

WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 17 August 2018

AMITOM members in the EU

In **France**, the surface finally planted was finally close to 2,050 hectares, lower than the 2,120 hectares expected in the spring, so the total production should be reduced to between 150,000 to 165,000 tonnes depending on yield (75 to 80 t/ha average). About 30,000 tonnes had been processed at the end of last week (11 August), under 20% of the revised forecast. All factories are now working in the south-east and the south-west. There was a lot of rain between 9 and 13 August which disrupted the harvest slightly, but which could affect the quality of already ripe tomatoes in the fields.

In **Greece**, the weather so far in August has been quite good but the rains in June and July have finally caused more damages than initially expected, especially in Peloponnese (-30%) so the forecast is now reduced to 320,000 tonnes from the 4,200 hectares planted. To date, about 190,000 tonnes (60% of the forecast) has been processed and a peak is expected in the next two weeks. It is the earliest crop ever and the season should be only 50 days when normally it lasts between 60 and 70 days. Farm yields are low. Brix was also low (4.65) until now, but it has been increasing in the last few days (c. 4.8). The weather remains strange, with scattered rains.

In **Hungary**, the harvest started early on 6 August, when it normally starts around 10-15 August, and should finish at the end of September. To date, 29,000 tonnes have already been processed, 24% of the 120,000 tonnes forecast from 1,350 hectares planted. The weather has been quite good to date with no serious rains for the last two to three weeks. The peak will be reached next week.

In the **North of Italy**, it is estimated that as of 15 August about 900,000 tonnes had already been delivered, 33-35% of the total forecast which remains 2.45 million tonnes. Brix remains high at 4.94° on average but farm yields are 5 to 10% lower than contracted. The surface planted was 35,100 hectares (-5% from the 37,000 ha in 2017) and 37% of it has been harvested to date. The crop is early in the east (Ferrara, Veneto) and should finish by 10 September, but it is slightly late in the west. Some rains and hails have disrupted the harvest in the last few days especially in the Piacenza area and some factories have slowed down or closed on 15 August ("Ferragosto" holiday) but all should be back at full capacity by the end of the week.

In the **Centre and South of Italy**, 26,000 hectares were planted this year (8% less than in 2017). As of 14 August, about 25% of the expected volume had been processed. The harvest is about a week late, but factories are now at full capacity. Rains in the last couple of days have also slowed down the harvest and some factories closed for "Ferragosto", when wash up of equipment is often also scheduled. Most factories are restarting today or tomorrow. Fruit quality and brix are quite good but farm yields are lower than expected. The expectations stay the same so the total forecast for Italy remains at 4.75 million tonnes but depending on a good yield in September.

In **Portugal**, the extreme heatwave at the end of last week when temperatures suddenly went from 26°C to up to 45°C have caused damages to the tomatoes especially as humid conditions favoured disease development. The temperatures are now back to normal. It will take some time to evaluate

the situation fully, but the forecast is now reduced from 1.25 million tonnes to 1.1 million tonnes (- 10 to 15%) from the 14,000 hectares planted. The first factory only opened on 8 August, the second on 10 August and most of the others are only opening today, when normally the harvest starts at the end of July. Less than 1% of the crop had been processed by 10 August and it is expected that only 25% will be by the end of August, so a very good September will be needed to achieve the revised forecast.

In **Spain**, the total forecast remains 2.6 million tonnes from the 30,500 hectares planted.

In Andalusia, the harvest started at the end of July and factories are now running at full capacity. The recent heatwave has had no reported detrimental effect, but it is speeding fruit maturation and now putting a lot of pressure on the factories to absorb all the tomatoes. The brix is higher than last year and yields good.

In Extremadura, the first factories only opened on 7-10 August and have not yet reached full capacity with less than 10% of the expected volume processed to date. There will be a big concentration in ripening next week when the peak will be reached but no other effects of the heatwaves have been reported. Early yields are not good, but brix is higher than last year.

In the north, the harvest is just starting this week and full capacity will only be reached at the end of the month or early in September.

Other AMITOM members

In **Tunisia**, 510,000 tonnes have already been processed as of 15 August and only 10 of the 26 factories remained open. It is estimated that 90% of the crop has already been harvested and the factories now source tomatoes from the Jendouba (North-west) region.

In **Turkey**, the situation remains difficult with a low production, poor quality and a high price of tomatoes on the open market. Final production will probably be lower than 1.3 million tonnes.

In **Ukraine**, the weather in the first half of August was ok with no rains, cool nights and relatively warm days. The quality of the early tomatoes was ok. The only concern was Brix which was well below 5 and estimated at 4.5°. All factories are working now. About 160,000 metric tonnes of fresh tomatoes have been processed to date which is a bit more than 20% of the program. The forecast maintained at a level of 750,000 tonnes.

Other WPTC countries

In **California**, the estimate is to process 1,131,745 short tons (1,026,026 metric tonnes) for this week. At the end of this week (18 August) the industry will have processed approximately 5,264,960 short tons (4,775,420 metric tonnes). Overall field yields are doing very well to this point in the season. Solids continue to run below historical averages statewide. The overall quality of the crop continues to be good.

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

In **China**, almost all the factories have now started processing and the weather conditions are good.

In **Japan** & **South Africa**, no changes are reported.

Other countries

The **US Midwest** has gotten off to a good start with the season. Fruit quality has been good and only a few rain interruptions have occurred. The crop size is as expected, and a good season is ahead of us at this time.

In **Senegal**, the 2018 crop is now over with only 52,895 tonnes processed from an earlier estimate of 80,000 tonnes. In 2017, 52,601 tonnes had been processed and 28,000 tonnes in 2016. The volume can be broken down as follows : Agroline (17,380 tonnes), Socas (21,246 tonnes) and Takamoul Food (14,089 tonnes).



CALIFORNIA TOMATO TONNAGE

Week ending August 11, 2018

Report released August 14, 2018

To Members:

Following are the certified and paid for tonnage figures by county as shown by certificates for week ending August 11, 2018.

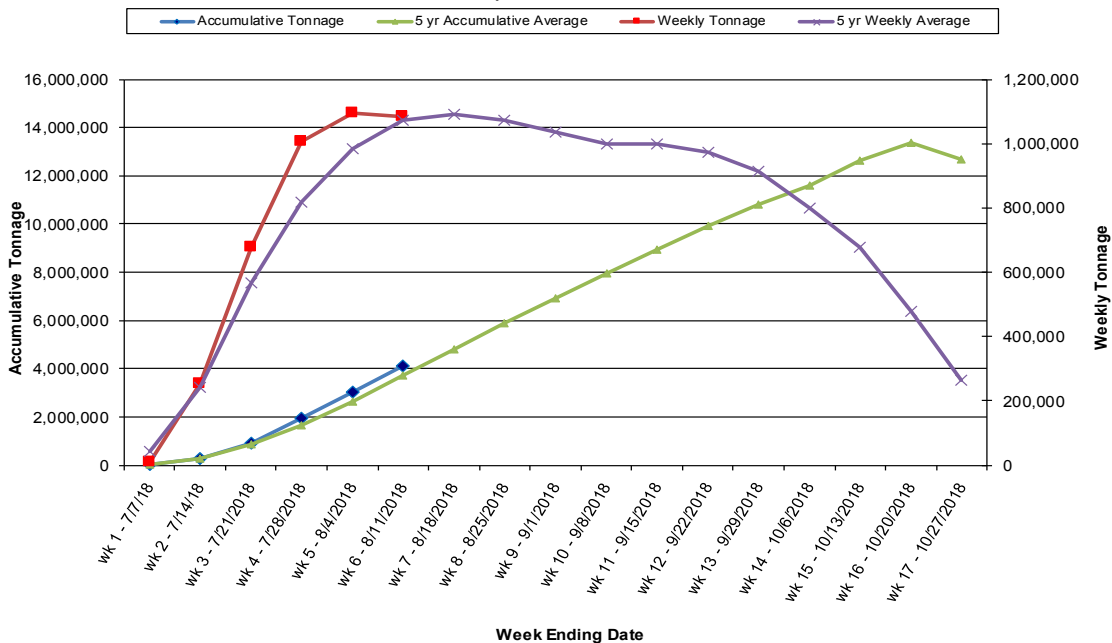
<u>COUNTIES</u>	-----2018 TOMATO SEASON-----			
	2017 Accumulative Total to August 12	Previous Total to August 4	Receipts Wk Ending August 11	Accumulative Total to August 11
Colusa	201,128	207,858	101,711	309,569
Contra Costa	90,502	41,097	25,665	66,762
Fresno	2,006,174	1,574,950	575,928	2,150,880
Glenn	0	0	3,236	3,236
Kern	326,209	306,718	34,922	341,641
Kings	809,648	663,404	121,779	785,183
Madera	44,766	1,633	6,824	8,457
Merced	92,868	12,437	11,140	23,577
Sacramento	0	0	1,059	1,059
San Benito	0	812	4,205	5,018
San Joaquin	0	1,909	3,816	5,725
Solano	35,557	21,954	27,688	49,643
Stanislaus	8,986	9,198	9,182	18,379
Sutter	15,550	26,236	33,964	60,200
Tulare	0	0	0	0
Yolo	272,636	172,171	124,485	296,655
Statewide Totals	3,904,024	3,040,377	1,085,604	4,125,984

Weekly tonnage for week ending August 12, 2017 was 1,033,263.

Projected weekly tonnage for week ending August 18, 2018 is 1,131,745.

Information provided by the California Processing Tomato Advisory Board.

Five Year Average | California Tomato Tonnage





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

Date of last update: 17/08/2018

		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 Est.	300 Misc.	300 Est.	300	0%
	France	170 Mem.	183 Mem.	195 Mem.	160 Mem.	183	-18%
	Greece	500 Mem.	440 Mem.	400 Mem.	320 Mem.	447	-20%
	Hungary**	105 Est.	105 Est.	100 Misc.	120 Mem.	103	20%
	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.	1 100 Mem.	1 574	-29%
	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.	1 300 Mem.	2 233	-32%	
Ukraine**	550 Mem.	550 Mem.	650 Mem.	750 Mem.	583	15%	
	Subtotal AMITOM	17 529	16 138	16 550	14 848	16 739	-10%
	of which members in EU	10 759	10 373	10 707	9 058	10 613	-15,4%
	OTHER MEMBERS						
	Brazil	1 300 Mem.	1 450 Mem.	1 450 Mem.	1 320 Mem.	1 400	-9,0%
	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	16 271	18 834	-7,5%
	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%
	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	795	911	833	855	846	2,6%
	Total Northern Hemisphere	38 670	35 608	34 981	31 974	36 420	-8,6%
	of which WPTC members	37 875	34 697	34 148	31 119	35 573	-8,9%
	of which European Union	11 074	10 678	11 002	9 333	10 918	-15,2%
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.	53 Misc.	54	0,0%
	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	811	768	4,9%	
	Total Southern Hemisphere	2 714	2 464	2 816	2 925	2 665	3,9%
GENERAL TOTAL	41 384	38 072	37 797	34 899	39 084	-7,7%	
of which members of the WPTC	39 798	36 422	36 191	33 233	37 470	-8,2%	
WPTC as percentage of total production	96%	96%	96%	95%	96%	-0,5%	

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:

WPTC does not guarantee or assume any liability for the accuracy of the contents of this report and shall not be responsible for any losses sustained as a result of relying on the contained information.