

PAUL M. MÜLLER

SEIT 1956

# FOOD NEWS

## MARKET REPORT

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*„Emotions are the foundation of our industry.“*

- Silja Steinberg, a passionate restaurateur -



## DOSED – our column

Some moments are memorable – not because they are loud or spectacular, but because they are real. A neighbor who provides help without being asked. A team member in the company who carries on with a smile despite stress. A look into the dining room where guests are laughing. These are the scenes that come to mind when I think about life and our industry - and about how much is changing right now.

Silja Steinberg – landlady of the Hofbräukeller on Wiener Platz and the Hofbräu tent at the Oktoberfest in Munich – also talked about emotions last week when the Leaders Club held its „Gastro Sessions“ series of events in the Hofbräukeller. The Leaders Club – a network of people and companies with a passion for gastronomy – once again brought together entrepreneurs, industry experts and founders to discuss and exchange ideas in panels and talks. The motto: „People, brands & emotions.“ And it's true: Whether on the market, in the kitchen or in the logistics center – nothing works without emotions, without passion, without people.

We are in the midst of a profound change. Driverless trucks are no longer a dream of the future, but part of reality. The first autonomous trucks are driving on expressways in commuter traffic. This is not only a technological

masterpiece - it is also a glimmer of hope for an industry that is suffering from staff shortages. And while innovations are emerging on the road, the global flow of goods is also coming under renewed pressure: freight rates between China and the USA are rising sharply – Hapag-Lloyd is reporting over 50 percent more volume on this route. The result: container bottlenecks, a lack of equipment in European ports and rising costs. Anyone moving goods currently has to act flexibly and with foresight. At the same time, the political stage is also coming into focus: the return to regular VAT in the hospitality industry is being discussed controversially – I see this as a good signal. It shows: The sector is once again being perceived for what it is – a strong, independent industry with a future. And what remains after all this change? Emotions. I firmly believe that our industry - whether it be gastronomy or food retail – is needed more than ever: as a place to meet, as a driver of innovation, as a reflection of our society. Because at the end of the day, it's not just perfect processes that count, but the good feeling we leave people with.

Sincerely,  
Yours, Thomas Schneidawind

### Pineapples: Tension in the market

2,500 tons - that was the daily supply of pineapple raw material in Thailand in mid-March. By the end of April, it had climbed to 4,800 tons per day, before falling back to 3,800 tons at the beginning of May. There is now talk of a daily supply of less than 3,000 tons (as at 19 May 2025). During this period, fruit prices fell rapidly and briefly reached between 11.20 and 11.80 Thai baht in April, for example. For comparison: In February, a kilogram of raw fruit cost between 16 and 17 Thai baht. Now, in mid-May, prices are between 12.50 and 13.00 Thai baht per kilogram. At the same time, some factories are cutting back their production days and reducing the quantity on offer. This is because small, nitrate-rich fruits are still a challenge in terms of quality on the market.

The price of processed products changed (or fell) less. The main reason for this is the high demand from the USA. This is because Donald Trump suspended tariffs on Thai imports to the US for 90 days on April 9.

Thai packers expect the supply volume to increase again at the beginning of June and are talking about prices of around 12 Thai baht per kilogram of raw goods. The Thai Food Processors Association (TFPA), on the other hand, is expecting an average daily harvest volume of 3,200 tons in June - which would not be very much.

However, the pineapple market is not only tight in Thailand, but also worldwide - for example in Kenya. Due to unusually heavy rainfall at the beginning of 2025, the fruit was



harvested earlier than usual. At that time, the raw material exceeded the factories' production capacities. Now, a few months later, there is a shortage of precisely this raw material. Due to the upcoming „low season“ from June to August, the situation will not ease again until September 2025 at the earliest.

We are of course in close contact with our partners and will continue to keep you informed about developments relating to pineapples.

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# Tomatoes:

## Delays in setting

The new tomato season has now officially begun in Italy, Spain, Portugal and Turkey with the planting of the tender tomato plants in the fields. There have been delays in some areas. The challenge is that if the seedlings grow too big, they can no longer be planted in the fields because their size makes them too unstable and they can no longer develop a sufficiently strong root system in the soil. The specific situation in the various growing regions is as follows:

Due to the unstable weather, relatively low temperatures and a lot of rain, the tomato plants in northern Italy could only be planted after a delay. However, our local partner is optimistic that these delays can be made up for in the next few days. The outlook for water is equally positive - at least in northern Italy, it does not appear to be a limiting factor this year either. The situation is different in southern Italy, where reserves are already alarmingly low.

Due to the lack of water, the areas under cultivation there have already been reduced (we reported in the Food News 3/2025). The planting of the tomato plants, on the other hand, is going wonderfully according to plan.

Our partner in Spain and Portugal reported the longest delays. At the time of our interview on May 15, these figures were known in the Spanish region of Extremadura, for example: In the Vega Alta area, around 60 to 70 percent of the planned plants had been planted, in Vega Baja just 15 to 20 percent. For both areas in this region, the planting rates are normally already around 80 to 90 percent at this point. We received similar figures from Portugal: Here, a maximum of one third of the planned plants are in the ground so far. According to the regular schedule, the planting rate here should also be around 80 percent. „It will not be possible for the growers to completely make up for these delays,“ says our contact. It is likely that some of the plants will not be able to be planted. More concrete information and figures will be available at the end of the month.

Finally, a look at Turkey: here too, planting is two weeks behind schedule due to the weather and will continue until the beginning of June. In addition, some growers have decided to plant tomatoes relatively late, as the profit prospects were initially discussed as uncertain. According to our partner's initial estimates, the harvest volume could therefore be around 10 percent lower than usual.

What does this mean for the 2025 tomato season? One thing is clear: the harvest will start later than usual in many places - and will depend on all the climatic challenges that are possible in September and October. With our Food News We will, of course, keep you up to date at all times.



# Peppers and hot peppers: High labor costs

For an update on peppers and chilli peppers, we look to Turkey: the areas under cultivation there are comparable to those in 2024 – although those for Lombardi peppers and jalapenos are slightly smaller this year. As with tomatoes in Italy, Spain and Portugal, the comparatively low temperatures posed a challenge for growers in spring. They were around five degrees below average. The seedlings could therefore only be planted in the fields after a delay. However, all the seedlings are now in the ground and experts are expecting an average harvest. No further delays are currently expected.

What does this mean for prices this season? Raw material prices appear to be back at the previous year's level - although there is talk of increases of up to 30% in some places. What is already clear, however, is that labor costs have risen sharply. Compared to 2022, they have risen more than sevenfold. As peppers and hot peppers are harvested by hand, these additional labor costs will have a direct impact on the price of the end products.

Added to this are increased costs for packaging materials and the continuing high inflation in the country. According to Tagesspiegel, the inflation rate was at its lowest level since 2021 at the beginning of May - but it is still disproportionately high. Even the devaluation of the Turkish lira cannot cushion this completely, as many products are paid for in euros (e.g. vinegar) and US dollars (e.g. tin cans).

We cannot report much about specific prices at the moment. However, our partners expect to know more details by the end of May.



# Maple syrup: Harvest completed

The production of maple syrup requires generations of work: It takes 40 years from planting to the first harvest of the maple trees. The total lifespan is actually around 200 years. Every year in spring, when the temperatures get warmer and the days longer, the starch molecules in the trees, which can grow up to 40 meters high, turn into sugar. The harvest therefore takes place between March and April. A hole 2 to 3 cm deep is drilled into each trunk and the tree is tapped above it. In this way, each tree provides around 100 liters of maple sap per season, which is boiled down within 24 hours in so-called „sugarhouses“. This reduces 40 liters of tree sap to 1 liter of maple syrup, producing the distinctive color of maple syrup. Incidentally, there are visual and taste differences depending on the time of harvest (more on this here in our Glossary article about maple syrup).

80 percent of the world's maple syrup comes from Canada. The 2024 harvest there was a record year for the industry with 239 million pounds (approx. 108.41 million kg) of maple syrup. Final figures and data for the 2025 season are not yet available, as the association „Québec Maple Syrup Producers“ (QMSP for short - or „Maple syrup from Canada“) announced. Exact figures will be available at the end of June. However, our local partner has already reported a trend to us: „The first signs point to an average harvest. The historical average is 3.5 pounds (i.e. approx. 1.6 kg) per tap. If the trend is confirmed, we can expect around 3.7 to 3.9 pounds (i.e. up to 1.8 kg) per tap this year.“ With our „Maple Moon“ brand, we have established ourselves as a reliable partner for maple syrup in recent years - both in the organic and conventional sectors. Our 250 ml bottles and 1,000 ml PET packaging are very popular on the market. Paul M. Müller therefore also stands for quality and continuity in this product segment. If you are interested in this product group Eduard Kekel is the right contact for you.



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## Agate snails: Worth knowing

Hard shell - soft core. This is the case with agate snails (known as *Achatina fulica*). Their shell is described as „pointed-spherical“, whereas that of the vineyard snail is „round-spherical“. Due to their tender meat, they are a delicacy and are eaten as an appetizer or soup in France, for example. For some years now, they have been an integral part of our Adria delicatessen range. For an insight into production, we invite you on a mental journey to Indonesia: There, the snails are collected by farmers in the jungle or on organic plantations one month after the start of the rainy season (which usually lasts from the end of November to the beginning of June). They are therefore 100 percent wild-caught. After blanching the snails, workers remove the guts. The subsequent steps are also carried out by hand - namely cleaning, sorting and filling into cans. After adding the infusion, the cans are finally sealed, sterilized and prepared for export. By the time the delicacy reaches us, it has already come a long way.

By the way, did you know that the VAT rate for agate snails is 19% instead of the usual 7%? This is because, although basic ingredients as well as processed products (which are purchased without a qualified service such as in a restaurant or snack bar) are taxed at the reduced rate of 7 percent, snails are an exception. Just like caviar, processed crayfish, lobster and oysters, they are subject to 19% VAT. Exciting, isn't it?

Would you like to find out more or try out the agate snails?  
Please feel free to contact us.

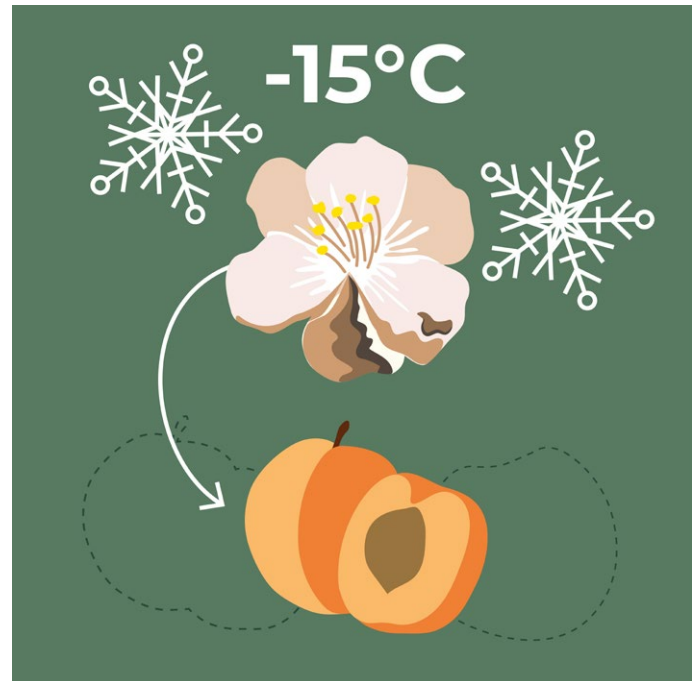




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## Apricots: Across-the-board yield losses

A beautiful sight: The apricot blossom with its white to light pink buds. Not so pleasant when the delicate blossoms are confronted with snow and frost. Unfortunately, this was the case in many growing regions this spring: It snowed in Turkey in April and temperatures dropped as low as minus 15 degrees in some areas - the lowest temperatures in the last 30 years in some places. As a result, Turkey's leaves, buds and fruit of agricultural products suffered greatly. The extent of the damage to the apricots will only become clear at harvest time. However, our local expert told us a few days ago: „Optimists expect losses of 20 to 30 percent, others are talking about 40 to 50 percent.“ Prices will therefore rise - also because the same fruit is used for the fresh market and for industrial use. Similar information from Italy and Greece: It is too early for exact figures. However, the trends are clear here too. The news from northern China are also negative. A cold spell in mid-April was followed by severe storms. Particularly hard hit: The two major regions of Shanxi and Hebei. „Fruiting was disrupted as a result. We are currently assuming a crop decline by 30 to 40 percent,“ says our partner. No matter where we look at the moment: The apricot market is tight. Waiting for the harvest is difficult with these prospects. We will of course continue to report for you in our Food News.



# INTERVIEW

## NACHGERFRAGT:

Marken entwickeln, die Eindruck hinterlassen



INTERVIEW MIT LUKAS NIKOL  
DESIGNAGENTUR FANTOMAS

*„Generic design does not ensure recognition or positive associations. If you want your product to stick in consumers' minds, you have to invest in a design that is linked to the quality of the product.“*

– Lukas Nikol –

**Whether logo, website, packaging or trade fair stand: the design agency Fantomas is behind the visual language of Paul M. Müller. The Munich-based company has not only developed the various PMM products visually, but has also shaped them into brands that leave a lasting impression in the minds of consumers. A conversation with Lukas Nikol, one of the partners at Fantomas, about brand development, design and the philosophy behind Paul M. Müller's products.**

**Adria is Paul M. Müller's top brand. How would you describe the brand?**

Adria stands for reliability. With this product, every recipe succeeds reliably and the taste always remains the same. The brand conveys security - like a crane that you can hold on to. As a design agency, we consciously convey these values of familiarity, consistency and quality with the logo and design.

**You have been working with Paul M. Müller for three years. Take us back to the beginnings...**

When Thomas Schneidawind joined us three years ago, Adria was already well positioned, but there was a need to optimize other brands. Our aim was to develop a design that would clearly stand out from comparable products - with a high-quality look that would make the products

stand out on the shelf. A versatile brand world emerged from the portfolio, which at the time was strongly focused on Adria.

**How exactly did you achieve this?**

New brands such as Avanti, Paolo Rossi and Donna Rosa were brought to life. The difference between the individual brands was clearly worked out. We developed a consistent brand identity for each brand. It was clear from the outset: to create desirability, we need a visual design that conveys both recognition value and high quality. Incidentally, quality is always at the heart of all brands - no matter how different the brands appear.



### **What was your goal in developing the brand?**

We wanted to create a high recognition value. A customer who has used a product before should immediately think: „Adria again at last!“ the next time they buy it. Thomas Schneidawind and his team ensure that the product is always of the best quality - we make sure that the design is so consistent and recognizable that the customer immediately knows that they are holding the „right“ can in their hands.

### **Why is brand perception so important?**

If you had a good product but now you can't remember which one was the right one, it doesn't help. Generic design not only ensures recognition or positive associations. If you want your product to stick in consumers' minds, you need to invest in a design that is linked to the quality of the product.

### **How do the brands differ in design?**

Every brand has its own visual language. Adria has a high-quality and emotional impact through images of fresh raw produce. Donna Rosa relies on simple, graphic elements - such as the striking, two-tone cans with clear illustrations that immediately catch the eye. The aim is to create a design that intuitively conveys to customers what product they are holding in their hands. A well-designed product creates a positive memory that also has a long-term effect.

### **Paolo Rossi is another brand that was developed with you. How did this come about?**

Paolo Rossi was created as a spin-off (a kind of subsidiary brand) that focuses on high-quality peeled tomatoes. We wanted to create a brand that is aimed at pizzerias and Italian restaurants and build up an independent standing in the market in the long term. Especially in large cities, where the willingness to pay for high quality is high, the price only plays a subordinate role when shopping. What counts is the quality of the tomato, which enhances the taste of the pizza. Paolo Rossi is aimed at a quality-conscious environment and shows how flexible Paul M. Müller is when it comes to brand development.

### **Have the values of the Paul M. Müller company been incorporated into the various logos?**

The brands are known for freshness and the design should reflect the freshness of the respective product. Of course, it would be tempting to position Paul M. Müller and its products as a traditional brand, for example by adding flourishes to the design, but values such as reliability, trust and expertise can also be made visible in the corporate culture and the commitment of the employees, for which - in the case of PMM - the design is inappropriate.

### **What does the term „brand maker“ mean to you?**

Together with Fabian Kretschmer and the entire team, Thomas Schneidawind has exceptional skills in bringing products to market quickly and has a keen sense of market needs. His excellent network of producers and the extensive expertise of his employees at Paul M. Müller in the development of brands make it possible to develop targeted brands for contract customers. Real brand makers. The brand makers are also intended to appeal to foreign manufacturers who want to successfully establish and market their possibly still unknown brand on the German market via the PMM platform. I know from Thomas Schneidawind: PMM creates real added value for producers through an international network, sophisticated logistics, an experienced sales team and professional quality assurance. There is only one central point of contact - everything from a single source. The producer does not even have to worry about debt collection. Successful examples such as the La Rosina, Citres and Maple Moon brands show how well this model works. Renowned labels such as Mutti have also found a reliable home with brand maker PMM.

### **What other special features are there with the Paul M. Müller brands?**

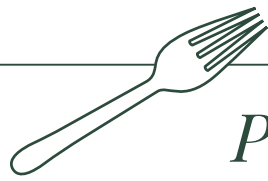
The company appeals to a broad target group: The brands themselves are aimed at end customers - the buyers and partners are more associated with Paul M. Müller. Basically, you can compare it to a food company like Nestlé. People know the name Nestlé - but the products ultimately stand for themselves. It is therefore important to clearly emphasize the separation between Paul M. Müller and its brands in order to strengthen the identity of each brand.

**Do you have a favorite logo - outside the Paul M. Müller company cosmos?**

One logo that has fascinated me since I was a child is that of UPS. Despite the simple color scheme and design, UPS has built a strong brand identity that is characterized by the distinctive delivery truck and the coat of arms. This example shows how you can create a strong brand perception with simple means - worldwide.

**ABOUT FANTOMAS AND LUKAS NIKOL:**

Fantomas is a design agency based in Munich and, according to Lukas Nikol, „specializes in everything that can be designed and perceived - from visuals that you can see and touch to spatial concepts such as trade fair construction.“ He also came up with the idea for Paul M. Müller’s trade fair stand. Lukas Nikol: „The idea of setting up a giant box that you can walk around and use for meetings may seem simple, but it has a strong, tangible effect. The concept is based on a simple but powerful idea.“



### Picked up: Brenner in focus

The Brenner route, one of the most important north-south connections in Europe, is currently under particular scrutiny. The reason for this is the complete reconstruction of the Lueg Bridge on the A13, just before the Brenner Pass. We have already reported on this in our Food News in January.

During the construction work, the existing bridge will remain in operation to a limited extent and can usually only be used in one lane. For safety reasons, heavy traffic will be shifted to the left-hand lane in order to relieve structurally sensitive areas. As soon as both lanes are open on busy days, cars drive on the right-hand side. „The new traffic routing is currently working wonderfully,“ says Dr. Korbinian Leitner, Head of the Traffic Department at the IHK for Munich and Upper Bavaria. He reports that the highway operators on both the Austrian and German sides have also been satisfied with the development so far. The situation was stable into the second quarter - also due to the lower transport volume at the beginning of the year. However, the restricted time corridor for transit traffic

remains a problem. The Saturday driving ban from 7 a.m. - instead of Saturday afternoon as previously - is keeping haulage companies busy but was introduced to relieve vacation traffic.

So far, there has been little evidence of a shift in freight transport to rail. Dr. Korbinian Leitner: „Although rail is basically an alternative, many companies are not yet making greater use of it.“ He draws a positive interim conclusion: „ASFINAG, which is responsible for the Austrian freeway and expressway network, is doing a good job and keeping the axis open. The alternative would have been a complete closure to heavy traffic - that would have been the worst-case scenario.“

At the same time, the ADAC points out that border controls are currently causing traffic jams and delays anyway.

Although the Munich Federal Police Directorate wants to keep the disruption to delivery traffic and travelers to a minimum, the increased presence is noticeable, according to the Homepage of the ADAC. In Freilassing, at the Saalach bridge near Salzburg, another fixed checkpoint was set up.

A stress test could also be imminent during the summer travel season, according to voices from the freight forwarding industry.



## Picked up: Egypt as a supplier country

We have been working with our partners in Egypt for many years and obtain artichokes, jalapenos and olives from there, for example. Following the severe financial crisis in 2023 and 2024, the economic situation is now stabilizing and Egypt is becoming increasingly relevant on the global market. While the inflation rate in 2024 was still at a historic high of 33.3% (and some products were no longer competitive for import into the EU), it is now forecast to be around 19.6% in 2025 (source: Statista). A (further) containment of inflation is also likely to be crucial for the country's long-term economic stability. According to a survey of 17 economists conducted by the Reuters news agency, Egypt's economic growth for 2025 is currently estimated at 3.8%. Originally, the forecast was as high as 4 percent. However, due to the tariffs imposed by the USA and the expectation of slower global growth, the economists revised their expectations downwards accordingly in April. The fact is: Egypt is an exciting supplier country and we are happy about the good, long-standing partnerships with our suppliers there.



# Fruit of the Month: Jorge Alonso Macias

**A reason to celebrate:** Jorge Alonso Macias is part of our Paul M. Müller family since mid-January. In Logistics, he is responsible for everything to do with track. In this interview, Jorge tells us exactly what that means and how he has settled in.

**Nothing works at PMM without logistics. What exactly are your tasks here?**

I take care of orders that are transported by truck - whether by road or rail. Hence my job title „Logistics - Route“. This involves checking all incoming orders and keeping an eye on delivery dates. As a first step, I calculate the costs and prioritize the individual orders. After all, everything has to arrive on time for our customers.

**Sounds challenging, especially in time periods with many holidays ...**

That's exactly right. I now also understand what my colleagues meant when they joked before Easter that all the upcoming holidays in logistics always mean tension and a lot of advance planning in addition to free time, days off and celebrations. But that helps me: I've already worked in various jobs in sales and customer service. Here too, it's all about keeping a cool head in stressful phases.

**We really appreciate that about you. How did you end up in logistics with us in the first place?**

I discovered the advertised position online. I wanted to get out of my remote job and finally work in an office with direct colleagues again. I felt exactly the atmosphere I had hoped for in the interview. I was really pleased that it worked out in the end. And my gut feeling and my brief research on PMM as an employer on Kununu haven't proved me wrong so far.

**That makes us happy. We're glad that you're here.**







## The good news

### Community catering on the upswing

Positive news from the 8,000 company restaurants in Germany: after the coronavirus low, the number of guests who visited company-owned catering establishments in 2023 rose by 36.6% compared to the previous year. Growth continued in 2024. Overall, the figures for communal catering are impressive: „With a turnover of 16.8 billion euros in 2024, it is an ‚underestimated giant‘ in the out-of-home catering sector“, according to the new study by the Denkfabrik Zukunft der Gastwelt (DZG for short) and the German Institute for Communal Catering (DIG). Communal catering accounts for around 20 percent of total turnover in the AHV market. It serves 17 million guests every day across the board - whether in company restaurants, canteens, care facilities, schools or kindergartens. A clear trend: vegetarian and vegan dishes are becoming increasingly important. 90 percent of all caterers now offer a vegetarian lunch every day. This is an exciting development that we are following with interest and actively helping to shape - for example with our diverse Adria products. They are ideal for uncomplicated use in (plant-based) commercial kitchens.



### 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.

Your



from Paul M. Müller

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