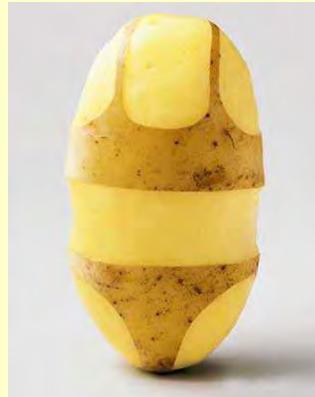
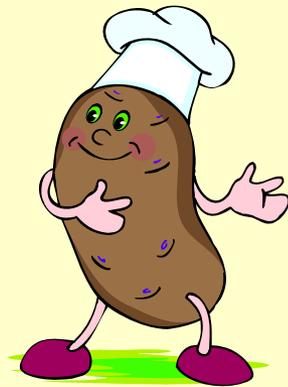




Greenvale AP

The natural choice for fresh potatoes...

Potato Variety Development in a Mature Retail Market



Making potatoes Sexy !



Greenvale AP

The natural choice for fresh potatoes...

Breeding



Breeders

PCN

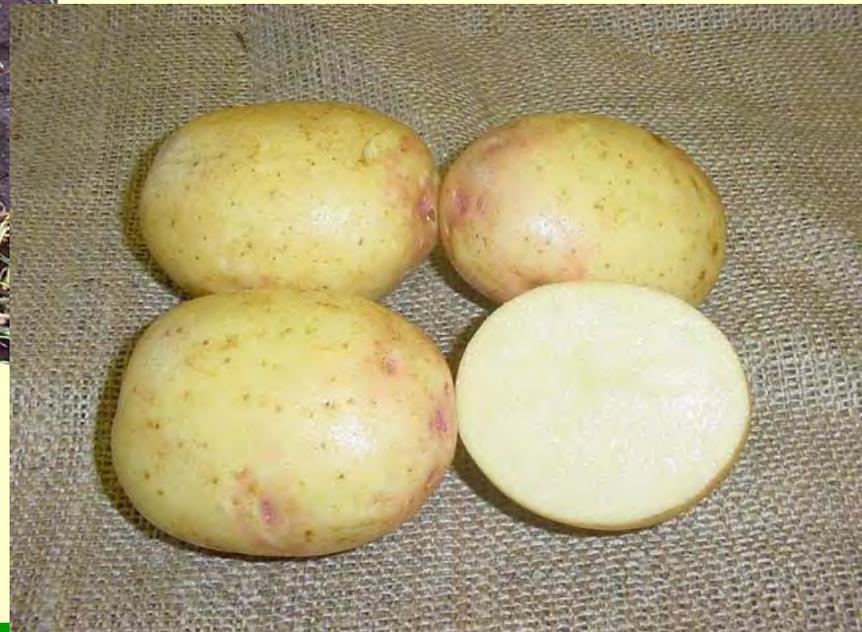
Field Trials

Scab

Crosses

7 years

Virus



Blight
Yield
Fry colour
Drought tolerance
Geneticists
Spraing

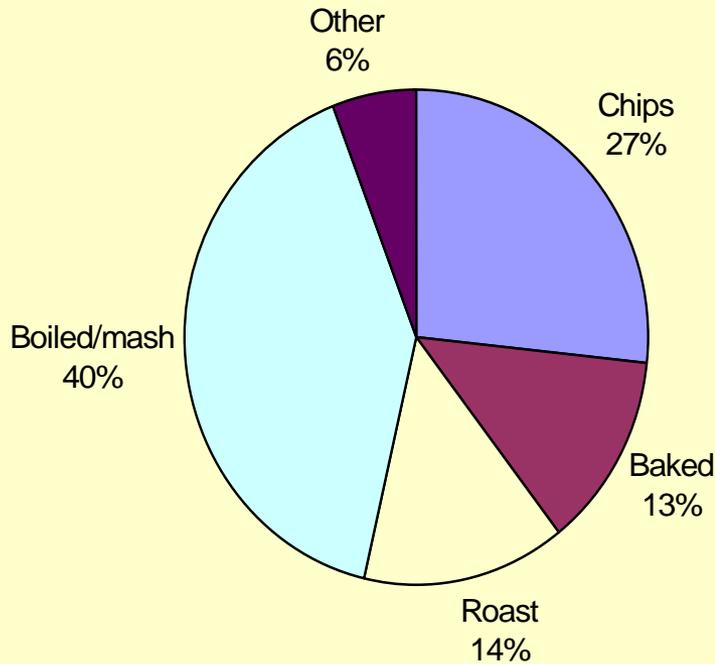
Understand the Consumer !



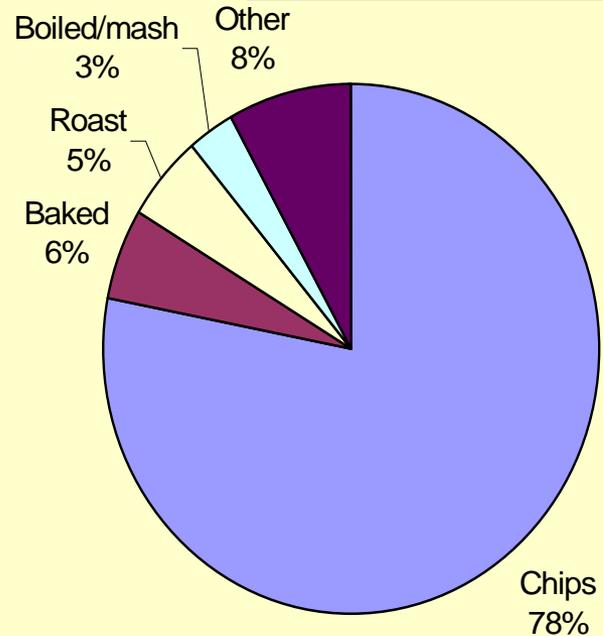


Potato meal types in and out of home

In-home meals
(including packed lunch)



Out-of-home meals
(excluding snacks)



Source: TNS Family Food Panel data from June 2004-May 2005

1995

10 year trend 

2005

11%

HEALTH

BSE, Foot & Mouth, Sudan 1,
Child Obesity, Jamie Oliver, Bird Flu,
Supersize me, Salt & sugar content,
Functional Foods, 5 a day, Fruit for schools

21%

34%

ENJOYMENT

Organics/ premium, Taste the difference,
Sharing, Café culture, Eating out,
Debit Credit, Treating

40%

55%

PRACTICALITY

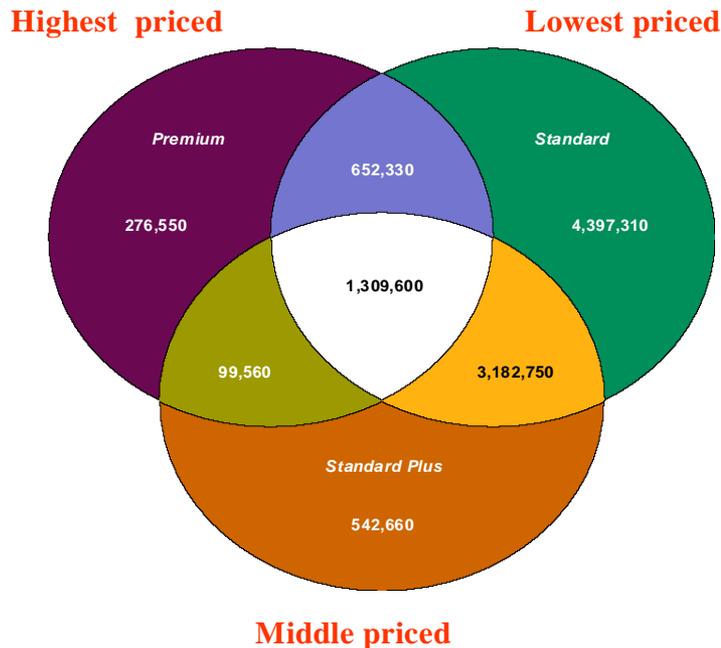
Ready Meals, Light meals,
Snacking, Budget, Microwave,
Individual portions, Quick to cook

39%



Worldpanel Usage In Home – Ann to Nov 2005

The potato category is a complex marketplace



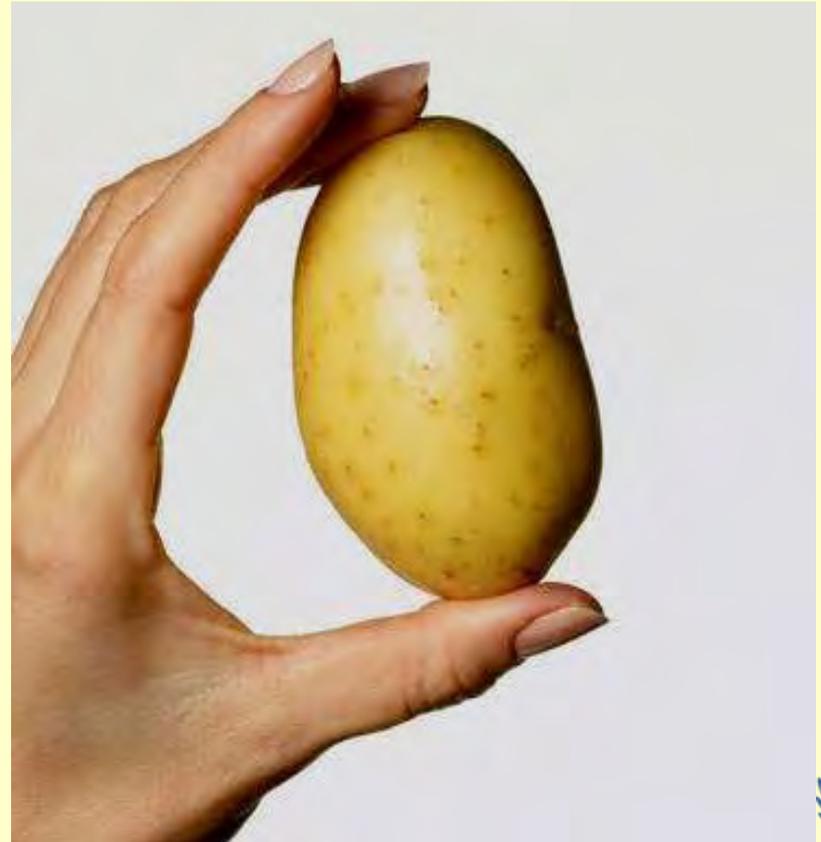
50% of shoppers in the potato category have only bought into one of these areas in the latest six months...

...38% of shoppers are happy to shop across two of these sectors...

...while only 13% will shop across all three

SCRI & Greenvale

- ◆ 18 year partnership
- ◆ SCRI
 - Genetics
 - Pest & Disease
 - Extensive parental material
 - Expert Breeding team
- ◆ Greenvale
 - Market leaders
 - Fresh, organic & processed
 - Consumer trends
 - Consumer taste panels
 - Fully integrated
 - Seed to table
- ◆ 10 varieties National Listed



Lady Balfour

- ◆ **Organic (Premium)**
 - Selected under organic production
- ◆ **SCRI multi trait**
 - Crossed 1988, NL 2001
- ◆ **Strengths**
 - Blight resistance
 - High yield / low fertility
 - Rapid bulking
- ◆ **Market**
 - Dominant UK organic variety
 - Sainsbury named pack
 - Egypt
- ◆ **Blue 13 blight ?**
- ◆ **Doesn't flower**

The natural choice for fresh potatoes

Lady Balfour

Organic Maincrop

Lady Balfour is the first potato variety bred specifically to be grown under organic conditions. The variety is named after Lady Eve Balfour, a pioneer of the organic movement and founder of the Soil Association in 1946

- Outstanding high yields
- Long dormancy
- Excellent blight resistance
- Excellent PCN ROI resistance

Lady Balfour is a very high yielding organic variety with excellent foliage and excellent tuber blight resistance.

The first potato to be specifically bred for organic production, Lady Balfour has the highest partial resistance to G. pallida of

Breeder	Scottish Crop Research Institute		
Maturity	Early Maincrop		
Market	Organic		
Skin Colour	White/Pale Red Eye		

Field Characteristics		Disease Resistance	
Tuber Yield	Very High	Foliage Blight	7
Tuber Number	Moderate	Tuber Blight	7
Tuber Shape	Oval	Blackleg	7
Dry Matter	Low 16-18%	Common Scab	4
Flesh Colour	Cream	Powdery Scab	9
Eye Depth	Shallow	Potato Leaf - Roll Virus	3
Dormancy	Long (8)	Virus Y	9
Brubing	5	PCN ROI	Partial Resistant
		PCN G. Pallida	Partial Resistance (5)
		Spaing	5
1 susceptible		9 resistant	
- no data		* SCRI Data	




Vales Sovereign

- ◆ Tesco named pack
 - Standard Plus
 - Not in shopping basket
- ◆ SCRI multi trait
 - Crossed 1993, NL 2003
- ◆ Strengths
 - Blackleg
 - Common scab
 - Drought
 - Black dot
- ◆ Reduced Carbon footprint
 - Low production costs
 - Reduced Nitrogen & Water
- ◆ Organoleptics
 - Highly rated & consistent
 - Top 20 UK variety
- ◆ Consistency for the consumer



Vales SOVEREIGN The natural choice for fresh potatoes

Early Maincrop
An extremely attractive potato with excellent disease resistance and superb eating quality

- Highest resistance to Black Dot of any commercial pre-pack variety available
- Good common scab resistance
- Attractive appearance
- Ideal for Integrated Crop Management production

Vales Sovereign is an exciting new variety and has already been approved by the UK's major supermarkets after topping taste panels.

Vales Sovereign's suitability to Integrated Crop Management production, exceptionally high yield and superior eating qualities, are making it a favourite of the growers too.

Grown for the general bakers' prepack market and offering low waste levels, **Vales Sovereign** is an early-maturing main crop with excellent cooking qualities.

The variety was taken from our multi-trait disease resistance program with SCRI. It demonstrates excellent disease resistance to Common Scab, Blackleg, PCN ROI, Black Dot and Blight, making it an ideal variety for growers, packers and consumers.

Breeder	Scottish Crop Research Institute	
Maturity	Maincrop	
Market	Table (prepack)	
Skin Colour	White Part Red	

Field Characteristics		Disease Resistance	
Tuber Yield	High	Foliage Blight	5
Tuber Number	Low/Moderate	Tuber Blight	3
Tuber Shape	Oval	Blackleg	8
Dry Matter	Moderate 18-20%	Common Scab	7
Flesh Colour	Cream	Powdery Scab	3
Eye Depth	Shallow	Potato Leaf - Roll Virus	2
Dormancy	*Moderate (4)	Virus Y	4
Bruting	6	PCN ROI	Resistant
		PCN G.Pollata	*Partial Resistance (5)
		Black Dot	High Resistance
		Wart Disease	Resistant (9)

1 susceptible
- no data

9 resistant
* SCRI Data

Vales Emerald

- ◆ Market Trend “Local”
 - Fresher
 - Less food miles
 - Local is the new organic
- ◆ Standard (regional)
 - “Suffolk Gems”
- ◆ New season
 - Early new potato
- ◆ Quickest pollen to plate
 - Crossed 1997
 - Ware “test” sales 2004
 - NL 2005
- ◆ 2,500 tonnes seed

The natural choice for fresh potatoes

Vales Emerald

First Early
An exciting new first early variety – ideal for baby potato production

- High tuber number
- Early bulking
- Excellent eating quality
- Attractive appearance

Vales Emerald, an outstanding early bulking variety available exclusively from Greenvale AP, is a Peer/Charlotte cross with an attractive appearance on the shelf, excellent flavour on the table and very robust characteristics in the field.

Vales Emerald, bred primarily for use within the punnet potato market, has shown yield increases of up to 25 per cent in comparison to standard existing punnet varieties in 2005 and is already proving to be an extremely popular variety with growers and retailers alike.

1 numbers, **Vales Emerald** 05. Combining early an ideal variety for retailers. ety can be packed off quickly and in

Breeder	Scottish Crop Research Institute	
Maturity	First Early	
Market	First Early/Baby Potatoes	
Skin Colour	Cream	

Field Characteristics		Disease Resistance	
Tuber Yield	Moderate	Foliage Blight	3
Tuber Number	High	Tuber Blight	4
Tuber Shape	Round	Blackleg	7
Dry Matter	16-20%	Common Scab	4
Flesh Colour	Cream	Powdery Scab	7
Eye Depth	Shallow	Potato Leaf - Roll Virus	4
Domancy	Short (3)	Virus Y	4
Brusing	6	PCN RD1	2
		PCN G Pallida	2
		Spraing	8
		Dry Rot	3

1 susceptible
- no data

9 resistant
* SCR Data



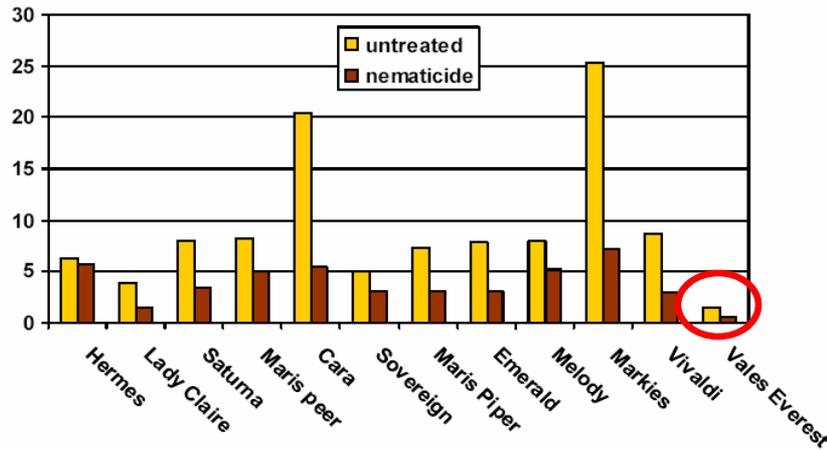
SUFFOLK GEMS

Locally produced quality potatoes



Vales Everest

Figure 10 – Effect of variety and nematicide on PCN population dynamics (Pf:Pi).



Grow**Science**

Maincrop

An exceptionally high yielding variety – suitable for processing

- Performed well in organic trials.
- Sought after by several processing companies.
- Achieved conditional approval for major retailers lists.
- Very high yielding.

Vales Everest is well regarded as a good maincrop potato, particularly suitable for those growing in hot dry climates such as the Mediterranean.

This drought tolerant variety has shown to offer good tolerance levels to a number of the more common diseases, particularly Blackscurf, PVY and Powdery Scab.

Vales Everest has a particularly high level of tolerance and resistance to PCN Pallida and is resistant to PCN RO1 making it a major player in the management of PCN in the potato rotation.

Offering good dry matters of between 19 and 21%, this particularly high yielding variety has proved popular, particularly for those growing for the French fry and general ware potato markets in the UK and has also proved itself to be an excellent 'crisper' when grown in hot climates such as Israel.

The natural choice for fresh potatoes

Breeder	Scottish Crop Research Institute	
Maturity	Maincrop	
Market	Organic/Fresh/French Fry/Roast	
Skin Colour	White/Pale Pink Eye	

Field Characteristics		Disease Resistance	
Tuber Yield	Very High	Foliage Blight	4
Tuber Number	Moderate	Tuber Blight	4
Tuber Shape	Oval	Blackleg	4
Dry Matter	19-21%	Common Scab	4
Flesh Colour	Cream	Powdery Scab	6
Eye Depth	Shallow	Potato Leaf - Roll Virus	5
Dormancy	6	Virus Y	7
Brusing	6	PCN RO1	5
		PCN G Pallida	8
		Spring	5
		Dry Rot	5

1 susceptible
- no data

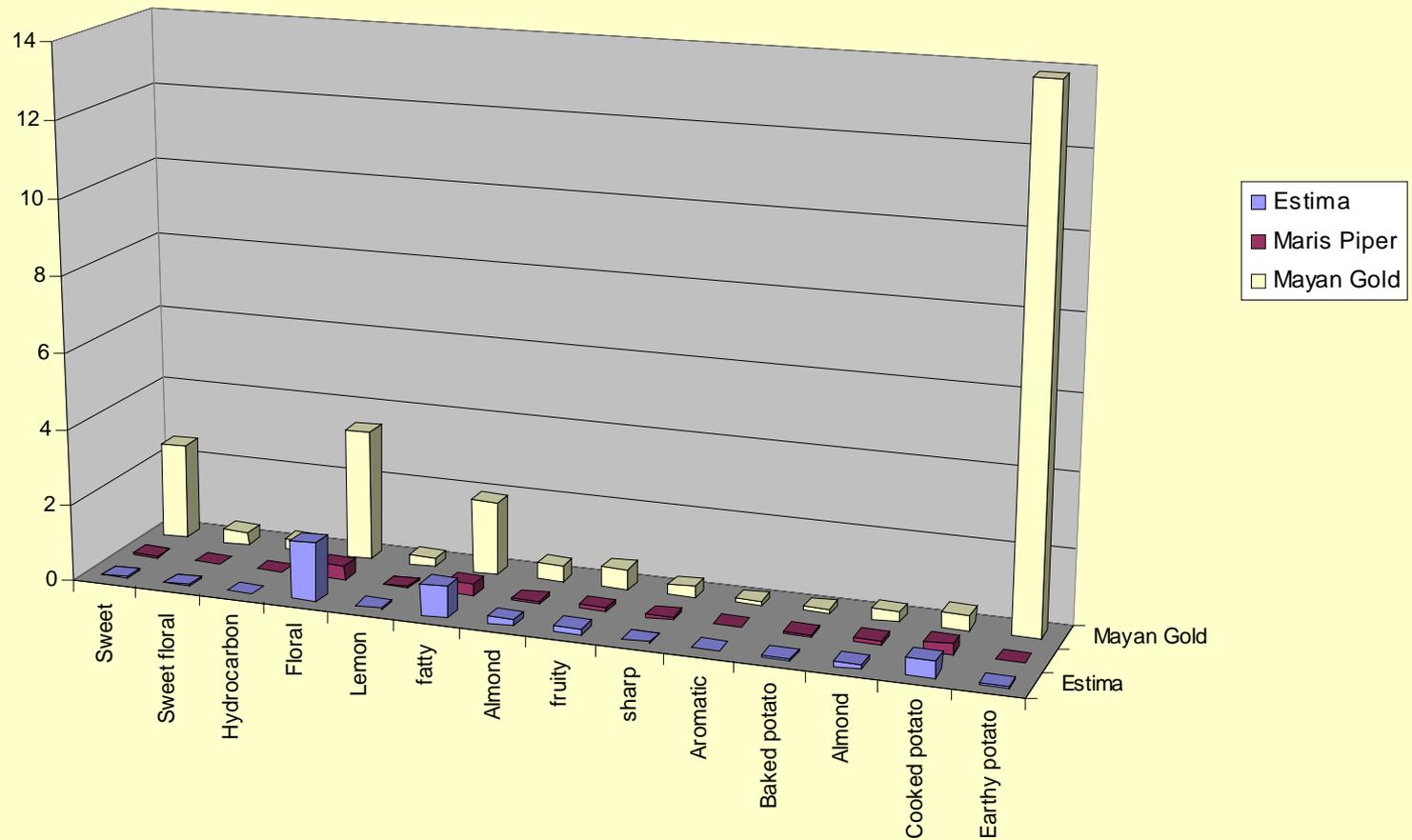
9 resistant
* SCRI Data

Re-Discovering Flavour

- ◆ Phureja Potatoes
- ◆ SCRI
 - Long day adapted population
- ◆ Departure from the “norm”
 - Deep yellow flesh
 - Smooth texture
 - Prominent flavour
- ◆ Hurdles
 - Low yields (cost of production !)
 - Disintegration when boiled
 - Appearance
 - Short dormancy



LINK Flavour Project



Umami

◆ The 5th Flavour Sensation

- Sweet, Sour, Salty, Bitter
- "Umami"**

◆ SCRI

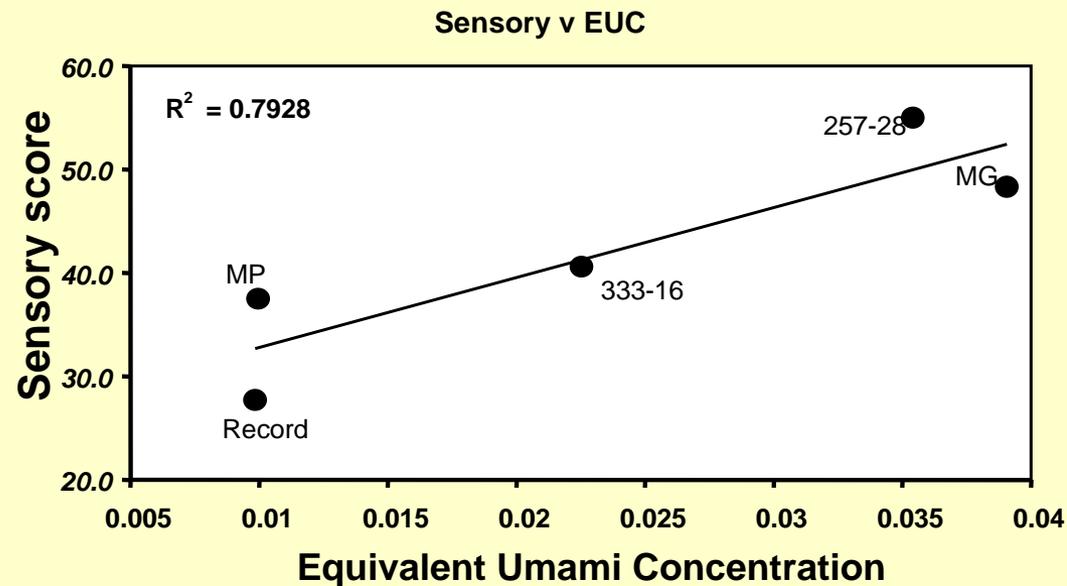
- Dr Mark Taylor

◆ Phureja elevated levels

- Consumer preference

◆ Market Niche Potential

- Backed by good science
- Good PR story
 - Home of the potato
 - Unique Umami flavour



Mayan Gold

- ◆ Premium
 - Tesco Finest
 - Sainsbury Taste The Difference
- ◆ Should have been a winner



- BUT
- Consumers by with their eye first
- Packaging message v Corporate ID
- Price

- ◆ Consumer
 - A potato is just a potato !

Mayan Gold

The natural choice for fresh potatoes

Maincrop
A Distinctive variety - ideally suited for processing into gourmet potato products

- Golden coloured gourmet potato
- Unrivalled nutty flavour
- Roasts, crisps or chips

Unlike modern European potatoes, **Mayan Gold** has its roots firmly planted in the foothills of the Andes of Peru, where its ancestors were once farmed by the Incas. **Mayan Gold** is a golden coloured tuber with a real taste of history.

Offering a nutty flavour, **Mayan Gold** was national listed in 2001, and has since proved to be an exceptional variety for chip, crisp and roast manufacturing.

Aimed at the "best in class sector" **Mayan Gold** has already been bought by many top chefs, including several currently working on television, for use in their own restaurants, a real testament to the unique taste and flavour of this variety.

Originally developed in association with the SCRI it has already been successfully grown on a commercial basis in the UK and offers entry into a fast developing sector of the industry.

www.mayanpotatoes.co.uk
The original taste of potatoes

Breeder	Scottish Crop Research Institute	
Maturity	Maincrop	
Market	Specialist Gourmet	
Skin Colour	Yellow	

Field Characteristics		Disease Resistance	
Tuber Yield	Medium/Low	Foliage Blight	7
Tuber Number	Very High (9)	Tuber Blight	4
Tuber Shape	Long Oval	Blackleg	5
Dry Matter	21%	Common Scab	8
Flesh Colour	Golden	Powdery Scab	8
Eye Depth	Medium	Potato Leaf - Roll Virus	5
Dormancy	Short (4)	Virus Y	5
Bruising	6	PCN R01	Susceptible
		PCN G/Pollida	Susceptible
		Sprong	8*
		Dry Rot	8*

1 susceptible
- no data

9 resistant
* SCRI Data

THE QUEEN'S AWARDS
FOR ENTERPRISE
INNOVATION
2006

Greenvale AP

The natural choice for fresh potatoes...

"Mayan" Series

Mayan Queen

The natural choice for fresh potatoes

Maincrop

An exciting Phureja variety – perfect for pre-pack with the unique "Umami" flavour as Mayan Gold

- High saleable yield
- Long dormancy
- Good disease resistance
- Suitable for pre-pack organic production

Mayan Queen is a very exciting addition to the unique Mayan potato series of varieties from Greenvale AP. **Mayan Queen's** origins are from the foothills of the Andes of Peru just like its sister variety Mayan Gold.

Mayan Queen has been selected exclusively with the Scottish Crop Research Institute to offer potatoes with the same rich yellow flesh and unique "Umami" flavour of Mayan Gold, but more suitable for baking and wedges.

Mayan Queen has a particularly smooth texture and has topped a series of premium taste panels organised by some of the UK's leading retailers. The Mayan Potatoes have proved particularly popular with gourmet chefs for use in the catering industry and are endorsed by Antony Worrall Thompson. All our Mayan Potatoes cook in two thirds of the normal cooking time because of their delicate nature while preserving that perfect potato flavour.

www.mayanpotatoes.co.uk
The original taste of potatoes

Breeder	Scottish Crop Research Institute		
Maturity	Maincrop		
Market	Table (prepack)		
Skin Colour	Pale Red Eye		
Field Characteristics		Disease Resistance	
Tuber Yield	Moderate	Foliage Blight	5
Tuber Number	Moderate	Tuber Blight	4
Tuber Shape	Long Oval	Blackleg	8
Dry Matter	Medium	Common Scab	8
Flesh Colour	Yellow	Powdery Scab	6
Eye Depth	Deep	Potato Leaf - Roll Virus	-
Dormancy	Short (S)	Virus Y	-
Brusing	7	PCN R01	Susceptible
		PCN G Pallida	Susceptible
		Spraing	-
		Dry Rot	4
1 susceptible	9 resistant		
- no data			
N.B. All provisional data based on Greenvale trials.			

Mayan twilight

The natural choice for fresh potatoes

Maincrop

An exciting Phureja variety – perfect for pre-pack with unique "Umami" flavour as Mayan Gold

- High saleable yield
- Long dormancy
- Good disease resistance
- Suitable for pre-pack organic production

Mayan Twilight is a very exciting addition to the Mayan potato varieties from Greenvale AP, offering something a little different. A unique appearance of this attractive red and white skinned salad type potato is just the wrapping to an even more exquisite experience inside. This deep yellow dense flesh with a flavour that is both sweet and mouth will make a talking point of any fine dinner party.

Mayan Twilight's origins are from the foothills of the Andes in Peru, as are Greenvale's two other 'Phurejas' Mayan Gold and Mayan Queen.

Mayan Twilight has been selected from the Phureja lines developed exclusively with Scottish Crop Research Institute to offer potatoes ideal for a salad eaten either hot or cold with skins on. Best steamed to preserve the skin colour **Mayan Twilight** has particularly excited some of our customers who have reserved all of our production for years to come. All our Mayan Potatoes cook in two thirds of the normal cooking time due to their delicate nature while preserving that perfect potato flavour.

www.mayanpotatoes.co.uk
The original taste of potatoes

Breeder	Scottish Crop Research Institute		
Maturity	Maincrop		
Market	Table (prepack)		
Skin Colour	Red and White		
Field Characteristics		Disease Resistance	
Tuber Yield	Low	Foliage Blight	5
Tuber Number	Moderate	Tuber Blight	4
Tuber Shape	Very Long Oval	Blackleg	8
Dry Matter	Medium	Common Scab	8
Flesh Colour	Deep Yellow	Powdery Scab	6
Eye Depth	Moderate	Potato Leaf - Roll Virus	-
Dormancy	Short (S)	Virus Y	-
Brusing	7	PCN R01	Susceptible
		PCN G Pallida	Susceptible
		Spraing	-
		Dry Rot	4
1 susceptible	9 resistant		
- no data			
N.B. All provisional data based on Greenvale trials.			



THE QUEEN'S AWARDS
FOR ENTERPRISE
INNOVATION
2006



Greenvale AP

The natural choice for fresh potatoes...

Thank You For Your
Attention