



# **Strawberries in the Netherlands and Belgium**

**Ad Klaassen, Secretary-General**

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# 1. INTRODUCTION



# World production

	Origin	Volume (1000T)
1	US	1.133
2	Spain	333
3	Russia	230
4	Turkey	211
	...	...
	Korea	203
	Japan	193
	Mexico	176
	Egypt	174
	Morocco	100
	...	...
15	Netherlands	43
	...	...
18	Belgium	40
	...	...

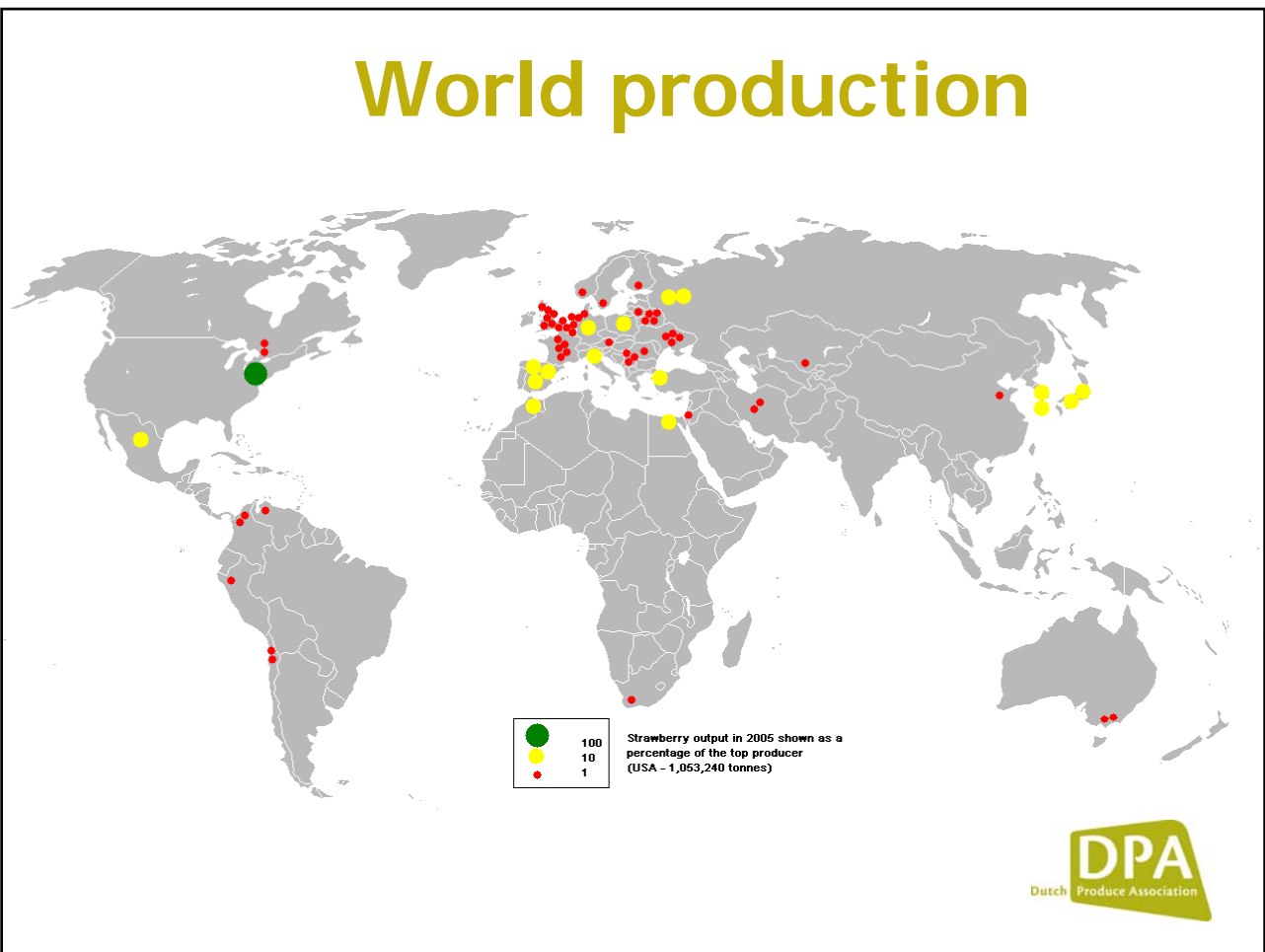
**Total world: 3.813 (T x 1000)**

\* FAOstat 2007

\*Faostat 2007

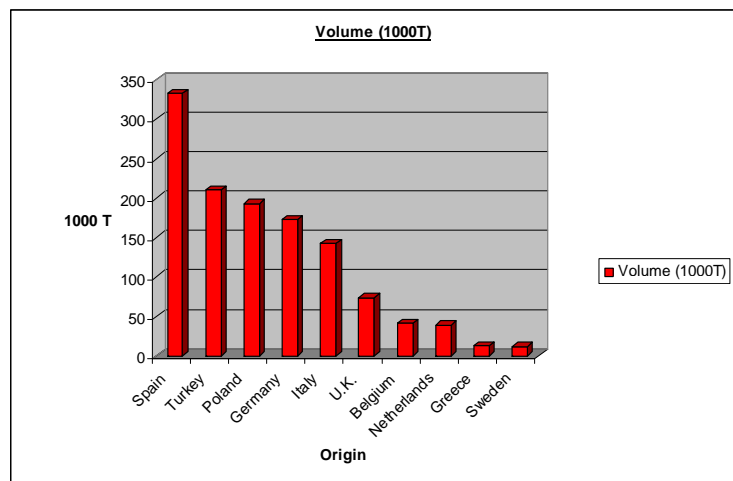


# World production



# Production in Europe

Origin	Volume (1000T)
Spain	333
Turkey	211
Poland	193
Germany	173
Italy	143
U.K.	74
Belgium	41
Netherlands	39
Greece	13
Sweden	12
	1232



\* Eurostat



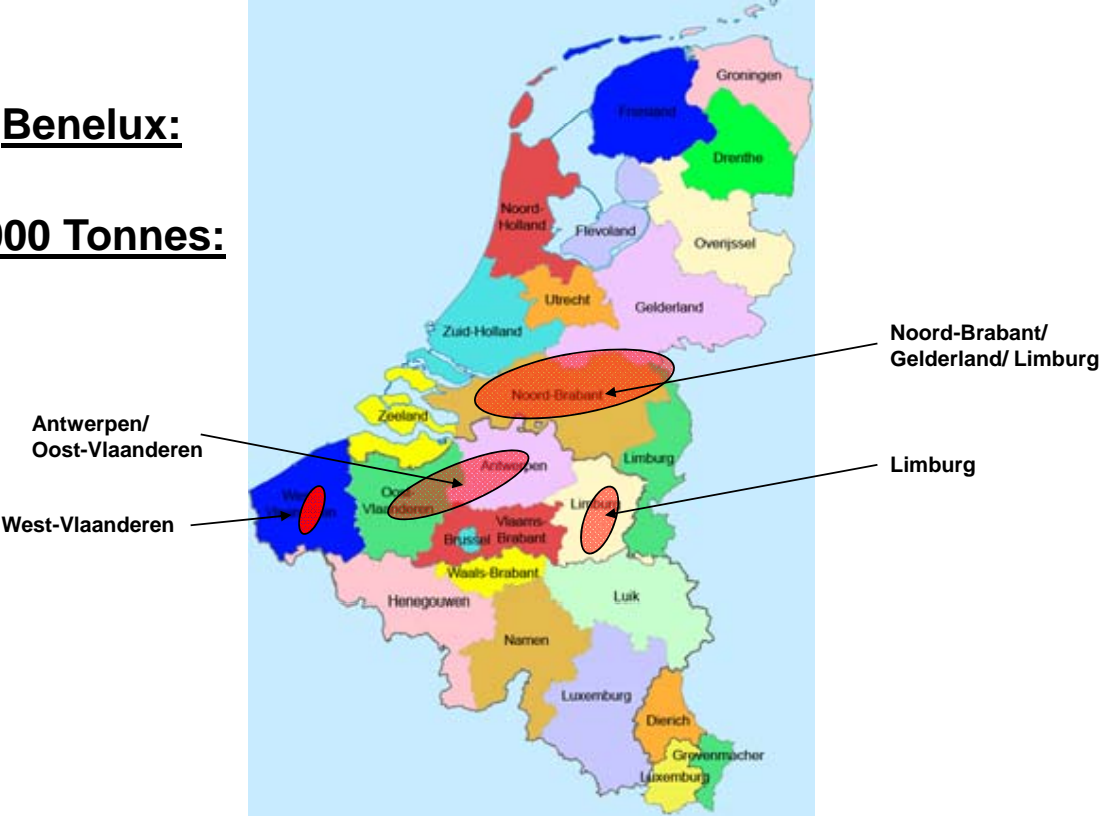
## 2. PRODUCTION BELGIUM / THE NETHERLANDS



# Production BENELUX

Benelux:

80.000 Tonnes:



# Production of strawberries (ha)

	Netherlands			Belgium
Year	Open field	Glass	Total	Total
1998	1.357	170	1.527	2.733
1999	1.285	170	1.455	2.750
2000	1.204	180	1.384	2.471
2001	1.188	180	1.368	2.043
2002	1.200	189	1.389	2.030
2003	1.250	200	1.450	1.950
2004	1.350	210	1.560	1.900
2005	1.375	225	1.600	1.900
2006	1.457	245	1.702	1.700
2007	1.436	265	1.701	1.700
2008	1.350	269	1.619	1.550
2009	1.360	275	1.635	1.549

Netherlands:  
- small growth  
-More glasshouse production

-Belgium:  
- decrease

Source: PT/VBT



# Production of strawberries (tonnes)

	The Netherlands	Belgium
Year	Total	Total
1998	37.700	48.000
1999	36.500	39.500
2000	38.000	42.900
2001	34.000	41.300
2002	35.000	40.000
2003	33.000	41.000
2004	36.500	44.000
2005	39.000	42.000
2006	40.000	40.500
2007	43.000	41.000
2008	42.000	37.400
2009	43.000	33.000

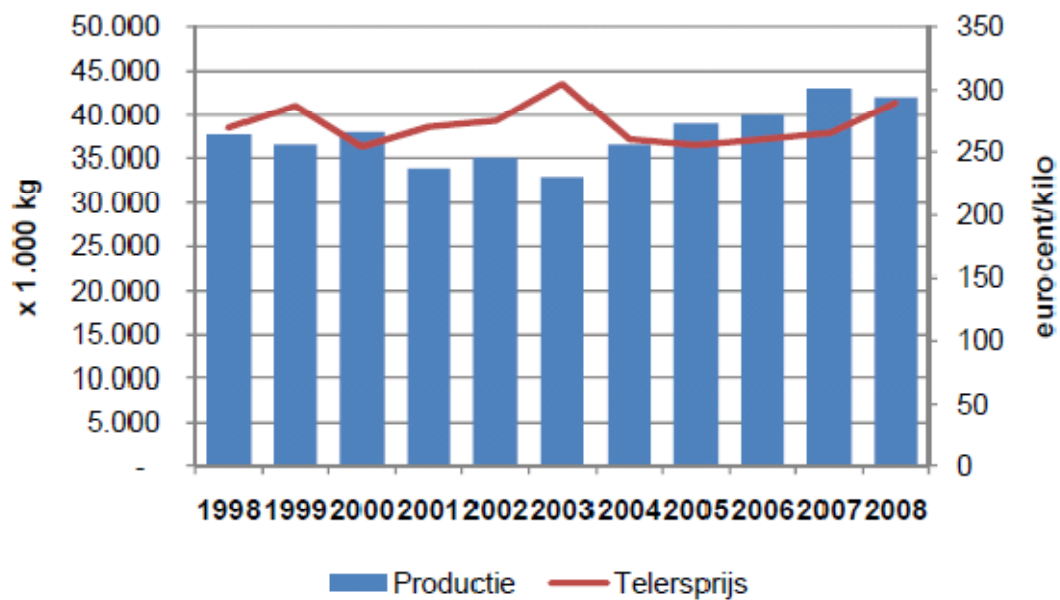
Netherlands:  
- small growth

-Belgium:  
- decrease

Source: PT/VBT



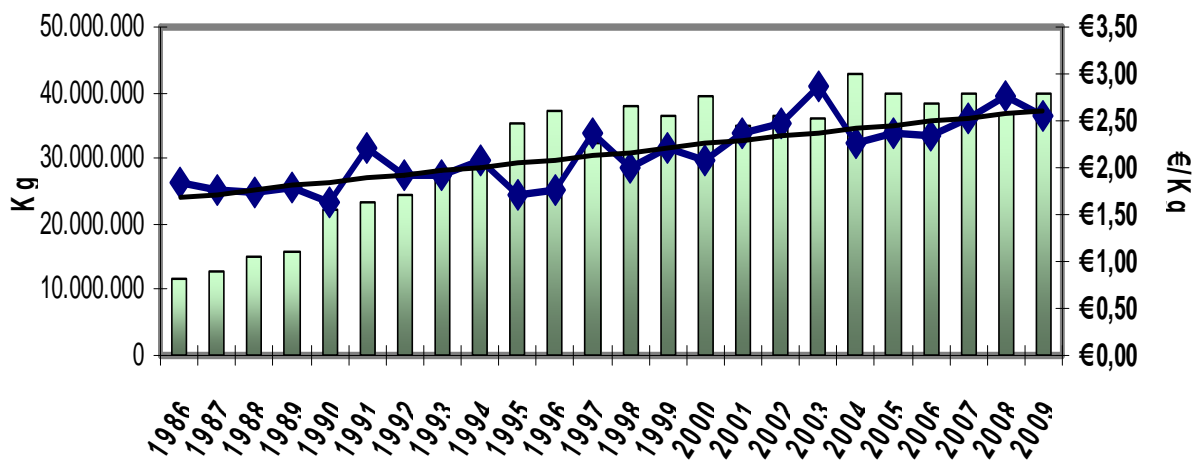
# Production and prices in the Netherlands



Source: PT



# Production and prices in Belgium



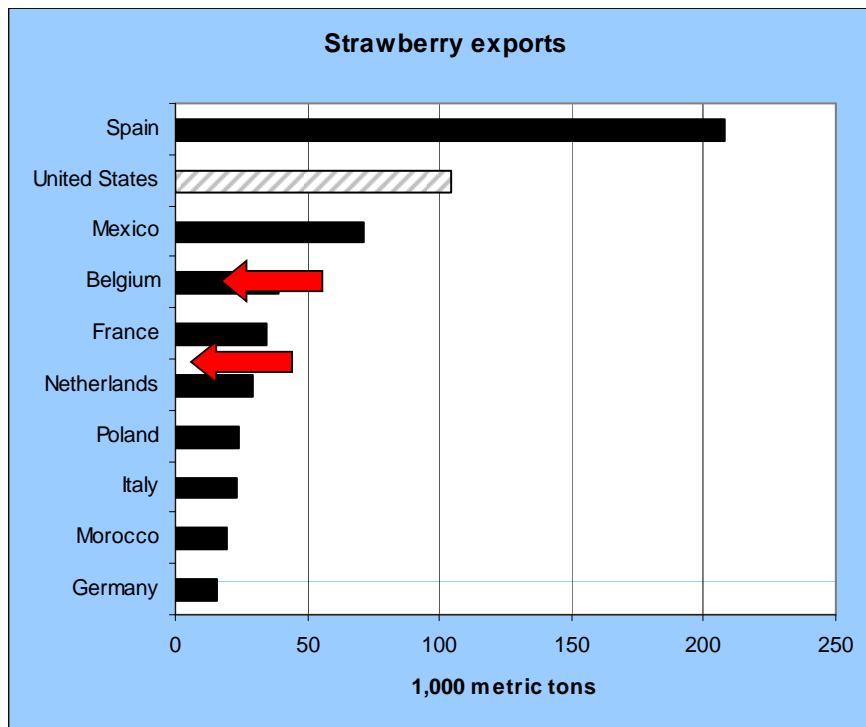
Source: VBT



## 3. MARKET



# World export



\*: USDA, Animal and Plant Health Inspection Service (2006)



# Export

## The Netherlands

- 50% export
- Main export countries:
  - Belgium (Zundert -> Hoogstraten)
  - UK
  - Germany
  - Ireland

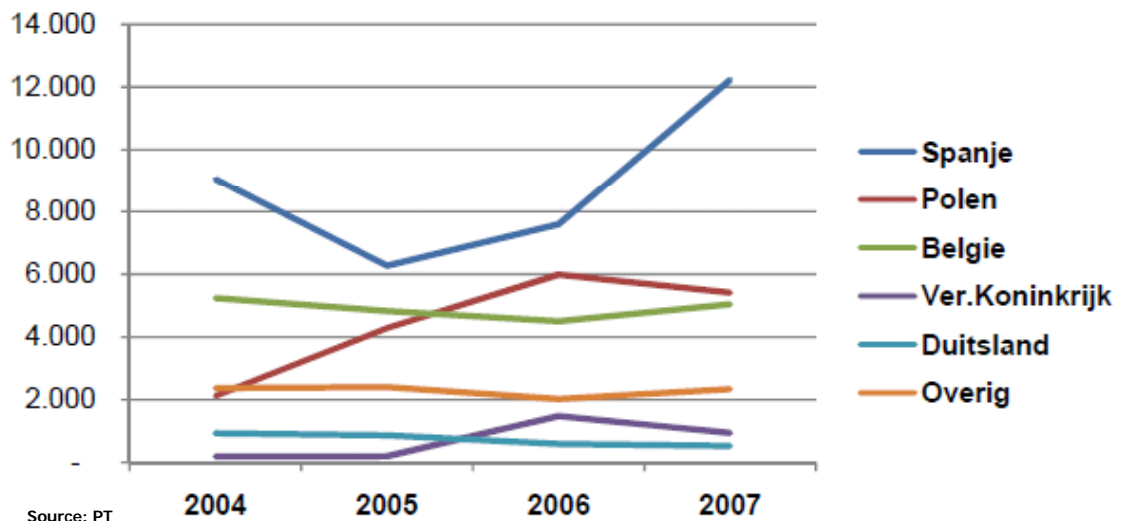
## Belgium

- 50% export
- Main export countries:
  - France
  - the Netherlands
  - Germany
  - Sweden



# Import

## Into the Netherlands 2004-2007



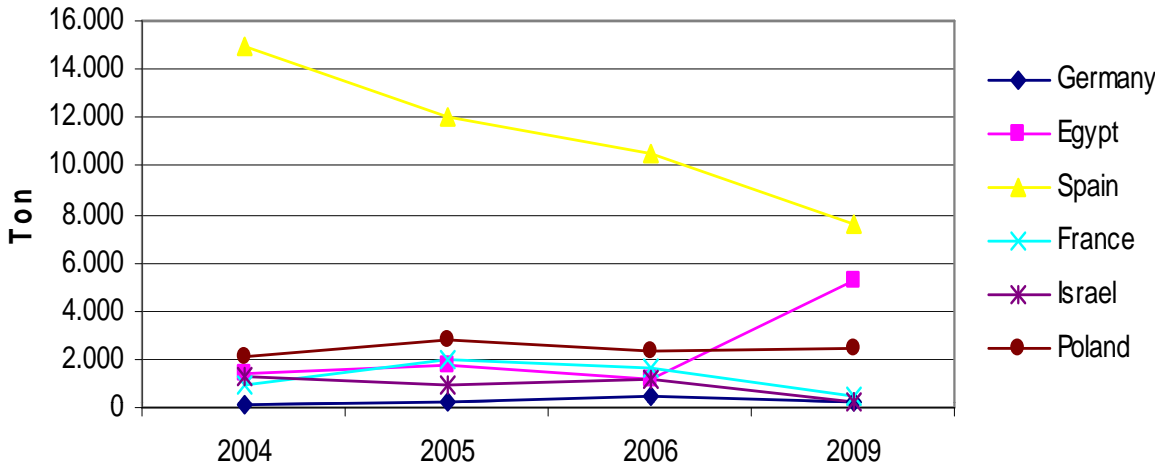
Source: PT

Growth from 20.000 to 26.000



# Import

## Into Belgium 2004-2009



Source: NBB



# Marketing

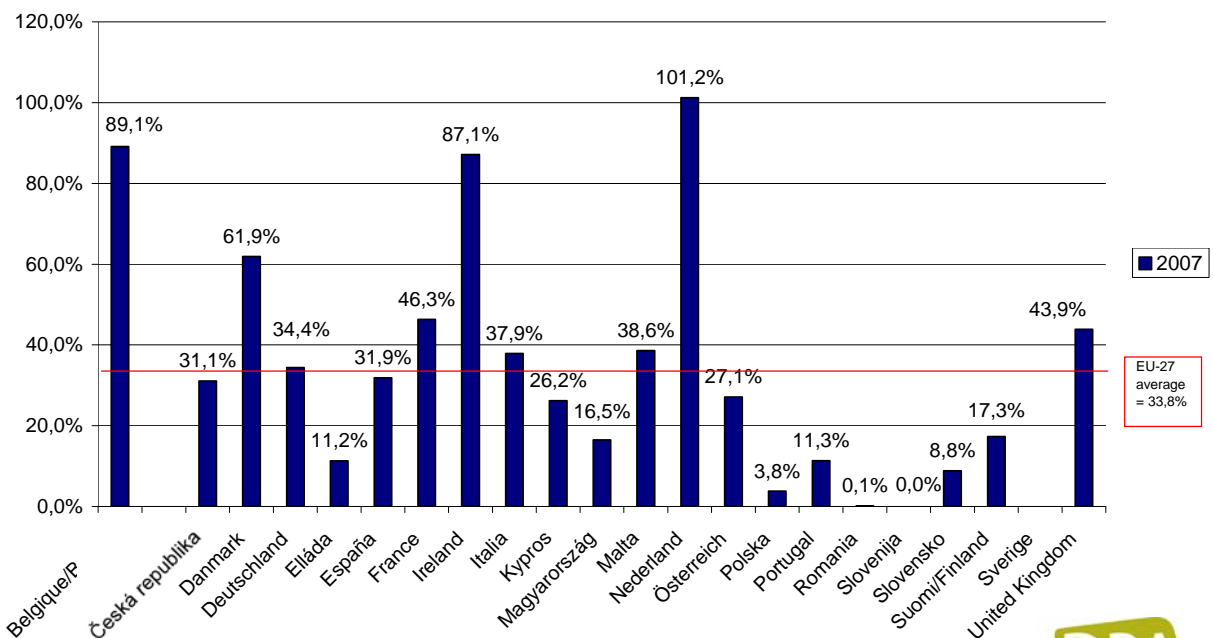
- Strong position for PO's
- Sale via auction clock (Belgium)
- Direct sales (the Netherlands) →
- Limited number of suppliers
- Direct contact with retail
- Shorter chain



→ Direct sales (the Netherlands)



# Organization rate of POs, APOs and PGs by Member State in 2006



Source: European Commission – DG Agriculture and Rural Development



## 4. CONSUMPTION



# Consumption Purchase in the Netherlands

Per chain: (2009)	Supermarket	65%
	Market	18%
	Greengrocer	9%
	Other	8%

Retail turnover	2006 55,8 mln € }	
	2007 61,1 mln € }	+ 14%
	2008 69,7 mln € }	



## Consumption Purchase in the Netherlands

Per retailer: (2009)	Albert Heijn	38%
	Super Unie	33%
	C1000	11%
	Aldi	7%
	Super de Boer	6%
	Lidl	4%



## Consumption Purchase in Belgium (2009)

Dis 1	40,3%
Dis 2	10,1%
Dis 3	11,1%
Market + greengrocer	36,2%
Other	2,3%

Dis 1	Carrefour, GB, Delhaize, Colruyt, Makro, Cora, Math, Champion
Dis 2	Aldi, Lidl
Dis 3	Local shop



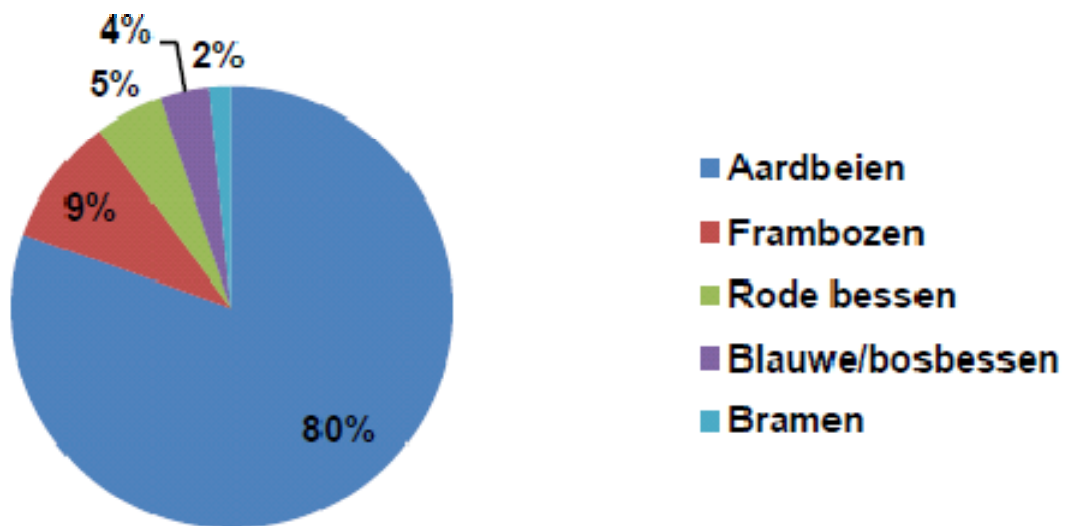
Source: GfK PanelServices Benelux for VLAM

## Purchase of strawberries 2009

	<b>Belgium</b>	<b>Netherlands</b>
% of households that buy	70,8%	73,0%
Kg bought per household	2,73	2,78
Expenditure per household	€ 13,46	€ 11,57
Average price	€ 4,93	€ 4,16



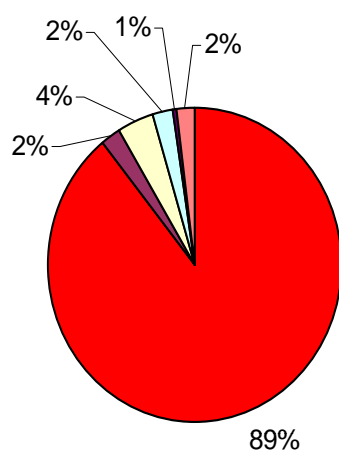
## Purchase of strawberries in the Netherlands



Source: PT



# Market share of strawberries in Belgium (2009)

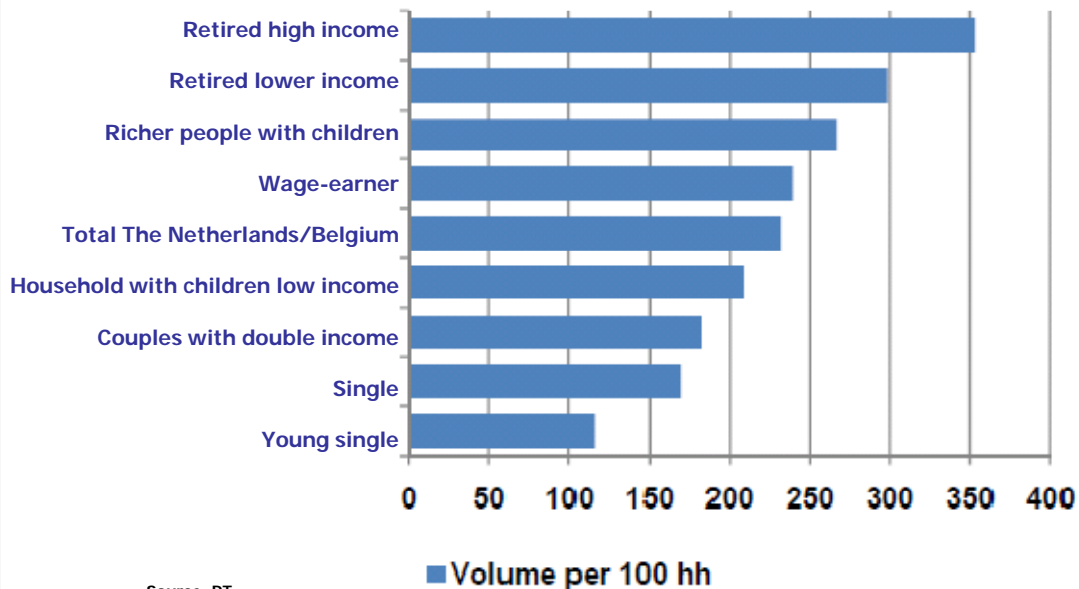


- AARDBEIEN
- FRAMBOZEN
- TROSBESSEN (RODE/WIT/ZWART)
- BLAUWE BOSBESSEN
- BRAAMBESSEN
- VEENBESSEN

Source: GfK PanelServices Benelux for VLAM



# Purchase of strawberries in kilos per 100 households per lifecycle



Source: PT



## 5. Sustainable production



## and strawberries .....???



# Retailer reaction

## Netherlands

- Maximaal 50% MRL norm
- Maximaal de ARfD per actieve stof
- Afh. van het product wordt een max. gesteld.
- Stoffen op de zwarte lijst worden geweerd.

**JUMBO**  
supermarkten



• 50% MRL



- Maximaal 33% MRL norm
- Maximaal de ARfD per actieve stof, som < 100%

**PLUS** • 70% MRL

- Maximaal aantal werkzame stoffen per gewasgroep (3,4,5)
- 70% per act. stof en Max. 80% som MRL's
- Maximaal 80% som ARfD's



## Germany



- Maximaal 33% MRL norm
- Maximaal de ARfD per actieve stof, som < 100%
- (Kaufland) laagste telt: EU of oudste Duitse norm



- Maximaal 70% MRL per actieve stof
- Maximaal de ARfD per actieve stof

**REWE**

**NORMA**

- Maximaal 5 werkzame stoffen
- Maximaal 80% som MRL's
- Maximaal 80% som ARfD's

- Maximaal 70% MRL
- Maximaal 70% som ARfD's
- Maximaal aant. werkz. st. per gewasgroep (3,4,5)



- Maximaal aantal werkzame stoffen per gewasgroep (3,4,5)
- 70% per act. stof en Max. 80% som MRL's
- Maximaal 80% som ARfD's



- 70% MRL
- 50% Gärtners Beste

**KAISER'S TENGELMANN**

- 70% MRL per stof
- < 100% ARfD per stof
- Maximaal aantal werkzame stoffen in de toekomst verminderen

August 2010



## Reaction of growers

- Reduction of use chemicals
- Modern new chemicals
- Less harmful for the environment
- Requirements of retail some times go too far e.g. Aldi
- Residue free production: no reaction from the market
- GLOBALGAP certification



## Closing remarks

- Production stable
- High quality
- Marketing via POs
- Older consumers
- Sustainable production

