

WORLD PROCESSING TOMATO COUNCIL

Crop update as of 19 September 2013

AMITOM countries (from a conference call held on 18 September)

France

In the south-east the cold weather is slowing the maturation of the tomatoes with many greens in the fields, while in the south-west diseases are still an issue and rains are interrupting harvesting. Only about 85 000 tonnes had been delivered at the beginning of the week. Harvesting will continue until mid-October but is now unlikely to reach the 170 000 tonnes forecast.

Greece

The weather remains very good and the yields are better than expected at c. 90t/ha on average. Consequently 400 000 tonnes have already been delivered (95% of forecast) and the forecast is likely to be exceeded to 415 000 tonnes probably. Brix are higher than at the start and the quality is good.

Italy

For the northern district the situation at the date of 8 September was as follow:

Total quantity processed 1.26 million MT with average brix of 4.98 and average reject 4.08%. This quantity represents 50.7% of the contracted quantity. This percentage is very low compared with the same date of 2012 (72%) or 2011 (79.6%) and this gap will be unlikely filled in the coming weeks because the yields of late crop seems not to be as the expectation.

In fact due to the delay of transplantation and the difficult season we had, there is a lack of ripening and a % of green fruits higher than normal that give lower quantity available and delivered to processors. Last week, the tomato harvest rate was high, but faced a new slowdown because of a new storms and rain on Sunday 15th and many factories stopped their operation for a couple of day. Tomato quality remain good with a brix average around 4.90 and at the moment there are no reports of disease problems, although there is some concern for late blight due to last rain and drop of temperature.

The prediction of the end of the harvest is expected around September 25 in the east, while the west is expected to be completed in early October

For the centre-south district the situation at the date of 8 September was as follow:

ANICAV processed 68.17% (in 2012 was 63.87%) but the quantity contracted this year is lower. Quality is good, but we have a big percentage of green tomatoes remaining in the fields for the strange weather. ANICAV processed about 1.43 million MT, but we have to add 0.12/0.15 million MT of other company outside our Association. There is a strong competition among several factories on fresh tomatoes. We processed 39.5% in whole peeled, 10.0% in Paste, 16.1% in Passata, 32.5% in diced and 1.9% in cherry tomatoes. We had some rains last week, but we have now good forecast for the next 10 days

We still think that we can overpass 2.0 million MT in Center South Italy, so Italy can still reach 4.1 million MT.

Portugal

The weather is currently good but the crop remains very late with lots of tomatoes remaining green in the fields. Factories are only running at only about 80% of their capacity with c. 120 000 MT processed per week for a capacity of c. 150 000 MT/week. Farm yields are only averaging 80 t/ha this year, which is 15% below 2012 levels. Only about 50% of the 1.1 million

MT forecast will have been processed at the end of the week but this estimate can be reached if conditions remain good over the next 3 weeks.

Spain

As of 15 September, 1.335 million MT had been delivered; this is 14% less than at the same date in 2012. The harvest is nearly finished in Andalusia where only one factory remains open. In Extremadura, a few factories are closed but most will remain open until around 25 September. In the Ebro valley, the crop is still very late and harvest will continue until November. Fruit quality is generally good.

The final production is likely to be between 1.65 and 1.7 million tonnes.

Tunisia

As of 15 September 560 000 tonnes had been processed. Processing continues in 4 factories with late tomatoes with a volume of c. 2500 tonnes processed daily. The total forecast remains 580 000 tonnes.

Turkey

The weather was very good until two days ago when heavy rains started and more rains are forecast next week. Consequently the forecast is maintained at 1.8 million tonnes when production could have been higher if the weather had stayed dry.

Ukraine

Heavy rains started in the middle of the last week and harvesting stopped in all areas. This week some rains are forecasted. No damage to tomatoes has been reported by now. Factories should start processing in the middle of this week. "September" tomatoes are ripening later than were expected due to very cold weather. Brix before the rain was higher, than in August.

Volume forecast remains the same at 400 000 tonnes but the season will last till 10 October.

Other WPTC countries

California (Mike Montna, 19/09/13)

Yields continue to disappoint in the Southern growing area and stay below contracted levels. In the Northern part of State, deliveries continue to do well and are at or above contract for most of the season. The non-paid weight continues to increase above historical averages. Last week the State averaged 8.2% non-paid. At this time the total crop estimate appears to be closer to 12 million short tons (10.88 million MT).

The weekly update reports from CLFP can be found at: <http://clfp.com/2013-tomato-weekly-delivery-reports> (latest one attached).

Canada (John Mumford, 17/08/13)

Nothing really new to report. Delivered tonnage is about 50% of contract, but as previously reported the season is expected to end early well short of contract volume.

China (Qin Yelong, 18/09/13)

Tomato paste production has almost stopped in China for 2012 season. By the time of reporting, there are 12 factories in Northern Xinjiang have concluded their 2013 season production and by mid next week, there will only 4-5 small factories running. The production has ceased in Inner Mongolia as reported last time and in southern Xinjiang as of September 18. With the overall picture getting more and more clear, we estimate that the crop in China is 3.65 million MT (2.05 million MT from Northern Xinjiang, 1.25 million MT from Southern Xinjiang plus 0.35 million MT from Inner Mongolia), around 10% different with what we got last time. The following reasons contribute to the changes mentioned above:

- The throughput of some of the small factories has not been properly informed to the industry, and thus not included in the previous estimate;

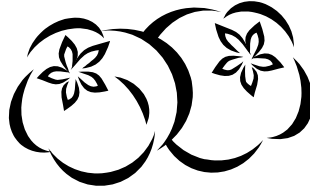
- Due to the shortage of raw tomatoes this season, some that are not generally ideal for processing such as green fruits have been delivered to the factories and thus included in the overall throughput.

Japan (Takashi Tsutsumi, 11/09/13)

There is no change to the forecast in Japan.

South Africa (Andries Cronje, 19/09/2013)

There is no change to the forecast. The harvest should be finished in three weeks.





DISTRETTO DEL POMODORO DA INDUSTRIA DEL NORD ITALIA

CAMPAGNA 2013 SEMPRE PIU' DIFFICILE

CONSEGNATO SOLO IL 39% DEL POMODORO CONTRATTATO

AD OGGI RACCOLTA LA META' DEL PRODOTTO RISPETTO ALLO STESSO PERIODO DEL 2012

E' una campagna che si conferma sempre più difficile quella in corso nel Distretto del Pomodoro da Industria del Nord Italia.

I dati raccolti dal Distretto – l'Organizzazione Interprofessionale che rappresenta il 99 per cento della filiera del pomodoro da industria del Nord Italia – mostrano un quadro particolarmente critico visto che ad inizio settembre la quota del prodotto consegnato su quanto contrattato si attesta soltanto al 39,47 per cento. L'unica nota positiva arriva dalla buona qualità del pomodoro, con un brix medio ponderato pari a 5, ma il problema principale resta la scarsità di materia prima come dimostra il confronto con l'andamento delle campagne degli anni passati: nello stesso periodo del 2012 si era già consegnato il 67 per cento del contrattato, mentre nel 2011 si era addirittura al 71 per cento. Per dare un'idea del ritardo e delle difficoltà del 2013 la percentuale di raccolta attuale, prossima al 40 per cento, era stata raggiunta, rispetto a quest'anno, con due settimane d'anticipo nel 2012 e addirittura con tre settimane d'anticipo nel 2011.

Il 39,47 per cento attualmente raggiunto corrisponde a 981.547 tonnellate conferite rispetto a 1.720.036 t. dello scorso anno ed a 1.922.418 t. di due anni fa. In sostanza manca ancora quasi la metà del pomodoro rispetto agli anni passati, e con l'attuale andamento della campagna non è facile pronosticare recuperi particolarmente significativi, vista l'incognita del maltempo che, come già accaduto nei mesi scorsi, potrebbe ulteriormente condizionare in negativo l'andamento della campagna in corso nel mese di settembre.

La campagna di quest'anno, partita già con una contrazione delle superfici effettive del 12,8%, pari a - 4.289 ettari rispetto al 2012, è stata fortemente condizionata dal maltempo primaverile, che ha fatto slittare i trapianti di un mese ed anche il tendenziale recupero che il Distretto aveva auspicato tra fine agosto e inizio settembre, è stato complicato da condizioni atmosferiche non del tutto favorevoli alla maturazione del pomodoro.

Al momento attuale è ancora difficile fare previsioni, ma vista la lentezza della campagna imputabile ai ritardi nella semina, ai conseguenti ritardi nella raccolta causati dal maltempo e alla difficoltà di maturazione del prodotto, potrebbero esserci dei problemi nel raggiungimento degli obiettivi produttivi e si potrebbe determinare un significativo ammanco del prodotto richiesto sul mercato.

Ad oggi, tuttavia, il Distretto non ha ancora formulato nessuna previsione sulle quantità che saranno complessivamente raccolte a fine campagna né sull'ammanco prevedibile di materia prima.

Da parte del presidente del Distretto del Pomodoro da Industria del Nord Italia Pier Luigi Ferrari è arrivato un nuovo invito alla coesione per la compattezza della filiera. <Il momento non è certo dei più facili viste le tante difficoltà che si sono dovute affrontare nel corso di questa campagna – ha commentato Ferrari –, ma il Distretto garantisce il massimo impegno negli ambiti di propria competenza affinché le problematiche possano essere superate con successo e si possa favorire un comparto che produce una delle eccellenze economiche italiane>.

In allegato foto della raccolta del poco pomodoro di quest'anno.



CALIFORNIA TOMATO TONNAGE

Weekending September 14, 2013
report released September 16, 2013

To Members:

Following are the certified and paid for tonnage figures by county, as shown by certificates for Weekending September 14, 2013.

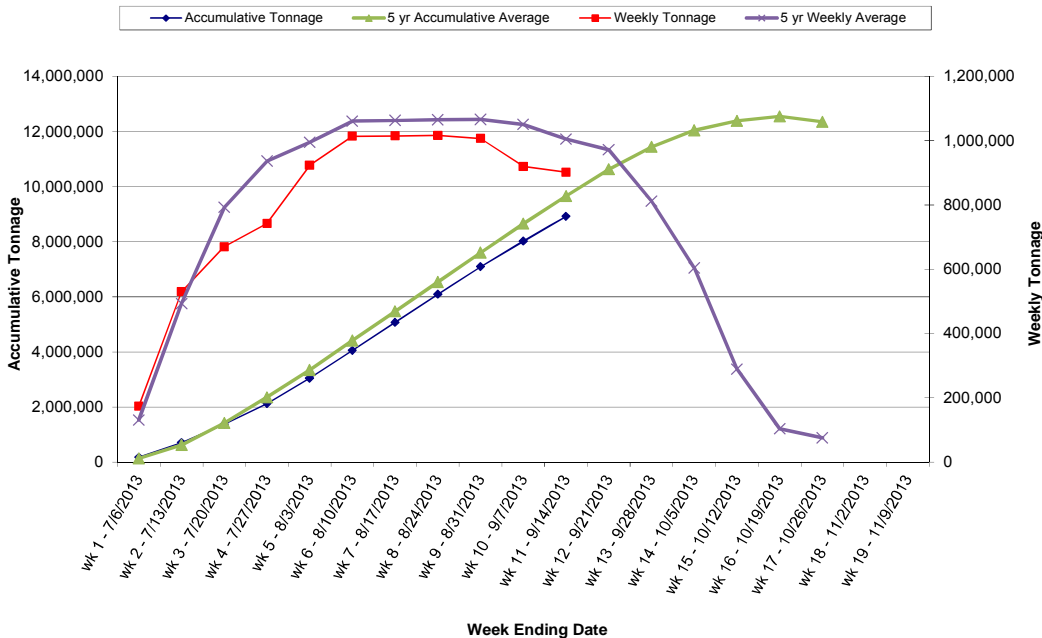
COUNTIES	-----2013 TOMATO SEASON-----			
	2012 Accumulative Total to September 15	Previous Total to September 7	Receipts Wk Ending September 14	Accumulative Total to September 14
Colusa	464,622	517,330	38,107	555,438
Contra Costa	94,555	117,770	0	117,770
Fresno	4,630,353	3,826,927	278,704	4,105,667
Glenn	0	3,820	0	3,820
Kern	607,807	474,820	14,008	488,828
Kings	1,244,883	848,916	74,534	923,451
Madera	114,013	103,840	9,842	113,682
Merced	246,083	332,318	94,358	426,618
Sacramento	19,580	4,581	8,204	12,786
San Benito	16,333	6,169	23,083	29,252
San Joaquin	246,231	167,111	98,825	265,936
Santa Clara	0	5,536	13,658	19,194
Solano	180,593	188,701	44,860	233,561
Stanislaus	198,664	153,626	44,723	198,349
Sutter	147,484	152,605	20,798	173,403
Tulare	0	203	0	203
Yolo	1,049,103	1,113,814	138,343	1,252,185
Statewide Totals	9,260,304	8,018,087	902,047	8,920,143

Weekly tonnage for weekending September 14, 2012 was 1,045,457.

Projected tons for weekending September 21, 2013 is 897,000.

Information provided by the California Processing Tomato Advisory Board

2013 California Tomato Tonnage





WPTC World production estimate of tomatoes for processing (in 1000 metric tonnes)

Date of last update: 19/09/2013

		2011		2012		2013		AVERAGE	VARIATION	
		FINAL		FINAL		FORECAST		2010 to 2012	2013 vs 2012	
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Algeria**	280	Mem.	300	Mem.	300	Est.	307	0%
		Egypt	210	Mem.	255	Mem.	250	Misc.	170	-2%
		France	192	Mem.	192	Mem.	160	Mem.	202	-17%
		Greece	324	Mem.	390	Mem.	415	Mem.	591	6%
		Iran**	1 850	Mem.	1 750	Mem.	2 000	Mem.	1 883	14%
		Israel	218	Mem.	200	Mem.	210	Mem.	233	5%
		Italy	4 950	Mem.	4 500	Mem.	4 100	Mem.	5 259	-9%
		Malta**	10	Mem.	6	Misc.	9	Mem.	10	42%
		Morocco	178	Mem.	130	Mem.	130	Est.	170	0%
		Portugal***	1 065	Mem.	1 190	Mem.	1 100	Mem.	1 178	-8%
		Spain***	1 985	Mem.	1 935	Mem.	1 670	Mem.	2 098	-14%
		Syria**	160	Est.	50	Mem.	50	Mem.	123	0%
		Tunisia	868	Mem.	840	Mem.	580	Mem.	853	-31%
		Turkey	1 940	Mem.	1 750	Mem.	1 800	Mem.	1 657	3%
		Ukraine**	440	Mem.	385	Mem.	400	Mem.	368	4%
Subtotal AMITOM		14 670		13 873		13 174		14 353	-5%	
of which members in EU		8 526		8 213		7 454		8 774	-9,2%	
OTHER MEMBERS	Brazil	1 590	Mem.	1 294	Mem.	1 600	Mem.	1 560	23,6%	
	Canada	426	Mem.	503	Mem.	400	Mem.	465	-20%	
	California	11 067	Off.	11 460	Off.	10 884	Mem.	11 227	-5%	
	China	6 792	Mem.	3 230	Mem.	3 650	Mem.	5 411	13%	
	Japan	27	Mem.	37	Mem.	35	Mem.	34	-5%	
	Subtotal Other Members	19 902		16 524		16 569		18 697	0,3%	
NON MEMBERS	Bulgaria	22	Est.	22	Est.	30	Misc.	22	36%	
	Czech Republic	15	Est.	15	Est.	15	Est.	12	0%	
	Hungary	63	Misc.	15	Misc.	35	Misc.	38	133%	
	Poland	210	Misc.	165	Misc.	160	Misc.	183	-3%	
	Slovakia	20	Est.	20	Est.	20	Est.	16	0%	
	Jordan							-		
	Russia	58	Misc.	67	Misc.	75	Misc.	62	12%	
	Uzbekistan							-		
	USA excluding California	412	Off.	488	Off.	470	Misc.	445	-4%	
Subtotal Non Members	800		792		805		757	1,6%		
Total Northern Hemisphere		35 372		31 189		30 548		33 808	-2,1%	
of which WPTC members		34 572		30 397		29 743		33 051	-2,2%	
of which European Union		8 856		8 450		7 714		9 045	-8,7%	
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	355	Mem.	360	Mem.	415	Mem.	368	15,3%
		Australia	87	Mem.	185	Mem.	193	Mem.	179	4,3%
		Chile	794	Mem.	668	Mem.	682	Mem.	775	2,1%
		South Africa	112	Mem.	125	Mem.	115	Mem.	126	-8,0%
		Subtotal members	1 348		1 338		1 405		1 448	5,0%
	NON MEMBERS	Dominican Republic	280	Misc.	245	Est.	250	Misc.	228	2,0%
		India	130	Est.	130	Est.	130	Est.	130	0,0%
		Mexico	40	Misc.	50	Misc.	40	Misc.	60	-20,0%
		New Zealand	68	Misc.	70	Misc.	78	Misc.	65	11,4%
		Peru	64	Misc.	80	Misc.	99	Misc.	67	23,8%
Senegal	90	Misc.	40	Misc.	40	Misc.	62	0,0%		
Thailand	260	Est.	260	Est.	260	Est.	260	0,0%		
Venezuela	40	Est.	40	Est.	20	Est.	40	-50,0%		
Subtotal non members	972		915		917		912	0,2%		
Total Southern Hemisphere		2 320		2 253		2 322		2 360	3,1%	
GENERAL TOTAL		37 692		33 442		32 870		36 168	-1,7%	
of which members of the WPTC		35 920		31 735		31 148		34 499	-1,9%	
WPTC as percentage of total production		95%		95%		95%		95%	-0,1%	

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

** AMITOM associate members

*** Tomatoes produced in Portugal but processed in Spain are reported in Spain

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