



SUMMARY

- U.S. certified seed exports to Central America have increased 61% for the most recent nine-months compared to the prior year.
- The long-term variety trials in Cuba continue, which will hopefully lead to increased sales in the coming months and years
- Uruguay began importing U.S. certified seed due to timely variety trials and increased demand.

STRATEGIC THINKING

Team Seed remains focused on priming the pump for future “stable” international seed sales opportunities. The following chart provides a glance at our thinking.

1. Run trials to show the performance of U.S.-grown seed.
2. Look for a genetic strength that makes a difference in that market.
3. Make sure there is adequate seed acreage in the U.S.
4. Find an advantage over supply from other countries, or better yet, find a way to work together that benefits both parties.
5. Focus on logistical advantages and aligning with the importer’s planting window.
6. And lastly, register the same variety in multiple markets, providing leverage for the U.S. supplier.



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Program Objectives

- Expand U.S. Seed Potato Exports – Run trials, ensure supply, and capitalize on market advantages.
- Develop Cuban Market – Continue trials, meet regulations, and establish U.S. seed presence.
- Grow in Central & South America – Capitalize on post-pandemic demand and introduce new varieties.
- Explore African Markets – Assess opportunities, leverage logistics, and expand exports.
- Strengthen Industry Collaboration – Host trade missions, engage buyers, and hold strategic meetings.

CUBA UPDATE

Cuba has the potential to become the largest export market for U.S. seed potatoes in the Americas outside of Canada. Cuba has average seed imports of 15,079 MT (331,738 cwt) over the last five years. However, Cuba does have a high bar for entering the market. Variety registration looks to be at least four years, and possibly longer.

Three varieties sent to Cuba for trials arrived in November 2024 and were planted by January 9, 2025, 45 days after arriving. While this may seem like a long time to clear seed potatoes for planting, it is shorter than the average time from port to field in Cuba, which has been 55 days for the four previous trials the U.S. has successfully planted.

This is the fourth variety trial for Golden Globe, and the second for Eva, Soraya, and Alegria. Golden Globe should be registered in 2025, with first sales ideally occurring in the fall of 2025, although more details are needed from the Cuban Ministry of Agriculture. Eva, Soraya, and Alegria should be eligible for sales in 2027.

In the fall of 2025, Potatoes USA plans on shipping Lady Liberty, Gala, Blackberry, and AO8433 seed from September 1-15 to be planted by November and harvested in March 2026. All varieties in the Cuban trials have extreme resistance to PVY.



Potatoes USA delegation in Cuba.

CENTRAL AND SOUTH AMERICA

Seed exports increased 61% from July 2024 to March 2025. This is driven by the resurgence of seed potatoes for the fresh market following decreased demand due to the pandemic.

Panama, Nicaragua, and Uruguay all imported U.S. seed potatoes for the first time since the pandemic. Uruguay has been importing the variety Red Magic from France for several years. French production issues led to an opportunity for U.S. seed suppliers to fill in the gap. Now, Uruguay is importing U.S.-produced Red Magic. There continues to be strong demand in Uruguay for new red-skinned seed potatoes and the standard variety, Chieftain.

Panama imported the variety Soraya. This importation is the direct result of the 2023 Potatoes USA variety trials. We hope sales will increase for Soraya and possibly for Golden Globe. Potatoes USA will continue to promote other U.S. varieties in Panama with trials in 2025.

Nicaragua imported the variety Golden Globe, which was a direct result of the variety trials in 2023. The importer in Nicaragua will be increasing his order for Golden Globe and hopes to import other new varieties in the coming year. Potatoes USA will continue to promote other U.S. varieties in Nicaragua with trials in 2025.



FUTURE TRIAL PLANS

After successful market openings in Panama and Nicaragua, Potatoes USA will continue to open new markets for U.S. seed potato exporters. Potatoes USA is exploring the potential for trials in the Dominican Republic to expand beyond the chipping market (already receiving imports) to fresh market varieties. We also hope to continue variety trials in Honduras to register new varieties.

An importer in Honduras, with assistance from Potatoes USA, is attempting to register the variety Sound. Sound was trialed successfully in six sites in Honduras in 2024. If Sound is registered in Honduras, the importer will try to import U.S.-produced Sound later in 2025. Sound is an oblong pale-yellow variety with outstanding resistance to late blight. It has attracted the interest of Walmart and other retailers as a good fit for the Honduran market.



Panama buyers visit Pamlico Shores.

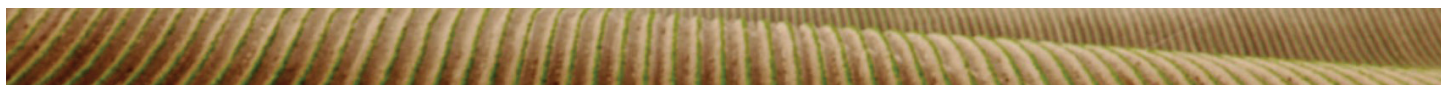
REVERSE TRADE MISSION

Potatoes USA hosted a Reverse Trade Mission from July 29 to August 2, 2024. The experience included seed potato buyers from Nicaragua, Honduras, Guatemala, and Panama. The attendees started at Potatoes USA headquarters, where they listened to talks about U.S. seed potato certification, potato breeding, and APHIS standards.

The delegates then broke into two groups. One group traveled to North Carolina to visit Pamlico Shores, see seed potatoes in storage, visit a soil testing lab, and speak with certification officials. The other group went to Washington state to visit seed potato fields from Ebe Farms and other institutions. All of the delegates were impressed with the high quality of U.S. seed potatoes being grown for their markets.



Greg Ebe and Austin Lenssen show their latest varieties to buyers from Guatemala, Honduras and Nicaragua.



EXPLORING OPPORTUNITIES IN AFRICA

A global assessment completed by S&P Global on behalf of Potatoes USA found African markets to be an opportunity for U.S. seed potatoes. West Africa appears to be the biggest opportunity, with Senegal alone importing 15,000 MT of seed potatoes from Europe. The main advantage of U.S. is the potential to send seed potatoes about four weeks earlier than European seed potatoes. The primary markets in West Africa are Senegal and Mali, with Mauritania, Ivory Coast, and Ghana as smaller but significant importers. Potatoes USA received Regional Agricultural Promotion Program grant funding to develop these markets for U.S. exports.



Interested in learning more or joining the U.S. Seed Task Force?

We hold two Seed Task Force meetings a year:

One at Expo in January and one in late July.

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