

**TOMATO MARKET OBSERVATION POLAND    JANUARY -  
MAY 2022/2023  
JUNE 19, 2023            GORZÓW WLKP**

CEO GRUPA MULARSKI S.A

President of the Tomato and Cucumber Producers  
Association in Poland



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1. Cost and Production situation

-

Energy price increase + 18%

Labor costs increase + 12%

Packaging costs decrease - 23%

- 20-25% decrease in production - later planting, energy savings,
  - 34% light me year on year

No change in the production profile

70% Pink Tomato
15% Classic Tomato
15% Special Tomato

INFLATION -17.5%

Maciej Mularski  
CEO GRUPA MULARSKI S.A

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3. Price increase 2022/2023  
week 12-23

Pink Tomato +32 %

Koktail +40%

Cherry +9 %

Strawberry +4 %

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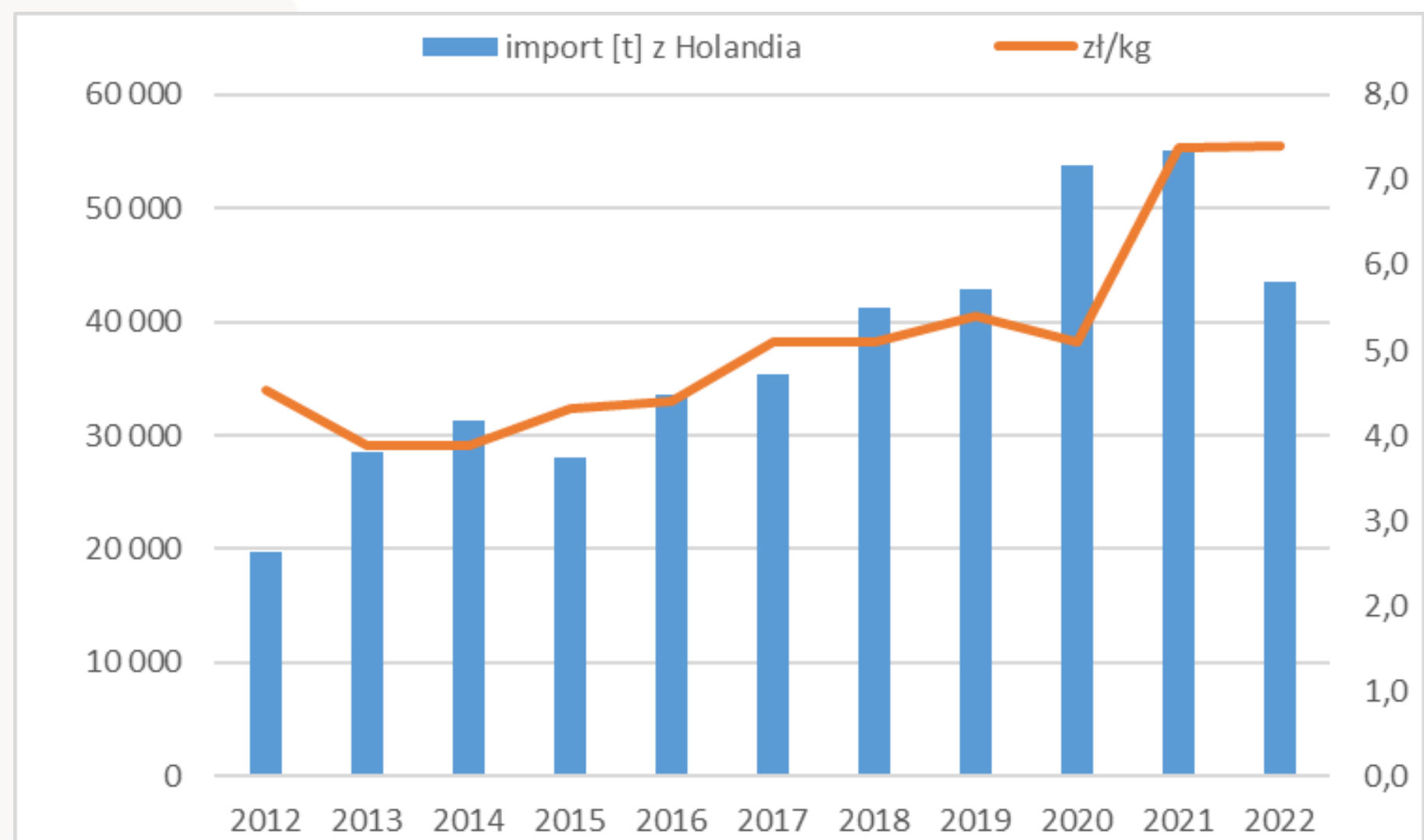
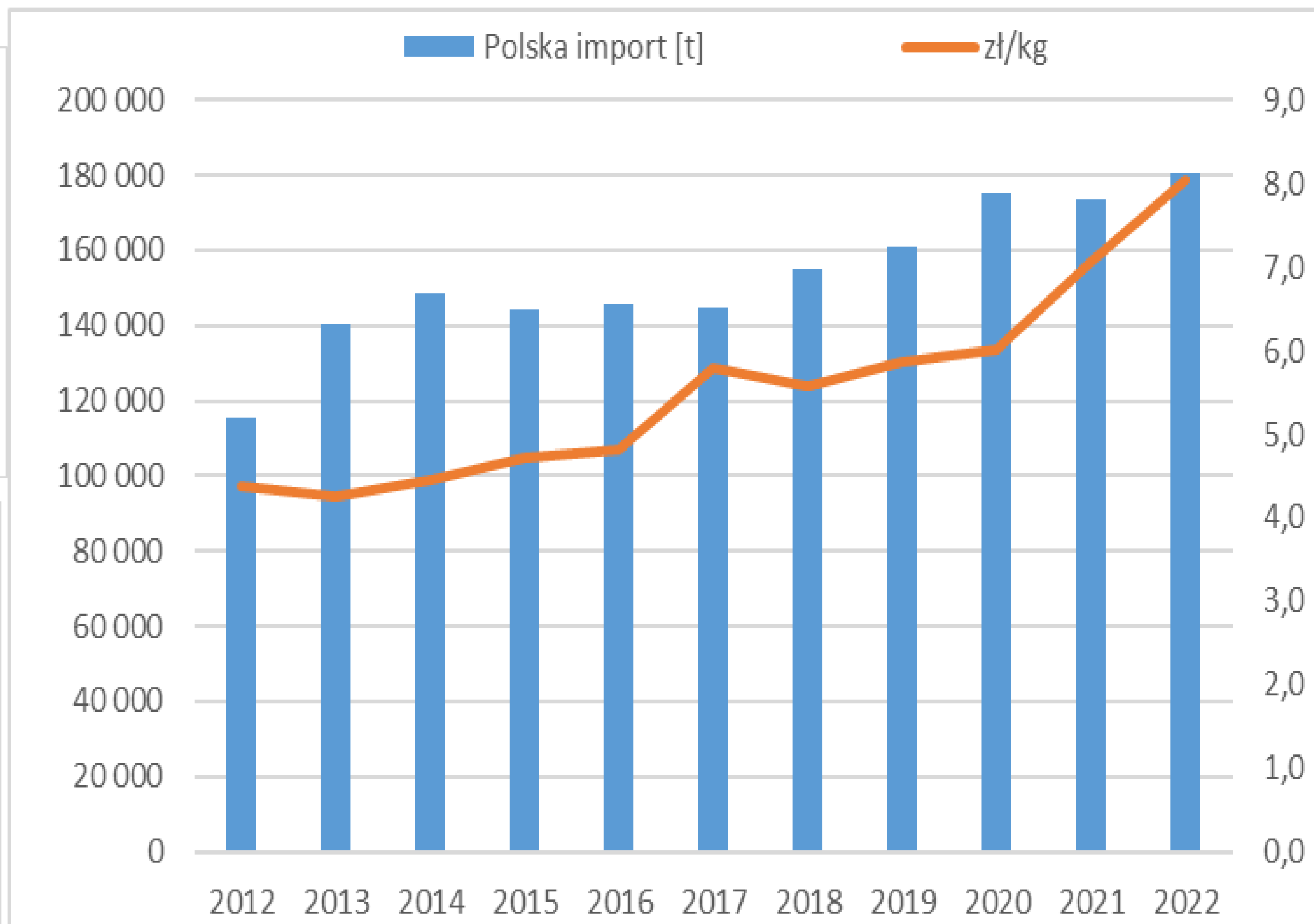
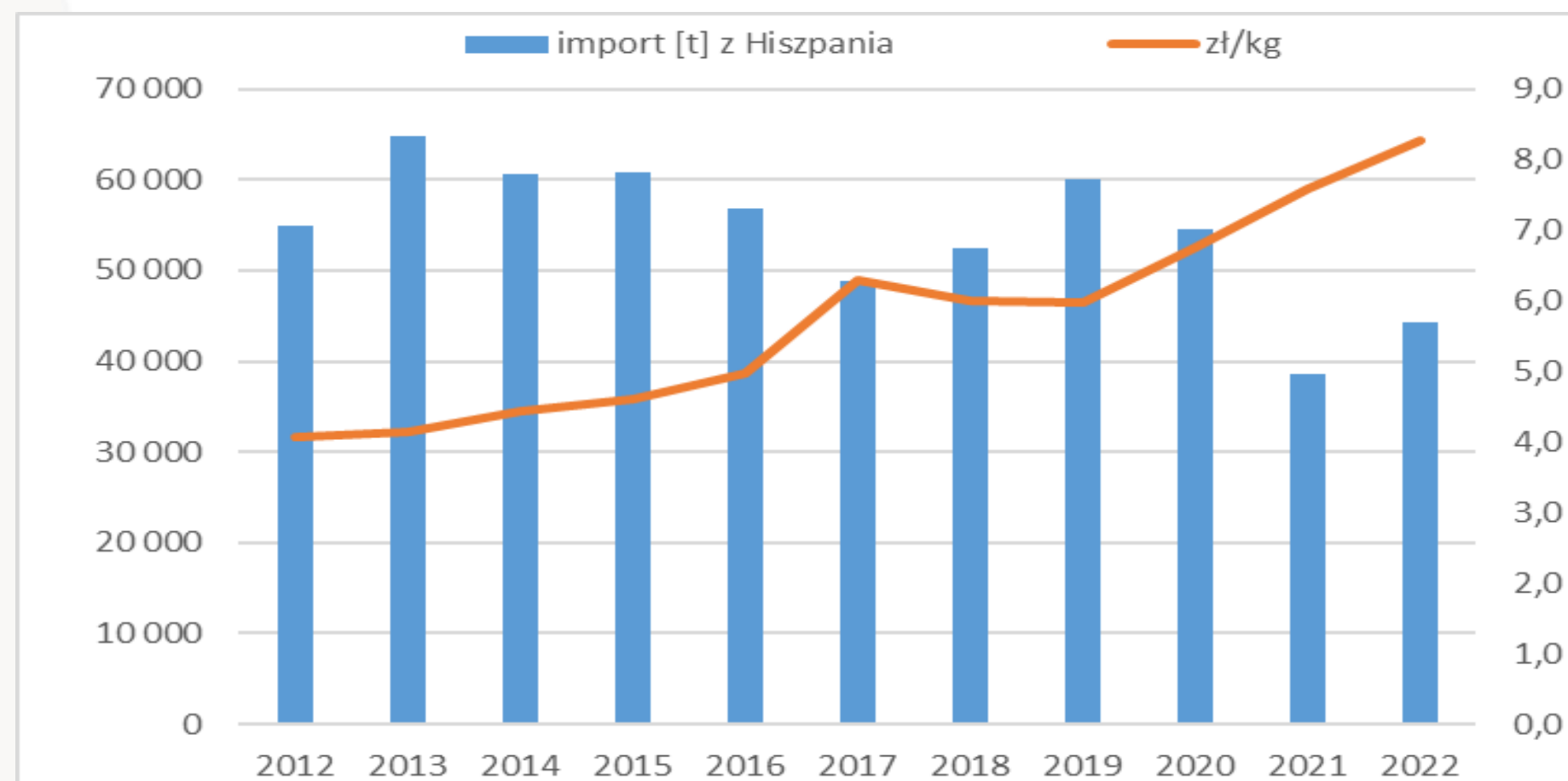
President of the Tomato and Cucumber Producers Association in Poland



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### 3. IMPORT TO POLAND



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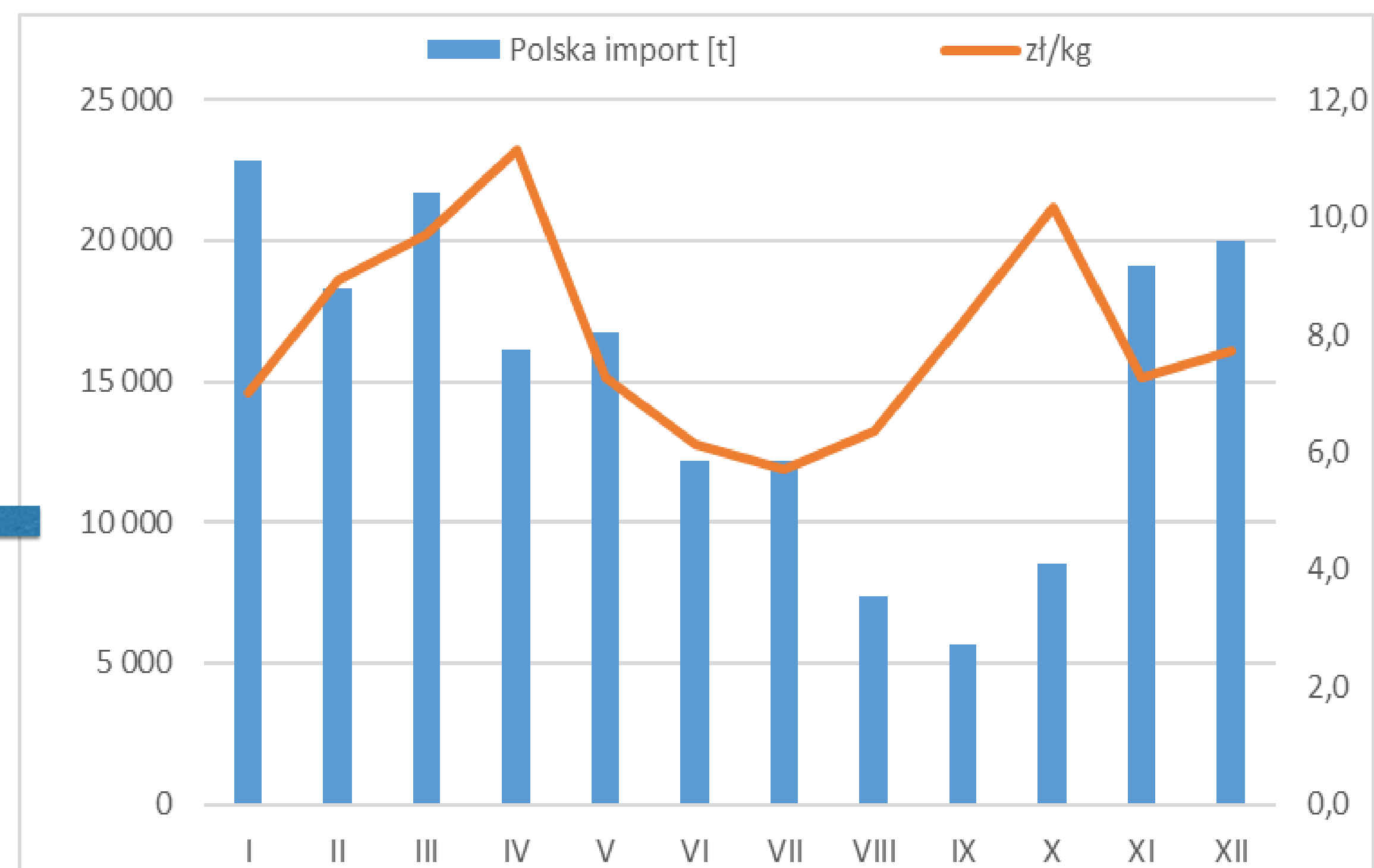
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## 3. IMPORT TO POLAND

### Kraje odpowiedzialne za 99% importu w 2022

Kraj	import [t]	% importu	cena zł/kg
Hiszpania	44 295	24,5%	8,26
Holandia	43 488	24,1%	7,40
Maroko	36 026	19,9%	7,30
Niemcy	26 318	14,6%	11,20
Turcja	21 901	12,1%	6,06
Francja	2 990	1,7%	9,69
Belgia	1 683	0,9%	4,64
Włochy	1 283	0,7%	12,12
Macedonia	749	0,4%	8,55



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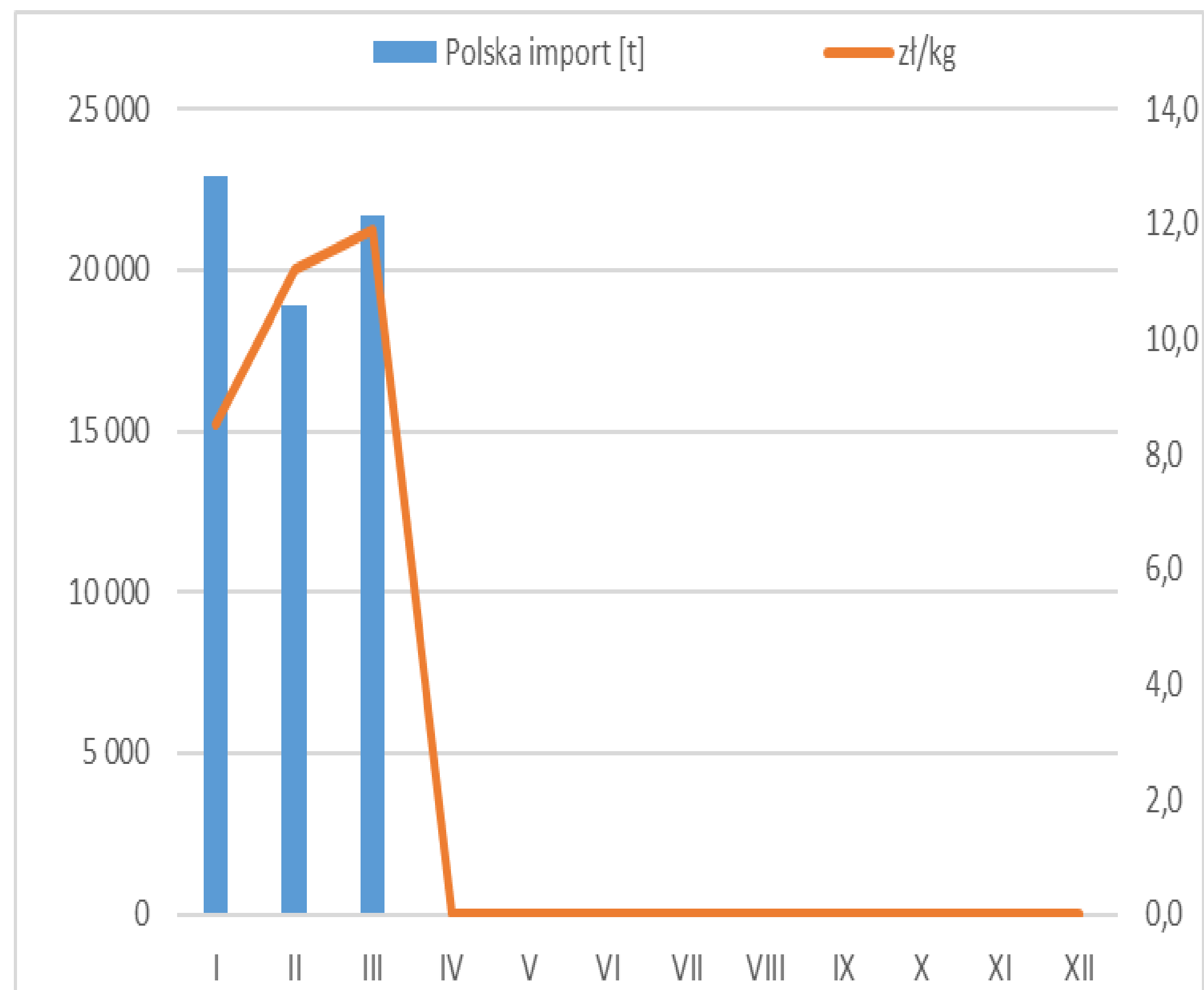
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### 3. IMPORT TO POLAND

Kraje odpowiedzialne za 99,9% importu w 2023 (I-III)			
Kraj	import [t]	% importu	cena zł/kg
Turcja	20 730	32,7%	7,11
Hiszpania	17 135	27,0%	10,43
Maroko	11 570	18,2%	10,19
Niemcy	6 930	10,9%	17,59
Holandia	3 094	4,9%	14,85
Włochy	1 415	2,2%	15,95
Francja	879	1,4%	13,58
Macedonia	625	1,0%	10,37
Azerbejdżan	377	0,6%	6,43
Senegal	282	0,4%	16,12
Rumunia	164	0,3%	9,61
Ukraina	80	0,1%	18,61
Portugalia	60	0,1%	10,10
Tunezja	29	0,05%	8,90
Czechy	19	0,03%	6,07
Egipt	18	0,03%	13,22
Belgia	13	0,02%	10,34
Węgry	11	0,02%	7,39
Grecja	11	0,02%	3,16



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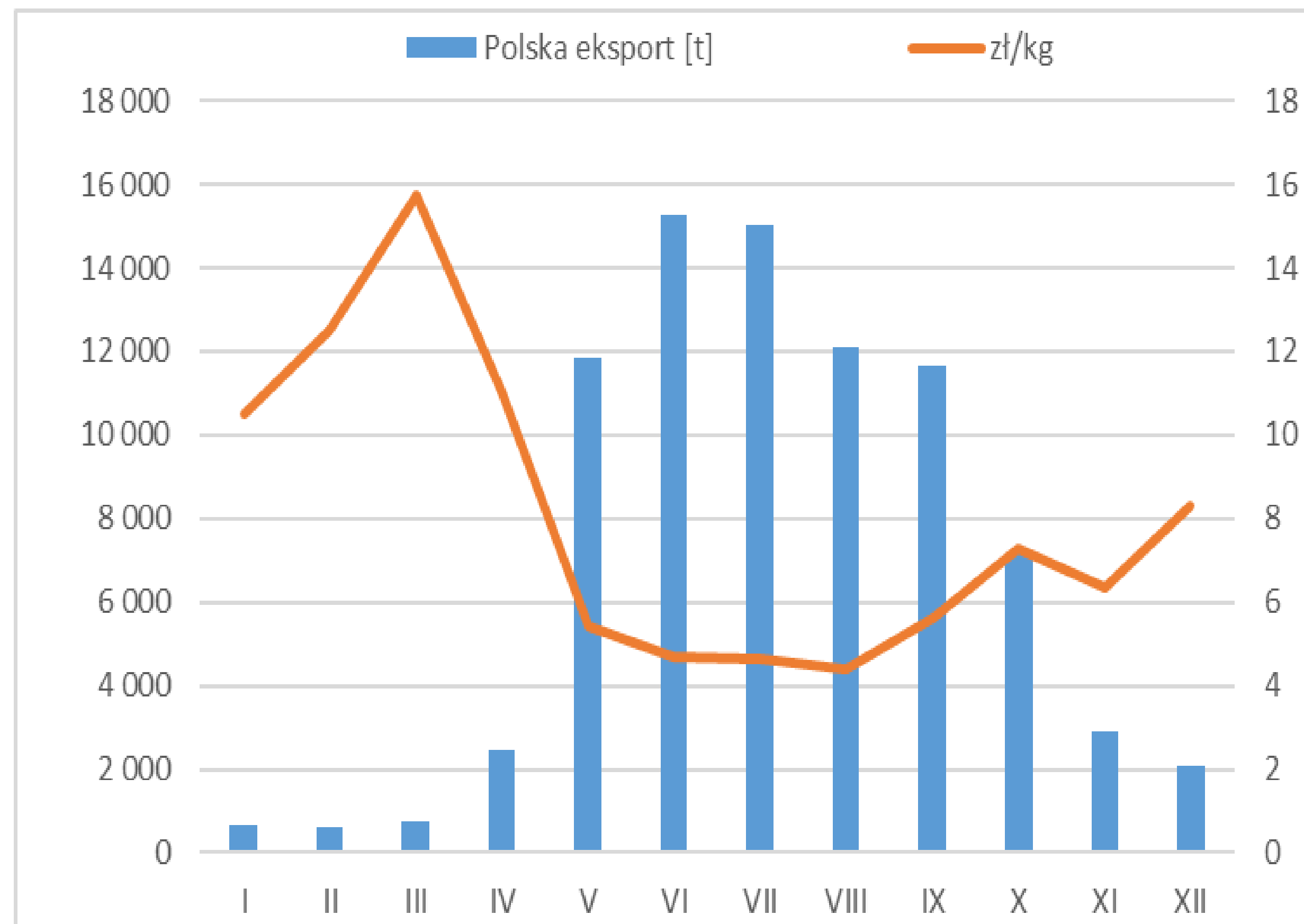


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### EXPORT FROM POLAND

Kraje odpowiedzialne za 78% eksportu w 2022			
Kraj	export [t]	% eksportu	cena zł/kg
Ukraina	22 202	26,9%	4,28
Niemcy	13 297	16,1%	7,95
Wielka Brytania	11 559	14,0%	7,15
Francja	5 570	6,8%	5,10
Łotwa	3 838	4,7%	6,21
Czechy	3 753	4,6%	5,01
Włochy	3 740	4,5%	5,33



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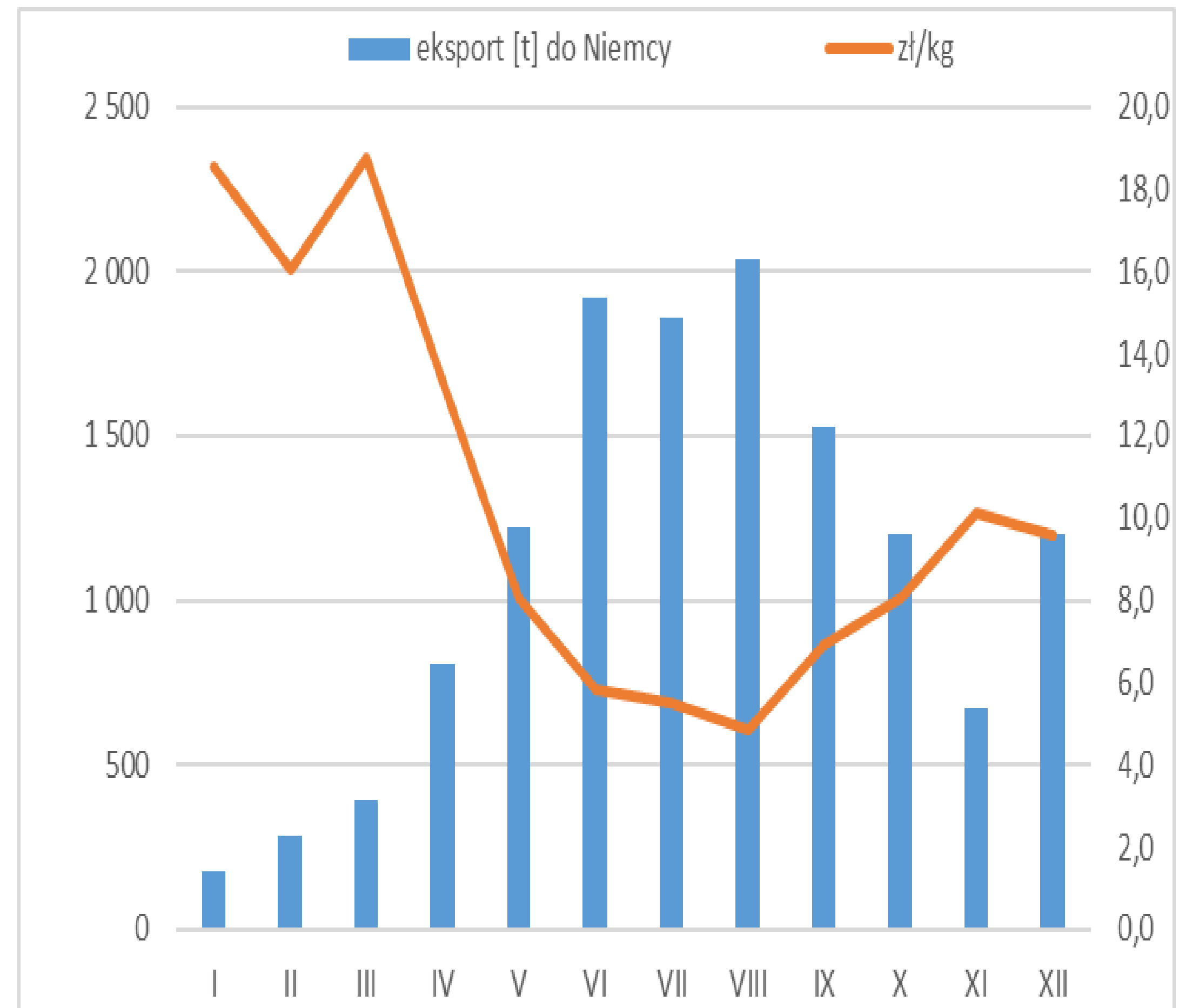
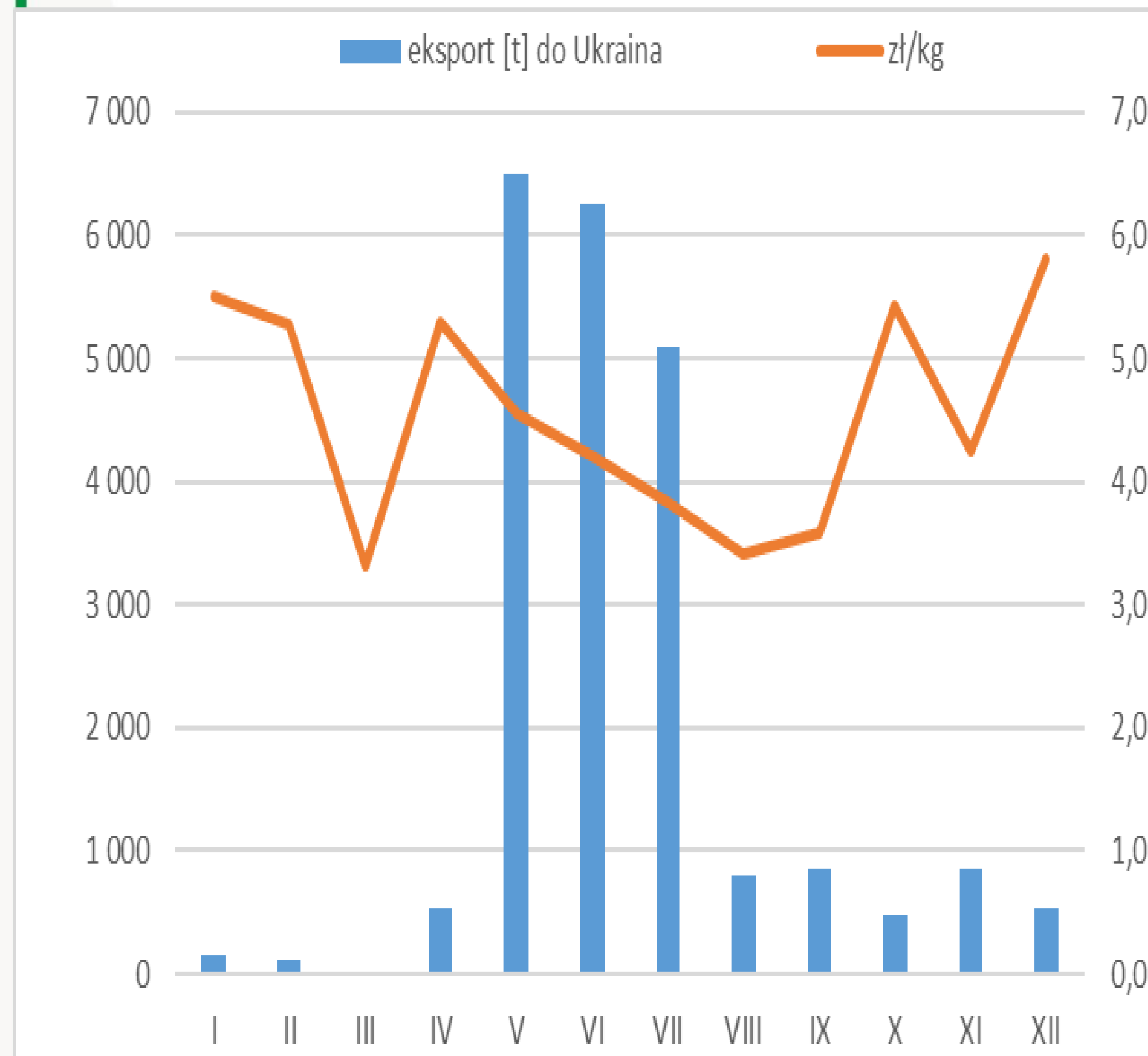


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## 4. EXPORT FROM POLAND



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- 5. Forecasts for summer 2023
- Accumulation of production in Europe – no light tomato in the Netherlands
  - No stability of supplies - delay in production, no investment in crops
  - Focus on the local market - transport costs, knowledge of customers
  - Aggressive policy of retail chains - high prices - fight for the customer
    - ToBRFV - reduction of production up to 20%
    - Problem with exceeding MRLs

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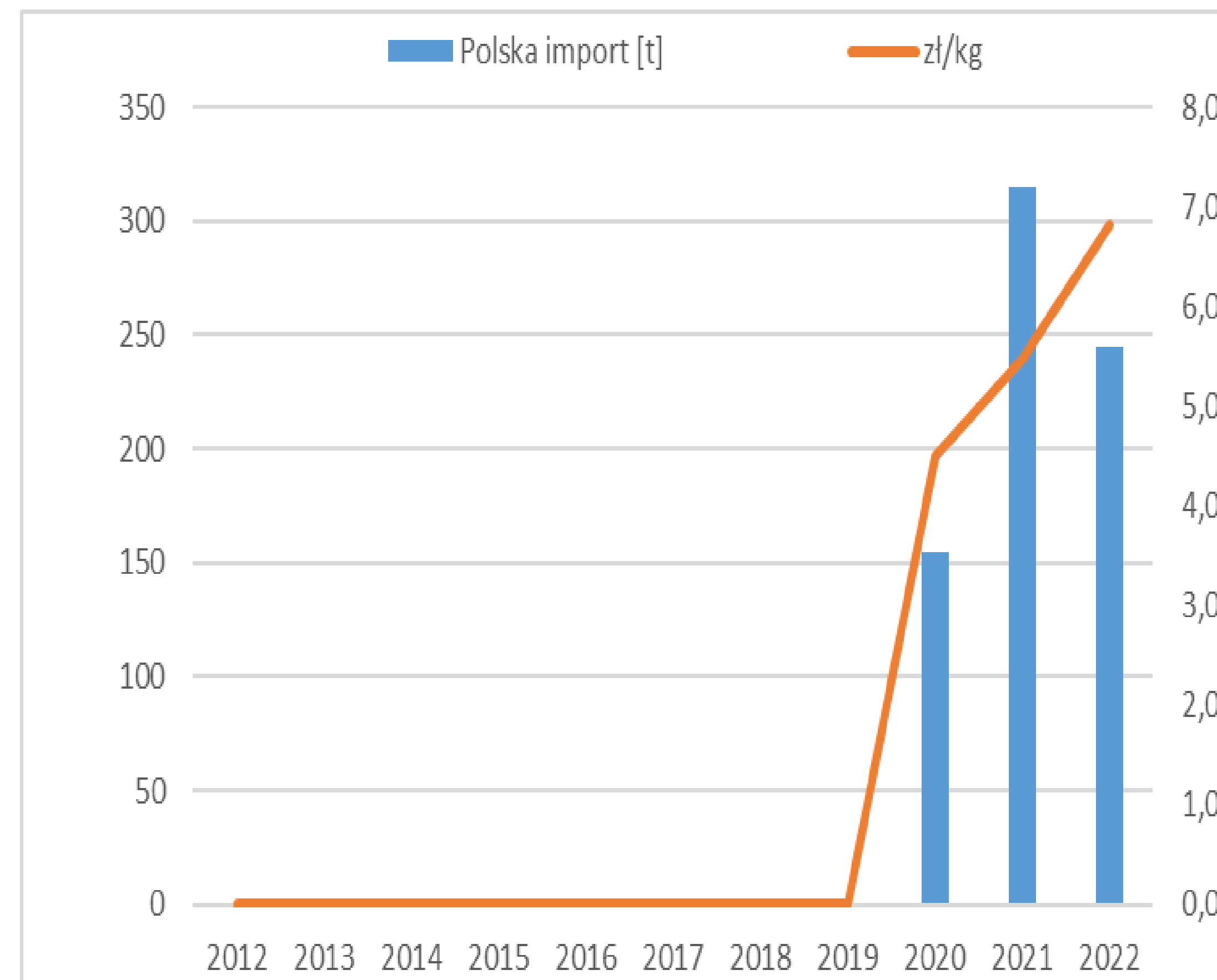
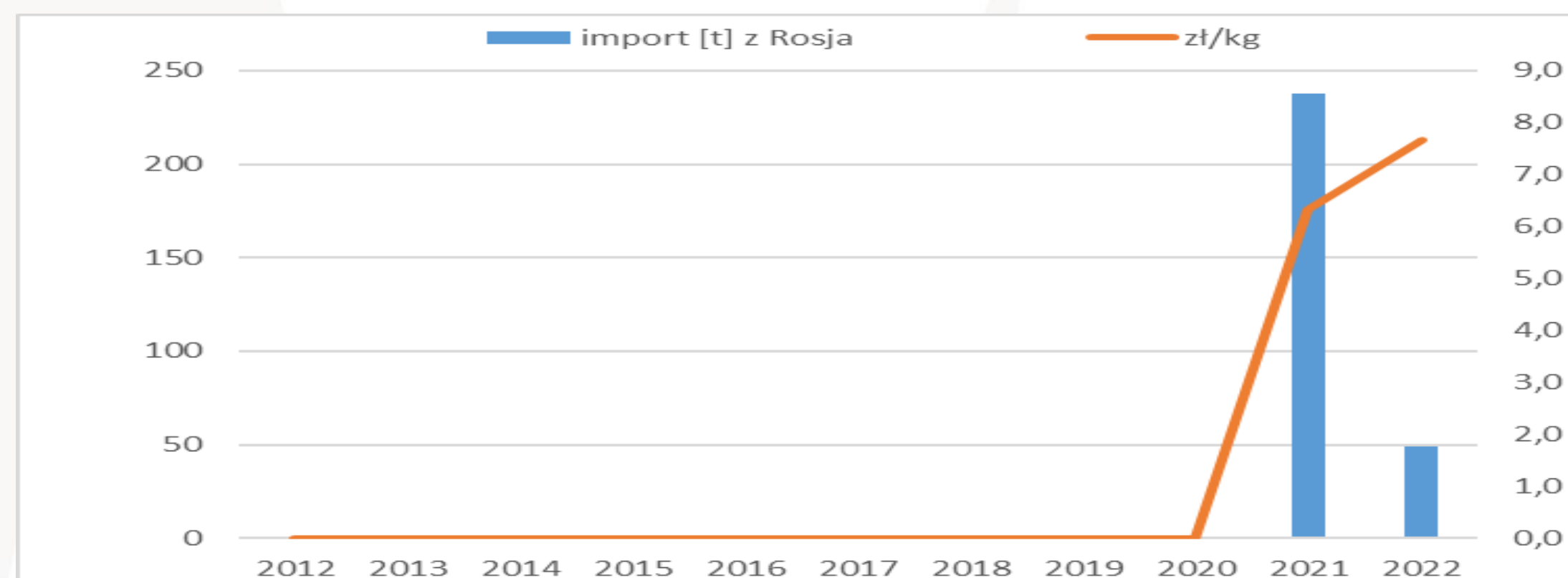
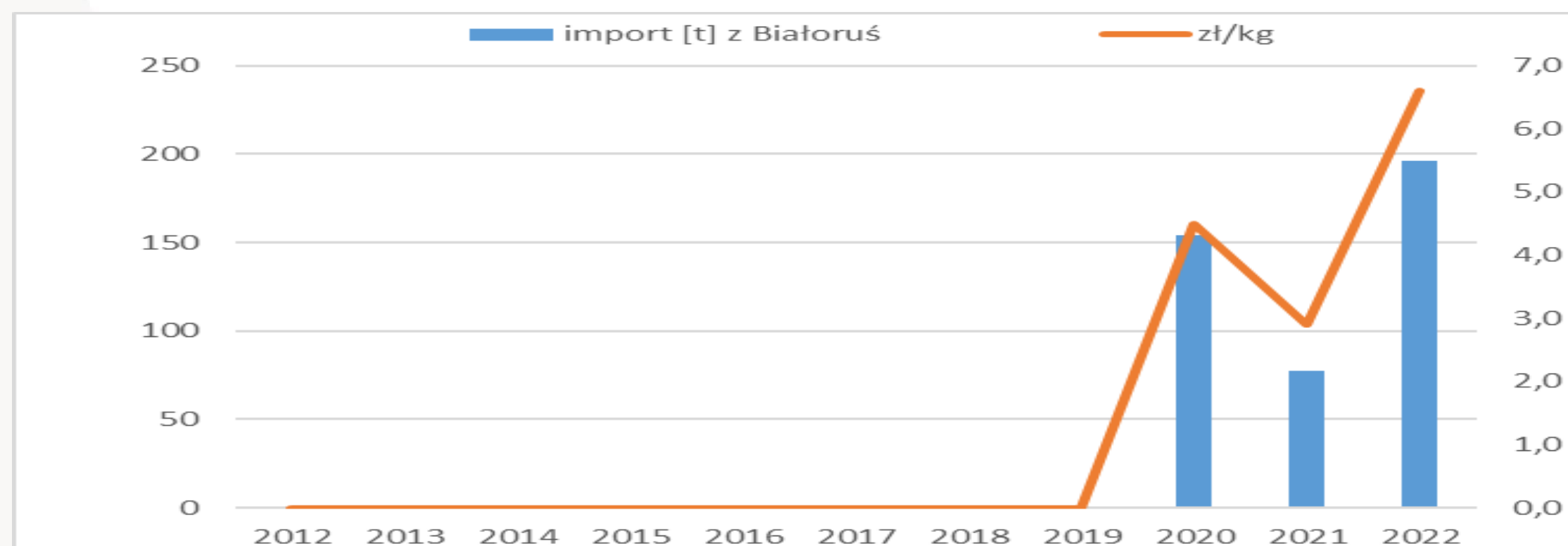
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### The EU-Russia situation



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**Thank you for your attention**

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