



WORLD PROCESSING TOMATO COUNCIL

WPTC crop update as of 16 September 2011

AMITOM countries (from a conference call held on Wednesday 14 September)

EU:

Spain

In Extremadura the harvest is nearly finished with 90-95% of the forecast processed to date. Some factories have already closed and most will close next week. Some heavy rain early in September in the south of the region (up to 50mm) stopped factories for 3 or 4 days but the weather has been good since. The quality of the fruit is good with brix averaging 4.9 to 5 in the north and 4.7 in the south but there is still an issue with irregular ripening of the fruit.

In Navarra processors are operating at full capacity with good weather and good quality of fruits. The harvest will continue into October.

The total forecast remains 1.9 million tonnes, maybe a bit less.

France

As of 11 September 74% of the program of 200 000 tonnes had been processed. It rained heavily on Sunday 4 September in the south-east but the weather has been favorably hot since. The factories are running normally although the output has been reduced in the last few days as there are many green tomatoes due to irregular ripening. This situation should improve next week and the weather forecast is good for the next 7 to 10 days. Apart from the green tomatoes the quality is good although brix is 0.1° lower than last year at 4.7° on average.

The forecast remains in the 190 000 to 200 000 tonnes range.

Italy

North: The last survey from the "Distretto del Pomodoro da Industria del Nord Italia" shows that 4th September 1.92 million tonnes of tomatoes had been processed, with an average brix of 4.99.

On 5th September, rain stopped factories for a few days with most restarting on 7th or 8th. This week is one of the last weeks of the crop with some factories now closed, some will close at the end of next week. No harvesting will take place in October as the late varieties will ripen by the end of September due to the weather conditions.

Field yields are lower than expected but the quality is good with low HMC, a good colour and a better brix.

South: On 8 September 1.82 million tonnes had been processed by ANIVCAV members who represent 96% of the total volume. The distribution by products was: 41% wholepeel, 33% diced, 13% passata, 3% cherries and 10% paste.

It is expected that harvesting will finish early at the end of September with a total of 2.1 million tonnes.

The quality is good although field yields are lower especially for the late crop due to the heat in August. The temperatures are still high and tomatoes ripen fast. Some factories have now closed; other will close this week although many have not achieved their target especially for retail products.

The total forecast for Italy remains 4.5 million tonnes.

Greece

The weather has recently been very hot with no rain which is unusual. This caused an unexpected peak with tomatoes ripening early. In consequence, factories will close early with most closing next week or by the end of September. Some in the south are already closed. Brix is a little better than last year (+3 to 5%) although it dropped in the late crop, general quality is good but the yields are reduced with the total forecast now of 330 000 to 340 000 tonnes.

Portugal

Following the last teleconference it rained heavily (approx 50 mm) in the main growing region. This led to a stoppage of processing of 3-4 days. The weather has since then been dry and very warm and from a situation where there was insufficient ripe fruit to sustain maximum capacity at all factories we have moved to a position where too much is available. This situation should be maintained for another 3 or 4 weeks and the final outcome of the season remains dependent upon, (following the rain) how the tomatoes hold in the field and the weather as we approach the end of September and go into October. Tomatoes processed up to Sunday 11th of September was 58,5% of the 1 million tonnes forecast which is maintained.

Non-EU:

Turkey

The weather is good, very hot and the forecast good for the next 5 days so the total volume is likely to reach the initial 1.8 million estimate. It is however difficult to know exactly as fresh market tomatoes are being processed although there is a labor shortage for harvesting. The quality is good with an excellent color although brix are low, meaning factory yields are 5 to 10% lower than in a normal year so the quantity produced is not what was planned.

Ukraine

The crop is running at full speed now. By 13 September 55% of the forecast has been processed. All processors had to stop for a day or two last weekend due to rains. According to recent weather forecast, we are not expecting rains in coming 10 days. The tomato quality is generally good. Average Brix of tomatoes delivered in August was 4.95 and it is slightly lower in September at 4.7.

The forecast remains the same at 400 000 tonnes. The season should stop in the first week of October.

Iran

The forecast of 2 million tonnes could be reduced if the extreme heat continues but it is maintained to date. The production peak was postponed by 3 weeks, and the harvesting will continue into October.

Tunisia

Only 2 or 3 factories are still processing very small volumes and the total volume will be close to 850 000 tonnes.

Algeria

Final production was close to 280 000 tonnes with the production of about 50 000 tonnes of paste. Yields were reduced due to the abnormal rains in May and June and the development of diseases (late blight).

The total forecast for the AMITOM countries (11 member countries + 5 Associate members) now stands at 13.97 million tonnes, of which 7.93 million tonnes for the 5 EU countries.

Other WPTC countries

California

The crop will be 68% completed by weekending 17 Sept 2011. The industry should process 1 million plus tons for another 2 weeks before we see a drop off as a few processors complete their pack. The weather is starting to cool down in the state with temperatures in the upper 80's to low 90's. The Northern part of the state is still seeing yields that are currently running 5-10% below contract. This is mainly due to split sets and some disease. The Central part of the state is currently close to contracted levels and is going to start heavier deliveries now until the end of the season. The Southern part of the state has seen very good yields that are above contracted amounts and the quality continues to be good. Just like other parts of the world, good weather will be needed through October to reach the 12.2 million ton estimate.

See <http://www.clfp.com/2011-weekly-tomato-stats> for the latest weekly report.

Canada

The harvest is just over 40% complete. Multiple rains at the end of last week have made harvesting very difficult. Processors are now reporting that they will come up short of contract. Will need until at least the middle of October to complete harvest.

China

On August 28-29, heavy rainfall hit most growing regions unexpectedly, causing losses to local crops. Some un-harvested fruits rotted away because of soaking by water. Estimates show that the loss rate might reach more than 20% in some regions.

Another negative factor to the volume is the concentration of processing season this year, because the hot weather in May and June had led to early ripeness of many tomato varieties (mainly in North Xinjiang). The short peak season, plus the limited processing capacity caused unnecessary wastes of fruits. Also to make things worse, 2 new factories could not start operation this season and another started in late August: most of the crops grown for these plants were left un-processed, which increased losses to the processing volume.

Given the foregoing reasons, although we have a very good crop production this year, we predict the Chinese processing volume this season will decline from 6.9 million metric tonnes (prior forecast) to 6.6 million MT.

So far about 5.7 million MT have been processed in China.

Although there are rumors that fungal diseases are affecting the crop, disease development is not an issue at the moment.