

Tomato processing in Greece

Greece accounts for about 10% of the tonnage processed in AMITOM countries, with 966 000 tonnes processed on average over the last five years.

The Greek industry is represented within the AMITOM by PEK, the Greek Canners Association. Established in 1945, it is a founding member of AMITOM. Its 14 members companies account for more than 90 % of the total Greek production.



Currently, most of the growing and processing is carried out in three geographical areas:

- the Northern Region (Macedonia-Thrace), with about 25% of the production;
- the Central region (Thessalia and Beotia), with about 60% of the production;
- the Peloponnese which accounts for about 15% of the production.

Greece is a very mountainous country and agricultural acreage only covers a little more of 10% of the total

surface of the country. Processing tomatoes are mainly grown in plains close to rivers and lakes or in regions surrounded by mountains. Despite that, water reserves in the recent years are diminishing due to unwise use. As a result, and although sprinkler irrigation still account for 30 %, drip irrigation is rapidly introduced and is about 50 % and still growing. Within the same region, soils vary from sand predominance to clay. Fields are still small and family managed with 5 to 20 ha per family. Seeds utilized are around 10 % standard (OP) varieties – most common are T2 type, Titano, Petogro, Agata – and 90 % hybrids – most common Heinz and Asgrow hybrids.

Direct seeding is around 40%, while the ready-made seedlings which are transplanted are catching up specially in areas looking for an earlier harvest and account for about 60 %. Machine harvesting, which was not widespread, is now being introduced at a fast rate and about 70 % of the tomatoes are mechanically harvested, while the manually comes to 30%

The changes in EU regulations have caused series of changes and the agricultural structure of the country is in a transitional period. After this restructuring will be completed, the field size should significantly increase while new agricultural techniques and mechanized harvesting will hopefully result to an even more competitive sector.

Thanks to the intensive work carried out, the yields reach now between 65 and 85 tonnes per hectare and are steadily increasing. All growers belong to local Growers' Organizations which contribute from their side to the above restructuring process.

There are currently about twenty five tomato processing factories in Greece, with the four largest handling 60 % of the total volume. As mentioned earlier, the restructuring also occurs at the factory level and one can not exclude further mergers, acquisitions and shut downs in the near future.

In 2005, the total surface for processing tomatoes was 13 000 hectares and the average yield was 65 tonnes per hectare. The price of raw materials was between 45 and 50 Euros per MT. ex field, one of the highest level in Europe.

There are two types of production in Greece:

- High quality tomato paste and other products (passata, diced, etc.) in aseptic / bulk packaging destined to the demanding industrial markets like E.U.;
- Retail pack-size mainly for the domestic market with strong brand-names. In recent years, the Greek production has significantly reduced the imports.

Over the last few years, the industry has reacted swiftly to the requirements of the export market by investing in processing and aseptic packaging equipment. It has not, however, neglected the domestic market which is growing and accounts for 8 to 10% of the processed volume. Domestic consumption of tomato products mainly involves passata, crushed and diced tomatoes and paste in small cans.

The Greek Ministry of Agriculture has always applied European Regulations with the strictest procedures, safeguarding the quality of the tomatoes entering the factories, while ensuring timely and fair payment and conditions for the growers.

| ANNEE | Production de tomates transformées (1000 tonnes) | Volume transformé (index 100 en 78) | Volume transformé (en % AMITOM) |
|--------------|---|--|--|
| 1978/79 | 1 029 | 100% | 18,50% |
| 1979/80 | 1084 | 105% | 15,80% |
| 1980/81 | 1445 | 140% | 21,50% |
| 1981/82 | 1124 | 109% | 17,00% |
| 1982/83 | 1008 | 98% | 15,20% |
| 1983/84 | 1075 | 104% | 13,10% |
| 1984/85 | 1484 | 144% | 13,90% |
| 1985/86 | 1318 | 128% | 15,10% |
| 1986/87 | 706 | 69% | 11,70% |
| 1987/88 | 825 | 80% | 13,10% |
| 1988/89 | 961 | 93% | 13,80% |
| 1989/90 | 1308 | 127% | 14,40% |
| 1990/91 | 1059 | 103% | 12,00% |
| 1991/92 | 1129 | 110% | 13,80% |
| 1992/93 | 913 | 89% | 12,50% |
| 1993/94 | 1028 | 100% | 13,60% |
| 1994/95 | 1111 | 108% | 12,50% |
| 1995/96 | 1177 | 114% | 12,50% |
| 1996/97 | 1311 | 127% | 12,60% |
| 1997/98 | 1183 | 115% | 13,90% |
| 1998/99 | 1248 | 121% | 11,40% |
| 99/2000 | 1250 | 121% | 10,20% |
| 2000/01 | 1062 | 103% | 9,60% |
| 2001/02 | 939 | 91% | 9,15% |
| 2002/03 | 860 | 84% | 11,02% |
| 2003/04 | 985 | 91% | 11,23% |
| 2004/05 | 1200 | 117% | 10,57% |
| 2005/06 | 850 | 83% | 6,50% |
| YEAR | Processing tomato production (1000 tonnes) | Evolution of the processed volume (index 100 in 1978) | Evolution of the processed volume (in % AMITOM) |