

WPTC CROP UPDATE AS OF 30 MAY 2025

AMITOM COUNTRIES

(Information collected during a videocall on Wednesday 28 May)

EGYPT

Transplanting operations finished this week and the harvest for the summer season will start around 15-20 June. Temperatures have been very high for the last couple of days. The forecast remains unchanged.

BULGARIA

A lot of heavy rain last week delayed transplanting this week, and it should now finish around 10 June. There are no problems so far in the fields despite temperatures remaining a bit lower than normal. The forecast is unchanged.

FRANCE

Planting should finish at the end of next week in the Southeast, which is quite normal, and around 10 June in the Southwest where it started very late but more or less caught up thanks to the good weather over the last two weeks. Development in the fields is good, and the weather forecast for next week is favourable. No change in the forecast.

GREECE

The crop is evolving well. Practically transplanting has finished and the adverse weather of last weekend did not cause any damage. We maintain our forecast of 450.000 tonnes.

HUNGARY

On May 10, frost was still affecting our plantations. The planting, including corrections, was completed around May 20. The month of May was unusually cold, as a result of which the seedlings were inhibited in their development. We are waiting for the arrival of good weather, which is expectable from Sunday according to the weather forecasts. The annual crop forecast remains unchanged.

IRAN

It is still difficult to make accurate estimate as official statistics are not reliable. A reduction in volume is expected in the south and the expectations now are for a volume of 1.8 to 1.9 million tonnes instead of 2 million tonnes previously reported. Harvesting has not yet started in the north. Processors are facing many challenges this year including a water shortage, power cuts due to residential use being often favoured over industry in case of insufficient power, and growers selling to the fresh market where they can get better returns. Currency issues, notably due to the Iran-USA relations are also affecting the industry.

ITALY

In the North, during the month of May the tomato seedling transplant operations continued more normally with fewer problems due to rain. The temperatures have been within a normal

range and the development of the crop is fine much better than last year at the same date, and the canopy development is good. As of today, about 80-85 % of the fields have been planted and the operation will continue in the next couple of weeks in June to be completed by 15-20 June. The forecast remains unchanged at around 3 million tonnes.

In the Centre-South, the situation is normal for the tomato seedling transplanting that have been completed in Caserta area and it's nearly finished in other regions apart from some late crop will be planted in June. In Puglia the reduction of planted area is about 3,000 hectares, partially compensated by larger surfaces in other areas. The main concern remains the water availability for irrigation since the Occhito dam remain with a water volume halved compared last year (to date the water available is 75 million cubic metres compared to the value of 141 million cubic metres available last year). The crops are in good development conditions and no significant problems have been reported.

Total forecast for Italy remains unchanged at 5.6 million tonnes.

PORTUGAL

Weather finally started to improve in the last couple of weeks with temperatures of 25-30°C during the day and 15-16°C at night so planting operations were at 72% of total surfaces as of last Sunday and should finish around 10 June. It is however expected that not all the surfaces initially planned will be planted so the total volume expectation is adjusted from 1.4 to 1.35 million tonnes

SPAIN

The weather was finally good in May and transplanting is now nearly finished in Andalusia and in Vegas Altas in Extremadura. In the Vegas Bajas of Extremadura, 70% of the surfaces will be planted between 5 May and 5 June which will mean a concentration of the crop in September. Temperatures are now very high with 37 to 40 °C expected from today to Sunday so transplanting is often done at night or early or late in the day. A reduction of the total surface is probable but a possible diminution in the crop size from the 2.6 million tonnes previously expected can only be evaluated after the end of the planting, toward the end of next week.

TURKEY

The crop forecast is being lowered to 2.4 million tonnes. The reasons behind this is that the farmers did not like the prices given. In addition, the planting period was delayed due to weather. In the south the planting is over but with delays and in the North the planting is expected to be finished this week.

TUNISIA

The area devoted to growing seasonal tomatoes for industrial processing is around 15,000 hectares. As of 14 May 2025, water reserves stood at almost 952 million m³, spread across 36 dams, with a filling rate of 40%, a clear improvement on the 795 million m³ recorded for the same period in 2024.

In terms of plant health, the general state of crops is deemed acceptable, although a few localised fungal outbreaks have been detected. However, recent rainfall has caused soil waterlogging, disrupting the treatment schedule. Despite this, field observations reveal encouraging yield prospects, particularly in the governorate of Kairouan, where agronomic indicators (number of flowers, vigour of plant cover, etc.) are very promising.

The launch of processing operations is scheduled for the second half of June, with a gradual increase in the rate of tomato deliveries expected between the end of June and the beginning of July.

OTHER NORTHERN HEMISPHERE COUNTRIES

CALIFORNIA

The May USDA/NASS report was released on 29 May (see attached). Overall, there was very little change from the January numbers. The May acreage estimate is 205,000 acres (82,800 hectares) - in January it was 200,000 acres (80,800 hectares)- that are estimated to produce 10.3 million short tons (9,344 million metric tonnes) when in January was it 10.2 million short tons (9,25 million metric tonnes). The latest report reflects a yield of 50.24 ton/acre (112.8 metric tonnes per hectare). So far, the early stages of the season have gone very well and the crop looks as if it is going to start on time. Transplanting is very close to wrapping up for the season with just a few acres left to go.

CHINA

For the 2025 season, the surface to be planted is about 43,670 hectares, broken down as follows : 22,330 hectares in northern Xinjiang, 11,330 hectares in southern Xinjiang, 9,330 hectares in Inner Mongolia and 700 hectares in Gansu and Ningxia. The transplanting will be completed by the end of May, but due to extreme weather conditions such as gale and hail, the transplanted area has been affected. It is estimated that a volume of 5.1 million tonnes of tomatoes will be processed.

Only 82 factories should be running this season, a decrease of 24 compared to the 2024 crop and equivalent to the 2020 level. Consequently, the daily capacity is 214,000 tonnes, a decrease of 60,000 tonnes compared to 2024 (-22%).

It is expected that the price of fresh tomatoes will be USD 65MT, which is USD 11 lower than last year (-15%). Due to a significant decrease in the amount of fresh compared to last year, however, the price may increase.

China has accelerated tomato ketchup exports, speeding up inventory reduction. In January-April 2025, the total export of bulk and repack tomato products (HS CODE 200290) was 0.42 million tonnes, a year-on-year increase of 5% compared to 2024 (see attached)

JAPAN

There is no change of the forecast of 25,000 tonnes from 420 hectares. Transplanting has been completed except in Hokkaido and some areas of Honshu area. As of now, there have been no extreme heat or heavy rains, and the plants are generally growing well.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

The final production is 620,000 tonnes.

AUSTRALIA

As reported before, 2025 final production was 211,000 tonnes.

SOUTH AFRICA

South Africa planned a 160,000-tonnes harvest for 2025 season, mostly for local demand. The summer productions in the Western Cape ended on 70,000 tonnes as planned. Currently the northern winter production areas begin to deliver and are two weeks behind schedule, mostly due to cooler conditions. End May, about 60% of the total RSA volumes will be processed and the season should end in September 2025. The season is on track as planned, with currently no critical yield limiting issues.

OTHER COUNTRIES

NEW ZEALAND

The harvest finished on 9 May, which is two weeks later than planned. The Heinz Watties' factory had startup issues but performed well once the season got going. A total of 37,000 tonnes were processed this year, canning alongside paste. Average yield was 105 t/ha which was good considering the late start.

		World Processing Tomato Council		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.	43	Mem.	46	-28,3%	
		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.	1 850	Mem.	1 733	32,1%	
		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.	1 350	Mem.	1 471	-10,0%	
		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.	2 400	Mem.	2 583	-11,1%	
	Ukraine**	500	Mem.	550	Mem.	550	Mem.	390	0,0%		
	Subtotal AMITOM		17 070		17 214		16 953		16 497	-1,5%	
	of which members in EU		10 207		10 717		10 303		10 182	-3,9%	
	OTHER MEMBERS	Brazil	1 571	Mem.	1 650	Mem.	1 600	Est.	1 618	-3,0%	
		Canada	520	Mem.	493	Mem.	547	Mem.	520	11,0%	
		California	11 556	Mem.	9 999	Mem.	9 340	Mem.	10 356	-6,6%	
		China	8 000	Mem.	10 450	Mem.	5 200	Mem.	8 217	-50,2%	
Japan		26	Mem.	26	Mem.	25	Mem.	26	-3,8%		
Subtotal Other Members		21 673		22 618		16 712		20 737	-26,1%		
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 Northern Hemisphere		41 623		42 822		36 635		40 060	-14,4%		
SOUTHERN HEMISPHERE	MEMBERS	Argentina	586	Mem.	630	Mem.	620	Mem.	614	-1,6%	
		Australia	110	Mem.	211	Mem.	211	Mem.	183	0,0%	
		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		2 491		2 219	2,5%
	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.	37	Misc.	39	-5,1%	
		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		593		600	-0,3%		
Total Southern Hemisphere		2 747		3 026		3 084		2 819	1,9%		
GENERAL TOTAL		44 370		45 848		39 719		42 879	-13,4%		
of which members of the WPTC		40 899		42 263		36 156		39 453	-14,4%		
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

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