



Campaign 2023/24 considerations and Summer 2024 campaign previsions



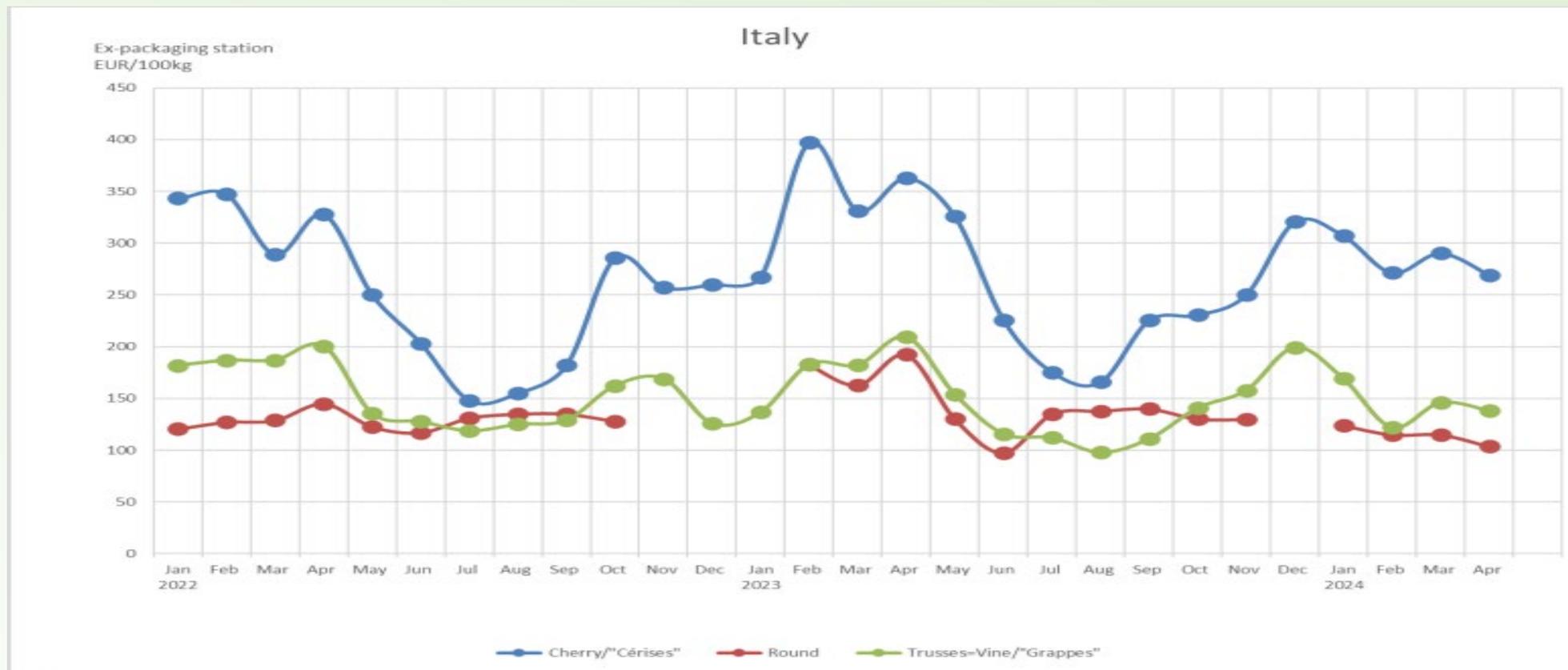
Topics:

1. Winter campaign report (production).
2. Analysis on the prices of round tomatoes, bunch tomatoes and cherry
3. Summer campaign expectation
4. Evolution of the consumption of fresh tomatoes
5. Considerations about some news given from specialized journals
6. Overview on the extra-UE suppliers
7. Final considerations

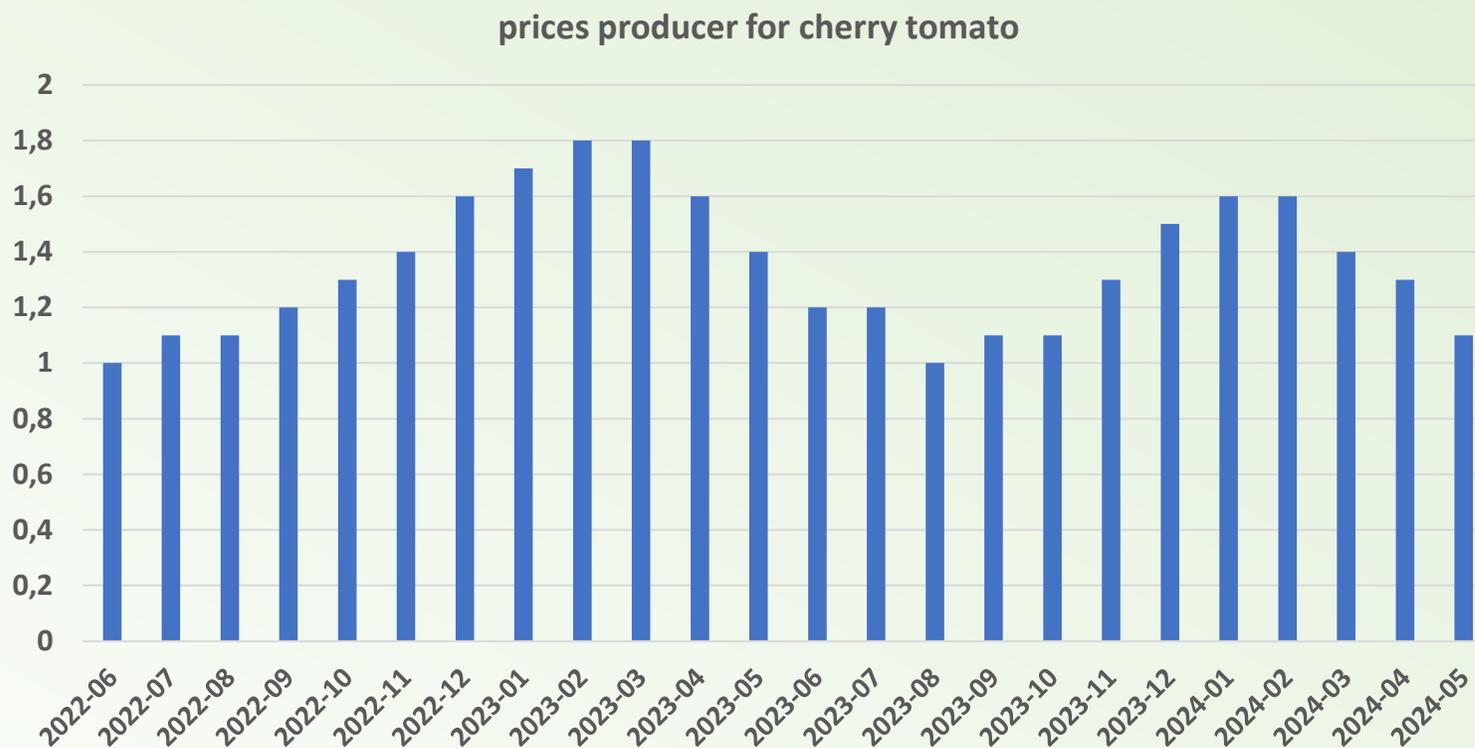


2023/24 SEASON: < PRODUCTION

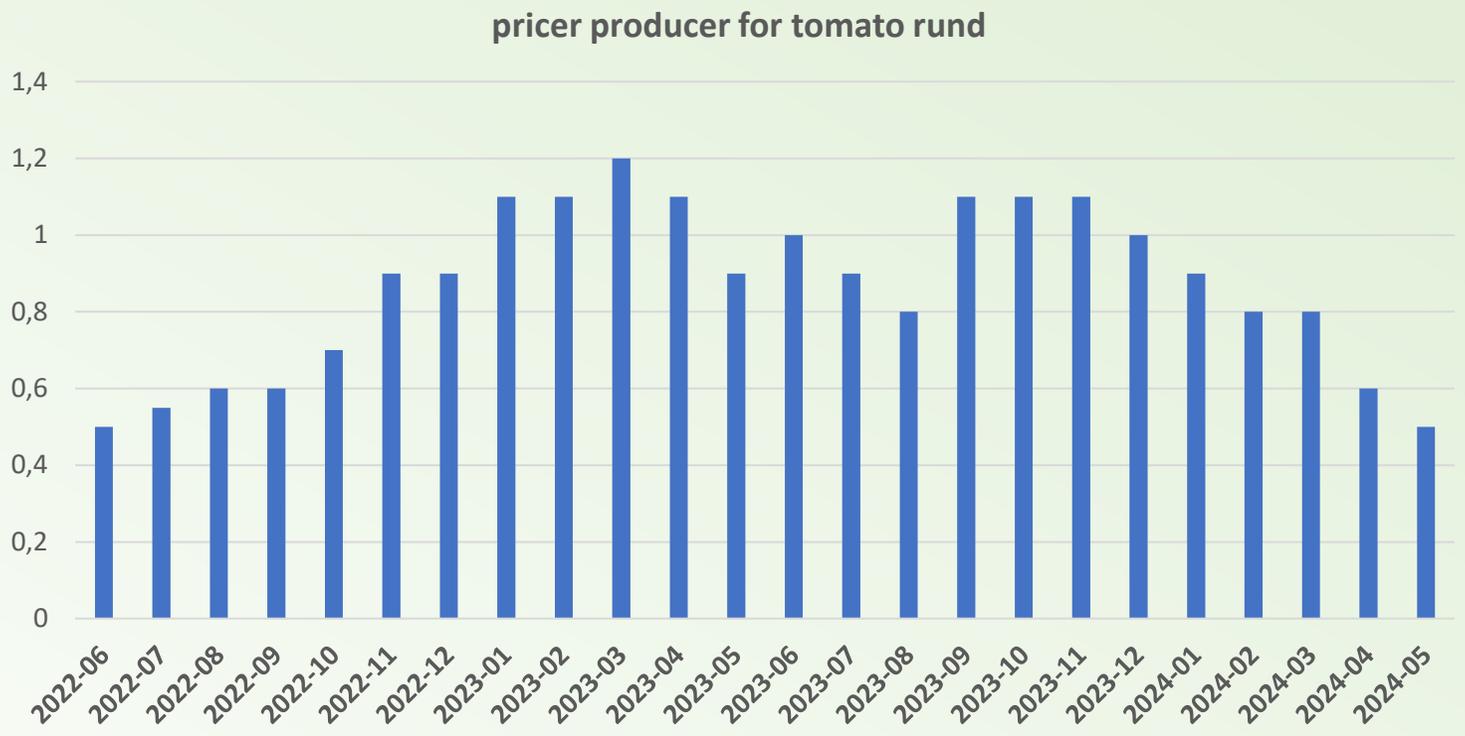
1. Analysis on the last 6 months
2. Causes of the decrease in production (tv 4
3. Analysis on the current production



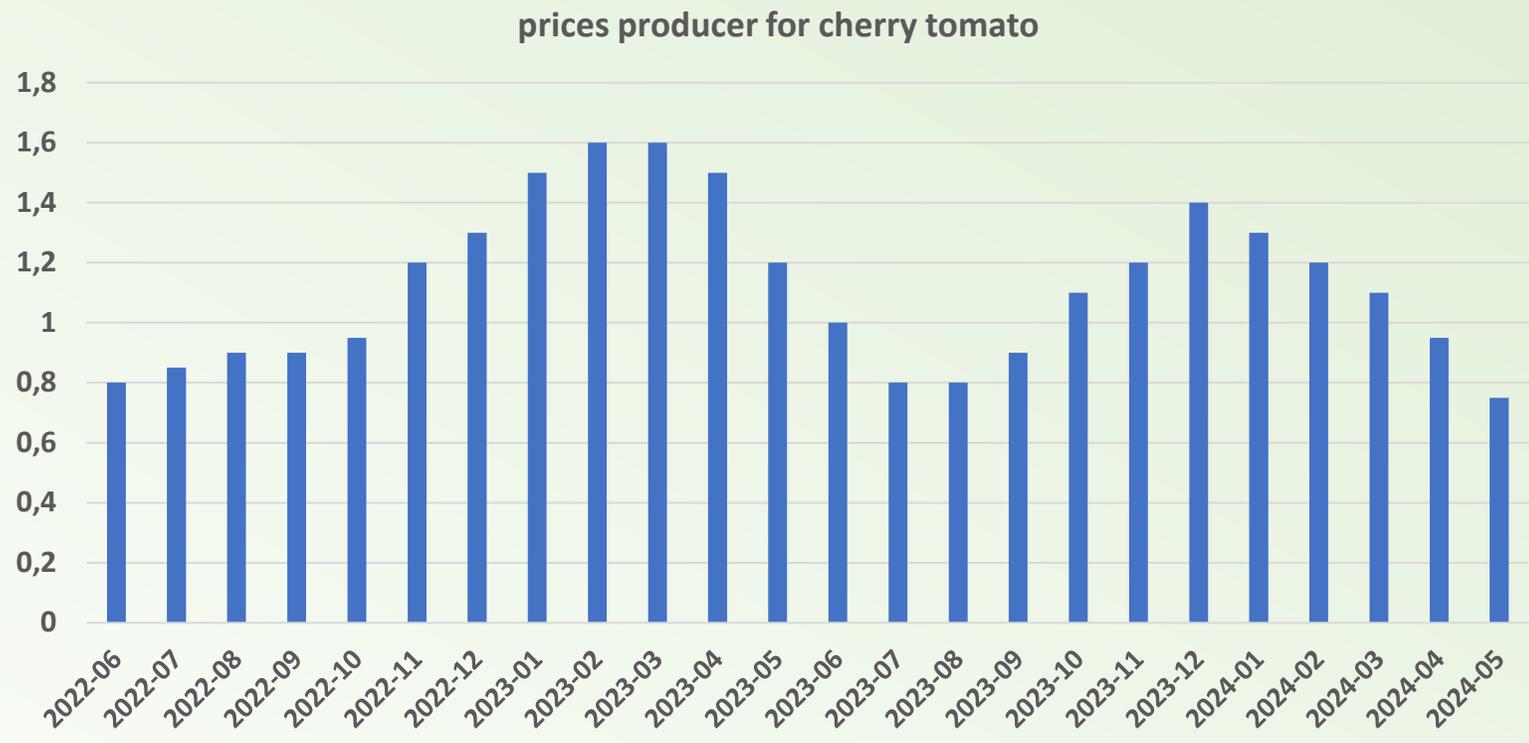
1. Analysis of the market price season 2023/24
2. Analysis of the price of the current market
3. Future predictions



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Summer campaign predictions

The climate change make the cultivation increasingly problematic

Thanks to this net that is able to regulate the internal temperature of the greenhouse, there are many advantages, starting with a lower need during the fertigation phase of the plant. In addition, there is also an increase in the humidity level inside the greenhouse, which naturally turns to greater dryness in summer.



Decline in consumption in Italy



Andando per ordine: la frequenza di acquisto sale negli ultimi 12 mesi portandosi a 18 volte in un anno, questo è dovuto in parte al ritorno ad uno shopping a ritmi pre-Covid e alla ricerca di offerte anche diluendo gli acquisti in più occasioni e più insegne. La spesa media per atto aumenta notevolmente portandosi a circa 2,4 euro, quando solo due anni fa era di circa 2,1 euro, questo è tendenzialmente da ricercarsi in aumento generico dei prezzi che interessa i mercati alimentari. La quantità acquistata ogni volta è diminuita negli ultimi dodici mesi confronto i due anni precedenti quando era intorno ai 0,9 kg, portandosi ora a circa 0,8 kg.

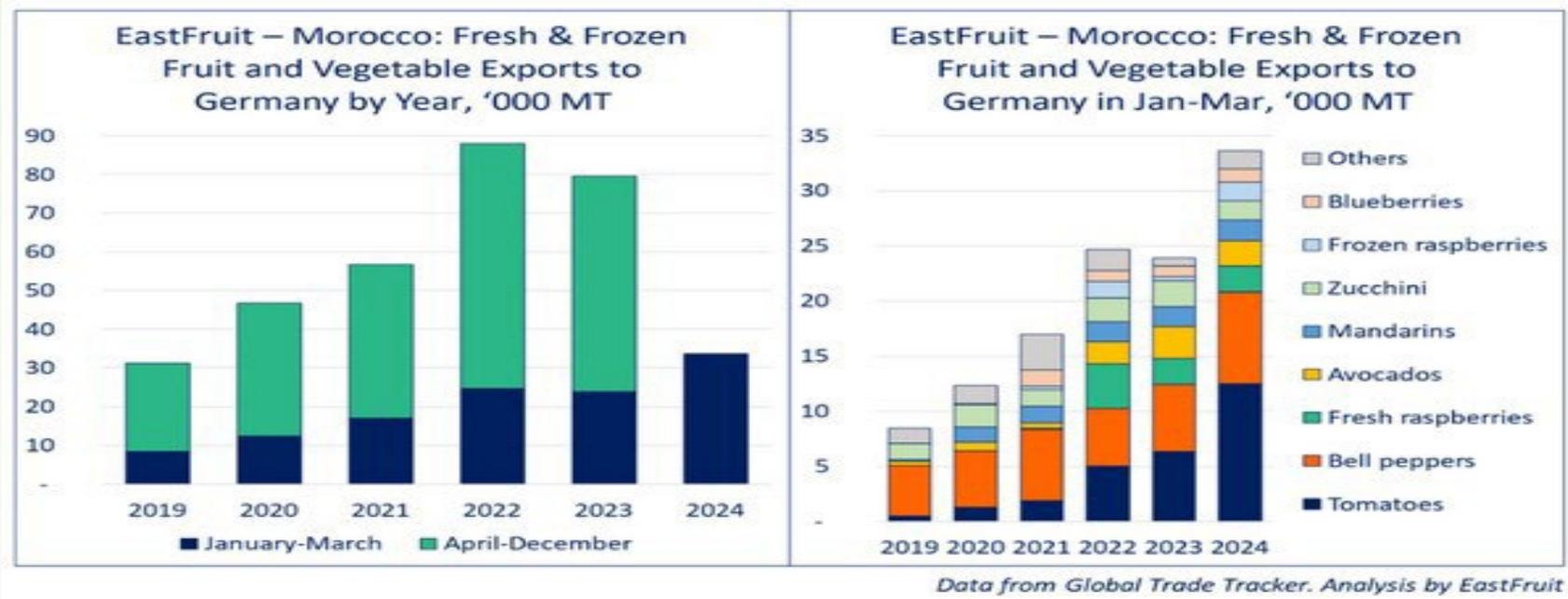


Some news in specialized newspapers on imports in Europe

- **Rivers of Moroccan tomatoes in Europe: +42% in the last decade *In Spain, imports have had a dizzying increase: +221%***
07/05/2024
- **Tomatoes, the prices hit the bottom: cherry drops even to 20 cents**
14/05/2024
- **Albanian tomatoes: a tough competitor thanks to the italian know-how**
17/05/2024



Morocco rules the first months of 2024 with historical exports of fruits and vegetables to Germany 100%



lun 10 giu 2024

Europe represents the 94% of the moroccan exports, Sub-saharan Africa the 4% and Gulf countries the 0,4%. Germany is the only nation towards which the moroccan exports are growing; 23.000 tons of tomatoes were directly imported, an increase of +414% compared to the 2022/2023 season



«The decline in tomato production in Europe has benefited the Turkish product»



This downturn has intensified Turkey's efforts in tomato exports to European countries in 2024. As a result, it was a very beneficial campaign for our producers.

Nell'ultima stagione, abbiamo consegnato 588.418 tonnellate di pomodori in 52 Paesi, tra cui Romania, Ucraina, Polonia, Germania, Bulgaria, Paesi Bassi, Regno Unito, Russia, Danimarca, Spagna, Italia, Estonia e Francia".

Last season, we delivered 588.418 tons of tomatoes to 52 countries, including Romania, Ukraine, Poland, Germany, Bulgaria, the Netherlands, the United Kingdom, Russia, Denmark, Spain, Italy, Estonia and France." **Romania was among the countries to which Turkey exported the most tomatoes. Last year, the country sold nearly \$92 million worth of tomatoes to Romania, followed by Ukraine with \$64.6 million, Poland with \$56.6 million, Germany with nearly \$54 million, and Russia with \$40.6 million.**

17 apr 2024



Discussion points on the import :

1. Lower cost of agricultural labour and exploitation
2. Lack of controls on the ethical management of workers' working conditions
3. Lower cost for workplace safety and social security
4. Phytosanitary controls at borders

Ethical Management



Exploitation of labour



Lack of safety in the workplace



Phytosanitary controls





THANK YOU!

