



ANICAV

Associazione Nazionale Industriali
Conservas Alimentari Vegetali



4 December 2024

The Tomato News Conference

FOCUS ON ITALY

- Marco Serafini -

- 1. Production**
2. Prices
3. Trade
4. Challenges

(.000 t)

48.000

46.000

44.000

42.000

40.000

38.000

36.000

34.000

32.000

30.000

2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

45.785

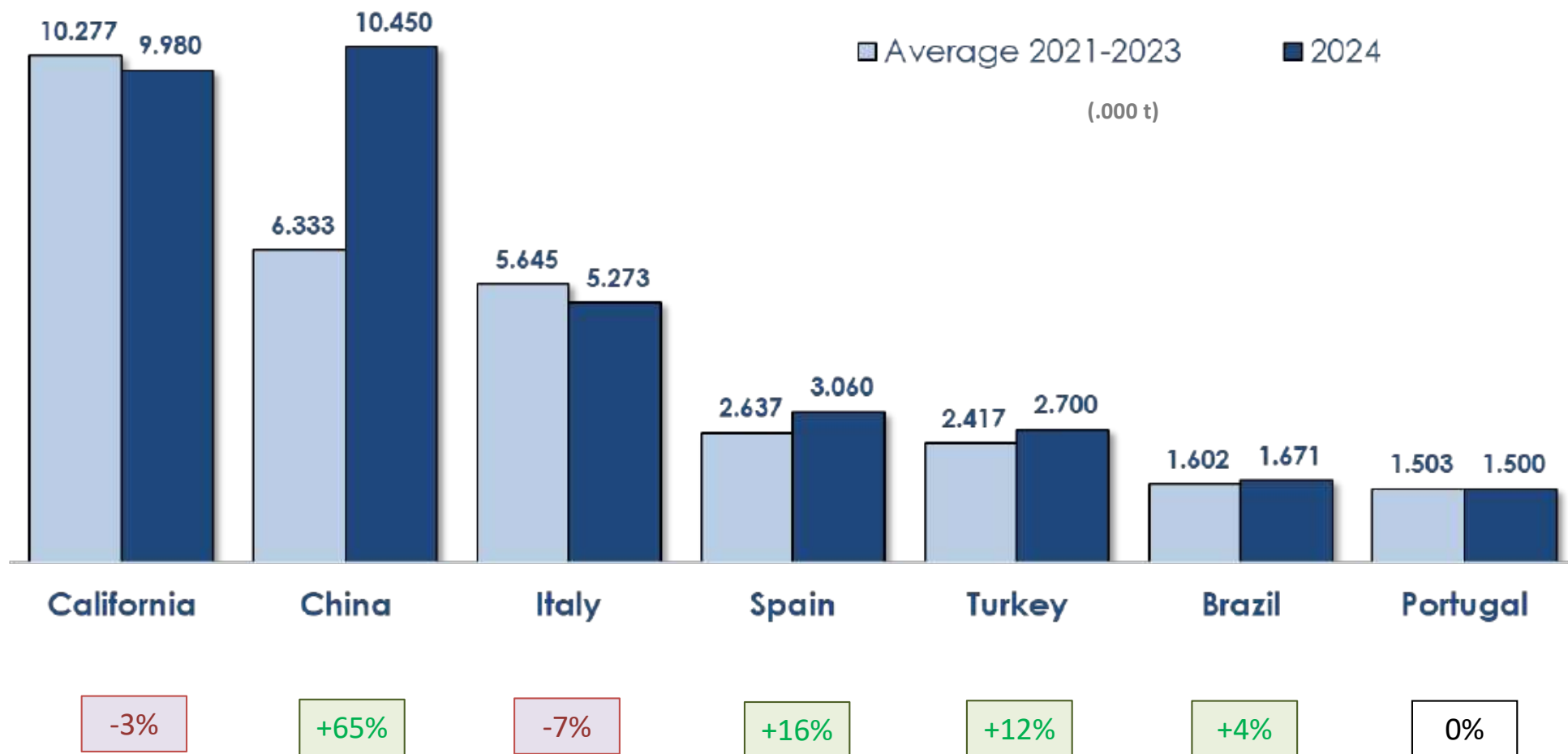
44.416

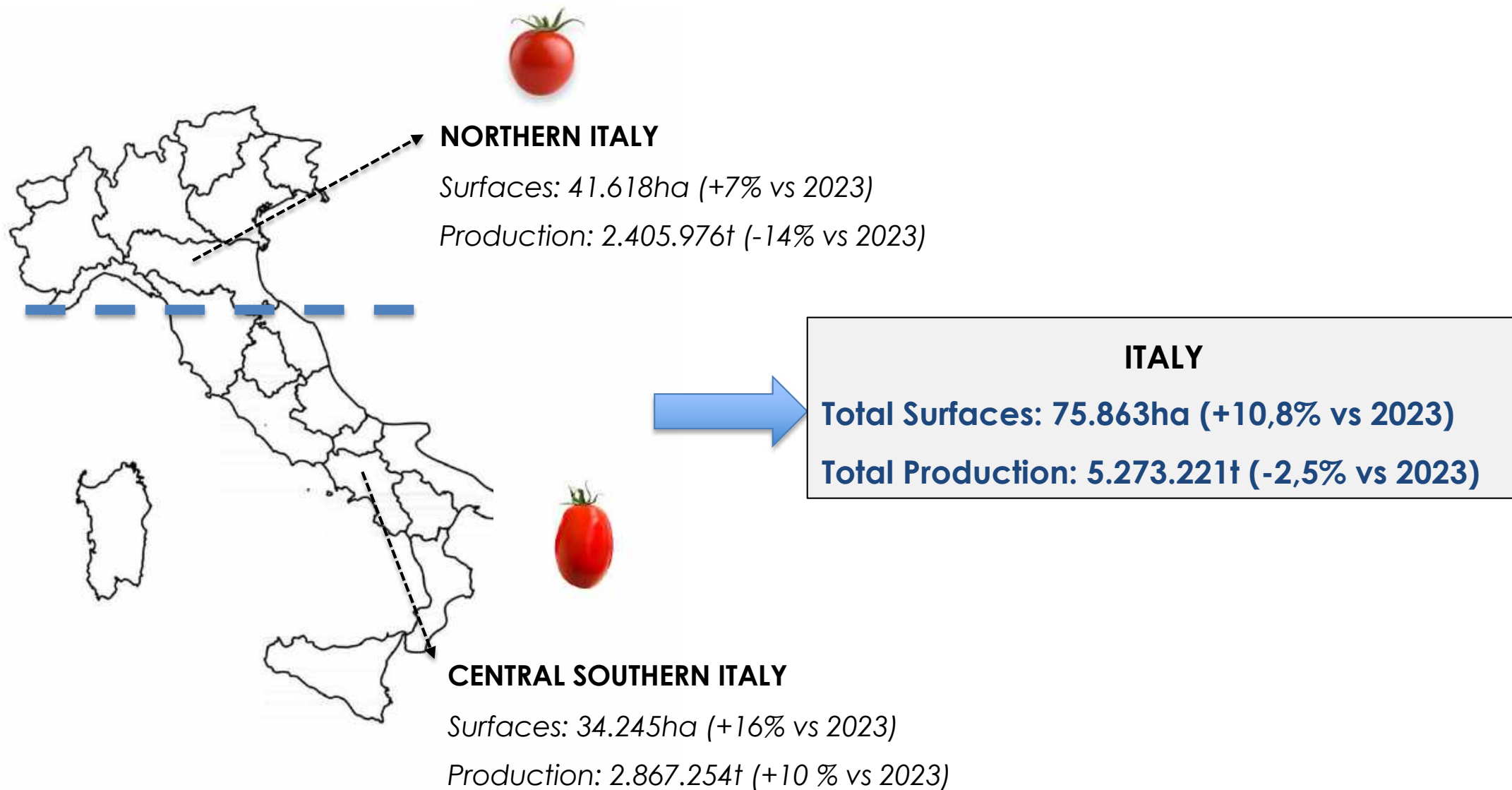
38.398

Var % 24/23 = +3%

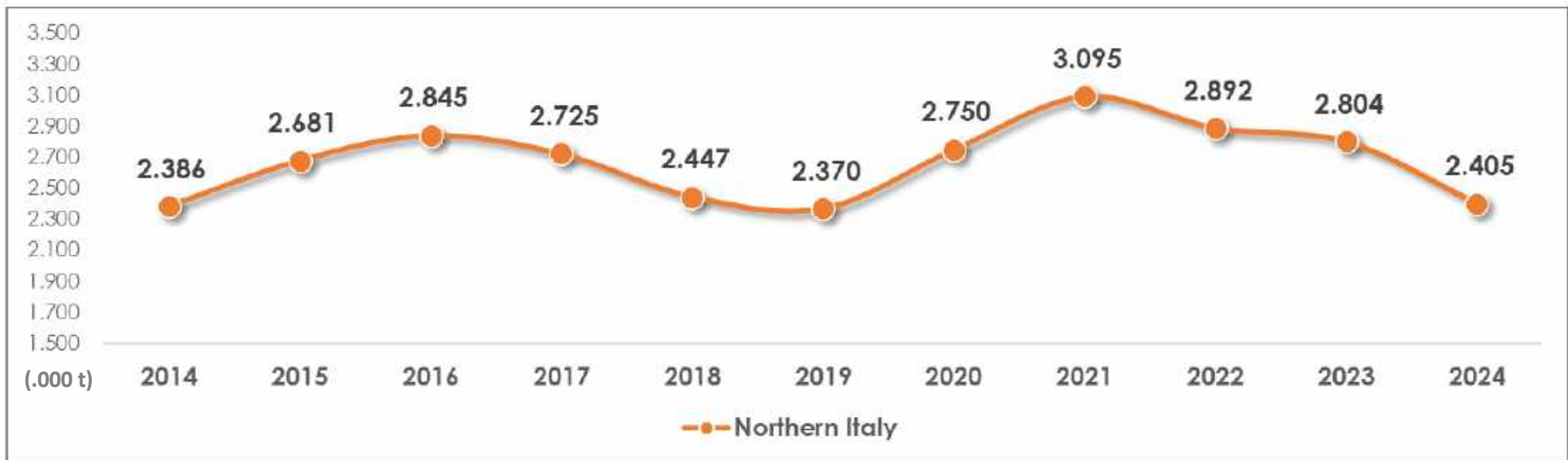
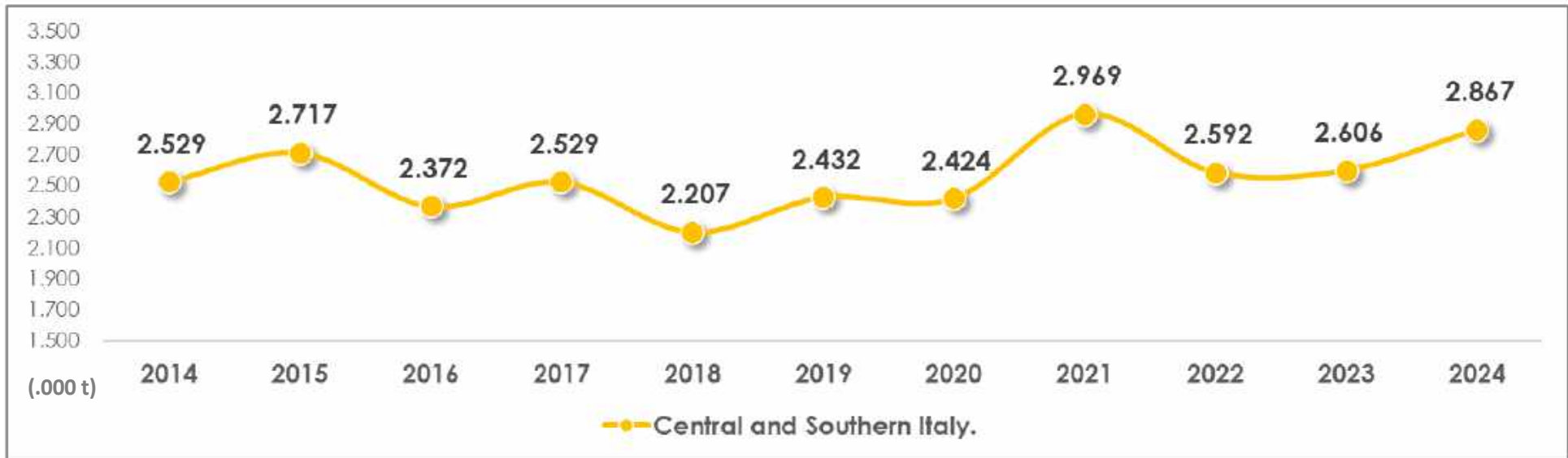
Var% 24/22 = +19%

Source: WPTC





Source: ANICAV & OI Northern Italy





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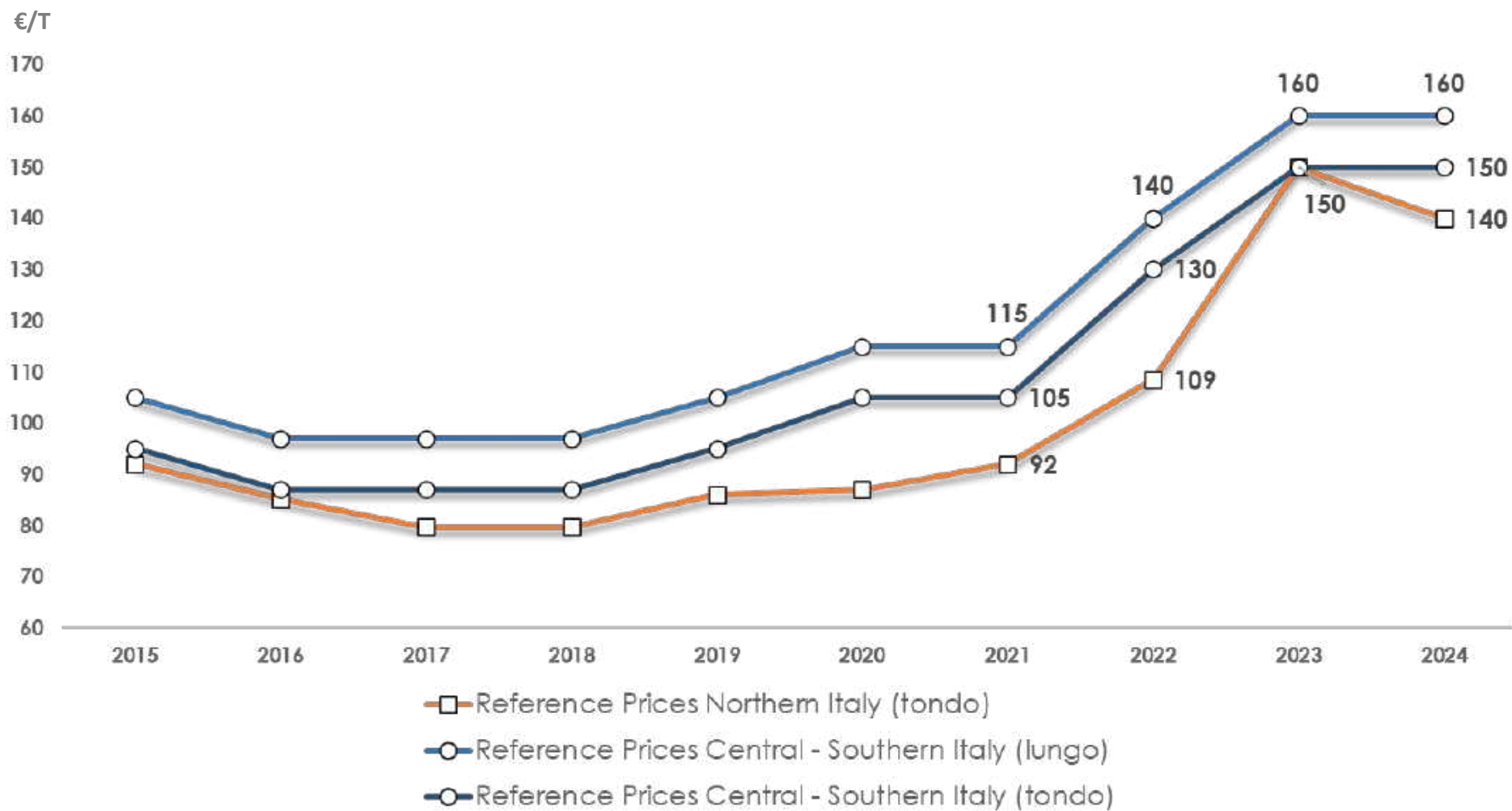
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Estimated Annual Levels of Reference Prices for Raw Material (USD/t)

- EU5
- California
- China



Source: Tomato news



Source: ANICAV & OI Northern Italy



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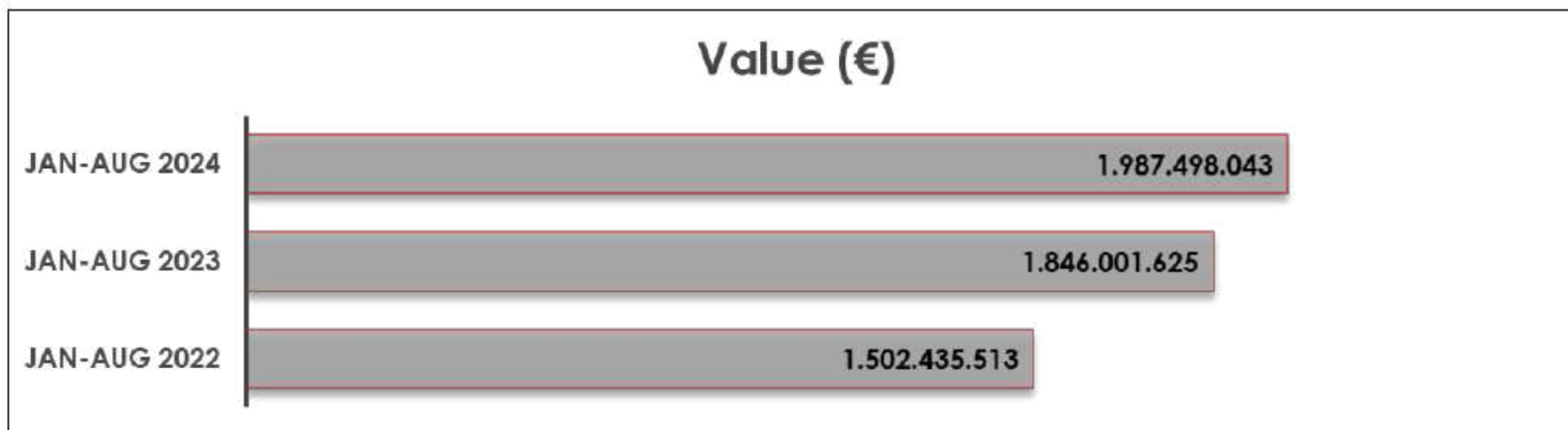
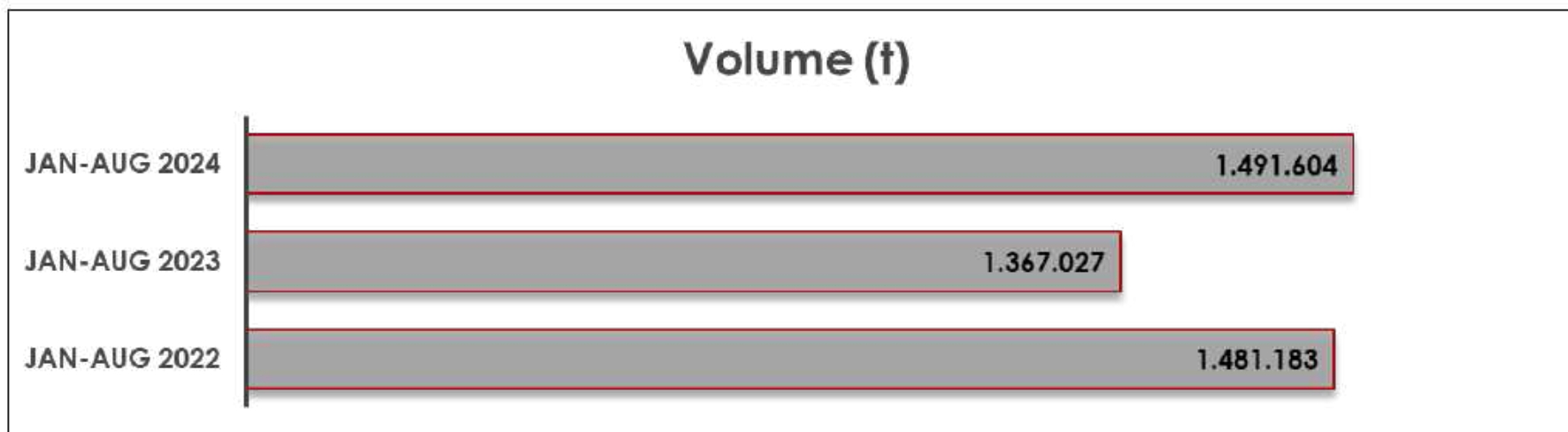
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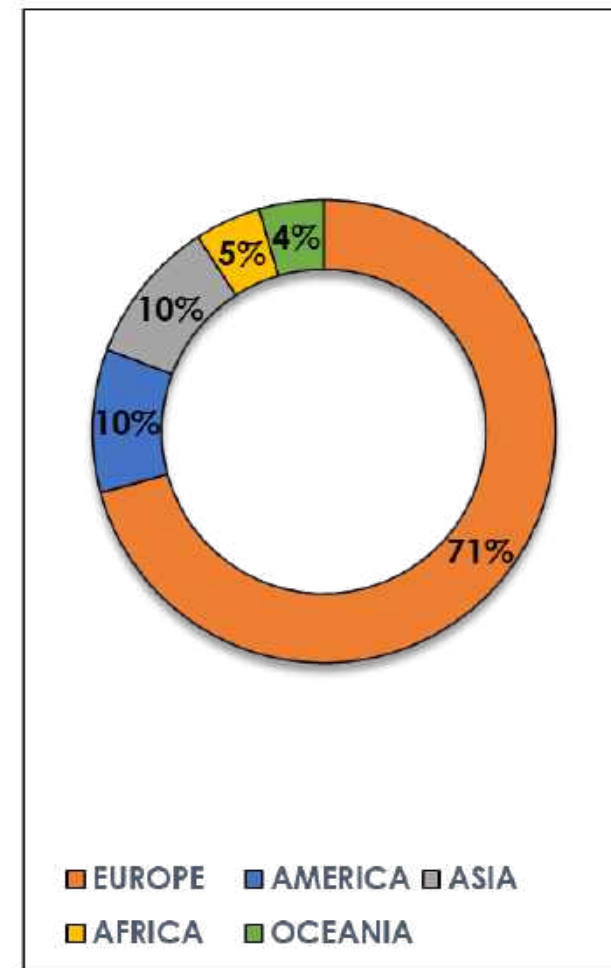
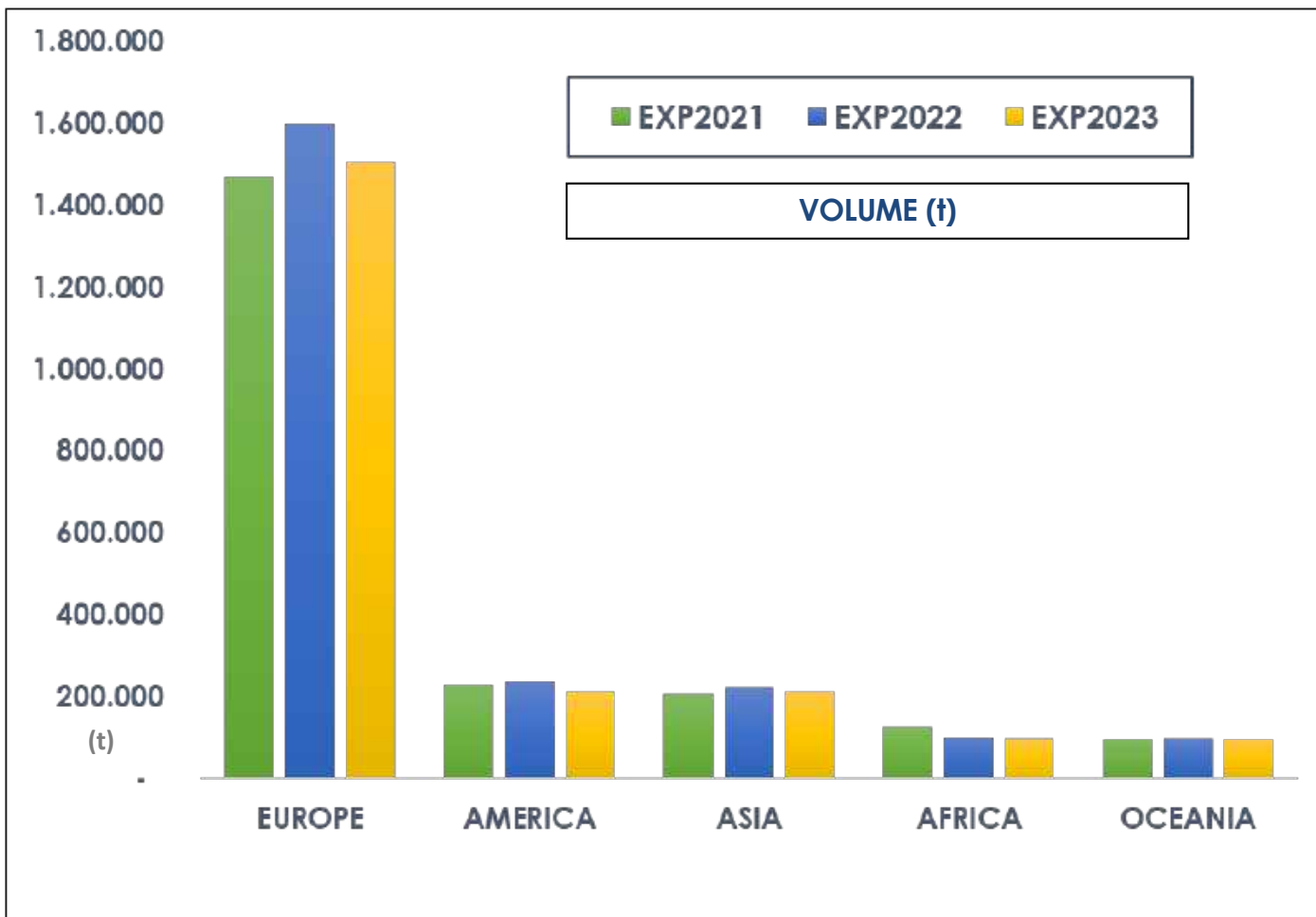
	Volume Export (kg)			
	2021	2022	2023	var%
All product	2.126.788.186	2.262.134.338	2.129.670.960	-6%
peeled and unpeeled	1.390.149.736	1.507.913.634	1.386.457.302	-8%
tomato paste	330.921.000	340.765.977	323.854.329	-5%
tomato puree	405.717.450	413.454.727	419.359.329	+1%

	Value Export (€)			
	2021	2022	2023	var%
All product	1.922.941.778	2.460.398.298	2.854.188.778	+16%
peeled and unpeeled	1.123.329.481	1.451.938.719	1.631.175.086	+12%
tomato paste	472.167.431	618.514.951	738.230.799	+19%
tomato puree	327.444.866	389.944.628	484.782.893	+24%

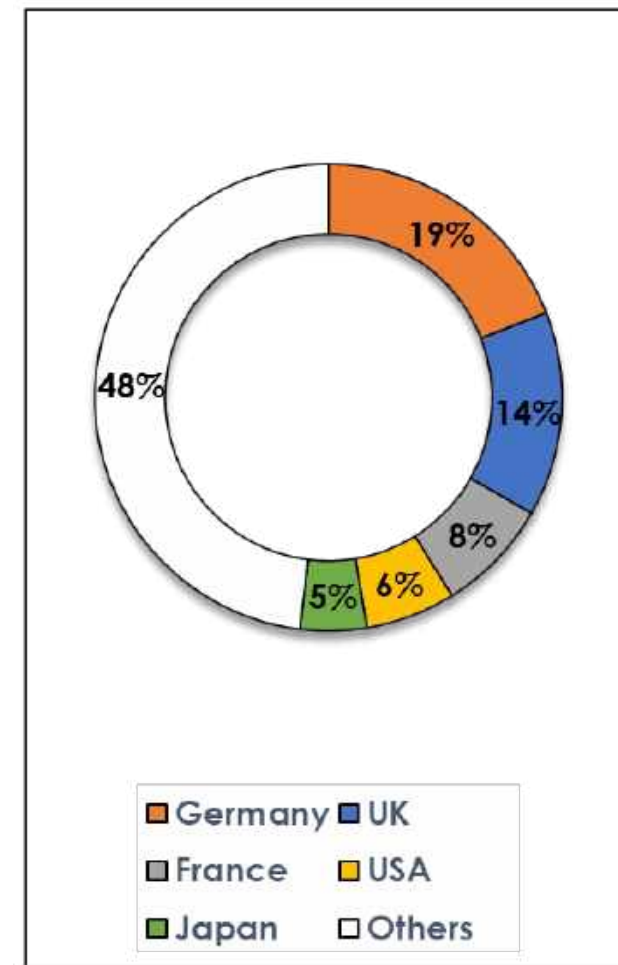
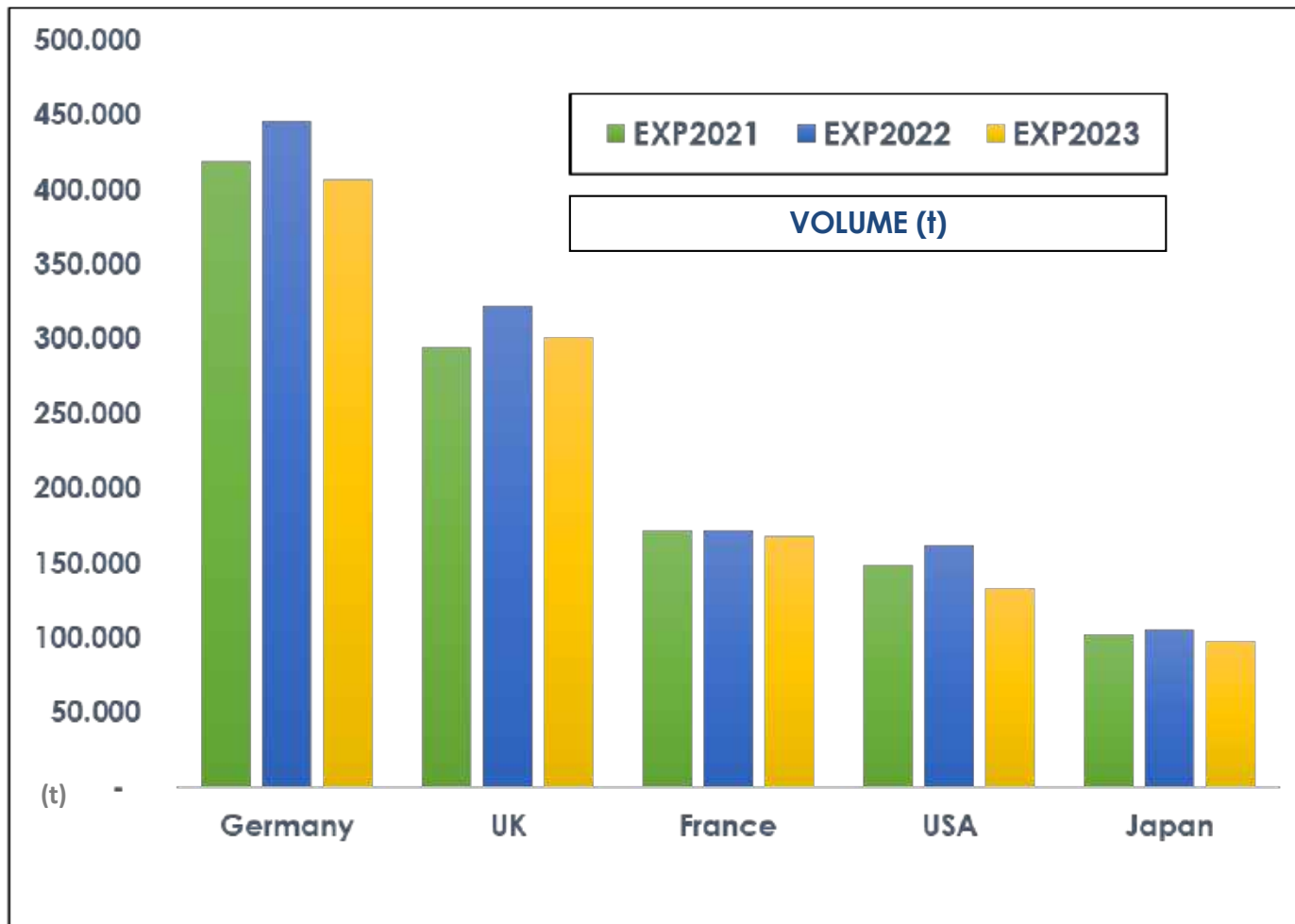
Source: ISTAT



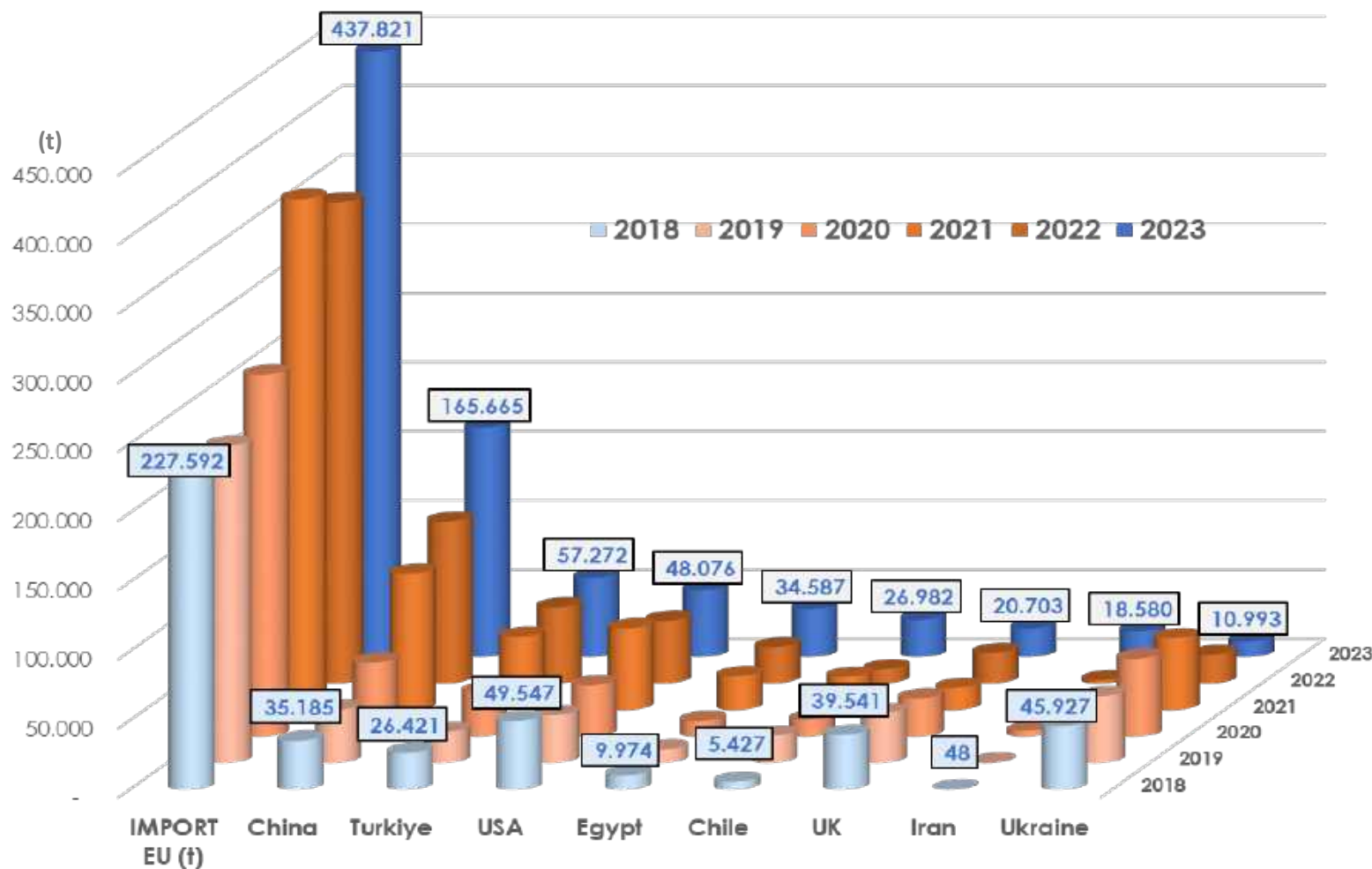
Source: ISTAT



Source: ISTAT



Source: ISTAT



	Var. 2023/2018
IMPORT EU (t)	+92%
China	+371%
Turkiye	+117%
USA	-3%
Egypt	+247%
Chile	+397%
UK	-48%
Iran	+38608%
Ukraine	-76%

***Data does not include TPA**

****Data considers all CN8**

<https://agridata.ec.europa.eu/extensions/DashboardTomato/ProcessedTomatoTrade.html>



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Climate Change

The extreme rainfall recorded in Northern Italy in 2024, combined with water scarcity in Southern Italy, has highlighted the fragility and inadequacy of Italy's water infrastructure.

CO2 Emission Reduction

The tomato industry is currently classified under ETS (Emission Trading System), inaccurately considering the high seasonality of the sector. The industry has few technical alternatives to significantly reduce emissions. The cost is enormous, creating a competitive disadvantage compared to non-EU producers.

Energy Costs

In Europe, energy costs are currently about twice as high as those in the United States. While the United States is a net energy exporter, the European Union relies on imports for 60% of its energy needs. This imbalance not only reduces Europe's competitiveness but also exposes it to the risk of external supply disruptions and price volatility. In Italy, in particular, energy costs are among the highest in Europe, further exacerbating the competitive challenges faced by businesses.

Excessive European regulatory framework

Between 2019 and 2024, the European Union adopted approximately 13,000 legislative acts, compared to about 3,500 legislative measures and 2,000 resolutions passed at the federal level in the United States. Such a complex regulatory framework significantly hinders Europe's industrial potential. An urgent intervention by European institutions is needed to simplify the regulations and support the competitiveness of the industrial sector.

Unfair Competition from Non-EU Countries

Countries like China, Iran, Turkey, and Egypt threaten the competitiveness of European producers. Their lack of obligation to comply with the same regulatory standards as Europe in environmental, phytosanitary, and social matters allows them to maintain significantly lower production costs, creating unfair competition.

Ban of the Use of Pesticides

In recent years, many pesticide substances have been banned. Recently, the ban on the use of Metribuzin was also announced. This situation is leading to higher production costs and a reduced agricultural yields.

Coupled Aid under CAP

The recent Common Market Organization (CMO) reform allocated marginal and insignificant resources to our sector. To maintain a fair competitive balance and promote sustainability, the quantification of coupled aid should be reconsidered, ensuring it is proportional to the cost gap between European and non-EU producers.

Reference Price of Italian Tomatoes

The reference price of tomatoes remains the highest in the world, undermining Italian competitiveness . In an increasingly globalized context in which our businesses operate, it is necessary to work, both in the North and in the South, towards a rebalancing of tomato prices

Thanks for your attention

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