

WPTC CROP UPDATE AS OF 26 OCTOBER 2023

AMITOM COUNTRIES

EGYPT

The total expectation for the country remains 600,000 tonnes in 2023. Small volumes will be processed in through the winter from the Nili crop.

FRANCE

The season ended on 9 October in the South-East with a total volume close to 160,000 tonnes, which is 99% of the 163,000 tonnes contract. Average total yields were 71 t/ha from the 2,230 hectares planted. While 99% of the conventional volume was processed (143,000 tonnes), only 85% of the contracts for organics were fulfilled, to 17,000 tonnes, due to reduced yields of an average of 45 t/ha.

GREECE

The 2023 crop was perfect until 6 September when the heavy rains and floods caused the loss of about 15% of the expected volume. The final crop was 390,000 tonnes. It is expected that the volume may decrease in 2024.

HUNGARY

The final volume was slightly higher than expected at 110,000 tonnes due to mostly good weather not too hot and not too cold, with some manageable rains during the season. Average brix was good at c. 5.

IRAN

In the absence of reliable data, opinions diverge on the total volume processed in the country, but it is estimated at about 2 to 2.3 million tonnes, slightly up from 2022.

ITALY

It was a strange and long season with 15 factories in the south still working last week, with a few remaining open now, which is very unusual. It was a peculiar season especially in the south with some very long crop cycles of up to 130 days instead of 100 to 110 days with some split maturation and also some very high and some very low yields. Organic yields were generally lower than usual.

In the north the final volume was a shave under 2.8 million tonnes.

The final total volume is not yet available but will probably be between 5.35 and 5.4 million tonnes.

PORTUGAL

The harvest started early on 16 July and ended on 7 October with a final production estimated at 1.5 million tonnes, pending the final volume from two factories. Yields at the start were not good but got better in August although all types of weather affected fields during the season wit hot, cold, rain, ...

SPAIN

The initial expectation was that the volume processed in 2023 would be between 2.7 and 2.75 million tonnes. The harvest started well but rains in September reduced yields, so the final volume is expected to be around 2.6 million tonnes. The season was longer than usual in Extremadura where it ended on 10 October. In Andalusia, the lack of water had reduced the surfaces and high temperatures further reduced production.

It is too early to estimate volumes for 2024 but the current lack of water could be an issue again.

TUNISIA

The final volume processed is 675,000 tonnes, with the following details:

		2022	2023
Surface planted (Ha)	Seasonal	12 671	10 914
	Late	1 800	2 300
National production (T)		970 000	900 000
Number of opened factories		19	18
Start of the season		01 July	
Volume processed (T)		650 000	675 000
Volume of 23/30 paste processed (T)		100 000	102 000

TURKEY

The final production remains estimated at 2.7 million tonnes as was forecast. It was a long crop but with no specific issues.

UKRAINE

The final production should be about 500,000 tonnes, or a bit lower, when the harvest finishes at the end of the week.

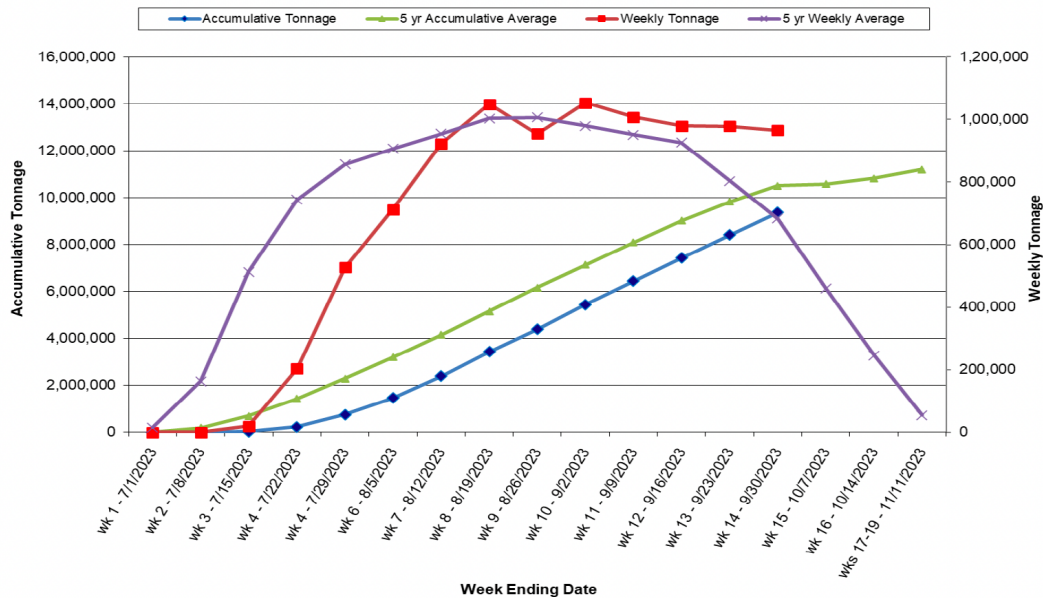
OTHER WPTC MEMBERS IN NORTHERN HEMISPHERE

CALIFORNIA

The harvest is still ongoing with 600,000 short tons expected to be processed this week and smaller volumes next week. The total volume is expected to reach 12.6 to 12.7 million short tons (11.4 to 11.5 million metric tonnes), with 11.8 million short tons (10.7 million metric tonnes) already processed as of 21 October.

It has been a good crop overall with field yields averaging 48 short tons per acre (107 t/ha) but very challenging logistically with issues during transplanting, unseasonable rains in the south in August, and a very late crop with large volumes processed after the end of September.

Five Year Average | California Tomato Tonnage



CANADA

The 2023 season was pretty good and on schedule despite about 25% of the fields frosted in the spring and having to get replanted. The summer was good but cooler than usual with a later start to the harvest. The preliminary total delivered tonnage is 572,925 short tons (519,750 metric tonnes) which is 98% of the 583,809 short tons (529,622 metric tonnes) that were contracted. Average solids was 4.5.

CHINA

Because some areas were not contracted and had not been included in the pre-season statistics, and the warm autumn has extended the production season by about a week, the total processing volume of the 2023 crop is 8 million tonnes, instead of the 7.3 million tonnes earlier forecast, an increase of 29% compared to the 6.2 million tonnes in the 2022 crop.

The breakdown is:

- 4.78 million tons in Northern Xinjiang,
- 1.63 million tons in Southern Xinxiang,
- 0.08 million tons in Gansu and Ningxia,
- 1.51 million tons in Inner Mongolia.

100 factories were running, an increase of 10 compared to the 2022 crop, reaching a historic high with a daily processing capacity of the running factories of 0.24 million tons of fresh tomatoes, an increase of 20% compared to the 2022 crop.

The 2023 crop was a very unusual crop:

- Spring snow, high temperature during the blooming stage, early harvest before maturity, long-distance transportation, and small early fruits, the average yield per mu has decreased.
- Industrial yield has increased, resulting in an increase in production costs.
- Due to the fact that the demand for raw materials in running factories exceeded the supply of raw materials, the competition for raw materials in 2023 crop was very fierce, pushing up the prices of raw materials. The average purchase price of raw materials in Chinese production areas was 95 USD/t.

(see details in the slides below and the video posted at <https://vimeo.com/879434100/0028a350b3>)

JAPAN

Harvesting in Japan ended with a volume of 26,000 tonnes.

OTHER WPTC MEMBERS IN SOUTHERN HEMISPHERE

ARGENTINA

The total surface is expected to be up 3 to 4% from 2023 at 8,200 hectares for an expected production of 660,000 tonnes. Planting is underway and already at 50% in Rioja and San Juan regions. The weather has been good to date although some wind is expected next weekend which could damage the young seedlings already in the fields. A good 2024 season is expected after weather issues (storms, hail, ..) reduced production in 2023.

AUSTRALIA

After the disastrous 2023 processing season with 110,000 tonnes processed out of an initial intention of 241,000 tonnes, 260,000 tonnes are expected in 2024. To date, 55% of the planned 2,716 hectares have been planted. The season is on schedule and looks promising. Only a small volume is organic, with 1,845 tonnes processed this year.

BRAZIL

The season is nearly finished with only two or three plants still running. The total crop size should be close to 1.65 million tonnes which is lower than expected, largely due to weather problems during transplanting and rains during the harvest. Brix is also significantly lower than usual at 4.3 to 4.4 ° on average.

The new organization Tomate BR is trying to organize the sector and collect information, but the three largest processors are not part of the organization which makes it difficult.

CHILE

The planting projections for the 2024 season are a total surface of 14,750 hectares with a production estimate of 1.4 to 1.5 million tonnes.

The transplant began in mid-September in the northernmost areas, with some delay in some areas due to heavy rains and flooding at the end of September. The transplants are expected to continue until the end of November. Regarding the current climate, it is normal for spring with cold afternoons and days with average temperatures around 20 Celsius. Good availability of water is expected during the summer, due to a rainier winter in the last 10 years and with good snow accumulation.

PERU

A total volume of 150,000 tonnes is expected to be processed during the 2023/24 crop which will run from October until March, the same as in 2022/23.

SOUTH AFRICA

The 2023 season ended on a 160 000-metric tonnes harvest. In the Western Cape region, transplanting already started for the 2024 summer harvest.

OTHER COUNTRIES

BULGARIA

According to company Balkan Ag a total of 37,000 tonnes were processed in Bulgaria in 2023, lower than expected. The season was affected by labour shortage in the agricultural sector and by weather issues, and notably high humidity and low temperatures.

POLAND

According to information received from processor JAMAR, the total volume processed in Poland in 2023 should be about 250,000 tonnes. There has been significant investment in new capacity by the four main processors in the last year as below:

	"old" production capacity fresh tomato [mt/24h]	"new" production capacity fresh tomato [mt/24h]	fresh tomato processing capacity during the season [average 48d]	our estimation of frsh tomato processing capacity during 2023 season [mt]	capacity calculated into concentrate TP 36/38 brx [mt]
HEINZ Pudliszki	800	2 500	120 000	90 000	13 250
MASPEX	600	1 000	48 000	35 000	5 153
DAWTONA	1 000	2 500	120 000	80 000	11 778
JAMAR	500	950	45 600	45 000	6 627
	2 900	6 950	288 000	250 000	36 808

+ 140%

RUSSIA

The total volume processed is currently estimated at 660.000 tonnes or slightly more. This is higher than the initial forecast 650.000 tonnes and the mid-season volume planned at the beginning in August of 670.000 tonnes. It was a tough tough season as processors faced all the expected difficulties starting from shortage of imported seeds, components and spare parts for machinery and equipment, up to longer and more expensive logistics, deliveries, and payments. Add every year weather surprises and some fruit diseases. This looks like a regular season for a further 1-2 years in the fight for the harvest.

**World Processing
Tomato Council**

		2021 FINAL		2022 FINAL		2023 PRELIM		AVERAGE 2020-2022	VARIATION 2023 vs 2022	
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Egypt	440	Mem.	456	Mem.	600	Mem.	499	32%
		France	164	Mem.	142	Mem.	160	Mem.	155	13%
		Greece	420	Mem.	340	Mem.	390	Mem.	383	15%
		Hungary**	115	Mem.	80	Mem.	110	Mem.	102	38%
		Iran**	1 300	Est.	1 800	Mem.	2 000	Mem.	1 700	11%
		Israel	200	Est.	200	Est.	200	Est.	200	0%
		Italy	6 059	Mem.	5 476	Mem.	5 400	Mem.	5 645	-1%
		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.	675	Mem.	755	4%
		Turkey	2 200	Mem.	2 350	Mem.	2 700	Mem.	2 417	15%
Ukraine**	800	Mem.	120	Mem.	500	Mem.	473	317%		
Subtotal AMITOM		17 466		15 197		16 883		16 515	11%	
of which members in EU		11 546		9 582		10 168		10 432	6%	
OTHER MEMBERS	Brazil	1 525	Mem.	1 632	Mem.	1 650	Mem.	1 602	1,1%	
	Canada	399	Mem.	548	Mem.	530	Mem.	492	-3%	
	California	9 761	Mem.	9 514	Mem.	11 470	Mem.	10 248	21%	
	China	4 800	Mem.	6 200	Mem.	8 000	Mem.	6 333	29%	
	Japan	28	Mem.	27	Mem.	26	Mem.	27	-4%	
	Subtotal Other Members	16 513		17 921		21 676		18 703	21,0%	
NON MEMBERS	Algeria*	1 000	Misc.	1 200	Misc.	1 350	Misc.	1 183	13%	
	Bulgaria	40	Est.	40	Est.	37	Est.	39	-8%	
	Czech Republic	25	Est.	25	Est.	25	Est.	25	0%	
	Morocco*	100	Est.	100	Est.	100	Est.	100	0%	
	Poland	175	Est.	175	Est.	250	Misc.	200	43%	
	Russia*	523	Mem.	638	Mem.	660	Misc.	607	3%	
	Slovakia	20	Est.	20	Est.	20	Est.	20	0%	
	USA excluding California	462	Misc.	450	Misc.	450	Misc.	454	0%	
Subtotal Non Members	2 345		2 648		2 892		2 628	9%		
Total Northern Hemisphere		36 324		35 766		41 451		37 847	15,9%	
SOUTHERN HEMISPHERE	MEMBERS	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%
	Subtotal members		2 248		2 069		2 156		2 158	4,2%
	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 Southern Hemisphere		2 860		2 683		2 743		2 762	2,2%	
GENERAL TOTAL		39 184		38 449		44 194		40 609	14,9%	
of which members of the WPTC		36 227		35 187		40 715		37 376	15,7%	
WPTC as percentage of total production		92%		92%		92%		92%	0,7%	

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

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