

**TomatoEurope**

PROCESSORS ASSOCIATION

**Monday, June 19, 2023**  
**Fruit & Vegetable Market Observatory**  
**Sub-group Tomatoes**

**Crop 2023**  
**Tomatoes for processing**  
**Forecast**

## Major producing countries and total world production (final 2022 and forecast 2023 x.000 tons)

	Average 2016/2022	FINAL 2020	FINAL 2021	FINAL 2022	FORECAST 2023	VARIATION 2023 vs 2022	VARIAZIONE 2023 vs average 2016/2022
California	10.054	10.258	9.761	9.514	10.900	12,7%	8,4%
China	5.546	5.800	4.800	6.200	7.300	15,1%	31,6%
Italy	5.297	5.166	6.059	5.476	5.600	2,2%	5,7%
Spain	2.966	2.650	3.185	2.125	2.600	18,3%	-12,3%
Turkey	2.168	2.500	2.200	2.350	2.600	9,6%	19,9%
Brazil	1.447	1.421	1.525	1.632	2.008	18,7%	38,8%
Portugal	1.470	1.262	1.596	1.414	1.500	5,7%	2,0%
Algeria	821	1.000	1.000	1.200	1.350	11,1%	64,5%
Iran	1.240	1.300	1.300	1.300	1.300	0,0%	4,8%
Chile	1.011	907	1.174	971	1.150	15,6%	13,7%
Russia	449	515	523	638	670	4,8%	49,2%
Ukraine	611	800	800	120	600	80,0%	-1,8%
Egypt	374	420	440	456	600	24,0%	60,6%
Argentina	492	454	596	626	586	-6,8%	19,2%
Canada	447	438	399	548	530	-3,4%	18,5%
Tunisia	762	961	940	689	500	-37,8%	-34,4%
USA excluding California	435	463	462	450	450	0,0%	3,4%
Greece	404	420	420	340	440	22,7%	9,0%
Others	2.100	1.655	2.004	1.940	1.906	-1,8%	-9,2%
<b>WORLD</b>	<b>38.107</b>	<b>38.390</b>	<b>39.184</b>	<b>37.989</b>	<b>42.590</b>	<b>10,8%</b>	<b>11,8%</b>

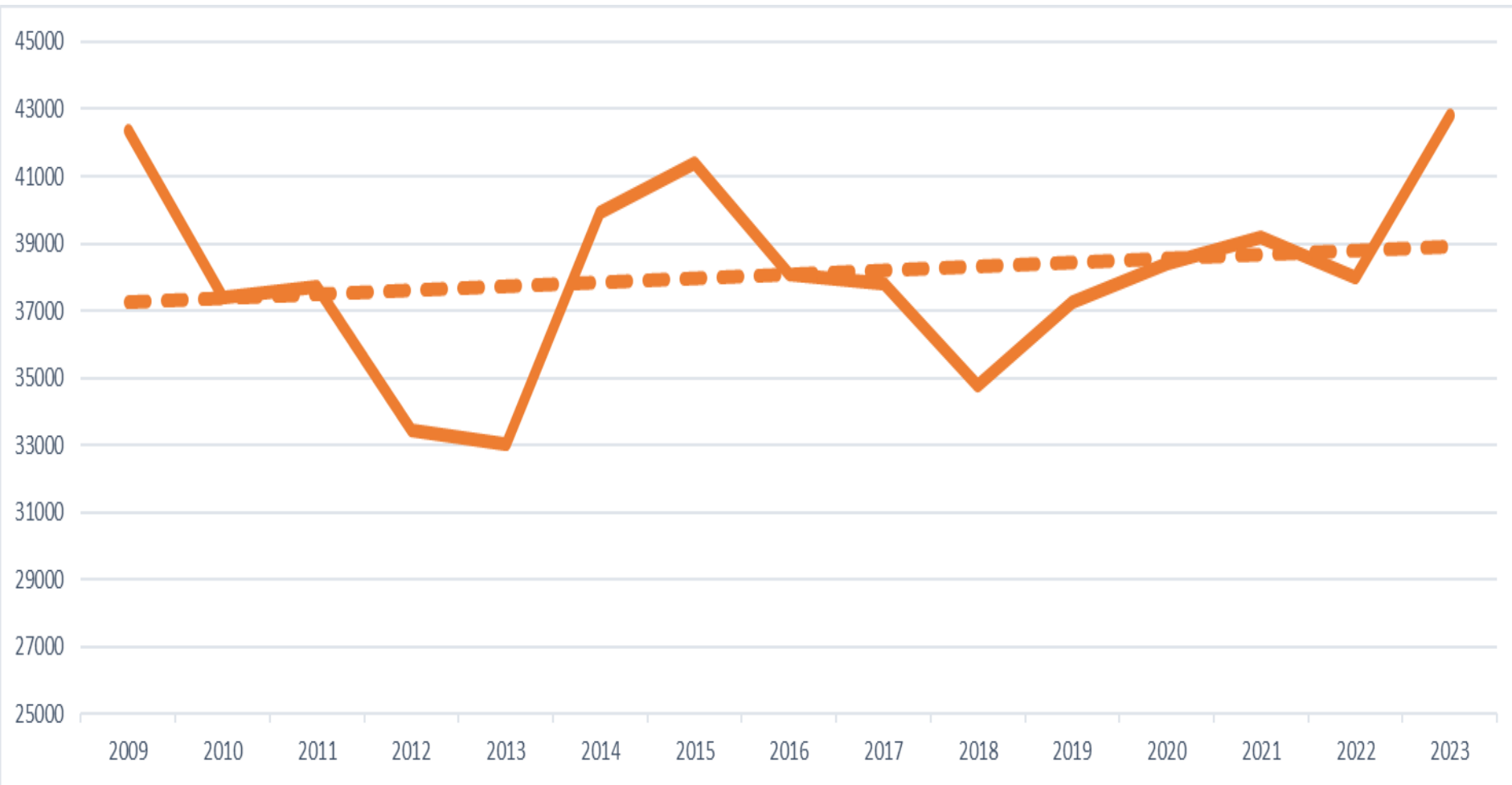
## **World production 2022**

- 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**

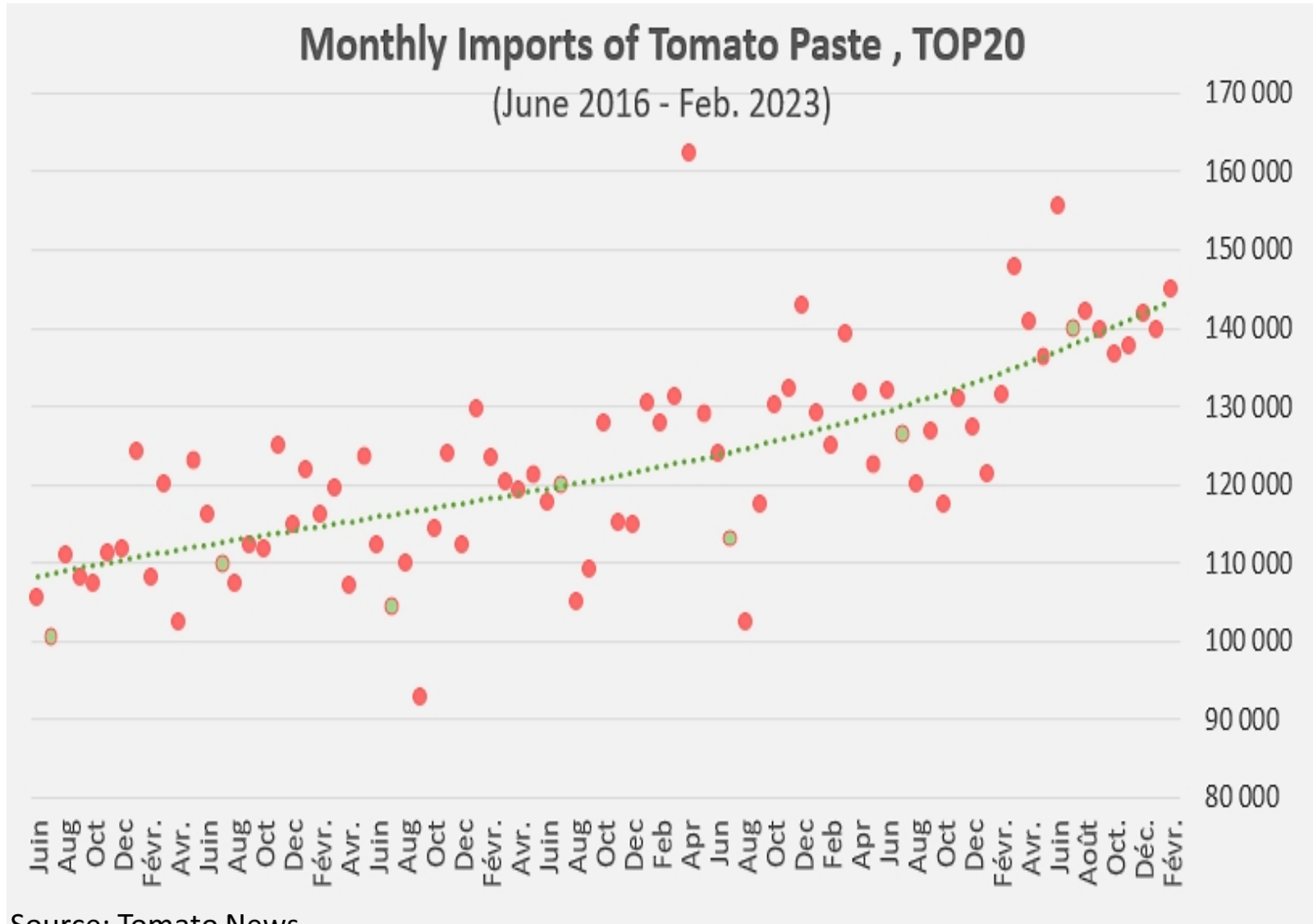
## Forecast 2023

- Very strong recovery of Chinese production, even if still with some uncertainty due to some recent negative climatic phenomena
- European and Californian production returns to "historical" productions
- Ukrainian production is expected to recover partially
- The result is an increase in world production expected to exceed 10% and resume the upward trend interrupted in recent years, signal of a slight but constant increase in consumption worldwide

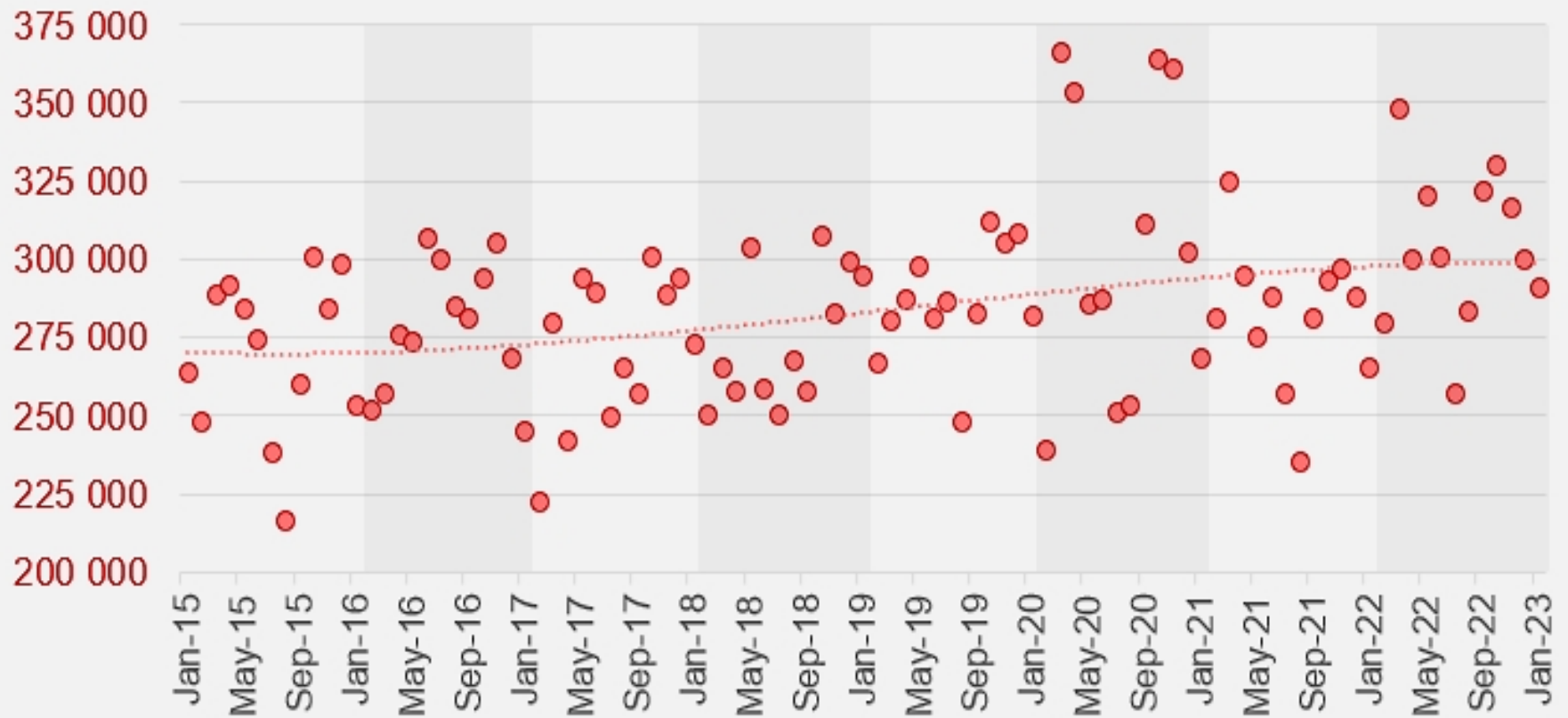
## Historical World production of processing tomatoes (x.000 ton)



# The growth of the world market



## Global Monthly Exports of Tomato Paste



Source: Tomato News

# EU Processing tomatoes

## Crop 2023 Forecast

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

	Average 2016/2022	FINAL 2020	FINAL 2021	FINAL 2022	FORECAST 2023	VARIATION 2023 vs 2022	VARIAZIONE 2023 vs average 2016/2022
Italy	5.297	5.166	6.059	5.476	5.600	2,3%	5,7%
Spain	2.966	2.650	3.185	2.125	2.600	22,4%	-12,3%
Portugal	1.470	1.262	1.596	1.414	1.500	6,1%	2,0%
Greece	404	420	420	340	440	29,4%	9,0%
France	169	136	164	142	160	12,7%	-5,5%
<b>TOMATO EUROPE</b>	<b>10.438</b>	<b>9.634</b>	<b>11.424</b>	<b>9.497</b>	<b>10.300</b>	<b>8,5%</b>	<b>-1,3%</b>
Malta	8	8	7	5	8	60,0%	0,4%
Bulgaria	44	40	40	40	40	0,0%	-9,7%
Czech Republic	25	25	25	25	25	0,0%	0,0%
Hungary	101	82	115	80	100	25,0%	-0,6%
Poland	189	175	175	175	175	0,0%	-7,4%
Slovakia	20	20	20	20	20	0,0%	0,0%
Croatia	10	10	10	10	10	0,0%	0,0%
<b>Total EU</b>	<b>10.815</b>	<b>9.994</b>	<b>11.816</b>	<b>9.852</b>	<b>10.678</b>	<b>8,4%</b>	<b>-1,3%</b>

**Consequently, in the 2023, the percentage of European production, compared to world production, should confirm the decline in 2022**

# EU vs World

## Tomatoes for processing (Final 2022 and Forecast 2023)

	Average 2016/2022	FINAL 2020	FINAL 2021	FINAL 2022	FORECAST 2023	VARIATION 2023 vs 2022	VARIAZIONE 2023 vs average 2016/2022
European Union	10.815	9.994	11.816	9.852	10.678	8,4%	-1,3%
Other Countries	27.292	28.396	27.368	28.137	31.912	13,4%	16,9%
GENERAL TOTAL	38.107	38.390	39.184	37.989	42.590	12,1%	11,8%
% UE	28,4%	26,0%	30,2%	25,9%	25,1%		

# TOP 50 Word processors

Rank by annual capacity	Company	Country	Number of factories	Location of factories	Daily processing capacity (mT)	Yearly processing capacity (mT)	2022 production (mT)	2021 production (mT)
1	MORNING STAR	USA	3	CALIFORNIA	67 000	4 900 000	3 460 000	3 660 000
2	SUGAL GROUP	PORTUGAL	5	PORTUGAL, SPAIN, CHILE	30 000	2 550 000	1 350 000	1 788 000
3	COFCO	CHINA	12	CHINA	40 000	2 080 000	1 780 000	1 550 000
4	INGOMAR PACKING COMPANY (1)	USA	2	CALIFORNIA	16 000	1 550 000	1 203 807	1 222 375
5	CONESA (2)	SPAIN	9	SPAIN, PORTUGAL CHINA, CALIFORNIA	28 900	1 500 000	910 766	1 187 630
6	JG BOSWELL (*)	USA	2	CALIFORNIA	15 000	1 200 000	1 010 000	900 000
7	CASALASCO GROUP (3)	ITALY	5	ITALY NORTH	17 400	1 044 000	820 000	570 000
8	LOS GATOS	USA	1	CALIFORNIA	9 100	1 000 000	865 000	840 000
9	CAMPBELL (*)	USA	2	CALIFORNIA	10 800	980 000	780 000	780 000
10	NEIL JONES (*)	USA	2	CALIFORNIA	10 600	950 000	580 000	560 000
11	STANISLAUS (*)	USA	1	CALIFORNIA	10 800	940 000	620 000	630 000
12	AGROFUSION (*)	UKRAINE	3	UKRAINE	13 000	780 000	60 000	710 000
13	CONSERVE ITALIA	ITALY	6	ITALY, FRANCE	12 000	700 000	416 000	485 000
14	KAGOME GROUP (1)	JAPAN	4	PORTUGAL, AUSTRALIA, JAPAN	14 000	680 000	576 000	621 000
15	MUTTI	ITALY	3	ITALY NORTH, ITALY SOUTH	9 458	660 000	603 000	680 000
16	Xinjiang GuanNong Group	CHINA	3	CHINA	15 600	660 000	386 000	380 000
17	PCP (*)	USA	1	CALIFORNIA	7 900	660 000	360 000	500 000
18	XinJiang Chalkis (4)	CHINA	7	CHINA	15 400	650 000	602 000	n/a
19	XinLiang YanYangTian (8)**	CHINA	1	CHINA	11 400	592 800	0	570 000
20	DEL MONTE (*)	USA	1	CALIFORNIA	6 200	570 000	240 000	260 000
21	TAT KONSERVE	TURKEY	3	TURKEY	11 600	550 000	542 000	503 000
22	TUKAS	TURKEY	3	TURKEY	11 000	550 000	470 000	350 000
23	CONAGRA (*)	USA	2	CALIFORNIA, CANADA	6 100	550 000	420 000	380 000
24	SICAM	TUNISIA	2	TUNISIA	9 000	500 000	289 495	350 515
25	CONSERVERIE BENAMOR (*)	ALGERIA	4	ALGERIA	7 600	500 000	n/a	n/a
26	XinJiang NongFa Group (5)	CHINA	3	CHINA	9 500	494 000	479 000	434 000
27	STERILTOM (6)	ITALY	2	ITALY NORTH	6 500	430 000	390 000	410 000
28	ROJINTAAK	IRAN	1	IRAN	4 300	430 000	141 142	102 334
29	TRANSA	SPAIN	2	SPAIN, PORTUGAL	10 500	420 000	300 000	320 000
30	PREDILECTA	BRAZIL	5	BRAZIL	5 300	400 000	355 000	320 000
31	TOMATES DEL GUADIANA	SPAIN	1	SPAIN	8 000	400 000	218 490	347 007
32	AGROZZI	CHILE	1	CHILE	6 000	380 000	357 000	380 000
33	SULTAN (*)	TURKEY	4	TURKEY	8 200	370 000	350 000	n/a
34	LA DORIA	ITALY	4	ITALY NORTH, ITALY SOUTH	7 700	370 000	239 000	291 000
35	TaCheng HongXiang	CHINA	2	CHINA	7 000	364 000	161 000	154 000
36	Inner Mongolian FuYong	CHINA	2	CHINA	7 200	360 000	187 000	196 000
37	ESCALON (*)	USA	1	CALIFORNIA	3 600	348 000	250 000	210 000
38	PRONAT	SPAIN	1	SPAIN	5 800	348 000	203 123	271 632
39	P&J FOR JUICE AND PASTE	EGYPT	2	EGYPT	1 000	330 000	280 000	246 000
40	RODOLFI MANSUETO	ITALY	3	ITALY	6 300	300 000	270 000	285 000
41	PRINCES	ITALY	1	ITALY SOUTH	5 000	300 000	230 000	220 000
42	NOMIKOS	GREECE	3	GREECE	6 100	300 000	130 000	190 000
43	GIAGUARO (*)	ITALY	2	ITALY NORTH, ITALY SOUTH	7 000	300 000	n/a	n/a
44	EMPRESAS IANSA (7)	CHILE	2	CHILE, PERU	3 600	295 000	220 000	191 000
45	ZER (*)	TURKEY	3	TURKEY	6 000	270 000	200 000	n/a
46	COMOCAP	TUNISIA	1	TUNISIA	4 800	264 000	42 842	107 052
47	HIGHBURY CANCO	CANADA	1	ONTARIO	4 800	240 000	200 000	144 000
48	LAS MARISMAS	SPAIN	1	SPAIN	4 500	230 000	0	150 000
49	ALSAT	SPAIN	1	SPAIN	4 700	220 000	122 000	200 000
50	KRAFT HEINZ (9)	TURKEY	1	TURKEY	4 500	210 000	180 000	160 000
51	SOLANA	ITALY	1	ITALY NORTH	3 700	200 000	160 000	195 000
52	TOMALIA	SPAIN	1	SPAIN	4 500	200 000	106 000	174 000

Source: Tomato News

The constant growth of the price of fresh tomatoes

**The 2022 tomato campaign had already been characterized by a significant increase in fresh tomato prices in the main production areas**

## Price evolution of processing tomatoes in the main producing countries up to 2022

updated: 21/04/2022

Field-Gate Indicative Price (for Tomato Paste Production, USD/metric T)										
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
California	\$77,7	\$91,5	\$88,2	\$79,9	\$77,7	\$81,0	\$83,2	\$88,2	\$93,2	\$115,8
China	\$78,5	\$81,6	\$66,8	\$59,5	\$66,1	\$59,0	\$59,2	\$63,2	\$71,5	\$78,0
France	\$107,7	\$109,8	\$90,5	\$88,8	\$93,3	\$91,9	\$83,8	\$91,3	\$100,3	\$109,3
Greece	\$113,0	\$113,7	\$98,3	\$91,0	\$99,2	\$95,9	\$94,9	\$103,0	\$103,2	\$119,6
Italy North	\$113,0	\$107,7	\$89,3	\$85,5	\$93,9	\$92,7	\$96,0	\$103,0	\$108,6	\$121,8
Portugal	\$103,7	\$104,6	\$89,3	\$84,4	\$85,0	\$81,4	\$83,8	\$89,0	\$92,0	\$105,1
Spain	\$99,7	\$100,7	\$86,0	\$81,0	\$84,3	\$80,2	\$78,2	\$81,9	\$92,0	\$113,5
Tunisia	\$76,5	\$75,0	\$74,8	\$67,7	\$70,9	\$66,3	\$55,8	\$0,0	\$0,0	\$68,0
Turkey	\$111,7	\$121,6	\$102,7	\$84,9	\$78,5	\$116,3	\$96,0	\$86,6	\$79,1	\$95,7
Global Average	\$93	\$98	\$87	\$80	\$82	\$82	\$83	\$87	\$93	\$107

delivered

2022: 31.3 million mT valued (79% of quantities expected worldwide)

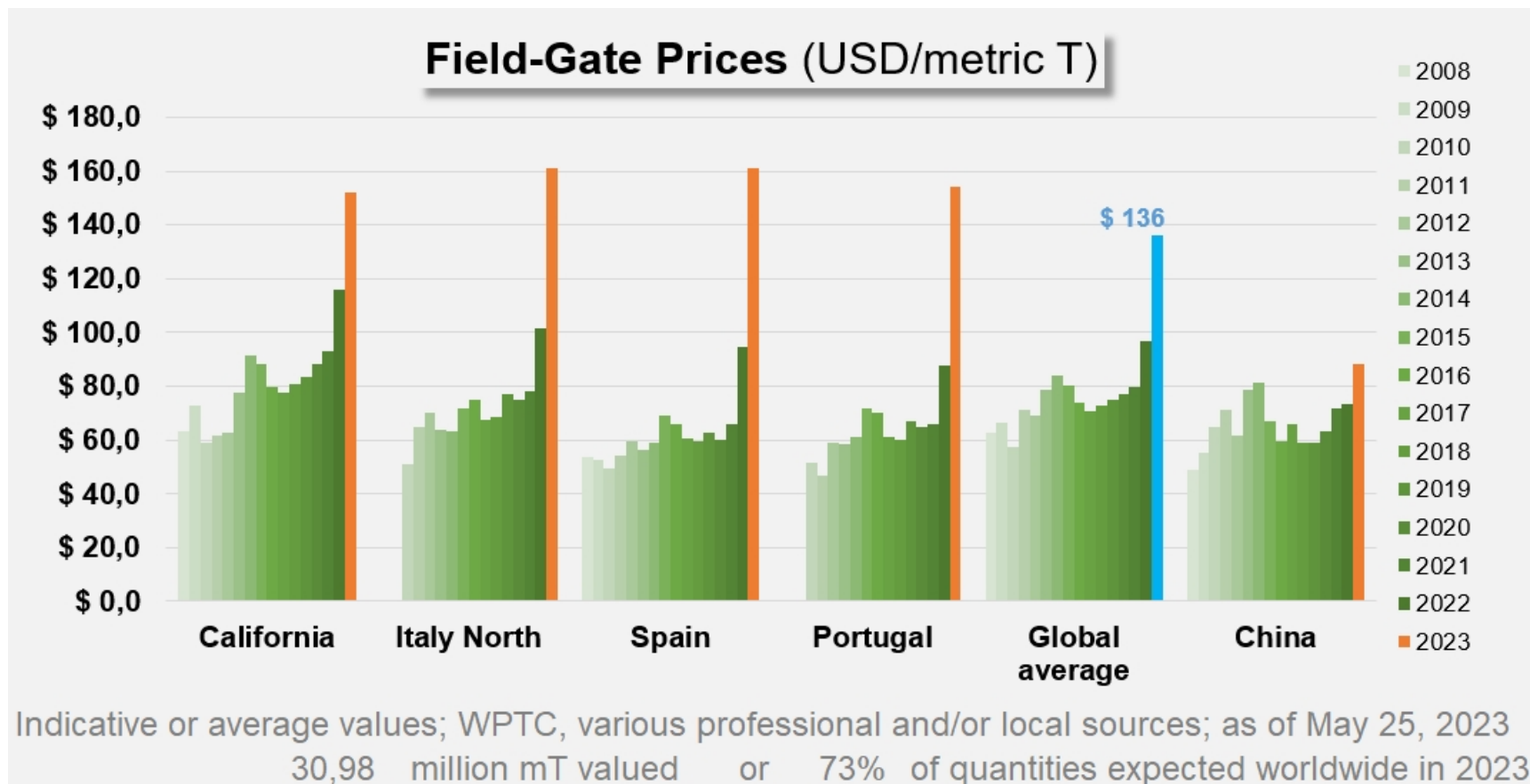
Indicative or average values, WPTC, various professional and/or local sources

Based on USD/Euro average exchange rate April 2022 (0,8988)

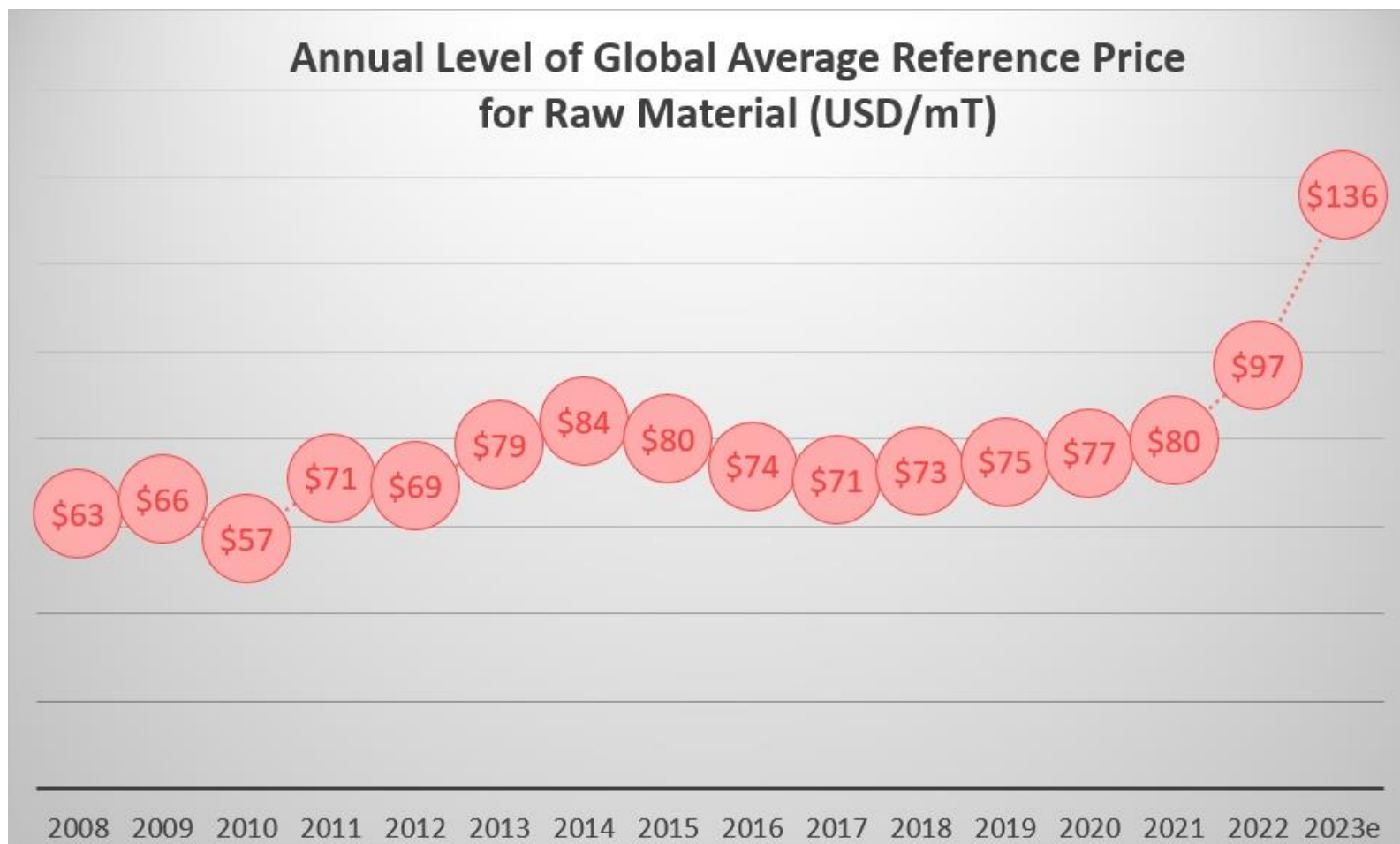
**The 2023 tomato campaign is characterized by an even greater increase in tomato prices in the main production areas:**

- + 45% in the Iberian area**
- + 38% in Northern Italy**
- + 25% in Southern Italy**
- + 31% in California**
- + 25 % in China (?)**

# Fresh tomato for processing price trend in the main producing countries



# World trend price fresh processing tomatoes

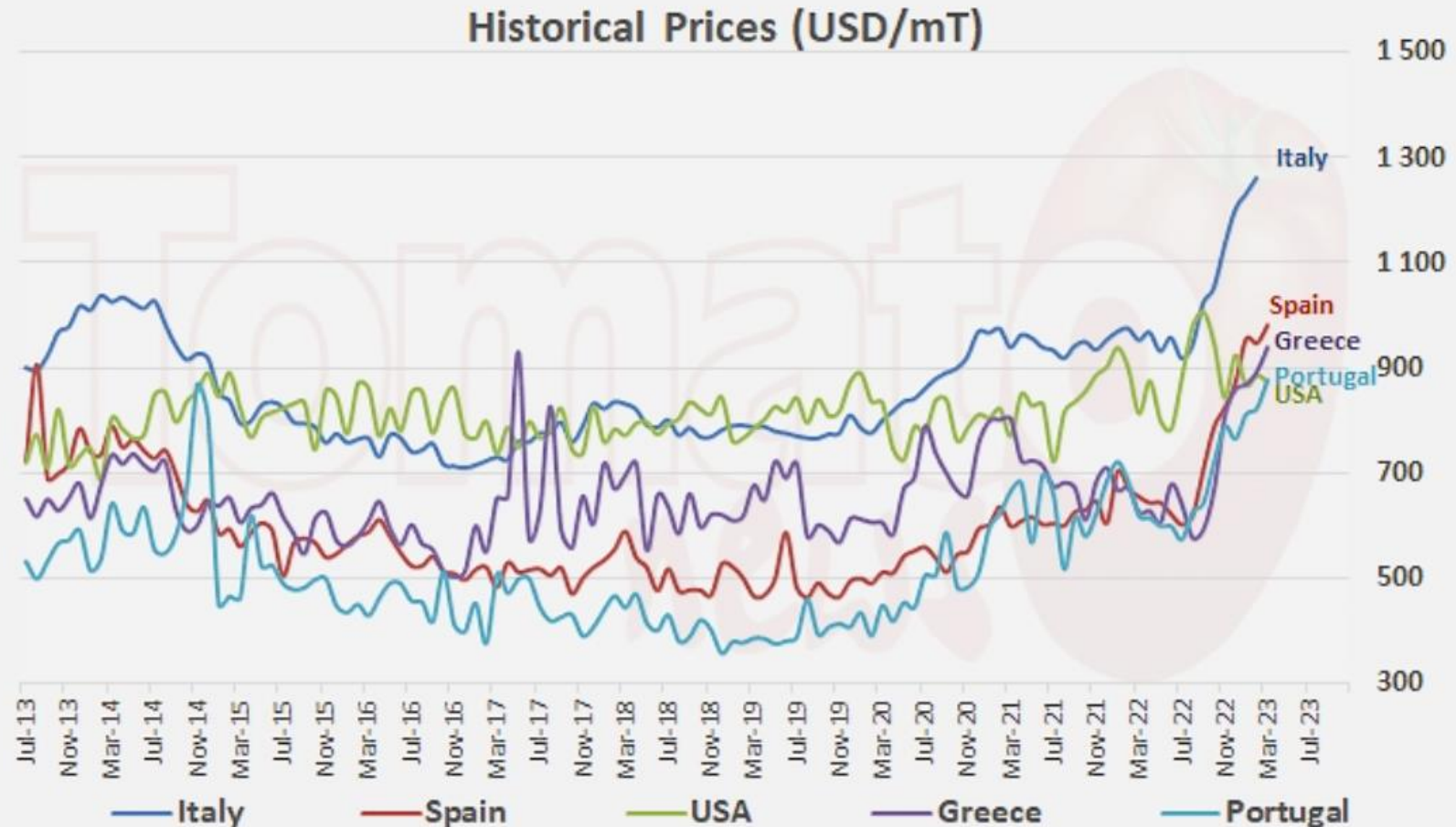


**The question now is the same as  
always:**

*Will the market be able to absorb  
this dramatic increase in the prices  
of fresh tomatoes for processing,  
especially in products with lower  
added value?*

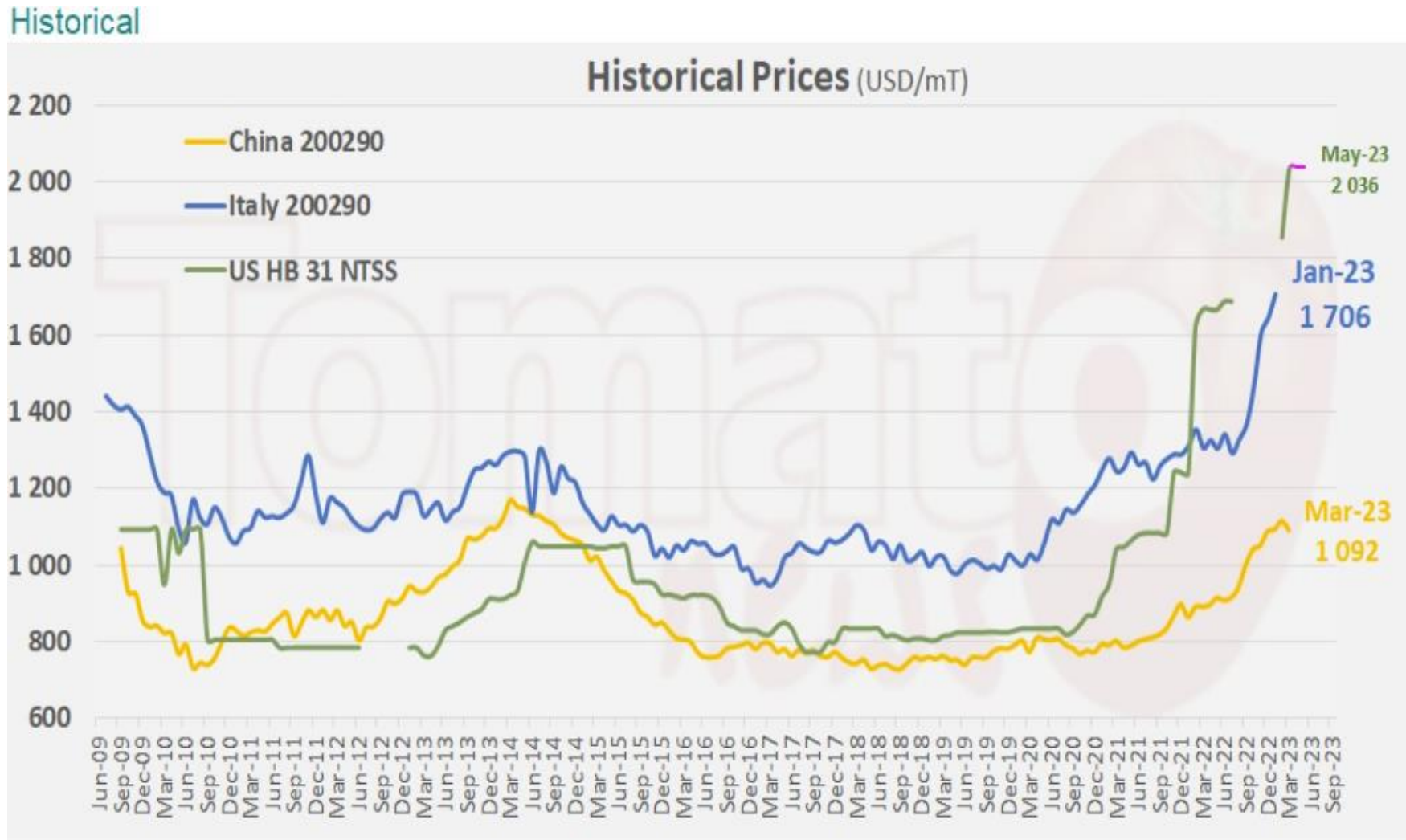
# Canned tomatoes price trend (at iune 23)

Historical



*Over the last five marketing years, these five countries have accounted for nearly 93% of the global trade of canned tomatoes.*

# Tomato Paste trend prince



Source: Tomato News

## **Does the Chinese threat return?**

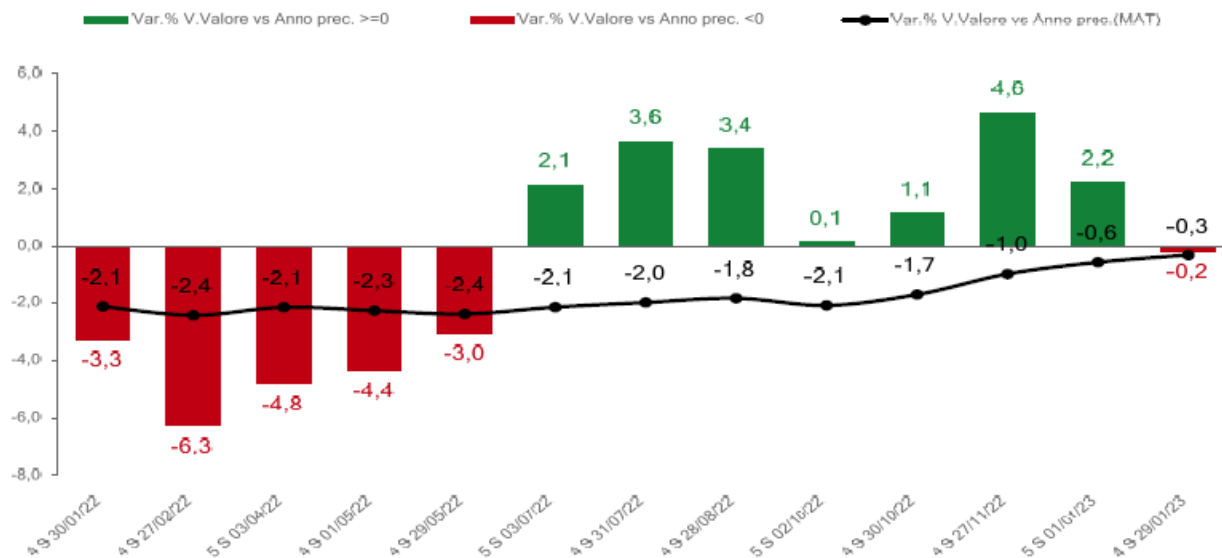
**The temptation for re-processing industries, particularly multinational ones, could be very strong...**

# The Organic Tomato in Trouble

# Value sales trend of the main Italian brand of organic tomato products



## Andamento Mercato Bio a Valore – Trend



Contribution (in %)

-14,1	-27,0	-26,9	-18,5	-12,8	14,6	18,8	17,2	1,0	6,7	26,4	15,3	-0,8
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Period % Weight

7,4	7,2	9,4	7,2	7,3	8,7	6,6	6,5	9,1	7,3	7,3	8,6	7,4
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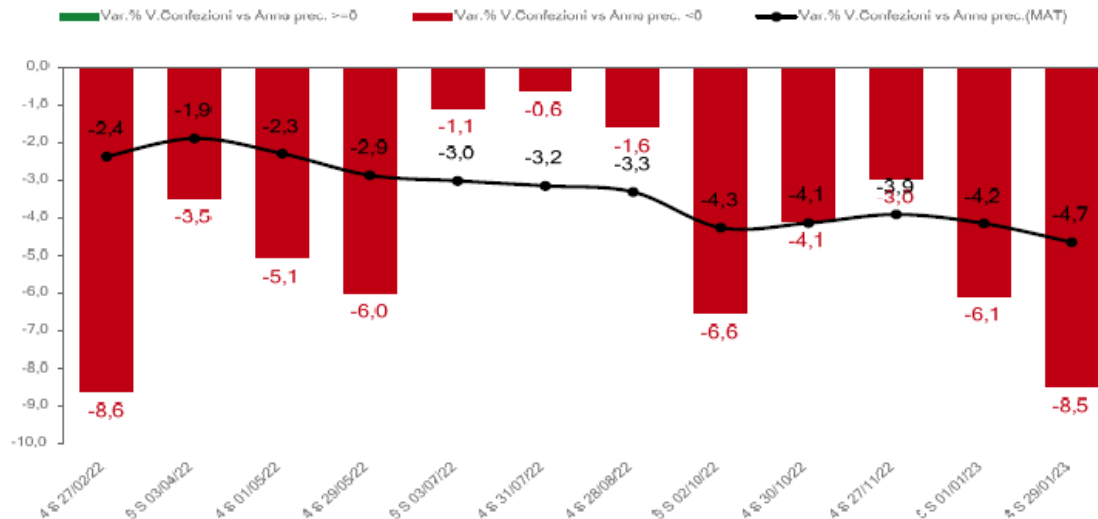
# Volume sales trend of the main Italian brand of organic tomato products



## Andamento Mercato Bio a Volume – Trend %

Nel corso del tempo si è registrata un' accelerazione delle vendite di un prodotto?

TOTALE ALIMENTARE BIO – IT Distr. Modema – 12 ultime 4 settimane (52 settimane rolling) – Settimana terminante il 29/01/23



Contribution (in %)

-15,6	-8,0	-8,9	-10,5	-2,1	-0,9	-2,3	-14,0	-6,8	-4,8	-11,5	-14,6
Period % Weight											
8,1	10,8	8,1	8,0	9,5	7,2	6,8	9,7	7,8	7,6	8,7	7,7

Paese: Italy Categoria: X1000BIO – BIOLOGICO(MT)  
Confrontato con Anno precedente Settimana terminante il 29/01/23

## **2022/2023 Update**

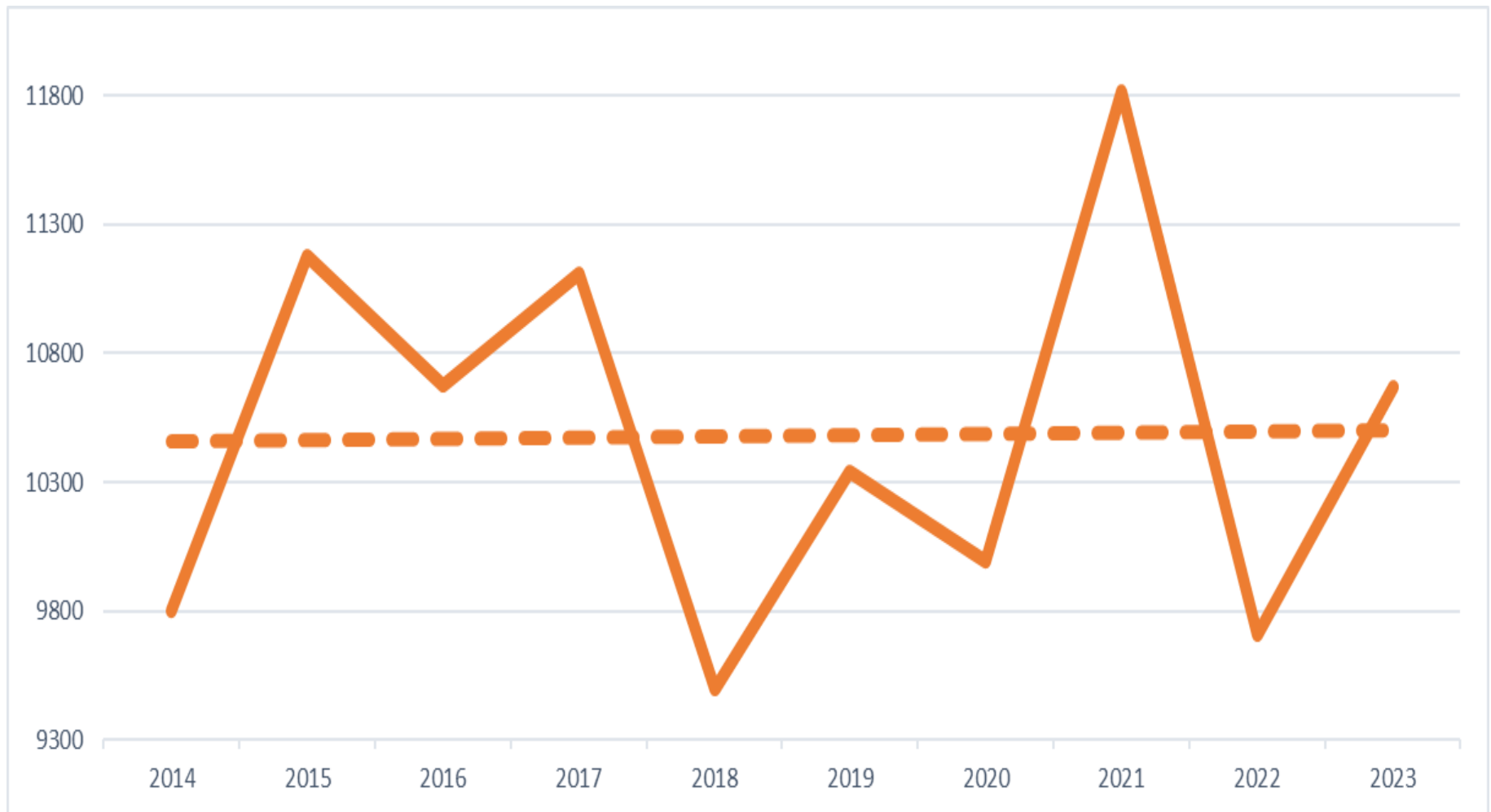
**TOMATO EUROPE has conducted a survey on the production of tomato products in Europe in order to determine the most correct customs codes and relative conversion factors**

## Type of tomato products manufactured annually in Europe, divided by volume (t) and fresh tomato equivalent (t)

Short Description	2022 (t)	Conversion Coefficient revised	fresh tomato equivalent	fresh tomato equivalent	
Peeled tomatoes < =1 kg	1.236.477	1,35	1.669.243		
Peeled tomatoes >1 kg	1.226.493	1,50	1.839.740	3.508.983	36%
Tomatoes with dry matters < 12% and packaging >1 kg	363.465	2,15	781.450		
Tomatoes with dry matters < 12% and packaging < =1 kg	339.952	1,65	560.921	1.342.371	14%
Tomatoes with dry matters ≥ 12% and <20% and packaging >1 kg	198.782	2,70	536.711		
Tomatoes with dry matters ≥ 12% and <20% and packaging < =1 kg	3.089	2,70	8.341	545.052	6%
Tomatoes with dry matters ≥ 20% and ≤ 34% and packaging >1 kg	546.769	5,40	2.952.555		
Tomatoes with dry matters ≥ 20% and ≤ 34% and packaging < =1 kg	13.342	4,30	57.372	3.009.927	31%
Tomatoes with dry matters > 34% and packaging >1 kg	166.205	7,40	1.229.916		
Tomatoes with dry matters > 34% and packaging < =1 kg	3.306	7,15	23.638	1.253.553	13%
	<b>4.097.881</b>		<b>9.659.887</b>		

In reality there is a strong differentiation of production specialization in the main European production areas of processing tomatoes and this fact has favored the stability of European production

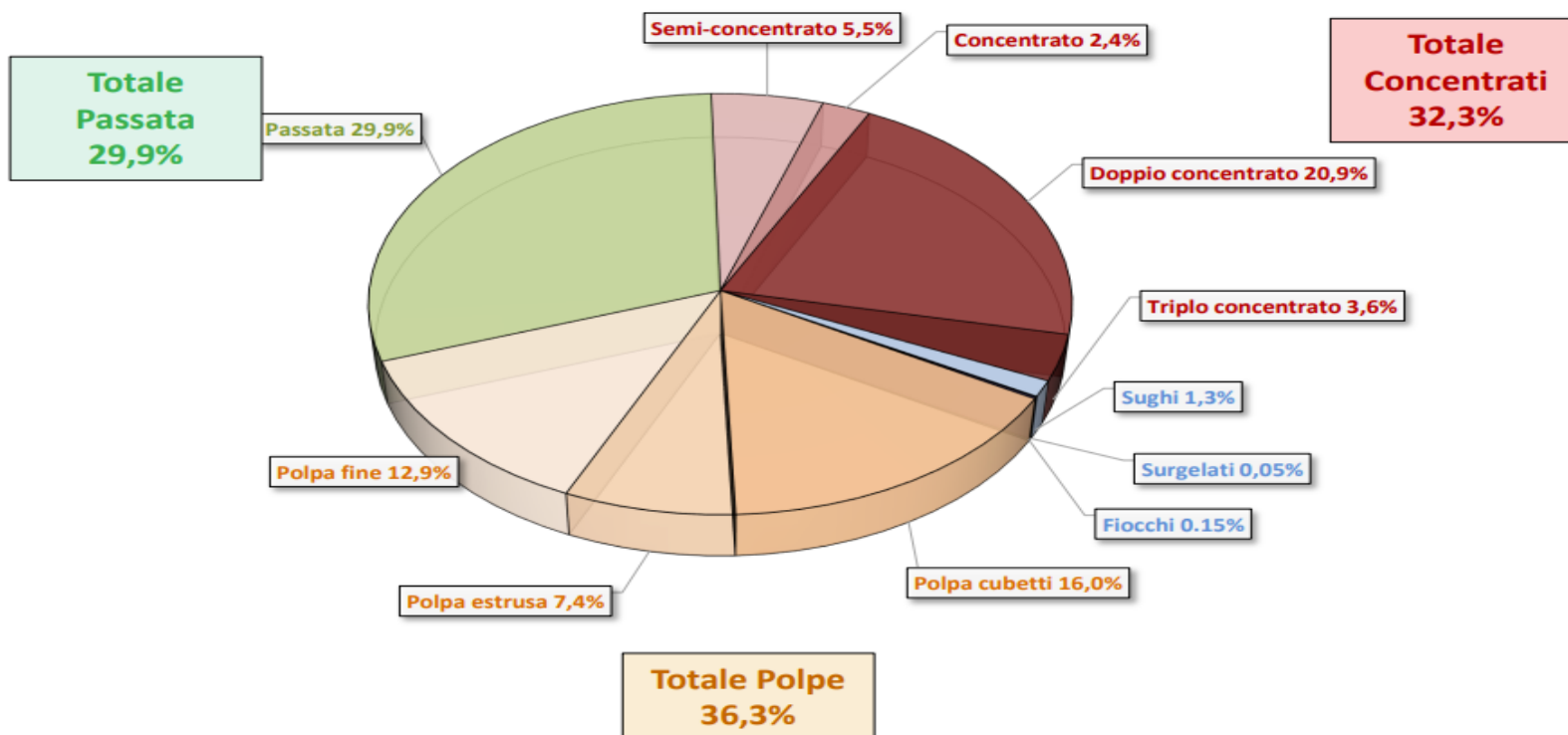
## Evolution of Historical European production of processing tomatoes (x.000 ton)



# Production of first processing tomatoes in Northern 2022

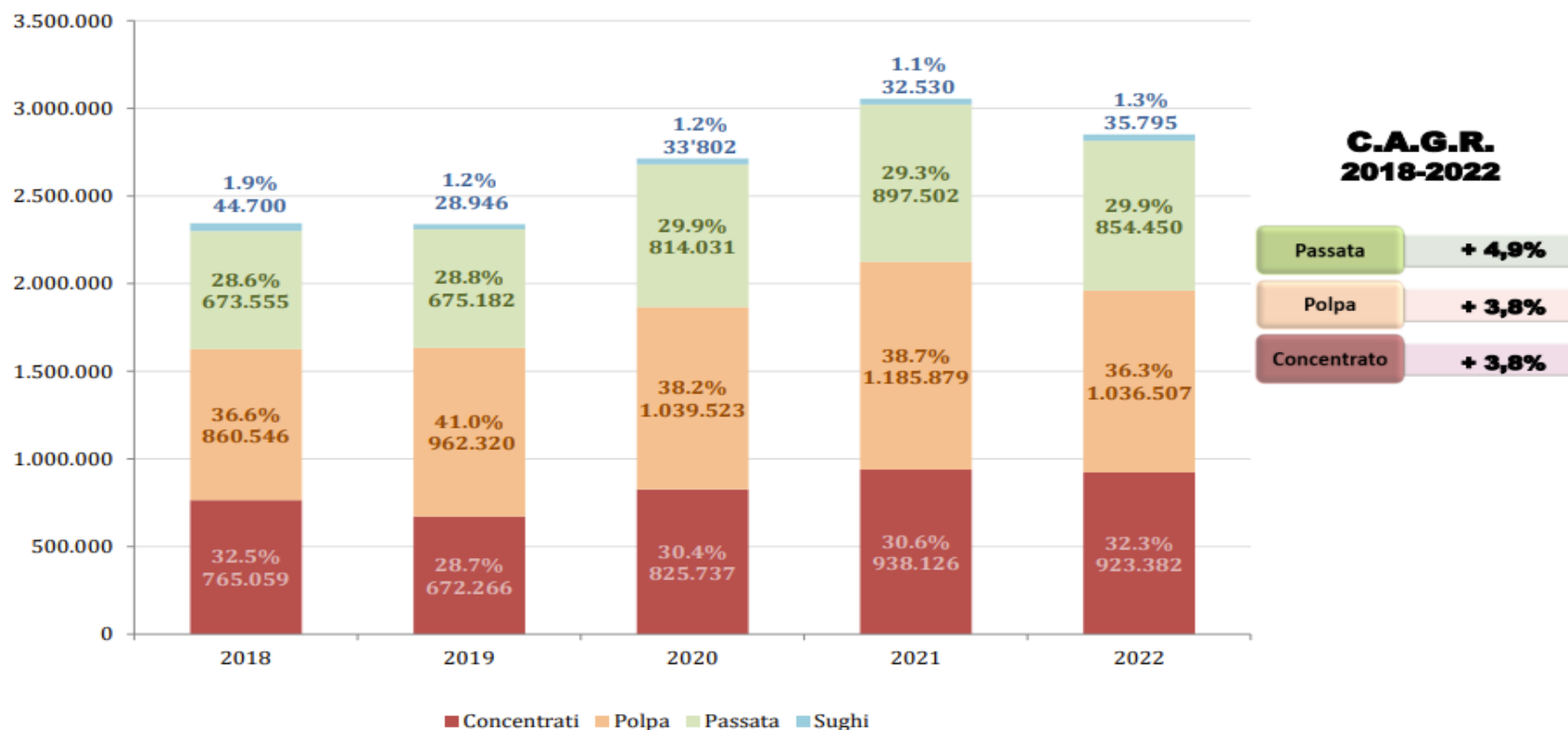
## - Data from the Interprofessional Association

**Materia prima** distinta per categoria merceologica.  
Percentuale sul quantitativo 2022



# Historical balance in Northern Italy productions

## Materia prima per categoria merceologica di destinazione Confronto storico 2018 - 2022



## Southern Italy Productions – Whole and diced peeled tomatoes represent 75% of tomatoes processed in this area

<b>Sud Italia</b>	<b>2021 (t)</b>		<b>fresh tomato equivalent</b>
PEELED TOMATOES < = 1KG	730.508	1,35	986.186
PEELED TOMATOES < = 1KG	266.046	1,50	399.069
PEELED TOMATOES > 1KG	151.961	1,35	205.147
PEELED TOMATOES < = 1KG	397.741	1,50	596.612
TOMATOES DRY MATTERS <12% AND PACKAGING >1 KG	152.790	2,15	328.499
TOMATOES DRY MATTERS < 12% AND PACKAGING <= 1 KG	82.271	1,65	135.747
TOMATOES DRY MATTERS >= 12% <20% AND PACKAGING >1 KG	356,00	2,70	961,20
TOMATOES DRY MATTERS >= 12% <20% AND PACKAGING <= 1 KG	0	2,70	0
TOMATOES DRY MATTERS >= 20% <= 34% AND PACKAGING > 1 KG	50.273	5,40	271.474
TOMATOES DRY MATTERS >= 20% <= 34% AND PACKAGING <= 1 KG	-	4,30	-
TOMATOES DRY MATTERS > 34% AND PACKAGING > 1 KG	255	7,40	1.887
TOMATOES DRY MATTERS > 34% AND PACKAGING <= 1 KG	-	7,15	-
	<b>1.832.201</b>		<b>2.925.582</b>

## Clear prevalence of the first processing of the tomato in the Spanish industry

Spagna	2022 (t)		<i>fresh tomato equivalent</i>
PEELED TOMATOES <= 1KG	13.075	1,35	17.651
PEELED TOMATOES > 1KG	94.488	1,50	141.732
TOMATOES DRY MATTERS <12% AND PACKAGING >1 KG			-
TOMATOES DRY MATTERS < 12% AND PACKAGING <= 1 KG			-
TOMATOES DRY MATTERS >= 12% <20% AND PACKAGING >1 KG	44.413	2,70	119.915
TOMATOES DRY MATTERS >= 12% <20% AND PACKAGING <= 1 KG	330	2,70	891
TOMATOES DRY MATTERS >= 20% <= 34% AND PACKAGING > 1 KG	202.326	5,40	1.092.560
TOMATOES DRY MATTERS >= 20% <= 34% AND PACKAGING <= 1 KG			-
TOMATOES DRY MATTERS > 34% AND PACKAGING > 1 KG	111.977	7,40	828.630
TOMATOES DRY MATTERS > 34% AND PACKAGING <= 1 KG			-
	<b>466.609</b>		<b>2.201.380</b>



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**Thanks for your attention**