



WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 25 October 2022

AMITOM countries

Egypt

The expectation is that the forecast of about 440,000 tonnes will be achieved. The Nili crop has just finished, and the winter crop will run from November to January. Quality has been good all year with an excellent crop.

France

The 2022 season will be remembered as the smallest and shortest season to date, with only 142,000 tonnes processed out of the 164,000 tonnes contracted (87%). While after several difficult seasons in the south-west, 2022 was a good year in the region, it was not a case in the south-east where the heatwaves affected yields. A total of 116,000 tonnes were processed in conventional with an average yield of only 70 t/ha (83% of forecast) with 25,000 tonnes of organic production (116% of forecast) with an average yield of 60 t/ha. Average brix was 4.87.

Greece

2022 was one of the worst years as processors could not get all the surfaces they wanted due to the competitiveness of alternative crops, with low farm yields in August and September further reducing production. Consequently, whereas processors intentions were 420,000 tonnes, the same as 2021 final production, the forecast was gradually reduced throughout the season from 380,000 tonnes when planting was finalized to the 340,000 tonnes final result. There is only a very small organic volume processed.

Hungary

While harvesting lasted from 1st August to 3rd October, factories only ran for a total of 35 days as they had to stop and start due to rains. Consequently only 80,000 tonnes out of the expected 100,000 tonnes were processed. Average brix was at a record high of 5.08 but the colour was not so good. Growers earned less than expected and will ask for a large price increase for 2023. The devaluation of the Hungarian Forints mean tat while price of 105 euro/t (130 euro/ton delivered) when negotiated equated 90 euro/t (110 euro/t delivered) at the end of the season. There is no organic production in Hungary.

Italy

A couple of factories are still running in the south but about 5.48 million tonnes of tomatoes will be processed in Italy, a reduction of 10% compared to last year's record results. A total of 65,180 hectares were planted (-8.5% compared to 2021), of which 37,024 in the North and 28,156 in the Centre-South.

In the North, the final volume was 2.885 million tonnes (-6.3% compared to last year). While the early part of the harvest was bad until mid-August, due to the drought and the high temperatures that caused quite a few difficulties, the later rains helped improve the end of the season to exceed the initial forecast. Average yield was 78t/ha, higher than the 5-year average but lower than in 2021, with an average brix of 4.85.

In the Centre-South, the companies processed 2.59 million tonnes, less than the 2.65 million tonnes expected and a decrease of 12% compared to 2021. On the industrial yield front, there was a deterioration with the need to use larger quantities of raw material to be able to guarantee our high-quality standards. A large quantity of the volume went into HORECA size products as socks were very low and there was high market demand. Approximately 11% of the crop in the North and 6% in the South is organic.

Portugal

Following a range of issues during the crop and particularly heat and rains yields were lower than usual at 89 t/ha on average and the total production only 1.33 million tonnes when 1.45 million tonnes were expected. Brix levels reduced after the September rains. It is estimated that about 7,000 tonnes of tomatoes were organic.

Russia

The total volume processed was 638,000 tonnes, versus an initial forecast of 600,000 tonnes. The demand has greatly exceeded supply. More surface than expected was planted. Two factories in Astrakhan and Nalchik are still running for a couple more days. Quality is average, with not the best color as processors are trying to use all the tomatoes available. The difficulties experienced this year due to sanctions against the country could make the situation even worse for next crop.

Spain

This was a difficult season marked by the weather: lack of water reduced the surfaces planted, a very hot July with many days above 40°C led to flower abortions, two episodes of rain in September stopped the factories intermittently. Whereas the forecast at the start of the season was reduced by 25% to 2.5 million tonnes due to a lack of water, it ended with a 33% reduction to 2.1 million tonnes. Average yields were only 85 t/ha in 2022, after 95 t/ha in 2021. There are no figures available yet regarding to the volume of organic tomatoes processed.

Tunisia

The 2022 processing season mostly finished at the start of September with a total volume processed of only about 610,000 tonnes, when the initial forecast was 850,000 tonnes. This reduction is due to reduced surfaces planted (12,671 hectares) and reduced yields this season. A total of 94,000 tonnes of 28/30 paste was produced.

Turkey

The final production is estimated at 2.35 million tonnes from early expectations of 2.1 million tonnes. There is a small production of organic but no official figures. The surfaces planted in the south were reduced due to competing crops, especially cotton, so it was a short crop in the region, but higher than usual surfaces were planted in the Konya region where the season ended late.

Ukraine

This year Odessa region is the major tomato growing and processing area since the Kherson region has been occupied since March and the Mykolaiv region turned into a battlefield. Processing started in the middle of August and will last till 4 November. A total of 120,000 tonnes should be processed with an average brix of 4,5.

Other countries in the Northern Hemisphere

California

Harvesting should end in about ten days with a total volume of about 9.5 million metric tonnes (10.5 million short tons), maybe a little more. Out of this about 526,000 metric tonnes (580,000 short tons) are organic. It was a very tough and disappointing year which started with difficulties in getting the surfaces requested by the processors (229,000 acres finally planted, 92,600 hectares). The weather was extreme with an alternance of high heat, cold and rain throughout the season which made it hard for growers and processors. Yields averaged 95 t/ha or 46 short tons per acre (45 st/acre in 2021) and seem to be trending flat to down which may be due to a variety of factors including the reliance on well water due to surface water shortage, but also late planting and some new growers getting established.

China

In 2022, China's total processing volume is estimated to be 6.2 million tonnes, up from earlier expectations of 5.8 million tonnes. This includes 3.68 million tonnes in Northern Xinjiang, 1.36 million tonnes in southern Xinjiang, 0.06 million tonnes in Gansu and 1.1 million tons in Inner Mongolia. There is no organic production. The harvest finished at the end of September which was very cold. Yields were good this year with a range of 110 to 155 t/ha and an average of 130 t/ha. Processing tomatoes are now 21% more expensive than the average of the last three crops at about 78 USD/t but still the lowest among the major production areas. The profits of tomato farmers is stable so the relationship between farmers and processors is more sustainable.

Japan

The harvest will finish at the end of October, and is expected to be 27,000 tonnes, but the final quantity will be confirmed in early December.

WPTC countries in the Southern Hemisphere

Argentina

The 2022 crop finished in May was a very good crop despite some rains with a record total volume of 325,500 tonnes. The average yield in the country was 82 t/ha and there is no organic production. Despite some rains during the harvest, yields in Mendoza were up from 67 t/ha to 72 t/ha mainly due to the installation of drip irrigation, not widespread in the region until now contrarily to San Juan where it is established.

The production is steadily increasing every year and the forecast for 2023 is 665,000 tonnes with some small increase in the surface to be planted and more drip irrigation in Mendoza. About 50% of the planting has been done to date.

Australia

The 2022 processing tomato season finished in the second week of May 2022 and saw a total delivery of 227,214 tonnes payable tonnes to processors, with 3,900 tonnes of organic tomatoes and 357 tonnes of cherry tomatoes. This is about the same as the volume processed in 2021 but much lower than the 256,780 tonnes contracted from 2,479 hectares, as average yields were 99.1 t/ha (106 t/ha in 2022). The early season was disrupted by multiple rain events, resulting in delays for growers by the end of planting. Cool weather in November and December delayed plant maturity for the early part of the season and adding to this, heavy rainfall near the end of January meant that harvest began slightly later than planned, in early February, with further rain in mid April leaving some fields unharvested. The lack of labour also created a challenge and slowed harvest operations.

The expectation is for 241,000 tonnes to be processed in 2023 including 15,000 tonnes of organic. However, the heavy rains and current flooding will cause some big delays in planting so the forecast will be revised by the end of November.

Chile

The final production in 2022 was 971.000 tonnes, a reduction from the initial forecast of 1.05 million tonnes from 10,500 hectares and the 2021 production of 1.174 million tonnes from 12,230 hectares. The initial worry for the 2022 season was water availability with some regions under an emergency drought order, so the surfaces planted were reduced. After a good start of the season, it was in fact mainly because of heavy rain in the middle of April that final production did not reach the forecast. Fruit quality was however good with good brix.

Transplanting operation are now ongoing for the 2023 season with a total surface of 12,900 ha expected to be planted by early December for a total production forecast of 1.3 million tonnes. The winter was good with more snow so there is no concern over water availability, so all operators are optimistic for a good season.

Peru

The final 2022 production was 125,000 tonnes, up from 120,000 tonnes in 2021, and in line with the program. The 2022/23 season started mid October and will finish mid February with a programme of 125,000 to 130,000 tonnes. There is no organic production.

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The preliminary world production estimate for 2022 is **37,257 million tonnes**. This is 6.1% lower than the initial production intentions in March 2022 (39.671 million tonnes) and 4.9% lower than 2021 total production of 39.184 million tonnes.



WPTC World production estimate of tomatoes for processing

(in 1000 metric tonnes)

Date of last update: 25/10/2022

		2019		2020		2021		2022		AVERAGE	VARIATION	
		FINAL		FINAL		FINAL		PRELIMINARY		2019-2021	2022 vs 2021	
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Algeria*	800	Mem.	800	Misc.	1 000	Misc.	see below	867	n/a	
		Egypt	400	Mem.	420	Mem.	440	Mem.	440	Mem.	420	0%
		France	154	Mem.	136	Mem.	164	Mem.	142	Mem.	151	-13%
		Greece	400	Mem.	420	Mem.	420	Mem.	340	Mem.	413	-19%
		Hungary**	100	Mem.	82	Mem.	115	Mem.	80	Mem.	99	-30%
		Iran*	1 650	Mem.	1 300	Mem.	1 300	Est.	see below		1 417	n/a
		Israel	200	Mem.	200	Mem.	200	Est.	200	Est.	200	0%
		Italy	4 801	Mem.	5 166	Mem.	6 059	Mem.	5 480	Mem.	5 342	-10%
		Malta**	8	Est.	8	Est.	7	Mem.	7	Mem.	8	0%
		Portugal***	1 410	Mem.	1 262	Mem.	1 596	Mem.	1 330	Mem.	1 423	-17%
		Russia**	552	Mem.	515	Mem.	523	Mem.	638	Mem.	530	22%
		Spain***	3 200	Mem.	2 650	Mem.	3 185	Mem.	2 100	Mem.	3 012	-34%
		Syria**	42	Mem.	42	Est.	40	Est.	40	Est.	41	0%
		Tunisia	815	Mem.	961	Mem.	940	Mem.	610	Mem.	905	-35%
		Turkey	2 200	Mem.	2 500	Mem.	2 200	Mem.	2 350	Mem.	2 300	7%
Ukraine**	720	Mem.	800	Mem.	800	Mem.	120	Mem.	773	-85%		
Subtotal AMITOM		17 452		17 262		18 989		13 877		17 901	-27%	
of which members in EU		10 073		9 724		11 546		9 479		10 448	-18%	
OTHER MEMBERS	Brazil	1 200	Mem.	1 421	Mem.	1 525	Mem.	1 500	Mem.	1 382	-1,6%	
	Canada	434	Mem.	438	Mem.	399	Mem.	535	Mem.	424	34%	
	California	10 144	Mem.	10 258	Mem.	9 761	Mem.	9 525	Mem.	10 054	-2%	
	China	4 600	Mem.	5 800	Mem.	4 800	Mem.	6 200	Mem.	5 067	29%	
	Japan	27	Mem.	23	Mem.	28	Mem.	27	Mem.	26	-4%	
Subtotal Other Members		16 405		17 940		16 513		17 787		16 953	7,7%	
NON MEMBERS	Algeria	see above		see above		see above		800	Misc.	867	-20%	
	Bulgaria	40	Misc.	40	Est.	40	Est.	40	Est.	40	0%	
	Czech Republic	25	Est.	25	Est.	25	Est.	25	Est.	25	0%	
	Iran	see above		see above		see above		1 300	Est.	1 417	0%	
	Morocco	130	Est.	100	Misc.	100	Est.	100	Est.	110	0%	
	Poland	175	Misc.	175	Est.	175	Est.	175	Est.	175	0%	
	Slovakia	20	Est.	20	Est.	20	Est.	20	Est.	20	0%	
	USA excluding California	370	Misc.	463	Misc.	462	Misc.	450	Misc.	432	-3%	
Subtotal Non Members		760		823		822		2 910		802	254%	
Total Northern Hemisphere		34 617		36 025		36 324		34 574		35 655	-4,8%	
of which WPTC members		33 857		35 202		35 502		31 664		34 854	-10,8%	
of which European Union		10 333		9 984		11 806		9 739		10 708	-17,5%	
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	395	Mem.	454	Mem.	596	Mem.	626	Mem.	482	5,0%
		Australia	212	Mem.	210	Mem.	233	Mem.	227	Mem.	218	-2,6%
		Chile	1 100	Mem.	907	Mem.	1 174	Mem.	971	Mem.	1 060	-17,3%
		Peru	100	Mem.	100	Mem.	120	Mem.	125	Mem.	107	4,2%
		South Africa	140	Mem.	150	Mem.	125	Mem.	120	Mem.	138	-4,0%
	Subtotal members		1 947		1 821		2 248		2 069		2 005	-8,0%
	NON MEMBERS	Dominican Republic	258	Est.	181	Misc.	227	Misc.	227	Est.	222	0,0%
		India	154	Misc.	152	Misc.	162	Misc.	162	Est.	156	0,0%
		Mexico	40	Est.	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	50	Est.	50	Est.	50	Est.	52	Misc.	50	4,0%
Senegal		77	Misc.	73	Misc.	73	Est.	73	Est.	74	0,0%	
Thailand	43	Misc.	40	Misc.	40	Misc.	40	Est.	41	0,0%		
Venezuela	20	Est.	20	Est.	20	Est.	20	Est.	20	0,0%		
Subtotal non members		642		556		612		614		603	0,3%	
Total Southern Hemisphere		2 589		2 377		2 860		2 683		2 609	-6,2%	
GENERAL TOTAL		37 206		38 402		39 184		37 257		38 264	-4,9%	
of which members of the WPTC		35 804		37 023		37 750		33 733		36 859	-10,6%	
WPTC as percentage of total production		96%		96%		96%		91%		96%	-6,0%	

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

* Have now left AMITOM ** AMITOM associate members *** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:

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