

PALTRADE Seminar
EU market exploring certain fruits and vegetables
by Raymond Tans, The Netherlands



PALTRADE Seminar Fruit and Vegetables

Content presentation:

- Fruit and vegetables in The Netherlands
- Imports and exports in/to The Netherlands
- Distribution channels
- Competitors and positioning
- Examples of niche marketing



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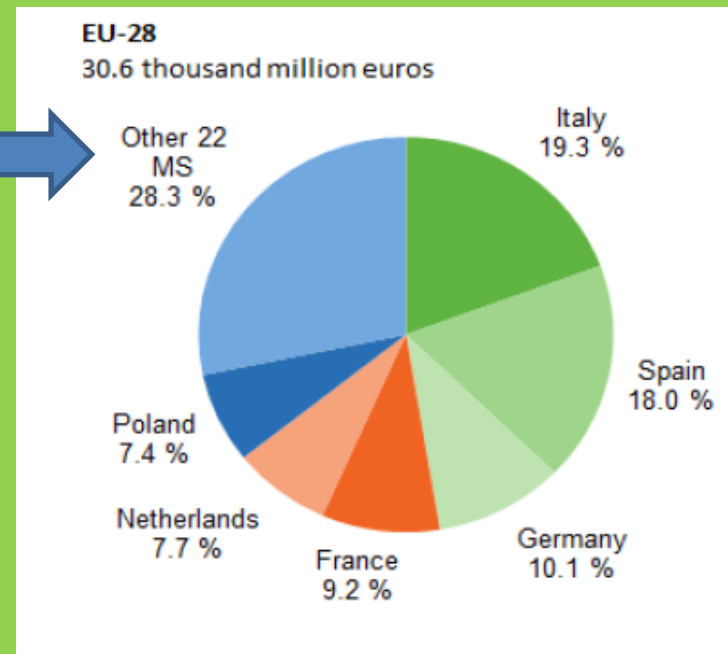
Fruit and vegetables in The Netherlands:

- 4.700 ha greenhouses (Tomatoes, cucumbers, sweet peppers)
- 91.000 ha fruit and vegetables in the open air
- 19.000 ha fruit, mainly apples and pears
- 70 ha mushrooms (Netherlands and Poland are main producers in EU)
- Fruit and vegetables are being marketed by 14 PO"s (almost 100%)

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Fruit and vegetables in The Netherlands:

- Production value € 2.9 billion
- Import value € 4.6 billion
 - From 107 countries
 - Spain number 1
- Export value € 13.9 billion
 - To 150 countries
 - Germany number 1

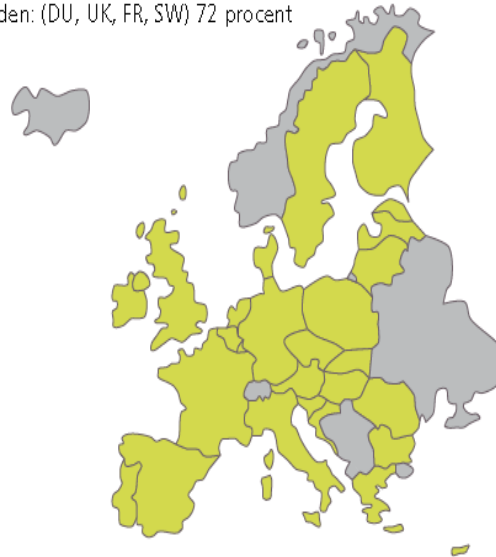


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Bron KCB

Totaal exportaandeel Nederlandse vruchtgroenten 85 procent
 Export Nederland naar vier landen: (DU, UK, FR, SW) 72 procent

Export NL → EU:



Export focuslanden 2005-2015² Cijfers in miljoen kilo; incl. re-export

Bron Contrade; Nederland bron KCB (=NL product)

Tomaat

	2004-06	2013-15	Toe/afname
Nederland	613	786	28%
Spanje	991	969	-2%
Marokko	208	471	126%
Polen	55	97	76%
Turkije	274	536	95%

Komkommer

	2004-06	2013-15	Toe/afname
Nederland	342	314	-8%
Spanje	400	581	45%
Marokko	4	8	100%
Polen	23	9	-61%
Turkije	37	84	127%

Paprika

	2004-06	2013-15	Toe/afname
Nederland	294	292	-1%
Spanje	442	662	50%
Marokko	35	97	177%
Polen	7	16	129%
Turkije	62	79	27%

Aubergine

	2004-06	2013-15	Toe/afname
Nederland	32	39	22%
Spanje	80	145	81%
Marokko	1	1	0%
Polen	0	2	+
Turkije	5	18	260%

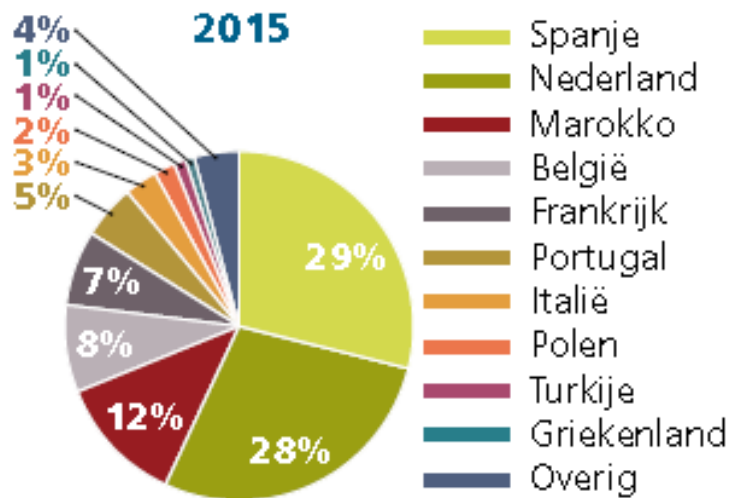
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Fruit and vegetables in The Netherlands:

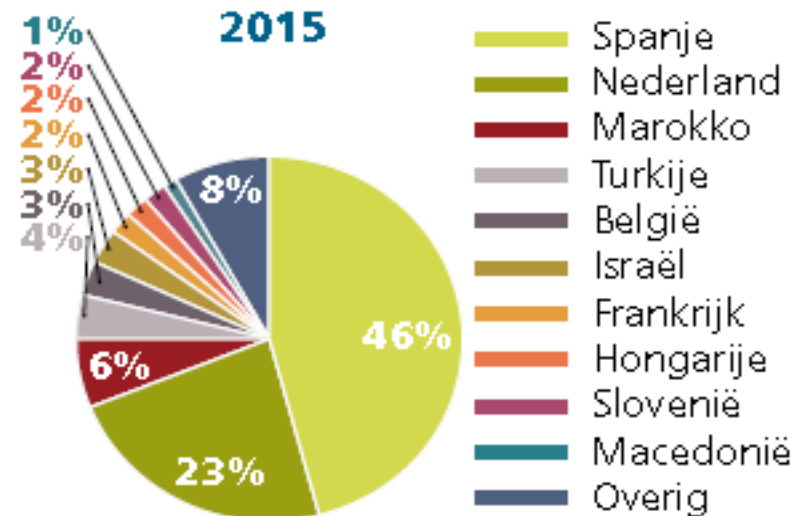
- The Netherlands is “world player” fruit and vegetables
- Second exporter of tomatoes in the world
- 75% of home production is being exported
 - Tomatoes, sweet peppers, cucumbers, apples
- 80% of imported vegetables and 70% of imported fruit are re-exported
- Logistic is key issue with Rotterdam as important harbour

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EU suppliers/competitors Tomato



EU supplier/competitors Sweet Peppers



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Distribution channels:

- From producer to supermarket
- From importer to exporter to supermarket

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Distribution from producer to supermarket:

- Producers are organised in PO's
- PO's are responsible for the sales of the produce of their members (sometimes also from non-members from abroad)
- PO's are selling directly to retailer/supermarket
- PO's are selling to wholesaler/exporter
- Wholesaler/exporter to retailer/supermarket

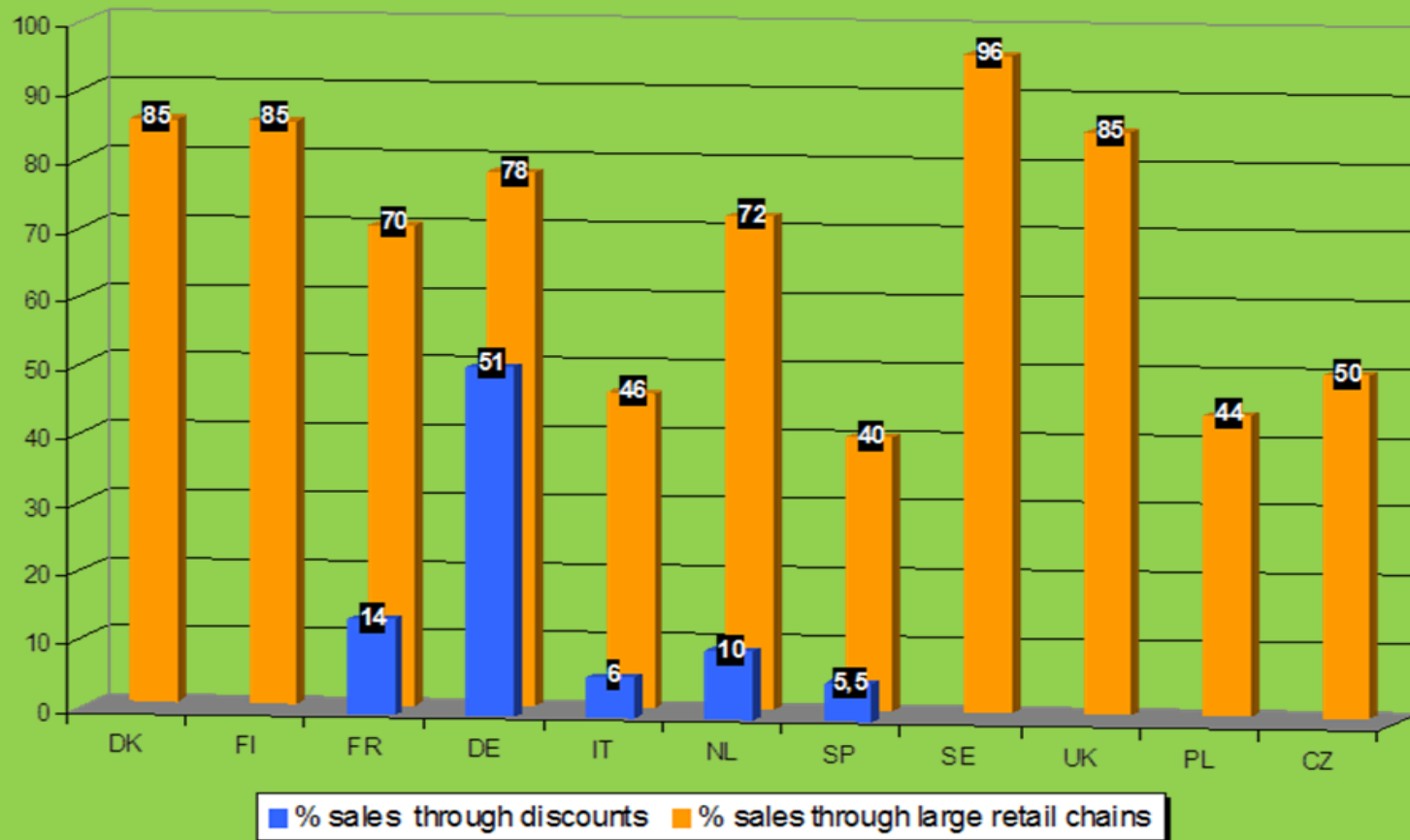
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Distribution fruit and vegetables:

- Wholesale markets are playing a very limitative role in The Netherlands in marketing fruit and vegetables
- Only Amsterdam and Rotterdam have wholesale markets
- In general all fruit and vegetables are sold directly or via wholesaler to retailer and supermarket

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Sales of fruit and vegetables by supermarkets



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Distribution fruit and vegetables:

Export/re-export:

- For export there are some 120 companies involved.
- They differ in size: the 10 largest exporters are exporting 50% of total export volume!
- Some are allround exporters trading in all fruit and vegetables
- Some are specialised in product and/or destination

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Distribution fruit and vegetables:

Import/re-export:

- There are some 130 importing companies
- 20 companies realise about 70% of import volume
- Importers are sometimes also exporters or wholesalers

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Example of importing/exporting company with specialities:

- BUD Holland (www.bud.nl)
 - Exotic fruit and vegetables
 - Specialities of fruits and vegetables
 - Nuts, seeds and super foods

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Example of exporting/wholesale company with specialities:

- Eminent Holland (www.eminentholland.com)
 - Exclusive greenhouse vegetables
 - Eminent Seeds for development special exclusive



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Distribution fruit and vegetables:

Wholesalers:

- There are some 450 wholesalers
- Most of the specialised companies have direct links to PO's
- The larger ones are operating on behalve of the supermarket chains
- In general they are logistic service supplier/distribution centre

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Distribution fruit and vegetables:

Conclusions:

- A wide range of importers and exporters with a large network of contacts
- Intensive competition on the European market
- Main suppliers are from EU with additional suppliers from abroad
- No specific suppliers for cities
- Possibilities for niche(?) products; traders are always in for new products
- One have to find the right importer for product and MS

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Competitors and positioning

- Price structure: free market so negotiating point supplier/importer/whole saler
- Timing: in winter time less EU produce on the market  higher prices
- Supply potential: during whole winter time/several years?
- Importers/re-exporters like stable trading relation  invest in relationship

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Competitors and positioning

- Attractive offers provided? In principle not. Part of negotiating deal
- Promotional activities: Is possible, however costs have to be bear by supplier
- Promotion and marketing are important tools in positioning the produce

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Competitors and positioning

- Consumer preferences: all consumers are different; food habits differ per MS
- Important knowledge role for importers/re-exporters
- Bio/ECO demand is increasing all over EU
- Bio/ECO from abroad is being questioned as sustainable
- Local for local gets more attractive

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Competitors and positioning

- Own brand: In general importers/whole salers/ retailers will like that as being high quality trade mark
- Risk: brand can be connected to political and/or social circumstances
- In over supplied market brand can make the difference. Many producers are working ont it

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Examples of niche marketing

- Looye tomato producers
- Family company headoffice

Naaldwijk

- Greenhouses The Netherlands and Spain
- No member PO; independent



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Examples of niche marketing

- Export sweet peppers to China
- Brand name: Dutch Valley
- Start this year
- Difficult market to get in
- Sweet pepper from spelected producers



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Thank you for your attention

