WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 18 May 2018

AMITOM members in the EU

In **France**, the succession of rainy periods is disrupting the planting which is about ten days late in the south-west region and a week in the south-east. This delay should not have any serious incidence and all the surfaces should be planted. The forecast remains 185,000 tonnes.

In **Greece**, the weather conditions in April and early May have generally been good, except for one episode of rain and hail which fortunately affected the tomato fields very little. Transplanting is now finished in the south and will end in a few days in the north where it is already at 95%. The plants are growing well with no diseases and the forecast is maintained at 420,000 tonnes.

In the **North of Italy**, the weather this spring has been unstable with a generally rainy first half of April, a hot second half of the month and low temperature and rains and some hail since the beginning of May in all areas. Consequently, the conditions are not ideal for planting and plant growth and there is concern that this could favour the development of bacterial diseases. About 40% of the surfaces remain to be planted and operations could end in about three weeks if the conditions are good. Due to these conditions the crop could be delayed by one or two weeks. As expected, the surfaces have been reduced overall by 5 to 7% compared with 2017 and the estimate of 2.5 million tonnes is confirmed.

In the **Centre and South of Italy**, the weather situation has been similar and has led to a 7 to 10 days delay in transplanting. The rains have, however, enabled to fill the reservoirs which means there is no more worry about water availability for irrigation this summer. Transplanting is not done in the best conditions but delay could be recovered if the weather conditions are good from now on. The surfaces planted will be reduced by 5 to 10% and the processing intentions are estimated at 2.4 million tonnes, a 5% reduction on 2017's 2.55 million tonnes. The negotiations have just been concluded at the same price as last year of 87 €/t for round tomatoes and 97 €/t for long tomatoes. Processors were hoping to reduce the gap between the two prices, for which there is no serious justification especially as some long tomatoes are used for dicing.

The total estimate for **Italy** therefore stands at 4.9 million tonnes, but will depend on the farm yields.

In **Portugal**, the situation is similar to Spain with planting delays of at least 15 days due to the rains which at least had the favorable impact of filling the water reserves, so there is no more worry about water availability during the summer. The weather has now improved with the temperatures starting to rise. The situation is very complex and not totally clear yet and it is probable that some of the surfaces will not be planted. It is therefore difficult at this stage to make an educated forecast so the last figure of 1.4 million tonnes is kept for the moment. As the harvest will be late, good weather will be needed in September.

The situation is quite complex in **Spain** with soil preparation and transplanting operation seriously affected by the rains in the second half of April and early May, and having to stop and start. Overall, there is a 20 days delay in both Andalucía, where planting has just finished, and in Extremadura where it continues. Similarly, there is a 10 days delay in Navarra. Due to the delay, some seedlings were lost or planted past their best. In Extremadura, it is estimated that the final surface planted could be 5 or 10% lower than initially planned for this crop but this will be confirmed when all is planted. Moreover, some fields in Vegas Altas were affected by hail. Due to the delay in planting, a large proportion of the crop should be harvested in the higher risk period of the second half of September. The estimate, which was in a range of 2.6 to 2.7 million tonnes is now closer to 2.6 million tonnes.

Other AMITOM members

In **Russia**, the draft forecast remains 500,000 tonnes to be processed in 2018 season. No new players, but there are plans to increase the production from the existing factories in KBR and Astrakhan.

In **Turkey**, the forecast numbers have been raised to 1.5 million tonnes. The planting in the south has been completed without any interference and the planting in the north was around 30% through as of 8 May. Some rains last week interrupted the planting for a few days but did cause any damage to already planted surfaces. For anyone who follows the Forex rates they can see that what has changed in the cost of raw material in Euro/USD terms.

In **Ukraine**, the weather has been good, hotter than usual and with no rain since the beginning of May. Consequently, there is no delay in planting operations which should be completed on schedule. Already 50 to 60% of the plants are in the fields. The volume is confirmed at 750,000 tonnes.

Southern hemisphere members

In **Argentina**, the harvest finished before mid-April with 426,000 tonnes processed, from 6,232 ha. The distribution by regions was:

- Mendoza 172,550 t in 2233 ha,
- San Juan 162,360 t in 1959 ha,
- Rio Negro 33,000 t in 450 ha,
- La Rioja 24,000 t in 390 ha,
- NOA 33,000 t in 1200 ha (fresh market by-product).

In **Australia**, the final production was 227, 636 tonnes

In **Chile**, the harvest finished on 1st May, a few days after the original schedule due some rains in the southern area. In general terms, this was a good season with better average yields per hectare than excepted at 96 t/ha. Consequently final production was 1,211,000 tonnes from the 12,550 hectares planted.

In **South Africa**, the harvest season in the north of the country was delayed with about two weeks due to lower temperatures. The harvesting operations were stopped on 14 May due to out of season rain. It is early in the season but the yields per hectare are currently similar to the five year average. The impact of white fly and hawker activity (where informal traders buy product directly from the farm) on the total volume is currently uncertain.
The projection for the crop is currently 165,000 tonnes compared to 180,000 tonnes last year. The main reason for the lower crop is the effect of the drought in the Western Cape where some of the factories have not open due to the unavailability of irrigation water.

Other WPTC countries

In **California**, the majority of the planting should be completed by May 20th with just a small portion to remain after that. So far plant development looks good with fewer disease issues than last year at this time. The official estimate remains at 12.0 million short tons (10.886 million metric tonnes) and a new estimate will be released by NASS on May 31. Price negotiations continue at this time.

In **Canada**, preliminary contract tonnage for Ontario tomato processors is 467,079 short tons (423,727 metric tonnes). Ontario tomato prices for 2018 have not yet been established, as part of the pricing calculation is dependent upon the California price. Spring was late arriving, with unseasonably cold temperatures into the beginning of May however the weather is finally cooperating and temperatures getting warmer.

In **China**, transplanting started mid-April in Xinjiang and has now finished. The weather has been normal, except for a cold spell and some snow in Northern Xinjiang around 7 May, but the latest information is that it had little impact on the seedlings already planted. The surfaces have been reduced by the growers and the variety selection adjusted.
The weather of Inner Mongolia is good, and the temperature raise early. Thus the transplanting is 7 days in advance compared with other years. According to latest research, a total surface of around 154,000 Mu (10,268 hectares) will be planted. This is 5% lower than 2017, and a little higher than the early estimation in March.
The estimate regarding the total surface planted in China remains 630,000 mu (42,000 hectares), which could mean a production of between 4.1 and 4.4 million tonnes, based on last year's yields.

In **Brazil**, the surfaced planted remains estimated at 16,558 ha, which with a yield of 85 t/ha would bring a total production of 1,407,430 tonnes.

In **Japan**, the crop update for 2018 remains 32,000 tonnes from 450 hectares.

Non-member countries

The **US Midwest** finds itself with a mixed bag of weather with a line of demarcation running west to east about half way through the growing area. The area south of this line has experienced a tremendous start to the season, good temperatures, good planting conditions and just enough rain to get things off to a good start. The northern part of the area has experienced consistent rain events and are behind in planting and have been very cool, sometimes as many as 30 °F different between north and south.

WPTC World production estimate of tomatoes for processing
(in 1000 metric tonnes)

Date of last update: 18/05/2018

Hemisphere	Group	Country	2015 FINAL		2016 FINAL		2017 FINAL		2018 FORECAST		AVERAGE 2015-2017	VARIATION 2018 vs 2017
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMIITOM)	Algeria**	500	Mem.	550	Mem.	600	Misc.	600	Est.	550	0%
		Egypt	250	Est.	350	Misc.	300	Est.	300	Est.	300	0%
		France	170	Mem.	183	Mem.	195	Mem.	185	Mem.	183	-5%
		Greece	500	Mem.	440	Mem.	400	Mem.	420	Mem.	447	5%
		Iran**	1 350	Mem.	1 150	Mem.	980	Mem.	1 600	Mem.	1 160	63%
		Israel	220	Mem.	200	Mem.	200	Mem.	200	Mem.	207	0%
		Italy	5 393	Mem.	5 180	Mem.	5 200	Mem.	4 900	Mem.	5 258	-6%
		Malta**	8	Mem.	8	Mem.	8	Mem.	8	Mem.	8	0%
		Portugal***	1 660	Mem.	1 507	Mem.	1 554	Mem.	1 400	Mem.	1 574	-10%
		Russia**	90	Mem.	145	Mem.	400	Mem.	500	Mem.	212	25%
		Spain***	3 028	Mem.	2 950	Mem.	3 350	Mem.	2 600	Mem.	3 109	-22%
		Syria**	70	Mem.	70	Est.	70	Est.	70	Est.	70	0%
		Tunisia	935	Mem.	650	Mem.	643	Mem.	730	Mem.	743	14%
		Turkey	2 700	Mem.	2 100	Mem.	1 900	Mem.	1 500	Mem.	2 233	-21%
		Ukraine**	550	Mem.	550	Mem.	650	Mem.	750	Mem.	583	15%
		Subtotal AMITOM	**17 424**		**16 033**		**16 450**		**15 763**		**16 636**	**-4%**
		of which members in EU	**10 759**		**10 268**		**10 707**		**9 513**		**10 578**	**-11,2%**
	OTHER MEMBERS	Brazil	1 300	Mem.	1 450	Mem.	1 450	Mem.	1 407	Mem.	1 400	-3,0%
		Canada	386	Mem.	456	Mem.	426	Mem.	424	Mem.	423	0%
		California	13 025	Off.	11 470	Mem.	9 492	Mem.	10 886	Mem.	11 329	15%
		China	5 600	Mem.	5 150	Mem.	6 200	Mem.	4 100	Mem.	5 650	-34%
		Japan	35	Mem.	33	Mem.	30	Mem.	32	Mem.	33	7%
		Subtotal Other Members	**20 346**		**18 559**		**17 598**		**16 849**		**18 834**	**-4,3%**
	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%
		Hungary	105	Est.	105	Est.	100	Misc.	125	Misc.	103	25%
		Morocco	130	Est.	130	Est.	130	Est.	130	Est.	130	0%
		Poland	210	Misc.	220	Misc.	200	Misc.	170	Misc.	210	-15%
		Slovakia	20	Est.	20	Est.	20	Est.	20	Est.	20	0%
		USA excluding California	350	Misc.	476	Misc.	408	Misc.	450	Misc.	411	10%
		Subtotal Non Members	**900**		**1 016**		**933**		**970**		**950**	**4,0%**
		Total Northen Hemisphere	**38 670**		**35 608**		**34 981**		**33 582**		**36 420**	**-4,0%**
		of which WPTC members	**37 770**		**34 592**		**34 048**		**32 612**		**35 470**	**-4,2%**
		of which European Union	**11 179**		**10 678**		**11 102**		**9 903**		**10 986**	**-10,8%**
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	535	Mem.	405	Mem.	488	Mem.	426	Mem.	476	-12,7%
		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.	165	Mem.	155	-8,3%
		Subtotal members	**1 923**		**1 725**		**2 043**		**2 130**		**1 897**	**4,2%**
	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.	80	Misc.	54	50,9%
		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**		**838**		**768**	**8,4%**
		Total Southen Hemisphere	**2 714**		**2 464**		**2 816**		**2 968**		**2 665**	**5,4%**
GENERAL TOTAL			**41 384**		**38 072**		**37 797**		**36 550**		**39 084**	**-3,3%**
of which members of the WPTC			39 693		36 317		36 091		34 742		37 367	-3,7%
WPTC as percentage of total production			96%		95%		95%		95%		96%	-0,5%

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

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