

A stunned European market

The winter tomato market remains unsettled, between political tensions and sanitary pressure. Competition remains strong since consumption is treading water at this time of year, and could even fall in the coming years if some distributors stick to their stated intention to drop winter tomatoes from their listings.

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Ebb and flow

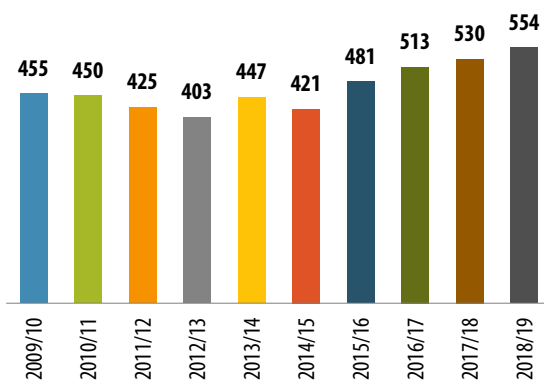
After the adjustments from previous campaigns, the new hand taking shape could well emerge quicker. While Spain remains the number one supplier to the EC market, with just under 700 000 tonnes of shipments to Europe in 2018-19, we should stress that it is losing ground on the extra-Community origins. Quantities shipped were down 3 % on 2017-18, between the structural downturn in the Canaries and the fall in yields on the Peninsula (diversification of range, sanitary pressure). Yet the rise in extra-EU tonnages is also partly due to the tribulations in Russia. Moroccan exporters are increasingly cautious with regard to this destination, where difficulties are mounting (logistics, sanitary controls, payments), and are preferring to target other export markets. Last year they switched volumes to neighbouring markets, setting a record of 426 000 t in Europe (+ 11 %). For its part, Turkey came back into favour on the Russian market, leading to a downturn in Europe (- 8 %). Tunisia gained some market share in Europe (+ 45 %) through strengthening its relationship with Italy. Conversely, volumes from Senegal were stagnant, in fact registering a fall in 2018 (- 7 %). However, SAED is hopeful that production will reach 100 000 t, as opposed to 60 000 t in 2018-19, when 80 000 t had been forecast. Imports from Israel have become insignificant.



Turmoil in Spain

Profound changes are taking shape, especially in Spain, since after consolidating their production in particular through diversification, a number of professionals now believe that they cannot cope with the sanitary and economic difficulties predicted (competition from Morocco and Turkey in the winter, and from Benelux and Poland in the summer), and have decided to switch crop. Hence although surface areas were still stable last year, around the three-year average (15 187 ha), the 2019-20 campaign could mark a turning point. Integrated pest management against *Tuta absoluta* is insufficient. The release of predatory insects merely slows the impact on crops, since these insects are effective in the summer/autumn cycle, but less active in spring, when *Tuta absoluta* reproduces exponentially. It is also difficult to maintain a balance between predators and *Tuta absoluta*. The new threat from Tomato Brown Rugose Fruit Virus (ToBRFV) is also weighing down on the crops (see inset). Yet it is above all the big increase in production costs, especially the minimum wage (+ 20 % on 01/01/2019) which is giving growers pause for thought. Hence there could be a 10% fall in surface areas, or even 20 % in Almería, from 2018-19, although the turnover from this campaign was up 10 % on 2017-18, given the prices obtained. Furthermore, the threat from Brexit is hastening the decline in surface areas in the Canaries, since growers might no longer receive aid under POSEI, previously provided by Europe on exports to the UK. As this destination accounts for 50 % of tonnages, they have opted to take matters into their own hands by scaling back their production, which could see a 15 % fall for the tomato, while the number of growers should be reduced three-fold for the cucumber. Finally, the September floods took their toll, although vegetables grown under cover were less affected than those grown in the open: 200 ha of greenhouses were reportedly lost in Almería province, where 1 500 ha were hit by storms. These primarily affected the Nijar zone, with El Ejido mostly spared.

Tomato - EU-28 Extra-Community imports
October to May (in 000 tonnes | source: Eurostat)



Tomato – EU-28 – October to May imports

in tonnes	2018-19	2018-19 compared to	
		2017-18	3-year average
Spain	678 698	- 3 %	- 8 %
Morocco	426 069	+ 11 %	+ 12 %
Turkey	74 423	- 21 %	- 8 %
Senegal	8 865	- 7 %	- 9 %
Tunisia	14 118	+ 45 %	+ 50 %
Israel	113	- 83 %	- 90 %
Other Extra-EU suppliers	30 700	+ 3 %	+ 11 %
Total Extra-EU suppliers	554 288	+ 5 %	+ 9 %

Source: Eurostat

New port under construction in Morocco

In spite of the volumes imported into the EU-28 last year, another fall in Moroccan surface areas is expected, after an initial conversion phase last year. This fall could be as much as 15 % of areas, especially for round tomatoes, with another switch to berries or other crops such as courgettes. Round tomato specialists should however maintain their tonnages, with well-established programmes; others will primarily go in for small segmentation. The Dakhla zone remains the focus of attention. In September, the Moroccan Ministry for Equipment, Transport, Logistics and Water launched a call for tenders for the construction of the port of Dakhla Atlantique (to be assessed from 7 November), and created a provisional Directorate within the Ministry to supervise the construction of the port, which should be operational in seven years. It has also stated that it has revised upward its forecast investment for this new port, set to cost 10 billion dirhams (940 million euros). The port will comprise a 2 800 m main dyke, a 600 m secondary dyke, a commercial quay 800 m by 12 m, and a deep-sea fishing quay 1 500 m by 7 m, a 39 ha dock and a boat lift with a capacity of 450 tonnes. The provisional traffic for the first few years is 2.2 million tonnes. Furthermore, the campaign is slightly behind schedule by ten days or so, which can be explained by the labour shortage during planting, which coincided with Eid al-Adha. However, even those who opted to plant before this date were delayed due to the climate conditions. The high temperatures which affected the first crop (quality and coloration defects) could also have repercussions in terms of tonnage on the other crops ■

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Tomato Brown Rugose Fruit Virus (ToBRFV) Implementing quarantine measures

Sanitary pressure on the tomato is constantly ramping up. After *Tuta absoluta*, still causing major damage, there is now a new sword of Damocles hanging over the heads of tomato growers, with the dissemination of a new virus, Tomato Brown Rugose Fruit Virus (ToBRFV). Discovered in Jordan in 2015, but more probably present since 2014 in Israel, the virus spread rapidly, causing major damage to Middle Eastern growers. It has now wandered further north, and was detected in Germany (apparently 25 ha), California and Mexico in 2018, in Italy as of early January 2019 (2 000 m² infected in Sicily), and then by a British company based in Kent in July 2019. There are also suspicions in the Netherlands, though for the moment no cases have been registered in France or Spain. ToBRFV is highly damaging to crops. It reduces the number of flowers and fruits, and causes major damage to the fruits (deformation, yellow discolorations, brown necroses, etc.), which make them unmarketable within a few weeks. Losses represent 30 to 70 % of the yield.

This virus is very easily and quickly transmitted through contact, by the wind or via workers' hands, their clothing or tools or equipment. As a tobamovirus, it is also apparently transmitted by seeds, and is able to persist

in them for several years, as well as in plant residue and soil for several months. To date, no resistance gene has been identified, and those for other viruses in the tobamovirus family are ineffective against ToBRFV. Hence the European Union has established emergency rules set to enter into force on 1 November 2019 for pepper and tomato growers, as well as seed producers and nursery operators. Growers will be obliged to inform the competent authorities in case of ToBRFV infection, though each Member State will be able to determine what measures to take in the presence of the virus in the crops. For seed producers, tomato and pepper seeds must be free from ToBRFV or come from regions free from the virus, both before entry into the EU and before entering the market. The authorities are also encouraging professionals to take strict preventive measures (disinfecting tools, eliminating crop debris, using certified seeds or plants). It is strongly recommended to take measures to prevent the sanitary risks associated with people entering the greenhouse (overalls, access authorisation, closed doors, clothing, protective gloves and footwear, etc.), as well as equipment from outside the farm (crates, tools, etc.). In France, Anses-LSV qualifies the probability of the introduction and spread of ToBRFV across the country as very high.