Meeting summary

22 October 2021

A meeting of the tomato sub-group of the Fruit and Vegetables Market Observatory took place on 22 October

For processed tomatoes, EU producers have had a very good campaign compared to the 2020 harvest and the initial 2021 forecast (11.8M tonnes registered vs 9.9M tonnes in 2020), particularly in Italy, Iberian peninsula and in France. The EU production has increased by 17.9% year on year and has reached for the first time 30% of the world production of processed tomatoes. There is a decrease of the Californian production (-5.9%) and Chinese production (-17%), so the world production registers only a minor increase (+0.8%).

Experts note that the pandemic has led to an increase in consumption of tomato products in Europe. Also, the collapse of available stocks after the lower 2020 crop caused an increase in imports in the months immediately preceding the 2021 harvest. During the last years a significant increase of the Ukrainian exports of tomato paste to the EU has been observed, although their production is stable in 2021. The sector is also facing an unusual situation of uncertainty regarding the climate, making short-term forecasts difficult. Experts also note other difficulties such as the price increase for energy, packaging, freight, transport, and the risk of carbon leakage.

As regards fresh tomatoes, experts noted a decrease of the tomato surfaces for summer production in Spain, hence a reduction of production of table tomatoes in 2021. The forecasts regarding the winter period seem to follow the same tendency, confirming the decreasing trend over the last 5 years. The total greenhouse surface remains stable, but part of the tomato production is replaced by other crops such as cucumbers, peppers or zucchinis.

Experts indicated a slight diminution of the total volume of production of fresh tomatoes in France compared to the two previous years, due to unfavourable weather conditions, the change to crops of smaller size fruits and an increase of the organic surfaces.

Experts also confirmed the trend of switching to specialised varieties and smaller size products in the Netherlands, as well as the switching to other crops like cucumbers and peppers.

Regarding the organic production of tomatoes, the estimations are 10% in Spain, 8% in France and 2% in the Netherlands.

The situation regarding the tomato brown rugose fruit virus was also discussed, experts indicating difficulties to accurately estimate the production affected given the quarantine measures. The Commission informed that Implementing Regulation (EU) 2020/1191 on this virus has just been amended by Regulation 2021/1809 of 13 October 2021.

For fresh production, increased energy costs and impact of phytosanitary measures will have as well an effect on the winter production and market prices, most probably making the markets very volatile at the beginning of 2022.

An update of the presentation made at the June Market Observatory on EU trade data of fresh tomatoes at Perpignan trade platform was provided.

An expert presented the situation in the EU of the price transparency for several varieties of fresh tomatoes with examples from different wholesale markets. The lack of homogeneity of the data obtained from different countries on prices/varieties/origins was highlighted. The sector has started to develop a platform allowing the comparison of the data.

In light of the impact of factors such as Brexit, policy changes, evolving consumer habits and new viruses, experts have difficulties making projections for the tomato sector and would like explore developing a model. The Commission already produces a short-term and medium-term outlook for tomatoes, based on trends and expert input. Modelling is difficult for fruit and vegetables, given the large impact of both climate and producer decisions. The experts were invited to further reflect on this issue during the next months.

The next meeting of the tomato sub-group of the Fruit and Vegetables Market Observatory (F&V MO) is foreseen in June 2022.