

WPTC CROP UPDATE AS OF 25 JULY 2025

AMITOM COUNTRIES

(Information collected during a videocall on Wednesday 23 July)

BULGARIA

There are no major issues so far this year but the high temperatures last week favour the development of thrips, mites and cotton ball worms. The harvest is scheduled to start around 7 to 10 Augst, a couple of weeks later than in 2024 due to the slow development due to the cold weather in May. There is no change in the forecast.

EGYPT

The summer harvest is at its peak and all factories are working. There is currently a serious heat wave with temperatures of up to 46°C expected for the next 5 days but its potential impact on the crop is unknown yet. The summer harvest in the middle governorates (**Beni Suif & Al-Fayoum**) should start mid-August and last until the end of September; the situation could be more clearer during first 10 days of August.

FRANCE

The harvest for conventional started early on Tuesday 15 July in the **south-east** as the tomatoes are maturing quicker than the normal cycle. Harvest for organic starter one week later. Quality is good so far with average brix above 5°. Harvest in the **south-west** should start end of next week but normally early August. There were some rains last weekend with more expected today but with no damage to date.

GREECE

The forecast remains unchanged, and the crop looks good so far but a heatwave this week with temperatures of 43°C is worrying operators. The harvest started on Monday in the **south** and factories in the rest of the country should open around 28 July.

HUNGARY

The development of the fields started in June, and by the end of the month there was a very vigorous and healthy canopy. The quality of the processing tomato fields is excellent, free from diseases and pests. The maturity of the fields is lower than usual at this time and we expect a start in mid-August based on the current situation. The quantity forecast remains unchanged.

IRAN

There hasn't been much change and the forecast remains the same at this point.

ITALY

In the **North**, the total surfaces planted are c. 45,000 hectares of which 41,000 in integrated production and 4,000 hectares of organics. The harvest started last week on 14/15 July and by next week all factories will be open. The harvest is expected to peak between 11 and 20 August. The early crop is normal with standard yields and quality with brix around 5°. POs,

however, fear that there will be a drop of yields in the middle of the season (it is too early to predict for the end of the harvest). The 3 million tonnes forecast is maintained.

In the **Centre-South**, the harvest started ten days ago and most factories are now open with the last ones expected by next week. Wholepeel production will start in the next few days as for now only cherry tomatoes, specialties and passata/pulps are produced. Quality is good so far but there are serious worries about the quantity for the late crop due to the low water availability in Puglia. This could be increase by the the high current temperatures which increase water requirements and may cause some flowers abortions. Around 30 to 40% of the volumes should be harvested in September. For now, the forecast remains 2.6 million tonnes but the exact surfaces planted are no known yet and there is a strong possibility than some fields may be abandoned due to lack of water.

PORTUGAL

We have had a few instabilities in the temperatures. After a heat wave of one week in mid-June, we had a week with some humid morning and temperatures at 23-26°C at the beginning of July, and the second week of July with mild weather not above 30°C. Night temperatures are usually cool at 17-18°C. For the current week we have an expected increase in the weather again being around 32-36°C for the following 10 days.

In general, the fields look good and stable in the normal cycle of maturation for the time of planting which means the start of the crop is still for the mid of August between week 33 and 34. However, a small area and from very early fields that were planting in sandy areas can be harvested in week 32 and one company estimates to start on that week with what's available from those areas.

The forecast remains the same.

SPAIN

Harvesting will start on 24 July in **Andalucia**, 2 weeks later than expected, the first week of August in **Vegas Altas(Extremadura)** and the second week of August in **Vegas Bajas (Extremadura)**, that means 2 and 3 weeks delay respectively. There was a heat wave with temperatures around 40°C at the beginning of July that lasted 10 days. The effect has been flower abortion in some varieties, but less than expected due to delayed growth of plants that were greener and healthier than in a normal year. Now the weather is normal. It is going to be a big percentage of harvesting in September, so final crop results will depend on weather behaviour during that month, where typically farm yields are lower than in August. We keep the same forecast for now.

TUNISIA

As of 20 July 2025, almost 589,000 tonnes of tomatoes had been processed by 22 industrial units.

TURKEY

There harvest started last week in the **south** and all the factories there should be running by the end of the week. As reported before the biggest reduction in the volumes is expected in this region. Crop delays are also expected, and operators are currently struggling with very high temperatures (above 40°C) although these should ease in the next few days.

In the **north**, factories should open slowly around 5-10 August, with the peak reached from 15 August and most of the production in September.

Crop look good with a normal disease pressure, and the forecast remains unchanged.

OTHER COUNTRIES

BRAZIL

There is not change to the forecast.

CALIFORNIA

The estimate is to process 758,233 tons this week. At the end of this week (week ending 7/26) we will have processed 1,487,876 tons. The weather has been ideal for crop development/set in June and July. The overall crop quality is very good at this time. So far yields are at or above contract currently. While harvest has been going up **north** for a while, volume will start picking up this weekend as more plants ramp up production.

CHINA

The forecast remains unchanged. The 2025 harvest season will start in early August.

JAPAN

There is no change of the forecast of 25,000 tonnes from 420 hectares. The harvest began in early July in parts of the **Chubu** and **Kanto** regions. At the moment, crops are generally growing well across the country. However, there are concerns that damage may occur from extreme heat and heavy rain over the next month.

SOUTH AFRICA

The South African harvest projects to a 160,000-tonne season for 2025. The tomato brix is lower than the normal in the winter production areas. The producer yield remains as planned with no critical diseases. Currently over 75% of the planned harvest has been processed and the production season should end in September on schedule.