



wptc

World Processing  
Tomato Council

## WPTC CROP UPDATE AS OF 29 MARCH 2024

### AMITOM COUNTRIES

#### BULGARIA

In an effort to extend the length of the season to hopefully 70 days, planting will start earlier than usual on 4 April with most surfaces to be planted between 20 April and mid-June. Contract have not been signed yet, but prices will be between 115 euros and 125 euros depending on time of harvest and brix. Total surfaces should increase by about 10% for a total production estimated at 44,000 tonnes.

#### EGYPT

Currently, the late winter crop is being processed and quality looks exceptional in terms of colour. The harvesting of the summer crop expected to start in May and the forecast remains the same.

#### FRANCE

The surface planted should be about 2,400 hectares, of which only 300 hectares of organic (50% less than two years ago) for a total production expected at about 190,000 tonnes, 174,000 tonnes conventional (+21%) and 18,000 tonnes organic (-12%). This would mean that factories are at full capacity this year. It is currently raining causing a small delay in the planting which is just starting. The price is similar to last year at about 140 euros in the south-east, a bit lower in the south-west.

#### GREECE

Planting is starting and is helped by high temperatures of up to 28°C this week. Farmers are keen to plant tomatoes and prices range between 135 and 155 euros depending on dates and factory with an average of 143-145 euros delivered. The forecast remains unchanged at 480,000 tonnes.

#### HUNGARY

There will be 1,600 ha of tomatoes planted with an expected production of 120,000 to 125,000 tonnes. Sowings for seedlings started mid-March. After cold mornings, 25°C is expected for the weekend.

#### ISRAEL

In the absence of better information, the forecast remains 200,000 tonnes.

#### ITALY

In the North, farmers have a good attitude to plant tomatoes due to the level of price for competitive crops. There was abundant rainfall in recent months and water

availability is very good this year. Planting operation should start next week, but recent rainfall may postpone by 5- 7 days. The negotiation stalled: the request from the POs is 147 euro/t while the price offered is 125 euro/t ex field.

In the South, negotiations have not started, as operators are waiting for the price in the north, but ANICAV sent a letter to growers stating some requests on penalties for both sides if contracts not adhered to, on the need to plant more round varieties compared to long ones and to reduce the length of the season to better use the large capacity of the factories and thus reduce costs of processing. The water situation is better with 145 million cubic metres in the Occhito dam, which is lower than usual but enough for a good crop, especially as rain is expected in the next couple of weeks.

The total forecast for Italy remains about 5.6 million tonnes.

## **PORTUGAL**

There is no change to the forecast which remains 1.5 million tonnes. The weather has recently been cold and rainy, and it will probably delay the start of planting by at least a week. The price of tomatoes this year will range from 115 to 145 euros, delivered.

## **SPAIN**

In Extremadura, heavy rain in the last two days have postponed the planting which should have started this week but will probably be delayed by 7 to 10 days. Water availability in the region is normal and the surfaces planted should increase, although there is no official figure yet.

In Andalusia, planting started last week with about a week delay due to rain and cold weather. The water situation in the region has improved and the surface planted will increase this year, with one factory which has not opened in the last two season schedule to process this year, although another one should remain close.

The total estimate for Spain is raised to 2.8 million tonnes. Tomato price was negotiated individually by companies this year and range from 133 to 155 euros.

## **TUNISIA**

Even with the improvement in the overall volumes of water in the dams of 867.5 million m<sup>3</sup> on 25/03/2024 (compared with 730.5 million m<sup>3</sup> in 2023), the Ministry of Agriculture, Water Resources and Fisheries will continue to prohibit the planting of vegetable crops in the public irrigated areas, mainly in the governorates of Jendouba and Béja. Considering areas already planted and orders placed with nurseries, the forecast planting area is 13,000 hectares for a volume to be processed of 800,000 tonnes.

## **TURKEY**

The weather is currently cool and cloudy the temperatures should rise to the high 20°C in the Izmir area in the next few days which will be speed plant development. Farmers are keen to plant tomatoes, and the forecast remains 2.7 million tonnes. The winter was mild with not much snow or frost so there is an increased risk of diseases and viruses which could affect yields this year. The average price is 3700 TRL delivered (currently

106 euros), but brix and processing yields are usually lower than in other European regions.

## **UKRAINE**

Transplanting should start at the end of April. Weather conditions are good. There are no issues with availability of fertilisers and crop protection supplies although there are difficulties with logistics due to the Polish border closing. It is expected that circa 600,000 tonnes could be processed in 2024.

## **OTHER NORTHERN HEMISPHERE COUNTRIES**

### **CALIFORNIA**

Planting this season has begun on schedule and the conditions have been ideal to date. Overall, the weather has cooperated and should be considered normal for this time of year. Price negotiations continue at this time for 2024. NASS will release the next crop update in May and the estimate for acreage and tonnage will be revised accordingly at that time.

### **JAPAN**

The 2024 crop estimate is for a total volume of 27,000 tonnes to be processed from a surface planted of 475 ha. In Japan, as growers are aging and it is difficult to increase the area, all processors are focusing on increasing yield.

## **SOUTHERN HEMISPHERE COUNTRIES**

### **ARGENTINA**

Our latest forecast, after some hailstorms and rains is 660.000 tonnes. The final number will however be released in around 40 days.

### **AUSTRALIA**

Australia have experienced a favourable harvest period, with very few weather delays. The revised forecast for this season sits at 208,000 tonnes. So far, approximately 160,000 tonnes have been processed, with Brix averaging around 5.5. The expected finish date is the 19<sup>th</sup> of April.

### **SOUTH AFRICA**

A harvest of 160,000 tonnes is planned for 2024 season and all is still on schedule. Currently 30,000 tonnes have been processed. Heatwaves and Tuta are the main issues in the summer production areas. The winter production areas are still in the late transplanting stages.

		2022 FINAL		2023 FINAL		2024 FORECAST		AVERAGE 2021-2023	VARIATION 2024 vs 2023	
<b>NORTHERN HEMISPHERE</b>	<b>MEMBERS IN MEDITERRANEAN AREA (AMITOM)</b>	Bulgaria	40	Est.	37	Mem.	44	Mem.	39	19%
		Egypt	456	Mem.	600	Mem.	600	Mem.	499	0%
		France	142	Mem.	160	Mem.	190	Mem.	155	19%
		Greece	340	Mem.	390	Mem.	480	Mem.	383	23%
		Hungary**	80	Mem.	110	Mem.	125	Mem.	102	14%
		Iran**	1 800	Mem.	2 000	Mem.	1 900	Mem.	1 700	-5%
		Israel	149	Mem.	197	Mem.	200	Mem.	182	2%
		Italy	5 476	Mem.	5 400	Mem.	5 600	Mem.	5 645	4%
		Malta**	5	Mem.	8	Mem.	8	Est.	7	0%
		Portugal***	1 414	Mem.	1 500	Mem.	1 500	Mem.	1 503	0%
		Spain***	2 125	Mem.	2 600	Mem.	2 600	Mem.	2 637	0%
		Syria**	40	Est.	40	Est.	40	Est.	40	0%
		Tunisia	649	Mem.	795	Mem.	800	Est.	795	1%
		Turkey	2 350	Mem.	2 700	Mem.	2 700	Mem.	2 417	0%
Ukraine**	120	Mem.	500	Mem.	600	Mem.	473	20%		
<b>Subtotal AMITOM</b>		<b>15 186</b>		<b>17 037</b>		<b>17 387</b>		<b>16 576</b>	<b>2%</b>	
of which members in EU		9 582		10 168		10 503		10 432	3%	
<b>OTHER MEMBERS</b>	Brazil	1 632	Mem.	1 650	Mem.	1 650	Est.	1 602	0%	
	Canada	548	Mem.	520	Mem.	530	Mem.	489	2%	
	California	9 514	Mem.	11 556	Mem.	10 500	Mem.	10 277	-9%	
	China	6 200	Mem.	8 000	Mem.	11 000	Mem.	6 333	38%	
	Japan	27	Mem.	26	Mem.	27	Mem.	27	4%	
	<b>Subtotal Other Members</b>	<b>17 921</b>		<b>21 752</b>		<b>23 707</b>		<b>18 729</b>	<b>9,0%</b>	
<b>NON MEMBERS</b>	Algeria*	1 200	Misc.	1 350	Misc.	1 350	Est.	1 183	0%	
	Czech Republic	25	Est.	25	Est.	25	Est.	25	0%	
	Morocco*	100	Est.	100	Est.	100	Est.	100	0%	
	Poland	175	Est.	250	Misc.	250	Est.	200	0%	
	Russia*	638	Mem.	660	Misc.	650	Misc.	607	-2%	
	Slovakia	20	Est.	20	Est.	20	Est.	20	0%	
	USA excluding California	450	Misc.	475	Misc.	475	Est.	462	0%	
<b>Subtotal Non Members</b>	<b>2 608</b>		<b>2 880</b>		<b>2 870</b>		<b>2 598</b>	<b>0%</b>		
<b>Total Northern Hemisphere</b>		<b>35 715</b>		<b>41 669</b>		<b>43 964</b>		<b>37 903</b>	<b>5,5%</b>	
<b>SOUTHERN HEMISPHERE</b>	<b>MEMBERS</b>	Argentina	626	Mem.	586	Mem.	660	Mem.	603	12,6%
		Australia	227	Mem.	110	Mem.	208	Mem.	190	89,1%
		Chile	971	Mem.	1 150	Mem.	1 400	Mem.	1 098	21,7%
		Peru	125	Mem.	150	Mem.	150	Mem.	132	0,0%
		South Africa	120	Mem.	160	Mem.	160	Mem.	135	0,0%
	<b>Subtotal members</b>	<b>2 069</b>		<b>2 156</b>		<b>2 578</b>		<b>2 158</b>	<b>19,6%</b>	
	<b>NON MEMBERS</b>	Dominican Republic	227	Est.	227	Est.	227	Est.	227	0,0%
		India	162	Est.	162	Est.	162	Est.	162	0,0%
		Mexico	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	52	Misc.	25	Misc.	25	Est.	42	0,0%
		Senegal	73	Est.	73	Est.	73	Est.	73	0,0%
Thailand		40	Est.	40	Est.	40	Est.	40	0,0%	
Venezuela	20	Est.	24	Misc.	14	Misc.	21	-41,7%		
<b>Subtotal non members</b>	<b>614</b>		<b>591</b>		<b>581</b>		<b>606</b>	<b>-1,7%</b>		
<b>Total Southern Hemisphere</b>		<b>2 683</b>		<b>2 747</b>		<b>3 159</b>		<b>2 763</b>	<b>15,0%</b>	
<b>GENERAL TOTAL</b>		<b>38 398</b>		<b>44 416</b>		<b>47 123</b>		<b>40 666</b>	<b>6,1%</b>	
of which members of the WPTC		35 176		40 945		43 672		37 463	6,7%	
WPTC as percentage of total production		92%		92%		93%		92%	0,5%	

**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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