WPTC CROP UPDATE AS OF 28 MARCH 2025

AMITOM COUNTRIES

BULGARIA

Seedlings are currently in the greenhouses and planting should start around 15 April. The field preparations have been done with no issues. The forecast remains the same at 40,000 tonnes but it may increase if rumours that a new farming operation could produce an additional 10,000 tonnes are confirmed.

FRANCE

The forecast has been updated to 173,000 tonnes of which 20,000 tonnes of organic, from a total surface of 2330 hectares (340 hectares for organics, less than last year). Planting has not started due to the heavy rains in the south-east mainly and should start next week (early April) if the fields dry enough (Mistral wind is expected so it should be good). The prices this year will range between 110 and 133 euros per tonne for conventional production and 190 to 200 euros per tonne for organic.

GREECE

The winter has been relatively dry but there has been enough rain so that water should not be an issue this season. Temperatures are still colder than usual. Planting was due to start this week, but it has been postponed to next week as fields were wet. The season should be shorter than usual as farmers are not keen to plant for a late crop.
The forecast remains 450,000 tonnes.

HUNGARY

The total forecast is 80,000 tonnes (Univer 50,000 tonnes, Aranyfácán 25,000 tonnes, others 5,000 tonnes).

IRAN

Planting is now starting in the south of the country, but the weather is variable due to some rains. Yields there are now 50 to 55 tonnes per hectares, up from 40 t/ha average a few years ago. Export of fresh tomatoes to neighbouring countries are up so it is difficult to forecast how much is going to be processed . it is however expected that the volume should be much higher than the 1.4 million tonnes of 2024, to about 2 million tonnes.

ITALY

In the north, there has been a lot of rain in winter and spring: in Emilia Romagna (the main region of cultivation for north Italy) the cumulative daily rainfall to date is 265 mm (vs an average of 150 mm). This has led to an accumulation of water in the fields making it difficult to prepare them. Consequently, plantings which were supposed to start this week will be postponed, hopefully to next ones, but with a 10 to 15 days delay. It is expected that the number of hectares planted will be higher than last year, but the number is not yet known as contracts have not all been signed yet. All companies are keen to replenish stocks, both for

bulk and for retail, following the large reduction in the crop size in 2024 (2.4 million tonnes instead of the 2.8 million tonnes expected) so the forecast is currently around 3 million tonnes expected.
In the South, on the contrary there is not enough water and the Occhito dam only contains abut 55 million cubic metres of water instead of 150 to 200 million on a normal year. Consequently, no water will be available from it for agriculture this summer. Farmers are trying to organise to get underground water. The surface planted in Puglia should therefore reduce by about 5 000 hectares, but this surface is in part compensated in other regions. Some OPs have agreed prices similar to those in the north, but most are waiting to see what surfaces are planted before contracts are signed with processors.

The overall forecast for Italy remains 5.6 million tonnes.

PORTUGAL

In Portugal, we have had a lot of rain, even close to a storm last week with very strong winds which we are not used to. Due to so much rain in the last month, the fields are flooded. In a "normal" year, planting should start week 13-14, but considering the current situation now it is impossible to prepare the fields with the land being so wet. Consequently, the transplanting will be delayed to week 15-16 if the fields do not dry until then.
Now, to make previsions is quite difficult. More rain is expected for next week, but we will have to follow to see if, and what, will be the impact in terms of schedule for transplant. If planting starts too late there is the possibility that not all the surfaces may be planted.
According to the official information already available, the surface for Portugal has been reduced by around 1 500 hectares. Therefore, the processing forecast remains at 1.4 million tonnes.

SPAIN

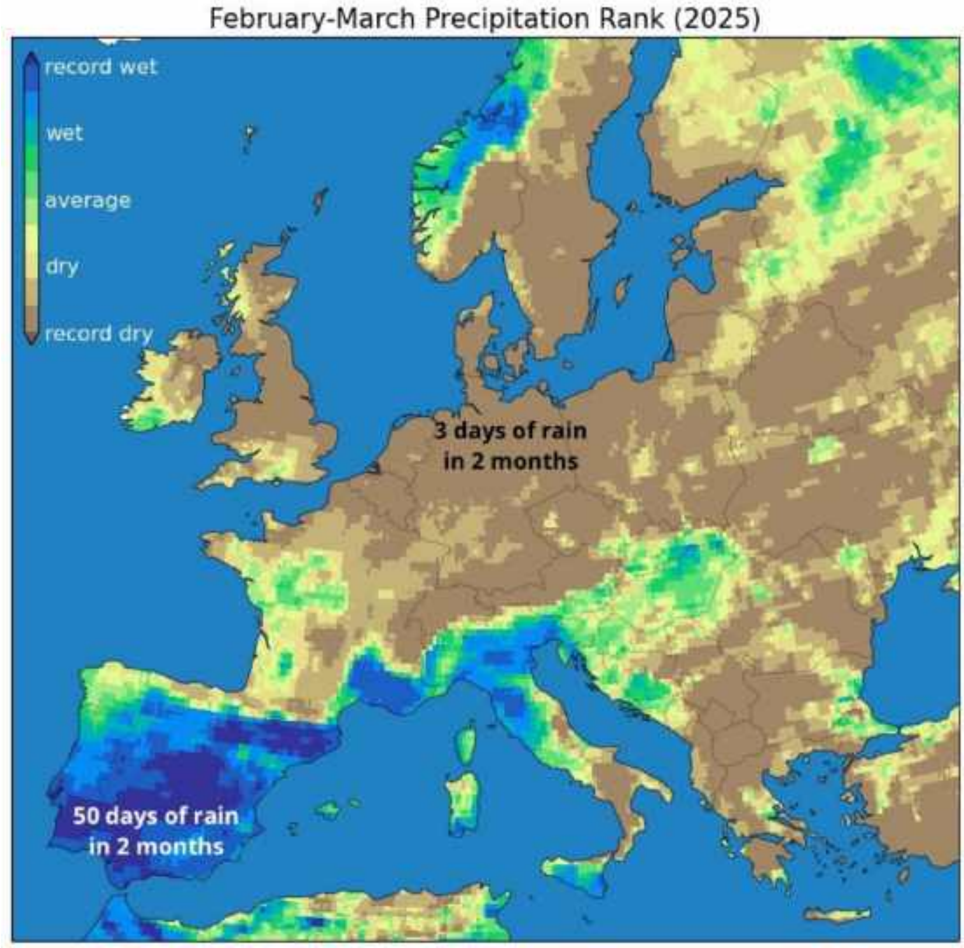
The wet weather in March makes it difficult for farmers to plant both in Andalusia and in Extremadura.
In Andalusia, planting should have started on 7 March, but it will only happen next week on sandy soils are fields were too wet so far. Seedlings have had to be cut due to the delay and some surfaces may not get planted.
In Extremadura, planting should have started this week, but they could not as the fields were wet. More rain is expected next week which may delay operations further, making planning difficult. In this region surfaces have been reduced this year.
The forecast is raised from 2.4 to 2.6 million tonnes due to a higher production expected in Andalusia compared with last year.

TURKEY

The contracting from the factories side has been going slower than expected. The farmers are reluctant to sign up as they do not like the price offered. The seed companies also report lower sales compared to previous years. The final number will be clear once the seedlings are in the ground as the non-contracted spot plantings are expected to be greater. For now, we will leave the forecast as before.

UKRAINE

Transplanting should start in the second part of April. Until all planting is finalised the forecast for 2025 remains 550,000 tonnes.



(Source: The World In Maps from MSWX data)

OTHER NORTHERN HEMISPHERE COUNTRIES

CALIFORNIA

The current estimate remains unchanged from the January NASS estimate of 10.2 million short tons (9.25 million metric tonnes) on 200,000 acres (81 000 hectares) for a reported yield of 51 tons per acre (114 metric tonnes per hectare). The 51 tons per acre should probably be considered a best case scenario as our historical yield is closer to 48 tons per acre (107 metric tonnes per hectare). The next estimate is to be released in late May, and we will report if there are any changes. Planting has been underway for almost a month and so far, conditions have been good with a few rainstorms that are very normal for this time of year. Initial water estimates have been announced and with the current snowpack and reservoir levels will provide enough water for the tomato crop. Negotiations continue for the 2025 price at this time.

CHINA

Due to farmers' low cultivation enthusiasm, the tomato planting area may fall short of expectations. However, it is still uncertain.

JAPAN

There is no change from the last report with a surface of 430 hectares for a total volume of tomatoes to be processed of 26,000 tonnes.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA
Harvest progress is about 70% done. The weather is fair and the forecast volume remains 585,000 tonnes.

AUSTRALIA
Forecast remains at 205,000 tonnes. Rainfall on the 20th of March resulted in a temporary delay in the harvest, affecting only certain regions. However, barring any further adverse weather conditions, the harvest is projected to be completed by approximately the 9th of April.

BRAZIL
Brazilian planting season is just starting with maybe 20% already planted. No changes from the last information.

CHILE
Harvest progress is estimated at 60%. The weather remains stable, with no rain and sunny, warm days. Because of this, we maintain our latest production estimate at 1,340,000 tonnes of raw material. This season, we estimate that tomatoes will be processed until the end of April or the first week of May.

SOUTH AFRICA
The summer crop deliveries are on schedule and the tomato volumes are slightly above normal in the Western Cape. The winter harvest is also on par with the transplanting schedule; thus South Africa still declares a predicted 160,000 tonnes for the 2025 season.

wptc World Processing Tomato Council

World production estimate of tomatoes for processing

Date of last update: 28/03/2025

Hemisphere	Group	Country	2023 FINAL		2024 FINAL		2025 FORECAST		AVERAGE 2022-2024	VARIATION 2025 vs 2024
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	37	Mem.	60	Mem.	40	Mem.	46	-33,3%
		Egypt	600	Mem.	624	Mem.	780	Mem.	560	25,0%
		France	160	Mem.	168	Mem.	173	Mem.	157	3,0%
		Greece	390	Mem.	510	Mem.	450	Mem.	413	-11,8%
		Hungary**	110	Mem.	120	Mem.	80	Mem.	103	-33,3%
		Iran**	2 000	Mem.	1 400	Mem.	2 000	Mem.	1 733	42,9%
		Israel	197	Mem.	184	Mem.	180	Mem.	177	-2,2%
		Italy	5 404	Mem.	5 272	Mem.	5 600	Mem.	5 384	6,2%
		Malta**	6	Mem.	7	Mem.	7	Est.	6	0,0%
		Portugal***	1 500	Mem.	1 500	Mem.	1 400	Mem.	1 471	-6,7%
		Spain***	2 600	Mem.	3 080	Mem.	2 600	Mem.	2 602	-15,6%
		Syria**	40	Est.	40	Est.	40	Est.	40	0,0%
		Tunisia	826	Mem.	999	Mem.	850	Est.	831	-14,9%
		Turkey	2 700	Mem.	2 700	Mem.	2 600	Mem.	2 583	-3,7%
		Ukraine**	500	Mem.	550	Mem.	550	Mem.	390	0,0%
		Subtotal AMITOM	**17 070**		**17 214**		**17 350**		**16 497**	**0,8%**
		of which members in EU	10 207		10 717		10 350		10 182	-3,4%
	OTHER MEMBERS	Brazil	1 571	Mem.	1 650	Mem.	1 600	Est.	1 618	-3,0%
		Canada	520	Mem.	493	Mem.	520	Mem.	520	5,5%
		California	11 556	Mem.	9 999	Mem.	9 250	Mem.	10 356	-7,5%
		China	8 000	Mem.	10 450	Mem.	6 000	Mem.	8 217	-42,6%
		Japan	26	Mem.	26	Mem.	26	Mem.	26	0,0%
		Subtotal Other Members	**21 673**		**22 618**		**17 396**		**20 737**	**-23,1%**
	NON MEMBERS	Algeria*	1 350	Misc	1 300	Misc.	1 300	Est.	1 283	0,0%
		Czech Republic	25	Est.	25	Est.	25	Est.	25	0,0%
		Morocco*	100	Est.	100	Est.	100	Est.	100	0,0%
		Poland	250	Misc	400	Misc.	400	Est.	275	0,0%
		Russia*	660	Misc	670	Misc.	650	Est.	656	-3,0%
		Slovakia	20	Est.	20	Est.	20	Est.	20	0,0%
		USA excluding California	475	Misc	475	Misc	475	Est.	467	0,0%
		Subtotal Non Members	**2 880**		**2 990**		**2 970**		**2 826**	**-0,7%**
		Total Northen Hemisphere	**41 623**		**42 822**		**37 716**		**40 060**	**-11,9%**
SOUTHERN HEMISPHERE	MEMBERS	Argentina	586	Mem.	630	Mem.	585	Mem.	614	-7,1%
		Australia	110	Mem.	211	Mem.	205	Mem.	183	-2,8%
		Chile	1 150	Mem.	1 300	Mem.	1 340	Mem.	1 140	3,1%
		Peru	150	Mem.	150	Mem.	160	Mem.	142	6,7%
		South Africa	160	Mem.	140	Mem.	160	Mem.	140	14,3%
		Subtotal members	**2 156**		**2 431**		**2 450**		**2 219**	**0,8%**
	NON MEMBERS	Dominican Republic	227	Est.	227	Est.	227	Est.	227	0,0%
		India	162	Est.	162	Est.	162	Est.	162	0,0%
		Mexico	40	Est.	40	Est.	40	Est.	40	0,0%
		New Zealand	25	Misc	39	Misc.	40	Misc.	39	2,6%
		Senegal	73	Est.	73	Est.	73	Est.	73	0,0%
		Thailand	40	Est.	40	Est.	40	Est.	40	0,0%
		Venezuela	24	Misc.	14	Misc.	14	Est.	19	0,0%
		Subtotal non members	**591**		**595**		**596**		**600**	**0,2%**
		Total Southen Hemisphere	**2 747**		**3 026**		**3 046**		**2 819**	**0,7%**
		GENERAL TOTAL	**44 370**		**45 848**		**40 762**		**42 879**	**-11,1%**
		of which members of the WPTC	40 899		42 263		37 196		39 453	-12,0%
		WPTC as percentage of total production	92%		92%		91%		92%	108,1%

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
* Previously an AMITOM member ** 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.

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