



SUMMARY

The United States has witnessed significant shifts in international seed market standards, increased transportation costs, and travel restrictions. Still, international partnerships flourished, sales persisted, new varieties were registered, and trial operations expanded, reflecting a growing interest in U.S. seed potatoes.

CUBA TRIALS PART 1: A BRIGHT FUTURE

The potato trade between Cuba and the United States stagnated for at least a decade. Recognizing Cuba's fertile soil and increasing demand for quality seed potatoes, Potatoes USA pursued export opportunities for United States seed growers. Potatoes USA has engaged in dialogue with Cuba's agricultural stakeholders, leading to a Memorandum of Understanding in 2017 between the U.S. and Cuban Departments of Agriculture, fostering cooperation in agriculture for the first time since tensions between nations arose.

In March 2017, a delegation from Potatoes USA, consisting of 11 U.S. Potato Growers, five industry representatives, and a member from their Cuban Consulting program, visited Cuba. They engaged with key agricultural groups to align trial objectives and strengthen trade relations. Following positive interactions, Cuba agreed to plant ten California-produced potato varieties for the first time in December 2020.



continued on next page



In this Issue

- Summary
- Cuba Trials Part 1: A Bright Future
- Cuba Trials Part 2: A Successful Visit
- Nicaragua Trials: Growing Stronger
- Future Trials: Panama, Honduras & Beyond
- Reverse Trade Mission Preview
- Potato Expo Recap



Objectives

- Engage potential U.S. seed buyers in new countries and deepen existing market relationships
- Conduct field trials to validate variety performance in the targeted country
- Register new varieties in target markets
- Educate international markets on how to utilize each variety optimally to increase the chance of continued purchases
- Support grower extension and technical training
- Address market access issues



Continued: Cuba Trials Part 1: A Bright Future

The second year of trials was relatively uneventful. The third year encountered hurdles. Seven California-sourced varieties were rejected in Cuba due to the detection of PVYntn. Despite timely notification from the U.S., communication mishaps, including messages sent to inactive email accounts, led to missed planting opportunities.

Potatoes USA collaborated with FAS and APHIS to address these setbacks to enhance phytosanitary testing protocols, aligning them more closely with Cuba's standards. Hunter Gibbs from North Carolina played a pivotal role by establishing a seed grow-out site with logistical advantages to export to Cuba. Seed for grow-out is being sourced in northern-tier U.S. states. A North Carolina Seed Certification program was established in March 2023. Subsequent shipments to Cuba in December 2023 laid the groundwork for the upcoming harvest in March 2024.

Ciklamen's late sprouting caused delays in planting., Eva was a positive surprise, with robust canopy growth. Golden Globe marched through a third year of trials with the potential for export by Fall 2025. Golden Globe has also succeeded in trials in Nicaragua and Panama, creating export collaborations across multiple markets.

Looking ahead, selections for the 2025 Cuban trials aim to mimic Golden Globe's path to commercialization. Through this partnership, Potatoes USA endeavors to enhance export opportunities for U.S. growers while contributing to sustainable development within the seed sector of Cuba. This collaboration is a diplomatic model, showcasing the advantages of communication, cooperation, and shared objectives, ultimately fostering mutual benefits for Cuban and American potato growers.



CUBA TRIALS PART 2: A SUCCESSFUL VISIT

Cuba boasts a robust seed potato market, with an impressive average import of over 15,000 MT (330,000 cwt) of seed potatoes over the last five years. Despite the market's complexity, including various quarantine pests and regulatory processes, there's a promising opportunity for growth. Despite challenges such as limited shipping options and a short growing season due to high temperatures in March, Cuba remains a vital importer of agricultural goods from the U.S., with exemptions in place even amidst governmental sanctions.



In March 2024, a positive collaboration occurred as Hunter Gibbs, a seed potato exporter from North Carolina, alongside Tommy Fleetwood, the Managing Director of the North Carolina Potato Association and Potatoes USA Consultants, visited Cuba. During fruitful discussions with government officials, Alimport, and local potato growers, Potatoes USA provided valuable insights into the U.S. seed potato certification system, U.S. phytosanitary standards, and diverse U.S. potato varieties.

Despite some setbacks during the visit to Cuban experimental stations, where varieties were planted late, there were notable successes. Several varieties, including Golden Globe, Soraya, Eva, and Alegria, received positive feedback from Cuban counterparts. Eva particularly impressed with its vigorous foliage, covering rows effectively, while Soraya exhibited the best yield potential. Alegria and Golden Globe showed promise for further trials next year, with Golden Globe set to undergo its fourth trial in November 2024. Should Golden Globe succeed in this trial, it could open doors for commercial shipments as early as November 2025, marking a significant milestone in the partnership between Cuba and U.S. potato exporters.



NICARAGUA TRIALS GROWING STRONGER

From 2008 to 2015, Potatoes USA registered 13 U.S. varieties for seed sales to Nicaragua. Between 2012 and 2021, U.S. seed growers responded to seed requests and sold an average of 927 MT annually to Nicaragua, primarily with Granola and Soprano varieties. The pandemic halted U.S. seed sales as demand for potatoes plummeted due to economic hardship in Nicaragua. Now that the pandemic is over, demand for seed potatoes in Nicaragua is building back. U.S. growers no longer grow the preferred export varieties, Granola and Soprano, so Potatoes USA has started registering additional varieties again.



2023 was the first variety trial for U.S. seed potatoes in Nicaragua since 2014. In March 2023, a variety trial was planted with Soraya, Lehigh, Eva, Golden Globe, Natasha, and Satina. March is Nicaragua's dry season, so the pressure from psyllids (*Bactericera cockerelli*) was intense. The psyllids brought on strong infections of purple top and zebra chip to all the varieties. Harvested in June 2023, none of the varieties had record-number yields, but the yields were good enough to get Lehigh, Eva, and Golden Globe approved for registration in November 2023.

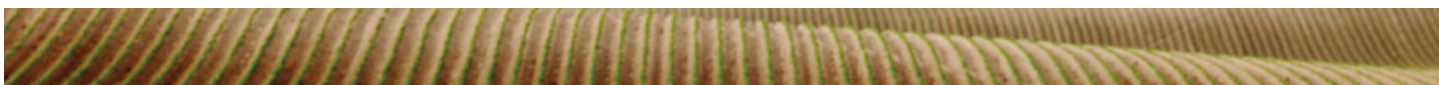
The timing of the variety registration was promising, as prices for potatoes in Nicaragua are quite high. There is keen interest from seed potato importers to import in 2024. At least 25 MT of U.S. Golden Globe should be delivered in September 2024. In addition, other importers are interested in the variety Soraya. Nicaraguan importers hope to import more U.S. seed potatoes once they look deeper at the portfolio of U.S. varieties. One Nicaraguan importer is scheduled to visit the U.S. during the Reverse Trade Mission in July/August 2024. Once Nicaraguan growers can see the quality of U.S. seed, there should be more demand for Golden Globe and other U.S. varieties in 2025. It's promising that U.S. seed exporters are poised to expand their market presence, aiming to achieve or surpass the sales volumes they've previously attained in Nicaragua.

FUTURE TRIALS: PANAMA, HONDURAS & BEYOND

Panama is not a large seed potato market, but Panamanians are interested in importing seed potatoes from the U.S. One year of trials has been completed, and the results sparked shipment requests. Potatoes USA is exploring setting up trials in Honduras, Guatemala, and Nicaragua to add more varieties with export potential for U.S.-certified seed growers. Before 2023, Granola was over 90% of the potato acreage in Panama. Granola is well adapted to the tropics, with pale yellow flesh and a round, oval shape. It is known to potato growers as a good rainy-season variety that resists late blight but also blackleg, golden nematode, PVY, and PLRV. Granola is the only potato variety worldwide with field resistance to bacterial wilt. In Panama, like many tropical countries, bacterial wilt is common. Granola also stores well in the open air for three months and transports well over long distances. Potatoes USA tried between 2001 and 2007 to replace Granola without success. It is a challenging variety to replace, but that is what Potatoes USA needs to do. The U.S. no longer grows Granola, and Europe is severely reducing acreage, so Panama needs to find an alternative variety.

Panama has been importing between 250 and 1250 MT of seed potatoes annually since 2012. They are not a big market, but it may grow, depending on circumstances. From 2012 to 2021, U.S. seed growers have sold between 100 and 420 MT, averaging 200 MT annually. Currently U.S. seed growers do not sell any seed potatoes to Panama. Most of the other imports come from Canada and the European Union.

In February 2023, Potatoes USA sent six varieties to Panama for variety registration trials. The replicated trials were conducted by IDIAP, the government's agricultural research branch in Cerro Punta, the main potato growing area. Soraya, Lehigh, and Golden Globe had statistically higher yields than Granola in the trial. IDIAP gave its approval for importing these three varieties. Importantly, IDIAP only approved but did not register the varieties. Approval is a temporary measure; registration is more permanent. Two importers have taken advantage of the opening given by IDIAP and are trying to import Golden Globe and Soraya from the U.S. in August 2024.



REVERSE TRADE MISSION PREVIEW

Potatoes USA will host a Reverse Trade Mission from July 29th to August 2nd. Kicking off at the Potatoes USA headquarters in Denver, attendees will engage in presentations led by key industry figures. Topics covered will include breeding, seed certification, variety selection registration, and other pertinent subjects to inform our guests about U.S. seed's advantages.

Among the attendees will be international guests from Nicaragua, Panama, Honduras, and potentially other countries. Moreover, U.S. growers interested in exporting will have the opportunity to receive education and insights into the export process, potentially bolstering the industry by expanding the pool of seed growers capable of exporting to our target markets. After Denver, participants will journey to Washington and North Carolina for field visits, offering hands-on experiences to deepen their understanding of the U.S. potato industry.



POTATO EXPO RECAP

The Seed Task Force convened in vibrant Austin, Texas, during the exciting 2024 Potato Expo hosted by the National Potato Council. A diverse array of attendees, including passionate seed growers, dedicated producers, innovative researchers, and forward-thinking industry representatives, united to celebrate the accomplishments of the past fiscal year. In addition, the group discussed future events and opportunities. Following the meeting, numerous growers expressed keen interest in expanding their horizons through seed exports. Excitement mounts for the upcoming Reverse Trade Mission in July/August, poised to seamlessly connect these enthusiastic exporters with market and sales prospects, paving the way for mutual growth and success.



REVERSE TRADE MISSION

July 29 – August 2, 2024

DENVER, COLORADO

Topics include breeding, seed certification, variety selection registration, the export process, and other pertinent information regarding the U.S. potato industry

