

## WPTC CROP UPDATE AS OF 28 APRIL 2023

### AMITOM COUNTRIES

#### EGYPT

There is no change to the forecast. It is now the transition between the winter crop and the early summer crop which should start around 10 May.

#### FRANCE

Planting is slow with only about a third of the surfaces already planted in the south-east and only 20% in the south-west where regular small rains make planting difficult. In the south-east some rain would be beneficial as the winter and spring have been unseasonably dry. The forecast remains unchanged.

#### GREECE

The unstable weather delayed the start of the planting and operations had to be rushed when was is an appropriate window. This means that only about 50% of the surfaces have now been planted, against about 65% in a normal year. This may lead to a bunching of the crop in early August. The forecast remains unchanged.

#### HUNGARY

The forecast of 100,000 tonnes is maintained. It is expected that ca. 1350 ha processing tomato will be planted. Direct sowing started last week, and transplanting will start at the end of this week. Mornings have been cool until now but from the weekend warmer weather is expected.

#### ITALY

In the North, transplanting started in the first week of April but as the spring has been very cold, some fields were damaged by frost, and some by rains storms or hail, especially in the Ferrara area. Although 30% of the surfaces have now been planted, which is normal at this date, plant development is slower than usual.

There is still no price agreement, except by an announced deal made by Casalasco with two POs for a quantity that represents less than 10% of the total quantity forecasted in northern area. Negotiations will restart in coming days and there will be a new offer from processing company based on two years contract price.

In the South, transplanting is delayed. It started at the end of March in Caserta but stopped before Easter as temperatures dropped. After restarting stopped again due to rains until last weekend. It means that the harvest may be delayed, although it is still early to say. Processors are offering 140 euros for round tomatoes and 145 euros for long ones, but farmers are waiting for the price in the north is set before finalising contracts. The surfaces should be slightly up from last year.

The forecast remains the same in both regions at a total of 5.7 million tonnes.

## PORTUGAL

The official figures indicate a total crop to be processed in Portugal of 1.5 million tonnes for total surfaces planted of 15,100 hectares. These will be confirmed in early June. The good weather this spring enables a good plant development so the crop should be on time.

## SPAIN

There have been no significant rains this year and temperatures have been high last week at 30°C with up to 35°C expected this week. This means that fields are very dry and have to be irrigated more than normal during planting, which is worrisome as water allocations have been reduced. All surfaces may not be planted. Transplanting operations are on schedule and should end mid-May in Andalusia and by the end of May in Extremadura, but they may have to be interrupted in the next few days.

## TURKEY

In the south, planting is almost finished after some delay due to rain which may mean some clashing with the Bursa crop which is normally harvested later. Planting in Bursa has not yet started, and it is half-way in the in-between regions. There is no worry with water availability for this season and the forecast remains unchanged.

## UKRAINE

In the Mykolaiv region, a total 240,000 hectares of land need to be demined, including 19,000 hectares held by Inagro. This will take a few years.

Of Inagro's three factories, one is still in a territory occupied by Russia, the other two have been partially damaged, including some nurseries and 16,000 tonnes of paste have been destroyed. In 2022, Inagro rented 1,000 hectares of land in the Odessa region and produced 80,000 tonnes of tomatoes, 15,000 tonnes of which were processed in the company's factories, some by other plants and some sold on the fresh market.

For the 2023 season, a total of 8,000 hectares of tomatoes should be planted in Ukraine for a volume processed expected at 600 000 tonnes, about 500,000 tonnes of which by Inagro. Transplanting is starting this week.

## OTHER NORTHERN HEMISPHERE COUNTRIES

### BRAZIL

The season is progressing as expected. Some regions being impacted by rainfall above the historical average, but we still cannot define impact on the projected volumes.



### CULTIVATION AREA OF THE INDUSTRIAL TOMATO 2023 – AREA AND VOLUME

	AREA (ha)			VOLUME (tonnes)		
	2022	2023	EV	2022	2023	EV
<b>TOTAL</b>	<b>18.530</b>	<b>19.812</b>	<b>7%</b>	<b>1.632.210</b>	<b>1.933.190</b>	<b>18%</b>
<b>GOIAS</b>	<b>12.800</b>	<b>13.630</b>	<b>11%</b>	<b>1.155.650</b>	<b>1.349.350</b>	<b>23%</b>
<b>SÃO PAULO</b>	<b>3.100</b>	<b>3.482</b>	<b>6%</b>	<b>226.300</b>	<b>311.340</b>	<b>28%</b>
<b>MINAS GERAIS</b>	<b>2.630</b>	<b>2.700</b>	<b>3%</b>	<b>250.260</b>	<b>272.500</b>	<b>9%</b>

## CALIFORNIA

After delays due to a very wet winter and spring, planting is now fully underway. As we reported in the last update planting is about 12-16 days behind schedule.

In the south growers have been able to catch up to some degree but the concern is a lot of acres have been bunched together during that period.

In the Northern part of the State, planting picked up in the first week of April at a slow pace but progressed quickly.

Due to the flooding concerns in some areas throughout the State, acreage has shifted to other locations in the growing region. This was made possible by those areas having received a full water allocation, allowing them more acres to be farmed than what was possible earlier in the year.

USDA/NASS will release a new estimate at the end of May and that will give us a better idea of the overall impact to the original estimate.

## CANADA

Preliminary contract tonnage for 2023 remains 584,000 short tons (530,000 metric tonnes). The weather in April has been relatively mild with some periods of rain.

## CHINA

The current estimated total amount is still 7.3 million metric tonnes. Due to the temperature fluctuations in northern Xinjiang, the transplanting time is later than 2022, and the impact of delayed transplanting on the future still needs to be observed. We will calculate the planting area and update the estimated total amount after all transplants are completed.

## JAPAN

There is no change to the last report. The forecast remains 29,000 tonnes from 470 hectares.

## SOUTHERN HEMISPHERE COUNTRIES

### AUSTRALIA

As of 27 April, Australia has processed 55,700 tonnes of tomatoes. The full year projection is 92,300 tonnes, which is lower than previous forecasts, due to rain across all regions approximately 10 days ago and inadequate time for crops to finish off. The last seven days, however, has seen harvest condition improve due to warm and dry conditions. The 14-day outlook is for dry conditions, which will be highly beneficial to the harvest program.

### ARGENTINA

Good weather conditions during the last month allowed to harvest with fair quality most of the production. The harvest will finish in two weeks and the final volume will be released then. The forecast remains at 580,000 tonnes for the moment.

### CHILE

The harvest is finishing this week. The final volume will be available in a few days, but it should be close to the last estimate of 1.15 million tonnes. It did not rain until the end of the crop, but the summer heatwaves affected yields in specific areas.

## **SOUTH AFRICA**

South Africa in total, projects to a 167,000 tonnes harvest for the 2023 season.

The Western Cape summer production areas will end in May with nearly about 50,000 tonnes produced.

Regarding the winter season crop, harvesting commenced in March and will end in October, currently projecting to a 117,000 tonnes winter crop. Tuta absoluta and heavy rainfall out of season in certain areas are problematic. No water issues foreseen in the current growing season. The average yield should be lowered with about 10%, the brix levels projects to be above normal which is good for local paste production.