

FORECASTS FOR THE SUMMER CAMPAIGN 2023 IN FRANCE



1- EXPECTATION OF THE SUMMER CAMPAIGN IN TERMS OF PRODUCTION, PRICES, COSTS, PROFITABILITY, SALES AND TRADE

SUMMER PRODUCTION	2020	2021	2022	2023	
Production fresh tomatoes (tonnes)	515768	540525	535830		
% organic	nd	nd			
% non-organic	nd	nd			
% greenhouse (serres et abris hauts)	91	94			
% open field	9	6			
%Round tomatoes	23	20	20		Estimation à partir des achats des ménages (Kantar)
%Vine tomatoes	39	38	40		
%Other tomatoes (cherry, mini-type...)	38	42	40		
% destined to national market	90	90			
% destined to exports EU	8	8			
% destined to exports non-EU	2	2			
Surface fresh tomatoes (ha)	2824	2668	2795		
% organic	17	30			Surfaces d'après Agence Bio
% non-organic	83	70			
% greenhouse (serres et abris hauts)	73	77			
% open field	27	23			
%Round tomatoes					
%Vine tomatoes					
%Other tomatoes (cherry, mini-type...)					
% destined to national market					
% destined to exports EU					
% destined to exports non-EU					

Production forecasts 2023

- Stable volumes for 2023
- Cherry and vine tomatoes forecast : slight increase for 2023
- Ribbed tomatoes forecast : more noticeable increase for 2023
- Cocktail Tomatoes: slight decrease

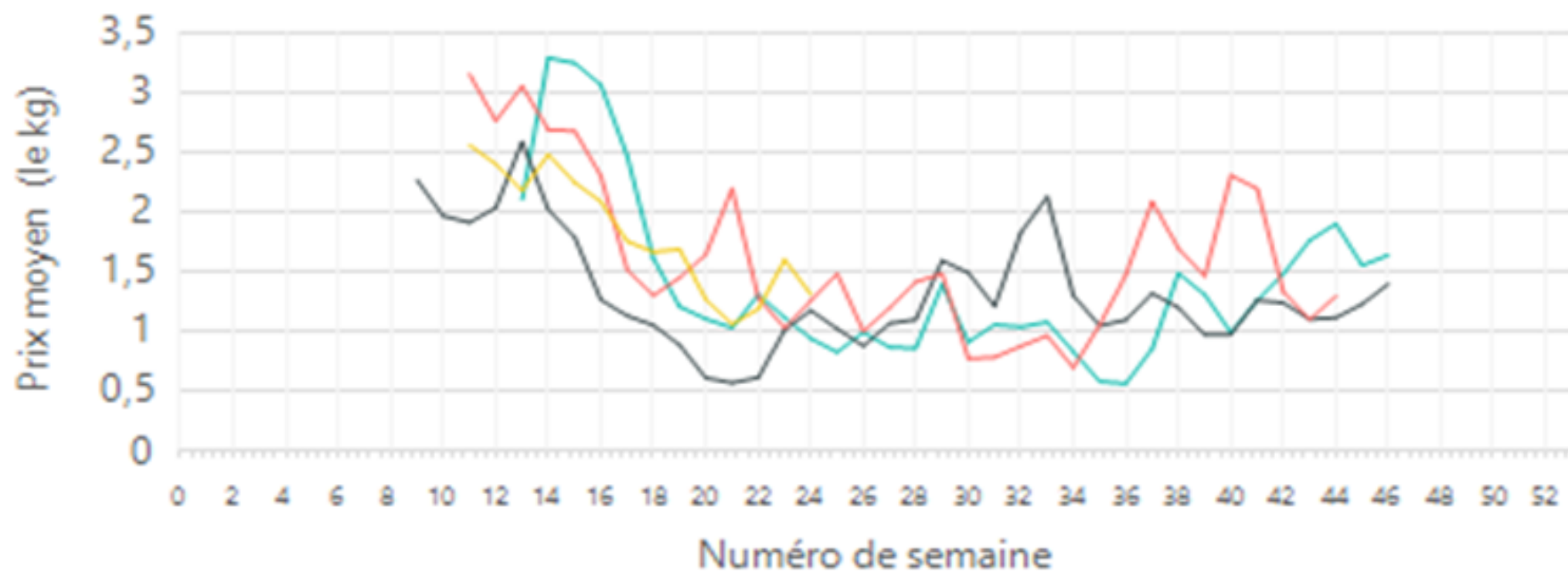
Events 2023

- **Drought:** impact in Pyrénées-Orientales
- Moderate increase in volume at the start of the season due to **lack of light**
- **Price levels** that are too high in stores are observed
- Persistence of the supply of **Maroccan products** on the stores: particularly first-price cherry tomatoes directly competing with the french supply

Prix Expédition

TOMATE ronde Bretagne grappe extra colis 10kg

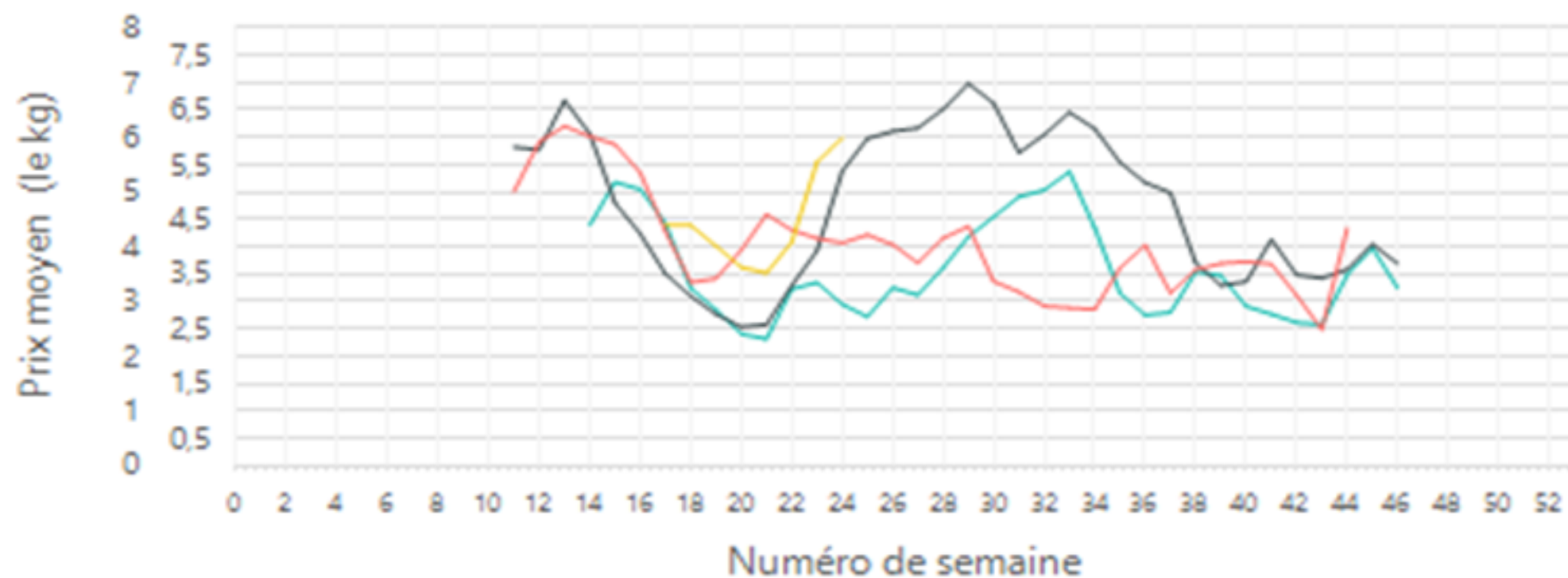
— 2020 — 2021 — 2022 — 2023



Prix Expédition

TOMATE cerise Bretagne extra barq.250g

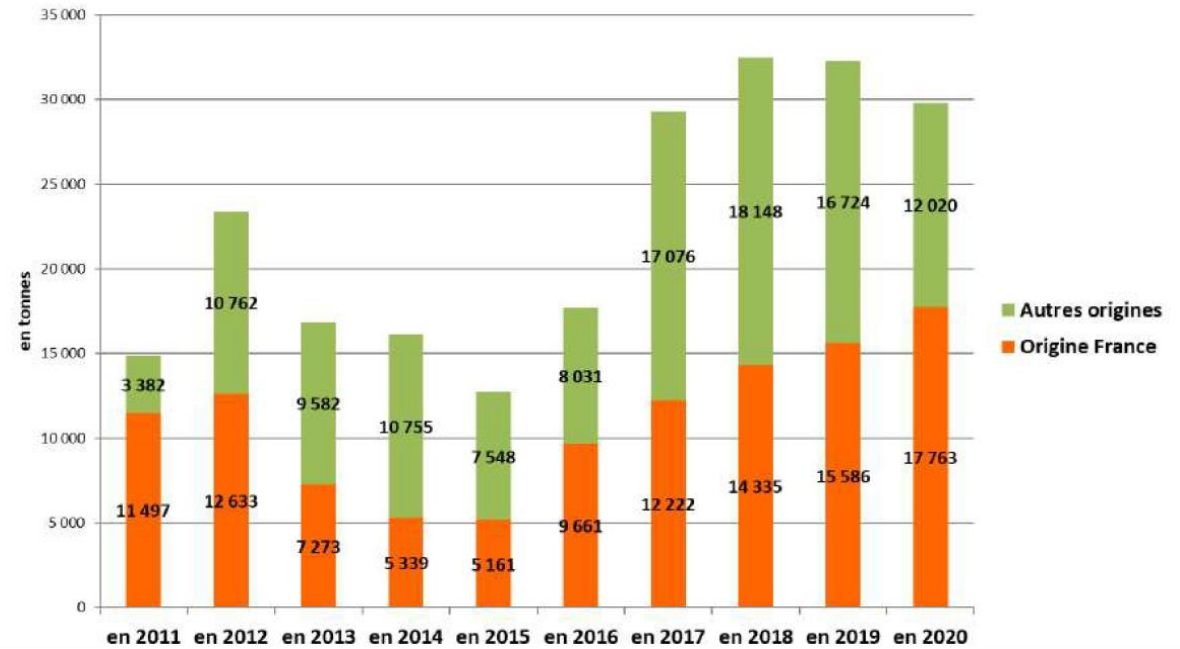
— 2020 — 2021 — 2022 — 2023



Organic Tomatoes

- Since 2019, the market of organic products from heated greenhouses has been regulated: the heating of greenhouses in organic production is authorized, However, the sale of organic products from heated greenhouses is not authorized between December 21 and April 30.
- From 2025, the heating of organic production greenhouses will have to be done only with renewable energies

Tomates bio : évolution des volumes mis en marché entre 2011 et 2020



This is a law that applies only in France.

It is therefore possible to find imported organic tomatoes from heated greenhouses on the French market before April 30,

2- EVOLUTION OF CONSUMERS PREFERENCE AND CONSUMPTION

Consumption 2022

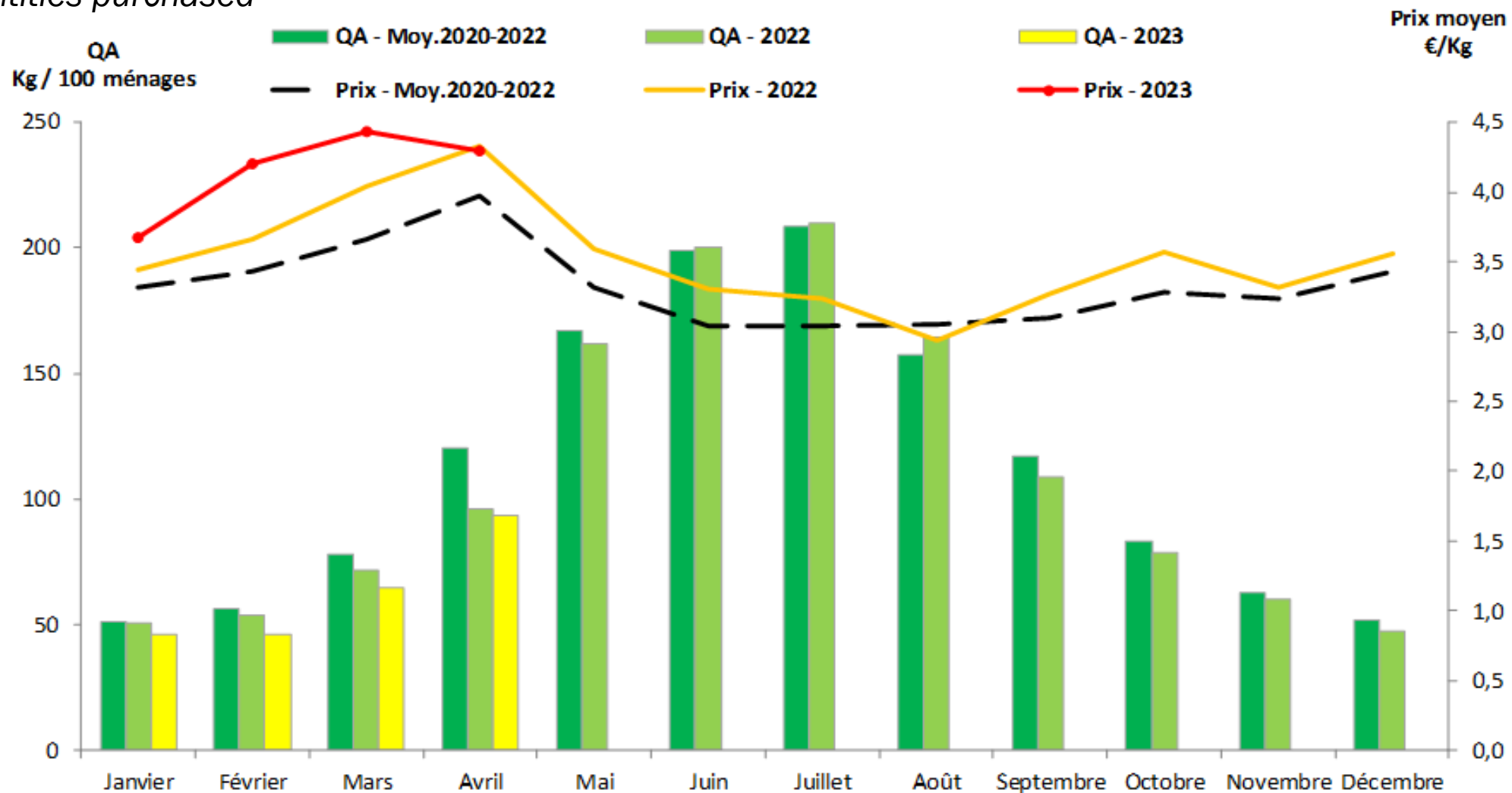
	2021	2022	Moy. 4 ans
Number of buyers (%)	96,3	96,0	95,8
Quantity/buyer (kg)	14,4	13,6	14,2
Fréquency	18,4	17,9	18
Quantity purchased (kg)	0,78	0,76	0,78
Average price	3,22	3,49	3,22

- Quantities purchased/buyer decreasing followed by a decrease in the frequency of purchases
- A slight decrease in customer size in 2022.
- Declining volumes, offset by sums spent at the highest level, a consequence of the high inflation of the average price.
- Pre-packaged continues to develop by recruiting new buyers unlike bulk.
- Organic is seeing a important decline in 2022.
- All targets except seniors have reduced their purchases compared to the average

Quantities purchased

Tomate - Achats des ménages en volume

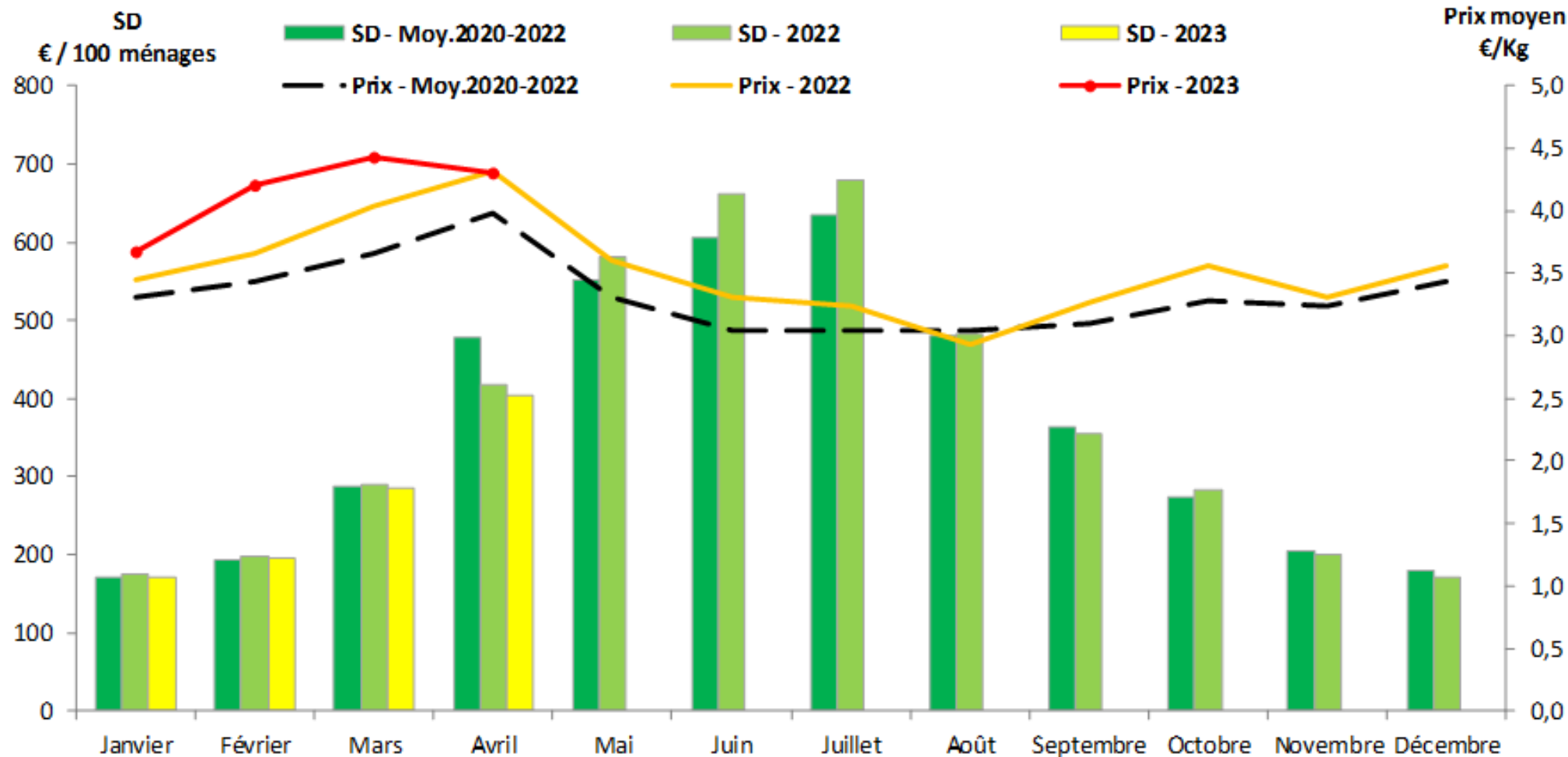
Average price



Amount spent

Tomate - Achats des ménages en valeur

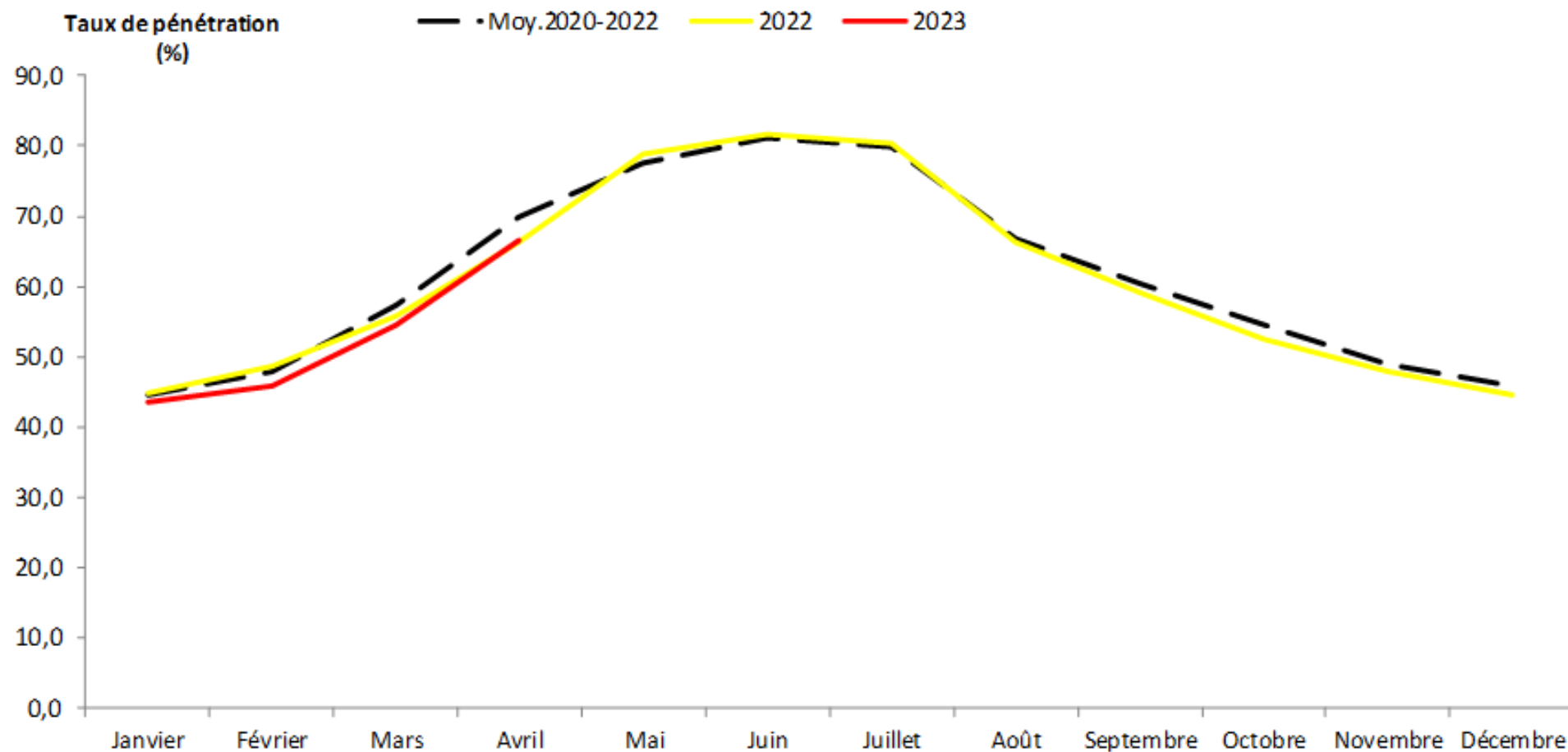
Average price



Source : Kantar ; Elaboration : CTIFL

Tomate - Taux de pénétration des ménages

% of buyer households



Source : Kantar ; Elaboration : CTIFL

Janvier 2023=> avril 2023

Tomate - Cumul de janvier à avril	Quantity purchased QA/100	Amount spent SD/100	Average price Prix moyen
2020	315,9	1 155,6	3,66
2021	330,5	1 150,8	3,48
2022	272,9	1 079,7	3,96
2023	251,0	1 054,2	4,20
<i>Moy.2020-2022</i>	<i>306,4</i>	<i>1 128,7</i>	<i>3,68</i>
Evol/2022	-8,0%	-2,4%	6,2%
Evol/moy.2020-2022	-18,1%	-6,6%	14,0%

Source : Kantar

Organic continues to lose buyers, this effect is accentuated by inflation in 2022 (comparison 2022/2021)

Tomatoes	% buyers	Frequency	Quantities purchased	Average price
organic 2021	26 %	3,7	0,71	4,36
organic 2022	23,4%	3,7	0,73	4,43
non organic 2021	95,5%	17,6	0,78	3,16
non organic 2022	95,2%	17,2	0,76	3,39

Source Interfel sur la base de Kantar

3- COMPETITIVENESS OF THE OTHER EXTRA-EU SUPPLIERS

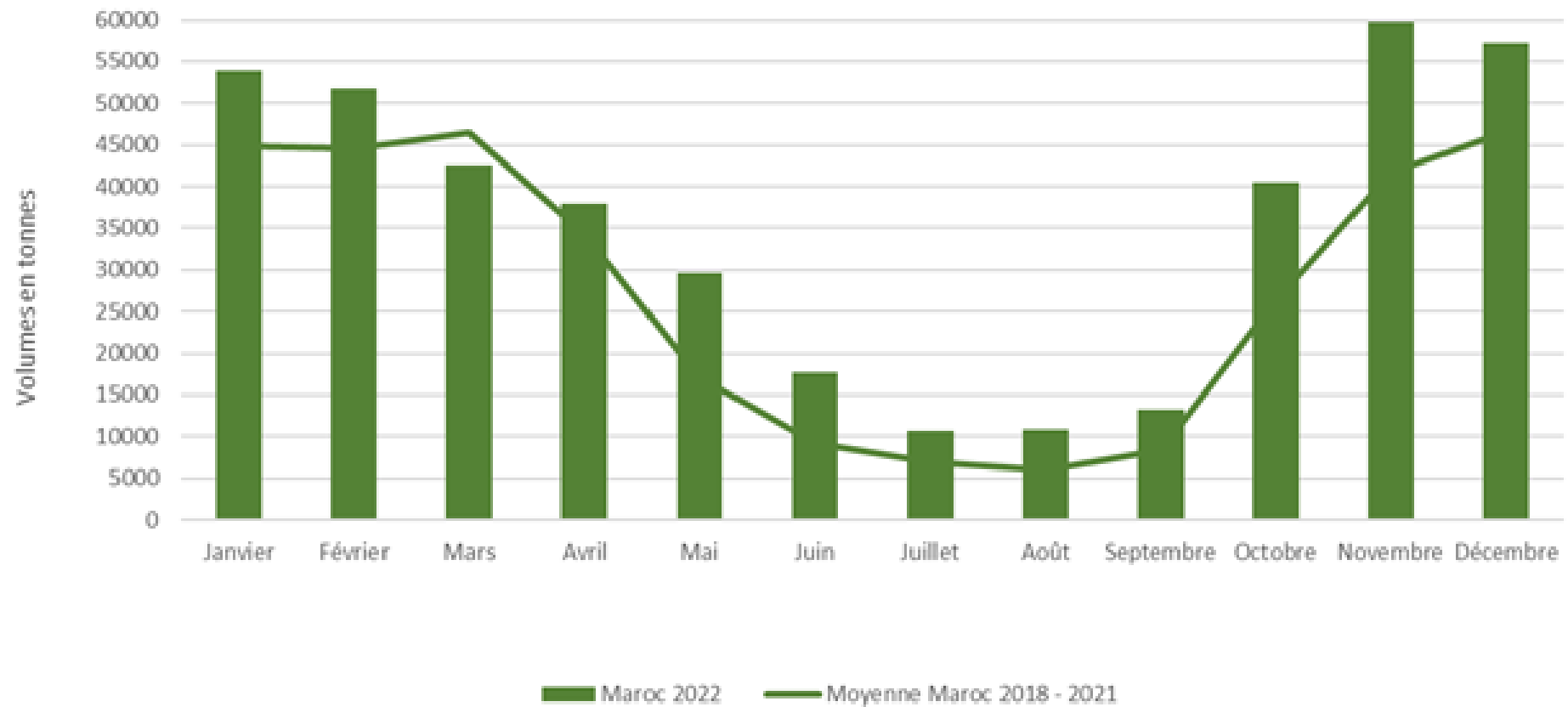
In 2022, Morocco became the 3rd exporter of tomatoes, with the highest increase in exports in one year (+17%) among all producing countries.

On the French market, Moroccan tomatoes represent 63% of imported volumes

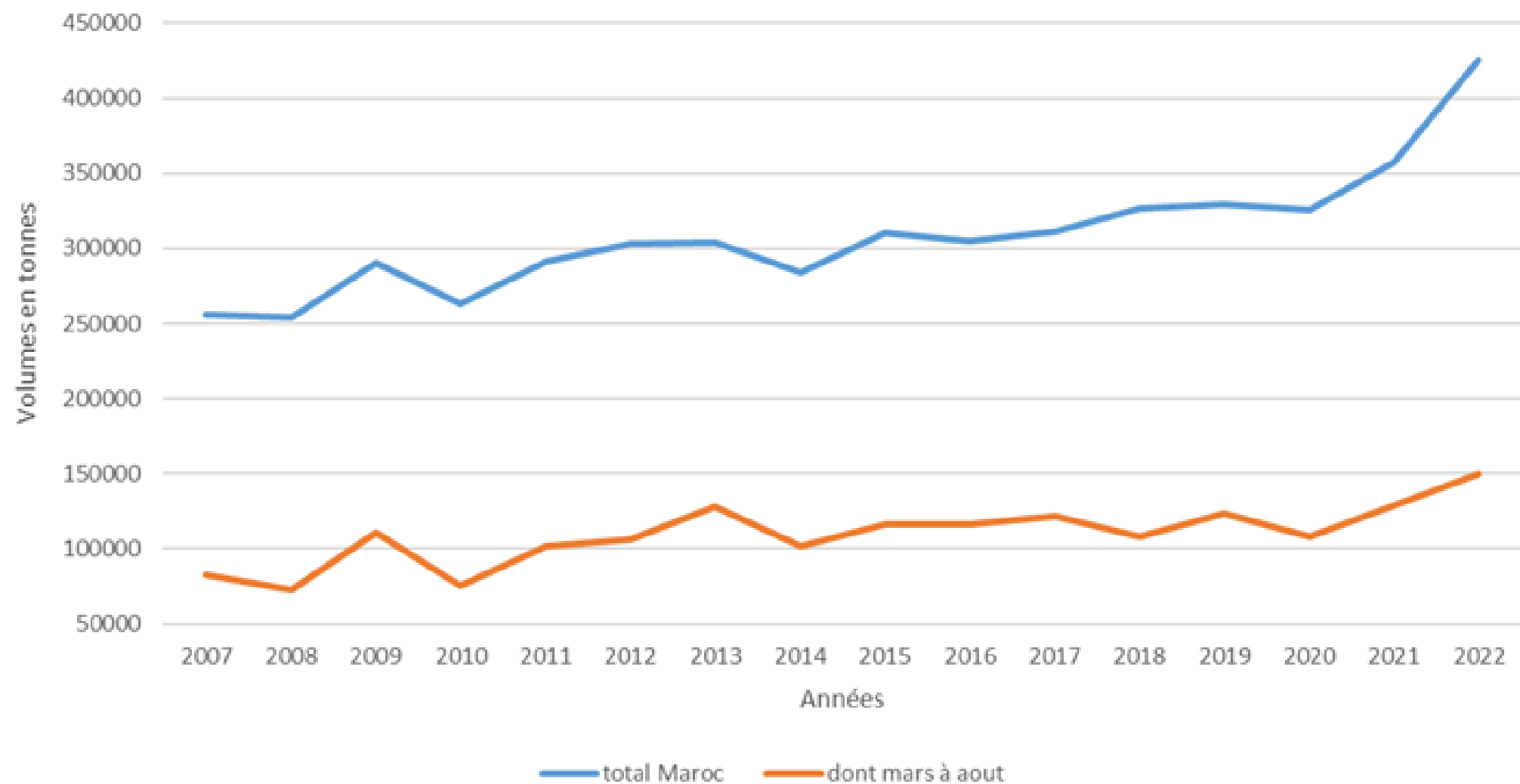
In 2022, tomato exports to France were 425,552 tons compared to 357,118 in 2021. An exponential increase of 19.16% year on year!

Evolution mensuelle des importations françaises de tomates fraîches origine Maroc en 2022 (en tonnes)

Source : douanes françaises



Import Tomates origine Maroc (Douanes françaises)



Cost of labor

Pays	Salaire brut horaire	Coût horaire chargé employeur	Ecart avec la France	Ecart en pourcentage avec la France
France	11,52 €	13,64 € (entreprise -11 salariés)		
Maroc	0,69 €	0,74 €	-12,9 €	-1743 %

Moroccan competition in french supermarkets

Exemple dans les supermarchés en France...



0,99 euros/250g

Barquette de tomates cerises allongées
« origine Maroc »



0,99 euros/200g

Barquette de tomates cerises rondes
« origine France »

Our requests:

1/A study of the impact of the Farm to Fork strategy on the European tomato sector carried out by the Joint Research Center

2/A revision of the European FIC (Food Information to Consumers) regulation for a more visible display of the indication of origin

1/A print of the flag of the producing country with a minimum height of 15 mm and/or written inscription of the origin with a character size of minimum 15 mm height.

2/The mention of the country of origin of the product affixed to the upper side of the packaging of the product (the side most visible on the shelf).

4- UPDATE ON THE TOMATO BROWN RUGOSE FRUIT VIRUS (ToBRFV)

ToBRFV

=> Provisional quarantine pest until 31.12.24

=> 4 official cases in France with plants of Dutch origin on the 4 cases.

=> French producers want to continue the eradication of the virus

Clavibacter

- Greater development this year with many cases in France (30 cases: association of varieties and rootstock)