THE TOMATO PROCESSING INDUSTRY IN SPAIN

PLANTING	JAN	FEB	**MAR**	**APR**	**MAY**	**JUN**	JUL	AUG	SEP	OCT	NOV	DEC

HARVESTING	JAN	FEB	MAR	APR	MAY	JUN	**JUL**	**AUG**	**SEP**	**OCT**	NOV	DEC

Production	2013	2014	2015
Volume of tomatoes processed (in metric tonnes)	3 028 000	1 650 000	2 700 000
Surface planted (in hectares)	31 700	20 535	27 700
Average field yield (in t/ha)	91	78	92
Average tomato price (for tomato paste in €/t field gate)	77	75	77
Number of growers	n/a	n/a	n/a
Number of processors	n/a	n/a	n/a
Trade balance			
Tomato paste (HS 200290 in metric tonnes)	172 328	194 783	241 038
Canned tomatoes (HS 200210 in metric tonnes)	136 192	148 604	131 025
Tomato sauces (HS 2103 in metric tonnes)	59 974	50 49	43 550

During the last 5 years the Spanish production has fluctuated between 1.65 and 3.03 million metric tonnes, mainly due to the changes in the market situation, but with a significant increase in processing capacity in the last years. The average production in this last 5 years has been about of 2.27 million tonnes (about 25% of the volume processed within the EU). More than 75% of the Spanish tomato products are exported, with the EU being the main destination market.

Processing tomatoes are mainly grown in the areas where the factories are located: about 70% of the tonnage in Extremadura (irrigated by the Guadiana river), a bit more than 20% % in Andalusia, 7% in the Ebro Valley (Navarra, Rioja and Aragon), and the rest in other areas like Toledo, Ciudad Real, Murcia, etc Spain as a whole has a long processing season: It starts in the first weeks of July in Andalucía (south) and finishes end of October/early November in the Ebro Valley (North).

The characteristics of each of the 3 major production areas are as follows:

1 - Extremadura: about 70 % of the total tonnage

Silty soils with varying sand content. Little risk of frost in the planting period. High temperatures in July with some risk of blossom drop. With a good water holding capacity of about 8,000 hm^3, no serious drought has been suffered since 1995.

Producers are mainly organised in producer organisations (OPFHs) which sign about 90% of the contracts with processors. 100% of the fields are planted with plug-seedlings. Most of the fields use drip irrigation (93% distributed as follows: 79% conventional irrigation system drip and 14% buried drip system), with furrow irrigation constantly reducing (7% currently). Harvesting usually begins by 20 -25 July. The fields are still rather small although the tendency is to increase every year and about 60-70% are rented. Average yields have been about 85 -90 /ha in the last years. There are several big factories producing mainly tomato paste, but also diced tomatoes and sauces are produced in the region. Extremadura is also the world largest manufacturer of tomato powder. Some of the big cooperatives have set up their own processing plants in the last decade and now processed about 35% of the total production in the region.

2- Andalusia: more than 20 % of the total tonnage

South of Extremadura, a new area of production was developed in the early 1990's, around Lebrija in Andalusia, near Seville, and more factories were installed there during the last decade. In the last three years the installed capacity and production have raised sharply. Growers using drip irrigation obtain yields exceeding 105 t/ha on average. In the past they have suffered some drought problems, but not in the last years. The production is mainly tomato paste.

3 - The Ebro Valley: 7% of the total tonnage

The soils here are silty and, due to the weather conditions, the crops are later than in Extremadura. There is some risk of late frost in April and the fall can be wet. 100% of the fields use drip irrigation and the size of the plots is relatively bigger than in Extremadura. Harvest generally begins in the second week of August, and if the fall is dry, it can continue until the end of October. The use of plug-seedling transplants is generalized. Average yields are about 80-85 t/ha. Many processing firms in the region have specialized their operations around whole peeled tomatoes, but also in the production of "tomate frito", a Spanish speciality.

WPTC member (through AMITOM): AGRUCON

The trade association AGRUCON represents most private tomato processing companies in Spain.

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