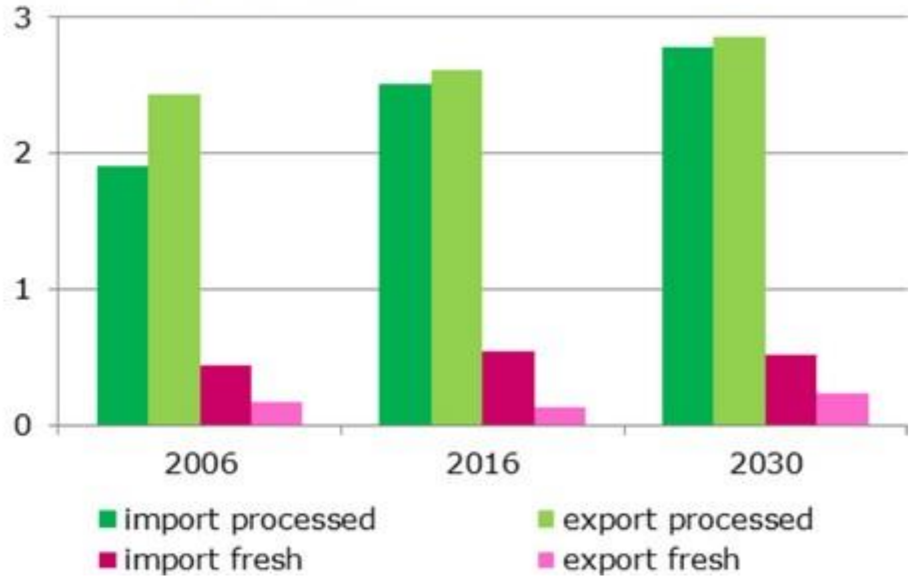
EU tomato production stable with higher value expected

EU production of fresh tomatoes is expected to remain relatively stable despite increasing yields driven by longer production seasons. However, the value of production is likely to continue to rise as greater product segmentation adds value. Consumption of fresh tomatoes is expected to go down slightly. By contrast, consumption of processed tomatoes is expected to marginally grow, driven by higher demand as an ingredient and for food products that evoke a Mediterranean lifestyle.

The EU produced more than 18 million t of tomatoes in 2016/2017, out of which approximately 40% is consumed fresh and 60% is used in the processing industry. These are separate production streams. Five Member States (Spain, Italy, the Netherlands, Poland and France) accounted for almost 75% of production for fresh consumption, while three Member States (Spain, Italy and Portugal) accounted for 94% of production for processing.

Graph 5.8 EU trade of fresh and processed tomatoes (in million t)



EU production of fresh tomatoes is expected to remain relatively stable compared to the average for 2014-2016 (-1.4 % by 2030), though with an increasing share of varieties with higher value added such as cocktail tomatoes, cherry tomatoes and other miniature tomatoes. Similarly, in the last decade the stability of production volumes has been accompanied by a growing value of production: close to +20 % in France, Germany, Italy and Spain in the period 2006- 2016 (figures based on Euromonitor). Fresh tomatoes can be produced in greenhouses or in open air, the latter method being mainly used in the southern countries.

While the production area is expected to decrease, the average yields of fresh tomatoes are increasing, driven by an extension of production seasons in all regions of production. The traditional summer campaign in the northern producing countries is being extended to winter and the traditional winter campaign in the southern countries is being extended to summer.

The increasing share of high added value varieties, e.g. miniature tomatoes, in total fresh tomato production is pushing down the average yield. However, the impact of longer production seasons on average yield is expected to be stronger. The extension of the seasons might have an impact on sustainability challenges in the sector, such as increased energy demand in the northern countries and increased use of water in the southern countries.

Domestic per capita consumption of fresh tomatoes remained stable at 15 kg per capita in the last decade (between 2006 and the 2014-2016 average). By 2030 it is expected to decline slightly to 14.4 kg (-0.3 % per year compared to 2014-2016).

In contrast to the declining exports in the last decade (-0.3 % per year in volume between 2006 and 2014- 2016), mainly due to the Russian import ban introduced in 2014, exports are expected to increase up to 2030 (+2.4 % compared to the 2014-2016 average). With stable imports, in particular from Morocco and Turkey (72 % and 18 % respectively in 2016), the EU will remain a net importer of fresh tomatoes.

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