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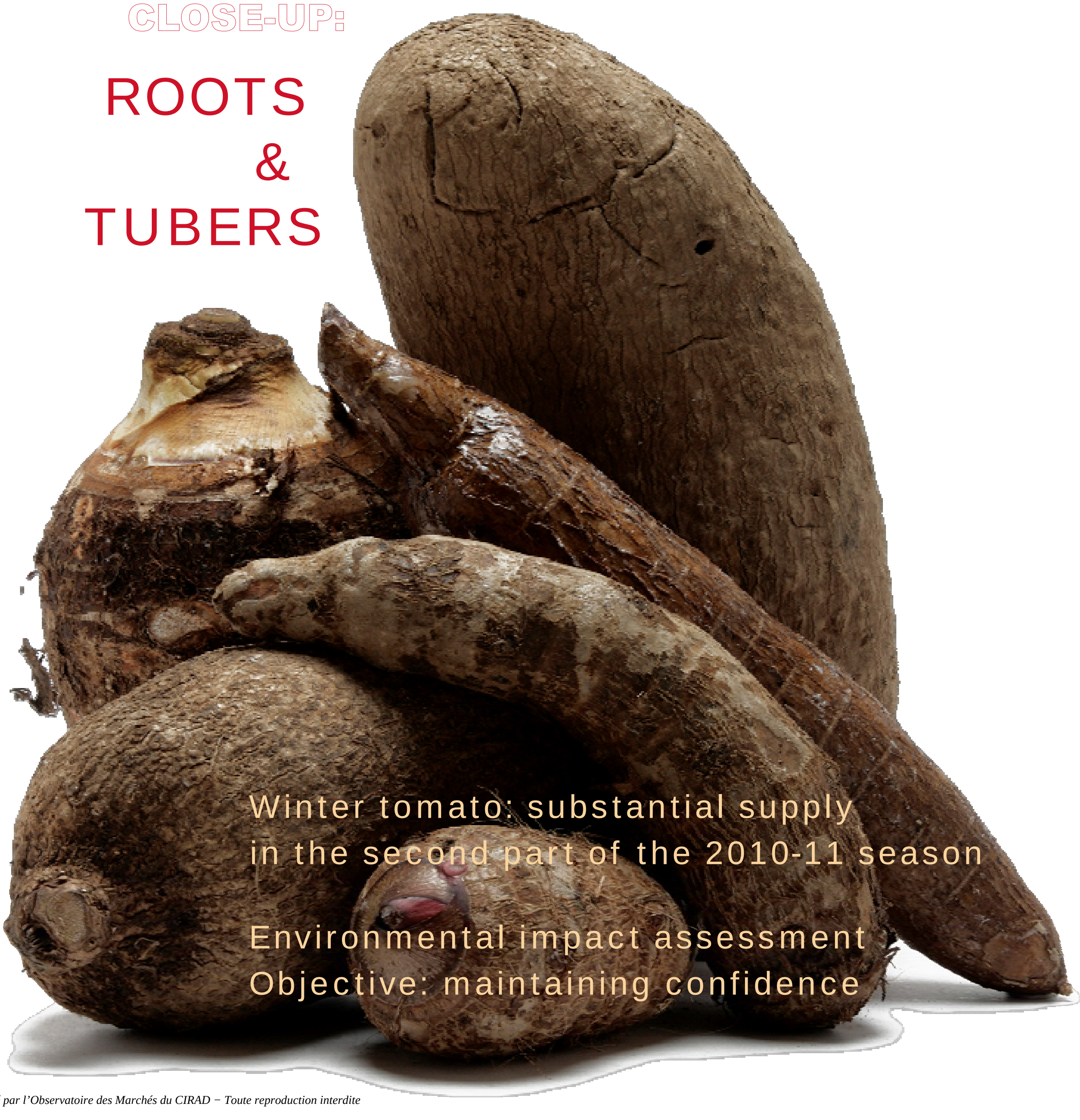

Winter tomato: substantial supply in the second part of the 2010-11 season

Environmental impact assessment
Objective: maintaining confidence

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Winter tomato

Substantial supply in the second part of the 2010-11 season!

The 2009-10 season was hard once again for winter tomato growers, hit by recurrent weather problems that aggravated continued pest pressure. But producers are not giving up and are testing new strategies again this year, while negotiations for the liberalisation of trade are in progress around the Mediterranean.

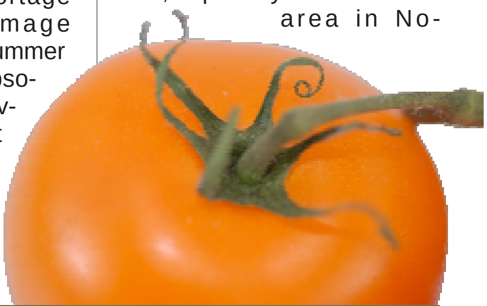
Interest in the European market still increasing

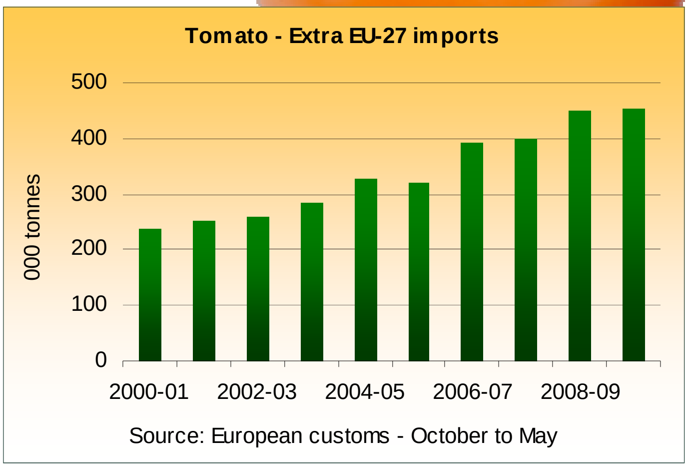
The growth trend in extra-EU imports weakened a little during the last season, not because of lesser demand but because of bad weather and pest problems (*Tuta absoluta*), affecting Moroccan producers in particular. Provisional European customs figures for October to May (+ 1% on 2008-09) indicate that the total was thus 454 000 t from all sources.

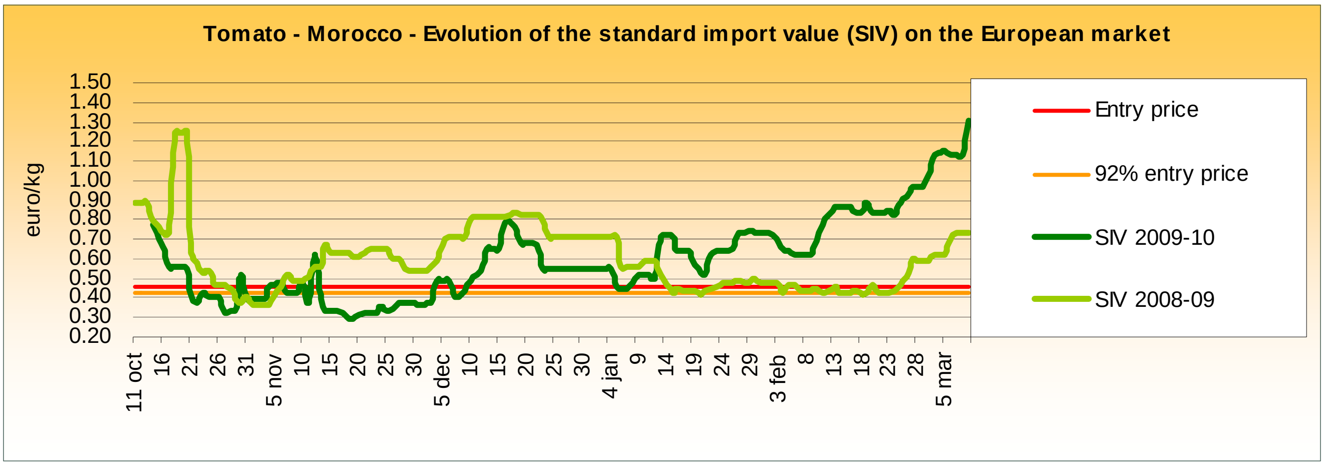
At 266 000 tonnes, imports from Morocco were 18% down, returning to the level observed three years ago. Likewise, bad weather limited Spanish shipments (682 000 t, provisional European customs figures for October to May). Although the total was 12% up on 2008-09 exports at the beginning of the season (November and December), it was 20% smaller than in 2007-08. However, the decreased pressure from these sources allowed other Mediterranean producers to gain new market shares and continue or accelerate their development. Community imports from Turkey thus gained 42% in comparison with 2008-09 (106 600 t), shipments from Israel were up by 20% (26 048 t), those from Tunisia by 80% (9 950 t) and those from Senegal by 25% (8 400 t). Some sources still little represented on the EU market also made notable progress. Jordan was one of these, with tomato exports to Europe up by 127% to 6 900 tonnes.

Bugs in the 2009-10 season!

The 2009-10 season was particularly chaotic and dotted with numerous difficulties in both Spain and Morocco. Thus, in September, Morocco featured strong competition between export markets, which are not very dynamic at this time of year (crisis in summer fruits) and the local market where the combination of strong demand during Ramadan and a shortage resulting from damage caused to open field summer production by Tuta absoluta sent prices up. Nevertheless, although it happened 10 to 15 days later than in 2008-09, the growth of Moroccan exports was just as rapid, with arrivals still at 65 t per week at Saint-Charles wholesale market (Perpignan) in Week 40 and then reaching 2 600 t in Week 42 and 6 400 t in Week 45. However, in contrast with the previous year, the growth of supply was slowed by strong Spanish presence and a rapid fall in prices leading to the setting up of the MTE (maximum tariff equivalent) on 21 October 2009. This was maintained until nearly the end of November. Planting was carried out in Spain two weeks early so that the plants could root well before the winter cold that had caused substantial losses in the previous year. The particularly warm weather in autumn 2009 resulted in a marked increase in production, especially in the Almeria area in No-







vember. The market only cleared gradually in December when the cold weather started and slowed Moroccan and Spanish production and demand was stimulated by the approach of the Christmas period. The market was then hit by the very heavy rainfall in Week 52 that caused large-scale flooding in both Spain and Morocco. This resulted in the serious spread of pests (*Botrytis*, *Tuta absoluta*, mildew) that worsened with the rise in temperatures in mid-January and growers had to grub up very large numbers of plants. Volumes thus remained small until the end of the season, especially as more rain in Week 7 further aggravated pest pressure, with up to 75% of the fruits rejected at sorting in February, and caused much damage, especially in the Canary Islands. Prices therefore increased steadily, with particularly marked tension at the end of March during the Easter period.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Fresh shift in Spanish production in 2010-11

Spanish growers have had to made fresh adjustments for the new season and restructuring is continuing with the creation of 'super cooperatives' and partnerships with northern European operators. The planting calendar was shifted by some two or three weeks throughout the Almeria region to prevent over-production at the beginning of the season and to limit pest pressure. Some pests, such as *Tuta absoluta* that has caused serious damage in the last two years, seem to be under control. However, it seems that growers must now handle an increase in outbreaks of TYLCV (Tomato Yellow Leaf Curl Virus). These are the result of hot weather at the end of the summer and are reported to have caused large losses on several farms (200 ha in the Níjar area) where 20 to 50% of production has been affected as the varieties do not possess complete resistance. Thus only 70 to 80% of planting had been completed at the end of September. Planted areas should be stable overall in the Almeria region although dips in production have still been observed in some zones (- 5% around Níjar), especially in the small segment where there has been a move to courgettes and cucumbers. Planted areas are also stable overall in the Canary Islands, sometimes with a slight decrease but the modernisation of facilities (increased yields) and the pest management procedures used should result in a larger crop than last year's, which was down by 16% in comparison with 2008-09 as a


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result of the damage caused in the islands by an invasion of *Tuta absoluta*. Likewise, growers in the Murcia region hope for an increase in production after the losses suffered last year that resulted in a 13% decrease in exports.

Good potential in Morocco, but no new agreement

In contrast, no real increase is expected in Morocco. Planted areas are reported to be stable overall at 5 000 ha, of which 4 600 ha is greenhouse production, and production is estimated at 800 000 t, of which 17% is cherry tomatoes. The beginning of the season was somewhat light after the very hot weather at the end of August when temperatures of over 45°C affected the first clusters. Nevertheless, the number of market sales operators is still increasing in Europe, causing strong demand for Moroccan produce. Thus substantial volumes are expected from the second half of October onwards and above all in November, especially as growers have concentrated strongly on control of tomato leaf miner (*Tuta absoluta*), which does not seem to have caused much damage to open field production. However, planting seems to have been better staggered this year.

There should not be any change in the zero-rated quota this season, even though negotiations of the Euro-Mediterranean Agreement with Morocco—at a standstill in recent months—were officially re-launched on 16 September with the adoption of a draft of the new proposal by the European Commissioners. The process should be a long one because the Council has two months in which to accept the proposal, which is then examined by the European Parliament before returning to the Council and, furthermore, unlike previous agreements, this one involves the reciprocal liberalisation of trade. The Agreement is not forecast to come into force before mid-2011 at the earliest.

Agreements signed for other supply sources but potential is small

However, negotiations with several countries in the Mediterranean area gained momentum at the end of 2009. They first resulted in an agreement with Egypt, with the total abolition of ad valorem import dues for Egyptian tomatoes between 1 November and 30 June starting in June 2010, with no quota and with a minimum price on entry. Likewise, an agreement was finalised with Israel within the framework of these bilateral negotiations, allowing the export of 28 000 t of cherry tomatoes and 5 000 t of other tomatoes with zero customs rating from 1 January 2010. The first agreement submitted by Morocco within the framework of bilateral negotiations at the end of 2009 planned a gradual increase in the Moroccan zero-rated quota from 233 000 t today to 285 000 t in 2014, including additional quotas. These preferences will be awarded on the same calendar basis as today's, that is to say from October to May and with the same entry price as that currently in force.

Nevertheless, pest pressure has increased in the Near East in recent weeks and this, together with the very hot weather at the end of this summer, has caused a serious decrease in production. The first significant damage attributed to *Tuta absoluta* was identified in January in greenhouse crops in Turkey, affecting at least 25% of production. The pest has also been detected very recently in Egypt, Jordan and Iraq, where it is reported to have caused serious damage ■

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