Tomato processing in Portugal

Portugal currently produces 9 % of the tomatoes processed in AMITOM countries, with an annual average of 953 000 tonnes over the last five years. Since the creation of the AMITOM in 1978/79, this tonnage has increased by 50 %.

Processing tomatoes are mainly produced in the plains of the river Tejo (agricultural region of Ribatejo), north-west of Lisbon where 80 % of the crop is grown, and in the south-east (the region of Alentejo) which accounts for 10 % of the crop.

Along the Tejo, small holdings are associated with intensive multiple-crop farming on the fertile soils of deep silt. The climate is ideal, with very dry summers and rains only in the spring. There is some risk of floods in April/May and it is estimated that 5 % of the fields must be replanted every 2 to 3 years. Large temperature variations between day and night enhance the color of the fruit. Agricultural production evolves very rapidly. A few years ago, almost all of the crop was produced by small farmers, « seareiros », who rented small fields (3-5 ha) and would work with their families. The small size of the farms made mechanization impossible. This type of farming now represents less than 10 % of the production. More typical modern farms of twenty or so hectares allocate one-third of their surface to tomato production, using the most recent technology. These farms produce 60 % of the tonnage. In the last few years, at the incentive of processors, cereal producers, particularly corn growers with farms of sometimes more than 100 hectares, have started producing processing tomatoes on land ranging from 10 to 90 hectares. This new type of production now represents 25 % of the tonnage and should keep increasing.

In the Alentejo region in the south, the climate is drier and cultivation is more extensive with bigger fields which could easily be mechanized. This mechanization of the harvest is currently considered a decisive factor for the competitiveness of the industry in the medium term. The workforce is becoming rare, especially as tomato harvesting coincides with that of other products. Altogether, machine harvesting now represents 85 % of the tonnage.

The main varieties are H9661, H9665, H9280, Perfect Peel. Transplanting with bare roots in the small traditional farms which produce their own plants is now the exception, but the use of plug-seedlings is developing on medium-sized and large farms, with a plant density of 30 000 plants/ha. Direct seeding only represents 10 % of the surface but it is spreading amongst medium and large producers. Traditional furrow irrigation is used in small fields, whereas medium and large growers use drip irrigation. Thanks to constant care and attention, small growers can achieve yields in the 75 t/ha range. Medium-sized farms only achieve 70 t/ha on average, but drip ferti-

irrigation and the use of new varieties can enable them to reach 120 t/ha in some cases.

The farm-price of fresh tomatoes is no longer fixed in Brussels, and is now the result of free negotiations between processors and growers' organizations. The production threshold for the processing subsidy directly paid to the growers is 1 050 000 tonnes of fresh tomatoes, more than 95 % of which is for tomato paste production. Each year circa 100 000 tonnes of tomatoes are produced in Portugal under contract with neighbouring Spanish processors.

In 2005, the volume processed in Portugal reached 1 million MT., down 15 % from 2004, which was an outstanding season regarding average yield (84 MT/ / hectare). The price of fresh tomatoes varied between 43 and 45 Euros per MT. ex-field. There are about ten tomato processing firms in Portugal. These are large firms compared to the European average. In the last few years, the production of triturated tomatoes has been developing, also for export. More and more tomato powder is also produced from tomato paste by spray-drying, outside the harvesting season. Some firms also produce tomato pizza sauces, natural or flavoured with various spices. Ketchup production is increasing significantly.

ANNEE	Production de tomates transformées (1000 tonnes)	Evolution du volume transformé (index 100 en 78)	Evolution du volume transformé (en % AMITON)	Evolution du prix des tomates fraîches (US $/100kg bord champ)
1978/79	612	100%	11,00%	2,62
1979/80	553	90%	8,00%	2,50
1980/81	454	74%	6,80%	2,63
1981/82	387	63%	5,90%	4,24
1982/83	487	80%	7,30%	4,82
1983/84	558	91%	6,80%	4,2
1984/85	731	119%	6,90%	4,28
1985/86	742	121%	8,50%	4,69
1986/87	542	89%	9,00%	5,72
1987/88	421	69%	6,70%	7,01
1988/89	456	75%	6,50%	7,65
1989/90	617	101%	6,80%	7,62
1990/91	823	134%	9,30%	10,27
1991/92	706	115%	8,60%	10,14
1992/93	447	73%	6,10%	12,25
1993/94	501	82%	6,60%	9,36
1994/95	865	141%	9,70%	10,04
1995/96	831	136%	8,80%	12,84
1996/97	905	148%	8,60%	12,4
1997/98	722	118%	8,50%	10,4
1998/99	988	161%	9,00%	10,23
99/2000	999	163%	8,10%	9,16
2000/01	855	139%	7,75%	8,40
2001/02	917	150%	8,90%	7,20
2002/03	840	137%	10,76%	4.2
2003/04	865	141%	9,90%	4.0
2004/05	1180	193%	10,32%	5.3
2005/06	1000	163%	9,50%	5,50
YEAR	Processing tomato production (1000 tonnes)	Evolution of the processed volume (index 100 in 1978)	Evolution of the processed volume (in % Amiton)	Evolution of price of fresh tomatoes(US $/100 kg)