EUPPA
European Potato Processors' Association











THE POTATO'S SUSTAINABILITY JOURNEY

EUPPA Sustainability Factsheet



METHODOLOGY

This factsheet is based on information provided by all 14 EUPPA member companies through a sustainability questionnaire conducted between April and June 2026.
Data covers key sustainability topics across the potato processing value chain and is based on FY2024-2025 data or the most recent available reporting year.
Results are presented in aggregated form only and illustrate sector-level trends rather than individual company performance.

The information presented reflects aggregated responses provided by EUPPA members and has not been independently verified by EUPPA. Sustainability practices, performance and implementation levels vary among individual companies and facilities.

THE POTATO'S SUSTAINABILITY JOURNEY

A potato may look simple.
Yet every processed potato carries a wider story: of growers and soil, of people working across the sector, of factories and energy, water, packaging, side streams and responsible supply chains. Behind each product is a system that keeps improving, step by step, as EUPPA members work with growers, use resources more efficiently, reduce environmental impact and strengthen responsible practices across the potato value chain. And at the end of that journey are consumers enjoying potato products in all their forms.

Sustainability in potato processing is not a single achievement, but an ongoing transformation.

EUPPA - the European Potato Processors' Association at a glance

- Represents Europe's potato processing industry
- Brings together 14 individual companies and 6 national associations
- Covers more than 90% of Europe's processed potato production in both value and volume

Sustainability in action by EUPPA members

- Long-term commitment to sustainability
- Environmental and social responsibility across the value chain
- Support for a competitive and resilient food system
- Continuous improvement and innovation



A simple potato. A complex system behind it.
A sector moving from action to transformation.

INDUSTRY FACTS

€9.8 BILLION/YEAR
Turnover

7.5 MILLION TONNES
Annual volume of production of French fries and potato-derived products

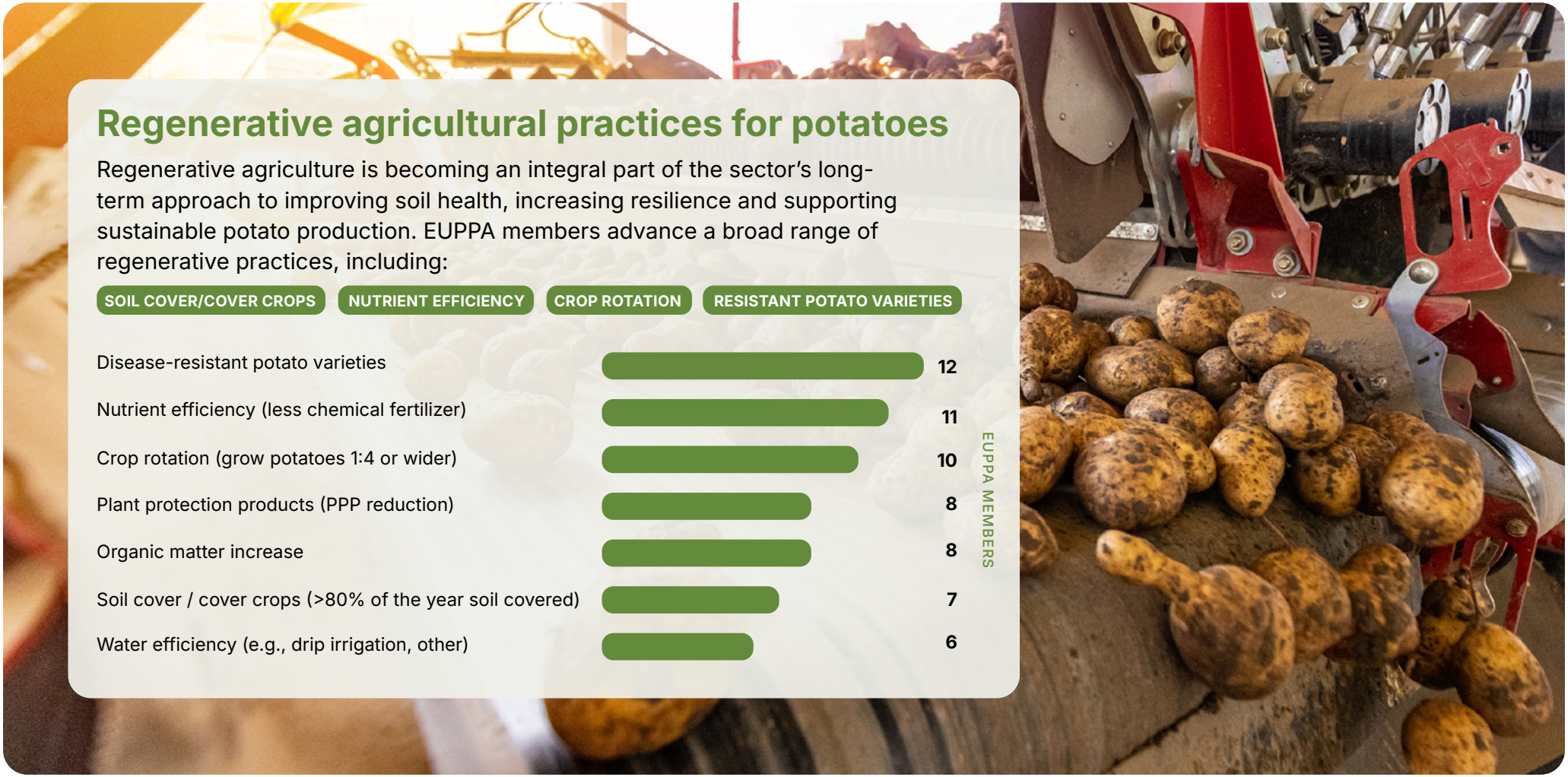
7.3 KG/CAPITA
Average annual EU27 consumption of French fries and potato-derived products

25,000 DIRECT & INDIRECT EMPLOYMENT
Across processing, farming and the wider supply chain

IN THE FIELD

WHERE SUSTAINABILITY STARTS

For potato processors, sustainability starts with decisions made throughout the potato growing cycle, where collaboration with breeders and growers helps shape environmental, social and economic outcomes of their products.



Regenerative agricultural practices for potatoes

Regenerative agriculture is becoming an integral part of the sector's long-term approach to improving soil health, increasing resilience and supporting sustainable potato production. EUPPA members advance a broad range of regenerative practices, including:

SOIL COVER/COVER CROPS | NUTRIENT EFFICIENCY | CROP ROTATION | RESISTANT POTATO VARIETIES

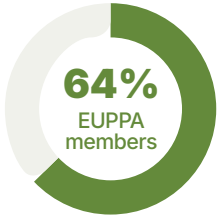
Farmer engagement and support

EUPPA members work closely with growers through practical support, knowledge-sharing, innovation trials and structured programmes, fostering more sustainable potato production across the supply chain.
Members combine field support, innovation trials, knowledge-sharing and structured programmes to advance sustainable and regenerative practices. Financial incentives also help growers invest in change. Potato processors most commonly provide premiums per hectare for implementing regenerative practices, sometimes linked to KPI outcomes, while others facilitate reduced interest rates with banks, certification-related bonuses, equipment discounts, or multi- season contracts with growers.

Grower support



Field support in daily operations
variety selection, growing, harvesting, storing



Knowledge support / sharing best practices
agronomy, regenerative agriculture techniques



OUR CHALLENGES

Potato growing in Europe is facing increasing legislative pressure and is confronted with the impact of climate change, water shortage, declining soil health, rising input costs and market volatility. Advancing sustainable and regenerative agricultural practices offers an opportunity to strengthen soil health and resilience, while helping both farmers and processors remain competitive and secure the long-term future of the European potato value chain.

OUR SOLUTIONS

Regenerative agricultural practices can help address these pressure points: In the potato sector, the successful implementation of such practices requires long-term planning, investments and close cooperation between growers and processors. Stable and fair contracts give growers the predictability needed to manage costs, plan production and invest in sustainable practices, while enabling processors to support innovation, soil health, climate resilience and supply-chain security.
This cooperation can also help enable investment in and the wider adoption of modern agricultural practices and technologies at farm level.
Innovation in particular is essential to secure future potato supply. Continued investment in breeding, research and certified seed potatoes including through New Genomic Techniques (NGTs), can help develop more resilient, resource-efficient and future-proof varieties enabling growers to respond to climate change, pests and diseases while maintaining productivity and sustainability.
EUPPA supports a fair and resilient agri-food chain where all actors can thrive, based on market-oriented partnerships, mutual trust and shared responsibility. Long-term processor–grower cooperation helps translate EU sustainability objectives — including the CAP Strategic Plans, Soil Monitoring Law, Nature Restoration Regulation and Carbon Farming framework — into measurable improvements at field level.

INSIDE THE FACTORY

WHERE TRANSFORMATION HAPPENS: SMART AND SUSTAINABLE PROCESSING

Once potatoes enter the processing plant, the sustainability journey becomes one of smart transformation. EUPPA members invest in advanced processing technologies that drive efficiency and minimise waste, while reducing energy consumption and conserving water and other resources. Processing plants increasingly recover heat, reuse resources and enable cleaner energy solutions. Across the sector, plants move towards closed-loop production wherever possible.



~80%

1.2 MW median | 0-26MW

On-site solar PV

Renewable energy is an important part of reducing the environmental footprint of potato processing sites. On-site solar PV helps potato processing sites reduce fossil-based energy use, strengthen energy resilience and support cleaner operations. Nearly 80% EUPPA members have on-site solar power to generate renewable electricity, while others plan deployment in the short term. **EUPPA members report a median solar PV installation size of around 1.2 MW, with capacity ranging from 0 – 26 MW.**

85%

Scope 1+2 GHG | emission reduction targets

From efficiency to climate transformation

The sector's sustainability journey does not stop at improving efficiency. Potato processing companies are increasingly moving towards structured and long-term climate commitments, using innovation to drive efficiencies across their businesses and support more sustainable production models.

Nearly all EUPPA members (85%) have public Scope 1+2 GHG emission reduction targets, with 4 having science-based (SBTi) targets, and other still developing their targets. Among members with public targets, approaches are evenly split between absolute and intensity-based reductions, with most targets set for 2030, reflecting a clear focus on near-term decarbonisation.

Inside the factory, sustainability is integrated in every loop: residual heat captured, process water reused, energy use optimised and resources kept in motion.

Recyclable packaging

Primary and secondary packaging are already widely recyclable across the sector. Around 71% of EUPPA members report fully recyclable primary packaging (e.g. bags), rising to 86% for secondary packaging (e.g. cardboard boxes).
Recycled content differs significantly between the two packaging types. Based on the midpoint of the reported ranges, primary packaging contains an estimated average of approximately 0.5% recycled content, compared with 71.9% for secondary packaging.
Packaging therefore remains an important area for continued improvement. EUPPA members work to optimise material use, increase recycled content where technically and legally feasible, and reduce unnecessary packaging.

Recyclability of primary and secondary packaging



Recycled content in secondary packaging



>75% recycled content (7 EUPPA members)

25–74% recycled content (3 EUPPA members)

1-24% recycled content (1 EUPPA member)

OUR CHALLENGES

Transforming processing plants requires substantial investment by companies, but it also relies on enabling energy infrastructure and technologies beyond their direct control. Increasing grid congestion in several European countries can delay new or reinforced connections, limiting the electrification of production processes, the installation of electric heat solutions and the integration of on-site renewable energy. At the same time, the availability, commercial maturity and cost-effectiveness of low-carbon industrial heat technologies vary between applications and locations.

OUR SOLUTIONS

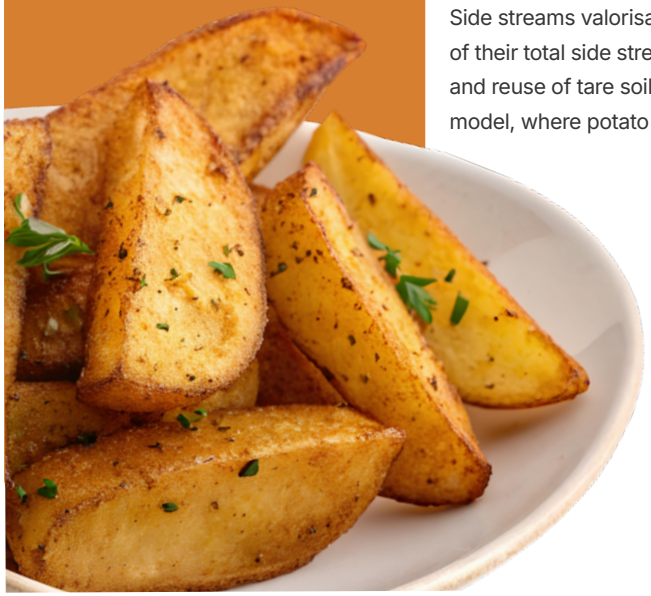
Progress on sustainable energy solutions, recycled content in secondary packaging and structured climate commitments shows how the European potato processing sector contributes to EU climate, energy and circular economy objectives. EUPPA members embrace sustainability as part of their long-term strategy, while underlining that environmental ambition must remain aligned with industrial resilience, food security and competitiveness.
Across the sector, companies reduce reliance on fossil-based energy by improving efficiency, investing in cleaner energy sources and, where feasible, generating renewable electricity on site. Accelerating the transition requires coordinated action by industry, technology providers, grid operators and public authorities to expand network capacity, facilitate connections and bring scalable clean-energy solutions to market.

RESOURCE CIRCULARITY

KEEPING RESOURCES IN THE LOOP

As potatoes are processed, the sustainability story continues through the resources generated along the way. Peels, starches, process water and residual heat are not simply outputs from production: they are resources to be kept in use. EUPPA members keep more value in the chain by reducing losses and making sure that every usable part of the potato is put to good use. European potato processors send zero waste to landfills and invest in turning side streams and potato processing side streams into food, feed or bio-based materials.

What remains after processing is not the end of the potato's journey - it is the start of its next use.



~86%
of members
report full or near-full valorisation

Material valorisation

Energy valorisation

Valorisation of potato processing side streams

Side streams valorisation is a major strength: approximately 86% of EUPPA members are reporting full or near-full valorisation of their total side streams. Side streams are directed towards a mix of material uses, including food, feed, bio-based materials and reuse of tare soil, as well as energy uses such as biogas and energy recovery. This reflects a highly circular production model, where potato processing side streams are retained as valuable resources rather than becoming waste.

How EUPPA members valorise side streams

Number of members by share of side streams directed to each route.

0-24%	25-49%	50-74%	≥75%
Material	**Material**	**Material**	**Material**
3 EUPPA members	1 EUPPA member	6 EUPPA members	3 EUPPA members
Energy	**Energy**	**Energy**	**Energy**
4 EUPPA members	5 EUPPA members	1 EUPPA member	3 EUPPA members

~86%

On-site wastewater treatment

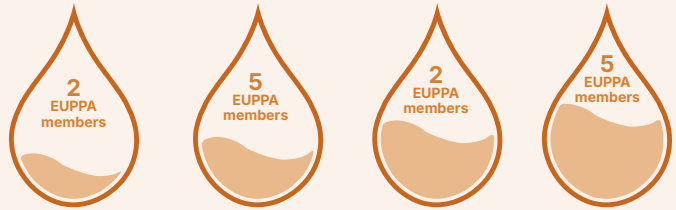
Wastewater treatment is virtually universal across EUPPA potato processing facilities, with around 86% equipped with on-site installations to clean process water before discharge, further treatment or reuse where permitted. Many members also reuse or recycle process water on site: five companies report routine reuse at 75% or more of their facilities, and another five at 25-49%. This shows that circular water management is already embedded in many operations and continues to scale across the sector.

10/14 MEMBERS

Heat recovery & reuse

Residual heat recovery has become a well-established part of potato processing operations across EUPPA members. Companies capture and reuse residual heat from activities such as steam peeling, frying lines, boilers and refrigeration, extending the value of energy already used in production. For most companies, this practice is applied widely across their operations. 10 out of 14 EUPPA members report residual heat recovery at nearly all or all processing sites, while the remaining members report implementation at most sites. This highlights strong progress in improving energy efficiency and reducing avoidable energy losses within processing operations.

On-site process water reuse across processing facilities



Pilot projects only (limited facilities)

25–49% of plants

50–74% of plants

≥75% of plants



OUR SOLUTIONS

Beyond the factory gate, potato processing shows how food production can support the EU's circular economy, food waste prevention and resource-efficiency objectives. Near-total valorisation of potato side streams keeps valuable resources in productive use and supports the EU waste hierarchy by prioritising prevention, reuse and recovery over disposal.
This circular approach is reinforced by widespread access to wastewater treatment and well-established heat recovery practices. Together, these help reduce environmental pressure, improve water stewardship, lower energy demand and contribute to EU priorities on food waste reduction, pollution prevention and industrial decarbonisation.

OUR CHALLENGES

Resource valorisation requires balancing two important objectives: stimulating the circular economy by keeping food and valuable materials at their highest possible use, while increasing the production of renewable energy when material valorisation is not an option. Potato processing side streams may have potential applications in food, animal feed, bio-based materials or energy generation, but their suitability and value can vary according to quality, safety, available technology and local market conditions.

THE FULL SYSTEM

RESPONSIBILITY, TRANSPARENCY AND THE ROAD AHEAD

The potato processing sector looks holistically at the full system behind the (potato-based) foods people enjoy. Alongside progress in the field, in the factory and through circular resource use, EUPPA members are also strengthening the governance needed to make sustainability credible: responsible business conduct, human rights policies, due diligence processes and supplier standards.

A sustainable potato journey needs to balance people, planet and profit. Progress should incorporate responsibility, transparency and continuous improvement across the whole value chain.

Responsible business

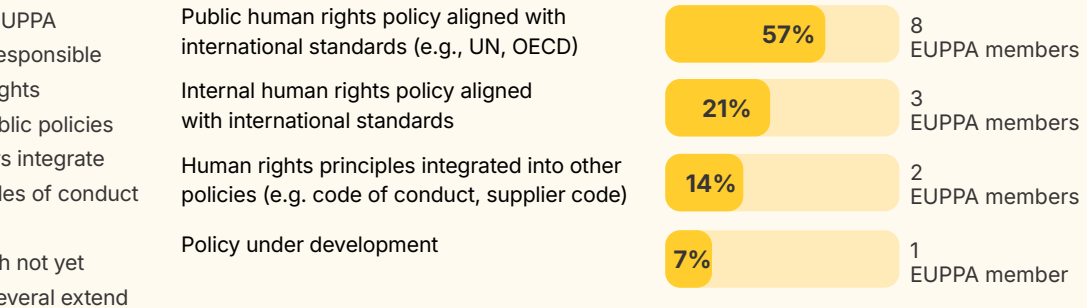
When it comes to human rights and working conditions, EUPPA members are committed to upholding high standards of responsible business conduct. Most companies have formal human rights policies aligned with international standards, including public policies referencing frameworks such as the UN and OECD. Others integrate human rights principles into broader policies, such as codes of conduct or supplier codes.

Human rights due diligence is widely implemented, though not yet universal. Many companies cover their own operations, several extend due diligence to key suppliers, and a small number are still developing formal processes.

Together, these practices support responsible supply chains, product marketing, fair trade, anti-corruption and conflict-of-interest management.

For EUPPA members, responsible business also encompasses the people behind the sector. Providing safe and healthy workplaces, fostering diverse, equitable and inclusive working environments, and supporting employee engagement and development are important elements of responsible business conduct."

Company approach to human rights







ROAD AHEAD

EUPPA members are actively shaping the sustainability transition in European potato processing, with strong foundations already in place, visible progress and a clear pathway for further improvement. The sector is moving beyond individual actions towards a more integrated approach to how potatoes are grown, processed and managed across the value chain.

Further progress will require time, expertise, investment and practical capacity from companies and their partners. Ambition must be matched by a favourable regulatory landscape and the resources needed to implement new practices, support growers and upgrade infrastructure across supply chains.

EUPPA's Sustainability Committee provides a long-standing platform for collective action. Since 2013, it has helped members exchange expertise, share best practices and develop common approaches through regular cooperation, dedicated conferences and sector-wide initiatives.

The road ahead is one of continuous improvement: strengthening climate resilience in the field, supporting growers, investing in efficient and low-carbon processing technologies, addressing energy and grid constraints, improving water stewardship and packaging circularity, and deepening responsible business across complex supply chains.

For the sector, the challenge is to keep raising ambition while ensuring sustainability remains practical, economically viable and compatible with food security, competitiveness and long-term resilience.

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The potato's sustainability journey

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