

NAPMN Projects Big Increase in U.S. Potato Crop; Smaller Increase in Canada

Last month Ben Eborn at the North American Potato Market News (NAPMN) projected the **U.S.** 2023 potato crop to come in at 429.6 million hundredweight (cwt), more than 37 million cwt more than last year's unusually small crop. That would be a 9.5% increase.

The **North Dakota** crop is projected at 25.1 million cwt which is up 9.2% from last year. NAPMN projects **Minnesota** to be down 3.9% based on 2,200 fewer planted acres.

The **Idaho** crop is expected to be over 20% larger than last year at 145 million cwt, more than a 24 million cwt increase. **Washington** state is projected to produce over 7 million additional cwt this year.

The Canadian crop estimate was updated last week and **Canada** is expected to produce 126.5 million cwt, up 3.6 million cwt from last year, a 2.9% increase.

Look for the **Manitoba** potato crop to be nearly 8% larger at 28.2 million cwt compared to 26.1 last year. The Canadian Prairie Provinces will be up nearly 13% while the Maritimes are forecast to be down 4.3%.

While similar to the NAPMN figures, United Potato Growers of Canada predictions are as follows:

PROVINCE	Planted Acreage	ESTIMATED			PRODUCTION COMPARISON		
		Harvested Acreage	Yield	Production ('000 cwt)	2023 VS. 2022	2022	2021
PEI	83,500	82,248	320	26,319	-1.1%	26,600	27,209
NEW BRUNSWICK	53,000	51,834	310	16,069	-5.5%	17,000	18,200
NOVA SCOTIA	800	776	300	233	-3.0%	240	357
NEWFOUNDLAND	425	392	150	59	13.2%	52	55
TOTAL MARITIMES	137,725	135,250		42,679	-2.8%	43,892	45,821
QUEBEC	47,197	44,837	285	12,779	-13.9%	14,844	14,100
ONTARIO	37,700	36,695	230	8,440	3.4%	8,160	8,953
MANITOBA	81,000	80,757	350	28,265	8.1%	26,139	24,024
SASKATCHEWAN	7,300	7,285	240	1,748	20.6%	1,450	1,519
ALBERTA	80,000	79,600	395	31,442	17.3%	26,813	24,614
TOTAL PRAIRIES	168,300	167,642		61,455	13.0%	54,402	50,157
BRITISH COLUMBIA	5,000	4,950	330	1,634	2.1%	1,600	2,080
TOTAL CANADA	396,922	389,374	326	126,987	3.3%	122,898	121,111

Prince Edward Island

PEI has experienced a great deal of rain this summer and up to 100 mm in some areas during the first two weeks of September. Although the effects of Hurricane Lee were certainly less than expected, the ground is still very wet. Many growers continue to harvest and ship out of field with expectations of starting storage harvest perhaps next week, weather depending. Most areas are still on high alert for blight, but there are no confirmed cases. With wet ground and temperatures cooling at night, there are concerns about potential issues during harvest. Overall, the crop is looking good, but not as good as last year when it was almost an ideal season. Yields appear to be tracking a bit behind last year and we estimate a 320 cwt per acre average yield for the province, still higher than the 5 year average. This combined with an estimated harvested acres figure of just over 82,000, that would peg production for the island at an estimated 26.3 million cwt, down 1.1% from 26.6 million cwt in 2022. It is important to note that weather through harvest could impact the number of abandoned acres, we will continue to monitor and provide another update in October.

New Brunswick

The province has also had quite a lot of rain over the growing season but has started to get sunny in the latter part of this week and the forecast is for more sun next week and warmer temperatures. However with the very wet ground growers have been struggling to get into the fields. The expectation is that they will be able to get into the fields in earnest starting the 22nd. The early crop has not shown great quality, with issues of hollow heart and rot due to the excess rain. Expectations are of an average to slightly below average yield and a low set. With this in mind, we have estimated abandoned acres at around 1,100, and an average yield of 310, below last year but still above the 6 year average. This would give an estimated 16 million cwt in production for the province, approximately 940,000 cwt below last year's good crop.

Quebec

The growers are now into full harvest mode with estimates of about 15% completed. With the excessive rain throughout the summer, as recently as this Tuesday, there is expected losses of at least 10%, with some predicting even more depending on the

area. The crop is decent overall but growers are still reporting expectations of up to 15% off on yields and concerns about storability if weather conditions don't improve during harvest. Gradeouts are predicted to be up with misshapen and hollow heart issues, although round varieties seem to be faring better than the russet crop. The processing sector acreage is having some of the same issues with yields and quality as the fresh sector, however the northern fields, particularly in the seed sector report much better conditions. With upwards of 2,300 acres expected to be lost for various reasons, and a yield expected to be off by up to 10-15% on average, we are estimating a much lower production for Quebec this year at just under 12.8 million cwt. Although lower by almost 2 million cwt when compared to last year and even 2021, this production number is still on track with the 5 year average in the province.



Ontario

Harvest weather in Ontario has been great and things are ramping up, quality so far is very good but not outstanding, there may be some potential issues in storage due to moisture with so much rain through the summer. The Simcoe/Delhi area has seen excellent yields and quality from the early crop, the Alliston area with heavier soil is still reporting a good crop however there have been some cases of late blight. Our expectation is that growers will harvest 36,695 acres and although that is less than in 2022 combined with a better expected average yield of 230, production for the province is estimated to be up just over 3% for this season at approximately 8.4 million cwt.

Manitoba

Harvest in the province is going very well with estimates of just over 50% done. Quality is very good but yields in the fresh sector are estimated as average to perhaps below average depending on the field. The dryland regions have had their driest year ever with perhaps 1" of rain all summer in certain areas.

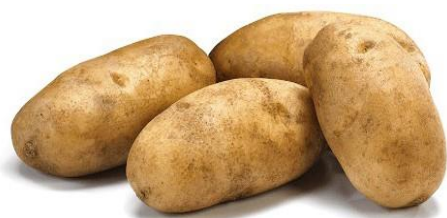
Irrigated fields have faired better reporting a good, but not fantastic, crop with lower sets. In the processing sector the crop has been very good, with growers reporting great quality and good size profile. Harvested acres, average yield and production predictions are all up for Manitoba this year compared to last, and if all comes to pass we are expecting a record production of 28.2 million cwt for 2023.

Saskatchewan

Harvest is estimated to be just over 50% done, with nearly ideal digging conditions, could be finished in about 10 days. The province is reporting a good crop with above average quality, however dryland areas have had poorer results due to such a hot and dry summer. There were some struggles keeping up with water supply in the irrigated areas as well but it does not seem to have had an impact on the yields. We have targeted an average yield of 240 for the province and combined with 7,285 acres harvested, we would estimate total production to be 1.7 million cwt, up just over 20% from last year.

Alberta

Alberta is reporting harvest to be close to 65% complete and may be finished as early as next week. Reports are of a big crop with good yields overall, sandier ground of course impacted by such a dry and hot summer, but the heavier ground is doing very well. Water supplies for irrigation in southern Alberta, where the majority of the processing crop is grown, did become tight through August but were sufficient to pull through until the start of harvest. Temperatures have cooled off recently but there has still been very little rain. Reports are very positive for the seed crop as well, with good yields and excellent quality. With planted acres up in the province over last year, we also expect harvested acres to be up as well, around 79,600 acres this year. Combined with good yield predictions of 395 UPGC estimates overall production in Alberta to be just shy of 31.5 million cwt, a 17% increase over last year.



British Columbia

The province has experienced the warmest and driest summer in memory, with only about 2 inches of rain from April until now. Harvest is going very well, despite the on-going drought conditions. There have been a few small showers, enough to keep the dust down. But temperatures have remained warm. Storage about 60% complete and should be done in the next 10 days or so. Better than average crop reported both in yields and overall production.

United States: US fresh-potato shipments for the 2023-24 marketing year are forecast at 89,880 million cwt, 35,000 cwt more than the August forecast, and exceeding the 2022-23 marketing season shipments by 7.845 million cwt. Imports from Canada are expected to reach 6.600 million cwt for the 2023-24 marketing year, much lower than the 8 million exported in 2022-23. It is important to note however, that raw potatoes exported from Canada but destined for processing in the U.S. did get included in the fresh export numbers. However, there was still an increase of at least 1 million potatoes exported to the US during the 2022-23 marketing year. With the size of the crop expected out of Idaho this season, we are not predicting nearly the same level of exports into the US in 2023-24, in fact we are already seeing pressure from strong movement of potatoes out of field in the Columbia Basin and Idaho. With almost the same number of planted acres in Idaho alone as in the entire country here in Canada, it is no wonder that the state has a heavy impact on the russet market across North America.

US POTATO PRODUCTION					
(Million Cwt)					
	-----2023 ↑-----				Change
	2021	2022 *	Aug	Sep	from '22
California	11.05	7.73	9.50	9.60	24.2%
Colorado	21.48	21.12	21.30	22.10	4.6%
Florida	5.40	4.96	6.20	6.20	25.1%
Idaho	132.09	120.75	145.00	146.60	21.4%
Maine	18.39	18.06	18.10	18.10	0.2%
Michigan	19.35	16.47	18.20	18.20	10.5%
Minnesota	17.55	20.08	19.30	19.30	-3.9%
Nebraska	9.26	9.65	10.00	9.90	2.6%
North Dakota	22.50	23.00	25.10	24.80	7.8%
Oregon	26.28	24.94	24.00	24.00	-3.8%
Texas	5.52	7.19	5.40	5.20	-27.7%
Washington	91.93	90.38	99.00	99.00	9.5%
Wisconsin	29.03	27.93	28.50	28.80	3.1%
US Total	409.83	392.24	429.60	431.80	10.1%

* Subject to revision in USDA's Potato Annual Report - Sept. 27, 2023
 † NAPM forecasts on 8/3/2023 and 9/7/2023

European Update

- In Europe, Dutch potato yields are very good, although disastrous in the southwest early on the kilos have increased greatly since.
- Europe in general is not seeing the same price drops we are seeing in North America, however they are seeing late blight in many areas.
- Dutch potato growers are facing a dilemma this September because their crop is too small to dig up ahead of the October 1 deadline. From 2023, potatoes grown on sandy soil must be harvested by October 1 to prevent harmful nitrates and nitrogen compounds from entering the groundwater, in line with a European directive. However, the cold, wet spring meant that many farmers did not plant out their seed potatoes until late May, rather than late April.
- NEPG estimates 23 million tonnes of earlies and maincrop for 2023 which is 1.3 million tonnes over last year and comparable to the 2021 crop. Lower production in Poland and southern Europe due to lower planted acres and bad weather. They continue to see a switch from table to processing acres.

Keep Your Eye on the Market

Canadian Potato Market Monthly Conference Call

Via Zoom

Next scheduled: Thursday, October 19, 2023

Registration now open for the Potato Business Summit!



Potato Business Summit

Wednesday, January 10, 2024 Austin, Texas

Registration opens September 15 at PotatoBusinessSummit.com



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