

PAUL M. MÜLLER

SEIT 1956

# FOOD NEWS

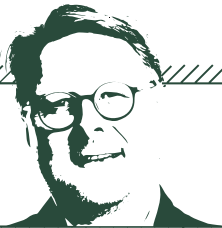
## MARKET REPORT

MARCH 2023 ISSUE

23. 03. 2023

*„Transformation is necessary like the renewal of leaves  
in spring.“*

Vincent van Gogh (1853 – 1890)



*Dosed – our column*

## Spring Awakening

Everything is new in spring, which officially began on March 20. It tickles nature out of its winter sleep. The days are getting longer, the nights shorter, life awakens and brings a lot of beauty. We love the roller coaster of life, the highs, but also the lows that challenge us and make us grow. This new power can also be felt in the food industry: people are increasingly coming together again at trade fairs, are hungry for news, and the propensity of consume is on the rise. Star cuisine is also bursting with new ideas, as our exciting interview with chef Joshua Leise shows.

In the case of tomatoes, pineapple and tuna, changes mean one thing above all: higher raw material prices. Read more about the background and forecasts in this market report. In these challenging times, we're doing everything we can to provide you with reliable support - and we're changing, too. We are growing and taking the next steps needed to

remain successful as a family business. For example, with the two new hires of Vincenz Herrmann and Isabella Di Pinto. They not only enrich our daily business with their expertise, but also our team with their personality. Further below you will find a crisp interview with logistics expert Isabella. We will introduce Vincenz to you in the next report. Another big (and above all incredibly delicious!) change at PMM is PAOLO ROSSI - now also with its own website and Instagram channel.

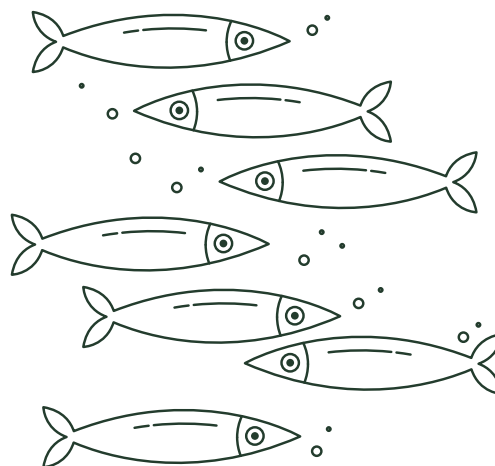
In this sense: Do as spring does, be open to change and enjoy life - and of course the Easter days.

Thomas Schneidawind

## New Season

### Anchovies: Small and precious

Currently, it takes at least twice as long as usual to complete a container load of anchovies – more than a week instead of three days. The main reason for this is the small to very small size of the fish, which even industry experts cannot explain. As a result, more workers are needed in the factories to process the same amount of catch. At the same time, the generation of employees is proving difficult. That's why everyone involved has been hoping for greater freshness since January. However, insiders are skeptical that this wish will be fulfilled in April.

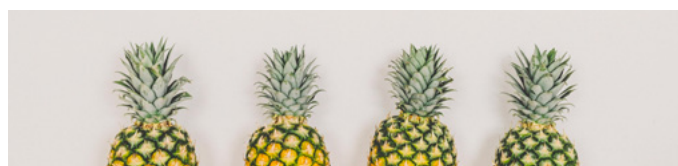


### Pineapples: Poor harvest

The February 2023 crop was worse than expected, causing raw prices to rise to 8.00-8.30 Thai Baht/kg. However, despite international trade shows such as Prodexpo and Gulfood, sales in the country of origin are well below packers' expectations. Demand for canned pineapple, especially in the US and Middle East, are very low. The EU and Russia are also not drawing their usual volumes, so packers are scaling down production capacity. In addition, Thailand is expected to see further increases in raw material prices due to declining raw material volumes in the coming months. So it remains exciting how prices will develop due

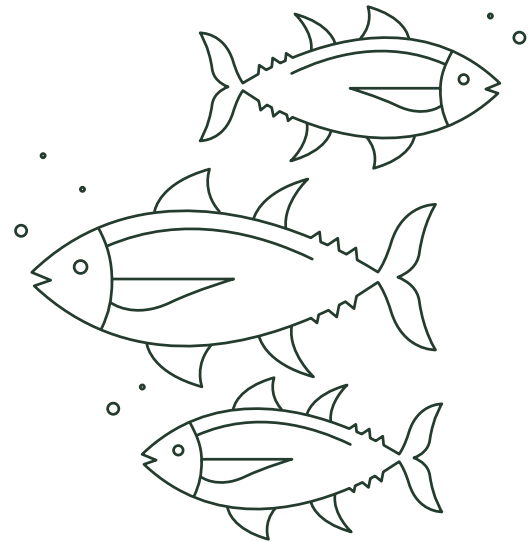
to these facts in terms of supply and demand.

By the way, have you seen our [Exclusive commodity guide on pineapple?](#) It is part of the [PMM College](#) und contains exciting know-how.

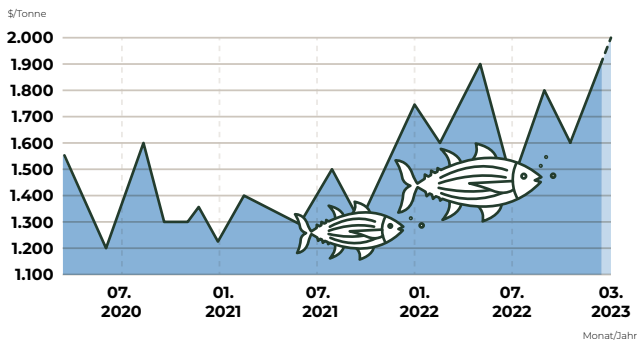


# Tuna: Peak prices in sight

Negotiations for the raw material price of tuna are currently in full swing. Exact figures are only valid for the moment. Even experts we have spoken to do not dare to make forecasts for the next few months. But one thing is certain: the trend will continue to be (moderately) upward over the next two to three months - regardless of whether it's the Pacific, Atlantic or Mediterranean.



**Preisentwicklung  
ganzer Thunfisch Skipjack (1,8 kg), Bangkok**



Recherche: Paul M. Müller

In addition to the FAD bans on tuna fishing in the Atlantic from January to March and in the Western Pacific from July to September, other factors are also causing a reduced supply and price increases. These are, on the one hand, the dwindling fish stocks and, on the other hand, phased work strikes on the fishing boats, which bring them to a standstill. At the same time, the reduced supply of raw material is being met with increased demand for processed tuna products.

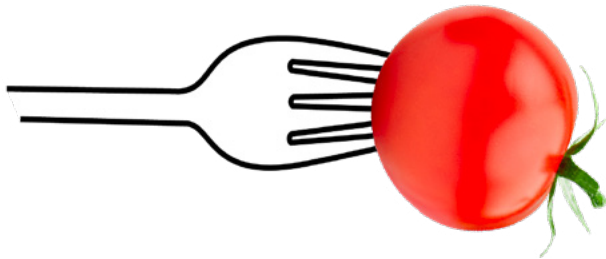
There is currently no perfect time to buy tuna. Our tuna expert Eve-Florence Gölz will always help you with questions or order requests.



Record skipjack prices above USD 2,000 per ton are expected soon for the Bangkok free trade area. A look at the graph with the price development shows it clearly: We are dealing with a new high of the last years. Analogously, the prices for yellowfin tuna, which we use for example for our ADRIA Premium brand solid pack are rising.

# Tomatoes: Hot negotiations

From the last market report described „Tomato Poker“ the first raw material prices for the 2023 harvest are now known. Compared to the previous year, price increases of 28 percent (in the USA) to 50 percent (in Spain) are expected for raw materials, depending on the country of cultivation. Insiders told us that price negotiations are still ongoing in Italy, but raw material prices are likely to converge with those in Spain and Portugal. In southern Italy, they estimate that prices are likely to be as much as 10 to 20 euros per ton higher than in the north of the country. In addition, there are the freight costs from Puglia to Naples/Salerno. Due to the long distance, these are more than twice as high as in northern Italy.



After drought and water shortages have made 2022 a difficult and turbulent year for tomatoes, other more heat-resistant crops are increasingly playing a role for farmers (especially in southern Europe, but also worldwide). One of our interlocutors from Italy is already reporting a lack of water in the country as well as in Italy's largest river - the Po - at the beginning of the year. Even though the tomato harvest is still several months away, the mood among growers is tense due to the lack of water and the current price negotiations.

But what does this mean for our market in Germany? Due to the high prices for the raw material as well as the persistently high energy prices, manufacturers will continue to try to produce low-concentration products such as pulp and pizza sauce. After all, 1 kg of tomato paste requires 6 kg of fresh tomatoes as well as a lot of energy during processing. It is therefore hardly surprising that, according to our two interlocutors, tomato paste in all container sizes is already almost sold out in Italy. Things look better with pizza tomatoes as well as strained tomatoes in bottles for the retail trade. Paul M. Müller's warehouses are still well stocked for you. More background information on the current tomato situation was provided in the [Tuesday Talk on February 28](#).

As far as packaging is concerned, there is no detailed information available at the present time. However, experts assume that the prices for can sheet will remain constant - barring unforeseen events. Prices for glass have also eased considerably at present. However, there may also be changes here until the hot harvesting phase from July to September.

By the way: You will find a lot of tomato know-how (also about different tomato products) in our new [Tomaten-College](#).

# Maple syrup: Harvest kick-off

Sweet, subtly caramel-like, thick and golden to amber in color - maple syrup is all of these things. In breakfast and hotel catering, it is a popular accompaniment to pancakes or a vegan alternative to honey in the kitchen as well as at the buffet. 80 percent of the world's maple syrup comes from Canada - no wonder that a maple leaf is the country's national symbol and even adorns the Canadian flag.

rather colorless maple water is harvested and processed into syrup within 24 hours. How this works and with which other maple products you can sweeten the dishes for your guests, you can read in our [new glossary article about maple syrup](#). Just this much in advance: Maple syrup can also be crunchy or creamy.

Or you can ask our Paul M. Müller expert for maple products: Eduard Kekel.

Here you will find a recipe inspiration from us: [Fruit salad with coconut-maple crunch](#).



# INTERVIEW



Photo: Lenka Li Lilling

*„More and more people are thinking sustainably and want to eat a plant-based diet. I can't imagine that going away. We, at least, are planning on vegan menus for the next few years as well.“*

Joshua Leise

**Even star cuisine can be vegan. But what counts above all are new ideas and creativity. What the young creators of the Mural in Munich chef Joshua Leise tells Paul M. Müller (PMM) in an exclusive interview. Surprises are in store. We wish you bon appétit!**

**Mr. Leise, as a star chef, how did you come to vegan cuisine?**

I think the time is ripe for it and the demand is there. Until now, we always had a „normal“ menu and a vegetarian version based on it. Now we offer two completely different menus, where nothing overlaps, except perhaps in case of the products used.

**Can a star chef do without lobster or bresse chicken?**

That's exactly what makes our cuisine unique. We do without the products that you can get anywhere in the world. We enjoy showing guests what you can get out of a whitefish, for example. This fish is not very well known and I find it exciting to create a surprise effect with it.

**How do you choose your suppliers?**

They have to be keen to work closely with us. In January, we drew up a plan with a farmer for the whole of 2023 so that he knows what has to be produced for us and when, and in what quantities. The main criterion, of course, remains the quality of the produce. What role does zero-kilometer cuisine play? We don't focus on it completely, but what goes on the plate should reflect what the region has to offer.



### **What are the best sellers on the menu?**

We don't have a signature dish. Our menu changes regularly and no dish is offered twice. Only with the products are there repetitions: Arctic char is one of them because it's very easy to source over a long period of time. In the winter, we also offer pikeperch. I like to work with freshwater fish - it sets accents, because not many do that.

### **Let's get back to plant-based cuisine. Is it just a trend?**

No, it's more than that. More and more people are thinking sustainably and want to eat a plant-based diet. I can't imagine that changing again. We at least plan with vegan menus for the next few years as well.

### **In December, the Mural surprised with an 89-euro so called „Wumms“ menu. What's next?**

A Flower Power menu as part of the Flower Power Festival, which will be held in Munich from March. This will be accompanied by a guided tour of the Muca Museum, where we are housed.

### **Where else do inspirations come from?**

Often from the producers and from the products themselves. In our kitchen, the product should arrive on the plate as unadulterated as possible. So the question is, how do I prepare it so it tastes like what it is? Inspiration can also come from a snack stand; for example, we once had a köfte sandwich with kid meat from a small farmer in the region.

### **How cheap can a star chef cook? Would a student menu for 69 euros be conceivable?**

I think we've reached the limit of what we can calculate at 89 euros. Nevertheless, we would also like to make an offer to those guests who cannot afford a classic 4-course menu. That's feasible if you do without certain luxury products.

### **Will you continue to offer the 4-course „Wumms“ menu?**

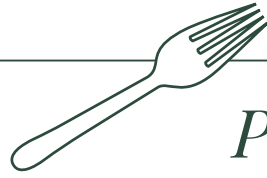
Yes, always Tuesday through Thursday, but limited to ten seats per evening.

### **What will the Flower Power menu look like?**

This menu was created in collaboration with the Muca Museum. There is a 4-course menu including apero, wine accompaniment and amues bouches. Everything else remains a surprise. The complete package costs 230 euros and also includes a guided tour of the museum with the owner Steffi Utz.

### **We are very excited and thank you for the interview.**

For reasons of space, we have shortened some parts of the interview for the Market Report. You can find the entire interview with Joshua Leise and many others with other exciting interviewees on our website under [Knowledge > Interviews](#).



## Picked up

### From kilograms to kilometers

As of February 28, the weight of all goods in our Hamburg warehouse totaled 8,484 tons. We have taken this nice figure as an opportunity for a small calculation example that illustrates this dimension.

**8,484 tons of goods** fit on **10,222 pallets**. If these were stacked on top of each other, it would be a **tower 16.35 kilometers high**. Not even the Burj Khalifa in Dubai, the tallest tower in the world, can match that. Our tower would be 20 times as high (in theory!).



If we were to empty the warehouse in one fell swoop, it would take **309 trucks** lined up to form a **5.8-kilometer-long caravan**. We prefer not to do that and, as always, supply you quickly and flexibly with the appropriate quantities as needed.

For all questions concerning logistics, please contact Michael Picciani to the side.

### A wide variety at the BIOFACH trade fair



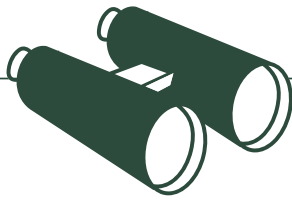
From February 14 to 17, 2023, Nuremberg was in an exceptional situation. Almost 36,000 trade visitors from 135 countries flocked to the exhibition duo of the World's Leading Trade Fair for Organic Food and the International Trade Fair for Natural Cosmetics on these days. In addition to the 2,765 exhibition stands, the 120 events of the BIOFACH and VIVANESS Congress rounded out the program. According to the official press release of the organizer, the talks and forums focused primarily on questions about current market developments and trends as well as political and legal framework conditions.

Our conclusion after a long day at the fair as visitors: Hurry for the personal encounters and conversations! Thus, in addition to business partners, we also met the Managing Director of the Waren-Verein of the Hamburg Stock Exchange: Jeanette Gonnermann. We are already looking forward to the coming Anuga trade fair from October 7-11. Which other trade fairs are coming up, we have listed in our Trade fair calendar summarized.

[Click here for impressions of our on-site visit to the trade fair.](#)

[Click here for the final notification of BIOFACH and VIVANESS 2023.](#)





## Outlook

### Logistics Watch Out!

Easter is already on the second weekend in April this year. During the four-day weeks (Good Friday on April 7 and Easter Monday on April 10), there is less freight space in Hamburg. In addition, truck driving bans are in effect in Italy, which may cause delays. We therefore ask you to allow a few days buffer and let us know your order and planning early. Our logistics experts Iris Wittur and Michael Picciani will be happy to help with any questions.

Three weeks later, the next Germany-wide holiday is already upon us: May 1 falls on a Monday this year. Here, too, we advise you to plan at least one buffer day for your logistics.



### Gestatten? Signor Rossi!



Despite all the shadows over the tomato sky described above, we currently have something wonderful to celebrate at Paul M. Müller: The new website for our premium brand Paolo Rossi is online. Our Pelati expert Signor Rossi is not only crazy about sun-ripened tomatoes from the south of Italy, but also has a knack for cool packaging, right? Take a look for yourself: On the Website or Instagram.

# Welcome on board, Isabella

## Isabella, what do you do at PMM?

I work in logistics as an interface to purchasing and sales. That means I take care of how the products are transported and organize the trucks, rail trucks and sea freight for this. As a result, I speak a lot of English - but sometimes also Italian or Spanish.

## Why did you choose PMM?

Because of many small things that made the difference for me from the beginning. For example, the website, where I had a positive impression right away. I also received a warm welcome at the interview - there was even a personal welcome on a board in the room. And as an Italian, I love good food. So my head, heart and stomach all voted YES when it came to the decision. Now I'm here!



## And how is the training going?

Really well. I'm enjoying working in a team again after my last job and supporting each other. For example, I work closely with my colleagues from purchasing and sales. My heart was right with its first impression: the atmosphere is great. Not just when we're working, by the way. We also regularly cook for each other during the lunch break and all eat together.

**We are happy to have you on board – good luck!**

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## PMM Community

You want to tell us a story or share experiences from the industry? Do you have feedback for us? Photos or stories? We would like to invite you to actively shape the PMM Market Report, and we welcome every contribution, suggestion and criticism. THANK YOU for taking the time to read and be a part of our PMM community.

