



TomatoEurope

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**Market Observatory Group
Subgroup on Tomatoes
Friday, October 9, 2020**

***Tomatoes for Processing
Preliminary production estimates
crop 2020***

Compared to forecasts, which predicted stability, production dropped, due to climatic problems, particularly in the Iberian Peninsula

EU Processing tomatoes

Preliminary production estimates - Crop 2020

(x .000 tons)

(highlighted in yellow are members of Tomato Europe)

	Average 2015/2019	2019 FINAL	FORECAST 2020	ESTIMATION FINAL 2020	VARIATION 2020 vs 2019	VARIATION 2020 vs average 2015/2019
Italy	5.114	4.801	5.000	5.100	6,2%	-0,3%
Spain	3.200	3.200	3.100	2.700	-15,6%	-15,6%
Portugal	1.511	1.410	1.300	1.200	-14,9%	-20,6%
Greece	412	400	420	430	7,5%	4,4%
France	183	154	155	145	-5,8%	-20,9%
TOMATO EUROPE	10.421	9.965	9.975	9.575	-3,9%	-8,1%
Malta	8	8	8	8	0,0%	-2,4%
Bulgaria	48	40	40	40	0,0%	-16,7%
Czech Republic	25	25	25	25	0,0%	0,0%
Hungary	102	100	100	80	-20,0%	-21,6%
Poland	201	175	175	175	0,0%	-12,9%
Slovakia	20	20	20	20	0,0%	0,0%
Croatia	10	10	10	10	0,0%	0,0%
Total EU	10.835	10.343	10.353	9.933	-4,0%	-8,3%
Iberian peninsula	4.711	4.610	4.400	3.900		
<i>%european production</i>	43,5%	44,6%	42,5%	39,3%		



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2020 world production of tomatoes for processing (in 1000 metric tonnes)

Estimate at September 30, 2020

Major producing countries and total world production (forecast 2020 x.000 tons)

	Average 2015/2019	2019 FINAL	ESTIMATION FINAL 2020	VARIATION 2020 vs 2019	VARIAZIONE 2020 vs average 2015/2019
California	10.216	10.144	10.342	2,0%	1,2%
Italy	5.114	4.801	5.100	6,2%	-0,3%
China	5.565	4.600	5.500	19,6%	-1,2%
Spain	3.200	3.200	2.700	-15,6%	-15,6%
Turkey	2.020	2.200	2.500	13,6%	23,8%
Iran	1.165	1.650	1.300	-21,2%	11,6%
Portugal	1.511	1.410	1.200	-14,9%	-20,6%
Brazil	1.400	1.200	1.180	-1,7%	-15,7%
Chile	1.000	1.100	907	-17,5%	-9,3%
Tunisia	678	807	961	19,1%	41,8%
Algeria	625	800	1.000	25,0%	60,0%
Ukraine	634	720	800	11,1%	26,2%
Russia	355	552	550	-0,4%	55,1%
Canada	437	434	426	-1,8%	-2,4%
Egypt	320	400	420	5,0%	31,3%
Greece	412	400	430	7,5%	4,4%
Argentina	445	395	454	14,9%	2,1%
USA excluding California	421	370	450	21,6%	6,9%
Others	2.300	2.192	2.062	-5,9%	-10,4%
WORLD	37.823	37.375	38.282	2,4%	1,2%

While Europe drops by 4,0% compared to 2019, the other producing countries increase by 4,9% on average.

Europe is losing weight in the world production of processing tomatoes, even if production is substantially stable

Europe vs World

	Average 2015/2019	2019 FINAL	ESTIMATION FINAL 2020	VARIATION 2020 vs 2019	VARIATION 2020 vs average 2015- 2019
European Union	10.753	10.343	9.933	-4,0%	-7,6%
Other Countries	27.252	27.032	28.349	4,9%	4,0%
GENERAL TOTAL	37.823	37.375	38.282	2,4%	1,2%
% UE	28,4%	27,7%	25,9%		



Stabilization of production should keep stocks of finished products low and thus maintain market equilibrium.

However, the effect of the COVID-19 emergency is not clear and for this reason the attempt by TomatoEurope to calculate the real outputs of processed tomatoes in these 6 months is important.

The first data in our possession* (we are completing the data collection in respect of privacy) indicate a stock level of approx

32,3%

of the five-year average of processed tomatoes and therefore lower than the normal requirement.

****We will have more complete data by the end of October***



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Product	Fresh Tomato Equivalent
Tomato Juice	1,05
Diced tomatoes 6/7 Brix	1,45
Peeled Tomatoes 6/7 Brix	1,45
Tomato Puree 7 Brix	1,60
Tomato Puree 8 Brix	1,80
Tomato Puree 9 Brix	2,00
Tomato Puree 10 Brix	2,20
Tomato Paste 12/14 Brix	2,70
Tomato Paste 14/16 Brix	3,10
Tomato Paste 16/18 Brix	3,50
Tomato Paste 18/20 Brix	3,90
Tomato Paste 20/22 Brix	4,30
Tomato Paste 22/24 Brix	4,70
Tomato Paste 24/26 Brix	5,10
Tomato Paste 26/28 Brix	5,50
Tomato Paste 28/30 Brix	5,90
Tomato Paste 30/32 Brix	6,30
Tomato Paste 32/34 Brix	6,70
Tomato Paste 36/38 Brix	7,50
Tomato Powder	20,00



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Information possible with the data of stocks

**1) Annual tomato disappearance from industry
(first estimate)**

$$\begin{aligned} &\text{Stock as of June 1}^{\text{st}} + \\ &\quad \text{Production} - \\ &\text{Stock as of December 1}^{\text{st}} = \\ &\quad \text{-----} \\ &\text{Six-monthly issue (estimate)} \\ &\quad \times 2 = \\ &\text{Annual Disappearance} \end{aligned}$$



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Possible information

2) Calculation of internal consumption

$$\frac{\text{12 month Disappearance-
Balance Export / Import}}{\text{Estimated internal consumption}}$$

**The difficulty of calculating the export / import
balance (net of inward processing)
In fresh tomato equivalent**

CODE CN	Short Description	Conversion Coefficient (current)	Review (general)		Review (Manuel)	Counter-argument Guido	fxb
07129030	Dried Tomatoes (powder)	19,50	20,00	(1)			
20021010	Peeled tomatoes (Others)	1,13	1,15	(2)	1,15		
	Peeled tomatoes (Whole)		1,15	(2)	1,15		
20021090	Unpeeled tomates	1,13	1,15	(2)	1,15		
20029011	Tomatoes with dry matters < 12% and packaging >1 kg	1,30	2,45	(3)	2,45		
20029019	Tomatoes with dry matters < 12% and packaging < =1 kg (glass)	1,30	1,40	(4)	1,63	2,00	2,00
20029019	Tomatoes with dry matters < 12% and packaging < =1 kg (Brik)	1,30	1,40	(4)	1,40		
20029031	Tomatoes with dry matters 12-30% and packaging >1 kg	5,44	5,90	(5)	2,85	???	4,50
20029039	Tomatoes with dry matters 12-30% and packaging < =1 kg	5,44	5,00	(6)	5,00		
20029091	Tomatoes with dry matters > 30% and packaging >1 kg	8,50	7,50	(7)	6,70	7,00	7,00
20029099	Tomatoes with dry matters > 30% and packaging < =1 kg	8,50	7,00	(8)	7,00		
20095010	Tomato Juice < 7% with sugar	1,20	1,05		1,05		
20095090	Tomato Juice < 7%	1,20	1,05		1,05		
21032000	Ketchup and other sauces	1,30	1,50	(9)	1,50		



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Possible informations

3) Planning of national productions

**Estimated annual disappearance \pm
stock variation * =**

Planning production

*** compared to physiological stocks (estimated 4 months of requirement from 1 June)**



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**Theoretical simulation
Estimation of internal consumption
and production planning**

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Theoretical simulation

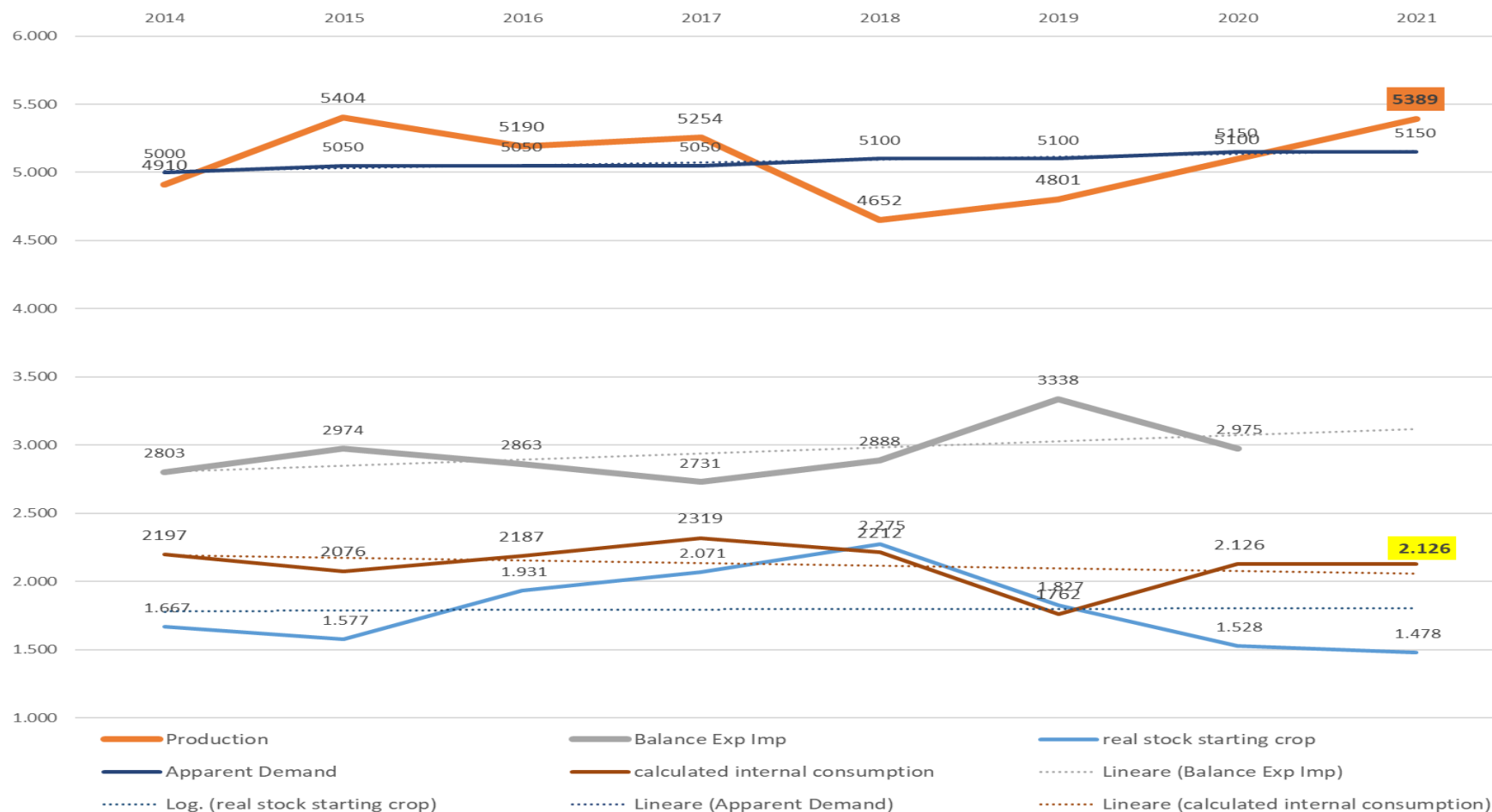
**Estimation of internal consumption
and production planning**

Calculated data: Apparent Demand = Annual Disappearance									
Crop	Production	Balance Exp Imp	Stock variation	real stock starting crop	physiological stocks	Apparent Demand	calculated internal consumption	Import	Export
2014	4910	2803	-90	1.667	1.667	5000	2197	1100	3903
2015	5404	2974	354	1.577	1.683	5050	2076	981	3955
2016	5190	2863	140	1.931	1.683	5050	2187	1069	3932
2017	5254	2731	204	2.071	1.683	5050	2319	1354	4085
2018	4652	2888	-448	2.275	1.700	5100	2212	1235	4123
2019	4801	3338	-299	1.827	1.700	5100	1762	970	4308
2020	5100	2.975	-50	1.528	1.717	5150	2.126		
2021	5389			1.478	1.717	5150	2.126		

* calculating 4 months of needs

	Real Data								
	Calculated Data								
	Simulated Data								
	Planning production								

ITALY - PROCESSING TOMATOES
APPARENT DEMAND, INTERNAL CONSUMPTION, PLANNING PRODUCTION
(expressed in fresh tomato equivalent x .000 ton)





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Thanks for your attention