

The global tomato processing industry in 2017



2017 World production

(x .000 ton)

	2015 FINAL	2016 FINAL	FORECAST 1/06/2017	2017 FINAL	VARIATION 2017 vs 2016	AVERAGE 2014 - 2016	VARIATION 2017 vs average
California	13.025	11.470	10.700	9.520	-17,0%	12.401	-26,9%
China	5.600	5.150	5.500	5.940	15,3%	5.683	4,7%
Italy	5.393	5.180	5.000	5.260	1,5%	5.162	2,0%
Spain	3.028	2.950	3.200	3.300	11,9%	2.893	12,7%
Turkey	2.700	2.100	2.000	1.900	-9,5%	2.200	-15,0%
Portugal	1.660	1.507	1.650	1.554	3,1%	1.455	6,0%
Brazil	1.300	1.450	1.400	1.450	0,0%	1.383	4,8%
Iran	1.350	1.150	1.500	1.000	-13,0%	1.567	-37,8%
Chile	850	800	1.080	1.080	35,0%	820	24,1%
Ukraine	550	550	650	650	18,2%	523	19,5%
Tunisia	935	650	650	643	-1,1%	768	-19,3%
Algeria	500	550	500	600	9,1%	497	20,7%
Argentina	535	405	488	450	11,1%	444	1,3%
Canada	386	456	450	430	-5,7%	393	8,2%
USA excluding	350	476	450	408	-14,3%	455	-10,5%
Greece	500	440	460	400	-9,1%	470	-15,2%
Russia	90	145	400	400	175,9%	106	73,5%
Others	2.712	2.788	2.794	2.970	6,5%	2.670	10,7%
WORLD	41.374	38.072	38.472	37.555	-1,4%	39.784	-5,8%
Iberian peninsula	4.688	4.457	4.850	4.854	8.9%	4.347	10.4%

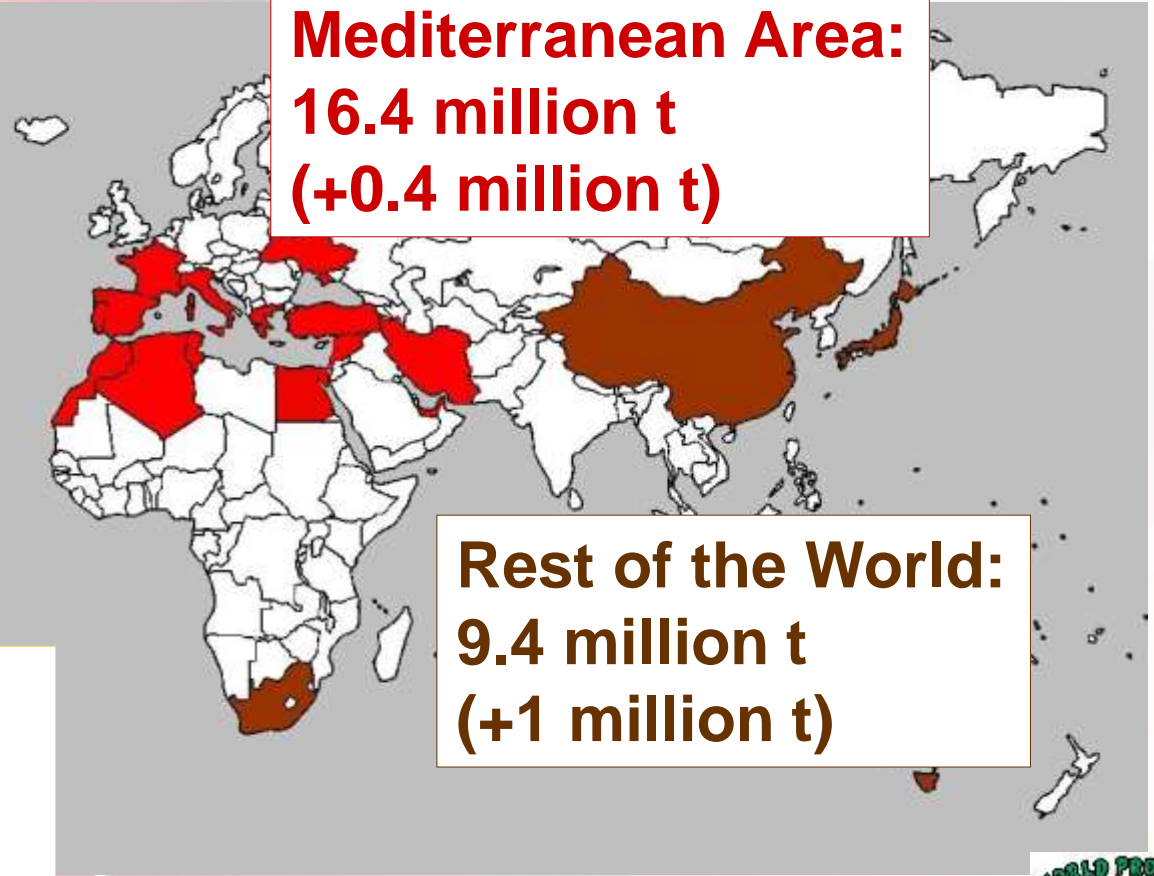
2017 production: 37.5 million tonnes
- 0.6 million tonnes/2016
- 1 million tonnes from June forecast

North America:
9.9 million t
(-2 million t)

Mediterranean Area:
16.4 million t
(+0.4 million t)

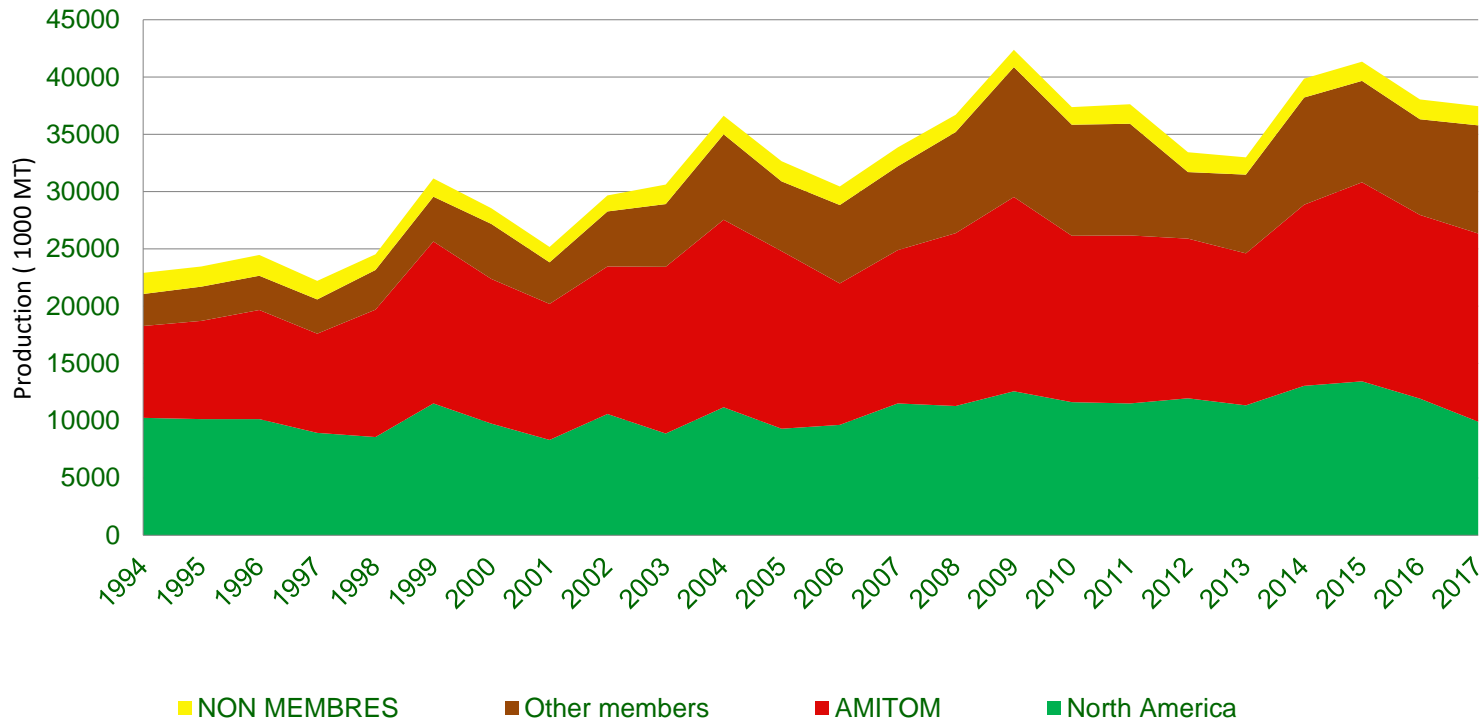
Rest of the World:
9.4 million t
(+1 million t)

Non members:
1.7 million t
(stable)



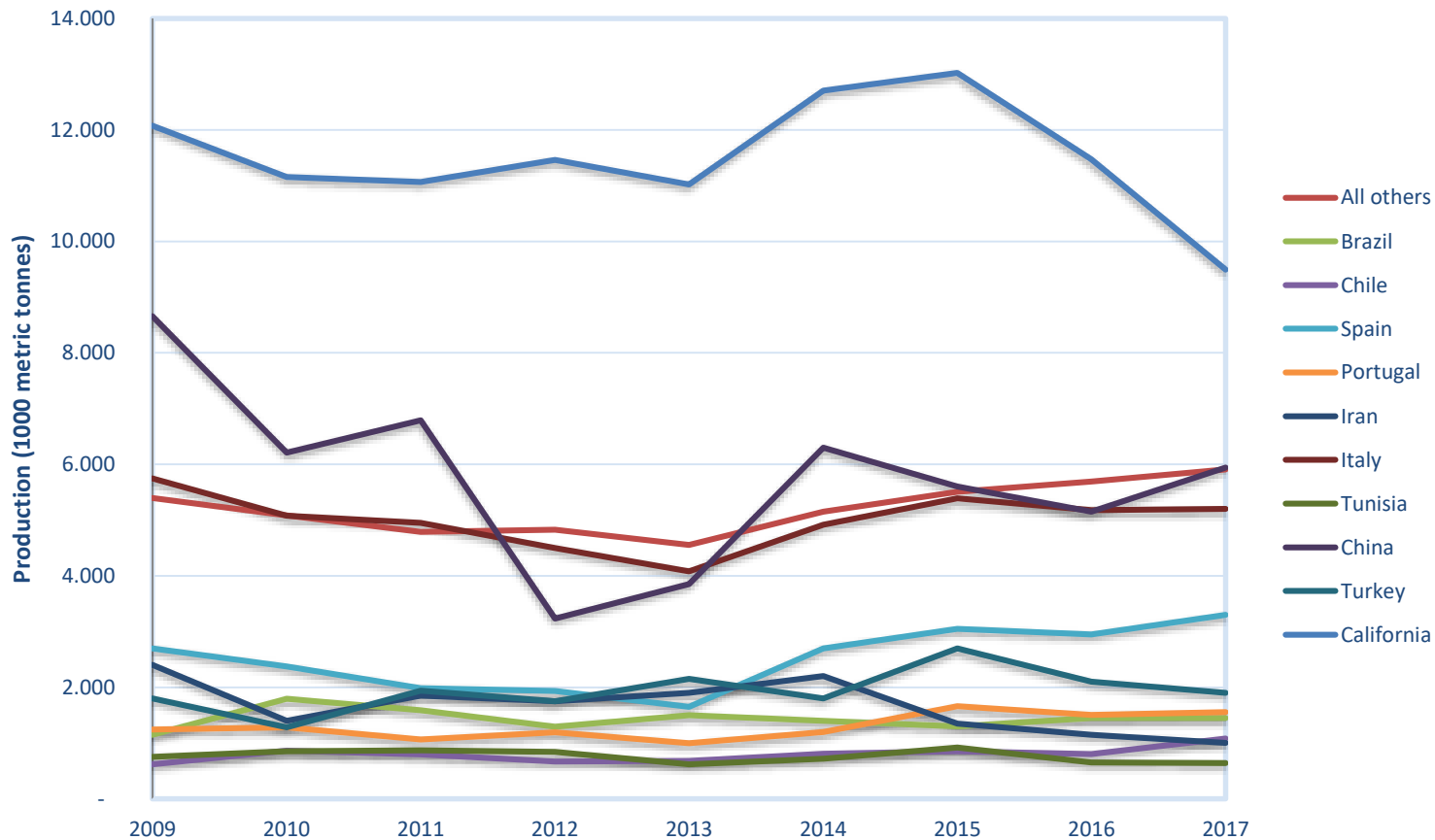
2017 production: 37.5 million tonnes -1.6% on 2016

World production 1994-2017



2009-2017 production in top 10 countries

Evolution of production in the top 10 countries



AMITOM (EU)

France: Production stable at 195 000 t

Portugal: stable at 1.5 million t

Greece: Wet spring reduced production to 400 000 t

Spain: above target at 3.3 million t despite early worries to to extreme heat

Italy: stable at 5.2 million t but low processing yields



AMITOM (non EU)



Russia: production increased to 400 000 t

Ukraine: on target at 650 000 t

Turkey: reduced to 1.9 million t

Iran: reduced to 1 million t

Tunisia: stable at 643 000 t

China

- Production up from 5.15 million tonnes to 5.94 (+15%)
- Production of paste estimated at 750,000 to 800,000 tonnes
- Some factories closed due to environmental regulations



Southern Hemisphere

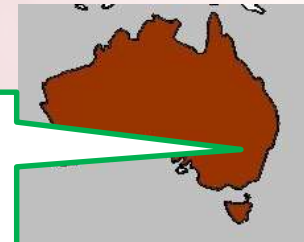
Brazil: Stable at 1.45 million t
in 2017



Chile:
Up to 1.080 000 t in 2017
Plan 1.1 million in 2017

Argentina:
405 000 t in 2016
Plan 450 000 t in 2017

Australia:
Down to 185 000 t in 2017
Plan 280 000 t in 2018



2017 Tonnage

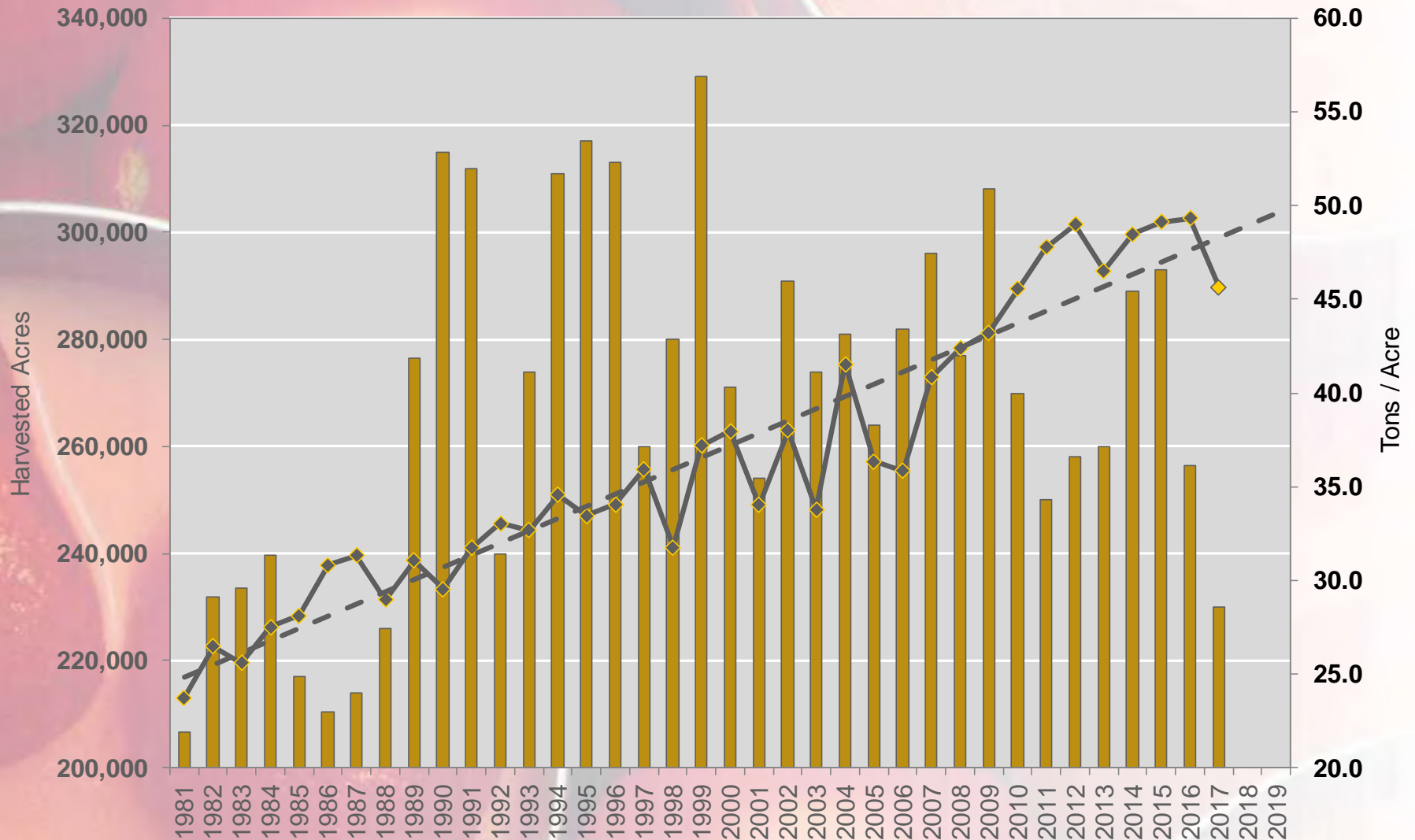
2017	10,463,553
2016	12,646,979
2015	14,361,188
2014	14,009,982
2013	12,113,017
2012	12,636,019

Organic Tonnage

2017	432,954
2016	736,816
2015	469,858
2014	370,726
2013	283,944
2012	315,685
2011	289,105
2010	239,000

California Processing Tomato Harvest

Harvested Acres & Yield (Tons / Acre): 1981 - 2017



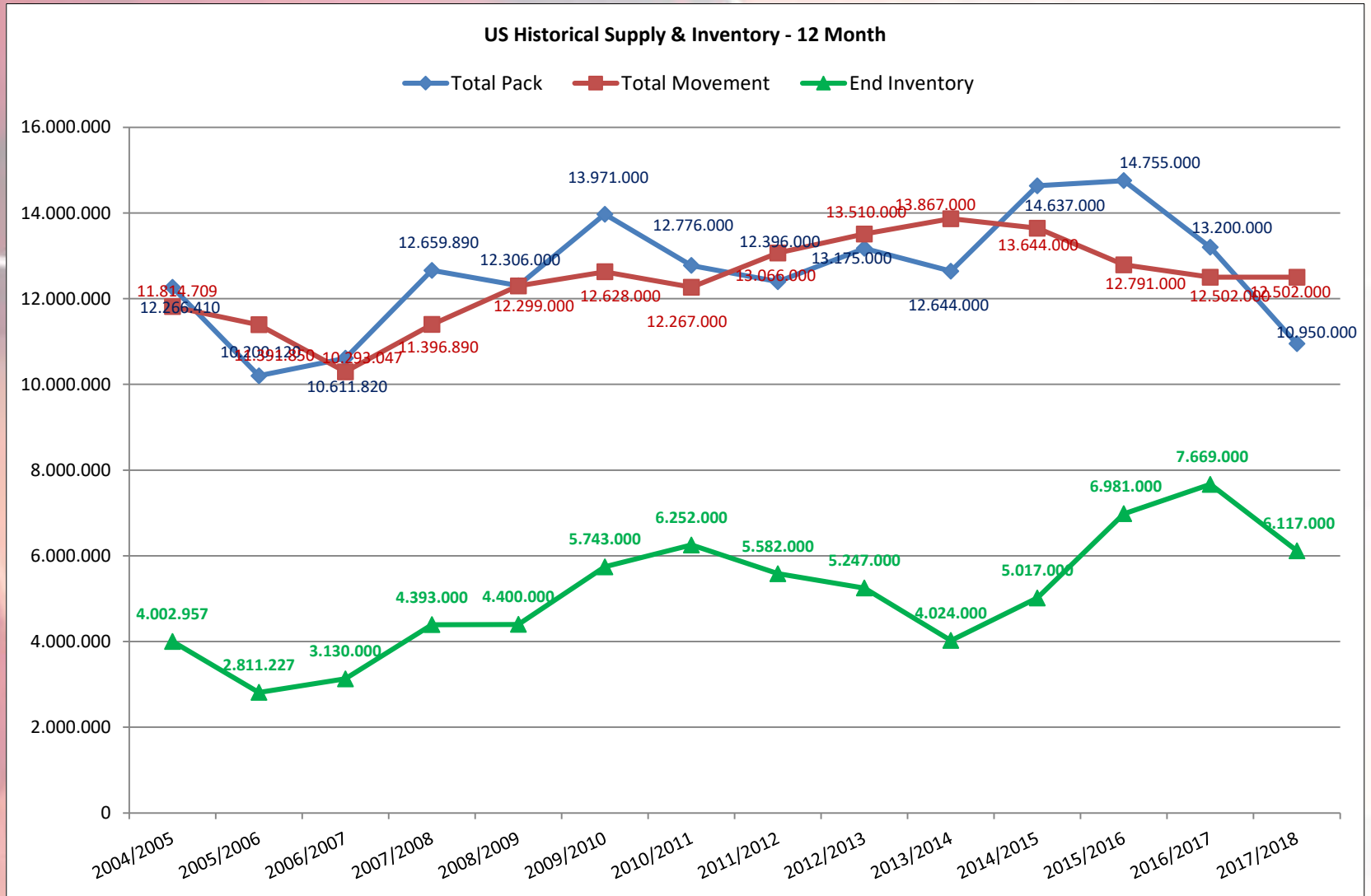
PTAB Grading Averages

2007- 2017

Year	Total Tons (millions)	% Mold	% Green	% MOT	% LU	Hue	Color	% Brix	pH
2017	10.46	2.0	1.8	0.7	1.4	20.1	24.9	5.26	4.45
2016	12.65	1.1	2.0	0.8	1.5	20.0	24.7	5.37	4.38
2015	14.36	1.3	2.0	0.8	1.3	20.0	24.8	5.25	4.37
2014	14.00	1.2	2.0	0.8	1.4	19.9	24.3	5.15	4.36
2013	12.11	1.5	2.1	0.7	1.3	19.9	24.5	5.23	4.37
2012	12.64	1.2	1.5	0.7	1.3	19.9	24.3	5.16	4.36
2011	11.94	1.9	1.4	0.7	1.2	19.8	24.2	5.26	4.43
2010	12.29	1.6	1.6	0.6	1.3	20.1	24.9	5.34	4.42
2009	13.31	1.4	1.1	0.6	1.6	20.1	25.1	5.37	4.44
2008	11.82	1.4	1.1	0.4	1.6	20.0	24.5	5.29	4.43
2007	12.08	2.0	1.0	0.5	1.7	19.8	24.1	5.25	4.42



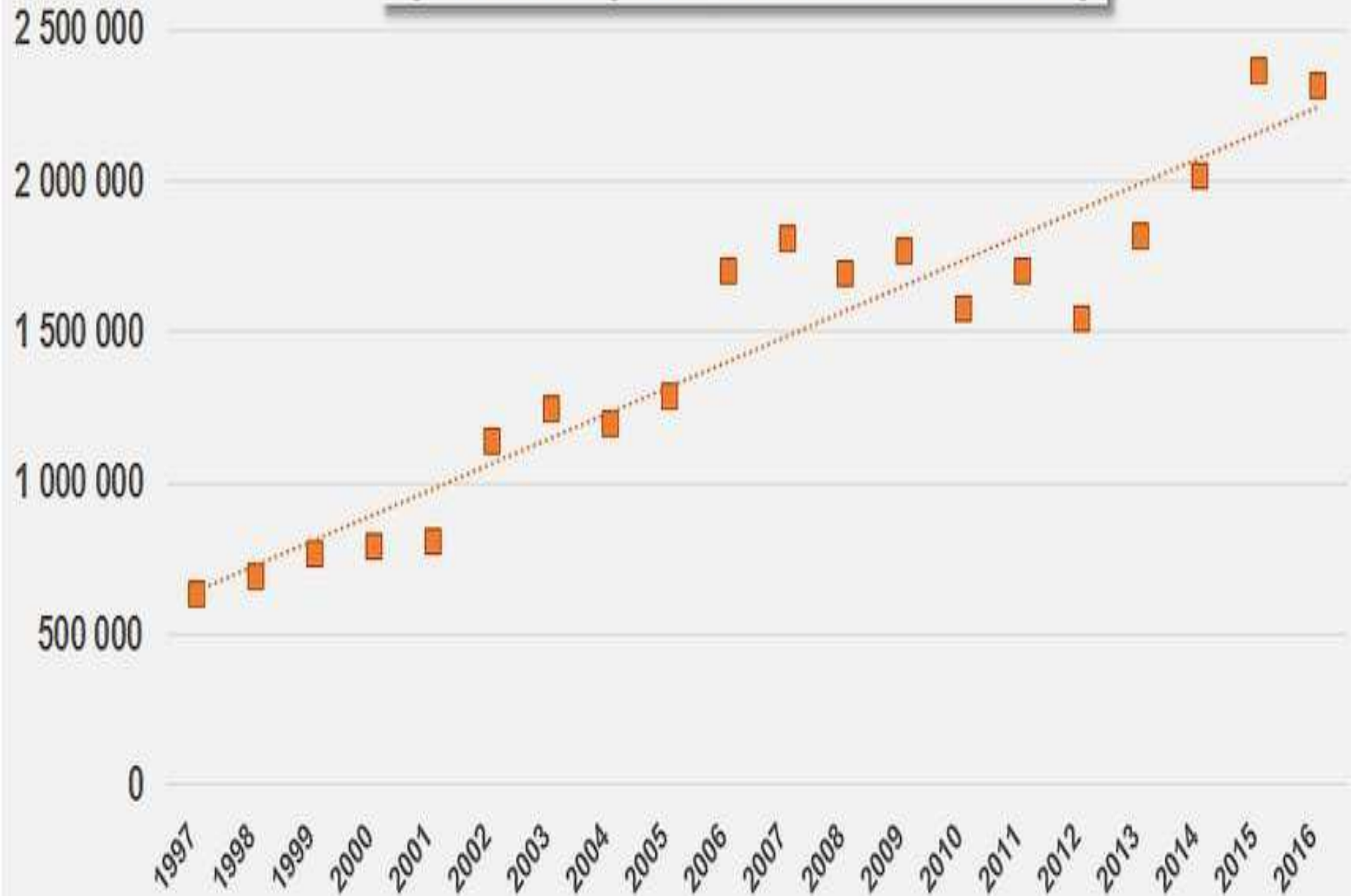
US Historical Supply & Inventory



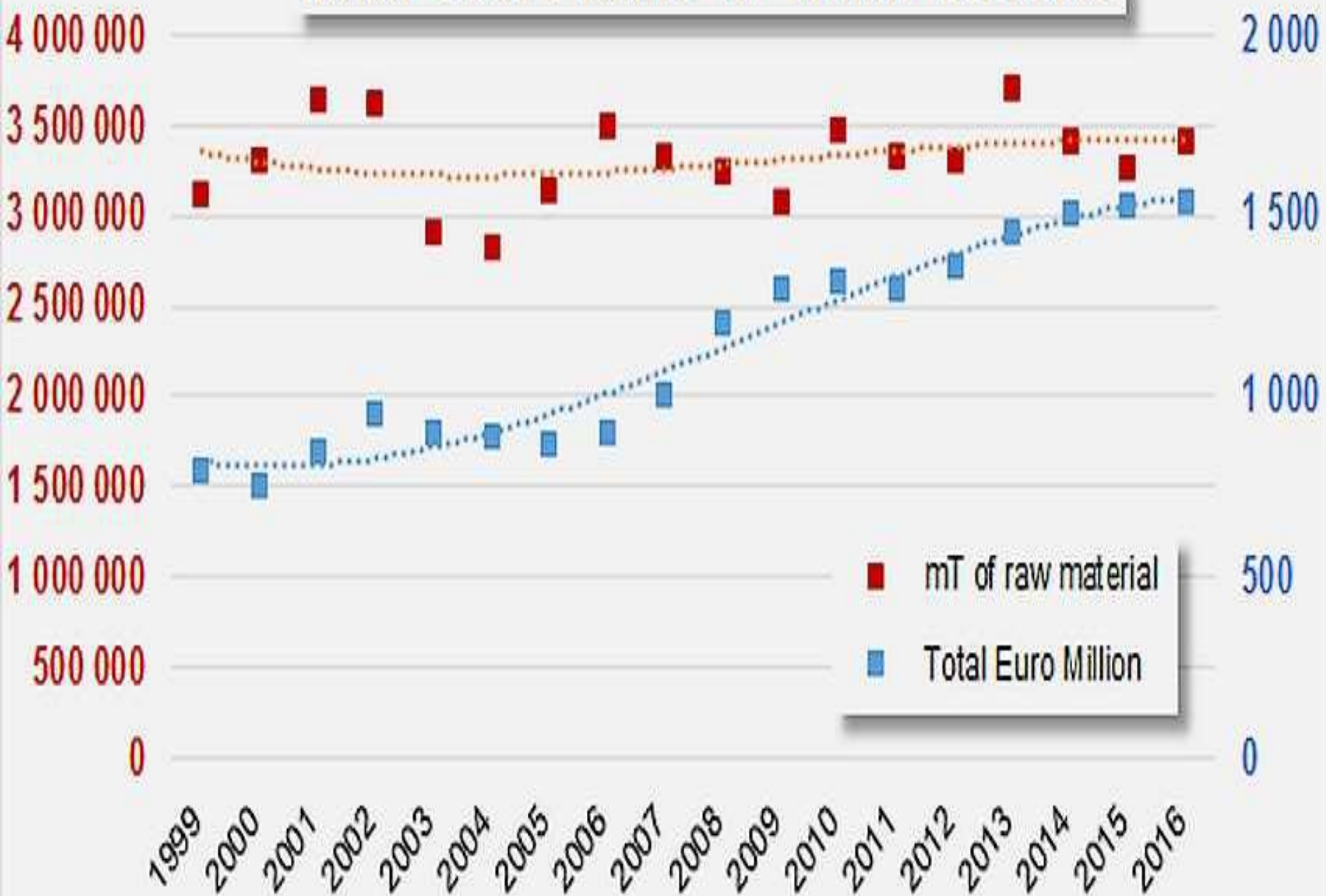
Annual Levels of Price for Raw Material (USD/mT)

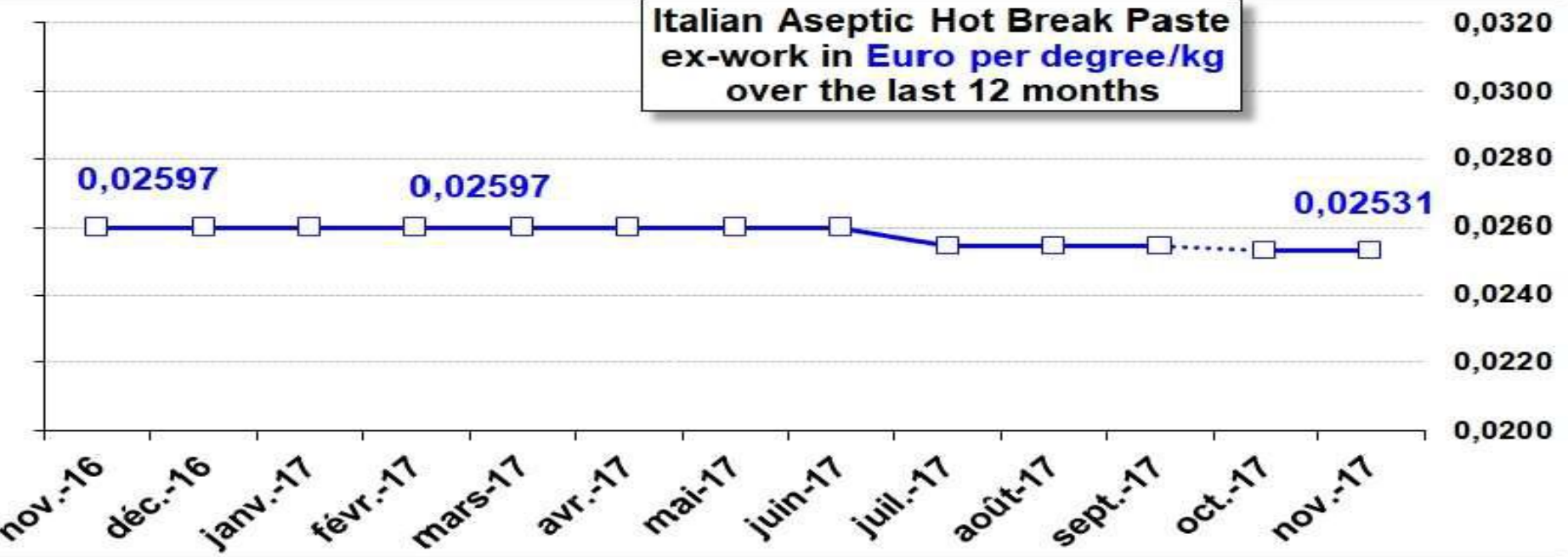
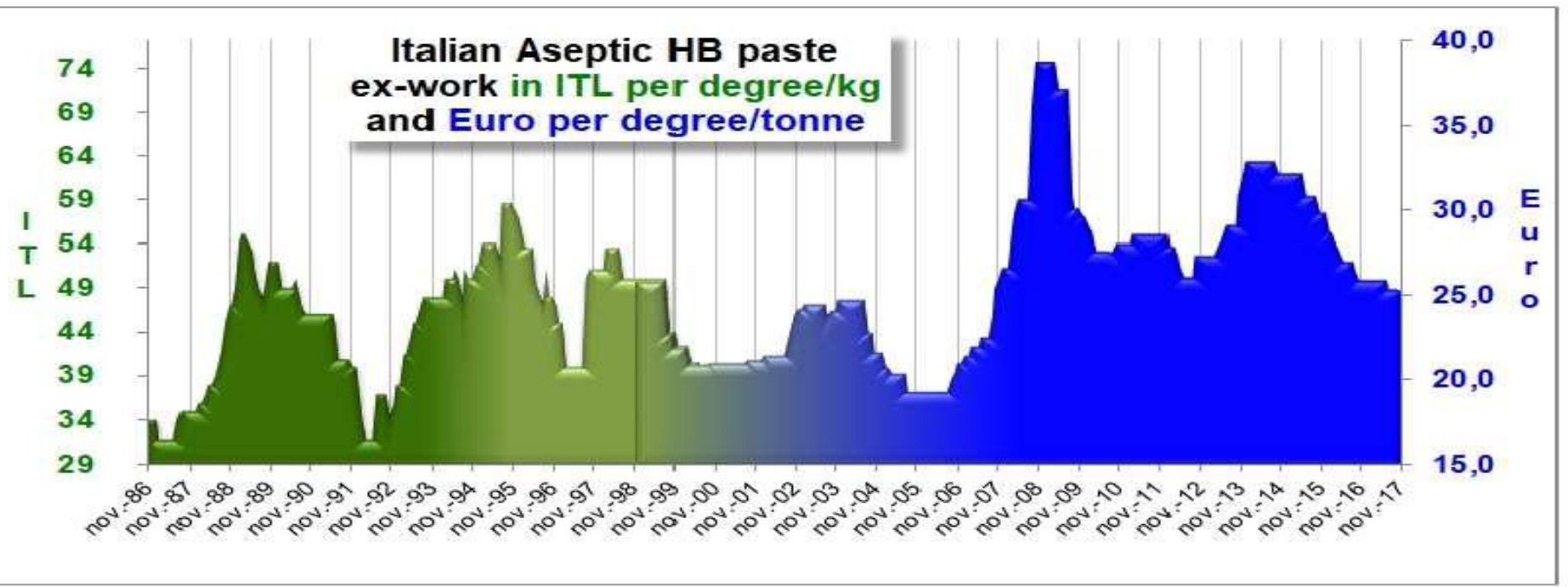


Spanish Exports, in mT Raw Mat Eq.



Italian Trade Balance for Tomato Products

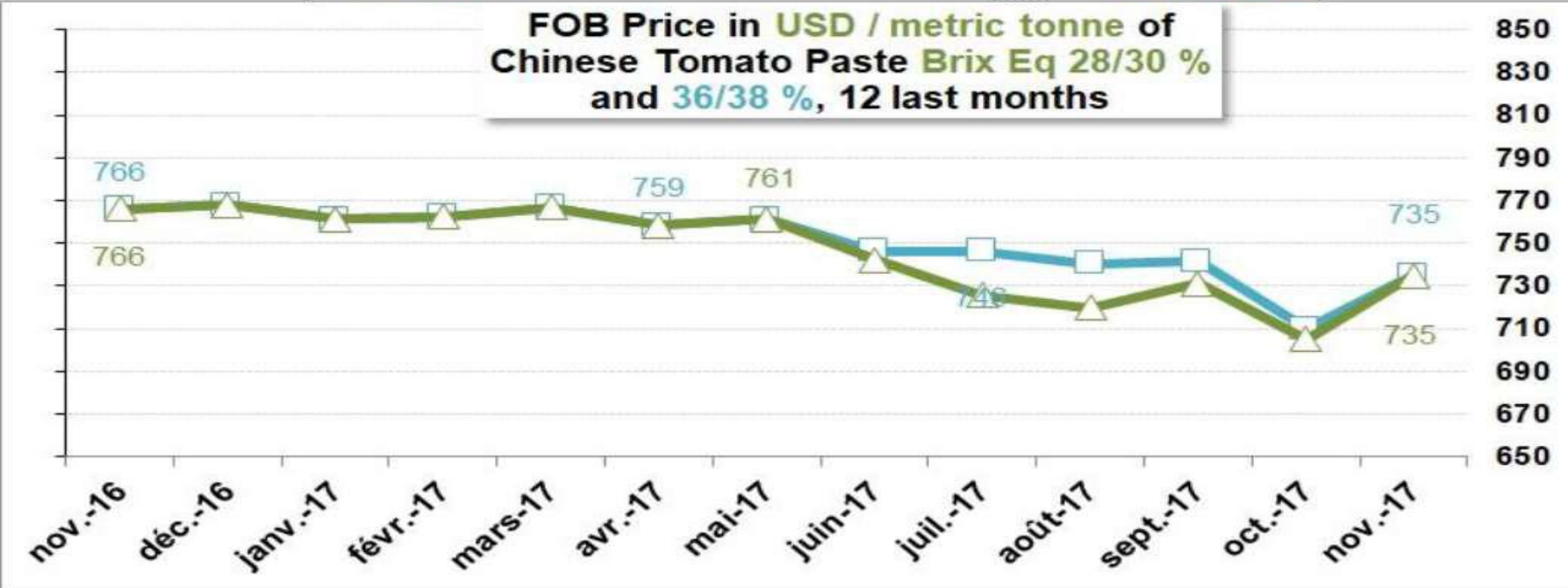




nov-17 exchange rate : 1 US\$  0,861 Euro

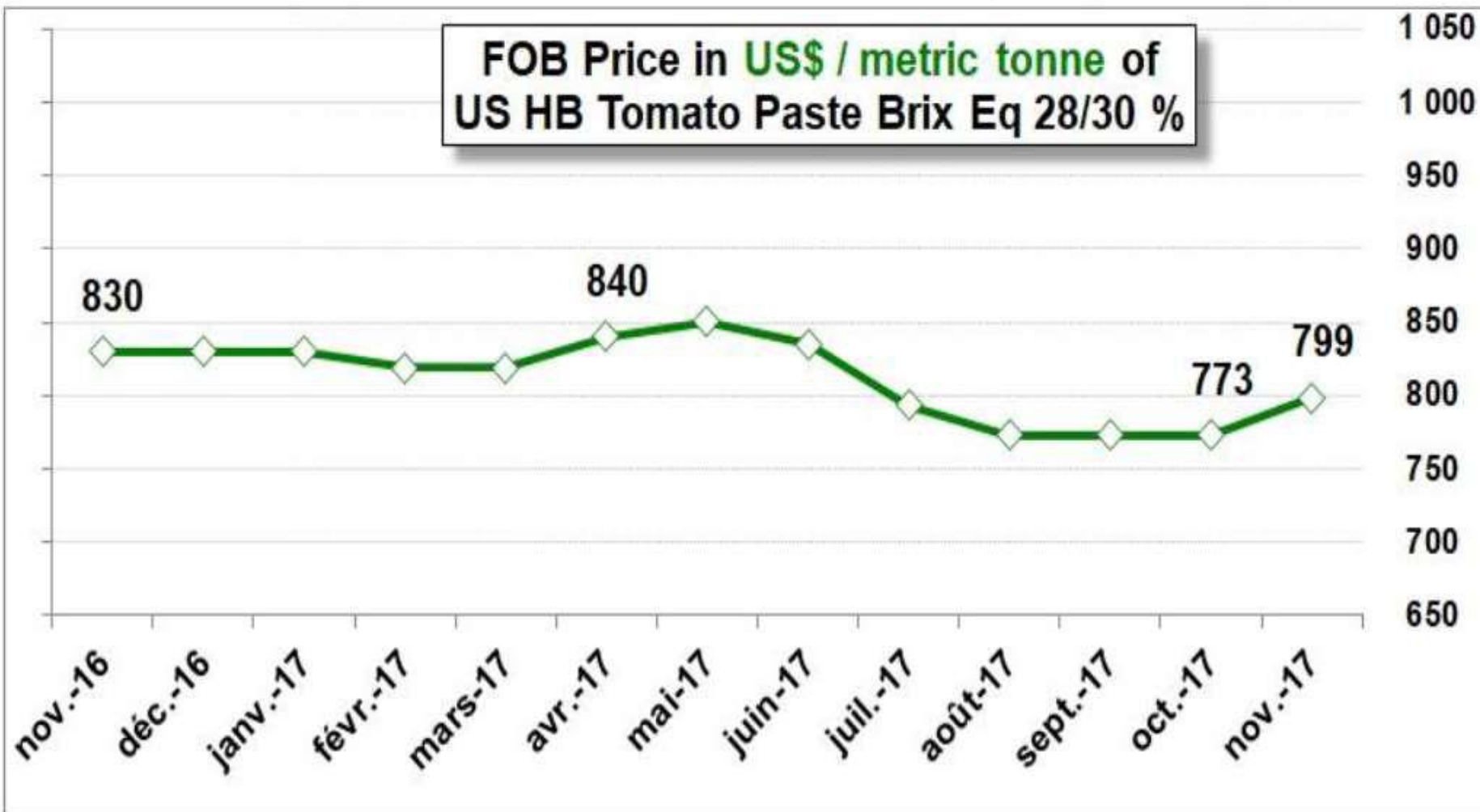


oct-17 exchange rate : 1 US\$  0,849 Euro



nov-17 exchange rate : 1 € ↘ 1,161 US\$

FOB Price in US\$ / metric tonne of
US HB Tomato Paste Brix Eq 28/30 %



(Sources : WestConFoods, The Morning Star Company, other)

Global Processing

Global Price



2018 congress



- 11 to 15 June on cruise ship between Greek Islands
- 15 & 16 June: Post-congress visits
- ISHS Symposium: call for papers ends 30 November
- Registrations at www.worldtomatocongress.com



See you on board!

