



TomatoEurope

PROCESSORS ASSOCIATION

**Friday , October 21, 2022
Fruit & Vegetable Market Observatory
Sub-group Tomatoes**

**Crop 2022
Tomatoes for processing
FINAL RESULTATS
(Provisionals)**

Forecast June 29, 2022

**Expected drop in
European production:**

-14,1%.

**The problem is the water
... but also competition
from other crops
(Ukrainian crisis)**

FINAL October 21, 2022

**European production
dropped even more than
expected**

-17,8%

**due to climate problems in
the Iberian Peninsula, Greece
and France**

**Above all, production
dropped by – 10,4 %
compared to the average of
recent years**

EU Processing tomatoes

Crop 2022 FINAL (provisional)

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

	Average 2016/2021	2020 FINAL	FINAL 2021	PRODUCTION INTENTIONS (March 2022)	FINAL 2022 (Provisional)	VARIATION 2022 vs 2021	VARIATION vs INTENTIONS 2022	VARIATION 2022 vs average 2016/2021
Italy	5.267	5.166	6.059	5.400	5.470	-9,7%	1,3%	3,8%
Spain	3.106	2.650	3.185	2.500	2.100	-34,1%	-16,0%	-32,4%
Portugal	1.480	1.262	1.596	1.450	1.300	-18,5%	-10,3%	-12,1%
Greece	414	420	420	380	340	-19,0%	-10,5%	-17,9%
France	171	136	164	170	142	-13,4%	-16,5%	-16,9%
TOMATO EUROPE	10.438	9.634	11.424	9.900	9.352	-18,1%	-5,5%	-10,4%
Malta	8	8	7	8	7	0,0%	-12,5%	-12,0%
Bulgaria	45	40	40	40	40	0,0%	0,0%	-11,1%
Czech Republic	25	25	25	25	25	0,0%	0,0%	0,0%
Hungary	101	82	115	100	80	-30,4%	-20,0%	-20,6%
Poland	191	175	175	175	175	0,0%	0,0%	-8,5%
Slovakia	20	20	20	20	20	0,0%	0,0%	0,0%
Croatia	10	10	10	10	10	0,0%	0,0%	0,0%
Total EU	10.838	9.994	11.816	10.278	9.709	-17,8%	-5,5%	-10,4%



World production

- The Russian invasion had a very heavy impact on production in Ukraine (almost zeroed out)**
- European and Californian production dropped even more than expected due to climate problems**
- World production fell by only 5% thanks to the strong recovery of Chinese and also Turkish production**

Major producing countries and total world production (Final resultats provisional 2022 x.000 tons)

	Average 2016/2021	FINAL 2020	FINAL 2021	PRODUCTION INTENTIONS (March 2022)	FINAL 2022 (Provisional)	VARIATION 2022 vs 2021	VARIATION vs INTENTIONS 2022	VARIAZIONE 2022 vs average 2015/2021
California	10.144	10.258	9.761	11.066	9.525	-2,4%	-13,9%	-6,1%
Italy	5.267	5.166	6.059	5.400	5.470	-9,7%	1,3%	3,8%
China	5.436	5.800	4.800	5.800	6.200	29,2%	6,9%	14,0%
Spain	3.106	2.650	3.185	2.500	2.100	-34,1%	-16,0%	-32,4%
Turkey	2.138	2.500	2.200	1.950	2.350	6,8%	20,5%	9,9%
Iran	1.230	1.300	1.300	1.300	1.300	0,0%	0,0%	5,7%
Portugal	1.480	1.262	1.596	1.450	1.300	-18,5%	-10,3%	-12,1%
Brazil	1.416	1.421	1.525	1.800	1.500	-1,6%	-16,7%	5,9%
Chile	1.018	907	1.174	1.050	971	-17,3%	-7,5%	-4,6%
Tunisia	774	961	940	870	610	-35,1%	-29,9%	-21,2%
Algeria	757	1.000	1.000	1.000	800	-20,0%	-20,0%	5,6%
Ukraine	693	800	800	500	180	-77,5%	-64,0%	-74,0%
Russia	418	515	523	600	600	14,7%	0,0%	43,7%
Canada	430	438	399	408	535	34,1%	31,1%	24,3%
Egypt	360	420	440	440	440	0,0%	0,0%	22,2%
Greece	414	420	420	380	340	-19,0%	-10,5%	-17,9%
Argentina	469	454	596	630	626	5,0%	-0,6%	33,4%
USA excluding California	433	463	462	462	450	-2,6%	-2,6%	4,0%
Others	2.127	1.655	2.004	2.065	1.942	-3,1%	-6,0%	-8,7%
WORLD	38.127	38.390	39.184	39.671	37.239	-5,0%	-6,1%	-2,3%

Consequently, in the 2022, the percentage of European production, compared to world production, has dropped significantly (despite the good performance of Italian production)

EU vs World

Tomatoes for processing (Final 2021 and Forecast 2022)

	Average 2016/2021	2019 FINAL	FINAL 2020	FINAL 2021	FINAL 2022 (Provisional)	VARIATION 2022 vs 2021	VARIATION vs INTENTIONS 2022	VARIATION 2022 vs average 2016- 2021
European Union	10.838	10.343	9.994	11.816	9.709	-17,8%	-5,5%	-10,4%
Other Countries	27.289	27.040	28.396	27.368	27.530	0,6%	-6,3%	0,9%
GENERAL TOTAL	38.127	37.383	38.390	39.184	37.239	-5,0%	-6,1%	-2,3%
% UE	28,4%	27,7%	26,0%	30,2%	26,1%			

All processors complain about **an exceptionally expensive campaign**, due to the increases linked in particular to energy and packaging.

We have to see how this will affect:

- on the profitability of processing companies*
- on product prices*
- on consumer demand*



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The organic processing tomatoes seems to be in trouble.

In the two main producing countries:

- In Italy, production is stabilizing**
- In California it dropped significantly.**

The causes appear to be multiple, both technical and economic



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FIRST STUDIES ON THE POSSIBLE IMPACT OF CLIMATE CHANGE ON PROCESSING TOMATO PRODUCTION

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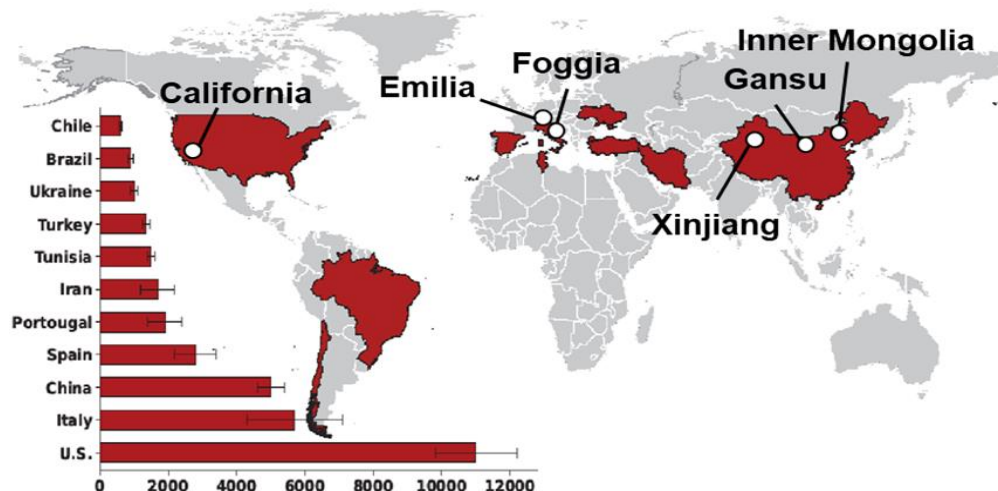


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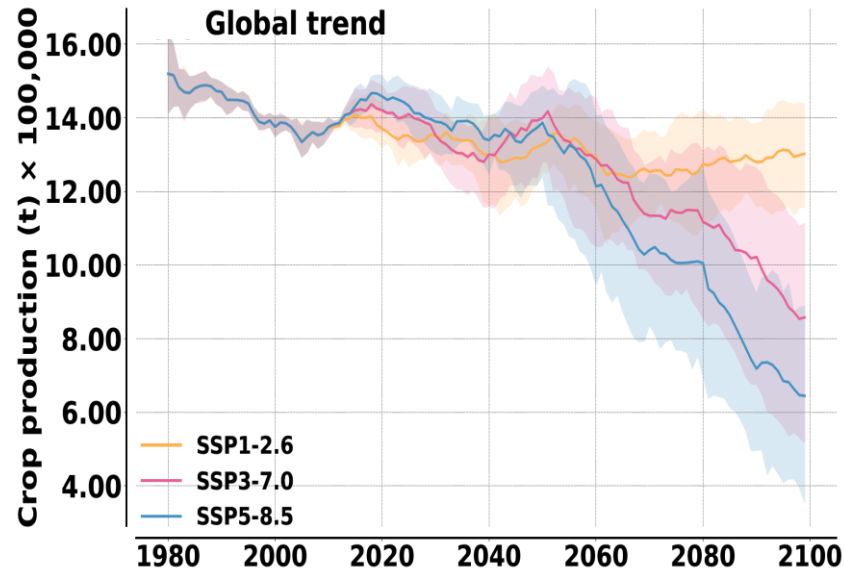


Introduction

- Most of climate change impacts concentrated on wheat, maize, rice, potato
- Climate impacts on processing tomato has implications for the processing industry on “where” and “how” to outsource and grow it
- Their production is concentrated in ten major “tomato baskets” around world and three of those (USA, Italy and China) account for +65% of the global production
- Studies on climate impacts on processing tomato done at point-based/regional level



Global production

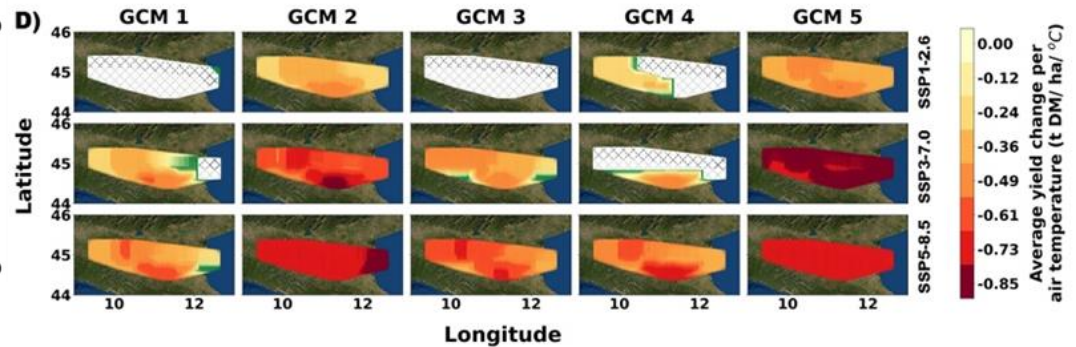
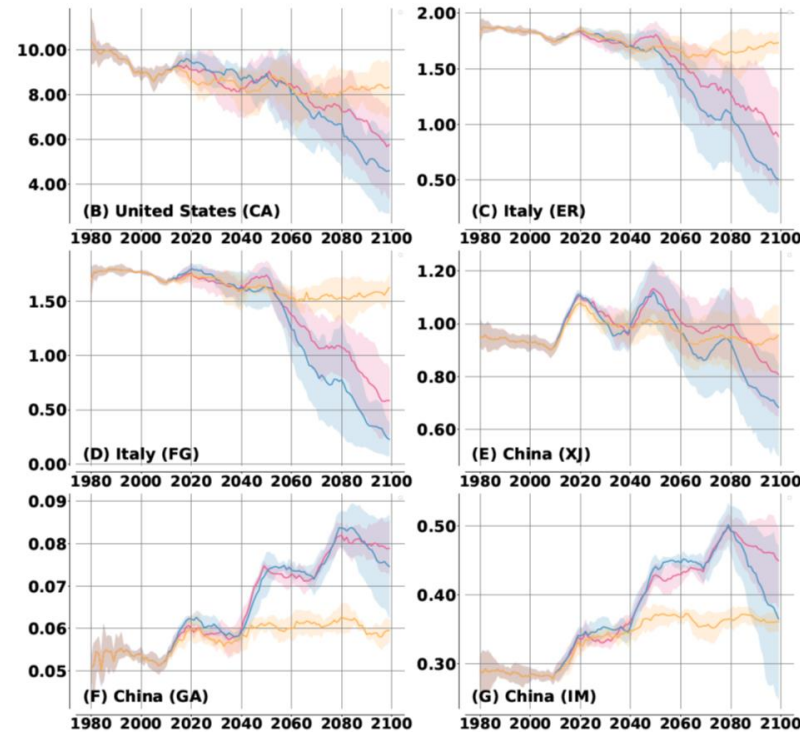


- Global production to decrease by 6% by 2050
- Differences between SSPs are minimal up to 2050
- Further divergence afterwards
- Variability of mean production increase after 2050 as well
- Highest drop after 2050 with SSP5-8.5 (about +5°C of increased temperature respect 1980-2009)

- *SSP-RCP scenarios representing low (SSP1-2.6), high (SSP3-7.0), and very high (SSP5-8.5) greenhouse gas emission and related socioeconomic conditions*
- *Projections based on the Coupled Model Intercomparison Project Phase 6 (CMIP6)*
- *The selected Global Climate Models (GCMs) represent a range of high and low climate sensitivities*

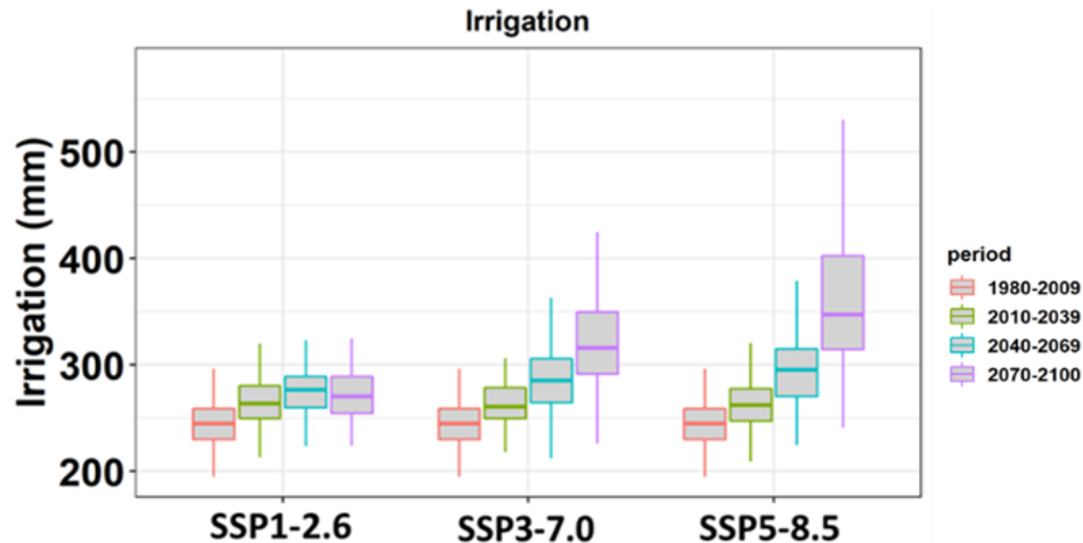
Regional Production

- China is projected to maintain a viable production
- California and Italy showed a large decrease
 - Published results from process-based studies in Foggia show similar decrease (15 to 18%)
- Spatial differences in terms of climate impacts



Water requirements

- Growing season rainfall variable according to location and GCMs
- Overall, for the period 2040-2069 amount of water for irrigation will increase by 5 to 50% respect the baseline
 - Implication for processing tomato is not about how much water but “competition” for water
 - Breeding and agronomy (e.g. biostimulants, irrigation techniques) as way to offset climate impacts





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Thanks for your attention