

# Spanish contribution

- Winter & Summer campaigns
- Consumers preference and consumption
- Extra-EU suppliers
- ToBRFV virus



EU FRUIT AND VEGETABLES MARKET OBSERVATORY

*SUBGROUP TOMATOES*

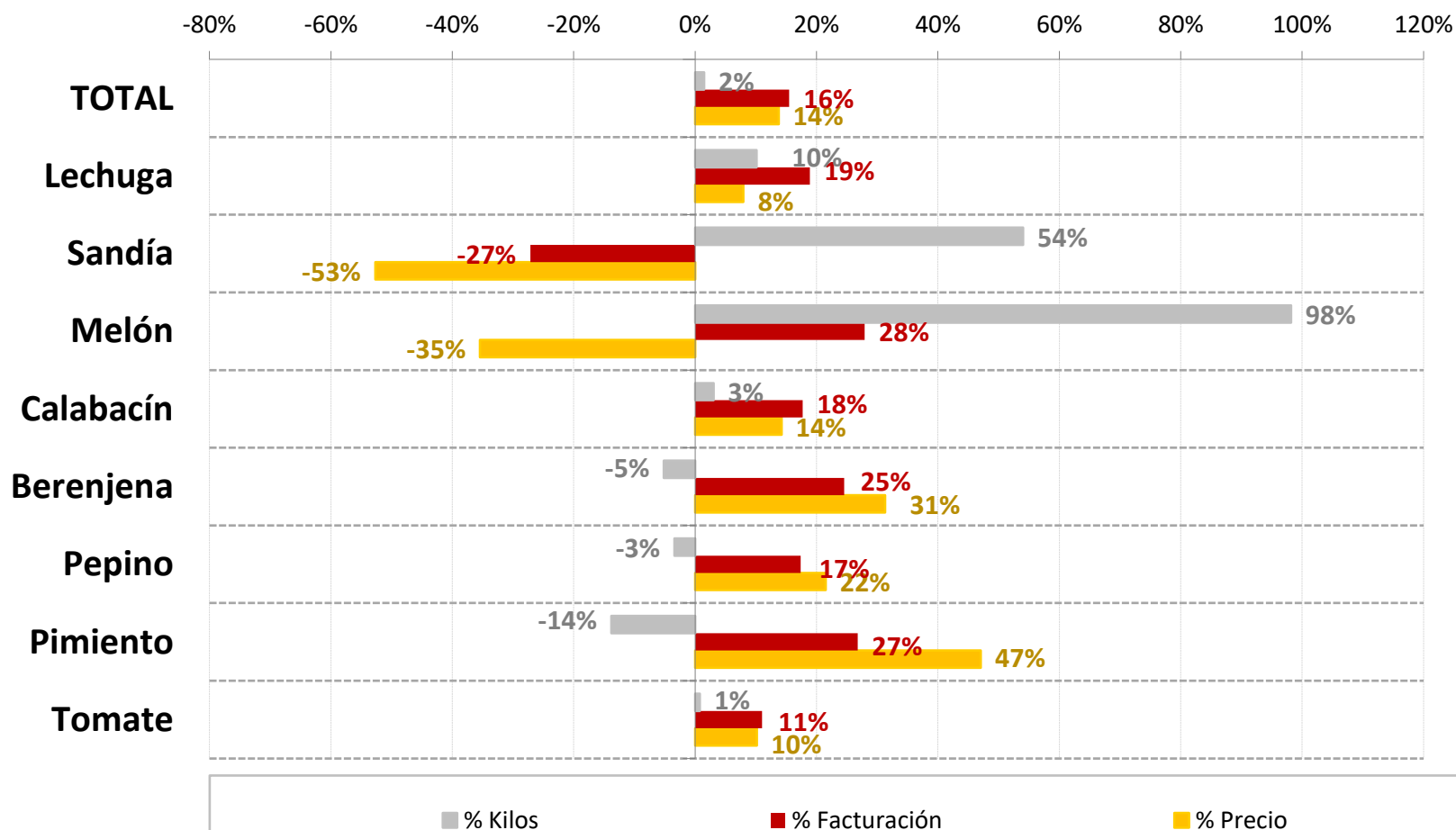
19th June 2023



# Balance of the winter campaign

Monitoring season: Sept 2022 - MAYO 2023

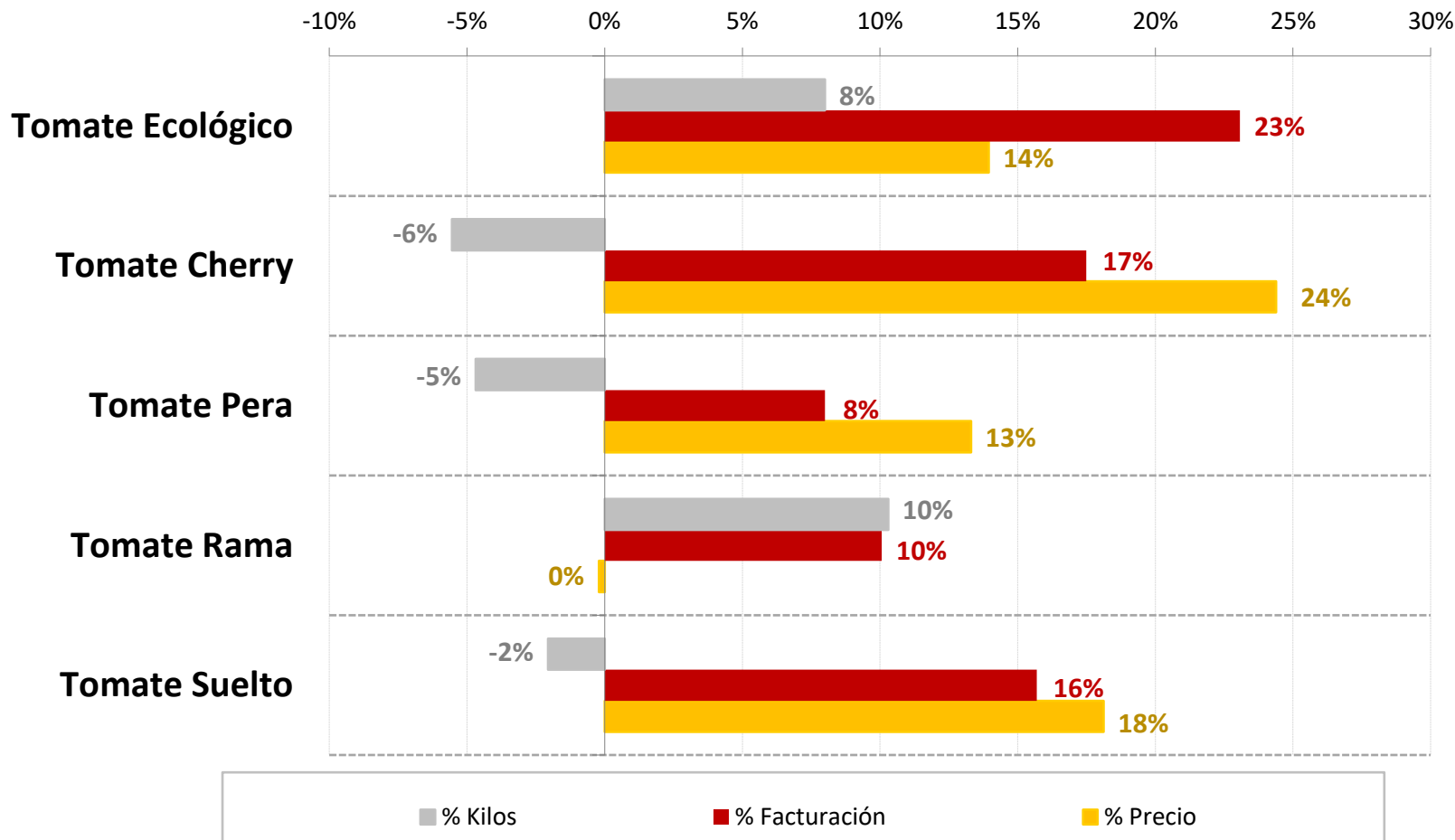
COMPARED TO THE PREVIOUS SEASON



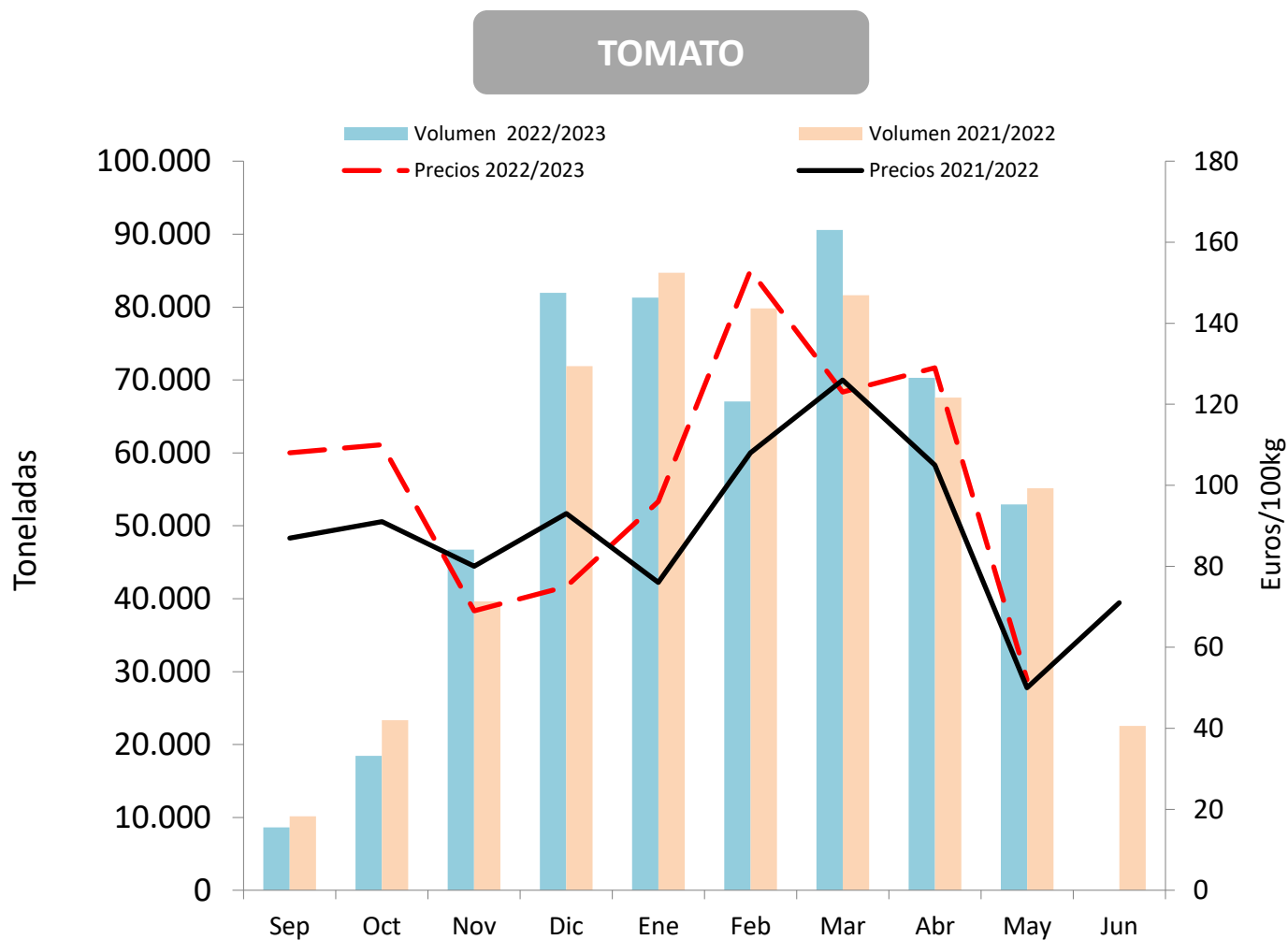
# Balance of the winter campaign

Monitoring season: Sept 2022 - MAYO 2023

COMPARED TO THE PREVIOUS SEASON



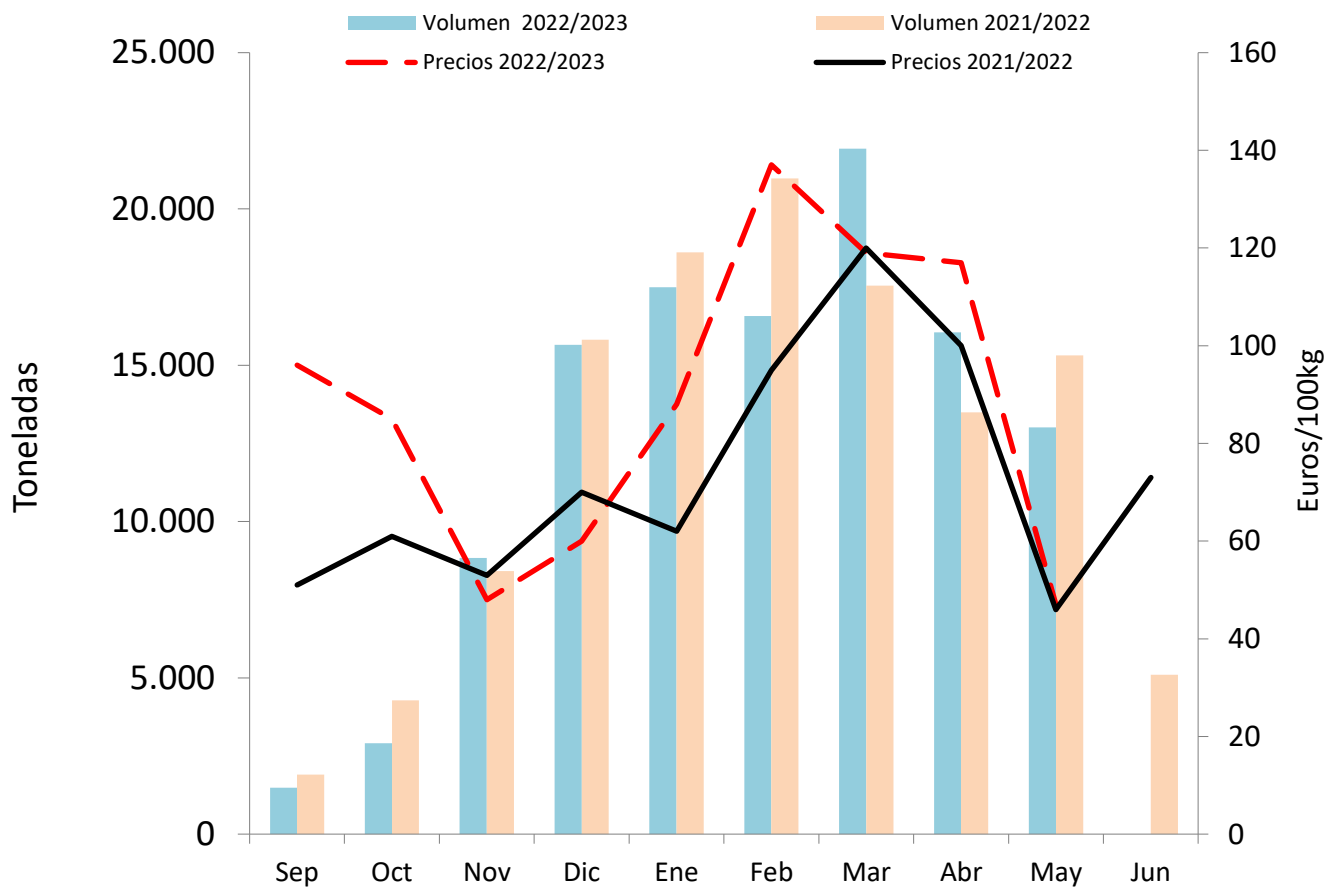
# Balance of the winter campaign



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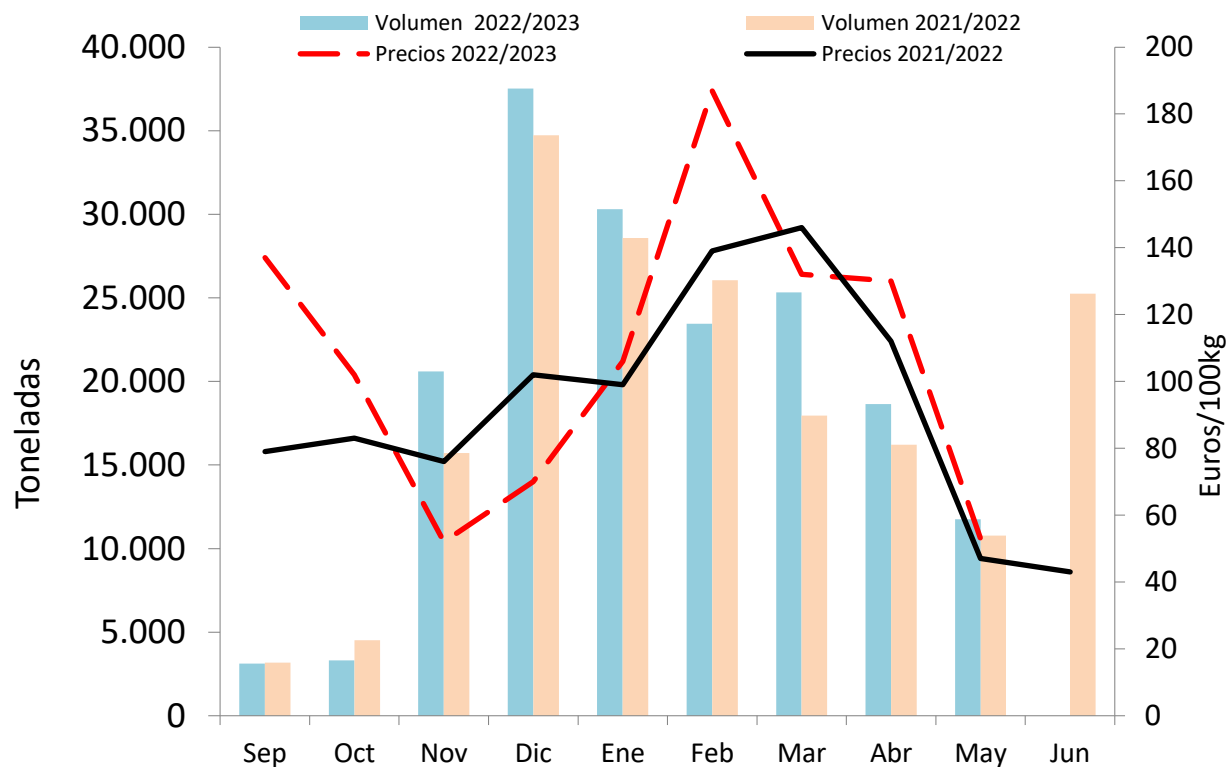
## TOMATE ROUND



# Balance of the winter campaign



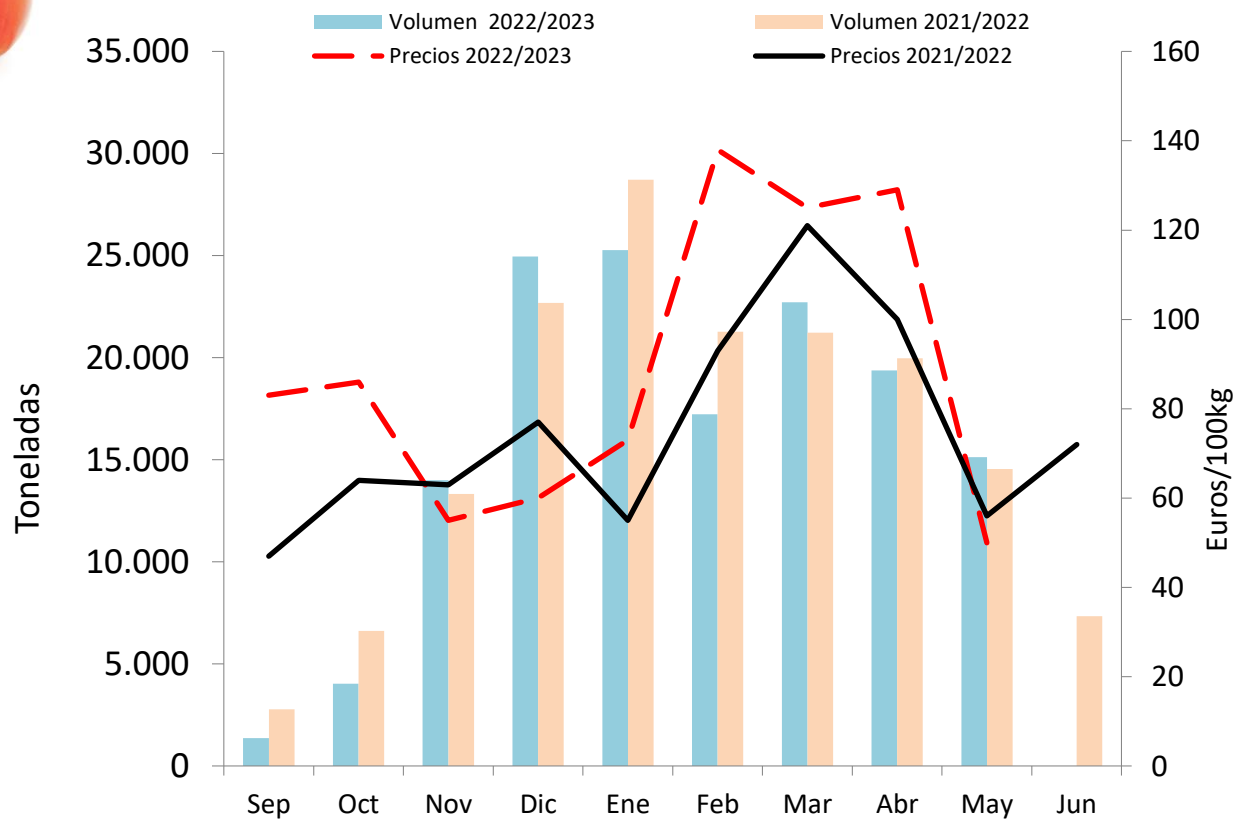
## TOMATE RAMA



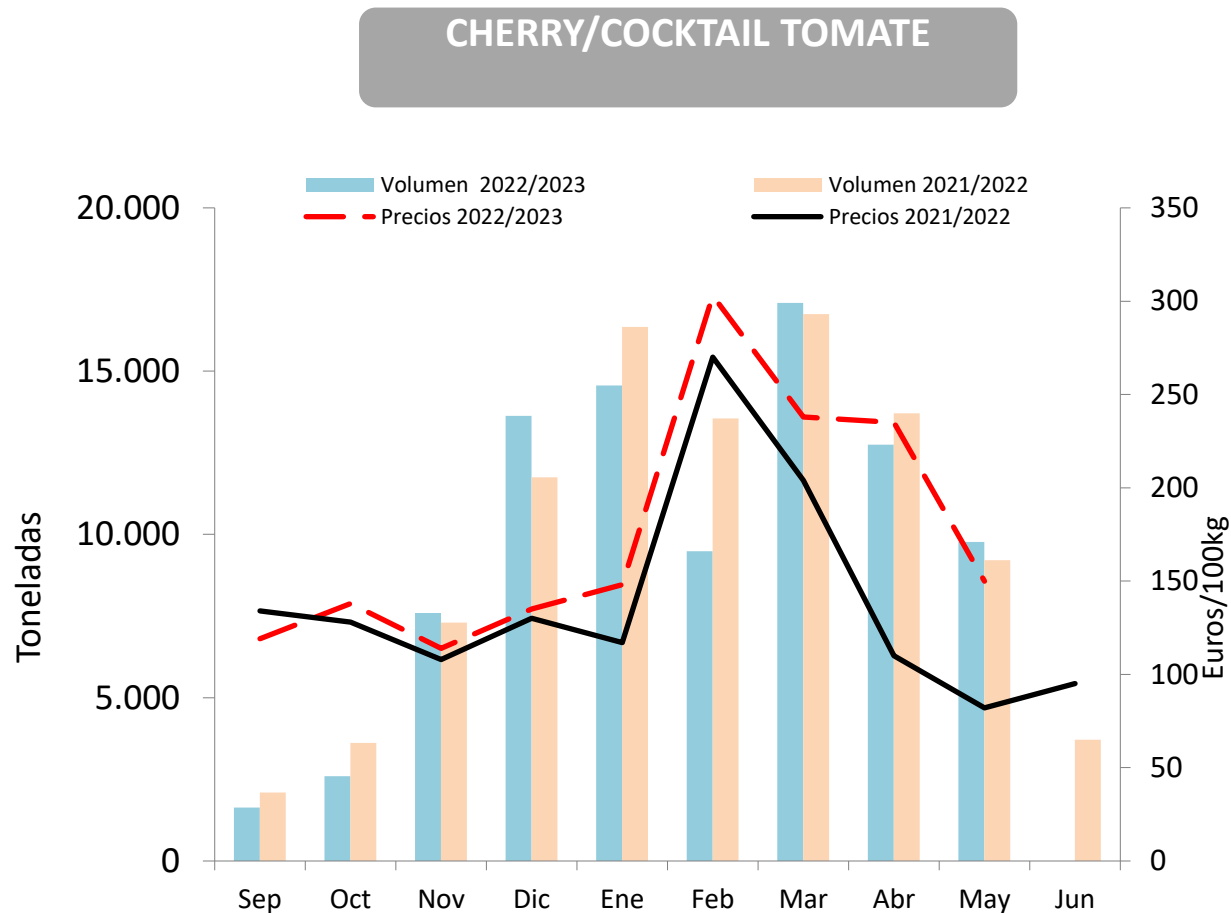
# Balance of the winter campaign



## OBLONG TOMATO

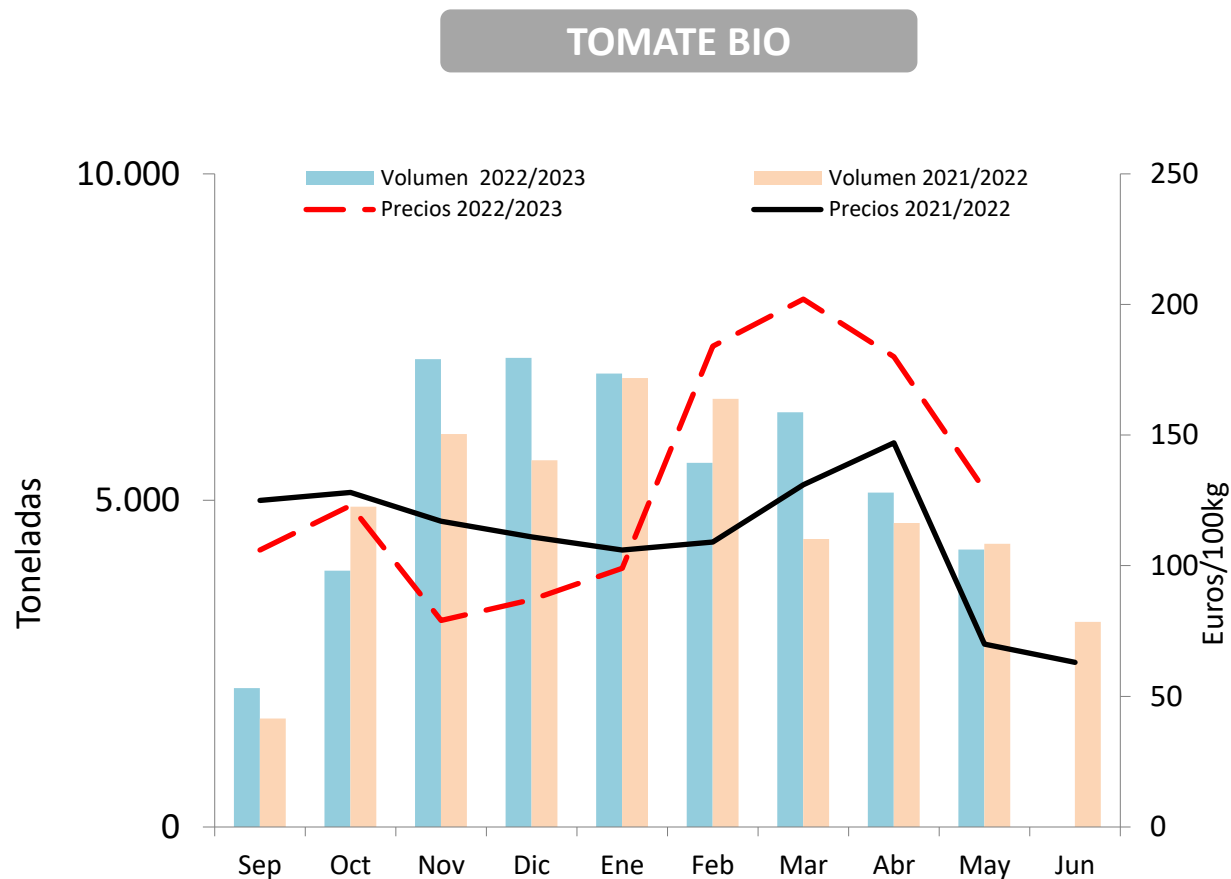


# Balance of the winter campaign



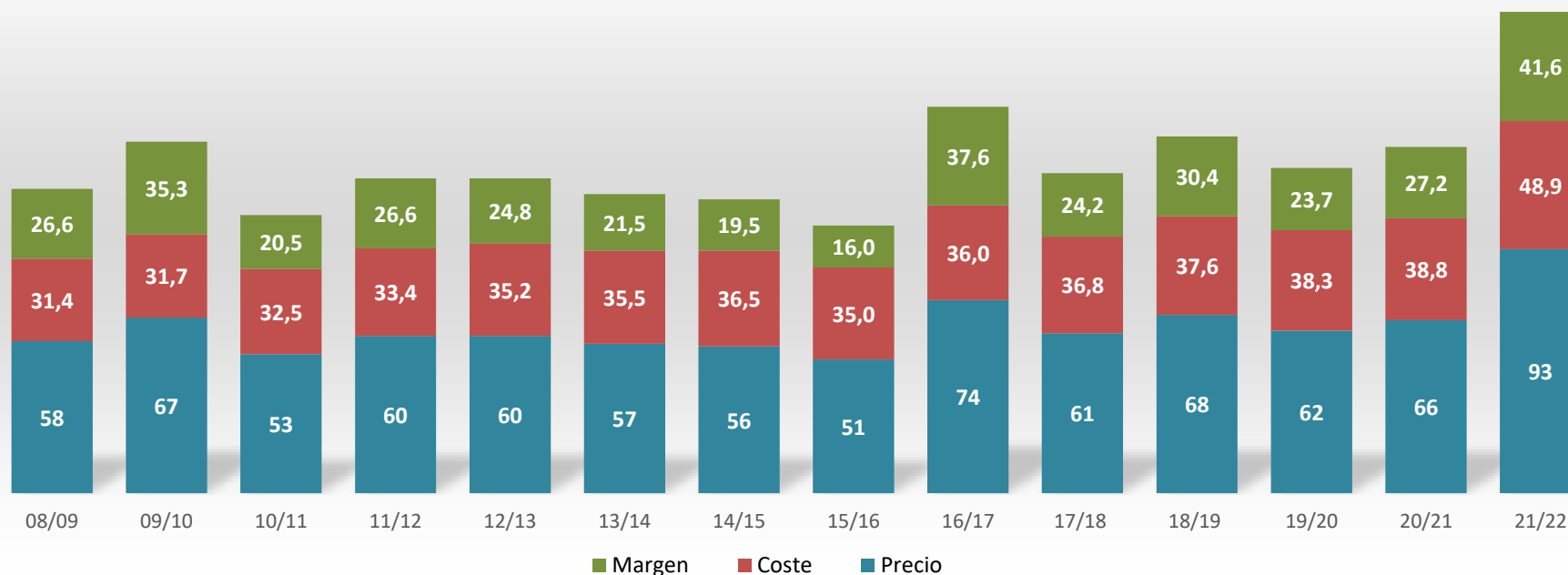


# Balance of the winter campaign



# Balance of the winter campaign

Tomato. Evolution of price, cost and profit (€ / 100 Kg)



COMPARATIVA	PRECIOS	COSTE	MARGEN
Campaña 2021/2022 compared previous season	41%	26%	53%
2021/2022 compared to the average 3 previous	26%	16%	35%
2021/2022 compared to the average 5 previous	33%	22%	41%
Period 2017-2021 compared 2011-2016	13%	8%	22%

**Costs** of tomato have been rising, with a significant increase of 32 % in the last full season (21/22) compared to the previous; and it continues to rise in 22/23.

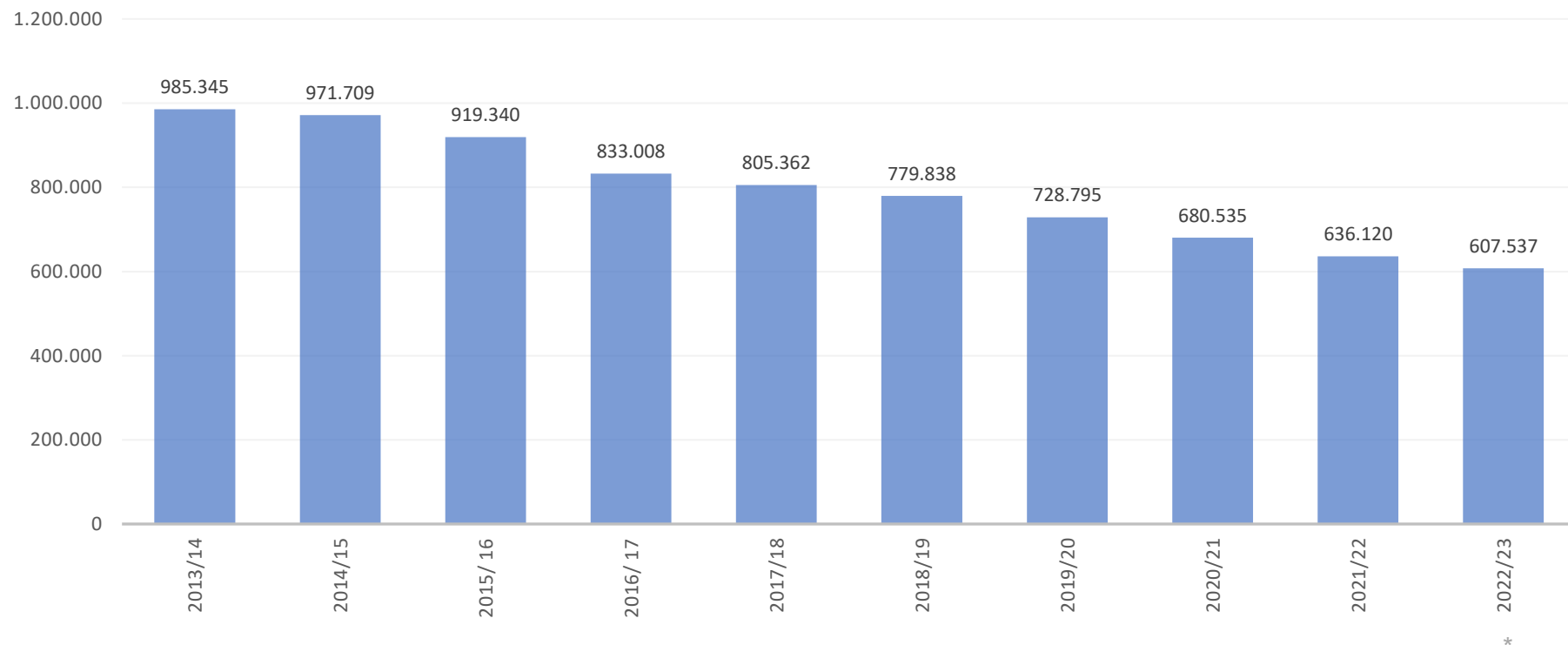
**Prices** trended a downward until 2015/2016, stabilised in the following years, although in the pandemic season they were still below the prices of a decade ago. In the 2021/2022 season, prices are rising sharply, although the current season is still increasing, with an average price of 1.03 €/kg until May.

# Balance of the winter campaign – **COST REVIEW March '23**

<b>COSTES DE PRODUCCIÓN EN CAMPO</b>	<b>TOMATE LARGA VIDA</b>
Semilla +semillero (incluye injertos en caso necesario)	0,787
Fertilizantes	0,687
Fitosanitarios (incluye insectos auxiliares)	0,658
Agua	0,252
Energía (luz finca)	0,486
Gasoil	0,154
Suministros (colmenas, cal, trampas, perchas, rafias, utensilios,etc)	0,219
Servicios externos contratados (asesoría, seguros,...)	0,093
Mano de obra asalariada	1,565
Mano de obra Familiar	1,088
<b>TOTAL COSTES DIRECTOS MEDIOS (€/m²)</b>	<b>5,988</b>
Amortización Invernadero	0,260
Amortización Enarenado/sustrato	0,036
Amortización Plástico	0,364
Amortización Instalación de riego	0,055
Amortización Balsa de riego	0,018
Amortización Edificios (caseta riego, almacén)	0,016
Otras amortizaciones (maquinaria, vehículos...)	0,058
Otros gastos Generales	0,104
Gastos Financieros	0,397
<b>TOTAL COSTES GENERALES, FINANCIEROS Y AMORTIZACIÓN</b>	<b>1,308</b>
<b>TOTAL COSTES MEDIOS DE PRODUCCIÓN (€/m2)</b>	<b>7,296</b>
RENDIMIENTO MEDIO (Kg/m2)	13,5
<b>TOTAL COSTES MEDIOS DE PRODUCCIÓN (€/kg )</b>	<b>0,540</b>
<b>TOTAL COSTES MEDIOS DE PRODUCCIÓN (€/kg ) AÑO PASADO</b>	<b>0,489</b>
<b>VARIACION (€/kg)</b>	<b>0,05</b>
<b>VARIACION (%)</b>	<b>10,5%</b>

# Balance of the winter campaign

## Evolution of tomato exports from Spain



\* Campaña 2022/23. Datos estimados

# Expectation of the summer campaign: Production

## Fresh tomatoes in Spain

**Summer production 2023:** 450.000 tn

**Area 2023:** 7.000 Has

### **Destination of production:**

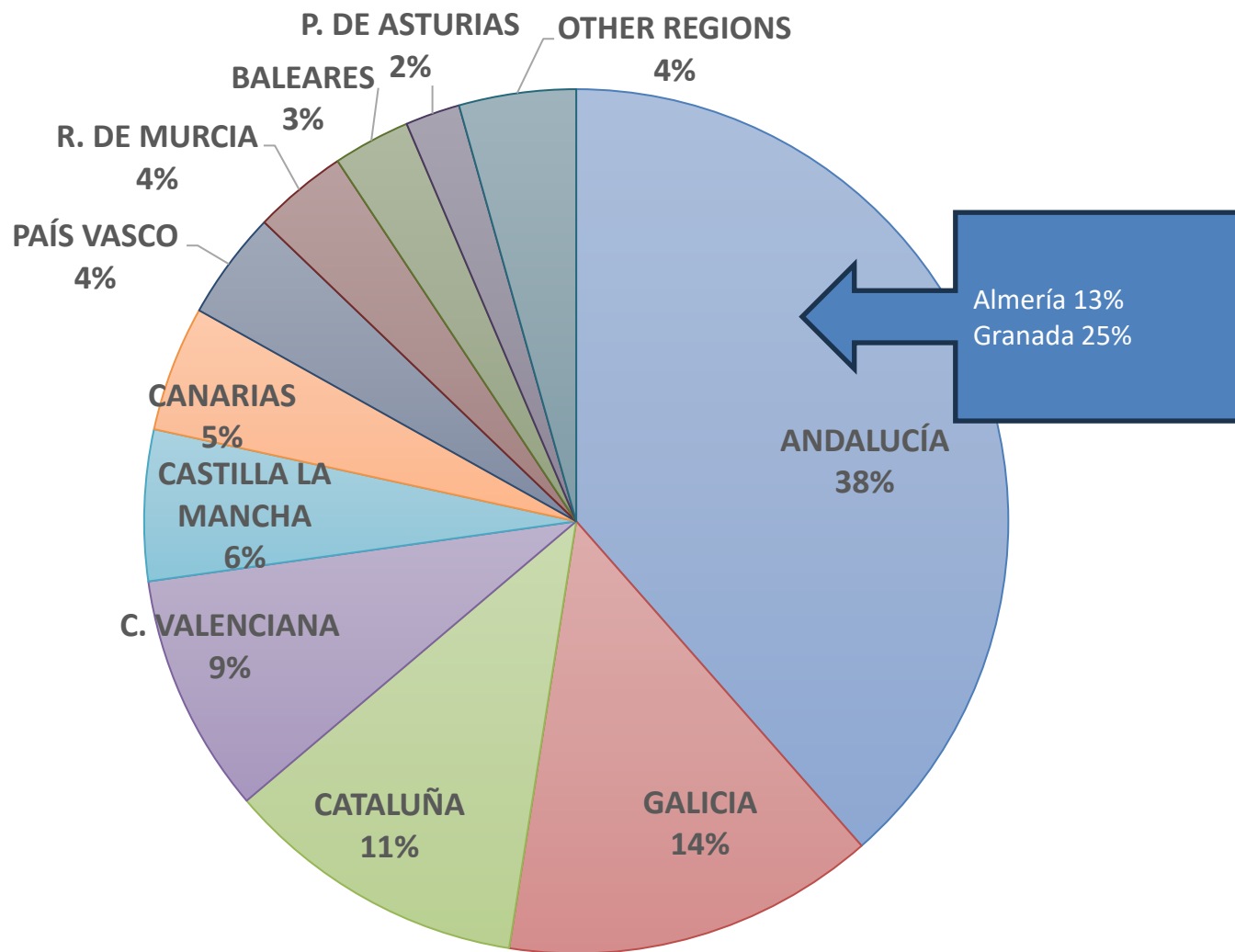
- **Household consumption June-September:** 211.000 tn in 2023 (226.000 tn in 2022)
- **Out-of-home consumption June-September:** forecast 15.000 tn in 2023(15.000 tn in 2022)
- **IV y V range:** 60.000 tn in 2022 (forecast 2023, 65.000tn)
- **Exports:** 87.280 tn in 2022 (forecast 2023, 80.000 tn)

# Expectation of the summer campaign

## Geographical distribution of summer tomato cultivation area

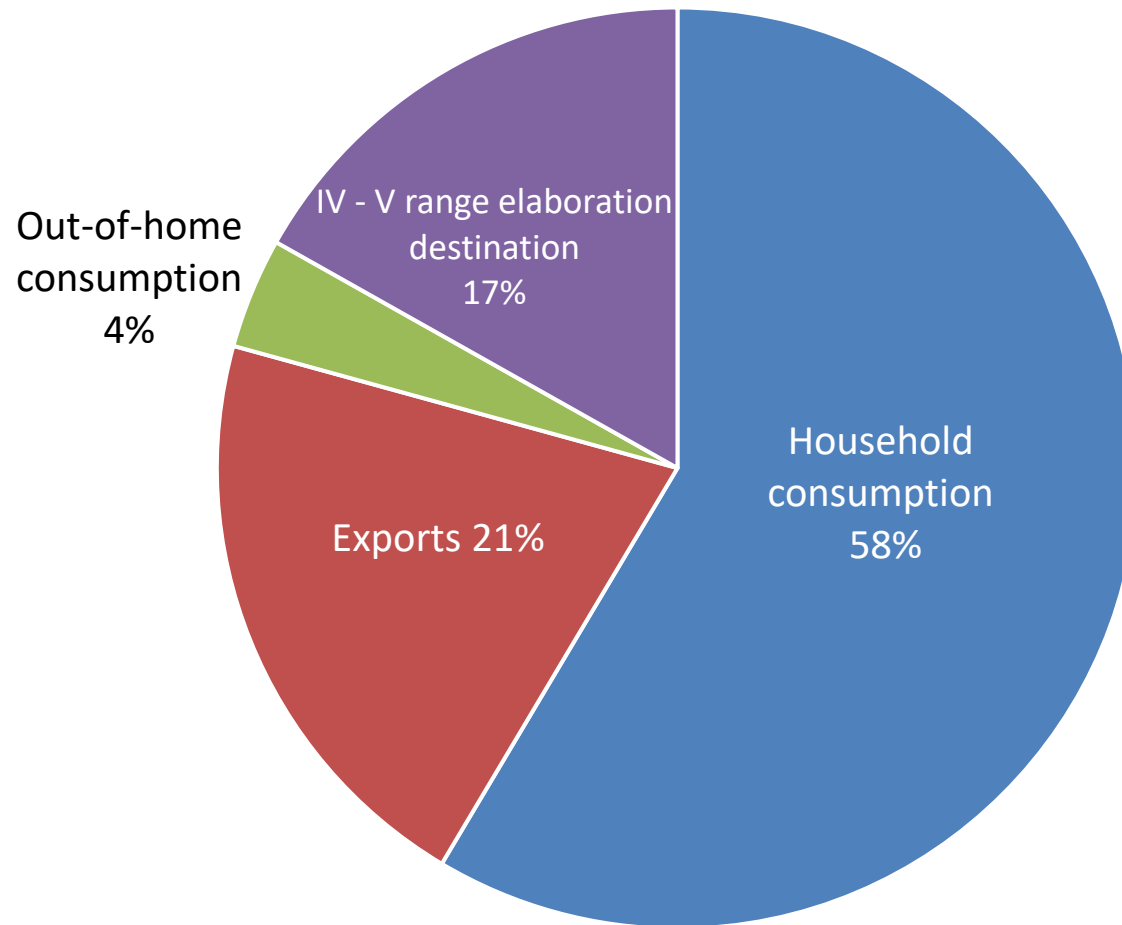
Tomato typology production estimate	
Loose	55%
Vine	20%
Cherry	20%
Organic	5%

DISTRIBUTION FORECASTS BY REGION  
OF SUMMER TOMATO AREA (jun-sep 2023, without canning)



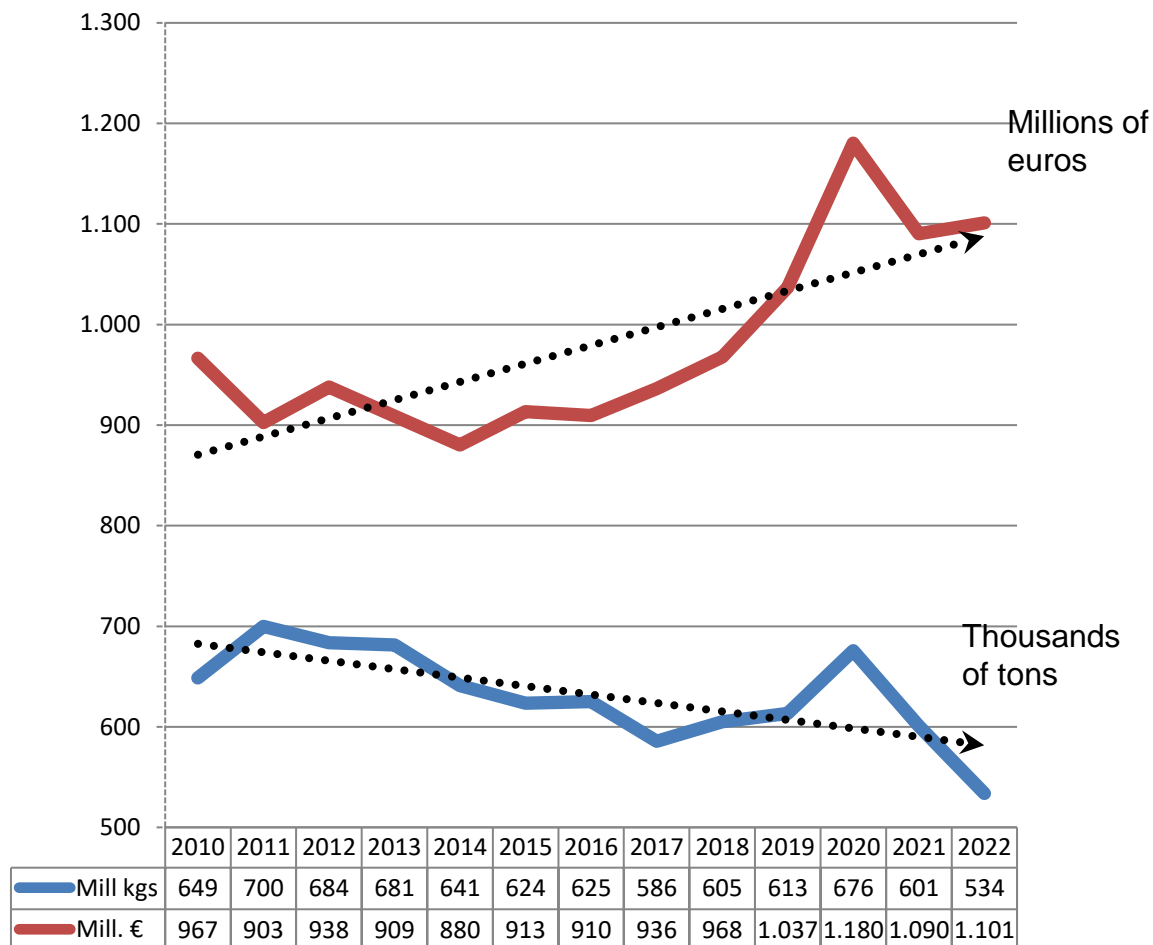
# Evolution of consumers preference and consumption

Summer forecast 2023 production destination



# Evolution of consumers preference and consumption

**EVOLUTION OF ANNUAL CONSUMPTION OF FRESH TOMATO IN SPANISH HOUSEHOLDS**

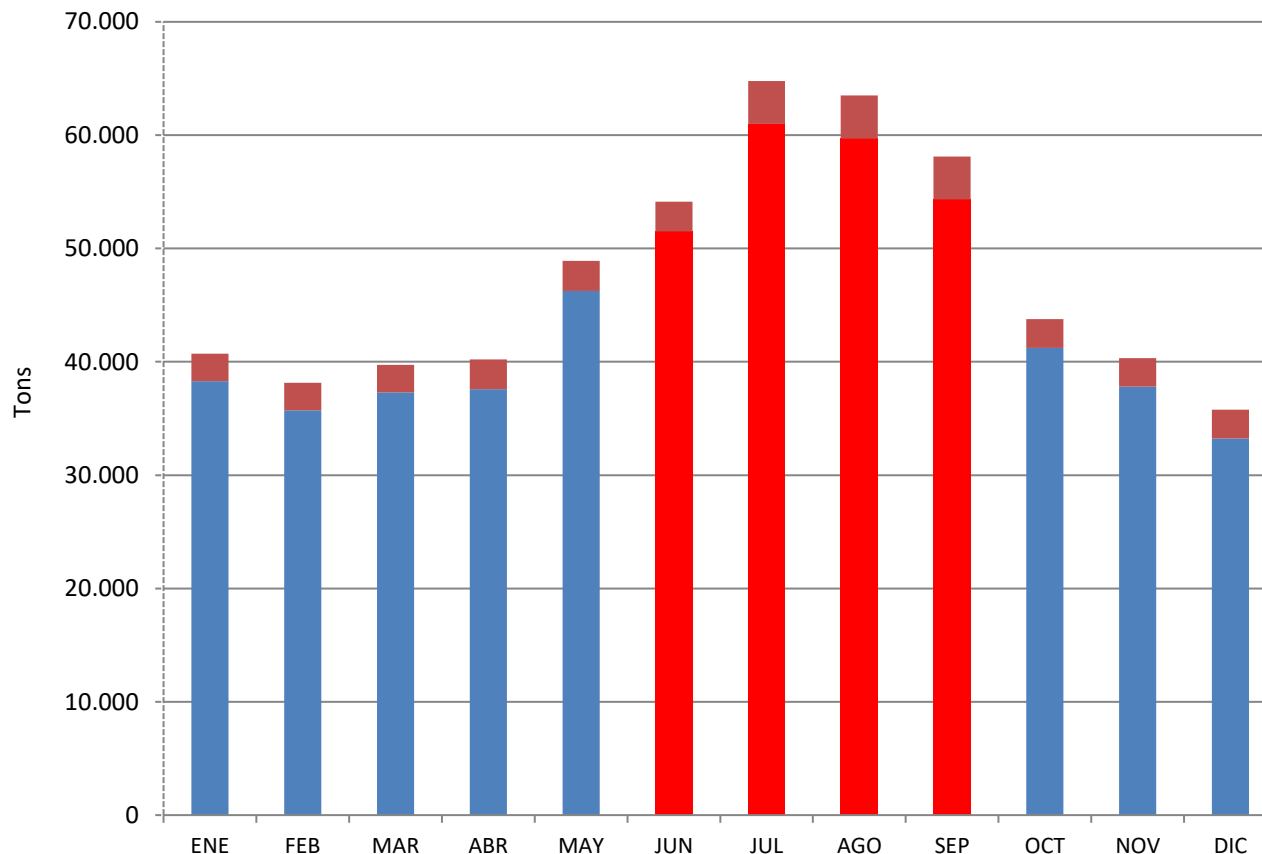


Source: MAPA dec 2022 estimate



# Evolution of consumers preference and consumption

## MONTHLY CONSUMPTION OF TOMATOES IN HOUSEHOLDS AND OUT-OF-HOME IN 2022



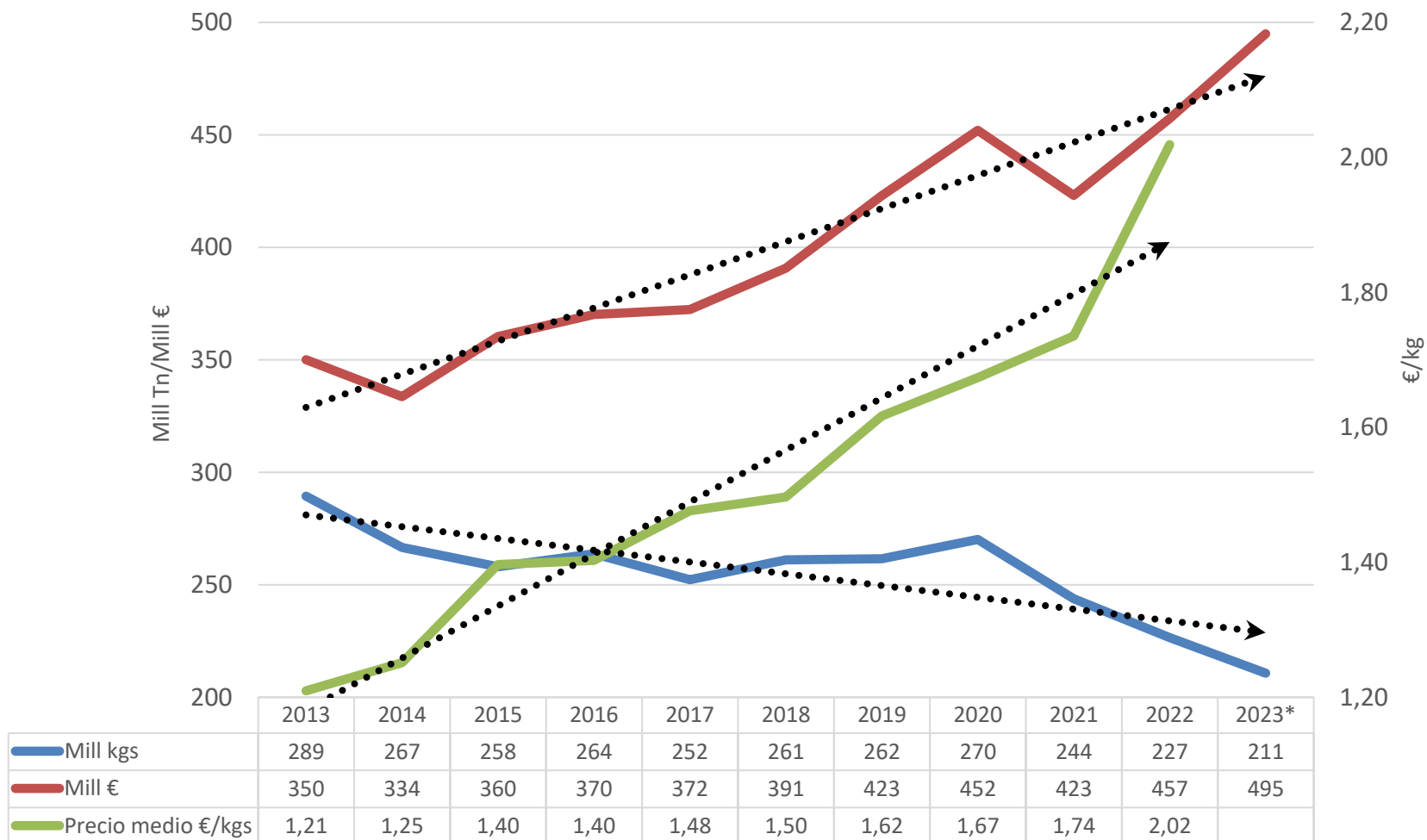
Consumption forecast  
June-September 2023:  
Stability, similar to 2022

Source: MAPA dec 2022 estimate

June-September, period of highest per capita consumption, in households and out-of-home

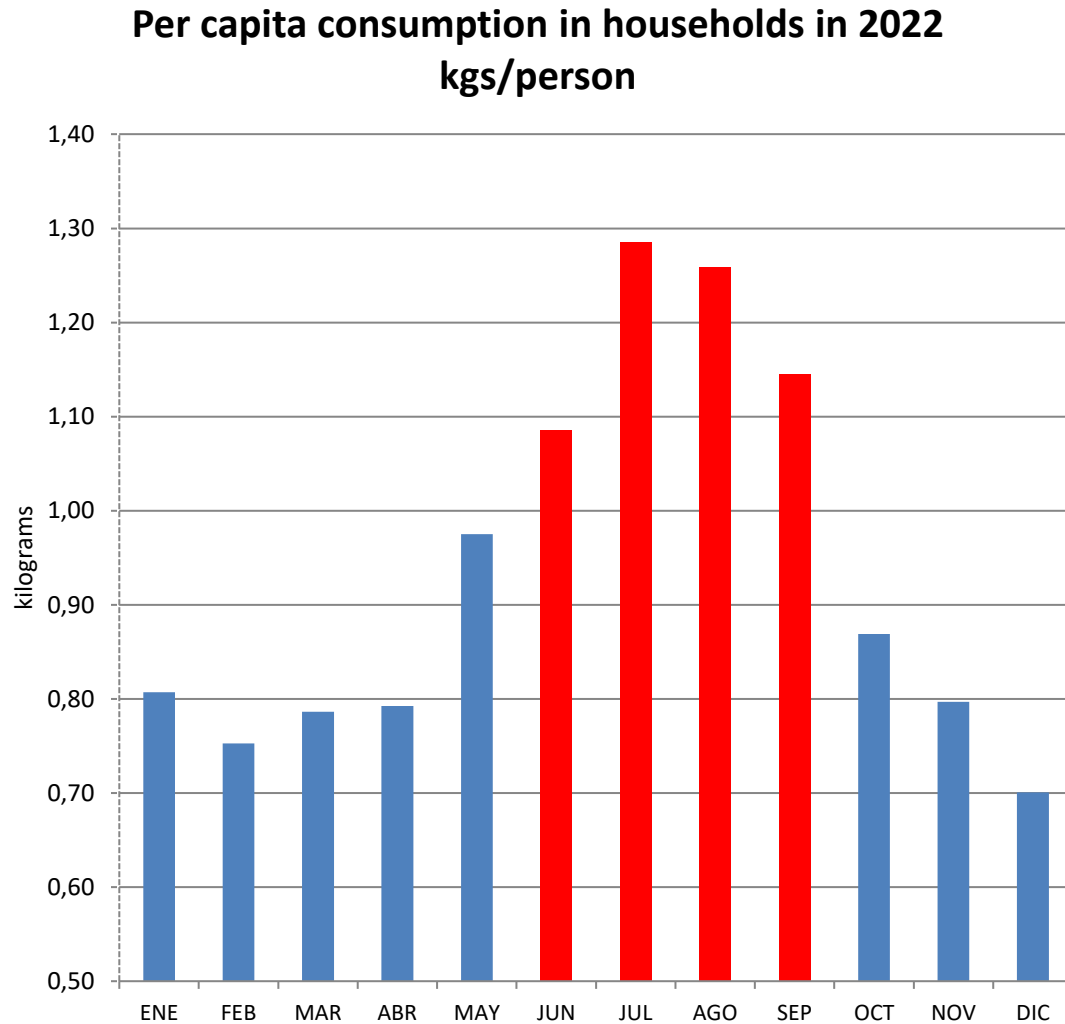
# Evolution of consumers preference and consumption

Evolution of summer tomato consumption in Spanish households  
(june-sept)



Source: MAPA dec 2022 and 2023 estimate

# Evolution of consumers preference and consumption



Source: MAPA dec 2022 estimate

The composition of per capita consumption varies during the summer month: the cherry tomato is reduced and grows round tomato and pear tomato.

# Evolution of consumers preference and consumption

## SUMMER TOMATO CONSUMPTION SPANISH HOUSEHOLDS – 2022 AND FORECAST SUMMER 2023

Summer 2022	june	july	august	september
PER CAPITA CONSUMPTION (kgs/pers)	1,11	1,31	1,29	1,17
PER CAPITA EXPENDITURE (€/pers)	2,24	2,65	2,60	2,37
PENETRATION (%)	81,68	79,66	76,09	75,65
AVERAGE PRICE kg	2,01	2,02	2,02	2,02
VALUE (Thousands Euros)	103.773	122.959	120.628	109.943
VOLUME (Thousands kg)	51.508	60.983	59.701	54.322

Summer 2021	june	july	august	september
PER CAPITA CONSUMPTION (kgs/pers)	1,29	1,52	1,42	1,41
PER CAPITA EXPENDITURE (€/pers)	2,03	2,46	2,30	2,32
PENETRATION (%)	78,30	78,30	78,4	78,50
AVERAGE PRICE kg	1,58	1,62	1,62	1,65
VALUE (Thousands Euros)	94.388	114.043	106.801	107.767
VOLUME (Thousands kg)	59.845	70.499	65.885	65.359

Source: MAPA

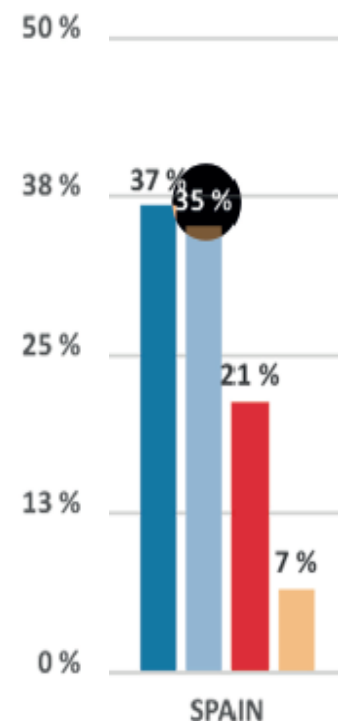
Summer forecast 2023:

Per capita consumption in decline, and higher spending

# Evolution of consumers preference and consumption

## Purchase criteria

Purchase criteria for F&V (2022)



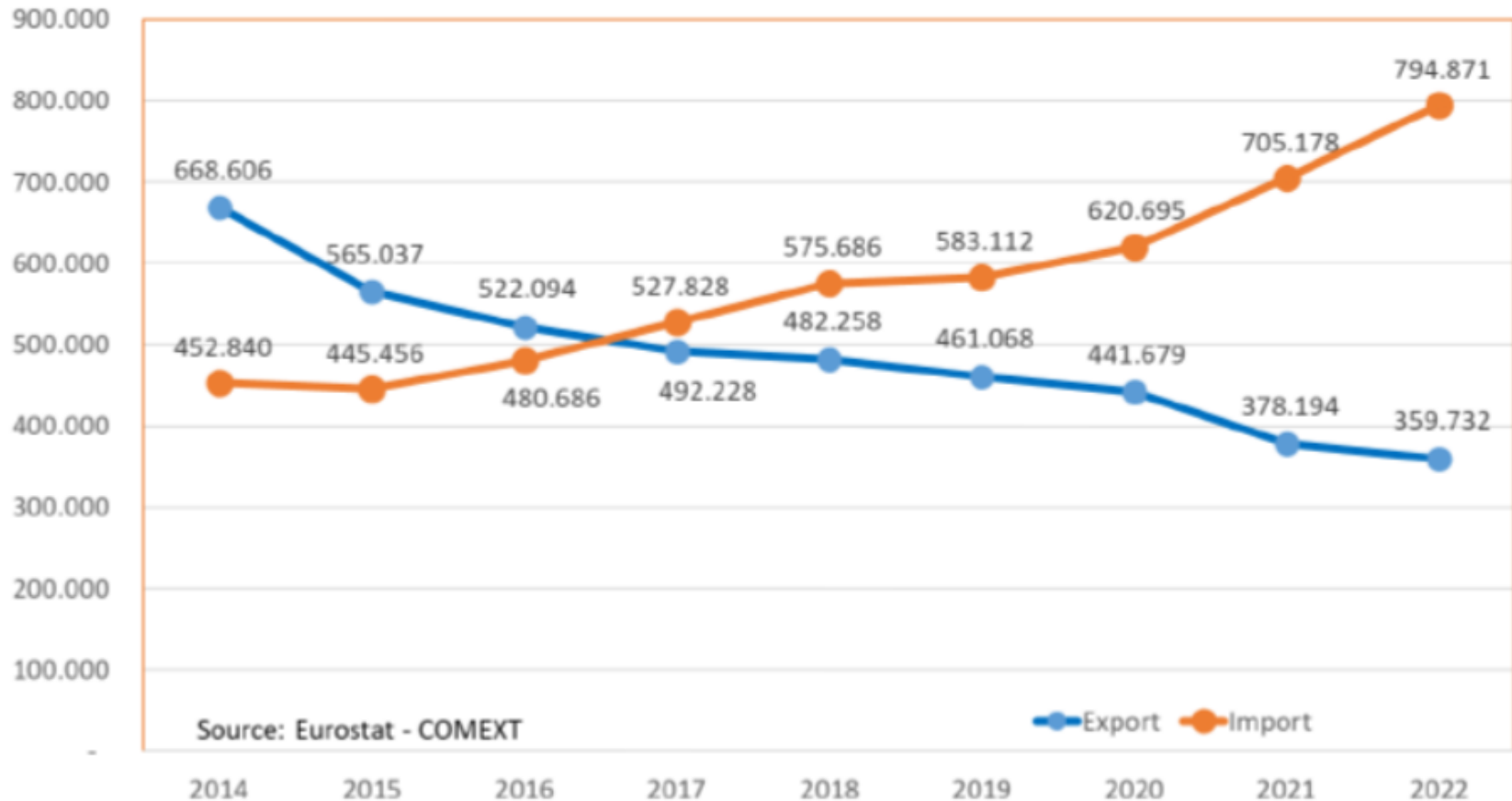
Source: CuTE Healthy Project  
November 2022

# Competitiveness of the other extra-EU suppliers



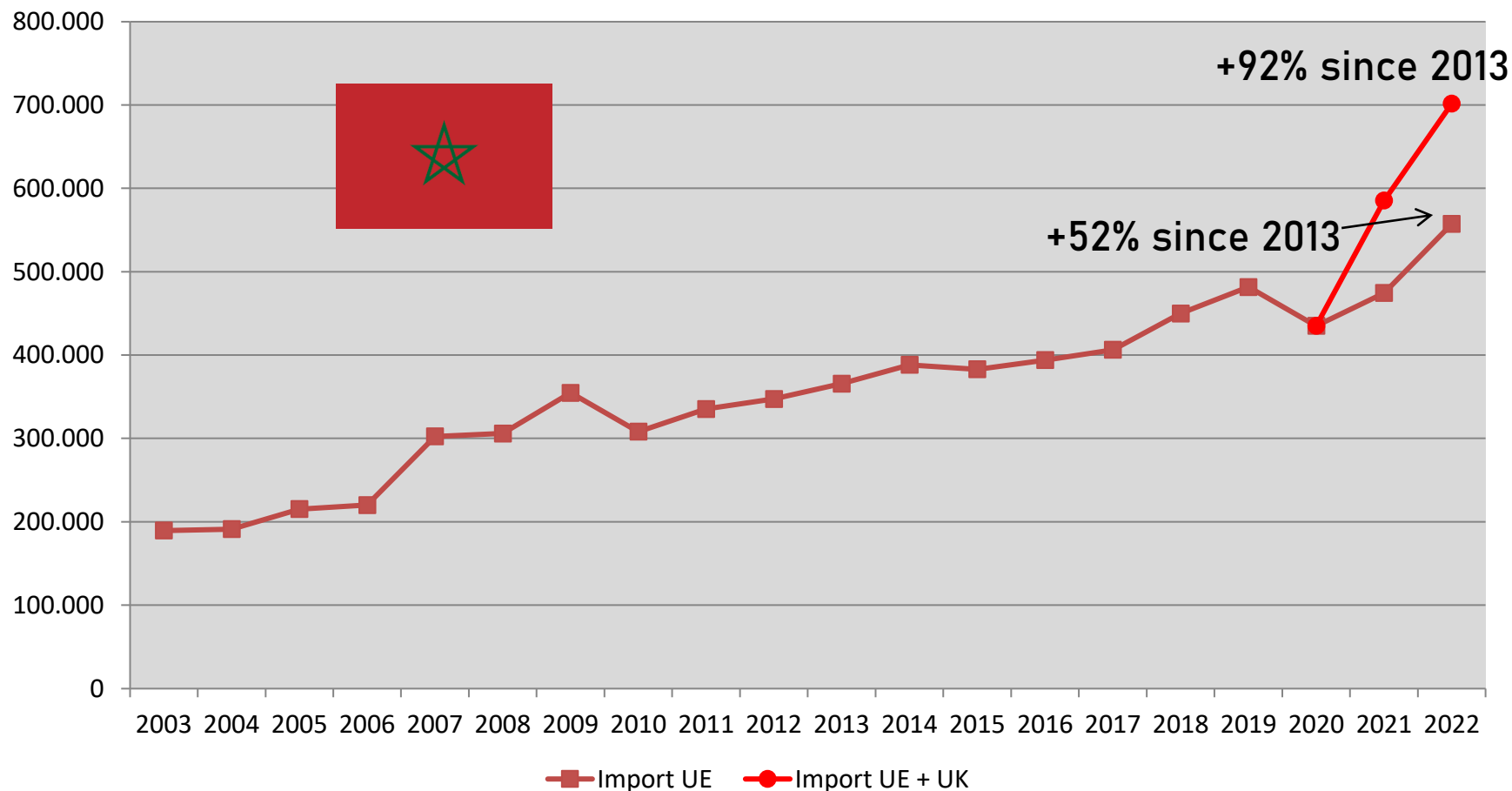
Extra-EU trade of fresh tomatoes

Tonnes



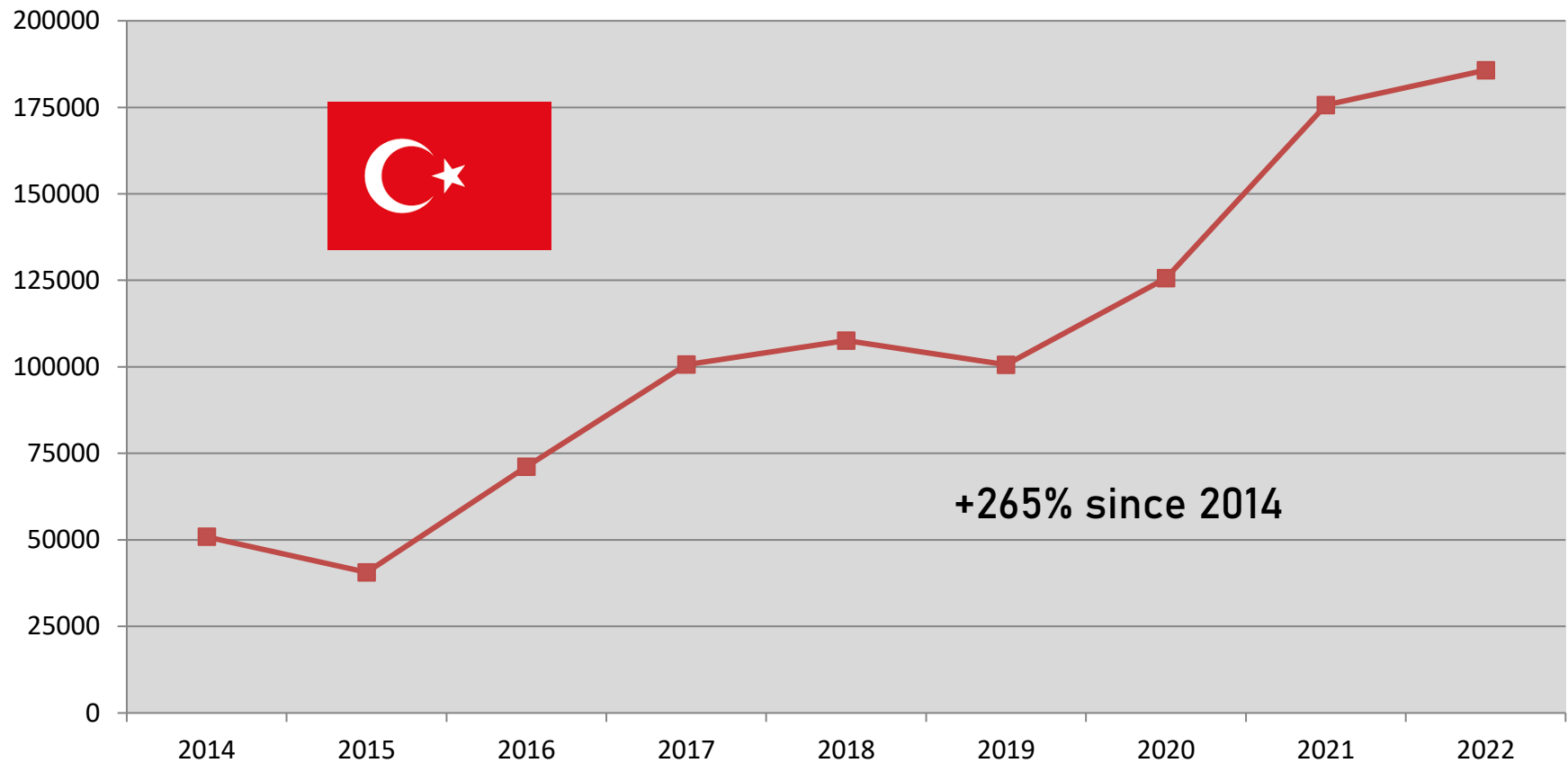
# Competitiveness of the other extra-EU suppliers

## Imports from Morocco



# Competitiveness of the other extra-EU suppliers

## Imports from Turkey





# Competitiveness of the other extra-EU suppliers

→ Increase of production cost in Spain +51% since 2015

No measures to balance the loss of European Markets:

- Extra-EU suppliers: Less requirements in environmental protection, labour costs... → Not included in **trade agreements**
- Public policies: **Plan Maroc Vert & Western Sahara**
- **Entry price system**: not valid (varieties, production costs...)
- No modification of preferential quota after **Brexit**
- No application of **Safeguard measure** (Art. 7)

# Update on the Tomato brown rugose fruit virus (ToBRFV)

- The virus is **present but controlled**
- Situation stabilised in winter production
- **High concern** in case it spreads, as it is general with every virus. No effective tools are available.
- **Exhaustive control measures** are taken: prophylaxis, research for new varieties (possible misleading advertising)...
- Very important in **seeds** (imports).



# Thank you for your attention

