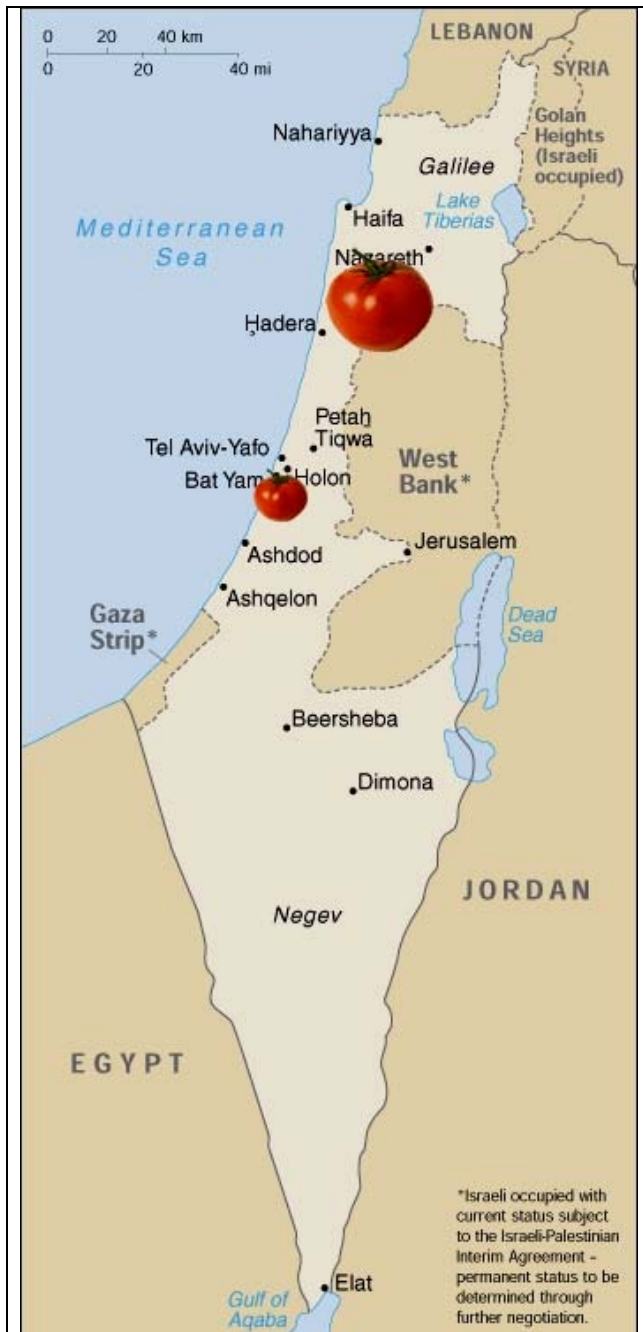


Tomato processing in Israel

Israel's tomato production represents 1.6 % of the volume processed within AMITOM. 196 400 tonnes of tomatoes were processed on average over the last five years, with large annual variations, from 139 000 MT. in 2001 up to 229 000 MT. in 2005.



Weather conditions in Israel range from the Mediterranean climate of the North to the desert aridity of the South. The cultivation of tomatoes is expanding in the North and the center of the country. A small share of the production came from the south of the country but it stopped totally as the last processing plant in the region closed in 1997. Processing tomato acreage varies greatly from year to year, with 1 600 hectares in 2001 and 2200 hectares in 2005. Several factors account for these variations : world prices of finished products, availability of irrigation water, the compared profitability of other irrigated crops such as cotton, sweet corn, sunflower or chick peas. The decreasing processing capacity is also a factor: several plants have closed in recent years, with their number declining from 10 in 1993 to 5 today.

Processing tomatoes are grown on collective farms : kibbutz and mosav, and because of the lack of work force, mechanization is extensive. Tomatoes are harvested between the 1st of June and the end of September. Farm yields are in the region of 10 tonnes / donam (100 tonnes/hectare). The most popular varieties are 5811 and LRT (American variety which gives low yield but a high rate of lycopene). Other varieties are processing, such as APTX -390.951 and Brigade.

Nearly all of the tomatoes are machine harvested; a new machine harvesting solution was designed for the early tomatoes which are obtained with plastic mulching that prevents machine harvesting. This equipment is also suitable for tomatoes grown on surfaces which are not sufficiently flat for machine harvesting, such as hillsides.

Cultivation techniques are improving, and yields with them. Water is effectively a limiting factor, both with regard to quantity and to quality. To save water, drip

irrigation is generally used. In the last few years, cultivation has developed in the general region, using underground water. There are reserves of brackish water dating from the last glacial period which constitute major water reserves that are being increasingly used. Farmers are allocated quotas for irrigation.

The price of tomatoes for processing had remained stable from 1993 to 1999, at USD/t 64.5 for 4.8° brix with premium for high dry matter content; then dropped in 2000 down to 62.5 US \$ for 4.9 – 5.0° brix tomatoes and again from 2001 to 2003 at 60 US \$ / MT. In 2005, processors paid 65 US \$ per MT. ex field.

Israeli processors manufacture a large range of tomato products but are trying more and more to produce specialties to position themselves on the international markets. In 2005, they processed 28 000 MT. of paste, 8 000 MT. of diced tomatoes, 2 600 MT. of dehydrated tomatoes and 1 000 MT. of whole peeled tomatoes.

Weather hazards, water shortages and high production costs make it difficult for the Israeli industry to remain competitive compared to other countries in the Mediterranean Basin such as Turkey.

ANNEE	Production totale de tomates	Production de tomates transformées	Evolution du volume transformé	Evolution du volume transformé	Evolution du prix des tomates fraîches
	(1000 tonnes)	(1000 tonnes)	(index 100 en 1978)	(en % AMITOM)	(US\$/100kg bord champ)
1978/79	271	161	100%	2,90%	6,8
1979/80	225	122	76%	1,80%	6,85
1980/81	258	161	100%	2,40%	7,2
1981/82	283	179	111%	2,70%	7,5
1982/83	343	235	146%	3,50%	7,5
1983/84	380	290	180%	3,50%	6,4
1984/85	351	260	161%	2,40%	6,7
1985/86	338	248	154%	2,80%	6,3
1986/87	284	188	117%	3,10%	6,2
1987/88	260	175	109%	2,80%	6,4
1988/89	248	160	99%	2,30%	7,5
1989/90	425	310	193%	3,40%	7,9
1990/91	521	360	224%	4,10%	6,8
1991/92	328	168	104%	2,10%	6,7
1992/93	326	130	81%	1,80%	6,65
1993/94	364	205	127%	2,70%	6,65
1994/95	365	254	158%	2,90%	6,55
1995/96	453	310	193%	3,20%	6,45
1996/97	411	256	159%	2,20%	6,45
1997/98	338	176	109%	2,10%	6,45
1998/99	431	267	166%	2,40%	6,45
99/2000	465	307	191%	2,50%	6,45
2000/01	386	222	138%	2,00%	6,25
2001/02	305	140	87%	1,40%	6
2002/03	385	158	98%	1,50%	6
2003/04	401	170	106%	1,38%	6
2004/05	405	285	177%	1,97%	6,4
2005/06	405	229	142%	1,75%	6,5
YEAR	Total tomato production	Processing tomato production	Evolution of processed volume % 1978	Evolution of processed volume % AMITOM	Evolution of the fresh tomato price