



SHORT-TERM OUTLOOK

for EU agricultural markets
in 2021



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While all efforts are made to provide sound market and income projections, uncertainties remain.

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TOMATOES

STRONG INCREASE IN PROCESSED TOMATOES CONSUMPTION

The EU production of tomatoes is expected to increase by 5% in 2021. This growth is driven by the production of tomatoes for processing (+9%). Strong demand and low stocks (after last year's strong demand) push production up in all main producing countries: IT (+5%), ES (+17%) and PT (+11%).

Apparent per capita consumption of processed tomatoes is expected to increase by 4 kg (to 21.2kg) driven by a strong demand for tomato paste and peeled tomatoes. The strong demand for processed tomatoes last year has resulted in low stocks.

On the other hand, the EU production of fresh tomatoes may decrease by 2% in 2021 (-5.2%/5-year average), driven by a decline in ES (-10%), the largest EU producer, and in FR (-2%). In ES, producers switch to more profitable vegetables.

Per capita consumption of fresh tomatoes (14.7 kg) is expected to remain stable thanks to the high level of home consumption, in particular of smaller-sized tomatoes, and the re-opening of food services. It is still 1 kg below the record consumption level in 2016.

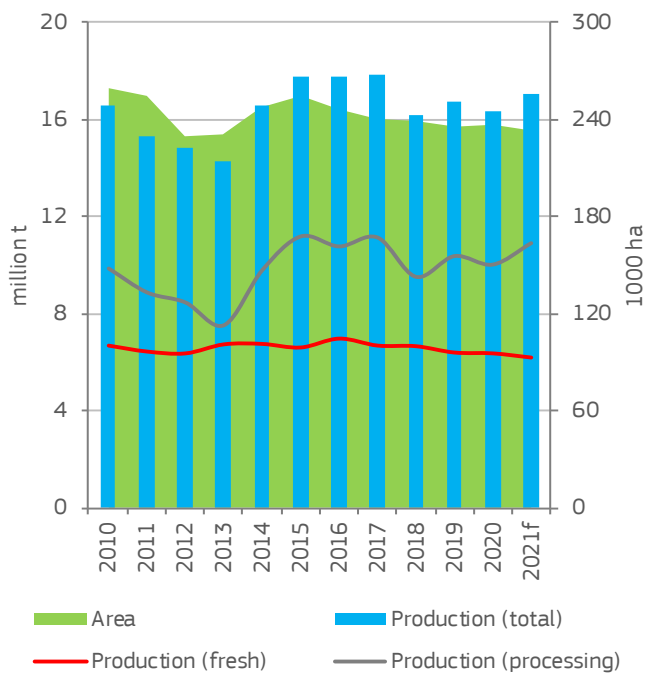
RECORD LOW EXPORT OF FRESH TOMATOES CONTINUES THE DECLINING TREND

EU imports of fresh tomatoes are expected to continue to increase in 2021 (+7%/2020) while exports are expected to decrease (-21%). Morocco remains by far the largest source of imports (70% in 2020). Whereas imports from Turkey (17%) were in Jan-April 2021 36% above imports in the same period last year, imports from Morocco were stable.

EU exports of fresh tomatoes, declining since 2013, are expected to further decline in 2021 and reach a record low level of 350 000 t (-21%/2020). The sharp drop is driven by a decline of exports to the UK (-37% in Jan-April 2021 compared to the same period last year), the largest EU export market (52%).

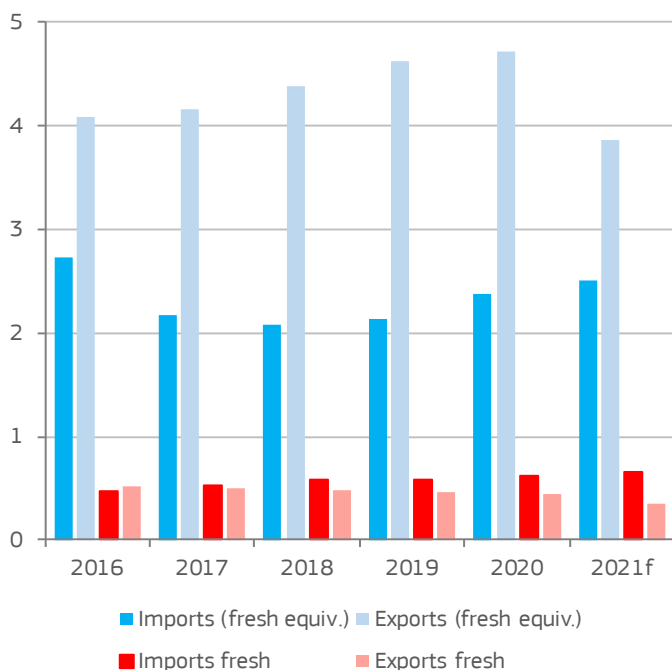
Driven by the high demand for processed tomatoes and low stocks, EU imports of tomatoes for processing are forecast to continue growing (+5%/2020). The main countries of origin are China, US and Ukraine. Although the export of tomatoes for processing continuously increased between 2013-2020 a decrease of 18% is forecast in 2021 (-12%/5-year average).

EU tomatoes production and area



Source: DG Agriculture and Rural Development, based on Eurostat.

EU trade of tomatoes (million t)



Source: DG Agriculture and Rural Development, based on Eurostat.



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