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European Processed Tomato Trade Challenges, Pressures & Global Positioning

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Europe in the Global Landscape

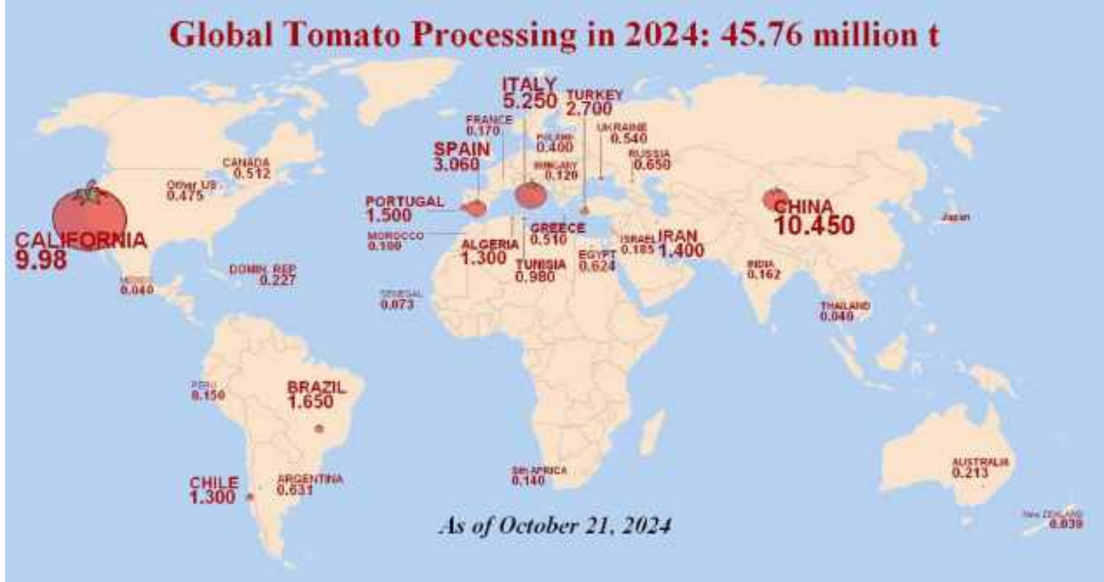
Europe: One of the Three Global Pillars

Global processing volume:~45 million tonnes (fresh tomato equivalent)

Key regions:

- United States: ~11–12 million tonnes (FTE)
- China: ~11 million tonnes (FTE)
- Europe: ~10–11 million tonnes (FTE)

Europe is one of the three global processing centres



Source: WPTC, 2026

Structure of the European Sector

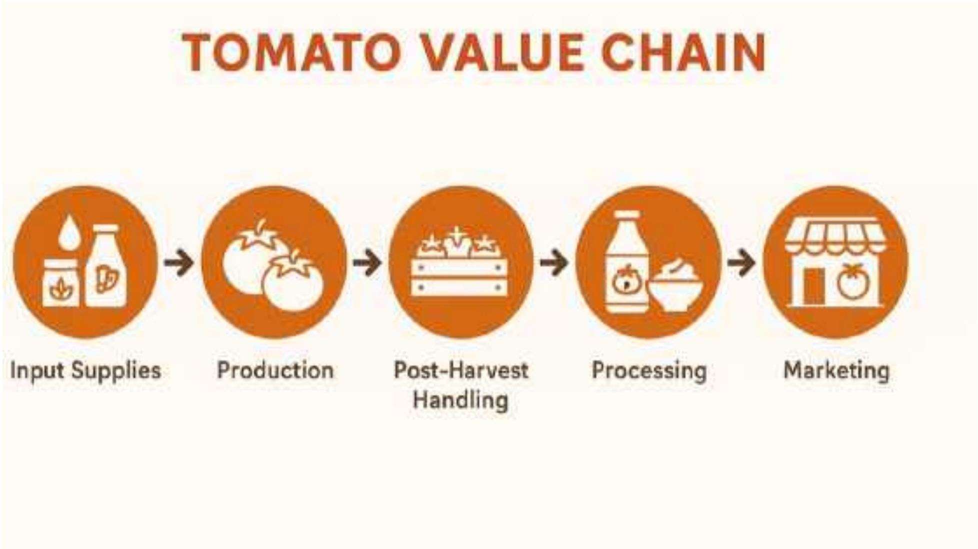
A Highly Integrated, Value-Driven Industry

Main producing countries:
Italy • Spain • Portugal • Greece • France

Sector characteristics:

- Close farmer–processor integration
- Highly organised supply chains with contract-based production determining price, quality and volume
- Strong internal market integration

Positioning:
• Premium products
• Traceability and origin
• Food safety leadership



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Domestic Market and Demand

A Strong and Stable Internal Market

EU consumption:
~38 kg per capita annually

Role of domestic market:
- Absorbs large share of production
- Reduces exposure to global volatility
- Supports industry stability

Comparison:
- US: primarily domestic
- China: primarily export-oriented
- EU: balanced model

Trade & Export Position

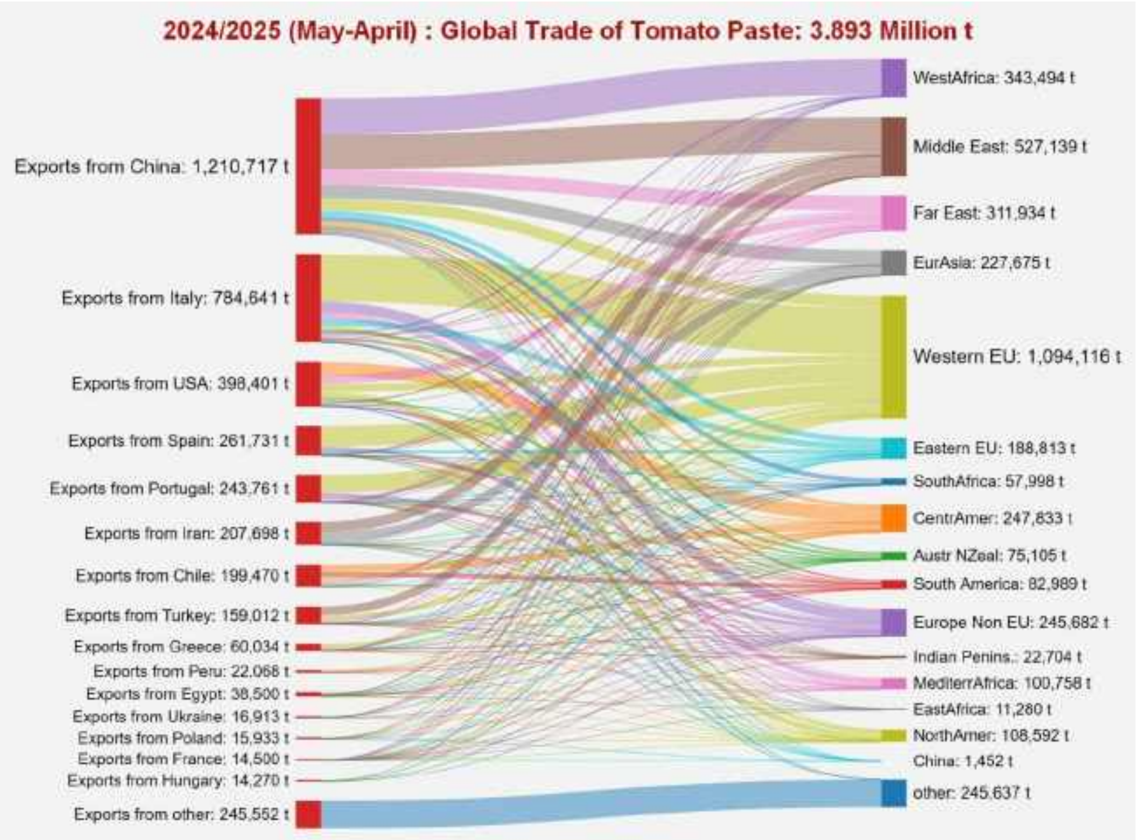
A Global Export Leader in Value-Added Products

Exports:
~1.7 million tonnes (processed products)
Equivalent to significantly higher volumes in fresh tomato equivalent

Export profile:

- Sauces, passata, branded products
- Strong presence in nearby and global markets
- High share of finished consumer products

Europe exports value, not just volume



Source: World Processing Tomato Council

Evolution Over the Last Decade

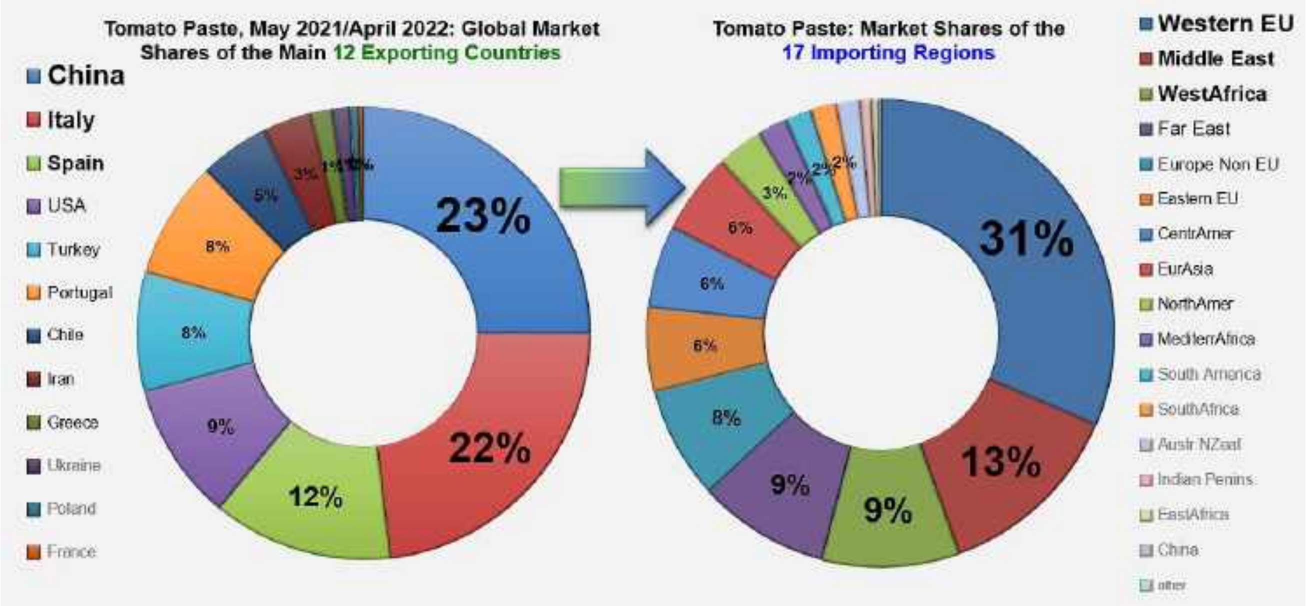
Stable Growth in a Changing Global Market

Global market:

- Steady growth (+1–3% annually)

Europe:

- Stable processing volumes (FTE)
- Increasing focus on:
  - – Domestic market
  - – Regional exports



Source: TomatoNews

Trend:

- Global growth increasingly driven by China and emerging players
- Europe increasingly consolidating its position rather than expanding globally

Internal Pressures

War in Ukraine
- Increased fertiliser costs
- Higher energy prices
- Disruptions to logistics and trade flows

Brexit:
- Increased administrative burden
- Friction with key export market (UK)

Regulation:
- Pesticide restrictions
- Sustainability requirements
- Emissions Trading System

Energy:
- High energy intensity of processing
- Strong increase in costs since 2022

Result: Europe faces structurally higher production costs vs global competitors

External Competitive Pressures

Growing Global Competition

China:
- ~11 million tonnes processing (FTE)
- Strong export orientation
- Highly competitive on price

Turkey & Egypt:
- Lower production costs
- Geographic proximity to EU

Impact:
- Pressure on EU domestic market
- Stronger competition in export markets

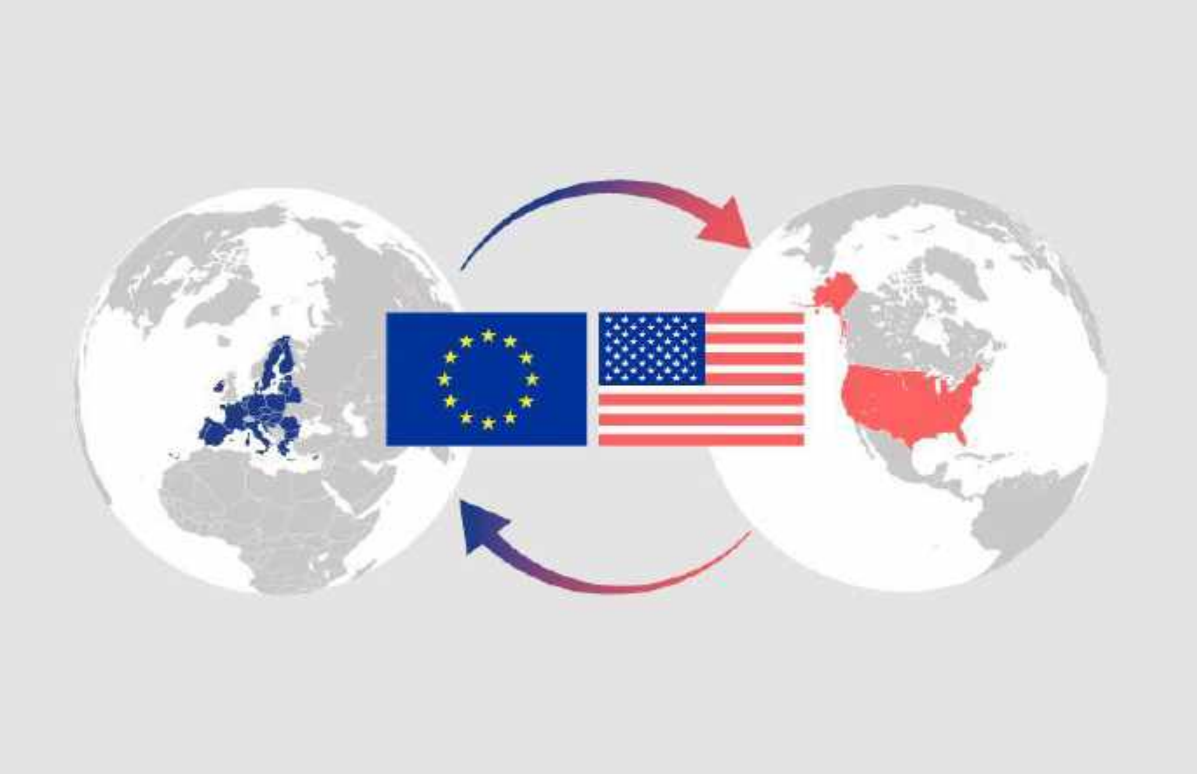
Competition increasingly driven by cost per tonne

EU–US Trade Relations: Increasingly Uncertain

Recent developments:
- Tariff threats and policy shifts
- Ongoing negotiations with unclear outcomes
- Increased volatility in agricultural trade conditions

Implications for Europe:
- US market access cannot be taken for granted
- Exposure to political and economic risks
- Pressure on export stability

Strategic response:
- Diversifying export markets
- Accelerating Free Trade Agreements (FTAs)
- Reducing reliance on single partners→ The US remains a key partner,   but no longer a fully predictable one



Trade Strategy & Conclusion

A Sector at a Strategic Crossroads

EU response:
- Expanding Free Trade Agreements:
- Mercosur
- India
- Indonesia
- Australia
- Others

Objectives:
- Maintain access to global markets
- Secure outlets for production
- Preserve competitiveness

- Key message:
- Europe remains a global leader, but faces increasing structural pressure.