Spanish contribution

- Balance of the winter campaign
- Estimation for the summer campaign
- Consumers preference and consumption
- Level of organisation
- Extra-EU suppliers
- ToBRFV virus



EU FRUIT AND VEGETABLES MARKET OBSERVATORY

SUBGROUP TOMATOES

21st June 2024

COAG FEPEX COEXPHAL

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Balance of the winter campaign

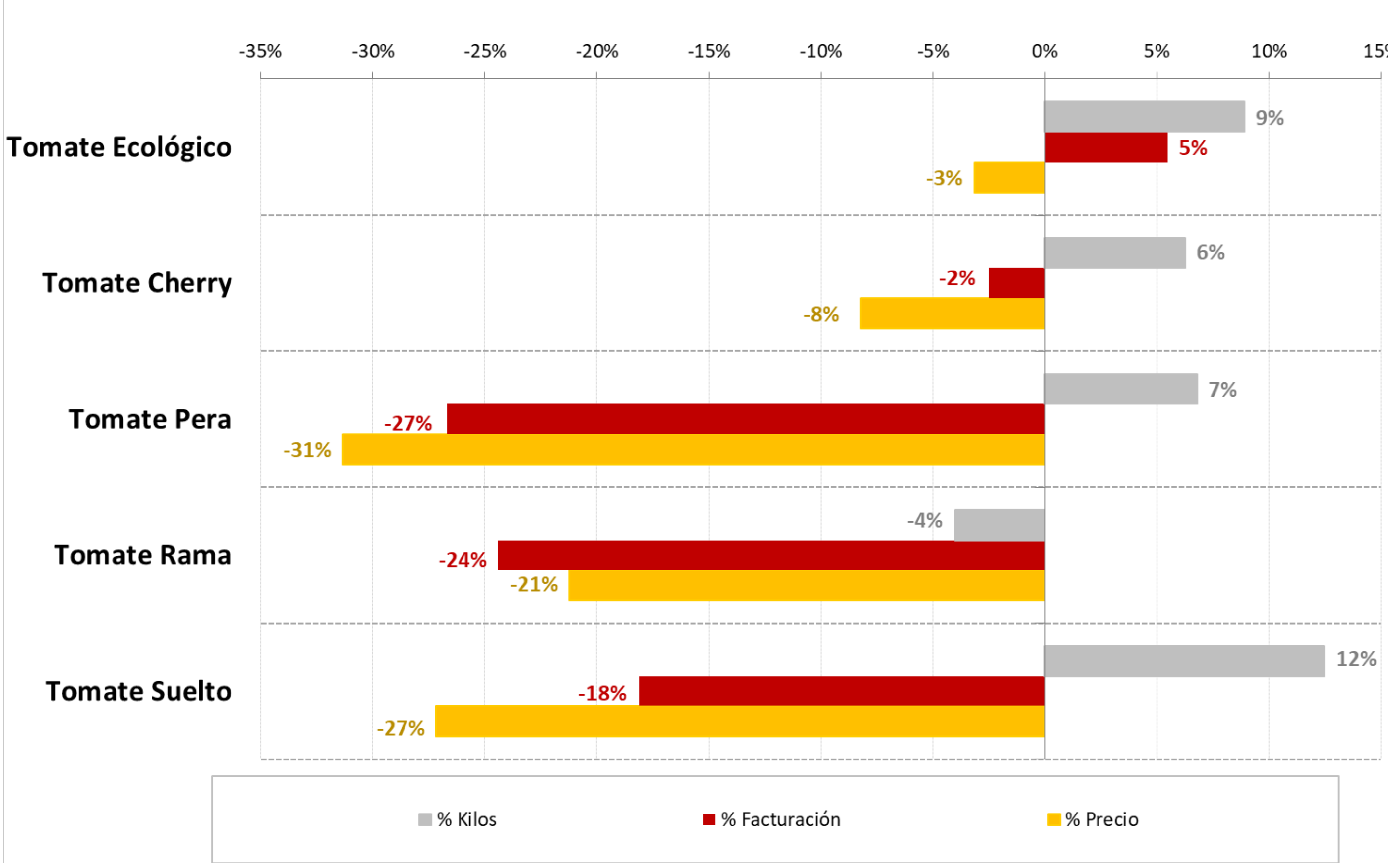
WINTER PRODUCTION	2020/21	2021/22	2022/23	2023/24	forec 24/25
Production fresh tomatoes (tonnes)	**1.402.296**	**1.245.558**	**1.204.896**	**1.265.141**	**1.233.512**
% organic	8	9	11	12	14
% non-organic	92	91	90	89	86
% greenhouse	100	100	100	100	100
% open field	0	0	0	0	0
%Round tomatoes	34	33	29	28	27
%Vine tomatoes	23	23	25	24	25
%Other tomatoes (cherry, mini-type…)	43	44	46	48	48
% destined to national market	57	54	53	53	51
% destined to exports EU	42	45	45	45	47
% destined to exports non-EU	1	1	2	2	2
Surface fresh tomatoes (ha)	**14.417**	**13.569**	**13.989**	**14.269**	**13.983**
% organic	10	11	12	13	15
% non-organic	90	89	88	87	85
% greenhouse	100	100	100	100	100
% open field	0	0	0	0	0
%Round tomatoes	34	30	29	29	27
%Vine tomatoes	22	24	26	25	26
%Other tomatoes (cherry, mini-type…)	44	46	45	46	47
% destined to national market	59	56	56	56	55
% destined to exports EU	40	43	43	43	44
% destined to exports non-EU	1	1	1	1	1

Estimation for the summer campaign

SUMMER PRODUCTION	2020	2021	2022	2023	forecast 2024
Production fresh tomatoes (tonnes)	**593.362**	**555.979**	**550.000**	**450.000**	**535.500**
% organic	4	4	5	6	7
% non-organic	96	96	95	94	93
% greenhouse	21	20	18	19	20
% open field	79	80	82	81	80
%Round tomatoes	27	25	24	23	22
%Vine tomatoes	26	27	27	28	29
%Other tomatoes (cherry, mini-type…)	47	48	49	49	49
% destined to national market	83	83	83	82	82
% destined to exports EU	13	14	14	15	15
% destined to exports non-EU	4	3	3	3	3
Surface fresh tomatoes (ha)	**8.188**	**7.366**	**7.454**	**7.000**	**7.560**
% organic	4	5	6	7	8
% non-organic	96	95	94	93	92
% greenhouse	21	20	20	19	20
% open field	79	80	80	81	80
%Round tomatoes	27	26	25	23	23
%Vine tomatoes	26	27	26	29	30
%Other tomatoes (cherry, mini-type…)	47	47	49	48	47
% destined to national market	84	83	82	82	82
% destined to exports EU	13	14	15	15	15
% destined to exports non-EU	3	3	3	3	3

Balance of the winter campaign 2023-24 (sep-may)

VARIATION: 5% volume; -32% Price



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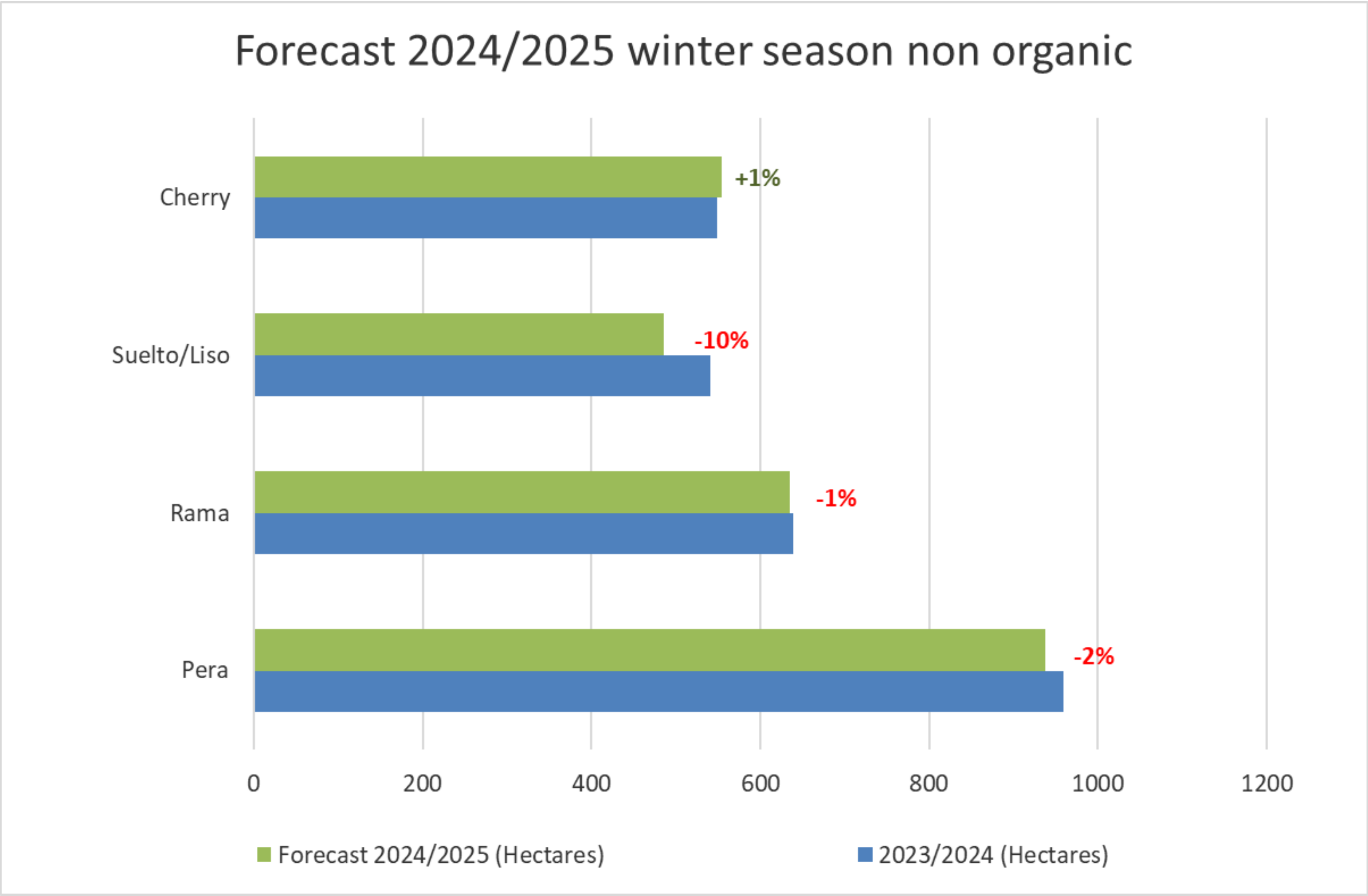
EU FRUIT AND VEGETABLES MARKET OBSERVATORY
SUBGROUP TOMATOES



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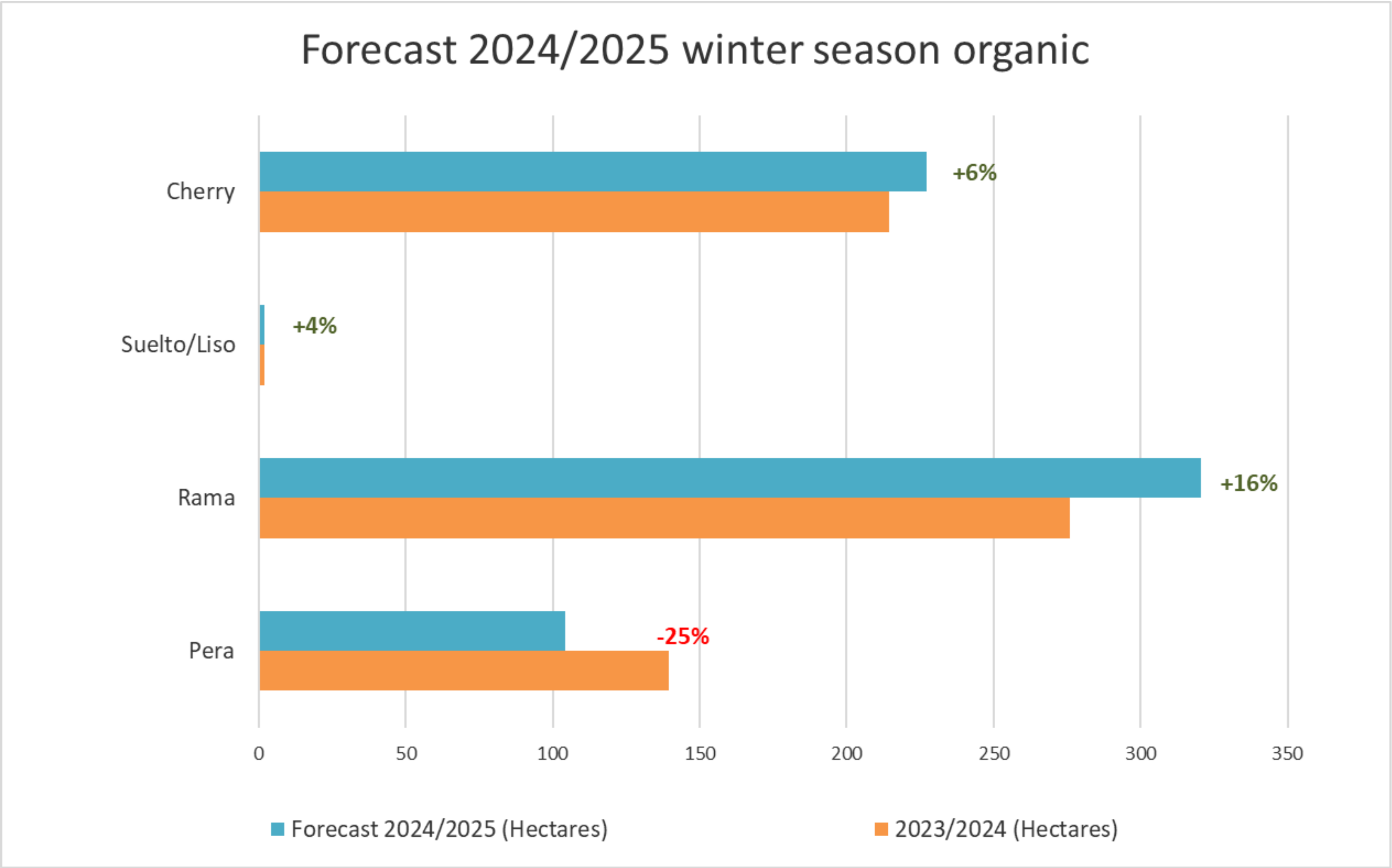
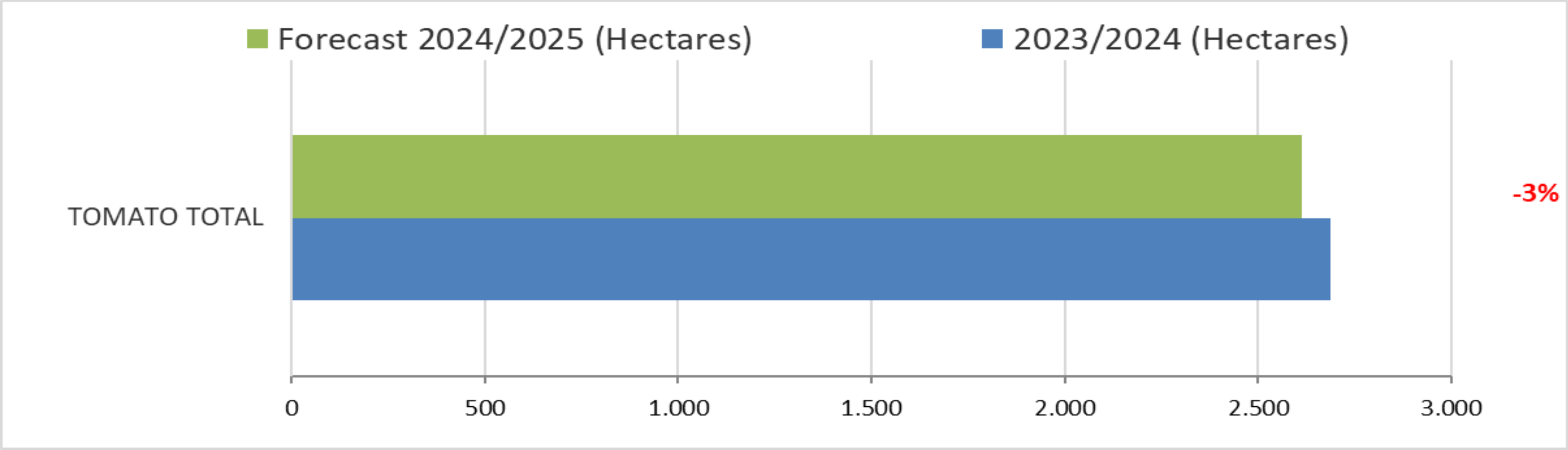
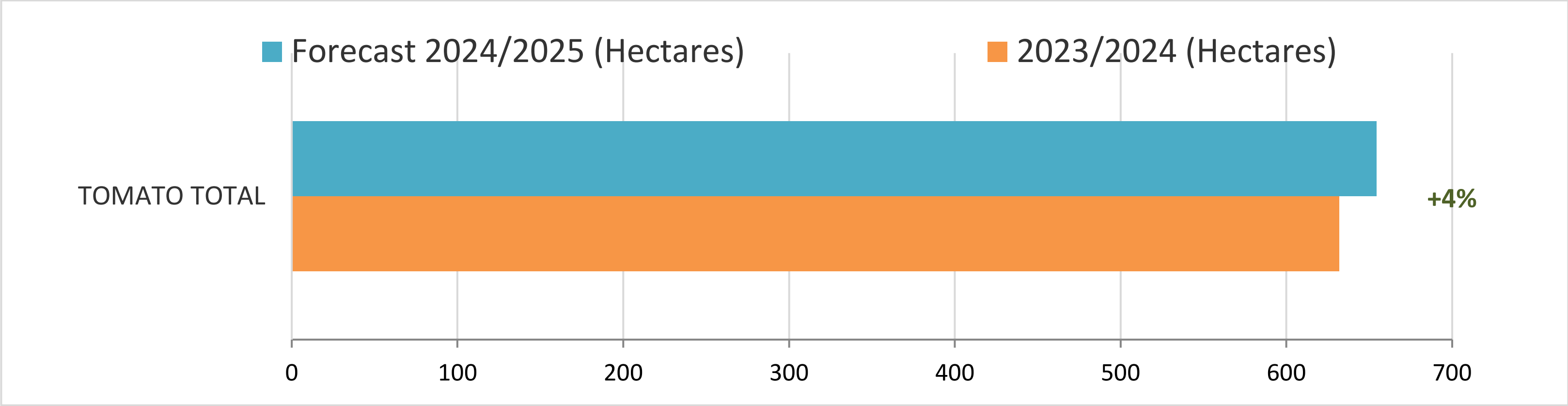


EU FRUIT AND VEGETABLES MARKET OBSERVATORY
SUBGROUP TOMATOES

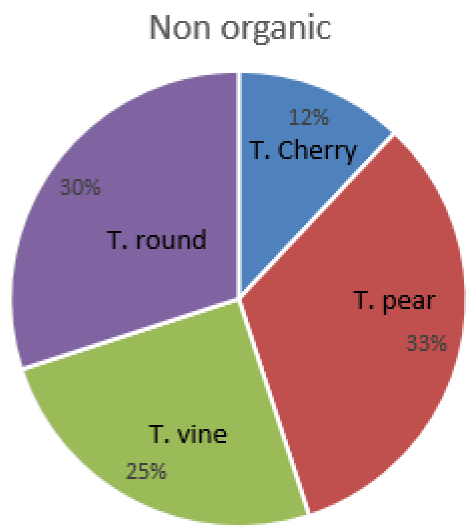
NON ORGANIC

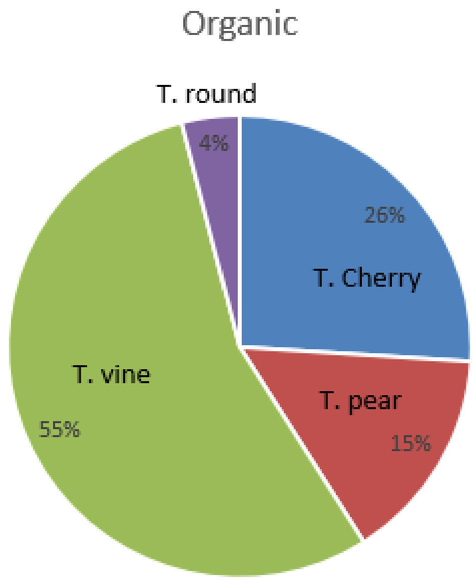


ORGANIC



Forecast tomato 2024/2025





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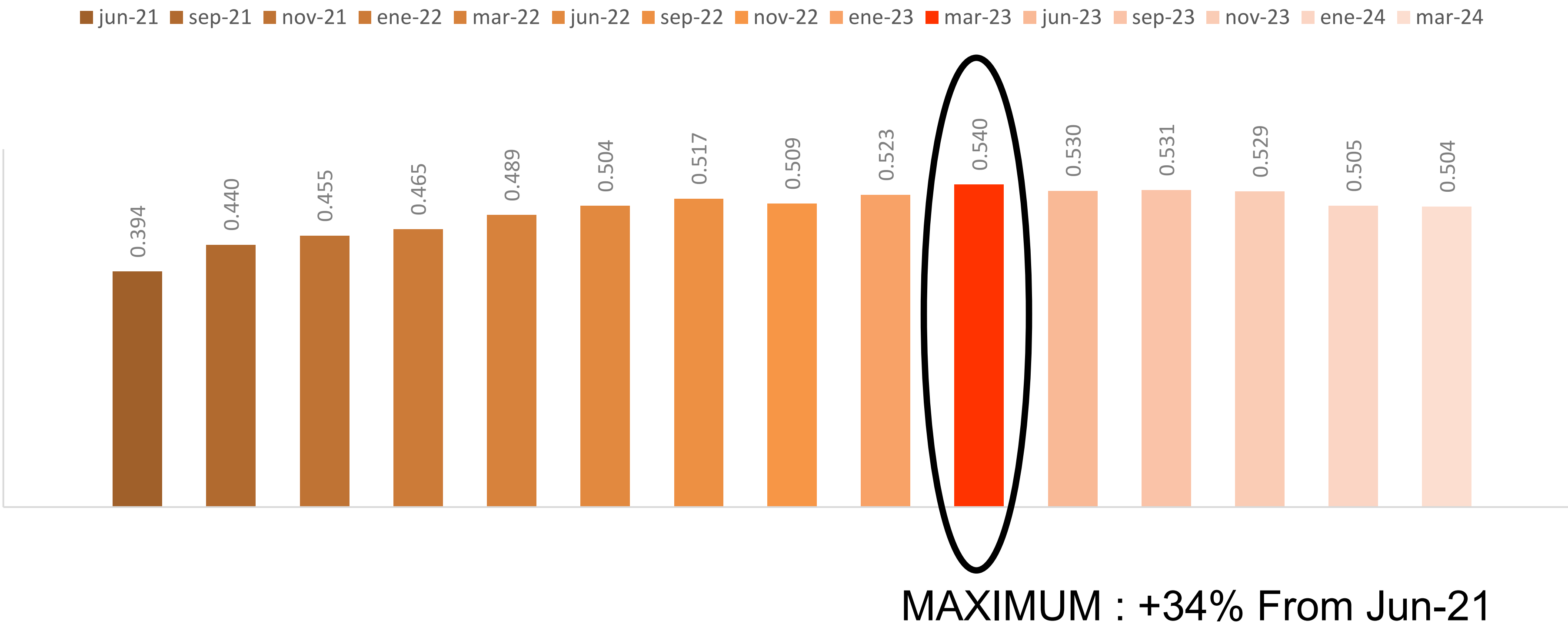
EU FRUIT AND VEGETABLES MARKET OBSERVATORY
SUBGROUP TOMATOES

EVOLUTION OF THE COST OF PRODUCTION (€/KG): ACUMULATIVE FROM JUN 2021 – MARCH 2024



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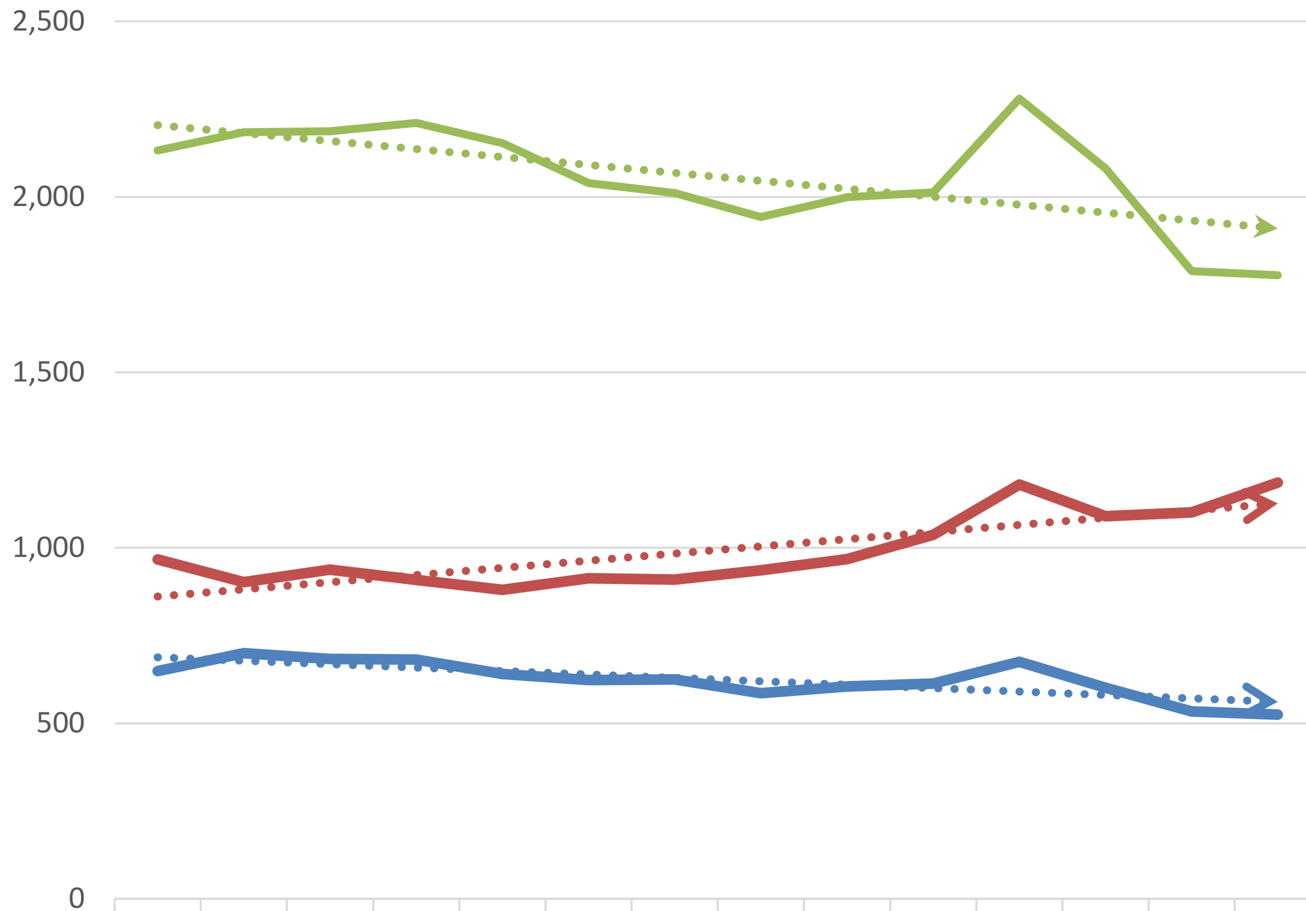
unidosexportandofuturo

Evolution of annual consumption of fresh tomato and vegetables(excluding tomato) in Spanish households

The negative evolution is observed in all vegetables

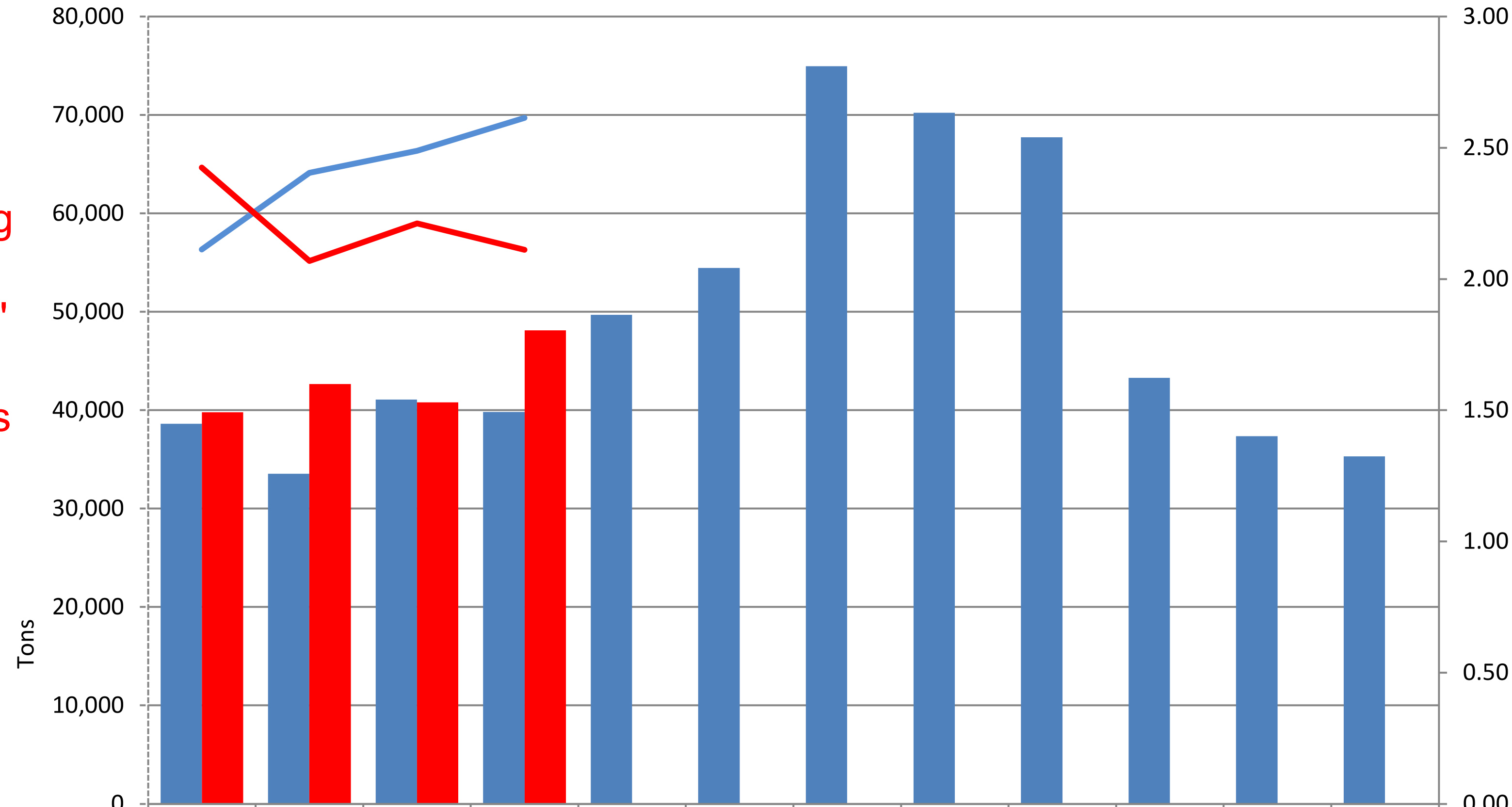


	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Tomato - thousands of tons	649	700	684	681	641	624	625	586	605	613	676	601	534	525
Tomato - millions of euros	967	903	938	909	880	913	910	936	968	1,037	1,180	1,090	1,101	1,186
Vegetables - thousands of tons	2,132	2,184	2,187	2,210	2,154	2,040	2,011	1,942	1,999	2,013	2,280	2,081	1,789	1,777

Source: MAPA, dec 2023 estimate

Monthly consumption of tomato in households and out-of-home in 2023-2024

The determining factor in consumers' purchasing decisions is the price

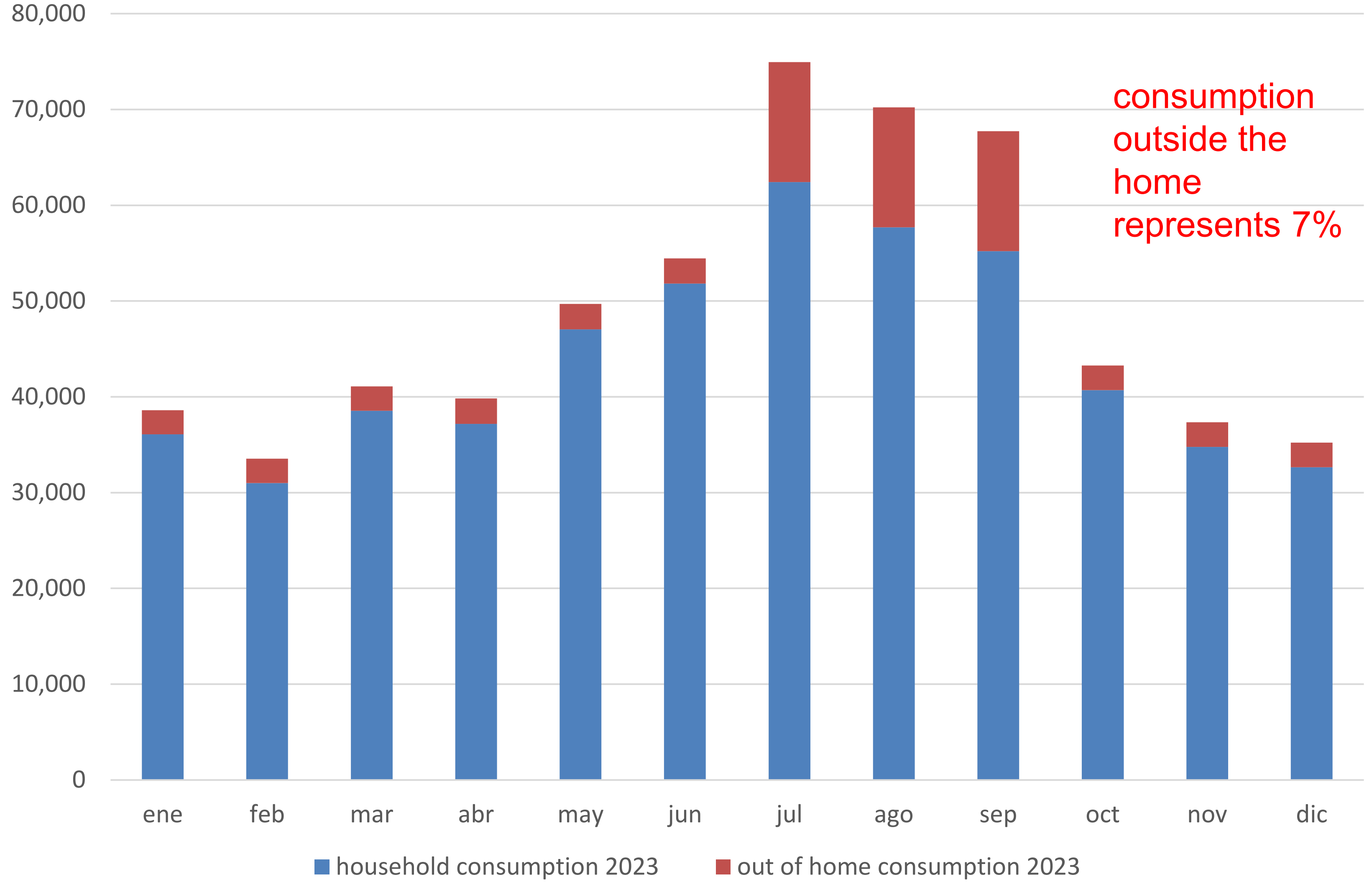


	ene	feb	mar	abr	may	jun	jul	ago	sep	oct	nov	dic
Total consumption 2023	38,614	33,543	41,095	39,829	49,706	54,461	74,951	70,219	67,743	43,276	37,354	35,300
Total consumption 2024	39,800	42,650	40,795	48,100								
Average price 2023	2.11	2.40	2.49	2.61								
Average price 2024	2.42	2.07	2.21	2.11								

* Dec 2023 and jan-apr 2024 , FEPEX estimate

FEPEX

Monthly consumption of tomato in households and out-of-home in 2023

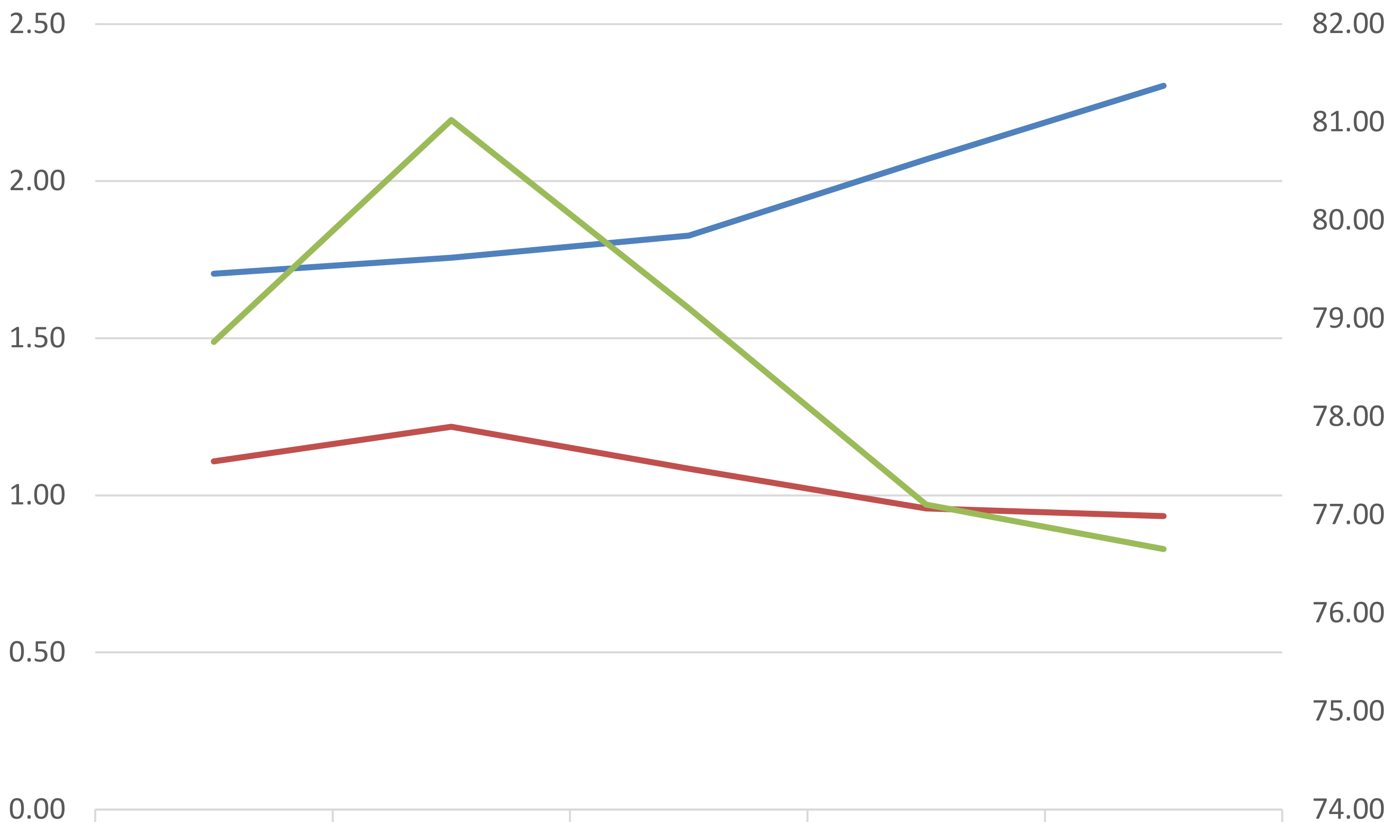


* Dec 2023, FEPEX estimate

FEPEX

Evolution of per capita consumption, average prices and penetration per year in household

Prices increase, consumption and penetration decrease, with the exception of the year of the pandemic

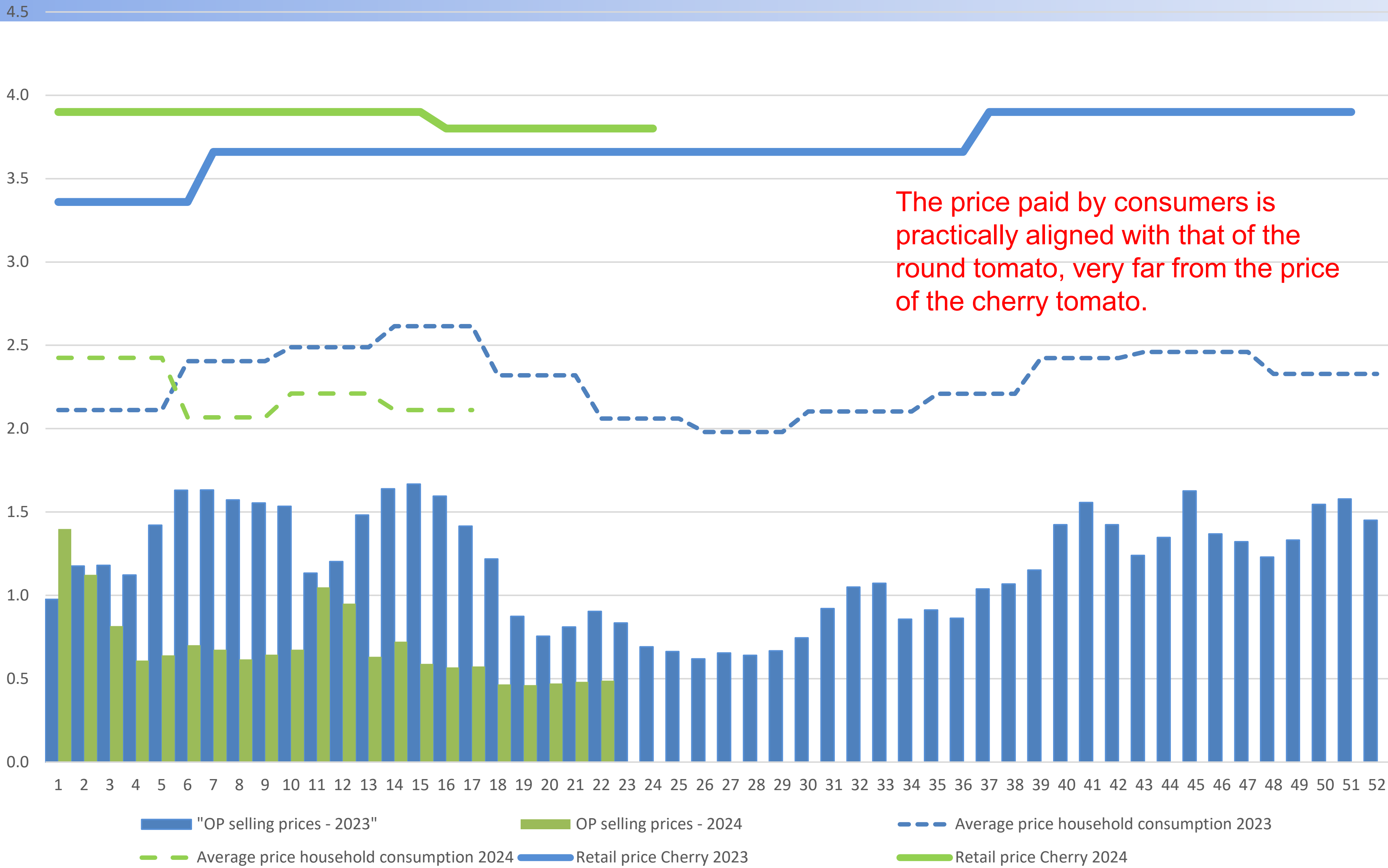


	2019	2020	2021	2022	2023
€/KG AVERAGE PRICE	1.71	1.76	1.83	2.07	2.30
KGS PER CAPITA CONSUMPTION	1.11	1.22	1.09	0.96	0.93
% HOUSEHOLD PENETRATION CONSUMPTION	78.76	81.02	79.10	77.11	76.65

Source: MAPA, dec 2023 FEPEX estimate

FEPEX

Bars: OP selling prices - Average Spain - Round tomato 57-100mm - €/kg
Lines: Average household price consumption - €/kg – Average cherry retail price



FEPEX

Level of production in producers organizations

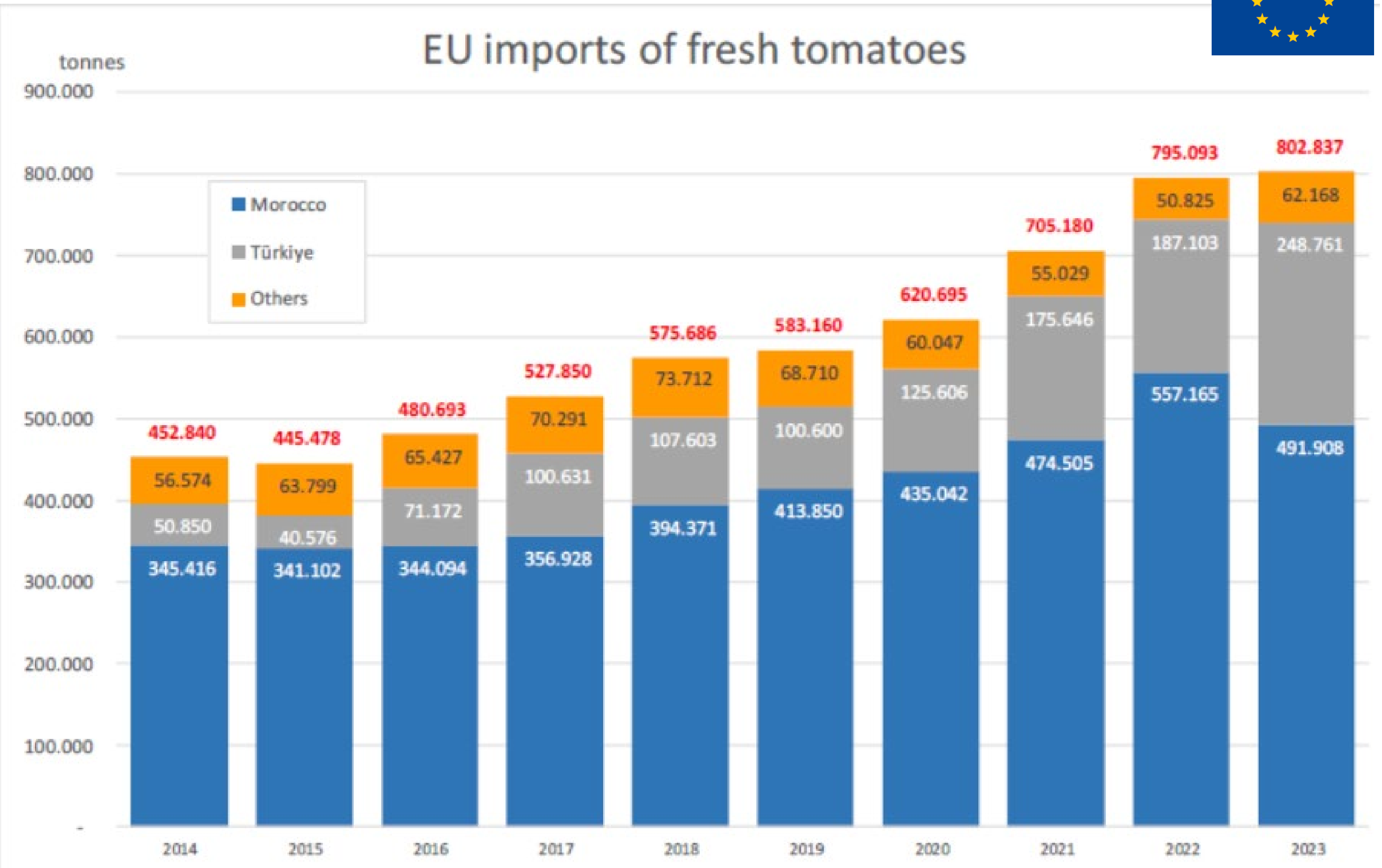
		2016	2017	2018	2019	2020	2021	2022	2022 vs 2021	2022 vs Media
Nacional	**% integración**	**30,26 %**	**41,16 %**	**40,72 %**	**43,56 %**	**39,06 %**	**42,48 %**	**40,72 %**	**-4%**	**-2%**
	Nº Ops	**90**	**94**	**94**	**95**	**92**	**100**	**94**	**-6%**	**-1%**
Andalucía	% integración	23,49 %	34,37 %	36,38 %	36,40 %	38,00 %	42,22 %	36,68 %	-13%	-2%
	Nº Ops	33	35	35	36	35	39	39	0%	8%
Granada	% integración	3,91 %	17,57 %	17,55 %	16,64 %	18,09 %	20,80 %	17,21 %	-17%	-5%
	Nº Ops	4	5	5	5	5	6	6	0%	15%
Almería	% integración	33,10 %	44,92 %	47,79 %	46,48 %	49,49 %	55,38 %	50,10 %	-10%	3%
	Nº Ops	27	29	28	29	28	30	29	-3%	1%
Com. Valenciana	% integración	68,57 %	84,39 %	71,45 %	61,71 %	57,41 %	39,82 %	38,24 %	-4%	-39%
	Nº Ops	6	8	6	6	6	6	7	17%	9%
Murcia	% integración	73,32 %	74,23 %	94,93 %	61,52 %	78,84 %	72,92 %	70,87 %	-3%	-7%
	Nº Ops	16	17	20	18	16	13	12	-8%	-29%

Big differences between producing regions

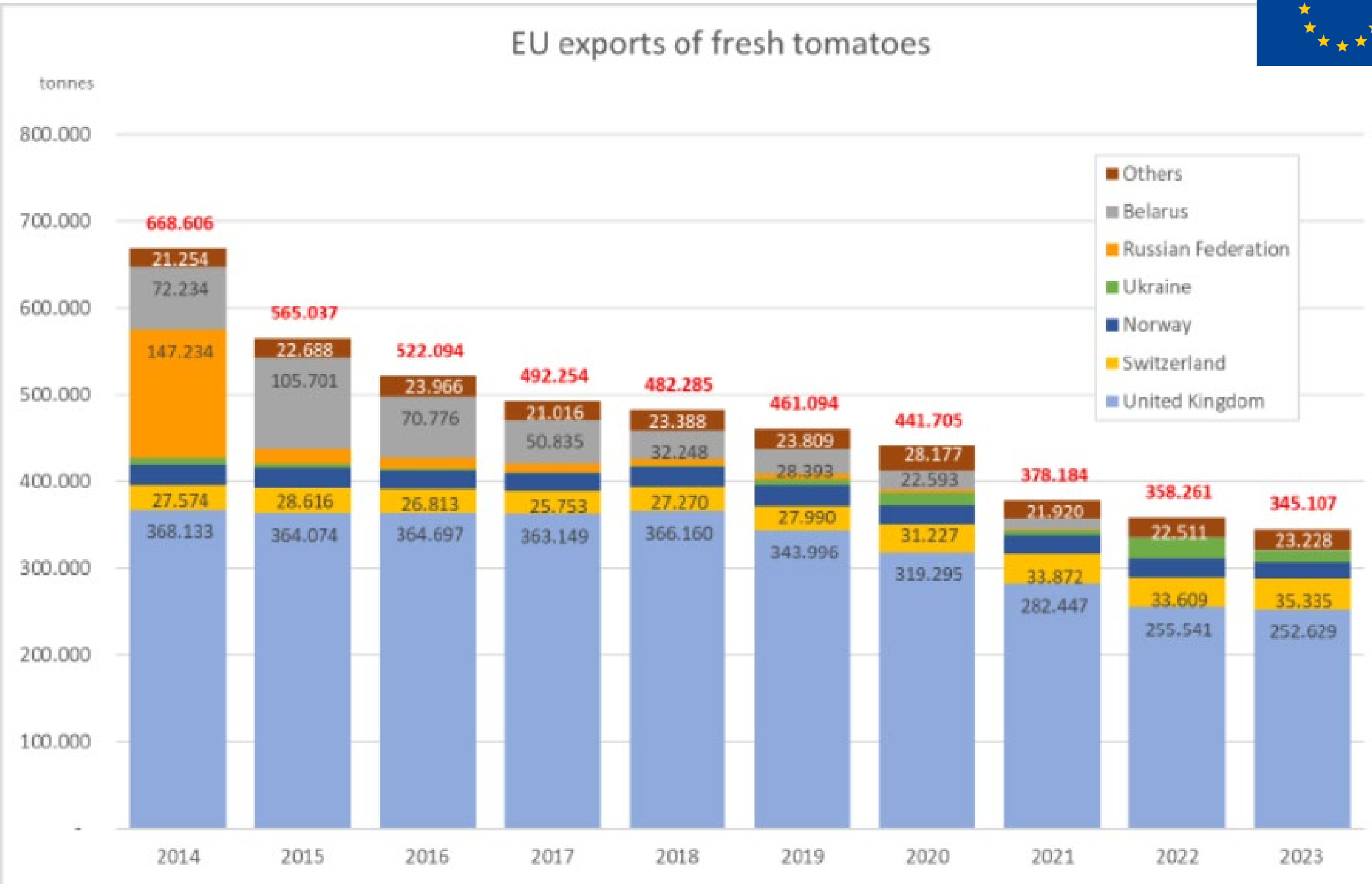
Fuente: SOFYH_MAPA

FEPEX

Competitiveness of the other extra-EU suppliers

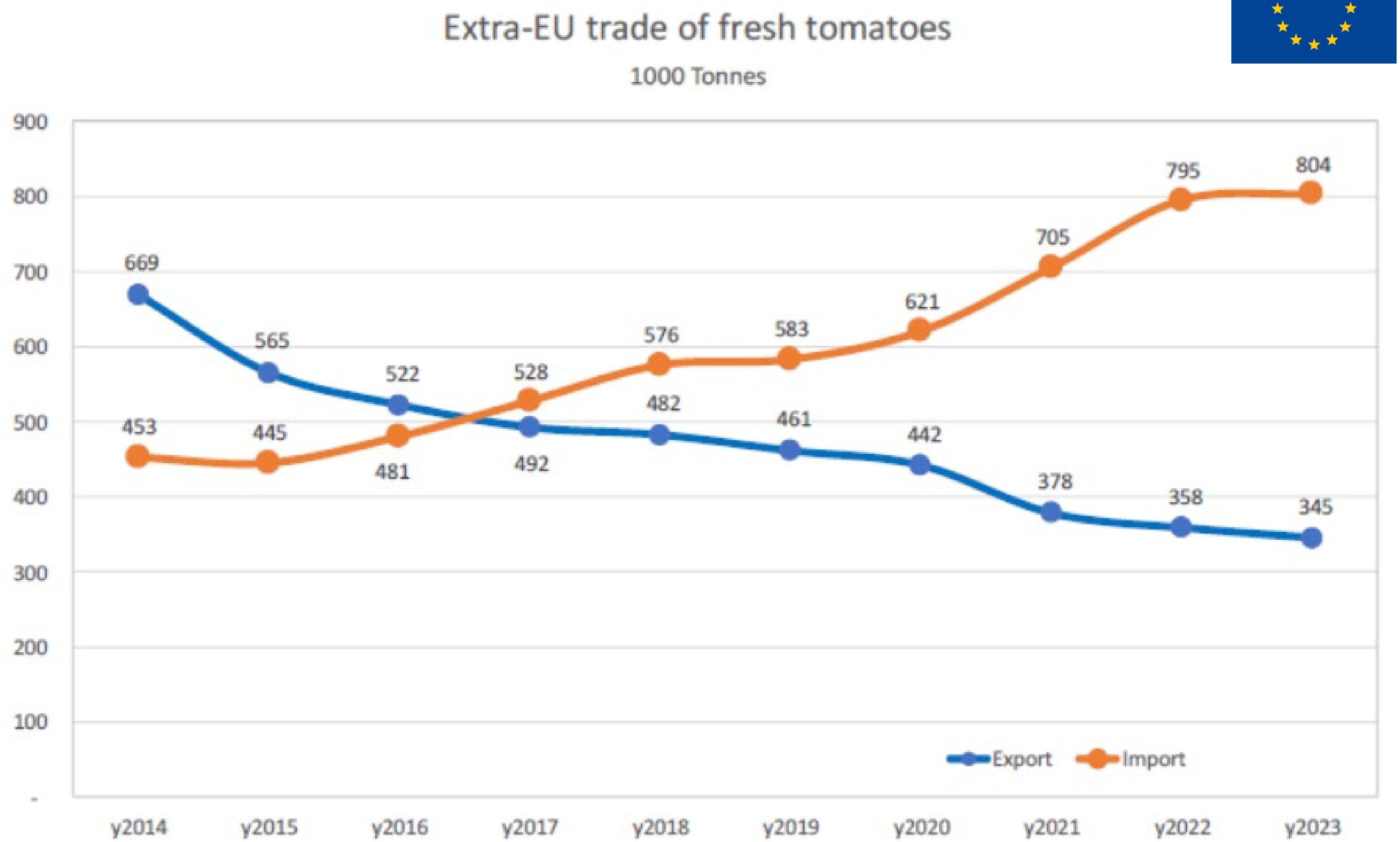


Competitiveness of the other extra-EU suppliers



Source: Eurostat Comext, 19 March 2024

Competitiveness of the other extra-EU suppliers



Source: Eurostat - COMEXT, 13/03/2024

Competitiveness of the other extra-EU suppliers

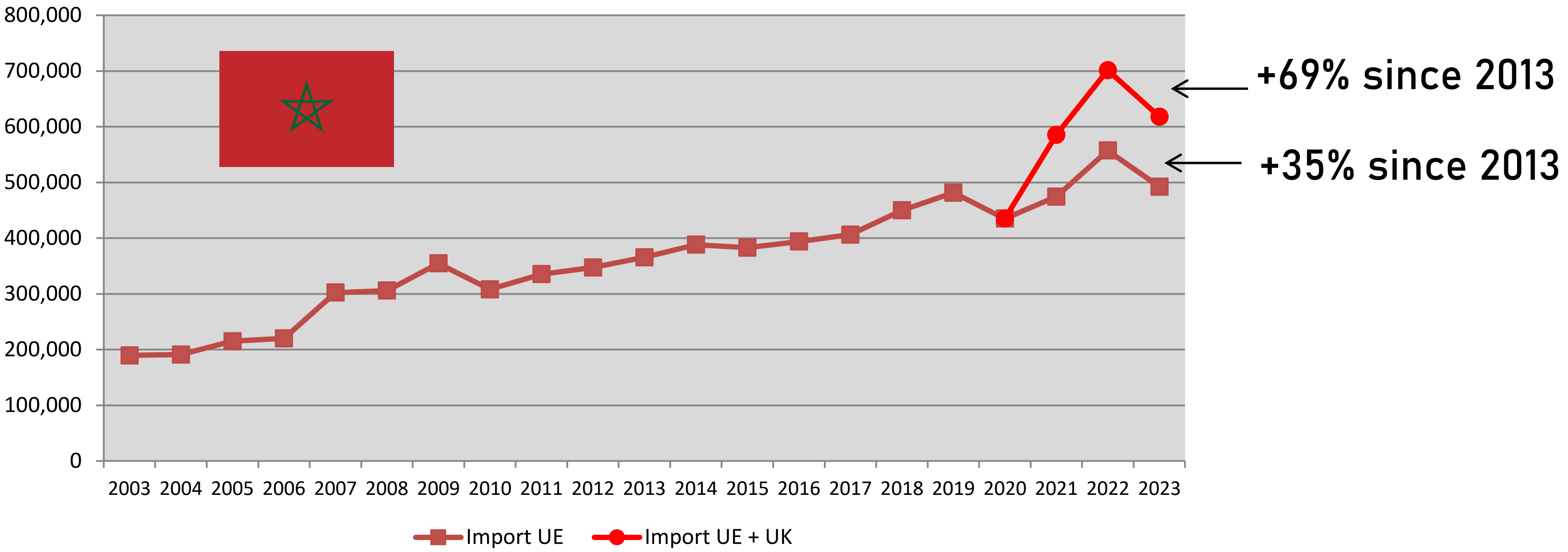
Over the period 2022-2035, the EU is expected to maintain its current net importing position in tomatoes for fresh consumption. However, as in other sectors, there could be increasing competition from other global producers which could impact some tomato growers (who may, for example switch to other crops), although these non-EU suppliers are expected to face the same challenges in terms of pests and climate change as producers in the EU. On processed tomatoes, there is no change

EU Agricultural Outlook 2023-35 report

→ Not a future impact, it is impacting now

Competitiveness of the other extra-EU suppliers

Imports from Morocco



- **Production problems in 2023/24**: plants and water availability, heat and pests
- **Exportation record** in 2022/23: 716,700 tons.
- **Increase of production costs**: 30% (inputs, fertilizers…)
- Important impact of **diseases and pests.** <u>ToBRFV</u> is present and affecting
- **Western Sahara production**: recent developments (labelling and control)

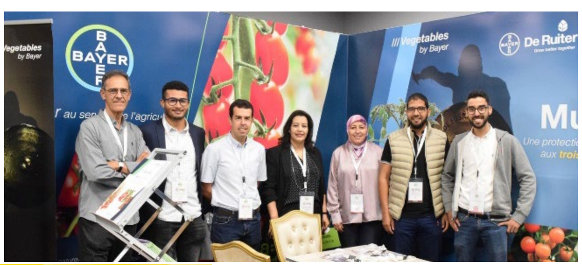
Competitiveness of the other extra-EU suppliers

IMPORTING TOMATOES, EXPORTING SERVICES

MOROCCO TOMATO CONFERENCE | 30 MAI 2024
LES DUNES D'OR CONGRESS HALL - AGADIR

PROGRAM

		SPEAKER	COMPANY	COUNTRY
		Master of ceremonies : Driss Soufiani - Maroc Kenz Consulting		
7:30	Registration & welcoming of delegates			
8:30	Opening speeches			
9:00	History & Perspectives of the Moroccan Tomato sector	Said Ouraich	Duroc	Morocco
	SESSION 1: TOMATO MARKET TRENDS	Moderating: Mariska DrESchler - GreenTech		
9:25	Tomato Export Dynamics: Exploring Country-Specific Data	Ali Rougui	Morocco Foodex	Morocco
9:50	A Comprehensive Analysis of the Tomato Market, its Current Obstacles, and Strategic Responses in Europe and Beyond	Dr Hans-Christoph Behr	AMI	Germany
10:35	Tomato marketing, branding and markets	Fabio Coullet	Agrichains	Spain
10:56	Q&A (20 min)			
11:15	Coffee & Networking (20 min)			
	SESSION 2: CUTTING EDGE TECHNIQUES TOWARD PERFORMANCE	Moderating: Fouad Ababou - Hoogendoorn		
11:40	Enhance crop growth and increase production with mid-tech greenhouses and AI-driven solutions	Stijn Weijns / Lotte Adema	Agrocare / Source.ag	The Netherlands
12:20	Unveiling the Strategic Vision for High-Tech Greenhouses in Morocco	Pr. Farid Lekjaa	Complexe Horticole d'Agadir	Morocco
12:45	Understanding the plant water needs	Peter Stradiot	Innogreen	Belgium
1:20	Development of sustainable resistances to ToBRFV	Gregori Bonnet	Syngenta	France
1:40	Q&A (20 min)			
2:00	LUNCH BREAK (1h)			
	SESSION 3 : PESTS AND DISEASES MANAGEMENT	Moderating: Laila Khouimi - Biobest		
3:05	Tomato brown rugose fruit virus: Current status and Future perspectives	Dr Nida' Salem	University of Jordan	Jordan
3:45	Properties of ToBRFV and hygiene	Adriaan Vermunt	Normec Groen Agro Control	The Netherlands
4:05	Coffee & Networking (20 min)			
4:30	Practical keys to succeed in integrated pest management against Tuta absoluta on long-cycle tomato crops in Morocco	Said Amazouz	Consultant privé	Morocco
5:00	The combined effect of Trichoderma harzianum and Nesidiocoris tenuis inoculation on water stress in tomato	Dr Alberto Urbaneja	IVIA	Spain
5:25	New sustainable pest management methods in tomato crop	Dr Meritxell Pérez-Hedo	IVIA	Spain
5:45	Q&A (20 min)			
6:15	Conference ending and recommendations			



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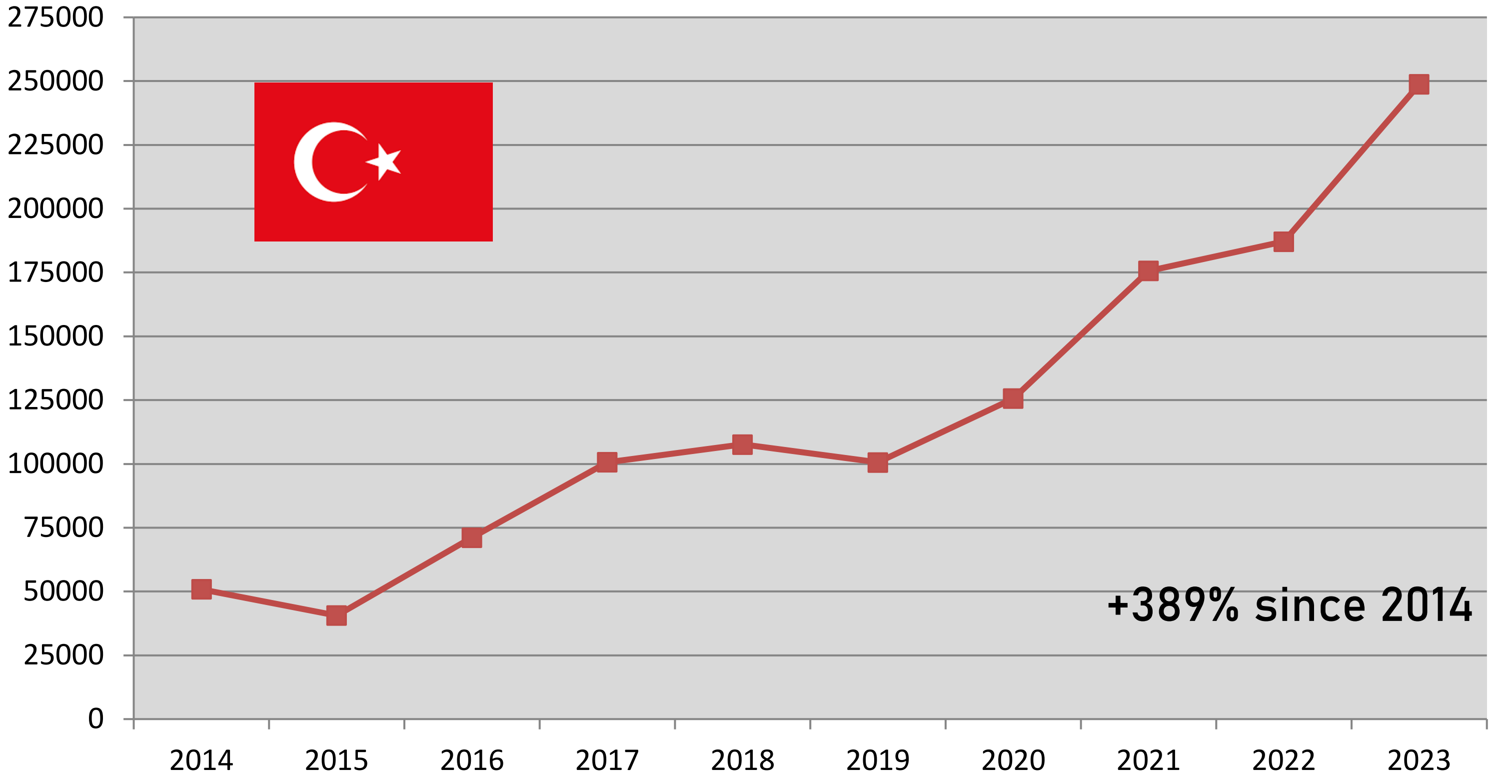
Morocco tomato conference – Agadir 30 May 2024

Competitiveness of the other extra-EU suppliers

Imports from Turkey



- Increase of exports in spite of announcement of Turkey bans tomato exports March - mid-April 2023

Competitiveness of the other extra-EU suppliers

→ **Increase of production cost** in Spain +40% 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)

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Update on the Tomato brown rugose fruit virus (ToBRFV)

NO RELEVANT CHANGES

→ The virus is **present but still controlled.** Situation stabilised

→ **High concern** in case it spreads, as with every virus. No effective tools are available at the moment.

→ Need for **public research** for control tools

→ **Exhaustive control measures** taken: prophylaxis, research for new varieties (possible misleading advertising)…

→ Very important in **seeds** (imports).

Thank you for your attention