

WPTC CROP UPDATE AS OF 15 SEPTEMBER 2023

AMITOM COUNTRIES

FROM A CONFERENCE CALL ON 13 SEPTEMBER:

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

At the end of last week 118,000 tonnes had been processed which is 74% of the total forecast. Harvest is progressing well with good quality, but with slightly lower brix than earlier in the season. Field yields are also a bit down due to fruit flies notably. Some rain is forecast for the end of the week, but the harvest should continue until the end of September or the very first days in October.

GREECE

The terrible floods last week have affected all the fields in the Centre region of **Thessalia** and very few of the tomato field remaining there will be harvested. Luckily, there has not been any big damages to any of the factories. Already 87% of the forecast of 430,000 tonnes has already been processed and the total outlook is now revised down to about 400,000 tonnes or slightly under. No long-term damage to the fields is expected, except for a few which were in the path of over flown creeks or rivers.

HUNGARY

Considering the higher yields, we increase the total forecast up to 115,000 tonnes. Previously we were more careful due to plant protection challenges but approaching the last third of season it is clear. Expectable end of processing is end of September.

IRAN

The harvest is now finished in the **South** but continuing in the **Azerbaijan region** where factories are still all at full capacity. It is estimated that two-third of the total volume has been processed with the end of the season expected at the middle to end of October. The weather is now back to normal temperatures after a very hot period. Quality and colour are good. Processors face issues with rising costs of energy, tomatoes and currency fluctuations making it hard to plan and set a price for paste.

The total tomato crop is estimated at 6 to 7 million tonnes with the majority of the volume for the fresh market and approximately 20 to 30% for processing. There is no official data, so these

are only estimates based on experience and observations and can vary depending on factors such as season and market conditions.

ITALY

In the **North**, as of 3 September, the OI reported that 1.89 million tonnes had been processed with an average brix of 4.92 and penalties of 4.69%. Quantities processed during the last week of August were reduced due to rains which impacted all factories. They restarted last week but often at a reduced pace as the gap between early and late varieties remains. Some factories in the east have already closed. Quality and colour are good and there are no big issues with diseases. As there are lower volumes than planned for the late crop, notably following the rains in July, it is expected that the final volume will be lowered but there is still a lot of uncertainties, and it is too early to give a revised figure. Losses are more important in the eastern regions of Ferrara and Ravenna and for the organic crop (-25 to -30%). The harvest should finish at the end of September.

In the **South**, as of 3 September, 1.75 million tonnes had been processed, and as of 9 September, a satellite survey showed that 7,500 hectares remained to be harvested which means that the full program could be achieved. However, this is one of the worst crops with a lot of stop-and-go due to the succession of weather incidents (rains in the spring, hail in July, heatwave in mid-July, ...). There is a high level of uncertainties as there is a lot of uneven ripening leading to difficulty in assessing yields. Already now factories are running slowly because some of the tomatoes will only ripen in October.

The forecast is maintained at 5.5 million tonnes, but final production is uncertain and will probably be a bit lower.

PORTUGAL

Some unexpected rain last Sunday and Monday slowed processing in the last couple of days as fields are difficult to harvest. Due to the unstable weather, with temperatures up and down, yield is very variable with some good fields and some poor ones. More rain is expected this coming weekend. As of 11 September, 93% of the forecast had been processed and the harvest should continue for another week or two, to maybe reach the forecast but not exceed it.

SPAIN

All the areas were affected by rains during the first weekend in September and all factories had to stop for a few days. Due to the delays, factories in **Andalusia** which should be closed by now will finish next week. In **Extremadura**, the harvest should continue until about 25 September. The forecast is kept unchanged but with some risk of being reduced as there will be losses which are still difficult to assess due to the rains (more expected next weekend) or lack of water.

TUNISIA

Seasonal tomato processing is completed in Tunisia, with a total volume processed of nearly 650,000 tonnes.

TURKEY

The crop is going as planned with a dry weather so far as the heavy rains in Greece and parts of Turkey did not affect the tomato areas. About 70% of the expected volume has been processed to date. The harvest should now be finished in the **South** but there are still some tomatoes and there is about 10 to 15 days left in the **Bursa** area. The season should finish during the first week of October. The forecast remains unchanged.

OTHER WPTC MEMBERS

BRAZIL

Harvest are proceeding at a rapid pace, and the main factors identified are as follows:

In **Goias**, heavy rainfall in the first semester caused erosion and a loss of productive conditions in the areas. In the second semester (August and now in September), significant rains occurred in the productive regions, interrupting the harvest and affecting the yields. I

In **Sao Paulo**, in addition to the very intense climate in the first semester, there was an impact from the BSP 0034 hybrid genetics, which is showing a decrease of about 25% in yields in the state's planting areas, significantly impacting the state's numbers.

In **Minas Gerais**, the misfortune is also related to the climate, which is not within the normal range, with rainfall occurring practically every month of the year.

It is estimated that we are reaching around 60% of the harvest volume, with factories operating at maximum capacity.



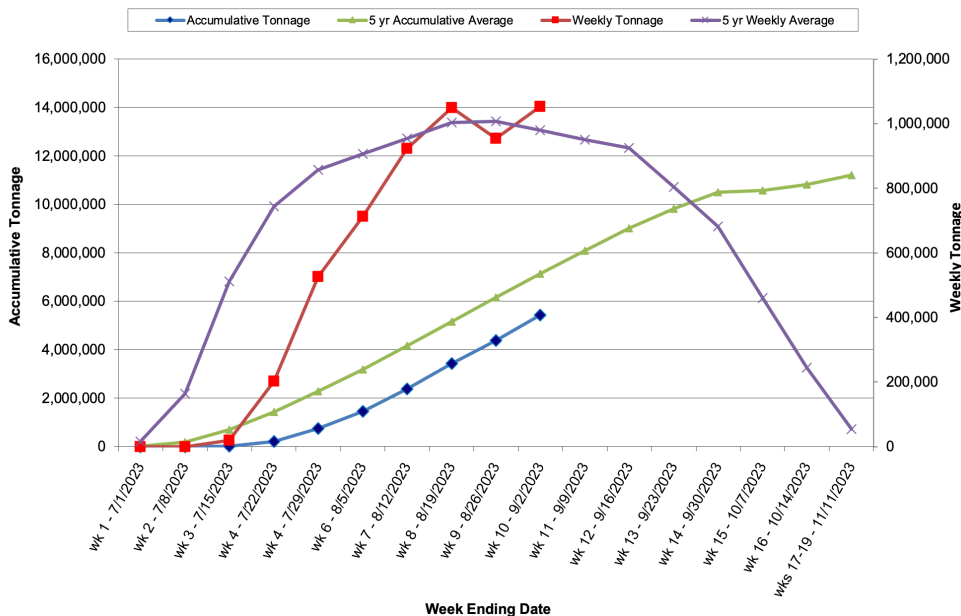
CULTIVATION AREA OF THE INDUSTRIAL TOMATO 2023 – AREA AND VOLUME

	2022	AREA 2023	EV	2022	VOLUME 2023 (May)	VOLUME 2023 (Sep)	EV
TOTAL	18.530	19.553	6%	1.632.210	2.008.675	1.767.750	8%
GOIAS	12.800	13.708	7%	1.155.650	1.444.000	1.285.000	11%
SÃO PAULO	3.100	3.075	-1%	226.300	281.675	222.750	-2%
MINAS GERAIS	2.630	2.770	3%	250.260	283.000	260.000	4%

CALIFORNIA

The estimate is to process 1,040,983 short tons (943,472 metric tonnes) this week. At the end of this week (week ending 16 September) we will have processed 7,511,983 short tons (6,813,865 metric tonnes). There is no change from previous report.

Five Year Average | California Tomato Tonnage



CANADA

Harvest is approximately 40% complete. The weather this year has caused some areas to experience rot and/or disease, while in other areas the crop looks good. It is anticipated contract tonnage will be achieved.

JAPAN

In the **Tohoku** region, harvests have decreased due to disease caused by abnormally high temperatures and drought. Consequently, the total volume of tomatoes to be processed is reduced from 30.100 tonnes to 28.000 tonnes.

SOUTH AFRICA

The South African season ended in September and thus delivered a 160.000 tonnes fresh tomato harvest for the 2023 season. The season was divided as a 30% summer crop delivered @ 5.5 brix and a 70% winter harvest delivered at a 4.85 brix level. This allows South Africa to a nearly all year tomato growing season and the potential to harvest over a 9-month period.