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ANALYSIS

Impact of the 2026 summer drought and heatwaves on the European potato harvest

Summary

The European drought and heatwaves in summer 2026 have had a significant impact on agriculture. This analysis looks specifically at the potential impact on the 2026 potato harvest in Germany, France, Belgium and the Netherlands, collectively known as the North-Western European Potato Growers (NEPG). We also include an estimate for Great Britain.

The impact of the exceptionally hot and dry weather in summer 2026 is expected to knock 3.1 million tonnes off the NEPG potato harvest, with yield reductions against the five-year average of between 7% and 21% across these four countries. At prices agreed before the drought, this lost production is valued at between €405m and €622m, with a central estimate of €498m.

When the expected impact of the drought and heatwaves on the potato harvest in Great Britain are added, this increases to over 3.5 million tonnes, increasing the value of the total lost production to between €498m and €818m across Great Britain and the NEPG countries. For the Great Britain alone, these losses are estimate at between £80m and £169m.

2025 produced a record 27.3 million-tonne harvest, which collapsed prices due to oversupply. Growers responded the way a market should and planted less - 11% less in Germany, 10% in France, 15% in the Netherlands and 17% in Belgium. That took a further 3.6 million tonnes out of the crop based on yields at the five-year average. Losses reported above associated with the drought and summer heat therefore come on top of this market related contraction in supply.

The trade now expects 19.5 to 20.5 million tonnes, and World Potato Markets says the EU-wide crop could be the smallest on record.

Germany carries the largest loss at 1.13 million tonnes, followed by France (0.99 million, with the lowest yields in more than thirty years), Belgium (0.79 million, half of the main frying variety below the size processors want) and the Netherlands (0.21 million). Great

Britain, counted separately, loses a further 0.44 million tonnes and is heading for its smallest potato harvest on record.

Method

For each country the loss is the five-year average yield (2021 to 2025) minus the 2026 yield estimate, multiplied by the area planted in 2026, which isolates what the weather did to the crop in the ground.

The reduction in planted area (a further 3.6 million tonnes not grown) is reported separately and excluded, because it was a market decision taken before the season. Each country uses one consistent basis for its own yield and area: ware potatoes only (grown for human consumption) for France and the Netherlands, all potatoes including seed and starch for Belgium and Germany (the basis on which their sources report), so the four-country total is not directly comparable with the North European Potato Growers (NEPG) ware series. The five-year baseline already contains the 2022 drought and the 2023 washout, so it understates rather than overstates the loss.

Great Britain uses the same formula on World Potato Markets' (WPM) GB series, which continues the former Potato Council and Agriculture and Horticulture Development Board (AHDB) estimates of total production, ware and seed together. This makes the GB figure comparable to the all-potato basis of Belgium and Germany. The 2026 yield is WPM's 2018-analogue scenario rather than a test-dig estimate, so the GB estimate is reported at a lower confidence level and reported separately from the European total. All estimates are gross harvested production before grading, so the tonnes lost include the share that would normally go to seed, stockfeed and waste (in Britain about 10% and 8 to 13% respectively, based Defra figures).

Yield estimates are based on the following sources of information:

- France: average yield estimate, 37.4 tonnes per hectare. Based on national test digs by Union Nationale des Producteurs de Pommes de Terre (UNPT), the French fresh-potato interprofessional body, CNIPT and French crop research institute, Arvalis, 24 August (37.4 t/ha against a 43.1 t/ha average); Agreste's official estimate from 1 August, just under 40 t/ha, is an older reading and is used as a cross-check. As reported by Potato News Today.

- Belgium: average yield estimate, 33 tonnes per hectare. Based on Fontane test digs across 33 fields by Viaverda, Fiwap, Carah and Inagro, week 35, converted to a final yield using the 2018 and 2022 seasons as analogues (33.0 t/ha used, range 30.3 to 33.6). As reported by World Potato Markets 783.

- Netherlands: average yield estimate, 42 tonnes per hectare. Based on week-36 test digs of Fontane, the main processing variety, 6.7% below the long-term average at the same stage, applied to an assumed ware average of 45 t/ha pending CBS and NEPG figures. As reported by World Potato Markets 783.

- Germany: average yield estimate, 39.5 tonnes per hectare. Based on Agrarmarkt Informations-Gesellschaft (AMI – a German agricultural market information provider) first crop estimate of 10.6 million tonnes against 13.9 million in 2025 (27 August), on the 268,300 hectares in the federal ministry's harvest report of 2 September.

- Great Britain: average yield estimate, 41.6 tonnes per hectare. Based on a season analogous to 2018. Data availability is more limited following the end of harvest and yield estimate reporting from the Agriculture and Horticulture Development Board in 2021. World Potato Markets estimates 101,000 hectares planted (down 5.7%) and yields at 2018 levels of 41.6 tonnes a hectare, giving 4.2 million tonnes, below the previous record low of 4.5 million in 1975 and 15% below last year.

Data from World Potato Market's subscription report, including tables, digs and UK estimate are cited with the editor's permission.

To estimate the **value of production**, tonnes lost to drought and heat are valued at contract prices fixed before the drought, not at this autumn's free-market prices, so the shortage cannot inflate the value placed on it. Most of the crop is sold on those contracts (70 to 80% of processing potatoes), and growers who cannot deliver must buy in at higher spot prices, so the contract price is a floor on the loss rather than the maximum.

We estimate three potential estimates based on prices of €130 a tonne (2026/27 contract prices after the 20% cut agreed during last winter's glut), €160 (the contract level before that cut, a normal-year price) and €200 (the level implied by UNPT's own €400 million estimate of French growers' losses). New-crop free-market quotes are already €200 to 250 a tonne. Great Britain, which has no published contract series, is valued at Potato Call's ex-farm free-buy quotes of 3 September, by use: £180 a tonne for crisping potatoes, £300 for French-fry processing and peeling, and £380 for packing whites and frying varieties. These are current rather than pre-drought prices, which is one reason the GB figure is reported separately to the European total.

Results

Results are set out in Table 1 below.

Analysis of grower test digs, national statistics and trade estimates across northern Europe's four main potato producers finds that this summer's heat and drought have taken about 3.1 million tonnes of potatoes off the crop that was in the ground. Yields are 13% below the five-year average in France, the lowest for more than thirty years bar 2022. They are 21% below in Belgium, where half of the main frying variety was below the

50mm size processors want at the end of August, 10% below in Germany and 7% below in the Netherlands. Valued at the prices growers agreed before the drought, the lost crop is worth between €405 million and €622 million.

Table 1 – Summary of results

Country	2026 yield vs five-year average	Potatoes lost to heat and drought	Value at grower prices (central)	Range (low to high)	Notes and sources
Germany	-10%	1.13 million tonnes	€180m	€146m to €225m	AMI first crop estimate (27 Aug) on the ministry's 2 Sept area
France	-13%	0.99 million tonnes	€158m	€128m to €198m	Growers' national test digs (UNPT/CNIPT/Arvalis), 24 Aug
Belgium	-21%	0.79 million tonnes	€126m	€102m to €157m	Growers' Fontane test digs, week 35 (Viaverda/Fiwap), pre-harvest
Netherlands	-7%	0.21 million tonnes	€34m	€27m to €42m	Test digs, week 36 (via World Potato Markets)
Europe, four countries	-	3.11 million tonnes	€498m	€405m to €622m	Area cut adds a further 3.6 million t not grown; excluded from totals here
Great Britain	-11%	0.44 million tonnes	£133m	£80m to £169m	World Potato Markets scenario, 8 Sept; no official survey since 2021. Note: figures in sterling
All countries	-	3.56 million tonnes	€653m	€498m to €818m	Currency figures reported in Euros. Exchange rate of 1.16 € to £

The losses came after a deliberate reduction in planting in response to a previous glut. 2025 produced a record 27.3 million-tonne harvest, which collapsed prices due to oversupply. By April the Belgian trade quotation for spot potatoes had fallen to €0 a tonne, growers were leaving surplus in fields, and contract prices for 2026 were cut by 20%. Growers responded the way a market should and planted less: 11% less in Germany, 10% in France, 15% in the Netherlands and 17% in Belgium. That took a further 3.6 million tonnes out of the crop. An additional 6% less was drilled in Great Britain.

However, the market hadn't prepared for the summer's record heat and drought. Potatoes are planted once a year. When five heatwaves hit France, England had its driest July since 1836, and the UK recorded 40 days above 30°C, there was no way to plant more. A record four-country NEPG harvest in 2025 has been followed by what the trade expects to be a crop below the 2022 drought year, the smallest in recent years at about 21.6 million tonnes. On World Potato Markets' wider measure, which includes seed and starch potatoes, the EU crop could be the smallest on record.

The shortage is already moving prices in every channel, and the contract system most of the industry runs on is under strain. In the processing market, Belgian free-market potatoes have gone from zero in April to €200 or more, German processing potatoes are making €240 a tonne against a season low of €15 in June, and British processors are paying over £300 a tonne to secure supply against £180 in February. In the fresh market, French table potatoes opened the season at €520 a tonne against €310 a year ago, and Germany at €270 to €280 against €150. UNPT, the French growers' union, has warned that growers may not be able to deliver the tonnages they contracted. In 2018 the same sequence lifted crisp and chip prices for consumers three to nine months after the harvest, raising the prospect of higher prices for consumers in 2027 just as inflation returns more broadly due to the Iran war and wider climate impacts.

The cost of climate change

The projected losses for the potato harvest in north western Europe follow the hottest summer on record for western Europe, with a combination of extreme heat and dry weather that has hit agriculture more broadly. Severe drought conditions were reported in France, the UK, Hungary and parts of the Balkans. In addition to these losses for the potato crop, the June heatwave alone is projected to have reduced the European cereals and grain harvest by 9 million tonnes, costing farmers around €2 billion in lost revenue.

World Weather Attribution (WWA) found that the June heatwave in Europe would have been virtually impossible 50 years ago, and that the nighttime temperatures experienced in 2026 were 100 times less likely in only 2003. A further WWA study found that the increase in potential evapotranspiration caused by higher summer temperatures and more severe heatwaves has significantly increased in the risk of drought in Europe.