

WPTC CROP UPDATE AS OF 23 AUGUST 2024

AMITOM COUNTRIES

BULGARIA

The season is progressing well with about 25% of the harvest done with yields of about 60 t/ha and a brix of 5.1. The high temperatures of the last two weeks are causing some sunburn and red mites but there is no blossom end rot thanks to use growth regulators with calcium. Harvest should finish on 5 to 10 October with a total volume of 60,000 tonnes.

EGYPT

Nothing changed so far since the last update two weeks ago, monitoring closely the current harvesting progress & processing, crop development and climate conditions as well. We will see what the situation in the next weeks will be.

FRANCE

To date just over 40,000 tonnes, 22% of the total forecast, have been processed in the **South-East** with the harvest just starting in the **South-West**. After heatwave, temperatures are now 28-30°C with wind in the South-East. The peak of the harvest will arrive next week with mid/late season tomatoes joining the early crop. Quality is good and yields are ok, with some spider mites. Brix to date averages 5.1 and penalties 5.6%

GREECE

The season is early with about 58% of the forecast processed already. Quality is normal with a brix of 5.1 and 5% of penalties. Some rain yesterday in the **Centre** and the **South-West** are slowing the harvest today, but the weather is generally good now.

HUNGARY

The harvested area is over a third of the total one. The average Brix is over 5. The weather is still hot and dry with short local precipitations. This July was the hottest and the 7th driest one since 1901. The total annual forecast remains unchanged.

IRAN

The harvest is still on in the **South** and has now started in the **West**, while it is delayed in the **North** where it will only start at the end of the month and mainly in September. Temperatures are still very high at around 40°C. There is about 20 to 25% less tomatoes this year and their price is very high, which processors fight as they have to compete with cheaper Chinese production on their markets. The forecast remains 1.5 to 1.6 million tonnes.

ITALY

In the North, as per the last data from the IO as of 11 August 675,000 tonnes had been processed with an average brix of 5.18 et 4.7% penalties. Last week an estimated 300,000 to 350,000 tonnes were harvested bringing the total as of 18 August to about one million tonnes, which is about 20% lower than the average of the last five years, due to the accumulated

delay due to the weather and lower yields on the early crop. The bulk of the harvest (c. 60%) will take place in September. Some rains on 18 to 20 August have stopped or slowed the harvest this week. The total volume will depend on the late harvest.

In the South, as of 11 August, 1.1 million tonnes had been processed, more than in 2023 but about the 2022 level. The brix is lower than normal. The harvest is slowed this week due to rains more on Tirrenian side (Toscana, Lazio and Campania), less on Adriatic side (Puglia). The Occhito dam is now closed bringing concern for the late crop.

The forecast remains 5.5 million tonnes, but results will depend on the weather in September.

PORTUGAL

It is now the third week of the season, and all factories are running ok with about 21% of the crop harvested to date. At the end of last week, there were three days of heatwave at 37-40°C but temperatures are now back down to 28-29°C. It is a very windy summer, but this is good as helps fight diseases and reduces temperatures at night. There is no change in the forecast.

SPAIN

All the plants are now running including in the **North** where they started around 10 to 15 August. To date only about 27% of the total forecast has been processed, which is lower than normal. Temperatures remain high in **Andalusia** and **Extremadura**, changing the normal course of the tomato cultivation but quality seems generally good. There will be strong pressure on plants from mid-September but there is no change in the forecast.

TUNISIA

Only 6 factories are still in operation, processing 4,000 tonnes a day. To date, 873,000 tonnes of tomatoes have been processed, broken down by region as follows:

- 43% in **Cap Bon**
- 14% in **Greater Tunis**
- 31% **Béja and Kef (north-west)**
- 13% **Kairouan (South)**

TURKEY

The **Bursa** region is now at its peak, but large volumes will be processed in September. The **South** is still strong with tomatoes still in the fields. Quality is generally good, but brix is lower than usual at 4.6-4.7. No change to the forecast. About 40% of the total volume expected as already been processed.

OTHER COUNTRIES

BRAZIL

The Brazilian crop is running as scheduled, with no changes ahead until now. There is tendency for higher than expected fruit brix level, but this will be confirmed in the next few weeks.

CALIFORNIA

The estimate is to process 1,054,880 short tons (956,971 metric tonnes this week. At the end of this week (week ending August 24) we will have processed 5,671,546 short tons (5,144,645 metric tonnes). Harvest continues to go well throughout the state as we are basically at overall processing capacity. At this time, yields continue to perform close to contracted levels overall. As we discussed in our previous reports, California experienced abnormally high temperatures in June and July. Based on observations in the later fields, we anticipate yields to be lower than what we have experienced so far this season, mainly due to the prior heat. The

NASS/USDA will release a new crop estimate towards the end of the August. Solids and quality of the crop continue to do well this season.

CANADA

Harvest began last week and is approximately 7% complete. The weather this week has been cooler, with warmer temperatures expected to return by the weekend. The crop to date looks OK, and it's hopeful that contract tonnage will be achieved despite this year's weather challenges and the increased disease pressure in some regions.

CHINA

The forecast is confirmed at 11 million tonnes.

JAPAN

Heavy rains in late July and a typhoon in early August may result in reduced harvests in parts of the **Tohoku** region. The total volume of tomatoes to be processed is the same from the last report at 29,000 tonnes.

		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.	60	Mem.	39	62%
		Egypt	456	Mem.	600	Mem.	663	Mem.	499	11%
		France	142	Mem.	160	Mem.	175	Mem.	155	9%
		Greece	340	Mem.	390	Mem.	500	Mem.	383	28%
		Hungary**	80	Mem.	110	Mem.	115	Mem.	102	5%
		Iran**	1 800	Mem.	2 000	Mem.	1 550	Mem.	1 700	-23%
		Israel	149	Mem.	197	Mem.	200	Mem.	182	2%
		Italy	5 476	Mem.	5 400	Mem.	5 500	Mem.	5 645	2%
		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.	900	Mem.	795	13%
		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		17 311		16 576	2%	
of which members in EU		9 622		10 205		10 658		10 471	4%	
OTHER MEMBERS	Brazil	1 632	Mem.	1 650	Mem.	1 671	Mem.	1 602	1%	
	Canada	548	Mem.	520	Mem.	509	Mem.	489	-2%	
	California	9 514	Mem.	11 556	Mem.	10 433	Mem.	10 277	-10%	
	China	6 200	Mem.	8 000	Mem.	11 000	Mem.	6 333	38%	
	Japan	27	Mem.	26	Mem.	29	Mem.	27	12%	
	Subtotal Other Members	17 921		21 752		23 642		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	Misc.	462	0%	
Subtotal Non Members	2 608		2 880		2 870		2 598	0%		
Total Northern Hemisphere		35 715		41 669		43 823		37 903	5%	
SOUTHERN HEMISPHERE	MEMBERS	Argentina	626	Mem.	586	Mem.	631	Mem.	603	8%
		Australia	227	Mem.	110	Mem.	213	Mem.	190	94%
		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		2 454		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.	39	Misc.	42	56%
		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		595		606	1%		
Total Southern Hemisphere		2 683		2 747		3 049		2 763	11%	
GENERAL TOTAL		38 398		44 416		46 872		40 666	6%	
of which members of the WPTC		35 176		40 945		43 407		37 463	6%	
WPTC as percentage of total production		92%		92%		93%		92%	0%	

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

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