



**TomatoEurope**

PROCESSORS ASSOCIATION

**Friday , October 22, 2021  
Fruit & Vegetable Market Observatory  
Sub-group Tomatoes**

**Crop 2021  
Tomatoes for processing  
Final**

**UPDATED ON 28 October 2021**

## **Forecast June 17, 2021**

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

## **FINAL October 22, 2021**

**The European production** has, in fact, exceeded the forecasts, above all thanks to an extremely favorable season, particularly in Italy (and also in the Iberian Peninsula and in France if compared to the 2020 harvest).

# EU Processing tomatoes

## Final - Crop 2021

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

	Average 2015/2021	ESTIMATION FINAL 2020	FORECAST 2021	FINAL (provisional) 2021	VARIATION 2021 vs 2020	VARIATION FINAL vs FORECAST 2021	VARIATION 2021 vs average 2015/2021
Italy	5.162	5.166	5.400	6.050	17,1%	12,0%	17,2%
Spain	3.107	2.650	3.100	3.185	20,2%	2,7%	2,5%
Portugal	1.460	1.262	1.400	1.596	26,5%	14,0%	9,3%
Greece	420	420	460	420	0,0%	-8,7%	0,0%
France	176	136	180	164	20,6%	-8,9%	-6,8%
<b>TOMATO EUROPE</b>	<b>10.325</b>	<b>9.634</b>	<b>10.540</b>	<b>11.415</b>	<b>18,5%</b>	<b>8,3%</b>	<b>10,6%</b>
Malta	8	8	8	8	0,0%	0,0%	-1,8%
Bulgaria	46	40	40	40	0,0%	0,0%	-12,5%
Czech Republic	25	25	25	25	0,0%	0,0%	0,0%
Hungary	99	82	100	90	9,8%	-10,0%	-9,0%
Poland	194	175	175	175	0,0%	0,0%	-9,6%
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>10.727</b>	<b>9.994</b>	<b>10.918</b>	<b>11.783</b>	<b>17,9%</b>	<b>7,9%</b>	<b>9,8%</b>

**The production of the other main world producing countries has not been so positive and we think this will help to keep world production in balance and perhaps even slightly lacking.**



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

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

	Average 2015/2021	FINAL 2020	FORECAST 2021	FINAL 2021 (provisional)	VARIATION 2021 vs 2020	VARIATION FINAL vs FORECAST 2021	VARIATION 2021 vs average 2015/2020
California	10.266	10.258	10.523	9.650	-5,9%	-8,3%	-6,0%
Italy	5.162	5.166	5.400	6.050	17,1%	12,0%	17,2%
China	5.489	5.800	4.800	4.800	-17,2%	0,0%	-12,6%
Spain	3.107	2.650	3.100	3.185	20,2%	2,7%	2,5%
Turkey	2.100	2.500	2.100	2.200	-12,0%	4,8%	4,8%
Iran	1.204	1.300	1.300	1.300	0,0%	0,0%	8,0%
Portugal	1.460	1.262	1.400	1.596	26,5%	14,0%	9,3%
Brazil	1.417	1.421	1.500	1.350	-5,0%	-10,0%	-4,7%
Chile	1.012	907	1.174	1.174	29,4%	0,0%	16,1%
Tunisia	764	961	1.000	938	-2,4%	-6,2%	22,7%
Algeria	704	1.000	800	820	-18,0%	2,5%	16,5%
Ukraine	689	800	850	800	0,0%	-5,9%	16,2%
Russia	405	515	550	523	1,6%	-4,9%	29,0%
Canada	439	438	450	433	-1,1%	-3,8%	-1,3%
Egypt	351	420	440	440	4,8%	0,0%	25,2%
Greece	420	420	460	420	0,0%	-8,7%	0,0%
Argentina	467	454	595	595	31,1%	0,0%	27,3%
USA excluding California	431	463	453	462	-0,2%	2,0%	7,1%
Others	2.140	1.655	1.924	1.972	19,2%	2,5%	-7,9%
<b>WORLD</b>	<b>38.047</b>	<b>38.390</b>	<b>38.819</b>	<b>38.708</b>	<b>0,8%</b>	<b>-0,3%</b>	<b>1,7%</b>



**In the year 2021, European production  
reached 30% of the world production of  
processing tomatoes**

## EU vs World

### Tomatoes for processing Final 2021)

	Average 2015/2021	2019 FINAL	ESTIMATION FINAL 2020	FORECAST 2021	FINAL (provisonal) 2021	VARIATION 2021 vs 2020	VARIATION 2021 vs average 2015-2021
European Union	10.727	10.343	9.994	10.918	11.783	17,9%	9,8%
Other Countries	27.182	27.040	28.396	27.901	26.925	-5,2%	-0,9%
GENERAL TOTAL	38.047	37.383	38.390	38.819	38.708	0,8%	1,7%
% UE	28,2%	27,7%	26,0%	28,1%	30,4%		



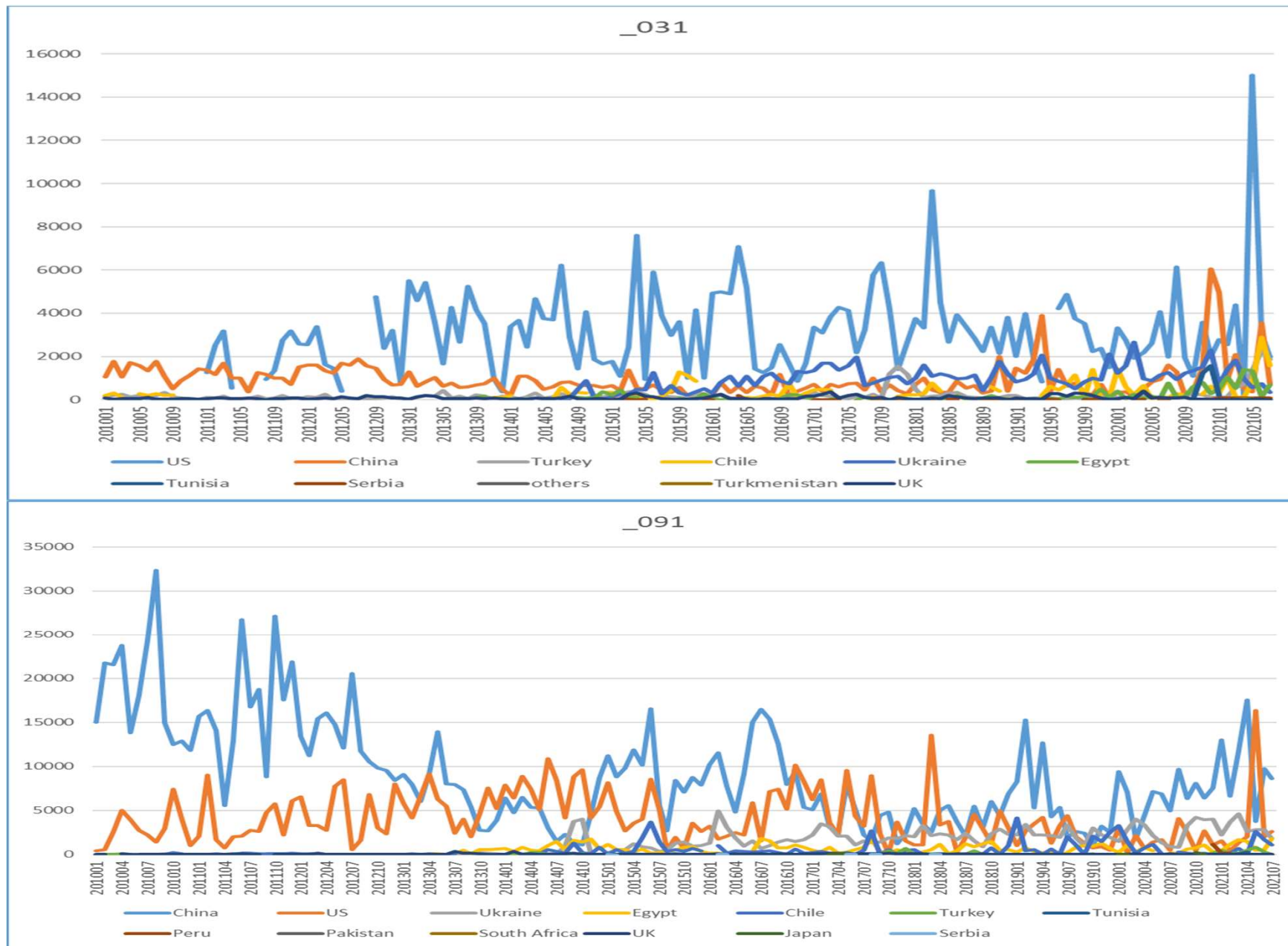
## And now? Uncertainty

**The current situation makes it almost impossible have a short-term forecasts**

# The stocks and the consumption

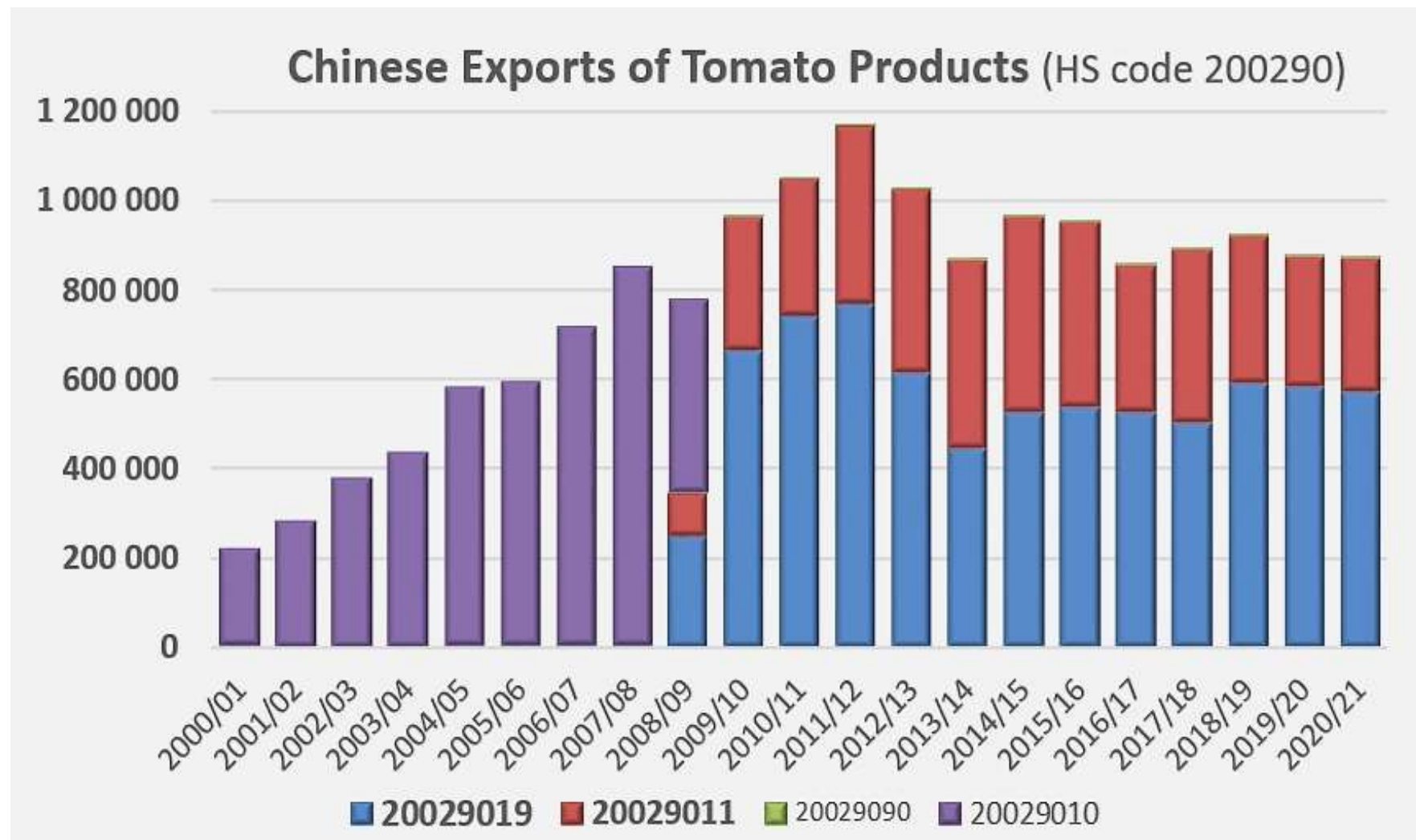
- **The pandemic** has led to an increase in the consumption of tomato products throughout Europe
- **Collapse of available stocks** after the 2020 crop caused an increase in imports in the months immediately preceding the 2021 harvest

## Import UE Tomato Paste (source: European Commission )



## **It's 2021 processing tomato production enough?**

- **Production 2021 would be sufficient to restore European stocks in the presence of a normal consumption trend**
- **We do not yet have any indications as to how consumption will be repositioned after the pandemic**
- **The production of the other major world producers is perhaps not sufficient to guarantee adequate coverage of worldwide stocks**
- **There are also difficulties from the traditional Chinese exporter and the Californian production will be lower than expected**

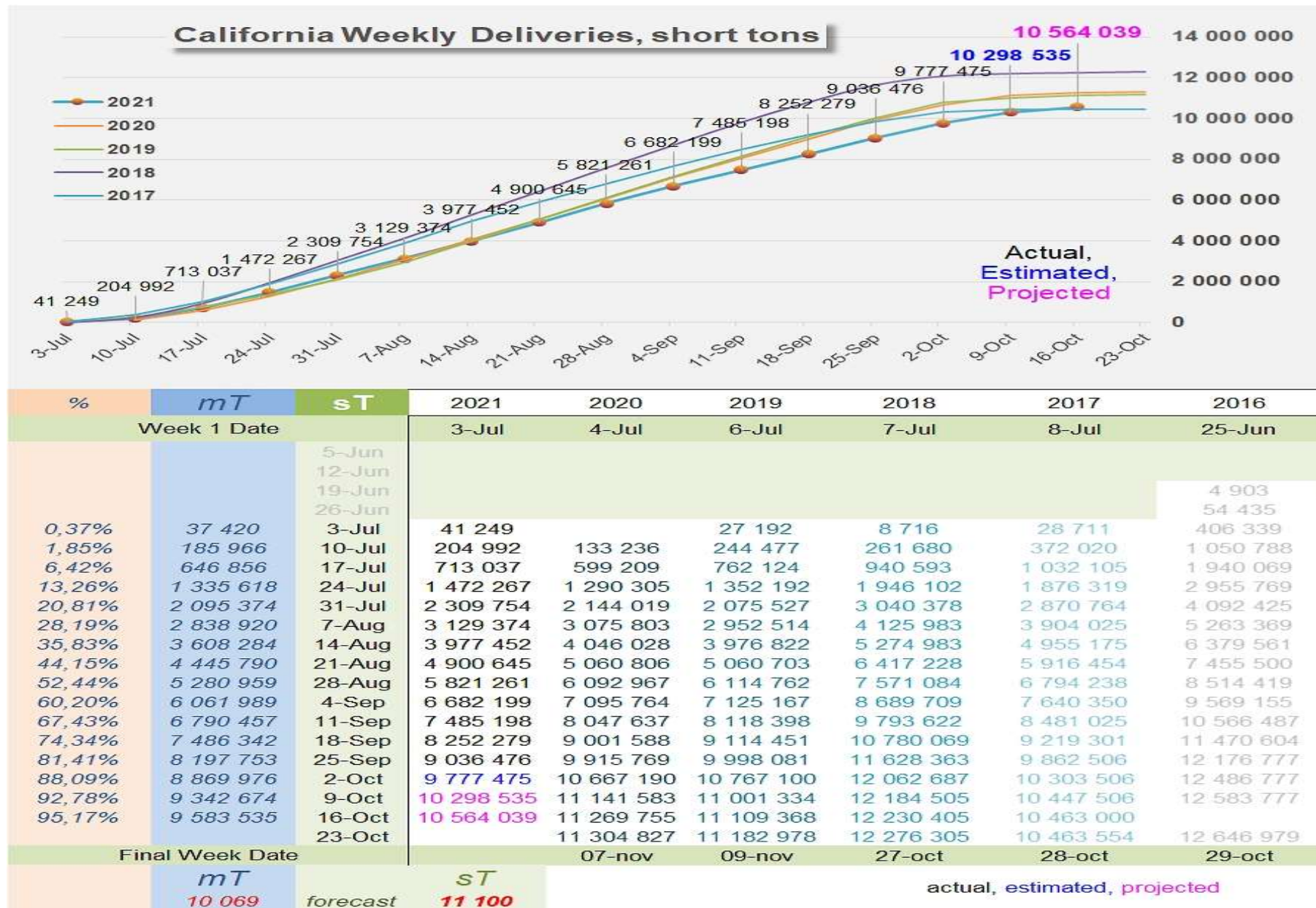


Source: Tomato News

*Base 100 the average cost of sea freight in January 2020, in mid-September 2021 they reached 472 on the China-Northern Europe route and 419 on the China-Mediterranean one, while the general index reached 334*



# The limits of Californian production (source: Tomato News)



## **A new actor on the scene: Climate change**

**The current uncertainty is accentuated by climate change which, making the climate less predictable, and accentuating the climatic phenomena, but not always in a negative sense sometimes for some areas, makes it more difficult than before (and it was not already easy...) a correct planning of agricultural production.**

## **Increase in energy costs**

- **The price of oil has risen by 200 percent since the spring of 2020, while that of gas by 30 percent in the second quarter of this year alone.**
- **The increase in energy costs has consequences on both industrial and agricultural costs.**
- **This entails strong uncertainties on the production choices of agricultural, but also industrial enterprises**



## A positive note.....

**The experience of recent years shows that the **Organization of agricultural production** (Producer Organizations and in some areas also Interbranch Organizations) is a great factor in the stability of European processing tomato production**

## A perfect textbook case of carbon leakage risk



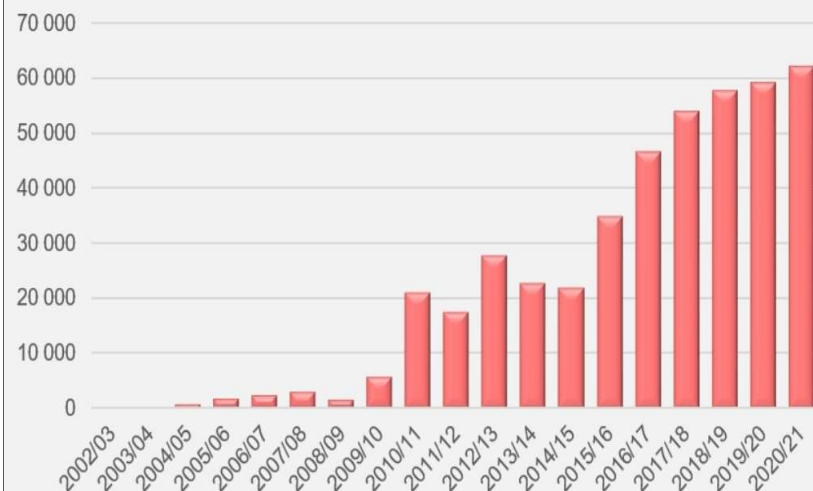
## **The risk of Carbon Leakage is always present**

**The risk of Carbon Leakage is always present, since a large part of the European tomato processing industry is linked to tomato concentration processes, which are heavily energy users.**

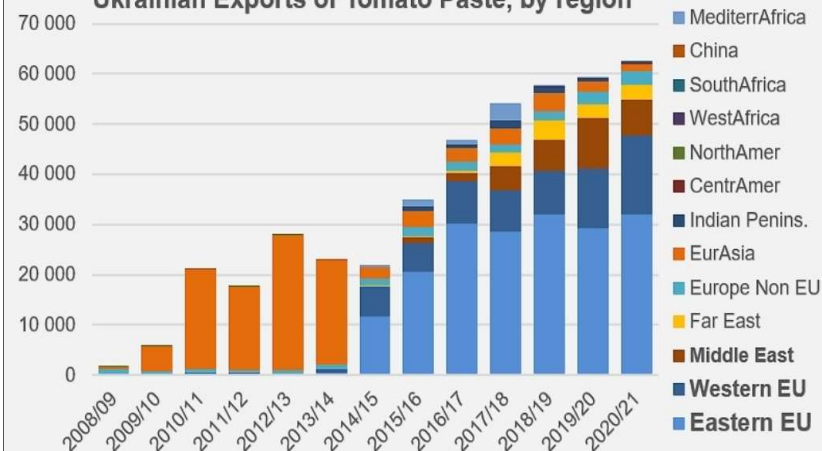
**The proposed amendments to the current ETS must therefore be carefully evaluated in order not to create a devastating impact on the sector.**

## Behind the scenes....

Ukrainian Exports of Tomato Paste (mT)



Ukrainian Exports of Tomato Paste, by region



# Ukrainian Exports to the EU



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**Thanks for your attention**