WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 25 October 2018

AMITOM members in the EU

In **France**, the final volume delivered to the factories is about 152,000 tonnes, but the rate of rejects was quite high this year at 8.2% meaning a net volume processed of 140,000 tonnes. About half of the volume was processed into paste. Organic production was about 10,000 tonnes.

In **Greece**, the 2018 season was not a good one, even probably the worst in the last twenty years, with bad weather and notably rain at the wrong times. This resulted in a 25% reduction of the production compared to the initial forecast, to only 320,000 tonnes. Processors hope to recover surfaces in volume in 2019 to maybe process about 450,000 tonnes.

In **Hungary**, the end of season was not ideal, and the harvest ended 7 to 10 days earlier than usual on 20 September with a total of only 106,000 tonnes processed instead of the 120,000 tonnes initially expected from the 1,350 hectares planted. Fruit quality was not great and the average brix was 4.78. The volume expected for 2019 should remain in the order of 120,000 tonnes.

The final production in **Italy** was 4.65 million tonnes with 2.45 million tonnes in the **North** and 2.2 millions tonnes in the **South**. Only 85% of the volume contracted was delivered (*see attached report with detailed figures*).
In the **South**, the season was short with a late start of the harvest (by one week) and an earlier end (in week 40). It was affected by a very rainy spring and rains during the harvest (week 33). Factory yield was lower than last year. One of the issues reported is that growers plant too much long varieties as they have higher farm yield (up to +20%) but have a lower brix and factory yield than round varieties when used for concentrating or dicing than the canning they are intended for (and paid higher price for).
In the **North**, the season was good and the final volume represented 98% of the volume contracted with better factory yield was than last year of puree and paste (but not for dices).

In **Portugal**, the 2018 season was also difficult with a difficult spring, a very late harvest (up to 3 weeks delay) and lower than usual farm yields (average about 85 t/ha). This led to a reduction in the forecast from 1.40 millions tonnes before the season, down to 1.25 million tonnes, then to 1.1 million tonnes. A good end of season enabled to reach a final figure estimated between 1.15 and 1.18 million tonnes. Fruit quality and brix were however very good which led to higher processing yields than last year. Colour which is usually excellent in Portugal, has not been great over the last three years. It is impossible to forecast now what to expect for 2019 but it is unlikely that there will be an increase in the surface planted.

In **Spain**, it was also a very troubled season with worries about a drought in the early spring, followed by too much rain during planting and cool weather in June and July, which led to a very late start of the harvest. At the end of August, only 45% of the crop had been harvested instead of the normal

65%. The last company in the North is just closing and the final volume is estimated at 2.8 million tonnes. A similar volume is expected for 2019 but it is too early to establish.

Other AMITOM members

Contacts made at SIAL suggested that the figure reported for **Algeria** (500,000 tonnes) is probably too high, while in **Egypt**, 2018 production was probably higher than the 300,000 tonnes estimated earlier in the absence of local information (one large local processor estimate it at between 400,000 and 450,000 tonnes).

In **Tunisia**, the total volume processed was 629,000 tonnes of tomatoes, of which 610,000 tonnes for the production of paste and 19,000 tonnes for canning. Production in 2019 could reach 750,000 tonnes.

In **Turkey**, the 2018 season was a very bad one, with lower surfaces planted due to competition with other crops (cotton and corn mainly), damaged surfaces due to hailstorms in the south, tomatoes being diverted to the fresh market due to greenhouses being affected by a virus, … While the price of contracts was about 360 TRL, these were raised to 450 TRL during the season and tomatoes were sold on the spot market for 500 TRL. The final production remains estimated at 1.3 million tonnes.
There are no stocks so processors will want to process at least 2 million tonnes next year. Input cost are however increased due to devaluation of the lira and it is unlikely that growers will increase the surface planted so a first guess would be 1.8 million tonnes for 2019.

In **Ukraine**, the harvest started in early August and ended on 10 October with a final volume of 735,000 tonnes, slightly below the target of 750, 000 tonnes. It was a difficult season with rains during the last two weeks of July and during three weekends of September. This led to diseases and a low brix across the region (average 4.75) and a low factory yield. The target for 2019 is 850,000 tonnes.

Other WPTC countries

In **Brazil**, the harvest season should finish during the first week in November. Heavy rains are leading to a reduction in the final volume which will probably be circa 1.4 million tonnes instead of the 1.49 million tonnes earlier estimate.

In **California**, most factories finished ten days ago with only small production remaining to be reported. The final volume should be close to 12.2 million short tons (11,065 million metric tonnes). The end of the season was uneventful. It is too early to make a prediction but 2019 volume should not be smaller, probably of a similar size.

In **China**, it is estimated that the 2018 processing season ended with a total volume of about 3.8 million tonnes, slightly more than the 3.7 million tonnes expected at the beginning of the season, but a large drop compared with the 6.2 million processed in 2017.

In **Japan**, the total volume processed in 2018 was 25,200 tonnes from 420 hectares.

In **Ontario (Canada),** the tomato harvest is now wrapped up after a very successful year with quality, colour and solids reported to be good to excellent throughout the entire season. Contracted tons were 471,624 short tons (427,850 metric tonnes) and the final production was 496,000 short tons (450,000 metric tonnes) net delivered.

In **South Africa**, the warm weather and the end of the season have impacted negatively on the total volume.. The final estimate is 135,000 tonnes.

Other countries

In the **US Midwest** the harvest ended in early October with a total volume of 438,000 short tons (397,000 metric tonnes), excluding Pennsylvania (where production is small). Some crop losses were experienced due to the heavy rains in September, but the final volume is close to the original contracted amounts.

In **Poland**, the final production is higher than initially expected at 200,000 metric tonnes, due to a good weather for the late crop which enabled to extend the season until 15 October. The surface planted of 2,800 hectares reached an average yield of 72 t/ha. 155,000 tonnes were processed into 29,000 tonnes of paste, 25,000 tonnes into 15,000 tonnes of canned tomatoes, with the additional volumes either frozen (12,000 tonnes) or processed mainly into juice or passata.

2019 forecast

In **Argentina**, the current estimation of area to be planted is 6100 ha for a production estimate of 475,000 tonnes.

In **Australia**, planting is now underway. No information on the volumes expected.

In **Peru**, because of the current market conditions, the volume will not be increased and will remain at the same level as last year (100,000 metric tonnes).

WPTC World production estimate of tomatoes for processing

(in 1000 metric tonnes)

Date of last update: 25/10/2018

Hemisphere	Group	Country	2015 FINAL		2016 FINAL		2017 FINAL		2018 PRELIMINARY		AVERAGE 2015-2017	VARIATION 2018 vs 2017
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMIITOM)	Algeria**	500	Mem.	550	Mem.	600	Misc.	500	Est.	550	-17%
		Egypt	250	Est.	350	Misc.	300	Est.	400	Mem.	300	33%
		France	170	Mem.	183	Mem.	195	Mem.	152	Mem.	183	-22%
		Greece	500	Mem.	440	Mem.	400	Mem.	320	Mem.	447	-20%
		Hungary**	105	Est.	105	Est.	100	Misc.	106	Mem.	103	6%
		Iran**	1 350	Mem.	1 150	Mem.	980	Mem.	300	Mem.	1 160	-69%
		Israel	220	Mem.	200	Mem.	200	Mem.	200	Mem.	207	0%
		Italy	5 393	Mem.	5 180	Mem.	5 200	Mem.	4 650	Mem.	5 258	-11%
		Malta**	8	Mem.	8	Mem.	8	Mem.	8	Mem.	8	0%
		Portugal***	1 660	Mem.	1 507	Mem.	1 554	Mem.	1 150	Mem.	1 574	-26%
		Russia**	90	Mem.	145	Mem.	400	Mem.	500	Mem.	212	25%
		Spain***	3 028	Mem.	2 950	Mem.	3 350	Mem.	2 800	Mem.	3 109	-16%
		Syria**	70	Mem.	70	Est.	70	Est.	70	Est.	70	0%
		Tunisia	935	Mem.	650	Mem.	643	Mem.	629	Mem.	743	-2%
		Turkey	2 700	Mem.	2 100	Mem.	1 900	Mem.	1 300	Mem.	2 233	-32%
		Ukraine**	550	Mem.	550	Mem.	650	Mem.	735	Mem.	583	13%
		Subtotal AMITOM	**17 529**		**16 138**		**16 550**		**13 820**		**16 739**	**-16%**
		of which members in EU	**10 864**		**10 373**		**10 807**		**9 186**		**10 681**	**-15,0%**
	OTHER MEMBERS	Brazil	1 300	Mem.	1 450	Mem.	1 450	Mem.	1 400	Mem.	1 400	-3,4%
		Canada	386	Mem.	456	Mem.	426	Mem.	450	Mem.	423	6%
		California	13 025	Off.	11 470	Mem.	9 492	Mem.	11 065	Mem.	11 329	17%
		China	5 600	Mem.	5 150	Mem.	6 200	Mem.	3 800	Mem.	5 650	-39%
		Japan	35	Mem.	33	Mem.	30	Mem.	25	Mem.	33	-17%
		Subtotal Other Members	**20 346**		**18 559**		**17 598**		**16 740**		**18 834**	**-4,9%**
	NON MEMBERS	Bulgaria	60	Misc.	40	Misc.	50	Misc.	50	Est.	50	0%
		Czech Republic	25	Est.	25	Est.	25	Est.	25	Est.	25	0%
		Morocco	130	Est.	130	Est.	130	Est.	130	Est.	130	0%
		Poland	210	Misc.	220	Misc.	200	Misc.	200	Misc.	210	0%
		Slovakia	20	Est.	20	Est.	20	Est.	20	Est.	20	0%
		USA excluding California	350	Misc.	476	Misc.	408	Misc.	410	Misc.	411	0%
		Subtotal Non Members	**795**		**911**		**833**		**835**		**846**	**0,2%**
		Total Northen Hemisphere	**38 670**		**35 608**		**34 981**		**31 395**		**36 420**	**-10,3%**
		of which WPTC members	**37 875**		**34 697**		**34 148**		**30 560**		**35 573**	**-10,5%**
		of which European Union	**11 179**		**10 678**		**11 102**		**9 481**		**10 986**	**-14,6%**
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	535	Mem.	405	Mem.	488	Mem.	435	Mem.	476	-10,9%
		Australia	286	Mem.	275	Mem.	185	Mem.	228	Mem.	249	23,0%
		Chile	850	Mem.	800	Mem.	1 080	Mem.	1 211	Mem.	910	12,1%
		Peru	112	Mem.	100	Mem.	110	Mem.	100	Mem.	107	-9,1%
		South Africa	140	Mem.	145	Mem.	180	Mem.	135	Mem.	155	-25,0%
		Subtotal members	**1 923**		**1 725**		**2 043**		**2 109**		**1 897**	**3,2%**
	NON MEMBERS	Dominican Republic	210	Misc.	210	Est.	220	Est.	258	Misc.	213	17,3%
		India	130	Est.	130	Est.	130	Est.	130	Est.	130	0,0%
		Mexico	40	Misc.	40	Misc.	40	Est.	40	Est.	40	0,0%
		New Zealand	51	Misc.	51	Est.	50	Misc.	50	Est.	51	0,0%
		Senegal	80	Misc.	28	Misc.	53	Misc.	53	Misc.	54	0,0%
		Thailand	260	Est.	260	Est.	260	Est.	260	Est.	260	0,0%
		Venezuela	20	Est.	20	Est.	20	Est.	20	Est.	20	0,0%
		Subtotal non members	**791**		**739**		**773**		**811**		**768**	**4,9%**
		Total Southen Hemisphere	**2 714**		**2 464**		**2 816**		**2 920**		**2 665**	**3,7%**
GENERAL TOTAL			**41 384**		**38 072**		**37 797**		**34 315**		**39 084**	**-9,2%**
of which members of the WPTC			39 798		36 422		36 191		32 669		37 470	-9,7%
WPTC as percentage of total production			96%		96%		96%		95%		96%	-0,6%

Sources:

Mem.= WPTC members, Off.= Official data, Misc.= Other sources (industry contacts, press, ...), Est.= WPTC estimate, in the absence of reliable data

Notes:

*Hemispheres are not defined in the strict geographic sense but as Northern Hemisphere: crop period mainly July to December & Southern Hemisphere: crop period mainly January to June

** AMITOM associate members

*** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:

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