

# **Potatoes New Zealand Inc: Implications of the Potatoes Industry Strategy 2013**

September 2013

## **Executive Summary**

This document outlines the Potato Industry strategic framework and targets. Its purpose is form a clear linkage between the strategy and the business plan for Potatoes New Zealand, and thereby to bring these elements of the strategy to life.

Twelve of the initiatives outlined in the Potato Industry Strategy are identified as being the specific responsibility of Potatoes New Zealand. These are allocated to each of four areas: Research, Seed Certification Authority, Export Market Development, and Market Promotion. The numbering of initiatives from the Potato Industry Strategy is preserved for consistency.

Industry partners are also identified, alongside the purpose and status of each initiative. The document then also recommends actions for Potatoes New Zealand to either undertake directly, or to support other industry stakeholders in undertaking.

These actions can be translated into the formal business plan for Potatoes New Zealand.

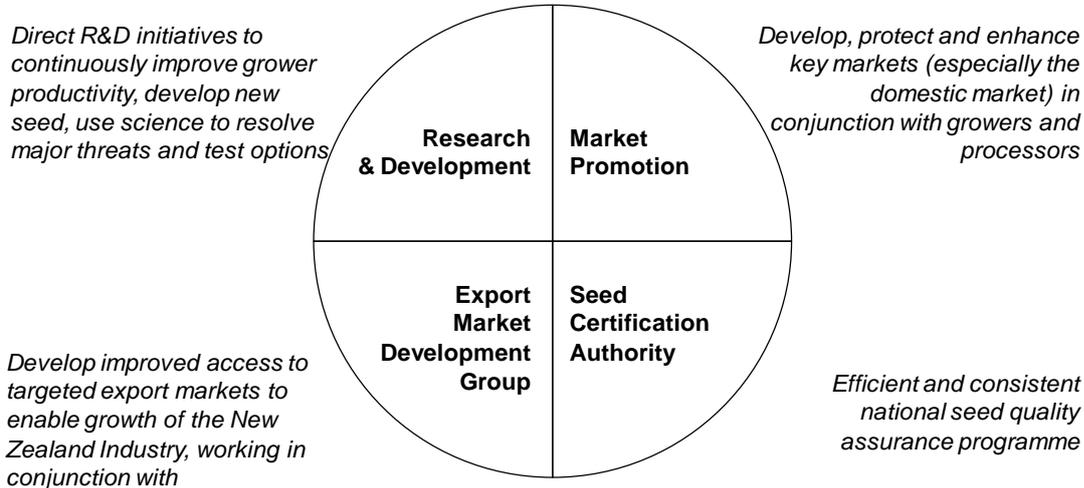
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# 1.0 Background

## 1.1 Potatoes New Zealand Structure and Roles

The Potato Industry Strategy outlined four key roles for Potatoes New Zealand in regards to achieving industry objectives. These are shown below:



Other roles include Leadership and Training, coordination with Horticulture New Zealand on issues including advocacy for the sector, and of course administration.

## 1.2 Potato Industry Strategy

The Industry Strategy comprises eight themes. The central theme involves improving grower productivity as a necessary basis for commercial success and competitiveness. Themes 2 and 3 involve aligning growers' activity with the fresh and process markets respectively. Themes 4, 5, 6 and 7 are concerned with developing those markets. Theme 8 involves better managing waste streams.



The industry targets are as follows:

1. Increase profit from productivity by \$150 per ha per annum
  - Continuous productivity improvement underpins the competitiveness of the industry, both domestically (for resources) and internationally (versus other exporters)
  - Equates to a 12% yield increase and \$1500 per ha over ten years
2. Double the value of fresh & processed New Zealand based exports by 2025.
  - Aligned with objectives of the government's business growth agenda
  - Implies volume and value growth
3. Enhance the value of the domestic market by 50% by 2025
  - Implies value growth on stable volumes, above CPI

### 1.3 Potato Industry Strategy Responsibilities

The industry strategy outlines specific initiatives for each theme. Potatoes New Zealand has a clear role in many of these proposed initiatives in the industry strategy. The thirteen initiatives tagged in the strategy as having the direct involvement of Potatoes New Zealand are listed below, according to the function area where they best fit.

Initiative	Description	Status	Accountability
<b>RESEARCH</b>			
1.2	Industry Plant Breeding	Current	PFR/PNZ
1.5	Disease & Pest Management Coordination	Current	PNZ / MAF / PFR
2.3	Innovative Product/Components	Proposed	Processors/PNZ/Institutes
8.2	Novel Waste Product Development	Proposed	PNZ / Research
<b>SEED CERTIFICATION AUTHORITY</b>			
1.4	Review of Seed Certification	Proposed	PNZ
<b>EXPORT MARKET DEVELOPMENT</b>			
4.1	Australian Market Access - Fresh	Current	EMDG / MPI
4.2	Targeted Asian Market Development (Fresh)	Proposed	EMDG / Growers
5.1	Targeted Asian Market Access (Process)	Proposed	EMDG / Processors
<b>MARKET PROMOTION</b>			
5.1	NZ Table Potato Quality Initiative	Proposed	PNZ/Growers/Retailers
6.1	The Chip Group	Current	PNZ/Processors
7.1	Media – Coordination of Key Messages	Current	PNZ
7.2	Complimentary Foods Marketing Initiative	Proposed	PNZ + Other Sectors

### 1.4 Other Responsibilities for Potatoes New Zealand

Potatoes New Zealand carries additional responsibilities for which a number of initiatives are proposed. These are outlined here for completeness. Note that activities such as administration are not included, but will comprise part of the function of Potatoes New Zealand.

Initiative	Description	Status	Accountability
<b>Other</b>			
A.1	Leadership and Training	Current	PNZ / PITO
A.2	Potato Levy Collection	Current	PNZ

## 2.0 Research & Development

Potatoes New Zealand has a key role in allocating industry levy funding to research and development activities. Industry research is funded by a compulsory levy on growers of 0.2%. This raises around \$290,000 per annum. These grower levies are responsible for leveraging a significant government investment (around \$700,000 a year) that is directed into research to benefit the New Zealand potato industry.

Potatoes New Zealand directs research and development through the Potato Research & Development Investment (RDI) Group. This group is responsible for funding research and development for the good of the industry. Often it relates to pest control - including psyllid. But the group also funds research to improve specific aspects of potatoes, such as boosting nutritional content. It has also invested in bringing overseas experts to New Zealand for grower seminars and farm visits.

Following the psyllid outbreak in 2006, a Psyllid Working Group was formed in 2009, and this operated as a subcommittee of the Research and Development Investment Group. This group is responsible for coordinating the potato industry's response to the psyllid pest. This group was disestablished in 2011, and its functions subsumed back into the RDI group.

Potatoes New Zealand also has a direct interest in the Vegetable Research and Innovation (VR&I) Board, which is coordinated through Horticulture New Zealand. The Board was established early in 2006 and the other contributing groups are Vegetables New Zealand, Tomatoes NZ, Process Vegetables NZ, Onions New Zealand Inc. and New Zealand Asparagus Council. The VR&I Board is currently chaired by Dr Mike Dunbier (previously Chief Executive of Plant & Food Research). In 2010, Dr Lindsay Fung of Horticulture New Zealand took over the position of VR&I Manager.

### 2.1 Industry Plant Breeding (1.2)

Status: Current

Partners: Plant and Food Research

Key Objective: Better alignment of interests through an industry-good owned breeding evaluation in conjunction with Plant and Food Research, i.e.:

- Paid yield (aligned with purpose, e.g. solids for process applications)
- Resistance to pests & diseases
- Flavour profile
- Fit for purpose

Actions for Potatoes New Zealand:

1. Initiate an independent review of new cultivar performance with special reference to how new cultivars (especially the PFR cultivars) improve the economic outcomes for growers (i.e. alignment to markets). The process will involve consultation with growers on the performance of cultivars, and actual outcomes in terms of returns per hectare planted. This will be confirmed with analysis and cross-referencing versus the breeders data and marketing material. The deliverables will include a quantified assessment of cultivars and recommendations for the key traits in specific segments or applications that determine the economic outcome. It is important that the work should have the cooperation of key industry plant breeders (e.g. PFR) and seed companies.
2. Create a formal industry plant evaluation framework specific to the intended applications for potato cultivars. This should incorporate recommendations from the review.
3. Work with Plant & Food Research to ensure their objectives & processes are aligned to the framework, and practical for plant breeders to implement.

### 2.2 Disease & Pest Management Coordination (1.5)

Status: Current

Partners: MAF, Plant and Food Research

Key Objective: Growers have the tools necessary to deal with existing pests and diseases, and are protected from further incursions, i.e.:

- Published up-to-date protocols and methods for pest and disease control
- Ongoing investment in testing agri-chemicals and alternative management plans
- Growers interests are represented with respect to a potential Government-Industry Agreement (GIA) around bio security

Actions for Potatoes New Zealand:

1. Continue the work of the Psyllid working group, including the dissemination of advice and reminders to growers.
2. Coordinate the testing and approval of chemical tools for pest and disease management, including working with government agencies (e.g. MPI, MFAT) to ensure neither food safety nor trade access is compromised
3. Develop a strategy for bio security including an economic assessment of risks to both returns and also increased production costs, which can then inform further discussions around funding and the role of government.

### **2.3 Innovative Product/Components (2.3)**

Status: Proposed

Partners: Processors / Research Institutes

Key Objective: To create new products using potatoes and/or potato components that meet one or more of the following objectives:

- Increase share of plate for potatoes (i.e. increase consumption)
- Increase value (i.e. returns to growers)
- Reduce wastage (i.e. utilise potato waste)

Actions for Potatoes New Zealand:

1. Facilitate R&D cooperation between processors and research institutes to develop new/novel applications for potatoes or potato components. This could potentially include facilitating funding bids to MBIE or similar. A key element of this is likely to include leveraging the health benefits of components in potatoes such as gluten-free carbohydrates, potassium and thaicin. It might also include the proof of claimed benefits where these have not been validated.
2. Note that processors are expected to lead development of products to use 'waste' streams and improve overall utilisation of the whole potato, e.g. Mashed products, as a commercial investment rather than one for the industry group to invest in

## **2.4 Novel Waste Product Development (8.2)**

Status: Proposed

Partners: Food Research Institutes, Processors

Key Objective: To identify higher-value options to use potatoes, or potato waste, in novel applications

Actions for Potatoes New Zealand:

1. Develop R&D interest from research institutes in promising areas utilising potatoes and/or potato waste. Areas already published include:
  - a. Extraction of functional hydrocolloids i.e. rhamnogalacturonan-I extracted from potato pulp
  - b. Efficient lactic acid production from hydrolysed potato waste
  - c. Acetone, butanol and ethanol (ABE) from potato wastes
2. On the basis of specific areas identified with partners, Potatoes NZ will facilitate and assist in establishing long-term research programs to pursue these opportunities

## 3.0 Seed Certification Authority

Certification of seed potatoes is provided by the New Zealand Seed Potato Certification Authority (NZSPCA), which runs the national quality assurance programme. The Authority contracts independent companies to visually inspect crops in the field as well as tubers after harvesting. Participation in the scheme is voluntary.

### 3.1 Review of Seed Certification (1.4)

Status: Proposed

Partners: NA

Key Objective: To improve the rules, systems and structures of seed certification to better meet the intent of quality assurance and increase participation in the scheme

#### Actions for Potatoes New Zealand:

1. Review the rules for quality assurance and certification (overseen by the NZSPCA technical committee)
2. Review the capacity of inspection providers to perform necessary tasks
  - a. Specifically the availability of qualified, competent inspectors at peak times
3. Review the alignment of the seed certification authority with the best interests of the industry overall
  - a. Structure
  - b. Costs
  - c. Outcomes

#### Background to the Issues:

The current issues with the seed certification are as follows:

1. The current rules by themselves are perceived as being inadequate for quality assurance
2. The capability of providers is questioned by some industry participants
3. The scheme is perceived by some as not being worth the cost (essentially a value issue)
4. Participation in the scheme is estimated at less than 80% (scheme is optional)

The rules for seed certification under the NZSPCA are contained in a document of just 14 pages plus annexures, and as this does not specify procedures it generally leaves room for interpretation by the party authorised to carry out inspections. The rules also include various exceptions and accommodations, which in some cases compromise the overall aim of quality assurance<sup>1</sup>. Accordingly, some industry participants believe the current rules do not reinforce an industry commitment to quality assurance. An alternative quality assurance scheme is known to comprise more than 100 pages including specific standards, procedures, testing protocols and responsibilities. Particularly in the case of developing an export market for certified seed, a more comprehensive and consistent set of rules would be appropriate.

There are two inspection companies (Asure Quality and SGS). While the rules require these companies to document how staff competencies are met, industry participants express doubts about both the capacity and competency of inspection staff. There is also potential for different interpretations of the rules and standards, particularly as to what comprises an 'inspection'. Generally, this does not provide confidence of quality assurance throughout the growing period.

The scheme is estimated to cost approximately \$20 per MT across the volumes within the scheme. This is generally considered a reasonable cost for quality assurance. However, it is not widely accepted as good

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<sup>1</sup> For example, relaxation of the rule prohibiting the use of non-certified seed on the same property as being used for growing certified seed.

value for the current scheme. There is a very real tension between the desire to keep costs low, but not compromise the goal of quality assurance.

Participation in the scheme is estimated at something less than 80% (i.e. 20% of seed in New Zealand is uncertified). Some processing companies work with growers producing uncertified seed, but under their own scheme to obtain the desired quality. This suggests that those companies see greater value for money in their own schemes, despite having less volume (and hence less critical mass) than the NZSPCA scheme.

## 4.0 Export Market Development

The strategy for New Zealand Potatoes identifies export markets as the critical pathway to growth. Consequently, improved access into export markets is a priority for the industry.

Potatoes New Zealand's Export Market Development Group is a subcommittee of Potatoes New Zealand and is made up of growers and exporters. It currently manages a programme of work to investigate and assist in the development of markets and to open up access to new markets for fresh New Zealand table, processing and seed potatoes. This work involves negotiating with New Zealand and foreign governments the access conditions that will permit New Zealand to export to these countries.

Key partners for Potatoes New Zealand include MPI, Market Access Solutions (consultants), MFAT and NZTE who each contribute in different capacities.

### 4.1 Australian Market Access – Fresh (4.1)

Status: Current

Partners: MPI, Market Access Solutions, MFAT, NZTE

Key Objective: To secure practical access for New Zealand fresh potatoes into Australia

Actions for Potatoes New Zealand:

1. Maintain a watching brief on Bio-security Australia's position
2. Re-start the process for the pending market access request when possible, including the supply of fresh potatoes into the Australian processing sector

Background:

Australia represents a large market in close proximity to New Zealand. Australia currently produces 475,000 MT of fresh table potatoes, and consumes approximately 440,000 MT domestically. 35,000 MT of fresh potatoes are exported, mainly to SE Asia.

Australia currently prohibits all fresh potato imports, including those from New Zealand. Australia does permit processed potato imports, and these account for 85,000MT of the 465,000 MT domestic process product market. New Zealand has a significant share of this process export market.

The New Zealand industry has been seeking access for fresh potatoes for processing into crisps and fries since 2004. Australia began work on this request in 2010. The access request has generated significant industry and political opposition in Australia which has delayed approval of the request. The request has also been caught up in the senate inquiry on Biosecurity Australia's import risk assessment process which has delayed access approval further with no indication of when access will be approved.

### 4.2 Targeted Asian Market Development – Fresh (4.2)

Status: Proposed

Partners: MPI, Market Access Solutions, MFAT, NZTE, Fresh Growers

Key Objective: To secure practical access for New Zealand fresh potatoes into Asian markets

Actions for Potatoes New Zealand:

1. Prioritise one to three Asian markets for development.
  - a. Key dimensions are ease of market access (e.g. low tariffs and phytosanitary requirements that are practical for NZ exporters), and market potential (e.g. demand for imported potatoes, potential for differentiation and premium value).

- b. All Asian markets must be included in the evaluation
  - c. Note that SE Asian markets are currently deemed most likely to be attractive for fresh exports as they generally have few phytosanitary demands because they are not major producers of potatoes, and high demand because potatoes are often a staple part of the diet. Affluent countries such as Singapore are particularly attractive as they have the potential to afford premium products.
2. Develop a more in-depth assessment of the highest priority markets<sup>2</sup>
    - a. Validate market opportunity, including details on specific fresh potato market preferences and potential competitors in the export space
    - b. Seek input from trade officials on potential changes to market access, and opportunities to accelerate improvements
  3. Develop a plan for industry coordination to develop specific market
    - a. Secure a commitment from growers to support market development with volumes, and potentially joint-funding of in-market resource (market approach to be agreed at outset)
    - b. Engage MPI and other trade officials in strategy to improve market access on the basis of volume commitments
    - c. Support/encourage industry participants to visit the target market, with the aim of validating opportunities, gaining a better understanding on in-market distribution for potatoes, and potentially negotiating to supply the market. Ideally the target is for larger deals contracted on behalf of groups of NZ growers (and backed with the commitment to supply by these same growers)

### 4.3 Targeted Asian Market Access – Process (5.1)

Status: Proposed

Partners: MPI, Market Access Solutions, MFAT, NZTE, Processors

Key Objective: To secure improved access for New Zealand processed potatoes into Asian markets

Actions for Potatoes New Zealand:

1. Partner with processors to create the project, and leverage existing market knowledge. Specifically, a better understanding of the profiles for imported process products in each Asian market, what New Zealand-sourced products there are, and current plans for export to those markets.
2. Prioritise the markets for increased export development. Based on current exports, these would likely include:
  - a. SE Asia: Malaysia, Thailand, Singapore, Indonesia, Philippines
  - b. North Asia: Japan, Taiwan
3. Develop a more in-depth assessment of the highest priority process markets
  - a. Validate market opportunity, including details on specific processed potato products and potential competitors in the export space
  - b. Support/encourage industry participants to visit the target market to verify findings or challenge current perceptions
  - c. Seek input from trade officials on potential changes to market access, and opportunities to accelerate improvements
4. Develop a plan for industry coordination to develop specific market
  - a. Secure a commitment from one or more NZ-based processors to support market development with export volumes, and product development as required
  - b. Engage MPI and other trade officials in strategy to improve market access on the basis of these processor commitments
  - c. Support/encourage industry participants to visit the target market, with the aim of gaining a better understanding of the in-market distribution channels for processed potato products, and potentially negotiating with distribution partners to supply the market.

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<sup>2</sup> Note that market assessments have previously been written for Singapore and Malaysia (2010). These were written by Market Access SolutionNZ for NZ Trade and Enterprise.

## 5.0 Market Promotion

Potatoes New Zealand aims to increase potato consumption by empowering consumers, key influencers, growers and industry partners. In terms of market promotion, this means building a positive image for potatoes.

### 5.1 NZ Table Potato Quality Initiative (5.1)

Status: Current

Partners: Growers & Retailers

Key Objective: Quality assurance of fresh fit-for-use table potatoes to point of sale

Actions for Potatoes New Zealand:

1. Work with growers and retailers to develop clear categories and quality standards for table potatoes
  - Define use categories
  - Define fit-for-use attributes
  - Develop standards for quality according to attributes and intended use
2. Implement industry-wide quality assurance program for fresh categories
  - Develop program for improvement of quality according to standards
  - Standardise low-cost grower tests for attributes (e.g. cook tests)
  - Possibly introduce quality audits
3. Create an aligned Marketing Strategy for quality fresh potatoes
  - Review current industry marketing
  - Re-align to consumer use and categories
  - Consider introduction of a quality mark for approved suppliers (linked to audit process)

Background:

There are existing categories for fresh potatoes: “boiling and salad”, “baking, roasting and mashing” and “in between”. These categories are colour-coded in retail formats. It is felt that the utility of these categories is limited with such loose definitions. There is also a need to challenge category descriptors such as “salad”. Some growers have already moved to sophisticated branding and packaging approaches that allow them to put different varieties in the same packaging depending on availability and the specific intended use.

In terms of quality assurance around ‘fit for purpose’, cook-tests are used in some circumstances but generally the decision on ‘what to put in the bag’ is left to the grower. This leads to variable performance, and potentially poor consumer experiences. Clear expectations and some standardisation around the attributes of the potato is required.

Overall, the promotion of fresh potatoes to consumers needs to be built on a robust industry marketing approach that provides clarity of choice, and quality assurance around the product being fit for purpose. At present, the system does not meet this aspiration.

## 5.2 The Chip Group (6.1)

Status: Current

Partners: Processors

Key Objective: To improve the nutritional status of deep-fried chips served by New Zealand foodservice by reducing fat (total and saturated) and salt content

### Actions for Potatoes New Zealand:

1. Develop and maintain industry standards for operators
2. Advocacy and communication
3. Best Chip Shop Competition (this has been running for 15 years)
4. Free online training
5. Free training workshops
6. Networking
7. Profile within health industry

### Background:

The Chip Group is an industry and public health collaboration, of which Potatoes NZ is a key member and driving force. With the underlying goal to improve the nutritional quality of deep fried chips sold in NZ, the group works hard to train operators about techniques to produce lower fat and better tasting chips.

Research has been undertaken to develop potato varieties, cooking medium and frying techniques that absorb less fat. The crucial factor of the industry is education of the operator. Operators adhering to Industry Standards will produce deep-fried chips with significantly less fat (i.e. 7-9%). One of the initiatives underway is Town Makeovers, where operators from a town are invited to attend a Training Seminar covering everything there is to know about frying chips. The Matamata Town Makeover, for example, enabled the ten operators who attended to remove 1711kg of fat per annum from the Matamata food supply.

## 5.3 Media – Coordination of Key Messages (7.1)

Status: Current

Partners: NA

Key Objective: To refine “good” industry messages for fresh potatoes, and prepare media strategies for defending against attacks on the reputation of potatoes

### Actions for Potatoes New Zealand:

1. Conduct market research
  - a. Potatoes New Zealand is currently undertaking a Consumer Research initiative with AC Nielsen. This is aimed at increasing potato sales and consumption through better knowledge of the category and potato consumer behaviour. Its objectives are establishing the actual size of the market, what New Zealanders are consuming, and understanding consumer purchasing behaviour and attitudes towards potatoes.
2. Validate legitimate health claims for potatoes
  - a. Potatoes New Zealand has commissioned Plant & Food research to update information on the composition and health benefits of potatoes. This makes the important distinction between ‘General level health claims’ which refer to a nutrient or substance in a food and its effect on a health function, and ‘High level health claims’ which refer to a nutrient or substance in a food and its relationship to a serious disease or to a biomarker of a serious disease. The first phase is essentially a literature review, and the second phase will measure the actual composition of New Zealand potatoes. The third phase then looks at distilling the most relevant information for use by the industry (e.g. on the website)

- b. It is also sensible for Potatoes New Zealand to leverage the work done by other Potato industry organisations from other nations
3. Develop a new communication plan comprising key messages and a channel strategy
    - a. Key messages for Potatoes to increase consumption: based on the consumer purchasing behaviour and attitudes, and the legitimate health claims for potatoes, key messages will be developed to resonate with consumers and encourage/increase potato consumption. Based on overseas experience, defence strategies against attacks on the reputation of potatoes will also be crafted as contingencies.
    - b. Create an effective channel strategy to reach consumers and key influencers: Potatoes New Zealand will review and revise the current channel strategy which extends from the website presence ([www.potatoes.co.nz](http://www.potatoes.co.nz)) to school programs to support for chefs and food writers, and social media.

#### Background:

The New Zealand Potato industry has been well-served by ongoing investment in an education and marketing program. This work also leverages the knowledge and experience of other national organisations including Australia, UK and South Africa through long-standing relationships.

It is appropriate to review the effectiveness of this investment, and potentially to refresh the approach with new information now available, to make sure the industry is getting the best return from its investment.

### **5.4 Complimentary Foods Marketing Initiative (7.2)**

Status: Proposed

Partners: Other Sectors including Beef+Lamb New Zealand, Seafood New Zealand and Vegetables New Zealand

Key Objective: To create a joint-marketing campaign for potatoes with other sectors

#### Actions for Potatoes New Zealand:

1. Continue existing participation in joint-marketing initiatives with Vegetables New Zealand, including:
  - a. The Nestlé Toque d'Or (Golden Hat) student chef competition
  - b. Promotion of "5 a day" concept in the Veg Up campaign
2. Approach other sector organisations, particularly Beef+Lamb New Zealand and Seafood New Zealand with a view to establishing joint marketing initiatives or preferential placement agreements including potatoes as the key staple accompanying their product.
3. Work with major Retail partners to explore opportunities for joint promotion of potatoes (fresh and processed) with other foods

#### Background:

Joint-marketing initiatives have generally been the province of Vegetables New Zealand, who already have specific chef competitions organised with Deer NZ, for example, seeking the best recipes using farmed venison and vegetables. However, there is a much greater imperative for potatoes to be active in this space:

1. Potatoes have more to lose: potatoes are a staple food, but are challenged by other sources of carbohydrates including rice, pasta and even cereals (as well as other vegetables) for share of plate.
2. There is a likely nutritional/metabolic benefit to combining potatoes with protein-rich foods. The relatively high GI of potatoes on their own is transformed to a much lower effect when combined with proteins, and this is significant for health claims. i.e. potatoes are best combined with other foods.

Potatoes New Zealand is not suggesting that chef competitions are the answer. The approach could be more subtle, such as preferential placement of potatoes in promotion of other products, and vice versa.