

WPTC CROP UPDATE AS OF 5 FEBRUARY 2025

AMITOM COUNTRIES

There is no change to the forecast released following AMITOM's meeting on 17 January (see 20 January report). The total estimate is currently very close to 2024 final production with a total of **17.15 million tonnes** expected.

In **EGYPT**, the total forecast for 2025 remains **780,000 tonnes**. It is now the peak of the winter crop which will last till next April, while transplanting for the summer crop should start within few days and shall last till May while harvesting will start in the earlier transplanted areas. Price is about 130 USD/t (120 EUR/t) delivered to factories. There is no issue with water availability either from the underground or from the Nile River.

In **IRAN**, tomato paste production saw a sharp 30% decline in 2024 compared to 2023. However, forecasts suggest an improvement in 2025, with production expected to reach **2 million tonnes**. That said, it remains too early to make definitive predictions, as further updates on volumes will become available in the coming months. Additionally, the currency situation remains highly uncertain, especially with Mr. Trump's return to the political scene and the potential impact of his policies on Iran. This could significantly influence Iran's currency market, which in turn would affect tomato processing and export dynamics. Overall, the outlook remains uncertain, and we will continue to monitor the situation and provide further updates in the weeks and months ahead.

In **FRANCE**, a first estimate is **180,000 tonnes**, but it is still too early to confirm this number.

In **PORTUGAL**, nothing is settled but processors are targeting a reduction from just over 1.5 million tonnes in 2024 to **1.4 million tonnes or less**. Negotiations are planned next week.

In **SPAIN**, there is no official figure, but a significant reduction is expected in 2025, from nearly 3.1 million tonnes in 2024 to **2.4 million tonnes**.

NORTHERN HEMISPHERE COUNTRIES

In **CANADA**, production was down in 2024 and should increase slightly in 2025 with an early estimate of 575,000 short tons or **520 000 tonnes**, but negotiations are starting now.

In **CALIFORNIA**, there should be a reduction of surfaces planted of 14% to 200,000 acres (81,000 ha) from 228,000 acres (92,000 ha) planted in 2024, resulting in a January estimate of **9.25 million metric tonnes** (10.2 million short tons), down from 10.25 million metric tonnes (11.3 million short tons) in January 2024. The volume forecast is however very optimistic as it is based on an average yield of 51 t/acre, which was only reached in 2023, while the average yield is closer to 48 t/acre.

In **CHINA**, the crop forecast for 2025 is **6 million tonnes**, down from 10.45 million tonnes in 2024. Due to the low price in 2024, growers' willingness to plant is low in 2025.

In **JAPAN**, the expected surfaces (to be) planted is 430 ha for a total volume of tomatoes to be processed of **26,000 tonnes**. Planted area is on the decline as growers are aging and an increasing number of people are leaving farming. Although efforts are being made to continually recruit new farmers, it is difficult to expand the planted area, so processors are focusing on increasing harvest volumes.

SOUTHERN HEMISPHERE COUNTRIES

In **AUSTRALIA**, the initial forecast was 215,000 tonnes but it is now reduced to **202,000 tonnes**. Harvest started on 28 January with most growers starting this week. After a few early issues with some rain and waterlogging of some fields, conditions have been mostly good and dry to date, although there were some rains in the last couple of days. The outlook looks dry. New technology such as spraying from drones enable to react quickly. An average yield of 00 t/ha is expected.

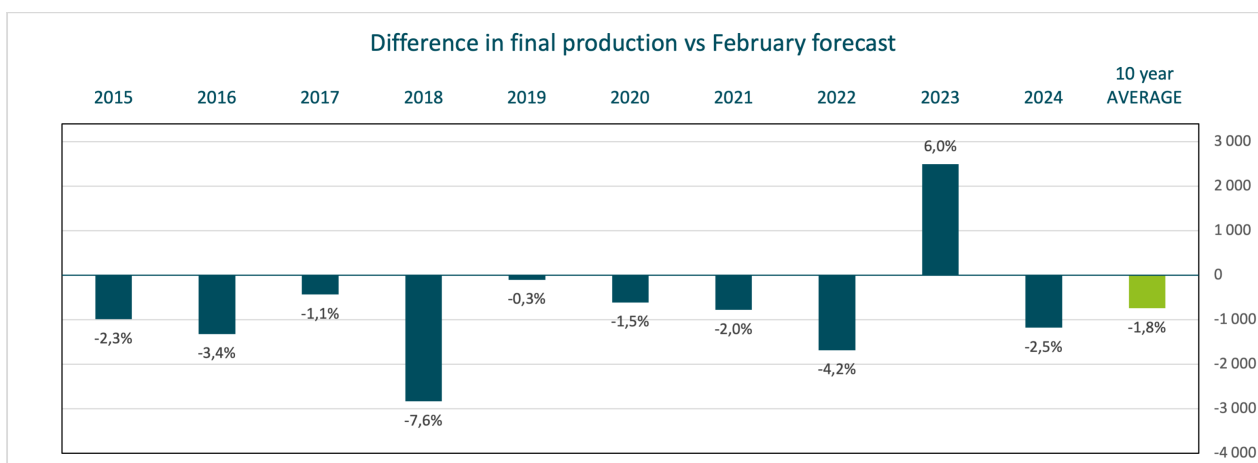
In **CHILE**, there is no change to the crop forecast of **1,39 million tonnes**, with a yield forecast of 100 t/ha. The harvest started on 16 January, but it is not yet at full speed, and it is a slow start.

In **PERU**, the weather is good, and the forecast remains **150,000 tonnes**.

In **SOUTH AFRICA**, a **160,000 tonnes** harvest remains planned for the 2025 season. The summer production areas started harvesting from Mid- January and will continue until mid- May. The projected summer volumes are still on schedule. The winter production areas currently are still transplanting, the planting schedule were disrupted by heavy sub-tropical rainfall, but the plantings recover and are back to schedule for a harvesting period from April till September 2025.

The **WPTC global world production** estimate for 2025 stands at **40.5 million tonnes**. Although it is 11.5% lower than 2024 production of 45.8 million tonnes, it is felt that it is still not a high enough reduction of volumes in view of the current level of stocks and demand.

On average over the last ten years, the final production volume was 1.8% lower than the WPTC February estimate, with production higher than the early forecast only once over the period.



		2023 FINAL	2024 FINAL	2025 FORECAST	AVERAGE 2022-2024	VARIATION 2025 vs 2024	
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	37 Mem.	60 Mem.	40 Mem.	46	-33,3%
		Egypt	600 Mem.	624 Mem.	780 Mem.	560	25,0%
		France	160 Mem.	168 Mem.	180 Mem.	157	7,1%
		Greece	390 Mem.	510 Mem.	450 Mem.	413	-11,8%
		Hungary**	110 Mem.	120 Mem.	75 Mem.	103	-37,5%
		Iran**	2 000 Mem.	1 400 Mem.	2 000 Mem.	1 733	42,9%
		Israel	197 Mem.	184 Mem.	180 Mem.	177	-2,2%
		Italy	5 404 Mem.	5 272 Mem.	5 600 Mem.	5 384	6,2%
		Malta**	6 Mem.	7 Est.	7 Est.	6	0,0%
		Portugal***	1 500 Mem.	1 500 Mem.	1 400 Mem.	1 471	-6,7%
		Spain***	2 600 Mem.	3 080 Mem.	2 400 Mem.	2 602	-22,1%
		Syria**	40 Est.	40 Est.	40 Est.	40	0,0%
		Tunisia	826 Mem.	999 Mem.	850 Est.	831	-14,9%
		Turkey	2 700 Mem.	2 700 Mem.	2 600 Mem.	2 583	-3,7%
Ukraine**	500 Mem.	550 Mem.	550 Est.	390	0,0%		
Subtotal AMITOM		17 070	17 214	17 152	16 497	-0,4%	
of which members in EU		10 207	10 717	10 152	10 182	-5,3%	
OTHER MEMBERS	Brazil	1 571 Mem.	1 650 Mem.	1 600 Est.	1 618	-3,0%	
	Canada	520 Mem.	493 Mem.	520 Mem.	520	5,5%	
	California	11 556 Mem.	9 999 Mem.	9 250 Mem.	10 356	-7,5%	
	China	8 000 Mem.	10 450 Mem.	6 000 Mem.	8 217	-42,6%	
	Japan	26 Mem.	26 Mem.	26 Mem.	26	0,0%	
	Subtotal Other Members	21 673	22 618	17 396	20 737	-23,1%	
NON MEMBERS	Algeria*	1 350 Misc.	1 300 Misc.	1 300 Est.	1 283	0,0%	
	Czech Republic	25 Est.	25 Est.	25 Est.	25	0,0%	
	Morocco*	100 Est.	100 Est.	100 Est.	100	0,0%	
	Poland	250 Misc.	400 Misc.	400 Est.	275	0,0%	
	Russia*	660 Misc.	670 Misc.	650 Est.	656	-3,0%	
	Slovakia	20 Est.	20 Est.	20 Est.	20	0,0%	
	USA excluding California	475 Misc.	475 Misc.	475 Est.	467	0,0%	
	Subtotal Non Members	2 880	2 990	2 970	2 826	-0,7%	
Total Northern Hemisphere		41 623	42 822	37 518	40 060	-12,4%	
SOUTHERN HEMISPHERE	MEMBERS	Argentina	586 Mem.	630 Mem.	560 Mem.	614	-11,1%
		Australia	110 Mem.	211 Mem.	202 Mem.	183	-4,3%
		Chile	1 150 Mem.	1 300 Mem.	1 390 Mem.	1 140	6,9%
		Peru	150 Mem.	150 Mem.	150 Mem.	142	0,0%
		South Africa	160 Mem.	140 Mem.	160 Mem.	140	14,3%
		Subtotal members	2 156	2 431	2 462	2 219	1,3%
	NON MEMBERS	Dominican Republic	227 Est.	227 Est.	227 Est.	227	0,0%
		India	162 Est.	162 Est.	162 Est.	162	0,0%
		Mexico	40 Est.	40 Est.	40 Est.	40	0,0%
		New Zealand	25 Misc.	39 Misc.	40 Misc.	39	2,6%
		Senegal	73 Est.	73 Est.	73 Est.	73	0,0%
Thailand		40 Est.	40 Est.	40 Est.	40	0,0%	
Venezuela	24 Misc.	14 Misc.	14 Est.	19	0,0%		
Subtotal non members	591	595	596	600	0,2%		
Total Southern Hemisphere		2 747	3 026	3 058	2 819	1,1%	
GENERAL TOTAL		44 370	45 848	40 576	42 879	-11,5%	
of which members of the WPTC		40 899	42 263	37 010	39 453	-12,4%	
WPTC as percentage of total production		92%	92%	91%	92%	108,1%	

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

* Previously an AMITOM member ** AMITOM associate members *** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:
WPTC does not guarantee or assume any liability for the accuracy of the contents of this report and shall not be responsible for any losses sustained as a result of relying on the contained information.