

## WPTC CROP UPDATE AS OF 22 AUGUST 2025

### AMITOM COUNTRIES

*(Information collected during a videocall on Wednesday 20 August)*

#### BULGARIA

The harvest has now started in all areas with average brix over 5. Operations are now interrupted due to rain yesterday but should restart tomorrow.

#### EGYPT

Nothing changed from last update other than the high temperatures have advanced the harvesting from middle governorates (**Beni Suif & Al-Fayoum**) which mainly the same source for **Nili** crop, so harvesting shall extend to September.

#### FRANCE

As of 15 August, just over 61,000 tonnes have been processed which is about 35% of the forecast, so it is an earlier crop than last year. Quality is good with an average brix of 5.22 and a rebate rate of 6.22%. The heatwave of the last ten days has now ended, and rain started yesterday with more expected today. There is some concern regarding the quality of the tomatoes to be harvested in the next few weeks as maturation has been accelerated due to the heat, and pests like mites have started to develop.

#### GREECE

Thanks to a very good weather with temperatures around 33-37°C the harvest is progressing well with about 70% of the volume already processed in the south and 50 to 55% in the centre where yields are higher than normal and the quality excellent. The estimate is therefore increased from 450,000 tonnes to 500,000 tonnes.

#### HUNGARY

The tomato harvest started at the beginning of the week. The temperature is still below normal for this time of year, so we expect a continuous volume development until approximately 25 August, when the processing capacities are expected to be adequately loaded. The annual forecast remains unchanged.

#### IRAN

The crop is delayed by one or two weeks in the **Centre** and **North** and factories are still processing at low capacity. The heatwave has also affected the crop but the temperatures should go down this week. The forecast is maintained at 1.6 million tonnes but may need to be adjusted until the season ends at the end of September.

#### ITALY

In the **North**, the last OI data showed that one million tonnes had been processed as of 10 August. Last week the rate of supply was good but factories are not yet at the maximum capacity and it is estimated that 1.3 million tonnes had been processed as of 17 August. Fruit

quality is very good with an average brix of 5.25 but farm yields are lower than usual for the middle crop at under 70 t/ha. The total size of the crop will depend on the middle and late crop but it is foreseen that it may be lower than the 3.2 million tonnes announced. The OPs are meeting on 20 August and more information will be available then. Some rain is expected tomorrow and may stop the factories for a day or two.

In the **Centre-South**, the harvest is progressing very slowly with delays in ripening especially for the long tomatoes. There are losses in the fields due to split ripening and lots of green tomatoes are arriving in the factories. Processing yields are low and factories, opened early but never reached full capacity. This is leading to increases the contract price and a lower industrial yield to maintain the high quality standards typical of Italian products. For now, the forecast remains 2.6 million tonnes but reaching it will depend on a very good September.

## PORTUGAL

All the factories are now open with the last two doing so this week. So far colour is good but brix is lower than usual. Temperatures are now back to normal levels of 28-31°C with cool evenings and the weather forecast is good for the next ten days. The early August heatwave has fastened the maturation and may cause some losses but it is too early to revise the forecast which remains 1.35 million tonnes. There will be more clarity in a couple of weeks.

## SPAIN

Overall the harvest is late with an estimated 17% of the total volume processed as of 15 August, when normally it should be about 33%.

In **Extremadura** the last factory opened this week but none is yet at full capacity, while in **Andalucia** factory input is now reduced after a couple of weeks at full capacity which enabled to be now at about 40 to 45% of the total forecast in the region.

From the 1st August until the 17th, temperatures have been very high with a week of temperatures over 40°C and sometimes reaching 45°C in Extremadura. The weather has now cooled since Monday. The heat will have some impact on the size of the crop, the extent of which will also depend on the weather in September, but the overall forecast is for now reduced from 2.6 to 2.5 million tonnes as farm yield are being lower than expected.

## TUNISIA

To date 880,000 tonnes of tomatoes have been processed and only 6 plants remain open.

## TURKEY

In the **south**, the crop as of 15 August was around 60% harvested. By the end of August the region will start to wind down.

In the **Marmara** region the crop has been underway since the 5th of August and as of the 15th of August has harvested around 20%-25%. This area is expected to reach peak in the first week of September.

The weather seems clear for the near forecast. The raw material quality is good. The forecast remains unchanged.

## UKRAINE

Processing has started. Field yields are good and paste colour is better than usual at the beginning of the season. There is no change in the forecast.

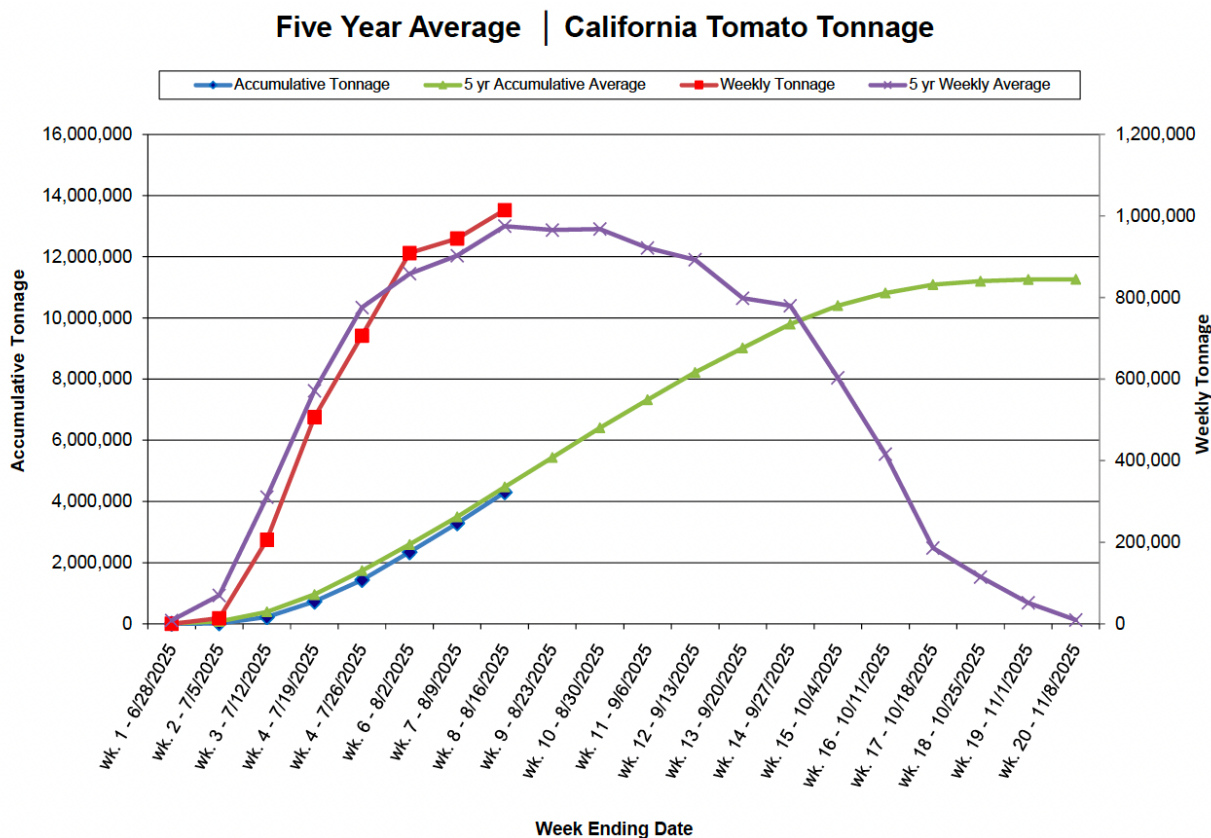
## OTHER COUNTRIES

### BRAZIL

No change to the forecast.

### CALIFORNIA

The estimate is to process 1,012,810 short tons (998,992 metric tonnes) this week (first million ton week). At the end of this week (week ending 23 August) we will have processed 5,359,717 tons (4,861,603 metric tonnes). There is very little difference from the last two reports. The crop continues to perform at or above contract statewide. Overall quality continues to be very good in all aspects. We are very close to running at capacity for this season.



### CANADA

The harvest season is officially underway, having started last week with crop quality looking good. This week's weather has seen cooler temperatures and periods of rain.

### JAPAN

There is no change of the forecast of 25,000 tonnes from 420 hectares. In **Ibaraki Prefecture**, Japan's largest production area of tomatoes for processing, tomatoes are growing well and harvesting is progressing smoothly. Harvesting began in early August in the **Tohoku region** and mid-August in **Hokkaido**. Although high temperatures and drought have caused some disease, growth is proceeding relatively smoothly.

### SOUTH AFRICA

To date, 88% of the planned total volume has been processed and the projection is still unchanged at 160,000 tonnes for 2025 season. The main processing season should end within the next 5 weeks.