

Update situation tomatoes in the Netherlands (+BE + GER)

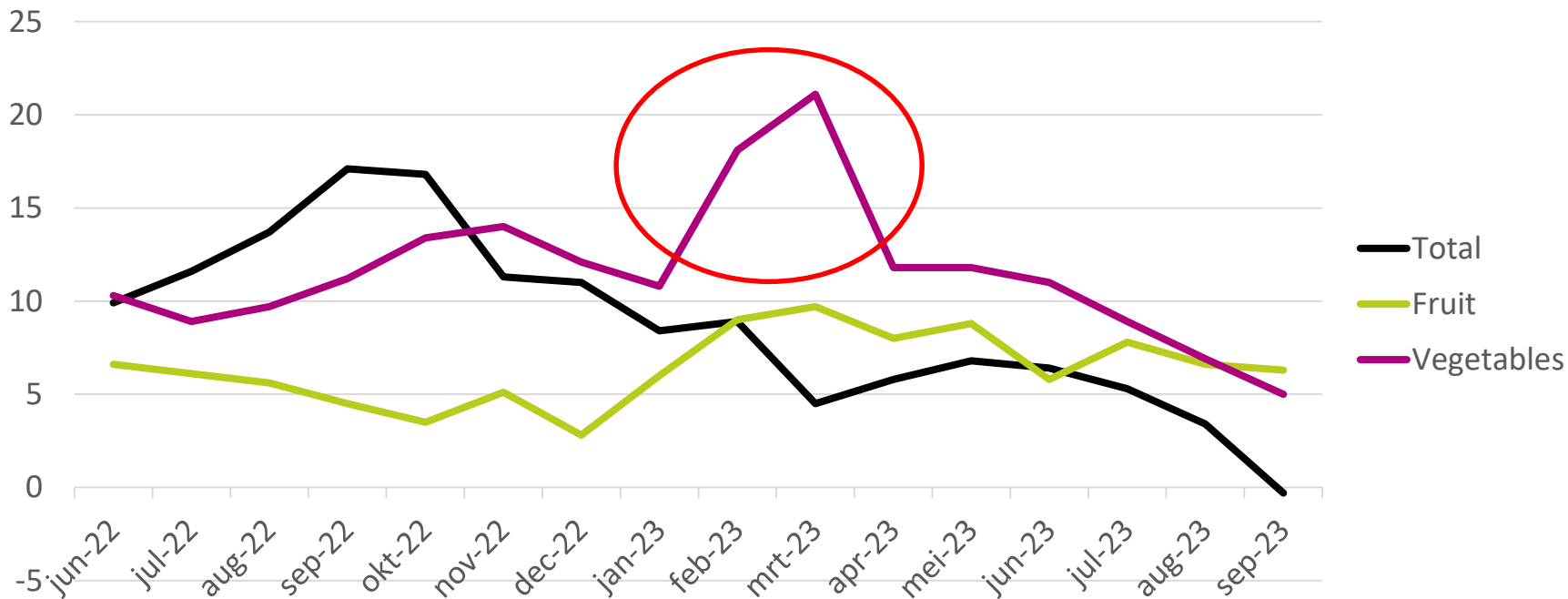
October 26th



Sept 2023 deflation in the Netherlands, but still 15% above sept 2021 !



Inflation in NL in % compared with previous year; source CBS



Small drop tomato sales in Dutch and German retail



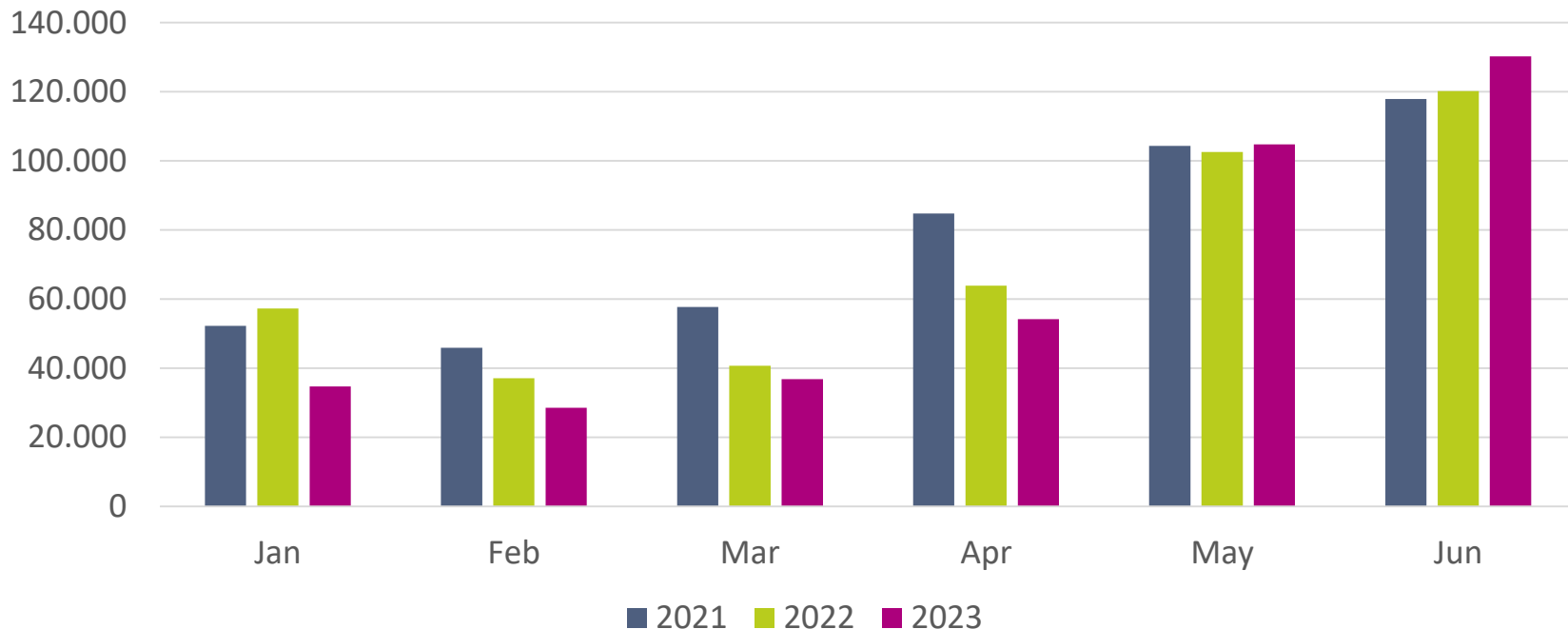
Jan - June 2023 compared with 2022

- Netherlands:
 - 1% less volume in retail, 6% higher price
 - Volume: on the vine +7%, snack tomato +8%, mini vine -9%, cherry -6%
- Germany:
 - 1% less volume in retail, 1% lower price
 - Volume: on the vine +6%, mini types -5%



Low Dutch export Jan-Apr 2023; higher volumes in summer

Dutch export tomatoes (including re-export) in 1.000 kilo; source Eurostat



Dutch tomatoes most popular in UK in June

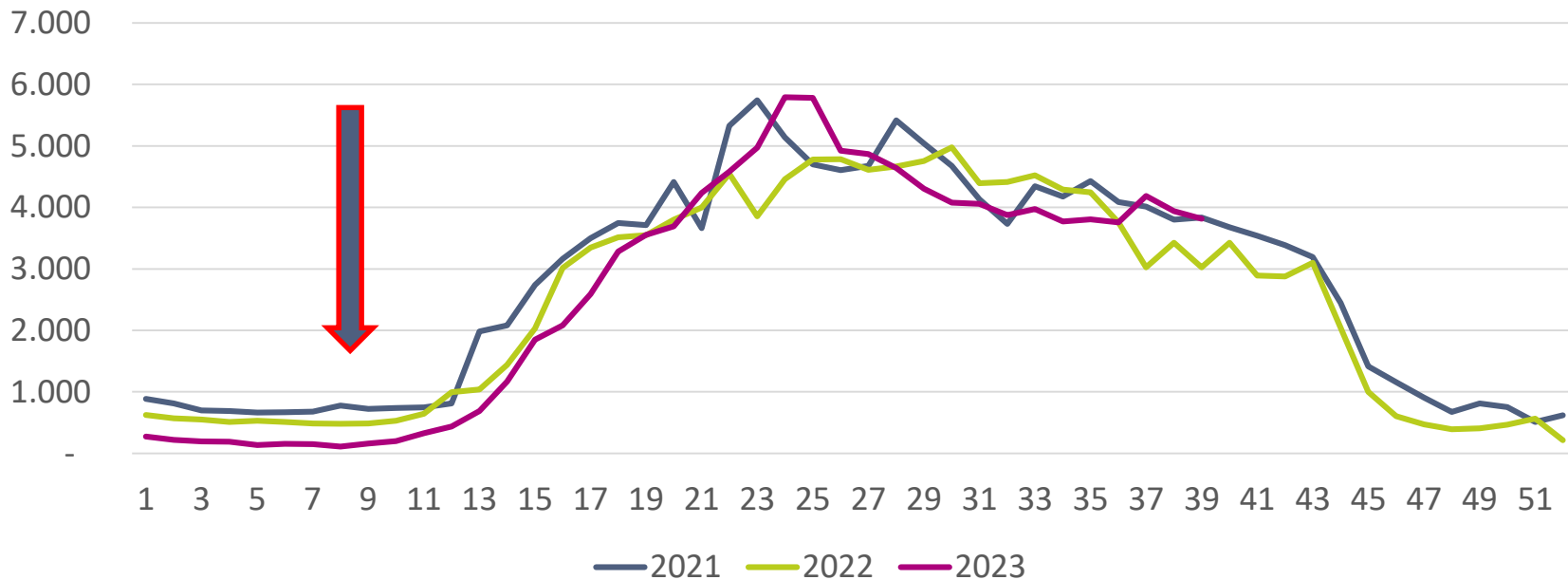
Jan-Sep 2022: 109 million kilo

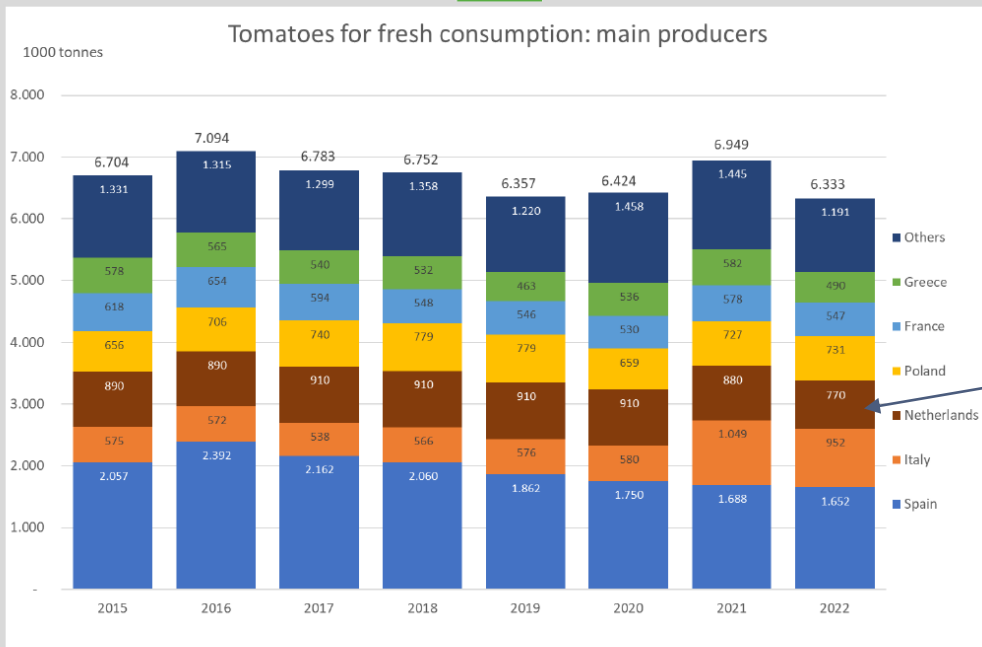
Jan-Sep 2023: 105 million kilo



Weekly export tomatoes Dutch origin to UK in 1.000 kilo

source: KCB/Fresh Produce Centre





Decrease 2022 in volume by 15 %
(compare to '17-'20) due to
5- 10 % TOBRFV
1 % other varieties
7 % Energy crisis

UPDATE 10/23: Volumes NL Q1
ultra low, Q2 and 3 lower than
expected due to weather condition
and less ha (more cucumber): all
had impact on market prices

Summer production 2023



Fresh tomatoes in NL

SUMMER PRODUCTION	2020	2021	2022	f2023
Production fresh tomatoes (tonnes)	760.000	730.000	690.000	730.000
Surface fresh tomatoes (ha)	1.870	1.850	1.815	1.750
% organic	2%	2%	2%	2%
% non-organic	98%	98%	98%	98%
% greenhouse	100%	100%	100%	100%
% open field	0%	0%	0%	0%
%Round tomatoes		11%	11%	13%
%Vine tomatoes		59%	60%	63%
%Other tomatoes (cherry, mini-type...)		30%	29%	24%

No clear view yet
on Summer
production 2023



1. Some producers stop more
early to switch to a planting
rotation for lightning

2. Summer was no summer,
september was our summer

3. No clear view on (good)
production in upcoming 8 weeks

Exp. winterproduction 23/24: 450 ha, 50% vine>47mm, 50% special

Developments TOBRFV NL/BE/GE

- 2023 effect on cucumber market, additional + 50 ha in NL
- Former tomato farmers (now growing cucumber) do not return to tomato production yet in NL.
- Some tomato producers stopped and sold their greenhouse
- 57 sites recorded with an affection, estimated that over 50% acreage is affected
- Lots of IR / HR varieties, varieties with a short life cycle in the market. Every half year a switch to other new varieties as new varieties do not contain all other characteristics such as specific taste, shelf life, good color etc. Yield expected – 10 % ? ?
- Expected that 75 % acreage in 2023/2024 is planted with IR/HR varieties. Availability of seeds is an issue (shortage)
- Uncertainty of availability of high quality special tomatoes from South Europe/North Africa in winter 2024





Thank you for your attention