

WPTC CROP UPDATE AS OF 17 MAY 2024

AMITOM COUNTRIES

EGYPT

The harvest of the early summer crop started in early May and temperatures are currently good with 30-32°C during days and 20-23 °C at night so the outlook is good. Due to the increased processing capacity, contracted surfaces have increased by 23% and the total 2024 forecast from 600,000 tonnes to 780,000 tonnes.

Price is about 130 USD/t (120 EUR/t) delivered. There is no issue with water availability either from the underground or from the Nile River.

FRANCE

The very unstable weather with rain, wind and changes in temperatures is delaying plantings. Although these started early on 18 March, to date only about 50% of the surfaces have been planted. More rain is expected this week and next week. It is possible that not all of the planned 2,400 ha will be planted, and in the fields, transplants are developing slowly. Harvest will probably only start at the very end of July with most of the production expected at the end of August.

Average field gate prices are about 140 euros in the south-east and 115 euros in the south-west.

GREECE

Contrarily to the west of Europe, Greece has been experiencing a very warm spring which enabled early planting. About 80 to 85% of the surfaces have been planted to date and all should be done by the end of May. Conditions are very good, with some helpful rains after planting, which means that harvest should start early around 15-20 July and the forecast is increased from 480,000 tonnes to 500,000 tonnes. As reported before, prices range from 135 to 155 euros delivered, with an average of 143 euros.

HUNGARY

After having slight issues with seedling cultivation, the transplanting will be completed at 90 % by this Friday. Direct sowing was already completed which represents ca. 200 hectares from the total 1,300 hectares. So far, the spring weather has been rather poor in precipitation in Hungary.

ITALY

In the North, the situation is similar to France with a start of planting in early April but important delays due to rain with only about 50 to 55% of surfaces planted to date. Planting should only finish mid-June. On 15 and 16 May there were abundant rainfall spread across the entire Po Valley. Plant growth is not too good with the canopy not developing well due to the low temperatures. The outlook is not positive at the moment with delays of up to 1 or 2 weeks expected in the harvest. Prices for raw material have been set by the cooperative at 135 to 140 euros field gate, while for private companies represented by ANICAV there is a proposal

around 130 euros ex field (+ the 1 euro for services) with some late premium (1 Euro/t/day more starting from 12th Sept with a max of 15 Euro/t premium).

In the South, planting is progressing well as there has been less rain. In Puglia, however, low water availability will mean a reduction in surfaces which will not be fully compensated in other areas. Prices negotiations will start in a couple weeks of the price in the north is not yet agreed. Costs are higher than in the north, notably due to the delivery in bins, and prices usually 5 euros higher.

The total forecast for Italy remains about 5.6 million tonnes for the time being.

PORTUGAL

The weather has been unstable all spring with some warm days but other cold, cloudy, windy and some rain. At the end of March, many fields were too wet which delayed transplant for 2 weeks. Planting started then in the second week of April on a more regular basis. Since that time until today we are about 54-56% of the surface planted, with some transplants which had waited too long in the nurseries. Plant development in fields is slowed by the low temperatures but for now is good during the transplant phase. The forecast is unchanged.

SPAIN

In Extremadura, the transplanting has been delayed between 10 to 15 days by the rains. It should finish by the end of the month. Temperatures have been rather cool, so the development of the plants has been slow. There are worries that this may cause a concentration of the ripening of early and medium tomato in the second half of August.

In Andalucía, the transplanting was also delayed by the rains but not so much and is finishing these days). A late start of the campaign is expected.

In the North, things seem to go pretty smooth and on schedule so far.

The overall forecast remains 2.8 million tonnes.

TUNISIA

As of 13 May, the overall water stock at the dams was 797 million m³ compared with 677 million m³ at the same date last year, i.e. 34% of storage capacity. In view of this situation, and despite the slight improvement compared with the same period last year, water availability remains limited, which means that a similar result than last year in terms of production and processing is expected.

So far, initial estimates of the area planted remain unchanged from last year, at around 12,000 ha. The ripening of tomatoes in the various regions will coincide with the Aïd el Adh'ha festival (mid-June) which could delay the harvest.

TURKEY

As in Greece, the weather has been good and warm in the south and the plants are developing well. An early start of the harvest is expected. In the north, however, the planting has slowed due to cooler weather and depending on later weather there may be a gap between the harvest in the south and in the north. The forecast remains unchanged.

UKRAINE

Planting has started two days later than planned and is now going according to the plan. About 45% of tomatoes have been transplanted. The weather conditions are mostly comfortable, but low night temperatures and the risk of frost slowing down the growth of seedlings in the field. We expect a stabilization of temperatures to normal ones. The forecast remains 600,000 tonnes.

OTHER NORTHERN HEMISPHERE COUNTRIES

CALIFORNIA

The next NASS/USDA estimate should be released towards the end of May at that time we will adjust the projected acreage and tonnage accordingly. Planting should be completed in the next 10-15 days overall. The planting season has been very good this season with the weather cooperating for the most part. As of today, the earlier plantings appear to be looking very good and we expect harvest to start on time (first week of July). Since the last update, the conventional price has been agreed to by the industry at \$112.50 per short ton (115.7 euros per metric tonne) for 2024.

CANADA

Planting started last week. The weather has been warm, with periods of rain. Preliminary contract volumes are 561,100 short tons (509,000 metric tonnes) over 12,170 acres (4,900 hectares). While it's very early in season, harvest typically begins mid-August.

JAPAN

Transplanting in the Kanto and Chubu regions is almost complete. The weather is mild throughout the country, and growth is generally going well. There is no change from the last report in expected surface (475 ha) and the total volume of tomatoes to be processed (27,000 tonnes).

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

Argentina hits a new record production of 640,822 tonnes led by San Juan with 307,534 tonnes, Mendoza 238,320 tonnes, La Rioja 50,000 tonnes and NOA 44,968 tonnes. The average yield in the country is 81.7 t per ha.

AUSTRALIA

There were good periods during planting and harvest, but the extreme weather events between 24th Dec and 8th Jan caused flooding, hail, wind damage, growth delays, diseases, weed issues. This period of harsh weather is the major cause for not achieving initial forecast of 260,000 tonnes with only 209,603 payable tonnes processed. The area harvested was 2620 ha with an average yield of 80 t/ha and a brix average of 5.5.

BRAZIL

The Brazilian industrial tomato faces another challenging year due to difficult weather conditions:

- High temperatures in January, February and March contributed to the migratory bridge of virus-transmitting agents (whitefly) from crops such as soybeans, which severely attacked the first transplanted crops, causing great damage and even making cultivation unfeasible, including the eradication of areas already transplanted due to the high viral load in the plants;
- Heavy rains during the months of March combined with high temperatures considerably delayed transplanting, causing losses of seedlings in nurseries and consequently holes in transplanting schedules, which should have reduced areas so that harvests do not enter in the months of greater climatic risks.
- Even with the major challenges, yields are expected to be better than 2023, which was the worst productivity year of the decade, thus returning to the volume of 2022.

The surface planted will be just over 19,000 hectares, differing from the initial projections of an increase of 7% of the surfaces planted in 2023, for an expected production of about 1.7 million tonnes. New updates will be made at the end of May 2024.

BRAZIL INDUSTRIAL TOMATO CROP AREA 2024 - AREA AND VOLUME

	AREA (ha)				VOLUME (tonnes)			
	2023	2024 Jan	2024 April	Variation 2023-2024	2023	2024 Jan	2024 April	Variation 2023-2024
GOIAS	13.708	14.950	13.800	1%	1.118.000	1.369.500	1.209.150	8%
SÃO PAULO	3.075	3.250	2.850	-7%	195.000	273.950	236.600	21%
MINAS GERAIS	2.770	2.770	2.770	0%	208.000	268.100	268.100	29%
TOTAL	19.553	20.970	19.420	-1%	1.521.000	1.911.550	1.713.850	13%

CHILE

As was previously reported, this season has been especially long, due to cold temperatures in November and December that caused a later than expected start to the harvest. The original harvest end estimate was the end of April, but it has been extended until mid-May due to the rains that occurred on April 21 and 29, and the first days of May. It is anticipated that this will cause a drop in the country's estimated performance, which has not yet been fully measured, but estimated at something less than 1.3 million. This week some factories are still processing the last hectares of tomatoes.

PERU

Plans are to process between 140,000 and 150,000 tonnes between October 2024 and February 2025.

SOUTH AFRICA

South Africa planned a 160,000-tonne harvest for the 2024 season and the volumes keep on schedule. To date 73,000 tonnes have been processed. The summer production ended well on scheduled volumes in the Western Cape. The winter crop started, and the producers mainly battle with Tuta control and viral infestations in the northern production areas.

		2022 FINAL		2023 FINAL		2024 FORECAST		AVERAGE 2021-2023	VARIATION 2024 vs 2023	
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	40	Est.	37	Mem.	44	Mem.	39	19%
		Egypt	456	Mem.	600	Mem.	780	Mem.	499	30%
		France	142	Mem.	160	Mem.	190	Mem.	155	19%
		Greece	340	Mem.	390	Mem.	500	Mem.	383	28%
		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.	2 800	Mem.	2 637	8%
		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%		
Subtotal AMITOM		15 186		17 037		17 787		16 576	4%	
of which members in EU		9 582		10 168		10 723		10 432	5%	
OTHER MEMBERS	Brazil	1 632	Mem.	1 650	Mem.	1 713	Mem.	1 602	4%	
	Canada	548	Mem.	520	Mem.	509	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%	
	Subtotal Other Members	17 921		21 752		23 749		18 729	9%	
NON MEMBERS	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%	
Subtotal Non Members	2 608		2 880		2 870		2 598	0%		
Total Northern Hemisphere		35 715		41 669		44 406		37 903	7%	
SOUTHERN HEMISPHERE	MEMBERS	Argentina	626	Mem.	586	Mem.	641	Mem.	603	9%
		Australia	227	Mem.	110	Mem.	210	Mem.	190	91%
		Chile	971	Mem.	1 150	Mem.	1 300	Mem.	1 098	13%
		Peru	125	Mem.	150	Mem.	150	Mem.	132	0%
		South Africa	120	Mem.	160	Mem.	160	Mem.	135	0%
	Subtotal members	2 069		2 156		2 461		2 158	14%	
	NON MEMBERS	Dominican Republic	227	Est.	227	Est.	227	Est.	227	0%
		India	162	Est.	162	Est.	162	Est.	162	0%
		Mexico	40	Est.	40	Est.	40	Est.	40	0%
		New Zealand	52	Misc.	25	Misc.	25	Est.	42	0%
		Senegal	73	Est.	73	Est.	73	Est.	73	0%
Thailand		40	Est.	40	Est.	40	Est.	40	0%	
Venezuela	20	Est.	24	Misc.	14	Misc.	21	-42%		
Subtotal non members	614		591		581		606	-2%		
Total Southern Hemisphere		2 683		2 747		3 042		2 763	11%	
GENERAL TOTAL		38 398		44 416		47 448		40 666	7%	
of which members of the WPTC		35 176		40 945		43 997		37 463	7%	
WPTC as percentage of total production		92%		92%		93%		92%	1%	

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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