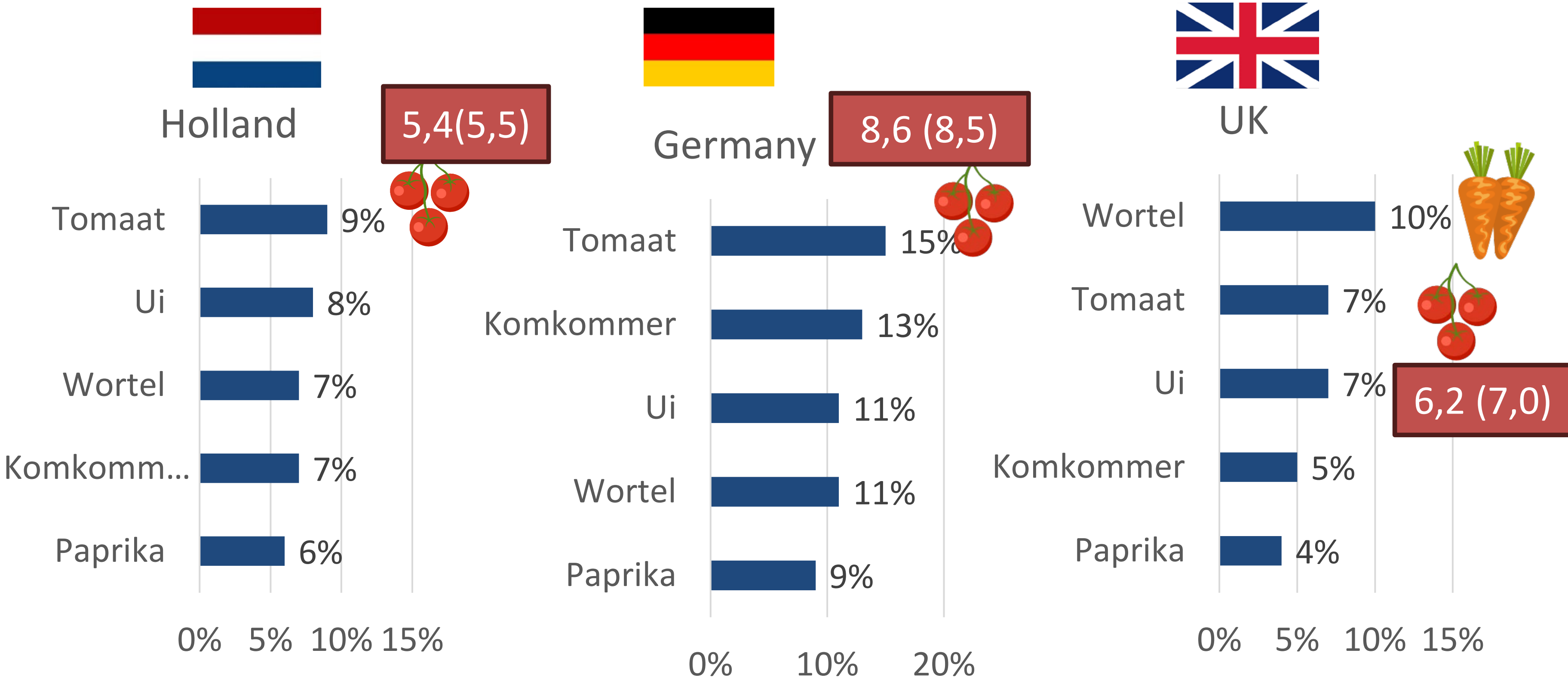
Production insights tomatoes

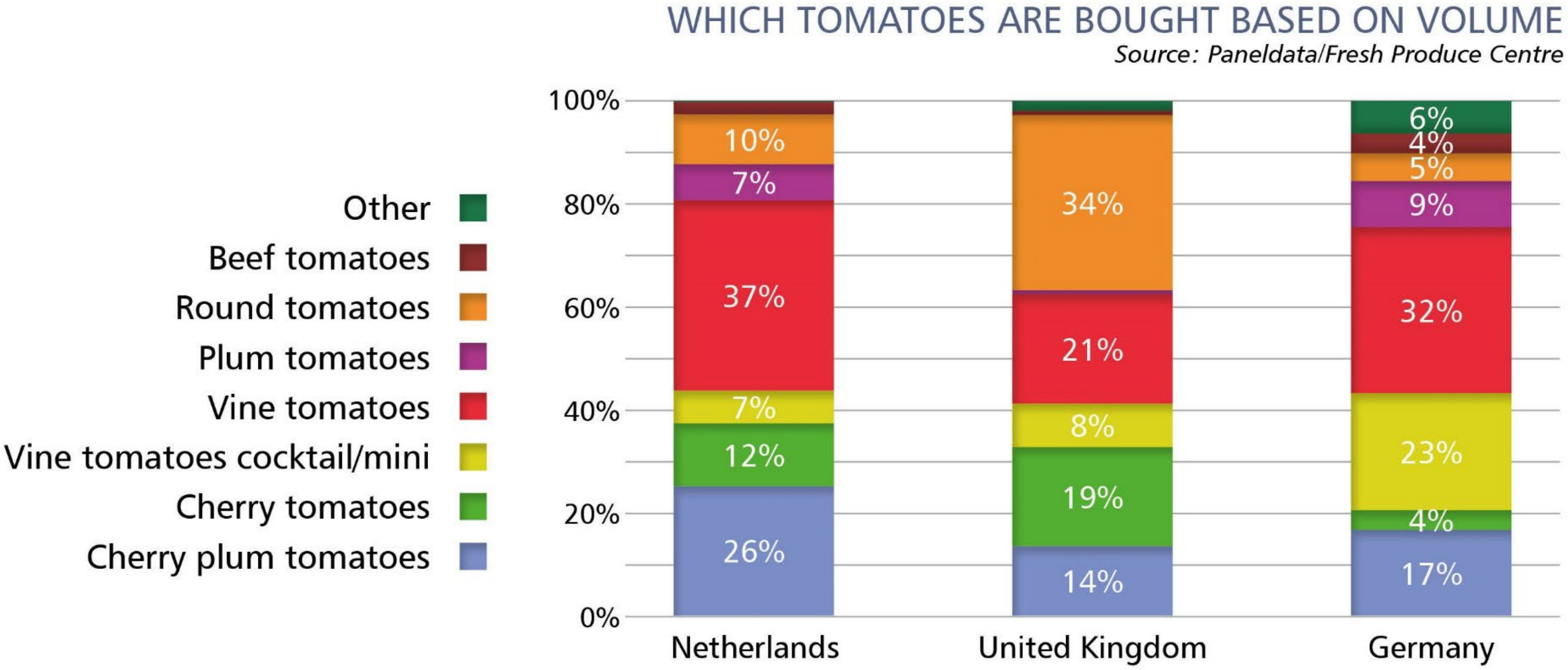
21 June 2024

Tomato most bought vegetable NL and GER

In % volume bought fresh vegetabke SOURCE GfK/Kantar/GroentenFruit Huis, consumption 2023 (2020)

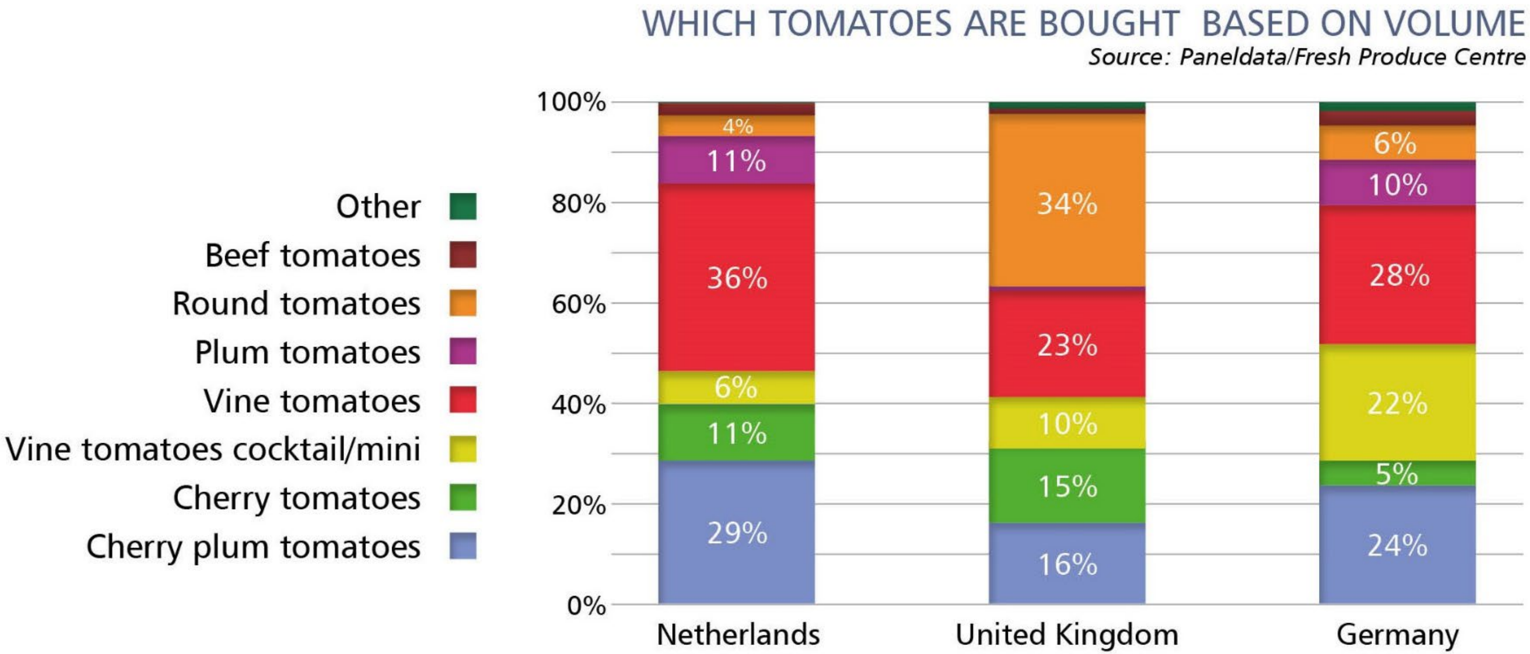


Different consumer preferences tomatoes 2020



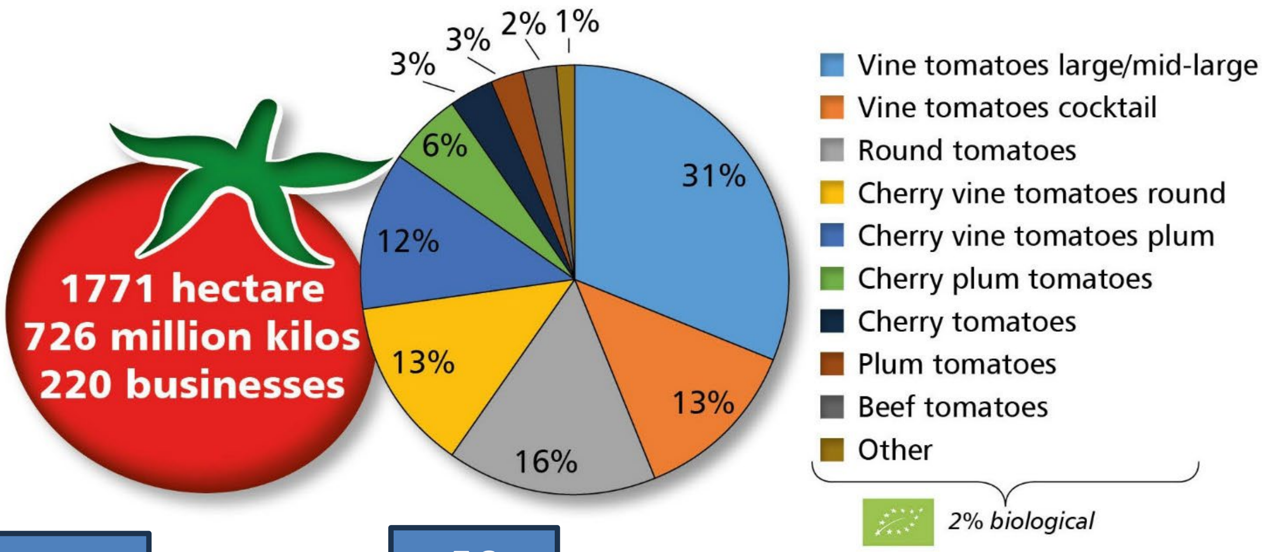
Round+Vine	47	55	37

Different consumer preferences tomatoes 2023



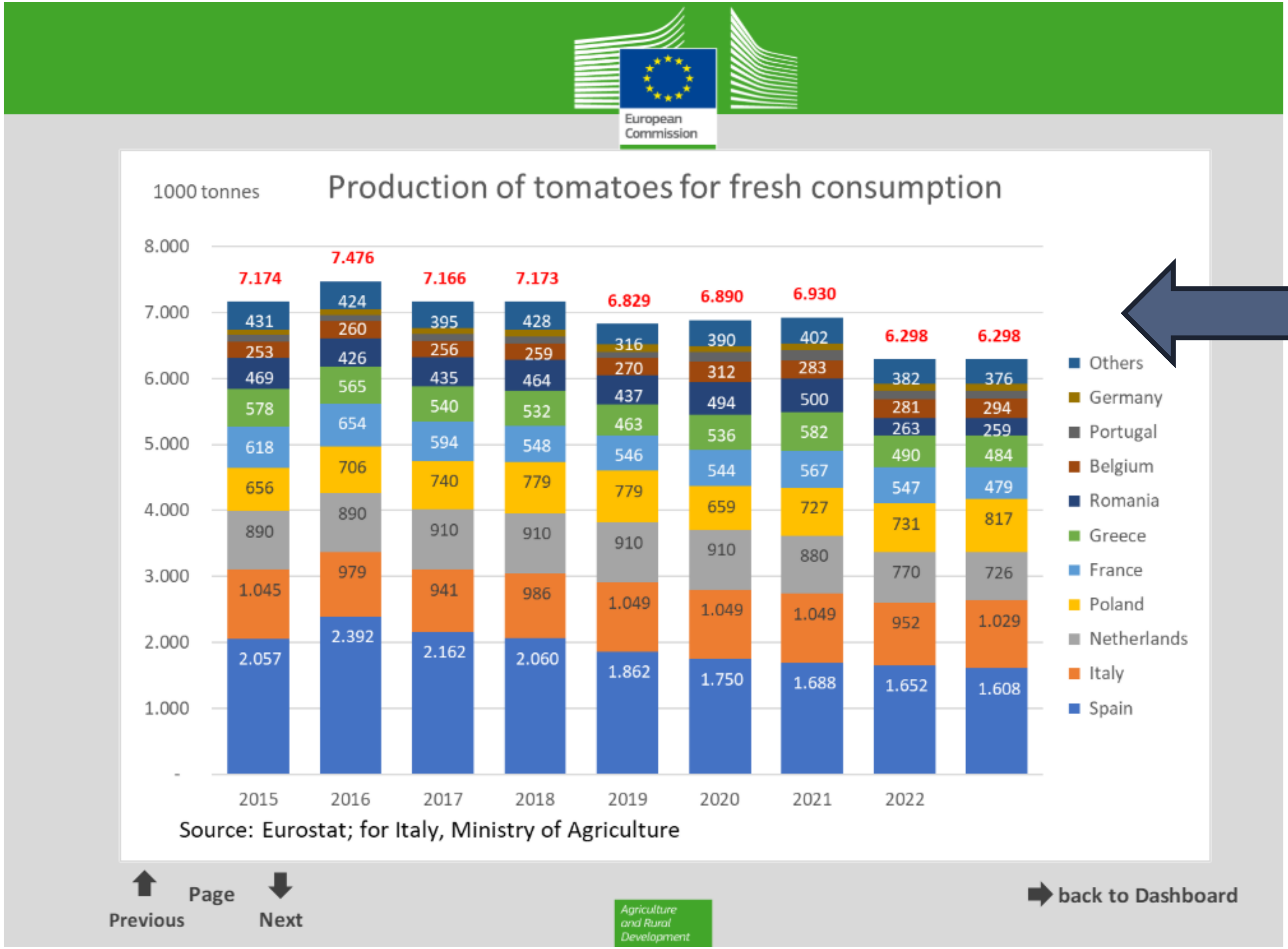
Round+Vine	40 (47)	58 (55)	34 (37)

Assortiment in NL industry 2023



Round+Vine

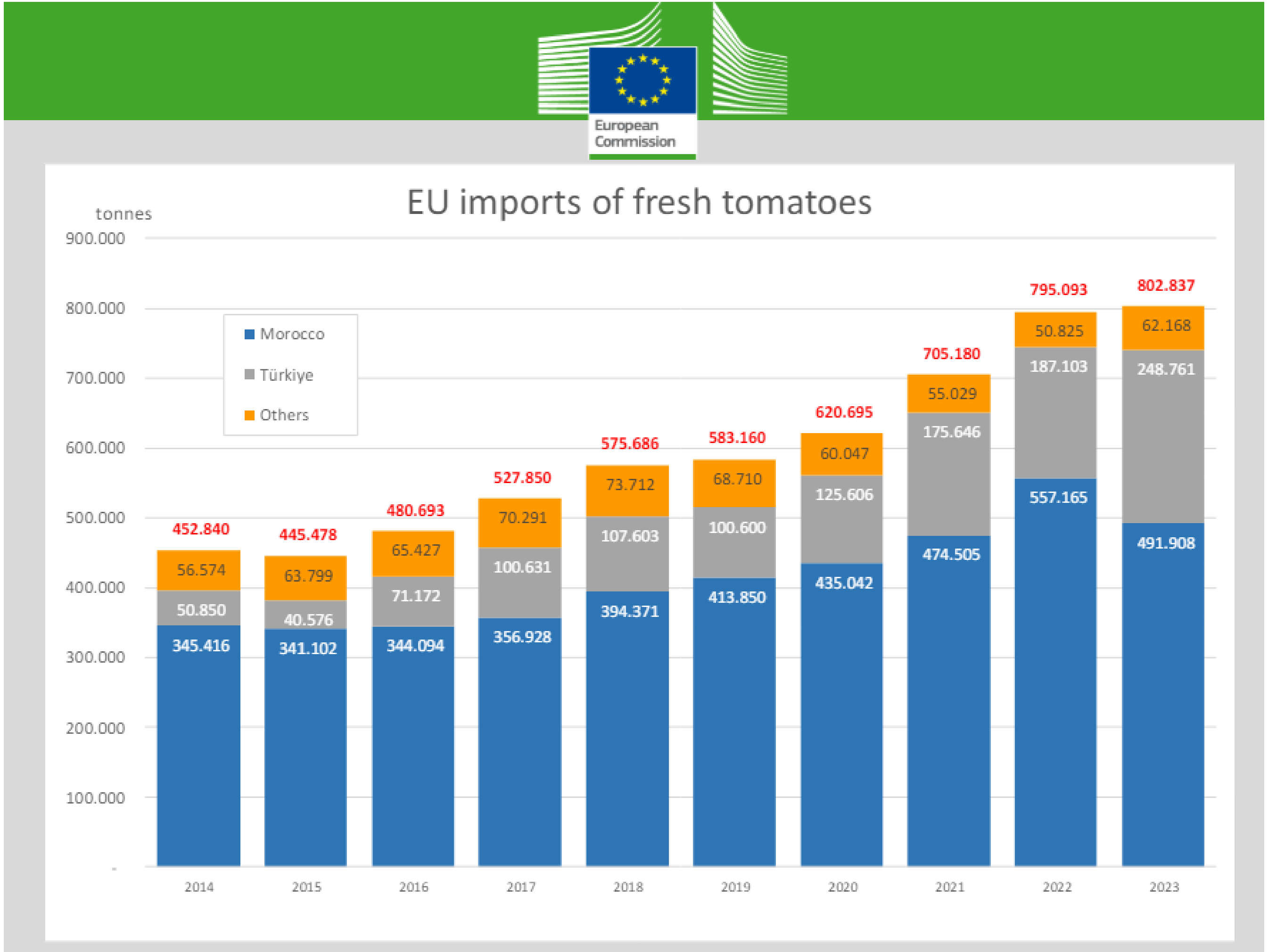
56



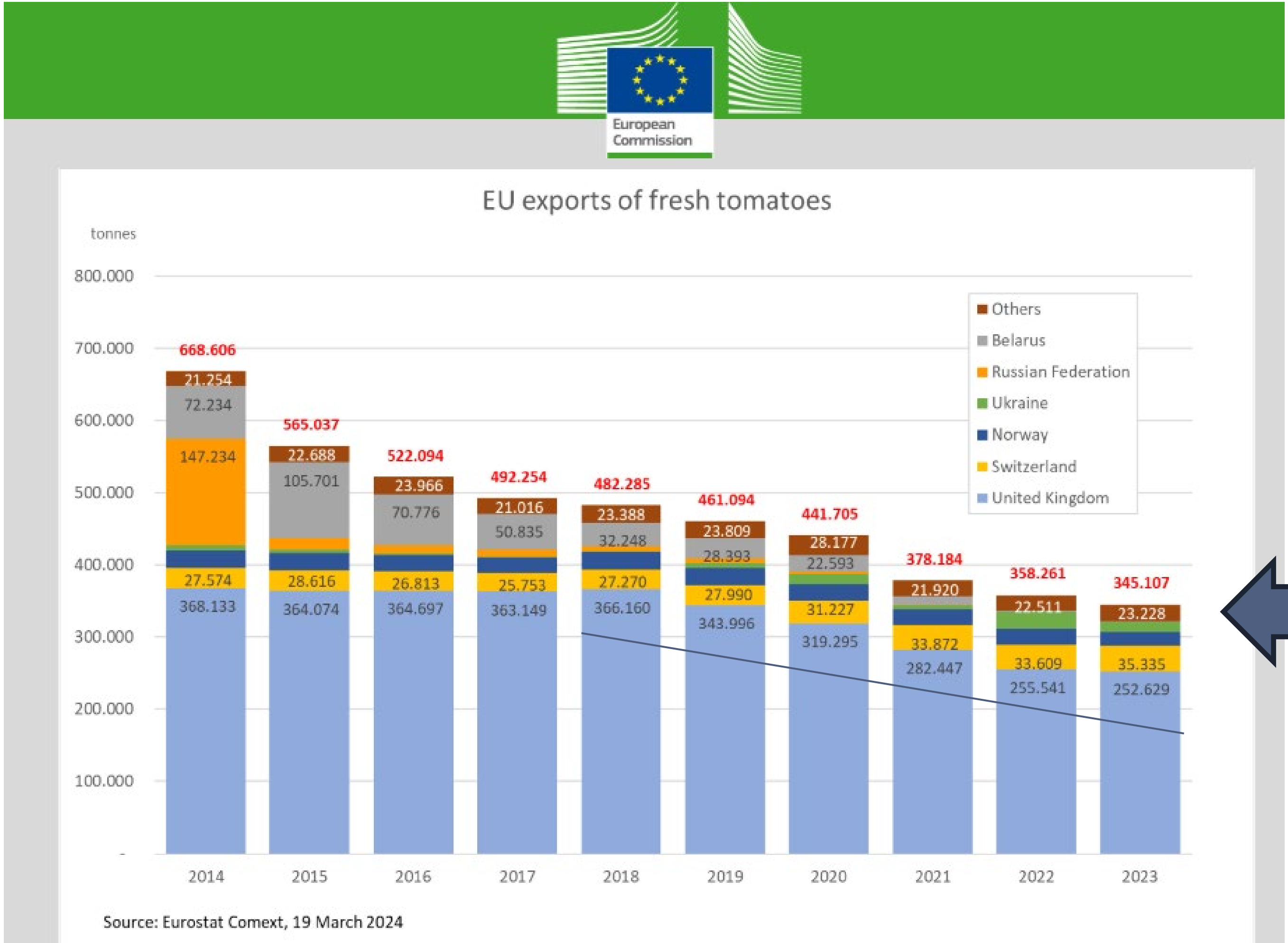
10 % reduction =700.000 ton

NL 2022 vs 2023

-early 2023 very low winterproduction
- bad summer 2023
- august: some 200 ha shift back into normal winter plantingseason under lights
- ToBRFV damage stable (>half acrage is affected)
- shift to some larger varieties

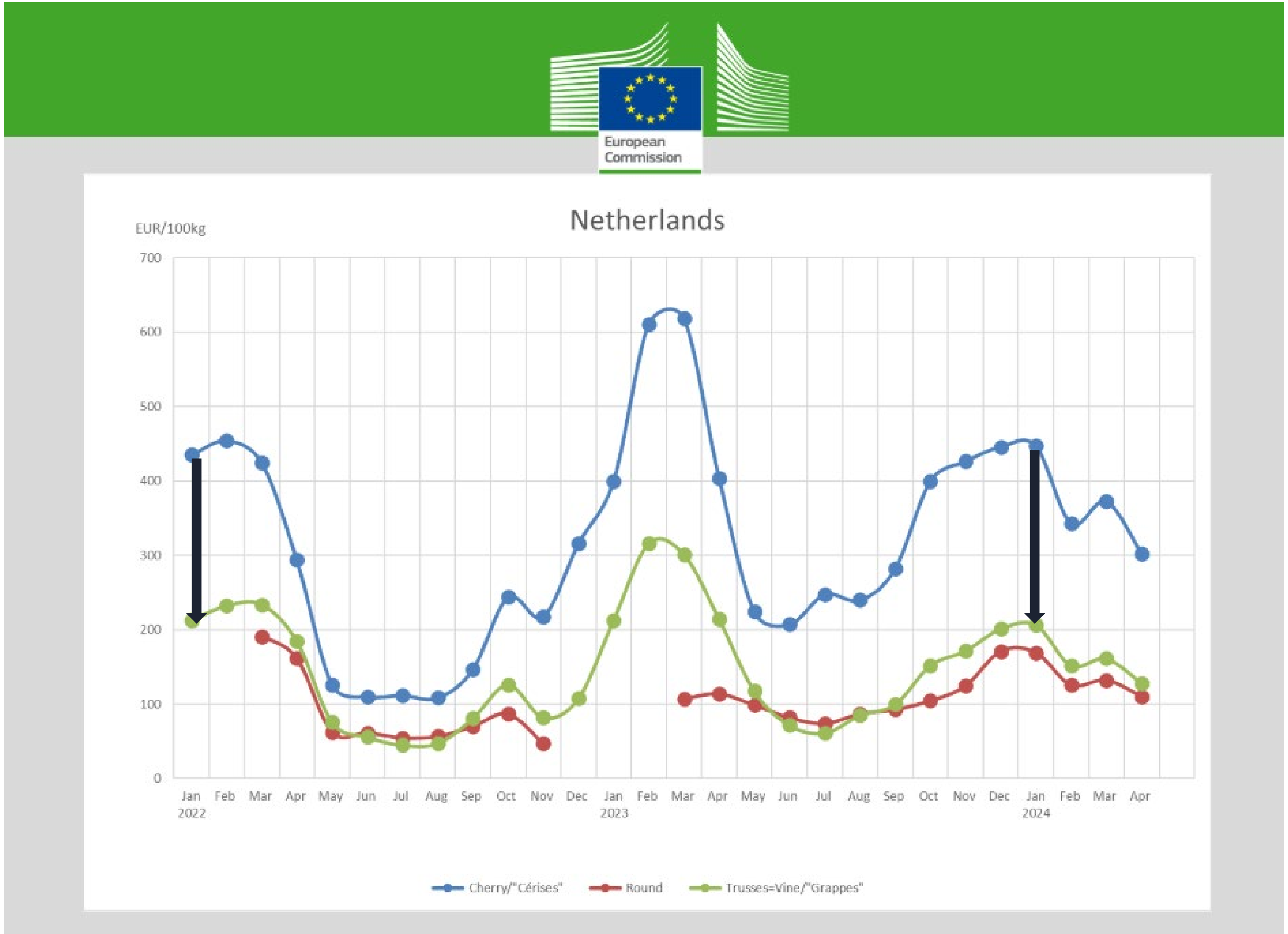


Import plus 100.000 ton compare to 2021



75 % from EU export to 3th country is UK

80-85 % from EU to UK originates from SP and NL



Dutch Prices

(exit packing station)

Getting back on the track of market orientated production ?

SUMMER PRODUCTION	2020	2021	2022	2023	f 2024
Surface fresh tomatoes (ha)	**1.870**	**1.850**	**1.815**	**1.770**	**1.800**
% organic	2%	2%	2%	2%	2%
% non-organic	98%	98%	98%	98%	98%
% greenhouse	100%	100%	100%	100%	100%
% open field	0%	0%	0%	0%	0%
%Round tomatoes		11%	11%	13%	14%
%Vine tomatoes		59%	60%	63%	59%
%Other tomatoes (cherry, mini-type…)		30%	29%	24%	27%

Costs of labour NL .. / /hr

Specials back on track TORBRV: taste and quality

Will the consumer pay ?

Getting back on the track of market orientated production ?

WINTER PRODUCTION	2019/20	2020/21	2021/22	2022/23	f 2023/2024
% organic	0%	0%	0%	0%	0%
% non-organic	100%	100%	100%	100%	100%
% greenhouse	100%	100%	100%	100%	100%
% open field	0%	0%	0%	0%	0%
%Round tomatoes					
%Vine tomatoes		40	65	65	70
%Other tomatoes (cherry, mini-type...)		60	35	35	30
% destined to national market					
% destined to exports EU					
% destined to exports non-EU (incl. UK)					

Costs of labour
NL .. / /hr
SP ... / hr
N-Africa .. / hr

- Specials are high risk (TOBRFV)
- Only vine specials

Will the consumer pay ?

2024 tomato <u>production</u> developments

- **Very dark spring 2024:**
  - low volumes
  - Many many resistant varieties: trial and error …….
- **Majority planted varieties is IR/HR resistant,** under lights 100%, normal: 50 %. Expected lower yield of 7 % with HR/IR
- **No classic lighting with SON T** in upcoming winter, to expensive, electricity tax from 2026
- 600 HA LED expected winter 2024/25, yields approximately the same as SON T:
  - investments a lot higher
  - running cost a lot lower (electricity)

Fresh Produce Centre

DPA Dutch Produce Association

2024 Tomato <u>sector</u> developments

- Impact commercialization during Enery crisis: some contracts were adjusted. Now, customers know a lot on costs…… and use that information…. Not unfair but if feels unfair
- >85 %-90 % NL production is under a recognized PO, largest 3 have a market share of > 65 % together
- PO's working together with producers (or PO's) in other countries or set up facilities in EU and NON EU countries to have year round supply for nearby customers
- Private investors are entering the tomato sector: different way of financing
- Brexit: Medium risk ?? 1/10/2024 ?
- How to cope with upcoming PPWR ?

Fresh Produce Centre

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Thank you for your attention