



TomatoEurope

PROCESSORS ASSOCIATION

Monday, October 26, 2023
Fruit & Vegetable Market Observatory
Sub-group Tomatoes

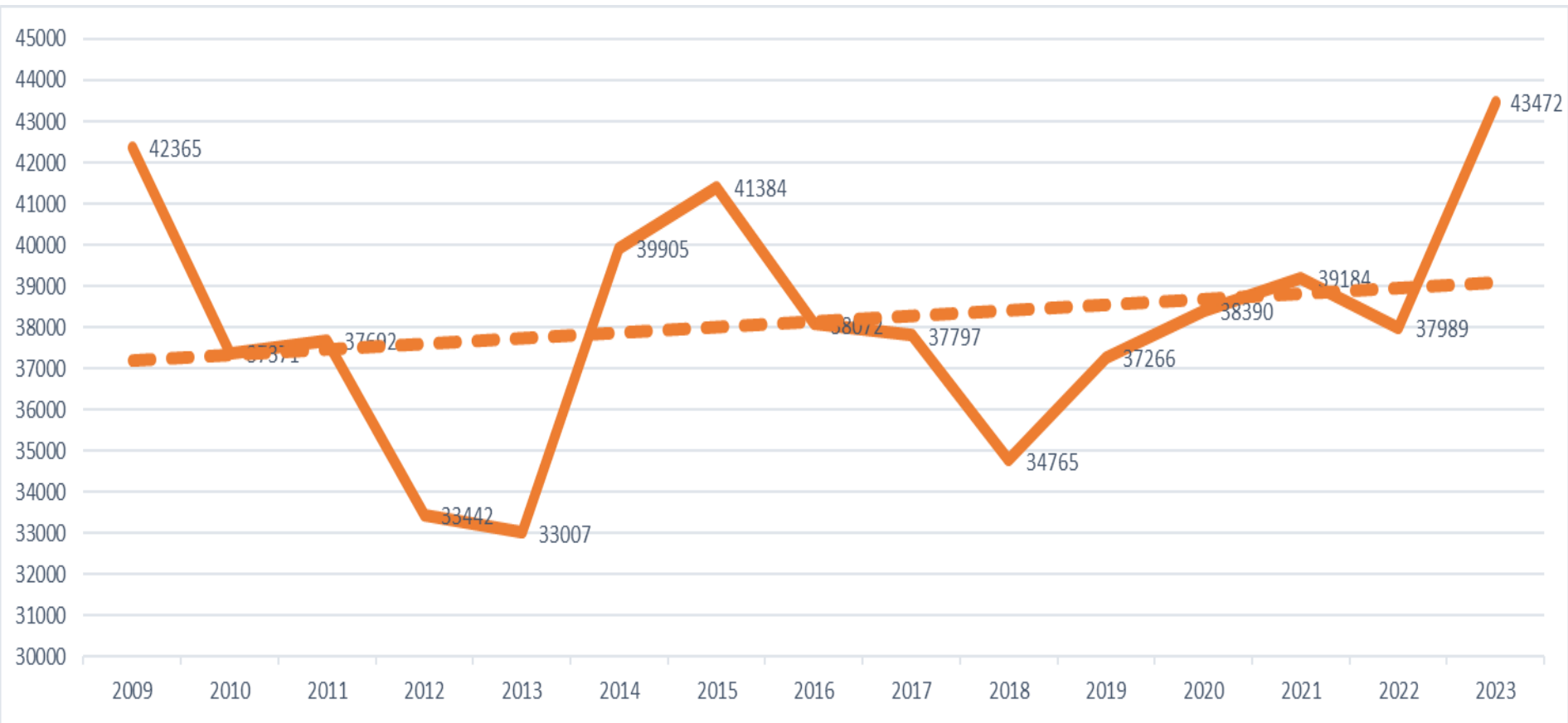
Crop 2023
Tomatoes for processing

Production estimates and trends in the
European supply chain

Major producing countries and total world production (forecast final 2023 x.000 tons)

| | Average 2016/2022 | FINAL 2020 | FINAL 2021 | FINAL 2022 | FORECAST 2023 | VARIATION 2023 vs 2022 | VARIATION 2023 vs average 2016/2022 |
|--------------------------|----------------------|---------------|---------------|---------------|------------------|---------------------------|---|
| California | 10.054 | 10.258 | 9.761 | 9.514 | 11.160 | 14,7% | 11,0% |
| China | 5.546 | 5.800 | 4.800 | 6.200 | 7.300 | 15,1% | 31,6% |
| Italy | 5.297 | 5.166 | 6.059 | 5.476 | 5.300 | -3,3% | 0,1% |
| Turkey | 2.168 | 2.500 | 2.200 | 2.350 | 2.700 | 13,0% | 24,5% |
| Spain | 2.966 | 2.650 | 3.185 | 2.125 | 2.600 | 18,3% | -12,3% |
| Iran | 1.240 | 1.300 | 1.300 | 1.300 | 2.300 | 43,5% | 85,5% |
| Brazil | 1.447 | 1.421 | 1.525 | 1.632 | 1.650 | 1,1% | 14,0% |
| Portugal | 1.470 | 1.262 | 1.596 | 1.414 | 1.500 | 5,7% | 2,0% |
| Algeria | 821 | 1.000 | 1.000 | 1.200 | 1.350 | 11,1% | 64,5% |
| Chile | 1.011 | 907 | 1.174 | 971 | 1.150 | 15,6% | 13,7% |
| Russia | 449 | 515 | 523 | 638 | 670 | 4,8% | 49,2% |
| Tunisia | 762 | 961 | 940 | 689 | 650 | -6,0% | -14,7% |
| Egypt | 374 | 420 | 440 | 456 | 600 | 24,0% | 60,6% |
| Argentina | 492 | 454 | 596 | 626 | 586 | -6,8% | 19,2% |
| Ukraine | 611 | 800 | 800 | 120 | 550 | 78,2% | -10,0% |
| Canada | 447 | 438 | 399 | 548 | 530 | -3,4% | 18,5% |
| USA excluding California | 435 | 463 | 462 | 450 | 450 | 0,0% | 3,4% |
| Greece | 404 | 420 | 420 | 340 | 390 | 12,8% | -3,4% |
| Others | 2.100 | 1.655 | 2.004 | 1.940 | 2.036 | 4,7% | -3,0% |
| WORLD | 38.107 | 38.390 | 39.184 | 37.989 | 43.472 | 12,6% | 14,1% |

Historical World production of processing tomatoes (x.000 ton)



Production 2023

- The very strong recovery of Chinese production is confirmed and the same for Turkey and especially for Iran
- Californian production returns to "historical" productions Ukrainian production is expected to recover partially
- European production remains at its historical levels
- The result is an increase in world production expected to exceed 12% and resume the upward trend interrupted in recent years, signal of a slight but constant increase in consumption worldwide

Consequently, in the 2023, the percentage of European production, compared to world production, should confirm, and indeed it increases, the decline in 2022

EU Processing tomatoes

Crop 2023 Forecast

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

| | Average 2016/2022 | FINAL 2020 | FINAL 2021 | FINAL 2022 | FINAL 2023 | VARIATION 2023 vs 2022 | VARIATION 2023 vs average 2016/2022 |
|----------------------|----------------------|---------------|---------------|---------------|---------------|---------------------------|--|
| Italy | 5.297 | 5.166 | 6.059 | 5.476 | 5.300 | -3,2% | 0,1% |
| Spain | 2.168 | 2.500 | 2.200 | 2.350 | 2.600 | 10,6% | 19,9% |
| Portugal | 1.447 | 1.421 | 1.525 | 1.632 | 1.500 | -8,1% | 3,7% |
| Greece | 404 | 420 | 420 | 340 | 390 | 14,7% | -3,4% |
| France | 169 | 136 | 164 | 142 | 160 | 12,7% | -5,5% |
| TOMATO EUROPE | 10.062 | 9.643 | 10.368 | 9.940 | 9.950 | 0,1% | -1,1% |
| Malta | 8 | 8 | 7 | 5 | 8 | 60,0% | 0,4% |
| Bulgaria | 44 | 40 | 40 | 40 | 40 | 0,0% | -9,7% |
| Czech Republic | 25 | 25 | 25 | 25 | 25 | 0,0% | 0,0% |
| Hungary | 102 | 82 | 115 | 80 | 110 | 37,5% | 7,8% |
| Poland | 207 | 175 | 175 | 175 | 300 | 71,4% | 45,1% |
| Slovakia | 20 | 20 | 20 | 20 | 20 | 0,0% | 0,0% |
| Croatia | 10 | 10 | 10 | 10 | 10 | 0,0% | 0,0% |
| Total EU | 10.462 | 10.003 | 10.760 | 10.295 | 10.463 | 1,6% | 0,0% |

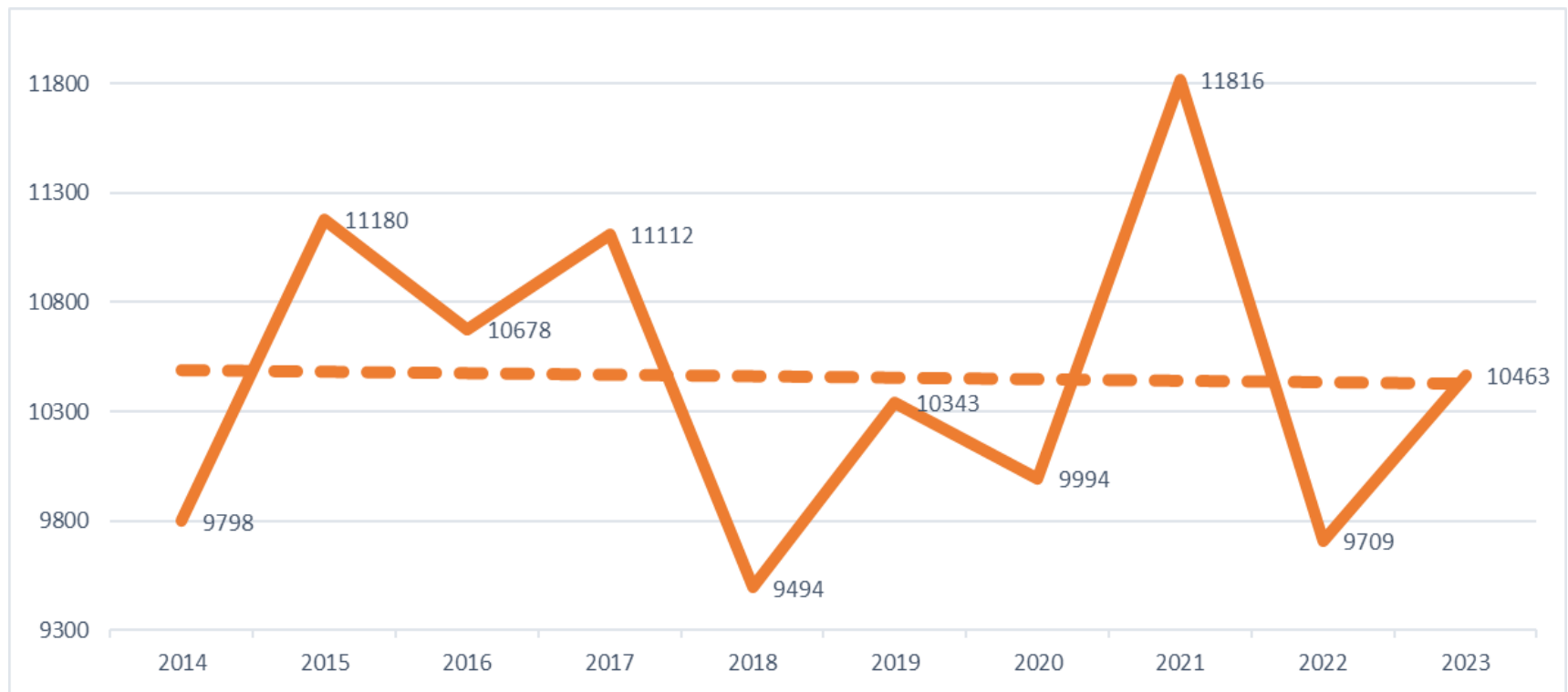
EU vs World

Tomatoes for processing

(Estimation crop 2023)

| | Average 2016/2022 | FINAL 2020 | FINAL 2021 | FINAL 2022 | FINAL 2023 (estimation) | VARIATION 2023 vs 2022 | VARIATION 2023 vs average 2016/2022 |
|-----------------|----------------------|---------------|---------------|---------------|----------------------------|------------------------------|--|
| European Union | 10.462 | 10.003 | 10.760 | 10.295 | 10.463 | 1,6% | 0,0% |
| Other Countries | 27.646 | 28.387 | 28.424 | 27.694 | 33.009 | 19,2% | 19,4% |
| GENERAL TOTAL | 38.107 | 38.390 | 39.184 | 37.989 | 43.472 | 14,4% | 14,1% |
| % UE | 27,5% | 26,1% | 27,5% | 27,1% | 24,1% | | |

Staticity of Historical European production of processing tomatoes (x.000 ton)



The 2023 tomato campaign was characterized by a further increase in fresh tomato prices, energy and packaging costs in the European areas

**The question of our June presentation
was the same as always:**

*Will the market be able to absorb this
dramatic increase in the costs, especially
in products with lower added value,
remembering that Europe is a net
exporting area of tomato products?*

There is a strong differentiation of production specialization in the main European production areas of processing tomatoes. This fact favors a unique analysis of European trade with the rest of the world..

IMPORT/EXPORT (tons) EU DIVIDED BY CN8

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------------------|------------------|------------------|------------------|------------------|----------------|
| EXPORT | 1.631.108 | 1.718.758 | 1.813.776 | 1.713.120 | 1.823.127 | 778.168 |
| 07108070_Tomatoes, uncooked or cooked, frozen | 9.482 | 11.992 | 11.463 | 7.413 | 5.169 | 1.725 |
| 07129030_Dried Tomatoes (powder) | 3.002 | 2.979 | 2.135 | 1.749 | 1.742 | 776 |
| 20021010_Peeled Tomatoes | 636.125 | 658.626 | 664.127 | 516.416 | 564.568 | 242.677 |
| 20021090_Unpeeled Tomatoes | 247.199 | 248.400 | 277.378 | 339.820 | 353.491 | 147.317 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 32.414 | 32.191 | 30.309 | 30.666 | 37.123 | 17.272 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 96.240 | 108.403 | 139.036 | 124.767 | 121.501 | 58.173 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 131.367 | 143.516 | 142.742 | 98.549 | 102.187 | 46.213 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 41.440 | 59.952 | 79.568 | 71.937 | 82.269 | 35.855 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 152.515 | 153.688 | 153.926 | 161.705 | 148.857 | 44.767 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 12.224 | 10.004 | 10.660 | 12.422 | 13.552 | 5.469 |
| 20095010_Tomato Juice < 7% whit sugar | 901 | 792 | 424 | 203 | 408 | 214 |
| 20095090_Tomato Juice < 7% | 11.926 | 12.472 | 8.722 | 10.819 | 13.938 | 6.349 |
| 21032000_Ketchup and other sauces | 256.273 | 275.742 | 293.287 | 336.656 | 378.324 | 171.361 |
| IMPORT | 254.179 | 257.235 | 290.767 | 399.710 | 374.620 | 245.004 |
| 07108070_Tomatoes, uncooked or cooked , frozen | 8.328 | 8.319 | 8.155 | 9.264 | 10.502 | 5.543 |
| 07129030_Dried Tomatoes (powder) | 18.258 | 19.480 | 20.894 | 20.966 | 16.061 | 6.743 |
| 20021010_Peeled Tomatoes | 6.872 | 7.455 | 5.186 | 6.480 | 8.555 | 4.107 |
| 20021090_Unpeeled Tomatoes | 18.521 | 16.876 | 17.094 | 15.964 | 24.329 | 13.326 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 3.687 | 4.156 | 2.274 | 14.388 | 8.896 | 9.662 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 2.826 | 2.096 | 4.274 | 7.417 | 9.204 | 8.184 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 61.916 | 54.194 | 70.515 | 102.019 | 72.553 | 53.535 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 11.086 | 10.439 | 18.513 | 14.151 | 16.986 | 7.405 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 71.330 | 81.165 | 93.220 | 164.965 | 157.505 | 110.702 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 1.769 | 1.368 | 3.407 | 3.294 | 4.436 | 2.392 |
| 20095010_Tomato Juice < 7% whit sugar | 547 | 771 | 964 | 879 | 535 | 275 |
| 20095090_Tomato Juice < 7% | 1.839 | 1.777 | 1.576 | 1.812 | 1.105 | 506 |
| 21032000_Ketchup and other sauces | 47.200 | 49.140 | 44.696 | 38.110 | 43.952 | 22.625 |

Source: Eurostat

IMPORT/EXPORT (1.000 ECU) EU DIVIDED BY CN8

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------------------|------------------|------------------|------------------|------------------|------------------|
| EXPORT | 1.314.288 | 1.437.075 | 1.640.156 | 1.659.064 | 2.104.144 | 1.104.139 |
| 07108070_Tomatoes, uncooked or cooked, frozen | 11.923 | 16.298 | 19.850 | 9.545 | 6.213 | 1.845 |
| 07129030_Dried Tomatoes (powder) | 9.603 | 10.750 | 8.168 | 7.167 | 8.206 | 4.797 |
| 20021010_Peeled Tomatoes | 395.981 | 428.462 | 470.695 | 389.770 | 533.785 | 281.320 |
| 20021090_Unpeeled Tomatoes | 192.479 | 198.334 | 229.888 | 294.782 | 340.978 | 179.525 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 20.233 | 21.109 | 21.482 | 21.675 | 30.821 | 18.052 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 70.852 | 79.868 | 112.254 | 111.879 | 125.943 | 71.244 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 101.350 | 115.188 | 114.288 | 86.399 | 117.520 | 68.921 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 56.572 | 78.950 | 109.545 | 110.342 | 162.735 | 83.915 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 138.031 | 142.773 | 145.723 | 160.350 | 199.677 | 93.862 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 17.881 | 14.938 | 17.314 | 22.362 | 28.448 | 14.853 |
| 20095010_Tomato Juice < 7% whit sugar | 672 | 590 | 261 | 174 | 629 | 350 |
| 20095090_Tomato Juice < 7% | 8.323 | 8.415 | 5.941 | 6.754 | 10.161 | 5.288 |
| 21032000_Ketchup and other sauces | 290.387 | 321.401 | 384.749 | 437.865 | 539.030 | 280.168 |
| IMPORT | 266.889 | 286.428 | 307.511 | 393.032 | 484.607 | 355.680 |
| 07108070_Tomatoes, uncooked or cooked , frozen | 19.204 | 20.068 | 18.331 | 21.077 | 27.082 | 14.518 |
| 07129030_Dried Tomatoes (powder) | 46.137 | 51.367 | 52.474 | 51.712 | 48.754 | 25.906 |
| 20021010_Peeled Tomatoes | 7.784 | 8.028 | 7.284 | 5.206 | 7.123 | 4.216 |
| 20021090_Unpeeled Tomatoes | 35.295 | 34.878 | 31.073 | 30.753 | 45.386 | 29.548 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 1.188 | 3.505 | 1.721 | 11.194 | 7.824 | 12.738 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 2.080 | 1.783 | 2.800 | 4.811 | 7.586 | 8.980 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 39.536 | 37.331 | 48.789 | 73.620 | 71.528 | 62.237 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 10.874 | 12.638 | 19.694 | 13.927 | 21.900 | 12.730 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 48.475 | 59.920 | 71.685 | 134.714 | 187.403 | 147.528 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 1.770 | 1.607 | 3.900 | 3.268 | 5.825 | 4.508 |
| 20095010_Tomato Juice < 7% whit sugar | 595 | 935 | 982 | 873 | 907 | 466 |
| 20095090_Tomato Juice < 7% | 1.015 | 1.004 | 938 | 1.131 | 884 | 450 |
| 21032000_Ketchup and other sauces | 52.937 | 53.364 | 47.840 | 40.745 | 52.405 | 31.853 |

Source: Eurostat

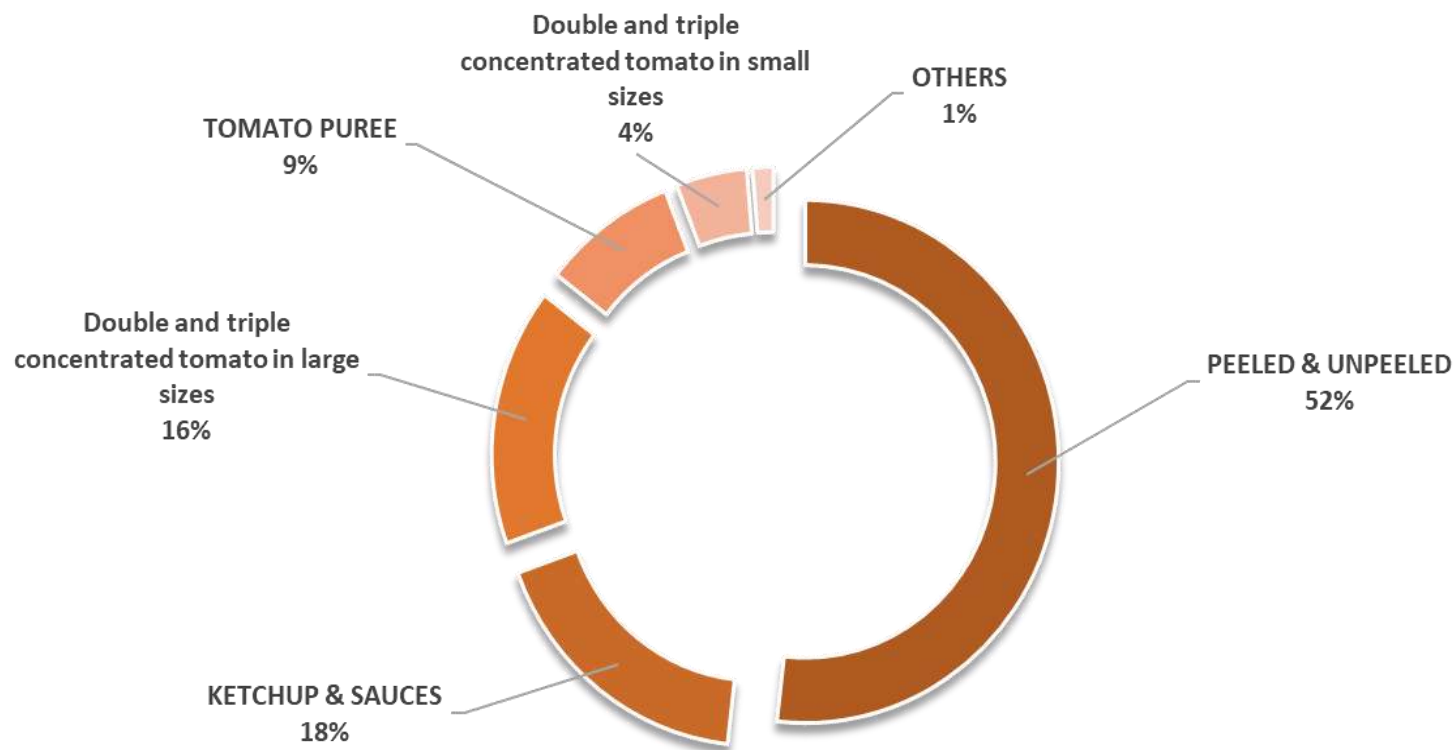
IMPORT-EXPORT (€/ton) BY CN8-

Increase the unit value

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|--------------|--------------|--------------|------------|--------------|--------------|
| EXPORT | 806 | 836 | 904 | 968 | 1.154 | 1.419 |
| 07108070_Tomatoes, uncooked or cooked by steaming or by boiling in water, frozen | 1.257 | 1.359 | 1.732 | 1.288 | 1.202 | 1.070 |
| 07129030_Dried Tomatoes (powder) | 3.199 | 3.608 | 3.826 | 4.098 | 4.711 | 6.179 |
| 20021010_Peeled Tomatoes | 622 | 651 | 709 | 755 | 945 | 1.159 |
| 20021090_Unpeeled Tomatoes | 779 | 798 | 829 | 867 | 965 | 1.219 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 624 | 656 | 709 | 707 | 830 | 1.045 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 736 | 737 | 807 | 897 | 1.037 | 1.225 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 772 | 803 | 801 | 877 | 1.150 | 1.491 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 1.365 | 1.317 | 1.377 | 1.534 | 1.978 | 2.340 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 905 | 929 | 947 | 992 | 1.341 | 2.097 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 1.463 | 1.493 | 1.624 | 1.800 | 2.099 | 2.716 |
| 20095010_Tomato Juice < 7% whit sugar | 746 | 745 | 615 | 856 | 1.541 | 1.632 |
| 20095090_Tomato Juice < 7% | 698 | 675 | 681 | 624 | 729 | 833 |
| 21032000_Ketchup and other sauces | 1.133 | 1.166 | 1.312 | 1.301 | 1.425 | 1.635 |
| IMPORT | 1.050 | 1.113 | 1.058 | 983 | 1.294 | 1.452 |
| 07108070_Tomatoes, uncooked or cooked by steaming or by boiling in water, frozen | 2.306 | 2.412 | 2.248 | 2.275 | 2.579 | 2.619 |
| 07129030_Dried Tomatoes (powder) | 2.527 | 2.637 | 2.511 | 2.466 | 3.036 | 3.842 |
| 20021010_Peeled Tomatoes | 1.133 | 1.077 | 1.404 | 803 | 833 | 1.027 |
| 20021090_Unpeeled Tomatoes | 1.906 | 2.067 | 1.818 | 1.926 | 1.866 | 2.217 |
| 20029011_Tomatoes whit dry matters < 12% and packaging > 1 kg | 322 | 843 | 757 | 778 | 879 | 1.318 |
| 20029019_Tomatoes whit dry matters < 12% and packaging <= 1 kg | 736 | 851 | 655 | 649 | 824 | 1.097 |
| 20029031_Tomatoes whit dry matters 12-30% and packaging > 1 kg | 639 | 689 | 692 | 722 | 986 | 1.163 |
| 20029039_Tomatoes whit dry matters 12-30% and packaging <= 1 kg | 981 | 1.211 | 1.064 | 984 | 1.289 | 1.719 |
| 20029091_Tomatoes whit dry matters > 30% and packaging > 1 kg | 680 | 738 | 769 | 817 | 1.190 | 1.333 |
| 20029099_Tomatoes whit dry matters > 30% and packaging <= 1 kg | 1.000 | 1.174 | 1.145 | 992 | 1.313 | 1.885 |
| 20095010_Tomato Juice < 7% whit sugar | 1.087 | 1.213 | 1.019 | 993 | 1.694 | 1.696 |
| 20095090_Tomato Juice < 7% | 552 | 565 | 595 | 624 | 801 | 890 |
| 21032000_Ketchup and other sauces | 1.122 | 1.086 | 1.070 | 1.069 | 1.192 | 1.408 |

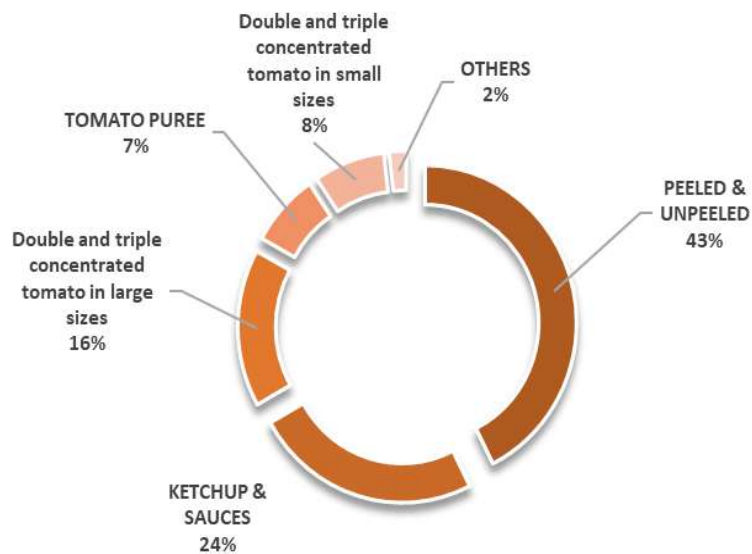
Source: Eurostat

EXPORT – DISTRIBUTION BY GROS PRODUCT – FIVE-YEARS AVERAGE

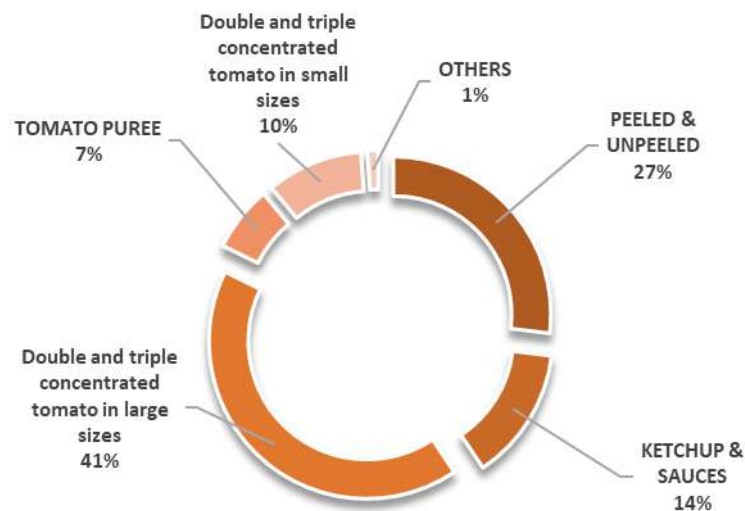


EXPORT – DISTRIBUTION BY VALUE AND FRESH TOMATOES EQUIVALENT – FIVE-YEARS AVERAGE

Value

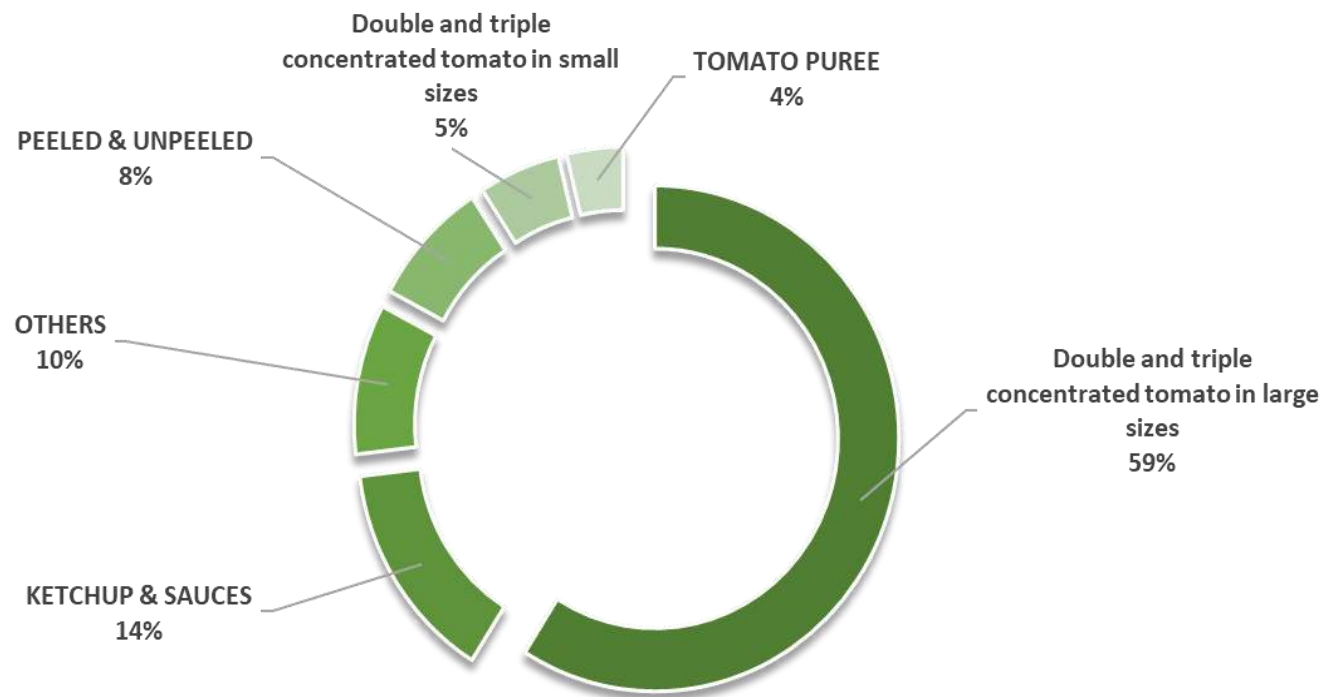


Fresh Tomatoes Equivalent (estimation)



Source: Eurostat

IMPORT – DISTRIBUTION BY GROS PRODUCT – FIVE-YEARS AVERAGE



The European export/import balance in 2023 tends to decline in quantity but not in value

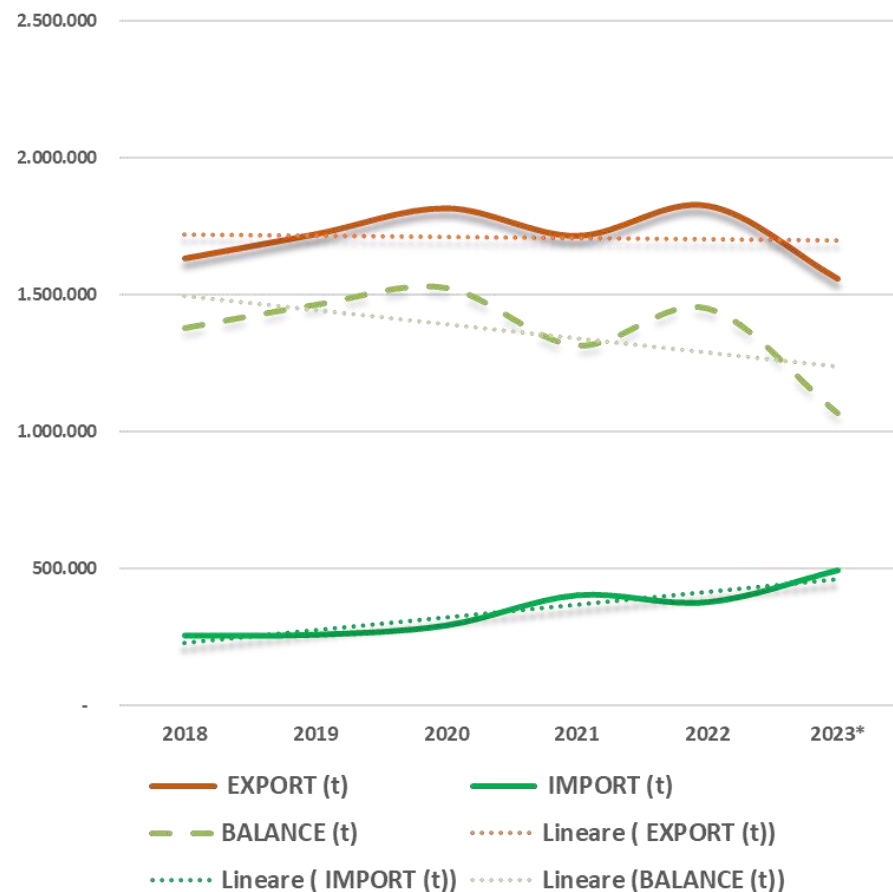
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023* |
|-------------|-----------|-----------|-----------|-----------|-----------|-----------|
| EXPORT (t) | 1.631.108 | 1.718.758 | 1.813.776 | 1.713.120 | 1.823.127 | 1.556.337 |
| IMPORT (t) | 254.179 | 257.235 | 290.767 | 399.710 | 374.620 | 490.008 |
| BALANCE (t) | 1.376.930 | 1.461.523 | 1.523.008 | 1.313.410 | 1.448.507 | 1.066.329 |

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023* |
|-------------|-----------|-----------|-----------|-----------|-----------|-----------|
| EXPORT (€) | 1.314.288 | 1.437.075 | 1.640.156 | 1.659.064 | 2.104.144 | 2.208.278 |
| IMPORT (€) | 266.889 | 286.428 | 307.511 | 393.032 | 484.607 | 711.360 |
| BALANCE (€) | 1.047.399 | 1.150.647 | 1.332.645 | 1.266.032 | 1.619.537 | 1.496.918 |

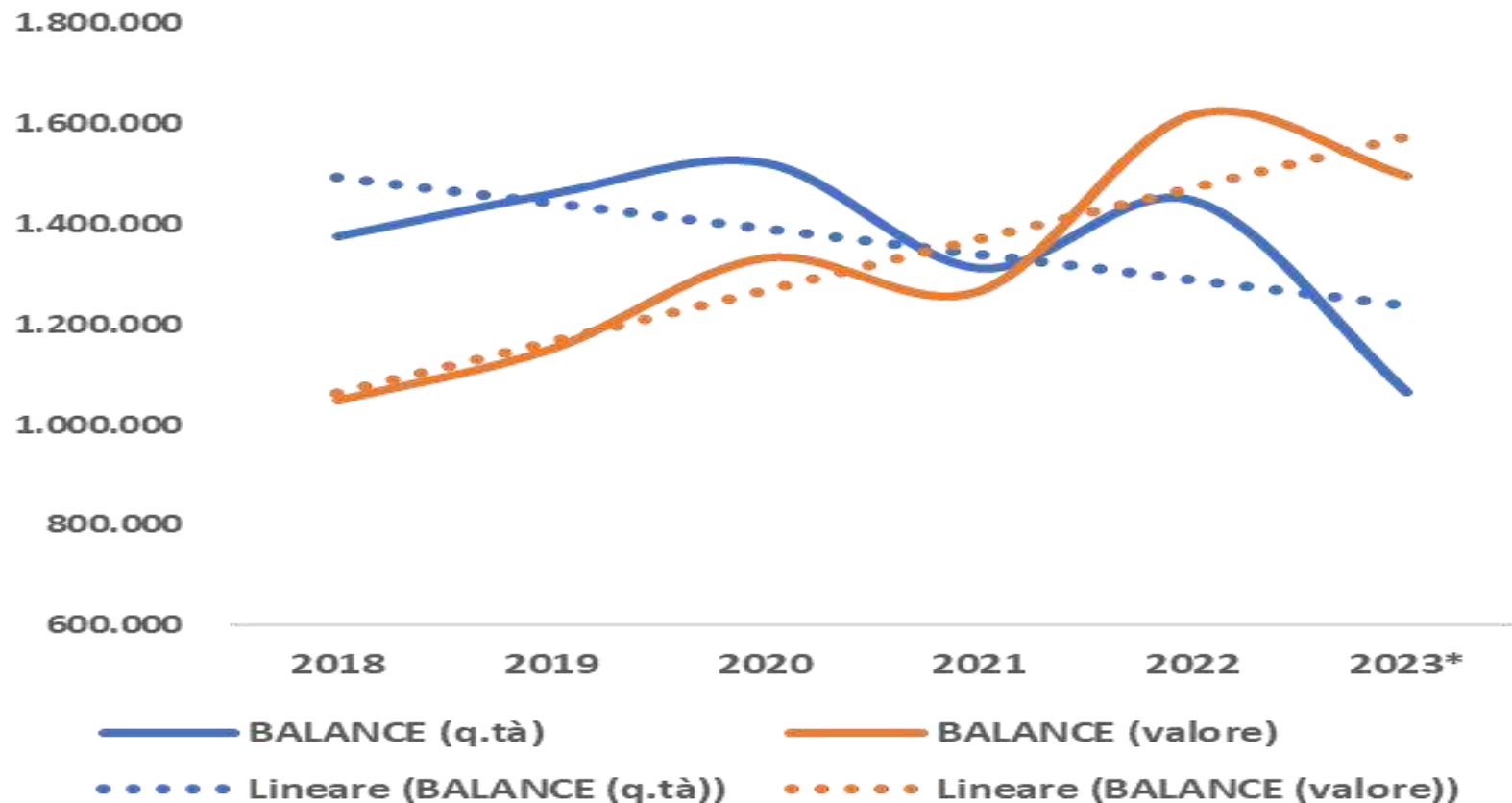
| | | | | | | |
|-------------|-----------|-----------|-----------|-----------|-----------|-----------|
| BALANCE (t) | 1.376.930 | 1.461.523 | 1.523.008 | 1.313.410 | 1.448.507 | 1.066.329 |
| BALANCE(€) | 1.047.399 | 1.150.647 | 1.332.645 | 1.266.032 | 1.619.537 | 1.496.918 |

BALANCE EXPORT/IMPORT UE

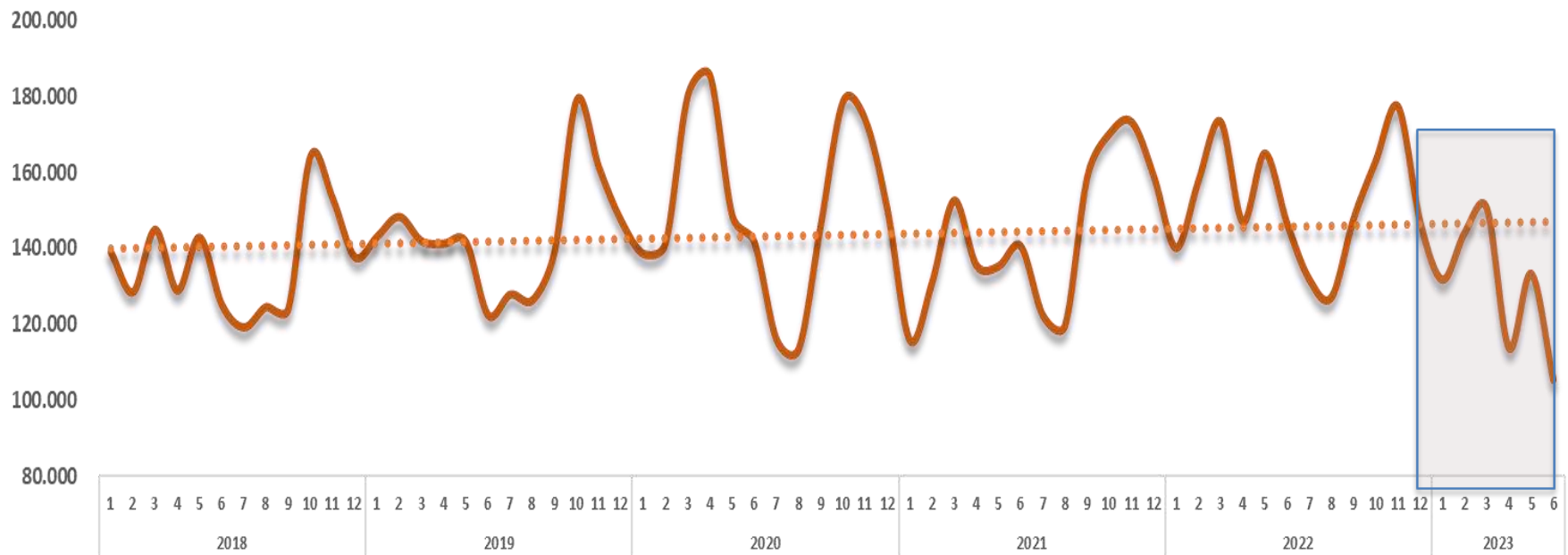
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023* |
|-------------|-----------|-----------|-----------|-----------|-----------|-----------|
| EXPORT (t) | 1.631.108 | 1.718.758 | 1.813.776 | 1.713.120 | 1.823.127 | 1.556.337 |
| IMPORT (t) | 254.179 | 257.235 | 290.767 | 399.710 | 374.620 | 490.008 |
| BALANCE (t) | 1.376.930 | 1.461.523 | 1.523.008 | 1.313.410 | 1.448.507 | 1.066.329 |



The export/import balance increases in value and decreases in quantity

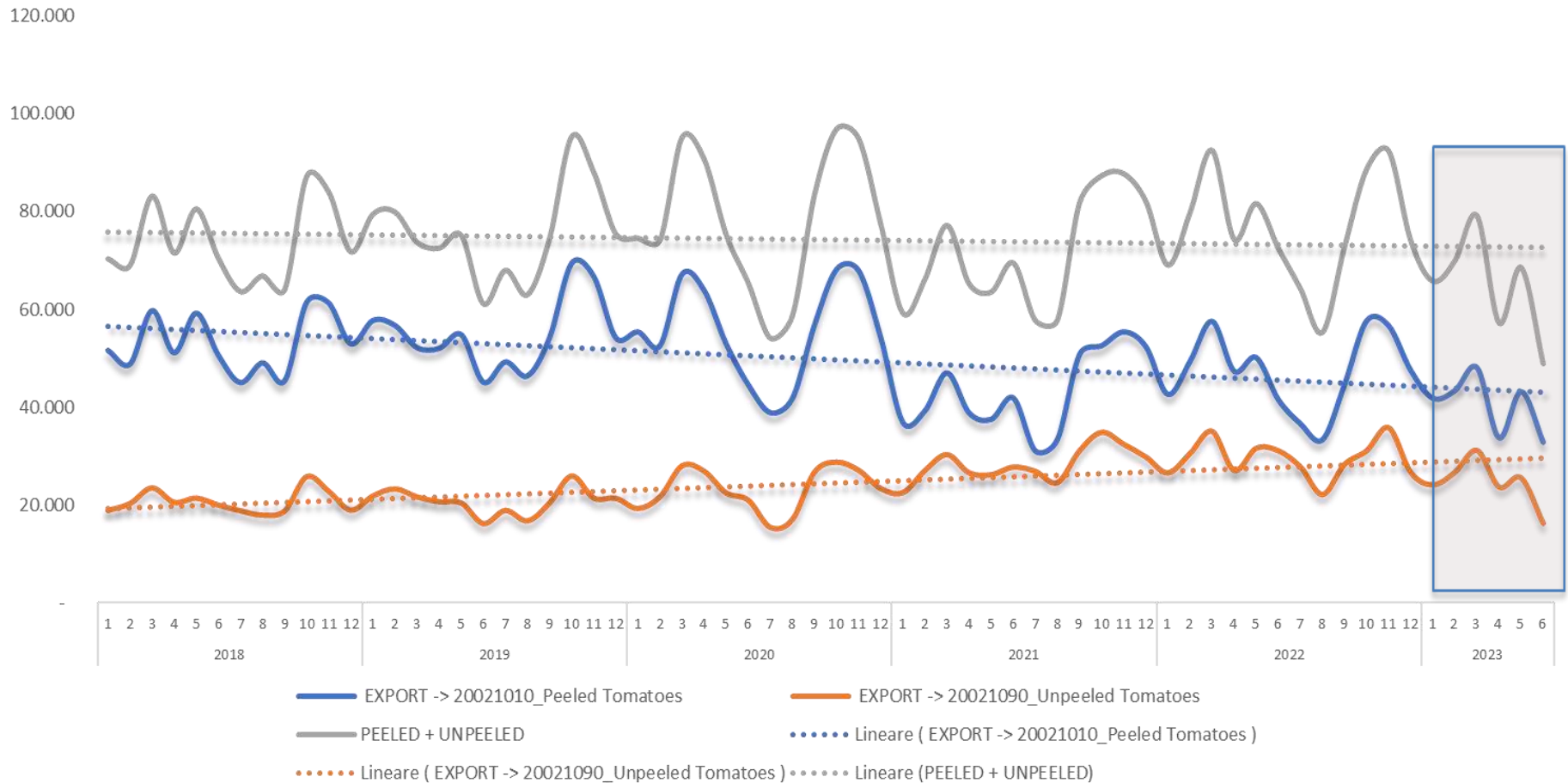


Monthly trend of European exports in tonnes (note the decline in the first half of 2023)



Source: Eurostat

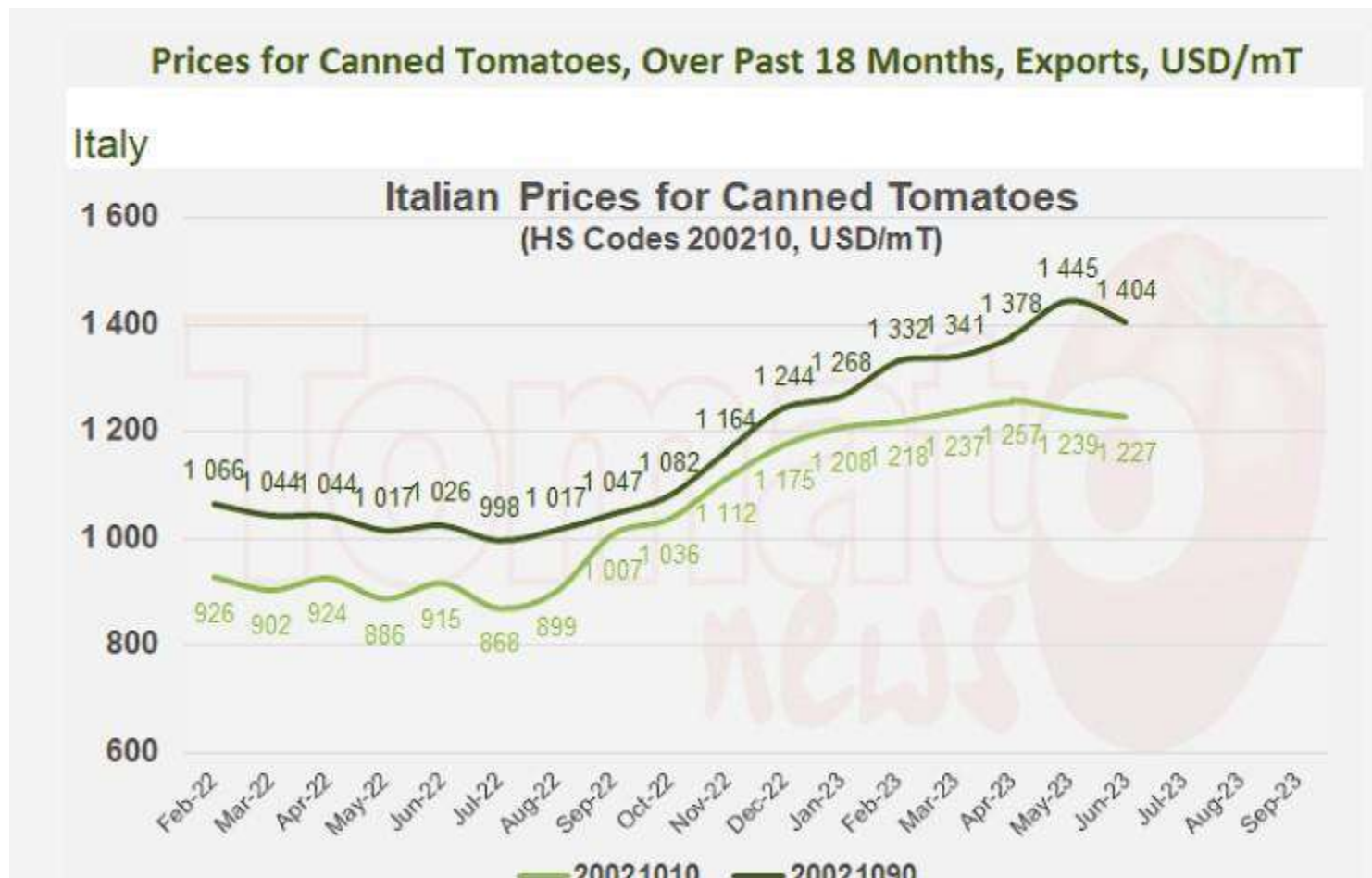
PEELED + UNPEELED TOMATOES EXPORTS (t) ON A MONTHLY BASIS



Source: Eurostat

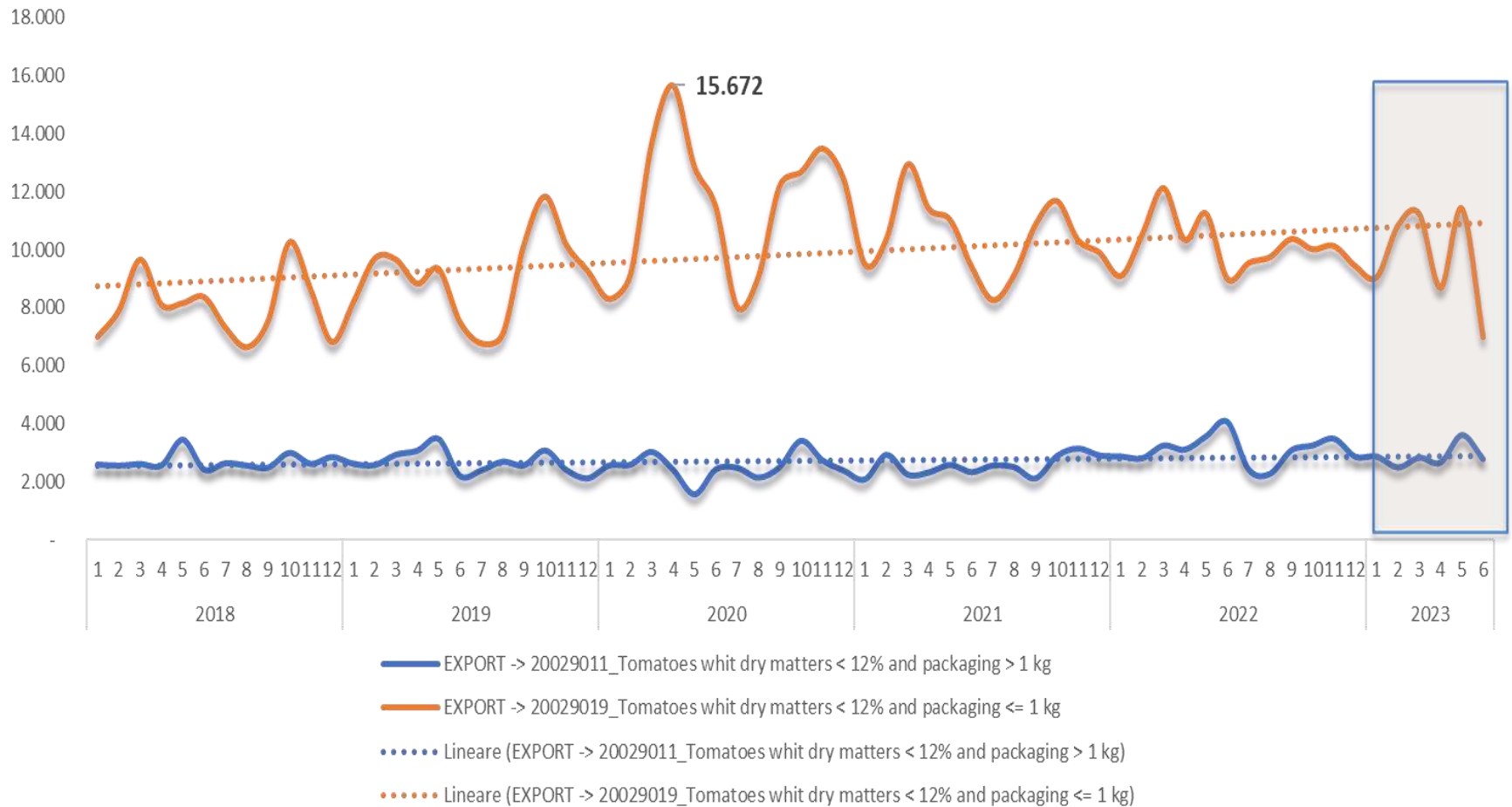
PEELED + UNPEELED TOMATOES

Do prices tend to decline after strong growth?



Source: Tomato News

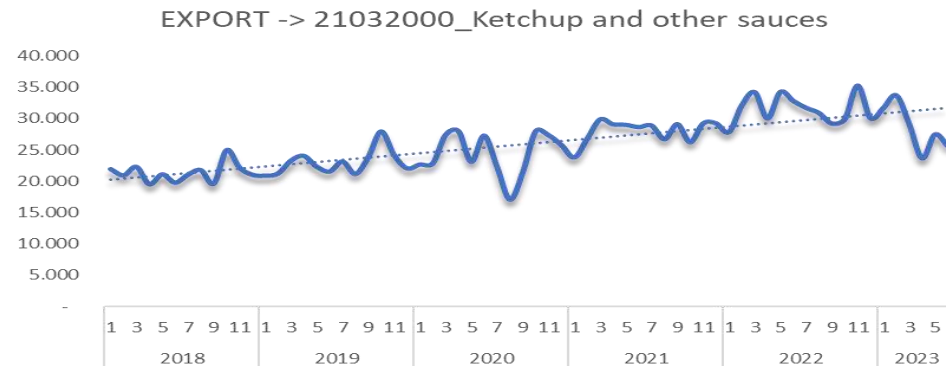
PASSATA (TOMATO PUREE) – TREND EXPORT (t) MONTHLY



Source: Eurostat

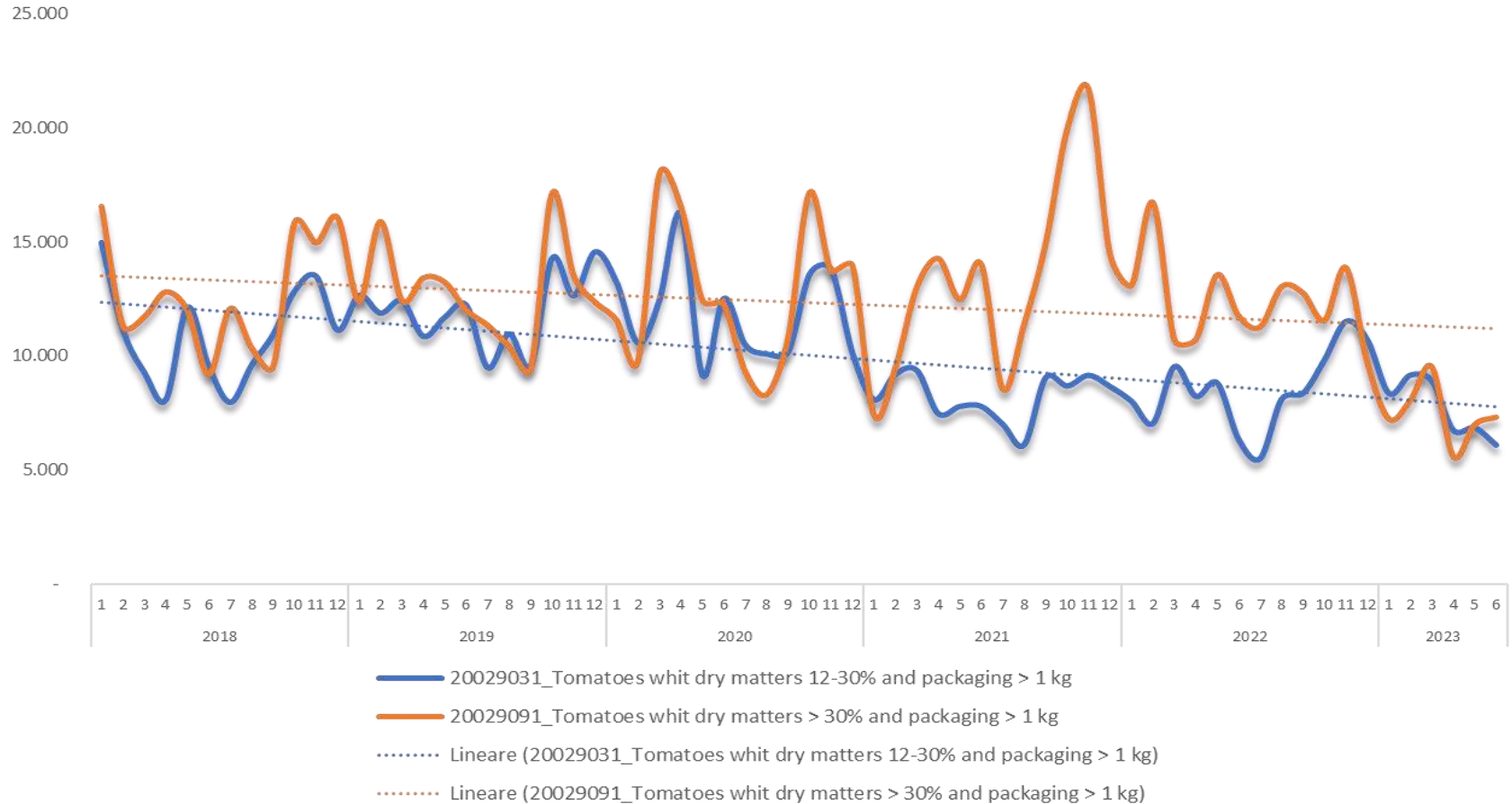
KETCHUP AND SAUCES – MONTHLY EVOLUTION OF EUROPEAN EXPORT

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------|---------|---------|---------|---------|---------------|--------|
| United Kingdom | 152.095 | 154.251 | 148.545 | 182.615 | 184.063 | 85.138 |
| Türkiye | 3.399 | 3.053 | 4.118 | 6.564 | 53.390 | 16.092 |
| Switzerland | 17.052 | 17.413 | 19.818 | 20.239 | 20.184 | 9.637 |
| Norway | 9.288 | 10.090 | 11.242 | 12.516 | 12.768 | 6.898 |
| Morocco | 1.881 | 3.153 | 7.664 | 9.986 | 12.588 | 5.941 |
| Australia | 9.237 | 13.257 | 16.433 | 12.890 | 12.570 | 6.908 |
| United States | 6.212 | 8.491 | 12.397 | 12.467 | 10.292 | 3.462 |
| Israel | 7.648 | 8.686 | 7.117 | 7.875 | 8.555 | 4.333 |
| Japan | 4.178 | 4.747 | 6.718 | 6.617 | 6.107 | 2.496 |
| Russian Federation | 4.322 | 4.878 | 6.457 | 9.617 | 4.898 | 1.688 |



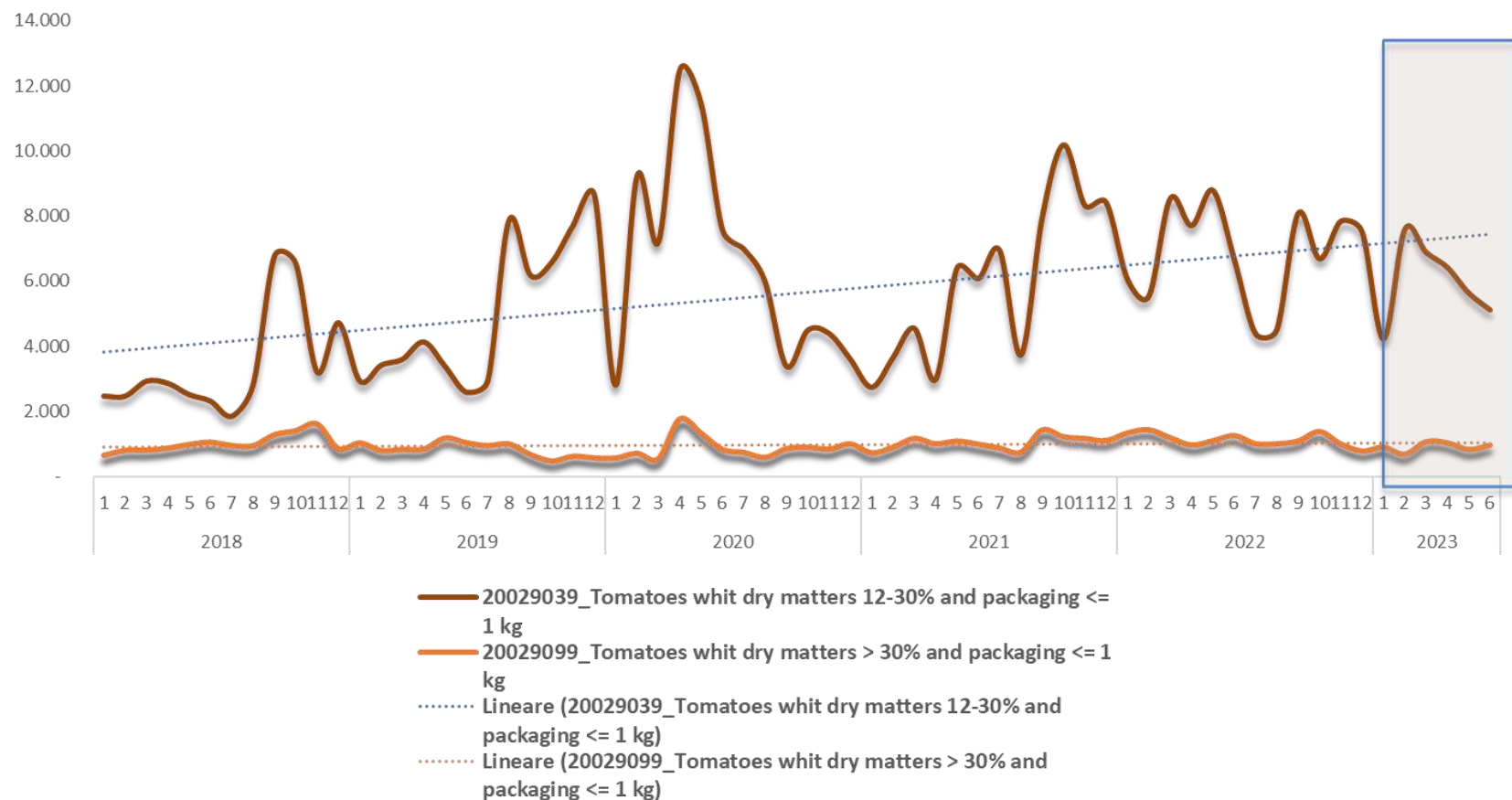
Source: Eurostat

EXPORT – DOUBLE + TRIPLE CONCENTRATE IN LARGE FORMATS - MONTHLY



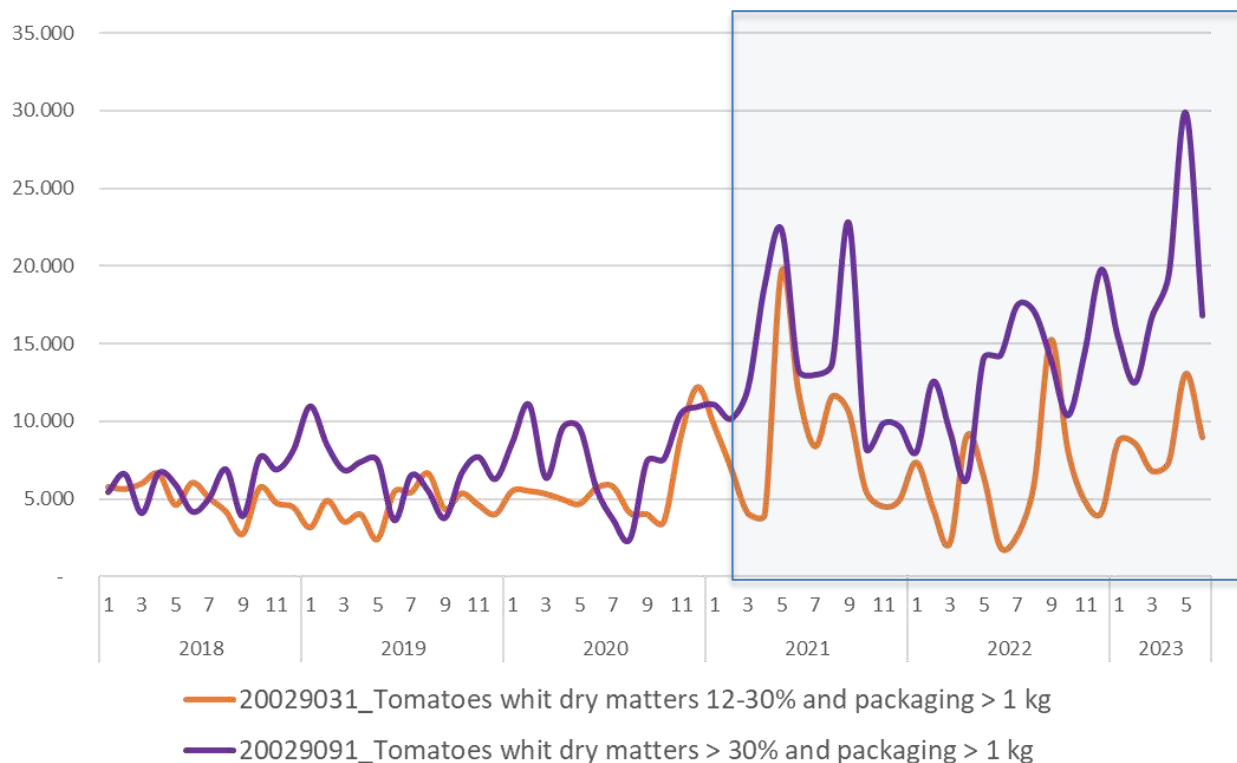
Source: Eurostat

EXPORT – DOUBLE + TRIPLE CONCENTRATE IN SMALL FORMATS - MONTHLY



Source: Eurostat

DOUBLE AND TRIPLE CONCENTRATE IN LARGE SIZES - MONTHLY EUROPEAN IMPORT (t)

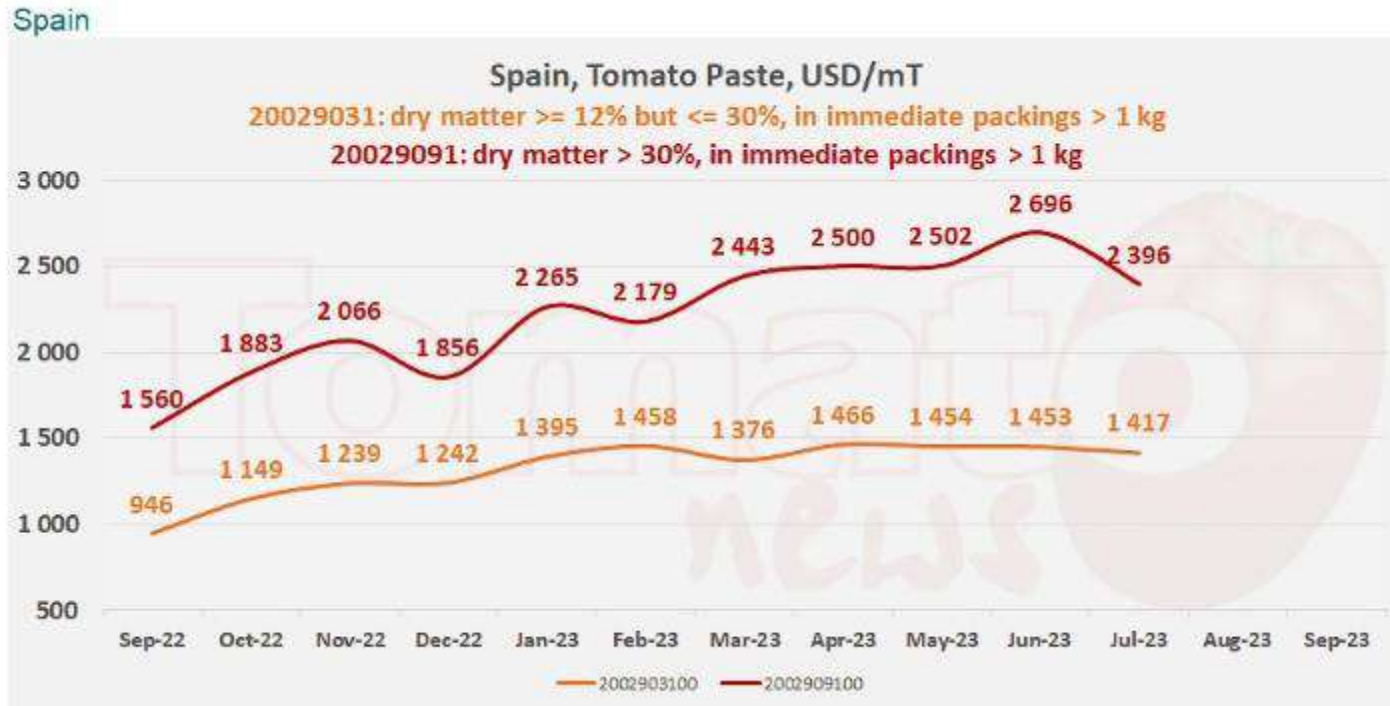


| | 2021 | 2022 |
|---------------------------|--------|---------|
| China | 85.852 | 112.309 |
| United States | 55.357 | 35.182 |
| Egypt | 22.991 | 24.319 |
| Ukraine | 45.034 | 18.361 |
| Türkiye | 23.157 | 17.310 |
| Tunisia | 4.500 | 10.132 |
| Chile | 20.808 | 8.257 |
| Iran, Islamic Republic of | 6.106 | 1.704 |
| Israel | 39 | 908 |
| Serbia | 867 | 296 |

Source: Eurostat

TOMATO PASTE

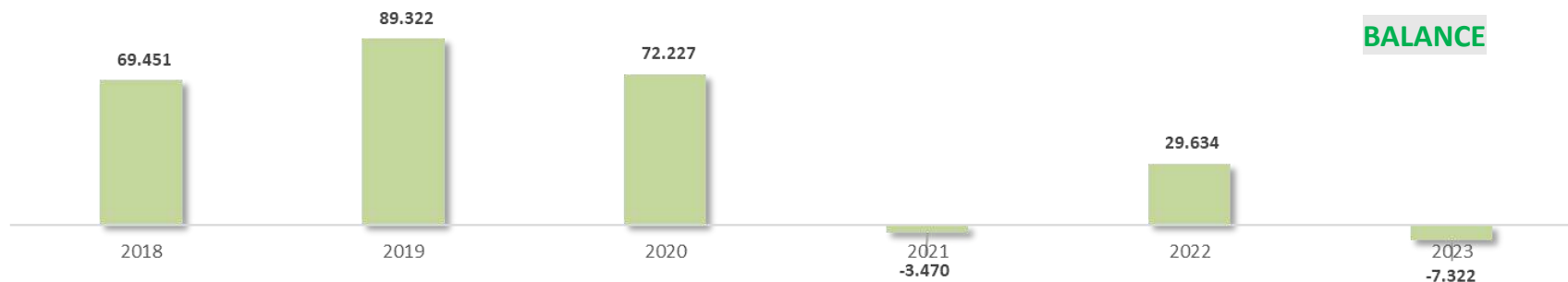
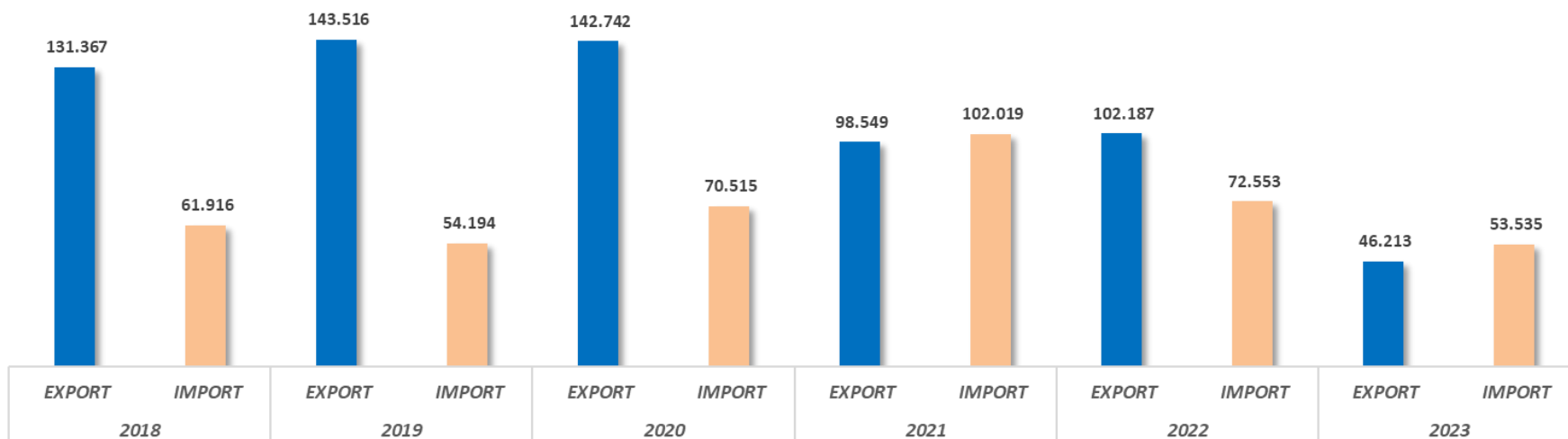
Do prices tend to stabilize after strong growth?



Source: Tomato News

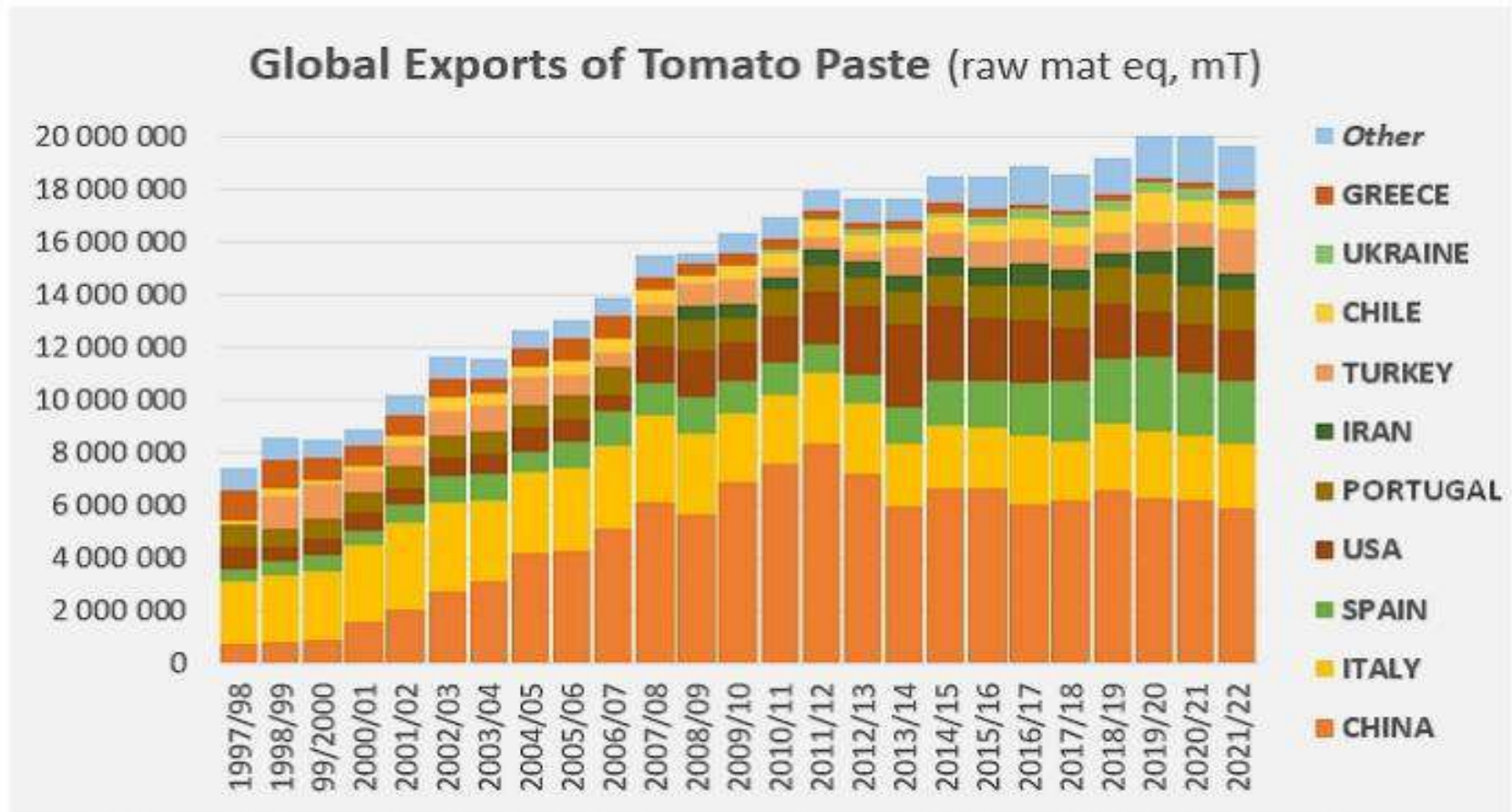
DOUBLE CONCENTRATE LARGE SIZES - IMPORT/EXPORT (t) ANNUAL

THE BALANCE IS BECOMING NEGATIVE



Source: Eurostat

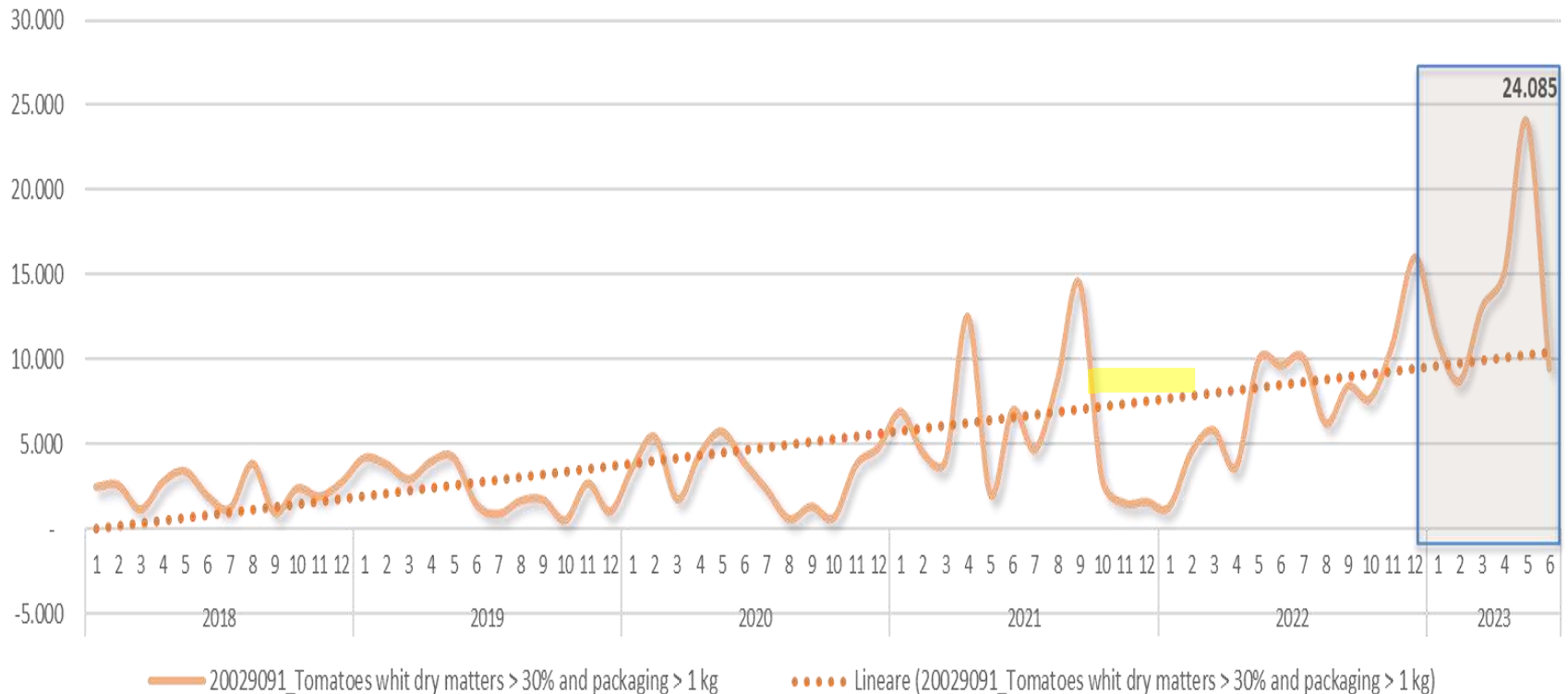
Further analysis will be necessary in the future
on equivalent raw materials
(example)



TOP10: China, Italy, Spain, USA, Portugal, Iran, Turkey, Chile, Ukraine, Greece

The return of China

CHINESE TRIPLE CONCENTRATE IMPORTS IN EUROPE ON A MONTHLY BASIS



Source: Eurostat

Is China "invading" the world?

Chinese export of Tomato Paste - HS 200290 (ton)

| | Unit | 2022/23 | Var° | | | | | |
|----------------|----------|------------------|--------------|----------------|------------------|----------------|--------------|----------------|
| | | | vs 2021/2022 | | vs 3 prev. years | | vs pre-Covid | |
| WestAfrica | T | 251 319 | -8% | -21 121 | -11% | -32 605 | -20% | -64 587 |
| Middle East | T | 222 773 | 105% | 114 049 | 106% | 114 633 | 87% | 103 733 |
| Western EU | T | 175 836 | 86% | 81 500 | 50% | 58 438 | 112% | 92 717 |
| Far East | T | 148 437 | 17% | 21 203 | 21% | 25 280 | 29% | 33 465 |
| EurAsia | T | 128 235 | 19% | 20 041 | 37% | 34 801 | 25% | 25 645 |
| SouthAfrica | T | 58 599 | 72% | 24 623 | 53% | 20 183 | 58% | 21 506 |
| Eastern EU | T | 46 908 | 205% | 31 508 | 144% | 27 675 | 127% | 26 237 |
| Austr NZeal | T | 18 134 | 61% | 6 864 | 62% | 6 921 | 72% | 7 569 |
| Europe Non EU | T | 14 057 | 233% | 9 841 | 80% | 6 251 | 23% | 2 590 |
| EastAfrica | T | 11 134 | -1% | -165 | -34% | -5 774 | -44% | -8 922 |
| CentrAmer | T | 10 979 | 52% | 3 757 | 38% | 3 000 | -8% | -937 |
| MediterrAfrica | T | 10 096 | 146% | 5 988 | 95% | 4 924 | -58% | -13 774 |
| Indian Penins. | T | 9 458 | -46% | -7 954 | -52% | -10 417 | -49% | -9 249 |
| South America | T | 6 261 | 177% | 3 998 | 112% | 3 303 | 33% | 1 556 |
| NorthAmer | T | 821 | 50% | 274 | -21% | -221 | -60% | -1 252 |
| China | T | 702 | 3% | 19 | 25% | 140 | 41% | 205 |
| Total | T | 1 113 749 | 36% | 294 425 | 30% | 256 533 | 24% | 216 501 |

Source: Tomato News

Final considerations

- Slight decreasing trend of European production of fresh tomato for processing
- Stability in European exports with signs of decline in quantity in the first half of 2023
- Growth in imports of semi-finished products for second transformation

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Decline in competitiveness of the European supply chain while domestic consumption grows?



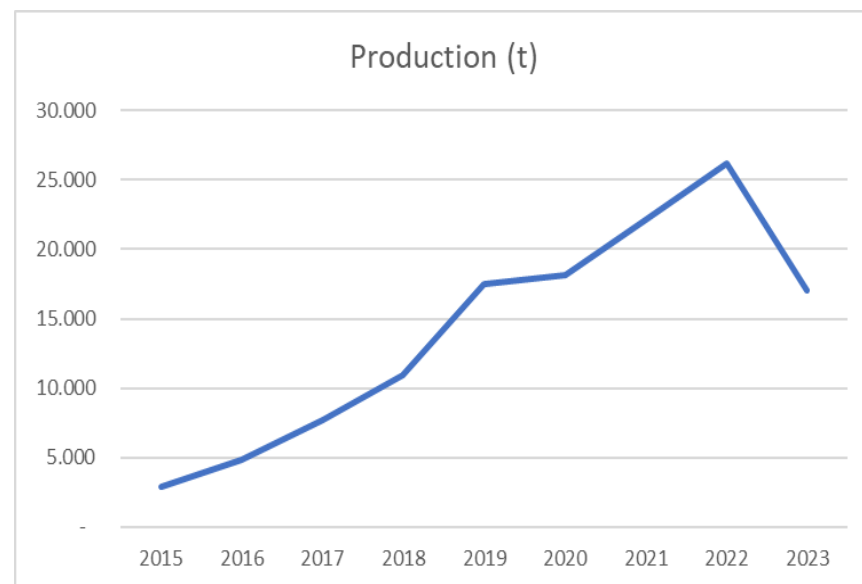
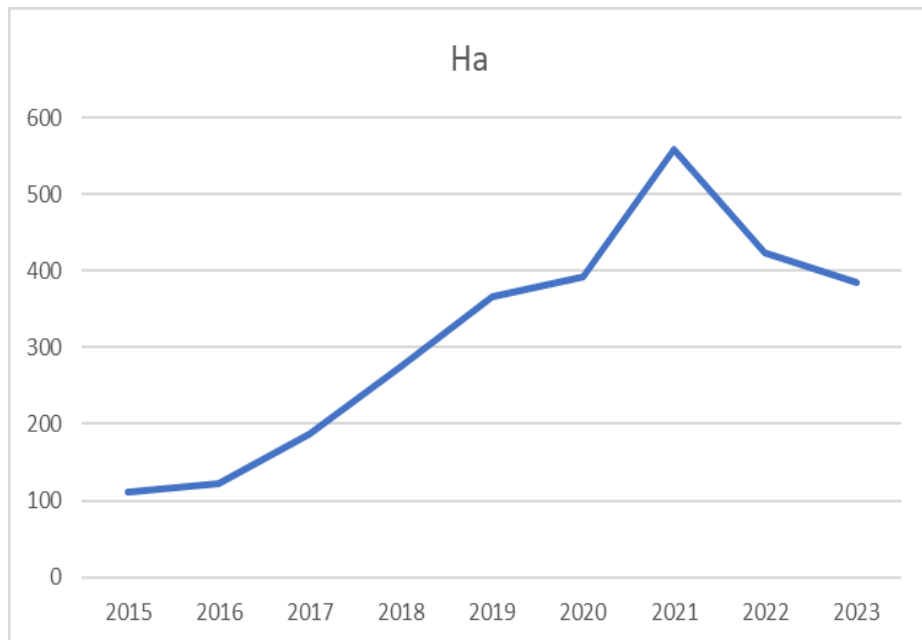
To make a real estimate of the consumption trend, expressed in equivalent fresh tomatoes for processing, we must wait for the 2023 results, since the estimates made on previous data are too conditioned by the 2021 data, a year in which the COVID effect had a strong impact



TomatoEurope
PROCESSORS ASSOCIATION

**The difficulties
of organic production are
confirmed**

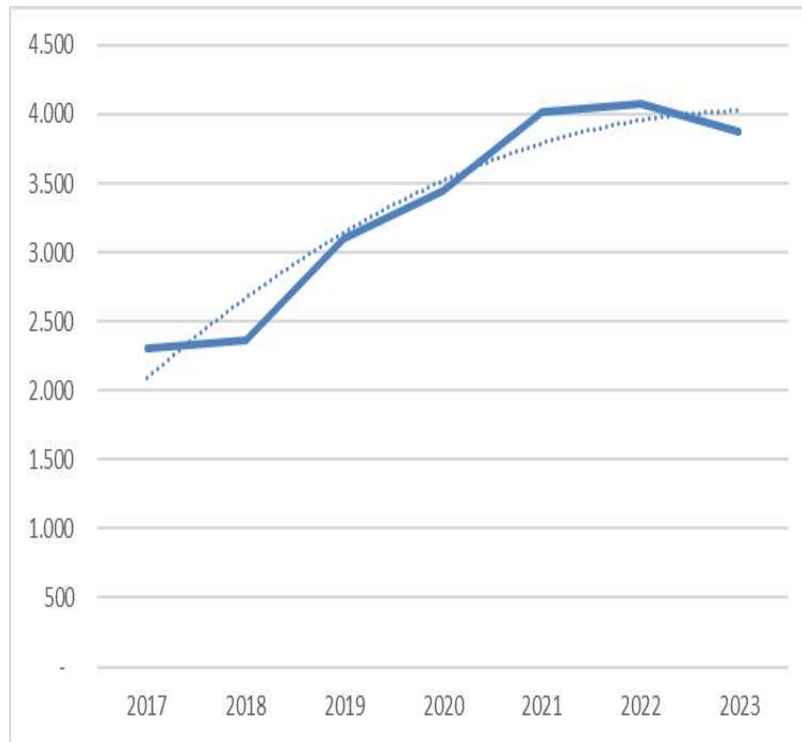
Evolution of organic processing tomato surfaces in France



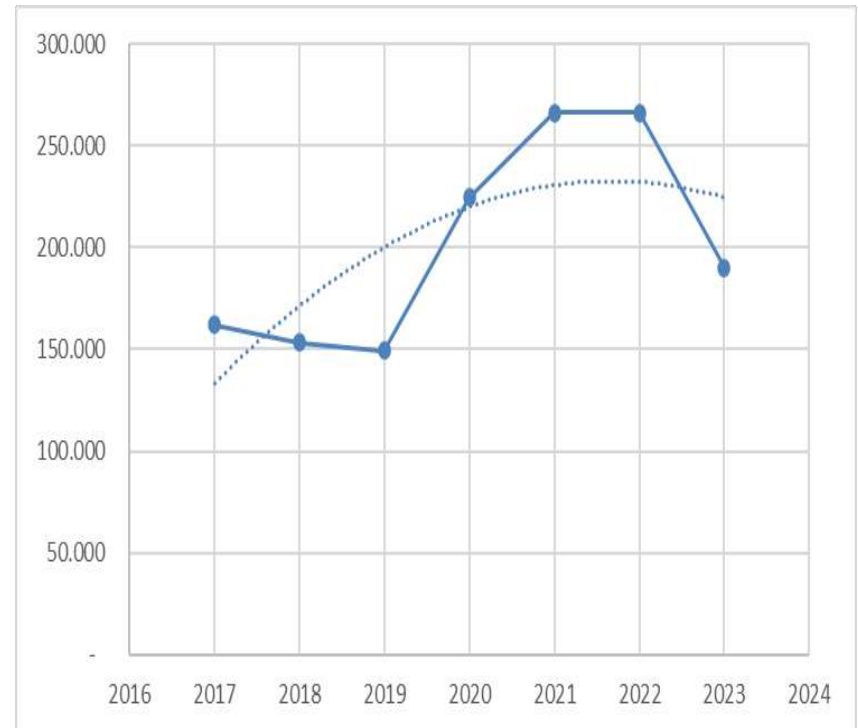
Source: SONITO

Evolution of organic processing tomato surfaces and production in North Italy

Northern Italy - Annual evolution (Ha) of organic tomato production

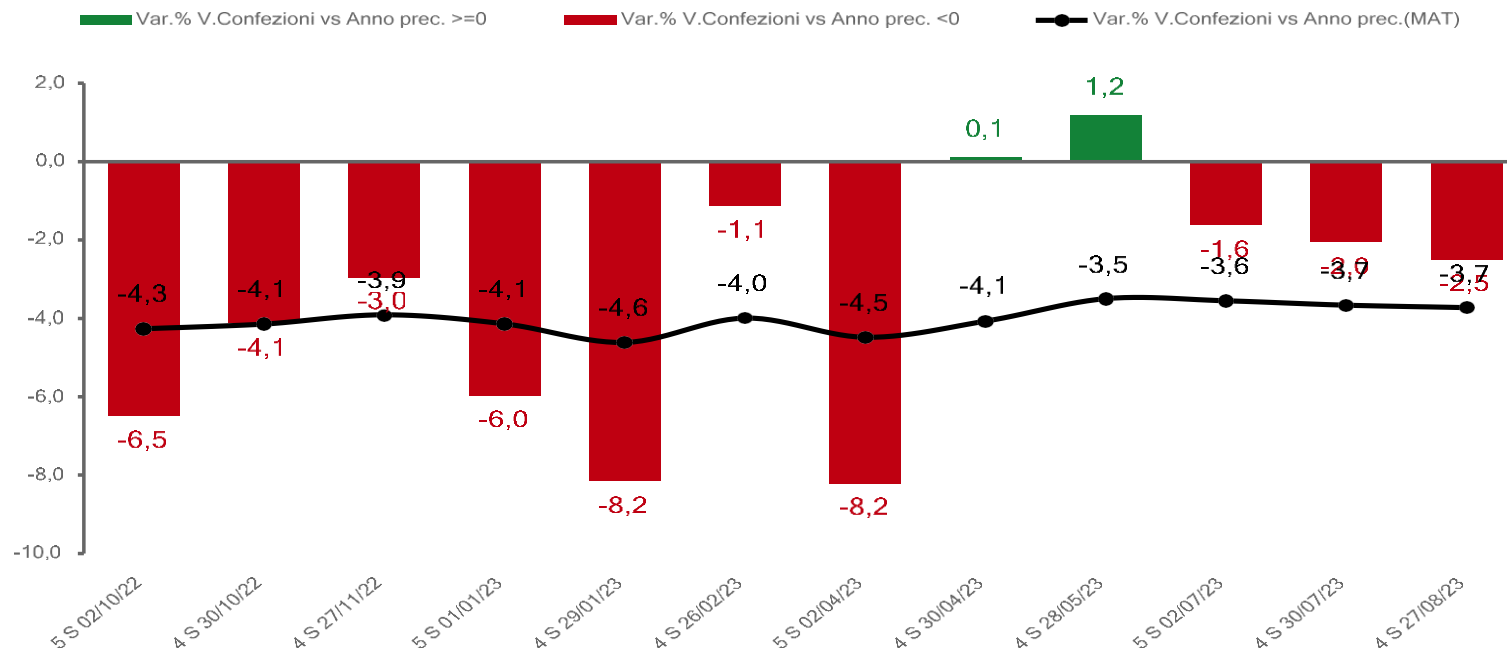


Northern Italy - Annual evolution (t) of organic tomato production



Source: Organismo Interprofessionale pomodoro da industria Nord Italia

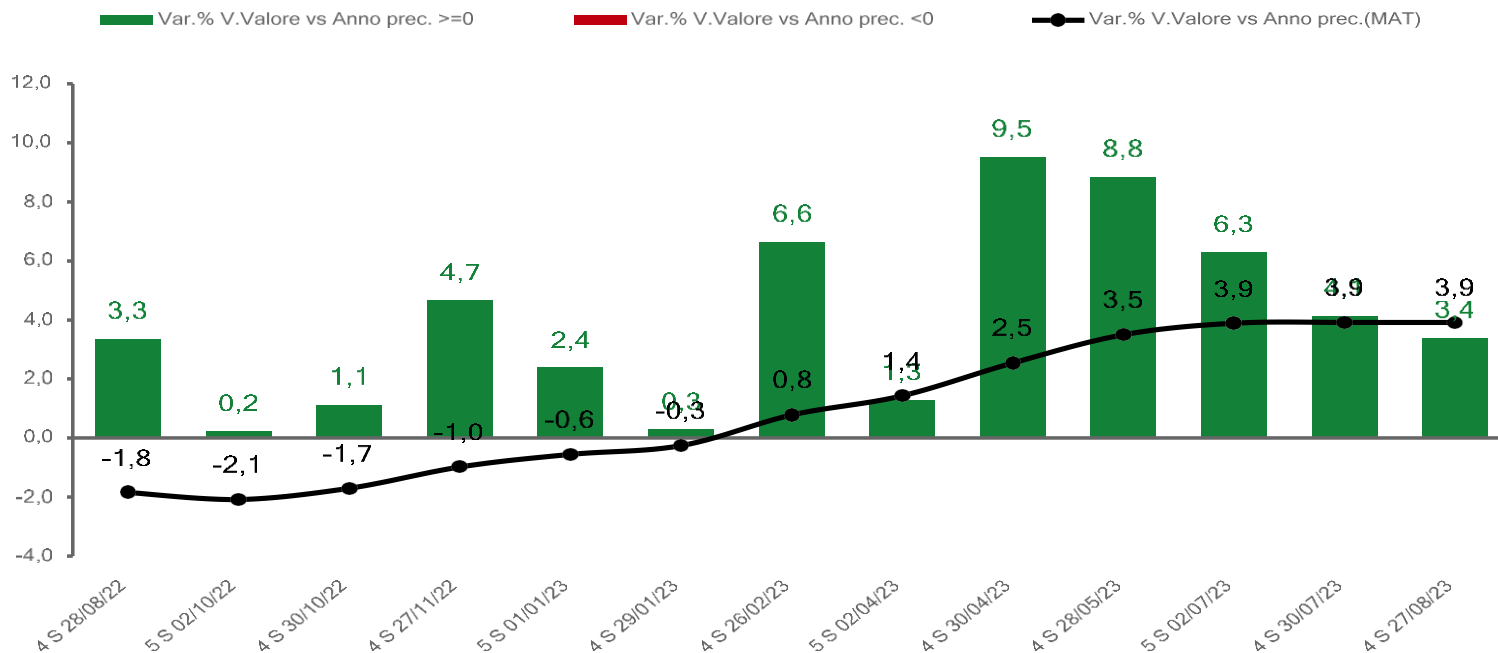
Volume sales trend of the main Italian brands of organic tomato products



Mercato: IT Distribuzione Moderna – Agosto 2023



Value sales trend of the main Italian brands of organic tomato products



Mercato: IT Distribuzione Moderna – Agosto 2023





Thanks for your attention