

APTRC: Australian Processing Tomato Research Council

Annual Industry Survey 2018



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Table of Contents

Executive Summary	2
1.0 2018 Survey Results	3
1.1 Industry Tonnage	3
1.2 Producers	4
1.3 Processors	4
1.4 Crop Area and Management.....	5
1.5 Field Yields	6
1.6 Soluble Solids	7
1.7 Soluble Solids per Hectare.....	8
1.8 Tomato Varieties	11
1.9 Yield and Solids Performance of the Main Varieties Grown with Drip Irrigation	11
1.10 Availability of Growers for 2018/19 Season	13
1.11 2017/18 Weather	13
2.0 Australian Market Overview	18
2.1 Imports	18
2.2 Exports	20
2.3 Export and Import Volumes Compared	22
2.4 Apparent Demand for Tomato Products	23
3.0 Australian and Californian Comparison	24
4.0 World Situation and Outlook	26
4.1 Global Production	26

Executive Summary

227,636 tonnes of tomatoes were delivered for processing during the 2017/18 season. This is an increase of about 23% or 42,954 tonnes on last year's intake. 331 tonnes of fruit was obtained from fresh tomato growers this season.

An area totalling around 2,457 hectares was planted by processing tomato growers during the 2017/18 season. A total of 49.7 hectares were not harvested this season due to delayed harvest or flooding during the early season.

An average yield of around 94.4 tonnes/ha was achieved by processing tomato growers, from harvested area. This was an increase from the previous year, but still a decrease from the record of 106.1 tonnes/ha achieved in 2014/15.

99.3% of the planted area was irrigated via sub-surface drip irrigation. This was down from 99.6% in the previous year. Only 1 grower in the industry used furrow irrigation during the 2017/18 season.

88% of the planted area was established with transplants, up from 86% the previous year. 2017/18 had the greatest ever percentage of crops established from transplants.

Average yield obtained from harvested area in Victoria equated to 93.4 t/ha, whereas the average yield from harvested area in NSW equated to 89.6 t/ha.

The average tomato soluble solids level was 4.89%.

15 specialist processing tomato grower enterprises supplied the entire intake during the season.

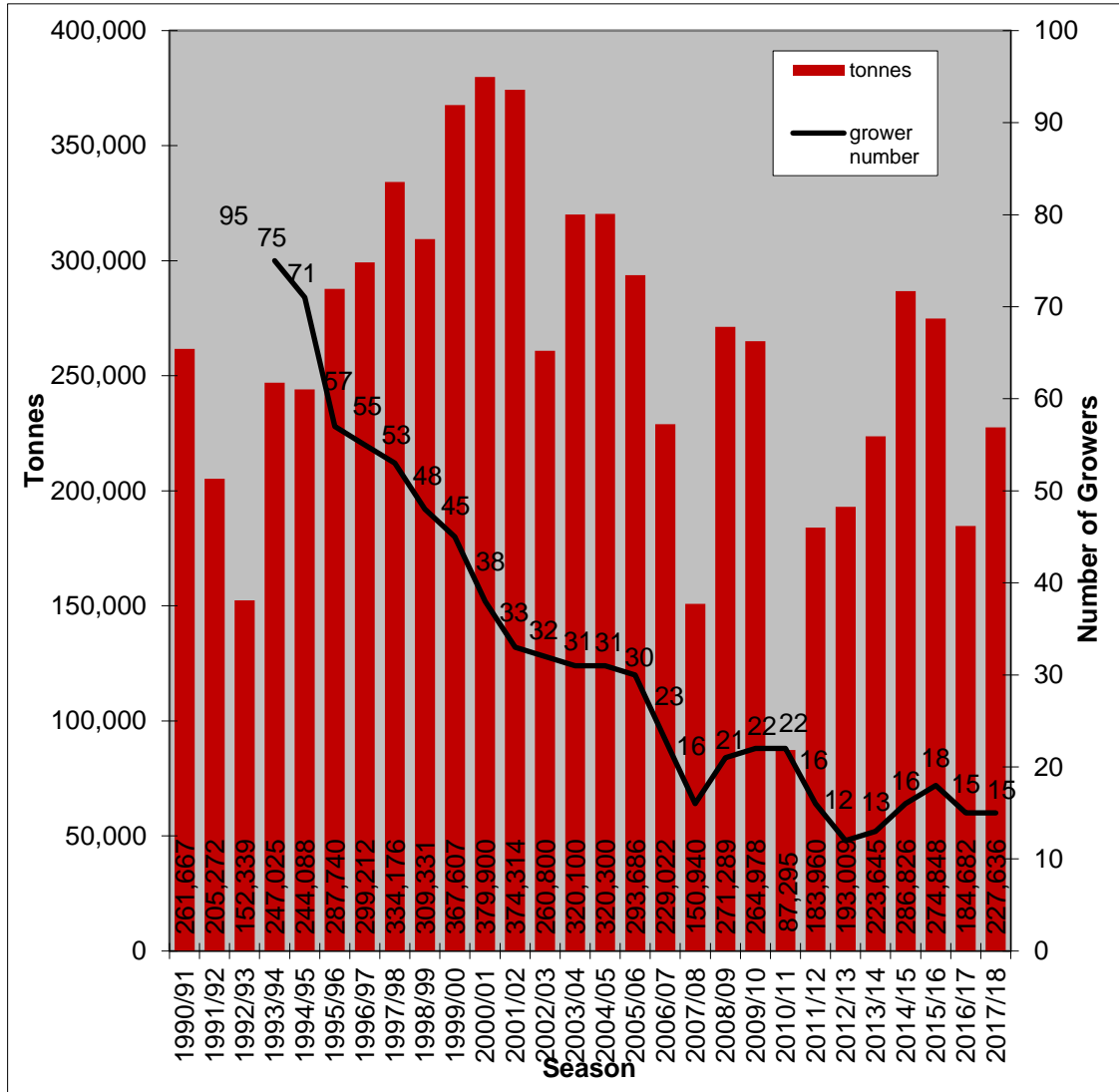
127,425 tonnes of tomato products valued at close to \$161 million were imported during 2017. This equated to an increase of 9,429 tonnes of processed tomato products. Peeled tomato products, particularly in retail packs, continue to be the major import category.

Exports equated to approximately 8,203 tonnes of product, down from 19,910 in the previous year. However, in raw tomato equivalent terms export volume has decreased 71% from the previous year

1.0 2018 Survey Results

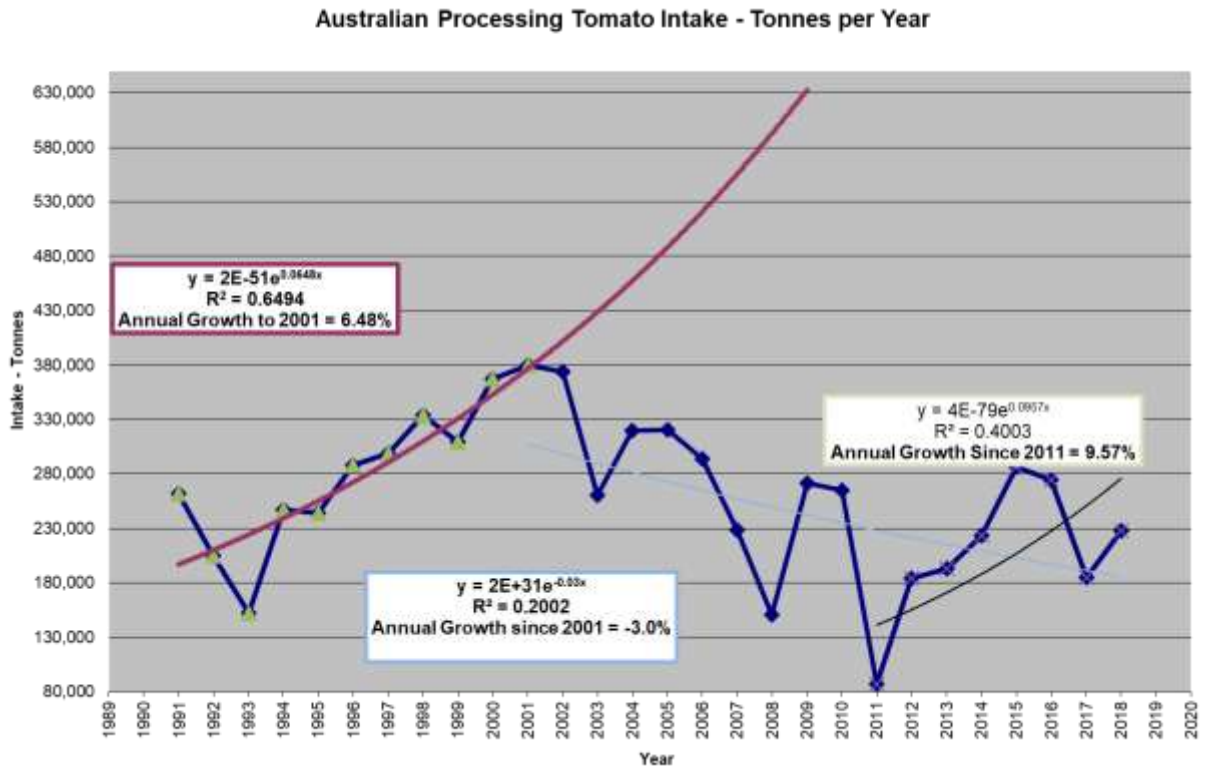
1.1 Industry Tonnage

Production from the 2017/18 harvest totalled approximately 227,636 tonnes, an increase of about 23% on the previous year. 331 tonnes of fruit were obtained from fresh tomato growers this season.



Graph 1.1a. Paid Tomato Tonnes Delivered

Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)



Graph 1.1b. Paid Tomato Tonnes Delivered, Depicting Annual Growth Trends
 NB. Annual trends, in particular since 2001, could be considered a weak relationship

1.2 Producers

15 specialist processing tomato grower enterprises supplied the entire intake during the season.

1.3 Processors

Three businesses processed tomatoes this year.

The two major processors, Kagome and SPC Ardmona, processed the majority of the total tonnes.

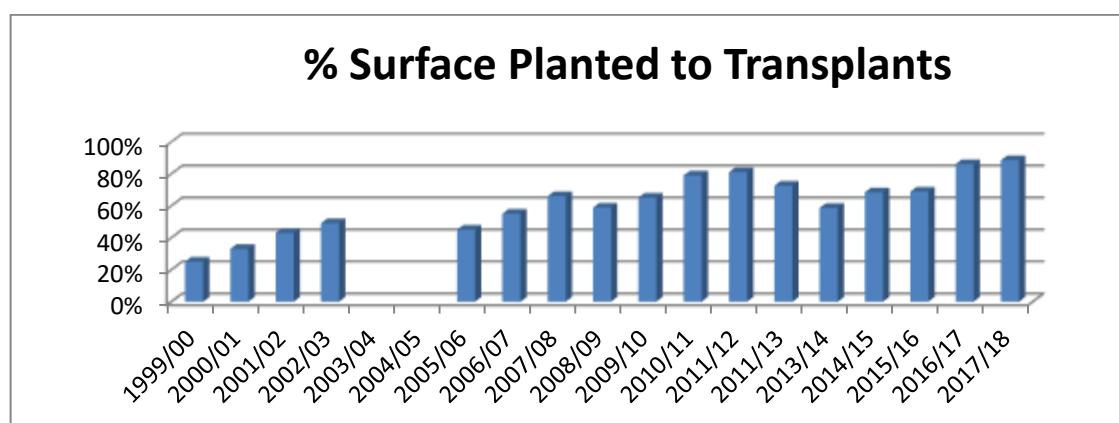
1.4 Crop Area and Management

An area totalling around 2,457 hectares was planted by processing tomato growers during the 2017/18 season. A total of 50 hectares were not harvested this season as they were abandoned due to factory power outage and subsequent harvest delay.

The total numbers of hectares established from transplants gradually decreased between 2011/12 to 2013/14, but increased again during the 2014/15 season and remained relatively constant until 2016/17, with 2017/18 having the greatest ever percentage of crops established from transplants.

Season	Hectares (Excl Market Growers)	Hectares Harvested	% Surface Under Drip	% Surface Transplants
1998/99	4,328		48%	21%
1999/00	5,108		49%	25%
2000/01	4,779		53%	33%
2001/02	4,486		55%	43%
2002/03	3,648		62%	46%
2003/04				
2004/05				
2005/06	3,500		65%	45%
2006/07	2,860		68%	55%
2007/08	2,308		74%	66%
2008/09	3,000		76%	57%
2009/10	3,442	2,806	80%	65%
2010/11	2,850	2,074	88%	79%
2011/12	2,366	1,962	90%	81%
2012/13	1,999	1,999	98.5%	72%
2013/14	2,385	2,329	95.0%	59%
2014/15	2,698	2,635	99.9%	68%
2015/16	2,782	2,697	98.3%	69%
2016/17	2,183	2,071	99.6%	86%
2017/18	2,457	2,407	99.3%	88%

Table 1.4. Penetration of Drip Irrigation and Transplants
Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)



Graph 1.4. Percentage of Production Area Irrigated by Sub-surface Drip
Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)

568 hectares of processing tomatoes were planted in NSW, producing a total of 50,873 tonnes.

Harvest began for SPC on 15 January with cherry tomatoes, with the main processing crop beginning on 29 January. Kagome commenced processing on 1 February 2018.

Harvest was completed for the 17/18 season on 2 May 2018, with processing completed by 4 May 2018.

1.5 Field Yields

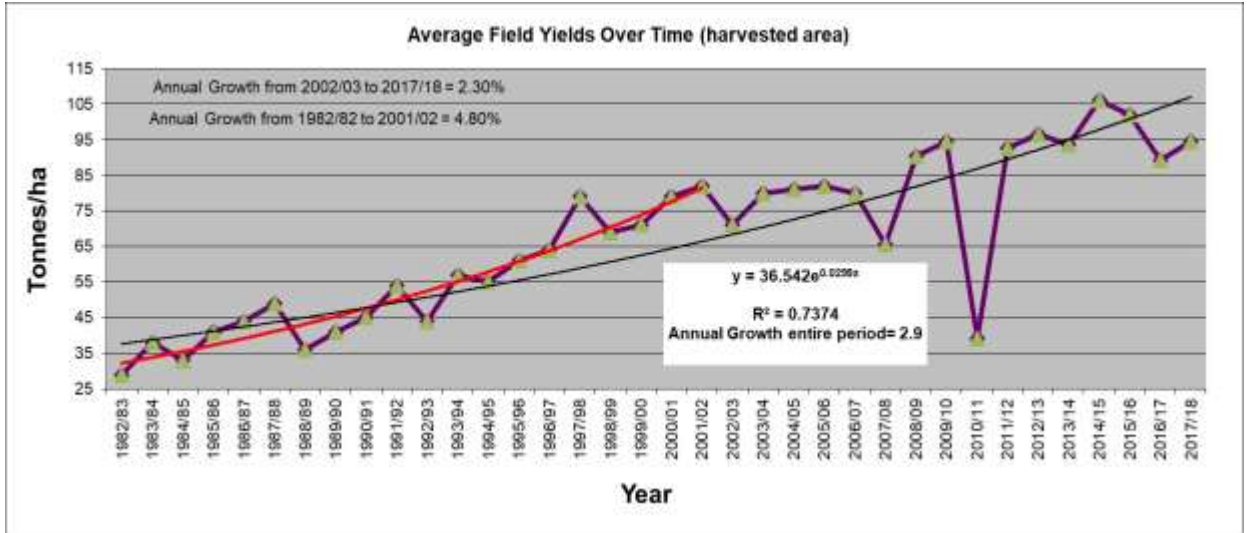
Average field yields have been calculated based on harvested area since 2009/10. Table 1.5 shows the difference in harvested and planted area since this time.

	Planted Area	Harvested Area	Average Yield (t/ha)		Reason entire area not harvested
			Planted Area	Harvested Area	
2009/10	3443	2806	77.0	94.4	wet harvest
2010/11	2850	2074	28.5	39.2	flooded crop
2011/12	2366	1962	76.8	92.6	wet harvest
2012/13	1999	1998	96.6	96.6	wet late harvest
2013/14	2386	2330	91.4	93.6	wet late harvest
2014/15	2700	2635	103.5	106.1	crop failure early in season
2015/16	2782	2697	98.8	101.9	poor crop stand, delayed harvest, over contract fruit
2016/17	2183	2071	84.6	89.2	delayed harvest due to rain
2017/18	2457	2407	92.5	94.4	abandoned due to factory power outage and subsequent harvest delay
5 year average	2410	2346	95.0	97.5	

NB. Excludes tonnes obtained from dedicated fresh tomato growers
Table 1.5. Planted and Harvested area since 2009/10

An average yield of around 94.4 tonnes/ha was achieved by processing tomato growers, from harvested area. This was an increase from the previous year, but a decrease from the record of 106.1 tonnes/ha achieved in 2014/15.

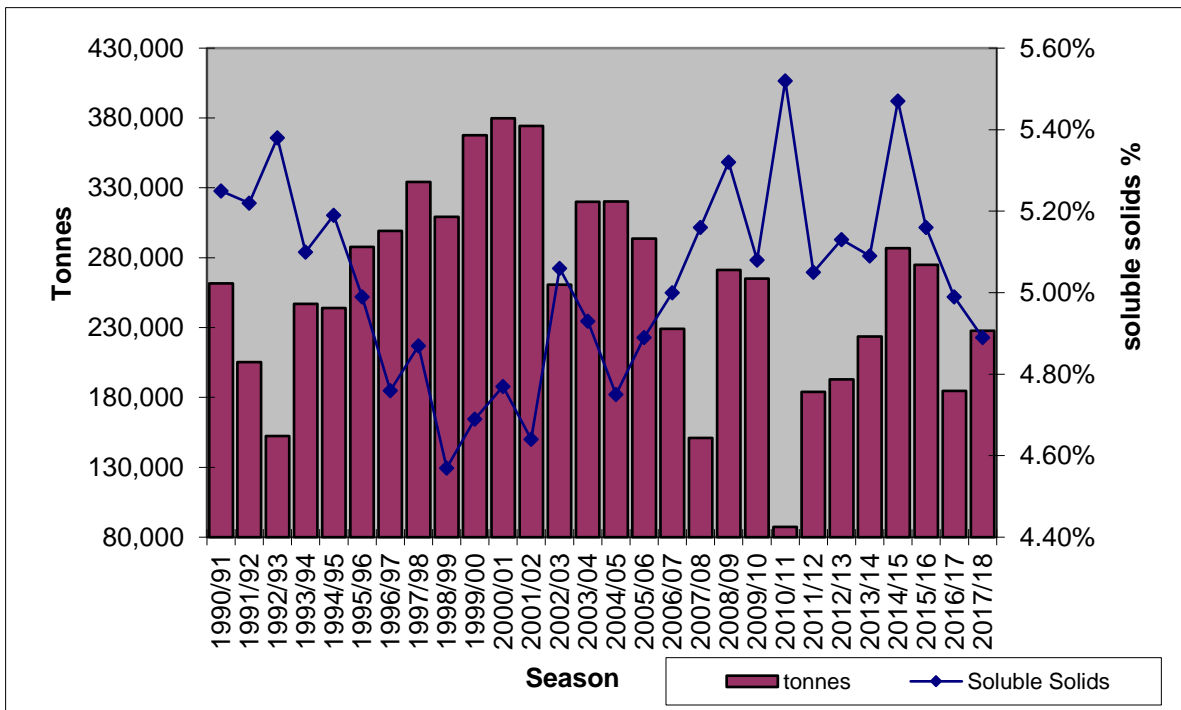
Average yield obtained from harvested area in Victoria equated to 93.4 t/ha, whereas the average yield from harvested area in NSW equated to 89.6 t/ha.



Graph 1.5. Field Yield Over Time

Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)

1.6 Soluble Solids

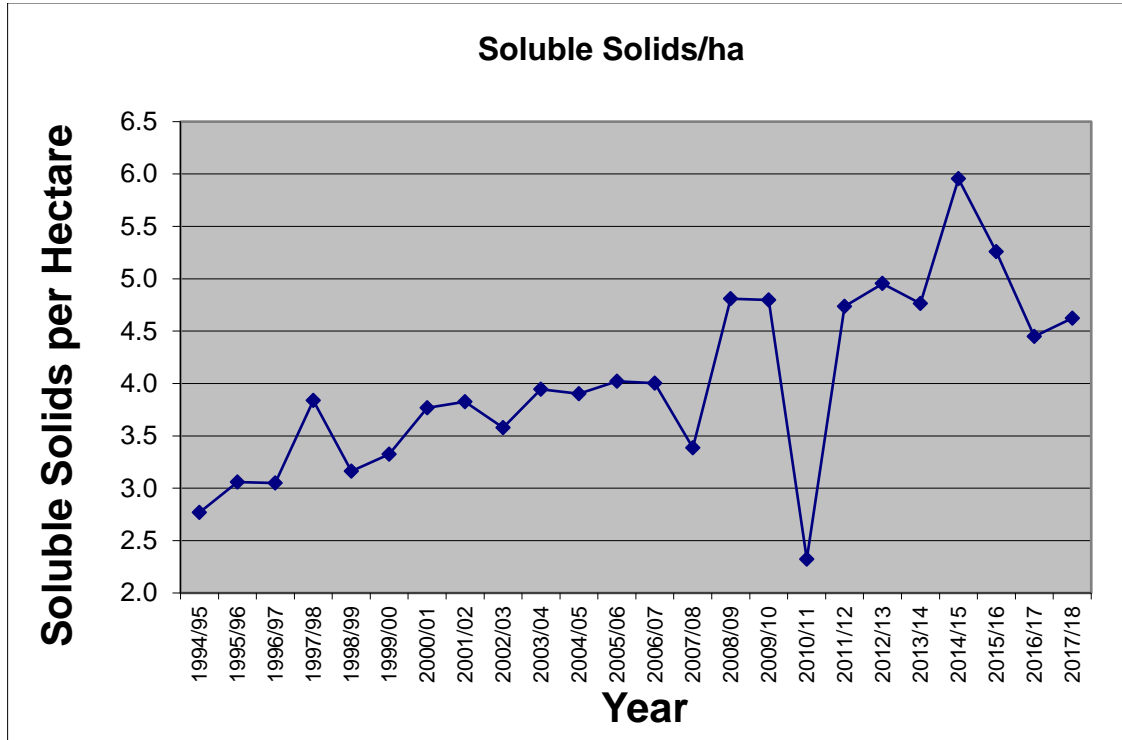


Graph 1.6. Soluble Solids History

Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)

Note: Soluble Solids for 2002/03 are calculated from approximately 180,000 tonnes. Soluble Solids for 2003/04 and 2004/05 are calculated from approximately 265,000 tonnes. Soluble solids for 2006/07 are calculated from approximately 214,500 tonnes. Soluble solids for 2007/08 are calculated from approximately 131,879 tonnes. Soluble solids for 2008/09 are calculated from approximately 251,539 tonnes, and for 2009/10 from approximately 245,791 tonnes. During 2010/11 soluble solids was calculated from 81,745 tonnes, 2011/12 from 170,137 tonnes, 2012/13 from 189,565 tonnes, 2013/14 from 203,665 tonnes and 278,826 tonnes, 2014/15 from 271,479 tonnes, 2015/16 from 266,384 tonnes, 2016/17 from 179,995 tonnes, 2017/18 from 221,805 tonnes

1.7 Soluble Solids per Hectare



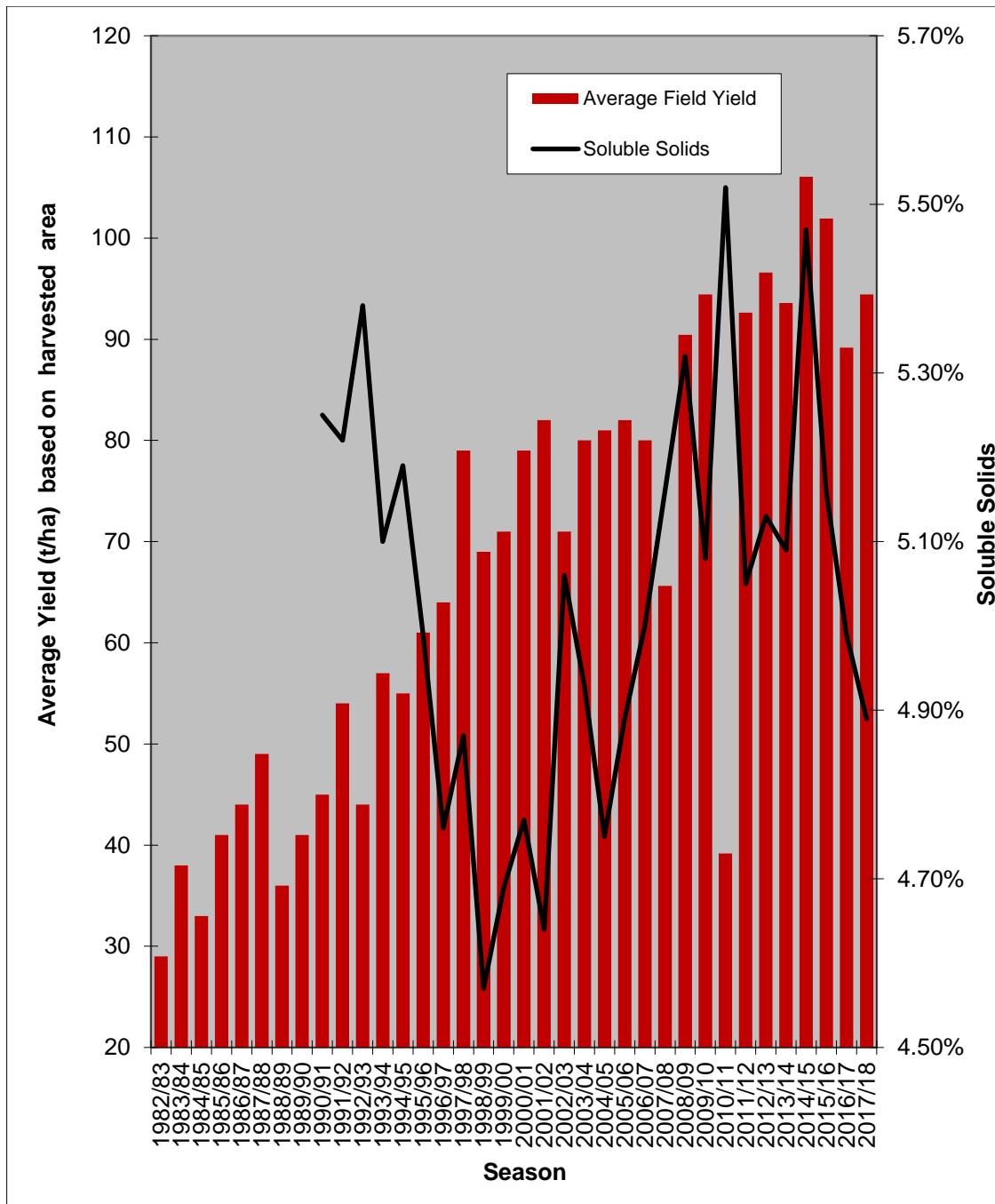
Graph 1.7.a. Soluble Solids per Hectare

	Soluble Solids	Tonnes SS/ha	Tonnes Soluble Solids
1994/95	5.19%	2.769	12,668
1995/96	4.99%	3.059	14,358
1996/97	4.76%	3.051	14,242
1997/98	4.87%	3.839	16,274
1998/99	4.57%	3.164	14,136
1999/00	4.69%	3.324	17,241
2000/01	4.77%	3.767	18,121
2001/02	4.64%	3.826	17,368
2002/03	5.06%	3.578	13,196
2003/04	4.93%	3.945	15,781
2004/05	4.75%	3.901	15,214
2005/06	4.89%	3.988	14,357
2006/07	5.00%	4.003	11,450
2007/08	5.16%	3.353	7,739
2008/09	5.32%	4.811	14,433
2009/10	5.08%	4.797	13,461
2010/11	5.52%	2.290	4,819
2011/12	5.05%	4.735	9,290
2012/13	5.13%	4.953	9,901
2013/14	5.09%	4.763	11,096
2014/15	5.47%	5.954	15,689
2015/16	5.16%	5.259	14,182
2016/17	4.99%	4.450	9,216
2017/18	4.89%	4.624	11,131

Table 1.7.a. National Production of Soluble Solids

Source: - Industry Survey & Horn, B (2000, 2001, 2002, 2003)

NB. Excludes tonnes from fresh market growers



Graph 1.7.b. Soluble Solids and Average Yield Comparison
 (excludes tonnes from fresh tomato growers, and based on harvested area)

As shown in Graph 1.7.b soluble solids seem to decrease as average yields increased. In 2008/09 this trend appeared to have changed, as both average yields and soluble solids levels increased in that year. This may have been attributed to a change in the main variety being grown and also a change in general crop nutrition. Following research work conducted by the industry at this time, growers became more aware of crop nutrition and began applying a range of different macro and micro nutrients through fertigation.

From 2015/16 onwards the average soluble solids decreased, along with the average yields. This may possibly be attributed to less new ground being planted.

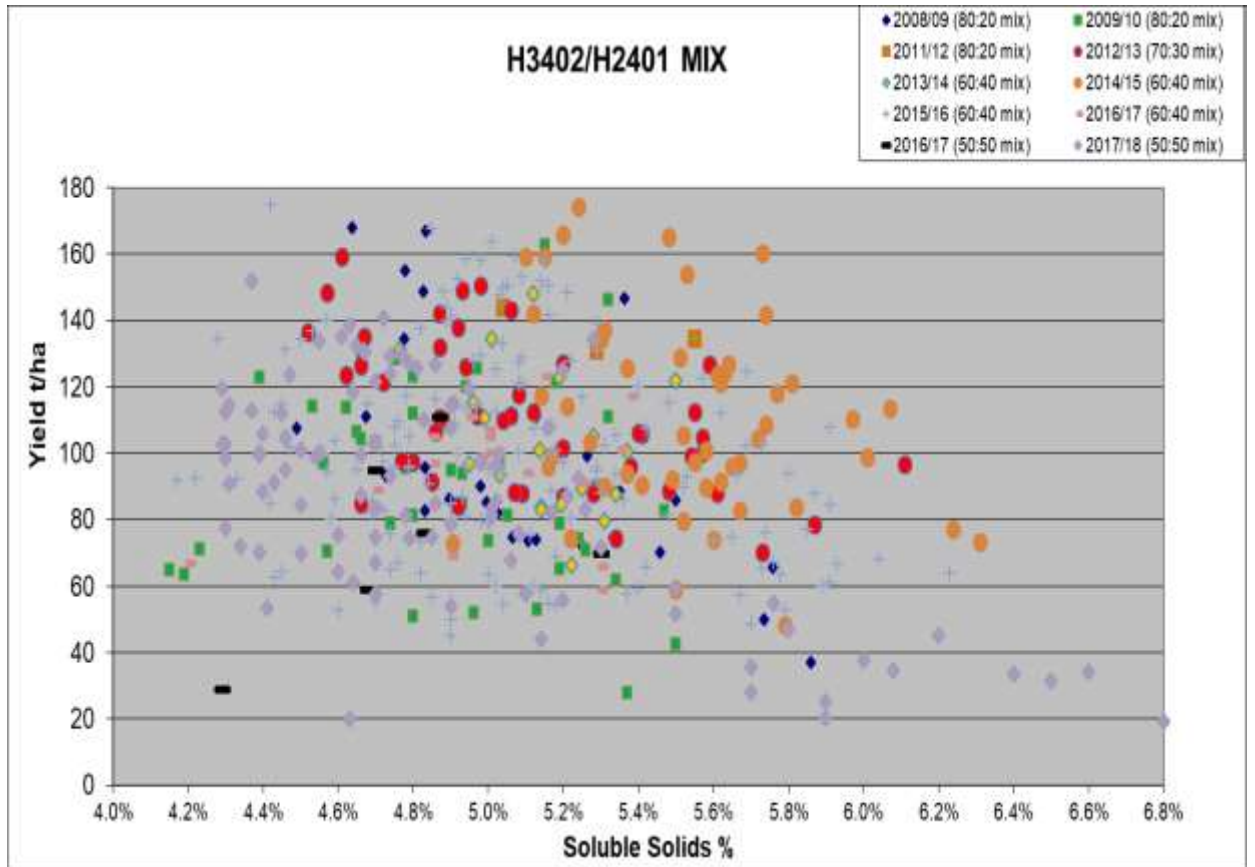
1.8 Tomato Varieties

Variety	Hectares planted	%
H3402/H2401 Mix (50:50)	1012.6	41.2%
H3402	452.1	18.4%
H3402/H1175 Mix (50:50)	366.9	14.9%
H1015	336.7	13.7%
H4401	155.9	6.3%
UG19406 /UG18806 (50:50)	75.6	3.1%
H1307	15.5	0.6%
H1301	15.3	0.6%
Cherry	7.7	0.3%
H1311	5.0	0.2%
UG16112	4.5	0.2%
Lycobol	2.6	0.1%
KGM 121	2.0	0.1%
UG 18806	2.0	0.1%
H1175	1.9	0.1%
H1538	0.7	0.0%
UG19406	0.3	0.0%
Total	2457	100%

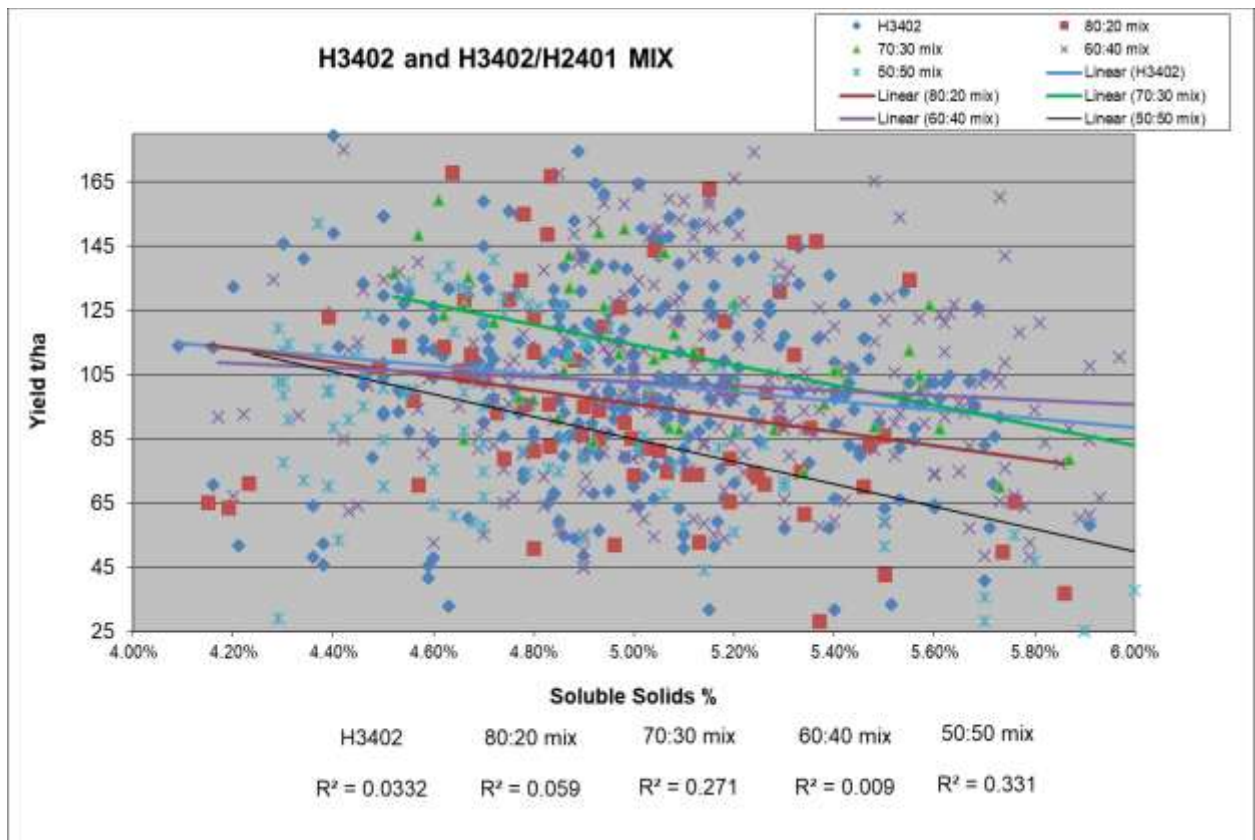
Table 1.8. Varieties Grown by the Industry
Source: - Industry Survey (planted area per variety)

1.9 Yield and Solids Performance of the Main Varieties Grown with Drip Irrigation

During the 2017/18 season the main variety grown was H3402/H2401 mix, at the ratio once again of 50:50.



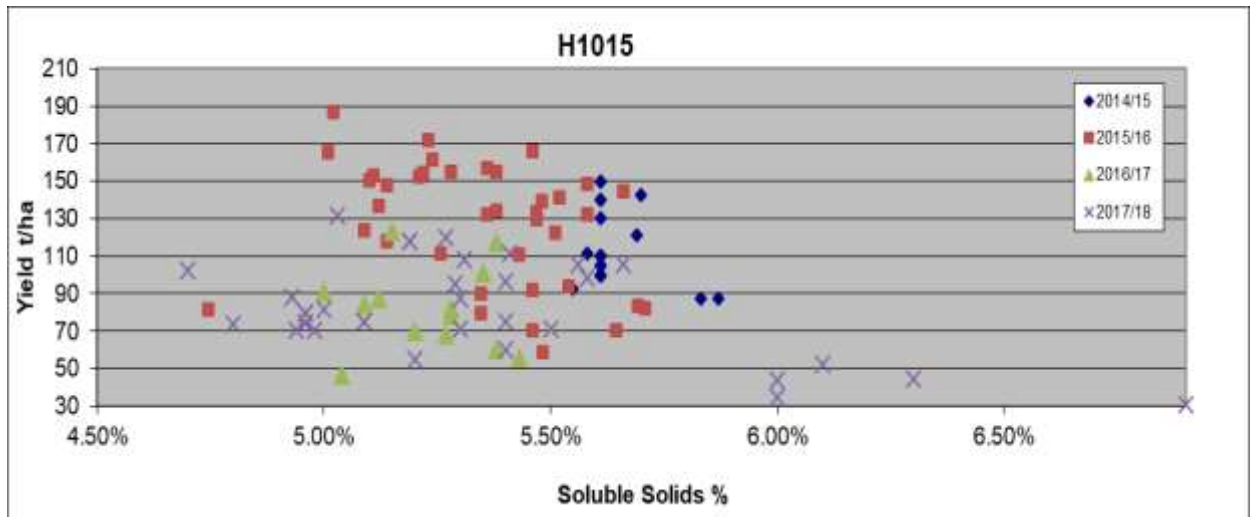
Graph 1.9.a. H3402/H2401 Yield and Soluble Solids Over the Past 10 Seasons



Graph 1.9.b. H3402 and H3402/H2401 Yield and Soluble Solids Over the Past 10 Seasons

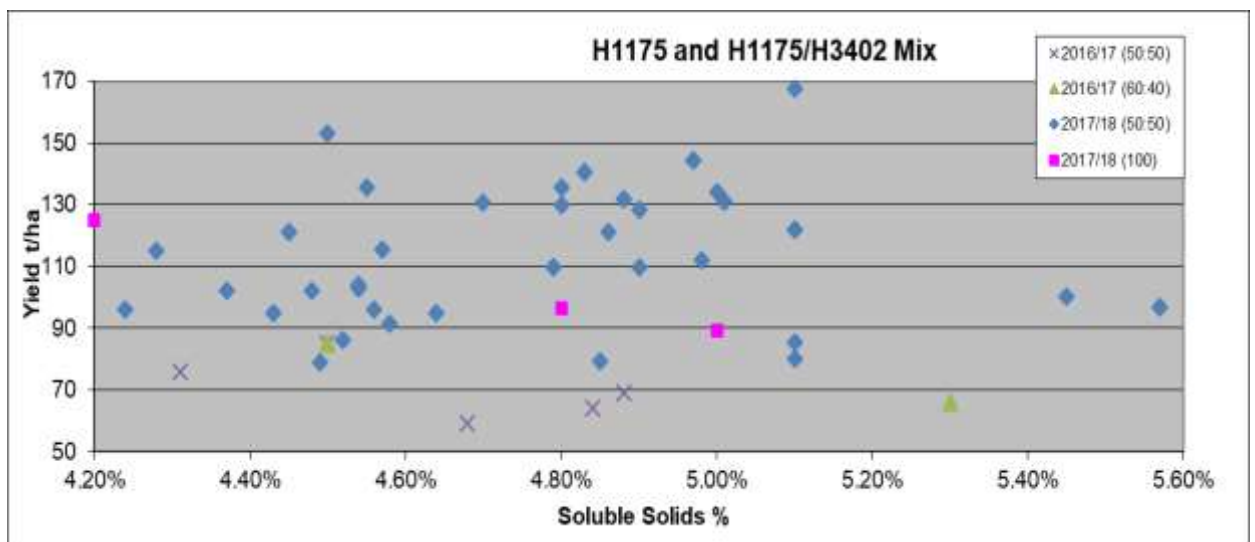
As shown in the above graph, yield and solids for H3402 and H3402/H2401 do not appear to be inversely related. As R^2 values become closer to 1.0, the better the fit of the regression line. That is, the closer the line passes through all of the points.

As shown in Graph 1.9.b there does not appear to be any large difference in potential yield or soluble solids of H3402, compared to the H3402/H2401 mixes.



Graph 1.9.c. H1015 Yield and Soluble Solids Over the Past 4 Seasons

H1015 is the main variety being grown for earliness.



Graph 1.9.d. H1175 and the H1175/H3402 mix Yield and Soluble Solids Over the Past 2 Seasons

1.10 Availability of Growers for 2018/19 Season

At the time of writing two growers have confirmed that they will not be growing during the coming season.

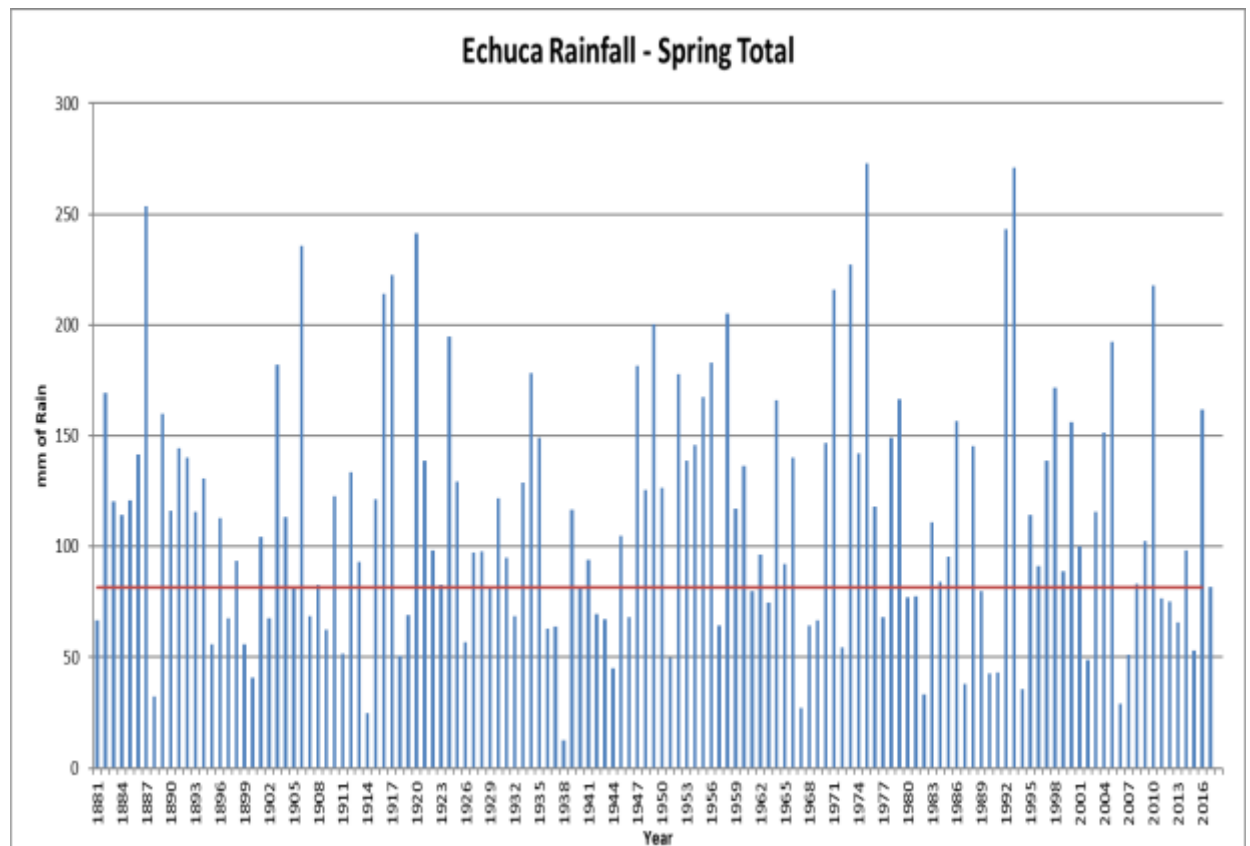
1.11 2017/18 Weather

The 2017/18 season presented itself with a different set of challenges. At the start of the season a record lowest spring temperature for Deniliquin was recorded on 17 September 2017 at -2.1°C, with spring 2017 in Victoria being the 4th warmest spring on record.

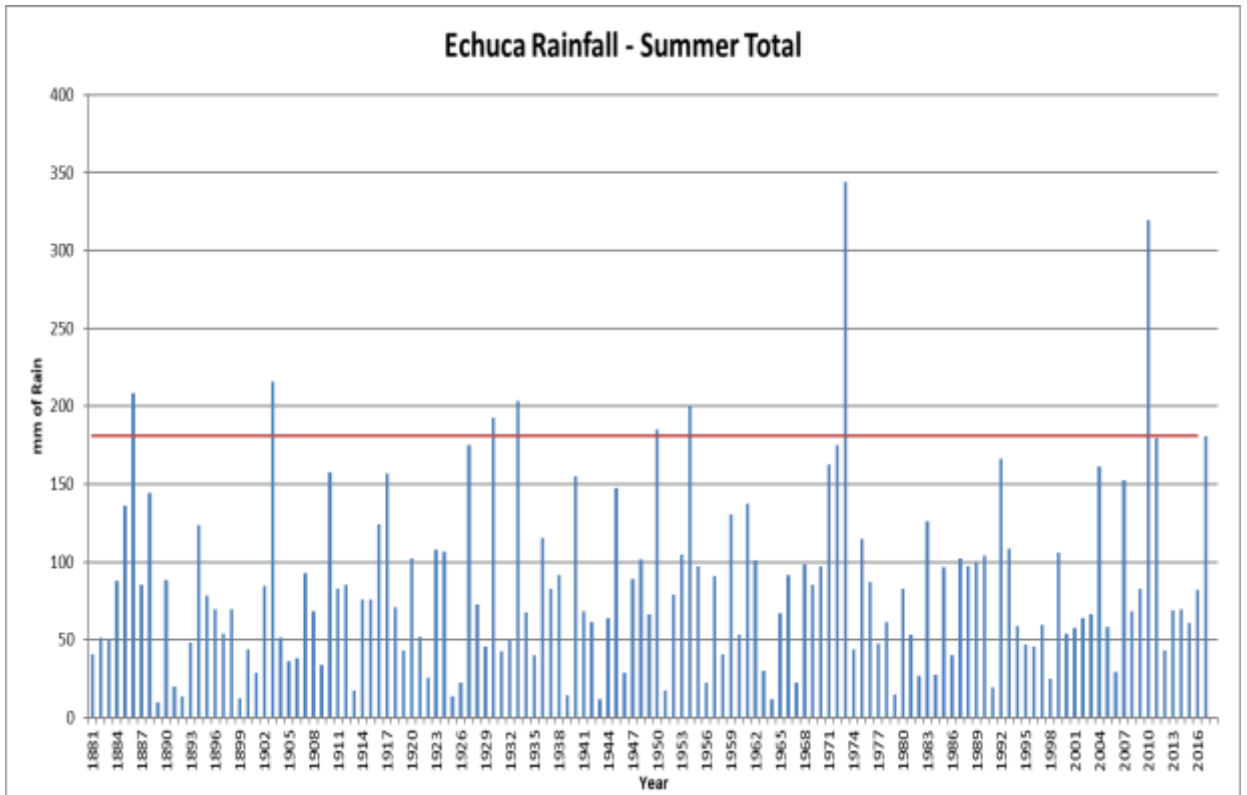
During mid-November, 30mm plus of rain fell across the production region. This was then followed in early December with further rain, with some areas experiencing in excess of 120mm during a 24 hour period. Echuca had 123mm of rain on 2 December 2017, which was the highest December rainfall event on record since 1903. During December 2017 the total rainfall for Echuca was 147mm, which was the highest total December rainfall since 1930.

Unfortunately, this did result in water logging in some regions, although the full extent of the damage to crops was not known until harvest. Yields were disappointing throughout the season, with early crops affected by the heavy rain in late November and early December. Rainfall during February, March and April 2018 was well below the long term average. This enabled harvest to occur with few interruptions due to weather events.

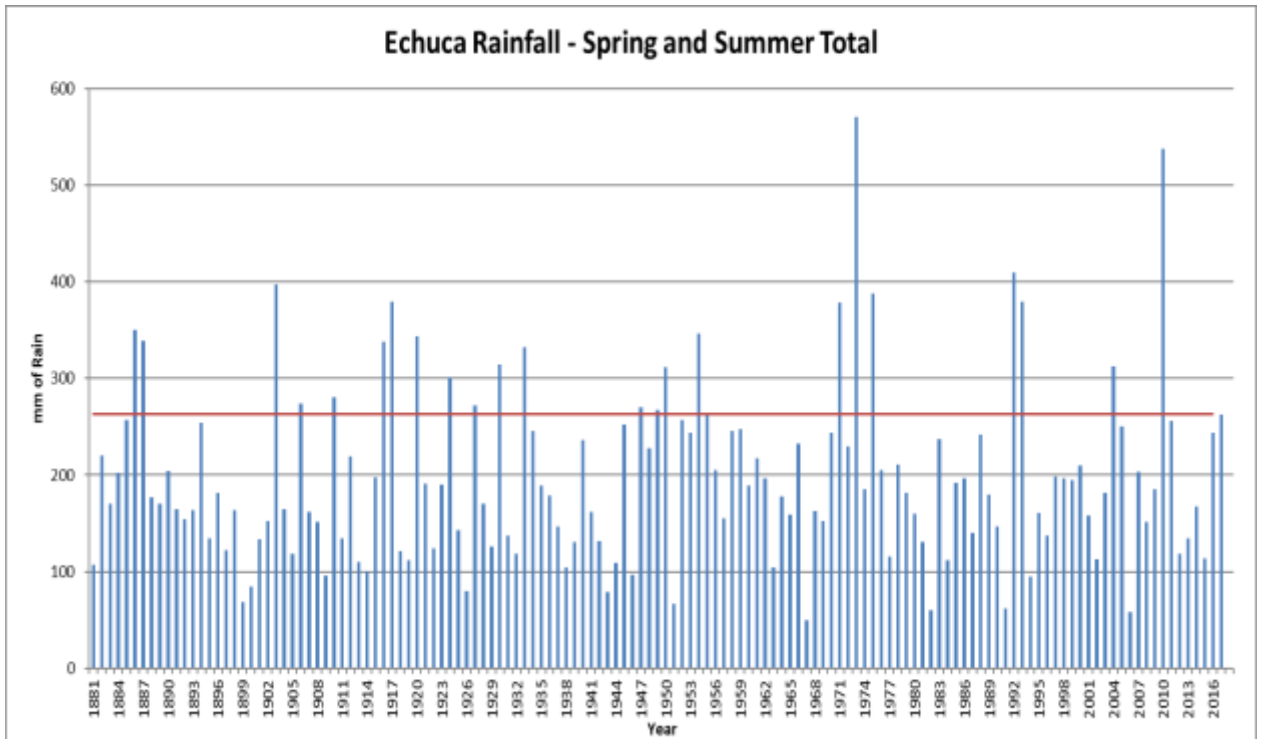
Nights were especially warm during summer, with Victoria's third warmest summer on record for minimum temperatures. The highest summer temperature was recorded on 20 January 2018, reaching 44.1°C for Echuca and 44.2°C for Deniliquin. (Data from <http://www.bom.gov.au/>)



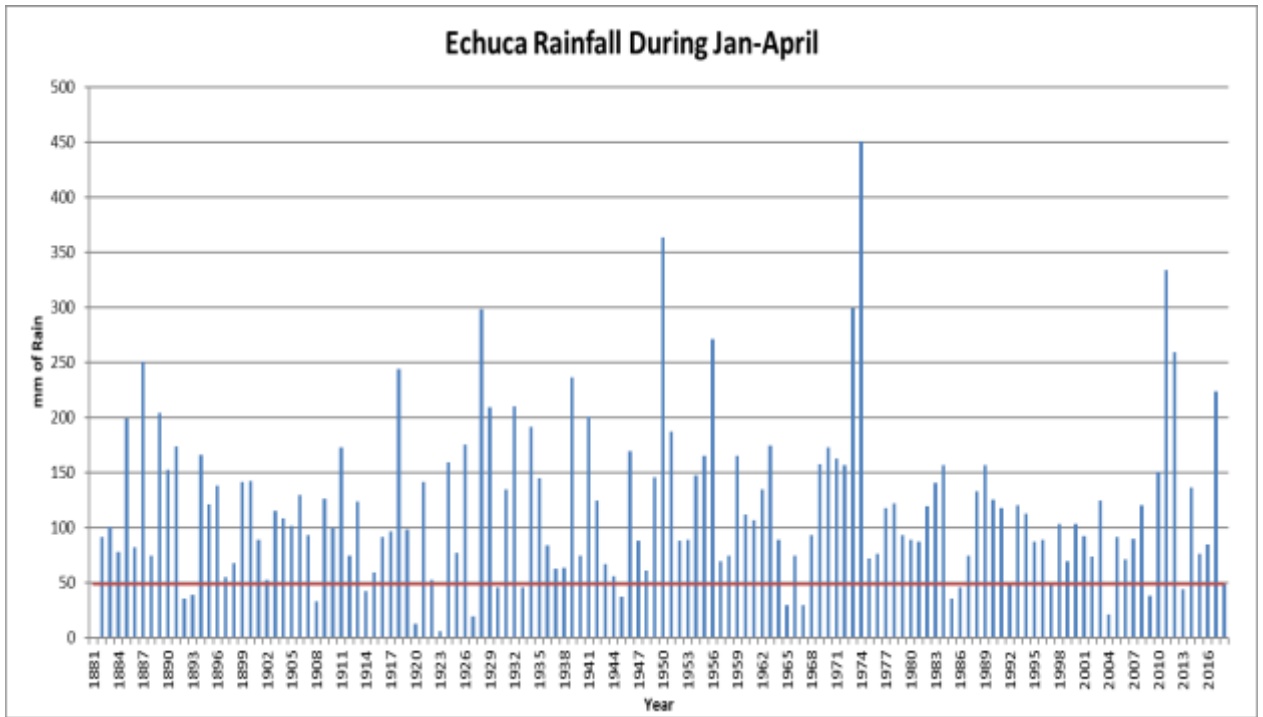
Graph 1.11a. Historical Spring Rainfall Data for Echuca



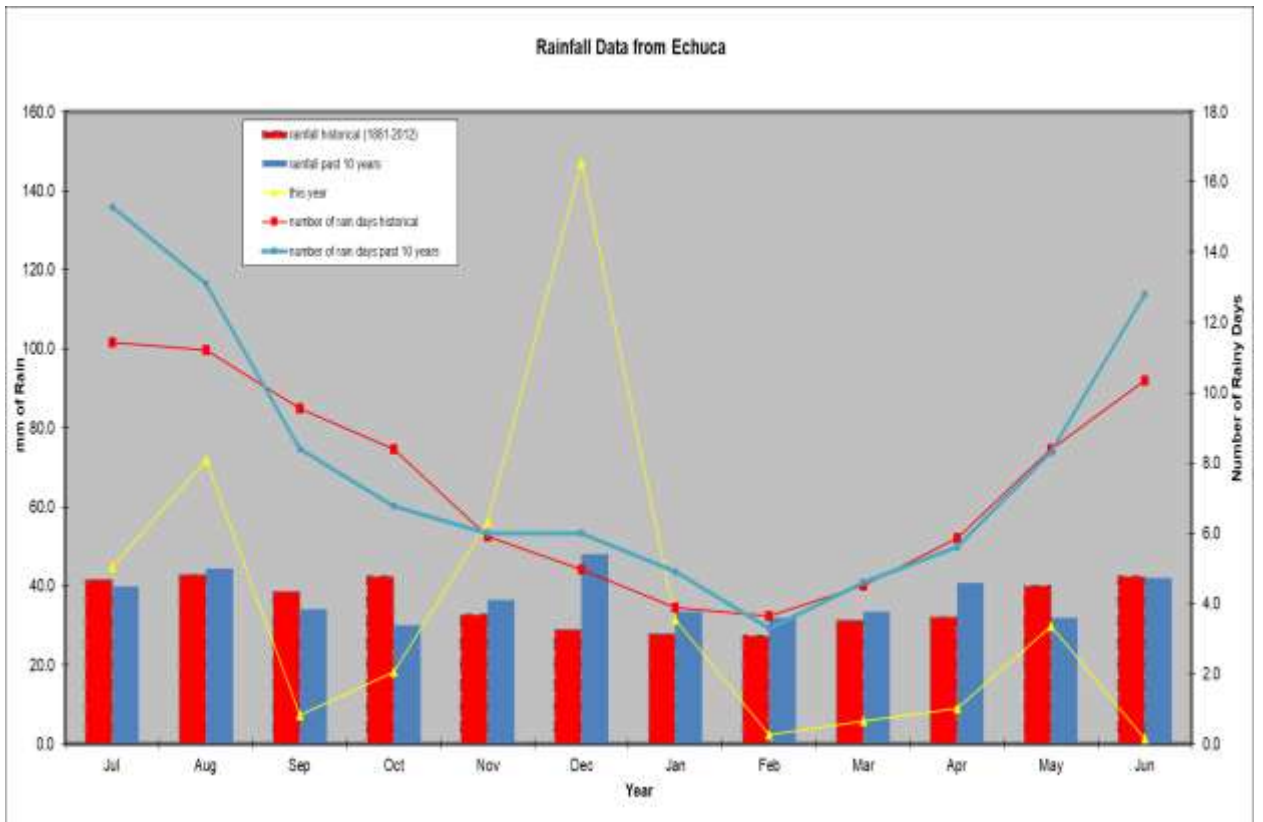
Graph 1.11b. Historical Summer Rainfall Data for Echuca



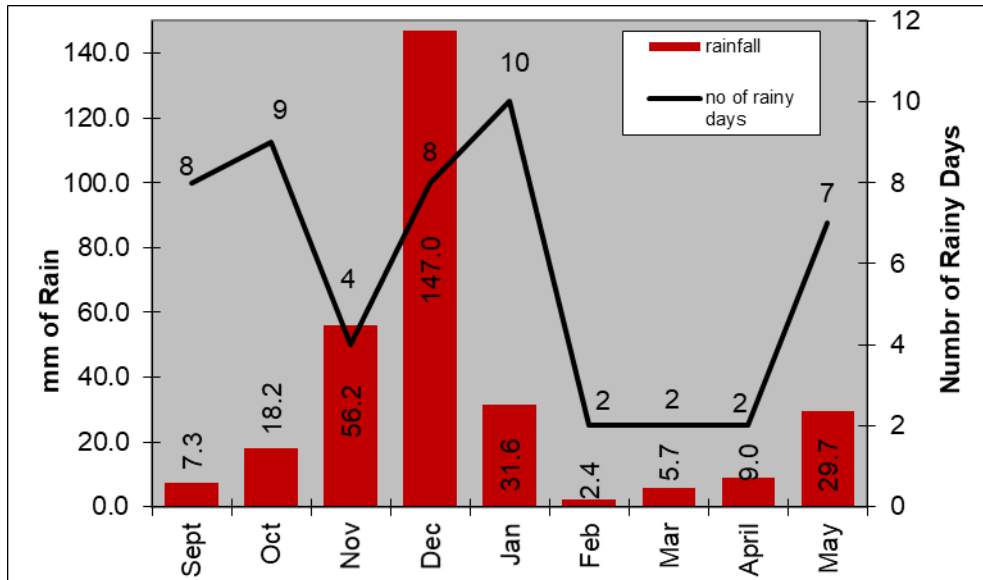
Graph 1.11c. Historical Combined Spring and Summer Rainfall Data for Echuca



Graph 1.11d. Historical Rainfall Data for Echuca Jan to April



Graph 1.11e. Historical Rainfall Data for Echuca July to June



Graph 1.11f. 2017/18 Monthly Rainfall Data for Echuca

2.0 Australian Market Overview

2.1 Imports

127,425 tonnes of tomato products valued at close to \$161 million were imported during 2017. This equated to an increase of 9,429 tonnes of processed tomato products. Peeled tomato products, particularly in retail packs, continue to be the major import category.

Product	2007		2008		2009		2010		2011		2012		2013		2014		2015		2016		2017	
	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne
Dried/powder	8,696	1,888	8,890	1,783	7,380	1,786	8,140	1,815	9,101	2,718	8,779	1,958	9,444	1,956	9,559	1,797	8,037	1,344	9,188	1,725	10,637	1,897
Peeled/pieces																						
In packs <1.14L	31,538	32,888	51,257	44,215	39,683	36,335	48,431	44,573	43,889	45,792	41,876	44,703	43,436	43,691	45,003	38,782	48,008	41,111	45,263	37,240	43,186	39,412
In packs >1.14 L	9,825	11,916	13,085	13,742	9,530	11,034	10,031	13,445	12,692	17,677	12,248	16,964	14,322	17,191	25,506	25,820	25,274	25,535	19,175	20,907	19,316	21,820
All peeled/pcs	41,363	44,804	64,342	57,957	49,213	47,369	58,462	58,018	56,580	63,469	54,124	61,667	57,758	60,882	70,509	64,602	73,282	66,646	64,438	58,147	62,501	61,232
Paste/puree																						
In packs <1.14 L	9,206	8,167	12,645	9,532	12,727	9,050	14,786	11,705	11,672	10,806	12,874	12,247	15,149	13,434	18,962	13,996	22,874	16,788	22,975	17,122	22,765	17,987
In packs >1.14 L	20,358	22,038	38,344	36,978	18,754	18,389	16,908	17,852	33,824	40,385	20,953	24,788	20,902	24,202	19,033	18,207	21,721	17,144	24,722	21,695	25,275	23,422
All paste/puree	29,564	30,205	50,989	46,510	31,481	27,439	31,694	29,557	45,496	51,191	33,827	37,035	36,051	37,636	37,995	32,203	44,596	33,932	47,696	38,817	48,039	41,409
Juice (Litres*1,000)	101	75	41	30	62	40	74	78	179	130	238	240	114	125	128	105	106	69	67	76	83	35
Sauce/ketchup (Litres*1,000)	11,554	7,828	12,109	7,844	10,845	7,207	14,628	11,157	14,716	13,380	7,096	14,451	24,187	16,817	31,317	19,314	33,676	19,638	33,258	19,231	39,905	22,853
Total	91,278	84,800	136,371	114,123	98,980	83,841	112,998	100,625	126,073	130,888	104,065	115,351	127,554	117,416	149,508	118,021	159,696	121,628	154,646	117,997	161,165	127,425

Table 2.1.A. Imports of Tomato Products¹

Source: - Australian Bureau of Statistics

Import volume was equivalent to about 399,488 tonnes of raw tomatoes, an 8.0% increase from the previous year.

Product	Factor	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Dried/powder	20	37,760	35,660	35,720	36,291	54,358	39,155	39,125	35,940	26,875	34,506	37,934
Whole/pcs <1.14L	1.1	36,177	48,636	39,969	49,030	50,371	49,173	48,060	42,660	45,222	40,965	43,354
Whole/pcs >1.14L	1.1	13,108	15,116	12,137	14,790	19,445	18,661	18,911	28,402	28,088	22,997	24,002
Paste/puree <1.14L	6.0	49,002	57,194	54,301	70,232	64,835	73,484	80,602	83,976	153,210	102,733	107,923
Paste/puree >1.14L	6.0	132,228	221,866	110,332	107,112	242,310	148,728	145,214	109,242	102,866	130,171	140,532
Juice[1]	1.1	82.5	33	43	86	143	264	137	116	75	83	38
Sauce/ketchup	2	15,656	15,688	14,415	22,314	26,760	28,902	33,633	38,628	39,276	38,462	45,705
Total Tomato		284,013	394,193	266,916	299,855	458,223	358,367	365,682	338,964	395,613	369,918	399,488

NB. Conversion factor for paste/puree was changed from 5.5 to 6.0 in 2010

[1] Juice exports are recorded in litres. In this report, one litre of juice is assumed to weigh one kilogram.

Table 2.1.B. Equivalent Tonnes Raw Tomato Imported²

Source: - Australian Bureau of Statistics and ATPA Conversion Factors

NB. Conversion factor for paste/puree has changed from 5.5 to 6.0 as reported in industry reports prior to 2011

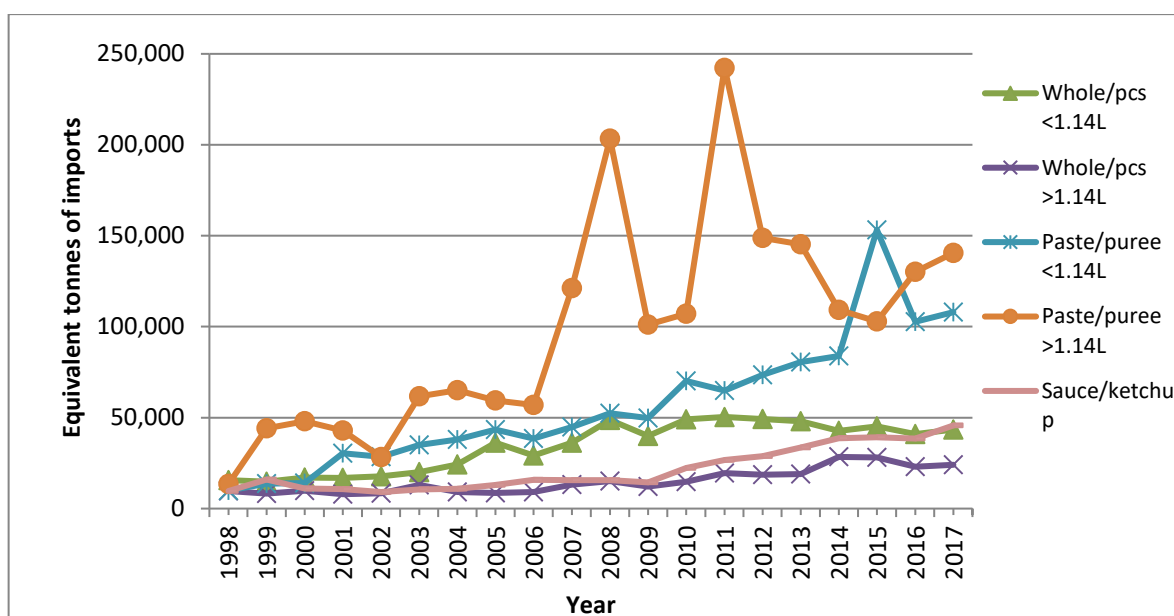
¹ Trade statistics relating to juice and sauce report quantities in litres rather than kilograms. Throughout this report, one litre of product is assumed to weigh one kilogram.

² The Australian Tomato Processors Association previously provided the product to raw material conversion factors used throughout this report from Horn, B (2003).

Product	\$'000	% of Tonnes	Tonnes	\$/kg
Dried/powder				
Total	\$10,637		1,897	\$5.61
Turkey	\$5,466	56%	1,056	\$5.17
New Zealand	\$1,795	10%	195	\$9.21
Portugal	\$611	7%	137	\$4.47
Whole/pieces <1.14L				
Total	\$43,186		39,412	\$1.10
Italy	\$39,959	97%	38,040	\$1.05
Turkey	\$2,072	2%	601	\$3.45
Spain	\$462	1%	433	\$1.07
Whole/pieces >1.14L				
Total	\$19,316		21,820	\$0.89
Italy	\$15,046	86%	18,784	\$0.80
Portugal	\$1,525	7%	1,470	\$1.04
USA	\$961	4%	903	\$1.06
Paste/puree <1.14L				
Total	\$22,765		17,987	\$1.27
Italy	\$16,974	79%	14,248	\$1.19
China	\$4,404	16%	2,892	\$1.52
Turkey	\$487	2%	324	\$1.51
Paste/puree >1.14L				
Total	\$25,275		23,422	\$1.08
USA	\$9,441	42%	9,924	\$0.95
Italy	\$4,793	21%	4,930	\$0.97
China	\$6,054	21%	4,817	\$1.26
Tomato Juice (Litres*1000)				
Total	\$83		35	\$2.39
USA	\$48	59%	21	\$2.35
United Kingdom	\$33	35%	12	\$2.71
Canada	\$1	4%	1	\$0.73
Sauce/ketchup (Litres*1,000)				
Total	\$39,905		22,853	\$1.75
Italy	\$23,113	52%	11,853	\$1.95
New Zealand	\$5,847	17%	3,849	\$1.52
USA	\$2,275	10%	2,283	\$1.00

Table 2.1.C. Main Sources of Imports in 2017

Source: - Australian Bureau of Statistics



Graph 2.1 2016/17 Equivalent Tonnes of Imports

The following comments are based on the above table:

- Majority of Dried Tomato imports are from Turkey at 1,056 tonnes, an increase of 2.3% from 1,032 tonnes in 2016.
- Majority of Whole/pieces are imported from Italy, at 56,825 tonnes, an increase of 6.4% from 53,385 tonnes in 2016.
- Majority of Paste <1.14 litres imports are from Italy at 14,248 tonnes, an increase of 11.6% from 12,763 tonnes in 2016.
- Majority of Paste >1.14 litres imports are from USA at 9,924 tonnes, an increase of 1.1% from 9,816 tonnes in 2016.
- Majority of the Juice imports are from USA at 21 thousand litres, a decrease of 68.1% from 66 thousand litres in 2016.
- Majority of the Sauce/Ketchup imports are from Italy at 11,853 thousand litres, an increase of 13.2% from 10,468 thousand litres in 2016.

2.2 Exports

Product	2007		2008		2009		2010		2011		2012		2013		2014		2015		2016		2017	
	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne	\$'000	Tonne
Whole/pieces	5,757	1,645	5,442	2,077	6,166	2,417	3,419	869	2,581	941	3,744	1,437	2,926	977	2,818	2,320	2,612	678	2,027	419	777	121
Paste/puree	1,870	819	959	595	1,281	802	1,040	650	1,011	541	2,368	1,915	3,156	2,498	7,278	5,633	8,777	7,291	16,337	17,420	4,152	3,642
Sauce/ketchup	8,559	3,930	10,003	4,799	7,453	4,444	11,329	5,266	10,238	4,667	5,236	2,067	3,996	1,609	4,267	1,762	9,923	4,098	5,210	2,020	8,243	4,399
Juice[1]	706	497	394	242	72	60	46	43	191	183	275	215	223	203	202	177	143	119	79	52	49	45
Total	16,892	6,891	16,798	7,713	14,972	7,722	15,833	6,828	14,021	6,332	11,623	5,634	10,302	5,288	14,565	9,892	21,456	12,186	23,652	19,910	13,222	8,208

[1] Juice exports are recorded in litres. In this report, one litre of juice is assumed to weigh one kilogram.

Table 2.2.A. Exports of Tomato Products

Source: - Australian Bureau of Statistics

Exports equated to approximately 8,208 tonnes of product, down from 19,910 in the previous year. However, in raw tomato equivalent terms export volume has decreased 71% from the previous year.

Product	Factor	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Whole/pieces	1.1	1,810	2,285	2,658	956	1,035	1,581	1,075	2,552	746	461	133
Paste/puree	6	4,914	3,570	4,810	3,900	3,248	11,492	14,987	33,800	43,747	104,518	21,852
Sauce/ketchup	2	7,860	9,598	8,888	10,532	9,334	4,134	3,218	3,524	8,196	4,039	8,799
Juice [1]	1.1	547	266	66	47	201	237	224	195	131	57	50
Total Tomato		15,130	15,719	16,422	15,435	15,830	19,455	21,518	42,084	52,819	109,075	30,834

NB. Conversion factor for paste/puree has changed from 5.5 to 6.0 in 2010

Table 2.2.B. Equivalent Tonnes Raw Tomato Exported

Source: - Australian Bureau of Statistics. ATPA Conversion Factors

- Japan was this year the most significant export destination, in the whole/pieces category, whereas in the previous year Japan was the second most significant export destination.
- Vietnam was the most significant export destination, in the paste/puree category, followed by New Zealand, whereas in the previous year the most significant export destination was Thailand.
- New Zealand remained as the most significant export destination in the sauce/ketchup category again this year.

Product	\$,000	% (of Tonnes)	Tonnes	\$/kg
Whole/pieces				
Total	\$777		121	\$6.43
Japan	\$449	24%	29	\$15.46
Papua New Guinea	\$51	19%	22	\$2.26
Denmark	\$19	17%	21	\$0.91
Paste/puree				
Total	\$4,152		3,642	\$1.14
Vietnam	\$1,312	28%	1,021	\$1.29
New Zealand	\$1,101	23%	835	\$1.32
Thailand	\$544	17%	605	\$0.90
Sauce/ketchup				
Total	\$8,243		4,399	\$1.87
New Zealand	\$4,381	54%	2,384	\$1.84
Japan	\$1,709	29%	1,291	\$1.32
China	\$926	6%	285	\$3.24
Juice (Litres*1000)				
Total	\$49		45	\$1.10
New Zealand	\$14	34%	16	\$0.88
USA	\$5	12%	5	\$0.88
UAE	\$5	10%	4	\$1.12

Table 2.2.C. Major Export Destinations in 2017

Source: - Australian Bureau of Statistics

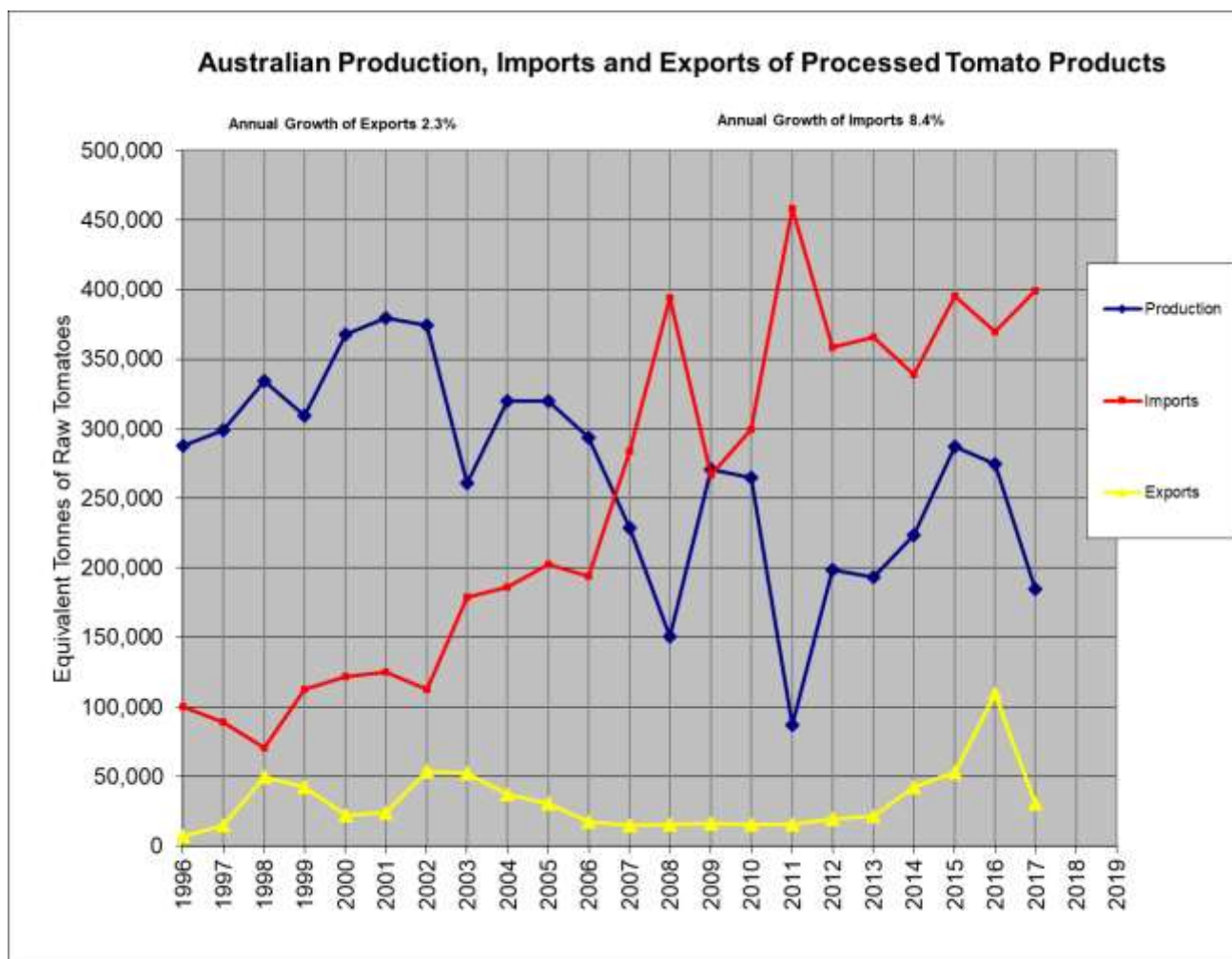
2.3 Export and Import Volumes Compared

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Exports	15,130	15,719	16,422	15,435	15,830	19,455	21,518	42,084	52,819	109,075	30,834
Imports	284,013	394,193	266,916	299,855	458,223	358,367	365,682	338,964	395,613	369,918	399,488
Net Imports	268,883	378,474	250,494	284,420	284,420	338,912	344,164	296,880	342,794	260,843	368,654
% Exports/Imports	5%	4%	6%	5%	3%	5%	6%	12%	13%	29%	8%

Table 2.3. Exports and Imports, Raw Tomato Equivalent Tonnes

Source: - Australian Bureau of Statistics. ATPA Conversion Factors

NB. Conversion factor for paste/puree has changed from 5.5 to 6.0 in 2010



Graph 2.3. Australian Production, Imports and Exports

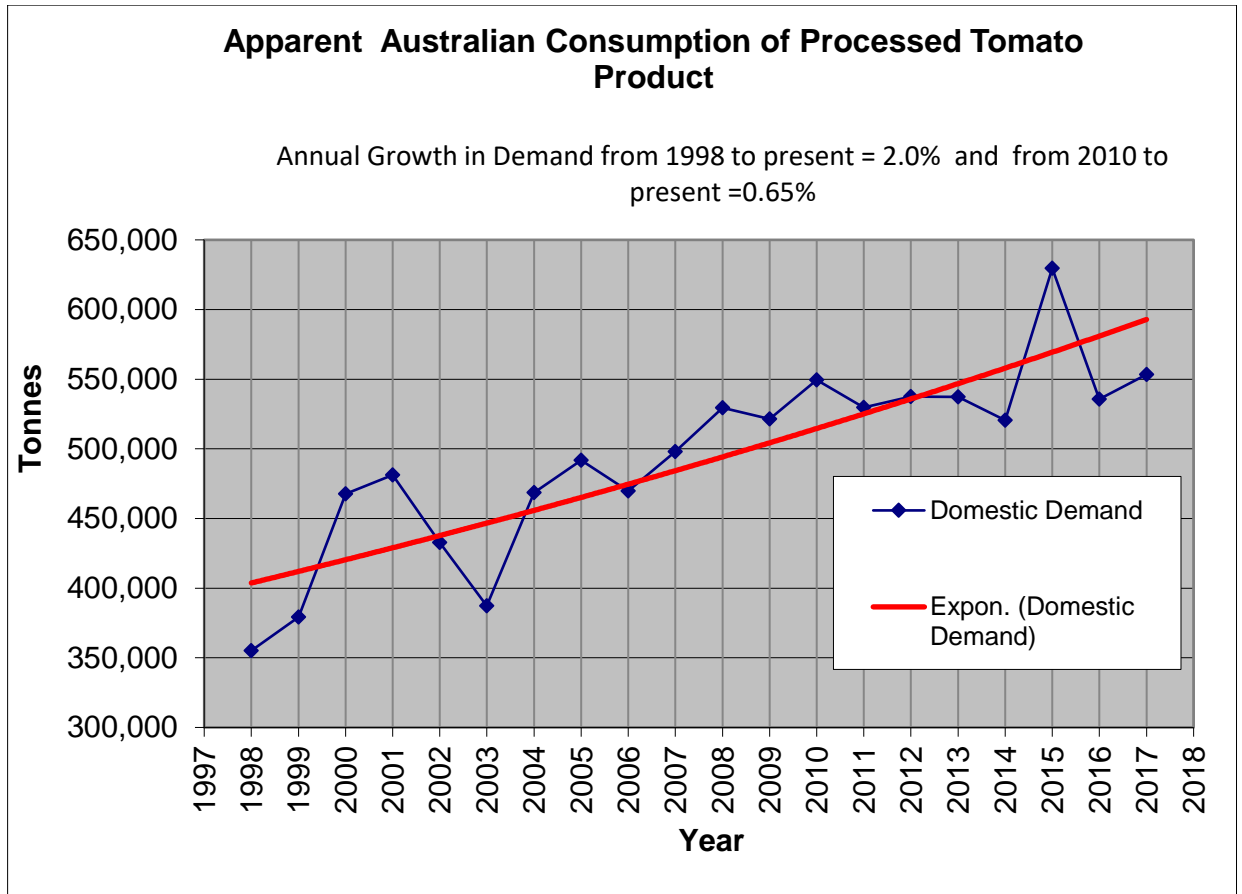
2.4 Apparent Demand for Tomato Products

Adding production and import volumes provides an idea of the apparent gross demand for Australian processed tomato. The domestic market size is this total less exports. The analysis is crude as year-end inventory levels are not known and crop years do not exactly coincide with calendar years.

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	3 Year Average
Production	229,000	150,940	271,000	264,978	87,295	198,545	193,009	223,645	286,826	274,848	184,682	248,785
Plus imports	284,013	394,193	266,916	299,855	458,223	358,367	365,682	338,964	395,613	369,918	399,488	388,340
Gross demand	513,013	545,133	537,916	564,833	545,517	556,912	558,691	562,608	682,439	644,766	584,170	637,125
Less exports	15,130	15,719	16,422	15,435	15,830	19,455	21,518	42,084	52,819	109,075	30,834	64,243
Domestic demand	497,883	529,414	521,494	549,398	529,688	537,457	537,173	520,525	629,620	535,691	553,336	572,882
Population	20,827,622	21,249,199	21,691,653	22,031,750	22,340,024	22,733,465	23,128,129	23,475,686	23,815,995	24,190,907	24,597,528	24,201,477
per capita consumption (kg/person)	23.90	24.91	24.04	24.94	23.71	23.64	23.23	22.17	26.44	22.14	22.50	23.69

Table 2.4. Apparent Demand for Processing Tomatoes (Raw Material Tonnes)

Source: - Estimate Based on Industry Survey & Horn, B (2000, 2001, 2002, 2003) and ABS



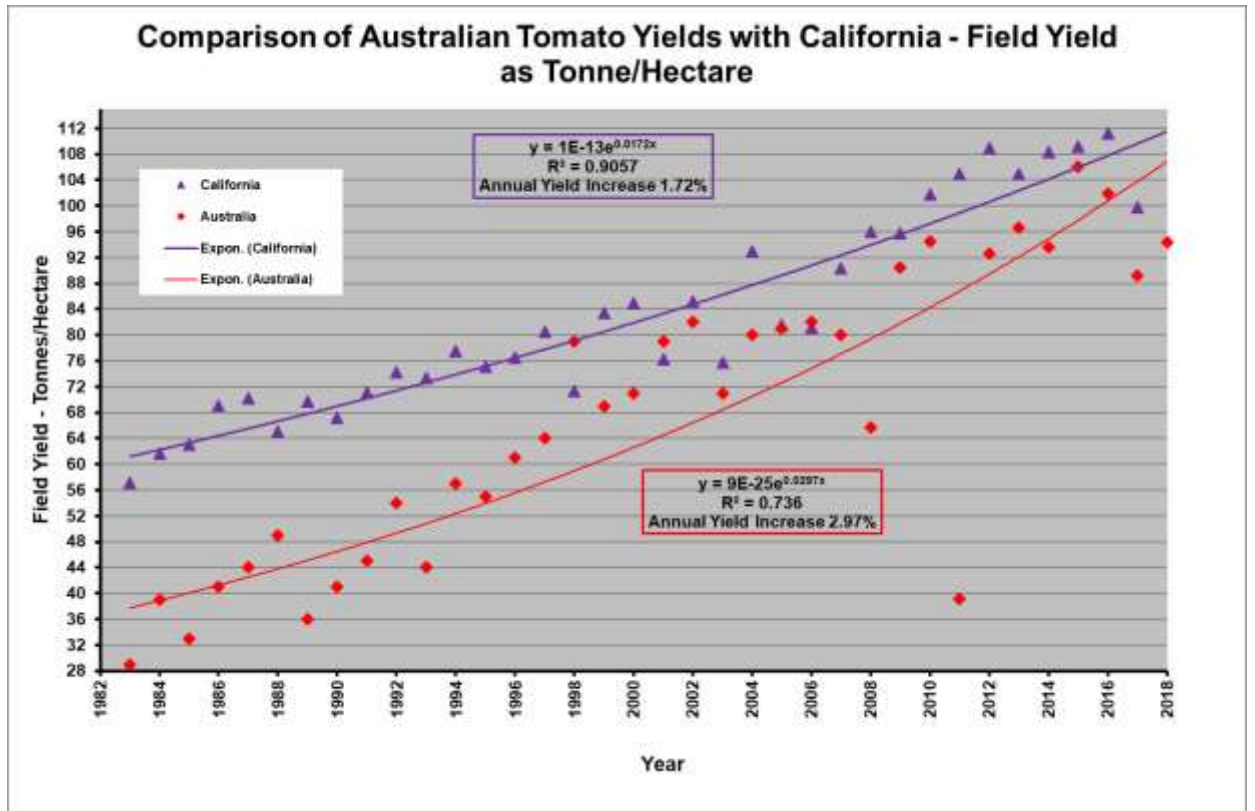
Graph 2.4. Apparent Australian Consumption of Processed Tomatoes

Although apparent Australian consumption has increased since 1998 at a rate of 2.0%, apparent Australian consumption has only actually increased since 2010 at a rate of 0.65%, although the per capita consumption did increase slightly in the past year.

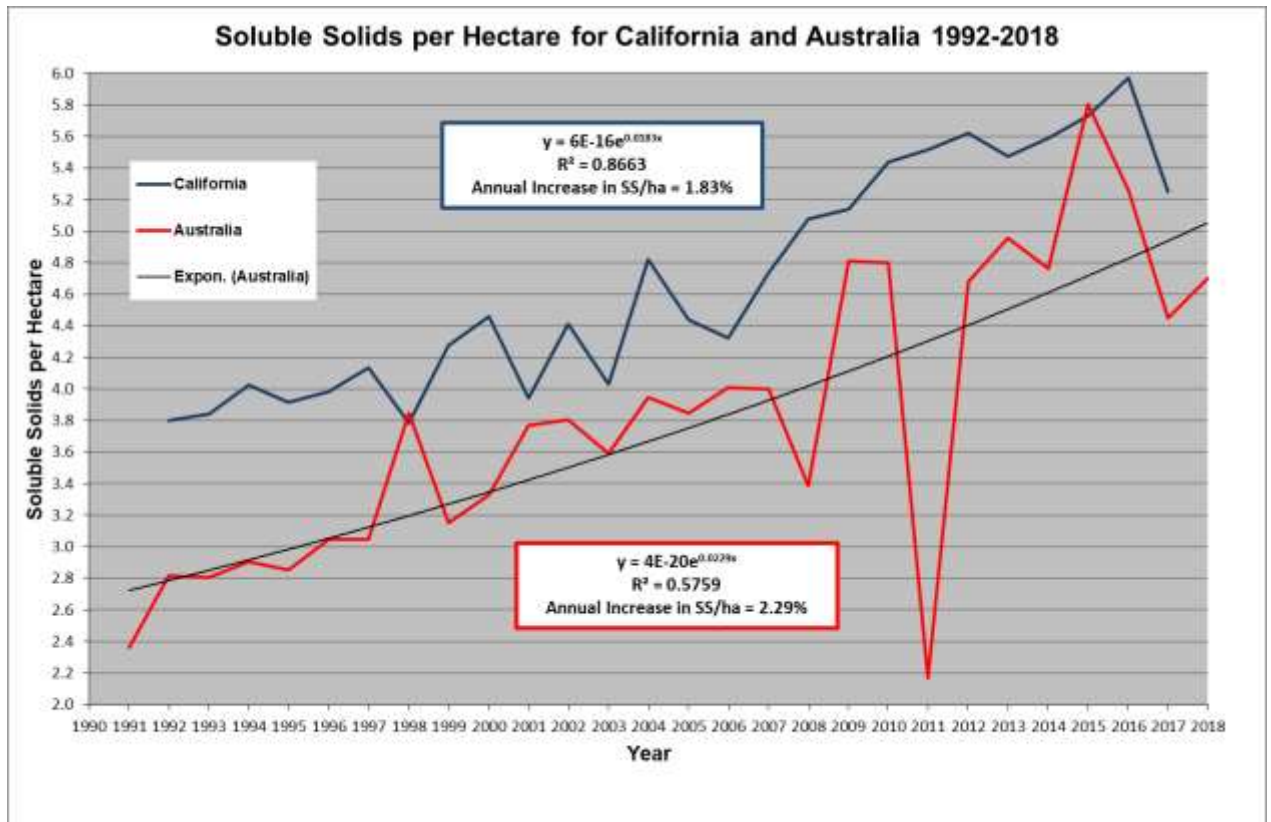
3.0 Australian and Californian Comparison

The graphs below indicate the Australian and Californian yield as both tonnes/hectare and solids/hectare. The Australian tonnes/hectare had been increasing at a rate of 1.72% per year, and the soluble solids/hectare at 2.29%.

The Australian figure for 2018, based on hectares harvested, was 94.4 tonnes/hectare at 4.89° Brix. A total of 50 hectares were not harvested this season due to factory power outage and subsequent harvest delay and were excluded from the average yield calculation for Australia.



Graph 3.0. Australian and Californian Field Yields as Tonnes/Hectare



Graph 3.1. Australian and Californian Tonnes of SS/ha

4.0 World Situation and Outlook

4.1 Global Production

This data is updated by WPTC.

2017 global processing production totalled approximately 37,797 million tonnes, down from 38,072 million tonnes in 2016.

Australia contributed only 0.49% to this total, compared to 1.35% of the world total in 2000. Australia's industry is the 23rd largest in the world and the 4th largest with a January-June harvest, down from the 3rd largest with a January-June harvest during the previous year.

Country	Season	Tonnes * 1,000			% Change	Ranking	% of Total
		2016	2017	forecast 2018	2017-18	2017	In 2017
USA	July-Dec	11,946	9,900	11,475	16%	1	26.19%
China	July-Dec	5,150	6,200	3,800	-39%	2	16.40%
Italy	July-Dec	5,180	5,200	4,650	-11%	3	13.76%
Spain	July-Dec	2,950	3,350	2,800	-16%	4	8.86%
Turkey	July-Dec	2,100	1,900	1,300	-32%	5	5.03%
Portugal	July-Dec	1,507	1,554	1,150	-26%	6	4.11%
Brazil	July-Dec	1,450	1,450	1,400	-3%	7	3.84%
Chile	Jan-June	800	1,080	1,211	12%	8	2.86%
Iran	July-Dec	1,150	980	300	-69%	9	2.59%
Ukraine	July-Dec	550	650	735	13%	10	1.72%
Tunisia	July-Dec	650	643	629	-2%	11	1.70%
Algeria	July-Dec	550	600	500	-17%	12	1.59%
Argentina	Jan-June	405	488	435	-11%	13	1.29%
Canada	July-Dec	456	426	450	6%	14	1.13%
Greece	July-Dec	440	400	320	-20%	15	1.06%
Russia	July-Dec	145	400	500	25%	16	1.06%
Egypt	July-Dec	350	300	400	33%	17	0.79%
Thailand	Jan-June	260	260	260	0%	18	0.69%
Dominican Republic	July-Dec	210	220	258	17%	19	0.58%
Israel	July-Dec	200	200	200	0%	20	0.53%
Poland	July-Dec	220	200	200	0%	21	0.53%
France	July-Dec	183	195	152	-22%	22	0.52%
Australia	Jan-June	275	185	228	23%	23	0.49%
South Africa	Jan-June	145	180	135	-25%	24	0.48%
Morocco	July-Dec	130	130	130	0%	25	0.34%
India	Jan-June	130	130	130	0%	26	0.34%
Peru	Jan-June	100	110	100	-9%	27	0.29%
Hungary	July-Dec	105	100	106	6%	28	0.26%
Syria	July-Dec	70	70	70	0%	29	0.19%
Senegal	Jan-June	28	53	53	0%	30	0.14%
Bulgaria	July-Dec	40	50	50	0%	31	0.13%
New Zealand	Jan-June	51	50	50	0%	32	0.13%
Mexico	Jan-June	40	40	40	0%	33	0.11%
Japan	July-Dec	33	30	25	-17%	34	0.08%
Czech Republic	July-Dec	25	25	25	0%	35	0.07%
Venezuela	Jan-June	20	20	20	0%	36	0.05%
Slovakia	July-Dec	20	20	20	0%	37	0.05%
Malta	July-Dec	8	8	8	0%	38	0.02%
Total		38,072	37,797	34,315			100.00%

Table 4.1.a. World Processing by Country
Source: - "WPTC" (25 October 2018)