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PRIMEUR

FreshPlaza

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International edition
Greenhouse vegetables, Asparagus and strawberries

PRIMEUR

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"Ghana has established itself as a reliable year-round producer of okra"

Okra from Ghana

After Ramadan, ethnic customers traditionally focus a little less on vegetables and more on exotic fruits. "The first Spanish medlars start coming in at the end of March, and the supply gradually picks up over the first week of April. At the beginning of the new medlar season, demand is traditionally lively. Towards summer – that is, around June/July – demand drops noticeably, which is due to the wide variety of other fruit products," reports Hacer Temiz, importer and managing director of Asia GmbH, based in Krefeld.

Another product highlight in the fruit sector is cherimoya, which is often also advertised in Germany as the custard apple. "We don't work with overseas goods from Brazil, but only with Spanish cherimoyas, which are usually available from September to July. I am convinced that this product has now outgrown the exotic segment. Nevertheless, it is a delicate fruit with a relatively short shelf life. This in turn means that the customer needs a certain turnover rate or flow rate to prevent too much spoilage and to ensure that the product is profitable," outlines Temiz.

Cherimoyas are also sold in local markets in Spain. "At the local market, mainly larger calibers are sold, while in Germany, on the other hand, the smaller and cheaper goods are preferred. The larger the fruit, the more flesh and fewer seeds," says the experienced businesswoman. Immediately after the start of the harvest in September/October, the quantities available are typically much larger. "The second harvest wave from February onwards, on the other hand, is considered to be the low season, which has a corresponding effect on the availability of quantities and the price situation. In the second half of the season, there may be bottlenecks, although enough goods are currently being exported to meet demand."

YEAR-ROUND MARKETING OF OKRA AND BROAD BEANS

Okra is an integral part of the range and is now available from Ghana all year round. Temiz: "We imported okra for the first time in 2020, at that time still from India and Honduras. However, it turned out that the Honduran product did not quite meet the needs of the German market because it was too large. In contrast, the slightly finer product from Ghana was better received by our customers. Ghana has also established itself as a reli-

Medlars

Spanish medlars and cherimoya are delivered by land transport. Air freight such as okra from Ghana or Jordan are driven from the respective airport in Maastricht, Liège, or Paris to Venlo

able year-round producer. In addition, we also offer okra of Jordanian origin from the end of April over the summer months. In general, we have noticed that the item continues to be very popular."

In addition to okra, Asia GmbH is also dedicated to the year-round import and distribution of green beans, which are offered exclusively under the proven own brand Cleopattra. "Until a few years ago, we mainly purchased the Estefania variety, but then switched to the Faiza variety, which is comparatively darker rather than lighter green. We source our beans from Morocco almost all year round: there is only a production gap of about two months from the end of July, during which time we offer Spanish goods to bridge the gap. For about two weeks now, sales and prices have been trending downwards, but I would describe this as typical for the season," says Temiz.

30 YEARS IN THE IMPORT AND DISTRIBUTION OF EXOTIC FRUITS

Asia GmbH was founded in 1995 and thus celebrated its 30th anniversary on April 1 of this year. Over the past three decades, the company has established itself as a reliable partner of German wholesale markets for the import and distribution of selected exotics. In addition to the company headquarters in Krefeld, the specialized company has a distribution center at Fresh Park Venlo. Here, the freshly arrived goods are mostly handled, commissioned and delivered to the respective customer in the form of mixed pallets on the same day. Thanks to its proven business model, the company is well-prepared for the future. "I would like to venture into the online business at some point. But the time is not yet ripe for such a step," concludes Temiz.

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Germany remains dependent on imports for greenhouse vegetables despite soaring demand

AMI market researcher Michael Koch

The numbers speak clearly: German households love their vegetables. In 2024, tomatoes topped the charts at 13.6 kg per household, followed by cucumbers (11.6 kg), carrots (9.8 kg), onions (8.4 kg), and peppers (7.7 kg). Of these top crops, three are grown in greenhouses. With Germany's weather being the main challenge for growers, greenhouses are a logical option to cultivate certain crops and avoid seasonality. However, despite the ever-present demand and plenty of opportunities to tackle one of the biggest EU markets, domestic production covers only a fraction of this demand. Is it then possible for German greenhouse growers to step up and increase their self-sufficiency when it comes to greenhouse crops?

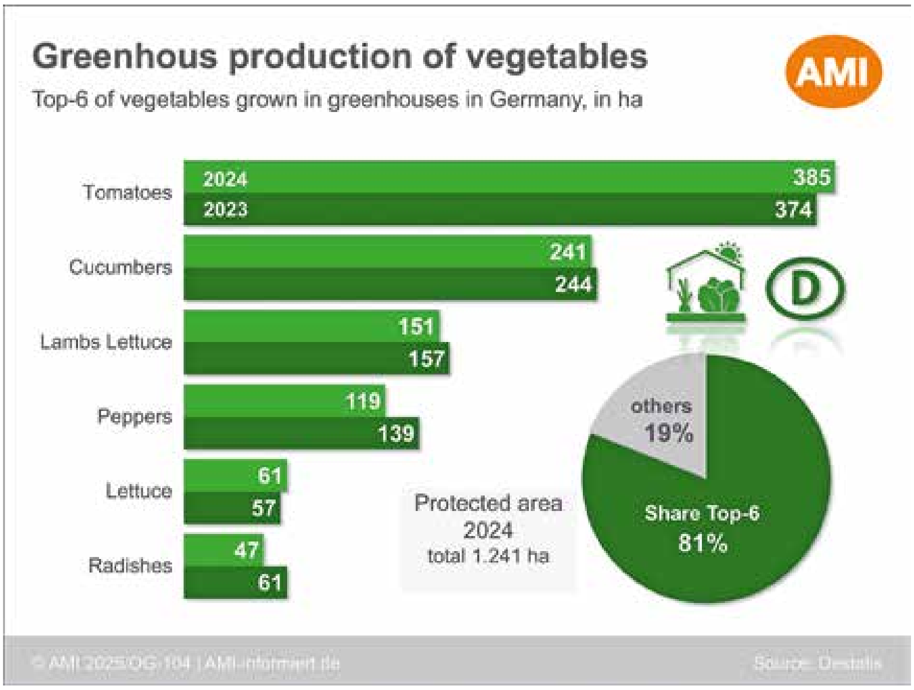
"Germany is not that big of a player in this space," says Michael Koch, head of horticulture at AMI. The Agrarmarkt Informations-Gesellschaft (AMI) serves as a key market intelligence provider, offering data and insights across the entire supply chain - from primary producers to retail and consumer behavior. "Local tomato production covers only 12% of the demand, which means that 88% is coming from imports. For cucumbers, we are looking at around 10% grown in Germany, with 90% imports. Peppers are even lower than that, with only 4% produced locally and 96% imported."

GERMAN FLAG ON PRODUCE

The first thing that comes to mind is whether there's any distinction between imported produce and locally produced goods in the market, to encourage German consumers to buy local. "German produce is clearly marked by a label - there's almost too much of that, even. There are some consumers who specifically look for locally grown vegetables, even if it's a bit more expensive." At the same time, this behavior clashes with the reality of the current situation. Michael points out that with the recent increase in food prices and the overall cost of living, consumers have become more price-sensitive. In other words, for the majority of consumers, it doesn't ultimately matter how many or which labels you put on a vegetable - price remains the main driver of purchasing habits.

There are differences between consumers in Germany and the UK, for instance, Michael says. He is very much aware that a UK flag label on produce would make consumers go for that - something that doesn't really work in Germany. "It also depends on how this difference is handled at the retail level, how stores market that. In Germany, everything is on the same shelf, local and imported. So, people are more inclined to decide based on price and not the German flag."

However, whether consumers get local or imported produce follows seasonal patterns. "During the winter months, imported produce is more expensive than during the summer," Michael points out. When local and foreign production overlap, there's not that much of a difference in prices. "Cucumbers, for instance, went for 1.80 euros per piece during January and February. This was roughly the same price for local and imported produce. If you look at summer 2024, consumers bought imported cucumbers for around 61 cents per piece, and it was 64 cents for German produce." This example shows that there's really no big gap in prices between local and imported produce in certain periods of the year. However, this also goes the other way around. "During March of this year, there was a significant price difference between local and imported tomatoes on the vine. Imported went for 2.20 euros per kg, and German ones went for 3.14 euros per kg." So while seasonality plays an important role in prices, there's also a certain degree of crop specificity that causes prices to go up or down.



STRAWBERRIES DRIVING CEA ADOPTION

Beyond the most consumed crops, there are other greenhouse crops that meet a higher demand percentage. "There's a split in the market for strawberries. Fifty percent of them are imported, fifty percent are produced locally. This is mainly because strawberries are still a seasonal crop in Germany. Some consumers then wait for the German ones, considering there's still a gap between the import season and the German season. For instance, right now, there are Spanish strawberries in the market, and in April, it's time for German strawberries. In a matter of two weeks, there's a complete switch in the market between imported and local strawberries."

Strawberries are a crop that is driving CEA adoption by growers, with open field production going down and greenhouses and plastic tunnels increasing. "Growers do this to increase the quality of the berries and improve work conditions for employees, allowing them to earn more money because of the shorter harvest times." There are, however, some factors that are slowing down the adoption rate of CEA, and labor is one of the main ones. "Right now, there's a shortage of labor coupled with rising costs due to minimum wage, which is currently under discussion to be raised even further - this is quite the challenge for the horticultural sector. Another factor slowing down CEA is the rising cost of steel and plastic resources needed to set up greenhouses and such."

On top of all that, there's the usual increase in costs coming from inputs such as fertilizers, fuels, and so on. "But there's also an issue with crop protection solutions," Michael remarks. "Germany has quite stringent regulations on this, and not many products are allowed. Unlike

other countries in the EU, where growers can use more crop protection solutions to defend their crops from pests and pathogens. It goes without saying that competing with that is extremely difficult for German growers. I believe there's a need for a univocal and harmonized crop protection regulatory framework for all growers in the EU to level the competitive playing field for everybody." On top of all this, there are climate change-related challenges that make this crop protection argument even more compelling. "Last year, we saw a sharp increase in the risk of fungal diseases and other types of pests. For instance, last fall, there was a huge problem in lettuce due to a big uptick in aphids caused by weather conditions and the lack of proper crop protection solutions available. This meant that big retailers had to switch to imported lettuce earlier, and German growers had fewer opportunities to market their product in the end."

Even though Germany is the biggest market in Europe for greenhouse-grown produce, most of it is imported, and local production will hardly be able to meet a large chunk of the demand in the coming years. "Compared to Spain or the Netherlands, the total hectares of protected cultivation in Germany is much, much smaller. In 2024, there were a total of around 1,240 hectares of protected cropping operations, with tomatoes leading at 385 hectares. I believe there's no way for Germany, say, in the next 4–5 years to become a big player in greenhouse crop production. Setting up a facility is too expensive, you need to find the right place, go through German bureaucracy, and so on. There were some plans for greenhouses to be set up, but none of them have materialized as far as I know, and it's still a question whether they even will in the next few years." With rampant climate change, however, there may be a slightly higher level of self-sufficiency for some crops, as weather may become more favorable. "There are opportunities in peppers, and some producers have been talking about eggplants - one of the crops where we could actually reach a higher rate of self-sufficiency. And who knows, if weather conditions improve, there may be a chance for sugar melons too," Michael concludes.

A producer tour in Nuremberg's Knoblauchsland

A high degree of professionalization and specialization characterizes greenhouse cultivation

For many years, the Knoblauchsland in the Nuremberg-Fürth-Erlangen city triangle has been known for its vegetable growing, with greenhouse cultivation in particular having gained significantly in importance over the past three decades. The numerous innovative horticultural businesses have a strong marketing and service partner in Franken-Gemüse eG, through which the regional, southern German and in some cases even the nationwide food retail sector is supplied. However, the ubiquitous topics of commercial horticulture do not bypass the Knoblauchsland region, as a local producer tour revealed.

With Franken-Gemüse Knoblauchsland eG and its associated Franken-Gemüse Vertriebs eG, founded in 2022, as well as Franken-Gemüse Bio eG, the approximately 40 member companies have a strong, centralized marketing and service partner with deep roots in the region. In 2023, the turnover of Vertriebs eG amounted to an impressive 140 million euros, with over 95 percent of this coming from the German food retailing sector. According to managing director Florian Wolz, the cooperative model is still successful in principle: "Unfortunately, we are still too often reduced to being a trader. However, a trader only buys what he needs, while a cooperative sells what the producers can produce. In this respect, the two models are fundamentally different." What primarily distinguishes Franken-Gemüse eG is the comprehensive range of services offered to producers from a single source. "From certification to private label packaging. We work on behalf of the producers," says Wolz, who celebrated his 20th anniversary with the company in 2024. To remain competitive in the future, a brand-new fresh produce warehouse is now being built opposite the current location, which is scheduled to open in the second half of the year. Wolz: "Our goal is to bring all our expertise together under one roof."

VIRUS PRESSURE AND ENERGY CRISIS

The energy crisis has also hit greenhouse cultivation hard in the Knoblauchsland region, confirms Simon Höfler, who has been growing mini cucumbers under light since 2021. "However, the increased energy costs have had a significant impact here. As long as we have good yields and prices, we can absorb these additional costs to a certain extent, but we did not manage to do so in the last year's season (2024). Admittedly, I wouldn't make the investment again in retrospect. When we invested in the lighting systems back then, gas prices were still relatively low, which is why the calculation was of course incomparable to the current situation," he says.

Willi Sippel also points out the effects of the energy crisis on planting schedules. "Until 2023, we always planted our tomatoes around calendar week 2, but due to the exponential rise in energy costs, we are currently only planting the crops in calendar week 4." Another factor that vegetable producers are confronted with is the Jordan virus. The virus pressure has led many producers to part with their proven varieties and to equip their facilities with new, resistant varieties last year. Sippel: "Unfortunately, we paid a high price in the first season after the changeover. There was a little of everything, from blossom end rot to bursting or undersized fruit. All in all, we had to accept a considerable loss, especially with the vine tomatoes (around three quarters of the total tomato production) because we had a yield that was around 15-20 percent lower per square meter at the end of the year. To spread the risks a little, we planted a little less vine tomatoes this year and a little more of other tomato varieties instead. Fortunately, in addition to the one main variety, we also tested a few other HR vine tomato varieties last year, one of which produced quite good results. We then planted these on a larger scale this year."

Simon Höfler

The regional outbreak of the dreaded tomato virus (ToBRFV) also caused the Höfler company great concern. "Fortunately, we have been spared the Jordan virus so far. We have considered equipping our plants with new, resistant varieties. However, the problem is that there is still no reasonable alternative for oxheart tomatoes, which are among our most important tomato crops in terms of quantity. We also continue to rely on the proven varieties for our cherry and grape tomatoes due to a lack of alternatives. For vine tomatoes, we have already switched to HR varieties for the 2024 season, but yields are significantly lower than those of the tried and tested varieties," the tomato producer sums up.

RANGE EXPANSION AND SPECIALIZATION

Cucumbers, tomatoes and sweet peppers are still among the most popular and most widely consumed greenhouse crops. However, the glasshouse horticulture businesses in the Franconian triangle are not afraid of innovation. For example, the Höfler family has been producing fresh ginger for five years now. Höfler: "After we had determined the marketing potential for regional ginger at the wholesale market, production was increased relatively quickly. However, it turned out that crop rotation is quite

The Häring couple

Willi Sippel

challenging, i.e., if the same area is planted several times, the yield drops noticeably. Of the original food retail customers who listed our products, unfortunately only one remains, and they have significantly reduced their tonnage." This already led to a situation last year in which produce had to be disposed of in the end. "Accordingly, we have decided to reduce our cultivation capacity this year from around 0.7 to about half."

Other colleagues, on the other hand, rely on a few selected crops, such as the Ruff-Häring family. For three years now, the company has been growing radishes year-round. "We have now found a great market niche," says co-managing director Stefanie Häring. "Nevertheless, radish sales were relatively weak last winter, especially in food retailing. However, given the fact that we don't even have half the amount in winter that we do in summer, it was quite a good fit." The first advertising campaigns for radishes usually don't start until the beginning of the outdoor season in April, Häring continues.

Josef Peck, CEO of LGV Sonnengemüse e.G.:

"We want to increase the variety of products again in the coming years"

In the greenhouses of LGV Sonnengemüse, Austria's leading producer cooperative, the new harvest got off to a slightly delayed start this year. "The sunshine in January and February was significantly lower this year than the annual average. This set us back by about a week. Last year, 2024, we also had a delayed start to the harvest, but this was due less to the weather and more to the energy crisis. Many producers felt compelled to postpone planting schedules to save energy costs. This year, we would have been at the market earlier if the weather had played along," reports Josef Peck, sole director of the company.

Traditionally, cucumbers mark the start of the season for domestic fruit vegetables. "The first cucumbers and mini cucumbers were harvested and marketed in calendar weeks 7–8. Despite the lower amounts of light, the produce so far has been of outstanding quality, so we don't see any problems across the range." According to Peck, the marketing of greenhouse crops has also got off to a pleasing start. "Promotions in the retail sector have been taking place since the beginning of the season and, in my opinion, have increased further. In addition, for several years we have noticed that the timing of promotions tends to be set earlier. No sooner has the season begun than the first chains want to start their promotions. This is understandable, as early promotions work much better than those in the peak season. This presents us with major challenges in terms of logistics, as the required quantities are sometimes barely available. So far, we are still in a situation in which everything that is harvested is delivered immediately, with hardly any stock or reserves. During Easter week, the already strong demand is further boosted by the effect of increased advertising."

Meanwhile, heavy rainfall in the Spanish vegetable garden of Almeria has led to an overall supply shortage. Peck: "At Fruit Logistica, we already received numerous inquiries from the trading side whether we would be able to start with sweet peppers on time because there have been weather-related failures in Spain. Apart from this year's volume losses in Spain, which have been felt throughout the entire fruit vegetable category, we have noticed that the retail sector immediately switches to Austrian domestic produce as soon as it hits the market. No one wants to import produce longer than necessary, so demand is already high at the beginning of the season. Nevertheless,

Josef Peck, Sole board member of LGV Sonnengemüse the missing volumes in the first phase of the season must continue to be covered by imports. The respective retail chains usually handle this themselves."

FOCUS REMAINS ON ENTRY-LEVEL PRODUCTS

The current prices are fine across the board and have risen moderately compared to the previous year. "We can produce properly at these prices and cover our costs accordingly. Currently, we are not seeing any price anomalies, neither upwards nor downwards. Meanwhile, we are seeing that the focus remains on standard products, which in turn is due to inflation and increased price sensitivity among consumers. Nevertheless, we are now testing new, special varieties again for the first time in a few years. We intend to ramp up this product diversity again in the coming years."


"Cucumber remains by far our strongest product," says Peck

SUSTAINABLE PRODUCTION & VIRUS-RESISTANT TOMATO VARIETIES

LGV Sonnengemüse was established in its current form in 2019, following the merger of the two producer organizations LGV and SSG. The company markets the products of around 130 member companies in Vienna, Lower Austria and Burgenland. "About 75 percent of our total sales now come from the fruit vegetables category, and the trend is rising. Specifically, the cucumber is still by far our strongest article, followed by tomatoes and sweet peppers," says Peck, who has been at the helm of the cooperative for five years now as sole director.

There have been no significant increases in area or capacity in greenhouse cultivation in recent years, which is mainly due to the multiple crises. Nevertheless, the groundbreaking ceremony for a flagship project at the Viennese tomato company Merschl took place recently. "This is Austria's first biomass heating plant with Carbon Capture and Use, in other words, a CO_2 separation plant. This system can be used to scrub CO_2 out of the exhaust gas and feed it back into the production process, which will ultimately make a significant contribution to sustainable vegetable production." Alongside the opening this fall, the company is also planning to open a new greenhouse facility. In the future, LGV Sonnengemüse plans to build additional biomass heating plants with CO_2 separation to become less dependent on gas and to be able to produce sustainably.

In recent years, the tomato production in particular has been severely affected by the Jordan virus (ToBRFV) in several renowned horticultural areas. "Fortunately, the virus did not impact us. Our tomato producers are well on their way to switching to virus-resistant varieties, and the risk has now been reduced. For most standard varieties, there are already HR alternatives that have consistently shown good results in cultivation."

Despite advanced technology, the course of the season in the greenhouse is always good for a surprise. "During the summer holidays, we usually observe a certain saturation, which is why we then initiate actions from our side to cope with the existing harvest volumes accordingly. The season typically ends in late fall, although last year's flood disaster in Austria brought the season to an abrupt end. This had different effects on the crops, but we had to end our cucumber harvest two weeks earlier than usual. We hope that we will be spared such circumstances this year. Over the years, however, tomatoes have tended to grow longer, and we now have some growers who can harvest smaller quantities well into December."

LACK OF YIELD SECURITY CHARACTERIZES GINGER CULTIVATION

Even if the focus currently lies less on the cultivation of special crops, LGV Sonnengemüse was one of the pioneers here. "In 2018, we were one of the first to offer fresh ginger from protected cultivation. However, a major disadvantage of this crop is that the soil temperature has to be kept above 15 degrees for six months of the year, which unfortunately we don't always manage. We would have the option of further increasing production if there were a certain yield security. There have certainly been good years, but there have also been years in which yields were very low, and cultivation did not cover costs. Nevertheless, it remains an interesting product that has been very well received by food retailers and consumers alike."

Overall, the cooperative's management is looking ahead positively. "Demand for our vegetables is good and continues to grow. So we're not worried about sales. Our main task in the coming years will continue to be securing and expanding production. Looking at developments within the cooperative, the number of member companies will probably not increase, but decline slightly. As a rule, companies that cease operations are taken over, and we are also seeing a growing willingness among horticultural businesses to make investments. In particular, in the horticultural area of Simmering, we see many younger business owners who want to take over their parents' business because it has been possible to make a good living from it in recent years. I therefore expect things to start moving again in the next two to three years," he concludes.

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Savéol, France

How to stay competitive when faced with foreign tomato imports

The French tomato covers 60% of French consumer's needs. This means there is an important production shortage in relation to domestic market demand, which makes it necessary to resort to imports in certain periods of the year. Facing highly competitive production and labor costs abroad, Savéol - one of the main players in French tomato production – wonders which strategy to adopt in order to retain a prime position on supermarket shelves. Pierre-Yves Jestin, President of Savéol, reveals some of the answers.

A key pillar of the cooperative's strategy is to continuously develop and supply a wide range of tomato varieties: "Today, there aren't many brands that are as popular as the Savéol brand. Consumers are really attached to it and seem to have identified it very well. We make the difference by fine-tuning our varieties and introduction management. Each year, we reorganize the tomato crops in our greenhouses and determine the volume needed in each segment. These regular readjustments enable us to move into profitable market segments and respond as effectively as possible to changing market needs and so that growers can reinvest and make a decent living from their work". With a tomato mix of over

30 varieties, Savéol is one of the French growers with the most extensive range of tomatoes on the market. The selection of varieties is always made while keeping taste and quality in mind: "we don't compromise on quality and taste, which sets us apart in the market".

PROMOTING GROWERS' KNOW-HOW

Taste has been the driving force behind the diversification of Savéol's offer, yet promoting and enhancing the work of its growers is another key point in its brand's positioning: "Over the last 7-8 years, we have reached a plateau in terms of production in France. Volumes have not increased, and the development of tomato plantations is limited. The extensive communication around organic farming has prompted us to rethink the positioning of our products. We were pioneers in the development of the Pesticide-Free label, and the first to highlight the work and know-how of our producers in prevention and sanitary management, which has led to a drastic reduction in the use of the much-discussed phytosanitary products".

INNOVATIVE PACKAGING

Savéol once again won the title to be called "France's Favourite Brand" this year. This is also due to the brand success in making its way into consumers' kitchens: "our packaging brings our brand into the heart of French households. Our cherry tomatoes for example - a segment that has grown rapidly over the past 30 years and in which we were pioneers - have found their place in innovative packaging for aperitifs. For the past 2-3 years, we've been taking inspiration from the key events of the year to offer specific, attractive packaging. Last year, we winked at the Olympic Games with packaging created especially for the occasion. Valentine's Day, back-to-school or the start of the new season are all events that allow us to offer a fun and differentiating packaging that fits into consumers' homes".

SALES SUPPORT

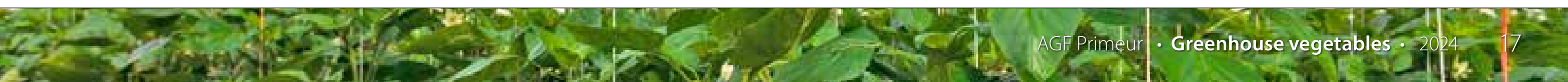
To access the consumer's kitchen, you need to convince them when they're shopping. Therefore it's essential to have a professional team actively supporting the stores: "we need sales reps and animators who are out in the field, bringing the shelves to life to convince customers throughout the season. Participating in product showcases certain times of the year, anticipating the seasonal variations and assisting department managers in setting up tastings are all services that enable our customers to increase their sales and, at the same time, orient the shopper towards French tomatoes. This sales support is a real strength compared with foreign products, which do not come with this kind of service. With the French production falling short, this is one of the strategies we need to deploy to capture shares in segments we did not supply before.

JOINING FORCES TO OFFER A COMPETITIVE FRENCH PRODUCT

Offering a diversified range of tomatoes in differentiated packaging and a wide variety of formats (bulk, 250g shell, 1kg trays, etc.) makes it possible to reach a wider range of consumers in terms of taste and price. To increase the competitiveness and visibility of the national cherry tomato sector Savéol is participating, via the DPO Tomates et Concombres de France, in the launch of a 250g packaging designed to promote the French origin: "the idea is to promote the French cherry tomato in one unique package and to optimize costs. We want to promote the distribution of French cherry tomatoes and make them more competitive and attractive than other origins, even if the price is lightly higher due to the costs of French production".

GREENHOUSE PRODUCTION TO REGAIN FRENCH FOOD SOVEREIGNTY?

"In today's uncertain geopolitical climate and looking ahead, our food sovereignty is vital. Climate change makes open-field cultivation very complicated, since it is subject to extreme climate episodes. However, I am convinced that we can achieve this first priority goal, thanks to the mild climate we have in France, compared with certain other regions of the world. The greenhouse, benefiting from a controlled environment and with easier sanitary and climatic management, will certainly be a tool we need to ensure this sovereignty".



Rijk Zwaan scales up with new snack pepper brand:

"You must tell a story"

When kids ask their parents to replace their school lunch apples with special bell peppers, you are doing something right as a breeding company. Rijk Zwaan developed Tatayoyo, a brand of sweet pepper that is distinctive because of its shape but, especially, because of its flavor. This year will see the major rollout in European retail.

Tatayoyo is not brand new. In 2023, Rijk Zwaan won the Fruit Logistica Innovation Award with these large ready-to-eat snack peppers. Its unique flavor sensation stood out. That was also when they had a proper market introduction, recalls Heleen van Rijn-Wassenaar. She is the Melon & Pepper Marketing Specialist at this Dutch breeding company, which operates worldwide.

"We started small with the market introduction. We wanted to learn from the market and see how the brand was received," Heleen begins. The first two most important customers were retailers in Germany and Canada. Rijk Zwaan opted for a retail-driven introduction. "Unlike with bell peppers, where you look at which grower wants to grow a variety, here we considered which retailer was interested in this new concept."

In Canada, Loblaws showed interest; in Germany, it was REWE. Seed was supplied to growers in North America and Europe for production. In North America, it is grown in Mexico, the United States, and Canada; in Europe, the Netherlands and Spain. "When we come up with a new idea, immediate year-round production is vital for us. You can then run a year-round program at retailers and, once introduced, consumers will see the product on the shelves all year long," says Heleen. Neither Europe nor North America has winter cultivation, so there would be a gap in both regions. "Then you have to start all over again every year."

SCALING UP

Thus, 2024 was the year of scaling up. An organic grower in Austria started growing Tatayoyo, Rijk Zwaan started a project with retailer Mega Image in Romania, and they accessed the Chinese market, after a retailer showed interest. Last winter, the company scaled up again after a new German retailer showed interest. "We couldn't have done it any faster because we had to get seeds," Heleen continues.

"Based on the great interest we saw, we quickly increased seed production. That lets us expand further." Several Spanish growers grew Mitayo RZ last winter, which is the variety behind the Tatayoyo brand. This summer, two new Dutch growers joined the first one. "There are already a few hectares in the Netherlands. The snack peppers go to places like REWE and now also the other German retailer via trading houses in the Netherlands and Spain," van Rijn-Wassenaar says.

As mentioned, the brand is based on the Mitayo RZ variety. "We developed that in our high-tech pepper breeding project. The next step is to design a variety specifically for protected (unheated) cultivation. Good resistance to colder nights, for example, is important." Heleen points out that the current variety is doing well in both northwestern and southern European climates, which is extraordinary.

"We knew that, and because we could grow year-round, we could introduce the brand using a single variety. What we're doing in Spain can also be done in Mexico, where there are also high- as well as mid-tech greenhouses. Mitayo RZ is doing well globally; it's a vigorous grower," she says.

19 UNIQUE FLAVORS

Years of breeding went into developing the Tatayoyo brand. "Flavor is the main goal. Once we find that new, special flavor, we look at how to make the variety as recognizable as possible in stores. You could cross that unique flavor into a bell pepper, but those are indistinguishable. That's why we chose a size between a snack and bell pepper." A regular snack pepper weighs 30-45 grams, the Tatayoyo, 40 to 80. They selected orange as the color. "You don't see that very often on store shelves, and that helps make an innovation recognizable," Heleen continues.

You start with a distinctive fruit, but it does not end there. Rijk Zwaan, which had already successfully introduced the Sweet Palermo sweet pointed pepper brand, knows better than most what it takes to build a brand around a new innovation. "You still need plenty of communication, even with a genuinely distinctive product. You have to tell a story. Otherwise, the people can't see that a product is different."

While building the Tatayoyo brand, the flavor characteristics of this special snack pepper were considered. "It tastes sweet and a bit tropical but also savory and aromatic. We did a lot of flavor analysis, including biochemical analysis. We look at the product's flavor components. Tatayoyo has a truly different aroma from regular bell peppers. That's due to a special combination of volatile substances. Tatayoyo has 19 you won't find in other peppers. It smells somewhat similar to the aroma in wines such as Chardonnay, but with a hint of tropical fruit," Heleen points out.

Rijk Zwaan had noticed that, in the market, people, especially kids, already loved this prize-winning brand. "They think it tastes great. That's unusual because children don't always like bell peppers. They do like Tatayoyo, though. We regularly hear stories from people whose kids, once they have tasted one, would rather have Tatayoyo in their lunchbox than an apple. And we say, ‚Eat it like an apple'. Plus, Tatayoyo is packed with vitamin C."

FEW GREENHOUSE VEGETABLE BRANDS

Remarkably, this breeding company has successfully introduced several brands in the greenhouse vegetable landscape. Growing things like tomatoes and bell peppers is about high-volume cultivation and European retailers prefer selling products under private labels rather than brand names. Heleen admits it is challenging to introduce a brand as a breeding company. "We don't grow, package, trade, or sell the product," she explains.

"Using the brand must boost sales, and people want something in return. We help with shelf introduction and brand promotion. The challenge is to consistently convey the same message. The

Sweet Palermo

Rijk Zwaan won the Fruit Logistica Innovation Award 2023 with Tatayoyo

product being up-to-scratch must be the foundation for that. For Tatayoyo, a catchy, funny, playful name helps. You must create an experience, too, and then ensure you support growers, traders, and retailers in marketing the brand. So, we do point-of-sale promotions along with retailers."

Introducing a brand to the market is not Rijk Zwaan's goal, the Pepper Marketing Specialist says. "Ultimately, it's about introducing new varieties and concepts. If something is truly distinctive, if you have something the competition doesn't, you can build a brand around it. That way, you can show what you have is wholly distinctive," she points out.

Sweet Palermo is now a brand in the sweet pointed pepper market, which is no longer a specialty market in Europe. More than ten years after its introduction, it has become a commodity as consumers increasingly discovered sweet pointed peppers. Yet the brand is holding its own. "If you succeed, you'll face competition. Even then, it's vital to keep distinguishing yourself with a brand."

POSITIVE RECEPTION

Recognizing innovations, like Tatayoyo getting the innovation award at Fruit Logistica in Berlin in 2023 and the International Taste Quality Institute's recognition, helps. That institute gave Tatayoyo the maximum 3 stars as early as 2021 when the product was not yet commercially available. "We got that last year again. And in Romania, Tatayoyo won the Best New Produce Award," says Heleen.

You will not (yet) find Tatayoyo in Dutch supermarkets. However, the Mitayo RZ variety is listed in the Trial Center High Tech among all of Rijk Zwaan's other flagship varieties and, thus, in various greenhouse growers in the Netherlands. A small project has also been started with a Belgian organic grower. "The two new Dutch growers will cultivate this product for a German retailer and will send samples to other retailers. That helps to make the product better known and create demand."

The recent years' high inflation rate has been challenging. "That makes introducing innovations difficult. But if you have something truly special, there's always a market for it. We've been delighted with the introduction of our products in recent years and have already exceeded our targets. With the experience we now have and Tatayoyo's positive market reception, it's a go for further seed production increases. It's tricky because you must do that a year or two in advance. If things go well, you want to have enough seeds to scale up,' Heleen concludes.

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Hazera:

"We want to enrich the healthy snack segment with colorful and milder radishes"

Want to brighten up a salad with a fresh flavor? Add crunchy radish. The contrast between its red skin and white flesh also adds a pop of color to that summer dish. But, not everyone is a fan: for some, radishes taste too sharp. That calls for input from breeders who are busy developing milder varieties. And white, purple, and striped radishes? Yes, there is something for everyone.

Radish, a member of the cruciferous family (cauliflower, broccoli, Brussels sprouts, etc.), originated in Asia. It has been found in European vegetable gardens as far back as Roman times. Besides the well-known round, red radish, scientific name, Raphanus Sativus var. Sativus, the genus includes the larger, milder daikon and black radish.

Red radish is more popular in the West, so breeder Hazera focuses on this species to boost the slowly increasing consumption with a wider range of flavors and colors. Its indoor and outdoor cultivation radish program has been one of the most important spearheads in this Dutch company's R&D programs for more than 40 years. The breeding program also considers the challenges growers face. In this article, global product manager Adam Prabucki and sales manager Dirk-Jan Polak delve into that.

YOUNGSTERS ARE GETTING INVOLVED

"The global radish market's annual growth is slow but steady, "begins Adam. "Red radishes make up almost 99% of the supply, but it's the colorful varieties that

New varieties are compared with current standard varieties on the trial field

seem to be sparking interest as exotic products. It used to be the older generation that ate radishes; now, it looks like young people are being drawn to them too. One of our breeders recently told us he dreams that eventually, radishes will become the healthy snack of choice."

Adam says radish is not only tasty and fresh but also very healthy. "A hundred grams provides 25% of your daily Vitamin C requirement. Healthy snacks are generally gaining increasing attention, and radish can piggyback on that trend," he explains. Dirk-Jan agrees, adding that while bushel sales are stagnating, loose radishes sales as an on-the-go product are rising. "You can combine those with other products, like baby carrots. Our sister company, Vilmorin, has developed a very sweet variety, which was recently voted the tastiest snack carrot of the year. You can find 200g bags of those and our radishes on store shelves already," he says.

THE GOAL: A CHOICE BETWEEN MILD AND SHARP

Dirk-Jan notes that when it comes to radishes, consumers are divided between those who love its sharp taste and those who, because of that, avoid them. "But we can undoubtedly use milder varieties - and a color trigger - to convince the latter. Radishes can often dominate a salad with its flavor; not everyone likes that. We have a long-term goal of perhaps breeding milder varieties, so consumers can ultimately consciously choose between sharp and mild."

That flavor, though, is not entirely variety-dependent. Growers and weather conditions also affect that. Until now, radishes' mustard oil content predominantly determined its flavor. The sunnier, the more of that oil the radish produces. "Radishes are generally less sharp in winter than in warmer months. But this summer, with Zonella F1, we're introducing a variety that, for the first time, bucks that trend," Adam announces. Zonella F1 stays nice and white on the inside, growing to a shorter length than the existing standard.

Hazera's top European markets for its hybrid varieties are the Netherlands and Italy for greenhouse cultivation and Germany, Poland, and the United Kingdom for outdoor cultivation. Outside of Europe, the focus is on the US. "There are an unusually large number of greenhouse projects in many parts of the world, so the share of hybrid varieties is increasing. That's good for higher average yields, a more uniform product, and better internal quality," says the product manager.

EXTREME WEATHER TOLERANCE

Adam finds several characteristics determine a variety's success. Along with those already mentioned - yield, uniformity, and internal quality - he mentions good skin quality - "the color shouldn't

A mix of red, white, and purple radishes: the latest trend that appeals to a younger audience

Radishes are evaluated based on a variety of characteristics, with the inside being just as important as the outside

fade after washing" – and tolerance to cracking in the field.

That tolerance is closely related to the ever-increasing frequency of extreme weather. "Extreme weather conditions mean more than merely hot or wet. It could be a heat wave that suddenly turns into persistent rain that floods fields. We're thus looking for tolerances for drought, heat, and wet conditions. Climate change is also why protected cultivation, including radishes, is on the rise, from Kazakhstan to Europe to Canada. You can easily grow radishes year-round in controlled conditions, even in vertical farms with sophisticated light recipes and at a constant 18°C. Here too, there's a role for plant breeders; this type of cultivation requires specially adapted varieties," Adam continues.

In Europe, energy costs, especially gas, play a major role in greenhouse cultivation. As does social pressure to keep CO2 emissions as low as possible. The demand for winter varieties that have the same yields and quality traits at slightly colder temperatures is, therefore, on the rise. "We had to look for vigorous varieties with strong foliage. But we couldn't go overboard because 50 cm-high leaves make mechanical harvesting impossible."

MECHANICAL HARVESTING

Breeders have to constantly balance one requirement and another. "In the Netherlands, most radish acreage is harvested by machine, both for efficiency and to escape rising labor costs. In breeding, the focus should be on varieties with straight, not-too-long, but also not-too-short leaves. That's because the machine uses those leaves to pull the radish from the ground. Especially in the Dutch winter, those leaves can have difficulty developing sufficiently. In the summer, the reverse threatens to occur: the foliage grows too quickly and strongly. Growers look to the breeding sector for answers to those challenges," Adam points out.

Breeders also include the sustainability aspect in their programs. "Not long ago, a vital active component for seed treatment's registration was withdrawn. So, for several years now, we've been doing trials with third parties on an organic application, with already promising results. But its registration goes through the same process as crop protection products, so its commercial rollout will take a while."

VARIETAL INNOVATION INSTEAD OF CHEMICALS

Regarding crop protection in general, legislation, particularly in the EU, is restrictive, while diseases and pests are becoming increasingly common. And where chemicals are no longer the solution, varietal innovation quickly comes into the picture. "Pathogens are, of course, timeless, though," Adam remarks. "Some 30 years ago, we introduced the first Fusarium-resistant radish for Dutch greenhouse horticulture: Favorella."

"For outdoor cultivation, we developed a variety resistant to downy mildew, and we helped growers in the American Midwest with a variety unaffected by Rhizoctonia outbreaks. The next big challenge, especially in Europe, is white rust water mold. But remember: you can't pull solutions out of thin air. It takes 18 to 20 years to develop a new radish variety. That's going to keep me busy until I retire," Adam concludes, laughing.

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Vine tomatoes under the Natura private label from P. Solleveld Export

Annemieke Hendrix-Koot, P. Solleveld Export

A total package delivered every day to German clients, large and small

"When a Tik-Tok clip or late-night TV chef surprises everyone with a little-known exotic fruit, you can be sure that the next morning clients will call wanting to know if we carry that product," begins Annemieke Hendrix-Koot of the Dutch company P. Solleveld Export. "A while ago, we were talking about Lemon Snacks. Two weeks later, we had a program up and running with a supplier. These are the things that make our job so much fun." There is no shortage of exotic products in this exporter's transshipment warehouse in the Netherlands. It, though, is best known, especially in Germany, for its range of Dutch greenhouse vegetables under its Natura brand.

Whether it is assembling pallets with various products or full loads of a single kind of vegetable, this medium-sized fresh produce export company does it all. Its trucks go back and forth to Germany every day, and by using certain transport companies, they serve more distant places, too, like Austria, Scandinavia, and Portugal. From its office and warehouse in the Netherlands, the staff ensures that sourcing, sales, and order picking runs smoothly.

TOTAL PACKAGE

Annemieke has been with P. Solleveld for 12 years but worked in the fresh produce sector before that. "I always say I can't do anything else. All jokes aside, this business' fast pace is addictive," she says. The exporter's formula for success has remained the same for years: offer a total package to a broad mix of customers. "Clients can place their entire order with a single call to us. We deliver to wholesale markets, supermarket suppliers, restaurants, and commercial kitchens. If things are a little slower in one sector, another segment absorbs the decreased volume."

"That's how we got through the pandemic unscathed. The buyers who supplied restaurants and hotels disappeared or ordered considerably less, but supermarket customers started ordering more." They take good care of both large and small customers. The company makes customized purchases and can, thus, provide all its clients with a varied product range. "We'll even help buyers who order only 10 or 20 boxes," says Annemieke.

OWN FLEET

P. Solleveld's trucks cross the Dutch border into Germany every day to destinations from Bonn to Hamburg. "We use transport companies for places that a little further away, such as the Berlin or Frankfurt area. Our drivers aren't allowed to travel to and from there on the same day. That has the added advantage that we don't have to find cargo for the return journey. Our vehicles coming from Germany pick up products from growers and growers' associations that need to be in our warehouse the following day. Having our own fleet is undoubtedly also why buyers remain loyal to us."

According to Annemieke, the labor market's general driver shortage has not yet been too problematic for P. Solleveld, unlike many other exporters and carriers. "All our drivers have been with us for several years, some for 25+. But it's tough to find young people who want full-time jobs. Fortunately, we currently have a good team, both in the office and warehouse," she explains.

DUTCH GREENHOUSE VEGETABLES

Warehouse staff has been handling the new crop of Dutch bell peppers since mid-March and TOVs since early April. Those are sold under the Natura brand. "As soon as that becomes available, several customers switch from Spanish to Dutch products, especially due to our brand's guaranteed quality. This year, perhaps even somewhat sooner than usual, given the quality issues the rainfall caused in Spain in February and March."

The general shortage of drivers in the labor market has not yet posed any problems for P. Solleveld

A few regular growers package those tomatoes and bell peppers in Natura boxes in their greenhouses. "This method guarantees a uniform product. However, we don't sell a grower's whole crop. If we did, we'd have to be able to sell all of their grades and sizes, and we no longer have that customer base. Some clients used to be willing to accept a pallet of grade II produce for €2 less, but they all want good quality now. Consumers have become pickier," says Hendrix-Koot.

Since 2022/2023, when gas prices plunged Dutch greenhouses into darkness, P. Solleveld also no longer offers truss tomatoes grown under lights under its Natura brand. “There’s not been enough product available for this in the past two winters either. Almost the entire acreage is in programs with the large supermarket chains. But we do buy products like cucumbers, eggplants, and zucchini from various growers and at auction. We don’t market those under the Natura quality label, which has a condition meeting uniformity requirements.”

LITTLE COMPETITION SO FAR

Despite competition from local growers, Turkish imports, and Polish supplies, Dutch exporters are holding their own on the German market. “Cucumber cultivation is highly developed in Germany, but they still buy all their tomatoes from the Netherlands. The wide variety of types and packaging certainly benefits Dutch growers. From Poland, there’s mainly pressure in the mushroom segment. And in winter, the many Turkish wholesalers prefer Turkish bell peppers and tomatoes. They’re a little biased,” Annemieke reckons.

“German cucumber cultivation is highly developed, but they still buy Dutch tomatoes.”

The export company suffered a major blow 36 months ago when Piet Solleveld passed away. He had been at the company’s helm for 54 years. The new management team, however, did not become demotivated. “It took some soul-searching because the man who’d firmly steer us in a certain direction was no longer there. Nevertheless, we managed to stay the course. The world hasn’t stood still recently, so we’ve also begun using terms like innovation and change.”

“No major changes, of course, just small steps. In the background, we’re looking for chances to innovate in various areas. For example, we’re currently looking at how to use social media. Standing still means going backward. Yet, some customers still write out their orders by hand, take a photo, and send it to us via WhatsApp. So there’s some technology involved. Only in Germany!’ Annemieke concludes, laughing.

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“Our auction strategy gets higher bell pepper prices”

Marcel Biemans

Coöperatie Hoogstraten lies just over the Dutch border in Belgium. When it comes to bell peppers, though, that short distance makes a world of difference. The acreage in the Netherlands is the largest by far for these two countries, but bell peppers fetch higher prices at Hoogstraten. The company highlights that they have recently seen an increase in demand for this product, while some growers have stopped cultivating it. That means the folks at Hoogstraten need additional supply, for which they are firstly looking toward Belgium’s northern neighbors, a region where many growers are not affiliated with a cooperative.

“We have a compelling story, one we haven’t shared often enough in recent years,” begins Marcel Biemans, Coöperatie Hoogstraten’s Grower Development Manager. You can safely leave it to the Dutch people within the cooperative to make a bit more noise, he adds with a wink. “We want to promote the idea of ‚be good and tell it’ more actively. We’ve been somewhat too modest regarding grower acquisition.”

With a clear view of the future, Hoogstraten chose, a few years ago, to focus more on strawberries, tomatoes, and bell peppers. This cooperative has always been strong in strawberries and has a solid position in tomatoes with several strong growers on board. Bell peppers have recently proven more difficult. “We had some growers who cultivated these but stopped. The acreage has, thus, decreased while demand keeps rising," says Marcel. Most of their bell peppers go to Belgium, France, and the United Kingdom. "Those are our most important markets."

CENTRALIZED SORTING

That stoppage means supply and demand are not entirely balanced, regarding the different colors too. "We grow the most green bell peppers," Marcel explains. With a new Dutch grower's arrival, more red peppers were added this year. "We partnered with Oxin Growers for that. This grower will now sell some of his red peppers to us. It's a win-win for both parties. We're open to such collaborations and want to expand with growers outside the Netherlands, too, though our main focus is on our northern neighbors."

Coöperatie Hoogstraten currently has about 100 hectares under bell peppers. "Our greenhouse vegetable sales manager, Bart van Bael, however, says there's room for at least 200 hectares, given the high demand," Marcel continues. Presently, two-thirds of the cooperative's bell peppers come from Dutch growers, the rest from Belgian growers.

The company offers centralized sorting. Both large and small growers use this service for all or part of their acreage. Marcel mentions, as an example, a couple of growers who switched to bell peppers from tomato cultivation in recent years. "For those tomato growers (3.5 and 9 ha), switching to a different crop was already a big deal. We could help by doing their sorting. Our sorting system is flexible, so we can fulfill customer requests and quickly switch to specific packaging. Lately, we've seen that it also benefits our prices. Also, our growers don't have to purchase too many different types of packaging themselves."

Bart van Bael

SIMILARITIES TO STRAWBERRIES

Other Hoogstraten products often go to Germany too; less so, their bell peppers. "Other parties with more acreage sell more volume on the German market. Our bell peppers also go there, but it's certainly not our top sales market," says Biemans. Unlike sellers in the Netherlands, Belgian sellers sort and market the bell peppers by size, not weight, he explains. "We serve specific markets and focus less on traffic light packs. We also sell more loose bell peppers."

A particular strength of this cooperative's bell pepper marketing tale resembles that of strawberries, where Hoogstraten is most well-known. "In our conversations with Dutch growers, we learn we're not yet that well known in the bell pepper sector, neither is our working method," Marcel points out. To change that, the cooperative invites growers to a special bell pepper day on May 3.

It also actively wants to talk to individual growers. "Just as with strawberries, the auction clock plays a central role. With bell peppers, too, most of the volume is sold via auction. We base our pricing on that. They did benchmarking last year, and our prices look good. Our bell pepper prices were significantly higher than those of Dutch trading companies. With our auction strategy, we get better market prices."

Coöperatie Hoogstraten has specialized snack pepper growers too. However, those are deliberately kept separate from the bell peppers. The growers supplying snack peppers flexibly scale their production to meet market demand.

"That snack segment is growing, as are snack tomatoes and cucumbers." The company is not (yet) focusing on pointed peppers or organic cultivation. "We can supply organic products and are certified, but our current focus is on conventional cultivation," Marcel admits.

LOWER COSTS, HIGHER PRICES

Bell pepper growers have recently faced several challenges regarding cultivation methods, and Hoogstraten Cooperative helps deal with those as best they can. Here, the close cooperation with the Hoogstraten Research Center (which announced its merger with the Vegetable Research Center on January 1, 2026, ed.) is very useful. "The research focuses on practical solutions that genuinely help growers move forward."

A good example of this collaboration is the introduction of UV-C robots, albeit in strawberry cultivation. "Growers were having issues with mildew. Together with them and the Proefcentrum, we invested in research. Today, our growers use more than 30 of these robots," Marcel continues.

This investment in robotics was partly thanks to a GMO/SIG&F subsidy. Here, too, Marcel notes a difference between the Netherlands and Belgium. "This regulation has a slightly different impact. In the Netherlands, the focus is more on investments. In Belgium, we also focus on cost reduction for the grower. That allows us to ensure growers can deliver cost-neutrally or even negatively from a certain level of sales. Lower costs and higher payout prices mean we can realize nice gains for our growers," Marcel concludes.

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Unjustified fear of supplying Belgium

Coöperatie Hoogstraten wants to expand its bell pepper acreage and is specifically looking to Dutch growers for this. In discussions on this topic, Marcel Biemans, Grower Development Manager at Coöperatie Hoogstraten, often hears these ‚myths' about supplying to Belgium that he happily refutes.

Supplying to Belgium is (too) costly

"Even if you include transport costs in the price, there's no such thing as free transport."

"Our transparent calculation model proves the opposite; we'd love to explain."

The way Belgian sales work is tricky for Dutch growers

"That two-thirds of Hoogstraten's bell peppers already come from the Netherlands shows that Belgian quality standards are no problem."

"Oxin Growers' new Dutch grower started smoothly despite the new way of working."

The Belgian culture is (too) different from mine

"Coöperatie Hoogstraten is Belgium's most Dutch cooperative."

"Let's talk; we're eager to dispel those prejudices."

One of the lettuce resistances that Enza Zaden focuses on is the fungal disease Bremia

Lettuce: climate change and fewer crop protection products shift focus to resistance

"Growers are very concerned about the climate and shrinking crop protection product range," begins Paul Huijs, Leafy Vegetables Product Manager at Dutch breeder Enza Zaden. "You can use breeding, which we're investing heavily in, to respond to some diseases. We hope to combat as many diseases as possible with resistances."

Enza Zaden is, for example, working hard on an iceberg lettuce that is resistant to Nasonovia aphids. "Many lettuce varieties are highly resistant to Nasonovia 0, but the mutant Nasonovia 1 is most troublesome. There are currently no commercial varieties on the market with that resistance. We should be able to introduce Nasonovia 1-resistant iceberg lettuce within two years," says Paul.

LESS EFFECTIVE CHEMICALS

Nasonovia 1 has been around since 2009. Paul, though, notes that it has become a bigger problem in the past few years. He attributes this to the declining range of crop protection products. "Nasonovia 1 wasn't an issue for several years because those chemical products were quite effective. However, there are fewer and fewer of those products on the market, and some remain less effective. Nasonovia 1 aphids are, thus, becoming more prevalent in cultivation. The decline in the number of active substances will likely continue, too, making it increasingly difficult to use chemical methods to control a number of pests."

There are a few crop protection products that can help combat the Nasonovia problem. That has recently caused cultivation issues in the Netherlands and Germany but can also strike elsewhere in Europe. However, according to Paul, that solution is only temporary. "Those products can provide support for another three years or so, which offers time to develop other solutions," he says.

IMPACT ON ACREAGE?

Not finding solutions to Nasonovia, but also, for instance, Bremia - a fungal disease that causes lettuce leaves to turn yellow or brown - the product manager foresees consequences for the market. "There's currently enough lettuce on the market. But if the cultivation risks become so great in the next five years and are borne solely by growers, that could impact the acreage." He also sees a role for consumers. "People have a reason-

Enza Zaden believes that, due in part to the abolition of pesticides, resistance in plants is becoming increasingly important.

able zero tolerance for damage to lettuce. Shoppers will have to have greater acceptance if lettuce can no longer be supplied without that zero damage guarantee," Paul explains.

He believes the process must, therefore, be broadly implemented, including in research. "It takes seven years for a lettuce variety to be ready. That means that, for instance, the Bremia genes incorporated seven years ago must work against physiotypes that occur seven years later. So, research is important, and we've gathered a great deal of knowledge in this area in recent years."

COMBINATION

Paul sees potential in combining measures. "In the future, you may have to supplement resistance with a biological solution to achieve sufficient control," he explains. That is why Enza Zaden is also taking part in Koppert Biological Systems' research into using chrysopa in lettuce cultivation. "That involves using lacewing eggs, from which larvae emerge that feed on aphids. That method is already widespread in greenhouse horticulture and is now used in open-field lettuce cultivation, too."

Paul adds that the European lettuce acreage has been stable lately. Iceberg and Romaine lettuce are the largest crops, supplemented by smaller segments such as full-soil butter and colored lettuce. That means a sizable market is eagerly awaiting the resistant varieties. "All the more because all those types of lettuce are susceptible to Nasonovia and Bremia," he concludes.

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Greenco recovery:

“Five years ago, we’d not have thought we’d end up here”

These days, it is not only Tommies tomatoes rolling over Greenco’s conveyor belts. After a few tough years, this Dutch company, which celebrates the Tommie brand’s 20th anniversary this year, has changed its strategy. It still grows and packages snack tomatoes, but even more than before, Greenco is also a packaging specialist. And creative choices are still being made.

On a Wednesday in mid-January, we visited Jos van Mil and Richard de Jong at their office in the Netherlands. With Greenco switching to a new salary payment system, things had been hectic for a while. Unsurprisingly, there were some teething problems. So, Richard, who has to ensure everyone gets paid, only briefly joined us before getting back to his computer.

These issues are minor compared to the problems the company faced five years ago when Greenco found itself in dire straits and was forced to divest itself of several growing locations. However, at the start of 2025, the company is in good shape again. “We’re back to our old selves,” says Jos, who has just returned to work after some health issues. He and Grenco are doing well again.

THE GOLDEN BRIEFCASE

In its first decade, Tommies - the company’s snack tomato brand - “sold itself”. Jos beams when he thinks back on those good times. Cherry tomatoes were a new concept, and the company was good at not only growing but marking this new product, too. “We expanded like crazy,” Jos begins. “It was an almost unstoppable snowball.”

Greenco made its name, time and again, with new ideas, concepts, and packaging. Jos reminisces about trips to the PMA, a large produce trade show in the USA. “We [Jos and Jan Zegwaard] would walk around with our briefcase that we’d sprayed gold. People would stop and stare and ask, ‘What’s with the gold briefcase?’ It was full of new ideas,” he recounts.

After the first ten years or so, competition for snack tomatoes logically and unsurprisingly increased. Greenco had become a large corporation with huge overheads. And then came 2016—the year of hail damage. Within minutes, the snack tomato specialist’s greenhouses were among those destroyed by this unforeseen weather. “In one fell swoop, we lost 40% of our total surface production area.” Desperate times call for desperate measures, and Greenco quickly began looking for alternatives. ”We bought extra crops, including those that need plenty of light. We wanted to be producing in the coming winter,” says Van Mil.

TOMMIES ANNO 2025

In hindsight, not the best choices were made in fear of losing market share due to extreme weather conditions, he admits. “When, in 2017, even more snack tomatoes flooded the market, we were stuck with agreements we’d made.” In the following years, Greenco did away with several cultivation locations and returned to basics. The shareholders, including Jos, are now back in the driver’s seat, with two managers, Richard and Ruud Poels, at the helm.

Come 2025, and the snack tomato specialist still has three growing sites, one close to its packaging plant, and it leases a single greenhouse. The spectacular rise of the snack tomato is over, so things quietened down at Greenco. Jos knows the company has been less conspicuous in recent years. That is partly because the Tommies brand is far less visible in the Netherlands, he explains. Supermarkets no longer carry the brand and Greenco now supplies snack tomatoes under a private label.” You can, however, still find Tommies in greengrocers, camp-

ing shops, and at the Van der Valk hotel chain. The Van der Valk in Utrecht even still has a few of our snack tomato vending machines," he says.

STILL SWEETELLE

As always, the company markets the Sweetelle snack tomato variety via The Greenery. That is quite something, especially since the market has started growing more resistant varieties out of fear of the ToBRF virus. Greenco's crops, too, include a resistant variety. "The variety we cultivate is vital. It lets us stand out. We've been growing Sweetelle for 15 years." If Jos were to do a blind taste test, he swears he would still manage to pick out the variety he grows himself.

Van Mil acknowledges that choosing this non-ToBRFV-resistant variety is risky. "Yet we still do so, as do the growers we work with," he points out. Although Greenco itself now grows fewer varieties, snack tomato volumes have remained stable, even increasing slightly, in recent years, says Jos. "In the summer, four Dutch growers cultivate Tommies for us. Winter is trickier, and we've recently had no local lit cultivation during that time. Then, snack tomatoes come from growers in Spain and Morocco and involve substantial acreage."

TOMMIES TOV

Overseas, however, Tommies are still abundant. "I still believe in the Dutch market for snack tomatoes, but I feel that consumers abroad are more willing to pay for premium products. In Scandinavia, for example, our Tommies are still on shelves as premium products at higher prices. We also supply the Middle East and Iceland, and have had inquiries from Ireland as well. Hong Kong, too, where we've also been supplying Tommies for years, wanted regular vine tomatoes under the Tommies brand. We now also offer that," Jos explains.

He is optimistic about the snack vegetable market in the Netherlands, too. "Snack vegetables are here to stay. The supermarkets are full of them." That, though, is also challenging. "Snack tomatoes have become a commodity in the Netherlands. You hardly see any brands on Dutch fruit and vegetable shelves anymore," Jos observes. He mentions Looye as the striking exception of greenhouse vegetables. "They're truly distinctive. You can't simply copy that. I find that's impressive."

Labor is an issue in the snack tomato sector. ”It's expensive. Here, workers get €6 or €7 for 15 minutes of work; in Morocco, that's a full day's pay,” Van Mil remarks. Competition is fierce, which has led to a price drop. “You have to keep going, but for how long?” Greenco has worked with growers in Spain and Morocco for years. “They cultivate a fantastic quality product, but it's different,” he says.

NEW PARTNERSHIPS
Jos has always been very involved in the packaging side of things. He calls it ,his hobby' and his creative outlet, and nowadays, Jos gets to apply that creativity more internally, too. “I love my current role.” The organization has been adjusted in recent years, now that Greenco has less of its own cultivation and has started doing more packaging, also for third parties. “There's less room for new ideas these days. That shelf is already quite full, and most clients want top-quality sealing. Packaging entirely in cardboard is tricky. “People want to see the product clearly, and it seems cardboard packaging also involves even more manual labor,” he explains.

Still, there is a greater-than-ever focus on packaging because Greenco has undertaken a new role as a packaging specialist for all kinds of greenhouse vegetables. “We, for example, have been packaging standard vine tomatoes and snack cucumbers and bell peppers for Jumbo and Hoogvliet [two Dutch supermarkets] for two years now. And, this year, for the first time, English cucumbers. These come from a grower who contacted us asking if we could package those, too. We'll package that grower's cucumbers in shrink wrap. And who knows, that may also bring new work.”

Over the past few years, Greenco has ensured HelloFresh has tomatoes in its vegetable packs. “Nowadays, that includes our own tomatoes. And it's nice when they ask for my input regarding the packaging as well,” says Jos. Another special collaboration is with another new name in the Netherlands' fresh produce retail world, Picnic. “Last year, we supplied some of Picnic's fruit and vegetables. We hope to do that this year, too. Talks are ongoing.”

TELLING HORTICULTURE'S STORY
The same morning we interviewed Jos, he had spoken with someone from the Netherlands Enterprise Agency (RVO). They discussed Tommies and Dutch horticulture as a whole. He enjoys that and points out that telling the ‘Dutch horticulture' story is vital. The RVO is working on such a story. A visit to Tomatoworld, the demo location just around the corner from Greenco, which Jos is involved in, helps with that. “I'm happy to help tell the story of horticulture. But it's even better when people from outside, like the doctors from Caring Doctors, talk about fruit and vegetables' health benefits,” Jos explains.

Five years ago, they had no idea they would head in this direction, Jos admits. The reorientation worked out well, though. The trucks still come and go, but not always sporting Tommies on their sides or even loaded with them. “We have a fantastic warehouse and can use it well.” Jos does not expect the company to add new greenhouses immediately but does not rule out growth, per se. “That will, however, be with our existing partnerships with growers,” he concludes. (TT)

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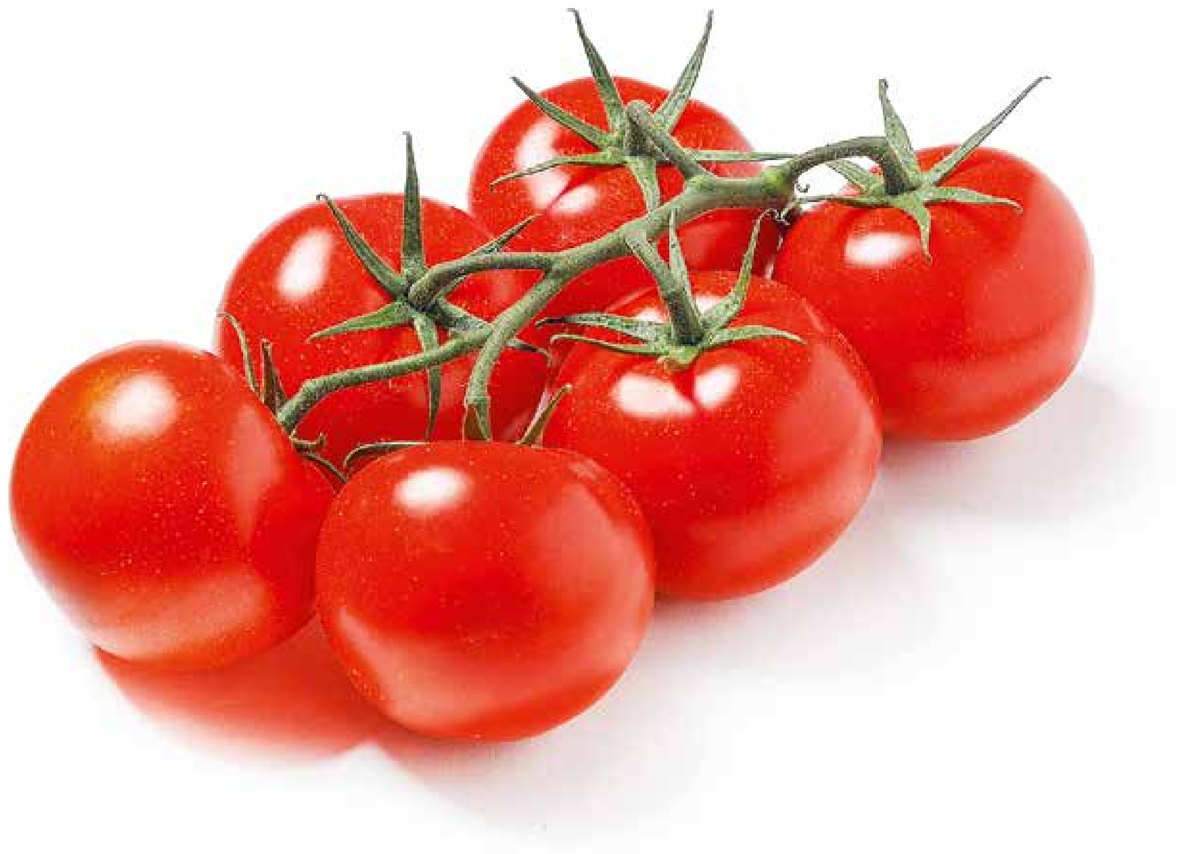

"New medium-sized TOVs' high yields are distinctive"

Breeding company BASF | Nunhems is launching several new tomato varieties this season. The large vine segment has resistant successors to existing varieties, and in the specialty segment, more and more options with resistance are becoming available, including in snack tomatoes.

Ties Persoon im Tomato Experience Center

ToBRFV resistance has recently been a hot topic in the tomato market. BASF | Nunhems has always deemed offering growers certainty through Tomato Brown Rugose Fruit Virus resistance important. Their range of resistant varieties has proliferated in recent years. "Nowadays, we almost exclusively sell ToBRFV-resistant varieties," begins Sales Specialist Ties Persoon. One exception is the Provine. "That variety is still doing very well. Growers are used to cultivating it and appreciate the high yields they can achieve with this large vine tomato."

Breeders at this international company, with two Dutch tomato breeding locations, have succeeded in increasingly enriching varieties with resistant genes. "With our tomatoes' current level of resistance, growers are guaranteed a good harvest," says Pascal Wanten, tomato breeder at BASF | Nunhems. "The R&D department keeps looking for more genes to add to build even more certainty into the breeding material. That's for both conventional and specialty tomatoes."

NEW VARIETY GROWS QUICKLY, HAS GOOD YIELDS

BASF | Nunhems sees a careful shift toward larger varieties in the tomato market. The company has been taking steps in those segments where high yields, along with good quality and flavor have always been significant. ShowVine - the ToBRFV-resistant successor to the Sunvine variety - is a new variety in the larger TOV segment. The breeding company classifies the variety as medium-sized. "ShowVine truly shines regarding production. It grows quickly and produces plenty of trusses," says Ties.

Its fruit weighs on average 130 grams. Remarkably, the variety produced more

Erwin de Kok, accountmanager hightech crops, und Jan Zwinkels, trial technician tomato

kilos in the breeder's trials than larger varieties. This year, De Bakker Westland is cultivating it on six hectares without lighting, and it is being tested throughout Europe. "Unusually, that's possible with this slightly smaller vine tomato," adds Pascal, explaining that this is due to high cluster splitting. "That contributes to high production. They set extremely quickly, which makes for a very reliable variety."

WINTER CULTIVATION UNDER LED

BASF | Nunhems focuses on things like labor in its tomato variety breeding. Here, it is vital that the plants produce shorter internodes. "You don't have to turn the plants as often and have to handle the crop less. That saves on labor," Pascal explains. Another point of attention regarding cultivation technique is growing under full LED lighting. More and more tomato growers are switching to that. "We screen all our varieties under full LED."

Growing under LED lights is different from what growers are used to. Also, with the rise of LED lighting, growers have started cultivating ToBRFV-resistant varieties, which also differ slightly. It is widely known in the market that new resistant varieties sometimes score slightly lower production or quality-wise. Breeding companies are working hard on new introductions to compensate for any percentage lost in quality or production. Ties: "Our resistant cherry tomatoes, and in this case, the vine tomatoes, have maintained their flavor well. Our new resistant varieties' production levels are the same as the non-resistant varieties." The new ShowVine is therefore a striking newcomer, with high cluster splitting and production.

BASF | Nunhems closely follows realword developments and tests varieties with its own crops, both in lit and unlit cultivation. "It's vital to continue listening carefully to the market to keep developing varieties that are in demand," Pascal notes. According to Ties, what helps growers in full LED cultivation are varieties that produce steadily and color well, even in the difficult early stages of winter cultivation under lighting.

The 150+ varieties the breeding company has in its Tomato Experience Center in the Netherlands are specially suited to high-tech cultivation. "We have a breeding program in Spain that focuses on midtech varieties for Mediterranean growing conditions. That doesn't mean certain high-tech varieties, such as Ronvine, don't do well in Turkey and Mexico," Ties points out. Pascal adds that growers who cultivate high-tech varieties in midtech greenhouses must be able to control whitefly pressure. "If they succeed, they can sometimes grow Ronvine, and some of our high-tech cherry tomato varieties in Mediterranean conditions in mid-tech greenhouses," he concludes.

NEW SNACK TOMATOES

In the specialty corner, where the breeding company is less well-known, it is developing snack tomatoes, among others. In addition to the well-known Pulsion, there is now also a resistant successor, NUN 08907, which is being tested worldwide. Then there is NUN 08908, a snack tomato with resistance. BASF | Nunhems is also building certainty for growers in this segment. It is testing how these high-tech snack tomato varieties perform in other climates, like North Africa and Mexico, which Pascal and Ties currently consider some of the largest emerging tomato cultivation markets. (TT)

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Sven Jordens, Gemex:

“Belgium’s specialties keep it distinctive on the German early markets”

Gemex, a fresh produce exporter to Germany, switched entirely to products from Belgian cooperatives and growers in mid-April. In recent years, retailers have been taking market share from wholesalers in the fruit and vegetable segment, including in Germany, and in that country, some wholesale markets are even on the brink of disappearing. Despite that, Sven Jordens, the second generation in this Belgian family business, remains committed to serving the early markets. “We’ll be somewhat more focused on serving the food service sector, though,” he begins.

Every afternoon, from its location in Genk, Belgium, where 18 office and warehouse staff work, pallets, including mixed ones, are loaded into trucks bound for Germany. Half of those contain vegetables, with greenhouse vegetables, especially tomatoes, making up the bulk. Flemish carrots and leeks are in high demand, too. The fruit range includes strawberries, soft fruit, apples, and pears.

STAFF SHORTAGE

With 12 trucks in its fleet, products are brought from different Belgian cooperatives to Genk every morning. Once the order pickers have assembled the pallets, drivers set off for the early markets in several German cities. Everything runs smoothly in the warehouse, although Sven admits finding enough staff to prepare the pallets is becoming difficult. “That must be done within a limited time. The fruit and vegetables arrive at our premises at noon, and there’s much to do in the following three or four hours. It’s hard to find people for that. Also, many find driving, where you start around 4 p.m. and are on the road in the evening and at night, unattractive. But in Belgium, even those wanting administrative staff or salespeople are having a tough time of it."

SPECIALTIES

According to Jordens, in the winter, Belgian greenhouse vegetables hold their own against the abundant supply of Spanish products in the German early markets. "Take Ruby Red tomatoes: Their dark red flesh makes them popular. Specialties such as Miss Perfect cherry vine tomatoes from Coöperatie Hoogstraten or Aromia from Bel'Orta are also an asset. Of course, the Spanish products are good, too, but now that the switch was completed two weeks ago, German customers are noticeably happy that they can buy familiar products," he says.

LIT CULTIVATION ON PAR AGAIN

Gemex supplies its clients year-round, so the exporter offers some greenhouse vegetables from the Mediterranean in the winter. "We don't import anything ourselves. As for tomatoes, we only import those grown under lights in the winter. This year was the first time since the pandemic that cultivation was fully up and running in Belgium, which was a big plus given German consumers' preferences. It was also the first time we could offer Belgian cucumbers year-round."

The German-grown cucumber supply is, however, huge. "And people like eating locally grown food. Exports from Belgium need to focus more on, say, specialty tomato varieties. That's where it can distinguish itself. Also, only premium products can compete with tomatoes, bell peppers, and raspberries from Poland because you can't beat them on price. Polish quality isn't deteriorating either; on the contrary, those growers are constantly learning more," says Sven.

ACQUISITIONS AND SUCCESSION ISSUES

Sven has been at Gemex for 22 years. Along with the gradual rise of retail at the expense of wholesale in the German fruit and vegetable market, he has witnessed countless takeovers on the supply side in Belgium over the past two decades. "There are far fewer exporters, and many previously independent companies are now part of a group. In fact, we're one of the few independent fresh produce exporters to Germany."

"In Germany itself, we're increasingly having to focus on food service. In the wholesale markets, companies – often family businesses – face competition from supermarket chains and a lack of succession. We're not letting it get us down, though, as we still see plenty of opportunities to continue supplying the German market. We'll ensure my parents' - who both turn 75 this summer - legacy has a bright future," Sven concludes.

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The intense dark red color; an important cosmetic aspect for breeding

KWS Vegetables

Know-how gained from sugar beets benefits red beet breeding

Red beets are rich in fiber, vitamins, and minerals, which makes people like athletes big fans. It is certainly not the biggest product on vegetable shelves, but its health and performance-enhancing properties have earned it a permanent place. KWS has fully embraced the product. And to market red beets effectively, this Dutch breeding company tries to involve everyone in the chain: growers, traders, processors, and retailers. KWS Vegetables even wants to become the market leader in red beets. This article explains why that is not an unrealistic goal.

Since acquiring Pop Vriend Seeds in 2019, KWS Vegetables has built on that German group's years of extensive knowledge of developing sugar beet varieties. "Sugar beets are a far larger crop than beets. There's, thus, a much greater investment in breeding. However, some of their genetics are similar, so breeding can be linked. That synergy strengthens our ambition to soon become the red beet market leader," begins Joan de Visser, senior red beet and Swiss chard breeder at KWS Vegetables.

ADDED VALUE FOR THE ENTIRE CHAIN

She explains that her colleagues are working hard at things like building all sorts of resistances into the beets. "Once those are in place, we and our customers can benefit. Since the acquisition, there have been many more opportunities to test red beets in different climatic conditions, with our research station or a network of colleagues who help set up a trial. Our clients can count on varieties that are more resistant to different diseases and pests. That means higher yields and lower crop protection product dependence. A company like KWS, with its broad market presence, is worth its weight in gold to breeders."

KWS Vegetables is only active in nine crops, so there is a strong focus. According to Joan, it is just a matter of time before the company launches a far wider range. "We'll be able to contribute to the entire chain. Scarlett's high Brix value is undoubtedly a very valuable trait for maintaining a high sugar content after vacuum packaging. But with the resources now available, other characteristics will also be considered to serve every link in the chain," she says.

RhizomaniaPROTECT, integrated disease resistance from the KWS sugar beet program

FOCUS ON BIOTIC AND ABIOTIC STRESS FACTORS

The current focus is on varietal innovations, especially biotic resistances, though the breeder also pays attention to abiotic stress factors like drought and excessive moisture. Joan says that last year, they submerged the beets under water for more than a day at the KWS trial field. "The damage wasn't too bad. It's a robust crop. In Eastern Europe, growers sometimes can hardly irrigate, so drought stress is common. Because we're specifically looking for varieties that maintain their quality and yield in hot, dry conditions, those genetics can be used in a country like the Netherlands. As the past few years have shown, it's not entirely immune to heat waves or dry periods."

DEVELOPING VARIETIES

"Our assortment presently includes two round red beets: Scarlett and Jolie. The classic beet remains our focus for variety development, and those two varieties are suitable for the fresh market and industry. One is slightly smoother, the other slightly sweeter or more vigorous. Scarlett's high Brix value is an advantage for vacuum packaging, while Jolie's smoothness is ideal for the fresh market," says Joan.

She adds that red beet fresh market sales traits differ per country. "In Brazil, the standard is very high: smoothness and a dark color are essential: Their aesthetic aspect, so to speak, along with, of course, shelf life. In Peru and Colombia, the beets are sold with their leaves, so those greens must look healthy and be firmly attached to the root. In Western Europe, there's relatively little fresh market left; most red beets are processed. But what's destined for the fresh market must, just like in Brazil, be dark in color and smooth."

PESTS AND DISEASES

Red beets are hardy and not sensitive to day length, so they can be grown worldwide using a fairly limited number of varieties. "Beets aren't fussy, so they're perfect for organic cultivation. Still, there are a few diseases and pests that require a breeding response if we don't want to resort to crop protection products," De Visser says.

She points out that fungi such as Rhizoctonia and Cercospora beticola, as well as the Rhizomania virus, pose challenges for growers, depending on the season. "Take Rhizomania. It's why current red beet varieties struggle on certain Dutch plots. Also, because most of the crop is organic, a resistant variety would make finding a suitable plot much easier."

Globally, Cercospora beticola is the greatest biotic challenge. "It causes leaf damage. On plots where those fungal spores, which are always present in the air, strike hard, the crop can lose all its foliage and the grower their yield," Joan explains. "Then, with the current crop protection products, it takes expertise to keep the crop clean during a bad year."

Two years ago, using neonicotinoids to coat seeds was banned. That has hit systemic aphid protection in the early stages of cultivation hard. To combat pests and diseases, growers must, therefore, place all their hopes on breeding companies. KWS is taking up the gauntlet and has been in an excellent position to do so since taking over Pop Vriend Seeds. "We should talk again in five years. The path we've taken leads straight to our goal," Joan concludes enthusiastically.

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According to Joan de Visser, it is only a matter of time until the company enters the market with a much broader product range

Italian new season carrots: Six out of ten destined for export

the scenario that emerges from the comparison of the marketing years 2023, 2024 and part of 2025 for early carrots of Sicilian origin, grown in the south-eastern part of the island, is a complex one. The climatic impact seems to be the most influential factor in the European commercial and trade dynamics.

The following overview of the situation is provided by Massimo Pavan, an experienced agricultural manager: "The production season for the early carrots from this region begins in January and ends around the first half of May," he adds. "This time window is crucial because it takes advantage of the favorable climatic conditions of the region to meet the demand for an early product, both on national and international markets. The Sicilian early carrot is known for its freshness, crispness and exceptional taste, which distinguish it from other carrots."

"To understand what is happening this year, we need to broaden the scope of analysis," the agricultural manager continues. "The year 2024 marked a particularly successful season for the export of our early carrot, reaching a peak of 60% of total production. This commercial upsurge can be attributed to the adverse weather conditions that affected the main European production areas, such as Germany, France and Belgium, during the summer of 2023. The summer period is critical in these regions as it overlaps with the planting season. The severe drought that affected this area led to lower than usual yields, creating a greater demand for early carrots from Sicily to compensate for the shortfall in domestic production."

Massimo Pavan

"In 2025, the situation was drastically reversed," says the expert. "The previous summer, i.e., 2024, was one of ideal climatic conditions in central European countries. This favorable scenario led not only to high yields, but also to an increase in cultivated areas compared to the previous year, precisely to avoid what happened in 2023/24. The combination of high yields and expanded production areas generated a surplus of carrots on the central European markets, some of which were refrigerated around December and gradually phased out by late spring. As a result, the demand for Sicilian early carrots from abroad decreased significantly in 2025."

WHAT FACTORS ARE PREVENTING THE PGI CARROT FROM MAKING A BREAKTHROUGH?

According to the interviewee, the 2025 Sicilian production campaign was characterized by exceptional quality. "However, production suffered a loss of between 10 and 15 percent of the cultivated area due to the heavy rains in January. This precipitation was particularly impactful on plots located at lower altitudes, leading to a partial loss of harvested product. The total area planted with early carrots in southeastern Sicily in 2025 is about 1,600 hectares. Of this area, approximately, 10% is cultivated in accordance with the PGI (Protected Geographical Indication) trademark specification. The PGI-certified crop represents a distinctive characteristic and underlines the local link with the land and specific agricultural practices. However, the certified product is still struggling to be exported because it is not well known abroad. This limitation in international recognition curtails the commercial potential of certified Sicilian early carrots. As a result, most of the branded product is only in demand in Italy, but even on the domestic market, supermarkets often do not adequately recognize and value the PGI carrot."

According to Massimo Pavan's analysis, "A greater commitment on the part of domestic retailers towards the PGI label could be an important stimulus for domestic production, which is highly controlled from a nutritional point of view. Italian products are regarded as the most virtuous in terms of food safety by the RASFF (Rapid Alert System for Food and Feed). In this context, enhancing the PGI could ensure fair recognition for producers and offer consumers a quality and safe product."

"The average price of a kilogram of Sicilian early carrots in 2024 was approximately €0.30 cents," he adds. "However, it is too early to provide an accurate average for 2025, as this can only be calculated at the end of the commercial season."

"Speaking of foreign products," concludes the entrepreneur, "in recent years we have noticed that as soon as the price of carrots increases even a little, there is a reaction in Italy to import carrots from other countries, such as Portugal, Spain, Israel, Turkey, Serbia and Egypt. These crops are repackaged in Italy after arriving in packages of 1000 kg and sold on the Italian market. The challenge we face is that no market or supermarket sells products marked with their true origin, which suggests the need for stricter controls on importers to track these products. The misrepresentation of imported products as Italian is not only a form of food fraud, it also harms our producers, whose orders experience a reduction in prices due to the influx of products from other countries entering Italy at times of high market demand."

European strawberry cultivation under pressure: new Belgium research facility offers sustainable perspective

Strawberry cultivation in Europe is undergoing major changes. While Southern Europe has long been the hub of winter production, climatic and ecological factors are increasingly undermining that dominance. In Spain's Huelva growing region, growers report a difficult season. In response to the challenges faced in Southern Europe, more and more Western European growers are investing in protected strawberry cultivation. This year, the Hoogstraten Research Center also opened new research greenhouses aimed at contributing to more sustainable and efficient production in Northwestern Europe. These initiatives not only address climate-related challenges, but also rising energy costs, stricter regulations, and the need for innovation.

DECLINING PRODUCTION IN HUELVA DUE TO DROUGHT AND RAINFALL

Strawberry cultivation in Huelva, Spain, has been under pressure for years due to drought. This season, extreme rainfall added to the difficulties. Huelva is Spain's most important strawberry region, producing 97% of the country's strawberries. In 2023, the harvest reached 350,000 tons.

In 2000, the harvest was 306,000 tons. Production dropped for three consecutive years after that, reaching a low of 237,770 tons in 2003—the lowest figure of this century. Between 2004 and 2014, good and bad years alternated, mainly due to weather conditions. In some years, there was a 70,000-ton difference between two consecutive harvests.

The highest production ever was recorded in 2015, with nearly 389,000 tons. Apart from 2020—the pandemic year with 261,180 tons—the harvest has hovered around 350,000 tons. In 2024, the harvest was 349,120 tons.

Still, this represents a drop of about 9% compared to the previous year. The decline is primarily due to ongoing water shortages since fall 2023. Growers had to limit irrigation or leave parts of their land unused.

Hans Vanderhallen, Coöperatie Hoogstraten, and Tom Van Delm, Proefcentrum Hoogstraten

A glimmer of hope came in the form of rainfall in February, but the rain was a double-edged sword. Many fields became inaccessible, harvesting was temporarily halted, and in some cases, strawberries were damaged by mud and fungal pressure. "The water came too late and in too large quantities," say Spanish growers. "We simply couldn't process it properly."

Societal pressure is also increasing. The nearby Doñana region is a protected natural area, and debates over groundwater use and illegal wells are intensifying. The government is tightening regulations, making the future of intensive cultivation in the region uncertain. With climate models predicting little improvement, attention is slowly shifting to northern alternatives.

LESS AND LESS OPEN-FIELD PRODUCTION

This trend has been underway for years. According to RaboResearch data, the acreage of strawberries grown under cover (such as in greenhouses or plastic tunnels) has been increasing for years in the Netherlands, Belgium, and Germany. The total strawberry production in these three countries has remained fairly constant over the past decade at around 250 million kilograms.

Currently, nearly 55% of their combined production comes from covered cultivation, while 45% comes from open-field cultivation. Covered production in the Netherlands has seen strong growth. Open-field cultivation in Germany has significantly declined, and in both the Netherlands and Belgium, open-field farms are increasingly shifting from strawberry production to the cultivation of plant material.

So, less and less open-field production—but strawberries grown in greenhouses come with their own unique challenges. That's why new solutions are being developed in Belgium. On Saturday, March 23, the new research greenhouses at research centrer Proefcentrum Hoogstraten were officially opened. In addition to strawberries, tomatoes and peppers

One of the eight strawberry greenhouses in which the aromatic Palando variety is now grown in spring.

will also be studied. It's a milestone for the center, which has conducted strawberry research for over sixty years. Supported by growers, cooperatives and the government, the research center focusses on knowledge development to respond to rapidly changing markets, said director Tom Van Delm at the opening. Deputy Jinnih Beels emphasized this investment is primarily an investment in innovation. "Our focus is on the future. The challenges are great—climate, market demand, energy", she summed up. "But horticulture is already leading the way, both technologically and in terms of insights." The infrastructure includes seventeen compartments: three smaller ones and fourteen on a semi-commercial scale. According to Hans Vanderhallen, director with Coöperatie Hoogstraten, the latter is crucial. "We conduct research that growers can apply tomorrow. Running a profitable operation requires expertise, good education, and continuous innovation. That's the knowledge we build here."

VARIETY TRIALS

Making greenhouse cultivation of strawberries more sustainable means focusing on growing more with less, using more sustainable resources and answering the market demand better. In the greenhouses, trials for example are being conducted with Parlando, a variety popular in Spain that can be grown early and produces particularly flavorful fruit, and also with Sonsation, a main market variety being tested for energy-saving potential.

Variety trials are a major part of the researchers' work, testing how different varieties perform. One of the main selling points of greenhouse strawberries is consistency—in both production and flavor. To ensure that consistency, researchers are paying close attention to the characteristics of summer fruit, just as they do with tomatoes and peppers. This includes taste, texture, flesh color, calyx orientation, fruit shape, fruit color, and uniformity of form.

WHAT'S NEXT?

Now that strawberries are an established crop and other soft fruits like raspberries and blueberries are gaining ground in Northern Europe, the question is: what's the next product to take root here? Hoogstraten is already exploring the possibilities. A special research team focuses on innovative crops. In recent years, they've studied melon cultivation, initiated by a tomato grower who saw potential in using melons as a short interim crop. By growing them vertically and trailing them over crop wires, melons are suitable for tomato greenhouses.

This season marks the second year of research into passionfruit—a very different case, as it is not a short crop but one with a potential production cycle of up to seven years. Researcher Lise Soetemans emphasized that the goal isn't to instantly become expert growers. "We're looking at what the plant can do: what is its production potential and what are the pain points? If a product breaks through, we already have a roadmap for the future."

Summer season begins at Frankort & Koning:

"Striving for consistent production has flattened the true peaks"

Easter is just around the corner, and spring is in the air. The Dutch strawberry season is, thus, well and truly underway. Plenty of unlit volumes are on the market, and the rush is starting for Dutch traders. That is also the case at Frankort & Koning, where the soft fruit division has expanded rapidly over the past few years. "We sell strawberries all year round, but at this time of year, weekly volumes multiply. Retail, catering, and wholesale customers are increasingly finding their way to us because of our service, flexibility, and product quality," begins Sjraar Hulsman.

The trader is happy with how the winter season went. "Lit cultivation is gradually gaining ground, not only with clients in the Netherlands but overseas, too. More exclusive buyers in our non-Dutch markets want to continue in winter. They want the same type of produce that meets the same quality requirements and is in the same packaging, directly from our growers. We could, therefore, keep going well over the past few months. Everyone participated. That's partly because Spain had a lot of rain. That was desperately needed because it had been far too dry there, but it did cause some quality problems, so some customers switched to Dutch products earlier."

On the cultivation side, says Sjraar, lit cultivation has picked up well again after the energy crises. "Growers invested in energy-efficient LED lighting and are increasingly striving for more consistent production. On the one hand, to avoid peaks, as price drops generally accompany those. On the other hand, they want a uniform workload so they can employ a permanent team and maximize their resources. Growing companies have to provide accommodation, another reason why year-round employment is desirable," he says.

"Also, when growers have to start with a new group of people every time, they have to teach them how to pick the products and what crop work needs to be done, especially in strawberry cultivation. That's very costly and time-consuming. The quality often reflects that. There's always someone who handles the product a little less gently. That consistency is being addressed by choosing varieties with a longer production period, which we then see back in both the winter and summer volumes."

COMPETITION FROM ITALY

Yet, despite continuous trade, the ‚true work' begins anew in mid-April, marketing-wise for strawberries. These, after all, remain a summer product par excellence. "Unlit cultivation has added great quality, and we've had wonderful weather, with cold nights and sunny days. That's ideal for strawberries. They set well, too, because the pollen is loose, and the bees are buzzing all around. That raises this fruit's Brix value, which improves its flavor, dry matter content, and firmness. Diseases such as fruit rot are also less likely to occur. So we certainly have no complaints, and with the sun comes demand. For the past few weeks, the German market, our largest one, has noticeably been turning to products from the Netherlands," Sjraar explains.

"Germany has greenhouse produce - very similar to Dutch produce - on the market, too. But, the asparagus harvest is slowly getting underway, and farm stalls often offer that alongside strawberries. That's where the high demand is originating." Will there be a complete switch to Dutch strawberries?" No, there's still competition from Spain, and Germany still has full-scale retail campaigns with that product. Questionably low price levels sometimes accompany that, but apparently, that's possible. Italy and Greece are also emerging as production areas. Italy, in particular, can compete with the Netherlands in terms of quality, so Italian strawberries are popular, especially in southern Germany. That makes competing in those areas difficult."

NO MORE PEAKS

Price-wise, Sjraar is satisfied with how things have gone, but the arrival of large volumes has caused a slight dip. Nonetheless, according to him, that is of no concern. "From week 7 onwards, we had fairly high prices of €11 to €12 per kilo. When the first strawberries of the Inspire variety and Lady Emma from unlit cultivation arrived, prices fell somewhat to between €7 and €9, which is still satisfactory. Sonsation was added about three weeks ago, and Elsanta has recently returned to the market, putting more pressure on prices," he explains.

"We've, thus, dropped to €5 - €6/kg, but that's not unusual for this time of year. These are traditionally ‚normal' levels. The market is, however, noticeably somewhat erratic. Prices at various auctions dropped in early April and again this week, but expectations for Easter are high and we're expecting another sales boost. After Easter, our strawberries will also be shipped in larger volumes to Scandinavia, the Baltic states, and later to the Mediterranean countries. We have a strong position there and are ready to go."

"When it comes to choosing varieties, ever-bearers are garnishing more interest. Breeding is based on consistent production, flavor, shelf life, and minimal use of crop protection products. That means certain varieties are disappearing," says Hulsman. "A variety that was widely grown in the Netherlands, mainly because of demand from the English market, is now being phased out of greenhouse cultivation due to its susceptibility to root diseases. Growers tried to keep it going with chemical crop protection products."

"But that variety is now genuinely on its way out. No grower wants to use chemical crop protection products. And vigorous plants are vital. People want alternatives to crop protection products, like UV light, to combat mildew. The market demands it and growers want to find the best solution. Those alternatives are, thus, being explored to the fullest. I'd stake my reputation on it. That trend is set to continue, so we should see an increasing shift in varieties and alternative approaches to pest and disease control," Sjraar concludes.

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Italy's strawberry exports hit their lowest volume in five years, but revenues increased

"This campaign is unusual; sometimes we get excellent results and sometimes we get barely acceptable ones," says Carmela Suriano, a strawberry grower in southern Italy (Basilicata region). "We are in a period where climate change is impacting crops. "The season has started quite well, but I am not sure we will have large volumes for the rest of the campaign."

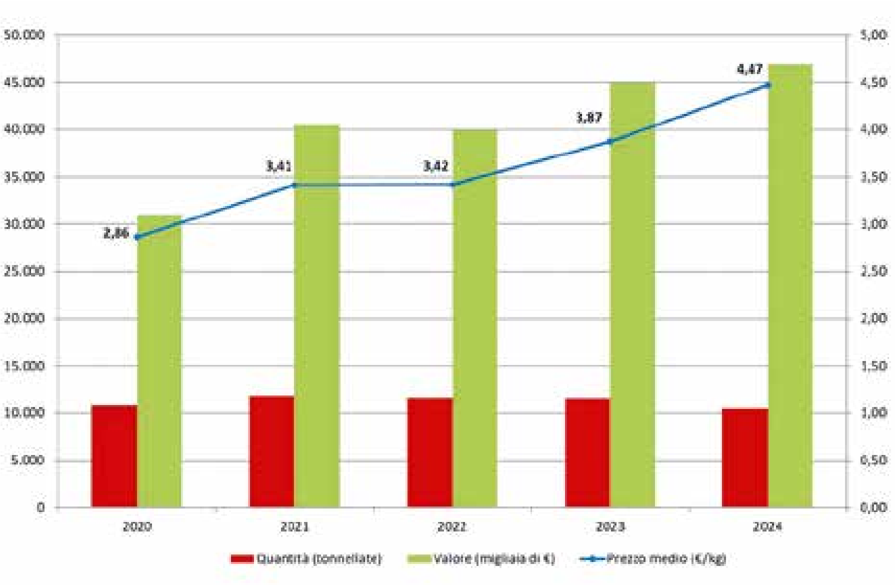
During the first seventy days of the harvest season, Italian operators saw a favorable market trend, partly due to difficult weather conditions in Spain, which resulted in significant damage to many strawberry orchards and a subsequent reduction in processed and exported volumes to Europe.

"The situation was very positive until the eleventh week. Prices were 30% higher than those compared to the same period in 2024, and volumes were not enough to meet domestic and foreign demand. Exports from southern Italy, particularly to Germany, Austria, and Switzerland, were substantial. However, since the beginning of April, we have seen a significant drop in foreign demand due to the arrival of the first Dutch strawberries."

"The regions that contributed to meeting the high demand were Campania, Basilicata, and Sicily, with Calabria also playing a role. Notably, the province of Caserta, located in Campania, witnessed a record in strawberry sales which allowed them to ensure a steady supply to the markets because, unlike other Italian areas specializing in strawberries, product volumes were much higher in the first few months of the year."

Then the situation changed with the rise in temperatures. "From the second decade of March, supplies increased, causing commercial turmoil, and consequently, a significant reduction in selling prices. In Italy, all the medium-late varieties have entered production, although there are some agronomic problems due to the climatic trend, resulting in a lower fruit set. There is a high waste rate, as strawberries have been damaged by high moisture levels. Some varieties will not be able to resume the production that was expected and hoped for, because the weather events have affected the productive capacity of the plants, especially those varieties that are more sensitive to temperature changes. On the price front, we do not expect any major downward fluctuations in the coming weeks."

STRAWBERRIES, ITALY: Exports – By solar year



Source: CSO ITALY analysis based on ISTAT data

NORTHERN ITALY
Researcher Gianluca Baruzzi provides an update on the current situation in northern Italy. "The Verona area of Veneto began harvesting in early April, while in Romagna, another productive area in the north, the harvest started later. From a production standpoint, the plants did not endure any significant climatic stress, with the exception of a few frosts occurring between March and April. These frosts did not cause significant damage to crops protected by greenhouses."

According to the expert, strawberry production in northern Italy this year has not coincided with that in the south. "There doesn't seem to be a significant production surplus, suggesting that the market is not experiencing a stall at a European scale. Supplies appear to be in line with market demand, and prices are expected to remain at a reasonable level for growers."

EXPORTS
According to data from CSO Italy - Fruit and Vegetable Services Center, Italian strawberry exports during 2024 were 10% lower than the previous season, with 10,500 tons shipped, marking the lowest quantity in the last five years. Conversely, the value increased significantly, reaching an average price of €4.47 per kilogram, marking a 15% increase compared to 2023.

Exports to European Union countries decreased by 13% compared to the previous year. Austria, the primary market for Italian strawberries in recent years, imported only a 5% decrease from our country in 2023, amounting to approximately 4,200 tons. In contrast, shipments to Germany decreased considerably, by almost 30%, reaching a little over 2,200 tons. Within the European Union, shipments to Slovenia, Luxembourg, Croatia, and Lithuania each accounted for a few hundred tons.

Exports to Switzerland, on the other hand, showed a significant increase of 14% compared to the previous year, indicating a growing interest from this market.

Exports of Italian strawberries typically peak between March and May. In 2024, this period accounted for nearly 80% of the total, with substantial volumes also shipped in February, contributing approximately 10% of the total. This indicates an earlier start to the season compared to recent years.

Italy's imports of strawberries have consistently exceeded its exports, with a notable rebound in 2024. In 2024, Italy imported 27,500 tons of strawberries, marking a 13% increase over the previous year and a more than 20% increase in value.

On the production front, estimates prepared by CSO Italy on the size of Italian investments in specialized crops for 2025 suggest a slight increase compared to last year. The total area dedicated to strawberry cultivation in Italy stands at 4,200 hectares, marking a 2% increase compared to 2024. Of these, over 85% are under protected cultivation, indicating a 3% increase.

While the trend in individual regions appears to be different, the crop continues to expand in South-Central Italy, reaching 66% of the total area with approximately 2,750 hectares. In con-

trast, North Italy has experienced a decline, accounting for 22% of the total area, consistent with recent trends.

The Campania region has shown a notable expansion in cultivated area, with a 7% increase compared to the previous year, reaching over 1,150 hectares. Similarly, the Basilicata region has shown a 4% increase in area, reaching almost 1,100 hectares. Collectively, these regions account for 2,250 hectares, representing over 50% of the national total. Conversely, Sicily, Calabria, and Apulia have shown a -6% decline compared to 2024, indicating a contraction in these regions.

However, the cultivated area in the central regions has shown a modest growth, with an expansion of over 500 hectares this year, representing an increase of 4% compared to 2024.

In 2025, more than 900 hectares are estimated for the northern regions, with some downward variation. In Trentino-Alto Adige, cultivation is almost stable this year, after the decreases of the previous years. Slight declines seem to be observed in Veneto (-2% compared to 2024, which had actually recorded a momentary recovery), Emilia-Romagna (-3% compared to 2024) and Piedmont (-1% compared to 2024).

As always, our first competitor is Spain, both in terms of export propensity and volumes produced. In 2024, Spanish exports closed with a volume of around 254,000 tons, 2% higher than the previous year. The German market remains the main destination for Spanish strawberries, but in 2024, as for the Italian product, the volume continued to decrease to 73,000 tons (-2% compared to the previous season). The second most important destination was France, with more than 40,000 tons (+12%). This was followed by the United Kingdom, which remained stable at around 30,000 tons (+1% compared to last season) and accounts for 12% of the total. In fourth place is Italy, followed by Portugal and Poland, with a +25% increase in shipments to nearby Portugal and a +3% increase in shipments to Poland, while exports to the Netherlands have decreased (-4% compared to 2023) and represent 5% of the total.

At present (i.e., mid-April 2025), more than 30 percent of the crop has been harvested in Spain. The initial weather conditions at the time of planting were characterized by significant dryness and heat, resulting in losses and various challenges. However, subsequent rains have been beneficial to the crop. The initial harvest, which began around 20 December, was good, but since the end of January, rains and cloudy weather have slowed down the production, with repeated clean-up operations due to excess moisture; the current weather conditions are also causing rotting of the fruit and plants most stressed by this weather pattern. At this point in the season, production is lagging behind the previous year. In the province of Huelva, the main production area in Spain, the area planted with strawberries this season has increased by 2% compared to last year.

In Italy, the commercial campaign is underway, with supplies from the southern regions, particularly Basilicata, where the harvest is around 30%, and Campania, with harvests reaching over 25% of the total.

After transplanting in Basilicata, optimal temperature ranges facilitated adequate tillering. Indoor temperatures in the greenhouses, which maintained satisfactory thermal levels, contributed to the successful development of the crop. However, the weather pattern, characterized by rain, fog and lower temperatures than those compared to last year, delayed the start of production.

In Campania, plants showed consistent quality in the later stages of growth and flowering. This positive development was further supported by favorable weather conditions. Plants showed adequate development, steady flowering and no early start to harvest. Harvesting began in January with the first shoots and by mid-February the volumes harvested were already in line with the average for the period. The favorable climatic trend has continued since then, allowing the plants to thrive and improving the quality of the product at the time of harvest.

The loss of market share in Europe and the fall in orange consumption spell trouble for Spanish citrus growers

Orange consumption has dropped worryingly in Europe, especially among younger consumers, while mandarin consumption is only slightly down, and lemon consumption is holding steady. How could this situation be reversed? This is one of the topics raising the most concerns in the Spanish citrus sector, besides the loss of market share in oranges and mandarins. How will Spain manage to maintain its leadership in the coming years?

The 2024/2025 campaign isn't over yet, but everything points to this year's Spanish citrus season coming to a close with higher prices compared to the last 3 seasons due to a reduction in the supply, especially that of lemons, which are yielding record prices.

Citrus consumption figures in Europe and the United Kingdom, especially those of oranges, show a significant decline. In Spanish households, consumption panels reveal a drop from 22 kg per capita in 2009 to 13 kg per capita in 2024. "The drop in orange consumption raises great concerns and is mainly attributed to a lack of promotion by the sector," said advisor and consultant Paco Borrás at a round table discussion held recently in Valencia.

Antonio Medina, Socomo's Purchasing Director, said that "in large-scale retail, we are not very good when it comes to promoting consumption. You need the support of an entire sector standing together for such initiatives to be carried out."

"We are all aware of what is happening and of the importance of the problem. The room for improvement is so great that what matters most is getting started," said Miguel Abril, Anecoop's Sales Director. "To do something that works, we have to do it all together, as a sector. Promotions at company or regional level, such as those from the PGI Cítricos Valencianos, are good, but we need to make a much greater effort to promote Spanish citrus, and to this end, we need a lot of money," he says. Miguel Abril acknowledged that Intercitrus has made some decisions that are "small, but good steps."

Antonio Alarcón, CEO of Bollo Natural Fruits, which has one of the most representative citrus brands in Spain, said that "if decisions have to be made as a sector, we will be the first to stand behind. No matter how strong one brand or another is; the fall in consumption of Spanish oranges is a collective problem."

"I don't think it's enough to communicate the goodness of oranges. Consumers are increasingly turning to products that are easy to eat and so we have to consider new ways of marketing oranges, including ready-to-eat options. If we always do things the same way, we will always get the same results. If we are capable of offering a unique product that is also consistent in terms of flavor, consumers will repeat their purchases," says Antonio Alarcón.

The loss of market share to emerging third countries such as South Africa, Egypt, Morocco or Turkey, highlights the importance of a unified Spanish marketing strategy that takes advantage of the country's leadership in terms of production, know-how, proximity in the case of the EU, food safety, etc.

"To promote Spanish oranges and mandarins, we would need around 60 million euros a year for at least six years," says Paco Borrás. “I think this might be a good time to create an interprofessional organization for oranges and mandarins in Spain, like Ailimpo in the case of lemons and grapefruit,” he said. “We have not been able to promote the value of our oranges and mandarins. We have sold ourselves too cheaply to retailers.”

While in 1993 there were 773 Spanish exporters, there are now around 150, including 34 cooperatives. Around 350,000 tons of citrus are in the hands of 4 or 5 large groups of producing and marketing companies, which in the last 6 years have joined forces with the backing of large venture capital funds. In Valencia and Castellon, the main orange and mandarin producing provinces, the average acreage of around 70% of the plots is 0.3 hectares. Producers choosing not to join larger projects together with other operators in the sector are finding it more difficult to make their productions profitable and, therefore, to survive.

“The future is in our hands,” said Miguel Abril. “Spain is still the world’s leading citrus grower, and we have to act as such. Competition is becoming increasingly tougher, and growers and companies need to join forces and become bigger to be able to invest in varietal improvement, automation, and, in short, to become more efficient. Things will become increasingly difficult for those failing to do that.”

We were recently in Egypt, and I believe that the gap in quality with Spanish citrus is still huge. Are we going to give them time to learn and win the battle?” said Abril. “I think that, firstly, we need to sort things out in Spain as a sector, in terms of unity and organization. After that, it would be interesting to work in partnership with other EU countries and, later on, see how we can collaborate with other suppliers. It’s not normal that Spanish oranges and mandarins are not represented in the World Citrus Association, for example,” he said.

“With the right quality, we’ll be unbeatable,” said Antonio Alarcón. “Other countries don’t yet have this level of quality, but they’ll have it, eventually, so we mustn’t rest on our laurels.” In this regard, Paco Borrás said that “the future of oranges and mandarins depends on Spain, which should be the one keeping an eye on the products arriving in Europe, including those from other sources, and not the Netherlands, for example.”

Alblas International Logistics:

“To arrive everywhere on time, we switch drivers”

There was a time when transport companies could use timely arrivals as a trump card. These days, just-in-time delivery is a common basic requirement. To consistently achieve that, Ablas International Logistics, which focuses on Germany, Poland, and Eastern Europe, uses a driver rotation system for hauling refrigerated fruit and vegetables, too. Fresh & Fast, as it is concisely worded on this Dutch company’s website, will soon get a makeover.

With 230 trucks and 400 trailers, this family business’s fourth and fifth generations are steadily continuing to build on their predecessors’ success. This logistics company’s primary business is groupage. “If clients want us to, we can take care of the entire process for them: from collecting the goods at the port to unloading at their destination in Europe. Storage and cross-docking are no problem either,” begins project manager Quirijn Albas.

“In the Netherlands, we have our own warehouse, and elsewhere in Europe, we use 13 third-party warehouses spread across Germany, Poland, the Czech Republic, Slovakia, Hungary and Romania. We’re currently looking forward to an additional Dutch location. Repacking at the product level isn’t part of our job description, but we have the means to do all pallet-level operations. You create added value for your customers by handling all logistical processes, including warehousing and transportation,” says Quirijn.

UTILIZATION CAPACITY IS CRUCIAL

Several small transport companies have gone belly in recent years, with some being swallowed by the bigger fish in the pod. “Is it because the smaller players couldn’t offer added value? I think many of those who went under actually had a good basis, service and customer base-wise, for a stable business. But I believe there’s one constant when things go wrong: utilization capacity. Have that in order, and you’re in a good position. Costs get out of hand as soon as you have too many empty trips. Ultimately, in our sector, the cost structure makes the difference. Because on the revenue side, clients don’t seem to pay one logistics service provider more than another.”

By doing things like carefully monitoring their utilization capacity, Alblas has grown over the years, independently and through acquisitions. “We’re expanding at all levels: the customer and personnel base, the vehicle fleet, and transportation movements. Regarding takeovers, we must gain access to the acquired company’s client structure. The regions where those customers are located must also align with our focus,” explains Quirijn.

SWITCHING DRIVERS

To keep their utilization capacity high requires more than just a loyal, broad client base; offering good service is essential. “That’s best done with your own fleet and drivers. Ensuring groupage success with many unloading addresses is easiest when you’re in control. To make sure we arrive everywhere on time, we switch drivers close to the destination rather than having double-manned trucks. For instance, we have a changeover point just outside Hamburg. The driver who had loaded several addresses in the Nether-

lands would have reached their driving time limit by then."

"The fresh driver takes over and can unload in Hamburg overnight or continue on to Lübeck and Rostock. Then there are no driving time issues. Berlin is another good example. Drivers can just reach it within their driving limit, but if you unexpectedly get stuck in a traffic jam, instead of continuing to your final destination, you have to find somewhere to stop and rest. This kind of driver rotation system requires careful planning and organization, as well as a fixed route with a certain amount of cargo," Quirijn continues.

OFFICES IN GERMANY AND POLAND

Albas has offices in Germany and Poland to manage their fixed routes. From there, communication with the delivery addresses is in the local languages. The company gets transport orders from both Dutch exporters and importers in Germany or Eastern Europe. "Some importers have the seller arrange transport, others prefer to do so themselves because it offers them more flexibility when it comes to purchasing policy and offloading options."

EVER-CLOSER TIPPING POINT

Besides client demand and the sector-wide fierce competition, carriers must, nowadays, also increasingly deal with governmental regulations. "Take the hefty toll road charge adjustment we faced last year in Germany. Those per km tolls are on the way in the Netherlands, too. You have to pass that on in product prices, but those changes won't happen easily. The goal is, of course, to bring the tipping point closer to using cleaner trucks. Electric trucks pay a basic toll, but not CO2 tax. That makes quite a difference in Germany," says the project manager.

Still, that tipping point will not be reached any time soon, says Quirijn, especially with diesel prices dropping again. "It's currently more cost-effective to drive diesel, not electric vehicles, particularly in international groupage transportation. A maximum range of 500 km isn't enough when you use a driver rotation system, And it's especially tricky in the Fresh sector when you must park the truck for a few hours to charge the battery. Where I do see possibilities is in, say, collecting multiple regional shipments. Technological progress and increasing CO2 taxes on diesel will push the international transportation sector towards electric vehicles, too."

BIODIESEL AND HYDROGEN

In the short term, Quirijn sees more benefit in biodiesel to reduce transport's CO2 footprint. "You can save plenty of CO2 with a slight price adjustment. Unfortunately, the hydrogen route is perhaps not receiving full attention. The basic issue is the too-high cost price because production hasn't yet gotten off the ground. Several technical issues must also be seen to, like insulating the tank and cooling the hydrogen to keep it liquid. Nevertheless, I think hydrogen will make its appearance in the transportation sector in the future. Alblas keeps its finger on the pulse. Because if you don't move with the times, you'll eventually fall by the wayside," Quirijn concludes. (PB/PDC)

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The product group with the highest degree of innovation at Heemskerk fresh & easy is the freshness packages

Heemskerk fresh & easy:

“Simple meal salads meet a need”

Convenience products are becoming increasingly popular and terms such as convenience, on-the-go, ready-to-eat, and instant have become commonplace. The fruit and vegetable sector jumped on that bandwagon, too. Heemskerk Fresh & Easy, one of the largest vegetable processing companies in the Netherlands, specializes in this. Its innovation department keeps a constant finger on the pulse, and the company regularly develops new products that meet current needs. This summer, simpler meal salads will be rolling off their production line. Xandra Plug and Simon Kloos explain why.

“Our shopper survey shows that ready-made salads are under pressure,” begins Xandra, Heemskerk’s Marketing Manager.” That’s not so much due to competition from fresh produce or ready-made meals - a completely different convenience sector category - but mainly because of high prices and changing consumer behavior. Also, although people are once again somewhat more positive about their financial expectations, they’re very price-conscious. Price is the deciding factor, and there’s a greater preference for discounters.”

BASIC SALAD

The team, thus, set out to see where the need lies. “Simpler, cheaper salads could be the answer. So, for this summer, we’ve developed basic 250 g salads consisting of iceberg lettuce and two vegetable toppings: tomato and cucumber. No croutons or pasta, just a sachet of dressing. It costs about €2 in stores and is nothing but a tasty salad. You can have it for lunch or add chicken, croutons, or cheese for dinner at home. People sometimes like adding their own personal touch,” says Xander.

The leafy vegetables are washed

This basic salad is not the only new addition to Heemskerk's retail range. "There's also ‚easy wok', which stems from another trend: people want to cook tasty, healthy meals quickly. Nowadays, people would rather not spend more than 20 minutes in the kitchen. That wasn't the case at the turn of this century. Besides vegetables, this meal contains chicken, carbohydrates, and sauce. You put everything in a wok, and six minutes later, it's ready to eat."

"Because it's even more convenient, this concept will probably compete with stir-fry vegetables in stores. But also, especially with ready-made meals because this stir-fry convenience offers a complete meal solution. It appeals to consumers who want healthy, tasty food but want to do something themselves. People experience putting a ready-made meal in the microwave as something they have less influence on and is, thus, less healthy," Xandra explains.

INSPIRATION, RENEWAL, AND SOMETHING NEW

Yet, according to Product Development Manager Simon Kloos, fresh packs are Heemskerk's most innovative product group. "We introduce new concepts to this product group five times throughout the year. That's more than twice as often as the other categories. The underlying idea is that you must challenge shoppers by offering innovation in meal options. There are more and more world dishes appearing, most of which you get by adding the right combination of spices," he says.

Xandra adds that recent research revealed that four percent of households buy meal boxes, while 50% buy meal and soup fresh packs. "These are in traditional flavors, but you shouldn't underestimate the search for inspiration, innovation, and something new. You can now buy such fresh packs at almost every Dutch supermarket. Pre-cut fresh food packages are on the rise, too, but these are for smaller households and are slightly pricier. They are slightly more convenient, though."

HEALTHIER EATING

These days, convenience, says Xandra, is the best way to get people eating more fruit and vegetables. "You can enjoy a ready-made salad or our wok concept that contains the minimum recommended daily amount of 250 g of vegetables. It seems many people don't reach that portion every day. We, therefore, want to inspire consumers and make it easier for them. For some, that will be a bag of lettuce; for others, a tasty soup. We try to map out those needs and respond to them," he explains.

FOODSERVICE AND FOOD INDUSTRY

Besides the retail sector, Heemskerk increasingly supplies pre-cut products to the food service (restaurant chains and QSR) and the food industry. The company always focused on the Netherlands, but it now wants to introduce its processed vegetables to other markets, such as Scandinavia and the DACH countries. "It's becoming harder for companies to hire people, and labor costs have risen sharply. Supplying the foodservice and food industry with pre-cut fruit and vegetables is part of the solution. The food industry, especially, seems to be looking for larger manufacturers because, at a certain point, small processing plants can no longer handle the enormous volumes needed," Simon explains.

VEGETABLE SPECIALIST

Heemskerk does not process the cut fruit it supplies to customers. "Until recently, we did that, but since last summer, we've strategically partnered with Fruity Pack. Each company has its specialty; ours is vegetables, salads, and fresh produce packs. Last year, we also began working with Bio Brass for organic beets. It's always challenging for us to process organic produce. That, along with the previously difficult availability, is why our organic range is smaller. Nevertheless, we're looking into the possibilities. We did a little kale and pumpkin in the winter, and we want to expand that segment further next winter."

"ROBOTS DON'T GET SICK"

In addition to roughly 1,100 workers on the floor, robotization and automation are important priorities for Heemskerk. "Efficiency is high on our wish list. In the last few years, we've robotized a lot to be less dependent on people, particularly in order picking. Automation has taken over 30 people's work per shift. The robots work 24/7 and never get sick. All they need is a lit-

Robotization in order picking

Wide range of fresh salads

Fresh packaging cauliflower soup

Mexican wok vegetables

tle maintenance now and then," Simon points out.

Their iceberg lettuce processing has also recently been automated. "Instead of ten people on the assembly line, a single robot now de-cores and halves that product. But, there are production lines where most of the work is still done by hand. It's not profitable to do everything by machine, especially for small batches. As we expand to other countries, some of the manual work can be automated, although Scandinavia has its own preferences and products. You can't simply export everything we have in the Netherlands to Germany or Scandinavia. Sometimes you have to provide customization."

SPAIN AS A SUPPLIER

Heemskerk tries to source as much as possible from local growers. However, buying from Spain and other countries is unavoidable, given the seasons and the weekly volume of 3.3 million units of processed vegetables, lettuce, fresh packs, and ready-made salads. "You can only achieve supply security through good distribution, especially with climate change. We sign contracts with growers in different areas. That applies to Spain, too, where we don't focus on one province. Half of our purchasing department spent almost the entire January in Spain. Instead of buying from here, they directly contacted growers while also finding new sourcing areas and partners. Heemskerk certainly isn't resting on its laurels," Simon concludes.

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Peruvian Organic Banana Sector Adapts

New strategies against fusarium and drought

in northern coastal Peru, particularly in the Chira Valley (Piura region), organic banana production has become one of the most representative activities of family farming. More than 9,000 smallholders — most managing plots of less than one hectare — have sustained a value chain that has endured climatic, phytosanitary, and logistical challenges, relying on innovation, cooperative organization, and diversification.

Since the early 2000s, Peru positioned itself as one of the world's leading exporters of organic bananas. However, since 2017, production has shown a downward trend, mainly due to the increasing frequency of extreme weather events such as torrential rains, prolonged droughts, and the spread of diseases such as Fusarium Tropical Race 4 (TR4).

EXTREME WEATHER AND REORGANIZATION OF THE PRODUCTION MODEL

Carlos Huamán, representative of CEDEPAS Norte — an organization with over 40 years of experience in rural development and technology transfer — notes that climate change is currently the sector's most pressing challenge. "In 2023 we experienced heavy rains, and in 2024, a drought lasting nearly six months, which directly affected production and highlighted the need to modernize water access systems," he explains.

In response to these limitations, cooperatives have begun drilling tubular wells, implementing water harvesting systems, and optimizing legacy irrigation infrastructure. Kelvin Atoche Escobar, commercial manager of the cooperative alliance Norchira, reports a 20% to 30% drop in fresh fruit production compared to the previous year. "At the same time, it pushed us to seek more sustainable solutions," he adds.

NORCHIRA AND THE PUSH TOWARD DIVERSIFICATION

Norchira is an umbrella organization uniting three major cooperatives from the Chira Valley: APPBOSA, Usuarios Río y Valle, and APBOSMAM. Its cre-

ation responds to the need to consolidate efforts and pursue economies of scale in a context of high logistical costs in Peru. "Joint negotiation has significantly reduced transport, input, and packaging costs," says Atoche.

After more than two decades focused on fresh banana exports, Norchira is now entering a new phase centered on the processing of non-export-grade bananas. Beginning in 2025, the organization will launch exports of banana purée and organic dried banana, products aligned with rising European demand for healthy snacks and natural goods. "We have the capacity, the raw material, and access to a market that demands it," Atoche states.

Banana purée is produced from fruit that does not meet fresh export standards. Approximately one kilogram of purée is obtained from two kilograms of fresh banana. It is marketed at prices ranging from USD 1.40 to 1.50 per kilogram and shipped in 220-kg aseptic tanks. This alternative allows producers to add value to fruit previously sold domestically at low prices, improving their income stability.

AGRICULTURAL INNOVATION AND FUSARIUM MANAGEMENT

One of the sector's key phytosanitary threats is the presence of Fusarium TR4, first detected in Peru in 2021. This soil-borne fungus can remain active for up to 40 years, making its containment a national priority. As part of the "Strengthening the Organic Banana Value Chain" project — co-financed by the Swiss Cooperation (SECO) and implemented by CEDEPAS Norte — technical packages are being developed, including the use of biofertilizers, beneficial microorganisms, and soil enhancers, along with strict biosecurity protocols.

In parallel, field trials are being conducted with support from SENASA, CIRAD (France), and Agrofair to introduce TR4-resistant banana varieties. "If these varieties adapt well, it would be a major step forward for the long-term sustainability of organic banana cultivation in Peru," says Huamán.

CERTIFICATIONS, LOGISTICS, AND MARKET ACCESS

Organic and Fairtrade certifications remain key tools for accessing premium markets, particularly in the United States (which accounts for 54% of exports), as well as the Netherlands, Germany, and Italy. However, market dynamics are evolving, and profitability is under pressure. According to Norchira, demand for Fairtrade bananas has declined. "In 2018, 95% of our fruit carried the Fairtrade label. Today, it's only around 70%. The rest is organic but uncertified, and sells

at prices that often fall below production costs," Atoche points out.

Adding to the pressure are high logistical costs. The shortage of shipping containers and disruptions at ports have negatively impacted competitiveness. "Rescheduling and delays result in additional costs that reduce smallholder margins," Huamán adds.

OUTLOOK AND SECTOR SUSTAINABILITY

The Peruvian organic banana sector is at a turning point. On the one hand, it remains a sustainable option, rooted in environmental and social responsibility. On the other, it must rapidly adapt to a shifting global context. Product diversification, modernized irrigation and soil management, disease control, and stronger cooperative organization are key pillars in the current development strategy.

Over the next five years, the sector aims to stabilize production levels, enhance value through processed exports, and reinforce its presence in organic markets.

As Atoche concludes: "We are moving forward with a positive vision — toward a value chain that is fairer, more efficient, and more sustainable, ensuring decent prices for producers and quality products with traceability and social value for consumers."

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Rob Euser, Fresh Del Monte:

“In 2024, Europe imported 4% more bananas”

In 2024, bananas maintained its reputation as a consumer favorite. Yet, rising prices and the advance of diseases and climate change mean strategies must be adjusted, Fresh Del Monte reports. The company focuses on banana cultivation, marketing them in more than 80 countries worldwide. Primeur spoke with Rob Euser, Commercial Director of Del Monte Holland, about segmentation, the demand for premium bananas, research into new cultivation methods, and whether the market has room for a different banana besides the trusty Cavendish.

How is the European banana market faring? It is still the No. 1 fruit?

“Consumption data confirms bananas’ hold as the highest valued fruit in Europeans’ shopping baskets, even in an economically difficult year like 2024. We did research that shows bananas are consistently ‚the most loved fruit’ among consumers and that over 9 out of 10 households include them in their meals. Their year-round availability, consistent flavor, and versatility – as a dessert, snack, baking or smoothie ingredient, and so on – make bananas irreplaceable. European customs statistics confirm this consumption dynamic and show a further increase in import volume of more than four percent in 2024.”

Banana prices are rising. How does that affect the market? Are there, say, fewer promotions? And, in light of that, how do you see the premium banana market?

“Several factors have affected banana cultivation and distribution costs since the post-pandemic economic cycle. Yet, bananas still have the best price-quality ratio of fruit Europeans can buy every day. Consumer research shows that over 80% of people recognize the benefits of bananas, with convenience being the most important consideration, followed by flavor and nutritional value. That keeps the pressure on retailers to have banana promotions high.”

“As a sizable grower and distributor, Fresh Del Monte focuses on clear segmentation for our partners. The demand for premium bananas – perfectly sized and ripened, with guaranteed sustainable cultivation according to the highest social and ecological standards – is steadily rising. It’s vital for our sector’s future to raise awareness about the added value of high-quality, sustainable bananas, both for consumers and the environment.”

How do climate change and emerging diseases like TR4 impact banana production and supply? Does the crop, for example, have to change?

“TR4 directly threatens Cavendish bananas’ availability and supply. In collaboration with the Queensland University of Technology, we’re at the forefront of innovations aimed at developing disease-resistant bananas. We want to find

new cultivation methods that decrease bananas' susceptibility to TR4 while also contributing to a more sustainable food supply. Our tropical research teams are also actively working on hardier, sustainable production systems. We've introduced strict measures on all our plantations to prevent the spread of TR4, and are working with governments to introduce national biosecurity measures."

"Also, we've further expanded our regenerative agricultural efforts. We want to maintain and improve our soils' productivity. For instance, we're mapping high water risk production regions to better align investments to mitigate water shortages. We partner with other stakeholders to protect and conserve river basins to guarantee future water availability. Given climate change's growing impact, it's essential to develop more resilient production systems and thus safeguard banana cultivation's future."

Diversification is sometimes used as a strategy to combat climate change and disease. Is your company working on that, and do you see room on the market for other banana varieties besides Cavendish?

"Cavendish bananas remain essential for a stable, year-round supply and meet European consumers' expectations. That's why we emphasize how important scientific research is in guaranteeing this variety's sustainability. But, we're also further expanding our plantain supply in Europe, particularly in markets where growing ethnic cuisines and communities are creating a strong demand for fruit at different stages of ripeness. Bananas are generally increasingly being used in new consumption moments and culinary applications. The emergence of varieties that have, so far, been unfamiliar to Europe should increase. It will, though, be some time before they start playing a significant role in the market."

What developments are there in the area of Social Responsibility regarding bananas?

"Fresh Del Monte ensures that employees involved in all our banana activities have access to essential health care, education, and schools. We also offer support regarding transportation and housing. To promote our workers' well-being, we regularly organize recreational activities that stimulate physical health and strengthen social interaction outside of work. We're committed to local communities, too, through volunteer work."

"We clean residential areas and national parks, plant trees, and provide environmental education to school children. We also support education in the regions in which we operate by donating school supplies, scholarships, and books. In 2023, for example, our banana plantations in Costa Rica donated more than 100,000 USD and distributed 5,600 school kits. To encourage a healthy, nutritious lifestyle, we regularly donate bananas to churches, hospitals, clinics, schools, and social organizations in the communities in which we're present." (MW)

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Why a tech company acquired a global importer and exporter of citrus

The fresh produce industry is witnessing consolidation. "We're observing this trend globally, but it's particularly evident in the northern hemisphere," says Juan Gonzalez Pita, COO of Salix Fruits, an importer and exporter of fresh fruit. Aging business owners, a lack of generational transition, escalating costs, and increased investor interest are some of the logics behind the sale of company. For the buying company, an acquisition generates economies of scale and could be a way to quickly expand into a certain space. "Many of these acquisitions are driven by private equity firms," Gonzalez Pita said. "This is particularly the case in family-run businesses that don't have a clear succession plan. In that context, acquisition becomes a natural path."

Salix Fruits Juan Gonzalez Pita

However, the use of increasingly advanced technology and the desire to drive the produce industry forward with the help of technology has recently prompted more and more investments from tech companies. An example is California-based GrubMarket that made numerous acquisitions in the produce industry in recent years. GrubMarket is a food technology company based in the Silicon Valley, the heart of the tech industry in the United States. Their mission is to transform the fresh produce industry through technology. "They don't just want to improve the status quo, but their goal is to achieve something no one has done before," commented Gonzalez Pita. "They want to truly revolutionize this industry through technology, not just consolidation."

With this mission in mind, they acquired the first fresh produce company back in 2020. Since then, the company has been on an acquisition streak and more than 50 acquisitions have been made in the past five years. Salix Fruits was acquired in 2022 and some other U.S. produce companies that have been welcomed into the GrubMarket family include Sierra Produce, SunFed, Sally Produce, A&B Tropical Produce, and Bengard Marketing. Just in early April, the company announced the purchase of Delta Fresh Produce.

ALIGNMENT
GrubMarket's vision and values very much align with those of Salix. "Innovation has always been at our heart and technology is part of our DNA as we were one of the first companies in our sector to launch an app that allowed us to communicate with our customers," Gonzalez Pita said. "When GrubMarket approached us to be acquired, we felt a strong alignment. This wasn't just a sale; it was a unique opportunity to join a much larger and forward-thinking ecosystem."

Joining GrubMarket in 2022 allowed Salix to become part of a family of over 70 companies, backed by a $3.5 billion valuation. While Salix's core activities haven't changed, Gonzalez Pita shares how the acquisition has created synergies and how Salix and the other companies in the GrubMarket family benefit from each other's presence. "We are now part of a strong network that gives us protection, access to shared knowledge, as well as scalability in many areas of the business."

SPECIALISTS
The company's core activities have remained the same since the acquisition and so has Salix's management team and organizational structure. "We have an agile structure and a keen eye for spotting emerging market trends. If I had to describe Salix in one word, it would be "specialists". Combined, our management team has more than 100 years of experience in the produce industry, and we know both the production side of the business and the commercial side very well. We continue to provide tailored solutions for both our growers and customers globally that best meet their individual requirements."

DYNAMICS IN THE CITRUS MARKET
Up until the acquisition, Salix was run by four partners and a team of 25 people. The company's two main lines of business included importation and global cross-trading. With offices in eight different countries, the company was internationally structured. Today, those activities have remained unchanged. While fresh fruits are imported globally, South America is the most significant procurement region with citrus being the dominant commodity. "In citrus procurement, Argentina, Chile, Urugay, and Peru are the main countries and we've recently added Egypt, which has become a very important origin for us. In addition to these countries, South Africa is a key player in our global citrus sourcing structure."

This time of year, citrus is the main focus, and Gonzalez Pita describes the season as unusual. While there is a decent supply of lemons in the U.S., Europe has been hit by a strong frost in Turkey and other Mediterranean areas. "As a result, we expect a shortage of lemons towards the end of the European season."

EUROPE IS A CHALLENGING MARKET
Most of Salix's products find their way into the U.S. and Canada, as well as Latin American markets. "In addition, the Middle East and Russia are significant markets for us." The company also ships substantial volumes of citrus into Europe, mainly from Argentina and South Africa. While Europe remains a strategic market, it is challenging at the same time. "It is highly regulated, especially in terms of phytosanitary controls. These often function as non-tariff barriers." In addition, there is strong protectionism towards local citrus from countries like Spain and Italy. It's very dynamic and the situation changes every year. "Within Europe, Germany, France, the Netherlands, and Spain are the largest buyers of our fruit. However, due to regulatory complexity, we need to be extremely careful and adapt quickly in order to be able to keep supplying these countries."

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Bergeijk Logistics:

“Despite sky-high road tolls, electric transport to Austria isn’t an option yet”

An Amsterdam-Vienna return trip costs transport companies €950 in tolls. Electric vehicles could be exempted, but those face the problem of far-from-adequate charging infrastructure along that route. Dutch company Bergeijk Logistics specializes in temperature-controlled groupage transport of flowers, plants, fruit, and vegetables to Austria.

This company is located at the Flora-Holland flower cooperative in Aalsmeer, the Netherlands, and makes daily trips to and from Austria with its fleet, supplemented by fellow transporters’ services. “We drive directly to distribution centers, wholesale markets, garden centers, and even flower shops. Our trucks have tailgates, so we can deliver directly to customers without loading docks. We also supply two of our distribution centers in Austria. From there, an Austrian company with whom we have a joint venture provides further distribution with smaller vehicles,” begins Bergeijk Logistics’ owner, Frans van Bergeijk.

WANTED: YOUNG DRIVERS

He says, unlike in the past, yellow license plates (used in countries like the Netherlands) are becoming increasingly rare on the highways south of Frankfurt, Germany. “Eastern European companies and drivers have largely taken over the logistics market. Those haulers are often branches of Western European logistics companies. A truck costs about the same everywhere, and everyone pays for diesel and tolls.”

“The difference, though, lies in the labor costs. That’s a significant part of the total costs. Also, even Western European companies increasingly use drivers from Hungary, Romania, and other neighboring countries. In the Netherlands, there are simply too few young drivers entering the market. That affects us, too, despite offering decent vehicles and good salaries. Much has changed since the turn of this century,” says Frans.

NO PROFIT IN ELECTRIC

Both Germany and Austria charge tolls of over €0.40/km. “German rates skyrocketed in December 2023, and in Austria, they’ve risen again this year. Currently, we pay €580 for a return trip to Germany and around €370 in Austria, depending on the final destination. Electric vehicles could be exempt, but presently, they’re not a viable option for us. Their range is too limited, and the charging infrastructure is insufficient. An electric vehicle isn’t powerful enough to get you to Frankfurt, about 450 km away.”

“Also, there are too few charging points, which means a lot of time is lost. Our home base, the Flower Auction, has no charging facilities, and in the whole of Austria, there’s only one, near Linz. It’s hard to calculate electric vehicle costs at the moment. Their running costs are easily four times that of vehicles that use fossil fuels. You’d then have to charge your customers more. But what client would accept paying more because you drive an electric vehicle? Nevertheless, I can imagine this mode being feasible for shorter distances, such as trips to and from Paris,” Frans admits.

Bergeijk Logistics sometimes has two drivers per truck. That has several benefits, like getting goods to their destination quicker, less stopping - “there are few stops along the German Autobahn”- and the drivers can drive through the night. “Driving at night is a big advantage because traffic in Germany has ballooned over the past decade. The many diversions and roadworks also cause significant traffic jams during the day. Fewer rest breaks and overnight stays also reduce the risk of theft, although we don’t usually have much trouble with our flowers, plants, fruit, and vegetables. We don’t transport iPhones, after all.”

LHVS ARE AN OPTION FOR THE FUTURE

The logistic expert says they could boost efficiency by using LHVs (Long Heavy goods Vehicles). “We don’t need to enter villages, the trucks drive directly to our depots in Austria. You’d usually need three trucks, but we can do it with two. That saves on labor costs and fuel and reduces CO2 emissions. It’s also safer

Driver shortage threatens European logistics sector

According to current data from the International Road Transport Union (IRU), 31.6% of current drivers in Europe are over 55 years old, while only 6.5% are under 25. 600,000 drivers could retire in the next five years if there aren't enough young drivers willing to take over, TTM.co.uk, the magazine for private and commercial transport, wrote earlier this month.

Nevertheless, the profession remains attractive. According to the Truck Driver Barometer, 81% of European drivers are satisfied with their jobs. Wages are also attractive: In almost all countries surveyed, wages are between 30% and 135% above the minimum wage. The problem, therefore, is not retaining staff, but attracting new employees, as confirmed by FMB and Bergeijk Logistics, among others. Frans van Bergeijk: "In the Netherlands, the influx of young drivers is simply too low. We suffer from this, too, even though we offer our drivers clean vehicles and good salaries." High training costs, complicated regulations, and minimum age requirements deter young, potential drivers. Poor infrastructure and a lack of facilities also hinder the influx of young talent. According to recent estimates, there is a shortage of around 100,000 truck parking spaces in Europe, and only one in 10 existing parking spaces meets safety standards.

Source: www.ttm.nl

because there's less weight per axle. But I haven't received a permit from the Austrian authorities. I suspect they're concerned that some of the goods that go by rail – the Austrian rail network is well developed – would be diverted to road transportation. If they give me a permit, they'd have to allow others to do the same," Frans explains.

DIGITIZATION

Electric vehicles may still face various hurdles in the professional heavy road transport sector, but CO2 emissions are an issue you cannot ignore, especially given the CSRD legislation that will be gradually introduced in Europe in the coming years. That obliges large companies to report on sustainability aspects, including their and their suppliers' CO2 emissions. "Tracking that per trip will become an additional administrative burden and expense. I fear several small transport companies, discouraged by these government requirements, will eventually throw in the towel. Still, this isn't the only reason for further concentration in the transportation sector. The increase in scale among customers also plays an important role."

Bergeijk Logistics is well on its way to digitizing its processes. "We're ISO-certified and professionally organized. The reporting requirements don't make things any easier, but we'll tackle what comes our way professionally. Plus, I'm sure various parties will soon offer software to support this process. There's no denying, though, that this will be yet another expense. Several areas are being digitized. I'm, however, not pessimistic about the future. We have a nice niche in Austria with our flowers, plants, and fresh produce specialization. And those who excel in niche markets can usually still make a living," Frans concludes.

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Evers Specials wants to rejuvenate sprouts' image:

"We won't stop until organic sprouts are on every shopping list"

Evers Specials believes bean and other sprouts should be on every shopping list. Although this Dutch company's products are entirely organic, they put a limited emphasis on that. Sales manager Koen van Kessel explains what factors they consider.

That idea sprouted in the past. Harry Evers started a mushroom farm in 1962. Though successful, competition became increasingly fierce. He ultimately decided to switch entirely to growing bean sprouts. The influx of Asians into Europe brought Chinese restaurants to the Netherlands. That meant the demand for this product skyrocketed. That market and the production processes were still in their infancy, so optimizing traditional cultivation methods became necessary. Thus, Evers Specials was founded. As each bean sprouted, the company's passion grew. In the years that followed, Evers Specials transformed into a true expert.

SHAREHOLDERS: KOEN VAN KESSEL

Automation and technological developments that increased production capacity characterized the company in the first years of the new century. Cleaning lines, filling areas, and new loading docks were built, and they added cold stores. Six years ago, Koen van Kessel started as sales manager at the now highly developed Evers Specials. Besides his sales responsibilities, Koen had to professionalize the logistics system to shorten the chain. "Bean sprouts have a limited shelf life. From packaging to delivery must take only 12 to 24 hours," he begins.

"Delivery reliability is crucial, and that's only possible if you do the logistical planning in-house and can adapt it to customers' schedules." Koen managed to achieve that optimization in a relatively short time. As thanks, Evers Specials' shareholders - current and former bean sprout growers - gave him the chance to buy into the company. Koen did not let that opportunity pass him by. He has been a share-

Harold and Koen during Biofach

Popular in German retailers:
Bean protein, a young sprouted bean mix based on mung beans, lentils, green peas, and chickpeas

holder for three years and is responsible for all logistical, marketing, and sales processes, among other things.

RANGE EXPANSION

For some, the pandemic is fast becoming a faded memory. Not for Koen. It marked the acceleration of realizing a long-anticipated market opportunity, transitioning to small packaging, and product assortment expansion. "Just before the pandemic, demand from restaurants was noticeably declining. During the pandemic, that trend grew, and demand was also coming under pressure in a broader sense. We, thus, decided to diversify horizontally and vertically. That meant we switched to focusing on small packaging for bean sprouts," says Koen. That strategic decision resulted in Evers Specials investing in new refrigerators and modifying its building.

"It was nerve-wracking, but I'm so proud that the organization and shareholders could do that repositioning together." That successful implementation has broadened the company's client portfolio, allowing it to respond more effectively to market fluctuations. "A crucial second policy point is concentrating our output towards Germany. We got the chance to acquire sprout processing machinery in Hamburg, which gave us direct access to the German market. Their requirement was that bean sprouts must be able to be combined with other sprouts. That acquisition and diversification means the [German] retailer Edeka now, happily, offers our full range," says van Kessel.

STRATEGY

Koen wants to make bean and general sprouts even more popular and sees it still has potential: "It's easy to use bean sprouts in the kitchen; that's an advantage. All you need to do is add them to your dish for two minutes, at the last moment. It's a delicious, healthy product, rich in vitamin C. For young people in particular, who have little time to cook, it's a great solution to have various vegetables that complement their lifestyle: fast, healthy, and convenient." Evers Specials' motto is ‚Bean and other sprouts should be on every shopping list', and that has recently rapidly been given shape and substance.

There is, however, a modest emphasis on those beans being 100% organic. "We don't want to use that to encourage non-organic consumers to eat sprouts. It must be solely based on healthy, easy, and tasty values," Koen explains. A third strategic point of attention is purchasing distribution. "We sprout beans from mung beans, which we mainly purchase in Asia, and that's fine. But given the global developments characterized by the risk of increasing volatility, we're forced to reorient our purchasing policy. Spreading the risks doesn't only apply to our client portfolio, but equally to the purchasing market."

SOCIAL ORIENTATION

For Koen, doing business while respecting nature, the environment, and society is what sustainability is all about. "We work according to the Ethical Trading Initiative (ETI) basic code and are Planetproof certified. We, obviously, also operate within the legal regional and (inter) national environmental frameworks. Plus, we're always looking for new ways to minimize our production process' ecological footprint while maximizing the value for our partners," he says.

They have launched several projects that should help reduce the company's CO2 footprint by this year. "An important one is seeing if we can reuse the heat released while the beans sprout and adding that to our water heating system. According to the calculations, if successful, we could reduce our gas consumption by roughly 20%."

Besides focusing on business development and process optimization, social orientation is gaining increasing traction via initiatives Evers Specials takes regarding community aspects. "We co-founded the European Sprouted Seeds Association (ESSA). From there, we work closely with growers who cultivate our mung beans. We play a leading role in the ESSA, where I'm a board member. We jointly look for new solutions and collaborations, think outside the box, and experiment. We're up for the challenge. We roll up our sleeves and give it our all every day because our successes should impact our growers and customers' quality of life, too," the sales manager says.

AUTOMATION

He wants the whole company to be where it can create value. Not only for itself but for the entire chain, whether it concerns quality, product innovation, food safety, technical developments, or improving the vegetable sector. "We're always ahead of the curve. We use our know-how and experience to innovate, expand, and improve the international bean sprout and sprout market." For 2025 and well beyond that, a critical focus is automating the administration process as a whole. "Artificial Intelligence offers great potential, but as those opportunities arise, we must pay attention to the security risks using AI poses," Koen points out.

Flowpak 200 g bean sprouts

A line of thought that has become increasingly concrete over the past two years is whether Evers Specials could shift somewhat to direct interaction with consumers, so from B2B to business-to-consumer (B2C). "It's a fundamental issue. The most realistic approach is to keep developing a B2B policy for the wholesale/food service sector and, in parallel, for the B2C market."

A first step towards accomplishing that is implementing an Enterprise Resource Planning (ERP) package. "We can then concentrate on the processes' input side, allowing us to adjust more quickly and flexibly without compromising the organizational level we want," Koen continues. "Implementing market demarcation on a fundamental level will lead to two basic administrative processes: the B2B and the B2C segment."

"We also want to develop our Western European market even more actively. We can deliver within 12 hours in a radius of 800 kilometers, 90% of the time. We'll continue guaranteeing that. All our logistical efforts are focused on that. We want to intensify our marketing communication efforts, too, because we won't rest until organic sprouts are on everyone's shopping list," Koen concludes.

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EU fresh produce PDOs and PGIs

Genovese basil, Cavaillon melons, Ribera del Xúquer kakis, and Opperdoezer Ronde potatoes. These four well-known regional products have a little something extra: they are proud geographical indication title holders. The European Union has recognized 305 unprocessed fruits and vegetables with a Protected Designations of Origin (PDO) or Protected Geographical Indications (PGI), with 14 more on the waiting list. Unsurprisingly, two-thirds of these products are grown in southern Europe.

The EU uses geographic indications to protect regional products within its territory from being counterfeited. These products' unique characteristics relate to their place of cultivation or production and possibly traditional knowledge. "To register a product name, an EU producer or producer group must describe the product's traits and, where applicable, its link to the geographical area," states the European Commission's Agriculture and Rural Development website. "The application is submitted to the national authorities and then forwarded to the European Commission, which scrutinizes the application."

eAMBROSIA DATABASE

The EC distinguishes between PDOs and PGIs for foodstuffs and agricultural products. This article discusses fruits and vegetables, including potatoes and nuts, but not legumes and tropical fruits. One-fifth of the 1,506 geographical indications for food products (including cheeses, meat preparations, bread and pastry products, and oils, excluding wines) relate to fresh produce. You can check the eAmbrosia database on the internet for a complete overview.

MARKETING DOES NOT ALWAYS GUARANTEE SUCCESSFUL

Consumers can trust the quality of PDO and PGI products, while growers and producers can better market these. These quality labels have a marketing function, but each product's added value differs. In 2013, the European Commission hired the market research agency Areté to conduct a study. It found that products with a geographical indication generally fetch higher market prices than similar standard products. However, that additional price was lower for the fresh fruit and vegetables than processed products. Also, only half of the surveyed fresh produce with a geographical indication were more profitable than their standard counterparts.

Various non-European Union countries also protect their regional products. The EU now recognizes the geographical indications of 223 food products from those countries, including China, Turkey, and South Africa. That waiting list has 50 products. Conversely, non-EU countries recognize certain European geographical indications. In Japan, that number is already 305.

PDO VS PGI

Fruit and vegetables registered as PDO are more closely related to where they are cultivated than PGI products. Genovese basil, Ribera del Xúquer kakis, and Opperdoezer Ronde potatoes are all grown in strictly defined areas (PDO). Cavaillon melons, which received PGI recognition last month, are yellow Charentais-type melons that are part of the French city of Cavaillon's heritage. However, these melons are more widely cultivated geographically, including in Vaucluse and the Alpes-de-Haute-Provence. A third (105) of fresh produce have protected designations of origin; the rest (200) have protected geographical indications.

In France, PDO is called AOP (Appellation d'Origine Protégée), in the Netherlands it is BOB (beschermde oorsprongsbenaming), in Germany, it is g.U. (geschützte Ursrprungsbezeichnung) and in Italy, Spain, and Portugal, it is DOP (Denominación de Origen Protegida). Some PGI counterparts are BGA (the Netherlands), IGP (France, Italy, Spain, Portugal) and g.g.A. (Germany).

RINCÓN DE SOTO PEARS

Every PDO and PGI prioritizes product specifications. Take the first pear with a protected designation of origin, granted in 2004, as an example. The Rincón de Soto pear is cultivated in the Ebro Valley in the La Rioja region in northern Spain. Pears have grown in that area for over four centuries. The PDO refers to two varieties (Blanquilla, first mentioned in historical documents in 1747, and Conference, bred in England in 1860). These are cultivated in 28 villages on a total of 1,200 hectares. The PDO has 290 members (growers, packing facilities, and trading companies) but is open to expanding its membership and acreage.

A supervisory board promotes the product, guarantees traceability, and monitors specific quality requirements. In the case of Rincón de Soto pears, the product specifications describe this fruit as elongated, larger, sweeter, and slightly greener, with a somewhat rougher peel than other Conference pears. The growing region's climate and geographical characteristics and grower expertise influence these traits, like flavor.

These specifications carefully detail these regional-specific pears' particular characteristics. The peel roughness is thus described: "Due to the valley's high elevation and the proximity of rivers, it is often foggy in the morning, which gives way to bright sunshine. The moisture on these Conference pears peels evaporates quickly. That gives the pears their typical russeting in an entirely natural way. No chemicals are needed to roughen the peel."

To be marketed as Peras de Rincón de Soto, the pears may not exceed 6.12 kg/cm2 firmness and reach a Brix value of at least 13. They may also not be smaller than 58mm for Blanquilla pears and 60 mm for Conference pears. Regarding cultivation management, no chemical products may be used during thinning and at harvesting, no more than six hours may elapse between picking and the pears arriving at the packing facility.

The geographical indication supervisory board determines the defined cultivation area. While Rincón de Soto pears are currently grown on 1,200 hectares spread over 28 municipalities – in the first year of recognition, there were only four – other PDOs are much stricter. Opperdoezer Ronde potatoes, available from late May to late October, "may only be grown in 100 hectares of silt soil around the Opperdoes church [in the Netherlands]."

SOUTHERN EUROPE DOMINATES

The first PGI was granted in 1996. For fruit and vegetables, that involved 51 regional products. Pioneers include Spanish Vinalopó grapes, Sicilian blood oranges, Portuguese Douro almonds, French pink Lautrec garlic, and Dutch Opperdoezer Ronde potatoes. The latest additions (2024 and 2025) are Ludbreski horseradish from Croatia, Baronnies apricots and the aforementioned Cavail-

CONSORZIO DI TUTELA DEL POMODORO SAN MARZANO DELL'AGRO SARNESE NOCERINO DOP lon melons from France, Wedzone apples from Poland, green asparagus from Guadalajara in Spain, cauliflowers from Piana del Sele in Italy, and sweet potatoes from Madeira in Portugal.

In 1996, no fewer than 80% of the trendsetters were grown in southern Europe in countries like Greece, Italy, Spain, and Portugal. That trend has continued in the years since, right up to the present day. Of the 305 European fruit and vegetable products with a PDO or PGI, 198 are grown south of the Balkans, the Alps, or the Pyrenees. Italy leads the way with 103 representatives, accounting for a third of all quality seals related to region and tradition.

If we include France - where growers in the south cultivate most of its 44 designated products - in those Mediterranean countries, that figure reaches 242. Germany and Hungary hold their own with 18 and 15. But Northern and Eastern Europe is underrepresented. Bulgaria, Estonia, Latvia, Lithuania, Luxembourg, Malta, Romania, and Slovakia are not even in the picture.

The Netherlands has two PDOs with its Opperdoezer Ronde potatoes and Brabantse Wal asparagus and the same number of PGIs with Westland grapes and De Meerlander potatoes. Belgium has to make do with one less: Flemish Brabant table grapes may be marketed with a PDO, and Brussels ground chicory and Plate de Florenville potatoes with the PGI label.

TOP FRUIT, CITRUS, AND POTATOES

Top fruit heads the list in the EU with 35 entries in the geographical indications registry (28 apples and seven pears). Surprisingly, neither Belgium nor the Netherlands are represented. Citrus and potatoes have each been registered 23 times. The large potato-producing countries of the Netherlands and Belgium together produce about three times more potatoes than Spain and Italy combined. According to Faostat figures, in 2023, that was 10.5 million tons compared to 3.2 million tons.

Here, too, though, Dutch and Belgian potatoes have fewer geographical indications at about the same ratio as those two Southern European countries (three versus eight). Production volumes are, thus, not always proportionate to the number of geographical indications. That also applies to onions. The Netherlands harvests more onions than Spain and Italy combined (Faostat figures 2023) but does not have a single PDO or PGI onion, while Italy has four and Spain three.

Spain has not escaped this trend either. Consider strawberries, a fruit of which the Spanish volume far exceeds that of any other European country. It seems not a single geographical indication has been applied for or granted from the province of Huelva. Only France (2), Poland (1), and Finland (1) have a representative in the strawberry segment.

And while Spain harvests almost twice as much citrus as Italy, it only boasts two regional labels, while Italy has no less than 13. And just look at the Low Countries, which, entirely against the volume ratios, have obtained two recognitions in the grape segment, compared to only six in total for the big three: France, Spain, and Italy.

Also, unusually, smaller products (chestnuts, nuts, artichokes, and garlic) often outshine much larger ones (tomatoes, grapes, etc.). The chestnut sector has 21 registrations, the tomato sector only six, and geographical indications primarily relate to outdoor cultivation.

Overview of unprocessed fruits and vegetables (including potatoes and nuts, excluding pulses and dried fruits) with PDOs and PGIs in the EU (Bron: eAmbrosia)

	Belgium	Cyprus	Denmark	Germany	Finland	France	Greece	Hungary	Irleand	Italy	Croatia	The Nether-lands	Austria	Poland	Portugal	Slovenia	Spain	Czech Republic	Sweden	Total
Stone fruits				1		5	2	5		12			1	1	4		4			35
Top fruits						3	4	3		8			1	3	7		5	1		35
Citrus						3	3			13	1				1		2			23
Chestnuts						2				14					4		1			21
Nuts						3	3			5					1		4			16
Melons						4				2					1		2			9
Grapes	1					2				3		1					1			8
Exotic fruits															3		3			6
Soft fruits					1	2								1					1	5
Kiwis						2	2			1										5
Figs						1	1			2										4
Prickly pears										2										2
Pomgranates							1										1			2
Persimmons																	1			1
Total Fruit	**1**	**0**	**0**	**1**	**1**	**27**	**16**	**8**	**0**	**62**	**1**	**1**	**2**	**5**	**21**	**0**	**24**	**1**	**1**	**172**
Potatoes	1		1	2	1	4	2			5	1	2			1		3			23
Asparagus				6		2				5		1	1				3			18
Onions				1		3		1		4					1	1	3	1		15
Paprika						1		1		2							8			12
Root vegetables			1	2				4		2	1		1							11
Artichoke						1	1			5							2			9
See						4				2				1	1		1			9
Tomato				1			1			3							1			6
Leafy greens				2		1				2							1			6
Cabbages				2						1	1						1			5
Chicory (including radicchio)	1									4										5
Root vegetables		1								1					2					4
Eggplants							1			1							1			3
Cucumbers				1																1
Basil										1										1
Mushrooms										1										1
Leeks						1														1
Celery										1										1
Truffles								1												1
Fennel										1										1
Total Vegetables	**2**	**1**	**2**	**17**	**1**	**17**	**5**	**7**	**0**	**41**	**3**	**3**	**2**	**1**	**5**	**1**	**24**	**1**	**0**	**133**
TOTAL Potatoes, Vegetables and Fruit	**3**	**1**	**2**	**18**	**2**	**44**	**21**	**15**	**0**	**103**	**4**	**4**	**4**	**6**	**26**	**1**	**48**	**2**	**1**	**305**

Overview of unprocessed fruit and vegetables eligible for PDO and PGI recognition has been applied for in the EU (Source: eAmbrosia)

	Belgium	Cyprus	Denmark	Germany	Finland	France	Greece	Hungary	Irleand	Italy	Croatia	The Nether-lands	Austria	Poland	Portugal	Slovenia	Spain	Czech Republic	Sweden	Total
Top fruit				1										1			1		2	5
Soft fruit									1	1										2
Melons															1					1
Tropical fruits																	1			1
Chutnuts										1										1
Potatoes		1															1			2
Cabbage											1									1
Truffle																	1			1
Total	**0**	**1**	**0**	**1**	**0**	**0**	**0**	**0**	**1**	**2**	**1**	**0**	**0**	**1**	**1**	**0**	**4**	**0**	**2**	**14**

Onedayone

Chinese ginger relies on intensive support for growers, strategic stock in the Netherlands for European sales

Despite the distance, some Chinese fresh produce products effortlessly reach European markets. Ginger, garlic, and pomelos are perhaps the best-known examples. Chinese exporter Onedayone has had a sales office and storage space in the Netherlands for several years. That is to offer customers a smooth service, be easily accessible, and stay up to date with market dynamics in Europe. From Shanghai, Maggie Peng provides insight into how a Chinese trading company tackles far-away exports.

Onedayone turned 20 last year. In 2004, it began by exporting Fuji apples to a German client. These days, top fruit makes up only a fraction of the company's export pie. That product, though, opened the doors to the European market for a typical Chinese product that is increasingly being consumed in the West: ginger. Onedayone's product range on offer to Europe has expanded to include pomelos, mushrooms, garlic, and bok choy.

DUBAI AND ROTTERDAM

Yet Europe was not the first overseas region in which Onedayone established an office to be closer to its buyers. "It was in Dubai," begins Maggie. "We've been arranging deliveries to wholesalers and retailers in the Middle East from our storage facility and packing facility there since 2009. Rotterdam is the gateway to the European hinterland for overseas products, which, with 60%, is our largest export market. In 2017, we, thus, decided to open a packing plant near that port. We're building up a strategic stock there to provide greater supply security for our customers, who consist of importers and wholesalers. The sea voyage, after all, takes about 45 days, and unforeseen circumstances sometimes bring that to two months."

SMALL-SCALE GROWERS

Onedayone's tale began in Yantai, in the Shandong province, China's top ginger growing area. They have a branch in Zhangzhou, in the Fujian province, too, where pomelo cultivation is strong. Maggie explains that, in China, horticulture still relies largely on small-scale growers. "Onedayone isn't a grower, but it manages the cultivation by working closely with mostly older, rural small-scale growers. We teach those growers the best cultivation techniques and the standards they must meet regarding fertilizers and crop protection products. That's crucial for those wanting to enter the European market," she says.

In China, all land is state-owned. In other words, growers cannot sell the land they cultivate, which explains why there is no concentration of growing companies like in Europe and other parts of the world. "Though we cannot grow everything, we do maintain full control over the chain, from seed to delivery to international clients. Nothing is left to chance. We know how important respecting MRLs are to selling to Europe, and we were one of

Onedayone was one of the first exporters to introduce residue-free ginger cultivation in China

the first Chinese exporters to introduce residue-free ginger cultivation in China. Growers get higher prices for that, too. It did, however, take a while to get everyone on board with that idea."

CONSUMER-DRIVEN

Ginger has always been included in most Chinese cuisine. "Ginger is now gaining popularity in the West, particularly because of its health benefits. Our rising exports are, therefore, completely consumer-driven, which strengthens our goal to grow by 15% annually in the European market. There, around 40% of ginger comes from China, 25% from Peru, and 20% from Brazil. And of every five pieces of Chinese ginger in Europe, Onedayone markets one," Maggie explains.

She says Chinese ginger is a brand of its own. "People know China is the birthplace of this special rhizome. What's more, this lovely product is great value for money. Our supply for Europe goes solely to the fresh market. Our intensive grower support means the quality is too high to divert the ginger to the processing industry."

PRICE FLUCTUATIONS

As a "born export company," Onedayone focuses exclusively on the Middle East and Europe, even when the local market occasionally outperforms those overseas destinations. "Supply and demand movements sometimes cause price fluctuations. That's because price situations often guide growers in their crop planning. If the grower price for a crop is high, it's not uncommon for them to increase acreage the following year. That then usually results in a higher market supply and lower prices. As an export company, however, Onedayone has its sights set on the long term, and we don't let short-lived local market opportunities distract us," says Peng.

KNOWLEDGE OF THE WESTERN CULTURE

But export market fluctuations create challenges too, especially logistically, she adds. "Sea freight costs and durations are volatile. Nonetheless, even in the most unpredictable months during the pandemic, we managed to fulfill every order from our loyal buyers. That's thanks to our branch in the Netherlands, where strategic stock and an accessible contact point kept trade flowing smoothly. It still does."

"Shorten the distance – and, I don't just mean the physical distance – to the customer, and you immediately remove many obstacles. For a Chinese company to be successful in Europe, it must be willing to understand Western culture and communicate with clients in the right way. That might still hinder many Asian exporters, but we're certainly doing our utmost to circumvent that," Maggie concludes.

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Jonathan Vandesande, FMB

Supplying fresh produce to German retailers and wholesalers with passion and market know-how

For as long as anyone remembers, Belgian fresh produce has been shipped from Sint-Katelijne-Waver to Germany. Frans Michiels Belgium (FMB) delivers tomatoes, lettuce, fruit, and open-field vegetables from there to cities like Berlin and Munich every day. FMB, which turned 100 in February, can rightly be called an established name in fruit and vegetable logistics. Jonathan Vandesande, its commercial manager, gives an overview of recent developments in the German destination market and the Flemish supplier landscape.

Not long before the pandemic, this Belgian company joined the Calsa group as part of a broader integration process for independent exporters. "Integration is a logical development. It ensures greater efficiency," says Jonathan, who joined the FMB as sales manager during that period. "Sales channels-wise, FMB - like every other fresh produce exporter - used to focus on Germany's wholesale markets. These days, we have a healthy balance between wholesalers – some of loyal, decades-old customers – and retailers. We don't sell to the really big retailers' distribution centers. We do, though, supply their suppliers, especially to the medium-sized chains. As a pure trading company, we prefer that somewhat more limited volume and the negotiation dynamics."

THE ADVANTAGES OF A TRADING COMPANY

According to Jonathan, a trading company like FMB benefits retail clients because it can feel out the market and, so, offer fair prices and terms. "In that sense, we're a kind of commercial lubricant between the suppliers in Belgium and the supermarkets in Germany," he says. FMB means something for wholesalers and early market buyers in that it arranges goods collection and order picking.

"We get fruit and vegetables from a wide range of suppliers: the three large cooperatives, straight from growers, and supplemental volumes from importers and fellow traders. That mix of origins is necessary. Otherwise, you risk being unable to fill your often very diverse orders. A flexible organization is a must if you have customers who sometimes order two pallets of 30 different items."

"Order picking, in addition to broad sourcing, is one of FMB's strengths. With such a wide assortment of products, automation doesn't get you very far. Order picking is, therefore, done manually in the morning, which is laborious. Then, in the afternoon, everything has to be loaded quickly so the various German buyers, some as far as 800 km away, receive their orders the next day, on time and in good condition," says Jonathan.

BLOOD RED TOMATOES IN EAST GERMANY

As a specialist in Germany, he is well-placed to shed some light on some regional preferences in that vast market. "Most unusually, unlike the rest of the country, in the east, the former GDR, people want deep red tomatoes. That's caused us trouble more than once. They reject shipments if the tomatoes aren't quite colored yet, even if they're about to ripen. Explaining that doesn't help. There are a few instances like that, although, generally, the Germans have some kind of universal sense of quality. Freshness is the most important thing," explains Jonathan.

ORIGIN AS A MARK OF QUALITY

Belgian and Dutch fresh produce are a fixture on the German market. Something that, says Jonathan, will not change any time soon, despite the expansion of local cultivation initiatives and the advance of other origins, including neighboring Poland. "Greenhouses are being built in Germany, but often with varying success. From my contact with German growers' cooperatives, I sense a trend towards hydroponic lettuce cultivation. That works well with tri-color or

Frans Michiels Belgium delivers tomatoes, lettuce, fruit, and outdoor vegetables daily to Berlin and Munich

multicolor lettuce, but for head lettuce, there still seems sometimes to be a lack of knowledge regarding growing techniques. Then growers call us, asking if they can quickly buy some product. After all, they must fill their programs."

Also, for some products, Belgium and the Netherlands, as origins, are marks of quality in themselves. "That's particularly true for tomatoes, lettuce, and some open-field vegetables. German customers will pay slightly more for consistent quality products. Flandria as a label helps enormously with that, as do independent growers and the three large cooperatives' brands. However, Belgium and the Netherlands existing as suppliers have a deeper reason. Germany is far from self-sufficient. The greenhouse projects are undoubtedly expanding, but perhaps, economically, that country considers importing some products as more efficient. It can then use its available labor force for other things," the commercial manager points out.

He is not losing any sleep over the increasing competition from Eastern Europe, where greenhouse cultivation is rising in countries like Poland. "At the peak of summer, when there's plenty of supply everywhere, some produce, especially bell peppers, come from Poland to Germany. However, prices must differ significantly before our customers choose Polish products."

"Quality and a good name are still decisive. It's only when we have shortages and prices rise sharply that German importers turn to Poland. That country has successfully asserted itself in the apple market, though. There, Belgian and Dutch growers have had to reorient themselves under pressure from their

"A flexible organization is a must when you have customers who sometimes order 30 items on two pallets."

Polish colleagues. And after a dip, they've noticeably regained some past successes over the past two or three years," Jonathan continues.

TOO FEW DRIVERS

What did, until recently, keep him awake was the staff shortage. "Until 18 months ago, the situation was worrying. It was hard even to find office staff. As soon as young people start families, they're no longer willing to get up early, regularly work weekends, and be available at night if drivers have problems on the road. The worst thing, though, is finding competent drivers for international transportation. You leave around noon and drive for 12 hours straight."

"Then you make two or three early morning stops, in the dark, at markets where you must unload the cargo yourself with a hand pallet jack. Only then can you find somewhere to sleep in the area, around Munich, Nuremberg, or Berlin. Many of our drivers are approaching retirement age," Jonathan admits. "Yet we still manage to offer this logistical service that sets us apart. And since early 2024, I've seen a bit of easing in the labor market. Perhaps because the economy isn't doing so well in certain other sectors, such as construction."

"With clients ordering 30 items over two pallets, your organization must be flexible."

PASSIONATE

General costs are another challenge. "Transportation is becoming incredibly expensive, especially in Germany. It seems they're constantly inventing new taxes to deal with road freight traffic while expecting fresh produce to reach every corner of the country. But I sometimes say that if our job was very easy, anyone could do it. We still make money, too. And above all, we love what we do. Fruit and vegetables are a special business, you do it with passion. Despite all the challenges, you've come to the wrong place if you want a gloomy outlook. The future looks really positive for exports to Germany," Jonathan concludes.

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Hans Huistra, HZPC

The Dutch seed potato sector is prospering

By mid-March, Hans Huistra, CEO of the Royal HZPC Group, had done a good deal of driving on Dutch highways. He rushed from meeting to meeting, sharing the good news that last season's average prices will be historically high with affiliated seed potato growers. Between two of these information sessions, the CEO of this potato breeder and seed potato supplier with global operations took a moment to talk with Primeur. He speaks with pride of the company's local roots and international reach, Dutch seed potato growers' enormous skill and drive, and the Royal HZPC Group's R&D center's progressive nature.

Hello Hans. Thank you for making time for Primeur.
You're welcome. Yes, I'm quite busy. Last week, I was in Groningen, Friesland, and Noordoostpolder; yesterday, I was in Zeeland. And today, I'm addressing growers in North Holland and Texel. There's a good turnout every time, and it's nice to see several generations there, not just the older growers.

Seed potato growers seem to have had another good season regarding received prices.

Undoubtedly. We announced that the estimated average price, across all varieties and sizes, will be €61.50 per 100 kilos of seed potatoes. That's even better than last year when prices were also historically high. Last year, that figure started with a five for the first time; this year, it's with a six. It remains a crop that demands much know-how and skill, and our growers always invest plenty of energy in it. That should be rewarded with good prices.

(From left to right) Georgios Ioulianos, Mayor of Xylofagou, the potato village in Cyprus. Andreas Gregoriou, Secretary of the Cypriot Ministry of Agriculture. Maria Panayiotou, Minister of Agriculture of Cyprus. Their Majesties King William Alexander and Queen Maxima. Eppo Bruins, Dutch Minister of Education. Socratis Pilavakis, Director of A.S. Pilavakis Ltd./Sun Potatoes, and Andreas Tofallis, potato grower.

Hans Huistra during Potato Days 2024. Photo Antsje Cnossen

You mentioned the younger generation. Do you see a willingness from them to invest in this crop?

The new generation certainly isn't blind to the many challenges like the climate, high property prices, disease pressure, and complicated regulations. Not all growers do equally well every year, that much is clear. In Zeeland, in particular, last spring's rain negatively affected yields. But all the young growers I've recently spoken to see the opportunities and possibilities of this crop. The good average sales price proves that.

Has the seed potato acreage in the Netherlands not been under slight pressure in recent years?

Indeed, it has. But all destinations have been finalized, and planting has begun, so we should see some growth in the Netherlands this year. This upward movement is also prevalent within our group.

Do you fear increased competition if your seed potato prices rise?

It's a balancing act. Seed potatoes are a significant cost factor for ware potato growers. High quality, though, always pays off. Dutch seed potatoes are still highly sought after worldwide. And the market ultimately determines the prices. Our business is well spread across the four seed potato categories we're active in: traditional exports, ware potatoes for European retail, fries, and chips. We don't do starch potatoes. Surrounding markets are, of course, a consideration, but the market as a whole is expanding, which makes us confident about the future.

But, is it not becoming too expensive for countries in, say, North and East Africa?

I visited our team in Tanzania two weeks ago. Unlike Kenya, which doesn't allow seed potato imports, the Tanzanian market isn't segregated. Our varieties are popular in Tanzania. Specialized growers propagate the Dutch basic materials before the seed potatoes eventually end up with ware potato growers. This intermediate step means local growers can pay the seed potato prices, even though

His Majesty King Willem Alexander, Minister of Agriculture of Cyprus, Maria Panyiotou, Socratis Pilavakis, Director/Owner of A.S., Pilavakis Ltd./Sun Potatoes, Her Majesty Queen Maxima
Photo: RVD

they're still slightly pricier than local seed potatoes. However, our team is conducting extensive training programs in Swahili to show that our varieties' two to three-times higher yields more than compensate for that. And that message is catching on with small-scale growers. As I said, quality always pays for itself.

In a large market like Egypt, you do see France and Scotland supplying seed potatoes. Yet the Netherlands remains a crucial player. That has much to do with research, which, in our case, started early. Under my predecessor Gerard Backx's impetus, HZPC was the first seed potato company to invest substantially in R&D to develop new varieties that have better yields, quality, and flavor. That was a long time ago, but we're now reaping the benefits; breeding takes many years. Many other players gambled more on open-pollinated varieties. Regardless, there's competition, but that's how it should be because the market's still growing.

What is your R&D budget?
We currently invest €10+ million annually in research and development. We do most of that in the Netherlands, in our modern research center, where we currently have about 750,000 seedlings. We bring a few varieties onto the market each year. As a breeder/trading company, we focus on the quality of new varieties, not their quantity. That's why we also control the sales and logistics organization. Some customers have been buying from us for several generations.

How much acreage do you need to bring a new variety to market?
That's not an easy question to answer. We, naturally, hope that a new seed potato variety that exceeds the limit of a thousand hectares is developed every so often. But those are few and far between. The Colomba variety, for example, has become a strong market leader in the European retail sector. It's also growing strongly in the US, China, India, and West Africa. China is the world's largest potato market, and HZPC has been active there for a long time. India is number two. We've had a joint venture there for over ten years. America's potato consumption isn't really increasing, but that country is shifting towards new varieties.

Besides the bestsellers - Colomba, Innovator, and Spunta - there are several varieties with several hundred hectares. Cardyma, Invictus, Quintera, and Travolta are gaining ground in the French fry segment. In the wake of the Innovator, I call them our four musketeers. We've optimized around 150 potato varieties in our assortment for local growing conditions. We also export seed potatoes to more than 90 countries.

In addition to French fry and ware potatoes, you also listed chips and traditional exports as categories. Which varieties fare well there?

In the chips category, Norman and Taurus stand out, and in traditional exports, the free variety, Spunta, is still strong in North Africa and the Middle East. As a somewhat older breed, Fabula keeps doing well in traditional exports, with newcomers Rashida and Panamera winning an ever-larger market share.

Which category is the largest, and which is expanding the fastest? I see, for example, that French fry factories are springing up all over India and China.

Europe doesn't send any seed potatoes to China or India. Like Kenya, we can only bring our genetics, and the seed potatoes are then propagated locally. However, the French fry market is snowballing, indirectly creating competition for European French fry factories. Europe's seed potato acreage intended for ware potatoes is still the largest.

The French fries sector, on the other hand, grew the fastest over the past decade. European French fry manufacturers are starting to expand internationally, too. But average seed potato prices being so good this year largely comes down to traditional exports and ware potatoes for European retailers. French fry sector prices are usually under more pressure because that sector has huge parties active as buyers.

China, India, and the US don't take your seed potatoes. Are those potential seed instead of seedling markets?
Hybrid breeding does, indeed, offer the option of growing potatoes from seed, as does faster genetic progression. There are opportunities for this in specific markets like parts of Africa and Asia. It is hard to reach those areas with seed potatoes, and logistics are often a hindrance.

Could you gain a foothold in the American potato market, where the Russet Burbank variety still dominates?
The numbers show that yellow potatoes are the fastest-growing segment in the United States. Russet Burbank, a brown-skinned, white-fleshed variety, has been around for more than a century. It's holding up exceptionally well, but the yellow potato segment is rapidly expanding. And our Colomba is the fastest growing variety in that category.

American companies like McCain's and Heinz have breeding divisions. Could they begin targeting the European market with their seed potatoes?
They buy from us too. Potato breeding has relatively modest profit margins compared to French fry manufacturers. They can, therefore, much better invest their money in new factories and new concepts than in new variety development. You need specialists for that. It takes many years to see a return on your investment in variety innovation. Those companies are good clients, and we're delighted with the constructive cooperation we maintain with them.

Do you think concentration will increase any time soon, and could small-scale seed potato growers struggle to survive?

Greenhouses of HZPC Research in Metslawier. Photo: Manon Moonen

The potato sector is quite conservative. Major investments accelerate genetic progress, making it harder for small companies without strong varieties to keep up. Yet, some commercial companies in the Netherlands focus solely on free varieties and earn a good living. Regardless, we believe investing in better varieties is in our shareholders - most of whom are Dutch growers - and consumers' best interest.

Are you developing a special air fryer potato? Or is that segment too small?
The home fries segment is quite big. It's somewhat at the junction between the retail and the French fries industry. Several of our varieties are ideal for making home fries, including in the air fryer. Challenger is a good example. As part of an in-depth research investment, we pay plenty of attention to homemade fries' proper structure and flavor.

What about climate change? How much does that factor into your breeding efforts?
It's a crucial aspect. We have 50 trial fields around the world. We specifically test how varieties withstand drought at the one in Cyprus, which the royal family recently visited. But it's also about cultivation techniques. Here, drip irrigation is vital, and we strongly encourage it. We provide seed potato growers in those countries with basic material that we've tested for drought resistance. They and their customers - ware potato growers - can, thus, achieve good results.

Climate change and the disease and pest pressure that it brings are considerable challenges. But then you see that Dutch seed potatoes aren't just a physical product; that sector also offers breeder and grower knowledge and skills. All the growers I've recently spoken to cultivate seed potatoes as their primary activity. In that sense, the Dutch seed potato sector isn't so much a competitor for Africa, the Middle East, and other parts of the world but rather the basis for robust, healthy potato cultivation in those countries. The Dutch seed potato sector has many good years ahead of it. (PB/PDC)

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This sustainable supermarket of the f

Last month, a group of trade enthusiasts visited Germany's prettiest supermarket in Nauen, a suburb of Berlin. This must-see is an entirely new supermarket experience. It is 2,500 m2 of sustainability and innovation and the concept is built around the Sustainable Supermarket of the Future theme.

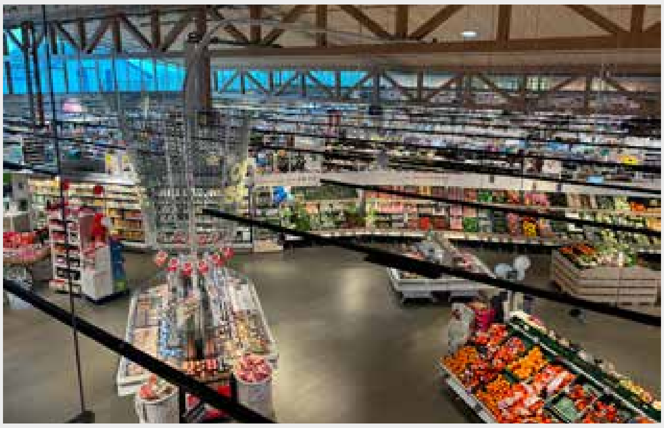
Dutch architectural firm JDV International was tasked with designing a sustainable wooden building with an interior that supports its shopping function. For this project, sustainability means ‚less, but better' and it emphasizes the materials' natural beauty with no unnecessary decor. The focus was on four essential factors: transportation, ecolo-

future is also germany's prettiest

gical footprint, circularity, and lifespan. The project also serves as an example for Dutch supermarket formulas.

In keeping with these sustainable goals, the store installed special refrigerators that use a closed water circuit for cooling. The freezers and coolers are designed to be removable so that Edeka can move them when necessary. Edeka can, thus, change the layout without compromising functionality.

This is, undoubtedly, the most beautiful supermarket in Germany. Using plenty of wood gives it a warm appearance both inside and out. The formula's ample space for entrepreneurship is distinctive. The store offers a wide range of local products, sharing each one's story. It is spacious with lots of parking; that is much needed, given this supermarket's extensive catchment area. This project is truly state-of-the-art and well worth a visit. The photos speak for themselves.



Teboza celebrates 80th anniversary:

“Green asparagus sales could overtake white variety within 5 years”

Teboza is turning 80. This company grows asparagus in the Netherlands, and for a good decade now in Spain. What started as a mixed crop farm had by the 1980s gradually evolved into solely cultivating strawberries and asparagus. In 2001, Will Teeuwen, this family business’ third generation, decided to ditch the summer strawberries, too, and go all out on the ‚white gold’. “Few companies focus entirely on asparagus. We don’t necessarily have to be the biggest, but we do want to be the best. Hence the exclusivity,” begins Will.

Official opening of Teboza's new office on June 9, 2024.

Hello Will. Congratulations on your asparagus company's 80th anniversary. When and how did the business begin?

My grandmother Marie Van Lier grew up here in [the Dutch village of] Helden, where our company is still located. She comes from a family of farmers. Her father died young, and there was no one to take over the farm, so when my grandfather Lodewijk Teeuwen married my grandmother, he moved into 15 Zandberg to manage the farm. Asparagus was already an important crop at the time – it was the first product in the spring that earned money – but it wasn't the only activity. They raised cattle, had fruit trees, and harvested open-field vegetables every year. After WWII, it was a mixed farm that provided just about all food products. Asparagus is labor-intensive so it wasn't the favorite crop. That labor issue is still challenging for the sector to this day.

Did you work at the company as a boy?

My father took over the business early, in 1969. I was born that same year and remember helping out at the age of 10 already. In the spring, that meant seven days a week. In the morning, we'd harvest the asparagus, eat a quick sandwich in the afternoon, sort the asparagus, and then go to auction. Back then, in the 80s, the company was, of course, still small-scale compared to today's standards. Anyone with five hectares was considered full-time and could make a good living.

Does a modern asparagus farm have to be five times that size to be profitable?

Well, the dynamics are entirely different. Until around 2015, virtually every asparagus grower made money. That's no longer the case. Now, there's much more organization involved, and you must invest significantly in efficiency to maintain margins. Asparagus isn't the easiest crop to grow. Specialization is almost a requirement, but it also pays off. The recent decline in acreage is mainly due to not everyone automatically being profitable with this crop. The time has passed when asparagus growers could survive by roping in the whole family to help in the field and during harvesting. Some find that a shame because, in that sense, this product's charm seems to have faded somewhat.

When did the acreage start shrinking?

In the past, horticulture hasn't always produced for the market; perhaps it still doesn't. Many growers only considered how much of a particular product they could plant and harvest themselves. The asparagus supply, thus, outgrew market demand about ten years ago. Prices fell, and acreage shrank to the point that now, demand outweighs supply. Unlike the acreage, consumption has risen sharply in recent years, partly because supermarkets have had major promotions every season.

But because it costs so much to resume cultivation - to make an asparagus farm profitable, you need a specific scale and expensive machinery right away - I doubt the acreage will reach its previous level anytime soon. Also, succession and the climate are undeniable problems, as are other factors that put pressure on yields, such as ever-increasing environmental standards and certification requirements.

An asparagus plant only comes into full production by year three, not so?
Yes. Plant a seedling now, and you'll have a small harvest next year, let's say, a quarter of the production capacity. You'll be at 70% the following year, and only in the third year will you have a full harvest. It takes years before you start earning anything.

I assume you, then, replace a given percentage of your acreage with new plants annually?
A field lasts about a decade, so to keep up, we replace 15% of the acreage every year. Teboza is also still in its growth phase, so we plant more than just replacement asparagus plants. The current focus is on an early crop. The sooner customers have a quality product, the smoother sales will be when the large volumes become available. Plus, it's easier to work with a steady supply, although, as growers, we can never fully control that. The weather remains the deciding factor. Sometimes it's too cold; sometimes too wet.

Spain, for example, where asparagus is also grown, has had plenty of rain this year, so far. Does Teboza farm there?
We manage two locations in Andalusia where we cultivate only outdoor green asparagus. Normally, harvesting starts in February, but this year, that's been pushed back slightly due to the persistent rain. From 2026, we plan to harvest in Spain from February to October. That's eight months. We bridge the other four months, and when the Spanish product

cannot meet all the demand with overseas imports, mainly from Mexico and Peru.

Green asparagus is rapidly gaining popularity and is a product with which we keep expanding. I suspect within our company, its sales will overtake that of white asparagus within five years. One of the future challenges will be to meet the growing demand for particularly green asparagus, because Europe's acreage isn't likely to increase. Spain has had sufficient water this year, but who knows if there will be enough precipitation in the coming years to fill their water reservoirs.

Why do you think green asparagus sales could outgrow white?
People eat green asparagus year-round, and it's versatile. You increasingly find it in, say, salads. Even though you can import white asparagus from South America or South Africa outside of the Dutch season, consumers embrace that as a spring product. That's nice; I think we should cherish that seasonality. We have white asparagus available for four to five months, from late January from the greenhouse until the end of June, with the last open field product.

I've read that labor is an issue in Spain, too. Does that affect you?
In Spain, where they employ not only locals but also labor migrants, wages are rising. That's quite problematic. Also, finding good soil there is even harder than in the Netherlands. Put it this way: in our line of work, you sometimes find yourself at a loss. Challenges, further compounded this year by the heavy rains and delayed harvest, abound. We're nevertheless growing fast in Spain and firmly believe those investments will pay off soon.

Local growers visiting our plots prove things are moving in the right direction. They see how we work and ask if they can grow for us. We have the necessary people on hand who can help them get started, so our answer is often affirmative. Still, we ensure we do three-quarters of the cultivation ourselves. Having control over the process is still the best guarantee of continuity and quality.

Is your Dutch cultivation divided in that way too?
We have a loyal group of growers in this region of the Netherlands, usually from mixed farms, who supply us. That's been the case for almost 20 years, and it works great. But indeed, here, too, we do most of the cultivation ourselves.

You mentioned the labor issue. Do you use a selective harvester?
We do. Though I must say, it still requires some fine-tuning. When we'll begin using it depends on this year's results. But it must be soon because robotization is a must these days. People are increasingly suspicious of migrant workers, and the wage pressure is high. The existing harvesters, nonetheless, still need plenty of hands.

Are you looking to gain efficiency elsewhere?
We have to do something every year because costs keep rising. We plan on spending a pretty penny on an even more advanced optical sorting machine that will increase capacity and quality. Yet many packaging tasks, like neatly placing the asparagus straight on the conveyor belt, are done manually. Automation doesn't yet offer a solution for that.

Do you package your asparagus in paper or plastic?
We primarily supply Dutch and Belgian retailers, and the Dutch prefer flowpacks, while the Belgians want their asparagus in a small tray. Asparagus has a high moisture content, so uncoated cardboard containers aren't an option. I understand the discussion about packaging material usage, but that packaging is what reduces waste. Offer asparagus loose in stores and you end up throwing a third away. That has an environmental cost because you must then produce a third more to meet the demand. I get the feeling politicians are making decisions over our heads on the whole packaging issue without sufficiently involving the sector.

What are Teboza's biggest challenges at present?
We've already touched on those: rising costs, climate change, and policy. Number one is the cost increase, particularly wages, and input prices. Those materials must be manufactured, and every sector struggles with rising labor costs. But it isn't easy to pass on those increases. Number two is the climate, something I'd not have mentioned four years ago. I'm talking about the extreme weather that now hits every country. It forces us to spread our risks by focusing on multiple growing areas and different cultivation techniques.

And number three is the lack of coherence and direction in policy. The government seems more concerned with trivial matters than what's genuinely important for the horticultural sector. Hopefully, there will be a turnaround in that because, for business people, nothing's as disruptive as fickle policy.

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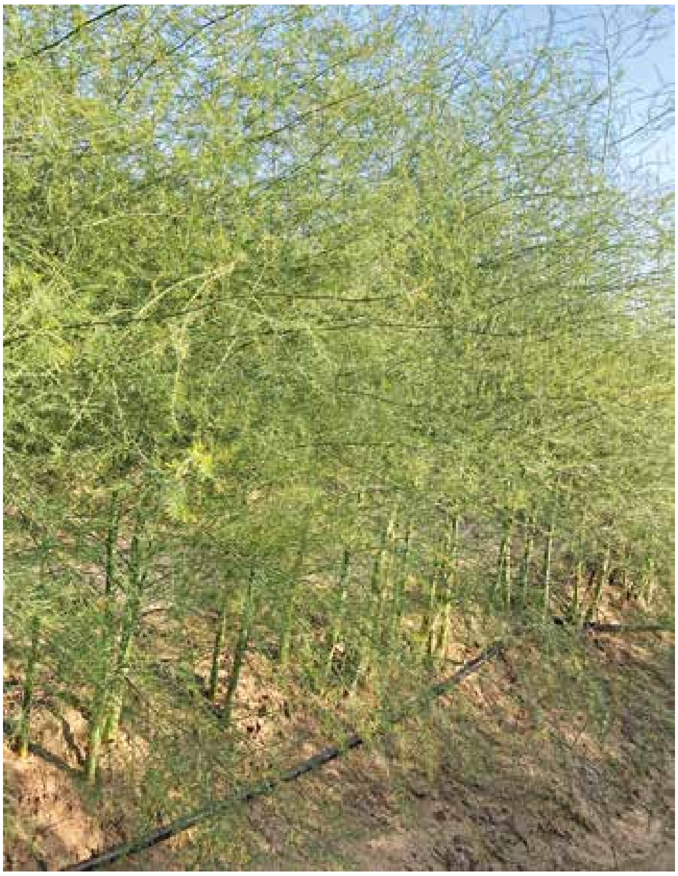

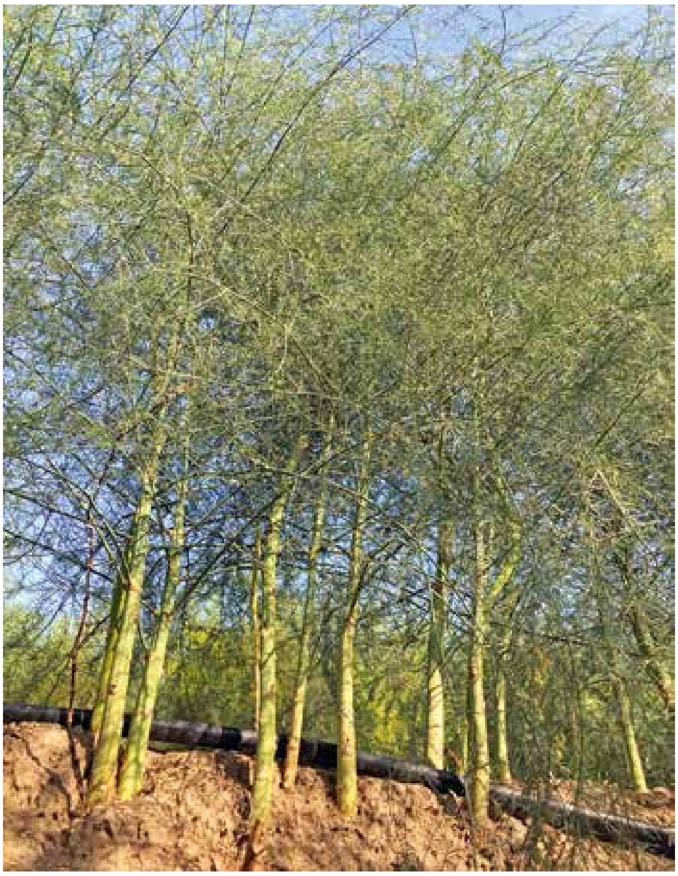

This year, the first of these asparagus will be planted in Austria and Switzerland, too

Limgroup's Stefan Pohl about the asparagus sector developments:

"Late segment asparagus varieties are on the rise"

Rising costs and tough sales: many know the European asparagus sector has had a difficult few years. Things, however, seem to be looking up for this queen among vegetables. Sales still peak in the first half of the season, but the period between Pentecost and the traditional end of the season on June 24 appears to be doing better. Late-segment varieties, though, are few and far between. Limgroup, a breeding company, wants to change that with its new Mosalim variety, reports Product Manager Stefan Pohl.

It took about 12 years from this late segment variety's initial crossbreeding to its actual market introduction. The main goal was to develop a modern alternative to the long-recognized Backlim variety for the last phase of the asparagus season. "Mosalim retains its great tip closure even at higher temperatures," begins Stefan. "It's also excellently suited for mechanized harvesting and a longer harvesting program."

"From the grower's perspective, the variety has overall good foliage health and yields throughout harvesting. These parameters all benefit the variety. Mosalim should, thus, make a name for itself in various cultivation areas in the coming years," the product manager says. "It should also gain a good market position. Backlim can, however, remain the standard variety in asparagus cultivation."

Mosalim is grown in almost all the major asparagus-growing regions in Germany and some in the Netherlands. Last year saw the first plantings in that country, but it has been planted on a particularly large scale this year. "We realized there are many medium-late asparagus varieties, but only a few very late ones. That means there's demand for good, high-yield late varieties everywhere, not just in Germany and the Netherlands," says Stefan.

The early segment is not necessarily more lucrative, sales-wise either. "The season has been increasingly brought forward over the years, pushing up early asparagus cultivation costs. That's mainly due

Stefan Pohl at expoSE 2023, where he officially introduced the new late variety, Mosalim

to high labor and plastic costs. Because of rising minimum wages, this problem will only grow. And on the sales side, there's a certain threshold regarding prices we cannot exceed. That makes it harder and harder for many growers to make any decent money for early crops."

"But, that increases the interest in the late segment as many growers recognize that achieving good yields in the season's last three to four weeks is worthwhile. Demand is admittedly relatively low during that time compared to the first part of the season, but so is supply. Available products are, thus, generally easier to sell. We want to offer growers a good variety with Mosalim, so they have high-quality products available until the very last day of the season," Stefan continues.

ASPARAGUS SECTOR CONFIDENT ABOUT THE FUTURE

According to Pohl, the mood in the sector is currently quite positive. "In many areas, older fields are being rejuvenated to meet current standards. That's true for the plant market, too, which is completely sold out. That's, no doubt, a good sign." However, the latest figures show that the number of asparagus farms is decreasing in certain regions. "We think the decisive factor is the sales structure. I'm sure those with a good, stable sales structure will keep prospering in the future," he says.

"Others who don't have that will have to give up, sooner or later. The rising minimum wage remains a constant challenge, though. Labor costs make up around 60% of asparagus cultivation costs. Still, I doubt we can say the entire sector is suffering. Innovative companies look for solutions, while others see problems. If we consider the acreage throughout Germany, it's still one of the strongest growing countries in Europe, even the world. In that respect, I don't believe the current change is alarming for the sector at this point," Stefan reckons.

GREEN ASPARAGUS KEEPS GAINING GROUND

Alongside the still dominant white asparagus, its green cousin is undeniably gaining ground. "It currently has a market share of roughly 10-12%, and its upward trend continues. On the one hand, some companies specialize in green asparagus; on the other, some are still skeptical about this crop. Basically, however, green asparagus has become a staple for most cultivation companies."

The Limgroup has been offering the Xenolim variety specifically for the green asparagus sector for several years now. "This variety's main advantage is that it's an anthocyanin-free plant, which means it doesn't discolor. Growers can use that to stand out from imported trade, which gives them a clear competitive advantage regarding sales. Xenolim is a medium-late variety. Looking ahead, we aim to breed a late green asparagus to offer the entire spectrum," Stefan concludes.

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Walter Gubbels:

"Gambling on greenhouse asparagus paid off this year"

Walter Gubbels. Image: Van Gelder Groenten en Fruit

In early April, Dutch asparagus grower Walter Gubbels reflected on a fantastic start to the greenhouse asparagus season. "We took a big gamble by betting on the greenhouse, but we started early in our two-hectare greenhouse and truly pushed hard. This year it paid off; prices are excellent," he says.

That season is over, and the mini tunnels are in full swing. Walter does not fear a price dip. "We thought last year's prices were good, but it seems they can get even better. And with the holidays on the horizon, prices certainly won't drop." That prompted him only to open his store on the weekend of April 5. "It's usually open sooner, but the €20+ prices meant it wasn't worth selling asparagus in the store. We sold everything through The Greenery," says Walter.

He doubts an ample supply will be available anytime soon. "Last year, entire fields were flooded. That led to a poor growing season, with even the great plots producing only moderate yields. Total production will, therefore, be much lower. The Prius variety, in particular, proved completely unable to withstand the flooding. The difference with this year is unprecedented. Last year, the rain did plenty of damage; this year is the exact opposite. Everyone's irrigating."

NO STAFF SHORTAGE

Gubbels has no issue with staff shortages either. "The minimum wage has risen, which attracts people. Poles want to come and harvest asparagus. Lately, there's been considerable competition from the German car industry, which offered longer-term employment. But Germany's economy is stagnating terribly, so all those workers are returning," he says.

"Demand is also looking good. Europe's total asparagus is shrinking while demand is only rising. Asparagus's strength is still that it's a seasonal product that retailers and the hospitality industry like working with. If I were a young entrepreneur, I'd jump in with both feet. But I realize that's easier said than done. It's costly. Good soil alone is tremendously expensive and difficult to come by."

Walter focuses mainly on white asparagus. "We still grow a minimal amount of purple, but no longer any green. We had high hopes for that, but we simply cannot compete with cheap imported green asparagus. Selling white asparagus is more profitable. It sold for around €12 on April 7. That's already down from last week," he concludes. (IH)

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Hans Kalter, Christiaens Agro Systems:

“Our 25th asparagus harvester is about to be put to work, also in the Netherlands”

Though non-selective asparagus harvesters are commonplace, the market is also working on selective asparagus harvesting machines. So says Hans Kalter, Sales Manager at Christiaens Agro Systems, a Dutch company that designs and manufactures machines that process elongated vegetables, including asparagus. “We’ve already introduced 25 of our non-selective harvesters,” he begins.

The difference between selective and non-selective systems lies in their harvesting technique. Selective harvesting robot detects the individual asparagus to be harvested, picks it, and places it in containers. Non-selective machines cut the whole bed at once. “The machine harvests the entire bed, soil and all and sieves the asparagus out. The bed is rebuilt under the harvester.”

BETTER QUALITY

“When you harvest by hand, you cut the spears, one by one, pull them out, and fill in the hole. But that spot is always less solid than the rest of the bed. When a new asparagus spear grows, it takes the path of least resistance and, so, grows towards the looser part of the bed. That results in more crooked spears as the harvest season progresses. They sell those as Class II,” says Hans.

“With non-selective harvesting, the beds are rebuilt after the spears are cut and the soil removed. You, thus, have straighter asparagus for the next harvest.” Because the asparagus bed is also cleaned, Hans sees that the asparagus have fewer problems with rust.

CAPACITY

The harvester’s capacity is also a factor. “Most growers want to harvest asparagus no more than once every two days, by hand and with the selective harvester. Temperature plays a role here; when it’s hot, you must harvest the spears more quickly and frequently. You can moderate the temperature somewhat by using the plastic’s white side instead of the black side,” Hans explains.

“But when the temperature hits 30+ °C, you’ll have to harvest the asparagus daily to maintain quality. With non-selective harvesting, you harvest a few days’ worth of asparagus. That means this machine has a high hectare capacity. You can harvest the same plot of land six times on average. You can also use it to flatten a peak in warmer weather. Or to clean up the bed when the asparagus quality declines.”

COMBINATION

Hans, therefore, sees non-selective harvesters offering opportunities for several growers. “If it gets really hot and manual or the selective harvesting machine’s capacity decreases, the non-selective harvester can provide some relief. After using it, you can rest a plot for up to ten days, depending on the temperatures, and growers can harvest other plots at the right time,” he says.

PRE-SORTING

However, the non-selective machine cuts all the asparagus, which Kalter recognizes as either an advantage or disadvantage depending on the grower's sales method. "Prices usually drop slightly in the second half of the asparagus season. You pick all the asparagus with selective or manual harvesting, including Class II. And that all goes to market, with the result that the Class II has to be supplemented."

"With the non-selective harvester, the asparagus ends up on a conveyor belt where, at most, four people pre-sort it. Then you can already sort certain qualities, in the field, so it won't cost you anything else for an unprofitable product," Hans points out. He, though, also sees growers who could make much more money from selling their Class II asparagus at farm stalls remove all those from the belt.

Regardless, according to Hans, the non-selective harvester saves labor. "You need 1.5 people per hectare, per day to hand pick white asparagus. To harvest three hectares per day every seven days, you'd need about 30 people for a total of 21 hectares. Using the non-selective harvester, you'd need only four. And using the lights, growers can use it for several hours longer."

Hans has noticed that it is not only large asparagus growers who use these non-selective harvesting machines. "We sell them to companies with, say, eight hectares of asparagus. Those growers can then harvest with no personnel and also avoid the hassle of housing and administration. They work with their own families, for example, using the machine to harvest in the morning and doing the sorting in the afternoon," he concludes, adding that this machine pays for itself in as little as two years, depending on the company's size and sales. (PB/MW)

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How do a Spanish and a Peruvian mango's CO2 footprints compare?

Hot, dry summers; torrential rain causing rivers to burst their banks. These days that is all too familiar. Climate patterns are changing, and the main culprit? CO2 emissions. Primarily due to human activity. Food causes a quarter of global greenhouse gas emissions, so there is an increasing call for people to eat locally grown foods. The idea is that then, at least, CO2 emissions from transportation can be avoided. But, in the Netherlands, does a locally cultivated greenhouse tomato emit less CO2 than one imported from Spain? And what about, say, Spanish versus Peruvian mangoes?

Using statistics, we can tentatively compare a few fruits and vegetables with each other and their country of origin. For that, we use the term CO2eq, a concept that includes greenhouse gases other than carbon dioxide, such as methane or nitrogen oxides (methane is 28 times more potent as a greenhouse gas than CO2). But food obviously has a broader environmental impact than just greenhouse gas emissions. Things like land, water, and crop protection agents usage and soil acidification also play a role. This article will not discuss those.

FOODFOOTPRINT

When talking about food's CO2 footprint, we must first distinguish between plant and animal-based. These have significantly different greenhouse gas emissions, far more than, for example, comparing a mango flown in from abroad and one grown in Spain or Spanish versus Dutch-grown cauliflower. That is because methane plays a major role in meat-derived food production.

The Dutch FoodFootprint website lays out the climate impact (CO2 eq and water consumption) of a portion of some food products, from bread and beverages to meat and fresh produce. A portion is usually 100g for meat and between 100 and 200 g for fruit and vegetables, depending on the product. That is compared to how many kilometers you would have to drive a passenger car or how long your shower would have to be to achieve the same carbon footprint. They get that information from the Netherlands' National Institute for Public Health and the Environment (RIVM). It provides a database on its website about the environmental impact of a range of foods, compiled by means of a Life Cycle Analysis (LCA).

STEAK VS CAULIFLOWER

Please note: all the data below refer to one kilogram of the relevant food product in a supermarket in the Netherlands; if produce comes from several countries, a weighted average is used. Producing, storing, and transporting a kilogram of eggs emits just under 3 kilos of CO2eq. For chicken, it is 4kg; for cheese, between 6 and 9 kg; for pork, more than 7 kilograms; and for beef, it is around 20 kilos. That differs enormously from fresh produce, whose CO2 equivalence is between 200g and 3.5kg.

Carrots hover at a modest 200g; lettuce, leek, onions, bananas, pineapples, and apples produce 100 grams more; and citrus, grapes, and kiwis clock in at 400g. Stone fruit and melons emit 500g; broccoli, cauliflower, and cucumber fluctuate around 600 grams, while mango and avocado barely reach the 1kg mark, as do tomatoes. Mushrooms, peppers, and courgettes emit just about 2 kilograms. Strawberries top the list at 3.3 kilos.

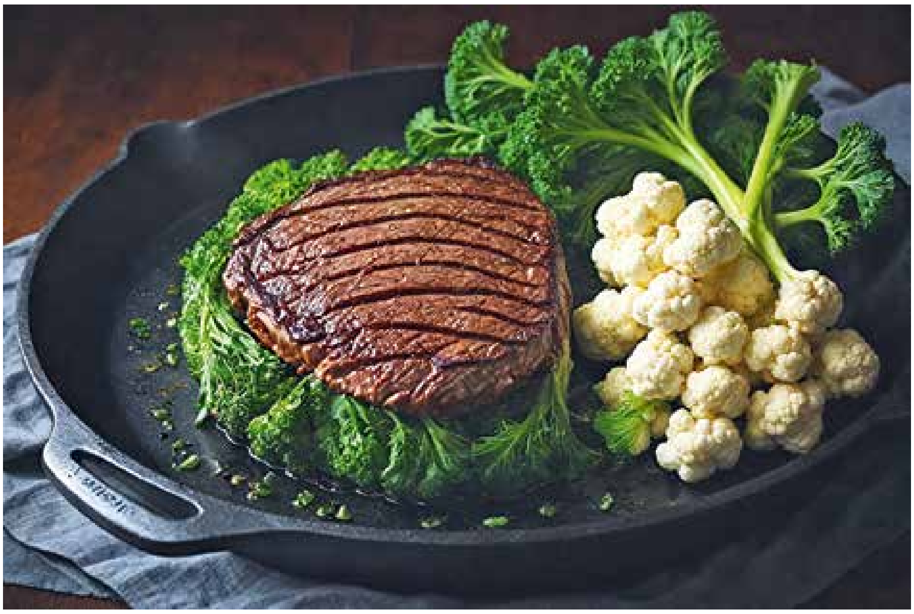
An article by Hannah Ritchie on the Our World in Data website cites a 2018 Joseph Poore & Thomas Nemecek study. That also shows that fruit, vegetable, and potato consumption is associated with far lower greenhouse gas emissions than that of dairy and meat. However, the figures differ slightly. The study involved 38,700 growers in 119 countries and the emissions relate to the entire chain (land use conversion, cultivation, processing, packaging, transportation, and retail display). Citrus would produce 0.3 CO2eq per kilo of product; apples and carrots 0.4; bananas 0.7; tomatoes 1.4; milk 3; eggs 4.5; chicken 6; pork 7; cheese 21, and beef 60.

Here, you must also note that a portion of dairy or meat is smaller than that of fresh produce. Regardless, you can conclude that eating dairy products, meat, and, of course, (ultra)processed products produces more greenhouse gas emissions than eating fresh fruit and vegetables. For example, in terms of CO2 emissions, consuming 100g of pork is the same as taking an 11 km car trip, while eating a portion of kiwi (80 grams) is equivalent to 500m.

THAT WAIT FOR HARMONIZATION

The RIVM did its calculations in 2024. An earlier comparable study in 2019 shows that the environmental impact was considerably higher. That is because the basic data and calculation methods have been updated, explains the RIVM. You can, thus, not rule out that the results will still be subject to change in the future as data collection and calculator methods are refined. Also, not every research institute's analyses include the same elements, which makes it virtually impossible to directly compare the results of different studies. Harmonization in this area will undoubtedly continue.

Within the Corporate Sustainability Reporting Directive framework, large companies in the EU, including supermarket chains, must gradually report their products and activities' greenhouse gas emissions. That includes upstream - those of their suppliers - and downstream - their customers. Here, they commonly use the Greenhouse Gas Protocol. Supermarkets are responding to their shoppers' increasing environmental awareness. The largest supermarket chain in the Netherlands, Albert Heijn, has, for example, been displaying information about CO2eq emissions, or their estimate, on private label products and recipes since April last year. Those show what share of emissions the various chain processes - land use, production, processing, packaging, transportation, and the store - caused.



CO2 equivalent emissions from beef steak 33 times higher than those from cauliflower

TRANSPORTATION'S SHARE

Of food supply, which makes up 26% of the global greenhouse gas emissions, 53% is down to meat and fish production. That includes the production of fodder and the conversion of land use from, say, woodland to pasture. Producing plant-based foods (including land use conversion) causes only 29% of the total. Processing, transportation, packaging, and marketing account for four, six, five, and three percent of the food chain's total emissions. These are 2018 figures from the Joseph Poore & Thomas Nemecek study.

BY TRUCK

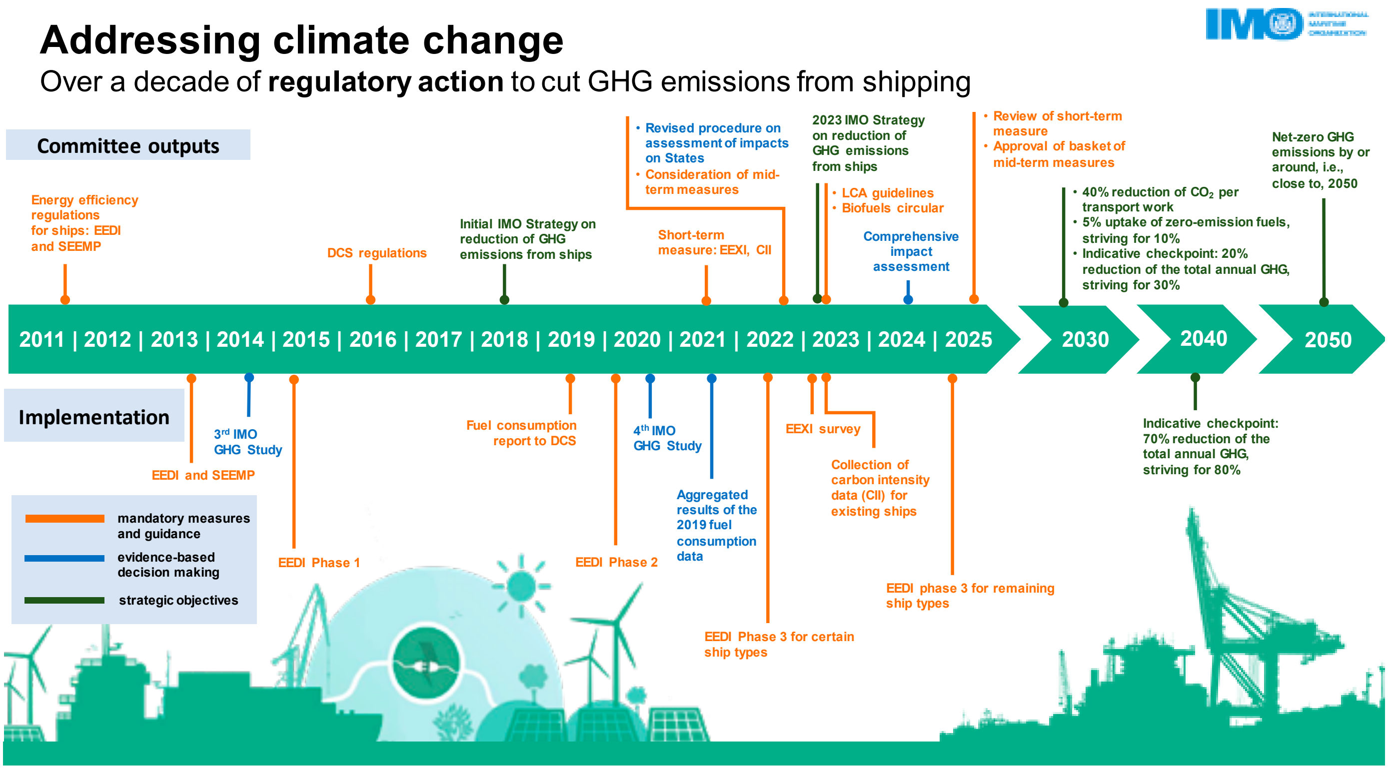
Transporting the Netherlands' food supply causes six percent of those emissions. Take fresh produce: most of that comes by truck, ship, or plane. Assume an average diesel consumption of 40 liters per 100 km for a refrigerated load of 20 tons when transporting tomatoes by truck from Almeria, Spain, to the Netherlands (2,200 km). Then, with CO2eq emissions of 3.468 per liter of fuel (source: Dutch standard list of CO2 emission factors), that trip causes 150g of CO2eq per kg of tomatoes in greenhouse gas emissions.

Tomatoes in a Dutch supermarket (the RIVM stats account for a mix of locally grown and overseas cultivation) come close to the 1kg mark. In that case, road transport makes up 15% of the total emissions. Compare that to the total emissions of a kilo of chicken, pork, or beef (4, 7, and 20 kg of CO2 eq. each), and the tomato's journey from Spain to the Netherlands' environmental impact is not bad at all.

BY SHIP

Some imports come from overseas. Those include China (garlic and ginger, for example), South Africa (mainly citrus and grapes), and Latin America (tropical fruit). We use the "STREAM Goods Transport 2020" report by CE Delft to calculate maritime transport greenhouse gas emissions. On average, a container ship of 12,000-14,499 TEU (medium-heavy cargo) emits 7.8 g/t/km. That means shipping a ton of goods emits 7.8 grams of CO2eq. Based on that, the emission for transporting 1kg of goods from Peru to the port of Rotterdam (approximately 15,310 km) is 120g.

The Smart Freight Centre's "Clean Cargo 2023 Global Ocean Container Greenhouse Gas Emission Intensities" report comes to a similar conclusion: around 110g CO2eq. Clean Cargo is a partnership between sea container carriers, freight forwarders, and cargo owners. That calculation is based on a value of 71.7 g CO2/TEU-km dry cargo on the maritime route between South America and Europe. Avocados, however, are transported refrigerated. For reefers, Clean Cargo uses a value of 138.3 gCO2/TEU-km on that route. That brings the emissions to 0.21 CO2eq per kilo of avocados for the sea voyage from Peru, a quarter more than the car journey from Málaga, Spain, to the Netherlands.



Measures and targets of the International Maritime Organization (IMO) to reduce CO2 emissions from maritime transport. The IMO is a United Nations organization whose goal is to make maritime transport as safe and environmentally friendly as possible.

But, road transport in Peru from the farm to the harbor and in Rotterdam to the product's eventual sales point must still be added. In the case of avocados and bananas, you should also consider the ripening process in Europe. Peruvian avocados will, thus, have an average carbon footprint of at least twice that of its Spanish counterpart. Nonetheless, that impact is negligible when compared to animal-derived foods.

BY PLANE

Some products are flown into the Netherlands. Using the CE Delft database, we calculate that bringing in a kilo of mangoes in the belly of a passenger plane from Lima, Peru, to Schiphol (approximately 10,500 km) emits 6 kg of CO2eq. That is about 30 times more than by ship and 40 times more than by truck from Spain. Air freight mangoes have higher emissions than even chicken and almost as much as pork. Transportation by cargo plane is a little less harmful to the environment.

Air freight is generally used for highly perishable products from overseas countries of origin, like soft fruit, snow peas, and asparagus. That mode of transport's high emissions is why several supermarkets in the Netherlands have stopped selling fresh produce imported in this way.

However, air transportation accounts for a tiny share of the total food kilometers (0.16%), compared to 10% by train, 31% by truck, and 59% by ship (figures from Joseph Poore and Thomas Nemecek, 2018).

DUTCH GREENHOUSE CULTIVATION VERSUS IMPORTS FROM SOUTHERN EUROPE

Then there is the question of whether growing and distributing, say, a tomato from a greenhouse in the Westland region of the Netherlands has fewer emissions than one imported from Almería. We may have found ourselves on shaky ground in the previous paragraphs regarding the various modes of transportation (sources are limited and depend on which elements you include in the analyses). That is even more true when it comes to comparing Dutch and Spanish greenhouse cultivation.

Here too, findings are based on only a few sources, which do not always rely on the same variables for their calculations. And even if we assume that research institutes work objectively, it can still rub you the wrong way when you read that a Spanish fruit and vegetable trade association commissioned a study, or that a breakdown was done for a shipping company partnership.

When comparing a kilogram of tomatoes from the Netherlands and Spain, it is important to know that the mix of tomato varieties in Dutch greenhouses differs from those in Spain. Also, the average yield of TOV and cherry tomatoes per square meter varies considerably. Plus, it is also not always clear whether studies include factors like the manufacture, lifespan, and elimination/recycling of greenhouse materials and equipment when working out CO2 emissions from cultivation.

That would, for instance, be plastic in Almería or glass and energy devices in the Netherlands. Whether or not the greenhouses use heating and/or lighting has a considerable impact on the results, too. For example, in 2022-2023, the average greenhouse gas emissions from tomato cultivation in the Netherlands, when growers all switched their lights off, differed from those in 2023-2024.

Let us assume a Dutch high-tech greenhouse produces an average of 70 kg of tomatoes per square meter per year. Then, the CO2eq emissions per kilo of tomatoes are 0.65. That is based on the Wageningen University & Research's (WUR) Energy Monitor for 2021. It says Dutch greenhouse horticulture has a 45.4 kg CO2eq/m2 annual emission. The Spanish trade organization Coexphal comes up with slightly different figures: In a comparative study, in collaboration with the University of Almería, they arrive at 0.92 CO2eq for cultivation in the Netherlands and 0.36 CO2eq in a greenhouse in Almería (add to that the 0.15 CO2eq for the truck journey to the Netherlands and you arrive at 0.51 CO2eq).

Despite the latter study being done on behalf of a Spanish sector association, you can expect the Dutch tomato supply chain to be less favorable - in terms of CO2 emissions per kilo of product - than the Spanish one. That is despite the transportation kilometers from Southern Europe and the five times higher productivity in a Dutch greenhouse. That could change, though, as the energy supply for lighting and heating becomes more sustainable. Also, there is still room for improvement in productivity in high-tech greenhouses. Spain could, though, also make further progress in productivity.

From January 1st, an individual CO2 tax applies to companies with a greenhouse area larger than 2,500 m2 to reduce greenhouse horticulture gas emissions in the Netherlands. That replaces the cost distribution system (CO2 sector system). The tax authority will collect that fee, calculated on the CO2 emissions caused by using natural gas. It will increase annually, from €9.50 per ton of CO2 emissions in 2025 to €17.70 from 2030.

OTHER ENVIRONMENTAL INDICATORS

The CO2 footprint is, however, not the only aspect of the sustainability framework. Leo Marcelis, professor of Horticulture and Product Physiology at the WUR and leader of a sustainability study on high-tech greenhouses in 2021, states: “The study shows that Dutch high-tech greenhouses score highest on seven of the United Nations Sustainable Development Goals’ 14 indicators relevant to horticulture, compared to other greenhouses used in Europe. This cultivation method uses very little water and land, and fertilizers have virtually zero emission. Also, 100% of high-tech growers use organic pest control as standard.”

In conclusion, consider this comment: To reduce fruit and vegetables, or food in general’s, CO2 footprint, we should strive for more sustainable cultivation, transportation, and storage methods, as well as ways to prevent food waste. Given that no less than 31% of all food produced worldwide is never consumed (Faostat 2019 figures), food waste alone is responsible for 6% of global greenhouse gas emissions. That is according to the Joseph Poore & Thomas Nemecek study. The CO2 that discarded food emitted during cultivation, storage, and distribution was, thus, for naught.

Peter van der Schoot, BioMasters:

"Demand is fast outpacing our cultivation; that's our biggest challenge"

In the Netherlands, FruitMasters and Nautilus partnered around organic produce, limited to a supply platform. Then, a year ago, BioMasters continued as a 100% FruitMasters subsidiary to connect organic and biodynamic fruit supply and demand. And there is ample demand, notes Business Unit Manager Peter van der Schoot.

"Every (retailer) partner has a target for organic, and since FruitMasters supplies conventional fruit to almost all European retailers, they ask if we have organic products available, too. With BioMasters, we can use all FruitMasters' quality, continuity, and packaging development USPs for the organic category as well. The market, food service, and retail sectors, thus, have a one-stop shop for ordering," Peter begins.

BioMasters serves the market from a dedicated organic sorting facility in the Netherlands. With an annual capacity of five million kilos of fruit, it got off to a flying start to further expand the organic category. Primeur spoke to Peter about, among other things, how that growth is being fleshed out, the role of efficiency in the chain, the importance of research, and changing consumer preferences.

Organic acreage in the Netherlands is not expanding rapidly. Earlier, you indicated that you also need growers to meet client demand well. How is it going with organic farming?

"The sector currently finds itself in a fragmented and just too small situation, so unnecessary chain activities lead to plenty of costs. To make the organic chain more efficient, you need more volume. Achieving that efficiency improves growers' revenue models, while currently, growers fit the bill for much of that efficiency. That's our dilemma: you must invest to improve growers earning models. We're doing that at FruitMasters."

"We already know a lot about logistics, efficiency, and cultivation development, and we're now using that for organic as well. As BioMasters, we want to encourage the flywheel effect so earnings models improve because there's ample demand. We're also working hard to increase that market demand even further. Then, to have long-term grower perspective, we must ensure efficiency in the chain."

Can BioMasters provide growers with a guarantee?

"There's such high demand that we can offer growers guaranteed sales and purchase prices, depending on the market segment. Plus, as is common in cooperatives, when more's been earned, we've managed to pay growers a bonus. Last season, we used that guaranteed price to take a position. We were short of fruit and had to much of that from others in the FruitMasters partner network. But, naturally, you prefer developing from your own crop. Because with that, as a grower cooperative, you can keep investing in your members, contributing to product continuity and availability."

"We're a cooperative, so profit isn't our goal. We want to maximize grower returns. Our growers sell directly through us, for which, of course, pay a fee. But that's not a margin. There's currently huge demand, so we're forced to buy

Peter van der Schoot

from trading parties. That means growers don't enjoy part of the margin. BioMasters prefers to reward growers better directly."

"The long-term objective is to achieve a positive return for organic growers. Bio-

BioMasters is looking for new organic or biodynamic producers, such as Willemien Brouwer

Masters draws up multi-year plans with its growers. Those include mutual choices and decisions aimed at improving growers' financial returns. We want to offer them good payout prices so they can continue innovating in variety development and optimizing an efficient supply chain. That's how we impact the organic chain on a large scale."

"We're, thus, looking for organic growers who want to commit to our cooperative. They can then keep expanding, possibly with club varieties. Some conventional growers want to convert, too. These are especially young growers wanting long-term prospects. That isn't widespread yet, but we hope it will become more so."

"We want to reduce the scramble for existing acreage. It benefits no one. We want to grow, so we're also fully engaged in developing new varieties. We have several new varieties we already have experience with overseas and that we see have plenty of potential. We've also planted Bloss and Tessa, for example, organically. We want to expand and want organic growers to join us for that because the more volume, the more efficient it becomes, and the easier we can grow more. Demand is currency outpacing our cultivation. That's truly our biggest challenge."

Grower financing is an often-mentioned hurdle; is that different in the organic sector?
"Banks want limited risks. Cooperatives or trading parties providing guarantees create models banks are willing to consider. The most important thing is that you have a true chain approach. You need all the links for that. If one party does things differently, you won't get anywhere together. That's the paradox in which the organic sector has existed for a very long time. We hope to break through that with our top and soft fruit cooperative."

"Banks are becoming noticeably more receptive to that, as are retailers. If we want an organic market share of 10% by 2030, we need chain cooperation between banks, cooperatives, and retail, and we must get moving now. Parties understand that has to happen."

BioMasters serves clients year-round, and you say you want more volume. How are you meeting demand?
"Our retail strategy states we meet organic fruit demand year-round. We do that with Dutch fruit when available. Otherwise, we get it from as close as possible: France, Germany, and Italy. We try to increase the proportion of Dutch fruit annually so we can guarantee that too. We now supply Dutch apples until about March. So, there's quite a short period to bridge. We also try our utmost to supply European apples and avoid overseas imports even in the most difficult times - July and August. We manage that by concluding programs and entering into collaborations. Because here, too, it's about the long-term perspective. The free market can't always provide a solution."

Organic and conventional fruit prices still seem to differ. How does that impact the market?
"That price gap should shrink further, but through great chain efficiency, not by squeezing the grower. That decrease could be significant, but that would require the chain to approach costing and margin calculation differently. Organic products are somewhat pricier; if you stick to a percentage margin, the absolute amount becomes higher. If the chain as a whole considers those aspects, I believe growers will, eventual-

ly, earn more. That's because everything has become more efficient, and retailers have less of a margin target. You could, thus, achieve a considerably more attractive price difference."

How is the development of organic apple varieties going?

"In that regard, there's no total solution. Many varieties have been introduced in recent years, leaving growers to wonder if they should still plant those, or grub the trees already standing because of disease susceptibility and unforeseen challenges. The bottom line is that developing a crop takes a long time and continuous investment in research. You must keep developing structurally because one thing is sure: robust, flavorful apples are the future."

"People want tasty, high-quality apples, so this development will continue. That's why I think, in about a decade, because of climate change, the acreage of existing organic apple varieties will have shrunk, and new varieties, such as Tessa or Bloss, will prevail. We must, thus, invest in research if we want to keep organic apples relevant in the long run. The public likes hard apples."

"That's why we're researching Bloss. We're seeing if we can also grow Tessa organically, which FruitMasters grows conventionally. Santana and Topaz, too, hold their own in organic production. If you want to offer year-round Dutch apples, you need an early and a late variety. Santana is an early apple, which we market in the first half of the season until December. I'm short of these for two months, so we're looking for extra volume in the Netherlands. We sold plenty of Topaz as well. The good thing about both varieties is that they're productive organic apples with 35 - 45 tons per hectare yields. Your business case must be right, too, mustn't it?"

What do you think of club varieties?

"Club varieties have the advantage of having dedicated parties that invest in European research. For instance, for Bloss, we, the Germans and Italians, always did research together, which, of course, helped enormously. In conventional apple growing, many growers often only want to invest in club varieties because they get better returns. If we keep doing enough research, I strongly believe that will be the same for organic. Especially since it's European research and plenty of money goes into marketing. That way, you know you're creating consumer preference."

Organic top fruit is cultivated throughout Europe. Do you experience competition from that?

"Less in apples than pears. Dutch people prefer Dutch apples. Europe-wide, Poland is entering the organic market in full, and that's particularly dangerous for pears. Because the season starts slightly later, plenty of those are being sold. It's challenging, so we must keep investing in the correct quality and quality systems to stay ahead regarding performance and specifications."

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Craig Thomas, CSJ Agri:

"In most cases the solution is already out there"

Growers across the globe face on-going challenges such as disease, pests and climate change, it can take years and a lot of money to breed new resistant varieties. Most growers tend to stick with the seed houses they have been working with for years and work with them to develop new varieties. This does produce results, but it can take years to develop the new varieties, what if the solutions to these problems were already out there?

Craig Thomas has over 20 years of experience in the fresh produce industry, almost 14 years of which have been in the seed business. He has built a wide knowledge of what growers wants and needs are and can match this up with solutions - travelling the world to find them.

His new business venture CSJ Agri aims to deliver exactly that - "In most cases the solution is already out there," says Craig. "An issue faced by a grower in the UK may have already been experienced by a grower in South Africa or in America for example. If you can match the needs with a solution which is already there then there is no need wait for years or go to the expense of developing a new variety."

CSJ Agri has launched in herbs, baby leaf, spring onions, micro-greens, root crops & oriental vegetable but there is an ever-increasing range of crops as more growers look for solutions to challenges they have historically faced.

Craig added "A grower can lose a significant amount of money if their crop is impacted by disease or environmental stress, and waiting years for a solution simply isn't an option. If I know of a grower facing a similar challenge or a seed house with the right solution, I can quickly connect the two — ensuring access to the best genetics available. At CSJ Agri, integrity is at the heart of everything we do. Growers trust us to provide solutions that are not only effective but also sustainable, helping them navigate challenges with confidence."

CSJ Agri also offers a suite of bio stimulants to further aid growers – "delivering solutions from seed to harvest includes our bio stimulants range which offer zero residue, chemical free solutions to farms battling bacterial and fungal challenges during critical growing periods of crops. It means we are offering truly new and sustainable solutions vs traditional methodology."

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Exclusively filling in the gaps for other exporters is now a thing of the past:

"Portuguese melons are now supplied directly to retailers and importers"

The cultivation of mini watermelons and melons will have a bit of a late start, as weather conditions have caused flooding and other inconveniences, says Tania Silva, who does sales for fresh fruit exporter Rush Farms Portugal: "Due the storms and bad weather in Portugal and Spain, the cultivation for both mini watermelons as well as regular melons is late, because the fields were under water. Although a gap in May and June is expected, we were able to plant our watermelons in open filed and we will cover our programs to satisfaction. Regarding the melons, it was affected not only for late planting, but also the acreage is very low in comparation of last year."

Looking at the overall supply, the mini watermelons will mostly be in a stable spot, but Silva emphasizes that the supply of regular melons might be lower than usual. "For watermelons, there will be gaps in some weeks, and oversupply in others. Regarding the melons, the supply will be short, due the reduced areas of production and the late planting. Production hasn't had the easiest time in the past three years, as we've had to deal with heatwaves, storms and other extreme weather phenomena that either destroyed fields or decreased the quality of fruits, resulting in gaps in the supply. We also need to take into account that other fruits have also had to endure heavy damages from the weather, such as stone fruits. As these fruits will be in lower supply, more people might turn to the melons and watermelons, making it the pick of the season. So we expect strong demand this summer"

Although consumers will usually jump on the next hype-train when it comes to new products, Silva has noticed that the basic properties of their product has once again become the most important aspect that consumers look for: "Innovation is present in farming, to be able to have new products which are not only more agronomic interesting, but also gives the consumers that desired 'wow factor'. There are examples of such products, like the Dino melons or Waikiki. However, cur-

rently we were noticing a trend of 'back to basics' for the products, where the brix levels and the right maturation of the fruit are the key points that consumers were looking for. To fill that demand, we are continuously promoting our white melons, a product that in terms of both flavour and brix is the top regions, meeting the preferences consumers have. Now, admittedly, the white melon is not the most beautiful melon on the market, but the right marketing will ensure that its presence in French, Portuguese and Spanish markets will grow."

Overall, Silva has noticed an increase of interest when it comes to Portuguese watermelons and melons, as they now supply supermarkets and importers directly, instead of just covering gaps in other exporters' supply. "The export volumes for melons are increasing year after year. We have a unique approach to the culture, and handle the entire process from production, to harvesting, to packing, and that is noticeable in the results that we achieve. The buyer profile is changing as well. When before, most of clients were Spanish or Italian producers looking to cover their gaps, in the last years this situation has changed and we are not contacted to directly supply both the supermarkets and as well as importers."

The weather has played a major role in the price levels for the melons in recent years. Silva states that when prices go down during the season, the weather always delivers some kind of blow, causing prices to rise: "The prices for melons and watermelons have been rather similar in terms of the behaviour over the course of the full season. The season usually starts with more expensive prices, then it calms down for a while, only to increase once again after some form of weather issues. For us as a company, we increase our acreage very carefully, making sure that we can sell while covering all of the costs. We have a considerate volume available, but the sales are all planned and pre-sold."

Rush Farms Portugal puts emphasis on making their export operation more sustainable, Silva explains. "Our agronomist José Rodrigues is continuous pushing us to go forward and try new approaches. Beside the usually field trials, we work continuously in methods to have more production per hectare, while having a sustainable farm at same time. For example, we produce in Residue 0, Regenerative farming. Our fields are chosen with consideration to the water availability and also the distance to our warehouse, to reduce the carbon foot print even further."

"I think it will be a key season to establish ourselves as prominent player in the melon and watermelon segments. With every product, in every season, there are always challenges. However, with good planning and clear communication to our clients, we are and were able in past, to solve any issue regarding volumes. Overall, it will an interesting season!" Silva concludes.

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Jacobus van Staden, Sunfed/Soleil Sitrus

Empty market welcomes South Africa's early citrus

The Soleil Group, situated in Hoedspruit Limpopo, has citrus farms and packhouses in Limpopo. The company is among the earliest in South Africa to start exports when supply chains switch over to the Southern Hemisphere, giving them direct exposure to the last of the fruit from Turkey, Spain, Egypt and Israel.

This year, that exposure has been minimal as many Northern Hemisphere production areas ended earlier, including China whose domestic crop is down, an excellent position from which to kick off the new season, says Jacobus van Staden, Sunfed founder and managing director.

"Especially from Europe there have been many enquiries into early season lemons, before the Eastern Cape harvest starts, about a month after us." In Europe, he remarks, South African Eureka lemons are preferred to the Spanish Verna.

The Middle East is traditionally the early strong market for lemons, which can be to its detriment when it is overloaded and crashes a few months in, as happens many years and in his opinion, in terms of lemons. it will probably start declining by June.

"Every year Russia takes higher volumes of our citrus. It's becoming a larger and more important market to us, with more stable prices. I think the relationship that our country has with Russia makes it an important market for the future."

INVESTING IN GRAPEFRUIT CONSUMPTION

Grapefruit has become the most difficult citrus category to manage, requiring careful coordination among growers not to oversupply markets. In fact, the level of cooperation among grapefruit farmers and exporters is perhaps unrivalled in South African fruit exports.

Consumer demand for grapefruit has slackened in many markets, and the citrus industry hopes its promotional campaign planned for May will stimulate grapefruit demand across a number of markets, especially among younger consumers.

Several years ago the one of the biggest buyers of South African grapefruit used to be Japan: last year, not even a million boxes went there. The population is ageing and with it the appetite for grapefruit which has drastically dropped. Moreover, grapefruit go to Japan on conventional (breakbulk) vessels, the most expensive form of seafreight.

South Korea has been taking Japan's place in this regard. "South Korea is to some degree more stable than Japan, but that said, markets in Asia are always up and down, according to the forces of supply and demand. They're very sensitive to oversupply," Van Staden says.

Not many manage to successfully export grapefruit to South Korea. The fruit is finecombed for signs of mealybug by a South Korean inspector based at Durban port, and some seasons there can be many rejections. Soleil Sitrus is one of two dominant grapefruit suppliers to South Korea, a position they carefully protect.

Recently as a mark of confidence in South Africa's seriousness around compliance, the government of South Korea agreed that the South African department of agriculture can be entrusted with these inspections. "We're very pleased about this development and we expect that the inspections will be quicker. The past year or two there was a lot of delays with a single inspector for all shipments."

OJC PRICES ERODE GRAPEFRUIT ACREAGE

South Africa's grapefruit volumes have remained stable over recent years as growers held on to their orchards. Van Staden expects that the pace of grapefruit orchard removals will pick up in response to last year's historically high orange juice concentrate prices.

The juice concentrate price won't repeat that performance as the global availability of juice concentrate increases. In Egypt many exporters and growers have already, or are planning to set up juice factories to share in the windfall from which South Africa handsomely benefitted during 2024.

Egypt's increased involvement in the juice market is no bad thing, Van Staden reckons. "Having the options of sending second class oranges for juicing will keep a lot of lower grade Egyptian fruit off the market, and it creates better chances for class one fruit, especially towards the latter part of the year."

A large percentage of Soleil Sitrus' fruit is destined for Europe, which can be a high-risk destination for phytosanitary reasons. "We just make sure we know what's going on in our orchards at all times. We know our blocks well: some blocks we will never pack for Europe to reduce the risk, while those we earmark for Europe are scrutinized. Every week scouting reports are compiled and if we pick up the least indication of the appearance of a pest or disease, we immediately pay close attention."

As the industry annually loses permission to use chemicals deemed hazardous – such as a certain fungicide that has long been a stalwart in the fight against citrus black spot – its industry research body Citrus Research International works around the clock at finding replacements for next season.

"Every year we're getting better at biological control," he says. "It's become a very important aspect of integrated pest management. You cannot take your eye off the orchard for a moment."

Looking ahead at shipping, he remarks that they have for the moment decided not to send any citrus from the Middle East through Mozambique's Maputo port, due to recent political unrest in the Indian Ocean country.

The Soleil Sitrus group employs 370 permanent employees and provides an additional 500 seasonal employees with jobs.

"Our citrus brands are renowned for delivering top quality fruit that surpass consumer expectations," he says. "Favourable climate conditions enable us to produce citrus with near perfect balanced sugar levels. It is globally recognized among buyers that grapefruit from South Africa's north surpasses those from the Western and Eastern Cape."

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Raphaël Martinez, PDO Pêches et Abricots de France:

"Promotion of the French origin certainly helps in protecting our sector"

It is still too early to forecast for the next stone fruit season - estimations for peach and nectarine will be released in May and about 4 weeks after those for apricot, expected during the French event medFEL. But Raphaël Martinez, Director of the PDO Pêches et Abricots de France, already outlines the challenges of the coming season. "What is certain is that the high harvest potential for apricots is evolving towards a normal potential, due to difficult climatic conditions during fruit set. Therefore there is a risk of early varieties shortages".

What is at stake for the 2025 campaign?

The concerns for the coming campaign are more or less the same as last year's, price being an absolute priority. "It is first in mind", confirms Raphaël Martinez. "We have to add value to our production, and this inevitably reflects on price. In recent years prices were generally too close to cost prices. Apart from periods of crisis – like for apricots in 2023 and peaches at the start of the 2024 season. Today, French production is perfectly in line with the needs of the French market, provided that weather conditions are favorable and that Spanish, Italian, Greek and Moldavian production do not intrude, with the risk of causing more pressure", according to Raphaël. "The gradual loss of export markets due to prices that are incompatible with production costs has led to the disappearance of farms and the reduction of domestic production areas. Today, 80 to 90% of the French production is focusing on the French market itself". Despite this tight competition, consumers and distributors have for some years been "recognizing French origin, thus helping to protect the French industry to a certain extent".

This promotion of 'Made in France' requires a commitment from distributors, now signing "partnership agreements". This new formula, initiated by the PDO at the end of 2024, is no longer based on demands, but rather on listening to each other's expectations. The first agreement was officially signed last February during the Salon de l'Agriculture, between producers and the Carrefour group. Other retailers are expected to follow in the coming weeks. The core of this supermarket/producer partnership includes switching to French production as soon as it becomes available, promotions and events, supporting a sustainable agricultural approach (Vergers écoresponsables) as well as training and educational tools for retail staff, including sales assistants and department managers. The agreements also include specific features depending on the supermarket: adapting the range, origin transitions, communication, logistics, etc.

Another central concern is crop protection. "We are running out of solutions," warns Raphaël Martinez. The stone fruit sector, like other fruit and vegetable, has to cope with the gradual disappearance of active ingredients. "For some pests, there is only one authorized product left and with a narrow spectrum". The stone fruit industry, together with several other professional agricultural organizations, is therefore addressing regulations

institutions and implementing strong lobbying and legal actions. R&D investments also play an important role: "trials are currently being carried out in agroecological systems, with combined biocontrol and auxiliary work, besides the selection of resistant varieties. And actions are undertaken to speed up the approval process for new molecules".

Could French flat nectarines win back market share from Spanish flat peaches?

The flat peach segment, currently representing nearly a quarter of the French market, is 80% dominated by Spain. But the situation could change in the midterm, thanks to a reflection on the development of this segment started last year. The French sector faces Spanish flat peaches, which are generally of high quality (due to the amount of sunshine they receive) but also less expensive. "The challenge is to achieve producing a French product that is economically viable. We need to develop an offer able to capture a share of this market". Despite a more extensive range of flat peach varieties, the organization is focusing on flat nectarines. "For the moment, flat nectarines offer more advantages from an economic point of view, as the Spanish offer is underdeveloped (80% of flat nectarines on the French market are French). To assess the interest of a French offer in this segment, the PDO Pêches et Abricots de France went to Marc Henri Blarel for advice. He is a consultant specializing in F&V distribution and consumption and to the question: is there a place for the French product? His answer was: "yes... provided we do things in a structured way; choose good varieties and communicate on the French origin as well as on taste". Meetings with 6 breeders and variety editors were organized to review the varietal landscape and perspectives. With the exception of the club variety Ondine developed by ASF, which is already well established, flat nectarines are still underdeveloped. There are currently 6 producers of flat peaches in France, and 4 to 6 more are expected to add flat nectarines within the next 3 years. "10 ha of flat peaches and nectarines were planted this winter by members of the PDO. Some believe in it, others don't really, but we encourage as many plantings as possible, in order to catch the interest of some retailers in French produces. This would greatly facilitate the development of this segment", concludes Raphaël Martinez.

The research was led by virologist Giuseppe Parrella and his team

Unprecedented discovery of new virus on watermelon found in Italy

Over the past decade, there has been a global increase in viruses affecting watermelons due to a combination of interrelated factors: climate change, agricultural intensification, globalization and trade, virus evolution, loss of biodiversity, and poor management practices.

Climate change, such as rising temperatures and changes in rainfall patterns, can affect the distribution and abundance of insect vectors that transmit viruses to plants. Warmer climates may favor faster reproductive cycles for these insects, increasing the spread of viruses. Increased international trade also facilitates transmission to new geographic areas. Infected seeds, seedlings, and fruits can be transported from one region to another, introducing viruses, or their vectors, into previously unaffected ecosystems. Viruses can evolve rapidly, developing new variants that can more easily infect plants or evade their natural defenses.

The reduction of genetic diversity in agricultural crops has been demonstrated to increase the plant's vulnerability to infection. The use of similar varieties limits the ability of plants to resist new viral infections. In addition, in certain areas, a lack of understanding of the most effective disease management practices can contribute to the spread of viruses.

In 2021, two new viruses were found on watermelon in the United States, first in Texas and then in Florida. A similar situation occurred in Italy, where a new emerging virus affecting watermelon was identified for the first time in the Campania region, specifically in Eboli and Battipaglia (province of Salerno). This virus was identified by Giuseppe Parrella, a virologist and researcher at the CNR-IPSP in Portici, Naples.

The virus was identified in samples collected in 2023 through the use of NGS (Next Generation Sequencing), a sophisticated technology that facilitates the identification of all the viroma present in a plant. The virus identified was classified as Watermelon crinkle leaf-associated virus 2 (WCLaV-2), which had never been reported in Europe before this discovery. However, its presence had previously been documented in China, the United States, Brazil and Australia. This information was provided by Parrella.

"We are concerned about the presence of this virus," says the virologist, "because little is known about it, as it belongs to a recently described and still poorly detailed taxonomic group of viruses: the genus Coguvirus, which belongs to the family Phenuiviridae. While there is evidence that these viruses are transmitted by grafting, it remains to be determined whether a suitable vector exists for their transmission in the wild. It is noteworthy that the incidence of the virus in the field is high, reaching 60-70% in some cases. Consequently, we hypothesize that the widespread presence of these viruses in the field may be due either to the presence of a highly efficient vector or to the transmission by seeds. It should be noted, however, that these are still hypotheses, although they are supported by some preliminary evidence or by the fact that the Phenuiviridae family includes ecologically diverse viruses, some of which are transmitted by arthropods and are capable of infecting not only plants but also humans and various animals. It is also noteworthy that WCLaV-2 is included in the EPPO (European Plant Pathology Organization) alert list, which underscores the need for increased vigilance regarding the presence of this virus in crops. It is important to emphasize that further extensive research is needed to fully understand the biological properties and characteristics of WCLaV-2, particularly with regard to its mode of transmission."

"Another alarming discovery is the fact that this virus has often been found in association with another group of viruses also emerging on cucurbits: the Polerovirus (e.g., Cucurbit aphid-borne yellows virus CABYV). In such instances, the symptomatology observed in the field is complicated by this combination, which is difficult to identify in isolation."

SYMPTOMS OF WCLAV-2

"The viral infection of watermelon plants is characterized by the development of wrinkling and blistering of the leaves, especially those located at the apical meristem. In addition to these symptoms, a yellow mosaic pattern and a yellow mottling pattern have also been observed on the leaves. The stem also shows a reduction in internode length, particularly in the distal section. The overall effect on the plant is stunted growth and reduced vegetative development. Fruit set is often poor or of very poor quality and deformations and circular lesions are often observed on the fruit. These symptoms are similar to those reported for a second virus: Watermelon crinkle leaf-associated virus 1 (WCLaV-1), which is closely related to WCLaV-2 but has not been detected in our crops, although the potential for introduction exists. In other countries, such as the United States, these two viruses are often found together in watermelon crops."

SYMPTOMS OF WCLAV-2 ASSOCIATED WITH POLEROVIRUS

Given the frequent association of this virus with Polerovirus that causes leaf yellowing, the symptoms described are not well recognized in such cases, as leaf yellowing tends to predominate and mask the characteristic signs of WCLaV-2. "There is a need to develop a sensitive and specific diagnostic method that allows the control of plant source material (seeds and plants) and the epidemiological study in the field. The formation of a collaborative group of motivated and experienced researchers is crucial to facilitate comprehensive research on this virus.

Finally, it is recommended that all growers and field technicians closely monitor watermelon crops and report any anomalies," Parrella concludes.

Turning point for Morocco's avocado industry

The Moroccan avocado export campaign came to a late end this year, and the reason is none other than a problem the industry can't seem to shake off just yet: withholding harvests in the expectation of better prices, in what looks like a tug-of-war between growers and exporters. The season's success has been mixed, with record export volumes but falling prices, and it seems that the industry players can only achieve two corners of the perfect triangle in the same season: good weather, good volumes, or good prices.

In the 2022/2023 season, prices were at their highest for Moroccan growers and exporters, making Moroccan avocados the second most expensive in the world. The following season, 2023/2024, prices continued their upward trend, but the Bernard storm accompanied by other climatic phenomena such as Chergui (hot, dry winds) led to the loss of over 10% of national production. Export volumes nevertheless reached an all-time high of 60,000 tonnes. This season (2024/2025), production and export records were beaten by more than 85%, but prices fell by 20%.

A NEW ALL-TIME RECORD: OVER 100 THOUSAND TONNES OF AVOCADOS EXPORTED IN 2024/2025

For Abdellah Elyamlahi, President of the Moroccan Avocado Association, representing exporters, the season remains memorable: "The 2024/2025 season is the first time we have reached the 100-110 thousand tonnes mark in export volumes, for a production of around 130,000 tons. This is the second year in a row that Moroccan producers have achieved an all-time production record. Weather conditions were excellent, with no excessive heat or storms, leading to good flowering and fruit development. In terms of production, everything went smoothly."

This season, according to the exporters' representative, demand was unsurprisingly dominated by the three main historical markets for Moroccan avocados, namely, in order of volume, the Netherlands, Spain, and France. He adds: "There was also strong demand from Germany, Italy, Russia, Qatar, the United Arab Emirates, Ukraine and Poland. We are seeing changes in the market. For example, Russian buyers used to import the green-skinned variety, and this year they've turned to the Hass variety in small sizes. New markets are also developing this season, such as Turkey and Scandinavian countries. The European Union's market as a whole remains our most important destination, where we have an edge on the competition, especially in the preferred sizes there, 16, 18 and 20."

OVERPRODUCTION LEADS TO FALLING PRICES

The international market absorbed this sharp variation in production without any difficulty, more or less. Elyamlahi says: "Demand was very good for most of the season, despite strong competition. This means that the market has room for our fruits. However, prices were on average 20-21% lower than the previous season. Prices were the lowest of the season in December, then improved in January and again in March. In addition to the significant increase in Moroccan production and internal competition pushing down prices, there was also a lot of fruit from Peru, Colombia, and Israel, and it's normal for prices to fall. I would say that Moroccan avocado prices are stabilizing after a period of strong growth."

Since avocados can be stored on trees, many Moroccan growers abstain from harvesting in daily expectation of better prices. As a result, at the end of January, three months into the season, half the season's volume was still on the trees. Elyamlahi comments: "This is a practice that many players in the sector deplore. It discredits Moroccan origin, disrupts supply, and causes prices to fluctuate constantly. But things are improving from one season to the next, as the sector, still in its early years in Morocco, gains in experience and maturity. This season, the cumulative delay in harvests was only two weeks, and growers have accelerated harvesting since the end of January when prices improved."

Elyamlahi adds, "The surface area has increased from 6,000 hectares in 2020 to 12,000 hectares in 2025, and will eventually reach 15,000 hectares within two years. In addition to the extra acreage, we expect yields to increase from the current average of 10 tonnes per hectare (while some growers achieve a yield of 17-24 tonnes) to 15-20 tonnes per hectare. After that, we'll be in the business of improving quality and yields rather than massively increasing volumes. On the other hand, world demand for avocados is growing by 4.85% a year, and will continue to grow linearly, if not exponentially, making the price drop temporary."

"TODAY, MORE THAN EVER, WE NEED MORE CONCERTED ACTION WITHIN THE INDUSTRY"

The market for Moroccan avocados, still limited geographically, is barely keeping pace with a great boom in production. According to Elyamlahi, now is the time to capitalize on the sector's achievements and gain in professionalism and integration. He explains: "The industry needs better organization, in terms of synergy and centralization of data and decisions. We need, for example, to break with practices such as speculation and harvest abstention, and reach out to each other as internal competitors to improve farming practices and gain together in quality. Moreover, this is a crucial time to open up new markets."

According to Elyamlahi, the Moroccan avocado landscape currently comprises a little over two hundred growers, half of whom have large acreages (over 5 hectares), located mainly in the Tafilalet-Larache region on the country's north-west Atlantic coast. As for exporters, there are no more than twenty companies, half of which have their own production. While the majority of growers are members of the Gharb Avocado Growers Association, chaired by Abdelkarim Alaoui, most of exporters are organized in the Moroccan Avocado Association (MAVA). Until now, the sector has not had an organization covering the entire value chain, nor an interprofession, and has not met for an annual event like their counterparts at the Moroccan Tomato Conference. Yet the two sectors have similar sales figures.

The exporter adds: "Today, more than ever, we need more concerted action within the industry. We're already pleased to see that there has been a lot of consistency and coherence this season, and a less distrustful relationship between growers and exporters. For example, prices have remained stable for four months this season, which has never happened before. We have been working on the establishment of an interprofession, which will be launched next season and will be our interlocutor with the government. It will also be the privileged framework for consultation and knowledge transfer between the players in the sector, in order to improve quality across all growers; and provide our best means of tackling, in unison, the issues that concern us in terms of both production and marketing. We are also working on the forthcoming launch of an annual gathering of industry players at national and global levels, which will enable us to get closer to our customers and our ecosystem. The fruits of all these efforts will see the light of day very soon, hopefully next season."

PROMISING PROSPECTS FOR 2030

One major market, if opened, could be a game changer for Moroccan avocado exporters: the United States. The opportunity is particularly attractive amid the trade war in which Mexico, while having a stranglehold on avocado exports to the United States, is targeted by the Trump administration. Morocco is on the other hand only affected by a tariff rate of 10% (even though trade between the two countries is governed by a free-trade agreement). Elyamlahi says: "We have been in the process of concluding a phytosanitary agreement to open up the American market for two years now. I would say that the first exports to the United States will take place next season, or by 2027 at the latest."

"Also in terms of geographic expansion of our markets, we're counting on other important destinations, such as Canada, and Arab countries like Jordan and Saudi Arabia, even if competition will be strong with East African origins. The Scandinavian countries are also a very important market where the potential of Moroccan exporters is under-exploited," Elyamlahi continues.

The development of these new markets is crucial if exporters are to reverse the downward trend in prices, as the commercial window for Moroccan avocados is unlikely to change. In recent years, growers have tried to extend the season with the Lamb Hass and Maluma varieties, without success. "The Hass variety is the most popular and will continue to dominate production, at 90% of volumes. Seasonality will therefore remain the same in the foreseeable future. On the other hand, we will need new destinations for all our production. Volumes are expected to increase to 150,000 tonnes next season and 200,000 tonnes by 2030, which is the saturation point we anticipate."

"The challenge is above all to improve quality. Today, we're at the lower tolerance limits of Class 1, and we need to push the limits. We're talking here about the aesthetic aspect of the fruit, such as eliminating black spots or stains on avocados. This involves small, ingenious but effective gestures, such as choosing the right time of the day to harvest, as well as more complicated agricultural and logistical choices, such as disease treatment or post-harvest handling. We want this knowledge to be transferred and generalized to all growers, including small-scale growers, and not be a field of internal competition, for the sake of the origin as whole," Elyamlahi concludes.

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Which tomatoes do customers prefer, the supermarket private label or a commercial brand?

Most companies work, if not under their own brand, under a corporate banner; but many of those who work with retailers, especially with discounters, see their products end up falling under a private label, or simply given a descriptive name for the product itself. But what do customers prefer?

There isn't a simple answer to this question, because as revealed by international experts who participated in the Tomeet tomato congress, held on April 2 in Almeria, Spain, there are huge differences between similarly mature markets such as the European, British or American, given their widely different dynamics when it comes to consumption in the fresh tomato category.

While in Spain and the United Kingdom, private labels and more attractive prices have managed to capture the largest share of the tomato market, in the United States, consumers show a clear preference for commercial tomato brands that ensure a tasty and homogeneous consumption experience, regardless of the higher price.

"In Europe, private labels currently account for about half of the market share in terms of value. In fact, 58% of grocery shoppers participating in our most recent study said that they now buy more private label products than before, but also more promotional products," said Maria José González, Consumer & Marketing Insights Executive at NIQ, emphasizing the weight that the price factor has on the purchase decision of the average European consumer.

Tomatoes are the most important product in the fresh vegetable category, with a 18.4% share, as well as the most relevant in terms of turnover, "but while consumer prices have generally evolved positively, with a 2.3% growth, tomato prices have dropped by 7%."

The category's situation is very different in the United Kingdom, where it recorded 7.5% growth in 2024. Nevertheless, prices remain a determining factor in the choice of one tomato over another. "Con-

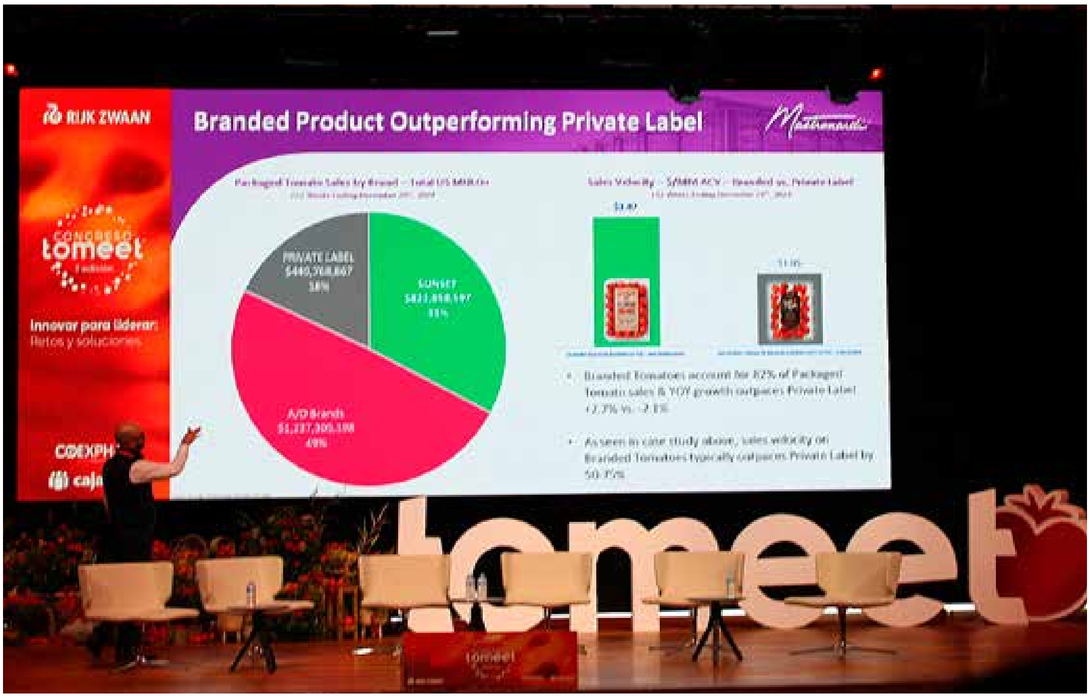
sumption in the UK is frequent, but not loyal,” says María José. “There isn't a single category or variety that stands out in terms of market share. Also, one out of every two consumers who have stopped consuming a type of tomato or are consuming it less frequently tells us that price is behind that decision.”

However, Liam Booles, Commercial Director of APS Group, noted that regardless of the data, consumer expectations appear to be changing. “We're moving from a situation marked by an economic recession in which discounters like Aldi and Lidl were growing significantly, to a different one now in which Tesco and Sainsbury's report great sales and are achieving really significant growth.”

“What we're seeing is that these changes in the market are being driven by the consumer, by their attitude towards healthy living, and for the first time in a decade, fresh produce in general is gaining market share in the UK.”

What's more, in the UK market, there is a “large-scale switch to premium products,” he says. “In tomatoes, typologies such as round tomatoes are losing ground to cherry or baby plum tomatoes,” and so, one of the key strategies proposed to boost the category was to “premiumize” it, delivering tomatoes that “no one can compete with, making sure that the customer consumes the product, loves it and wants to buy it. To achieve that, we must start from scratch and convey that message throughout the entire process.”

This is what the United States has done. Liam says that just as Morocco is a major competitor for Spain, the Netherlands is a major competitor for the United Kingdom's production, with no less impact on its market. Jumping to the other side of the Atlantic, Amar Raja, VP of International Development at Mastronardi Produce (Sunset), said that a more synergistic strategy has been developed between the world's largest tomato importers and exporters: the United States and Mexico, respectively, and American consumers know the tomatoes by their own names.



"Mastronardi Produce is, by far, the largest producer and marketer of tomatoes, peppers and cucumbers in North America," said Amar, who has been based for the past few months in the United Kingdom in the framework of the company's plan for international development. "We have more than 6,500 acres in production. About 60% of our production is in Mexico and 30% comes from Canada, while there is only 10% in the United States."

Looking back, the company's real growth spurt came in 1995, following the success of Campari. "Campari was the first branded cocktail tomato in North America, and since then we have implemented various strategies over time, incorporating brands and varieties always based on taste, getting consumers hooked and attached to the taste and brands."

"I am British, and when I went to the U.S. I was impressed by the appeal, colors and excitement conveyed by brands for products that are rather boring in Europe, such as vegetables. In fact, over 80% of tomatoes sold in the U.S. are branded, as opposed to private labels, which account for less than 20% of the market. Our Sunset brand, in particular, represents 33% of total sales."

This development is taking place in a country, the United States, where 70% of the fresh tomatoes consumed are imported, and 99% of those are imported from Mexico and Canada. "One of the most interesting statistics is that 63% of retail consumer spending corresponds to premium snack tomato varieties worth $2.9 billion. "That's a huge number, and it shows us," he said, alluding to Liam's presentation, "that consumers prefer premium, flavorful, quality products; but we also believe that they need to pay more for them."

"People want flavor and premium products offering an experience that they'll be able to repeat; and, in that, I think we are a little ahead of the journey that perhaps Europe will also want to undertake in the next few years," he concluded under the attentive silence of the congress listeners, many of them Spanish, who have become used in their day-to-day lives to dealing with price struggles and their brands falling under private labels, and appeared interested in hearing about this alternative approach.

Colophon

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