

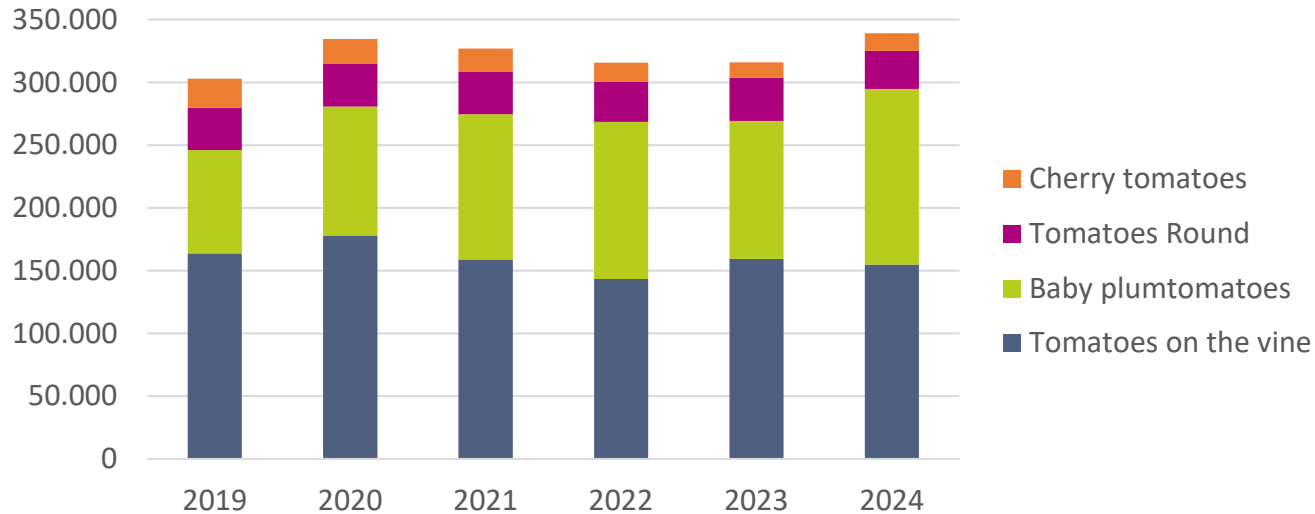
# Production and trade insights NL tomatoes - campaign 2025/26

October 2025



# German market: more than 50% requires “special”

Household sales tomatoes in Germany; volume in 1.000 kilo source  
YouGov



## Fresh tomatoes in NETHERLANDS

SUMMER PRODUCTION	2020	2021	2022	2022	2024	forecast 2025 (june)	forecast 2025 (oct)
Production fresh tomatoes (tonnes)	760.000	730.000	690.000	686.000	748.000	760.000	780.000
% organic	2%	2%	2%	2%	2%	2%	2%
% non-organic	98%	98%	98%	98%	98%	98%	98%
% greenhouse	100%	100%	100%	100%	100%	100%	100%
% open field	0%	0%	0%	0%	0%	0%	0%
%Round tomatoes	11%	10%	13%	13%	13%	15%	15%
%Vine tomatoes	73%	74%	70%	73%	72%	65%	65%
%Other tomatoes (cherry, mini-type...)	16%	16%	17%	14%	15%	20%	20%
% destined to national market	9%	9%	9%	9%	10%	10%	10%
% destined to exports EU	74%	74%	74%	74%	74%	74%	73%
% destined to exports non-EU	17%	17%	17%	17%	16%	16%	17%
Surface fresh tomatoes (ha)	1.870	1.850	1.815	1.771	1.726	1.800	1.900
% organic	2%	2%	2%	2%	2%	2%	2%
% non-organic	98%	98%	98%	98%	98%	98%	98%
% greenhouse	100%	100%	100%	100%	100%	100%	100%
% open field	0%	0%	0%	0%	0%	0%	0%
%Round tomatoes		11%	11%	13%	14%	17%	17%
%Vine tomatoes		59%	60%	63%	59%	53%	53%
%Other tomatoes (cherry, mini-type...)		30%	29%	24%	27%	30%	30%
% destined to national market	9%	9%	9%	9%	10%		
% destined to exports EU	74%	74%	74%	74%	74%		
% destined to exports non-EU	17%	17%	17%	17%	16%		

910.000      890.000      770.000      726.000      828.000      880.000

WINTER PRODUCTION	2019/20	2020/21	2021/22	2022/23	2023/2024	2024/2025	2025/2026 (forecast)
Production fresh tomatoes (tonnes)	150.000	160.000	80.000	40.000	80.000	120.000	200.000
% organic	0%	0%	0%	0%	0%	0%	0%
% non-organic	100%	100%	100%	100%	100%	100%	100%
% greenhouse	100%	100%	100%	100%	100%	100%	100%
% open field	0%	0%	0%	0%	0%	0%	0%
%Round tomatoes	2%	3%	1%	1%	0%	0%	0%
%Vine tomatoes	40%	63%	65%	28%	70%	75%	80%
%Other tomatoes (cherry, mini-type...)	58%	34%	34%	71%	30%	25%	20%
% destined to national market							
% destined to exports EU							
% destined to exports non-EU							
Surface fresh tomatoes (ha)	750	825	450	200	500	700	800
% organic	0%	0%	0%	0%	0%	0%	0%
% non-organic	100%	100%	100%	100%	100%	100%	100%

\* 1800—> 1900 ha capacity

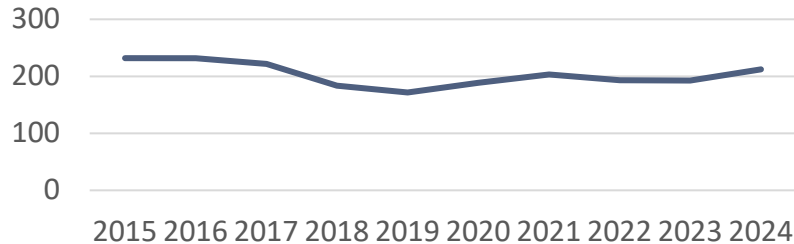
\* winterproduction: >80 %  
tomato on the vine>47 mm

\* yields up to > 100kg/m2

# UK production

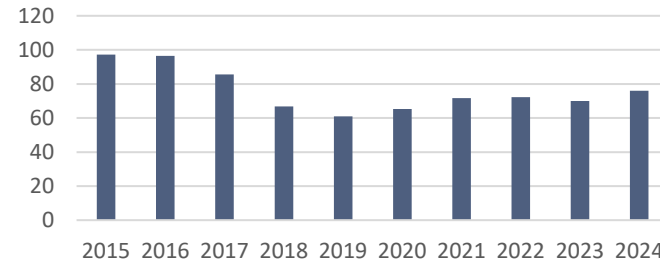
Area of tomatoes in UK; in hectares

source DEFRA



Production of tomatoes in UK; in million kilo

source DEFRA



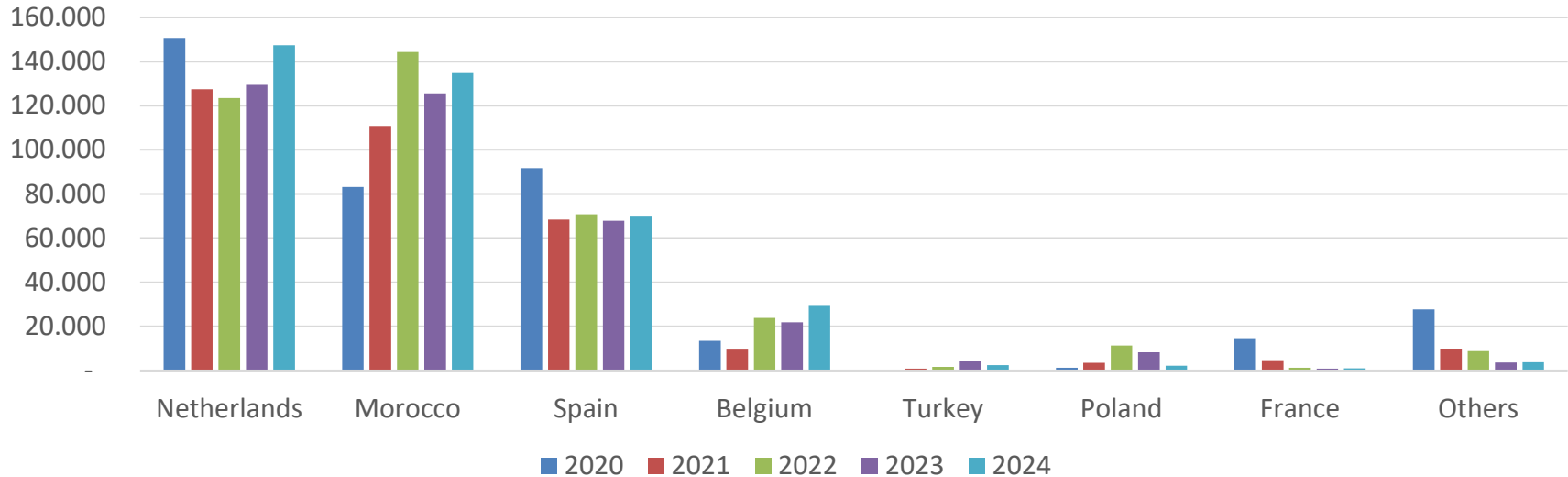
Same challenges as in NW- Europe: raising costs, struggling with seasonal aspects  
 TOBRFV=Q, 76 mio kg/212 ha = 36 kg/m<sup>2</sup> (BE: 40, NL: 50)

# UK Import



## Import of tomatoes in United Kingdom

source Comtrade/Fresh Produce Centre





# Balance UK

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Home Production Marketed (HPM)	97,2	96,5	85,5	66,9	60,9	65,3	71,7	72,1	70,0	76,0
Imports	402,3	402,5	398,3	410,9	409,1	382,7	334,8	385,3	368,6	395,9
Exports	4,7	4,2	4,7	4,8	4,5	3,6	2,1	1,7	1,0	1,0
Total Supply:	494,8	494,8	479,1	473,0	465,5	444,4	404,5	455,8	437,6	470,9
HPM as % of Total Supply	19,7	19,5	17,8	14,1	13,1	14,7	17,7	15,8	16,0	16,1

**2021 and 2023 drop in imports, overall stable consumption....**

# EU-27 tomato import from Turkey

EU-import of tomatoes from Turkey, in 1.000 kilo  
source Comtrade/Fresh Produce Centre



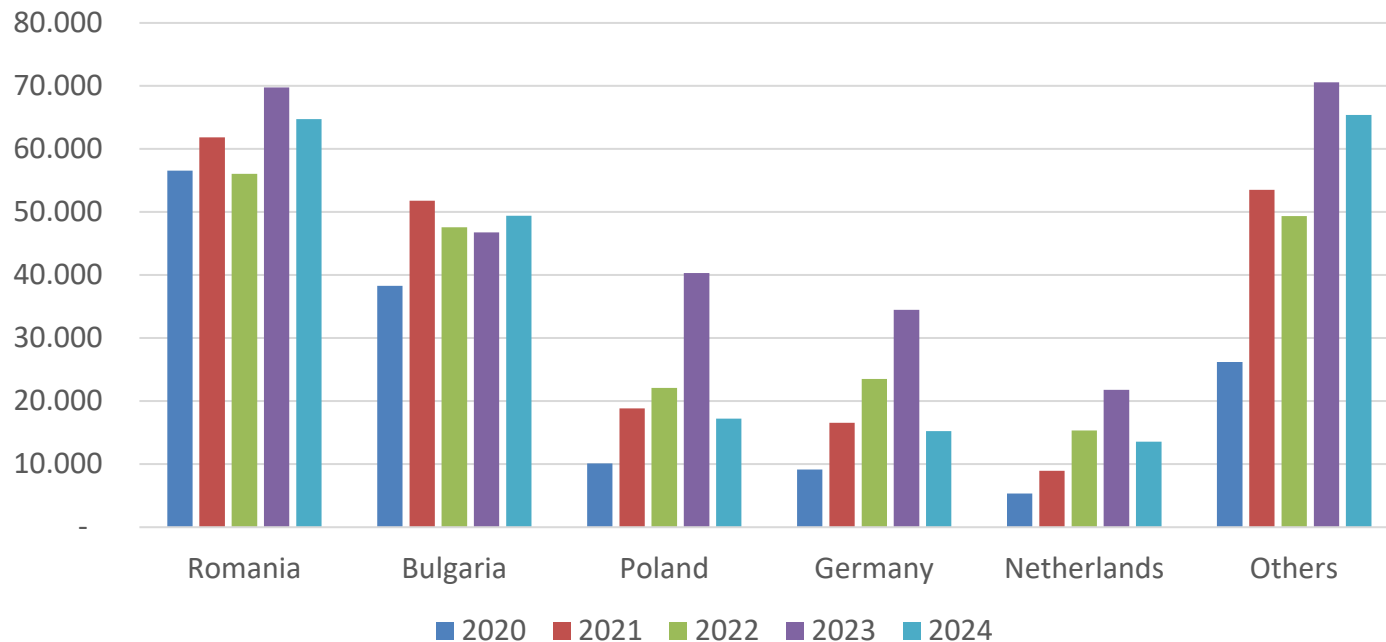
**2022: 213.000; 2023: 283.000; 2024: 225.000**

**Decline in glasgreenhouses, decline in plastic greenhouses and decline in surface tunnels**

# Major EU countries with tomato import from Turkey

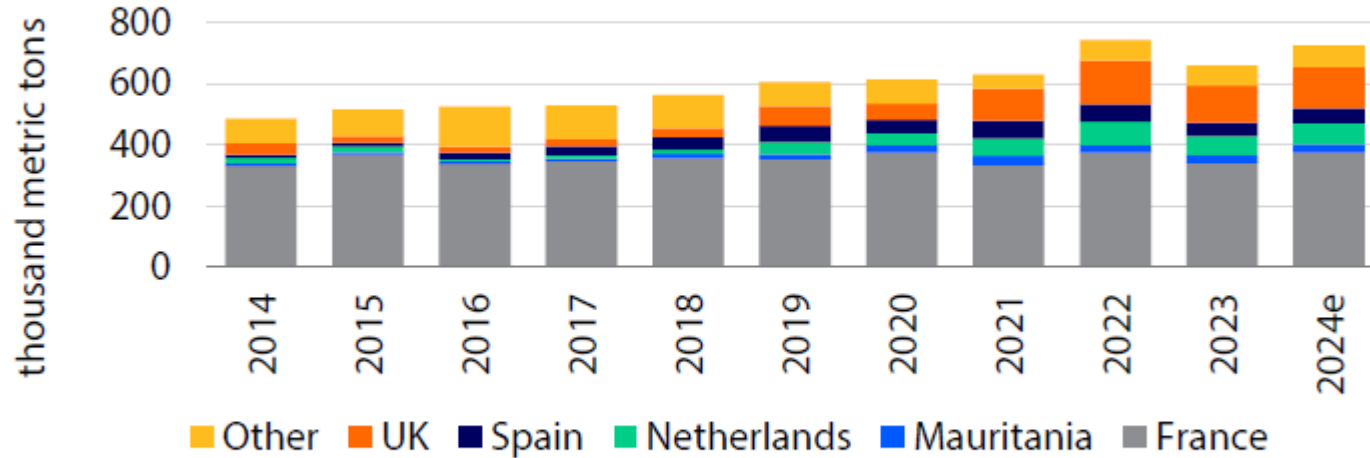


EU-import tomatoes from Turkey; in 1.000 kilo  
source Comtrade/Fresh Produce Centre



Source: UN Comtrade, RaboResearch 2025

Figure 31: Morocco's tomato exports, 2014-2024e



Source: UN Comtrade, RaboResearch 2025

**Rabobank**

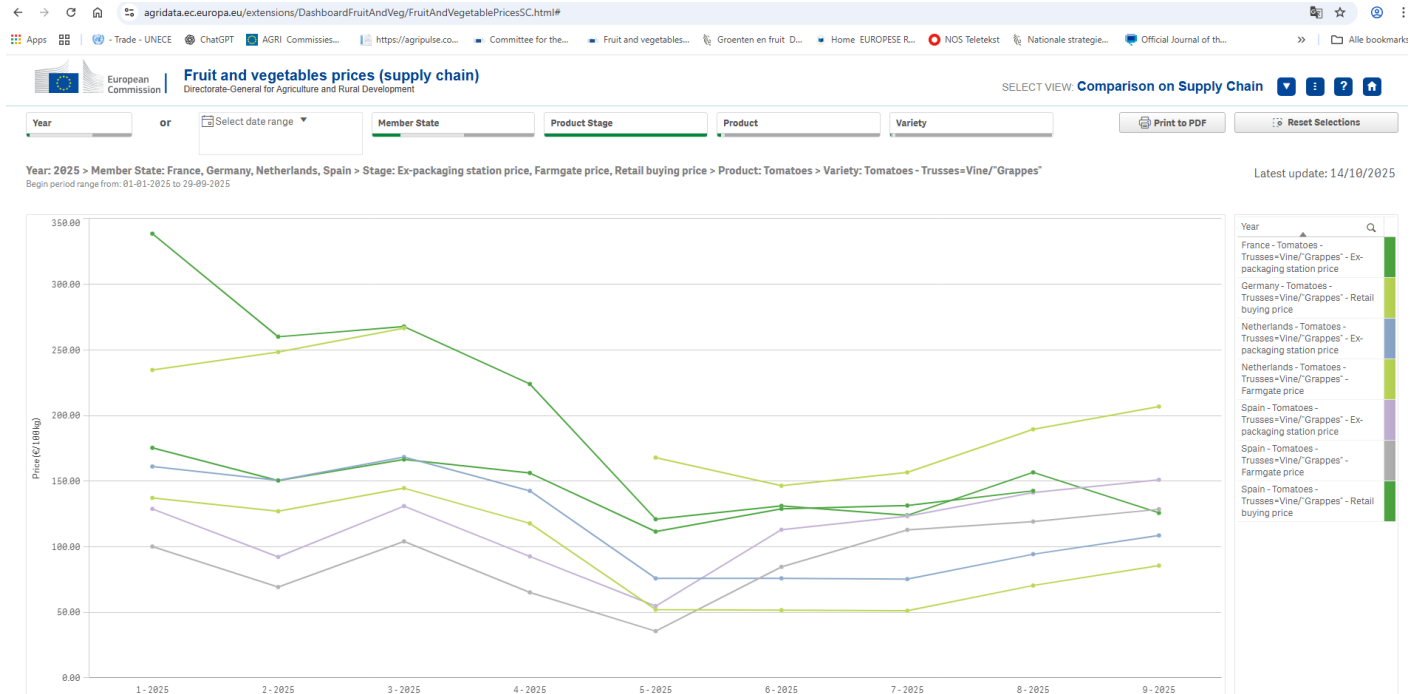
**Rather stable position France in volume**  
**Products as paprika, cucumber are gaining volumes**

# Summary Market observations

- UK: July 1st 2025 .....back on EU track.... Still some hurdles to take
- To many quality schemes, sector is working on PEF-CR
- Costprices is depending on the level of “tech”: high tech has a complete different costprice than plastic greenhouse, than tunnels, than openfield. However, only class I is accepted in the EU market. Not every “tech” is suitable to produce 12 months/yr.
- NW- European production costs very high, segment “special” is getting smaller due to:
  - high labour costs
  - well paid > 47 mm tomatoes the last years and this species more able to withstand diseases and viruses (risk is more high)
- Retailprices still not published by the EC. Retailers use “our” information in the buying proces: UTP ?



# Tomato vine/grapas chain approach: retail prices selling prices are missing



# 2025 Tomato sector developments NL

- Good income leads to investments in sustainable production, eg. solarpanels, electric boilers, batteries etc.
- Energy management is most important skill for the producer after skills for the production of tomatoes
- Very unclear Dutch policy on Energy /tax developments (ETS-2)
- Dutch wages in greenhouses above 25 euro per hour (total costs incl all taxes etc.)
- Dutch members of NL PO's expanding capacity to produce “special tomatoes” in N-Africa to obtain a yearround position in the NW-European retail
- Average size per producer 9ha; 10 producers over 50% of the total acreage in NL



Thank you for your attention

