



## WORLD PROCESSING TOMATO COUNCIL

Crop update as of 22 August 2014

### AMITOM countries (from a conference call on 20 August)

#### European Union:

##### **France**

The harvest is progressing in relatively good conditions with nearly 40 000 MT harvested at the end of week 33. This week all factories should be operating both in the south-east and the south-west. The quality is there with good brix to date. In the south-west, however, some fields are affected by blight on the leaves but not always on the fruits. The yields will probably be reduced. To date, we confirm the 180 000 to 190 000 MT forecast.

##### **Greece**

The weather is hotter than usual with 40-41°C last week but it has not had any detrimental effect except quickening ripening. Factories are now at full capacity and 33% of the total forecast had been processed as of 18 August. The forecast for the coming days is good with hot weather expected. The quality is good and brix levels similar to last year. The initial forecast of 480 000 MT is still on the cards.

##### **Italy**

###### **North**

As of 10 August 600 000 MT had been delivered to factories, 21% of the volume contracted. The weather is very unusual this year and because of the heavy rains in July and early August, the brix is very low at 4.61° average meaning very low yields in the factories (about 10% lower than normal), even for diced as tomatoes are very soft and difficult to peel. It will be difficult to reach the target of 2.4 million tonnes if this weather continues and even if this volume is achieved the quantity of finished products will be at least 10% less than planned. A new update will be released by Distretto in the next few days.

###### **South**

The situation is a bit better than in the north despite several rains in July and a few in August. All factories are now at full capacity and should be until about 10 September. The crop is about one week late overall and about 30% of the program had been achieved so far. The forecast of 2.4 million tonne should be reached if the weather is favourable in September. The brix levels are also lower but it is not an issue for whole peeled tomatoes, which represent 50% of the volume.

The total expectation for Italy is now about 4.7 million tonnes but with a reduction in the volume of finished products.

##### **Portugal**

The harvest is progressing normally with good quality of tomatoes and a brix of about 5.1-5.2. The last small factory opened on Monday and most factories have been running at full capacity last week and this week. The temperatures are lower than normal with 29°C at the weekend and only 24-25°C yesterday. The weather outlook is good until the end of August and the 1.3 million tonnes estimate should be reached and probably exceeded if the weather remains good until the end of September. The surfaces planted have been confirmed to be 17 250 ha.

## **Spain**

Similarly to in Portugal the harvest has been going well so far with good quality fruits but the temperatures are lower than normal. As of 15 August, 35% of the total forecast had been delivered. In Andalusia, one factory has already closed but the others should stay open until the end of August. In the North, the first factory started last week and the full capacity should be reached next week. The forecast is maintained at 2.25 million MT.

## **Non EU-countries:**

### **Iran**

All factories are running now but they have not yet reach full capacity except in Caspian Sea zone. The weather is good and the total forecast maintained at 2.1 million MT depending on a good October.

### **Russia**

There is typical summer August weather in the South of Russia. Quite OK for tomatoes (in some regions too many rains than needed). The quality of tomatoes and therefore the products is good. We are now well in season and have already processed about 20% of the crop. There is no reason to change the forecast 80 000 MT at the moment. Nevertheless, under pressure of certain sanctions and “anti-sanctions” (against and from Russia) there is a growing desire of local processors to increase production plans. If processors are able to accept rising prices of tomatoes we will see up to 10% increase in total volumes processed.

### **Tunisia**

Processing continues at a daily rate of 6 000 MT/day with 18 out of 24 factories running. As of 18 August, 580 000 MT have been processed. Tomatoes now come from the (relatively late) North-West regions of mainly Jendouba, Kef, Béja, Siliana and Bizerte. Weather conditions remain favourable although there is a risk of sirocco and storms. The initial forecast is maintained until the final result is available.

### **Turkey**

Turkish crop is now expected to be around 2 million, down from 2.2 million MT. Unfortunately earlier rains affect field yields negatively. 80-85% of harvesting in Southern plantation has finished, prices were stable around USD 105-110/MT as planned. In the North, however, harvesting hasn't affectively started yet with only small quantities delivered until now. It is expected that Northern harvesting will speed up this weekend and especially after 1 September. The season is almost 2-3 weeks late in Northern plantation area with factories at 15% of their program in general. Prices in free market tend to increase at around USD 140/MT delivered (contract prices are around USD 110/MT). The bulk of harvesting will finish by end of September and depends on good weather conditions in September. Small quantities might be delivered within early October 14.

### **Ukraine**

The weather is good for tomatoes and the harvest is running well with 17% of the estimate processed at the end of last week. Tomatoes are still late and in some cases too many greens were harvested. It looks like we are running in the first week of October. All processors agree brix of tomatoes delivered is higher than last year (roughly +0.2°) while quality varies from area to area. Total forecast remains unchanged.

<b>Other WPTC countries</b>
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### **Brazil**

The processing tomato season in Brazil began with the planting in February and early harvest in the last week of June. Due to the good weather to date, we should have a good crop this year, with a forecast of 82 MT/ha on average for a surface planted of approximately 17 650 hectares. In general, the areas have low disease pressure. Mean brix is 4.5. There is however some concerns that large surfaces were planted in late season which increases risks due to rain.

## **Canada**

Cooler than normal temperatures have delayed crop maturity. Harvest started this week and is expected to continue through mid-October.

## **California**

The situation has stayed relatively the same since the last report in terms of volume, quality and brix. The estimate is to process 1,068,000 short tons this week. At the end of this week (Aug. 23), the industry will have processed a total of 6,954,249 short tons (6.3 million MT). Overall the industry is still running approximately 10% below current capacity. At this time, overall yields are running at or slightly below contract. On August 28, the NASS will release the latest crop estimate.

## **China**

Most factories in Xinjiang and Inner Mongolia have started operation. As of Aug 17, about 600 000 MT fresh tomatoes have been processed, 10% of total estimate production for this crop. The shortage of early-crop material has triggered fierce competitions in Xinjiang. It is estimated that factories will run into peak production around Aug. 25.

Recently a cold wave has hit Xinjiang and there were showers in some production areas and the local highest temperature during the day fell to 22 degree centigrade. Weather report says that there will be rain in Inner Mongolia during Aug. 21-23. The weather from late August to early September will be crucial to productions of this crop.

## **For 2015 harvest:**

### **Argentina**

In Argentina about 7 400 ha should be planted for a volume forecast of about 450 000 MT. Planting started on July 20 in the North-West (Salta an Jujuy provinces) and on August 15 in Cuyo (main region) but to date only about 10% of the total surface has been planted.

### **Chile**

It is expected that about 9 000 ha should be planted in Chile for 2015 harvest with an expected average yield of 95 MT/ha which would bring the crop size to 855 000 MT. Planting should start early on 10 September with the aim to start processing around 22 January. Conditions are better than for the last few years with more rains during the winter, especially in the Centre and Centre-South areas.

<b>Other countries</b>
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### **Bulgaria**

Better data is now available through associations and it is estimated that about 17 000 MT had been processed as of 18 August out of a 60 000 MT forecast. Factories are all stopped at the moment until Friday as there was a long gap in planting due to rains in the spring.

### **Hungary**

The harvest of processing tomatoes is now starting. The weather was quite good during the summer, but we have more rain than usual. If there is no more rain, the yield will be in accordance with the previous estimations.

# **OI POMODORO DA INDUSTRIA NORD ITALIA**

## **LA CAMPAGNA 2014 PROCEDE A RILENTO**

### **A CAUSA DEL CONTINUO SUSSEGUIRSI DI PIOGGE**

#### **NOTEVOLI GLI SFORZI PER GARANTIRE QUALITA' E QUANTITA' DEL PRODOTTO**

La campagna 2014 nel territorio dell'Oi Pomodoro da Industria Nord Italia sta procedendo a rilento a causa dell'andamento climatico e, in particolare, a causa delle continue e abbondanti piogge succedutesi per tutto il mese di luglio sino ad oggi. Nonostante fosse iniziata con i migliori auspici - con una contrattazione anticipata e con una programmazione delle superfici in risposta al fabbisogno delle imprese di trasformazione del territorio nonché con un buon clima nel periodo dei trapianti - la campagna 2014 ad oggi è contraddistinta da diverse difficoltà agronomiche che i produttori si trovano a fronteggiare in campo, al fine di garantire la raccolta di un prodotto di qualità nel rispetto della produzione integrata.

<Le Organizzazioni dei Produttori - spiega l'Oi - stanno operando in campagna per garantire le consegne alle imprese di trasformazione nei tempi programmati e nel rispetto dei contratti stipulati. Dagli incontri fra Organizzazioni di Produttori e imprese di trasformazione per il continuo monitoraggio dell'andamento di campagna, emerge una contrazione dei giorni di campagna con un probabile crollo delle consegne della seconda metà di settembre>.

Dal report settimanale sull'andamento della campagna elaborato dall'OI, spicca il dato del brix medio del territorio del Nord che, al 10 agosto, si attestava ad un valore di un brix di 4,61 a confronto del dato della media triennale nel medesimo periodo di 5,03. <Questo parametro - afferma l'Oi - si traduce in basse rese di trasformazione: a parità di materia prima consegnata si ottiene una minor quantità di prodotti finiti, in base ai dati odierni in calo anche del 10%. Le problematiche della campagna 2014 stanno comportando difficoltà sia al comparto della produzione che della trasformazione. Solo la stabilizzazione delle prossime condizioni meteo permetterebbe di limitare i consistenti danni causati, sin qui, dal generalizzato maltempo>.

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# CALIFORNIA TOMATO TONNAGE

Week ending August 16, 2014  
Report released August 18, 2014

To Members:

Following are the certified and paid for tonnage figures by county, as shown by certificates for week ending August 16, 2014.

<u>COUNTIES</u>	-----2014 TOMATO SEASON-----			
	2013 Accumulative Total to August 17	Previous Total to August 9	Receipts Wk Ending August 16	Accumulative Total to August 16
<b>Colusa</b>	371,424	341,336	71,671	413,007
<b>Contra Costa</b>	97,491	102,828	14,733	117,561
<b>Fresno</b>	2,659,849	2,322,746	392,580	2,715,326
<b>Glenn</b>	3,820	0	0	0
<b>Kern</b>	437,454	559,166	30,025	589,191
<b>Kings</b>	610,869	776,907	112,567	889,474
<b>Madera</b>	61,413	97,133	12,472	109,606
<b>Merced</b>	79,716	98,578	93,527	192,105
<b>Sacramento</b>	0	0	0	0
<b>San Benito</b>	0	0	1,081	1,081
<b>San Joaquin</b>	7,041	3,123	13,182	16,305
<b>Solano</b>	55,490	58,196	37,417	95,613
<b>Stanislaus</b>	29,020	15,797	11,991	27,788
<b>Sutter</b>	81,826	43,230	30,054	73,284
<b>Tulare</b>	203	5,369	0	5,369
<b>Yolo</b>	578,873	421,539	200,085	621,624
<b>Statewide Totals</b>	<b>5,074,489</b>	<b>4,845,948</b>	<b>1,021,385</b>	<b>5,867,334</b>

Weekly tonnage for week ending August 17, 2013 was 1,015,055.

Projected tons for week ending August 23, 2014 is 1,068,000.

Information provided by the California Processing Tomato Advisory Board.

2014 California Tomato Tonnage

