

Review of the winter campaign 2022/23
and
forecasts for the summer campaign 2023
for the main producing countries



Topics:

- Recap of last 3 years
- Review of the winter campaign 2022/23
- Forecasts for the summer campaign 2023
- What awaits us



Recap of last 3 years

Italian and EU markets evolve continuously.

Some of the aspects that had affected and continue to affect the tomato market are:

- The COVID-19 pandemic had a positive impact on tomato prices.

						difference in %	
ANNUAL PRODUCTION	2020	2021	2022	f2023		20/21	21/22
Production fresh tomatoes (tonnes x 1000)	6247,9	6644,8	6428,7			6,4	-3,3
% organic	519,5752	613,5807	652,513			18,1	6,3
% non-organic	5728,3248	6031,2193	5776,187			5,3	-4,2
% greenhouse	496,8294	594,1741	562,509			19,6	-5,3
% open field	5751,0706	6050,6259	5866,191			5,2	-3,0
%Round tomatoes	5483,0978	5780,11585	5592,971			5,4	-3,2
%Vine tomatoes	402,9258	369,91485	387,3285			-8,2	4,7
%Other tomatoes (cherry, mini-type...)	361,8764	494,7693	448,4005			36,7	-9,4
% destined to national market	5475,036	5747,0895	5676,543			5,0	-1,2
% destined to exports EU	690,6418	784,6164	658,941			13,6	-16,0
% destined to exports non-EU	82,2222	113,0941	93,216			37,5	-17,6



- Climate change issues affecting Italy and Europe.

						difference in %	
ANNUAL PRODUCTION	2020	2021	2022	f2023		20/21	21/22
Surface fresh tomatoes (ha)	65634	71190	65180			8,5	-8,4
% organic	8479,12	9315,17	8575,08			9,9	-7,9
% non-organic	57154,88	61874,83	56604,92			8,3	-8,5
% greenhouse	5453,34	6745,16	5726,68			23,7	-15,1
% open field	60180,66	64444,84	60054,28			7,1	-6,8
%Round tomatoes	55073,1	58581,97	55144,92			6,4	-5,9
%Vine tomatoes	3674,62	3116,96	2777,96			-15,2	-10,9
%Other tomatoes (cherry, mini-type...)	6886,28	9491,07	7257,12			37,8	-23,5
% destined to national market	57471,6	62713,18	57432,72			9,1	-8,4
% destined to exports EU	7292,86	7402,1	6790,44			1,5	-8,3
% destined to exports non-EU	869,54	1074,72	956,84			23,6	-11,0

- The price increase in raw materials and energy because of the Russia-Ukraine conflict.
- The energy cost increase caused delay or deleting of Northern European countries production.



Review of the winter campaign 2022/23



The balance of the 2022-2023 season can be considered quite satisfactory, with prices increasing by approximately 10% compared to the previous year.

The issues faced in the last winter campaign are:

- Inflation changing consumption choices of the clients.
- Temperatures higher than the average ones that impacted the production schedule.
- Tomato Brown virus that had an impact on the production quality, especially on vine tomatoes.
- Difficulties to have enough manpower.



Forecasts for the summer campaign 2023

Possible delays in summer production caused by unforeseen weather events (like those witnessed in the past month), particularly with regards to tomatoes for processing. The overall quantities are estimated to be similar to those of the previous season.

The challenge of summer manpower shortages, which undoubtedly represents the most significant uncertainty in agricultural planning.



What awaits us

The other factors that may influence the market and production, not only in the upcoming season but also in many seasons to come, include:

- The evolving situation in Morocco and Turkey, where the export of tomatoes is currently prohibited.
- The end of the energy crisis will lead to a resumption of production under artificial lighting.
- The power of G.D.O.s that are in a dominant position.



THANK YOU!

