

REVIEW OF THE SUMMER CAMPAIGN 2023 IN FRANCE



1- BALANCE OF THE SUMMER CAMPAIGN IN TERMS OF PRODUCTION, PRICES, COSTS, PROFITABILITY, SALES AND TRADE

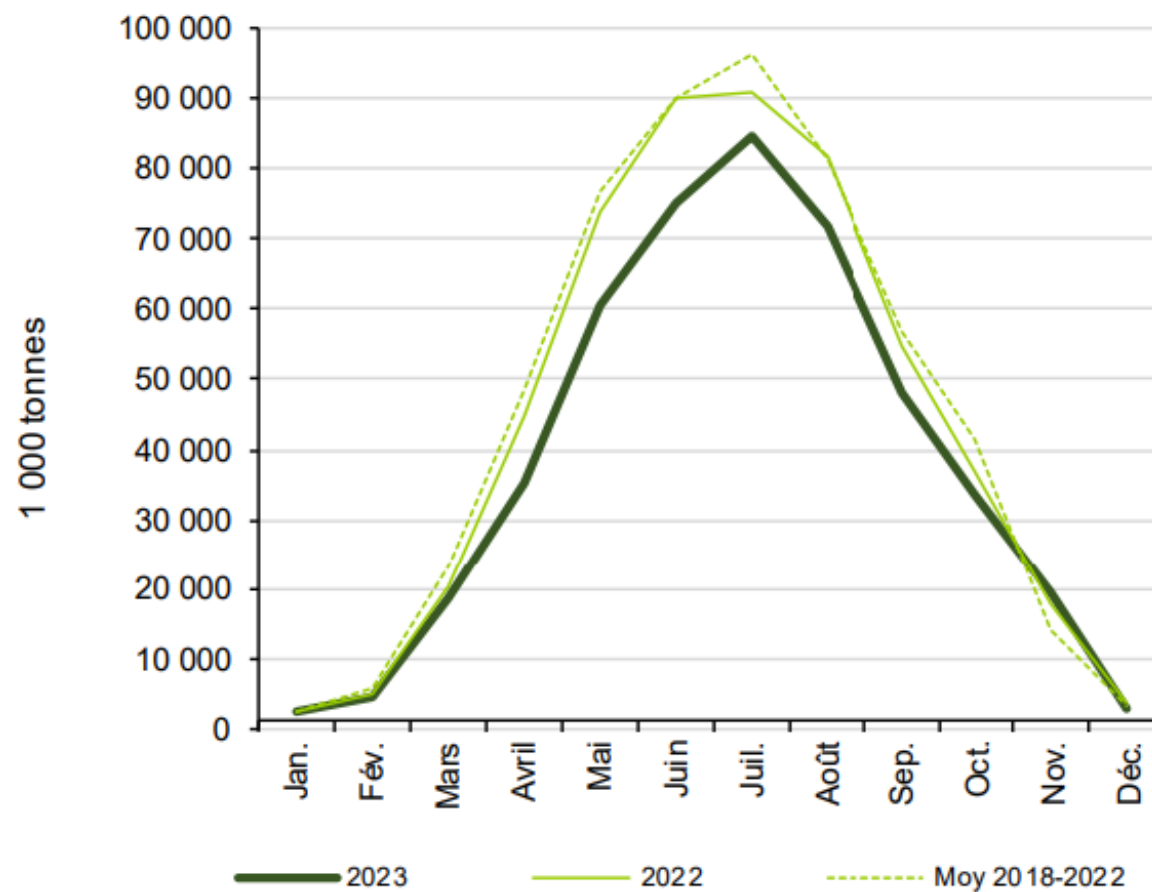
SUMMER PRODUCTION	2020	2021	2022	2023
Production fresh tomatoes (tonnes)	515 768	540 525	522 395	457 000 (estimation Agreste)
% organic	nd	nd	nd	nd
% non-organic	nd	nd	nd	nd
% greenhouse	91	94	94	93
% open field	9	6	6	7
%Round tomatoes	22	18	18	
%Vine tomatoes	40	39	37	
%Other tomatoes (cherry, mini-type...)	38	42	45	
% destined to national market	87	86	84	
% destined to exports EU	11	13	15	
% destined to exports non-EU	2	1	1	
Surface fresh tomatoes (ha)	2824	2668	2795	
% organic	18	28	22	
% non-organic	82	72	78	
% greenhouse	73	77	77	77
% open field	27	23	23	23
%Round tomatoes				
%Vine tomatoes				
%Other tomatoes (cherry, mini-type...)				
% destined to national market				
% destined to exports EU				
% destined to exports non-EU				

Production 2023

- Surfaces of fresh tomatoes are stable
- National production is decreasing
 - => Brittany's production is impacted by high energy costs
 - => A lack of light at the beginning of the season in the north of the country
 - => Cherry and ribbed tomatoes surfaces increase => lower yield

Production nationale de tomates

Une offre inférieure aux années précédentes



Source : Agreste

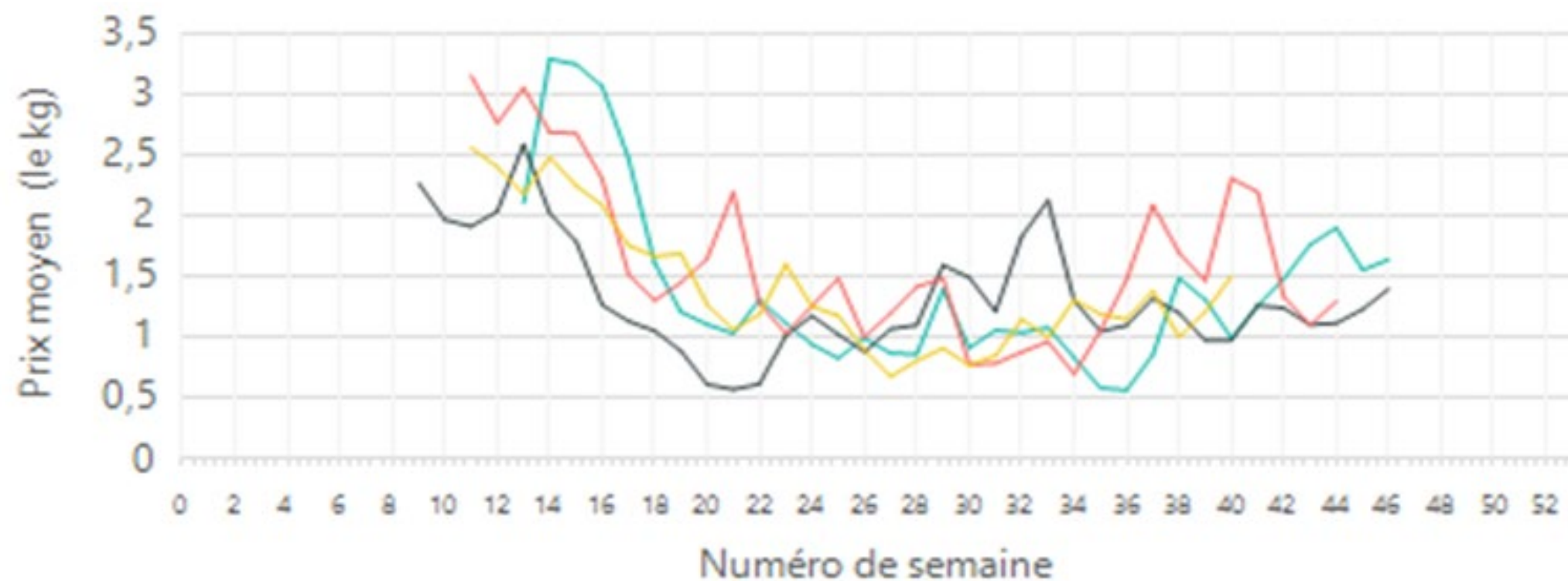
Observations 2023

- **Price levels for french products** that are too high in stores are observed
- In France, distributors make much more margin on french tomatoes than on imported products
- Persistence of the supply of **Maroccan products** on the stores: particularly first-price cherry tomatoes directly competing with the french supply

Prix Expédition

TOMATE ronde Bretagne grappe extra colis 10kg

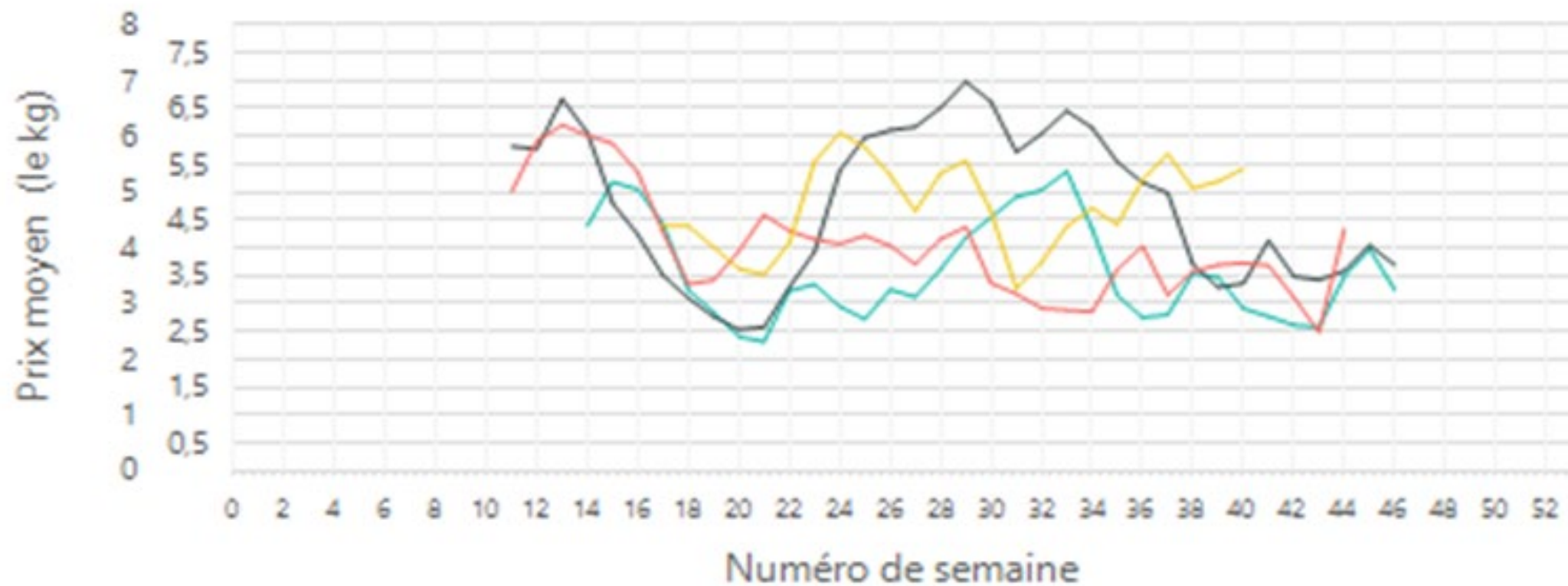
— 2020 — 2021 — 2022 — 2023



Prix Expédition

TOMATE cerise Bretagne extra barq.250g

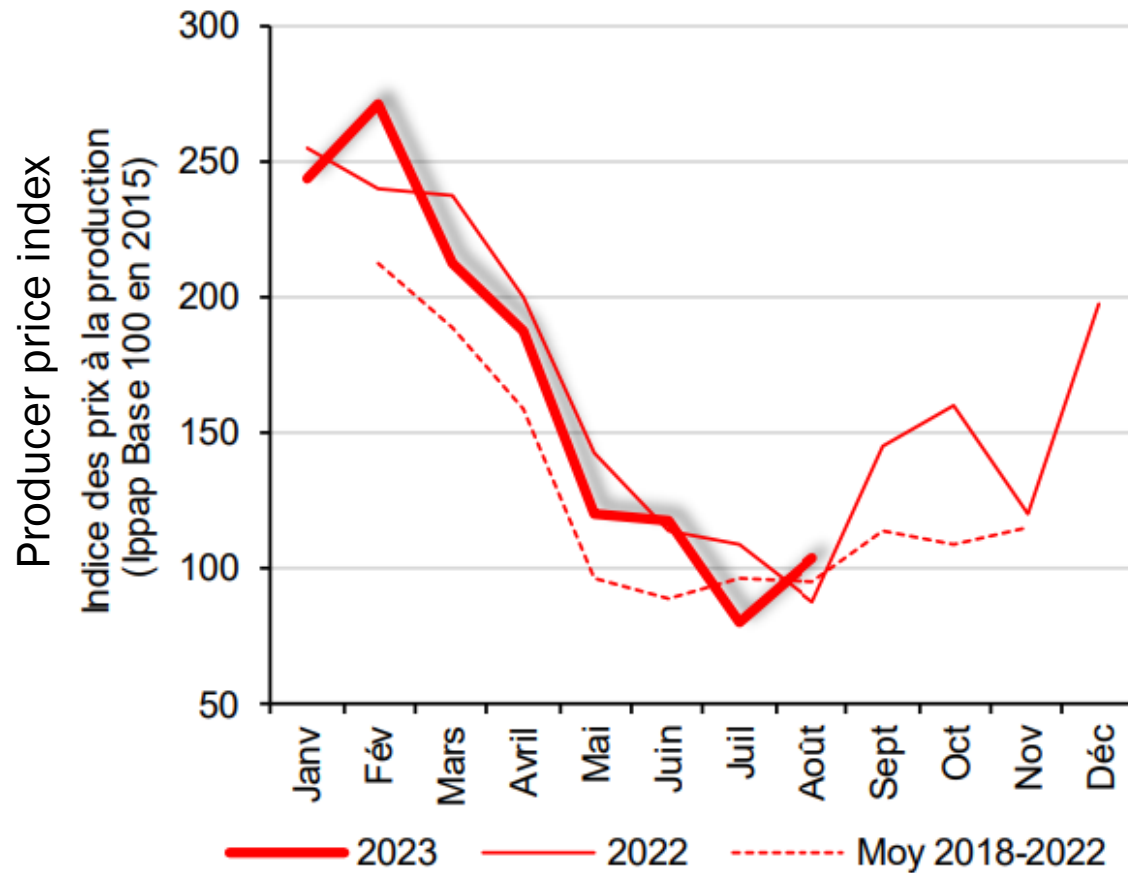
— 2020 — 2021 — 2022 — 2023



2- EVOLUTION OF CONSUMERS PREFERENCE AND CONSUMPTION

Prix des tomates à la production

Chute en juillet, reprise en août

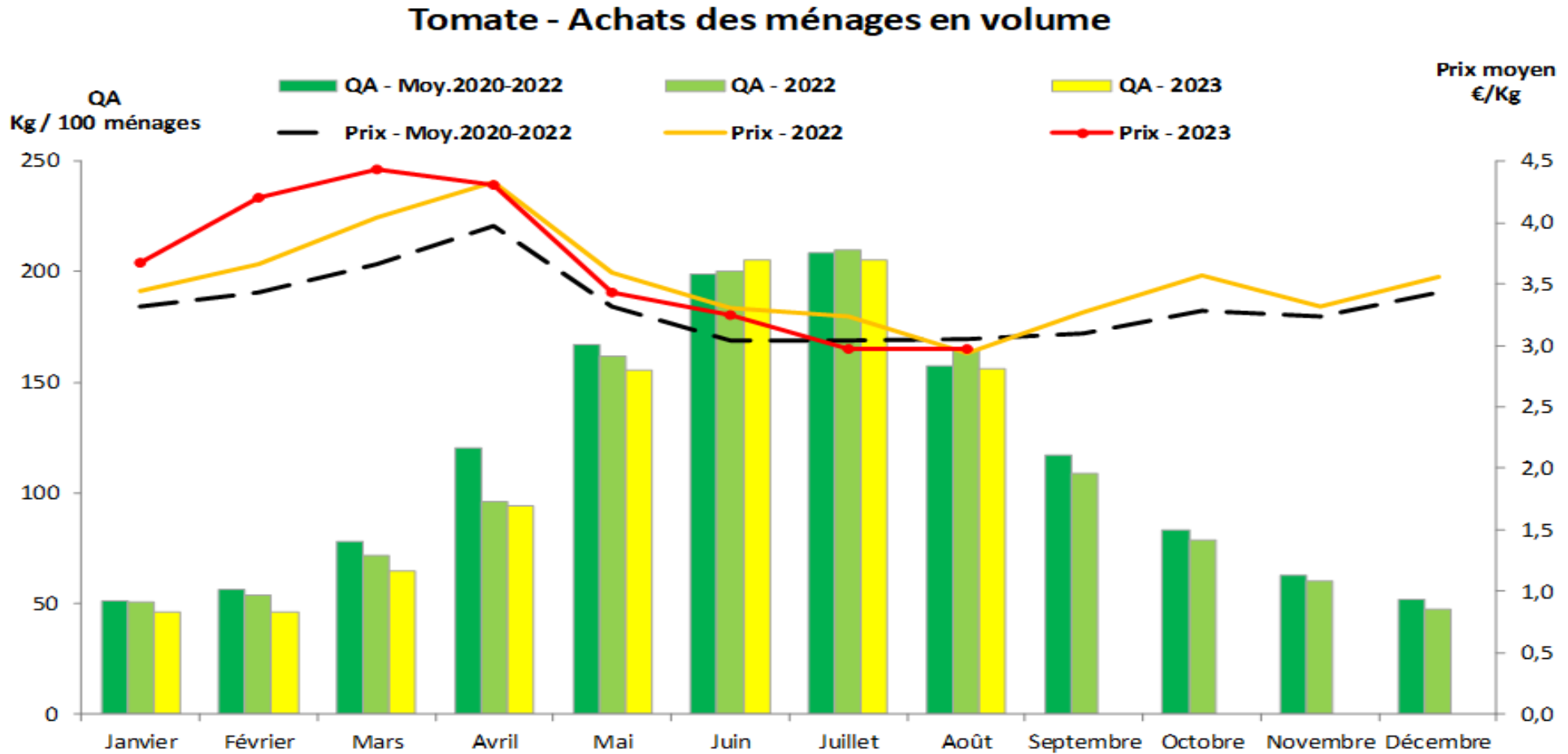


Source : Agreste-Insee

- From march to may, the consumption was too low, producer's prices are lower than in 2022,
- In June, there was an increase of consumption (better weather)
- In July, the bad weather had an impact on the demand and prices are 26% lower than in July 2022
- In August, the return of summer weather improved the consumption and prices

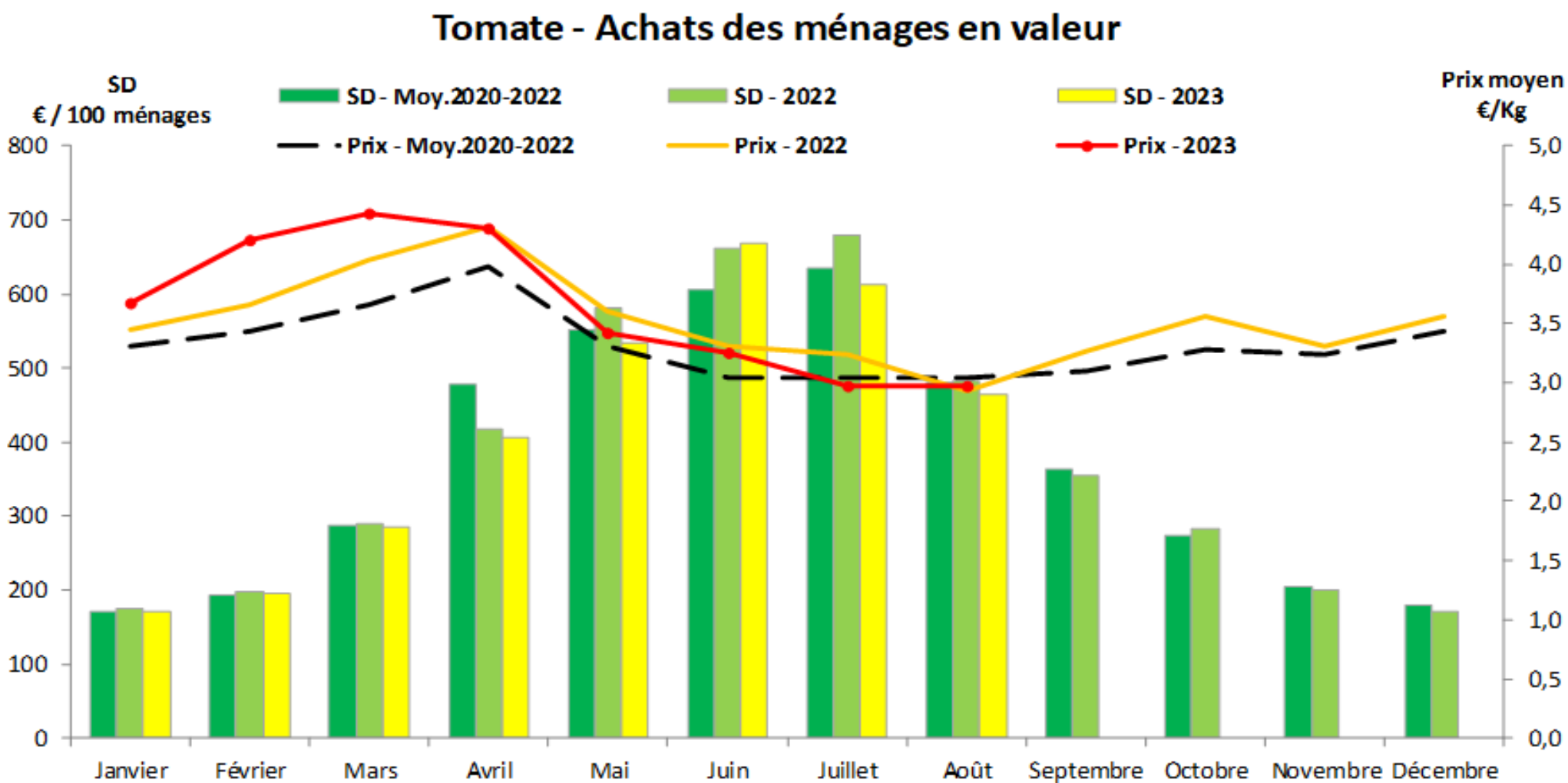
Quantities purchased

Average price



Amount spent

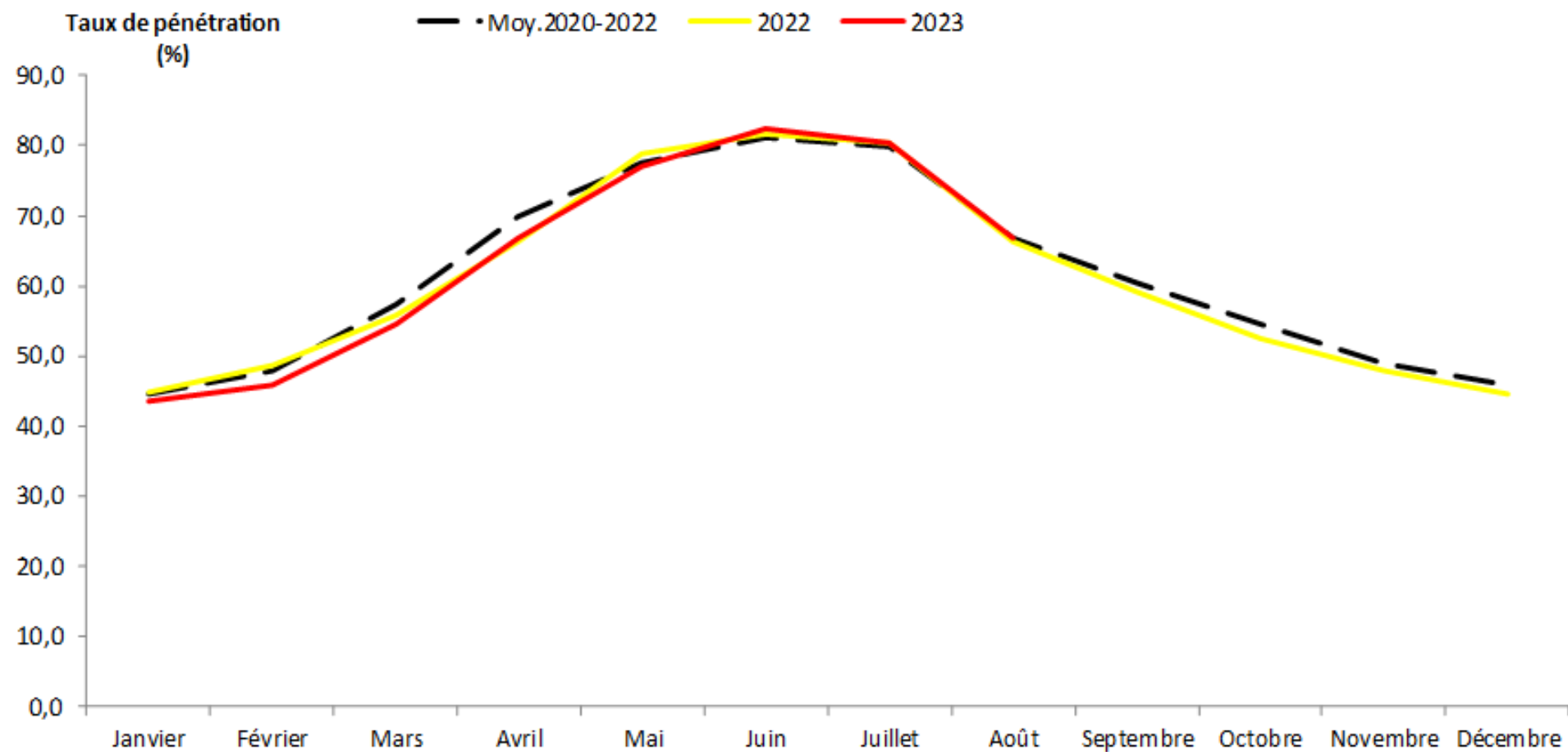
Average price



Source : Kantar ; Elaboration : CTIFL

Tomate - Taux de pénétration des ménages

% of buyer households



Source : Kantar ; Elaboration : CTIFL

January to August 2023

Quantity
purchased Amount
spent Average
price

Tomate - Cumul de janvier à août	QA/100	SD/100	Prix moyen
2020	1 050,4	3 320,0	3,16
2021	1 055,7	3 393,8	3,21
2022	1 009,5	3 486,5	3,45
2023	974,0	3 332,0	3,42
<i>Moy.2020-2022</i>	<i>1 038,6</i>	<i>3 400,1</i>	<i>3,27</i>
Evol/2022	-3,5%	-4,4%	-0,9%
Evol/moy.2020-2022	-6,2%	-2,0%	4,5%

Source : Kantar

Fewer quantities
purchased and less
expenses due to high
prices displayed in
stores at the
beginning of the
season and global
inflation

Trends on organic consumption april-june 2023

Evolution de la consommation de fruits et légumes frais bio sur la période avril-juin

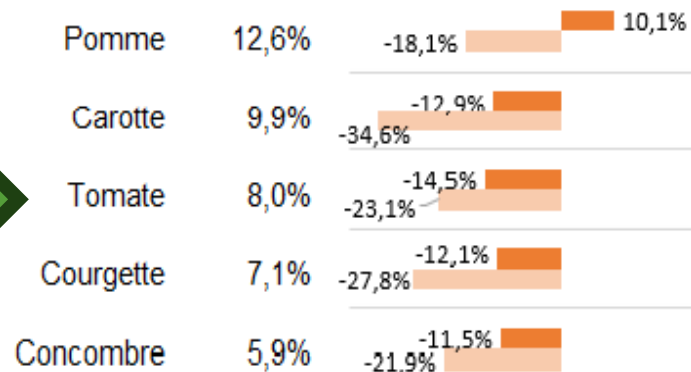
T2 2023

VOLUME

Evolution des achats volumes des principaux FL BIO au T2 2023

Pdm volume en % au T2 23

■ Evol / 22 ■ Evol / moy 3 ans

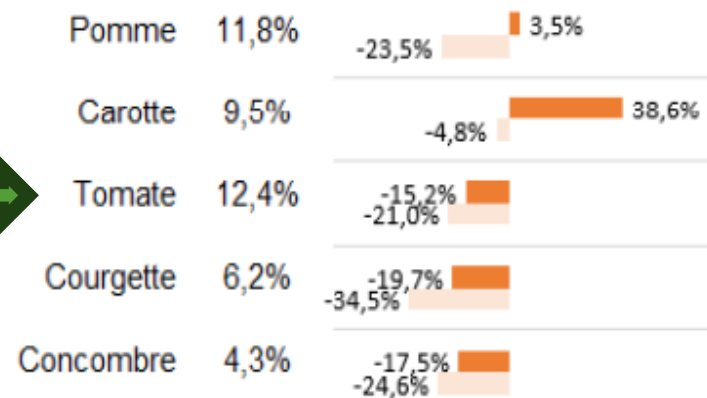


VALEUR

Evolution des achats valeur des principaux FL BIO au T2 2023

Pdm valeur en % au T2 23

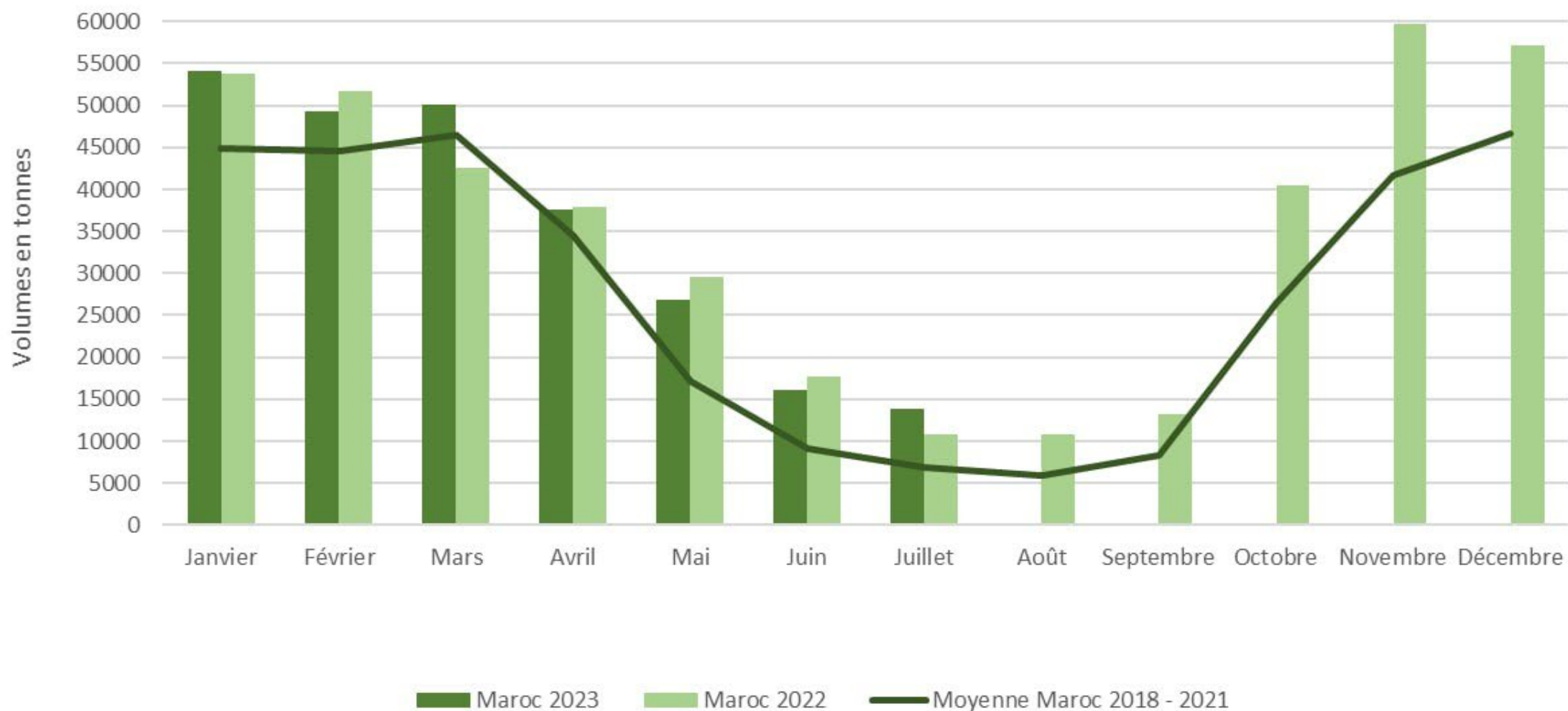
■ Evol / 22 ■ Evol / moy 3 ans



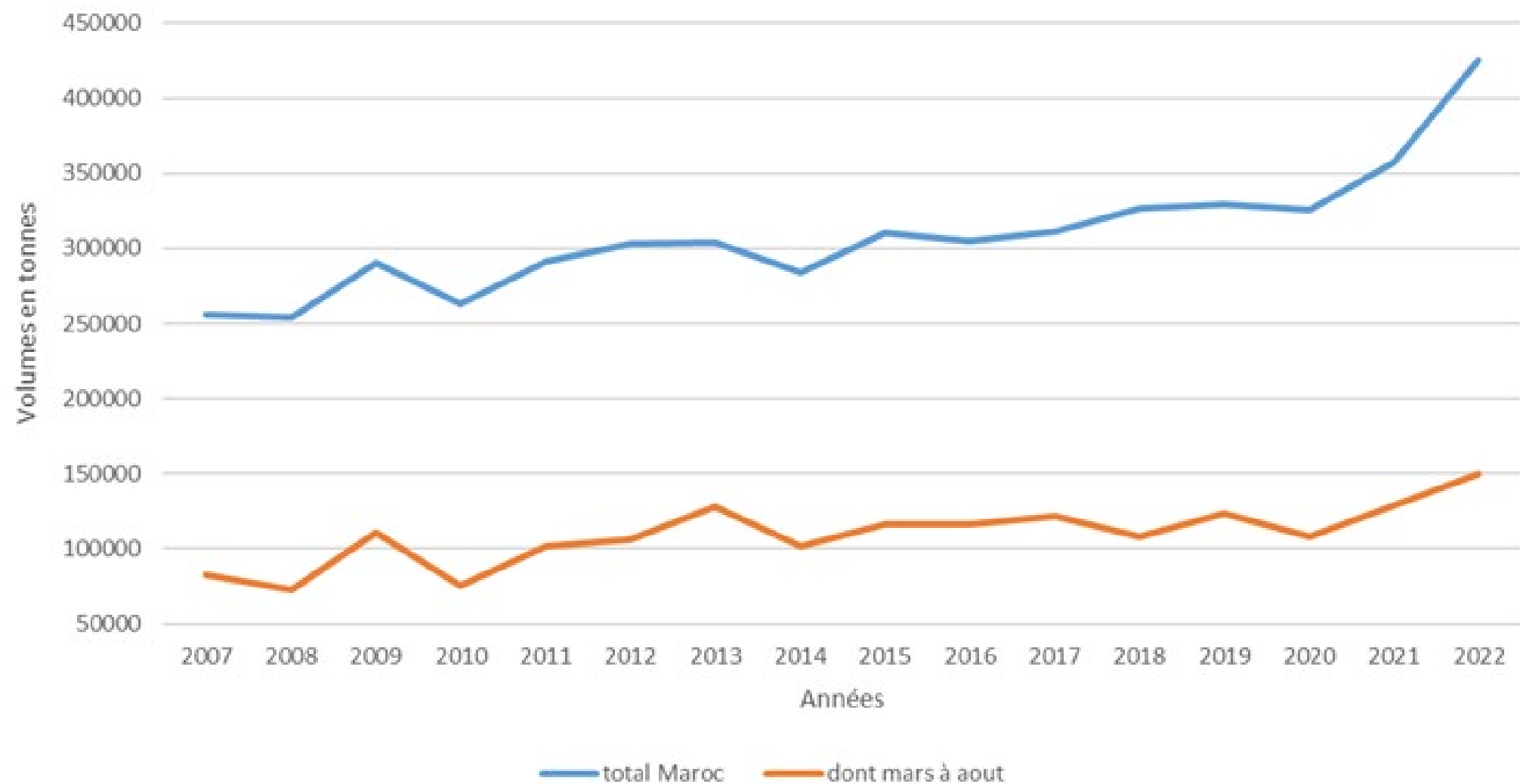
3- COMPETITIVENESS OF THE OTHER EXTRA-EU SUPPLIERS

Evolution mensuelle des importations françaises de tomates fraîches origine Maroc 2023/2022 (en tonnes)

Source : douanes françaises



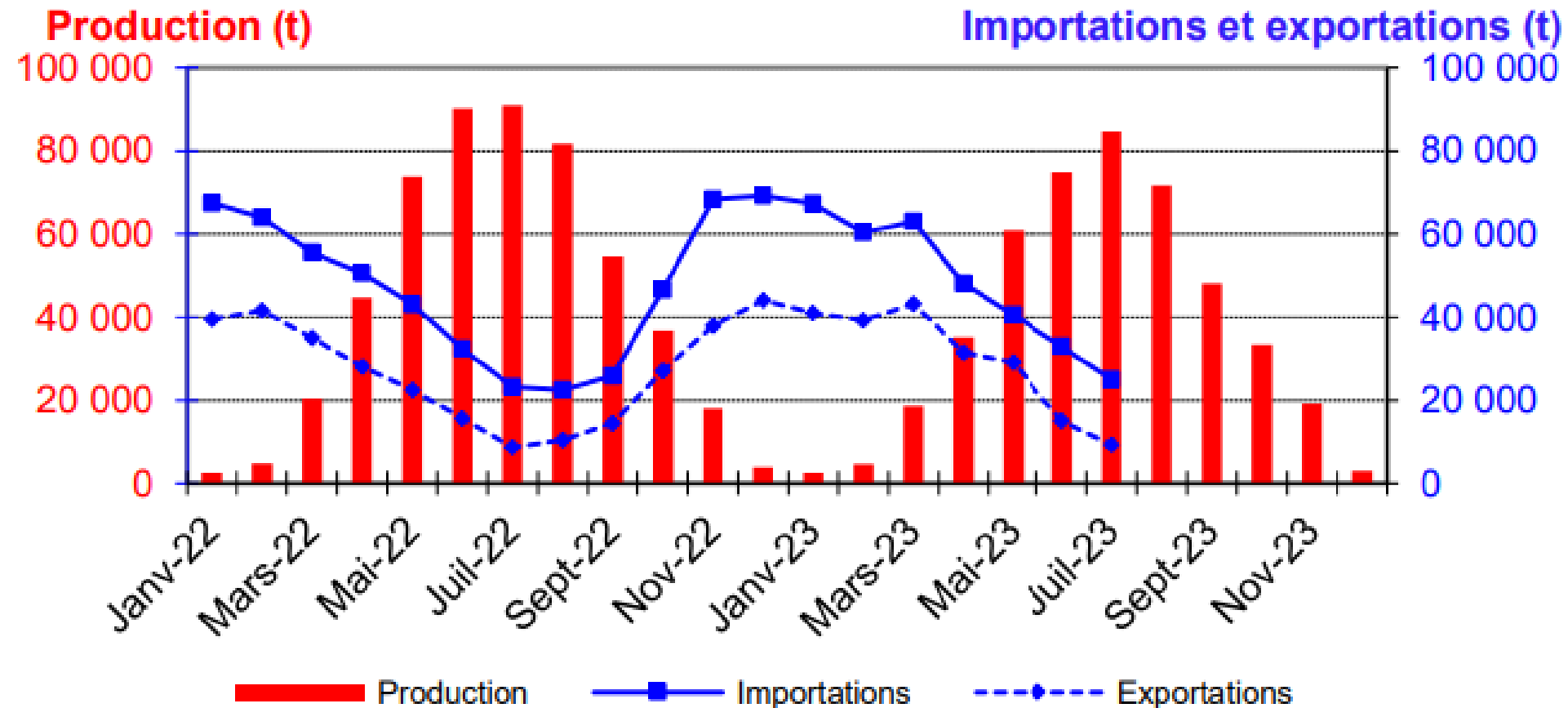
Import Tomates origine Maroc (Douanes françaises)



Production et commerce extérieur de tomates

Etabli au 01-Sep-2023

Années 2022 et 2023



Source : Douanes et estimations SSP

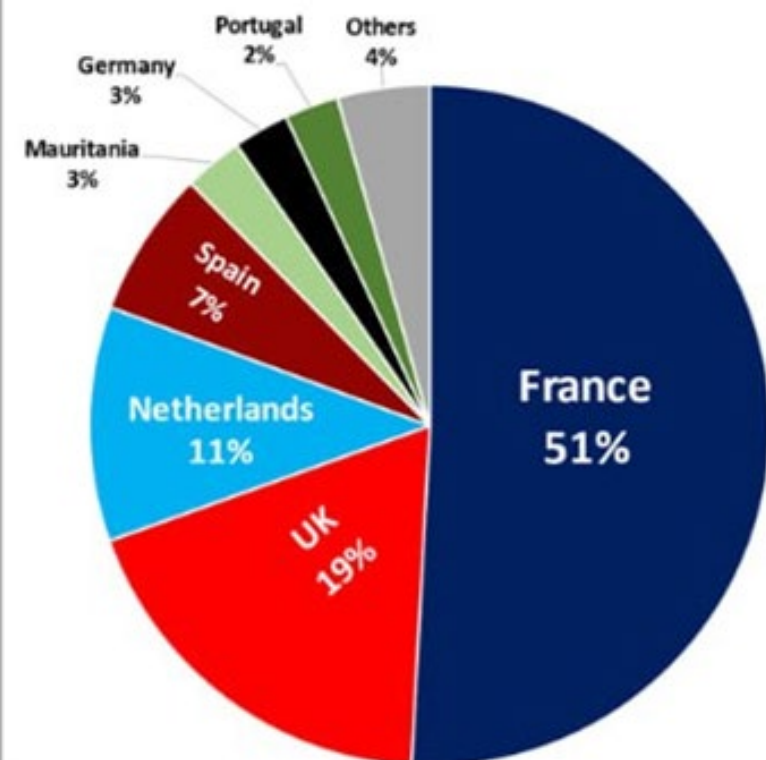
Commerce extérieur de la France entre janvier et juillet 2023

	Quantité (tonne)		
	Importations	Exportations	Solde
Monde	337 265	208 270	-128 995
U.E. à 28	82 933	198 411	115 479
Pays-Tiers	254 332	9 859	-244 473
Allemagne	37	73 722	73 685
Belgique	15 276	9 686	-5 590
Espagne	52 077	16 481	-35 596
Pays-Bas	8 482	40 496	32 014
Maroc	247 735	ND	-247 735

Etabli au 01-Sep-2023

Source : Douanes

EastFruit – Morocco: Tomato Exports in MY 2022/23, %



Data of Trade Data Monitor

Moroccan competition in french supermarkets

Exemple dans les supermarchés en France...



0,99 euros/250g

Barquette de tomates cerises allongées

« origine Maroc »



0,99 euros/200g

Barquette de tomates cerises rondes

« origine France »

94% of buyers consider the origin to be unidentifiable on AZURA packaging (study carried out in France in October 2022)

Our requests:

1/A study of the evolution of the European tomato market (fresh tomatoes only) over the last 10 years (considering european production and imports)

2/A revision of the European FIC (Food Information to Consumers) regulation for a more visible display of the indication of origin

1/A print of the flag of the producing country with a minimum height of 15 mm and/or written inscription of the origin with a character size of minimum 15 mm height.

2/The mention of the country of origin of the product affixed to the upper side of the packaging of the product (the side most visible on the shelf).

4- UPDATE ON THE TOMATO BROWN RUGOSE FRUIT VIRUS (ToBRFV)

out of the 7 cases, 6 came from the same producer of Dutch plants. That the sites are affected differently depend

ToBRFV

=>7 official cases in France (6 came from the same Dutch producer of plants)

Sites are affected differently depending on the type of tomato (certain varieties do not express symptoms while others are very seriously affected)

- National protocol update with prophylaxis measures for producers, Research into early detection methods
- Work with the GSPP consultancy on measures for seeds, plant producers and vegetables producers

Regarding ToBRFV-free seeds, despite the tests carried out by seed companies: no certainty of having free seeds