



#GrowingTheFuture

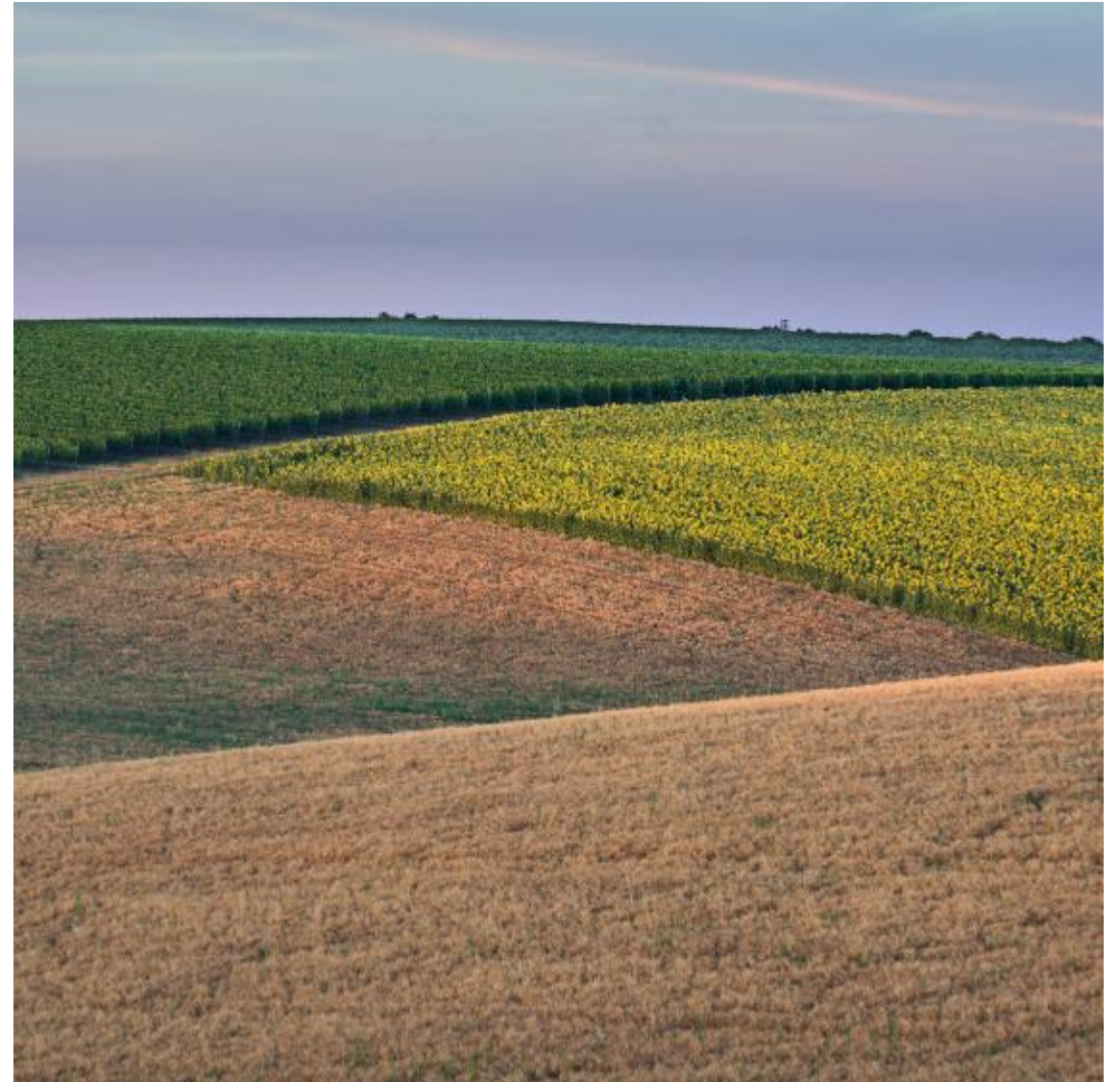
Market Observatory on Tomatoes

Euroseeds

21.06.2024

Content

- Introduction to data to be presented
- Quantity of tomato seeds produced in EU
vs third countries
- Quantity of tomato seeds marketed in EU
- ToBRFV resistant tomato varieties

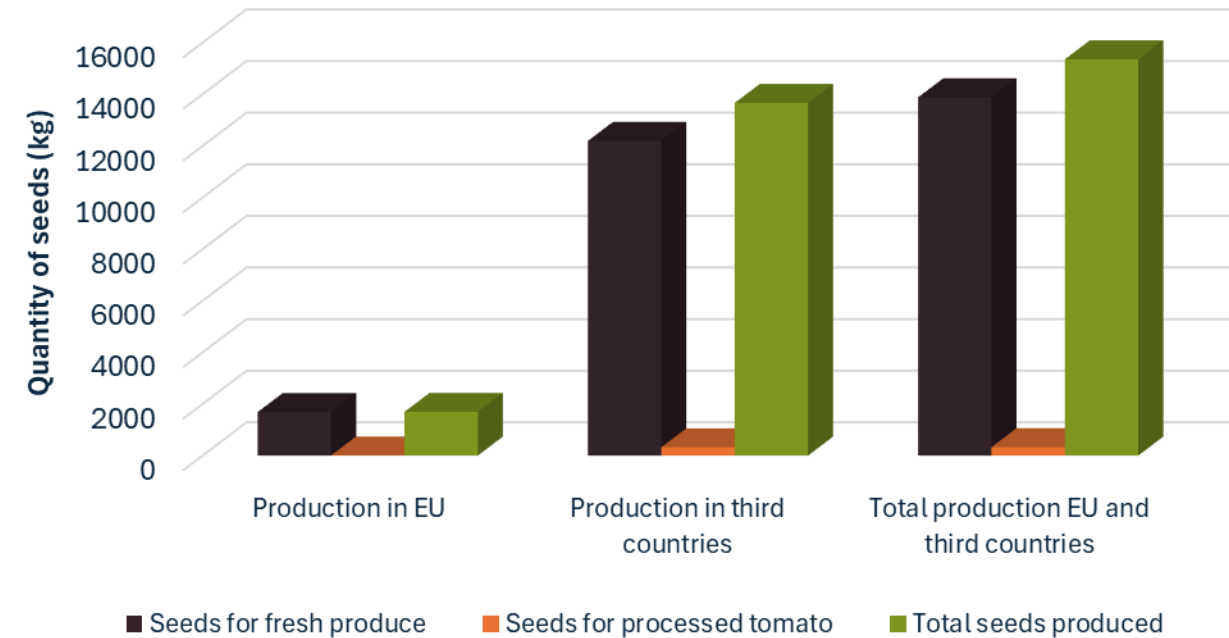


Production and Marketing of Tomato Seeds

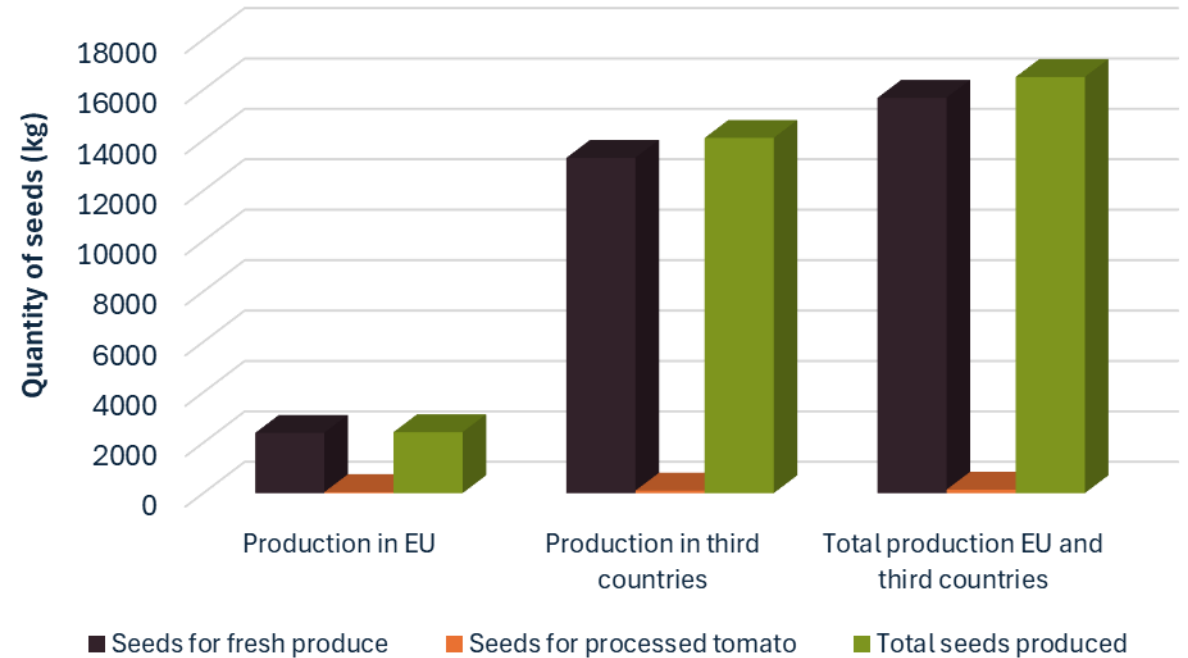
- Euroseeds conducted a survey among its members focusing on years 2020 and 2021:
 - Quantity of fresh and processed tomato seeds produced in the EU
 - Quantity of fresh and processed tomato seeds produced in third countries
 - Quantity of seeds marketed in the EU (produced in EU)
 - Quantity of seeds marketed in EU (produced in third countries)
- **The data presented represents 50% of the Euroseeds membership active in the production and marketing of tomato seeds**

Quantity of tomato seeds produced in EU and third countries

Tomato seeds production in 2020



Tomato seeds production in 2021

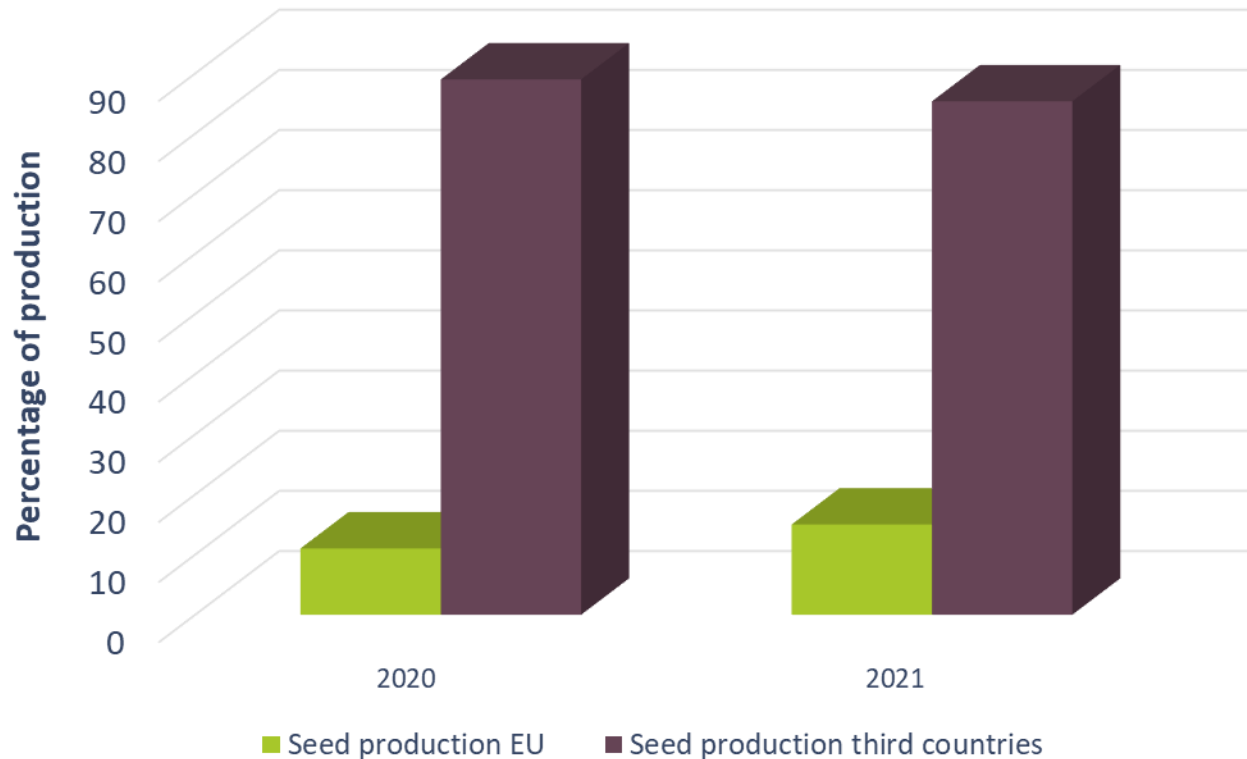


Production	EU	Third countries	Total EU and third countries
Seeds for fresh produce	1690	12200	13880
Seeds for processed tomato	10	320	330
Total of processed and fresh produce seeds	1700	13670	15360

Production	EU	third countries	Total EU and third countries
Seeds for fresh produce	2390	13300	15680
Seeds for processed tomato	40	100	140
Total of processed and fresh produce seeds	2420	11090	16510

Comparison of tomato seeds production between 2020 and 2021

Percentage of tomato production in 2020 vs 2021



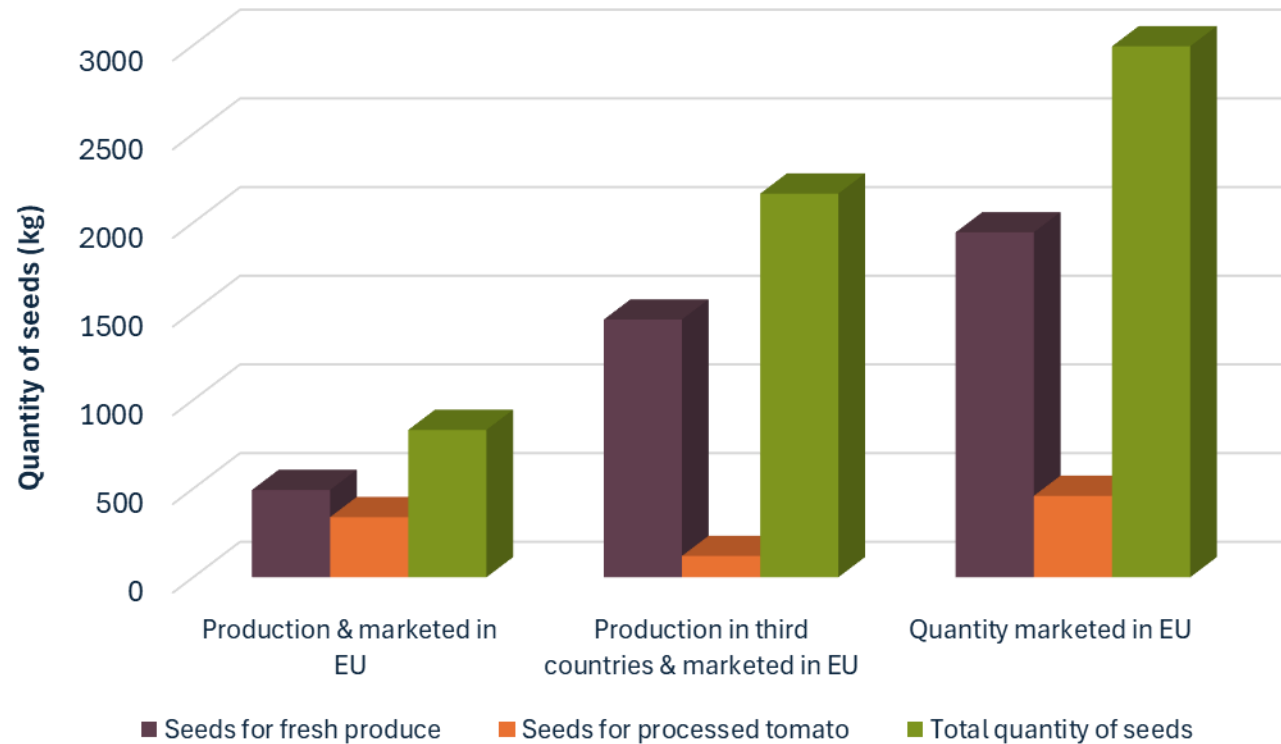
	2020	2021
% Seed production EU	11	15
% Seed production third countries	89	85

Summary: Tomato Seed Production 2020 and 2021

- At least 85% of the tomato seeds are produced in third countries
- About 5% increase in EU productions for 2021 compared to 2020
 - Induced by planning and spreading the risk during covid period
- A notable 4% increase in tomato production in 2021 compared to 2020

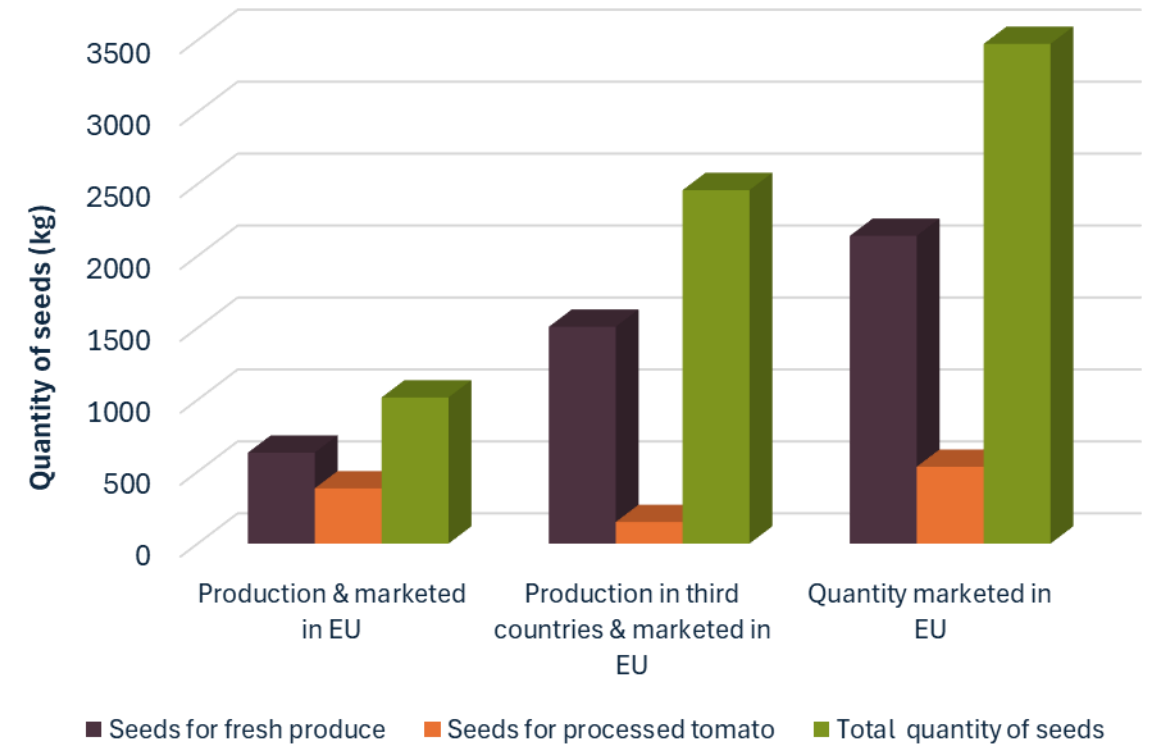
Quantity of tomato seeds marketed in EU

Tomato seeds marketed in 2020



Marketed seeds produced from	EU	third countries	Total Quantity marketed in EU
Seeds for fresh produce	490	1460	1950
Seeds for processed tomato	340	120	460
Total quantity of seeds	830	2170	3000

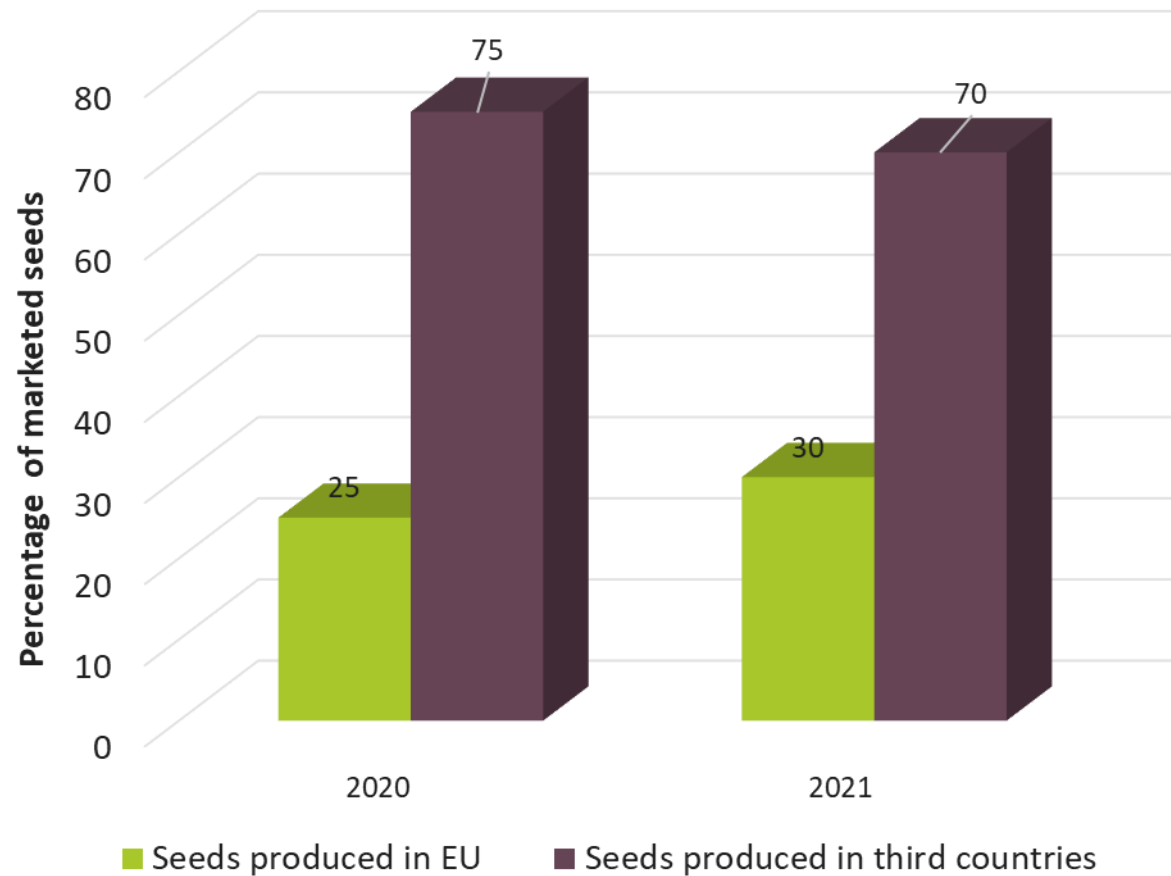
Tomato seeds marketed in 2021



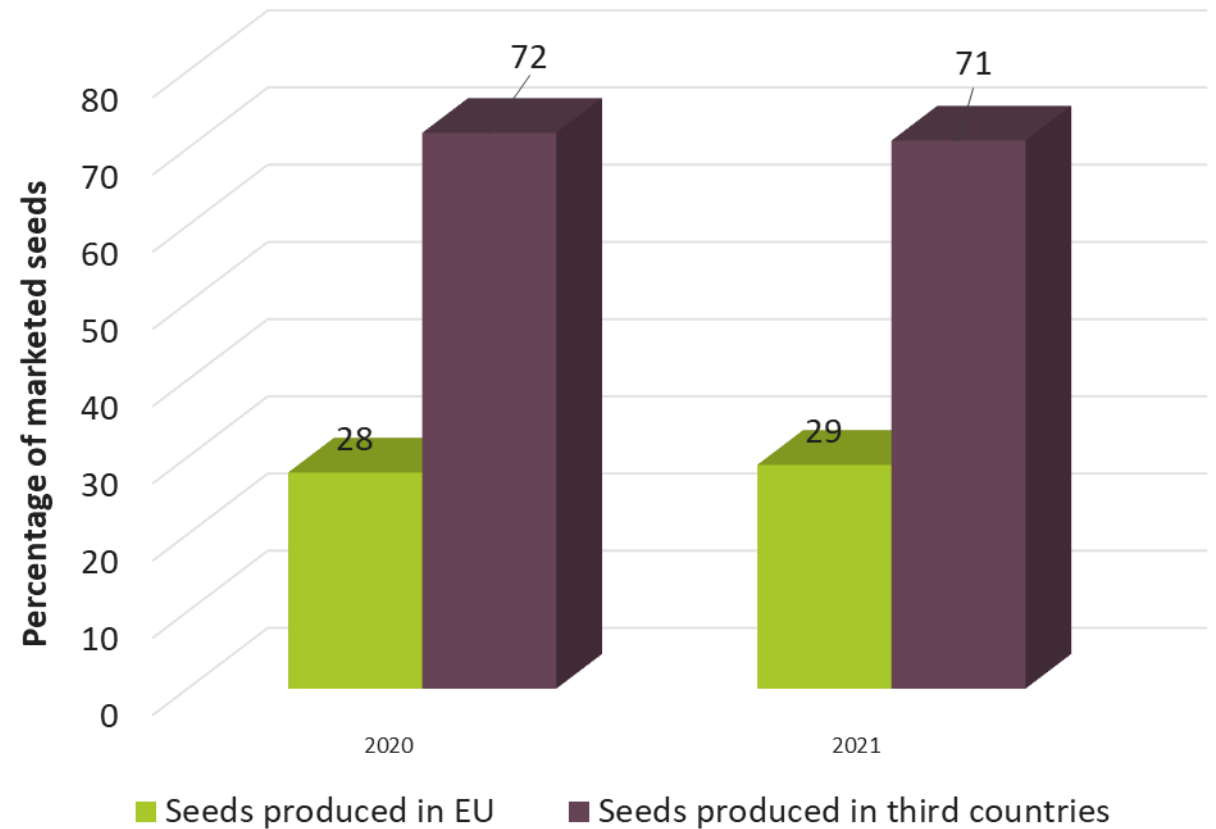
Marketed seeds produced from	EU	third countries	Total Quantity marketed in EU
Seeds for fresh produce	640	1510	2150
Seeds for processed tomato	390	150	540
Total quantity of seeds	1030	2460	3490

Comparison of tomato seeds marketed between 2020 and 2021

Tomato seeds for fresh produce



Tomato seeds for processed tomato



Tomato Seed marketing in 2020 and 2021

- At least 70% of the tomato seeds marketed in the EU are produced from third countries
- About 8% increase in tomato marketed in 2021 compared to 2020
- About 1- 5% increase in quantity of tomato produced in the EU and marketed in the EU in 2021 compared to 2020

ToBRFV varieties and affordability

- Breeding companies are investing considerable resources to rapidly bring new tomato resistant varieties to the market.
- Currently, there are already over 160 varieties commercially available or in the process of registration in the EU
- The number is expected to triple in the coming year and in two years' time 80-90% of tomato varieties on the EU market will have ToBRFV resistance
- The demand is high, and growers are switching quickly to resistant varieties
- Resistant varieties will slow down the spread of the virus and reduce the economic impact to growers.
- Sharing data on resistant varieties is still challenging because:
 - Varieties that are officially registered on the EU Common Catalogue may not officially indicate ToBRFV resistance due to the absence of a validated standard official protocol that can be used at national level
 - Only sensitive company data is available which cannot be shared and thus impacting determination of market value



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