WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 29 March 2019

AMITOM members in the EU

In **France**, the board of SONITO met this week and established that the surface planted will be quite similar to last year at 2,074 hectares instead of 2,190, of which 342 hectares organic (16%). The forecast is around 155,000 to 160,000 tonnes. Planting just started this week in the South East but it is too cold to start in other areas. Planting will start mid-April in the South West. Soils are very dry but there are water reserves and no issue are foreseen with water availability as the soil was wet in the South East. It could be different in the South West because of less rainfall in autumn. The prices have not been set yet but should remain similar to last year.

In **Greece**, the winter was very wet with a lot of rain and snow, and more snow expected in the mountain so there is more water than needed and no issue for tomatoes. The forecast remains 400,000 tonnes and the price should be similar than last year (85 €/t delivered) or with a small increase. Planting will start next week in the south.

In **Hungary**, the majority of farmers growing for the largest processor (Univer) decreased the volume contracted because of unsuccessful negotiations. In consequence, the new forecast is 100,000 tonnes (Univer) + 20,000 tonnes (other processor) so a total of 120,000 tonnes instead of the initial 140,000 tonnes.

In the **North of Italy**, there is a serious drought alarm as the winter and spring have been very dry with rainfall 40% lower than average. The price negotiations are ongoing with the last proposal from processors of 86 + 1 €/t ex field not accepted by growers. The POs have made an agreement to keep the total planted area below 35,800 hectares with internal sanctioning system. The forecast remains stable at 2.5 million tonnes.
In the **Centre & South of Italy**, the last month saw little rains and the soils are dry but there are good water reserves so no concerns with water availability. Planting will start next week. Operators are waiting for the price to be set in the north before finalising pricing. The forecast remains 2.4 million tonnes.
The total for **Italy** therefore remains 4.9 million tonnes.

In **Portugal**, the winter was very dry with not enough water/rain, but no issue is reported so far. The spring is very warm. A few growers will start planting end of this week but most of them will be next week. The official forecast is 1,263,195 tonnes for a surface of 14,375 hectares. Price differ between the factories but should remain similar to last year at between 70 to 80 €/t ex field.

In **Spain**, it is expected that 50% of the surfaces will have been planted by the end of the week in Andalucía where it started in early March and planting will start later this week in Extremadura. The winter was very dry and warm, but no issue of water availability is expected. Prices should remain similar to last year at about 70 €/t ex field or 75-77 €/t delivered. The forecast is increased to c. 3 million tonnes.

Other AMITOM members

In **Algeria**, there was an abundance of rain during the winter and the reservoirs are full so there is no worry about water availability. The high import taxes which were recently announced will stop imports and farmers are keen to grow tomatoes. Production should therefore exceed 600,000 or even 700,000 tonnes.

The draft **Russia** forecast, that has been collected at the moment is 550.000 tonnes to be processed in 2019 season. No new players, but there are plans to increase the production from the existing factories in Astrakhan, KBR, Volgograd.

In **Tunisia**, planned area for the seasonal tomato crop is 17,500 hectares, with an estimated average yield ≈ 66 t/ha. The total production estimate is 1,160,000 tonnes of which 850,000 tonnes intended for the production of tomato concentrate (≈ 130,000 tonnes of 28/30 paste) and 30,000 tonnes for the production of canned tomatoes (≈ 22,000 tonnes of canned). The base price for tomatoes is 170 TND/t ≈ 50 €/t. Transplanting of tomato plants began on February 20, 2019 in the central regions (Gafsa, Kairouan, Sidi Bouzid) and Cape Bon and the areas planted until 18 March 2019 reached 3,500 hectares. The rainfall of the months of January and February has restored the deficit in water resources (groundwater, dams ...) cumulated for 3 years. Current weather conditions are favorable for transplanting tomato plants. The actual start of the harvest is scheduled for the last week of June 2019.

In **Turkey**, the surfaces planted should increase by 20% in the south compared with 2018 as farmers are quite keen to plants, whereas in the north farmers are more reluctant to plant. Contract price offered are varied but average about 500 TRL/t ex field. The winter has been cold but there is no issue so far. The forecast remains 1.9 million tonnes.

In **Ukraine**, the winter was not very cold. Now temperatures are cool at night but warm during the day. Seeding has started in the greenhouses. Negotiations with the farmers are beginning and prices should be set by mid-April. The forecast remains 850,000 tonnes.

Other WPTC members

In **Australia**, the volume expected is now around 221,000 tonnes.

In **Argentina**, Fair weather conditions, percentage of tonnage already harvested is 80% in this season, forecast is still 400,000 metric tonnes. Field gate price is around 74 USD per tonne with freight averaging 7.5 USD per tonne.

In **Brazil**, tomato season started late February and has good development. Our season will be reduced in 13 % in surface area with a total 14,140 hectares. We estimate 1.2 million tonnes processed this year. Some paste processors are having problems to sell tomato paste on the internal market and last year the yield was higher than most processors expected. Tomato price is around 78 USD per metric tonne and most of the area is already contracted

In **California**, on February 8th, NASS released its first estimate for the 2019 crop at 12.1 million short tons (10.97 metric tonnes) on 235,000 acres (95,100 hectares). Plantings are under way in the Southern growing areas and close to schedule. Continued rain has delayed plantings in the Northern growing area at this time.

In **Canada**, it is still a bit early to have a good estimate. Volumes are expected to be similar to last year or possibly very slightly less, but no contracts have yet been issued. Planting won't start for probably another 6 weeks or so, so it is still a little early to predict conditions, but the first signs of Spring arrived this week.

In **Chile**, the weather still dry and warm, with good yields and quality. As of today approximately 70% has already been harvested and the season will finish at the end of April.

In **China** the forecast remains 4.5 million tonnes. Conditions to date are normal.

In **Japan**, the 2019 crop estimate is 30,000 tonnes from an estimated surface planted of 430 ha.

In **Peru**, the 2018/19 harvest finished in February with 100,000 tonnes processed. The same volume is planned for next season

In **South Africa**, the expected total tonnes for this season is approximately 161 000 tonnes. The summer production part of 40 000 tonnes is on schedule till end April. The winter production season is due for 121 000 tonnes and the yields are according to forecast and the season ends mid-September.

Other countries

In the **USA Midwest**, production should be around 422,000 metric tonnes (465,000 short tons) with prices up a couple dollars (prices vary depending on destination and quality but are on average about 120 USD per short ton).

WPTC World production estimate of tomatoes for processing

(in 1000 metric tonnes)

Date of last update: 29/03/2019

Hemisphere	Group	Country	2016 FINAL		2017 FINAL		2018 FINAL		2019 FORECAST		AVERAGE 2016-2018	VARIATION 2019 vs 2018
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Algeria**	550	Mem.	600	Misc.	500	Est.	650	Mem.	550	30%
		Egypt	350	Misc.	300	Est.	400	Mem.	400	Est.	350	0%
		France	183	Mem.	195	Mem.	139	Mem.	155	Mem.	172	12%
		Greece	440	Mem.	400	Mem.	320	Mem.	400	Mem.	387	25%
		Hungary**	105	Est.	100	Misc.	106	Mem.	120	Mem.	104	13%
		Iran**	1 150	Mem.	980	Mem.	750	Mem.	1 500	Mem.	960	100%
		Israel	200	Mem.	200	Mem.	200	Mem.	200	Mem.	200	0%
		Italy	5 180	Mem.	5 200	Mem.	4 650	Mem.	4 900	Mem.	5 010	5%
		Malta**	8	Mem.	8	Mem.	7	Mem.	8	Est.	8	14%
		Portugal***	1 507	Mem.	1 554	Mem.	1 198	Mem.	1 263	Mem.	1 420	5%
		Russia**	145	Mem.	400	Mem.	495	Mem.	550	Mem.	347	11%
		Spain***	2 950	Mem.	3 350	Mem.	2 800	Mem.	3 000	Mem.	3 033	7%
		Syria**	70	Est.	70	Est.	70	Est.	70	Est.	70	0%
		Tunisia	650	Mem.	643	Mem.	618	Mem.	880	Mem.	637	42%
		Turkey	2 100	Mem.	1 900	Mem.	1 300	Mem.	1 900	Mem.	1 767	46%
		Ukraine**	550	Mem.	650	Mem.	735	Mem.	850	Mem.	645	16%
		Subtotal AMITOM	**16 138**		**16 550**		**14 288**		**16 846**		**15 659**	**18%**
		of which members in EU	**10 373**		**10 807**		**9 220**		**9 846**		**10 133**	**6,8%**
	OTHER MEMBERS	Brazil	1 450	Mem.	1 450	Mem.	1 400	Mem.	1 200	Mem.	1 433	-14,3%
		Canada	456	Mem.	426	Mem.	450	Mem.	450	Mem.	444	0%
		California	11 470	Mem.	9 492	Mem.	11 137	Mem.	10 977	Mem.	10 700	-1%
		China	5 150	Mem.	6 200	Mem.	3 800	Mem.	4 500	Mem.	5 050	18%
		Japan	33	Mem.	30	Mem.	28	Mem.	30	Mem.	30	7%
		Subtotal Other Members	**18 559**		**17 598**		**16 815**		**17 157**		**17 657**	**2,0%**
	NON MEMBERS	Bulgaria	40	Misc.	50	Misc.	30	Misc.	50	Misc.	40	67%
		Czech Republic	25	Est.	25	Est.	25	Est.	25	Est.	25	0%
		Morocco	130	Est.	130	Est.	130	Est.	130	Est.	130	0%
		Poland	220	Misc.	200	Misc.	200	Misc.	200	Est.	207	0%
		Slovakia	20	Est.	20	Est.	20	Est.	20	Est.	20	0%
		USA excluding California	476	Misc.	408	Misc.	410	Misc.	422	Misc.	431	3%
		Subtotal Non Members	**911**		**833**		**815**		**847**		**853**	**3,9%**
		Total Northen Hemisphere	**35 608**		**34 981**		**31 918**		**34 850**		**34 169**	**9,2%**
		of which WPTC members	**34 697**		**34 148**		**31 103**		**34 003**		**33 316**	**9,3%**
		of which European Union	**10 678**		**11 102**		**9 495**		**10 141**		**10 425**	**6,8%**
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	405	Mem.	488	Mem.	427	Mem.	400	Mem.	440	-6,3%
		Australia	275	Mem.	185	Mem.	228	Mem.	221	Mem.	229	-2,9%
		Chile	800	Mem.	1 080	Mem.	1 211	Mem.	1 143	Mem.	1 030	-5,6%
		Peru	100	Mem.	110	Mem.	100	Mem.	100	Mem.	103	0,0%
		South Africa	145	Mem.	180	Mem.	135	Mem.	161	Mem.	153	19,3%
		Subtotal members	**1 725**		**2 043**		**2 101**		**2 025**		**1 956**	**-3,6%**
	NON MEMBERS	Dominican Republic	210	Est.	220	Est.	258	Misc.	258	Est.	229	0,0%
		India	130	Est.	130	Est.	130	Est.	130	Est.	130	0,0%
		Mexico	40	Misc.	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	51	Est.	50	Misc.	50	Est.	50	Est.	50	0,0%
		Senegal	28	Misc.	53	Misc.	53	Misc.	53	Est.	45	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	**739**		**773**		**811**		**811**		**774**	**0,0%**
		Total Southen Hemisphere	**2 464**		**2 816**		**2 912**		**2 836**		**2 731**	**-2,6%**
GENERAL TOTAL			**38 072**		**37 797**		**34 830**		**37 686**		**36 900**	**8,2%**
of which members of the WPTC			36 422		36 191		33 204		36 028		35 272	8,5%
WPTC as percentage of total production			96%		96%		95%		96%		96%	0,3%

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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