



**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
<b>Italy</b>	5.114	4.801	5.000	5.100	6,2%	-0,3%
<b>Spain</b>	3.200	3.200	3.100	2.700	-15,6%	-15,6%
<b>Portugal</b>	1.511	1.410	1.300	1.200	-14,9%	-20,6%
<b>Greece</b>	412	400	420	430	7,5%	4,4%
<b>France</b>	183	154	155	145	-5,8%	-20,9%
<b>TOMATO EUROPE</b>	<b>10.421</b>	<b>9.965</b>	<b>9.975</b>	<b>9.575</b>	<b>-3,9%</b>	<b>-8,1%</b>
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%
<b>Total EU</b>	<b>10.835</b>	<b>10.343</b>	<b>10.353</b>	<b>9.933</b>	<b>-4,0%</b>	<b>-8,3%</b>
<b>Iberian peninsula</b>	<b>4.711</b>	<b>4.610</b>	<b>4.400</b>	<b>3.900</b>		
<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
<b>California</b>	<b>10.216</b>	<b>10.144</b>	<b>10.342</b>	<b>2,0%</b>	<b>1,2%</b>
<b>Italy</b>	<b>5.114</b>	<b>4.801</b>	<b>5.100</b>	<b>6,2%</b>	<b>-0,3%</b>
<b>China</b>	<b>5.565</b>	<b>4.600</b>	<b>5.500</b>	<b>19,6%</b>	<b>-1,2%</b>
<b>Spain</b>	<b>3.200</b>	<b>3.200</b>	<b>2.700</b>	<b>-15,6%</b>	<b>-15,6%</b>
<b>Turkey</b>	<b>2.020</b>	<b>2.200</b>	<b>2.500</b>	<b>13,6%</b>	<b>23,8%</b>
<b>Iran</b>	<b>1.165</b>	<b>1.650</b>	<b>1.300</b>	<b>-21,2%</b>	<b>11,6%</b>
<b>Portugal</b>	<b>1.511</b>	<b>1.410</b>	<b>1.200</b>	<b>-14,9%</b>	<b>-20,6%</b>
<b>Brazil</b>	<b>1.400</b>	<b>1.200</b>	<b>1.180</b>	<b>-1,7%</b>	<b>-15,7%</b>
<b>Chile</b>	<b>1.000</b>	<b>1.100</b>	<b>907</b>	<b>-17,5%</b>	<b>-9,3%</b>
<b>Tunisia</b>	<b>678</b>	<b>807</b>	<b>961</b>	<b>19,1%</b>	<b>41,8%</b>
<b>Algeria</b>	<b>625</b>	<b>800</b>	<b>1.000</b>	<b>25,0%</b>	<b>60,0%</b>
<b>Ukraine</b>	<b>634</b>	<b>720</b>	<b>800</b>	<b>11,1%</b>	<b>26,2%</b>
<b>Russia</b>	<b>355</b>	<b>552</b>	<b>550</b>	<b>-0,4%</b>	<b>55,1%</b>
<b>Canada</b>	<b>437</b>	<b>434</b>	<b>426</b>	<b>-1,8%</b>	<b>-2,4%</b>
<b>Egypt</b>	<b>320</b>	<b>400</b>	<b>420</b>	<b>5,0%</b>	<b>31,3%</b>
<b>Greece</b>	<b>412</b>	<b>400</b>	<b>430</b>	<b>7,5%</b>	<b>4,4%</b>
<b>Argentina</b>	<b>445</b>	<b>395</b>	<b>454</b>	<b>14,9%</b>	<b>2,1%</b>
<b>USA excluding California</b>	<b>421</b>	<b>370</b>	<b>450</b>	<b>21,6%</b>	<b>6,9%</b>
<b>Others</b>	<b>2.300</b>	<b>2.192</b>	<b>2.062</b>	<b>-5,9%</b>	<b>-10,4%</b>
<b>WORLD</b>	<b>37.823</b>	<b>37.375</b>	<b>38.282</b>	<b>2,4%</b>	<b>1,2%</b>



**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
<b>European Union</b>	10.753	<b>10.343</b>	<b>9.933</b>	<b>-4,0%</b>	<b>-7,6%</b>
<b>Other Countries</b>	27.252	<b>27.032</b>	<b>28.349</b>	<b>4,9%</b>	<b>4,0%</b>
<b>GENERAL TOTAL</b>	37.823	<b>37.375</b>	<b>38.282</b>	<b>2,4%</b>	<b>1,2%</b>
<b>% UE</b>	<b>28,4%</b>	<b>27,7%</b>	<b>25,9%</b>		



**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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<b>Product</b>	<b>Fresh Tomato Equivalent</b>
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)**

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



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**Possible information**

**2) Calculation of internal consumption**

**12 month Disappearance-  
Balance Export / Import =**

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**Estimated internal consumption**



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**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 \* =**

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**Planning production**

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



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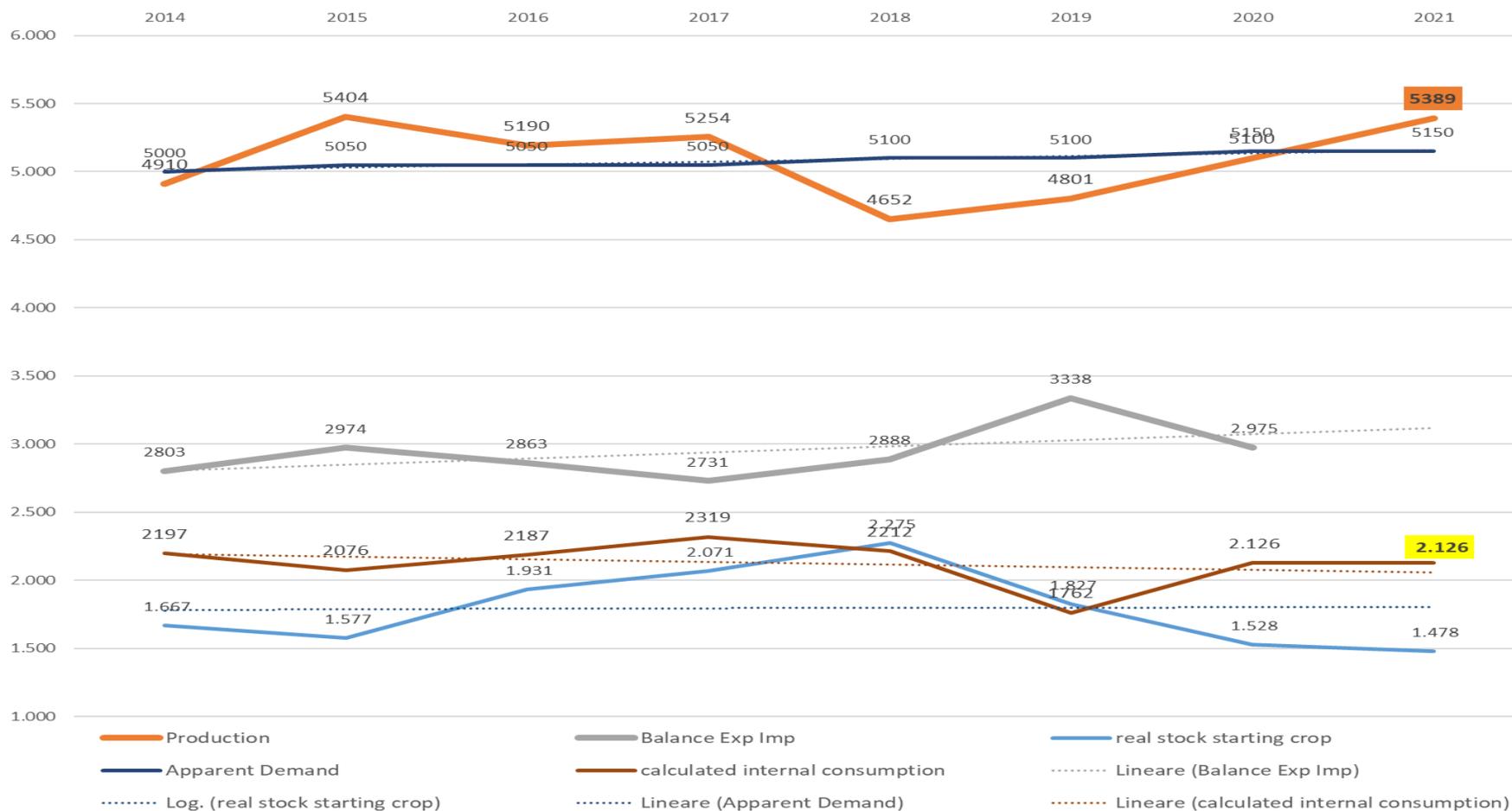
**ITALY**

**Theoretical simulation**

**Estimation of internal consumption  
and production planning**



**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**