WORLD PROCESSING TOMATO COUNCIL

WPTC Crop update as of 31st March 2008

AMITOM countries:

Greece:
The final national regulations concerning how decoupling will be applied and periods used for reference have not yet been published. They are expected in the next few days. Consequently, contracts have not yet been signed. Current indication of 700 000 tonnes to be processed in 2008, more than last year but the increase is due to an expected increase in yield and not increased surfaces (which were c. 10 000 hectares in 2007). Price should be in the order of 80 euros/tonne delivered.

Italy:
North (AIIPA): Contracting is now closing as official final date was 15 March. The reference price negotiated for the north of Italy is 79.5 euros/tonne ex-field + 1 euro/tonne for the PO services. Transport costs are on average 10-12 euros/tonne. The quantity expected for AIIPA companies is similar to last year.
The Italian regulations have already been published, with a different minimum yield per hectare set in each region, depending on historic production. Coupled aid will be around 1300 euros/ha.
There has been limited rain in the last two months and growers hope for some more but the water situation is quite normal. Transplanting will start at the beginning of April.

South (ANICAV): Contracting is still ongoing but the price of round tomatoes (paste) will be around 85-90 euros/tonne ex-field and of long tomatoes (wholepeel) 100-110 euros/tonne which is very high. The surface planted should be similar to last year. The water situation is getting better with some rains lately, but still drier than normal.

The total production in Italy should be 4.7 million tonnes. Surface planted in 2007 was 61 000-62 000 hectares.

France:
The contracts have not yet all been signed. Average price should be 70 euros/tonne ex-field, with 10-15 euros/tonne for transport (sometimes more). The volume expected is around 120 000 tonnes for a surface of 1600 hectares. Transplanting will begin early April and continue until 10 June. General conditions are good, despite a lack of rain.
The expected coupled subsidy per hectare is c. 2 500 euros/hectare

Portugal:
The contracts have not yet been all signed as the national legislation has not been published which makes negotiations difficult. The expected subsidy is 1 250 euros/tonne.
The total crop should be slightly lower than last year at about 1 million tonnes processed in Portugal. The price should be just under 80 euros/tonne delivered for 5.4 ° brix.
Surface planted in 2007 was slightly above 40 000 hectares.

Spain:
The estimated total production for 2008 is 1.8-1.85 million tonnes, for a total surface of 24 500 to 25 000 hectares, which would mean a coupled subsidy of c. 1 100 euros/hectare (government figure, confirmed by AGRUCON estimates).

The contract price is c. 75 euros/tonne ex-field in Extremadura, with a cost of transport of 5-6 euro/tonne. There have been little rain this winter but water availability is not a problem in this region.
Discussions are still ongoing in the Ebro valley with prices expected close to 80 euros/tonne + higher transport costs than in Extremadura. There is a serious lack of water.
In Andalusia, production forecast has been reduced due to the limited water availability, and negotiations are still ongoing with prices not clear yet (60 to 72 euros/tonne?).

Tunisia:
Contracts are ongoing with an indication that prices should go up slightly (they were equivalent to 58 euros/tonne ex-field + c. 5 euros/tonne transport last year). Production should be similar to last year, with 600 000 tonnes expected.

Turkey:
Contracting is continuing and surfaces planted should be 20-25% higher than last year as conditions are good to 35 000 hectares. Production will depend on the yield as they vary greatly depending on weather conditions but 2.1 million tonnes is expected. Price of 70-72 euros/tonne ex-field + 15% for transport.
No stocks should remain at the end of the season.

Currently, the total forecast for all AMITOM countries (10 member countries + 5 Associate members) stands at 14.38 million tonnes, of which 8.37 million tonnes for the 5 EU countries.

Other WPTC countries:

- **Canada**

The 2008 forecast stands at 520,000 metric tonnes. Prices reduced by 2% from 2007 (driven by changes in currency exchange rates). Planting scheduled to begin in early May.

- **California**

For CTGA, the contract intentions appears overly optimistic in terms of contracted acres. Feedback from growers, seed companies and processors indicate a 10% acreage reduction. If you use a 40 ton yield and 265000 acres production would be 10.6 million short tons. CTGA is surveying growers and will have a firmer number in April.
Until this number is available, the official forecast remains the CASS January figure of 11.8 million short tons (10.7 million metric tonnes).

- **China**

According to the latest information received by TunHe, some small companies including foreign ones set up factories or add new lines in Xinjiang. They estimate the production will increase to 5.6 million metric tonnes. They also got information from China customs the low brix small packaged or canned tomato exporting was up to 180,000 metric tonnes in 2007, much higher than that of 2006 (they cannot get exact figure for small packages).

- **South Africa**

The harvest should be about 150 000 tonnes. The crop in the South is currently half way while the harvesting of the crop in the North will start in April. Weather conditions are currently good and enough irrigation water is available. The price for tomatoes is between 80 & 105 USD (exchange of the Rand at R8/USD).

- **Australia**

The final tonnes for Australian could be around 136,000 tonnes

- **Argentina**

Argentina forecast for this season will be 350 000 tonnes because of rains during harvest time in Mendoza region.

- **Chile**

	2007 FINAL	2008 FORECAST
Volume of fresh tomatoes processed (MT)	670.000	510.000
Volume of tomato paste produced (MT)	109.000	83.000
Surface planted (ha)	8.900	6.800
Average field yield (MT/ha)	75,3	75,0
Field-gate price paid by processors for fresh tomatoes used for paste (currency: Chilean $ actual exchange rate: $470 per US$)	Min: $30.000/MT Max: $34.000/MT Average:	Min: $34.000/MT Max: $38.000/MT Average:
Start of the harvest (date)	29/01/07	31/01/08
End of the harvest (date)	15/04/07	10/04/08

Weather conditions:
Still warm and dry, which has allowed continuing the harvest without major issues.

Other comments:
Yields especially on the 2nd half of the season have been affected due reduced water availability.

Other countries:

- **Poland**

The current forecast is 190 000 tonnes, of which 177 000 tonnes for paste production. A surface of c. 4000 ha will be planted. Average contract price is 85 euros/tonne. Poland went for full decoupling of the aid.

- **Brazil**

Hectareage and Production Estimates for Brazilian processing tomato for the 2008 season:

State	Area (ha)	Production (t)*
Goiás	13.857	1.177.845 t
São Paulo	2.380	178.500 t
Norte de Minas Gerais	670	56.950 t
Total	**16.897**	**1.413.295 t**

Sophie Colvine
31 March 2008

WORLD PROCESSING TOMATO COUNCIL

Date of last update: 31/03/2008

all figures in 1000 metric tonnes

Hemisphere	Group	Country	2006 FINAL	2007 FINAL	2008 FORECAST 5 FEB 2008	2008 FORECAST ONGOING	AVERAGE 2005 to 2007
NORTHERN HEMISPHERE*	MEMBERS IN MEDITERRANEAN REGION (AMITOM)	Algeria**	180	300	300	300	210
		France	120	99	100	120	125
		Greece	710	640	600	700	743
		Iran**	1 800	2 100	2 300	2 300	2 008
		Israel	186	225	220	200	213
		Italy	4 400	4 600	4 700	4 700	4 767
		Jordan	-	-	-	-	13
		Malta**	11	9	11	11	9
		Morocco	120	140	150	150	137
		Portugal***	900	1 030	1 000	1 000	977
		Spain***	1 580	1 750	1 900	1 850	2 060
		Syria**	165	70	150	150	115
		Tunisia	463	580	580	600	593
		Turkey	1 450	1 650	2 000	2 100	1 575
		Ukraine**	250	85	200	200	162
		Subtotal Mediterranean Region	**12 335**	**13 278**	**14 211**	**14 381**	**13 707**
	MEMBERS IN NORTH AMERICA	California	9 072	10 950	10 703	10 703	9 576
		Canada	571	563	546	520	575
		Subtotal North America	**9 643**	**11 513**	**11 249**	**11 223**	**10 151**
	MEMBERS IN ASIA	China	4 300	4 600	5 100	5 600	4 033
		Japan	40	43	43	43	42
		Subtotal Asia	**4 340**	**4 643**	**5 143**	**5 643**	**4 076**
		Subtotal WPTC members	**26 318**	**29 434**	**30 603**	**31 247**	**27 933**
	NON MEMBERS	Bulgaria	140	140	150	150	177
		Hungary	102	115	100	100	96
		Poland	220	205	200	190	213
		Czech Republic	12	15	15	15	13
		Slovakia	26	30	30	30	27
		Other US States (exc. California)	461	524	500	500	512
		Subtotal non-members	**961**	**1 029**	**995**	**985**	**1 037**
		Total Northen Hemisphere	**27 279**	**30 463**	**31 598**	**32 232**	**28 970**

Hemisphere	Group	Country	2006 FINAL	2007 FINAL	2008 FORECAST 5 FEB 2008	2008 FORECAST ONGOING	AVERAGE 2005 to 2007
SOUTHERN HEMISPHERE*	MEMBERS	Argentina	290	340	390	390	330
		Australia	291	229	200	136	279
		Chile	619	670	525	510	682
		South Africa	149	160	160	150	156
		Subtotal WPTC members	**1 349**	**1 399**	**1 275**	**1 186**	**1 447**
	NON MEMBERS	Brazil	1 160	1 291	1 300	1 413	1 232
		India	145	120	150	130	137
		Mexico	24	17	20	20	21
		New Zealand	65	70	70	70	66
		Peru	45	70	70	70	52
		Senegal	76	52	87	87	69
		Taiwan	20	20	20	20	20
		Thailand	260	260	260	260	260
		Venezuela	40	40	40	40	40
		Subtotal non-members	**1 835**	**1 940**	**2 017**	**2 110**	**1 897**
		Total Southen Hemisphere	**3 184**	**3 339**	**3 292**	**3 296**	**3 344**
GENERAL TOTAL			**30 462**	**33 802**	**34 890**	**35 528**	**32 314**
of which members of the WPTC			27 666	30 833	31 878	32 433	29 380
			90,8%	91,2%	91,4%	91,3%	90,9%

all figures in 1000 metric tonnes

in pink: estimate, no recent information on the country tion on the country

*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