

## WPTC CROP UPDATE AS OF 1 SEPTEMBER 2023

### AMITOM COUNTRIES

#### FROM A CONFERENCE CALL ON 30 AUGUST:

##### EGYPT

The heat wave have affected yields in the summer season, but quality was ok. Temperatures are now back to normal and processing in small quantities as the crop is now transitioning to the late summer crop which will start mid-September. The transplanting for winter crop may be delayed 15 days to skip the heat wave in order to maintain complete blossom, as the expectations are positive for it. The situation is being assessed by field departments and the overall forecast will be reviewed in a few weeks.

##### FRANCE

To date about 80,000 tonnes have been processed, which is 50% of the forecast. Despite issues with late blight in late spring and fruit flies, overall yields are perhaps better than expected. Brix is about 5 and penalties 6%. Quality and yields are good. After a heat wave for 3- or 4-days last week, temperatures are now cooler than usual, especially in the south-east where it is also windy. No rain is forecast in the coming days. If September is good the 160,000 tonnes forecast should be achieved.

##### GREECE

The crop is progressing well as the weather is very good. Field yields are very good and average brix of 5. In the south already 75% of the forecast has been processed, a bit lower than usual, and overall, 65% in the whole country. The forecast remains unchanged.

##### HUNGARY

The plan is unchanged at 100,000 tonnes. The weather changed last week, and hot days arrived. Harvesting is going well with average yields and good Brix. As of today, 1/3 of the total quantity has been processed.

##### IRAN

Crop harvesting is still going in northern parts of Iran and factories are working in full capacity. The weather is much better with temperatures around 18-20 degree.

##### ITALY

**North** – As of 20 August a total of 1.35 million tonnes have been processed which is 42% of contracts. Average brix is 4.94 and penalties at 4.5% with the payment index at 98%. After two weeks of very high temperatures and a heatwave, there was a drop and rain at the weekend in all the region, with up to 60-70 mm in some cases. Today all factories are closed and they should restart on Thursday or Friday. The forecast is reduced following lower yields than expected especially in the east of the region (Ferrara, Ravenna).

**South** – As of 20 August a total of 1.2 million tonnes have been processed which is 41% of contracts. As of today, it is about 50%. Most of the factories are stopped today following the rains. They should restart tomorrow or Friday. In Puglia rain was less intense, but in Tuscany, Lazio, Campania, and Basilicata rains was more intense. Quality is very good so far although brix is medium. Effects of the rains will need to be assessed.

As overall yields have been a little bit lower than expected, the overall forecast for Italy is revised down from 5.6 to 5.5 million tonnes. The final results will depend on the weather in September, but the forecast is good for the next 10 days.

## **PORTUGAL**

There have been a few days of high heat around 21-24 August after which the temperatures dropped, with very cool temperatures at night (15°C) and a lot of wind. To date, 67% of the forecast has been processed and it has been a smooth season so far with a potential to exceed forecasts. There are some concerns, however, over the late fields especially due to insect infestation, mainly tuta absoluta and spider mites in the late fields, which could affect the late crop and further reduce yields which have been lower in the second half of the crop. Some rain is forecast for next Monday and Tuesday. The harvest should continue with significant volumes for two weeks, and then for a further 1 or 2 weeks. The forecast remains unchanged.

## **SPAIN**

The harvest is reaching the end in Andalusia here the first factory will close next week. In Extremadura the harvest is at about 65% of expectations. The recent heatwave with temperatures over 40°C for a few days had some effect on yields which are a bit lower than expected. Some rain is forecast for the coming weekend. The forecast remains unchanged.

## **TUNISIA**

Tomato processing is currently ongoing at 3 of the 18 plants, with a daily output of around 600 tonnes, enabling more than 600,000 tonnes to be processed since the start of the campaign.

## **TURKEY**

Only about 45% of the surfaces have been harvested as the crop is exceptionally late, with at least two weeks delay: whereas the peak production should have been reached around 20-25 August, it is only now arriving today. The weather is good with stable temperatures and no rain is forecast. The areas harvest now including the Konya region which is coming into production have not suffered from high heat and thus yields are good. Although there are concerns for what the weather may be for the last 10-15 days of the harvest as the crop is very late, the forecast remains unchanged.

## **OTHER WPTC MEMBERS**

### **BRAZIL**

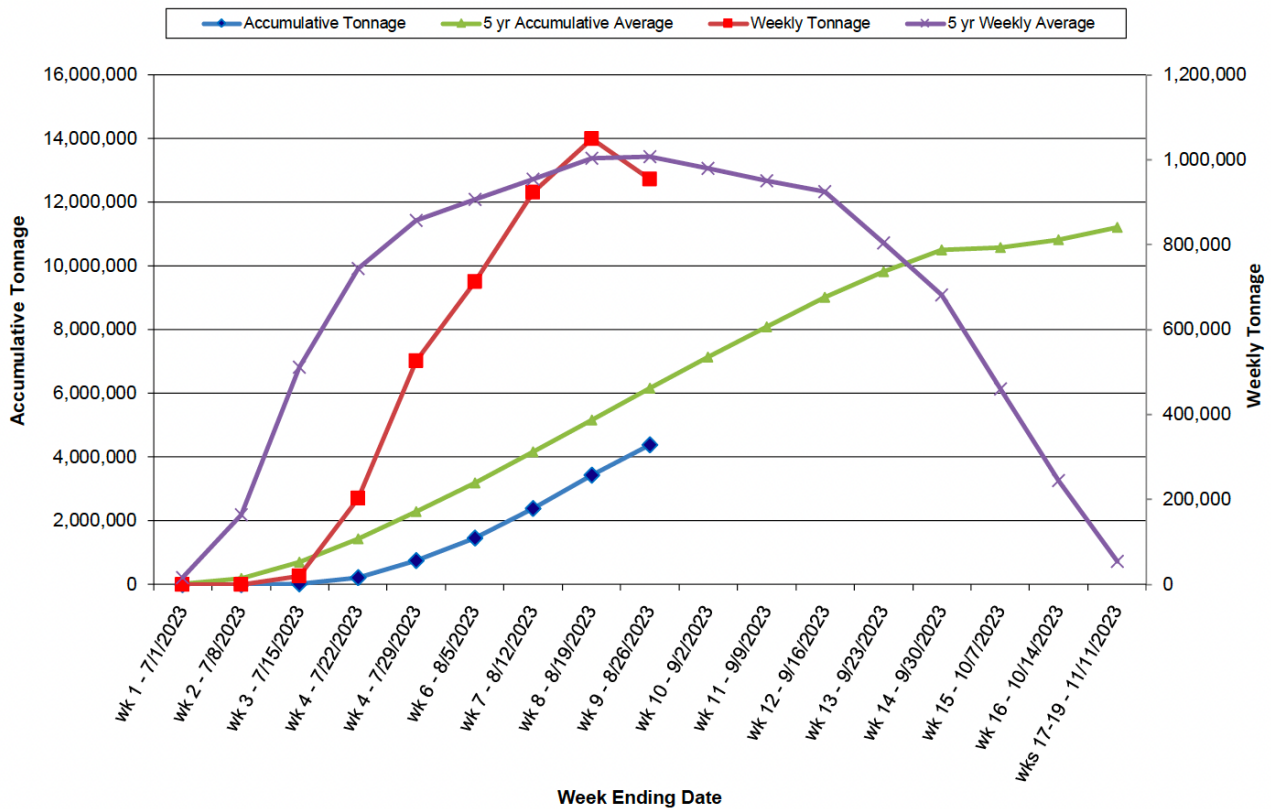
Rain during transplanting affected some fields and some areas had to be transplanted again. This is expected to have caused a 5 to 7% reduction for volumes. Moreover another 7 to 8% reduction is expected with low brix at fields, with fruits now received at 4.1-4.3 brix only. Altogether operators are now expecting a reduction of about 15% in the crop size from just above 2 million tonnes to 1.7 million tonnes.

## CALIFORNIA

The estimate is to process 1,099,152 tons this week. At the end of this week (week ending 9/02) we will have processed 5,508,802 tons. At the of this week approximately 40-45% of the crop will have been harvested.

We will need to process at or near capacity for the next 2 months in order to complete this harvest. As we have stated earlier, the tonnage number will depend greatly on September and October weather and harvesting conditions, as these are the months that produce the greater risks. When we reach the midway point in the season, we will be better positioned to make an adjustment to the previous estimate. In the Southern part of the state, we are seeing some impacts to the rains that we received earlier in August. This has caused a few fields in some cases to be bypassed due to mold.

**Five Year Average | California Tomato Tonnage**



## CHINA

No change to report.

## JAPAN

Harvest in the Kanto and Chubu regions was almost completed, and growth was relatively smooth. Harvesting will begin in Hokkaido, one of the major producing regions, but there are concerns that the harvest will decrease slightly due to the effects of the drought. Total volume of tomatoes to be processed is the same as the last report.

		2021 FINAL		2022 FINAL		2023 FORECAST		AVERAGE 2020-2022	VARIATION 2023 vs 2022	
<b>NORTHERN HEMISPHERE</b>	<b>MEMBERS IN MEDITERRANEAN AREA (AMITOM)</b>	Egypt	440	Mem.	456	Mem.	600	Mem.	499	32%
		France	164	Mem.	142	Mem.	160	Mem.	155	13%
		Greece	420	Mem.	340	Mem.	430	Mem.	397	26%
		Hungary**	115	Mem.	80	Mem.	100	Mem.	98	25%
		Iran**	1 300	Est.	1 300	Est.	1 300	Est.	1 300	0%
		Israel	200	Est.	200	Est.	200	Est.	200	0%
		Italy	6 059	Mem.	5 476	Mem.	5 500	Mem.	5 678	0%
		Malta**	7	Mem.	5	Mem.	8	Est.	7	60%
		Portugal***	1 596	Mem.	1 414	Mem.	1 500	Mem.	1 503	6%
		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.	649	Mem.	600	Mem.	730	-8%
		Turkey	2 200	Mem.	2 350	Mem.	2 600	Mem.	2 383	11%
Ukraine**	800	Mem.	120	Mem.	600	Mem.	507	400%		
<b>Subtotal AMITOM</b>		<b>17 466</b>		<b>14 697</b>		<b>16 238</b>		<b>16 134</b>	<b>10%</b>	
of which members in EU		11 546		9 582		10 298		10 475	7%	
<b>OTHER MEMBERS</b>	Brazil	1 525	Mem.	1 632	Mem.	1 700	Mem.	1 619	4,2%	
	Canada	399	Mem.	548	Mem.	530	Mem.	492	-3%	
	California	9 761	Mem.	9 514	Mem.	10 900	Mem.	10 058	15%	
	China	4 800	Mem.	6 200	Mem.	7 300	Mem.	6 100	18%	
	Japan	28	Mem.	27	Mem.	30	Mem.	28	11%	
	<b>Subtotal Other Members</b>	<b>16 513</b>		<b>17 921</b>		<b>20 460</b>		<b>18 298</b>	<b>14,2%</b>	
<b>NON MEMBERS</b>	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%	
	Morocco*	100	Est.	100	Est.	100	Est.	100	0%	
	Poland	175	Est.	175	Est.	175	Est.	175	0%	
	Russia*	523	Mem.	638	Mem.	670	Misc.	610	5%	
	Slovakia	20	Est.	20	Est.	20	Est.	20	0%	
	USA excluding California	462	Misc.	450	Misc.	450	Misc.	454	0%	
<b>Subtotal Non Members</b>	<b>2 345</b>		<b>2 648</b>		<b>2 830</b>		<b>2 608</b>	<b>7%</b>		
<b>Total Northern Hemisphere</b>		<b>36 324</b>		<b>35 266</b>		<b>39 528</b>		<b>37 039</b>	<b>12,1%</b>	
<b>SOUTHERN HEMISPHERE</b>	<b>MEMBERS</b>	Argentina	596	Mem.	626	Mem.	586	Mem.	603	-6,4%
		Australia	233	Mem.	227	Mem.	110	Mem.	190	-51,5%
		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.	160	Mem.	135	33,3%
	<b>Subtotal members</b>	<b>2 248</b>		<b>2 069</b>		<b>2 156</b>		<b>2 158</b>	<b>4,2%</b>	
	<b>NON MEMBERS</b>	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%		
<b>Subtotal non members</b>	<b>612</b>		<b>614</b>		<b>587</b>		<b>604</b>	<b>-4,4%</b>		
<b>Total Southern Hemisphere</b>		<b>2 860</b>		<b>2 683</b>		<b>2 743</b>		<b>2 762</b>	<b>2,2%</b>	
<b>GENERAL TOTAL</b>		<b>39 184</b>		<b>37 949</b>		<b>42 271</b>		<b>39 801</b>	<b>11,4%</b>	
of which members of the WPTC		36 227		34 687		38 854		36 589	12,0%	
WPTC as percentage of total production		92%		91%		92%		92%	0,6%	

**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 &amp; 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

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**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.**