

WPTC CROP UPDATE AS OF 2 MAY 2025

AMITOM COUNTRIES

(Information collected during a videocall on Wednesday 30 April)

EGYPT

The winter crop finished on 20 April and the summer harvest will start at the middle or end of May and will finish at the end of September. Today a sandstorm is expected to be followed by rains and hopefully this will not cause any damages.

The total forecast remains 780,000 tonnes.

BULGARIA

Planting started on 19 April, but temperatures have dropped this week down to 2°C with frost today in some production areas. The total forecast is increased by 3,000 tonnes to 43,000 tonnes, as one farmer will plant 500 hectares of tomatoes, when his initial plans were for 100 ha. All seedlings are normally provided by Deroni or come from Greece, but the additional plants will come from Italy.

FRANCE

There is no change of the forecast of 173,000 tonnes from 2,330 hectares. Planting is more or less on time in the South-east despite some delays due to rain in the most northern areas, but in the south-west only about 100 hectares could be planted to date due to rains, so altogether about 800 hectares (35 % of the total) are in the ground when normally it should be over 40%, so a late start of the harvest is probable.

The rains are also favouring the development of weeds for which there are fewer chemical solutions already, with more problems anticipated in future years with the withdrawal of metibruzin and pendimethaline.

GREECE

The situation is complicated due to a lack of water in the South (although it is raining there today) with the water authorities limiting irrigation authorisations. Planting there is late with only about 40 to 60% of the surfaces planted depending on areas meaning the harvest should start 10 to 12 days late.

In the Centre, it has also been a slow start with a 10 to 12 days delay but about 65% of the fields have already been planted, bringing the total to date to about 50% of the total planned surfaces to the country.

The forecast remains 450,000 tonnes but the season will start late or very slowly and will probably be short.

HUNGARY

The expected annual raw tomato quantity is unchanged at 80,000 tonnes. In the first half of the seedling cultivation, our seedlings had a harder start due to the low light period, but everything is fine by the start of transplanting, which started at the beginning of this week on

April 28 and is going according to the schedule. Precipitation is not expected to hinder the work in the following period.

IRAN

There is no significant change to our forecast, which remains at 2 million tonnes for this year. It is still too early to comment on the crop. Planting is ongoing in the South, where temperatures have been exceptionally high this week, reaching over 40°C.

ITALY

In the North, during the month of April we still had higher than normal rainfall. The cumulative value in Emilia Romagna is 360 mm and is higher than the 1991-2020 norm (230 mm). Due to this situation transplanting have some delay with a total stop in week 16 and a restart of the operation last week.

There was some flooding situation near River Po but not damages recorded on tomato fields. As of today, about 30-35 % of the fields have been planted and the operation will continue in the next weeks of May hopefully with a better weather.

The contracts have been completely concluded, and the IO recorded an increase of about 4-5% in the contracted hectares compared with last year.

The forecast remains unchanged at around 3 million tonnes.

In the South, the situation south is a bit better as there has been less rain and there is only a small delay. The main issue is with the water availability for the summer as the Occhito dam is still empty. Farmers are looking at various irrigation alternatives but the surfaces in the Foggia area of Puglia will reduce (normally about 10 000 hectares) with additional surfaces planted in Calabria (1 000 hectares this year) and Molise. There is no issue with water in Lazio, Caserta or Basilicata.

The prices agreed of 147.5 euros per tonne for round tomatoes and 155 for long represent a 7% increase compared to 2024 when the new scale of bonuses and deductions for quality are considered. This should encourage farmers to deliver fewer green with the introduction of penalties when these exceed 1%.

The forecast in the south and centre remains 2.6 million tonnes, thus the total for Italy remaining 5.6 million tonnes.

PORTUGAL

It rained a lot in April and planting only started last week when it was sunny with no rain. Some seedlings are now getting old and the effect on the crop size is unknown, but it is not usually good. It is raining today with more rain planned for the next four days so operations are stopped and should restart next week for which the forecast is good.

Altogether planting is about one month late which will mean the harvest should start around 12-15 August and continue until October. Many growers, however, may not want to take the risk of harvesting after 20 September when it often rains and may decided not to plant all of the late surfaces.

The forecast for now remains 1.4 million tonnes.

SPAIN

A very rainy March delayed planting both in Andalusia and Extremadura. It was followed by a drier first half of April in Andalusia but with rains in Extremadura where there are now more rains with 20-30 mm expected today and more in the next days. Consequently, planting operations are delayed by about three weeks in the Vegas Altas of Extremadura, but the delays could be four weeks in the Vegas Bajas where soils dry more slowly. Consequently,

some transplants which have stayed an extra 25-30 days in the greenhouses have to be cut and some will be lost. Moreover, some farmers may not want to plant late in May or June and surfaces may be reduced.

The situation is better in Andalusia where it did not rain much in April and there is only a small delay.

In view of this situation, it is difficult to make an estimate for the time being, but the production will probably be lower than the 2.6 million initial figure.

TURKEY

In the North, the planting started up last week in cool weather which is delaying the development of the seedlings. Next week the weather will warm up.

Down south the plantings are also delayed due to weather. They would have typically been over by now.

There are no losses or deductions apart from the initial reduction, just delays so far.

OTHER NORTHERN HEMISPHERE COUNTRIES

CALIFORNIA

The next NASS/USDA estimate is scheduled to be released on May 29th. At this time no major change are to be expected from the earlier estimate of 200,000 acres (81,000 hectares) and 10.2 million short tons (9.25 million metric tonnes).

Planting has been going well and on time with very few weather issues during the process. Crop looks very good for this time of year and expectation as of now is for an on time start assuming weather cooperation from now until then. Since our last update the conventional price has been agreed to by all processors at USD109 per short ton for the 2025 season (c. 105 euro per metric tonne – see report attached).

CANADA

Preliminary contract volume for 2025 is 603,000 short tons (547,000 metric tonnes). The weather has been typical of our spring season, with a mix of cooler and warmer temperatures and periods of light to heavy rainfall.

JAPAN

Both the expected surfaces planted and total volume have decreased from the last report to 420 hectares and 25,000 tonnes. In particular, the surfaces cultivated using machines for harvesting has been decreasing. This is mainly due to the fact that the average yield per unit area is not very high, leading some producers to switch to competing crops such as rice.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

The processing tomato season is ending with very good climate, contract prices were around 110 US\$, tomatoes out of contract (10% of total area) had prices around 80 US\$. The average yield of the country is 85 t/ha but many farms with harvests between January and February had around 140t/ha. The final country volume will arrive at 620.000 tonnes.

AUSTRALIA

Following a period of favourable weather conditions conducive to harvest operations, Australia successfully processed a total of 211,000 tonnes of tomatoes. The 2024/25 harvest season was officially completed by April 14th.

CHILE

The season is not over yet; the harvest end date will be during the first week of May. We have had some rain, mainly in the southern production areas, which has caused some delays and a decrease in daily volume, thus lengthening the harvest season. For this reason, we prefer to keep our last estimate reported to the WPTC unchanged. We will provide a final production figure after the season.

SOUTH AFRICA

The Western Cape summer production will end in May as winter conditions will halt the season. The winter production areas in Limpopo areas are slowly catching up due to a cooler wet season. Currently 40% of the total production has been processed and South Africa is still predicting to process 160,000 tonnes as planned. The processing season will end in October.