

AUSTRALIAN PROCESSING TOMATO RESEARCH COUNCIL

ANNUAL INDUSTRY SURVEY

2022



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1 Executive Summary

The annual industry survey provides a year-on-year comparison, detailing industry performance in the current year compared with the previous one.

The data also tells the 'story' of Australian production and international trade over a longer period of time, supporting analysis of where the industry is headed, for example in terms of growers, production, and location.

In previous iterations of this survey, the long-term perspective has been portrayed by APTRC to get a more complete, historical idea of the industry's trajectory. This could create the impression that the processing tomato industry is in continuous decline, of grower numbers, total growing area, and total production.

When focus shifts to the past 10 years however, the story looks vastly different to the decades long perspective and describes a resilient and robust industry. The shorter reference period also allows us to better see the subtleties of the last 10 years, which are sometimes missed within the larger range of figures.

Over recent years, the data portrays how industry has managed to stabilise its production levels in terms of average yields and soluble solids. It shows that the industry maintains production each season around the 200,000-tonne mark (climate notwithstanding) with a reasonably stable core group of specialized tomato growing enterprises and processors. The industry over the past 10 years demonstrates how it consistently manages to harvest and process over 90% of its planted area every season, which is impressive considering the challenges faced by growers and processors to coordinate growing schedules and harvest delivery operations.

During the 2021/2022 season, twelve growers produced 226,439 tonnes of processing tomatoes, a slight decrease on the volume grown in 2020/21, and the crop was again processed by three companies.

Some 2480 hectares were planted, with total use of sub-surface drip irrigation. The use of transplants decreased slightly to 85% of the total area under production, with seeded tomatoes making up the remaining 15%.

In 2021/22, the Australian processing tomato industry achieved an average yield/ha of 99.1 tonnes and 93% of planted area was harvested, which was a less than ideal outcome. However, considering the difficult harvest period, these figures still demonstrate the overall robust nature of Australian growers, and their ability to grow high performing and resilient crops.

Soluble solids averaged 5.1%, which continues the trend of recent years where solids have been consistently above the 5.00% benchmark. These impressive solids figures are a combination of good cultivars (often selected from the APTRC field trial program) and good crop management (a testament to the core grower skill level in irrigation, nutrition and overall crop husbandry).

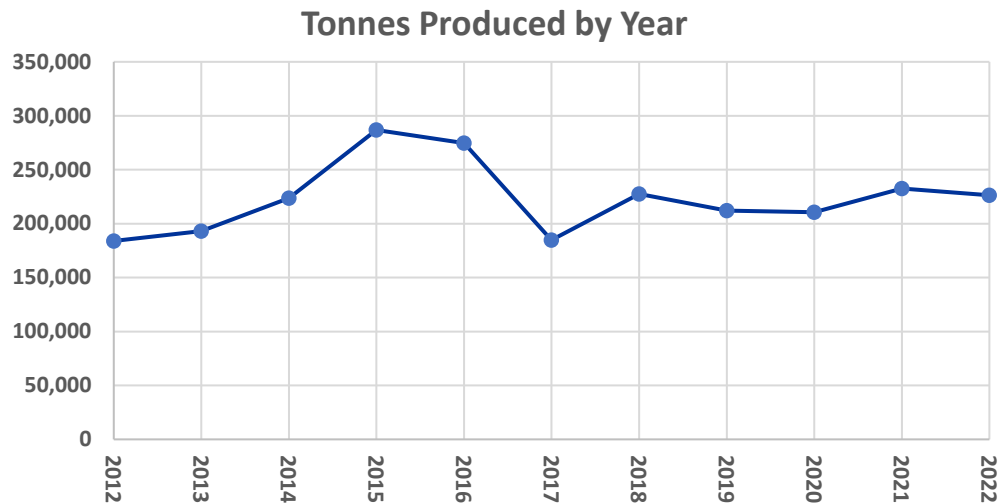
On the international scene, imports of processed tomato products into Australia decreased during the 2021 calendar year but are still at an elevated level compared to previous years. Exports of Australian processed tomatoes increased in 2021, and now, when viewed on a raw tonne equivalent basis, represent about one quarter of all Australian production.

Total Australian domestic consumption dropped slightly in 2021, however it was supplied by an increased percentage of local product, which is beneficial for Australian processors. Ideally a trend toward domestic consumption of more local product will continue in the coming years.

After a spike in 2020, Australian consumers returned to their long-term average consumption of 23 kg/capita of processed tomato products, in equivalent raw weight. On a positive note, this figure remains among the highest consumption of tomato products per capita in the world.

2 Industry Size

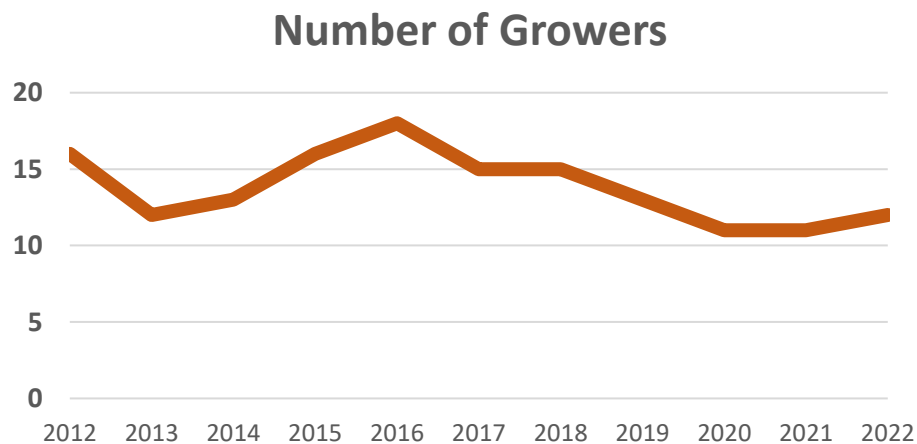
2.1 Volume



2.1.1 Paid tomato volumes delivered (tonnes) (APTRC)

Growers produced 226,439 tonnes of processing tomatoes during the 2021/22 season, with the bulk of demand coming from the two major processing operations in Australia. Contained in the total production figures are organically grown tomatoes, which contributed 3,901 tonnes of produce (an increase on the previous season), as well as 357 tonnes of cherry tomatoes.

2.2 Producers



2.2.1 Number of growers (APTRC)

Grower number increased to 12 specialist businesses for the 2021/22 processing tomato season, spread mainly across Northern Victoria, with a lesser number growing in Southern NSW.

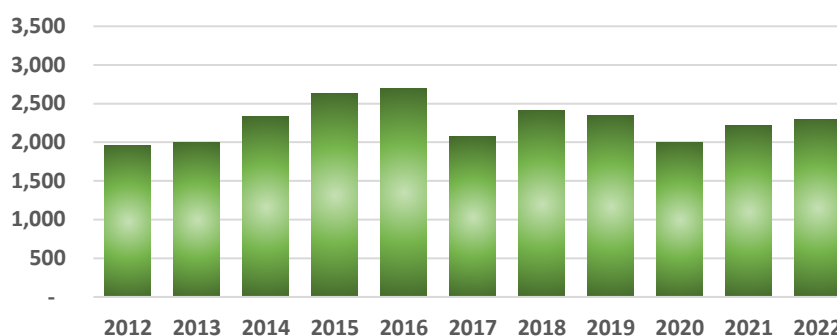
2.3 Processors

As in the previous season, the crop was processed by three businesses, with Kagome (79%) and SPC (19%) taking most of the harvest.

3 The Crop

3.1 Area and management

Production Area (ha)



3.1.1 Planted production area (ha) (APTRC)

The area under production increased to 2,478 hectares, of which 93% was harvested. The larger area planted this season reflected the growth in global demand as well as increased capacity in Australia from some growing enterprises.

Season	Transplanted	Seeded
2010/11	79%	21%
2011/12	81%	19%
2011/13	72%	28%
2013/14	59%	41%
2014/15	68%	32%
2015/16	69%	31%
2016/17	86%	14%
2017/18	88%	12%
2018/19	91%	9%
2019/20	86%	14%
2020/21	90%	10%
2021/22	85%	15%

3.1.2 Proportions of transplants Vs seed by area grown (APTRC)

This season, the crop was again fully grown under sub-surface drip irrigation, which is likely to remain the status quo for the Australian industry.

There was an increase in the proportion of seeded crop grown this season, due to an increase in production in the Boort region in Victoria. The Boort region is still the only area direct-seeded and represented 15% of the total industry by area in 2021/22.

Area and Production by State	VIC	NSW
Area Planted	71.0%	29.0%
Tomato Volume Processed	75.4%	24.6%

3.1.3 Production by State (APTRC)

In the 2021/22 season, NSW contributed 24.6% of the total volume processed but accounted for 29% of the total area planted. There are many reasons why the planted area totals and production levels may not align exactly by state; including time of harvesting, yield potential of the growing system, soil type and of course the vagaries of climate influence across the season.

3.2 Yield

Season	Area (Ha)	Area (Ha)	Area %	Average Yield	Major Seasonal Challenges
	PLANTED	PROCESSED	HARVESTED	MT/ha	
2012/13	1999	1998	100%	96.6	Wet, late harvest
2013/14	2386	2330	98%	93.6	Wet, late harvest
2014/15	2700	2635	98%	106.1	Early crop failure
2015/16	2782	2697	97%	101.9	Poor crop stand, delayed harvest, over-contract fruit
2016/17	2183	2071	95%	89.2	Delayed harvest due to rain
2017/18	2457	2407	98%	94.4	Abandoned due to factory power outage and resulting delay
2018/19	2347	2347	100%	90.3	Extreme bacterial speck, high temperatures
2019/20	2073	2003	97%	105.1	Hot and windy during growing; late harvest rains
2020/21	2215	2215	100%	106.13	Dry start, strong winds mid spring, some hail, mild summer
2021/22	2480	2300	93%	99.1	Delays from staff scarcity and crops abandoned due to wet finish

3.2.1 Average yield, harvest conditions (MT/ha) (APTRC)

The 2021/22 season saw a decrease in overall yield average. This was due primarily to delayed harvests. In the first instance, the harvest delays were due to a slower than ideal harvest resulting from stilted processing operations and harvesting complications. This was due in large part to the great challenge faced by all of horticulture in 2021/22, which was a lack of available itinerant and local seasonal staff. In the second instance, rainfall from mid-April onwards further delayed harvest operations and ultimately left 180 ha of crop in the field.



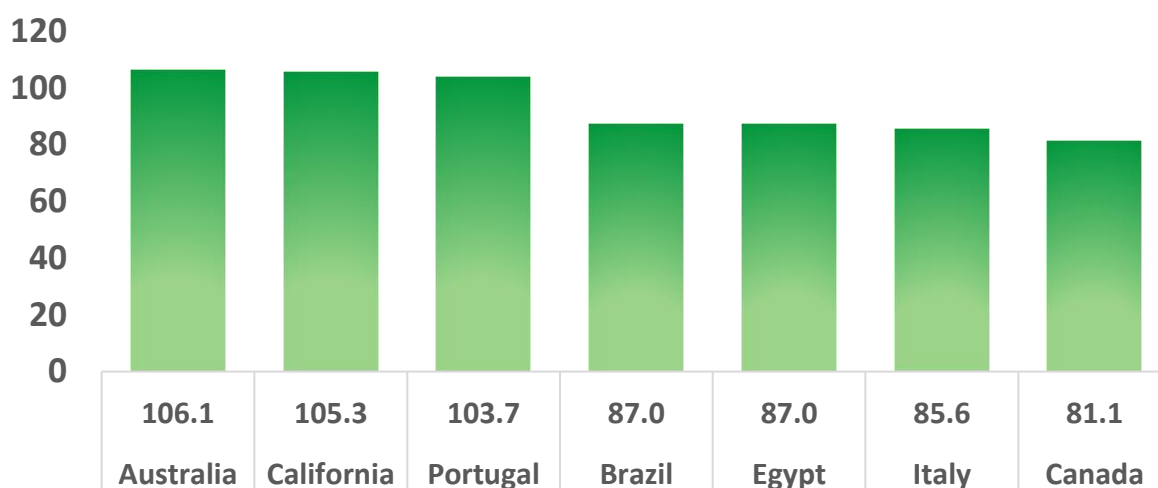
3.2.2 Average yield (t/ha) (APTRC)

Even with the challenge of labour and seasonality, the industry recorded an average yield of 99.1tonnes per ha, which by global standards is still an exemplary outcome.

The industry has been aiming to shift the harvest schedule to earlier in the season, with the goal of avoiding harvest delays and minimising the chance of abandoned crops due to overripe fruit or poor paddock conditions. With the pandemic-related staffing issues in seasonal labour largely past us now, hopefully the harvest recovery will return to near 100% in the coming seasons.

The industry is focussed on ever higher yields and solids to stay competitive internationally and to maintain grower profitability and sustainability. The ongoing annual industry cultivar evaluation trials and research into root disease are just some of the current actions the APTRC and the Australian processing tomato industry are undertaking to help achieve ever higher yield outcomes.

2021 Yield - Global Comparison - MT/ha



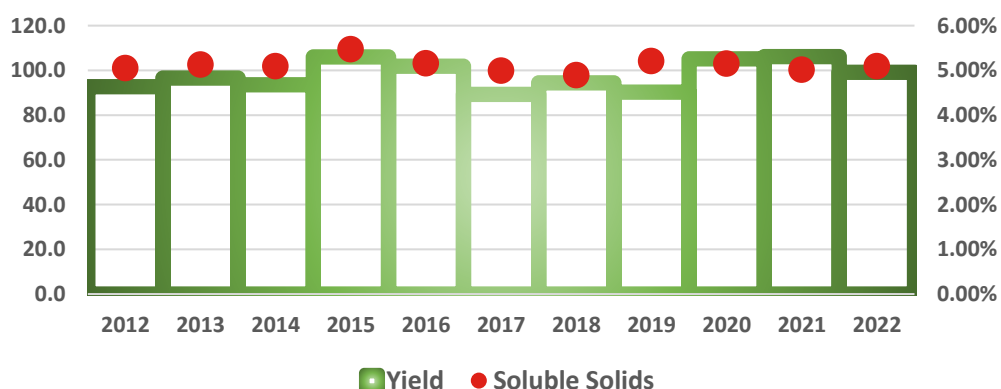
3.2.3 2021 average yield (MT/ha), by country (Colvine)

Note: To get the most accurate global comparison, the data for international production is always a season behind and as such in this report represents the previous season (2020/2021). This is due to the availability of data from the Northern Hemisphere annualised results.

Australia achieved a record high of 106.13 tonnes per ha in 2021, which was slightly above figures for California and Portugal. Brazil, Egypt, Italy, and Canada were all close behind with strong industry averages.

3.3 Soluble Solids

Yield (MT/ha) and Soluble Solids (%)



3.3.1 Soluble solids (%) and yield (t/ha) (APTRC)

Average soluble solids for the season were 5.1%, which is above the minimum benchmark of 5.0% preferred by processors. The past decade of results shows that the minimum soluble solids benchmark is being met (or very close to it) every season.

3.4 Cultivar

CULTIVARS	Percentage of Total Area Grown	
	2021/22	2020/21
H3402	35.0%	18.5%
UG19406/UG16112	16.1%	14.6%
H1015	8.2%	9.0%
H1311mix	8.1%	16.7%
H3402mix	7.6%	17.0%
H1014	4.6%	5.6%
UG4014	4.0%	0.3%
SVTM9024	3.3%	0.0%
SVTM9000	3.1%	0.5%
H1311	2.5%	5.6%
H3406mix	2.4%	0.0%
H1301	2.1%	0.0%
H3406	1.5%	0.0%
UG16112	1.0%	0.6%
TCP94829 (Cherry Tomatoes)	0.3%	0.0%
HM58811	0.2%	0.0%
H1175mix	0.0%	7.8%
H4401	0.0%	3.3%
H1428	0.0%	0.3%

3.4.1 Cultivar by proportion of total area

When comparing the 2020/21 and 2020/21 seasons, there were some significant shifts in the balance of cultivars grown by area. Many factors influence the dominance of cultivars being grown from season to season and may reflect a change in bias toward customer requirements, upgrading of processing infrastructure, new market access or loss of previous markets, seasonal harvesting logistics and agronomic suitability to growing region and soil type.

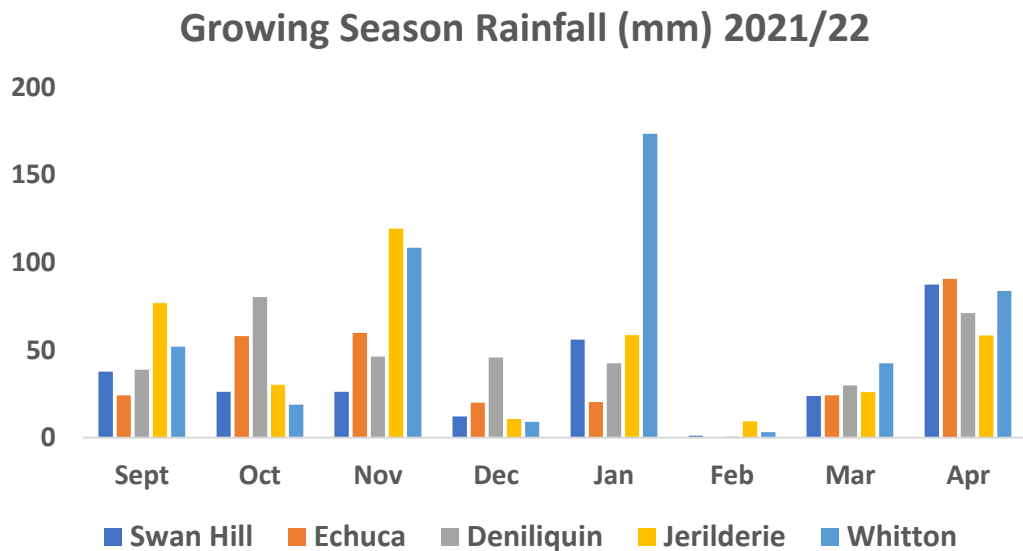
One major example of this in the 2021/22 season was a shift away from the blending of cultivars in field to attain a desirable processing outcome. With the introduction of alternative processing techniques, the mixing of cultivars has become less important and hence more straight lines of product were planted.

The other notable observation from these trials is that the range of varieties being grown increased, which in part shows the industries commitment to testing more varieties on a commercial scale.

The industry is still being heavily challenged by seed availability. The main issues are related to unwanted viroids being detected in seed destined for Australia, delays from laboratory analysis and more expensive testing and import biosecurity protocols. Seed shortages in certain cultivars have also influenced the balance of crop area grown by cultivar and been a significant factor in shaping the figures in the table above.

4 The Season

4.1 Rainfall

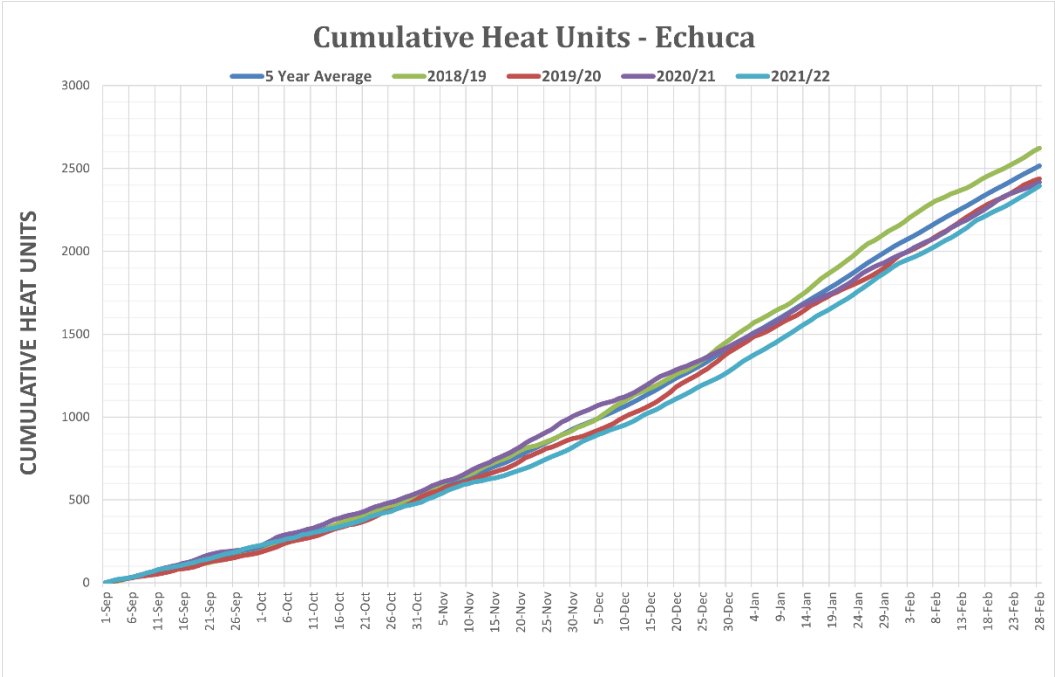


4.1.1 Rainfall across the major growing regions (mm) (BOM)

As seen in the above chart, for most regions, rainfall was moderate for the start of the season and as such close to ideal, with planting and sowing operations running from late September to late November. December was dry across all areas, however the most northern grower (Whitton region NSW) experienced high rainfall in the January period, which put extra strain on the start of harvest. The Appin and Jerilderie region (ref. Swan Hill and Jerilderie) also recorded high rainfall events, putting late season disease pressure on maturing plants.

There was almost no rainfall in February, which helped processors get off to a relatively good start. However, the delays in processing and harvest operations due to staffing challenges, coupled with frequent rainfall from mid-April onwards, meant harvest was significantly and negatively impacted late in the season.

4.2 Heat Units



4.2.1 Heat units – Echuca (BOM)

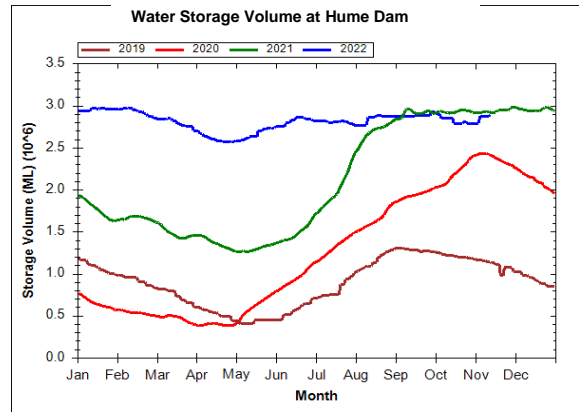
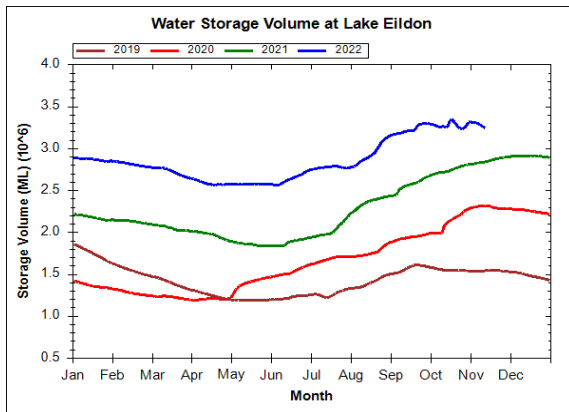
The heat units recorded during the major crop growth period demonstrate that the season was cumulatively milder than the previous 5-year average and indeed the last 4 individual growing seasons.

This mild weather seemed to delay crops early in the season, which was difficult for our early industry plantings, however the lack of heat stress during December and January meant crops were looking outstanding in many regions. However, the harvest delays ultimately impacted quality and tested the field storage attributes of cultivars to their limits.

Although this graph uses data from Echuca, it's a central point for industry and can be generally considered indicative of what was experienced by growers in surrounding regions.

Early climate indicators suggest that the season ahead will be wetter than average and mild once again, so delayed harvest schedules are to be expected in 2022/23.

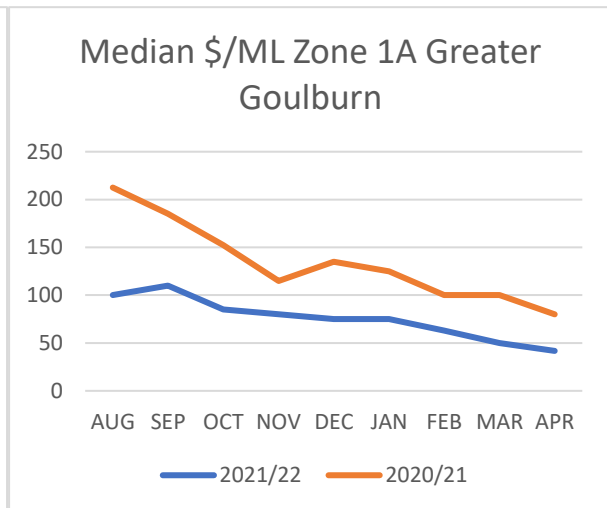
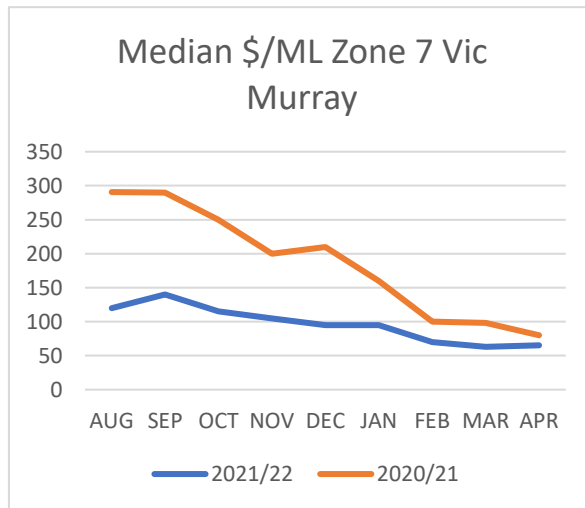
4.3 Water Storages



4.3.1 Storage Volume, Lake Eildon and Hume Dam (GMW)

The water storages across all catchments have remained high or increased significantly throughout the calendar year due to high inflows from the persistent La Niña climate conditions. The cost of water will be low throughout the 2022 growing season and due to the quantum of water in storages, availability should be relatively stable for at least the next few seasons.

4.4 Water Price



4.4.1 Zone 1A and Zone 7 median water price (\$/ML) (Registry)

The price of water during 2021/22 remained low and the price of water could be seen as a direct reflection of higher allocations and inflows into major water storages for Victoria and NSW during this period.

The outlook for the 2022/23 season is for higher rainfall and average to lower temperatures, so water prices are predicted to remain suppressed for at least another season.

5 Trade

5.1 Imports

Product	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Dried/powder	39,155	39,125	35,940	26,875	34,506	37,934	37,660	34,880	28,017	29,143
Whole/pcs <1.14L	49,173	48,060	42,660	45,222	40,965	43,354	42,683	41,799	51,121	36,356
Whole/pcs >1.14L	18,661	18,911	28,402	28,088	22,997	24,002	24,275	22,369	21,129	21,316
Paste/puree<1.14L	73,484	80,602	83,976	153,210	102,733	107,923	109,578	110,328	159,447	137,971
Paste/puree>1.14L	148,728	145,214	109,242	102,866	130,171	140,532	144,906	133,524	143,118	140,502
Juice [1]	264	137	116	75	83	38	75	50	30	17
Sauce/ketchup	28,902	33,633	38,628	39,276	38,462	45,705	45,946	47,050	48,375	45,788
Total Tomato	358,367	365,682	338,964	395,612	369,917	399,488	405,123	389,999	451,236	411,093

5.1.1 Imports of Tomato Products (equivalent raw tonnes) (ABARES)

The volume of imports decreased quite significantly during 2021, with most of the decrease coming from the 'paste/puree' categories and small pack size 'whole/pcs' category.

The largest importing countries, sorted by category were as follows (where the major importer supplied less than 90% of the total, the next most significant supplier/s are also included).

- **Dried/powder** – Turkey 51.3%, New Zealand 11.67%, China 11%
- **Whole/pcs <1.14L** – Italy 96.51%
- **Whole/pcs >1.14L** – Italy 97.05%,
- **Paste/puree<1.14L** – Italy 81.89%, China 14.92%
- **Paste/puree>1.14L** – USA 44.25%, China 25.14%, Italy 20.01%
- **Juice** – USA 35.15%, Georgia 18.25%, Mexico 17.8%
- **Sauce/ketchup** – Italy 39.42%, New Zealand 24.14%, Netherlands 12.01%

At 68% of total volume (last year 70%), Italy remains the dominant source of imported processed tomato products into Australia. The next largest suppliers were China and the USA, who both provided approximately 10% each of total product into Australia.

Product	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Dried/powder	4.48	4.83	5.32	5.98	5.33	5.61	5.77	5.69	6.22	5.42
Whole/pcs <1.14L	0.94	0.99	1.16	1.17	1.22	1.10	1.17	1.26	1.39	3.02
Whole/pcs >1.14L	0.72	0.83	0.99	0.99	0.92	0.89	0.97	1.00	1.00	2.05
Paste/puree<1.14L	1.05	1.13	1.35	1.36	1.34	1.27	1.27	1.40	1.56	1.54
Paste/puree>1.14L	0.85	0.86	1.05	1.27	1.14	1.08	1.15	1.24	1.31	1.20
Juice [1]	0.99	0.91	1.22	1.54	0.88	2.37	1.79	1.87	3.09	3.31
Sauce/ketchup	0.49	1.44	1.62	1.71	1.73	1.75	1.78	1.91	2.19	2.15
Total Tomato	0.90	1.09	1.27	1.31	1.31	1.26	1.32	1.42	1.54	2.11

5.1.2 Average import prices (\$/kg), in 2021 monetary values (ABARES)

5.2 Correlation of Imports and Price

- The price for imports for 2021 increased significantly, which seems to align with surging inflation and commodity price indicators worldwide as well as the effects of the pandemic and high global shipping charges.
- There was a moderately strong correlation across the past 10 years for Juice and the Sauce/ketchup categories.
 - o Juice exhibits a negative correlation, meaning as price goes up, imports go down.
 - o Sauce/ketchup exhibits a positive correlation, so as price goes up, imports also increase.
- The exchange rate correlation over the past 10 years has shown a moderately negative correlation overall. This indicates that it's likely as exchange rates go up, Australian imports decrease, which seems to be the scenario for the 2021 calendar year.
- The other correlations for imported product are quite varied and swing from moderately positive to moderately negative and deviate within different package sizes within category groups. Therefore, it suggests that overall, the variability in imported volumes does not appear to be strongly price driven for most categories.

5.3 Exports

Product	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Whole/pieces	1,581	1,075	2,552	746	461	133	62	139	623	273
Paste/puree	11,492	14,987	33,800	43,747	104,518	21,852	16,402	11,695	32,766	38,323
Sauce/ketchup	4,134	3,218	3,524	8,196	4,039	8,799	11,636	13,227	14,788	17,986
Juice [1]	237	224	195	131	57	50	80	106	52	47
Total Tomato	19,456	21,517	42,084	52,819	109,075	30,834	28,180	25,167	48,228	56,629

5.3.1 Exports of tomato products (ABARES) (equivalent raw tonnes)

The volume of exports increased substantially again in 2021, most noticeably in the paste/puree and sauce/ketchup categories.

The largest export markets, sorted by category and then by country were as follows:

- **Whole/pieces** – Thailand 45%, New Zealand 13%, USA 13%
- **Paste/puree** – Japan 58%, New Zealand 18%, Vietnam 16%
- **Sauce/ketchup** – New Zealand 50%, Japan 25%, China 14%
- **Juice** – New Zealand 56%, Fiji 11%, Singapore 7%

At 36% of all products, Japan has become the new major export destination for Australian processed tomato produce, with New Zealand close behind at 38% and China at 8% of total exports.

Product	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Whole/pieces	3.08	3.46	1.36	4.26	5.29	6.89	4.90	2.69	1.74	3.03
Paste/puree	1.46	1.46	1.45	1.33	1.03	1.22	1.46	1.85	2.32	2.16
Sauce/ketchup	3.00	2.87	2.72	2.68	2.82	2.01	2.05	2.09	2.40	2.06
Juice [1]	1.51	1.27	1.28	1.33	1.66	1.17	1.78	1.08	1.10	1.02

Total Tomato	2.44	2.25	1.65	1.95	1.30	1.73	1.88	2.03	2.34	2.12
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5.3.2 Average export prices (\$/kg) (ABARES), in 2021 monetary values

The real price of exports decreased slightly in 2021, which is less than ideal for Australian industry.

The data suggests a moderate or weak negative correlation between average export price and volume variability, meaning that as price goes up, volume goes down. This applies to all product categories, except for Juice, which consistently appears to have no correlation to export price whatsoever.

It's worth noting that there is a moderate, but not a strong, negative correlation between export volumes and the USD exchange rates across the last 10 years, meaning that as exchange rates decrease, exports increase and vice versa. The fact that it is only a moderate correlation may suggest that exports from Australia aren't heavily dictated by exchange rates and that other market forces are having more influence on the annual export opportunities.

5.4 Market Demand

Calendar Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	5 Yr	10 yr
Imports	358,367	365,682	338,964	395,613	368,918	399,488	405,123	389,999	451,236	411,093	411,388	388,448
Net Australian	164,505	171,491	181,561	234,007	165,773	153,848	199,456	186,794	162,249	175,933	175,656	179,562
Dom Demand	522,872	537,173	520,525	629,620	534,691	553,336	604,579	576,793	613,485	587,025	587,044	568,010
Imported %	69%	68%	65%	63%	69%	72%	67%	68%	74%	70%	70%	68%
Local %	31%	32%	35%	37%	31%	28%	33%	32%	26%	30%	30%	32%
Per capita (kgs)	23	23	22	26	22	22	24	22	24	23	23	23

5.4.1 Apparent domestic market demand (ABARES) (equivalent raw tonnes)

Table 4-3 represents the Australian market demand for processed tomato products and shows how this demand is being met, i.e., from local or imported products.

For individual years, combining data can produce non-matched results; ABARES data is based on a calendar year, rather than a seasonal year, and this survey is unable to account for year-end stocks. However, these factors should tend to be mitigated when viewed over time, such as the 5-year or 10-year averages.

Considering this data, the following may be noted:

- **Imports:** Imports decreased quite significantly in the 2021 calendar year.
- **Net Australian:** The net Australian figure was higher than the previous calendar year and equates to tomatoes processed, less exports. This increase means that a greater volume of locally grown and processed product was used for domestic consumption than in the previous year.
- **Domestic Demand:** After the high of 2020, domestic demand for processing tomato products has scaled back, which is likely just a return to 'normal' demand levels.
- **Imported %:** The imported percentage of processed tomato products decreased in 2021, which is always positive to see from an Australian grower/processor perspective. Ideally, we would like to see this figure decrease further in the future, as more Australian produce meets local demand.
- **Local %:** The percentage of local product sold in the Australian market increased in 2021, which is a desirable outcome.

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- **Per Capita kgs:** The average per capita consumption fell in 2021 and now aligns with the 5 and 10-year average consumption of 23 kilograms of equivalent raw tomatoes. It was hoped that the consumption would remain high after a significant increase in 2020, however this does not seem to be the case.

By comparison, in 2019/20 US consumption was 21.7 kilograms and Europe (Non-EU) was 18.8 kilograms and Western EU consumption was 17.3 kilograms (Branthôme).

6 Global Industry

6.1 Production

In 2021, recorded global production totalled 39.184 million tonnes, compared to 38.402 million tonnes the previous year; an increase of 2.04%.

In 2021, Australia contributed 0.6% of global production and maintained its ranking at 18th for industry volume.

Country	Season	2020	2021	2022E	% Change 2021-22E	Ranking 2021	% Total 2021
USA	Jul-Dec	10,721	10,223	9,975	-2%	1	26.1%
Italy	Jul-Dec	5,166	6,059	5,480	-10%	2	15.5%
China	Jul-Dec	5,800	4,800	6,200	29%	3	12.2%
Spain	Jul-Dec	2,650	3,185	2,100	-34%	4	8.1%
Turkey	Jul-Dec	2,500	2,200	2,350	7%	5	5.6%
Portugal	Jul-Dec	1,262	1,596	1,330	-17%	6	4.1%
Brazil	Jul-Dec	1,421	1,525	1,500	-2%	7	3.9%
Iran	Jul-Dec	1,300	1,300	1,300	0%	8	3.3%
Chile	Jan-Jun	907	1,174	971	-17%	9	3.0%
Algeria	Jul-Dec	800	1,000	800	-20%	10	2.6%
Tunisia	Jul-Dec	961	940	610	-35%	11	2.4%
Ukraine	Jul-Dec	800	800	120	-85%	12	2.0%
Argentina	Jan-Jun	454	596	626	5%	13	1.5%
Russia	Jul-Dec	515	523	638	22%	14	1.3%
Egypt	Jul-Dec	420	440	440	0%	15	1.1%
Greece	Jul-Dec	420	420	340	-19%	16	1.1%
Canada	July-Dec	438	399	535	34%	17	1.0%
Australia	Jan-Jun	210	233	227	-3%	18	0.6%
Dominican Republic	Jul-Dec	181	227	227	0%	19	0.6%
Israel	Jul-Dec	200	200	200	0%	20	0.5%
Poland	Jul-Dec	175	175	175	0%	21	0.4%
France	Jul-Dec	136	164	142	-13%	22	0.4%
India	Jan-Jun	152	162	162	0%	23	0.4%
South Africa	Jan-Jun	150	125	120	-4%	24	0.3%
Peru	Jan-Jun	100	120	125	4%	25	0.3%
Hungary	Jul-Dec	82	115	80	-30%	26	0.3%
Morocco	Jul-Dec	100	100	100	0%	27	0.3%
Senegal	Jan-Jun	73	73	73	0%	28	0.2%
New Zealand	Jan-Jun	50	50	52	4%	29	0.1%
Syria	Jul-Dec	42	40	40	0%	30	0.1%
Thailand	Jan-Jun	40	40	40	0%	31	0.1%
Mexico	Jan-Jun	40	40	40	0%	32	0.1%
Bulgaria	Jul-Dec	40	40	40	0%	33	0.1%
Japan	Jul-Dec	23	28	27	-4%	34	0.1%
Czech Republic	Jul-Dec	25	25	25	0%	35	0.1%
Venezuela	Jan-Jun	20	20	20	0%	36	0.1%
Slovakia	Jul-Dec	20	20	20	0%	37	0.1%
Malta	Jul-Dec	8	7	7	0%	38	0.0%
Total		38,402	39,184	37,257	-5%	38	100.0%

6.1.1 World Production by Country ('000 tonnes) (Colvine)

6.2 Outlook

- It is currently anticipated that production will decrease in 2022 by 5%, due to a range of undesirable global and climatic influences.
- Australia has initially forecast a reasonable rise in production for 2022/23: with the primary estimate of 241,000 tonnes, which includes small amounts of organic and cherry tomatoes. However, at the writing, the early season has been hampered by persistent rainfall and flooding and this figure will likely be revised down by the end of planting.

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