

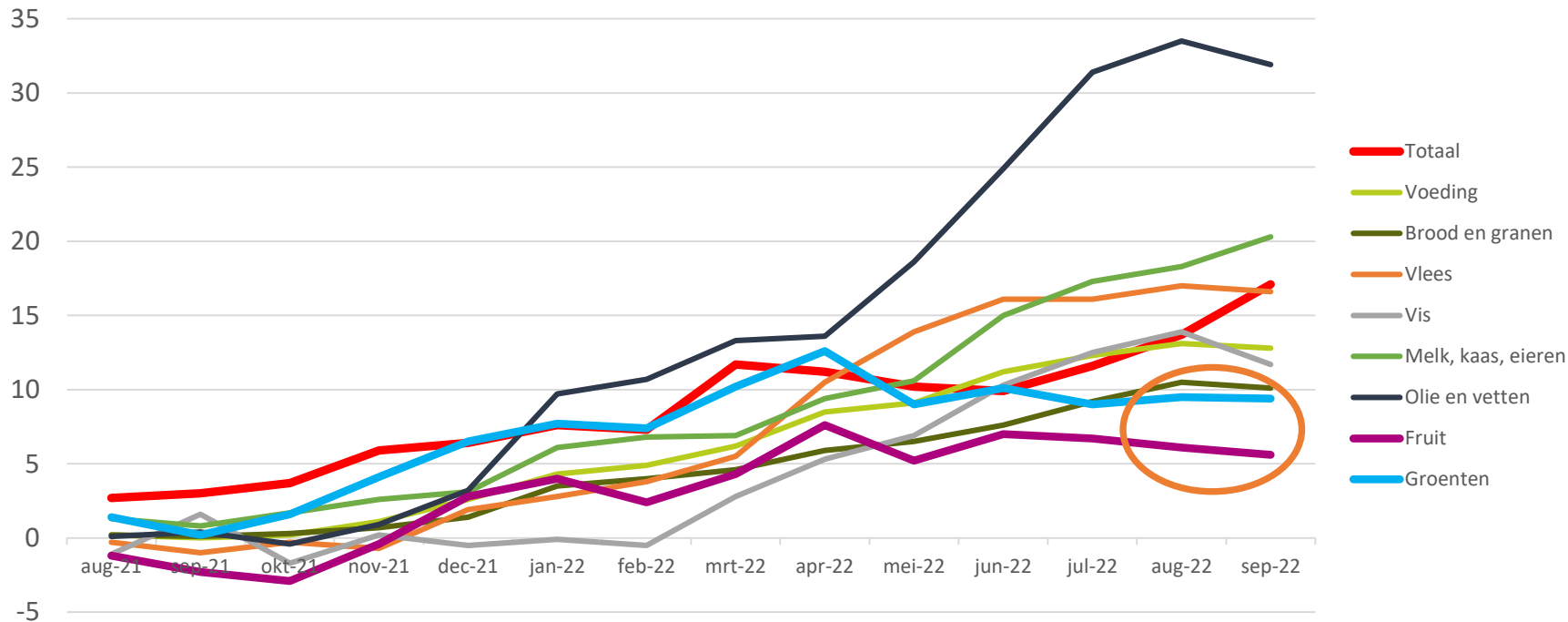
Market observation



Willem Rodenburg
21 oktober 2022
Brussels

NL inflation Fruit 5%, Veggies 9%, total 17% NL

Inflation last 12 months NL (source CBS)



Fresh tomato sales

First 6 months **2022** compare with first 6 months **2021**

In general: post Corona effect: sales in retail should drop 10- 15% in volume (horeca)

- NL: 7 % less volume in retail, 14 % higher price
 - Less production of “local” (-15% NL) pushes up prices, NL retail “understands”
 - Sales retail: 8% classic round, 32 % tross (>47mm), 60% specials/mini/cherry(<47)
- GER:
 - Tomatoes: 10 % less volume in retail, 12 % higher price
 - Frischgemuse (fresh vegetables): 10% less volume, 0% higher price

Data of 3th quarter not yet available !

Increase of costs

Costs in the chain

- Increase of costs of carton package (+20%), plastic and extra costs of cleaning re-usable packaging
- Increase of costs of pallets (+100%)
- Increase of costs transport (diesel)
- Increase of costs (and reduction of availability of) labour (5-8 %)
- Increase of insurances
- Increase of costs of cooling / dispatching etc.

Costs / developments at the NL production farms

- costs of fertilizers etc
- costs of energy: depending on short/midterm/long contracts: 0% - 500%
- Fix costs versus kg's to be produced: 11 months or 8 months ?
- Availability of labour
- Possibilities of opening new geothermal heat sources

Lead in 2022 to 5-10 % lower annual production in NL(back to “old” seasons”)

Outlook 2023

- Tomatoes will be produced and sold more local (<800 kms), in more traditional season
- Not all varieties fit in each market !
- Will / can the retailer adapt the “new” market rules
- Cost in the chain are more easy added in the retailprice then extra costs of the production
→ **Producer is not compensated and see costs at his farm rising extremely**
- High volatile market due to:
 - Changing production seasons: periods with high volumes in the market
 - North / South production overlap, but some interesting new developments of transnational cooperation between PO's
 - Diseases and solutions
 - Geopolitical changes (currency rates, situation in UK(R), ...,)
 - Groups of consumers not willing or able to pay for their daily intake of F+V