WPTC CROP UPDATE AS OF 31ST MARCH 2023

AMITOM COUNTRIES

EGYPT

The winter crop is in its last loop which is supposed to last till 3rd week of April. The early summer crop will start around 10th of May. The overall forecast remains 500,000 tonnes with prices currently at abut 130 USD per tonne ex-field. Quality is good.

FRANCE

The volume of the contracts is 160,000 tonnes but the total surfaces are not yet confirmed. A few growers started planting last week in the South-East, but most will start next week unless the cold weather which is forecast is too severe. In the South-West planting will start mid-April. Water availability should not be an issue this year although winter rainfall was low, with some risk however for the late crop. Prices are still being negotiated by each company individually and should be in the order of 135-140 euros ex-field.

GREECE

Conditions are generally good. There is not as much water as usual but there is no worry of scarcity for the summer. Weather is currently cold and wet, and planting should start on 1st April in the south. Farmers are keen to plant tomatoes, so the forecast is raised to 440,000 tonnes. Prices will c. 150 euros per tonnes delivered.

HUNGARY

The 100.000 tonnes forecast remains for the country. Raw tomato price is ca. 135 euro per tons ex-field, but as it is agreed on HUF basis with the farmers, it can slightly change due to exchange rate changes.

ITALY

In the south, the water availability in the reservoirs is good and more surfaces will be planted in Puglia compared to last year. Expectations are for an increase of 7 to 8% in surfaces and volumes in the south, from 2.59 million tonnes in 2022 to 2.80 million tonnes in 2023. Transplanting began this week in Caserta and will start next week in Puglia. No agreement on prices yet but they could increase by a significant percentage.
In the north, planting should start next week. There are concerns for the water availability for the end of the season especially in the north-west as the snowfall this winter was low although some storms last week eased up the drought in the north-east (Ferrara Ravenna provinces). The total surfaces should remain unchanged compared last year but there could be some reduction in the late crop. Negotiations have stalled with processors offering around 130 euros and growers wanting 155 euros.
There is no change to the overall forecast of 5.7 million tonnes.

PORTUGAL
The forecast remains unchanged at 1.45 million tonnes. Weather is warm and dry and planting is starting.

RUSSIA
The forecast remains unchanged at 650,000 tonnes.

SPAIN
There is no change to the forecast which remains 2.6 million tonnes. Planting started last week in Andalusia and this week in Extremadura. Water allocation is at 60% of normal, better than last year. The weather is currently good and quite dry. As published a few weeks ago, the price is 150 euros per tonne ex-field.

TUNISIA
The forecasted plantation area is confirmed at around 10,000 hectares for a processed volume of around 500,000 tonnes. Operations started on 22 February and the progress of planting is 65%-70%. The water situation (as of 19 March 2023) is nearly 740 million m3 in 36 dams, which represents 32% of their filling capacity.

TURKEY
The forecast is now raised to 2.6 million tonnes as farmers are keen to plant tomatoes and stocks of tomato products are depleted due to increased shipments. Surfaces will increase in all regions including Konya where production has been growing in recent years. The weather is currently a bit cool so planting has stopped but should restart next week.

UKRAINE
It is expected that a volume of 500 000 to 600 000 tonnes of tomatoes will be processed in 2023.

OTHER NORTHERN HEMISPHERE COUNTRIES

BRAZIL
Surfaces planted in 2023 should increase by 9% to 20,130 hectares, of which 14,150 ha in Goais, 3,280 ha in Sao Paulo and 2,700 ha in Minas Gerais. The total volume processed was expected to be 1,984,200 tonnes, 22% more than the 1,632,210 tonnes processed in 2022. Recent rains may disrupt the start of the season although the long-term forecast is that of 2023 being a El Nino year, which is normally favourable for a good tomato crop (see report attached).

CALIFORNIA
After 3 years of extremely dry conditions, this year California has experienced incredible amounts of precipitation. The abnormally large amount of snow and rainfall has resulted in California growers receiving significant water allocations. What that means for this year is a decrease in the amount of fallow land due to the drought and the ability for our industry to contract to meet market demands. As with anything else, there can be too much of a good thing. While the precipitation has relieved the state of the extreme drought conditions, the continued rainfall in the central valley has materially delayed transplanting. At this time, we are approximately 12-16 days behind on the calendar. Some growers in the south have been able to plant in very small windows (in less-than-ideal conditions) in between the rain events over the past month but the volumes are much less than scheduled at this point. In the Northern part of the state, we hope transplanting can begin by the end of the first week in April.

The March 1st, 2023 inventory is appended to this report.

CANADA

Ontario preliminary projected contract tonnage for 2023 is 584,000 short tons (530,000 metric tonnes). The weather for March has varied between mild and cold temperatures with some rain or snow.

CHINA

The forecast remains 7.3 million tonnes. The estimate is based on seeds sales, and it is too early to get information on the surfaces in the different regions and the price of tomatoes. China usually transplants at the end of April, and relatively accurate regional data should be available after at that time.

JAPAN

The expected surfaces (to be) planted are 470 ha for a volume of tomatoes to be processed of 29,000 tonnes.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

This season was very troublesome for growers and processors, with frosts at the beginning and at the end of season combined with high temperatures and hails affecting final yields both in San Juan and Mendoza provinces. The final numbers will be released in a month when the harvest is finished but it is estimated a yield reduction around 13 % of the last forecast, therefore, today the estimation is 576,000 tonnes.

CHILE

The harvest will continue until the end of April. This March has been one of the warmest in history which may lead to a small reduction in the final volume compared with the estimate of 1.15 million tonnes, which is maintained for now but with a minor downwards trend.

SOUTH AFRICA

South Africa contracted in total a 155,000 tonnes harvest for the 2023 season. The summer production Western Cape areas contracted 53,000 tonnes, of which 50% has already been delivered and on schedule. The Limpopo winter production contracted to 102,000 tonnes, which will commence during April till end October. Both areas, received out of season precipitation, which put pressure on the harvesting process and transplanting schedules. Some processors and about 25% of the growers took the risks to trade without a processing contract and both thus risks the opportunistic prices on the South Africa open market during the winter season.

World Processing Tomato Council

World production estimate of tomatoes for processing

Date of last update: 31/03/2023

Hemisphere	Group	Country	2021 FINAL		2022 FINAL		2023 FORECAST		AVERAGE 2020-2022	VARIATION 2023 vs 2022
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Egypt	440	Mem.	456	Mem.	500	Mem.	465	10%
		France	164	Mem.	142	Mem.	160	Mem.	155	13%
		Greece	420	Mem.	340	Mem.	440	Mem.	400	29%
		Hungary**	115	Mem.	80	Mem.	100	Mem.	98	25%
		Israel	200	Est.	200	Est.	200	Est.	200	0%
		Italy	6 059	Mem.	5 476	Mem.	5 700	Mem.	5 745	4%
		Malta**	7	Mem.	5	Mem.	8	Est.	7	60%
		Portugal***	1 596	Mem.	1 414	Mem.	1 450	Mem.	1 487	3%
		Spain***	3 185	Mem.	2 125	Mem.	2 600	Mem.	2 637	22%
		Syria**	40	Est.	40	Est.	40	Est.	40	0%
		Tunisia	940	Mem.	689	Mem.	500	Mem.	710	-27%
		Turkey	2 200	Mem.	2 350	Mem.	2 600	Mem.	2 383	11%
		Ukraine**	800	Mem.	120	Mem.	500	Mem.	473	317%
		Subtotal AMITOM	**16 166**		**13 437**		**14 798**		**14 800**	**10%**
		of which members in EU	**11 546**		**9 582**		**10 458**		**10 529**	**9%**
	OTHER MEMBERS	Brazil	1 525	Mem.	1 632	Mem.	1 984	Mem.	1 714	21,6%
		Canada	399	Mem.	548	Mem.	530	Mem.	492	-3%
		California	9 761	Mem.	9 514	Mem.	11 249	Mem.	10 175	18%
		China	4 800	Mem.	6 200	Mem.	7 300	Mem.	6 100	18%
		Japan	28	Mem.	27	Mem.	30	Mem.	28	11%
		Subtotal Other Members	**16 513**		**17 921**		**21 093**		**18 509**	**17,7%**
	NON MEMBERS	Algeria*	1 000	Misc.	1 200	Misc.	1 350	Misc	1 183	13%
		Bulgaria	40	Est.	40	Est.	40	Est.	40	0%
		Czech Republic	25	Est.	25	Est.	25	Est.	25	0%
		Iran*	1 300	Est.	1 300	Est.	1 300	Est.	1 300	0%
		Morocco*	100	Est.	100	Est.	100	Est.	100	0%
		Poland	175	Est.	175	Est.	175	Est.	175	0%
		Russia*	523	Mem.	638	Mem.	650	Misc	604	2%
		Slovakia	20	Est.	20	Est.	20	Est.	20	0%
		USA excluding California	462	Misc.	450	Misc.	450	Misc	454	0%
		Subtotal Non Members	**3 645**		**3 948**		**4 110**		**3 901**	**4%**
		Total Northen Hemisphere	**36 324**		**35 306**		**40 001**		**37 210**	**13,3%**
SOUTHERN HEMISPHERE	MEMBERS	Argentina	596	Mem.	626	Mem.	576	Mem.	599	-8,0%
		Australia	233	Mem.	227	Mem.	139	Mem.	200	-38,8%
		Chile	1 174	Mem.	971	Mem.	1 150	Mem.	1 098	18,4%
		Peru	120	Mem.	125	Mem.	150	Mem.	132	20,0%
		South Africa	125	Mem.	120	Mem.	155	Mem.	133	29,2%
		Subtotal members	**2 248**		**2 069**		**2 170**		**2 162**	**4,9%**
	NON MEMBERS	Dominican Republic	227	Misc.	227	Est.	227	Est.	227	0,0%
		India	162	Misc.	162	Est.	162	Est.	162	0,0%
		Mexico	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	50	Est.	52	Misc.	25	Misc.	42	-51,9%
		Senegal	73	Est.	73	Est.	73	Est.	73	0,0%
		Thailand	40	Misc.	40	Est.	40	Est.	40	0,0%
		Venezuela	20	Est.	20	Est.	20	Est.	20	0,0%
		Subtotal non members	**612**		**614**		**587**		**604**	**-4,4%**
		Total Southen Hemisphere	**2 860**		**2 683**		**2 757**		**2 767**	**2,8%**
		GENERAL TOTAL	**39 184**		**37 989**		**42 758**		**39 977**	**12,6%**
		of which members of the WPTC	34 927		33 427		38 061		35 472	13,9%
		WPTC as percentage of total production	89%		88%		89%		89%	1,2%

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

* Previously an AMITOM member ** AMITOM associate members *** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:

WPTC does not guarantee or assume any liability for the accuracy of the contents of this report and shall not be responsible for any losses sustained as a result of relying on the contained information.

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