Spanish contribution

- Balance of the summer campaign
- Expectation of the winter campaign
- Consumers preference and consumption
- Extra-EU suppliers
- ToBRFV virus



EU FRUIT AND VEGETABLES MARKET OBSERVATORY

SUBGROUP TOMATOES

26th October 2023

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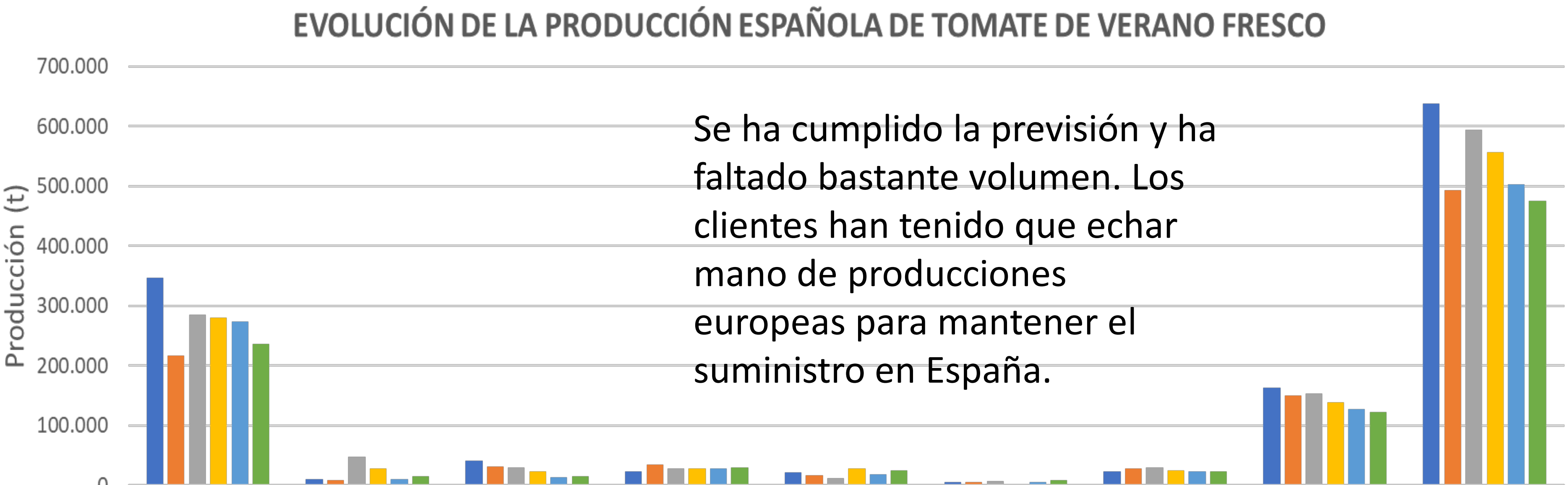
Balance of the summer campaign



Se ha cumplido la previsión y ha faltado bastante volumen. Los clientes han tenido que echar mano de producciones europeas para mantener el suministro en España.

	Andalucía	Extremadura	R. de Murcia	C. Valenciana	C.La Mancha	Navarra	Canarias	Resto CCAA	TOTAL
2018	347.583	10.266	41.274	24.173	21.951	5.677	22.919	163.575	637.418
2019	216.835	9.476	31.581	34.728	16.614	6.054	28.904	149.525	493.717
2020	285.307	48.643	30.462	27.656	12.618	6.418	29.409	152.849	593.362
2021	279.905	28.433	23.702	29.056	29.117	2.735	25.776	138.416	557.140
2022	273.778	10.248	14.510	27.731	18.743	6.208	24.233	127.612	503.063
2023	235.755	15.000	15.450	29.465	24.794	8.185	24.233	122.169	475.051

2018 2019 2020 2021 2022 2023

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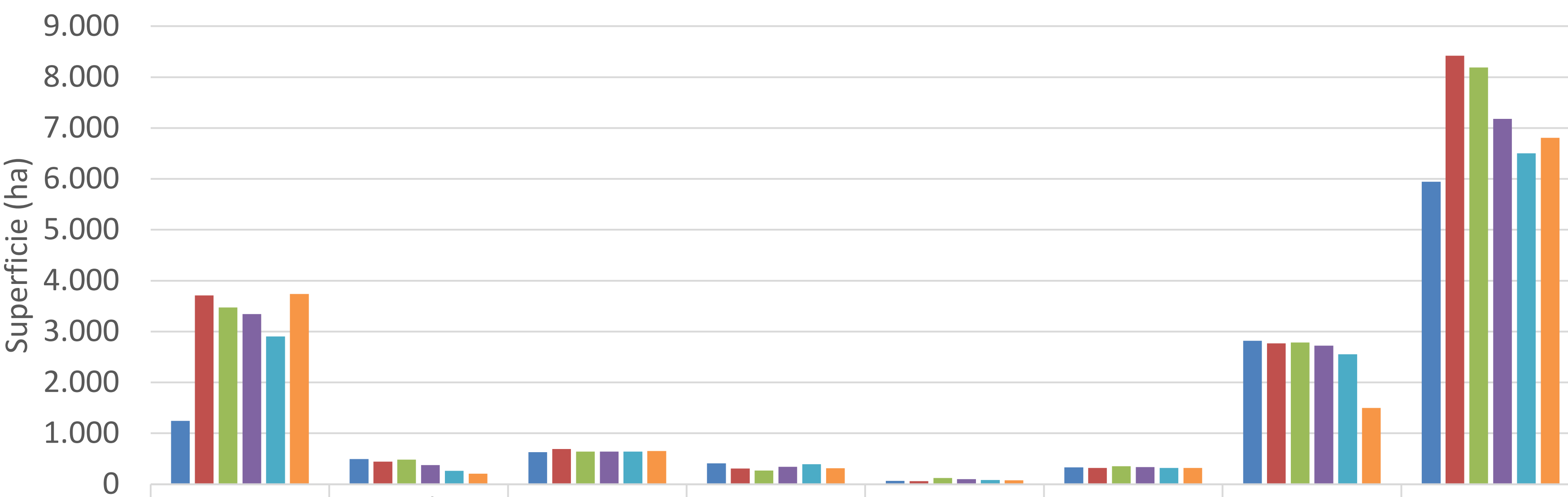
Balance of the summer campaign

EVOLUTION OF THE SURFACE AREA OF FRESH SUMMER TOMATOES



	Andalucía	R. de Murcia	C. Valenciana	C.La Mancha	Navarra	Canarias	Resto CCAA	TOTAL
2018	1.244	492	628	409	67	330	2.818	5.946
2019	3.710	445	689	307	58	316	2.767	8.423
2020	3.474	484	641	267	122	351	2.787	8.188
2021	3.342	376	641	344	100	333	2.724	7.182
2022	2.901	263	641	392	81	316	2.554	6.501
2023	3.740	208	651	315	78	316	1.500	6.808

2018 2019 2020 2021 2022 2023

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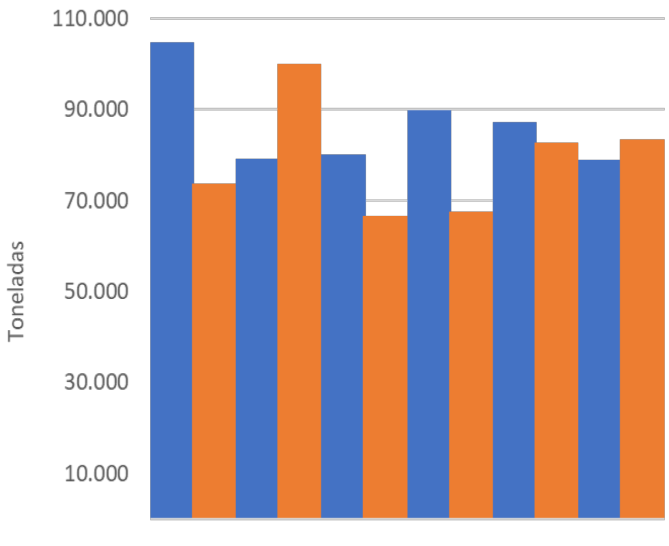
Balance of the summer campaign

Evolución EXPORT/IMPORT tomate de verano en España (jun-sep)



	2.018	2.019	2.020	2.021	2.022	2023*
Exports-tm	104.699	79.284	80.131	89.941	87.280	79.055
Imports-tm	73.614	99.961	66.515	67.628	82.829	83.394

* Septiembre 2023, estimado según tendencia ene-ago

Destino de las exportaciones españolas – ™ y Precios medios

	2.022				2.023					€/Kg
	junio	julio	agosto	TOTAL	junio	julio	agosto	TOTAL	%23/22.	PM jun-ago2023
ALEMANIA	9.429	5.918	13.525	**28.872**	8.692	11.911	6.166	**26.769**	**-7**	2,06
FRANCIA	4.971	3.655	7.043	**15.669**	5.019	5.912	2.352	**13.283**	**-15**	1,35
PAISES BAJOS	1.412	1.304	1.899	**4.615**	919	2.007	1.395	**4.321**	**-6**	2,15
POLONIA	491	406	1.143	**2.040**	214	1.463	2.227	**3.904**	**91**	2,33
REINO UNIDO	980	1.059	1.396	**3.435**	1.073	630	742	**2.445**	**-29**	2,39
OTROS	5.339	3.412	6.674	**15.425**	4.021	5.117	3.184	**12.322**	**-20**	1,99
TOTAL	**22.622**	**15.754**	**31.680**	**70.056**	**19.938**	**27.040**	**16.066**	**63.044**	**-10**	**1,93**

Origen de las importaciones españolas – ™ y Precios medios

	2.022				2.023					€/Kg
	junio	julio	agosto	TOTAL	junio	julio	agosto	TOTAL	%23/22.	PM jun-ago2023
BÉLGICA	2.070	3.112	3.576	**8.758**	1.482	2.624	2.358	**6.464**	**-26**	0,86
MARRUECOS	5.960	3.546	1.796	**11.302**	770	1.160	662	**2.592**	**-77**	1,58
PAISES BAJOS	4.665	5.348	6.990	**17.003**	4.038	6.150	6.255	**16.443**	**-3**	0,96
POLONIA	558	530	741	**1.829**	108	43	707	**858**	**-53**	1,01
PORTUGAL	5.328	6.685	12.487	**24.500**	7.198	9.401	22.145	**38.744**	**58**	0,79
OTROS	164	223	393	**780**	121	149	247	**517**	**-34**	1,30
Total	**18.745**	**19.444**	**25.983**	**64.172**	**13.717**	**19.527**	**32.374**	**65.618**	**2**	**0,88**

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Balance of the summer campaign

Tomate Redondo Liso. Precio Salida Centro de Acondicionamiento (€/100 kg)

		ESPAÑA							
	Semana	2019	2020	2021	2022	2023	Media (2018/19-2021/22)	Actual vs Anterior	Actual vs Media 5
Junio	23	78,19	59,76	71,89	107,45	83,40	79,32	-22,4%	5,1%
	24	70,37	64,42	64,33	129,97	69,10	82,27	-46,8%	-16,0%
	25	72,71	63,35	59,92	90,81	66,27	71,70	-27,0%	-7,6%
	26	83,62	73,81	73,54	79,49	61,99	77,62	-22,0%	-20,1%
Julio	27	94,00	60,62	91,95	104,77	65,50	87,84	-37,5%	-25,4%
	28	74,34	56,26	78,81	110,51	64,07	79,98	-42,0%	-19,9%
	29	70,60	47,10	74,53	89,00	66,73	70,31	-25,0%	-5,1%
	30	103,50	51,77	73,53	96,57	74,53	81,34	-22,8%	-8,4%
	31	87,18	55,73	67,10	92,78	92,14	75,70	-0,7%	21,7%
Agosto	32	118,88	61,15	63,12	96,58	105,05	84,93	8,8%	23,7%
	33	73,97	57,61	79,14	69,20	107,20	69,98	54,9%	53,2%
	34	68,16	52,29	61,29	65,86	85,74	66,67	30,2%	28,6%
	35	73,72	55,92	51,03	81,28	91,27	65,49	12,3%	39,4%
Septiembre	36	70,56	44,16	58,29	87,04	86,30	65,01	-0,9%	32,7%
	37	70,69	59,75	79,26	130,35	103,79	85,01	-20,4%	22,1%
	38	74,03	103,02	74,32	134,68	106,90	96,51	-20,6%	10,8%
	39	73,91	89,78	75,00	134,70	115,21	93,35	-14,5%	23,4%
	MEDIA campaña	**79,91**	**62,15**	**70,41**	**100,06**	**85,01**	**78,41**	**-15,0%**	**8,4%**

Fuente MAPA

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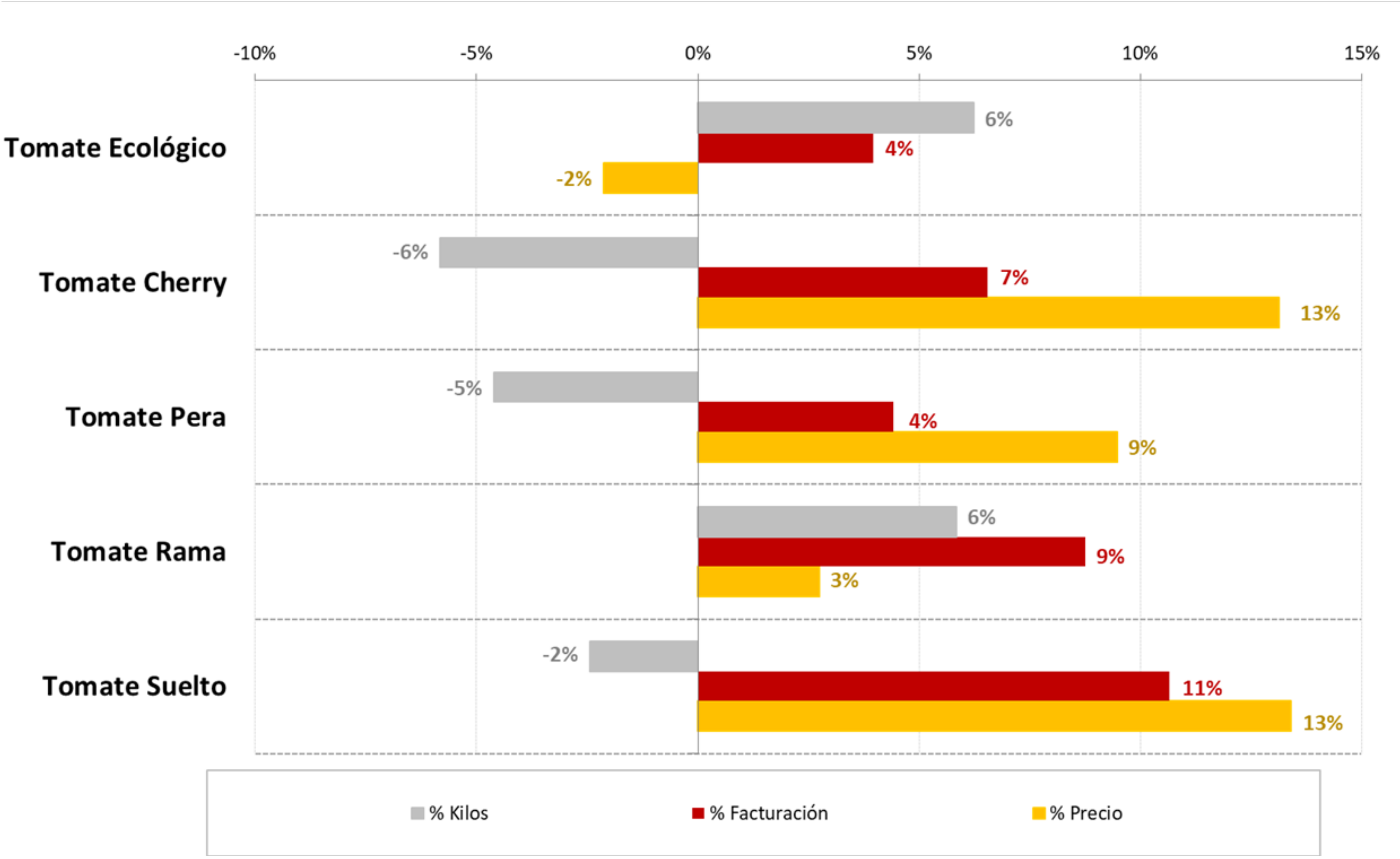
Expectation of the winter campaign

WINTER PRODUCTION	2019/20	2020/21	2021/22	2022/23	forec 23/24
Production fresh tomatoes (tonnes)	**1.610.654**	**1.402.296**	**1.245.558**	**1.204.896**	**1.216.945**
% organic	8	8	9	11	12
% non-organic	92	92	91	90	89
% greenhouse	100	100	100	100	100
% open field	0	0	0	0	0
%Round tomatoes	29	34	33	29	28
%Vine tomatoes	25	23	23	25	24
%Other tomatoes (cherry, mini-type…)	46	43	44	46	48
% destined to national market	56	57	54	53	53
% destined to exports EU	43	42	45	45	45
% destined to exports non-EU	1	1	1	2	2
Surface fresh tomatoes (ha)	**16.559**	**14.417**	**13.569**	**13.989**	**14.129**
% organic	10	10	11	12	13
% non-organic	90	90	89	88	87
% greenhouse	100	100	100	100	100
% open field	0	0	0	0	0
%Round tomatoes	30	34	30	29	29
%Vine tomatoes	26	22	24	26	25
%Other tomatoes (cherry, mini-type…)	44	44	46	45	46
% destined to national market	58	59	56	56	56
% destined to exports EU	41	40	43	43	43
% destined to exports non-EU	1	1	1	1	1

Expectation of the winter campaign

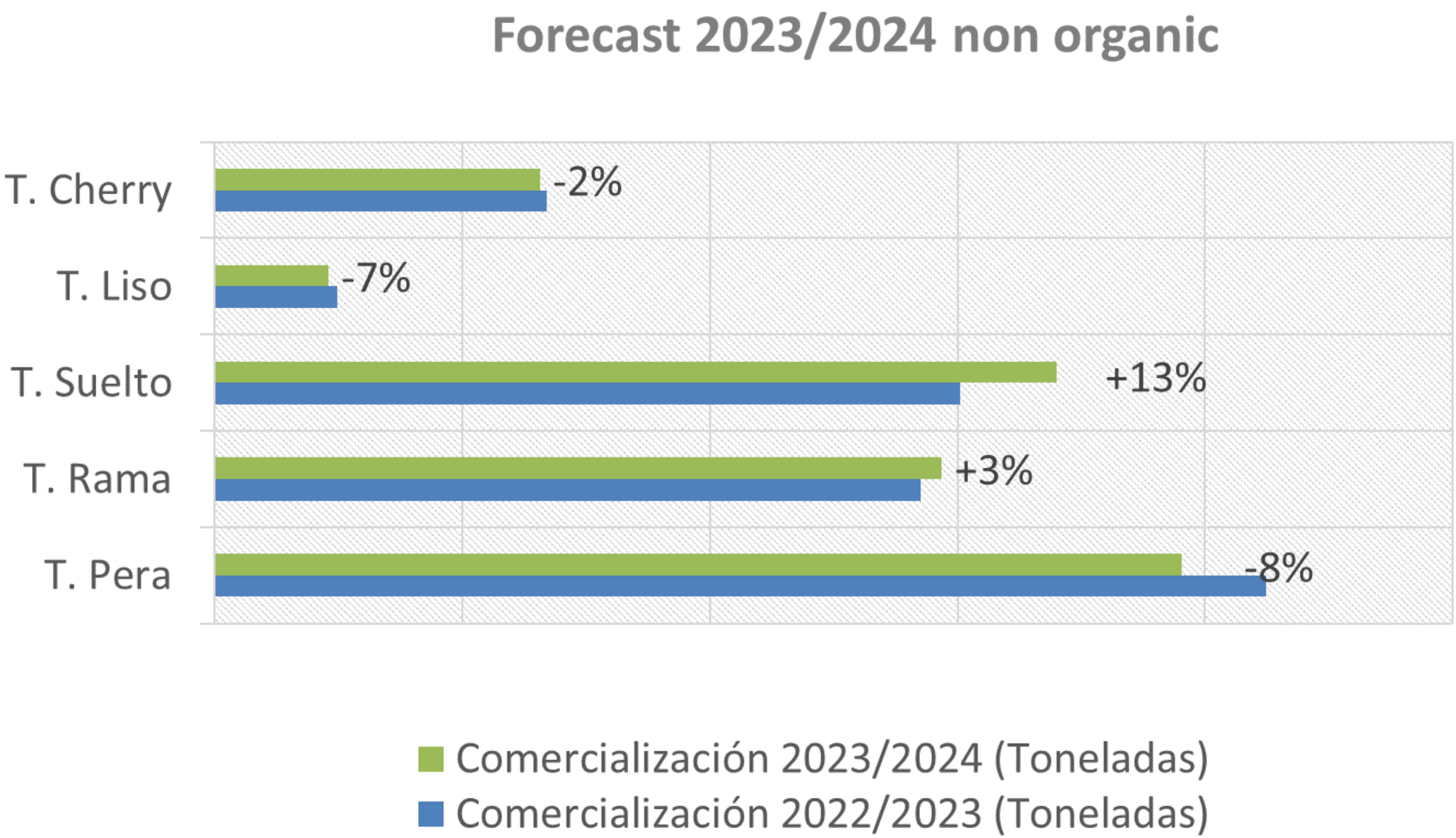
Balance of the winter campaign 2022-23

VARIATION: 0% volume; +9% Price; +2,5% cost



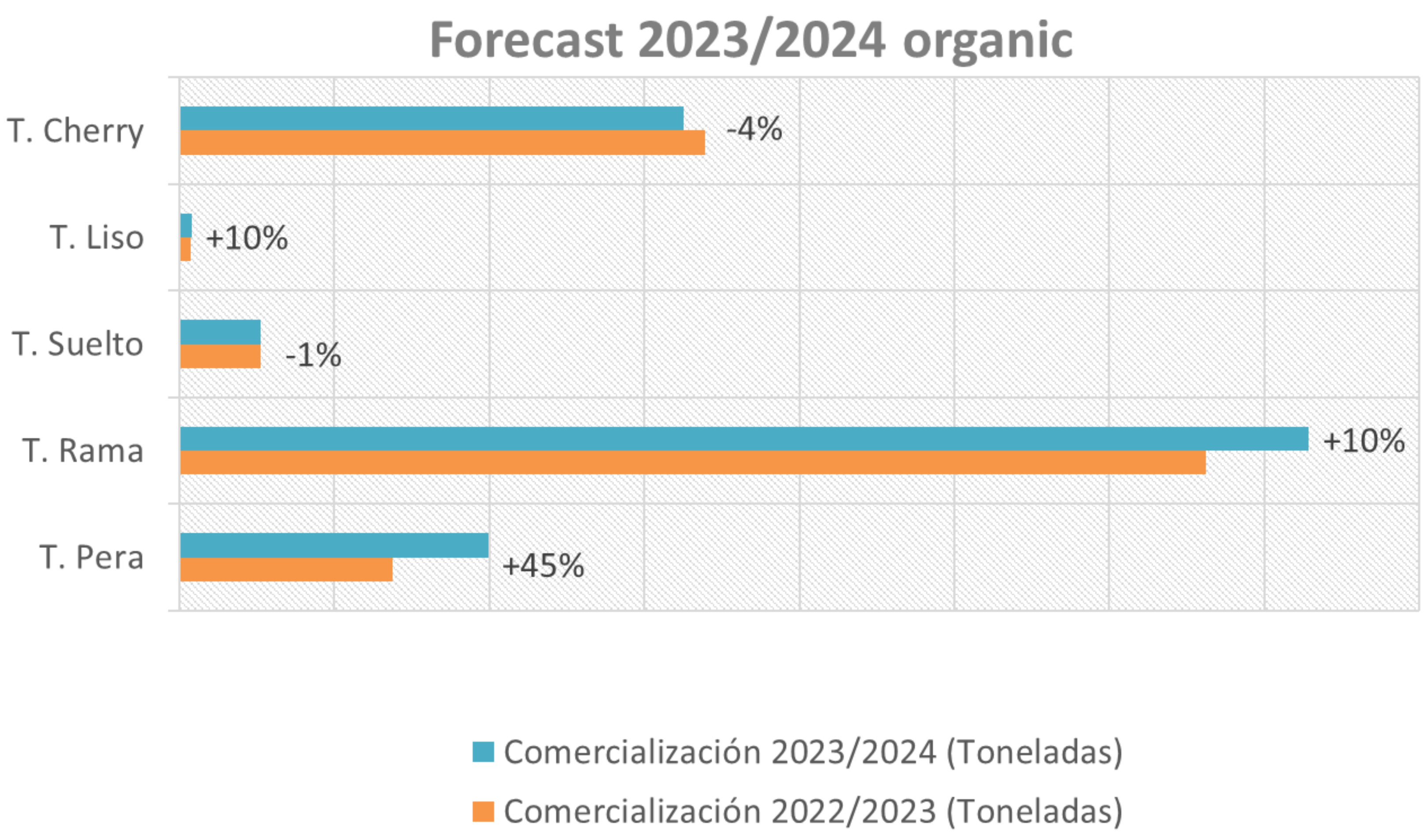
COEXPHAL
unidosexportandofuturo

Expectation of the winter campaign



COEXPHAL
unidos exportando futuro

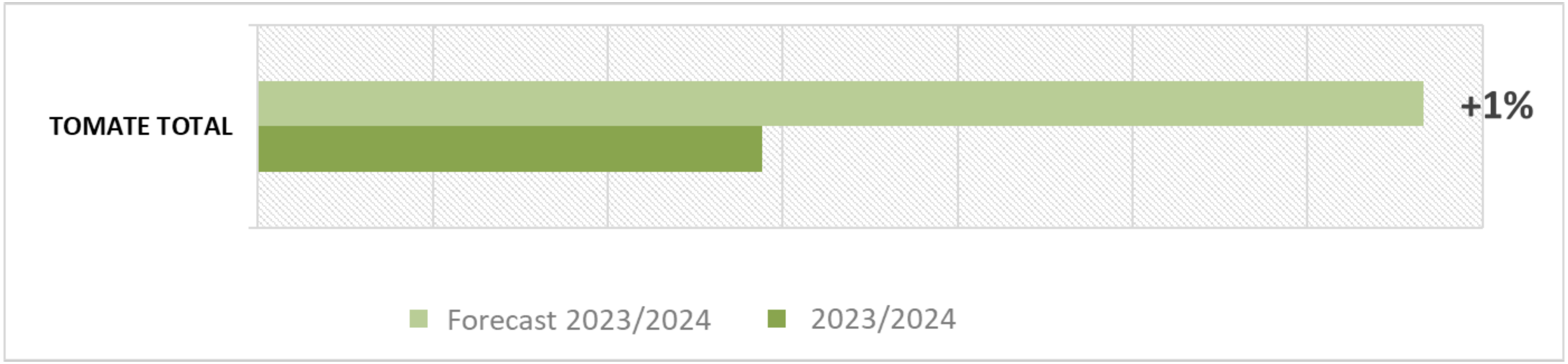
Expectation of the winter campaign



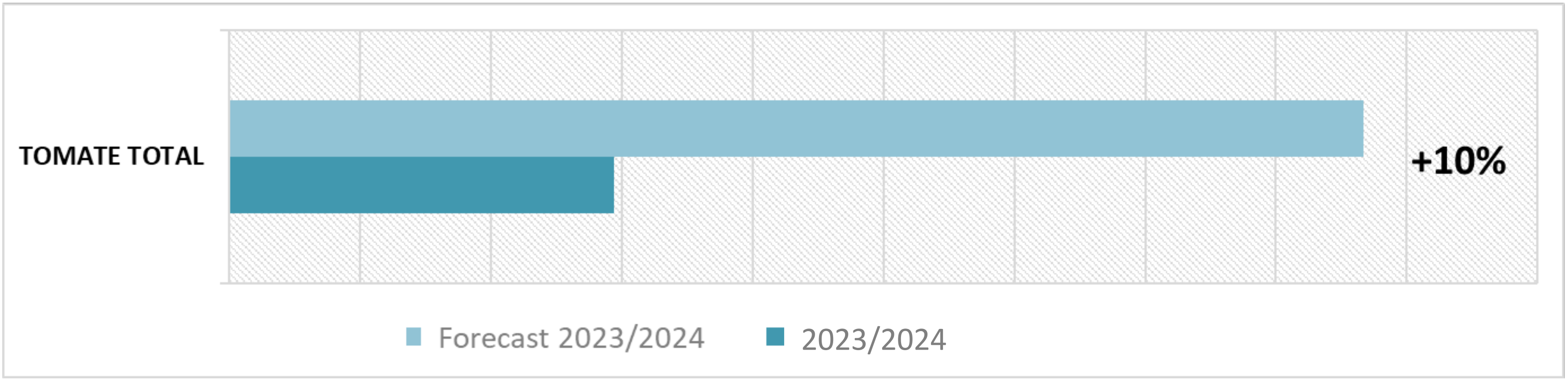
Expectation of the winter campaign

1.216.945 tons

NON ORGANIC



ORGANIC



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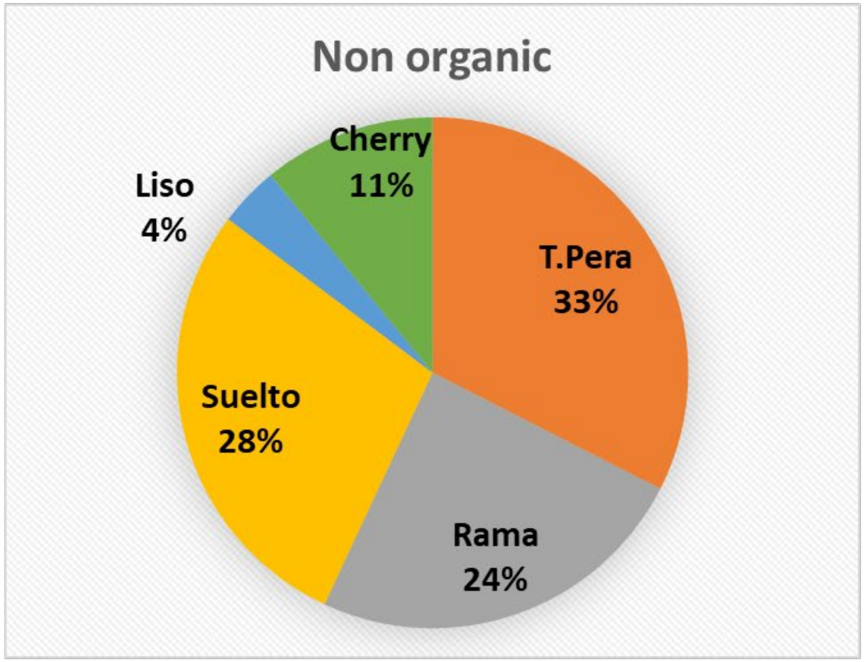
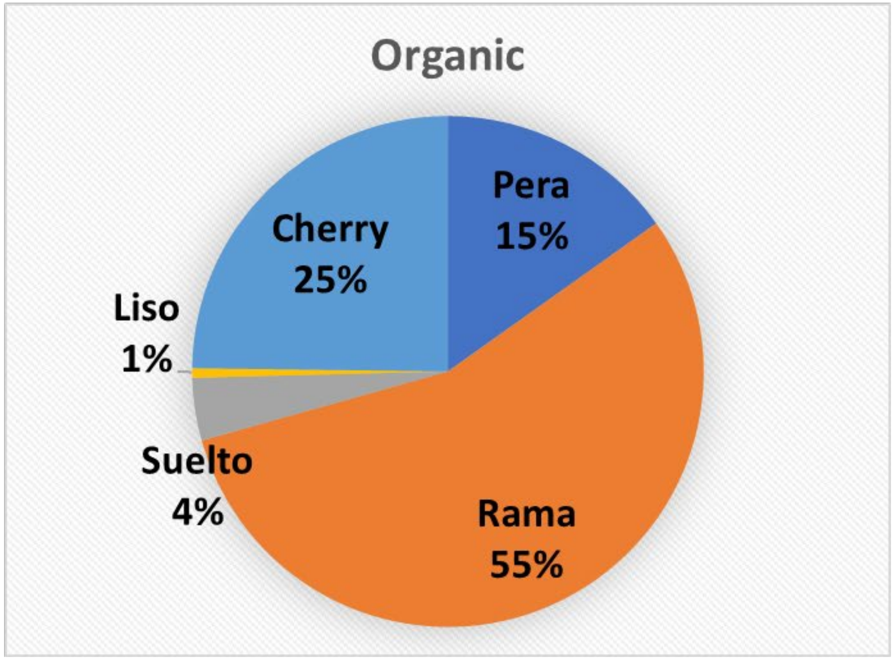
Expectation of the winter campaign

Forecast tomato 2023/2024





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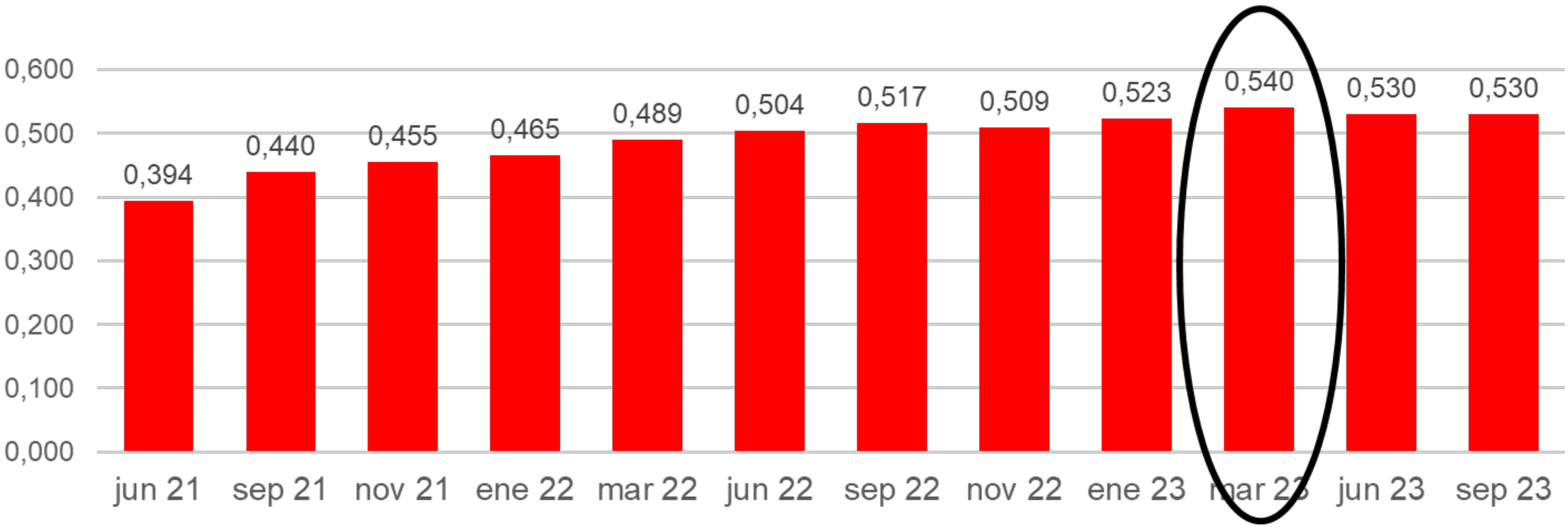
Expectation of the winter campaign

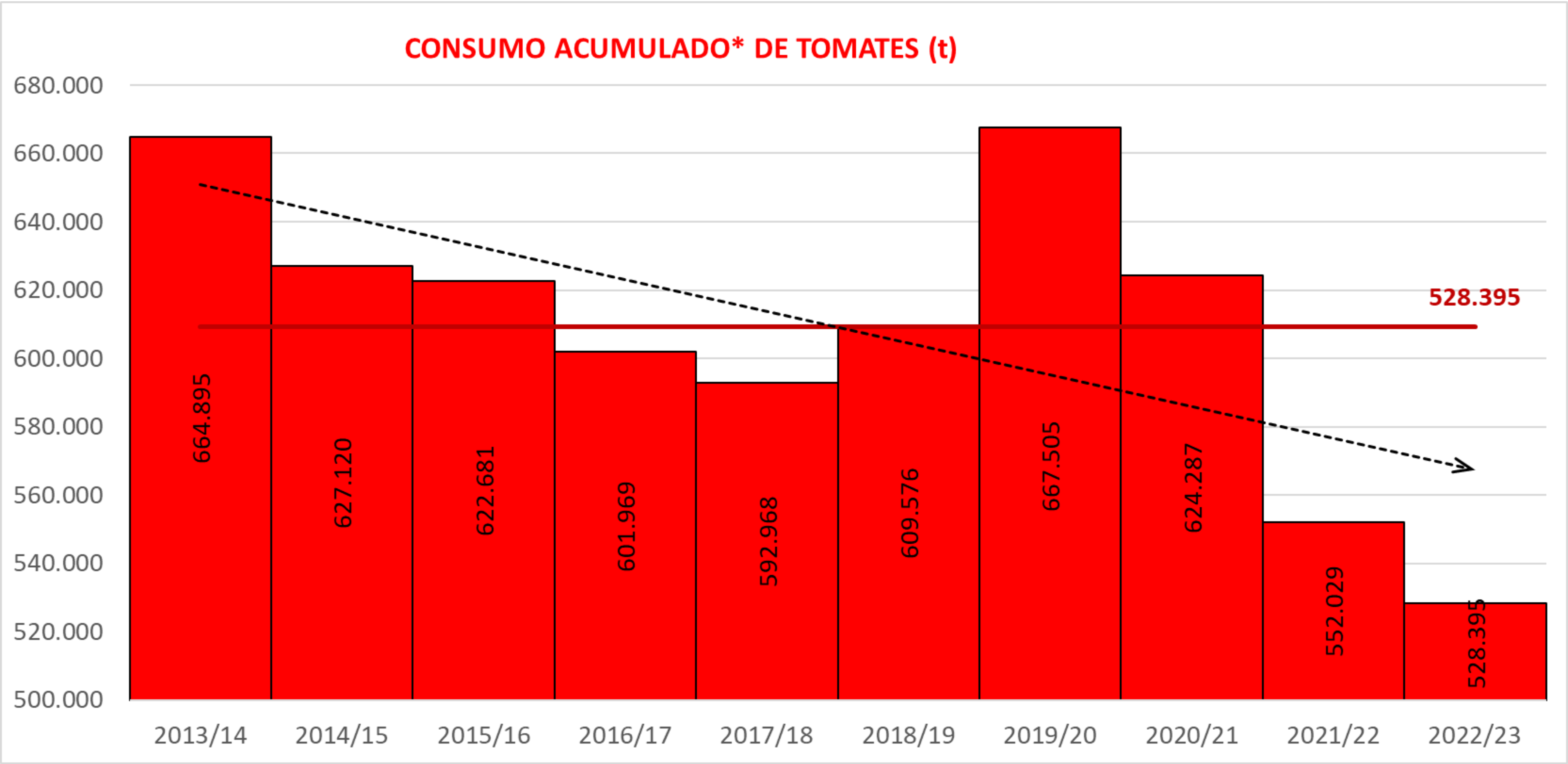
EVOLUTION OF THE COST OF PRODUCTION (€/KG): ACUMULATIVE FROM JUN 2021 – SEPT 2023

+34%



COEXPHAL unidosexportandofuturo

Evolution of consumers preference and consumption



* Último dato disponible, agosto 2023

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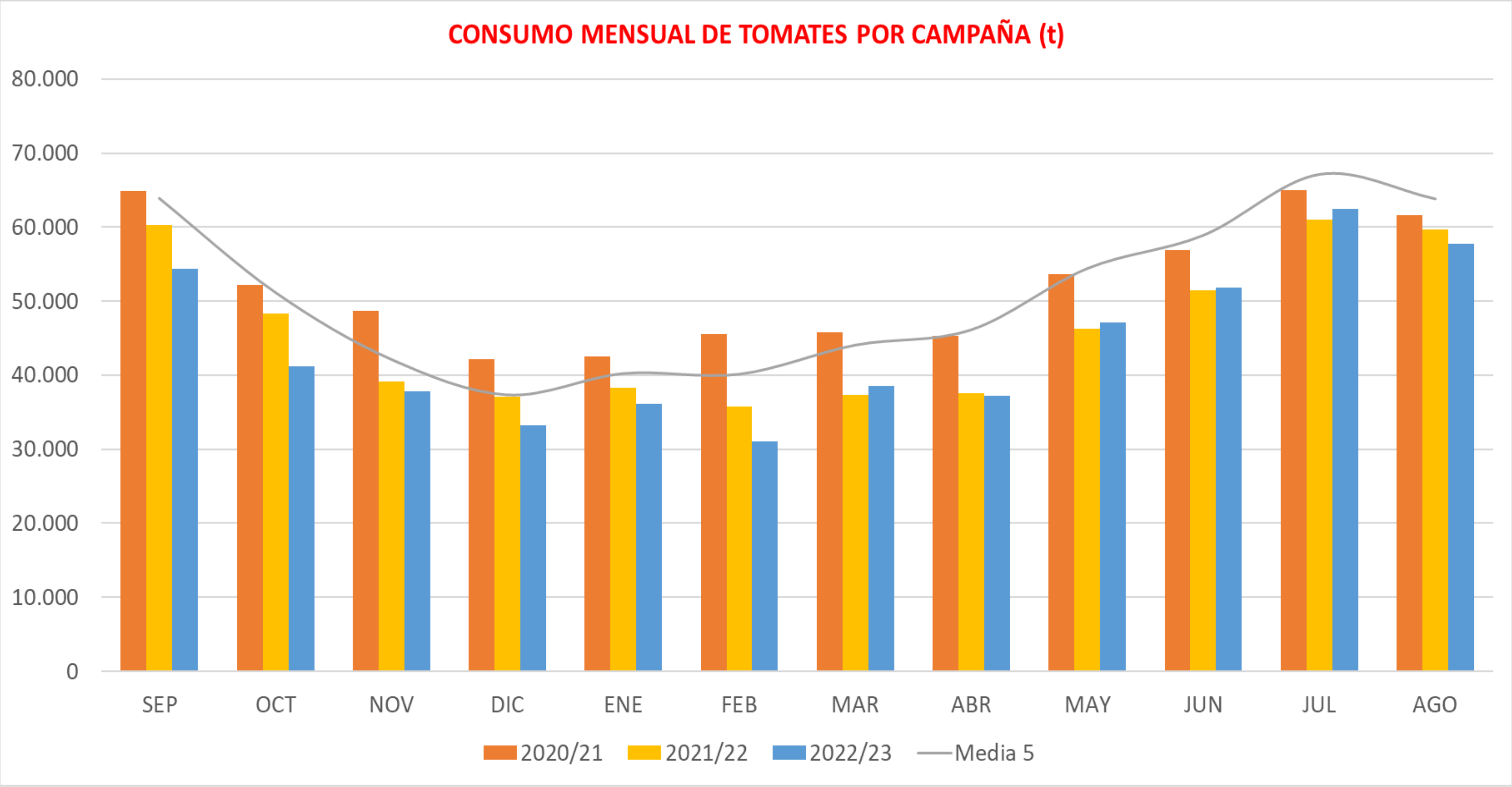
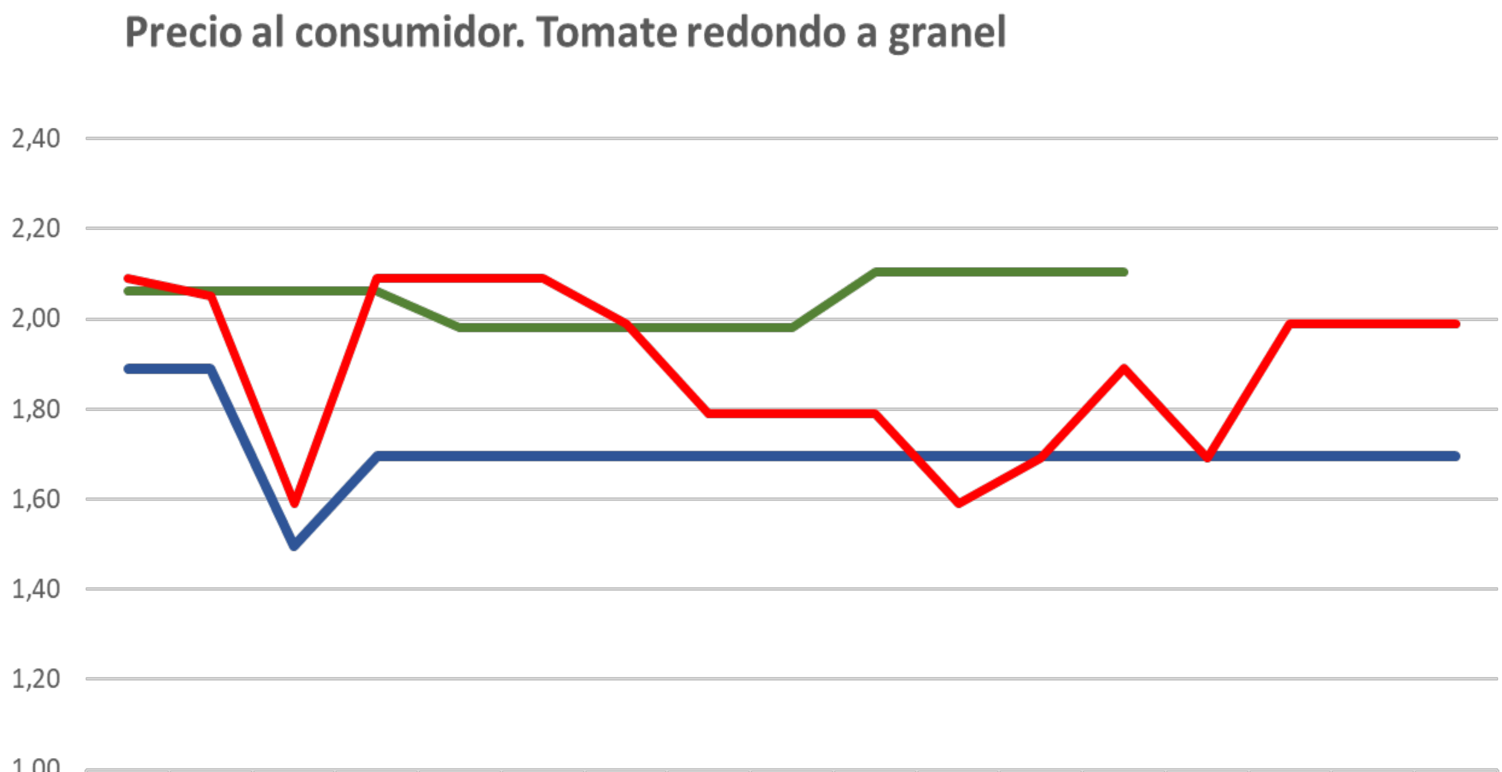
Evolution of consumers preference and consumption



Evolution of consumers preference and consumption



Semanas	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39
Precio medio consumo en hogares	2,06	2,06	2,06	2,06	1,98	1,98	1,98	1,98	1,98	2,10	2,10	2,10	2,10				
Precio distribución organizada 1	1,9	1,9	1,5	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7	1,7
Precio distribución organizada 2	2,09	2,05	1,59	2,09	2,09	2,09	1,99	1,79	1,79	1,79	1,59	1,69	1,89	1,69	1,99	1,99	1,99

Precio medio consumo en hogares   Precio distribución organizada 1   Precio distribución organizada 2

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Evolution of consumers preference and consumption

	2023				2023		
Consumo per cápita (kg/pers)	**junio**	**julio**	**agosto**	**Precio medio (€/kg)**	**junio**	**julio**	**agosto**
ALTA Y MEDIA ALTA	1,33	1,49	1,42	ALTA Y MEDIA ALTA	2,12	1,98	2,10
MEDIA	1,08	1,29	1,23	MEDIA	2,12	1,99	2,15
MEDIA BAJA	1,09	1,35	1,18	MEDIA BAJA	2,05	2,01	2,10
BAJA	1,02	1,28	1,18	BAJA	1,95	1,94	2,06

* Último dato disponible, agosto 2023

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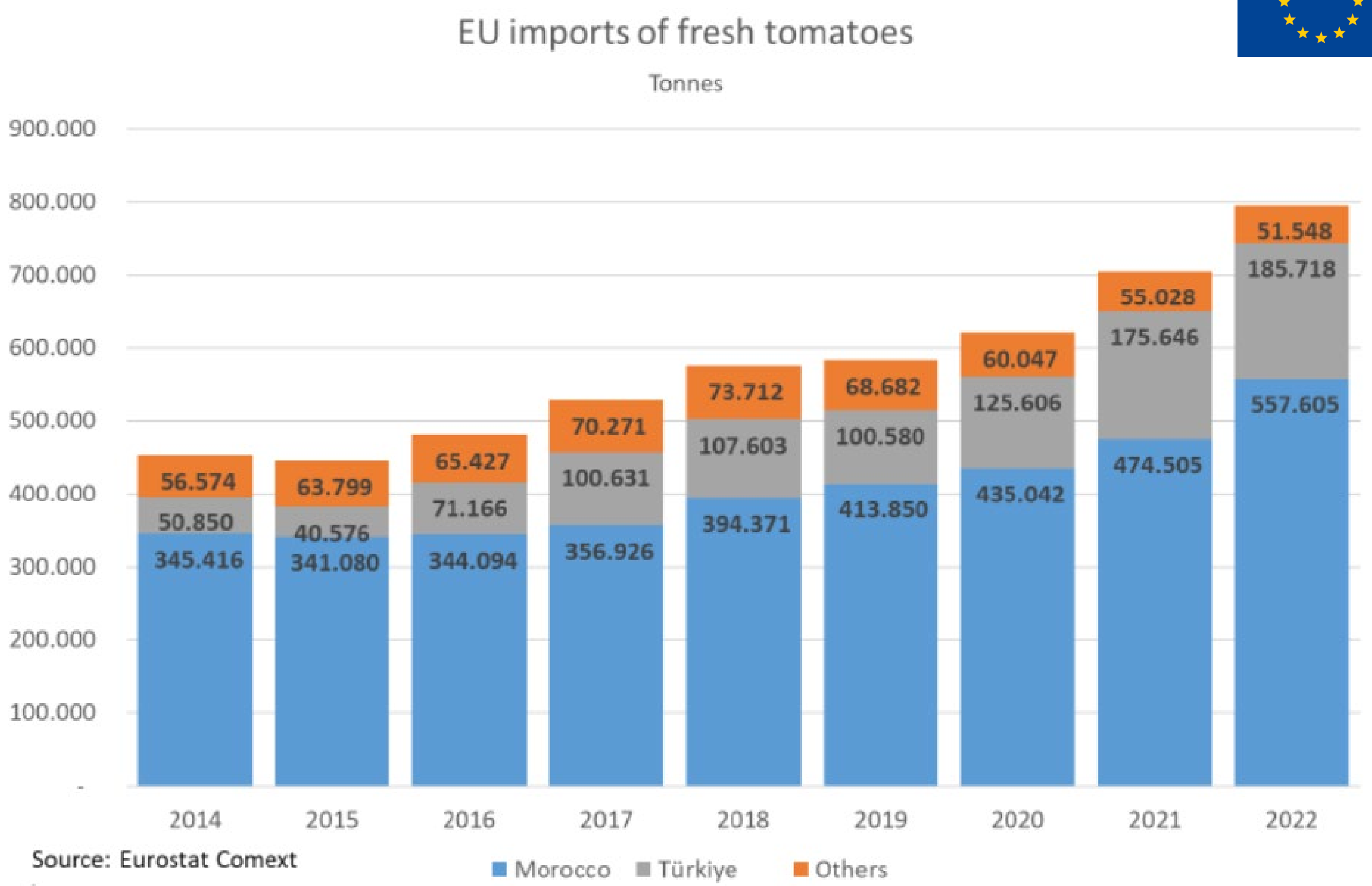
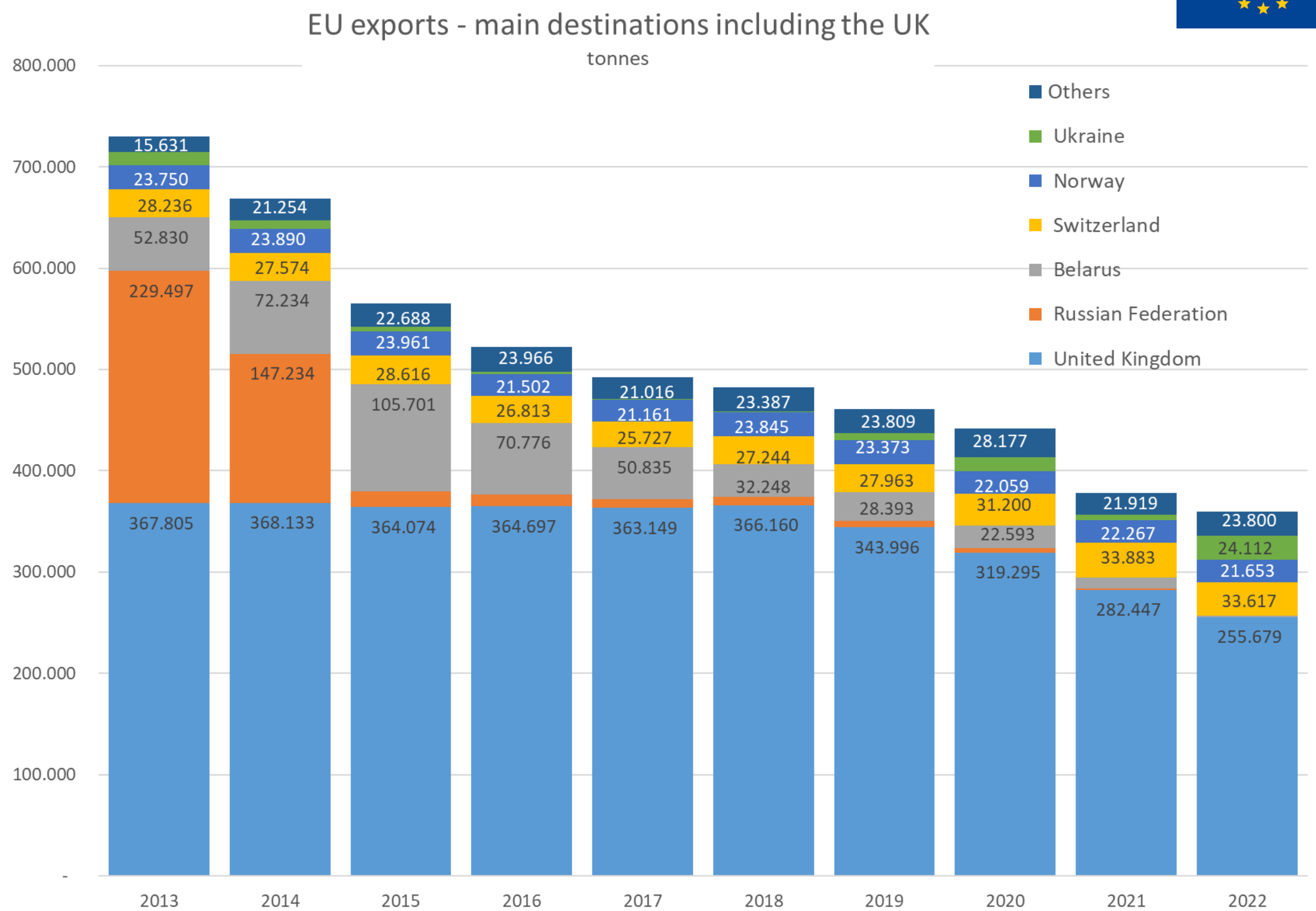
Competitiveness of the other extra-EU suppliers



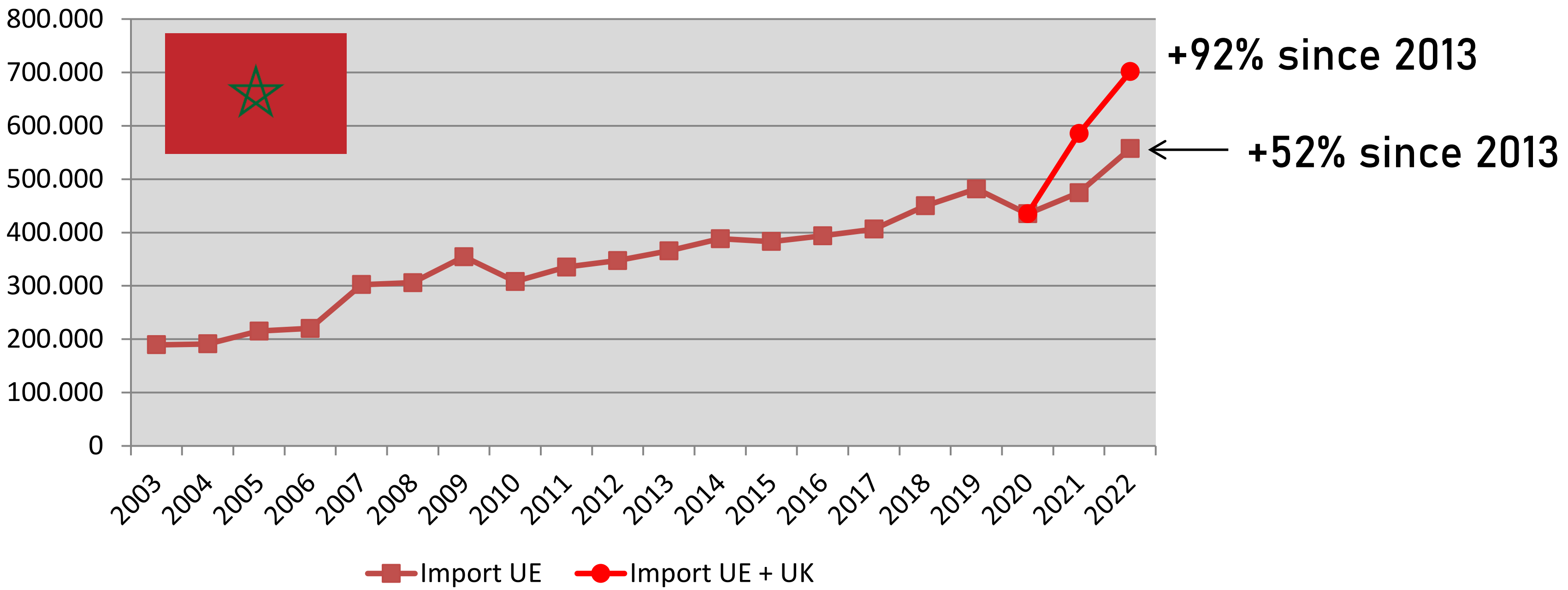
Source: Eurostat Comext

Competitiveness of the other extra-EU suppliers



Competitiveness of the other extra-EU suppliers

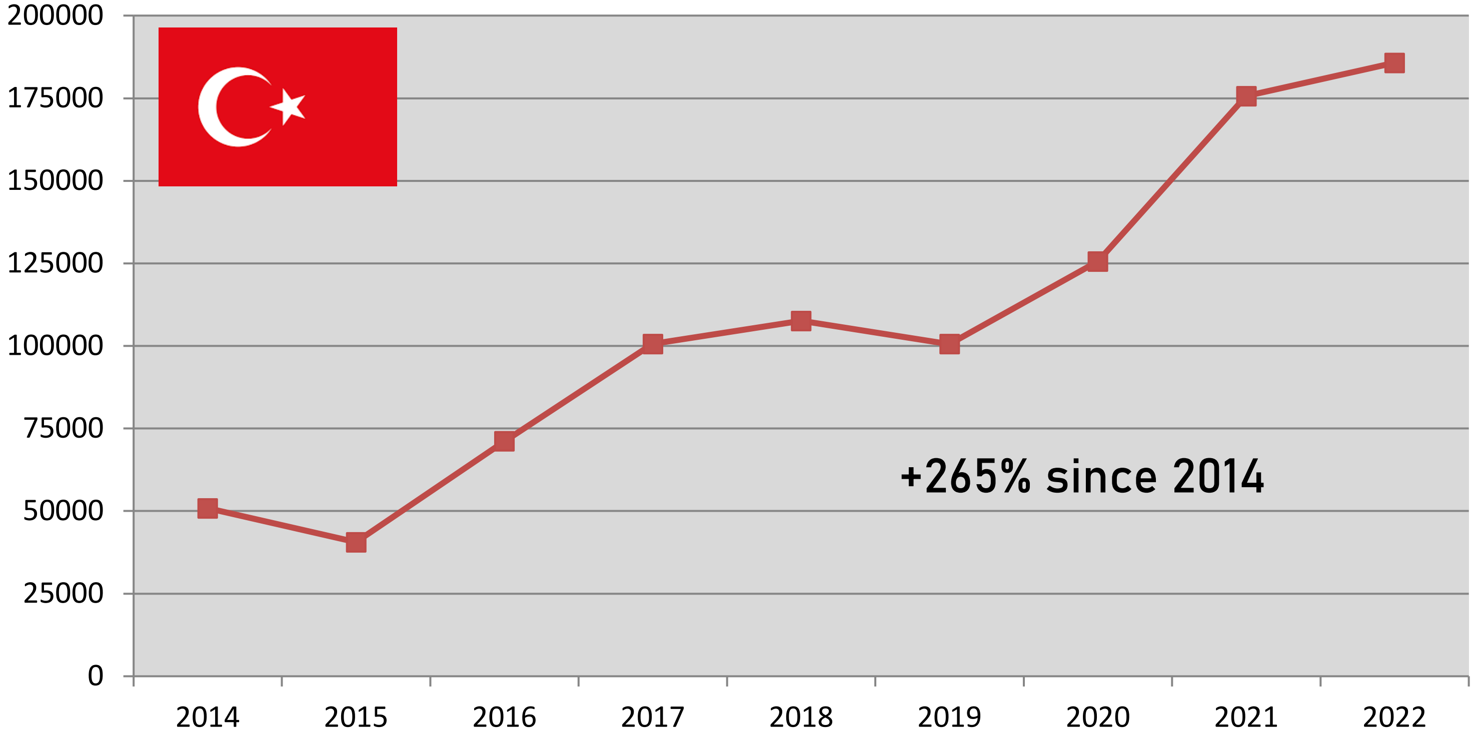
Imports from Morocco



- **Exportation record** from Morocco in 2022/23: 716,700 tons. In 5 years, increased by more than 25%, one of the fastest growth rates.
- **Increase of production costs** during last campaign: 30% (inputs, fertilizers…)
- Important impact of **diseases and pests**. ToBRFV is present and affecting
- Doubts for the **next campaign**: pests and water availability

Competitiveness of the other extra-EU suppliers

Imports from Turkey



- Effects of Turkey bans tomato exports March - mid-April 2023?

Competitiveness of the other extra-EU suppliers

→ **Increase of production cost** in Spain +51% 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)

Update on the Tomato brown rugose fruit virus (ToBRFV)

→ The virus is **present but still controlled**
→ Situation stabilised in winter production and no special problems for this next campaign

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

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

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

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

Thank you for your attention

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