	62	52	64	75	114	73	107	47	(6)
Ontario	49	58	55	63	65	58	72	24	11
British Columbia	24	20	25	36	34	28	52	86	53
Saskatchewan	18	18	34	29	27	25	35	40	30
Nova Scotia	7	7	6	8	10	8	8	0	(20)

Source: Statistics Canada

TABLE 2**Canadian Potato Production**

Province	1996/ 1997	1997/ 1998	1998/ 1999	1999/ 2000	2000/ 2001	5 Yr. Avg. 1996/1997 - 2000/2001	% Change 2001/2002 vs 5 Yr. Avg.	2001/ 2002	% Change 2001/2002 vs 2000/2001
Production ('000 tonnes)									
PEI	1285	1346	1322	1297	1323	1315	-39	808	-39
MAN	761	745	773	745	839	773	1	777	-7
NB	649	660	682	624	636	650	-10	584	-8
Québec	465	455	475	460	475	466	3	481	1
Alberta	377	401	431	556	671	487	58	769	15
Ontario	336	352	352	351	343	347	4	359	5
Canada	4085	4171	4329	4268	4555	4282	-6	4030	-12
Farm Gate Value (\$million)									
PEI	139	138	189	218	140	165	na	na	na
MAN	105	104	126	115	144	119	na	na	na
NB	68	68	86	103	92	83	na	na	na
Québec	69	69	74	84	86	76	na	na	na
Alberta	58	58	67	76	111	74	na	na	na
Ontario	54	54	63	61	62	59	na	na	na
Canada	546	491	605	736	718	619	na	na	na
Area Planted ('000 ha)									
PEI	45	45	45	46	44	45	-2	44	0
MAN	28	29	30	29	32	30	4	31	-3
NB	22	23	23	23	22	23	2	23	5
Québec	19	19	19	18	19	19	1	19	0
Alberta	13	13	13	17	21	15	43	22	5
Ontario	16	16	17	18	18	17	6	18	0
Canada	151	152	156	159	165	157	7	167	1

Source: Statistics Canada

PEI: Prince Edward Island

MAN: Manitoba

NB: New Brunswick

TABLE 3**Canada's Export & Import Markets**

Year	1997/1998	1998/1999	1999/2000	3 Yr. Avg. 1997-2000	2000/2001	%change in 2001vs 3 Yr. Avg.	%change 2000/2001 vs 1999/2000
EXPORTS('000 tonnes)							
Table stock	435.3	373.3	339.3	382.6	233.3	-39	-31
Seed	190.5	180.8	168.6	180.0	107.1	-40	-36
TOTAL	625.8	554.1	507.9	562.6	340.4	-39	-33
Value (\$million)							
Table stock	125.1	119.8	100.1	115.0	71.8	-38	-28
Seed	59.8	59.9	56.7	58.8	34.3	-42	-40
TOTAL	184.9	179.7	156.8	173.8	106.1	-39	-32
IMPORTS ('000 tonnes)							
Table stock	230.9	199.7	241.9	224.2	222.6	-1	-8
Seed	14.9	11.8	12.5	13.1	12.6	-4	-
TOTAL	245.8	211.5	254.4	237.2	235.2	-1	-8
Value (\$million)							
Table stock	94.7	81.7	91.6	89.3	93.7	5	2
Seed	4.2	3.4	3.7	3.8	3.8	1	3
TOTAL	98.9	85.1	95.3	93.1	97.5	5	2
BALANCE OF TRADE ('000 tonnes)							
Table stock	204.4	173.6	97.4	158.5	10.7	-93	-89
Seed	175.6	169.0	156.1	166.9	94.5	-43	-39
TOTAL	380.0	342.6	253.5	325.4	105.2	-68	-58
Value (\$million)							
Table stock	30.4	38.1	8.5	25.7	-21.9	-185	-358
Seed	55.6	56.5	53.4	55.2	30.5	-45	-43
TOTAL	86.0	94.6	61.9	80.8	8.6	-89	-86

Source: Statistics Canada

TABLE 4**Canada's Exports & Imports of Processed Potatoes**

Year	1997/1998	1998/1999	1999/2000	3 Yr. Avg. 1997-2000	2000/2001	%change in 2001vs 3 Yr. Avg.	%change 2000/2001 vs 1999/2000
EXPORTS ('000 tonnes)							
Frozen fries	454	527	621	534	637	19	3
Others	14	13	29	19	32	71	10
Total	468	540	650	553	669	21	3
Value (\$million)							
Frozen fries	418	512	636	522	651	25	2
Others	20	23	56	33	80	142	43
Total	438	535	692	555	731	32	-6
IMPORTS ('000 tonnes)							
Frozen fries	25	22	13	20	18	-10	38
Others	39	41	39	40	39	-2	-
Total	64	63	52	60	57	-4	10
Value (\$million)							
Frozen fries	29	27	16	24	23	-4	44
Others	86	87	86	86	83	-4	-3
Total	115	115	102	111	106	-4	4
BALANCE OF TRADE ('000 tonnes)							
Frozen fries	429	505	608	514	619	20	2
Others	-25	-28	-10	-21	-7	-67	30
Total	404	477	598	493	612	24	2
Value (\$million)							
Frozen fries	389	484	620	498	628	26	1
Others	-66	-64	-30	-53	-3	-94	90
Total	323	420	590	444	625	41	6
Others: dried, canned and salad potatoes							

Source: Statistics Canada

TABLE 5**World Potato Production (million tonnes)**

Country	1997	1998	1999	2000	2001	% change 2001/2000
China	57	65	56	63	60	-5.00%
Russia	37	31	31	34	35	1.00%
Poland	20	26	20	24	20	-16.00%
USA	21	22	22	23	20	-14.00%
India	24	18	24	25	25	-
Ukraine	17	15	13	20	14	-32.00%
Germany.	12	12	12	14	11	-20.00%
Belarus	7	8	7	9	9	-
Netherlands	8	5	8	8	8	-
UK	7	6	7	7	7	-
France	7	6	7	7	7	-
Turkey	5	5	5	5	5	-
Canada	4	4	4	5	5	-
Spain	3	3	3	3	3	-5.00%
Romania	3	3	4	3	4	10.00%
Iran	3	3	3	4	3	-18.00%
Japan	3	3	3	3	3	-
Bangladesh	2	2	3	3	3	-
Peru	2	3	3	3	3	-15.00%
World	302	299	298	325	304	-6.00%

Source: Food and Agriculture Organization of the United Nations

TABLE 6
World French Fry Situation (in '000 t)

Countries	Production	Exports	Imports
Canada			
1995/1996	650	233	12
1996/1997	775	345	12
1997/1998	860	448	28
1998/1999	910	516	24
1999/2000	1020	619	14
2000/2001	1050	634	17
2001/2002F	1090	670	15
Japan			
1995/1996	35	0	251
1996/1997	33	0	270
1997/1998	32	0	290
1998/1999	32	0	297
1999/2000F	32	0	320
Netherlands			
1995/1996	1,073	925	79
1996/1997	1,126	970	56
1997/1998	1,267	1,149	46
1998/1999	1,253	1,161	56
1999/2000	1,274	1,179	102
2000/2001	1,420	1,306	158
2001/2002F	1,350	1,250	125
USA			
1995/1996	3,254	350	160
1996/1997	3,382	386	249
1997/1998	3,284	425	339
1998/1999	3,566	473	366
1999/2000	3,498	464	465
2000/2001	3,664	499	495
2001/2002F	3,550	525	520

F: Forecast Source: USDA

<http://www.fas.usda.gov/http/circular/2002/02-01/Stats/pot.pdf>