

**TomatoEurope**

PROCESSORS ASSOCIATION

**Thursday , June 17, 2021  
Fruit & Vegetable Market Observatory  
Sub-group Tomatoes**

**Forecast 2021  
tomatoes for processing**

**The 2021 European production forecast indicates a return to the historical averages of the sector, after the temporary decline in 2020**

# EU Processing tomatoes

## Forecast- Crop 2021

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

	Average 2015/2020	2019 FINAL	FINAL 2020	FORECAST 2021	VARIATION 2021 vs 2020	VARIATION 2020 vs 2019	VARIATION 2021 vs average 2015/2020
Italy	5.123	4.801	5.166	5.400	4,5%	7,6%	5,4%
Spain	3.108	3.200	2.650	3.100	17,0%	-17,2%	-0,3%
Portugal	1.470	1.410	1.262	1.400	10,9%	-10,5%	-4,7%
Greece	413	400	420	460	9,5%	5,0%	11,3%
France	175	154	136	137	0,7%	-11,7%	-21,9%
<b>TOMATO EUROPE</b>	<b>10.289</b>	<b>9.965</b>	<b>9.634</b>	<b>10.497</b>	<b>9,0%</b>	<b>-3,3%</b>	<b>2,0%</b>
Malta	8	8	8	8	0,0%	0,0%	-2,0%
Bulgaria	47	40	40	40	0,0%	0,0%	-14,3%
Czech Republic	25	25	25	25	0,0%	0,0%	0,0%
Hungary	99	100	82	100	22,0%	-18,0%	1,4%
Poland	197	175	175	175	0,0%	0,0%	-11,0%
Slovakia	20	20	20	20	0,0%	0,0%	0,0%
Croatia	10	10	10	10	0,0%	0,0%	0,0%
<b>Total EU</b>	<b>10.695</b>	<b>10.343</b>	<b>9.994</b>	<b>10.875</b>	<b>8,8%</b>	<b>-3,4%</b>	<b>1,7%</b>
<b>Iberian peninsula</b>	<b>4.578</b>	<b>4.610</b>	<b>3.912</b>	<b>4.500</b>			
<i>% european production</i>	<b>42,8%</b>	<b>44,6%</b>	<b>39,1%</b>	<b>41,4%</b>			

## Big trend 2021 (1)

- **The pandemic** has led to an increase in the consumption of tomato products throughout Europe, despite the HORECA crisis.
- It is reasonable to think that, also due to the predictable rapid restart of the Food Service, the growth of consumption will remain throughout 2021

## Big trend 2021(2)

**Collapse of available stocks\***, which corresponds to a significant but not sufficient increase in production, with a substantial return to historical productions\*\*.

*\* The first data in our possession on semi-annual disappearance in many European factories indicates a strong exit of tomato-based products, with a stock level that is significantly lower than the physiological needs.*

*\*\* We should consider whether the availability of land to produce tomatoes for processing in the main production areas is reaching the limit of its capacity*

## Big trends 2021 (3)

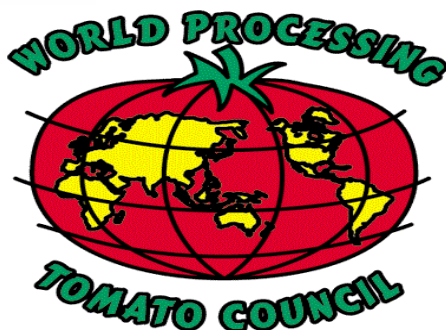
- **World production is stable due to the EU growth and the simultaneous decline in the USA (California) and in China**
- Decline in the USA (California) due to irrigation availability problems
- China's decline has been caused by the drop of the European demand due to the sanctions and measures adopted in Europe by Governments and companies in relation to the Xinjiang Uyghur humanitarian crisis in the region of Xinjiang and by the enormous increase in the costs of sea freight (even tenfold!)\*.

*\*However, local markets are currently developing and growing in China.*



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# *2021 world production forecast of tomatoes for processing (in 1000 metric tonnes)*

*Estimate at June 1, 2021*

## Major producing countries and total world production (forecast 2021 x.000 tons)

	Average 2015/2020	2019 FINAL	FINAL 2020	FORECAST 2021	VARIATION 2021 vs 2020	VARIATION 2020 vs 2019	VARIAZIONE 2021 vs average 2015/2020
California	10.223	10.144	10.258	10.523	2,6%	1,1%	2,9%
Italy	5.123	4.801	5.166	5.400	4,5%	7,6%	5,4%
China	5.604	4.600	5.800	4.800	-17,2%	26,1%	-14,3%
Spain	3.108	3.200	2.650	3.100	17,0%	-17,2%	-0,3%
Turkey	2.100	2.200	2.500	2.100	-16,0%	13,6%	0,0%
Iran	1.188	1.650	1.300	1.300	0,0%	-21,2%	9,5%
Portugal	1.470	1.410	1.262	1.400	10,9%	-10,5%	-4,7%
Brazil	1.404	1.200	1.421	1.500	5,6%	18,4%	6,9%
Chile	985	1.100	907	1.174	29,4%	-17,5%	19,2%
Tunisia	725	807	961	1.000	4,1%	19,1%	37,9%
Algeria	688	800	1.000	800	-20,0%	25,0%	16,4%
Ukraine	662	720	800	850	6,3%	11,1%	28,5%
Russia	381	552	515	550	6,8%	-6,7%	44,3%
Canada	437	434	438	450	2,7%	0,9%	3,0%
Egypt	337	400	420	440	4,8%	5,0%	30,7%
Greece	413	400	420	460	9,5%	5,0%	11,3%
Argentina	446	395	454	595	31,1%	14,9%	33,4%
USA excluding California	428	370	463	453	-2,2%	25,1%	5,9%
Others	2.176	2.200	1.655	1.924	16,3%	-24,8%	-11,6%
<b>WORLD</b>	<b>37.919</b>	<b>37.383</b>	<b>38.390</b>	<b>38.819</b>	<b>1,1%</b>	<b>2,7%</b>	<b>2,4%</b>



# EU vs World

## Tomatoes for processing

### Forecast 2021

	Average 2015/2020	2019 FINAL	ESTIMATION FINAL 2020	FORECAST 2021	VARIATION 2021 vs 2020	VARIATION 2020 vs 2019	VARIATION 2021 vs average 2015- 2020
European Union	10.695	10.343	9.994	10.875	8,8%	-3,4%	1,7%
Other Countries	27.224	27.040	28.396	27.944	-1,6%	5,0%	2,6%
GENERAL TOTAL	37.919	37.383	38.390	38.819	1,1%	2,7%	2,4%
% UE	28,2%	27,7%	26,0%	28,0%			

## Concluding remarks

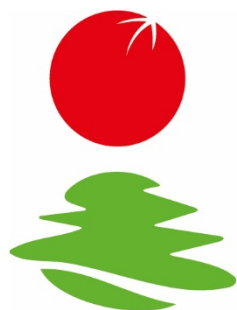
**Rising costs +**

**Rapid decline in stocks +**

**Consolidation of consumption growth =**

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**Possible pressure on the prices of  
tomato-based products**



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**Thanks for your attention**