

WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 18 July 2018

AMITOM members in the EU

In **Greece**, the weather conditions have been bad in June and early July with many rain storms, some flooding and diseases which had led to a reduction of the forecast by 15% to 360,000 tonnes. Factories started last week in the south and should start next week in the other regions.

In **Hungary**, the forecast is maintained at 120,000 tonnes despite the weather been far from ideal.

In the **Italy**, the total estimate is reduced from 4.9 million tonnes to 4.75 million tonnes. The situation is normal in the **North** and the harvest is now starting. The surface planted is 35,000 hectares and the current forecast is 2.45 million tonnes, 10% less than in 2017.

In the **Centre and South**, the official surfaces were released yesterday and are 2,000 hectares lower than last year. The late planting, due to the early worry about a possible drought will push a lot of the crop into September and the first one or two weeks in October and this will also reduce yields so the forecast is down to 2.3 million tonnes. Some factories have now started processing cherry tomatoes and specialties, the main harvest will start next week for round and at the end of July for the long types.

OI Pomodoro da Industria del Nord Italia press release giving the surfaces contracted in 2018 is appended.

In **Portugal**, the summer is late with temperatures not exceeding 26 to 30 °C and the plants are looking good but developing more slowly. The harvest should only start on 10 August and it is expected that only 30% of the harvest will be achieved by the end of August (normally 50-55%). The forecast remains 1.25 million tonnes but the total volume will depend largely on the weather in September and the first week of October.

In **Spain**, there is also an important delay in all the regions due to the cool weather in June and July: in Andalucía, the harvest will start on 1st August (normally 10 July) and in Extremadura on 10 August (normally 20-25 July). Moreover, the dew and high humidity due to the low temperatures increases the need for treatments. The forecast is maintained at 2.6 million tonnes but a high proportion of the crop will be harvested in September which is more risky.

Other AMITOM members

In **Tunisia**, the harvest started during the last week in June and 250,000 tonnes had been processed by 16 July by 23 of the 26 factories. The tomatoes come from the Centre region (Kairouan, Sidi bouzid and Gafsa) and the Cap Bon region. The forecast is now 570,000 tonnes.

In **Turkey**, the factories in the south started last week but the early quality is poor with lots of diseases. Moreover, there is strong competition at the moment from the fresh market as there is a gap in

production so spot prices are high. Quality and volumes should pick up soon and the forecast is maintained at 1.4 million tonnes.

In **Ukraine**, the weather was good in June and beginning of July and allowed tomatoes to develop in a favorable environment. A wide spread of noctuid is the most serious insect question this season so far. Forecast remains the same (750,000 tonnes) and the harvest should start in the beginning of August.

Other WPTC countries

In **California**, the estimate is to process 724,000 short tons (657,000 metric tonnes) or this week. At the end of this week (July 21) the industry will have processed approximately 989,200 tons (897,000 metric tonnes). Harvest started in the first week of July. So far field yields are good and quality is meeting projections. We are currently experiencing a prolonged period of above normal temperatures that the industry will be monitoring. All factories should be up and running by Monday, July 23rd.

The latest CLFP report on volume processed during the last week is appended.

In **Canada**, the crops are reportedly looking excellent but season has been very hot and dry. We hope for timely rains where crops are not irrigated.

In **China**, As expected, the total tomatoes of China will be around 3.7 million tonnes. Current weather conditions are normal, and there is no serious diseases. Tomato plants grow well. The start time of new season will be similar to last year around early of August.

In **Japan**, the crop update for 2018 remains 32,000 tonnes from 450 hectares.

In **South Africa**, harvest is continuing in the northern production area. The impact of white fly and side selling continue. The current projection is 140,000 tonnes. The winter rainfall area is receiving good rain and the Clan William dam is currently on 98% compare to 22% last year. Planting in the South will commence during October.

Other countries

The **US Midwest** will be starting in the second week of August and crop prospects remain good. Some areas are experiencing some excessive dry conditions but overall the crop should meet expectations.

In **Poland**, there was good weather in May, very hot and dry June and first week of July. Drought losses in north part of Poland, much better situation in south regions. The forecast is 180,000 tonnes from 2 800 hectares, with a start of the harvest on 1st August.



WPTC World production estimate of tomatoes for processing
(in 1000 metric tonnes)

Date of last update: 18/07/2018

| | | 2015 | 2016 | 2017 | 2018 | AVERAGE | VARIATION | |
|--|---|-------------------------|---------------|---------------|---------------|---------------|--------------|-------------|
| | | FINAL | FINAL | FINAL | FORECAST | 2015-2017 | 2018 vs 2017 | |
| NORTHERN HEMISPHERE* | MEMBERS IN MEDITERRANEAN AREA (AMITOM) | Algeria** | 500 Mem. | 550 Mem. | 600 Misc. | 600 Est. | 550 | 0% |
| | | Egypt | 250 Est. | 350 Misc. | 300 Est. | 300 Est. | 300 | 0% |
| | | France | 170 Mem. | 183 Mem. | 195 Mem. | 170 Mem. | 183 | -13% |
| | | Greece | 500 Mem. | 440 Mem. | 400 Mem. | 360 Mem. | 447 | -10% |
| | | Iran** | 1 350 Mem. | 1 150 Mem. | 980 Mem. | 1 500 Mem. | 1 160 | 53% |
| | | Israel | 220 Mem. | 200 Mem. | 200 Mem. | 200 Mem. | 207 | 0% |
| | | Italy | 5 393 Mem. | 5 180 Mem. | 5 200 Mem. | 4 750 Mem. | 5 258 | -9% |
| | | Malta** | 8 Mem. | 8 Mem. | 8 Mem. | 8 Mem. | 8 | 0% |
| | | Portugal*** | 1 660 Mem. | 1 507 Mem. | 1 554 Mem. | 1 250 Mem. | 1 574 | -20% |
| | | Russia** | 90 Mem. | 145 Mem. | 400 Mem. | 500 Mem. | 212 | 25% |
| | | Spain*** | 3 028 Mem. | 2 950 Mem. | 3 350 Mem. | 2 600 Mem. | 3 109 | -22% |
| | | Syria** | 70 Mem. | 70 Est. | 70 Est. | 70 Est. | 70 | 0% |
| | | Tunisia | 935 Mem. | 650 Mem. | 643 Mem. | 570 Mem. | 743 | -11% |
| | | Turkey | 2 700 Mem. | 2 100 Mem. | 1 900 Mem. | 1 400 Mem. | 2 233 | -26% |
| | | Ukraine** | 550 Mem. | 550 Mem. | 650 Mem. | 750 Mem. | 583 | 15% |
| Subtotal AMITOM | | 17 424 | 16 033 | 16 450 | 15 028 | 16 636 | -9% | |
| of which members in EU | | 10 759 | 10 268 | 10 707 | 9 138 | 10 578 | -14,7% | |
| OTHER MEMBERS | Brazil | 1 300 Mem. | 1 450 Mem. | 1 450 Mem. | 1 407 Mem. | 1 400 | -3,0% | |
| | Canada | 386 Mem. | 456 Mem. | 426 Mem. | 424 Mem. | 423 | 0% | |
| | California | 13 025 Off. | 11 470 Mem. | 9 492 Mem. | 10 795 Mem. | 11 329 | 14% | |
| | China | 5 600 Mem. | 5 150 Mem. | 6 200 Mem. | 3 700 Mem. | 5 650 | -40% | |
| | Japan | 35 Mem. | 33 Mem. | 30 Mem. | 32 Mem. | 33 | 7% | |
| | Subtotal Other Members | 20 346 | 18 559 | 17 598 | 16 358 | 18 834 | -7,0% | |
| NON MEMBERS | Bulgaria | 60 Misc. | 40 Misc. | 50 Misc. | 50 Est. | 50 | 0% | |
| | Czech Republic | 25 Est. | 25 Est. | 25 Est. | 25 Est. | 25 | 0% | |
| | Hungary | 105 Est. | 105 Est. | 100 Misc. | 125 Misc. | 103 | 25% | |
| | Morocco | 130 Est. | 130 Est. | 130 Est. | 130 Est. | 130 | 0% | |
| | Poland | 210 Misc. | 220 Misc. | 200 Misc. | 180 Misc. | 210 | -10% | |
| | Slovakia | 20 Est. | 20 Est. | 20 Est. | 20 Est. | 20 | 0% | |
| | USA excluding California | 350 Misc. | 476 Misc. | 408 Misc. | 450 Misc. | 411 | 10% | |
| | Subtotal Non Members | 900 | 1 016 | 933 | 980 | 950 | 5,0% | |
| Total Northern Hemisphere | | 38 670 | 35 608 | 34 981 | 32 366 | 36 420 | -7,5% | |
| of which WPTC members | | 37 770 | 34 592 | 34 048 | 31 386 | 35 470 | -7,8% | |
| of which European Union | | 11 179 | 10 678 | 11 102 | 9 538 | 10 986 | -14,1% | |
| SOUTHERN HEMISPHERE* | MEMBERS | Argentina | 535 Mem. | 405 Mem. | 488 Mem. | 435 Mem. | 476 | -10,9% |
| | | Australia | 286 Mem. | 275 Mem. | 185 Mem. | 228 Mem. | 249 | 23,0% |
| | | Chile | 850 Mem. | 800 Mem. | 1 080 Mem. | 1 211 Mem. | 910 | 12,1% |
| | | Peru | 112 Mem. | 100 Mem. | 110 Mem. | 100 Mem. | 107 | -9,1% |
| | | South Africa | 140 Mem. | 145 Mem. | 180 Mem. | 140 Mem. | 155 | -22,2% |
| | | Subtotal members | 1 923 | 1 725 | 2 043 | 2 114 | 1 897 | 3,5% |
| | NON MEMBERS | Dominican Republic | 210 Misc. | 210 Est. | 220 Est. | 258 Misc. | 213 | 17,3% |
| | | India | 130 Est. | 130 Est. | 130 Est. | 130 Est. | 130 | 0,0% |
| | | Mexico | 40 Misc. | 40 Misc. | 40 Est. | 40 Est. | 40 | 0,0% |
| | | New Zealand | 51 Misc. | 51 Est. | 50 Misc. | 50 Est. | 51 | 0,0% |
| | | Senegal | 80 Misc. | 28 Misc. | 53 Misc. | 80 Misc. | 54 | 50,9% |
| | | Thailand | 260 Est. | 260 Est. | 260 Est. | 260 Est. | 260 | 0,0% |
| | | Venezuela | 20 Est. | 20 Est. | 20 Est. | 20 Est. | 20 | 0,0% |
| | Subtotal non members | 791 | 739 | 773 | 838 | 768 | 8,4% | |
| | Total Southern Hemisphere | | 2 714 | 2 464 | 2 816 | 2 952 | 2 665 | 4,8% |
| GENERAL TOTAL | | 41 384 | 38 072 | 37 797 | 35 318 | 39 084 | -6,6% | |
| of which members of the WPTC | | 39 693 | 36 317 | 36 091 | 33 500 | 37 367 | -7,2% | |
| WPTC as percentage of total production | | 96% | 95% | 95% | 95% | 96% | -0,7% | |

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

** AMITOM associate members

*** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:

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Calano le superfici di pomodoro da industria del Nord Italia
Si coltivano 35.099 ettari: -4,4% rispetto al 2017
e -5% sul contrattato di inizio campagna

Stabile la produzione bio che si attesta a 2.365 ettari, pari al 6,8% del totale

Calano le superfici coltivate a pomodoro da industria del Nord Italia. Sono 35.099 gli ettari coltivati per la campagna 2018 che vede iniziare la fase di trasformazione della materia prima negli stabilimenti proprio in questi giorni.

Il dato raccolto dall'OI Pomodoro da industria del Nord Italia mette in evidenza una contrazione del -4,4% rispetto alla campagna 2017 ed un calo del -5% rispetto a quanto contrattato ad inizio campagna.

Questi valori – sulla base della resa media di 69,08 tonnellate per ettaro dell'ultimo quinquennio (2013-2017) del territorio dell'OI - permettono di stimare una produzione di circa 2,4 milioni di tonnellate di pomodoro trasformato per la campagna 2018, in significativo calo rispetto allo scorso anno.

Si consolida la quota di pomodoro da industria biologico che riguarda 2.365 ettari (55 ettari in più dello scorso anno) e rappresenta il 6,8% del totale.

La ripartizione territoriale delle superfici

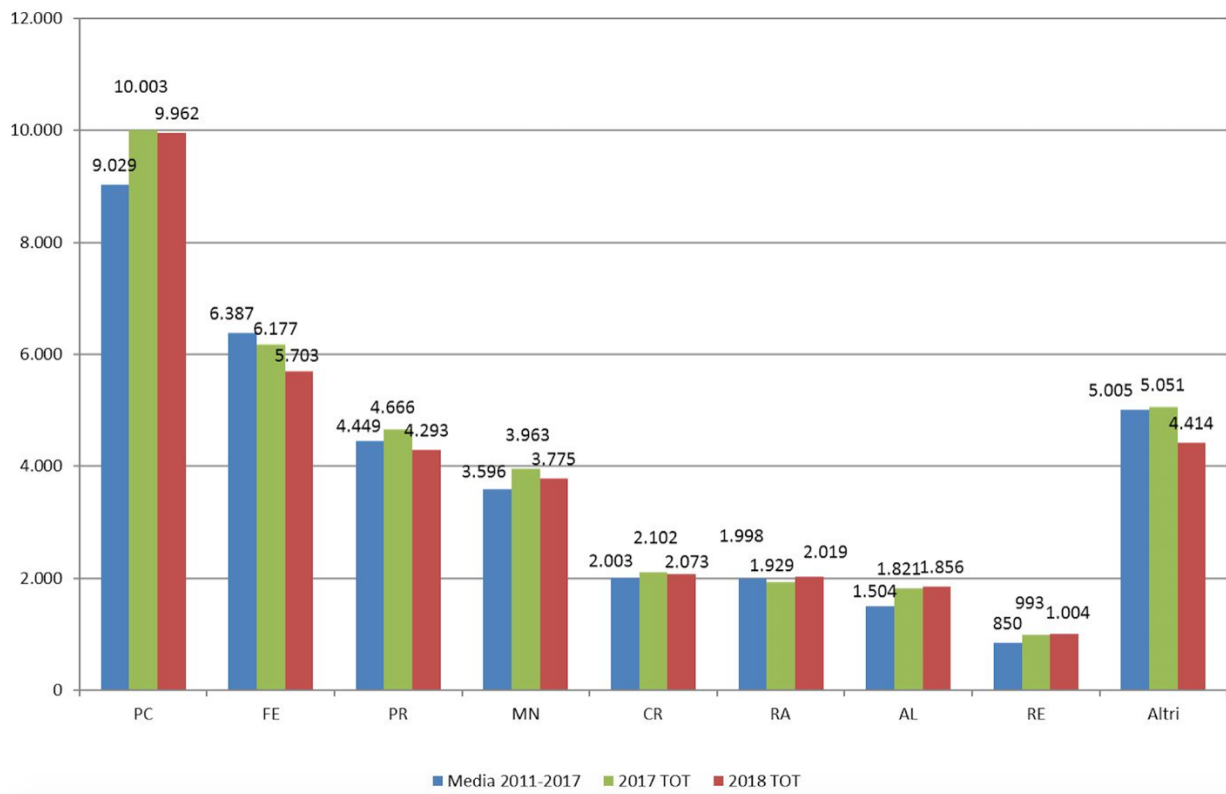
L'Emilia-Romagna si conferma la regione con la quota più consistente di superfici coltivate a pomodoro da industria pari a 24.140 ettari, seguita da Lombardia (7.307), Piemonte (2.049) e Veneto (1.406).

Questa la ripartizione nelle principali province contraddistinte dalla presenza della coltivazione del pomodoro da industria: Piacenza: 9.962 ettari; Ferrara: 5.703; Parma: 4.293; Mantova: 3.775; Cremona: 2.073; Ravenna 2.019; Alessandria: 1.856; Reggio Emilia: 1004; Modena: 763, Verona 727 e Rovigo 564. Seguono altre province con valori più contenuti.

Rabboni: “In linea alle esigenze del mercato”

“Si confermano – commenta il presidente dell'OI Pomodoro da industria Tiberio Rabboni - le aspettative di una diminuzione della produzione di pomodoro da industria in linea con quelle che sono le attuali esigenze di mercato. L'obiettivo della filiera del Nord Italia resta quello di un'adeguata valorizzazione di una produzione sostenibile e di qualità. Per farlo useremo al meglio gli strumenti a nostra disposizione quali l'introduzione dell'obbligo di origine in etichetta e valuteremo le opportunità offerte dal programma Made Green in Italy promosso dal ministero dell'Ambiente con il quale si incentivano modelli sostenibili di produzione e, in particolare, la riduzione degli impatti ambientali che questi generano durante il loro ciclo di vita”.

Grafici con la ripartizione delle superfici per provincia:





CALIFORNIA TOMATO TONNAGE

Week ending July 7, 2018
Report released July 16, 2018

To Members:

Following are the certified and paid for tonnage figures by county as shown by certificates for week ending July 7, 2018.

| COUNTIES | -----2018 TOMATO SEASON----- | | | |
|-------------------------|---|---------------------------------|-----------------------------------|------------------------------------|
| | 2017 Accumulative Total to July 8 | Previous Total to June 30 | Receipts Week Ending July 7 | Accumulative Total to July 7 |
| Colusa | 0 | 0 | 0 | 0 |
| Contra Costa | 0 | 0 | 0 | 0 |
| Fresno | 10,155 | 0 | 1,776 | 1,776 |
| Glenn | 0 | 0 | 0 | 0 |
| Kern | 10,497 | 0 | 5,854 | 5,854 |
| Kings | 8,058 | 0 | 1,086 | 1,086 |
| Madera | 0 | 0 | 0 | 0 |
| Merced | 0 | 0 | 0 | 0 |
| Sacramento | 0 | 0 | 0 | 0 |
| San Benito | 0 | 0 | 0 | 0 |
| San Joaquin | 0 | 0 | 0 | 0 |
| Solano | 0 | 0 | 0 | 0 |
| Stanislaus | 0 | 0 | 0 | 0 |
| Sutter | 0 | 0 | 0 | 0 |
| Tulare | 0 | 0 | 0 | 0 |
| Yolo | 0 | 0 | 0 | 0 |
| Statewide Totals | 28,710 | 0 | 8,716 | 8,716 |

Weekly tonnage for week ending July 8, 2017 was 28,710.

Projected weekly tonnage for week ending July 14, 2018 are 256,000.

Information provided by the California Processing Tomato Advisory Board.

Five Year Average | California Tomato Tonnage

