

Consumer insights tomatoes

Market Observatory Tomatoes

June 21 th 2024



Most bought vegetables in 2023 vs 2022 and 2019

On volume base; source GfK/Kantar



The Netherlands

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Tomato	0%	+ 4%
2. Onion	- 6%	+21%
3. Cucumber	0%	+11%



Germany

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Tomato	0%	+ 3%
2. Cucumber	+16%	+25%
3. Carrot	- 5%	+ 3%



United Kingdom

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Carrot	- 1%	+ 2%
2. Tomato	- 5%	- 4%
3. Onion	+1%	+ 7%



France

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Tomato	0%	+ 1%
2. Carrot	- 5%	- 7%
3. Zucchini	+10%	+ 2%



Italy

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Tomato	- 3 %	- 12%
2. Carrot	- 5 %	- 2%
3. Zucchini	+3 %	- 6%



Belgium

	% change	
	<u>vs 2022</u>	<u>vs 2019</u>
1. Tomato	- 3%	- 8%
2. Carrot	- 7%	- 4%
3. Onion	- 1%	- 3%

**Last 5 years: fall fresh tomato consumption UK (-5%),
Southern countries Italy and Spain >10% ↓**



ACTUAL FRESH TOMATO CONSUMPTION IN KILO PER CAPITA IN 2023



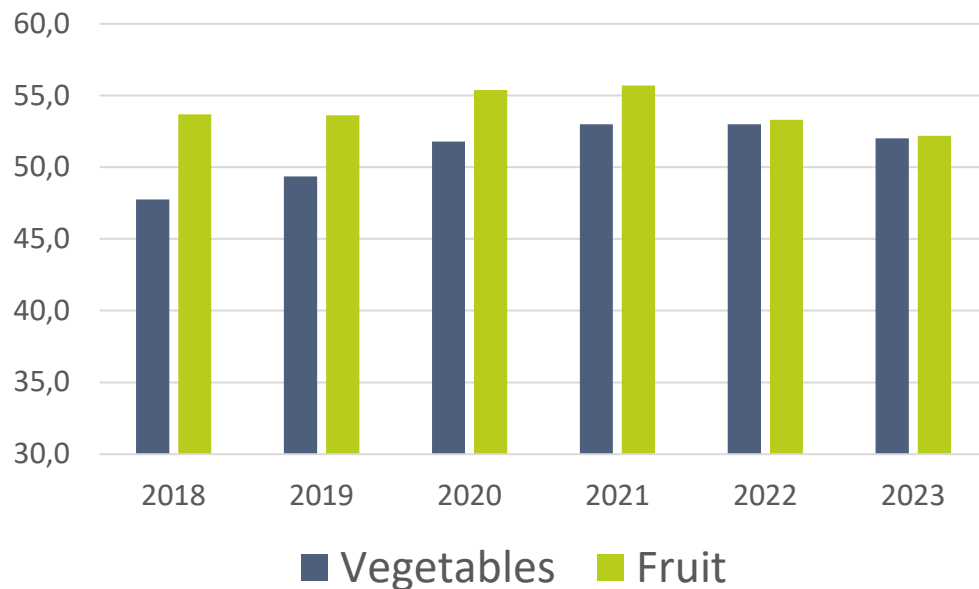
Spain: consumption in Spanish households 2019-2023: -15% (MAPA)

Focusing on consumption in the Netherlands

The "booster" benefit of COVID-19 started to disappear



Consumption fresh F&V per capita (net intake) in NL in kilogram

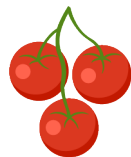


Based on consumerpanel (GfK) and foodservice (Foodstep)

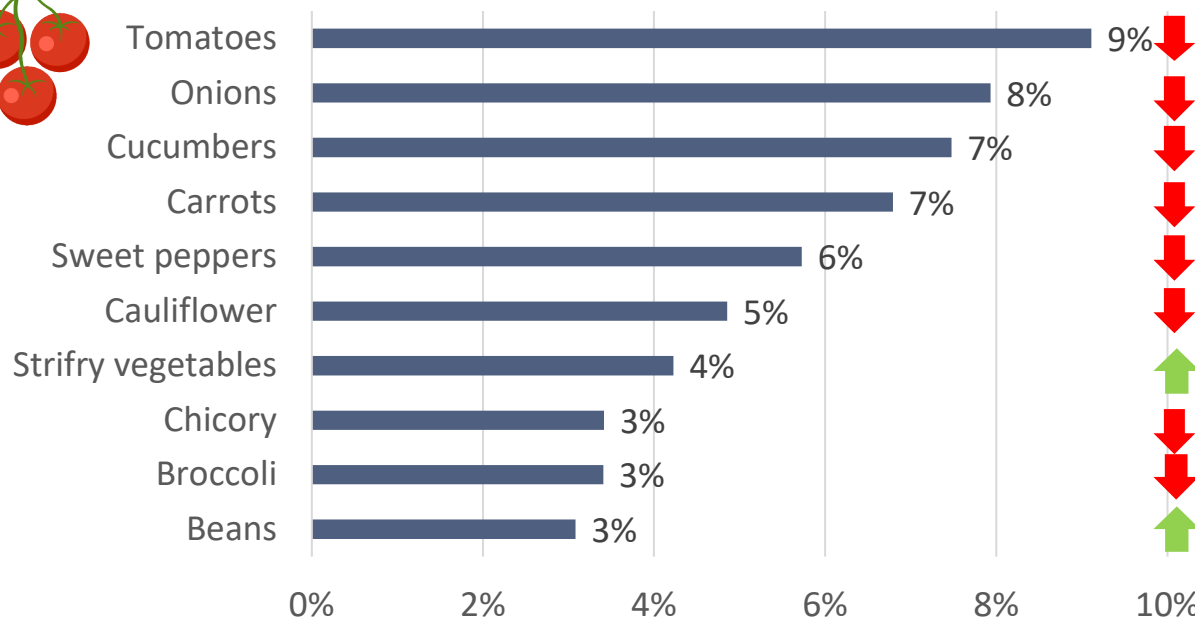
Top-10 most bought vegetables in NL

In % based on total bought volume per household; source GfK

↓ ↑ = volume 2023 versus 2022



Top-10 vegetables in 2023



Remarks tomatoes 2023 vs 2022:

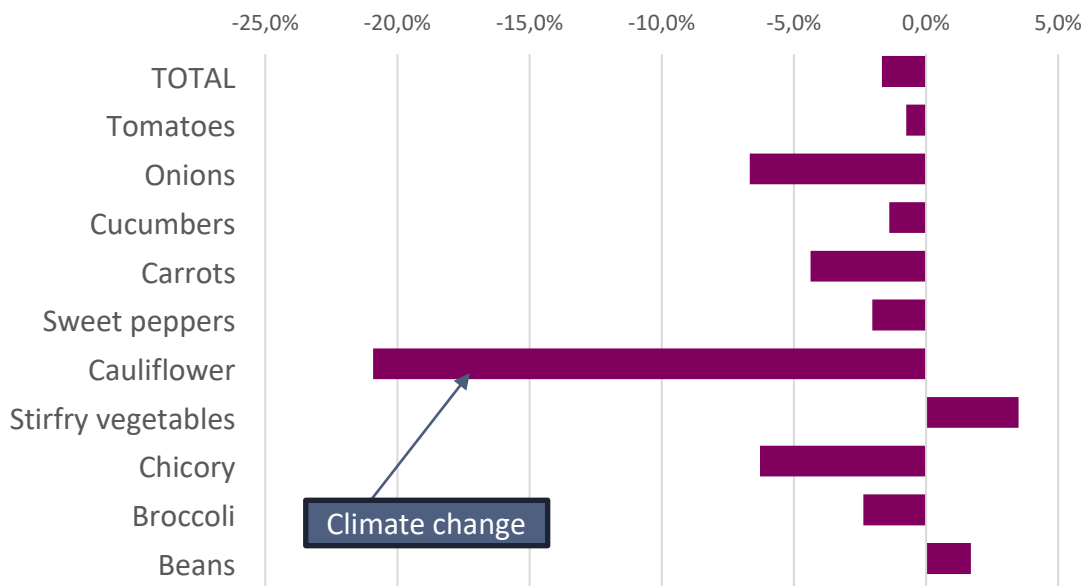
- Price kilogram tomatoes +4%
- Sales round tomatoes -45%
- Sales vine (+9%) and baby plum (+4%)

Winners and losers fresh vegetables in NL 2023

Some periods less availability (by climate) such as cauliflower, chicory, onions



Top 10 most bought vegetables per household in NL in 2023 comparing 2022 (volumebase)



Remarks 2023:

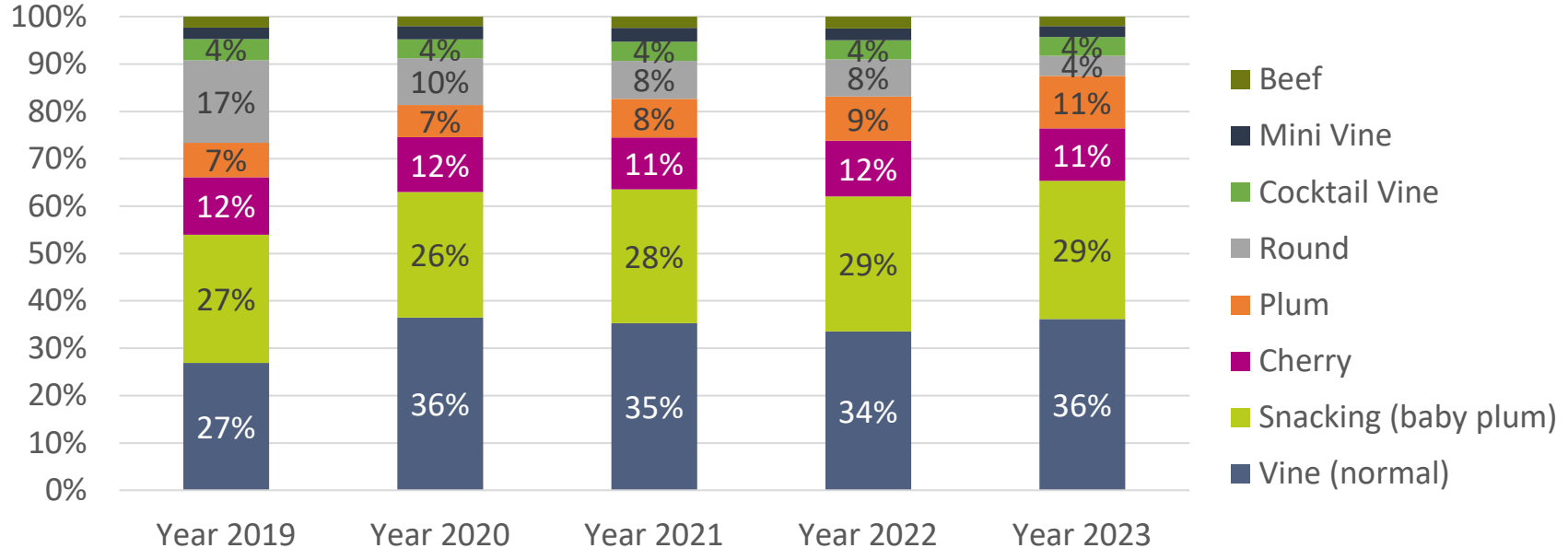
- Price kilogram vegetables +9%
- Sales fresh meal kits in supermarkets +19%!!
- Despite inflation consumer is still willing to pay for convenience: sales fresh cut vegetables +1%



Fall supermarket sales round tomatoes in NL; plum tomatoes on the rise

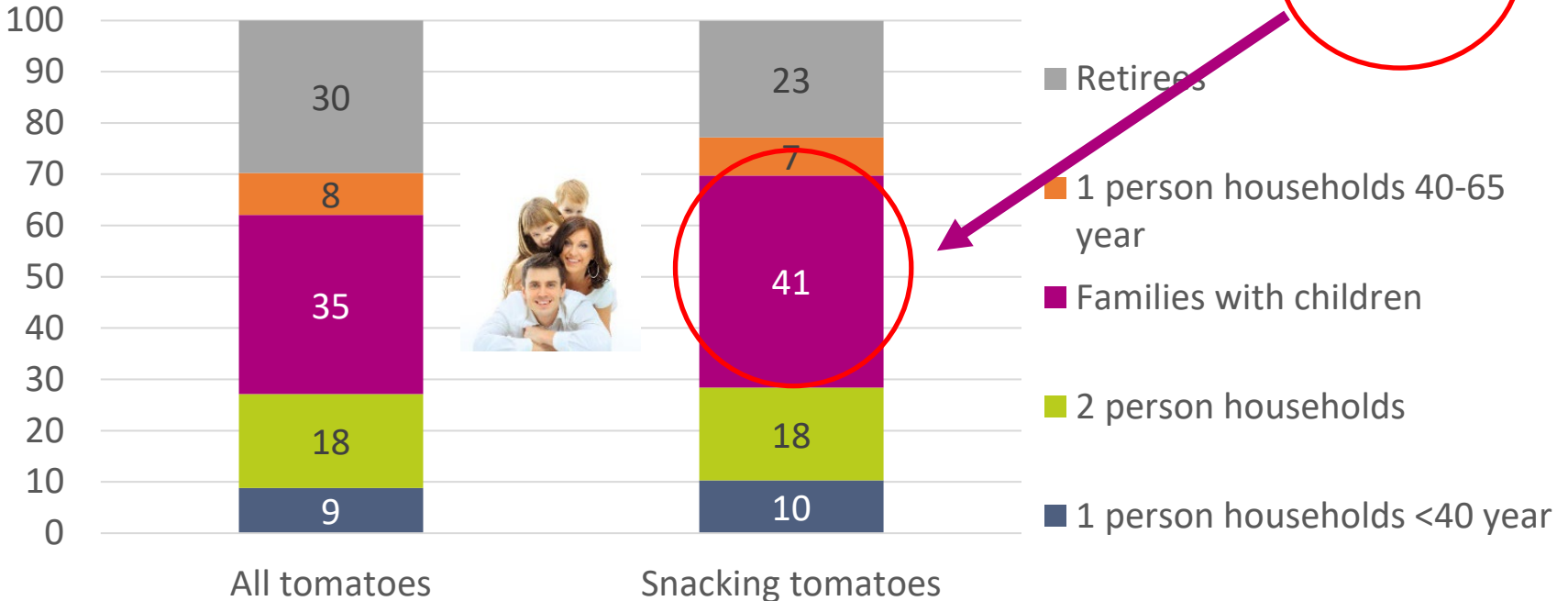


Supermarket sales tomatoes in NL; based on volume; source
Circana/Fresh Produce Centre



Families with children love special/snack tomatoes

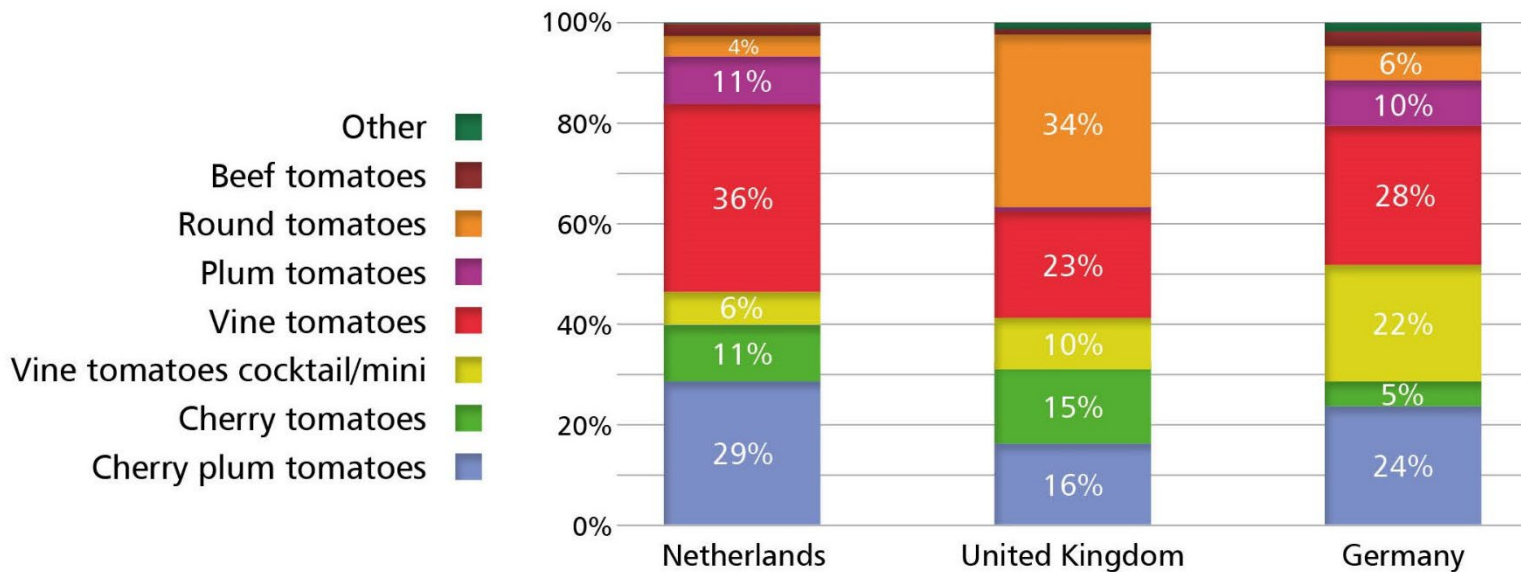
Bought volume in the Netherlands in 2023 in %, source GfK



Different consumer preferences tomatoes

WHICH TOMATOES ARE BOUGHT BASED ON VOLUME

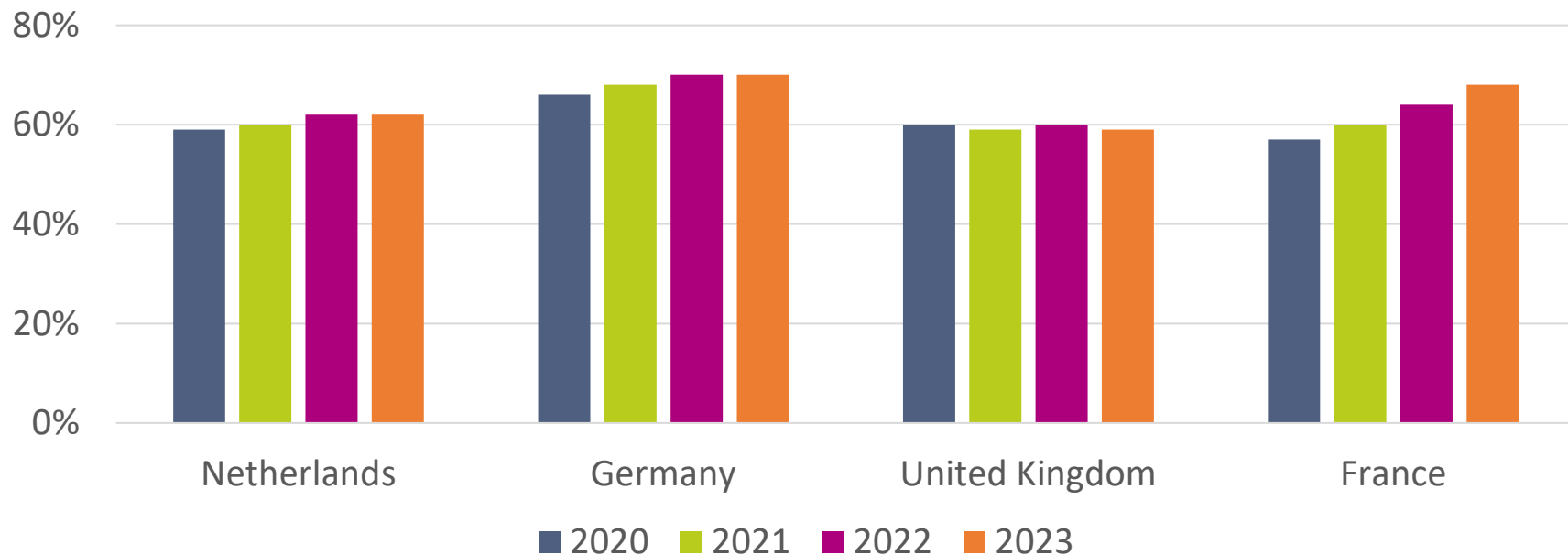
Source: Paneldata/Fresh Produce Centre



Number of buying households snacking tomatoes is stabilizing in 2023



% buying households snacking tomatoes
(=baby plum; not on the vine)



Source: GfK/Kantar

Conclusions

- Tomato still by far the most favorite vegetable in Europe: except in UK (carrot nr. 1)
- Consumption 2019 – 2023: In several European countries fall, such as ES, IT, UK, SE, BE; small rise in DE, NL, FR
- Lower consumption due to lower EU production (-10%), shift to small tomatoes, high inflation
- Consumption 2023 vs 2022: most EU countries stable/small decrease
- Shift in retail from round tomato to vine and snacking tomato



Thank you for your attention

