



WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 21 October 2021

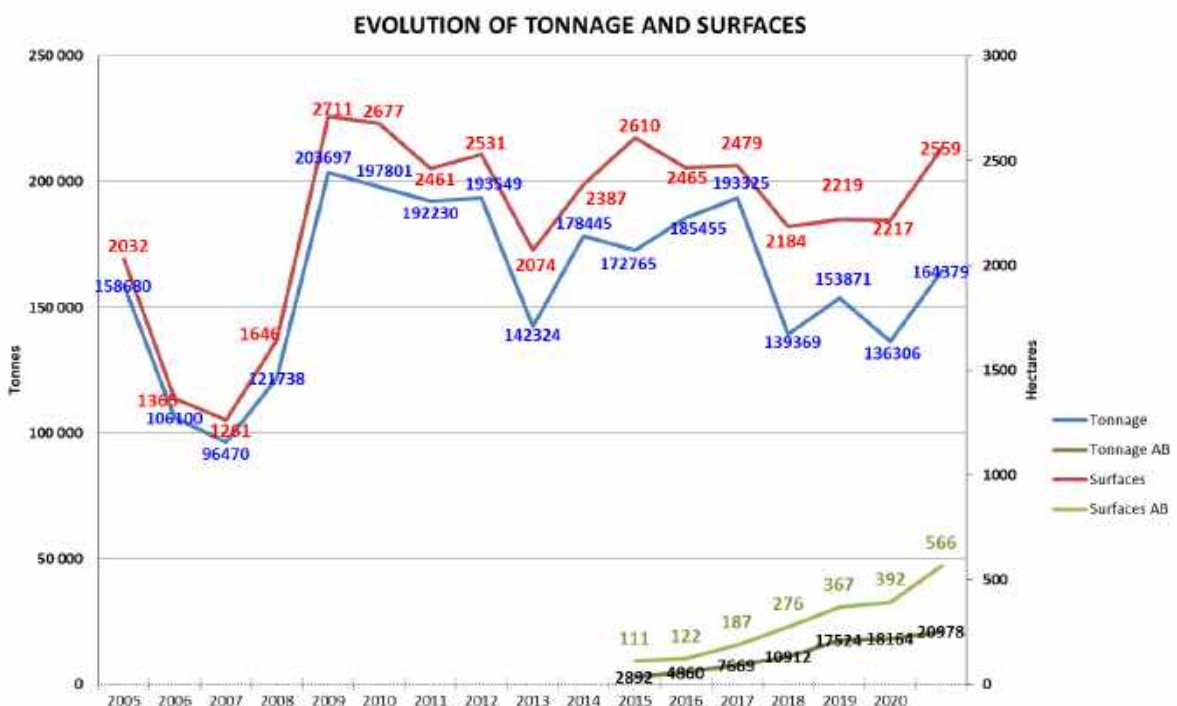
AMITOM countries

Egypt

Tomato processing takes place over nearly 300 days of the year, and it is expected that 440,000 tonnes will be harvested in total in 2021. Quality and yields have been good during the summer season which finished in September. The winter season with tomatoes from the Nile area started at the middle of October.

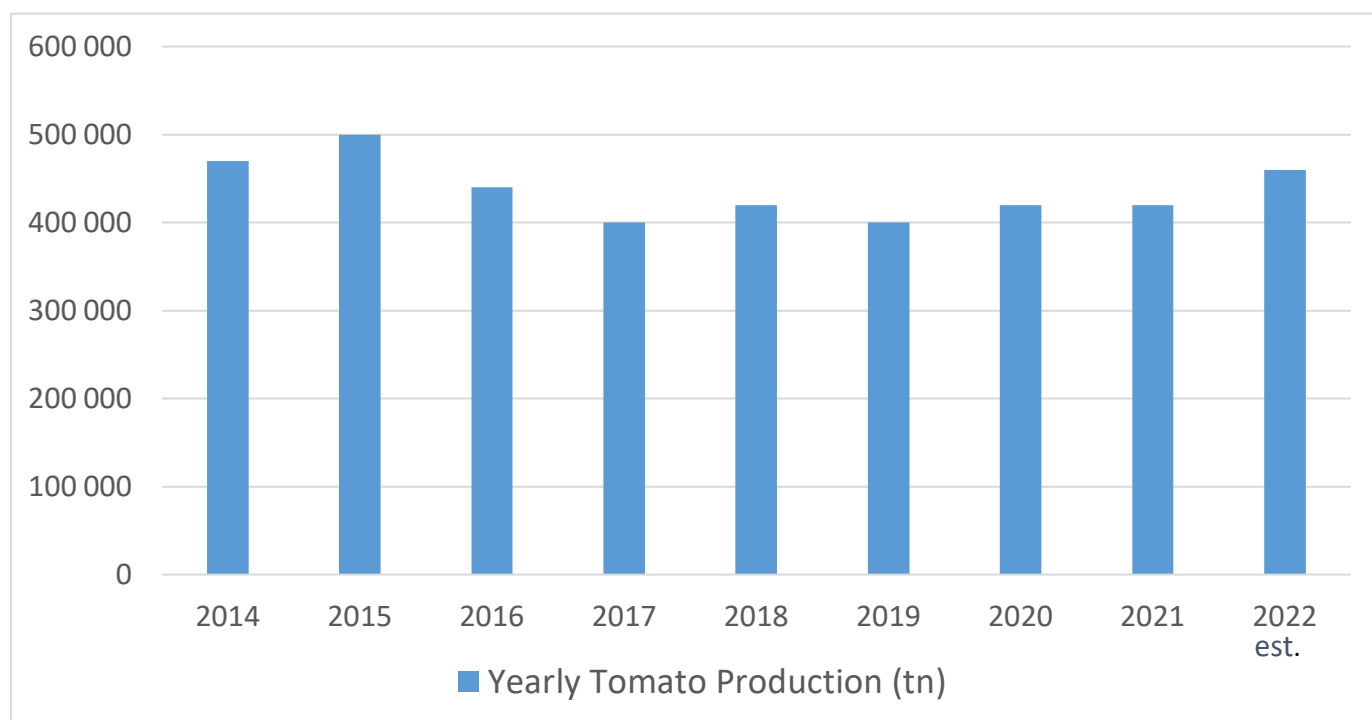
France

With a final volume processed of 164,000 tonnes, the initial forecast of 185,000 tonnes was not reached (90% of the target). The reduction was notable for the organic crop for which production which only reached 80% of the target (20 978 tonnes when 26,000 tonnes were expected). Most of the losses were due to bad weather in the south-west region, where the weather was often cool and very wet, with a total rainfall of 500 mm during the season. The south-east had a good season although processing was also totally stopped during a full week in September due to rain. Planted surfaces were raised to 2,559 hectares this year from 2,217 ha in 2020, and organic surfaces from 392 to 566 hectares.



Greece

Although the 2021 season started well, final production is 9 % lower than the initial forecast of 460,000 tonnes to only 420,000 tonnes. Some transplants were lost in April due to frost. June and July were the hottest in the last ten years with very high night temperatures, and two heatwaves in July and August with temperatures of up to 45°C resulted in loss of flowers, softening of fruits and loss of yield. The early outlook for 2022 is to process the 460,000 tonnes targeted for this year.



Hungary

The harvest finished at the end of September with a final volume processed of 115,000 tonnes, higher than the initial estimate of 100,000 tonnes. The good end of season enabled to recover the losses on the early crop. Fruit quality was good with an average brix of 5, the highest in the last few years, and the average farm yield 79 t/ha from the 1,450 hectares planted. Farmer's profitability is low and other crops (notably corn) are more attractive for growers who also face rapidly raising input material costs so further raw tomato price increases are expected for 2022.

Italy

The final production is higher than earlier estimates at 6.05 million tonnes from 71,217 hectares. The increase is largely due to a very good season in the north, where production reached 3.09 million tonnes, more than the volumes of the contracts, which never happened before. The weather was good, despite some localised hailstorms. Average farm yield from the 38,621 hectares planted was just over 80 t/ha. Average brix was 4.88. The second half of the crop was particularly good.

In the south, after a bad 2020 crop, this was also a very good season and probably the best in last ten years years with an average of 90.87 t/ha from 32,596 hectares, for a final production of 2.96 million tonnes. The only issues were in Caserta early in the season with low temperatures. In Puglia, there was enough water in the Ochito reservoir, so the region achieved very good yield per hectare. Fruit quality was very good, with high brix and good factory yields.

Consegnato Italia 2021



6,05 Milioni Tonnellate

di pomodoro trasformato in Italia per

71.217 ha messi a coltura

resa media **84,98 t/ha**

Bacino Centro Sud

2,96 Milioni Tonnellate*

per **32.596 ha** messi a coltura

resa media **90,87 t/ha**

*data provvisorio

Bacino Nord

3,09 Milioni Tonnellate

per **38.621 ha** messi a coltura

resa media **80,01 t/ha**



Portugal

The official productions figures are not yet available but final production is estimated at 1.596 million tonnes with an average field yield estimated at 103 t/ha. Altogether it was a very nice crop with good quality and colour, with an average brix of 5.1. There were no major issues with the weather throughout the season.

Russia

Final production was 523,000 tonnes versus an initial forecast of 550,000 tonnes. Average yield was 90 t/ha and quality was good with an average brix over 4.5.

Spain

There were uncertainties at the start of the season as price negotiations were tough after a bad campaign in 2020, and farmers received only a 40% water allocation in Andalusia. In the end, it is estimated that the price of raw materials increased by +11% on average and more surfaces than expected were planted. During the season, the weather was nice in July and August, producing high yields and good quality and colour. Later, there were several episodes of heavy rains in September in all regions. This led to a complex end of campaign with many days when farmers were not able to harvest, and some tomato left on the fields. In the north, there were severe blight attacks after the rains which caused considerable damages, and an estimated 15% of losses. The last factories are now closing in the north. It is currently estimated that 3.185 million tonnes of tomatoes were processed in Spain.

The perspective for 2022 will depend on rainfall during the winter, especially in Andalusia where high volumes of rains are needed for farmers to get their water allocation. The sharp rise of suppliers' prices

(Energy, packaging, etc.) is also a concern. It is therefore too soon to give an estimate, but a similar volume is currently foreseen (3.1 million tonnes).

Spain 2021 Estimated results

Including tomato grown in Portugal and processed in Spain

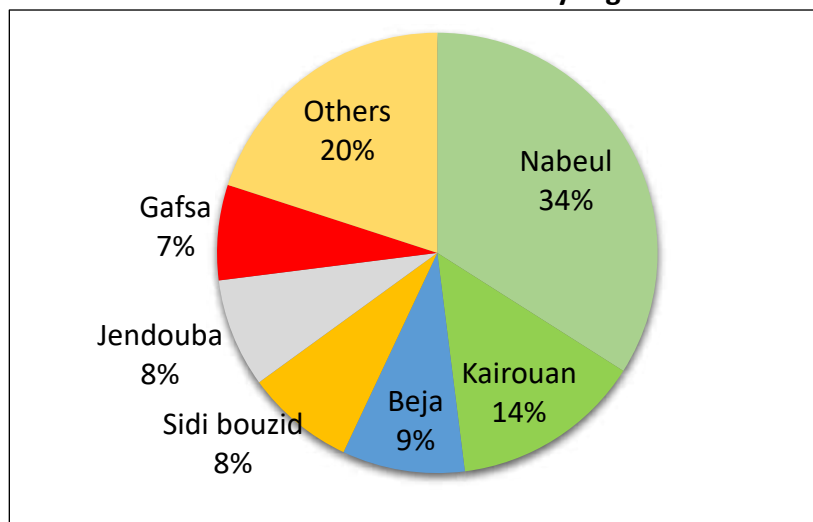
	2020	2021	21 vs 20
Surface (ha)	32.950	34.100	3%
Production (MT)	2.620.000	3.185.000	22%
Average yield (MT/ha)	80	93	17%

Tunisia

A total surface of 17,000 hectares was planted with tomatoes in 2021, up from 16,500 hectares in 2020, but farm yields dropped 15% due to a heatwave from 10 June to end August to an average of 63 t/ha (75 t/ha in 2020), so total production was 1.1 million tonnes. Some tomatoes were as usual sold on the fresh market and the volume processed in 25 factories with total daily capacity of 36,000 tonnes of fresh tomatoes was 938,000 tonnes, of which 926,000 tonnes to produce double concentrate and 12,000 tonnes to produce canned tomatoes.

The total volume of double concentrate produced was 138,000 tonnes, nearly all directly into cans, and 7,000 tonnes of canned tomatoes.

Distribution of the surfaces by region



Turkey

It was a long season. In the south, the very hot weather caused some loss of tonnage at the start of the season. The harvest has now finished with a final volume estimated at 2.2 million tonnes.

Ukraine

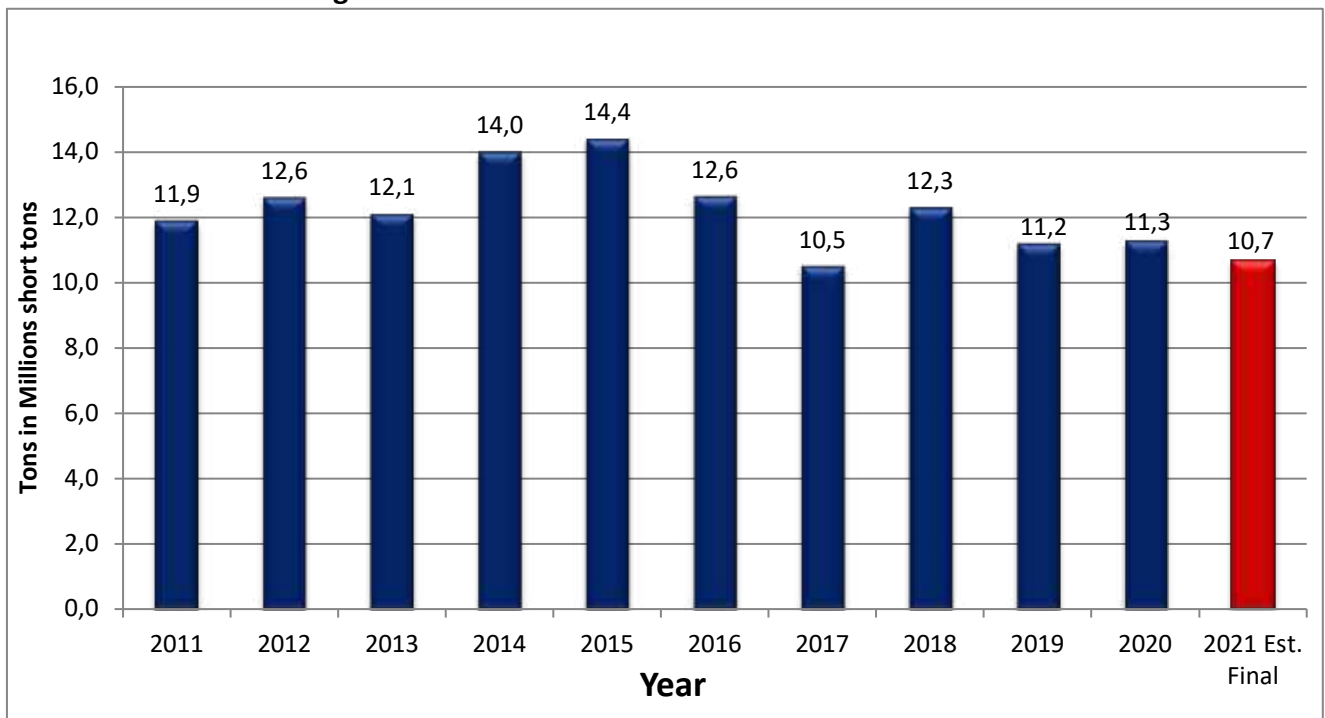
Processing is not yet finished and most likely will not achieve 820,000 tonnes, but hopefully 800,000 tonnes, versus an initial forecast of 850,000 tonnes. Quality is average.

Other countries in the Northern hemisphere

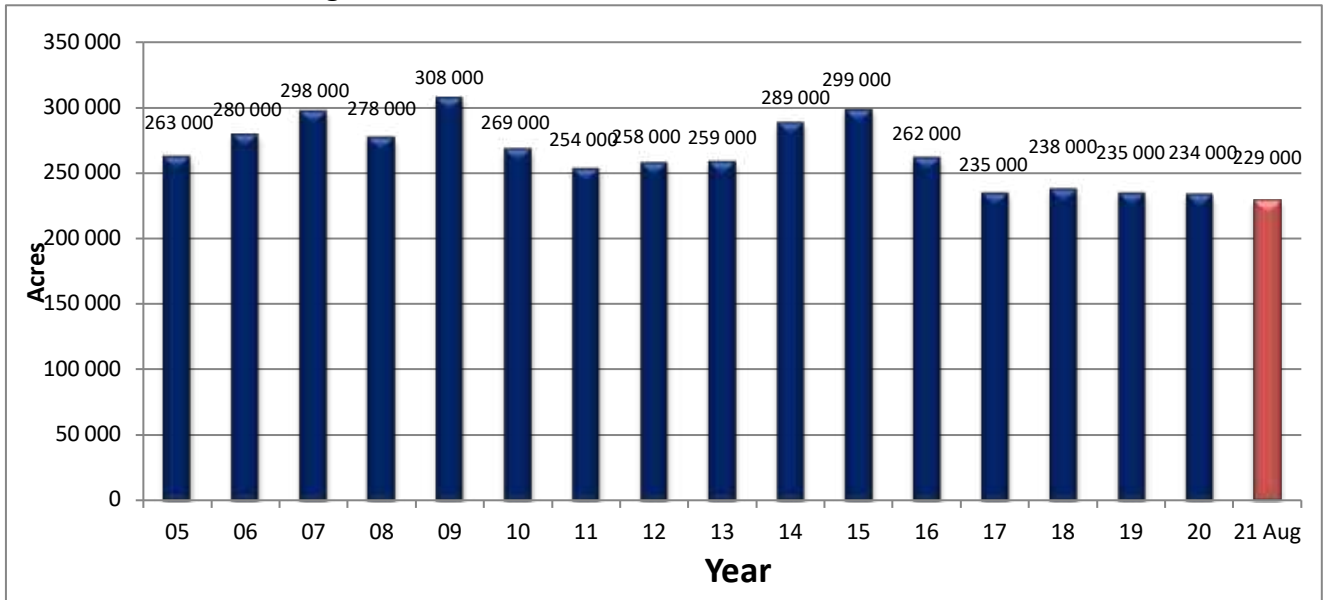
California

2021: Weather, disease and water! The original January estimate was for 12.1 million short tons (10.97 million metric tonnes), but it was reduced to 11.6 million short tons (10.523 million metric tonnes) in May mainly due to issues with water. In the south most growers had to rely exclusively on well water. The surface was expected to be 240,000 acres in January but only 229,000 acres were planted. A very warm spring, some disease pressure, and hot weather in the summer further reduced the size of the crop and the August estimate was 11.1 million tonnes (10.07 million metric tonnes). The harvest will trickle until first part of November for a couple of processors but a total of only 10.7 million short tons (9.65 million metric tonnes) is now expected. The average yield was 46.73 tons per acre (116,8 t/ha), better up north than in the centre and in the south were 60% of tonnage are normally grown. For 2022, water is going to be the big issue. Some rain is currently forecast in the north but biblical levels are needed this winter to fill the reservoirs which are currently very low. One of the issues is also the shift of one million acre from row to permanent crops between 2010 to 2020: these fields are given priority for water over annual crops like tomatoes.

California Tomato Tonnage Trends



California Tomato Acreage Trends



Canada

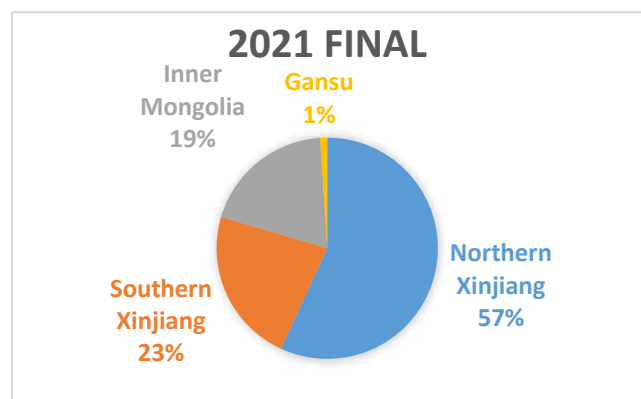
The forecast was 541,000 short tons (450,000 metric tonnes), an increase from 2020. The season sounded promising but ended disappointing. It started well but excess rain and heat led to significant losses in some areas due to flooding and diseases, so the total crop ended at 85% of target at 478,000 short tons (433,000 metric tonnes), close to 2020 final production. Yields were down from historical levels but fruit quality was generally good, in terms of solids and colour. A higher contract volume is expected in 2022.

China

In 2021, the volume processed was 4.8 million metric tonnes, the same as the forecast. The number of factories was basically the same as that for the 2020 crop, but raw materials has been reduced by 1 million tonnes and because of the competition for raw materials, the price of tomatoes increased by 10 to 15%. Due to the low temperatures, the transplanting was delayed by 5-7 days. The weather during the harvest period was basically normal. There was no obvious processing peak during the crop, and the whole crop is relatively stable. Due to climate reasons and harvest of many immature fruits as processors were competing to get tomatoes, the quality of products is slightly lower than that in 2020, especially colour and Bostwick.

The distribution of the production by region was as follows:

- 2.73 million tonnes in Northern Xinjiang
- 1.09 million tonnes in Southern Xinjiang
- 50,000 tonnes in Gansu
- 0.93 million tonnes in Inner Mongolia



The supply will be tight this year and a number of factors should lead to a price increase next year (cost of freight, of packaging, of energy, covid, exchange rate, ...).

Japan

A total volume of 30,000 tonnes was processed in 2021.

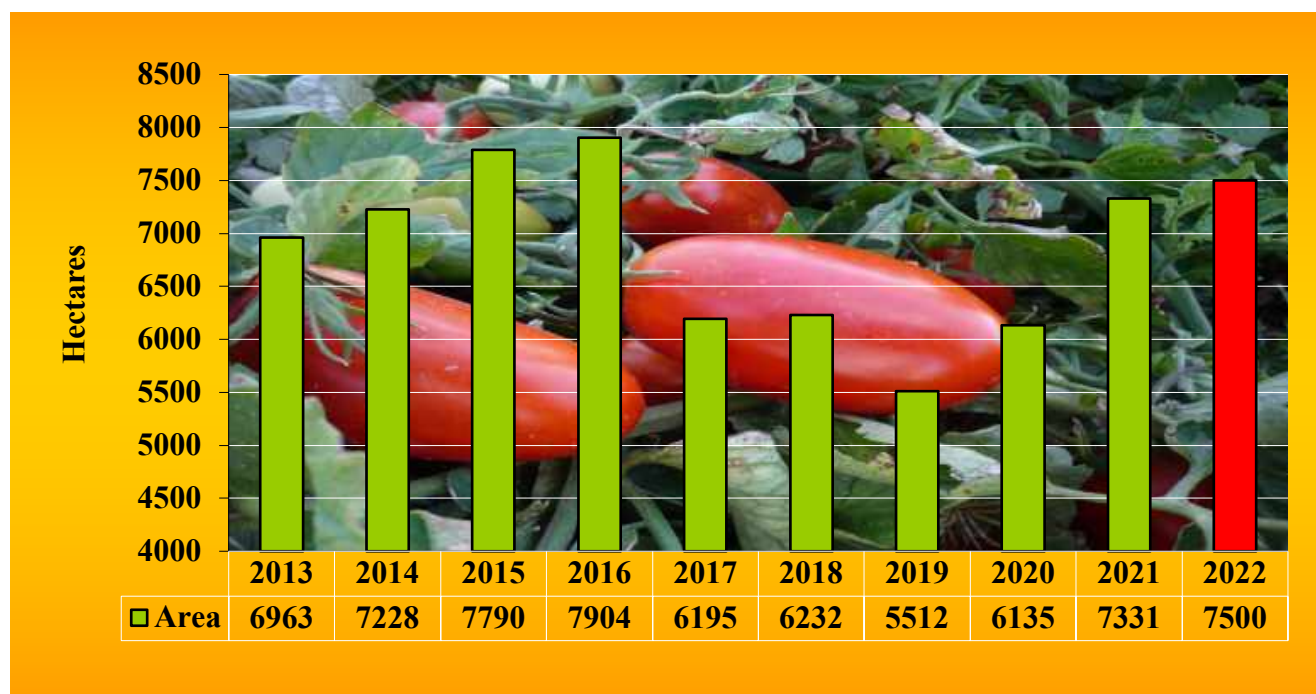
USA Midwest

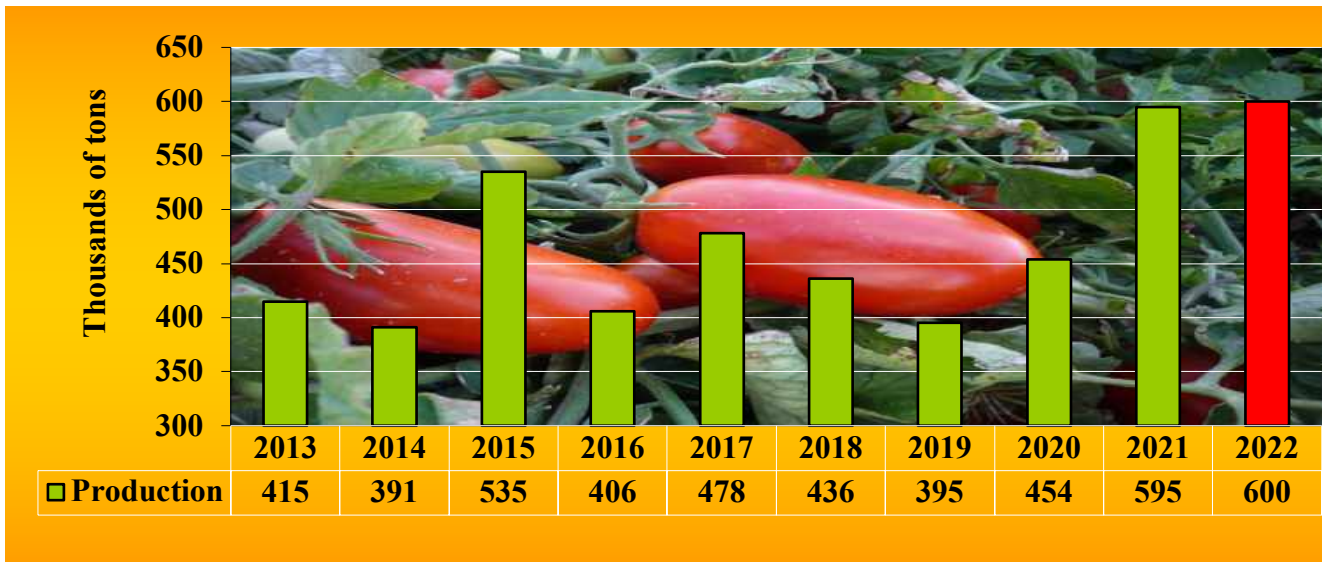
Shortly after pack started it became clear part of the Midwest would harvest more tomatoes than forecasted. The 2021 fresh pack will be remembered as one of the highest tonnage packs in recent years as growers were able to harvest record yields along with high fruit quality most of pack. This continued to develop over pack to surpass the pre-pack tonnage projection to an estimated 462,000 metric tonnes (510,000 short tons). This tonnage increase was good to overcome the acreage lost to hurricane IDA. Processors worked together to help growers bring in their whole crop to account for the areas that were short. This also meant there was a search for additional warehouse space, cans, bottles, and of course lids. Temperatures remained favourable throughout pack, although there were challenging periods, and notably rain and a great amount of mud towards the end of pack. Growers overcame these conditions to harvest their final loads of tomatoes, at times hooking tractors to each other and even pushing trailers with large tractors to manoeuvre through muddy conditions.

Southern hemisphere

Argentina

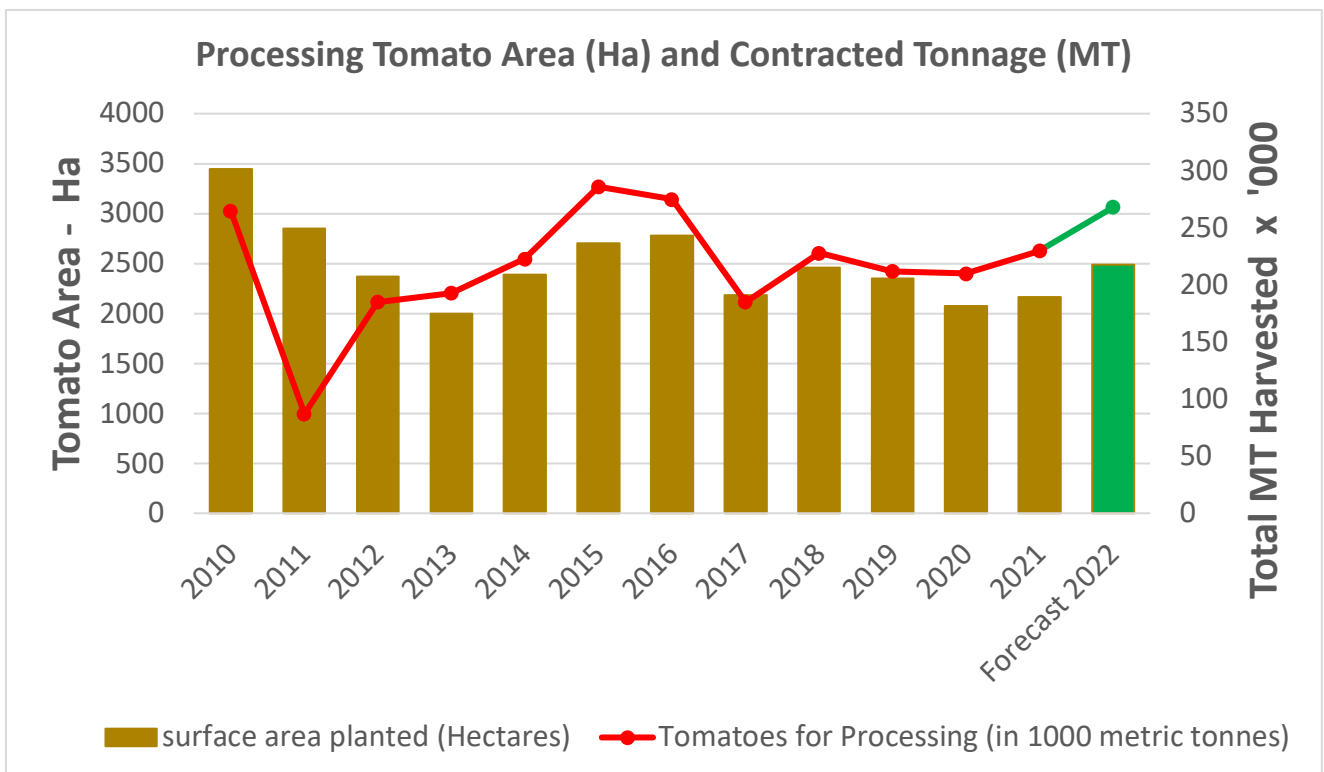
For the 2022 season, 7,500 hectares should be planted, up from 7,331 hectares in 2021, an increase of 5 to 7 % mainly in the San Juan region. Total production should reach 600,000 tonnes, which would be a record, but not enough to cover the domestic consumption estimated at 750,000 tonnes, so 20,000 to 22,000 tonnes of paste will still need to be imported, mainly from Chile. About 40% of the surfaces have been planted to date, with a small delay due to some frosts affecting nurseries a couple of weeks ago. La Nina continues and a dry summer is expected, and shortage of water are possible mainly in San Juan although most of the surfaces are drip irrigated.





Australia

The forecast for 2022 is 2,488 hectares and 267,974 metric tonnes, including 3,000 tonnes of organic tomatoes and 280 tonnes of cherry tomatoes. There is good water availability for the season. About 1000 hectares have been planted to date. Rain has delayed planting for up to ten days for some growers but also assisted the establishment of transplants on some lighter soils. Growers preparing for potentially higher disease pressure.



Chile

The main issue for the coming season is the water availability, and some regions are under an emergency drought order. The surface equipped for drip irrigation has increased again and now represents about 90% of the tomato fields. The surfaces planted will be reduced by about 10% and the current forecast is 1.05 million metric tonnes, versus the 1.13 million tonnes processed in 2021.

South Africa

A total of 125,000 tonnes fresh tomatoes was processed with a volume of 40,000 tonnes, as forecast during the summer season (January to April) and 85,000 tonnes during the winter season (May to September), 15% below forecast as the Musina area had tomato damage due to excessive rainfall and White Fly infestation. One processor did not contract pre-season and bought all tomatoes on the spot market. A total of 140,000 tonnes is expected in 2022 (Summer season: 40,000 tonnes & Winter season: 100,000 tonnes).



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

Date of last update: 21/10/2021

		2019		2020		2021		AVERAGE	VARIATION	
		FINAL		FINAL		PRELIMINARY		2018-2020	2021 vs 2020	
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Algeria**	800	Mem.	800	Misc.	820	Misc.	700	3%
		Egypt	400	Mem.	420	Mem.	440	Mem.	407	5%
		France	154	Mem.	136	Mem.	164	Mem.	143	21%
		Greece	400	Mem.	420	Mem.	420	Mem.	380	0%
		Hungary**	100	Mem.	82	Mem.	115	Mem.	96	40%
		Iran**	1 650	Mem.	1 300	Mem.	1 300	Est.	1 233	0%
		Israel	200	Mem.	200	Mem.	200	Est.	200	0%
		Italy	4 801	Mem.	5 166	Mem.	6 050	Mem.	4 872	17%
		Malta**	8	Est.	8	Est.	8	Est.	8	0%
		Portugal***	1 410	Mem.	1 262	Mem.	1 596	Mem.	1 290	26%
		Russia**	552	Mem.	515	Mem.	523	Mem.	521	2%
		Spain***	3 200	Mem.	2 650	Mem.	3 185	Mem.	2 883	20%
		Syria**	42	Mem.	42	Est.	40	Est.	42	-5%
		Tunisia	815	Mem.	961	Mem.	938	Mem.	798	-2%
		Turkey	2 200	Mem.	2 500	Mem.	2 200	Mem.	2 000	-12%
Ukraine**	720	Mem.	800	Mem.	800	Mem.	752	0%		
Subtotal AMITOM		17 452		17 262		18 799		16 078	8%	
of which members in EU		10 073		9 724		11 538		10 033	16%	
OTHER MEMBERS	Brazil	1 200	Mem.	1 421	Mem.	1 350	Mem.	1 340	-5,0%	
	Canada	434	Mem.	438	Mem.	433	Mem.	441	-1%	
	California	10 144	Mem.	10 258	Mem.	9 650	Mem.	10 513	-6%	
	China	4 600	Mem.	5 800	Mem.	4 800	Mem.	4 733	-17%	
	Japan	27	Mem.	23	Mem.	30	Mem.	26	30%	
	Subtotal Other Members	16 405		17 940		16 263		17 054	-9,3%	
NON MEMBERS	Bulgaria	40	Misc.	40	Est.	40	Est.	37	0%	
	Czech Republic	25	Misc.	25	Est.	25	Est.	25	0%	
	Morocco	130	Est.	100	Misc.	100	Est.	120	0%	
	Poland	175	Misc.	175	Est.	175	Est.	183	0%	
	Slovakia	20	Est.	20	Est.	20	Est.	20	0%	
	USA excluding California	370	Misc.	463	Misc.	462	Misc.	414	0%	
Subtotal Non Members	760		823		822		799	0%		
Total Northern Hemisphere		34 617		36 025		35 884		34 178	-0,4%	
of which WPTC members		33 857		35 202		35 062		33 378	-0,4%	
of which European Union		10 333		9 984		11 798		9 937	18,2%	
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	395	Mem.	454	Mem.	595	Mem.	437	31,1%
		Australia	212	Mem.	210	Mem.	230	Mem.	208	9,5%
		Chile	1 100	Mem.	907	Mem.	1 174	Mem.	1 130	29,4%
		Peru	100	Mem.	100	Mem.	120	Mem.	103	20,0%
		South Africa	140	Mem.	150	Mem.	125	Mem.	152	-16,7%
	Subtotal members		1 947		1 821		2 244		1 956	23,2%
	NON MEMBERS	Dominican Republic	258	Est.	181	Misc.	227	Misc.	232	25,4%
		India	154	Misc.	152	Misc.	155	Misc.	150	2,0%
		Mexico	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	50	Est.	50	Est.	50	Est.	50	0,0%
		Senegal	77	Misc.	73	Misc.	73	Est.	68	0,0%
		Thailand	43	Misc.	40	Misc.	40	Misc.	42	0,0%
Venezuela		20	Est.	20	Est.	20	Est.	20	0,0%	
Subtotal non members	642		556		605		601	8,8%		
Total Southern Hemisphere		2 589		2 377		2 849		2 558	19,9%	
GENERAL TOTAL		37 206		38 402		38 733		36 735	0,9%	
of which members of the WPTC		35 804		37 023		37 306		35 335	0,8%	
WPTC as percentage of total production		96%		96%		96%		96%	-0,1%	

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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