

# Markets for fresh Tomatoes in Germany and Europe

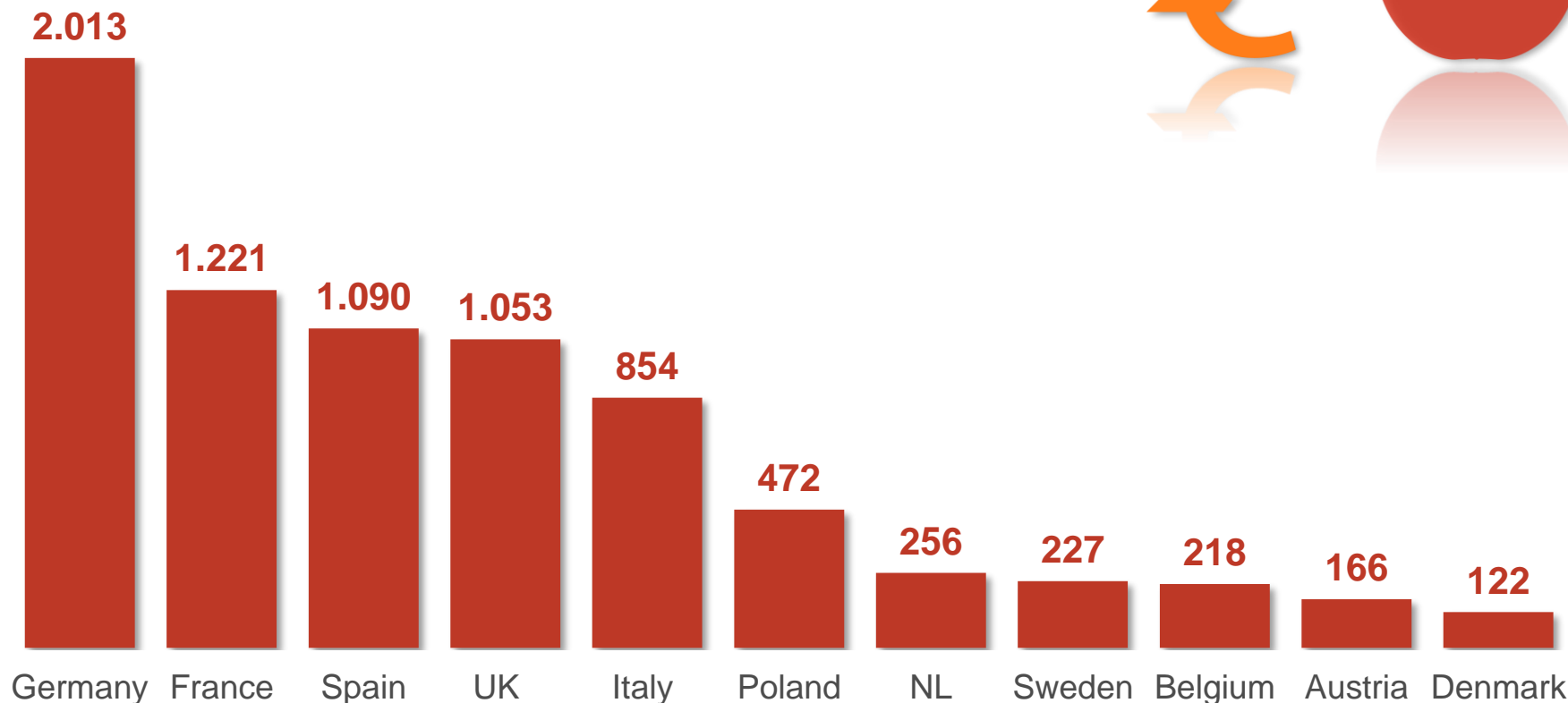
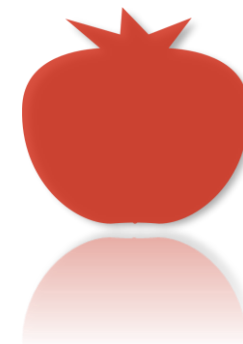
**EXPERT GROUP FRUIT AND VEGETABLES MARKET  
OBSERVATORY - TOMATOES  
MEETING OF THE EXPERT GROUP, 2023-06-19**

**AMI, GERMANY**

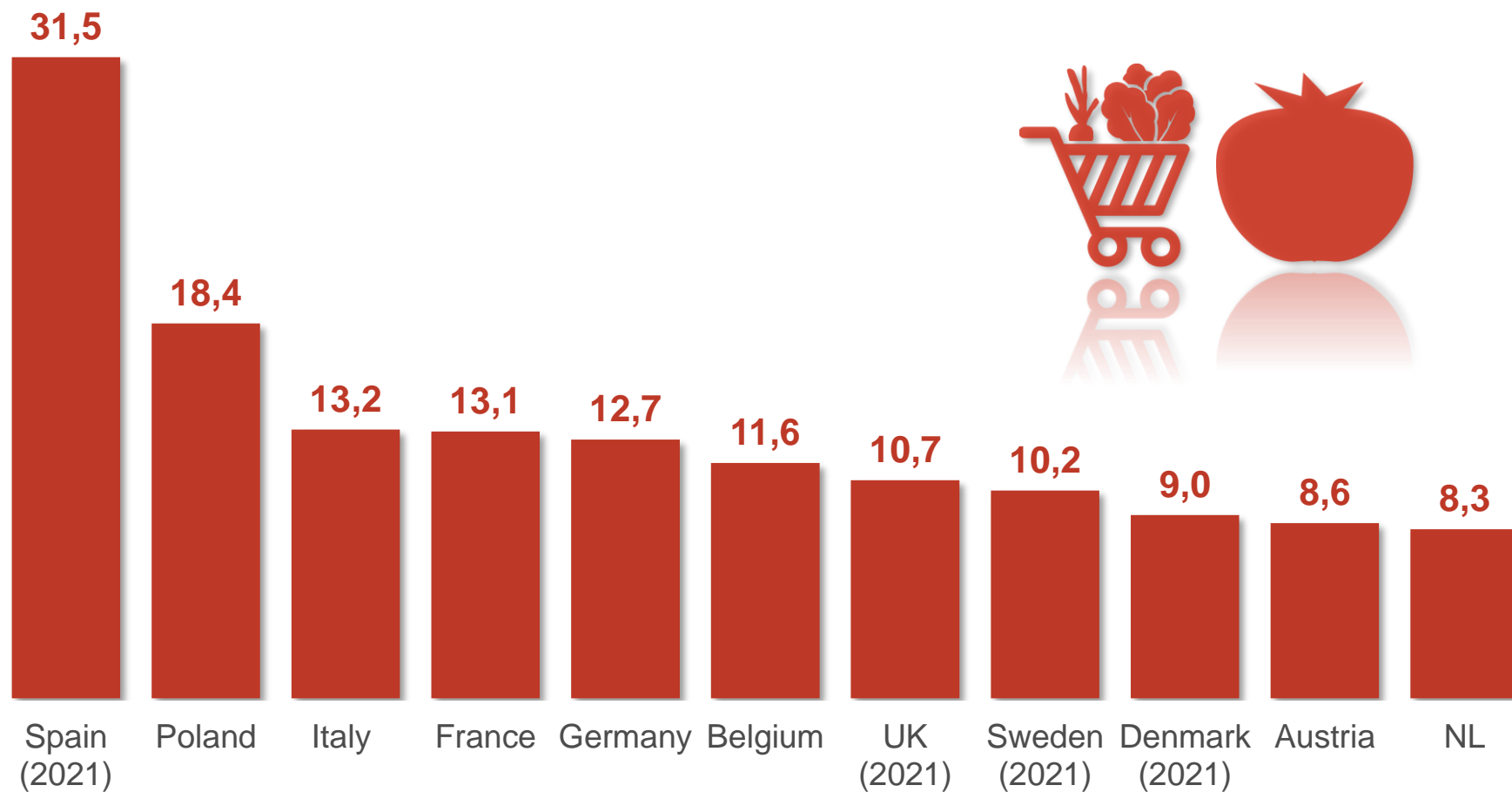


*Facts for Decisions.*

# Retail Turnover with fresh Tomatoes in some European Countries, 2021, Mio. EUR

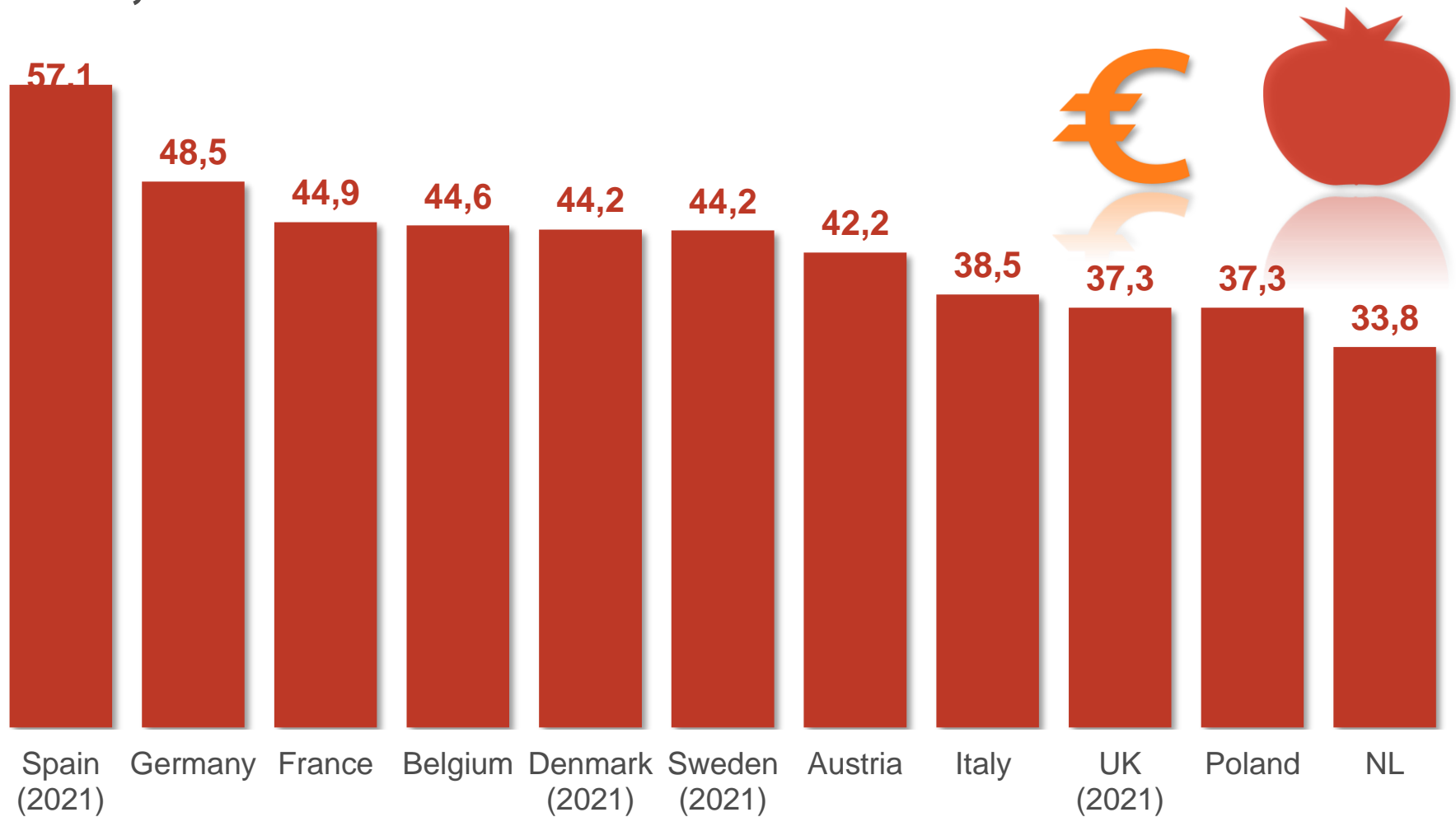


# Quantities of fresh tomatoes bought by private Households, 2022, in kg/Household

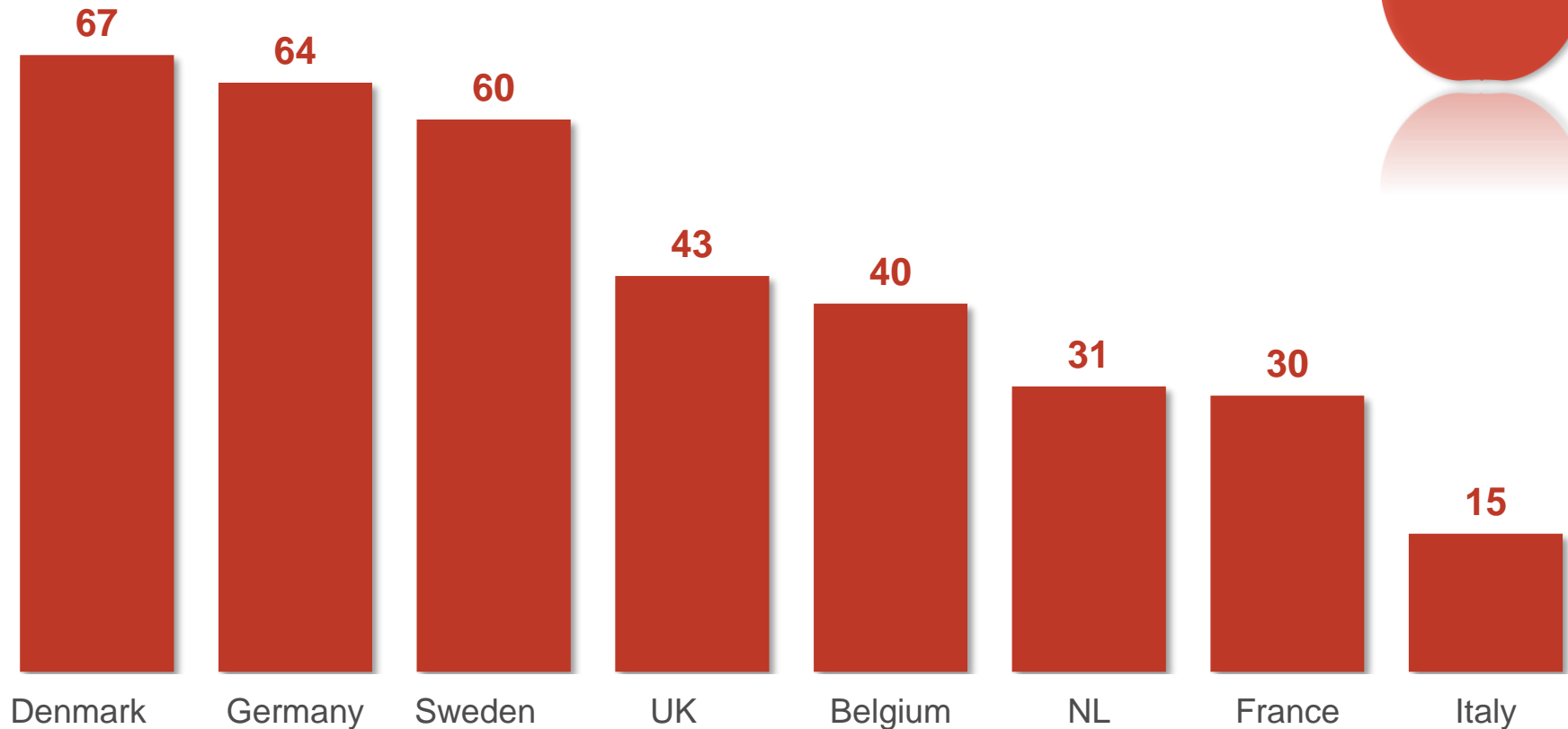
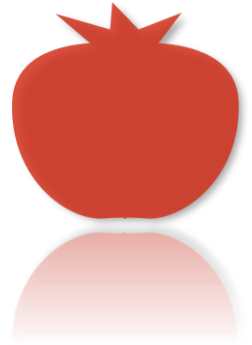


# Consumer expenditure for fresh tomatoes, 2022, in EUR/Household

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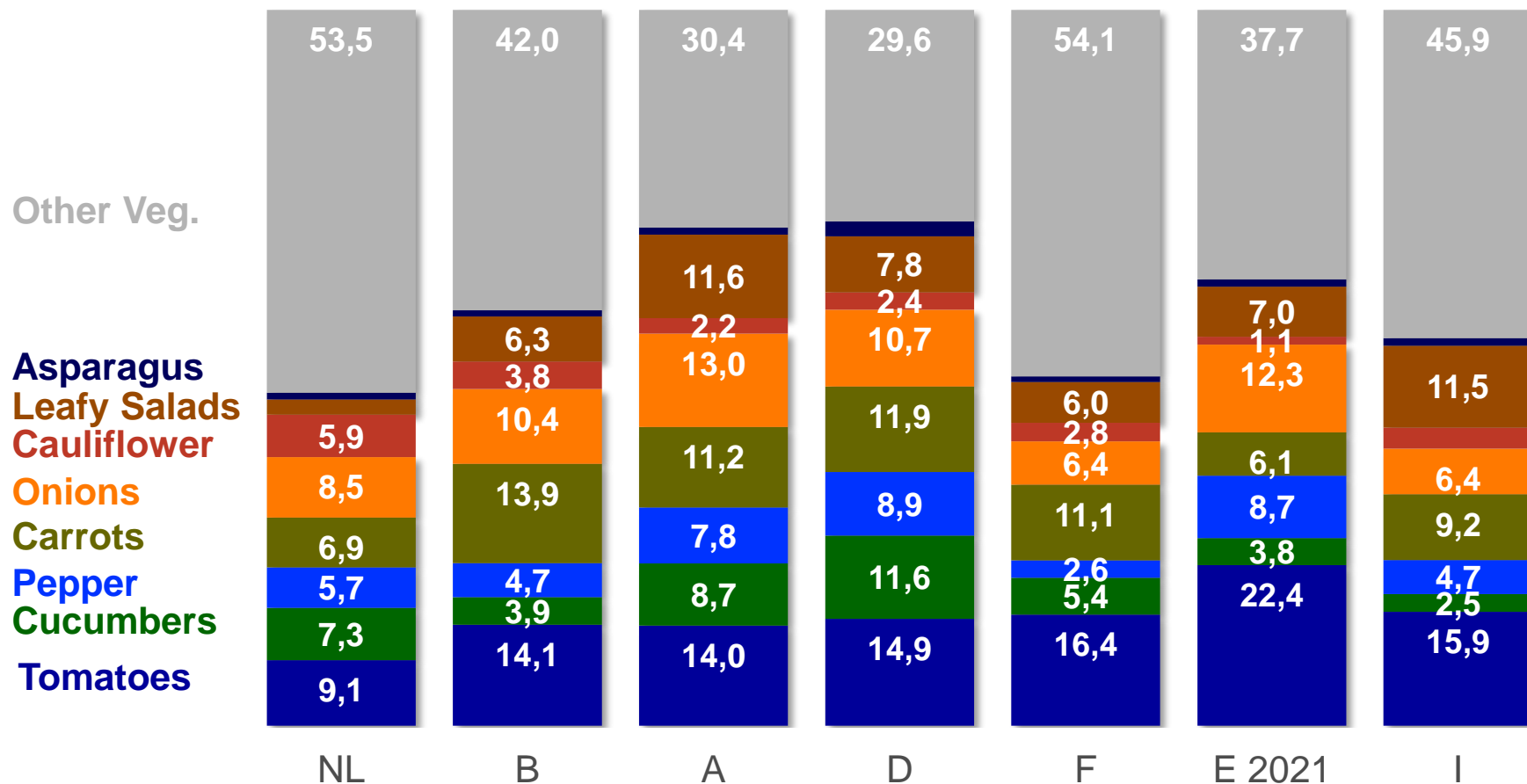
# Share of “small” Tomatoes in expenditure for fresh tomatoes, 2021, in %



# Tomatoes No. One (almost) everywhere



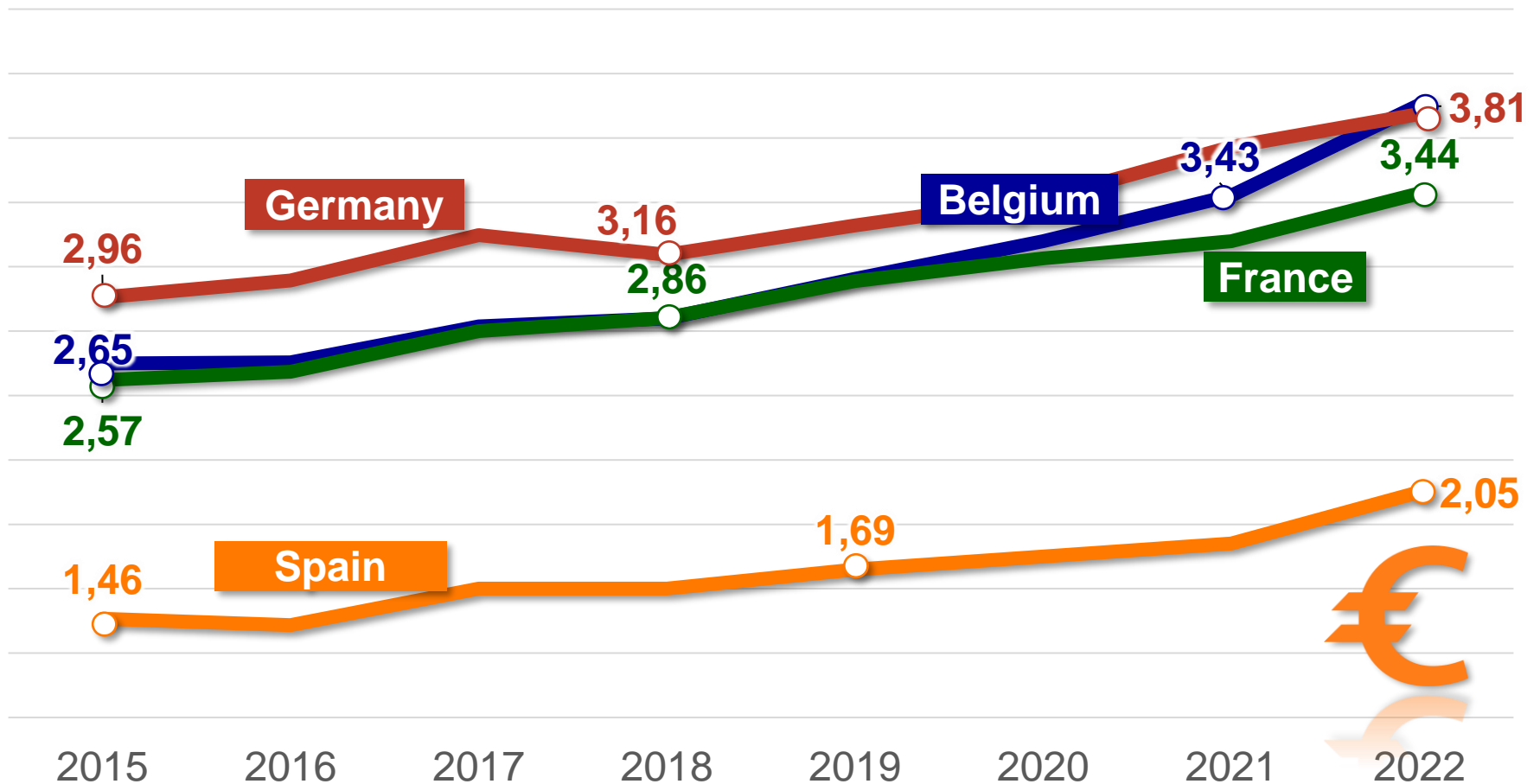
Quantities bought by private households by species in some European countries, 2022, in % of total Purchases of fresh vegetables



# France, Belgium, Germany comparable?

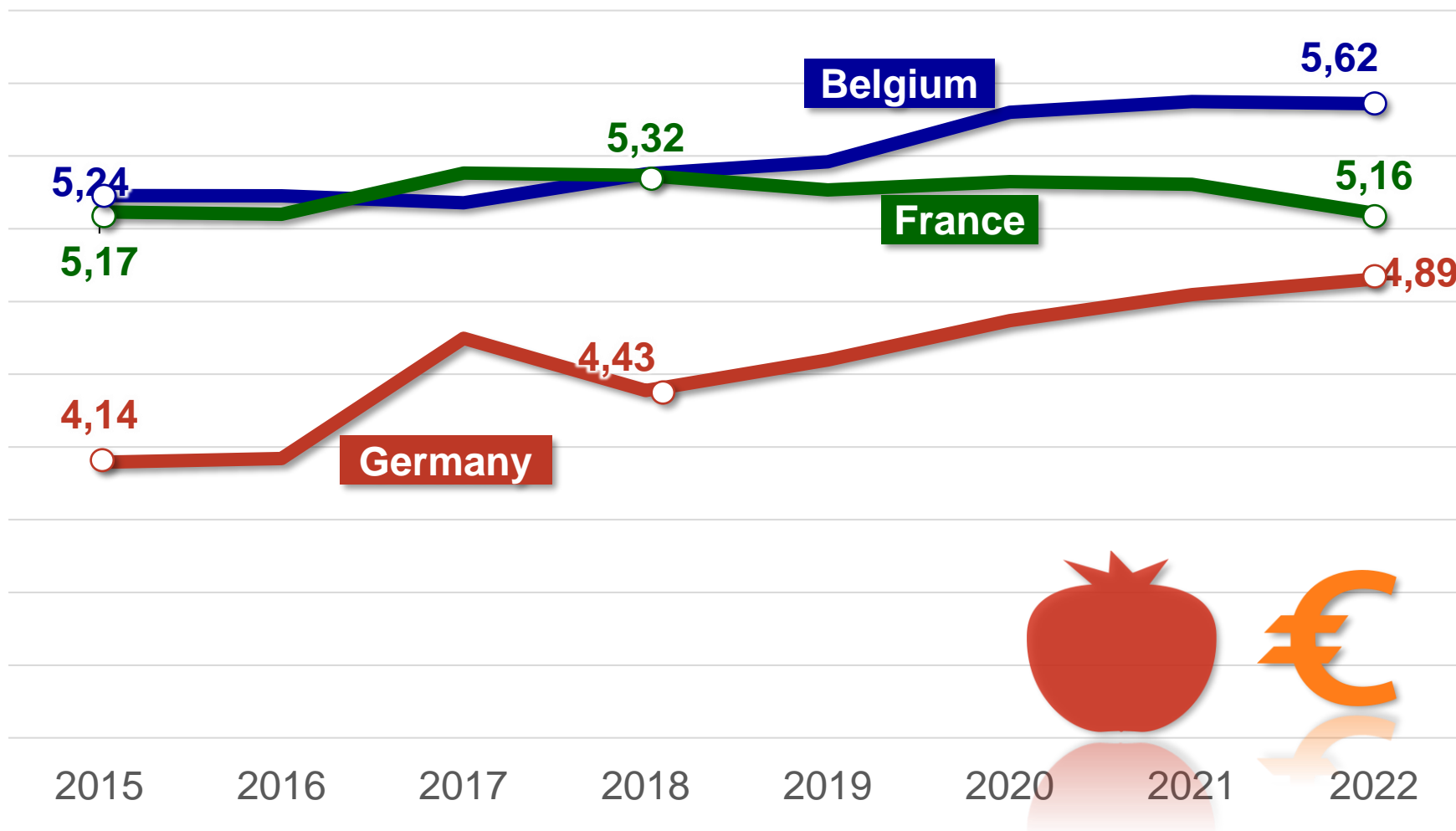


Average consumer prices paid for **Tomatoes, all types**, in EUR/kg



# Germany with low price, as expected

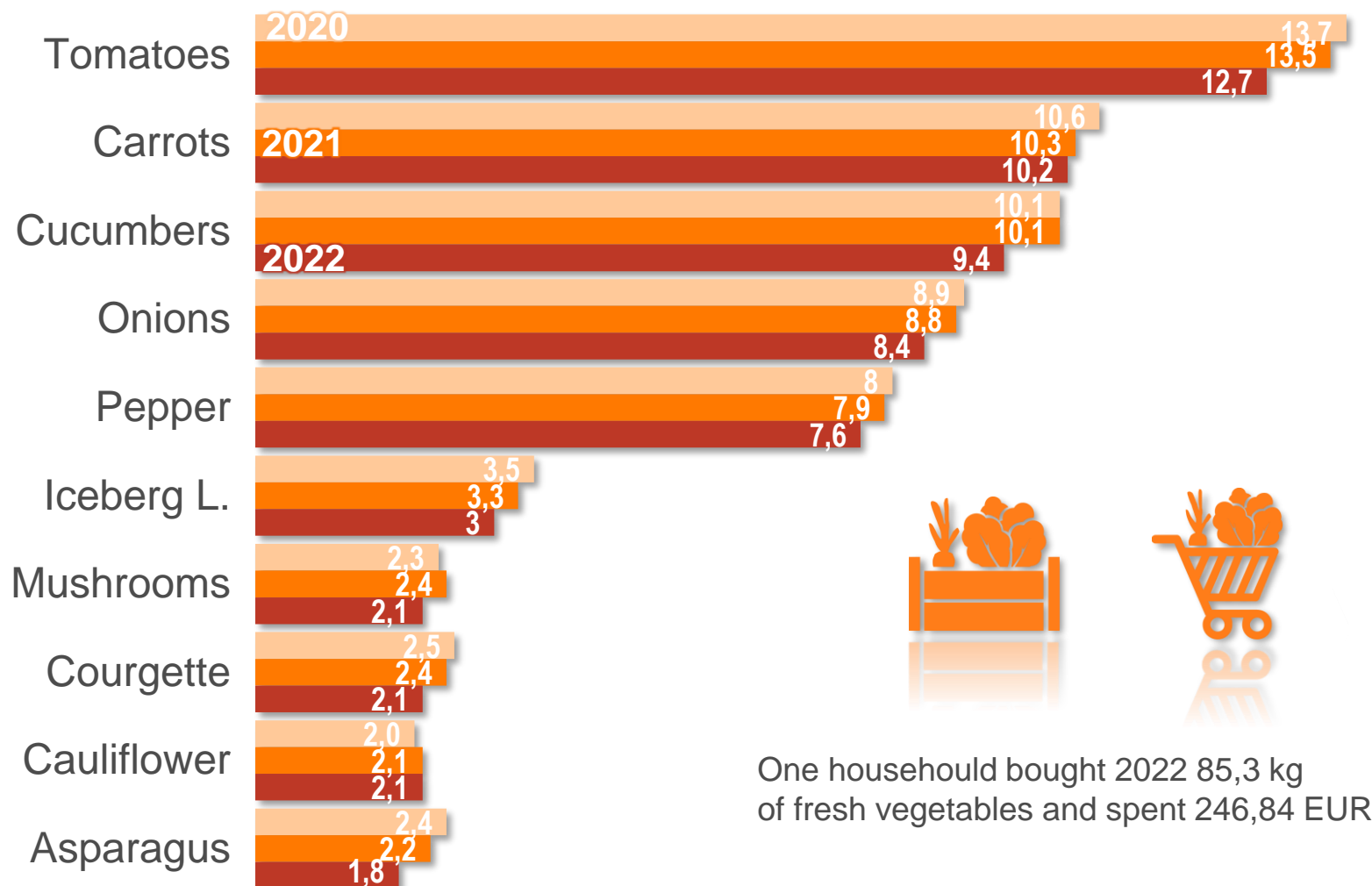
Average consumer prices paid for **Cherrytomatoes**, all types, in EUR/kg





# Top 10 of fresh vegetables

Quantities bought in kg/household in Germany

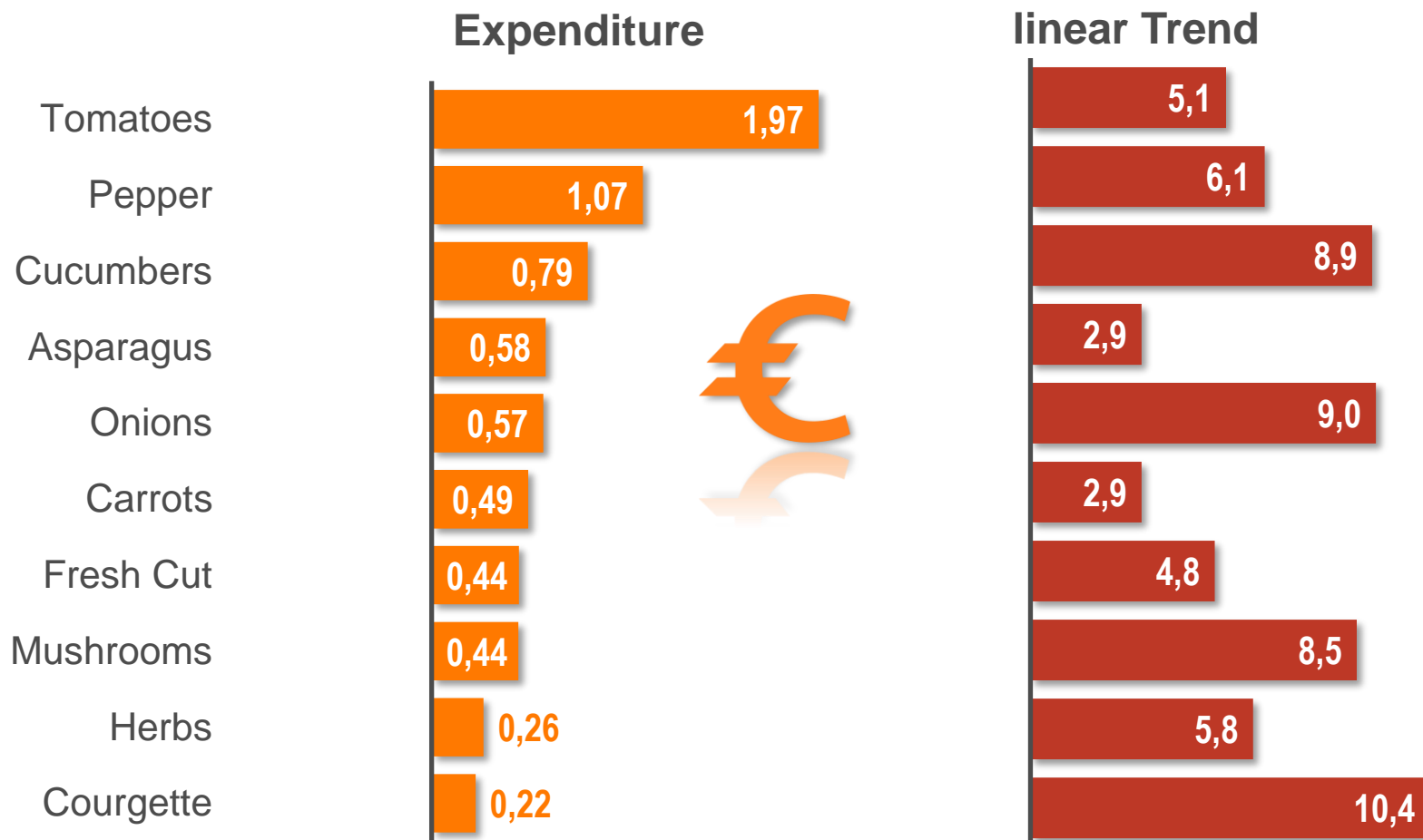


One household bought 2022 85,3 kg of fresh vegetables and spent 246,84 EUR

# Different ranking for expenditures

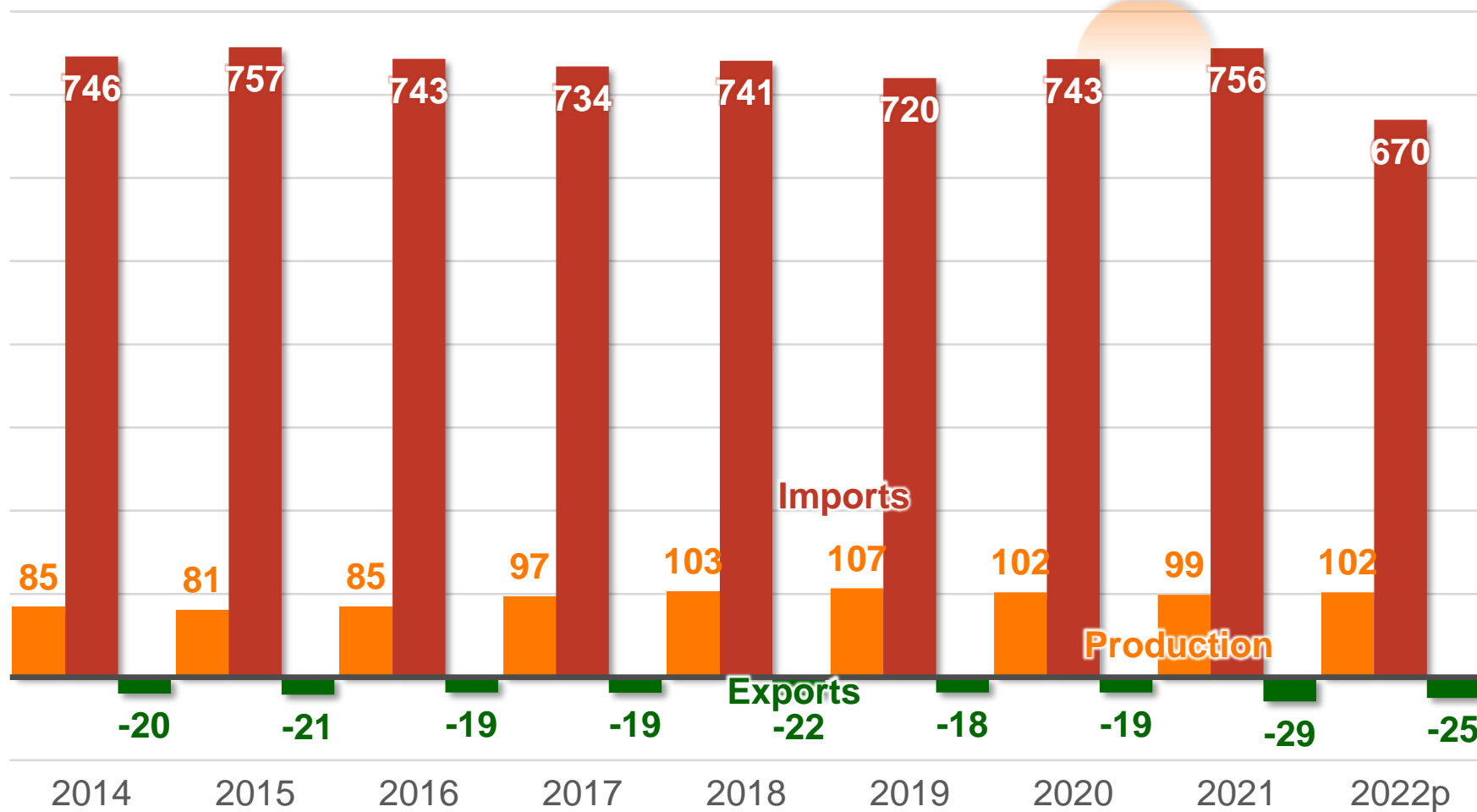


Consumer expenditure for fresh vegetables in Germany, 2022, in billion EUR and in % p.a. (2017-2022, lin. trend)



# Imports still dominant

Supply balance for fresh tomatoes in Germany, in 1,000 t

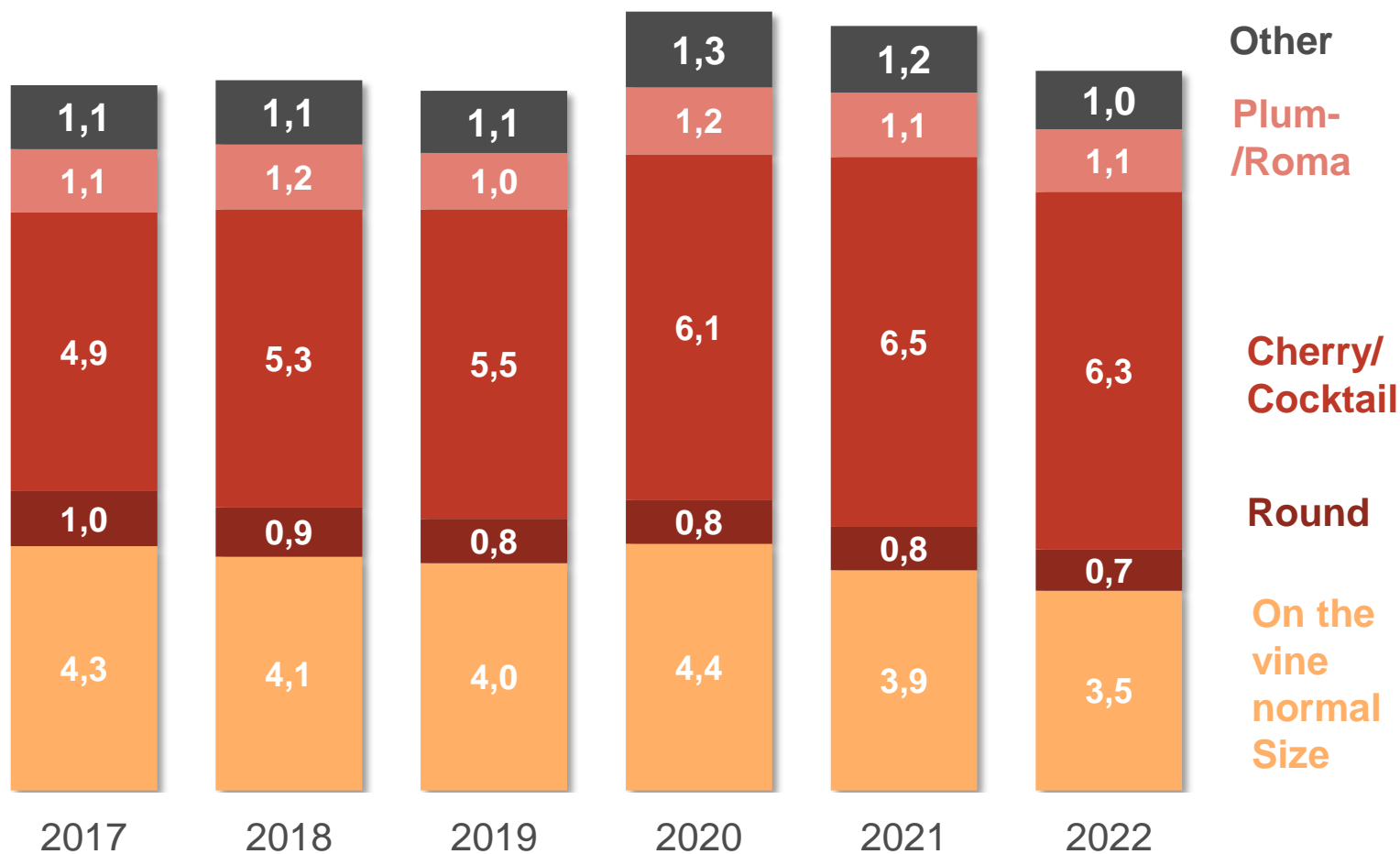


Foreign Trade 2022 preliminary.

# High purchases in 2020 and 2021



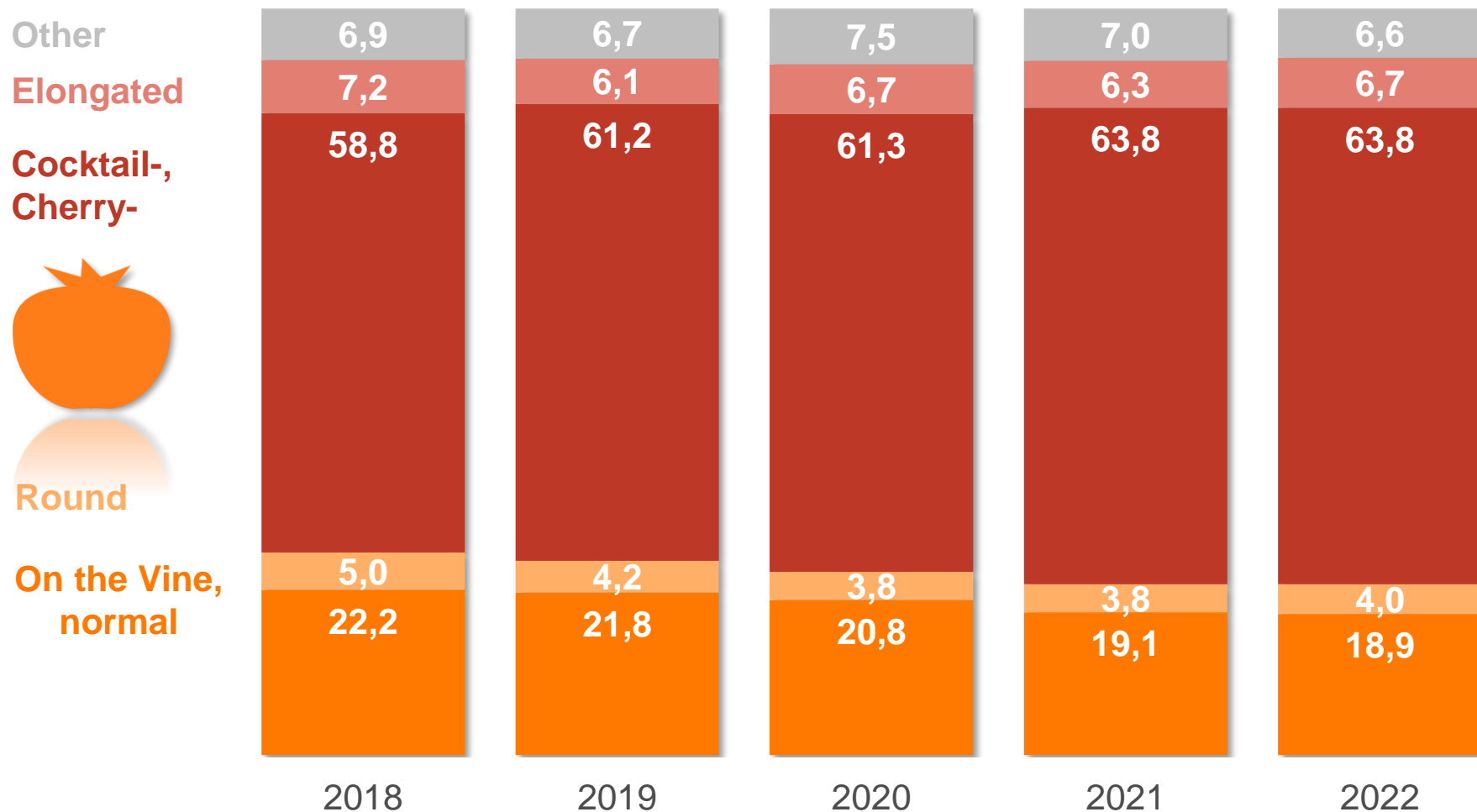
Tomatoes by segment bought in Germany, in kg/Household



# Over 60 % for small tomatoes



Segment share in total spendings for fresh tomatoes in Germany, in %  
(share in expenditure)



# Small and cheap grows in 2023!



Segment share in total consumer expenditure for fresh tomatoes bought in Germany, Jan-April, in %

Other

Plum (elongated)

Beef

Cocktail-/Cherry-long, on the vine

Cocktail-/Cherry-long, not vine

Coctail-/Cherry-round, on the vine

Cocktail-/Cherry-round, not vine

Round

On the Vine, normal size

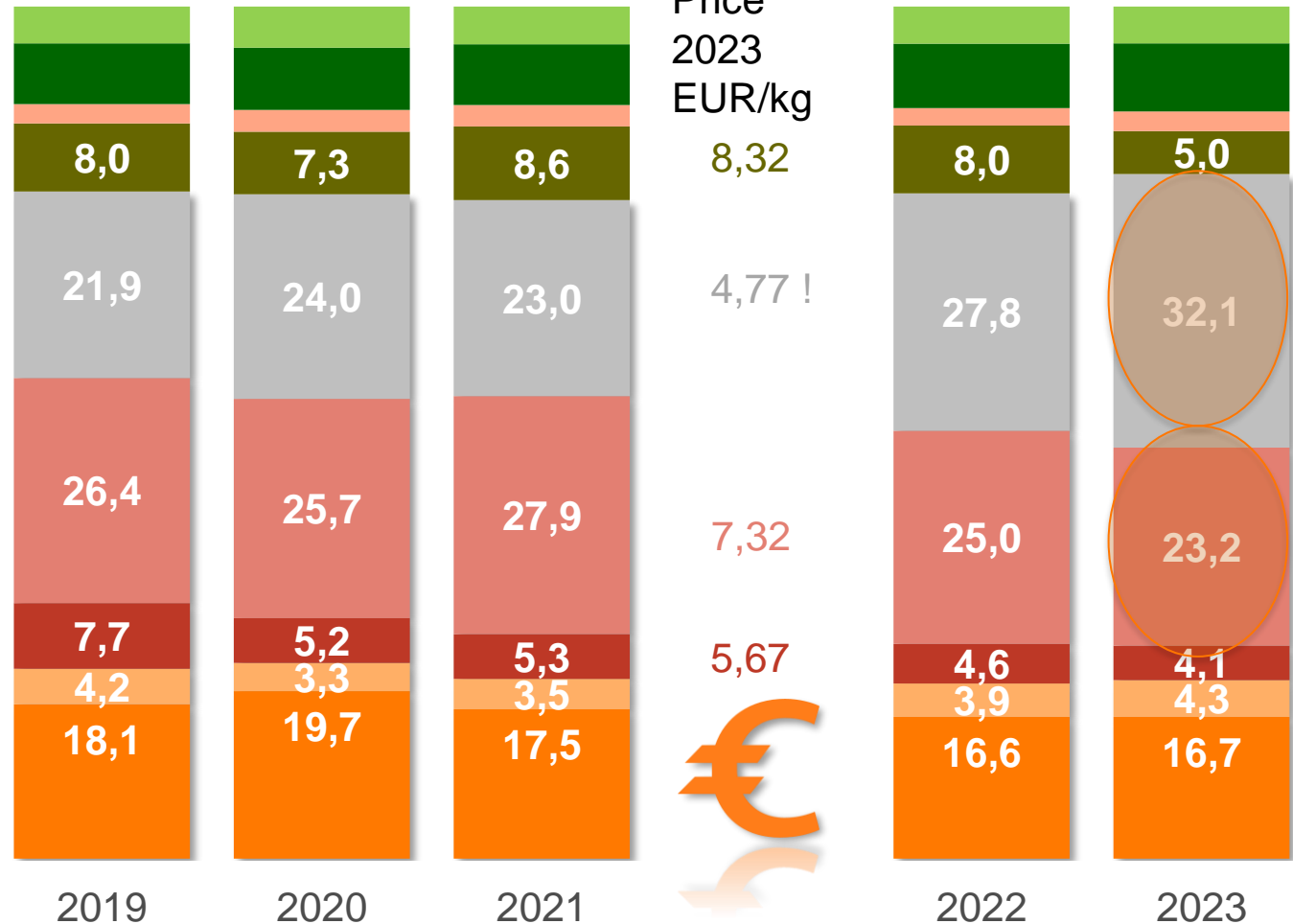
Price  
2023  
EUR/kg

8,32

4,77 !

7,32

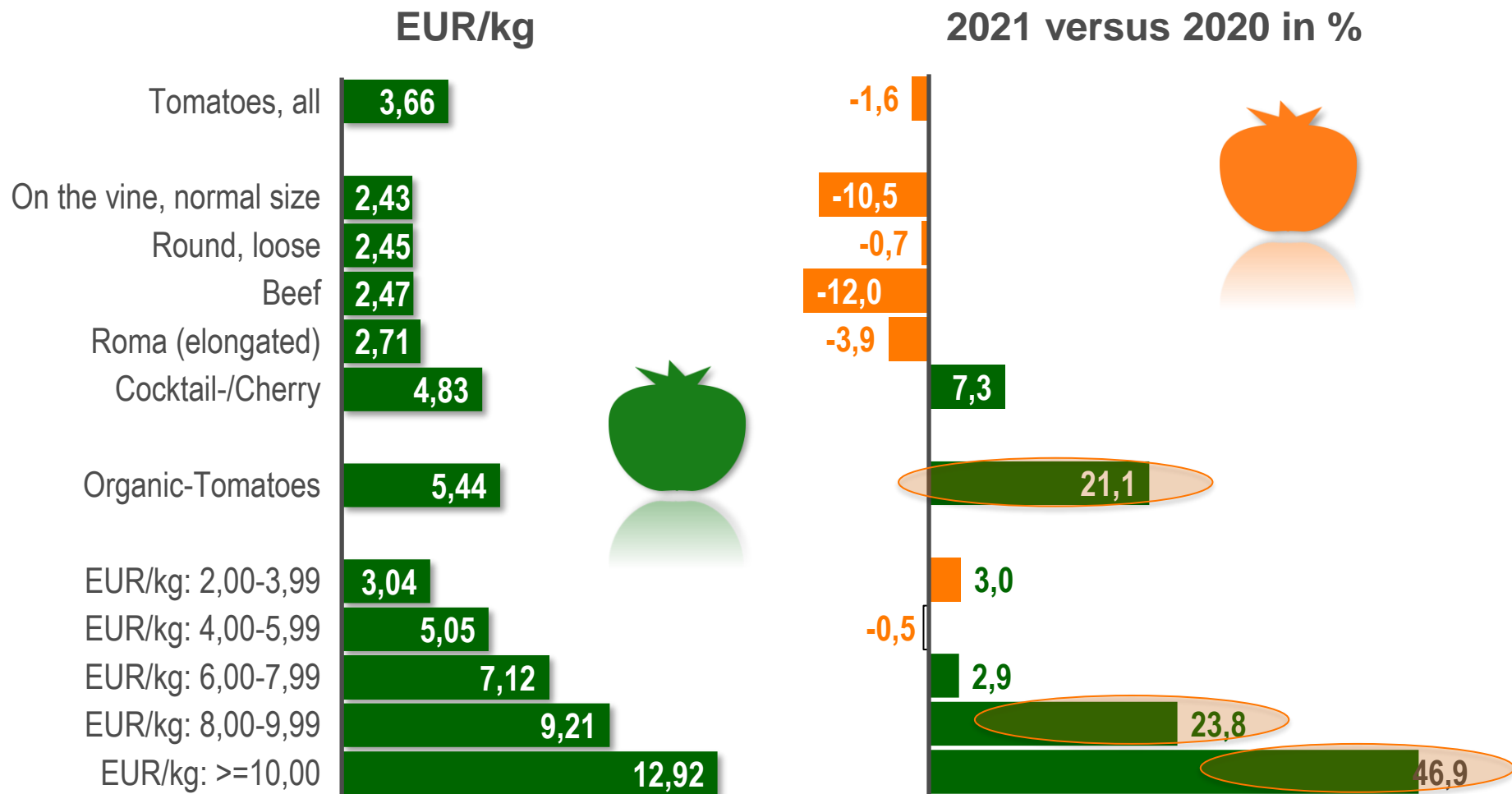
5,67



# Uptrading of Tomatoes in 2021...

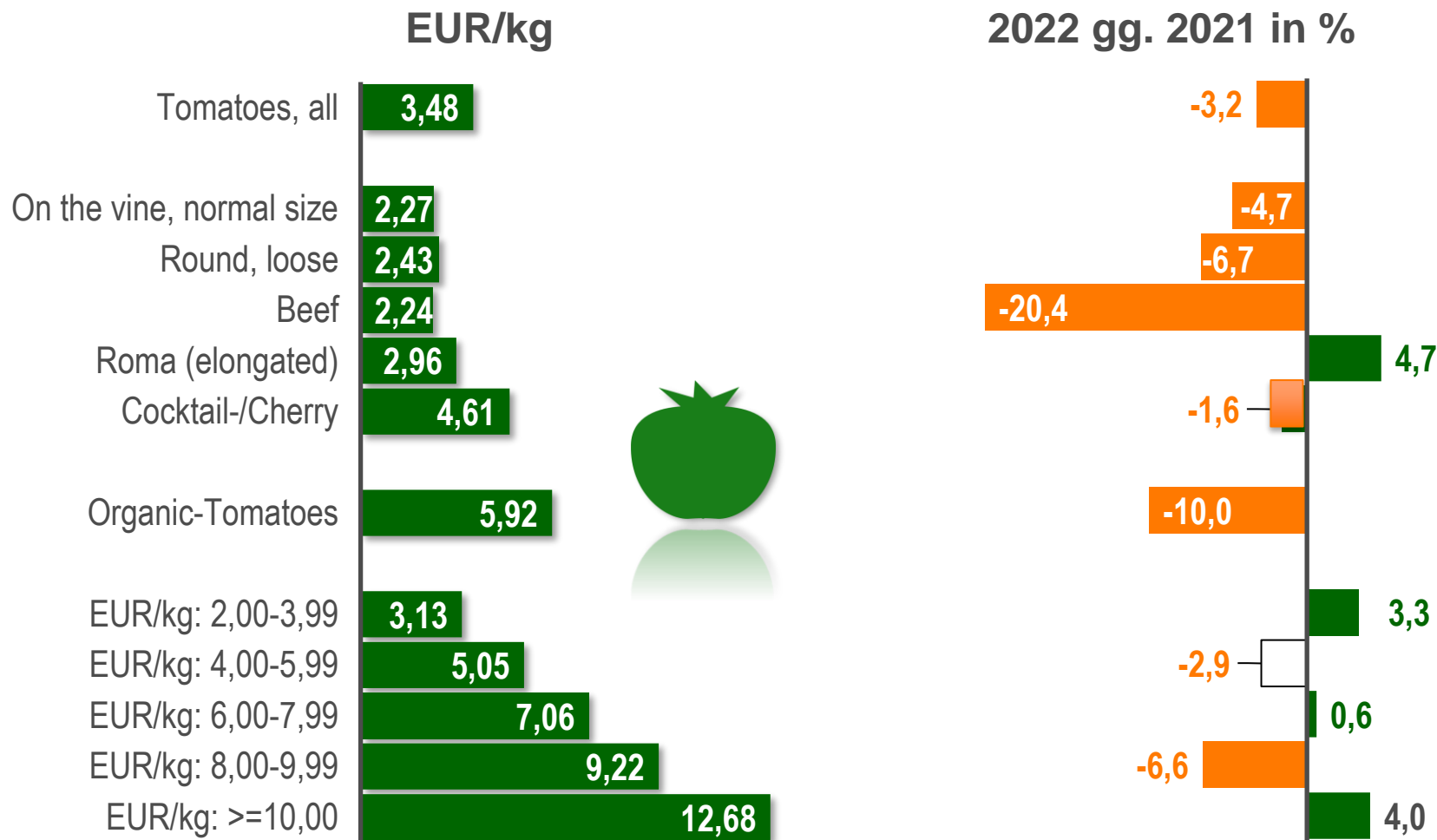
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Fresh tomatoes: Average price paid (EUR/kg) and change of quantity bought, by segment and price level in %, Germany



# Under conditons of inflation and insecurity...

Fresh tomatoes: Average price paid (EUR/kg) and change of quantity bought, by segement and Price level, **April – September**, in %, Germany

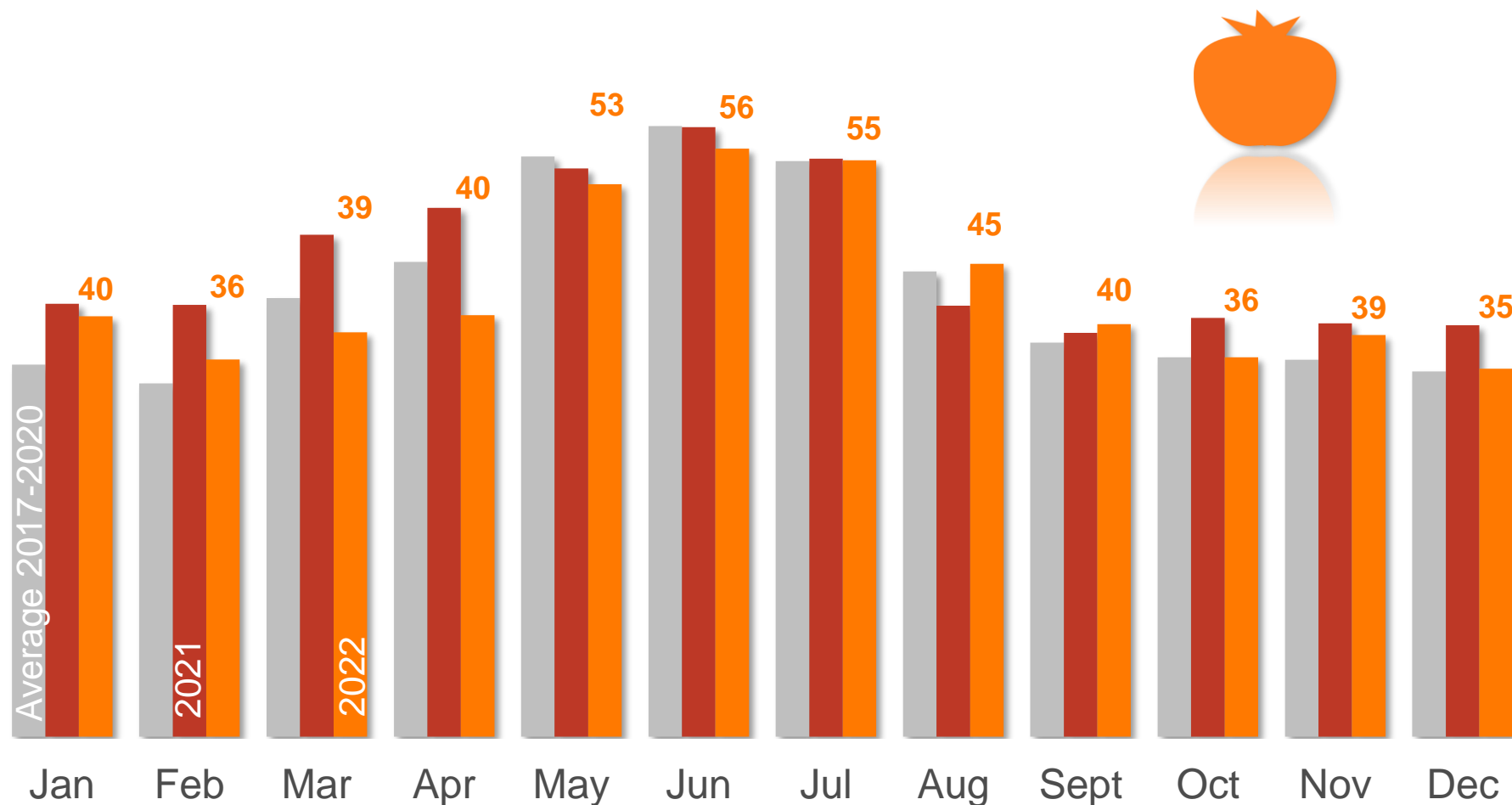




# Peak from May to July



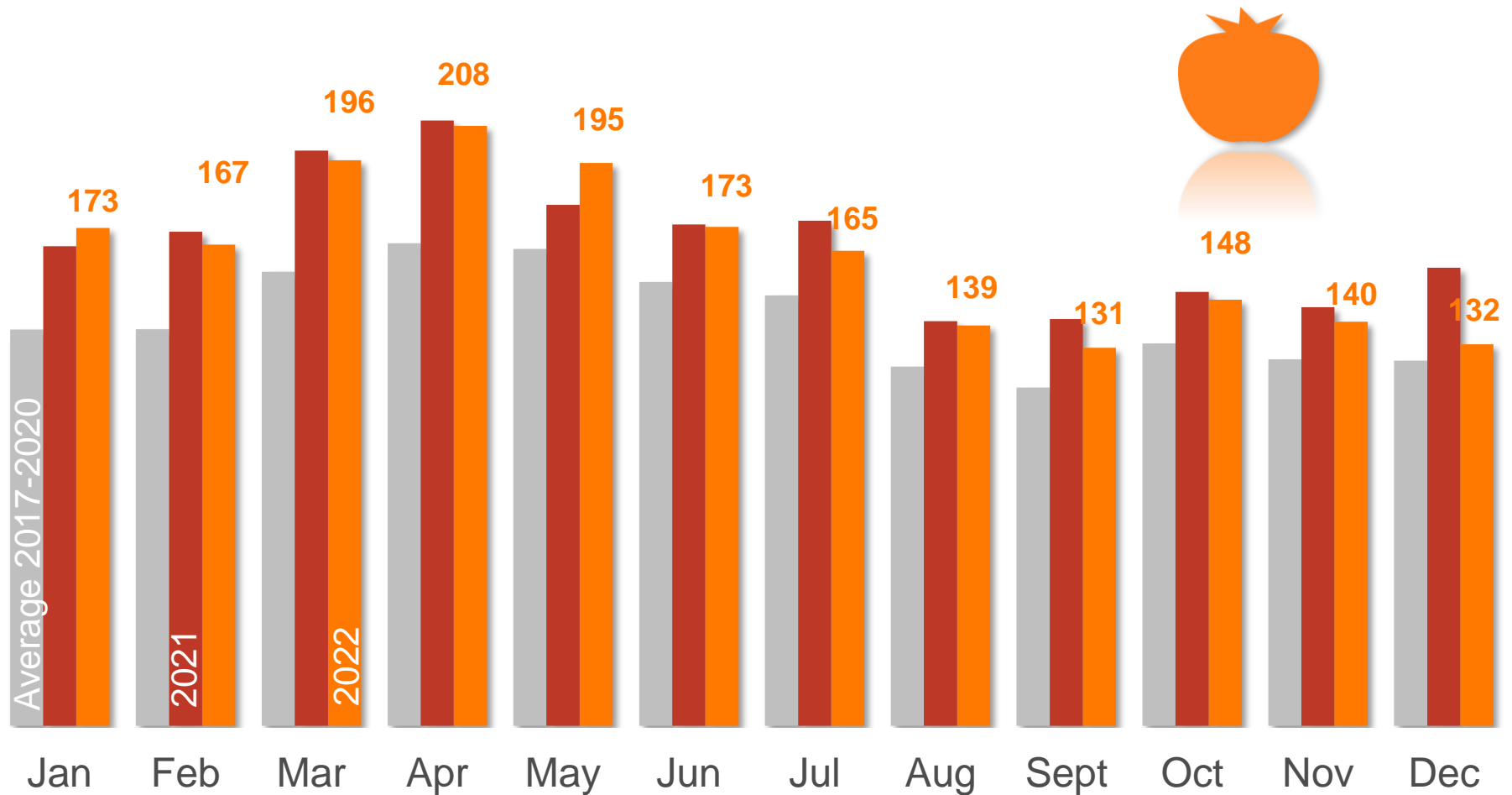
Quantities of fresh tomatoes bought by households by month, Germany, in 1,000 t



# Peak from March to May



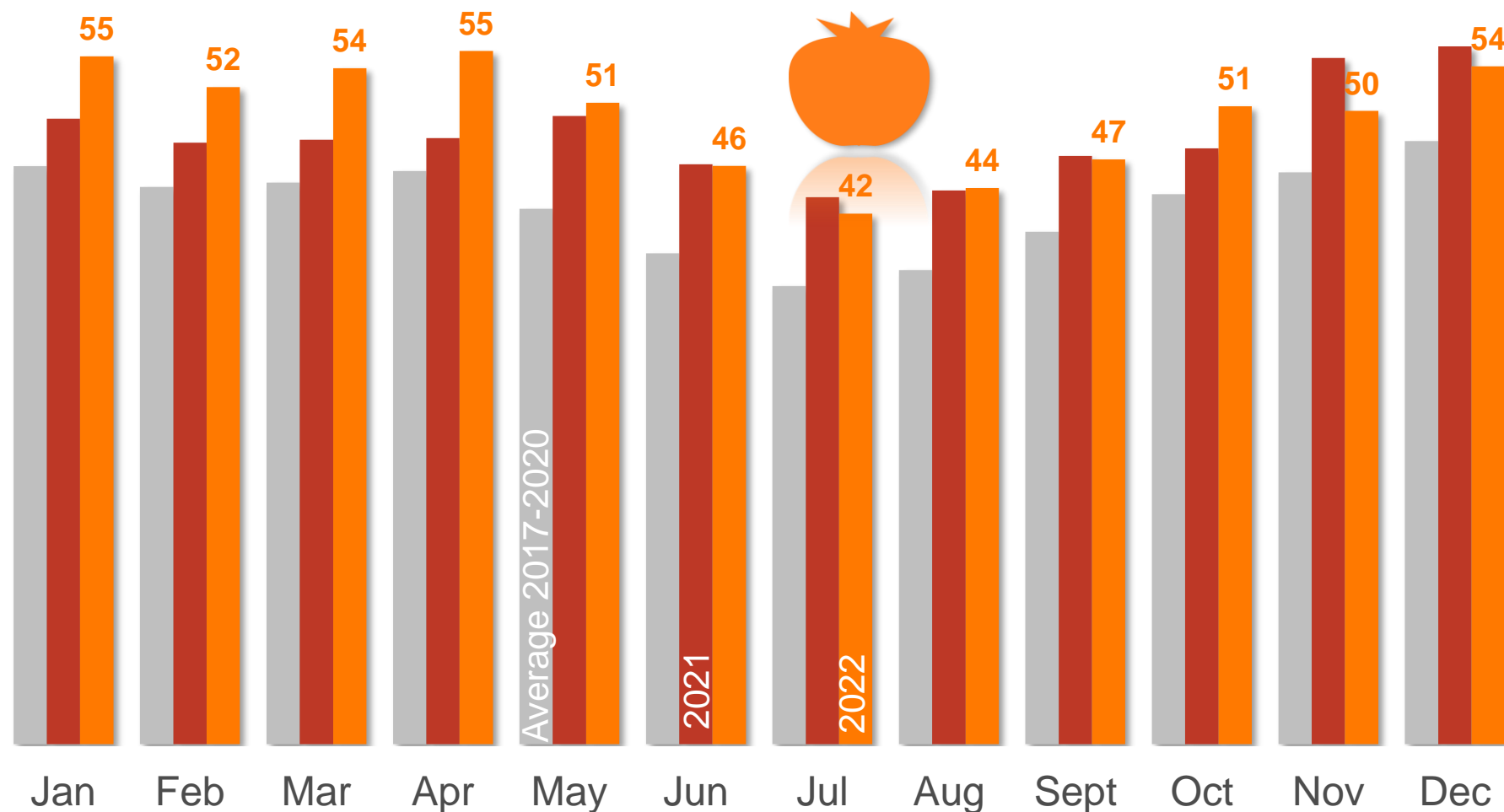
Consumer expenditures for fresh tomatoes by month, Germany, in Mio. EUR



# Share of cherry tomatoes in total



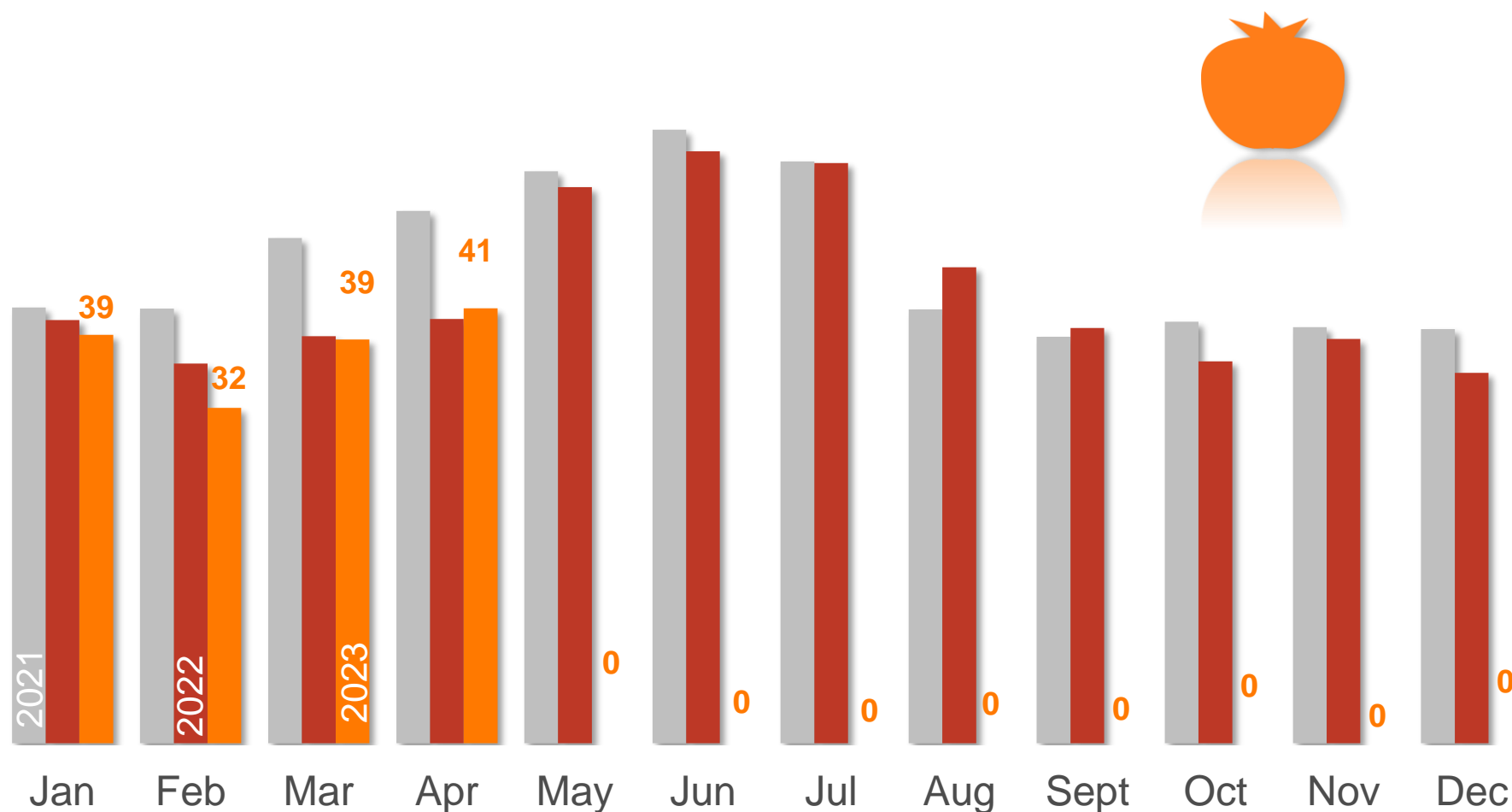
Share of cherry tomatoes in total tomato quantity bought by households in Germany, in %



# Low supply in February 2023

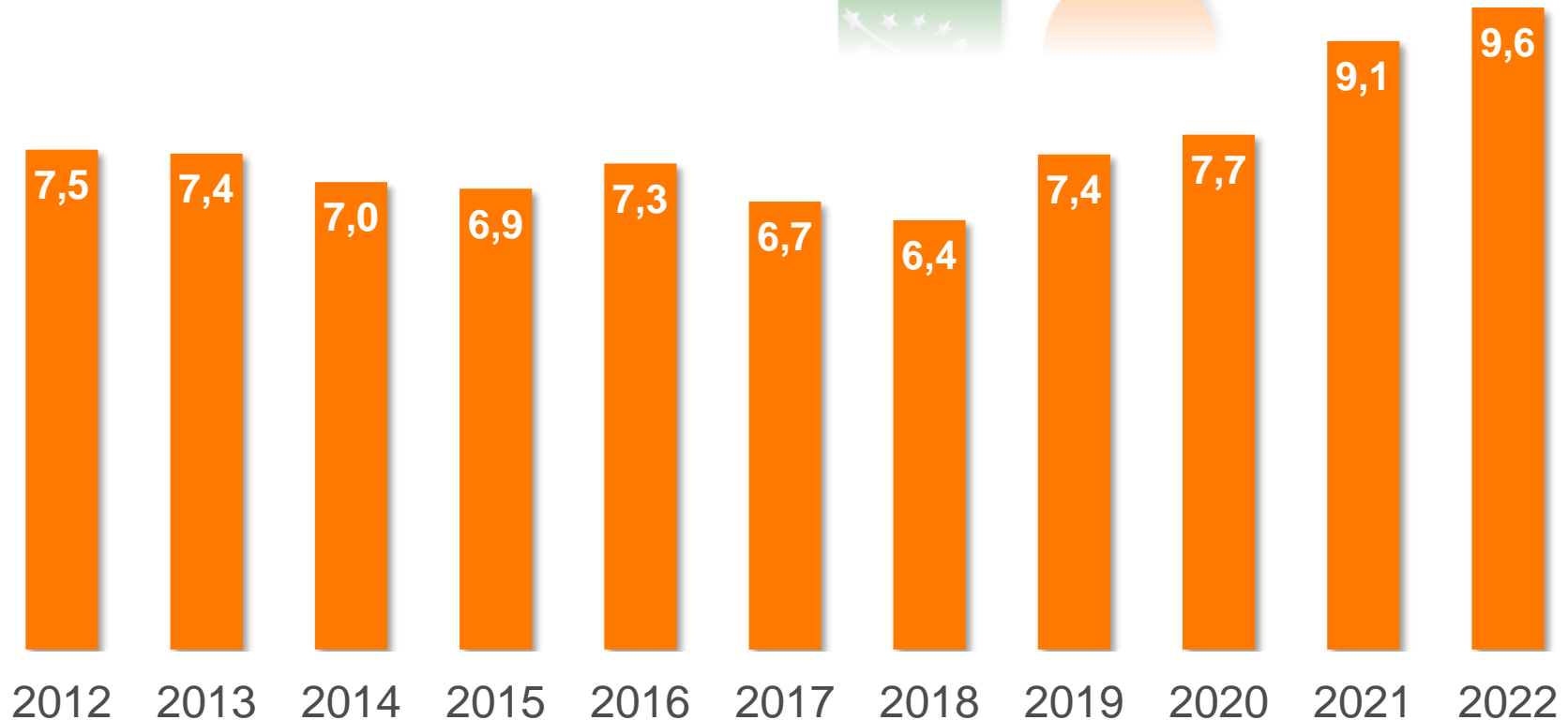
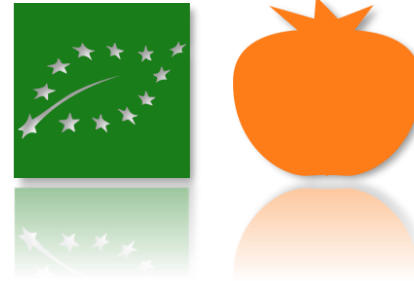


Quantities of fresh tomatoes bought by households by month, Germany, in 1,000 t



# Organic only recently growing faster

Share of organic tomatoes in consumer expenditure for fresh tomatoes in Germany, in %



# Organic Cherry tomatoes win shares



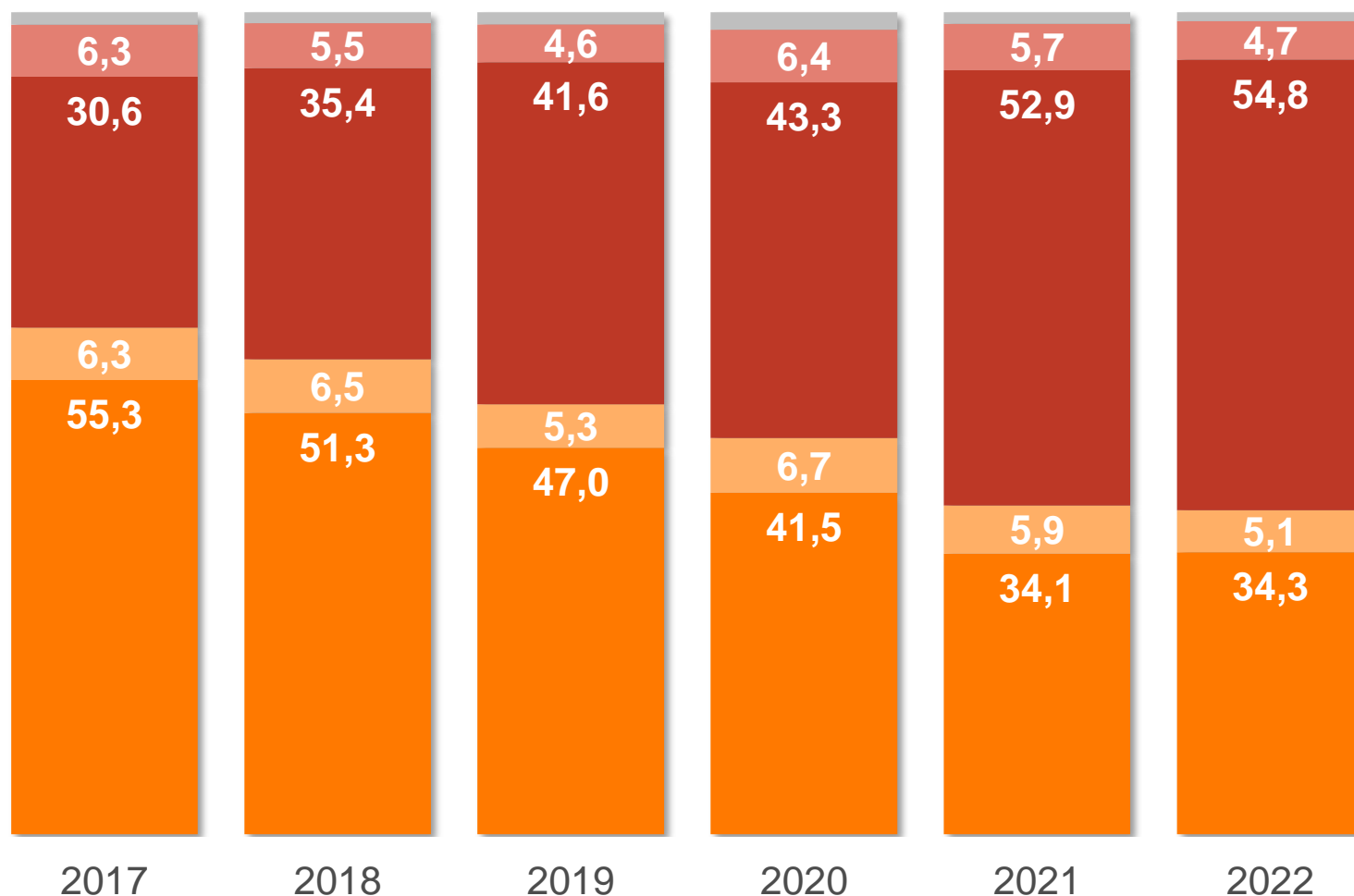
Share of segments in total consumer expenditure for fresh organic tomatoes, Germany, in % (Value)

other  
Elongated  
Cocktail-,  
Cherry-

Round/  
loose



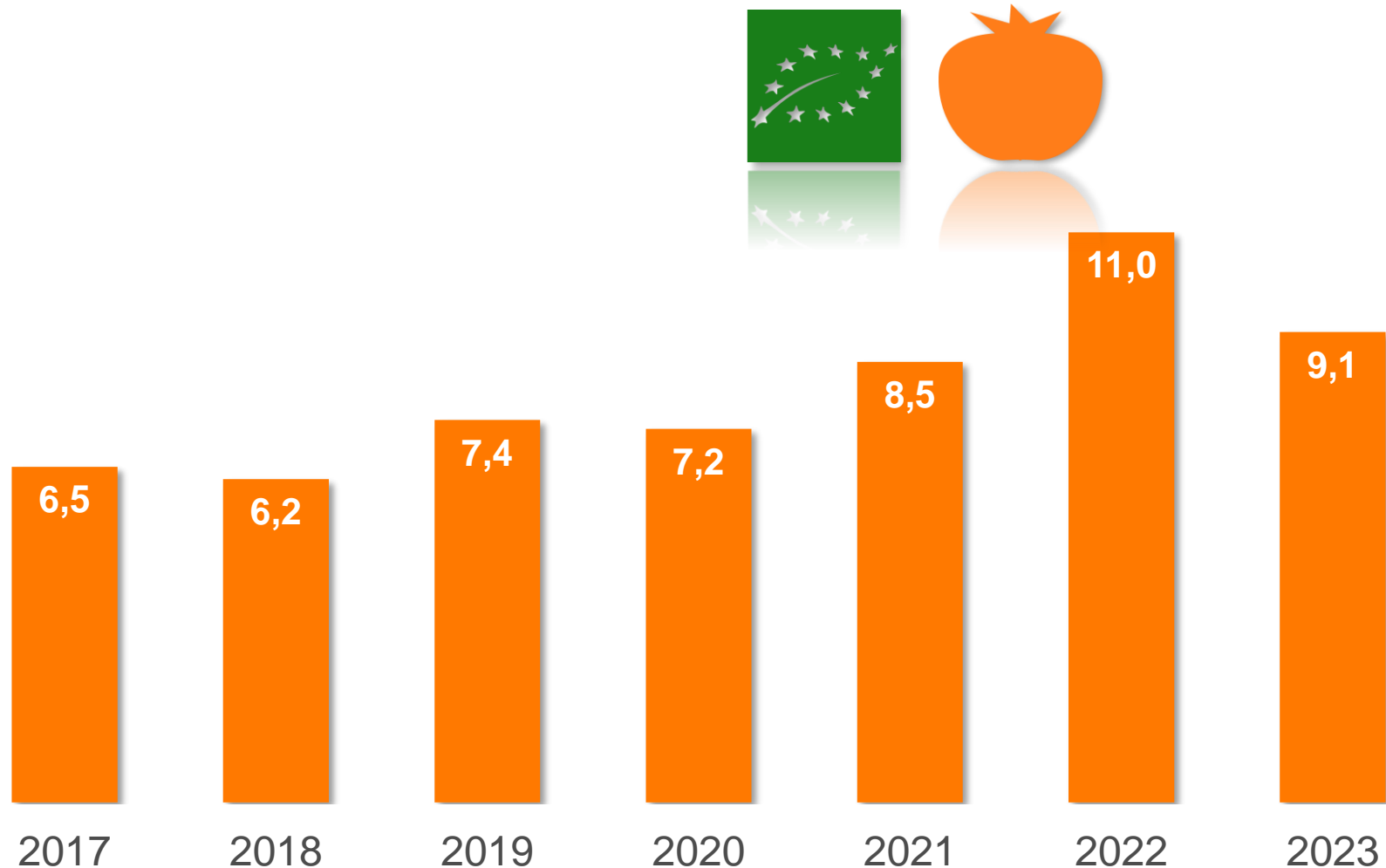
On the Vine,  
normal size



# In times of food inflation and uncertainty...



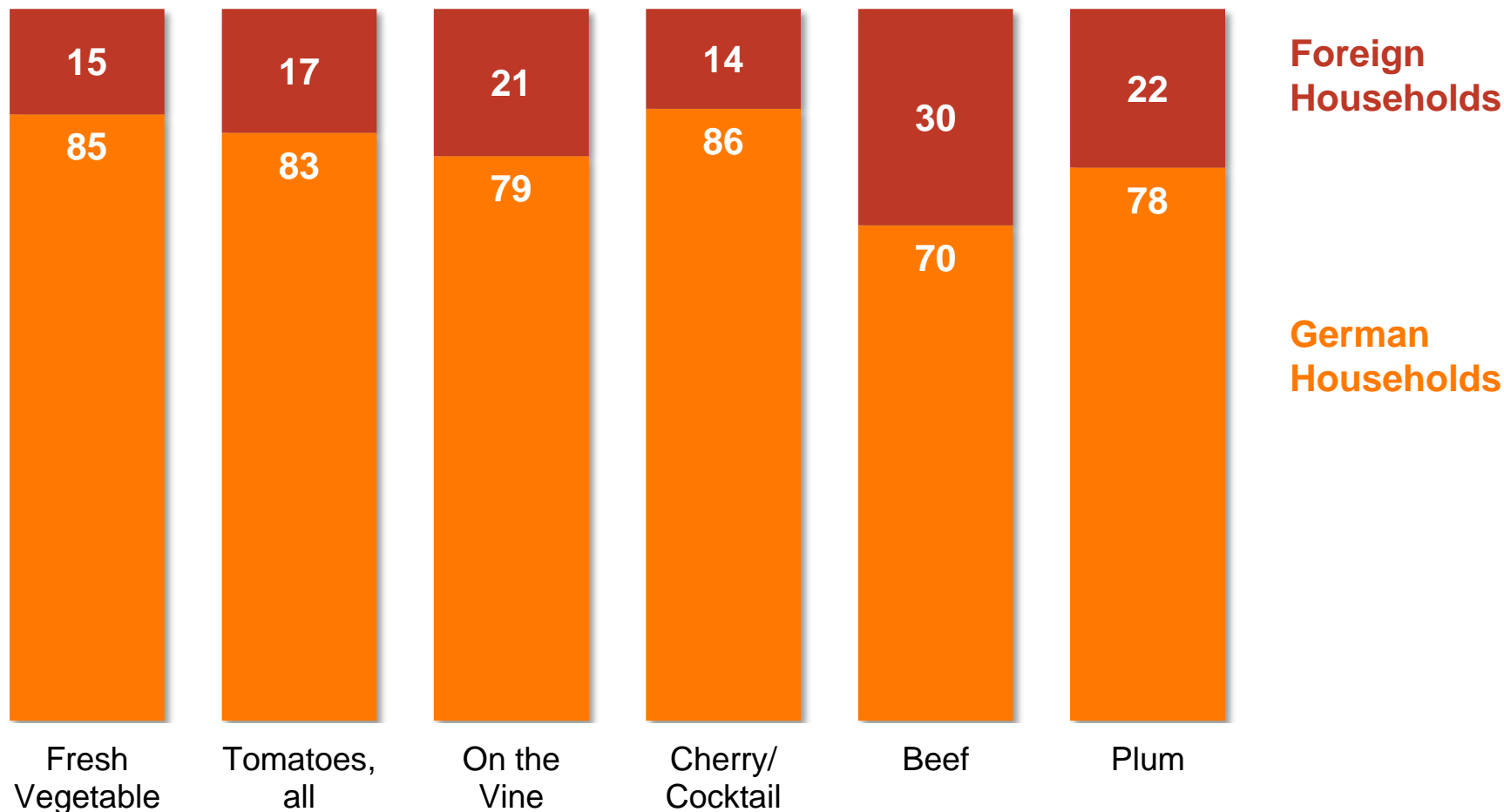
Share of organic tomatoes in consumer expenditure for fresh tomatoes in Germany, **January-April**, in %



# Beef Tomatoes in Foreign Households



Fresh Tomato quantity bought by nationality, Germany, 2022, in %





# Discount country

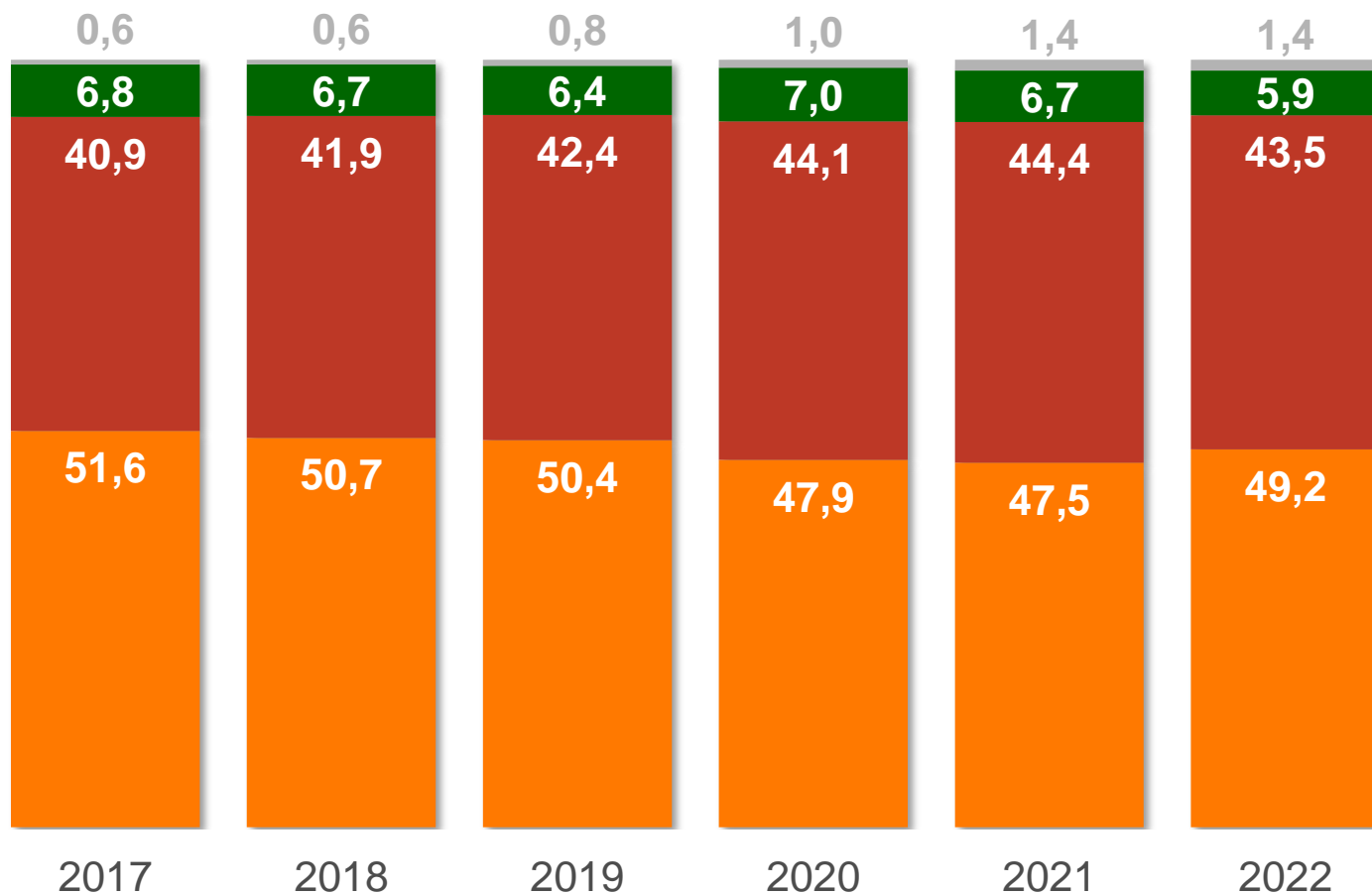
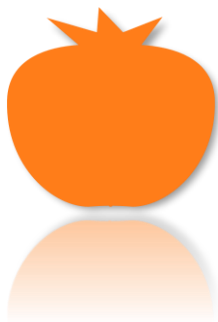


Expenditures for fresh Tomatoes by place of purchase, Germany, in %

Discount 1-4/23: 50,9 %

Online  
Greengrocer,  
Market,  
Producer  
Organic Shop  
Super-/  
Hypermarket

Discount



# Rising expenditures for snack tomatoes

Purchases of tomatoes by private households in the Netherlands



Quantities bought  
(kg/HH)



Consumer  
prices (EUR/kg)



Penetration (%)



2018

2020

2022

Tomatoes, all

2018

2020

2022

Snacktomatoes

# Mostly on the Vine

Purchases of tomatoes by private households by segment in Belgium

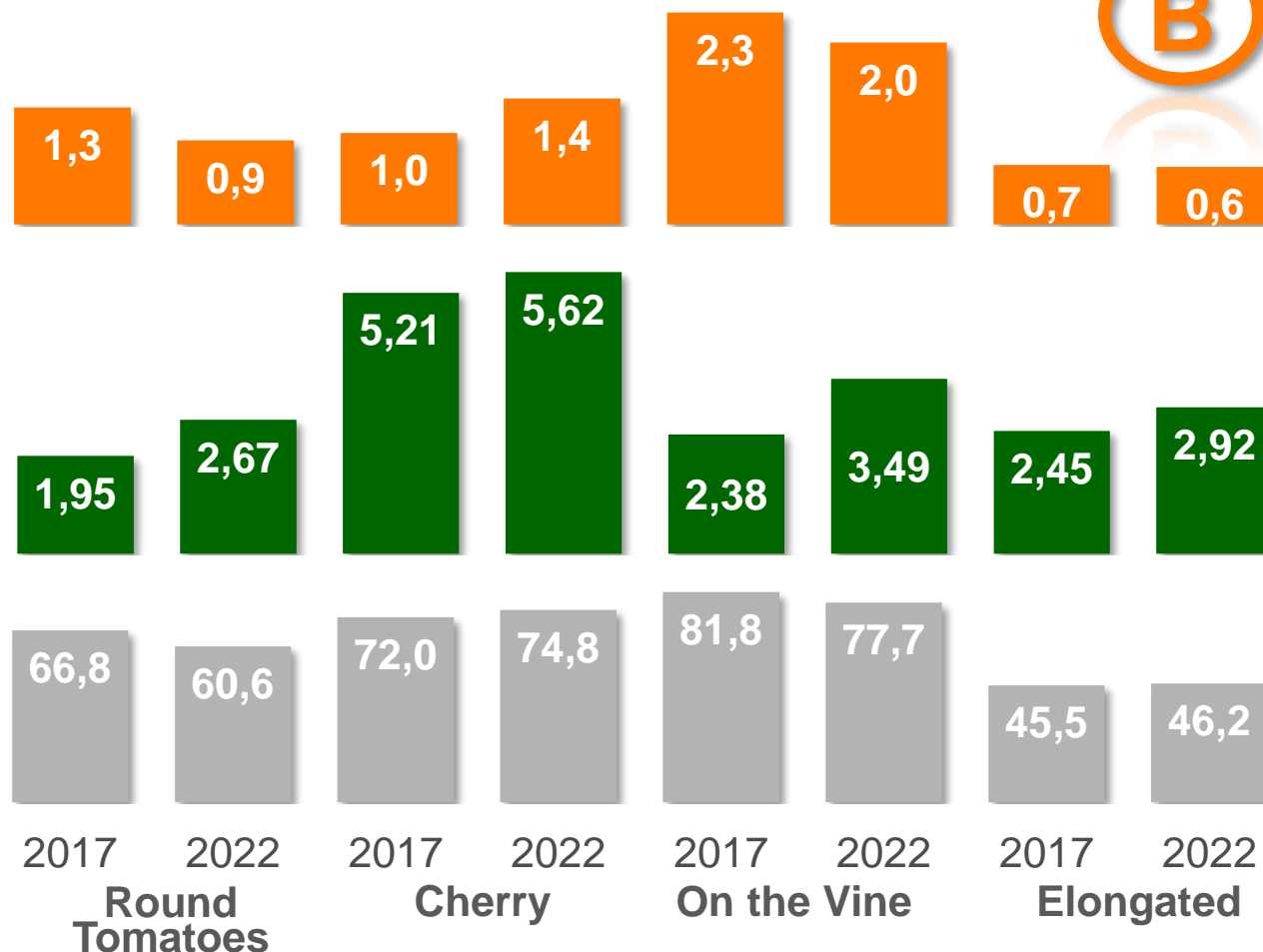


Quantities bought  
(kg/Capita)



Consumer  
Prices (EUR/kg)

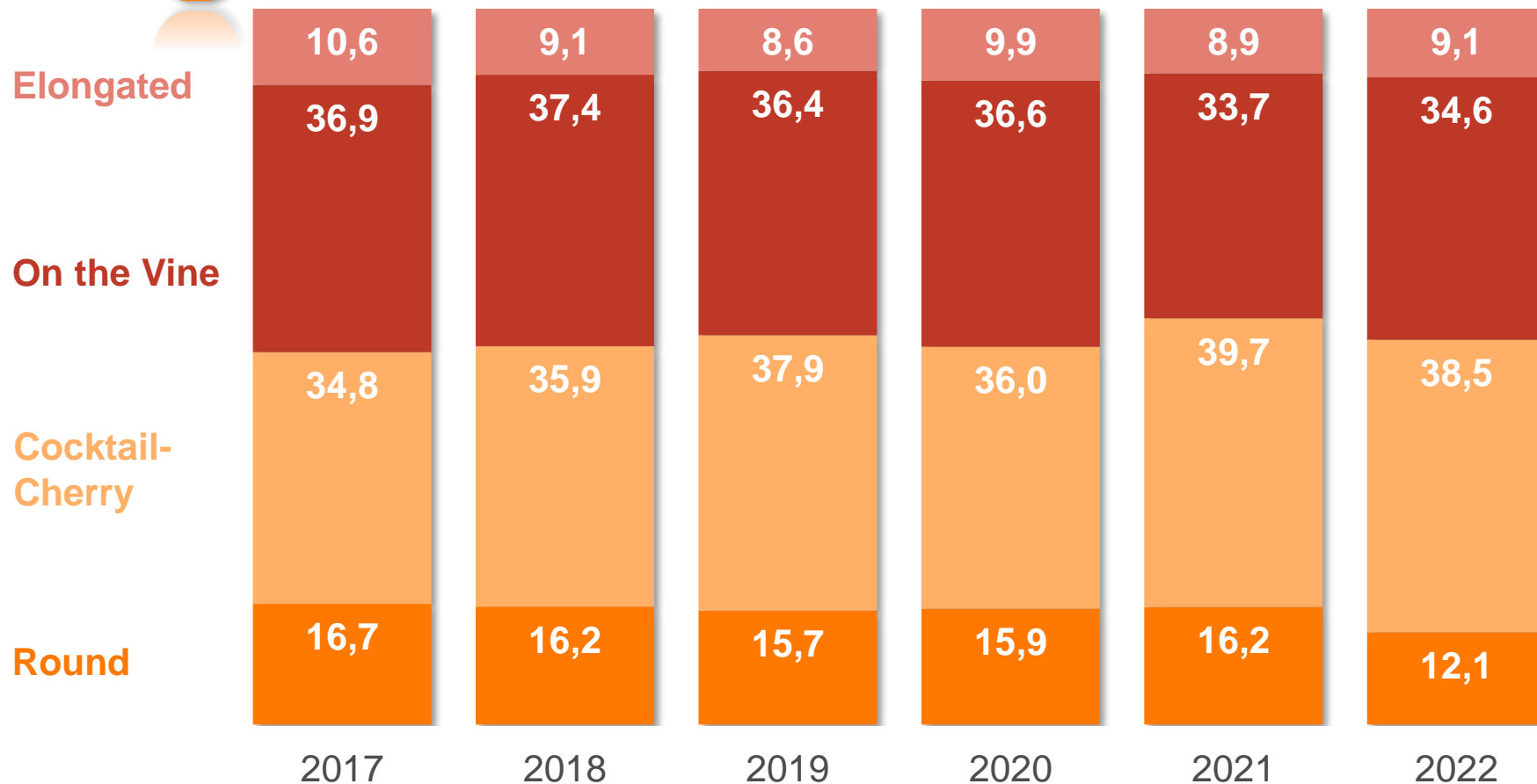
Penetration  
(%)



# Highest expenditures for small types

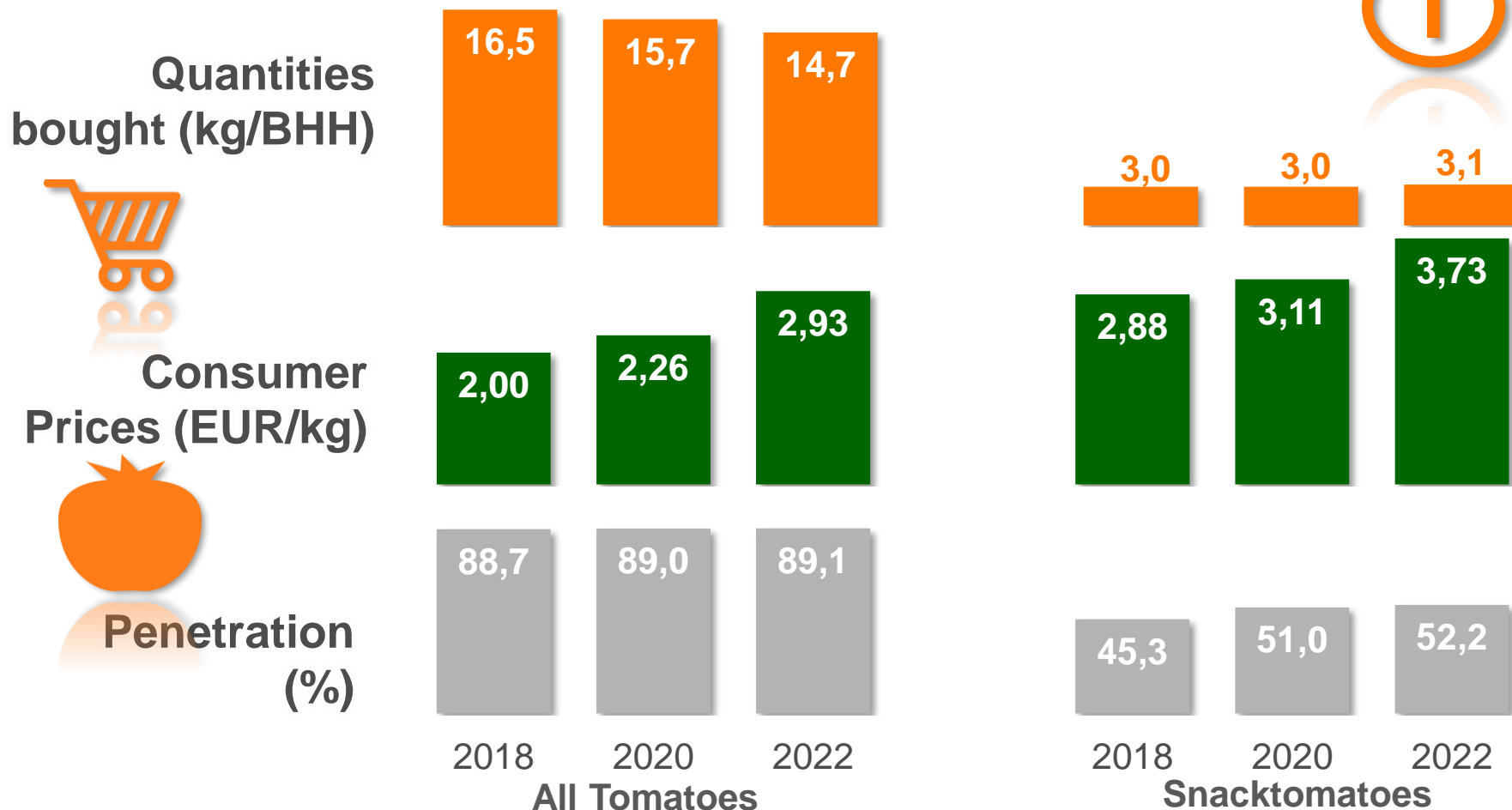


Segment share in total spendings for fresh tomatoes in Belgium, in %  
(share in expenditure)



# Low market share of Cherry/Cocktail

Purchases of tomatoes by Buying households by type, in Italy



# France – Household Purchasing indices for fresh Tomatoes

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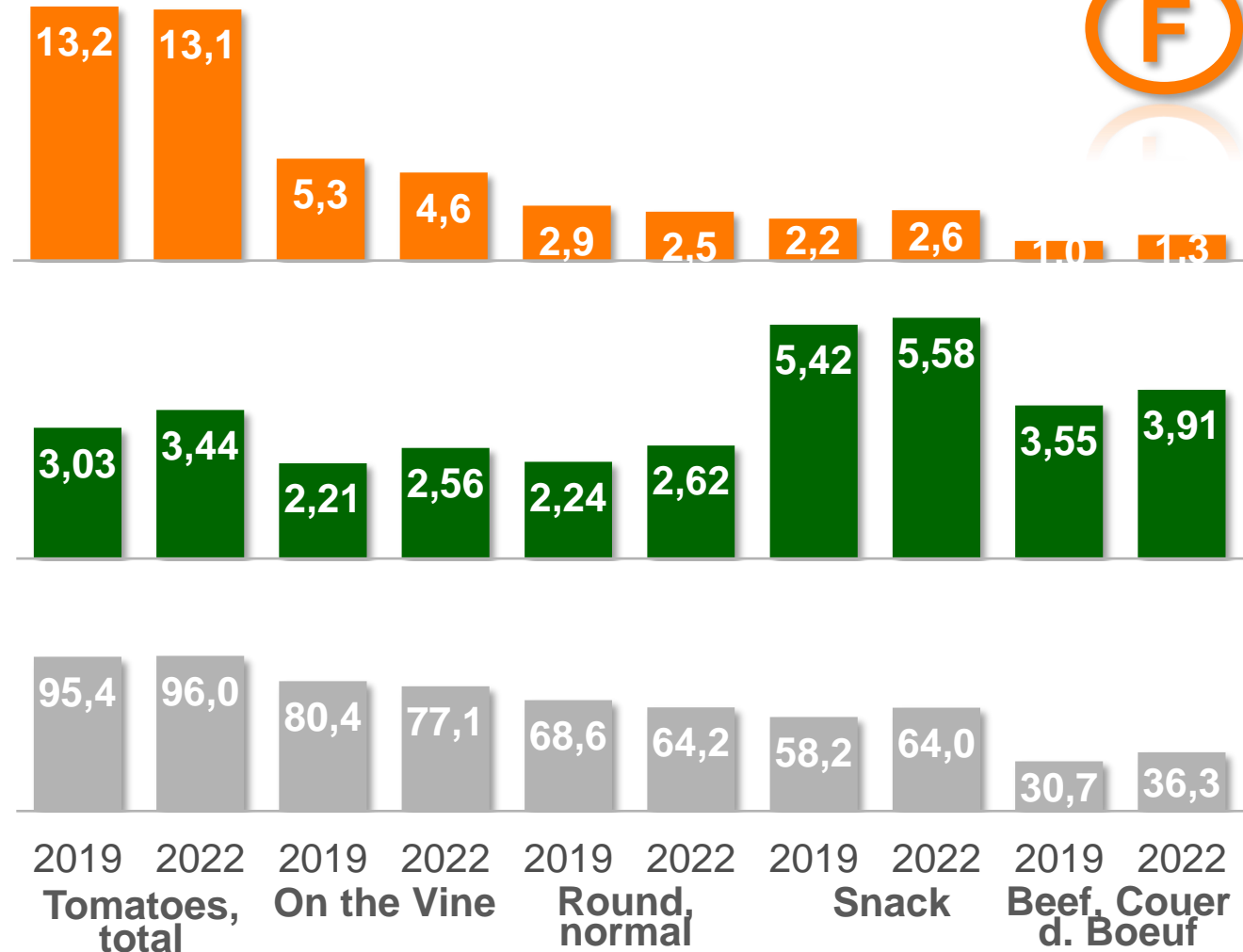
Quantities bought  
(kg/HH)



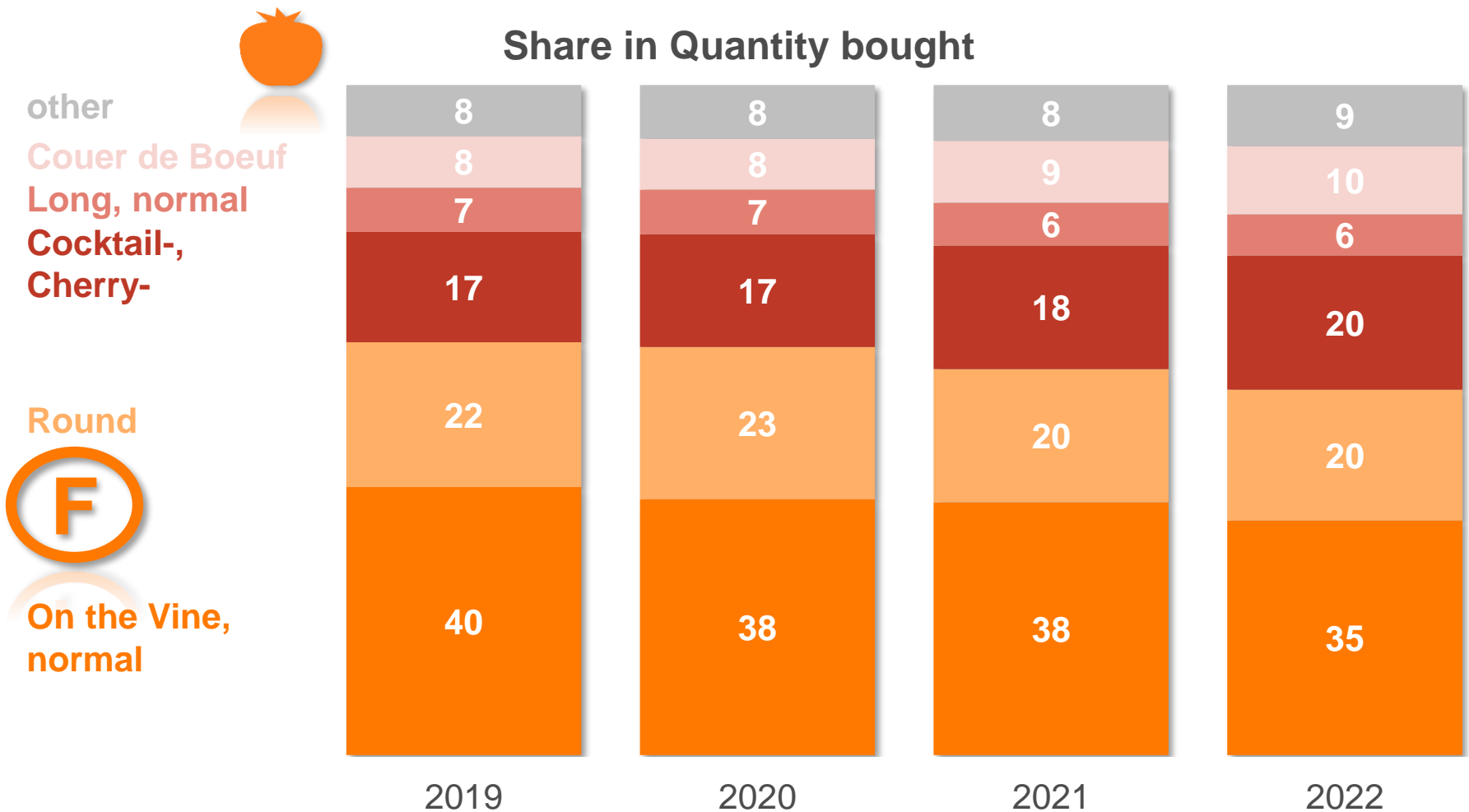
Price  
(EUR/kg)



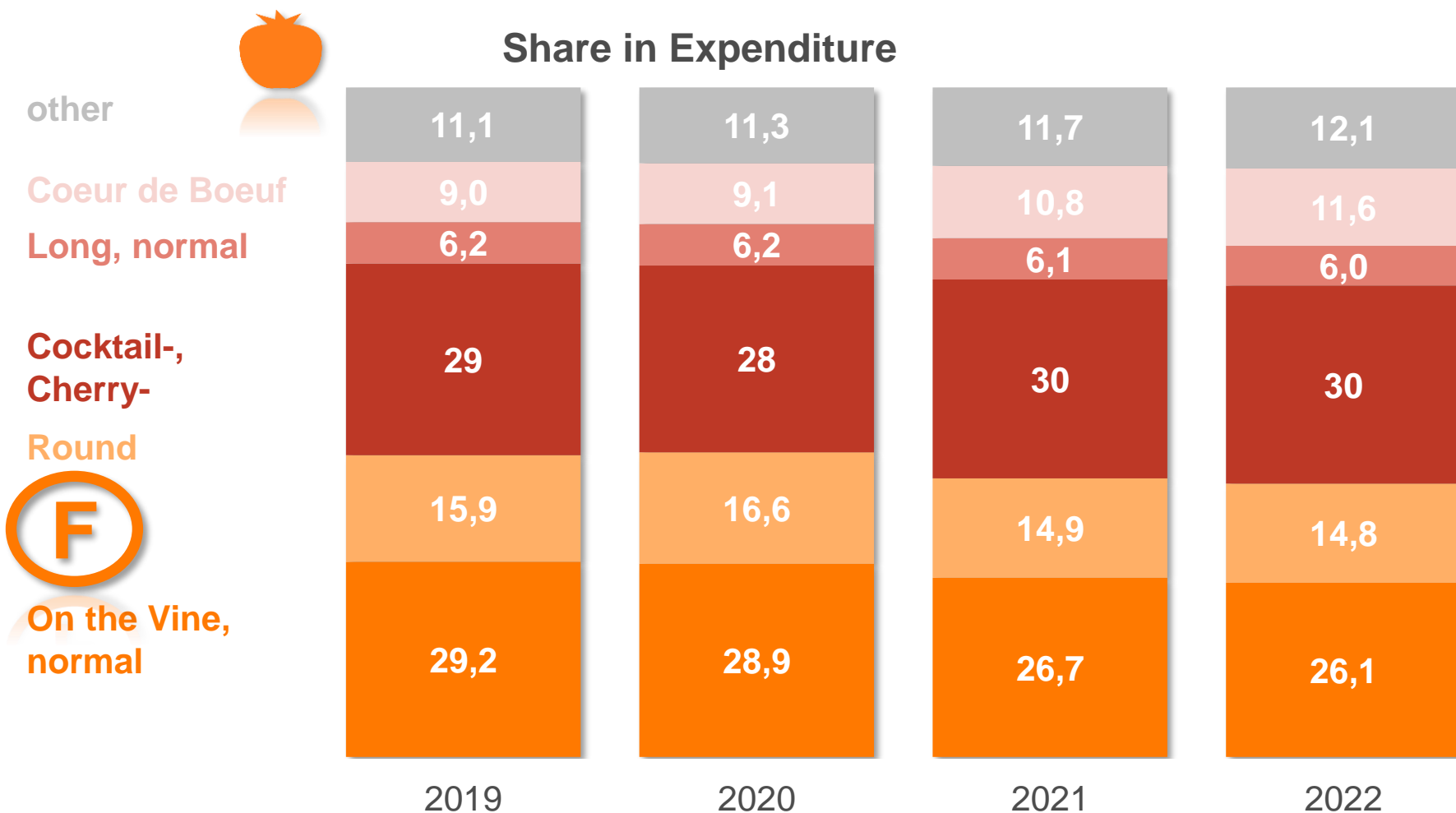
Penetration  
(%)



# France – Segment share in total fresh tomato quantity bought, in %



# France – Segment share in total spendings for fresh tomatoes, in %

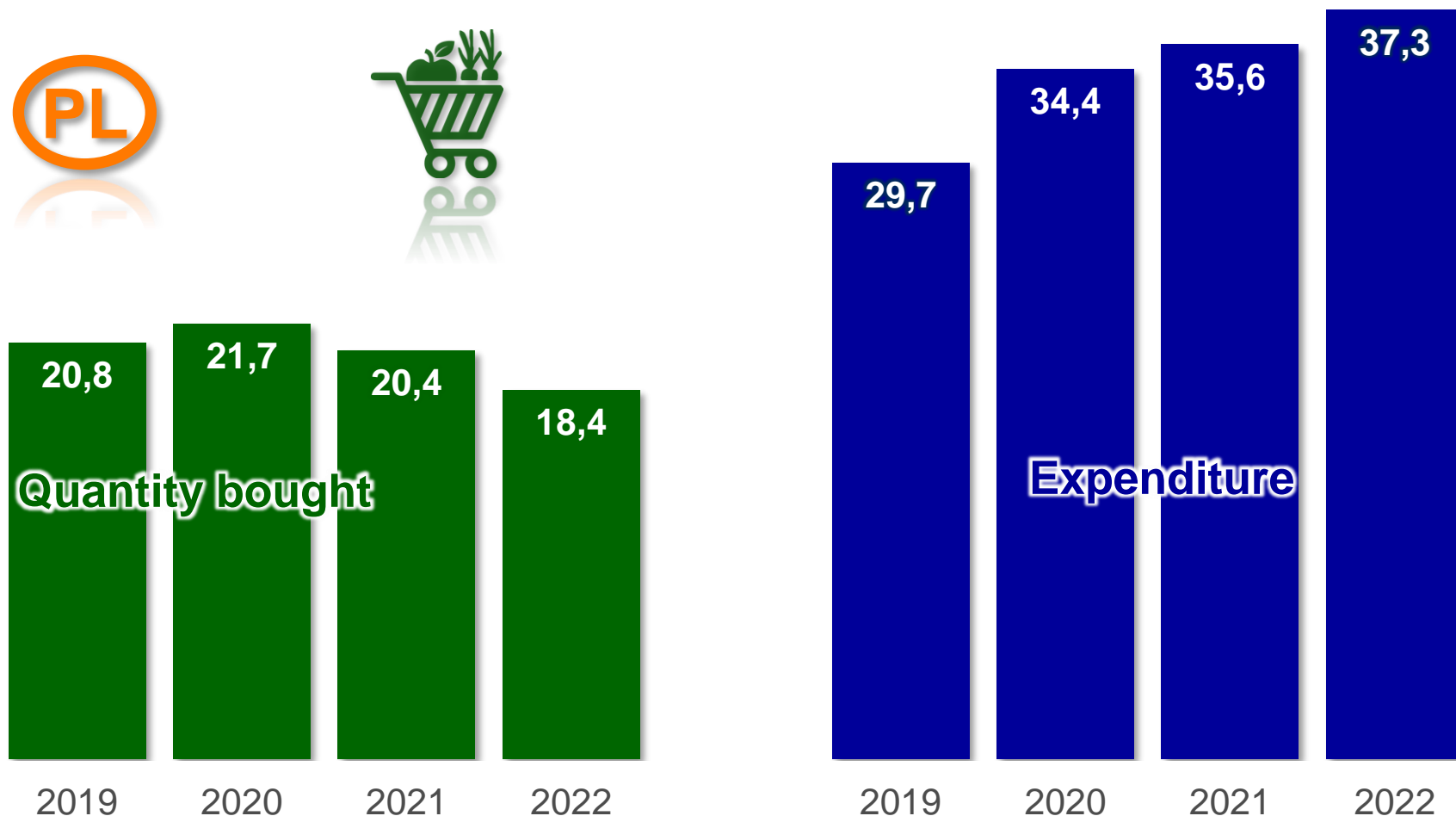




# Consumer price still low



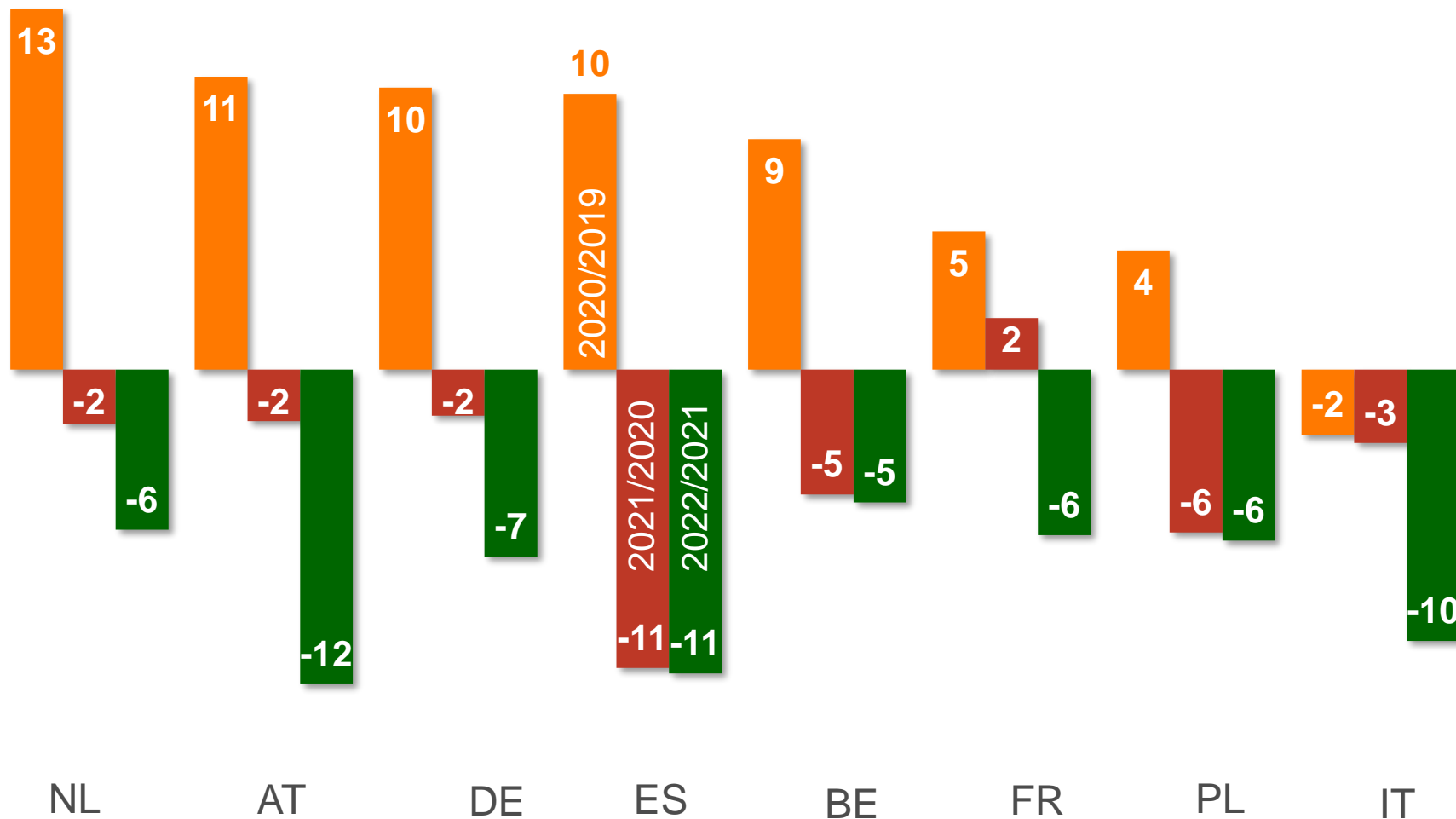
Fresh tomatoes bought by private households in kg/household, expenditures on fresh tomatoes (EUR/household), in Poland



# Decrease of quantities after high growth...



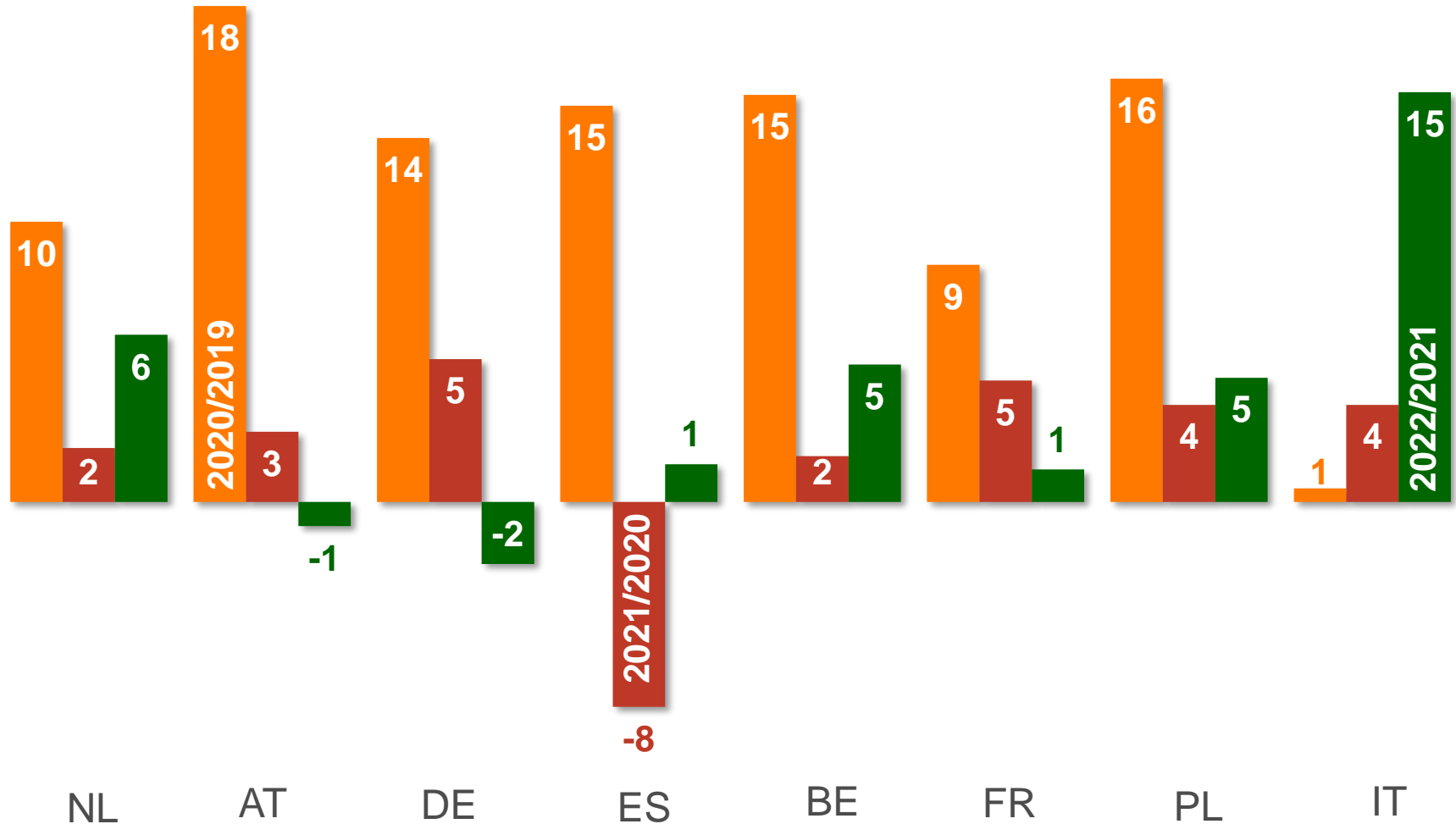
Change of tomato quantities bought 2020 vs 2019, 2021 vs 2020 and 2022 vs 2021, in %



## ... but not in expenditure

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Change of consumer expenditure for tomatoes 2020 vs 2019, 2021 vs 2020 and 2022 vs 2021, in %



# Concluding remarks



- (1) Like for all vegetables tomato retail sales were boosted by the pandemic due to the closure restaurants and canteens (decrease of out of home consumption)
- (2) Since a lot of leisure activities were impossible and people had more time (home office, short time work) cooking was in fashion and people were willing to spend more for food and to spend more time for shopping.
- (3) In the second half of 2021, purchasing behavior returned to normal; with Russia's attack on Ukraine, purchasing behavior changed once again.
- (4) After April 2022 consumers became more aware of the price and the general uncertainty caused them to hold back on consumption.
- (5) Due to the price increase of inputs and wages prices for tomatoes also increased from 2021 onwards on all market levels, also on consumer level
- (6) The big trends like the preference for Cocktail-/Cherrytomatoes or for regional produce continue, but consumers are not willing to spend as much money for this as before.

Please feel free to ask questions. Thank you very much for your attention.