

The U.S. Processed Tomato Industry Situation

**Horticultural & Tropical Products Division
Foreign Agricultural Service**

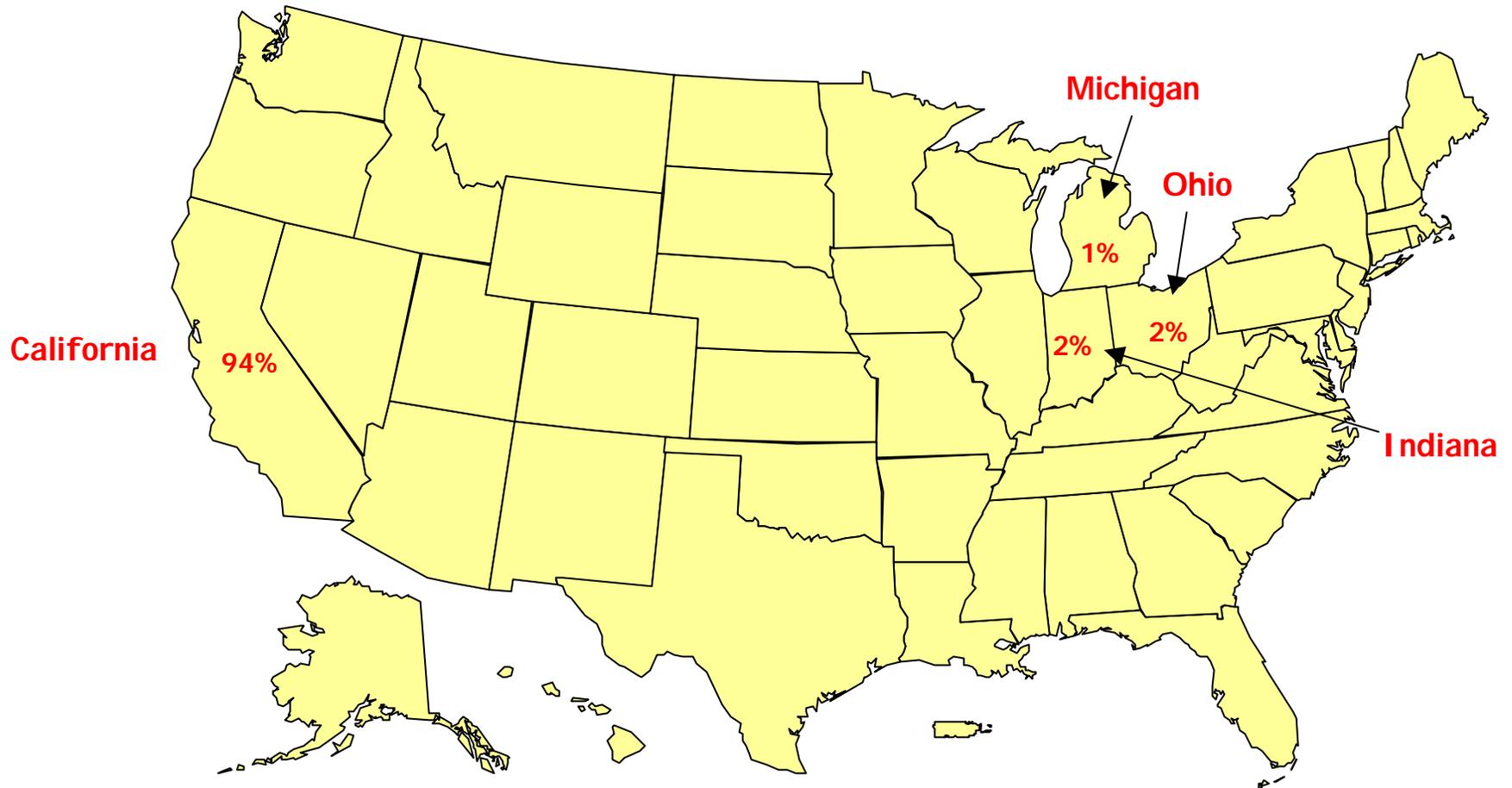


June 2002

U.S. Processed Tomato Facts

- California accounts for approximately 94% of the U.S. processing tomato output.
- Most tomatoes grown for processing are produced under contract between growers and processing firms.
- Processing tomatoes are machine-harvested while all fresh-market tomatoes are hand-picked.
- Fresh-market tomato prices are typically higher and more variable than processing tomato prices due to larger production costs and greater market uncertainty.
- Among the 13 leading processing vegetables (excluding potatoes, pulses, and mushrooms), tomatoes have the highest associated value, accounting for 53 percent of the \$1.7 billion in 1999 farm value.
- Processors estimate contracted production for 2002 will total 10.1 million metric tons and come from 289,000 acres producing an average of 36.33 tons per acre. The acreage forecast is 13% more than 2001.
- During the 1990's, the United States became a net exporter of processed tomato products with 2001 export volume at 2.2 billion pounds.
- Top U.S. export markets for processed tomatoes in MY 2000/01 included Canada (52%), Mexico (12%), Japan (11%), and South Korea (7%).
- In 2000/01, tomato sauces accounted for 38 percent of exports, followed by paste (33 percent), canned whole products (16 percent), and ketchup (13 percent).

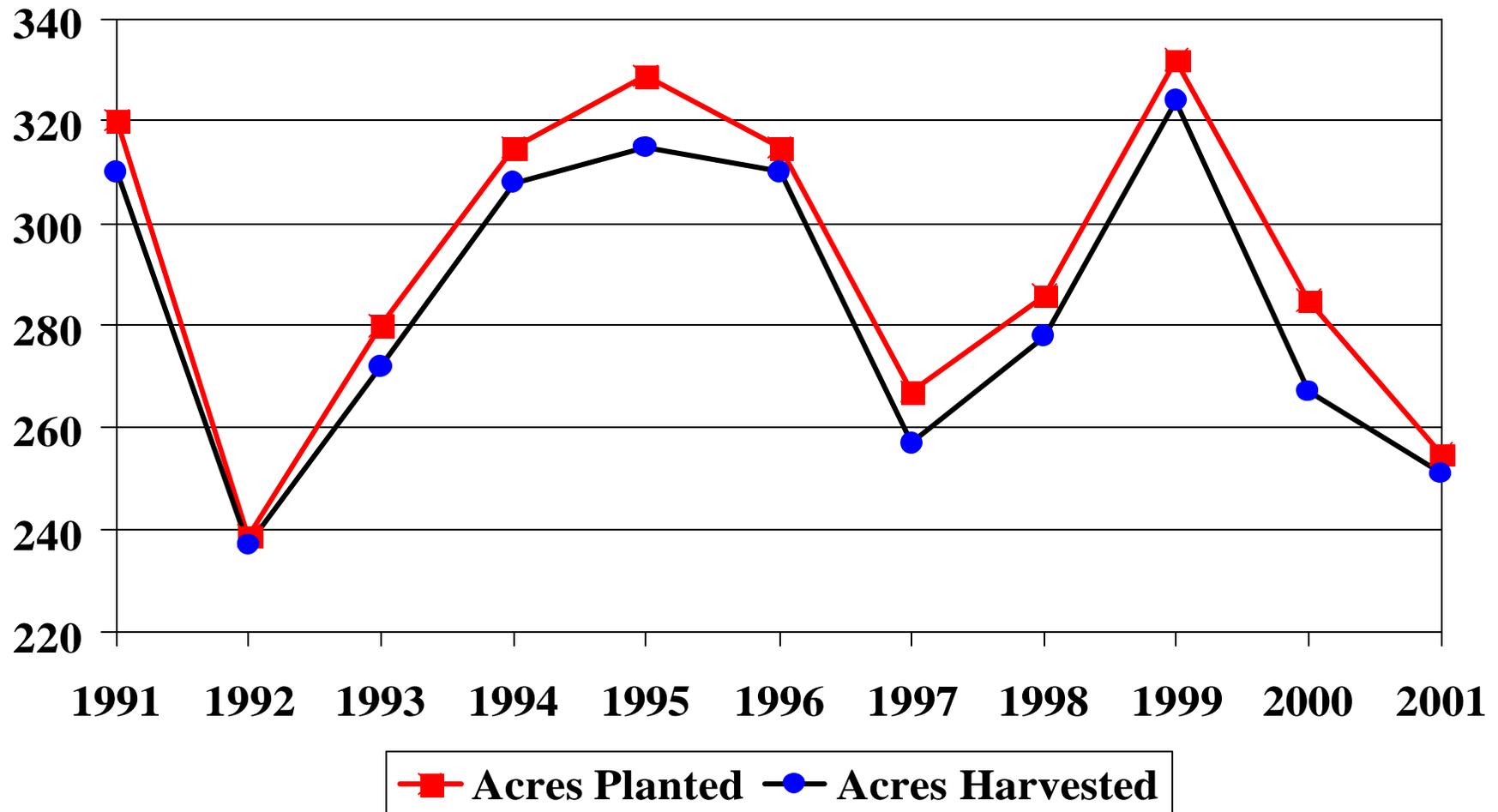
Four States Account for 99 Percent of the U.S. Processed Tomato Crop



Source: USDA, NASS

California Acreage Planted & Harvested (Contracted)

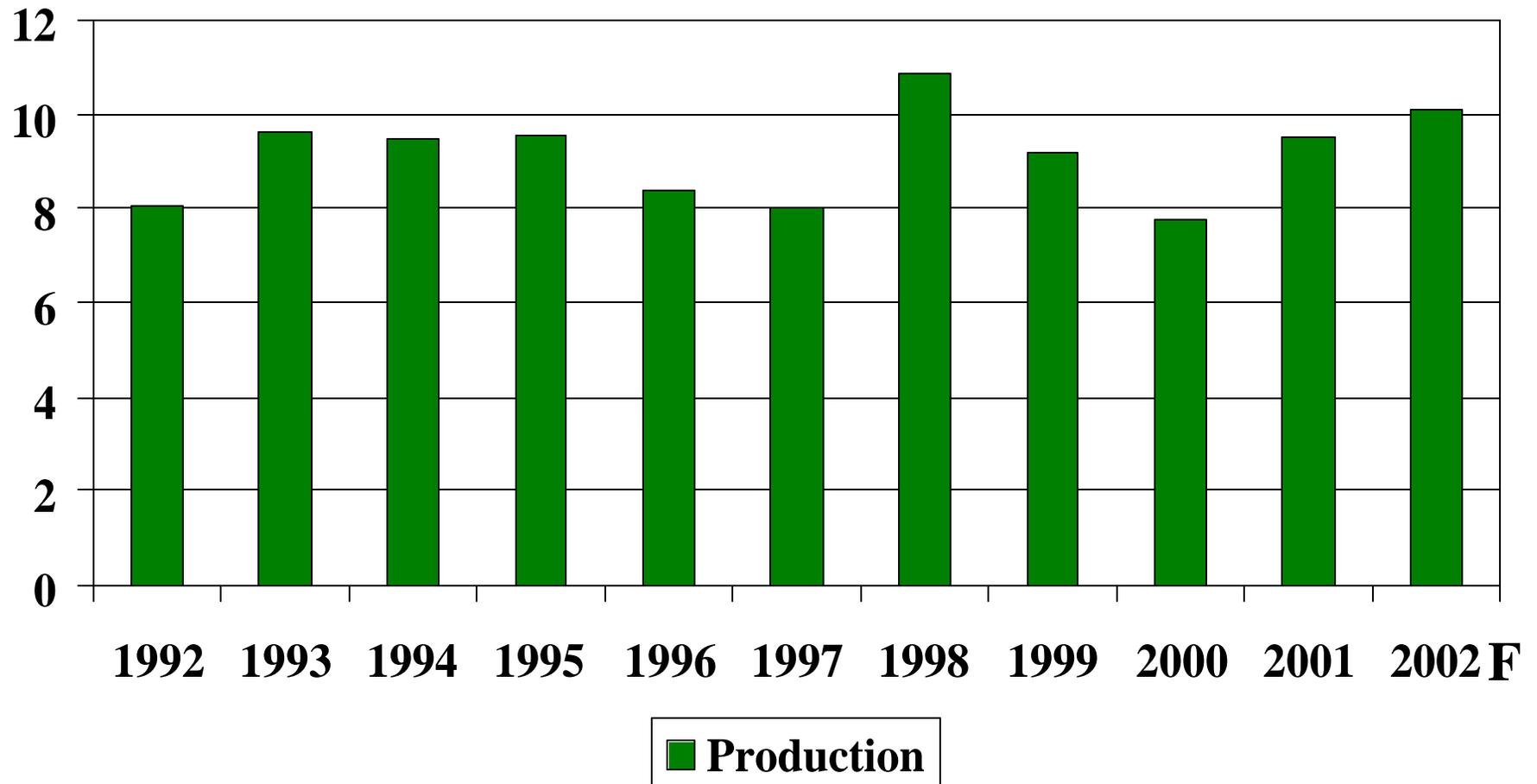
Thousand Acres



Source: California Agricultural Statistics Service
Marketing Season (July-June)

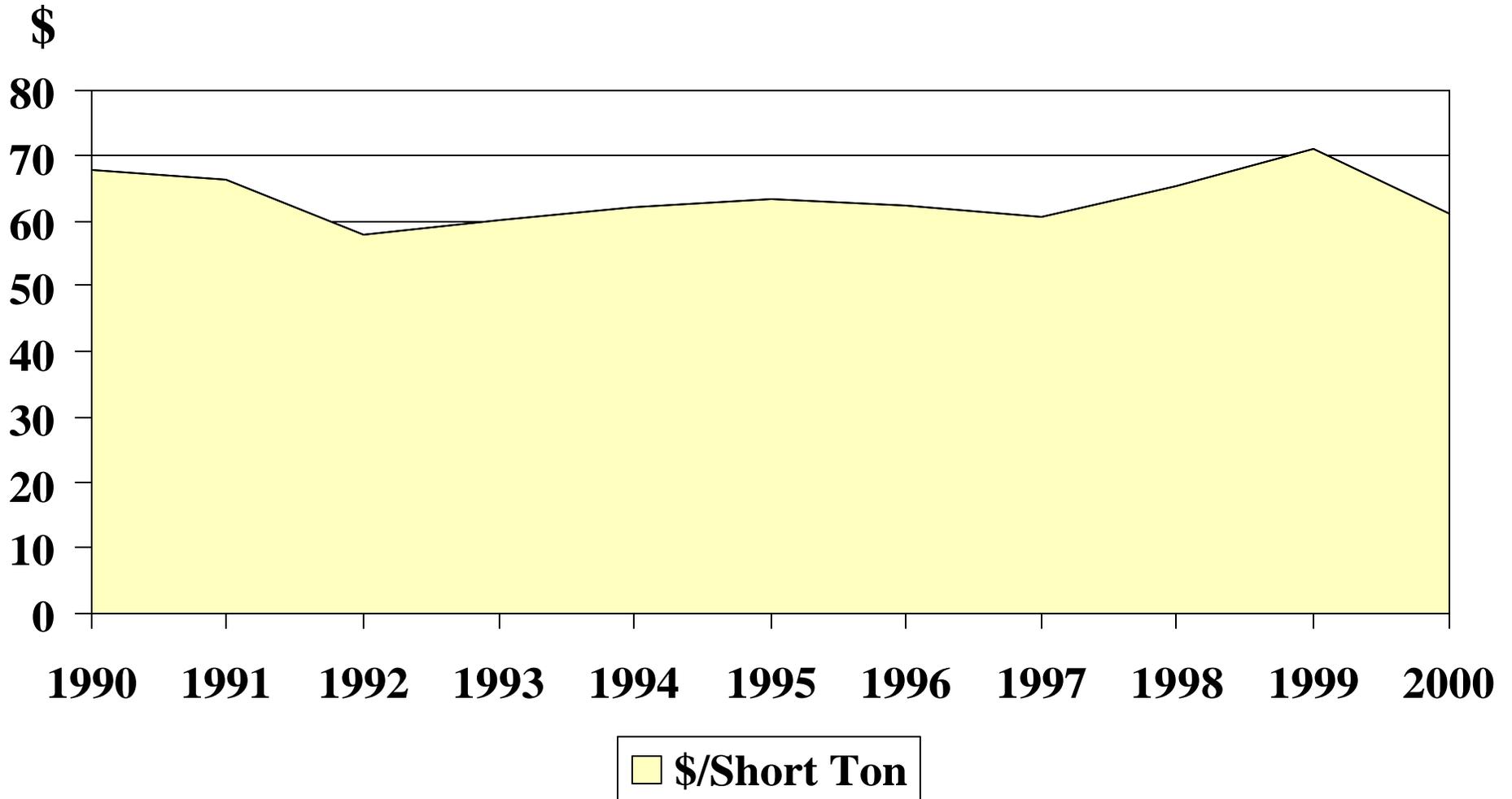
California Processed Tomato Production (Contracted)

Million MT



Source: California Agricultural Statistics Service
Marketing Season (July-June)

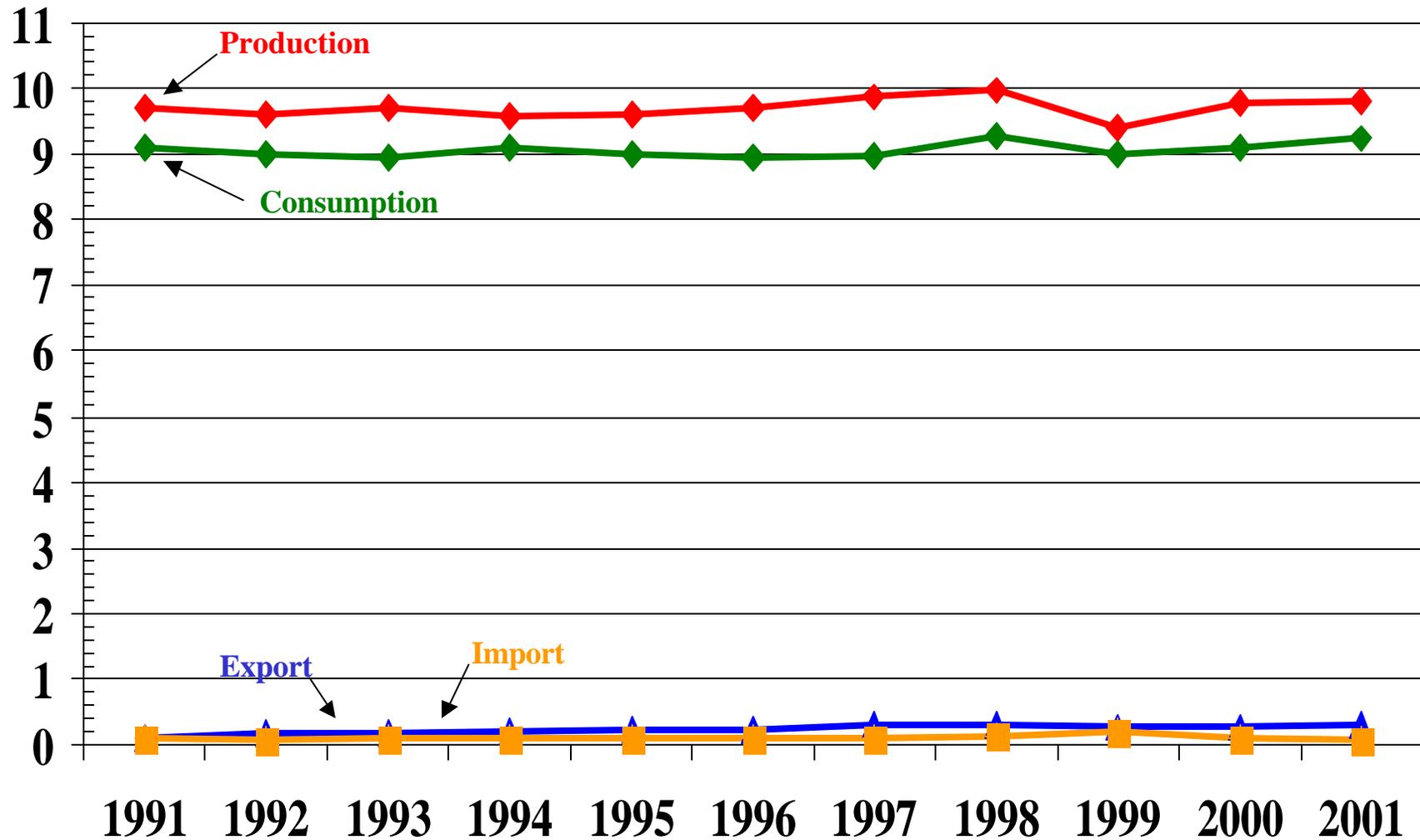
U.S. Farm Value of Tomatoes for Processing (\$/Short Ton)



Source: USDA, ERS

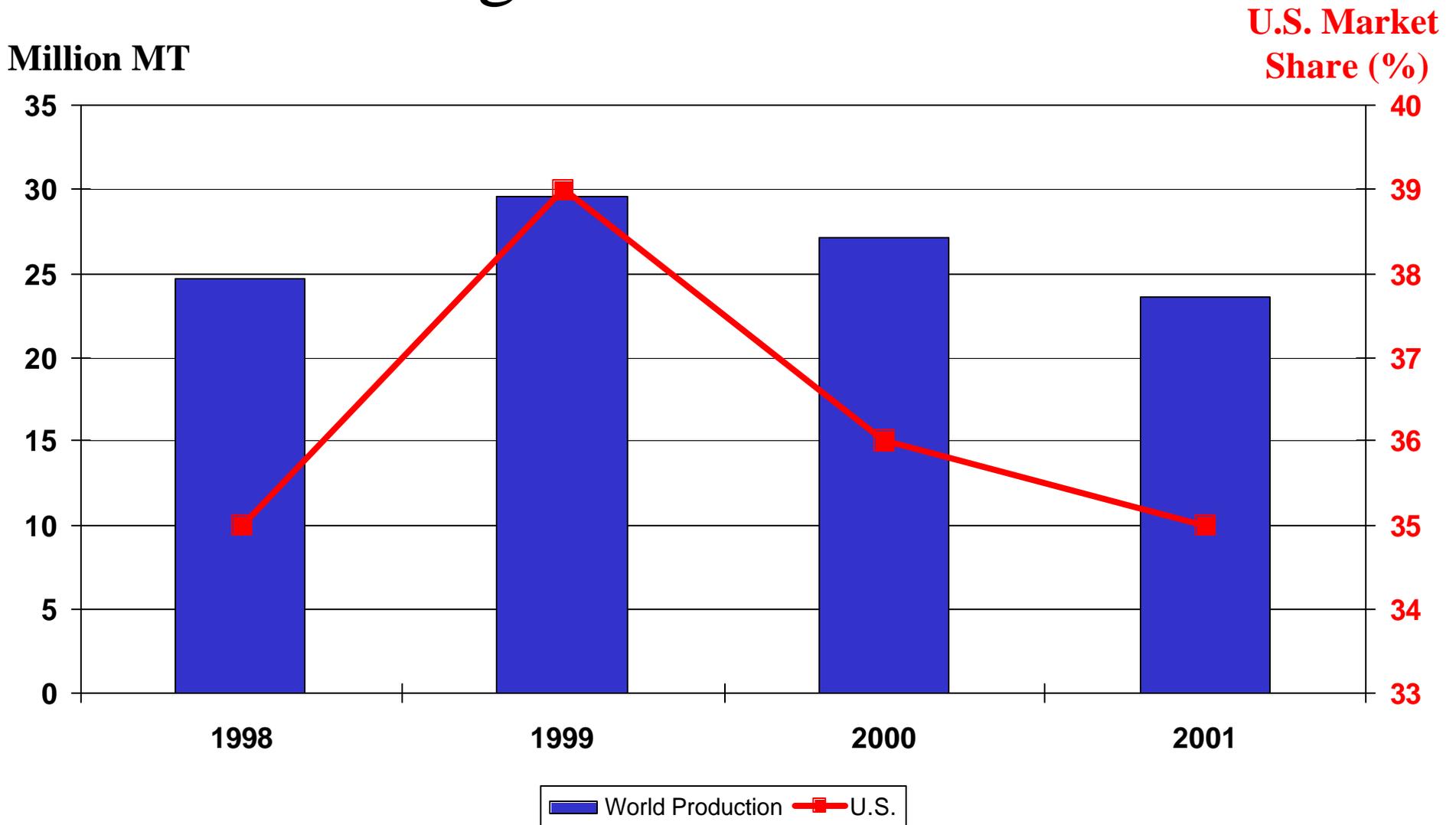
The U.S. Processed Tomato Market

Million MT



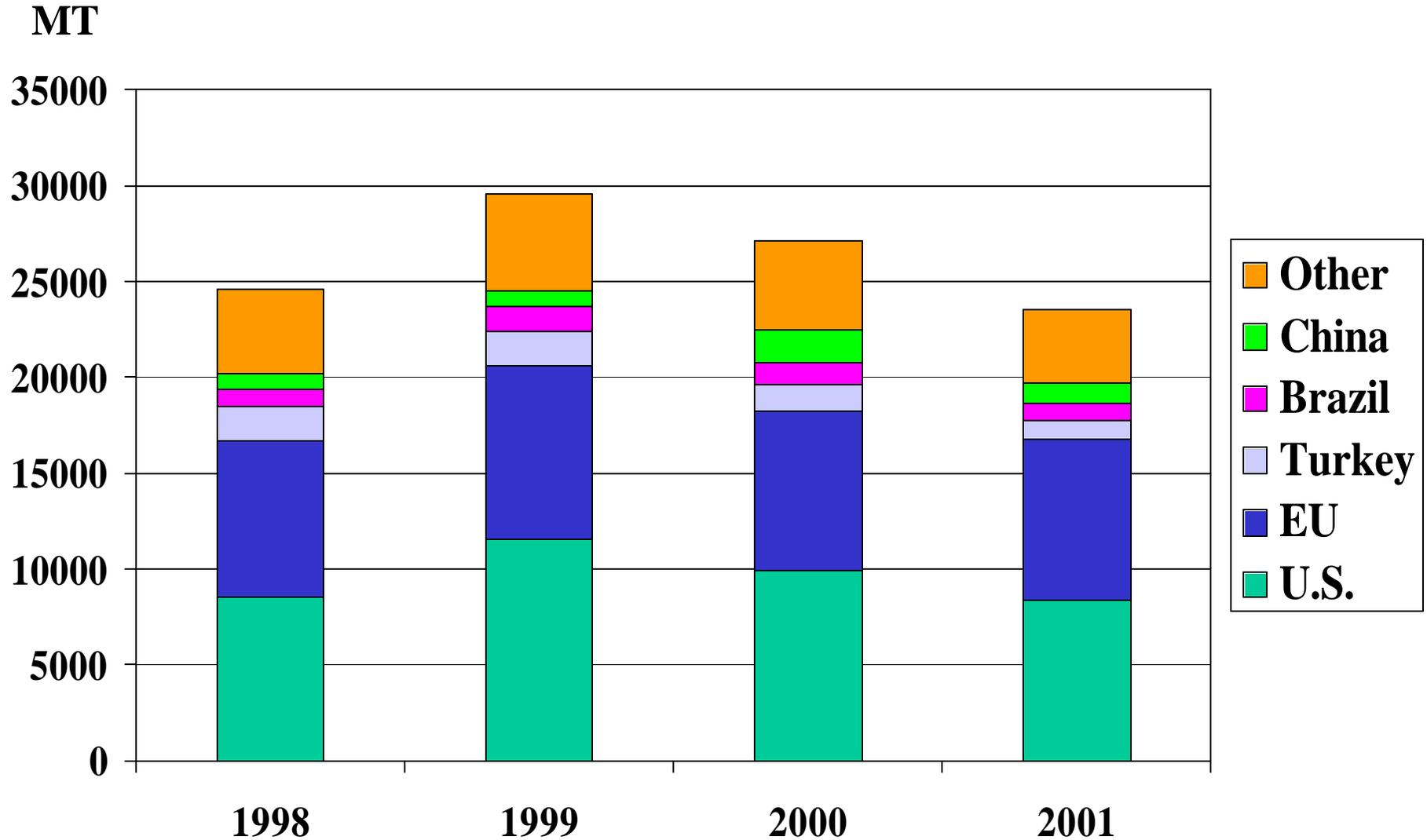
Source: Economic Research Service, USDA & U.S. Census Bureau

World Production of Tomatoes for Processing and U.S. Market Share



Source: Tomato News

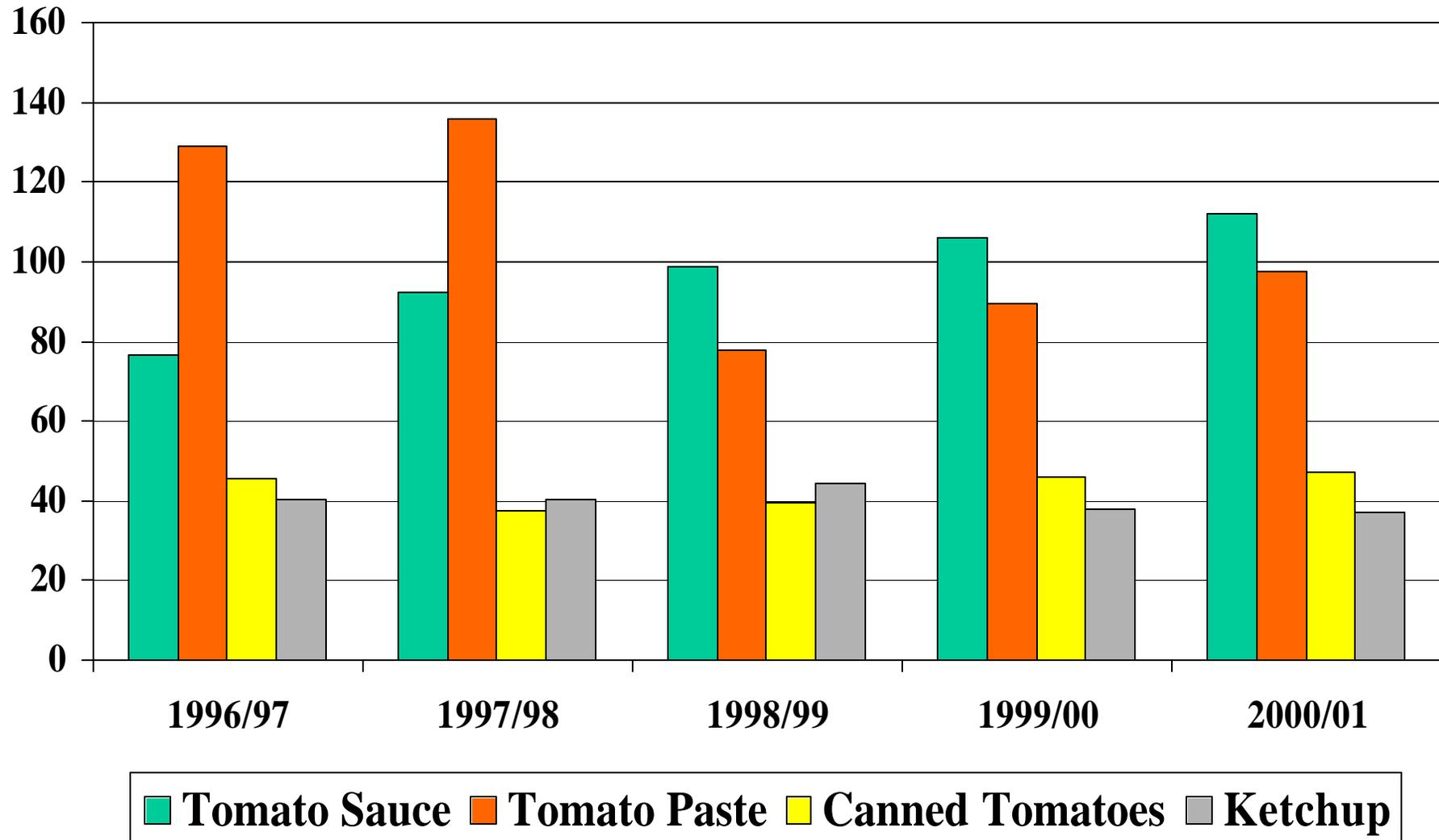
U.S. Share of World Processed Tomato Production



Source: Tomato News

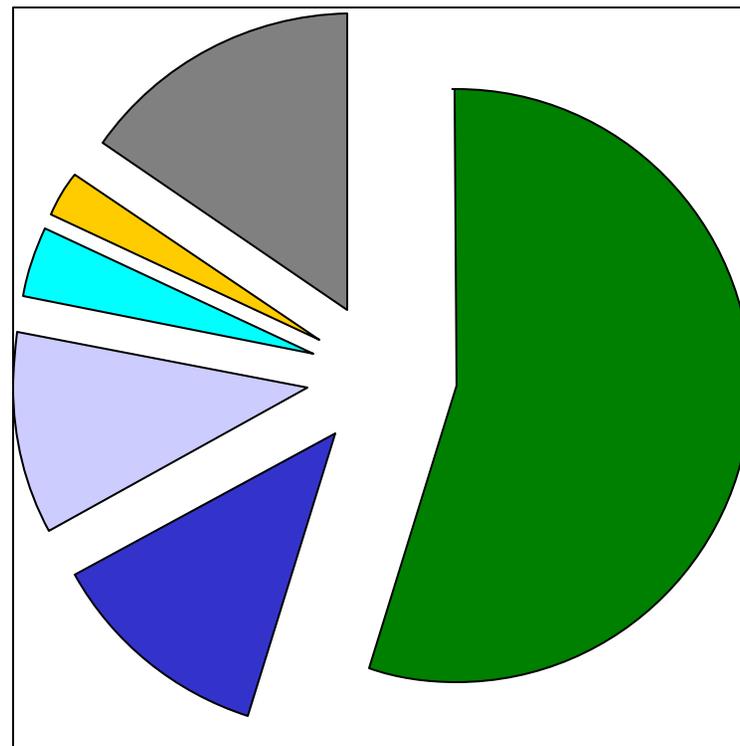
U.S. Exports of Processed Tomato Products

Thousand MT



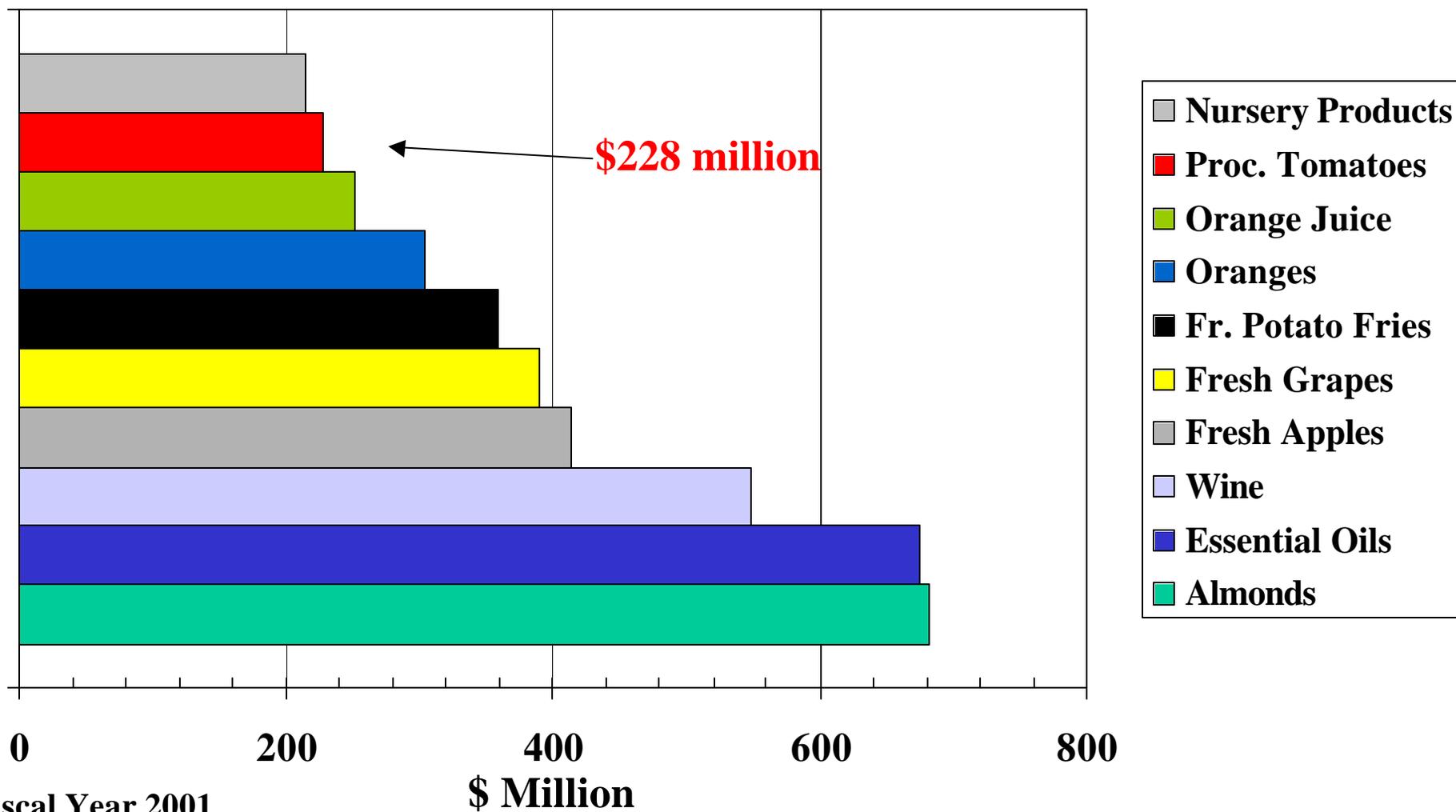
Source: U.S. Census Bureau

Top 5 Export Markets for Processed Tomato Products (in MT)



Source: U.S. Census Bureau

Processed Tomatoes Are the 9th Leading U.S. Horticultural Export by Value

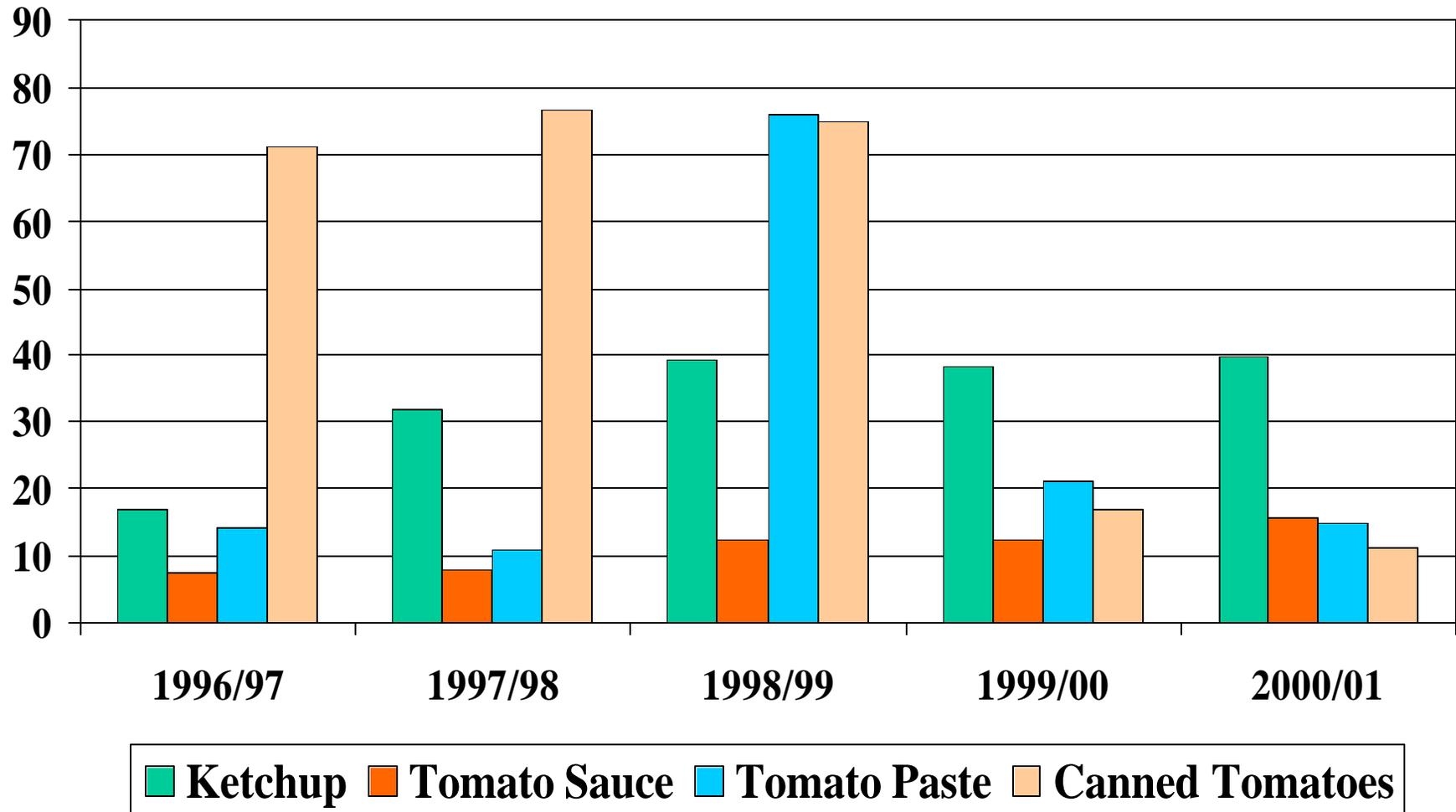


Fiscal Year 2001

Source: U.S. Census Bureau

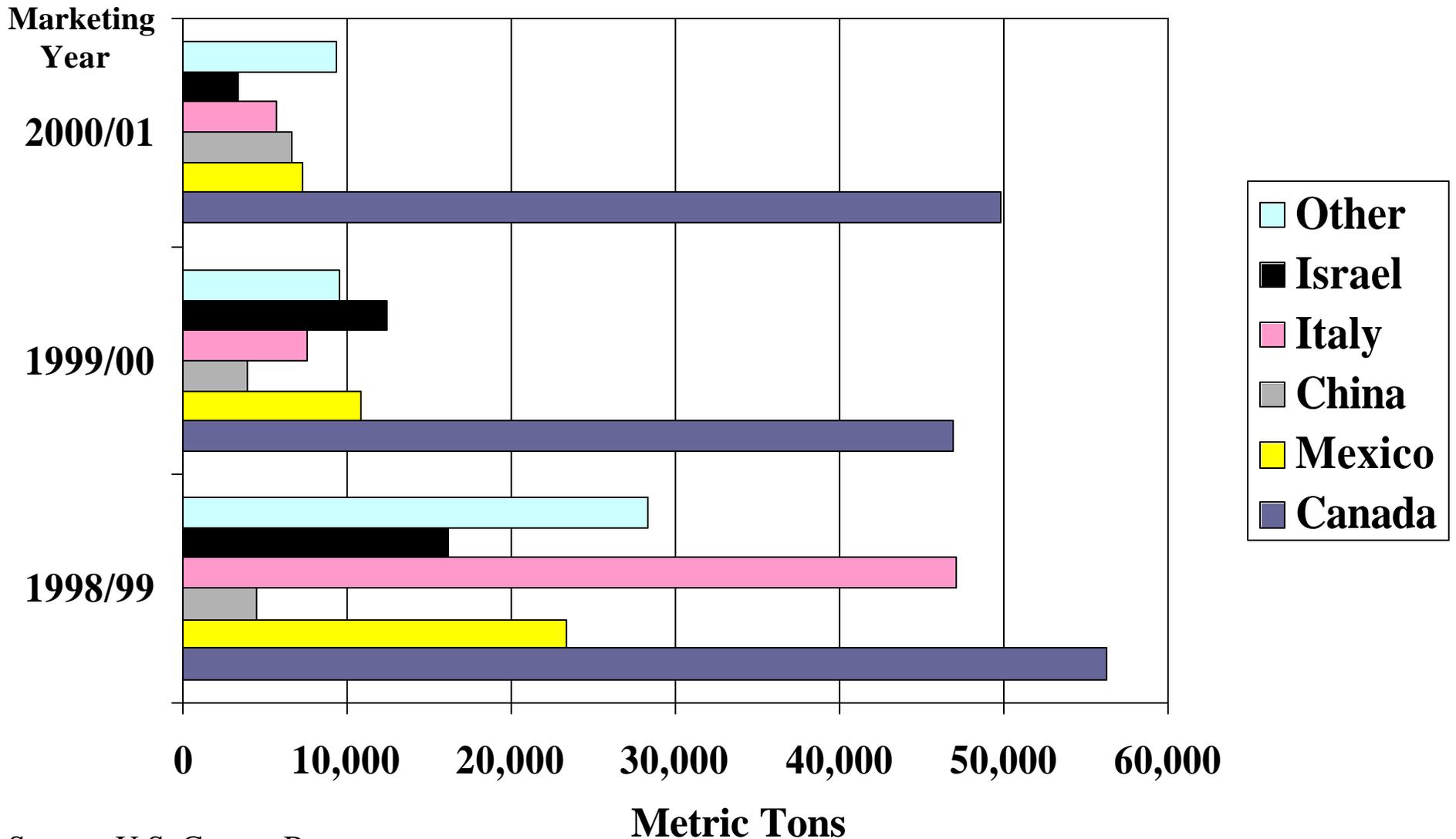
U.S. Imports of Processed Tomato Products

Thousand MT



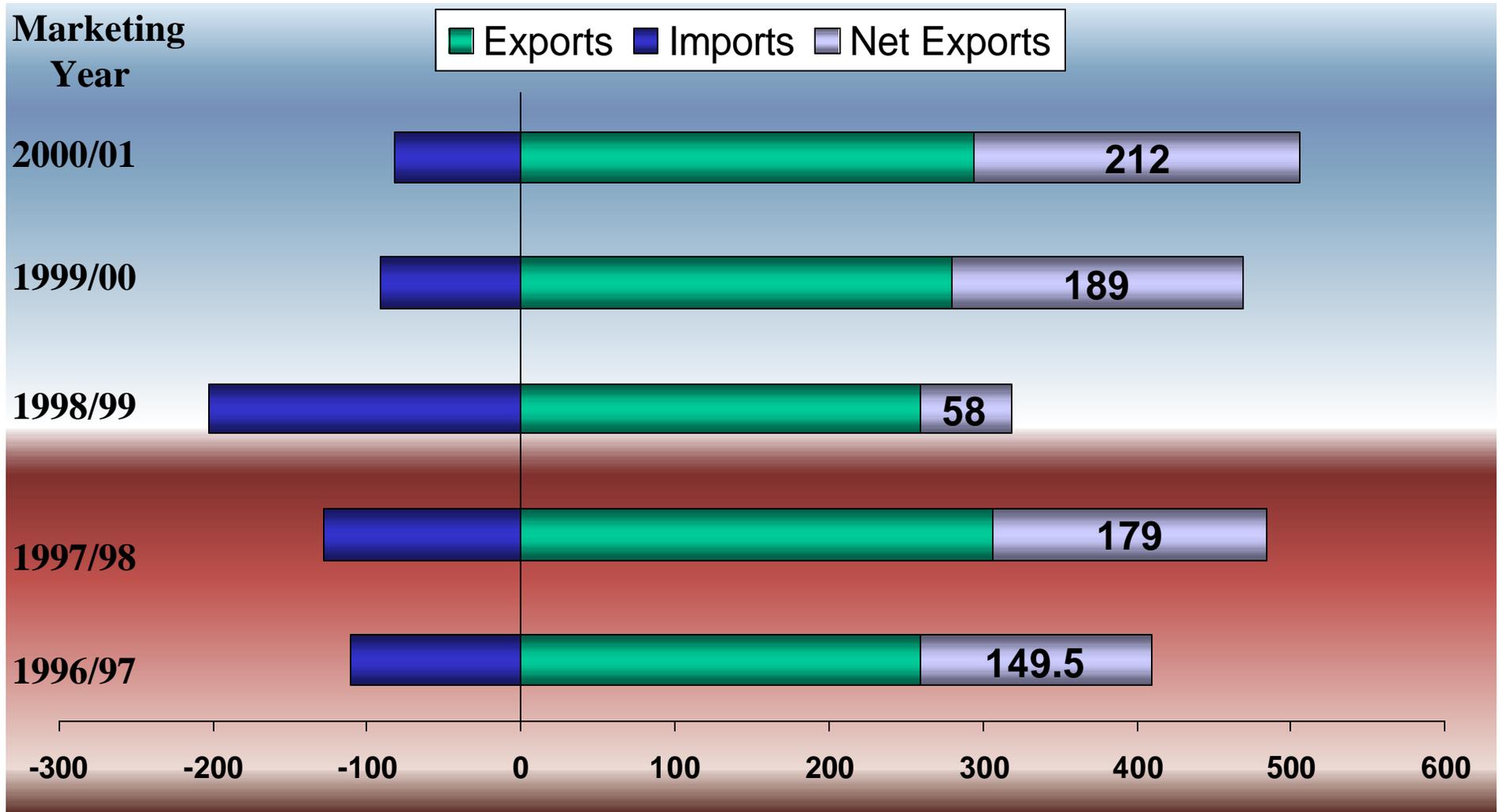
Source: U.S. Census Bureau

U.S. Imports of Processed Tomato Products By Country



Source: U.S. Census Bureau

U.S. Trade Balance in Processed Tomato Products

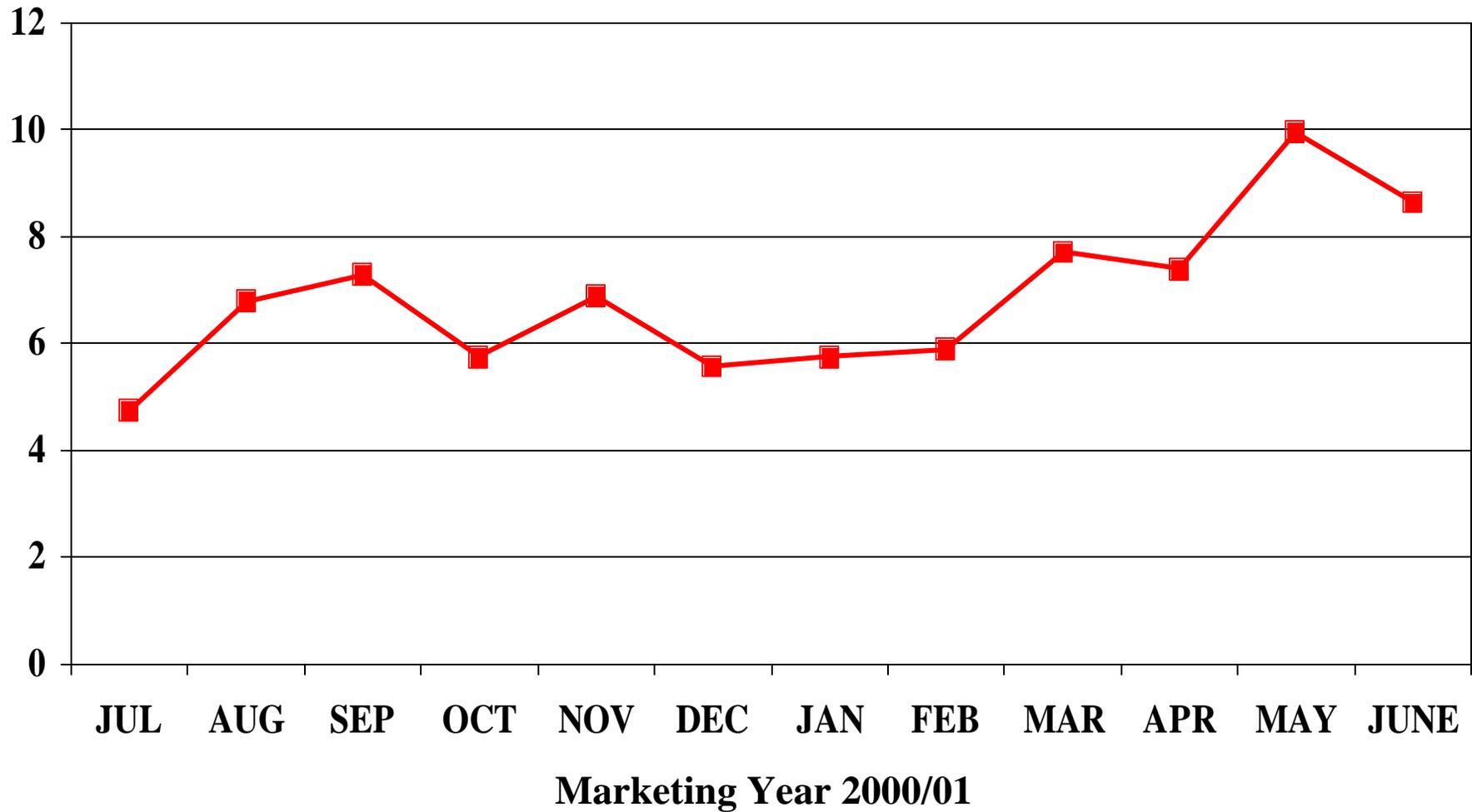


Source: U.S. Census Bureau

Thousand MT

Monthly Imports of Processed Tomato Products

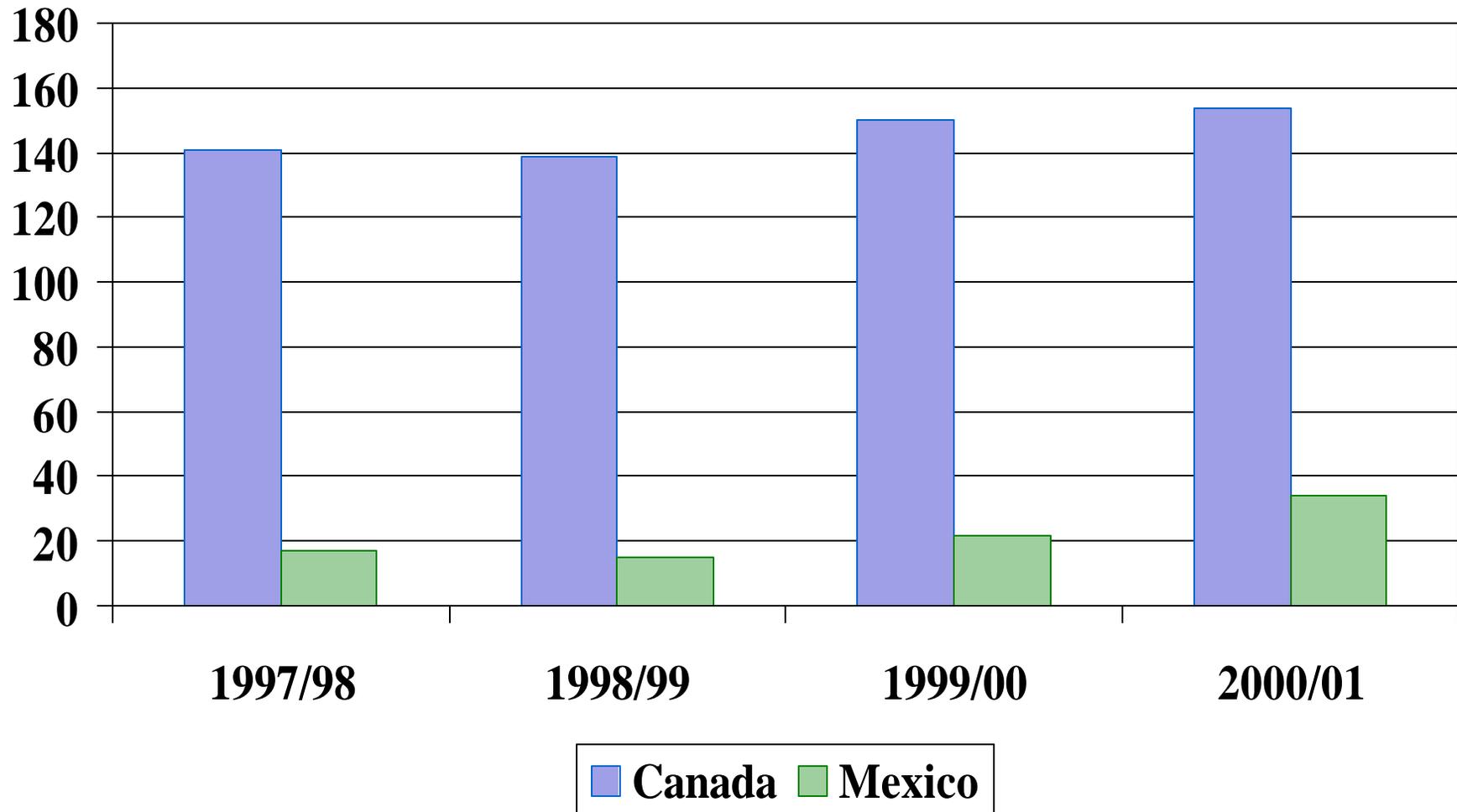
Thousand MT



Source: U.S. Census Bureau

U.S. Exports of Processed Tomato Products to NAFTA Countries

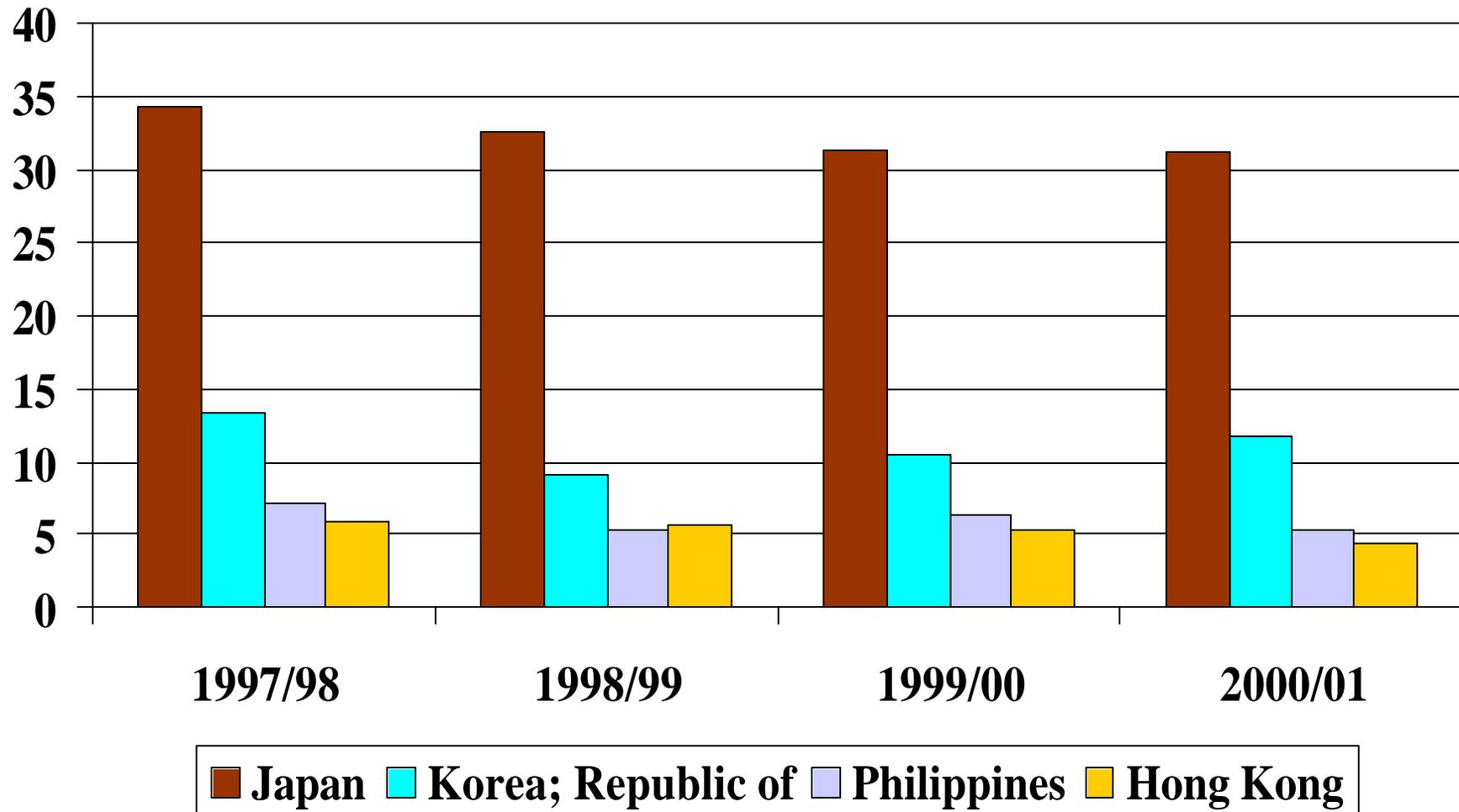
Thousand MT



Source: U.S. Census Bureau

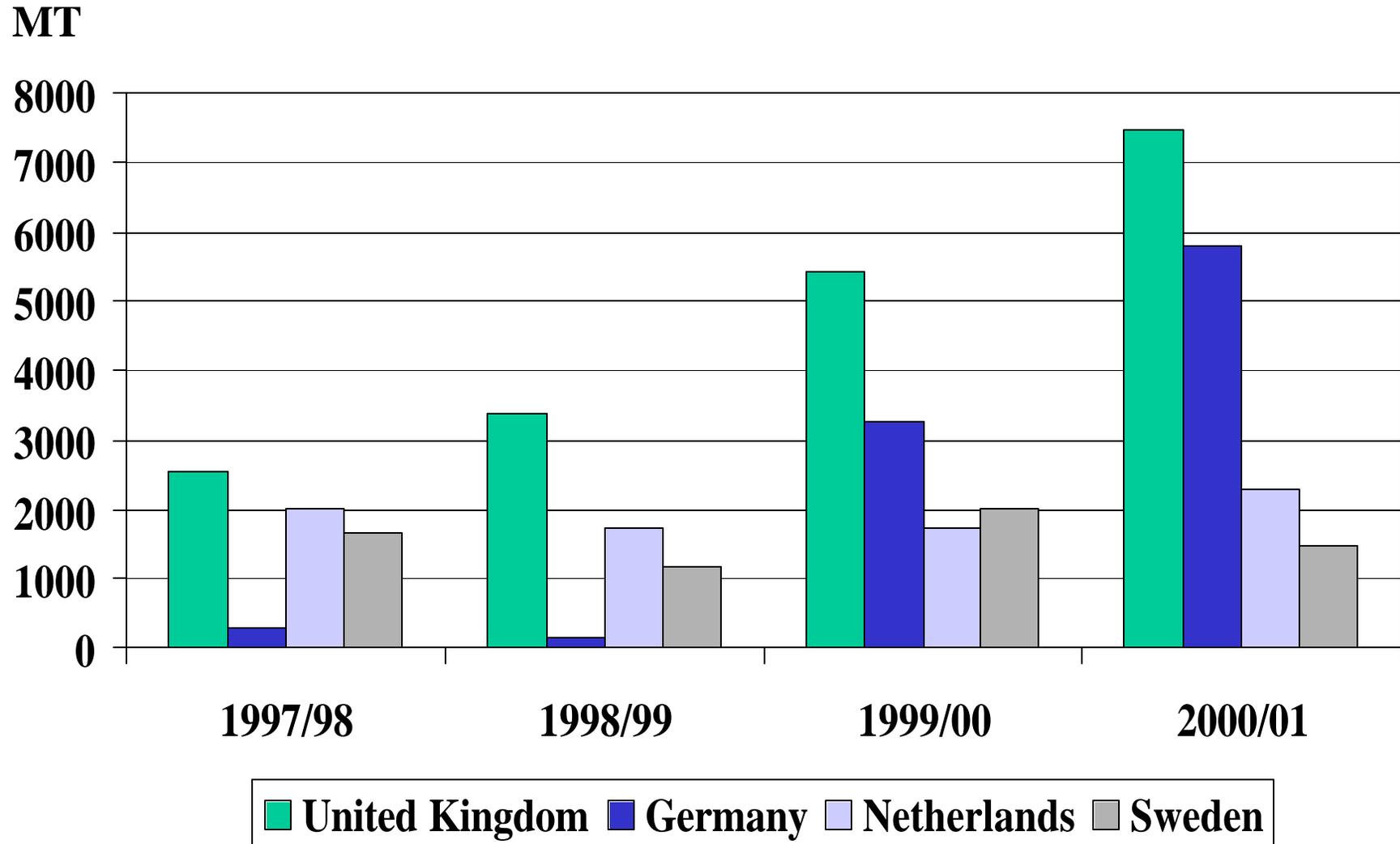
U.S. Exports of Processed Tomato Products to Key Asian Markets

Thousand MT



Source: U.S. Census Bureau

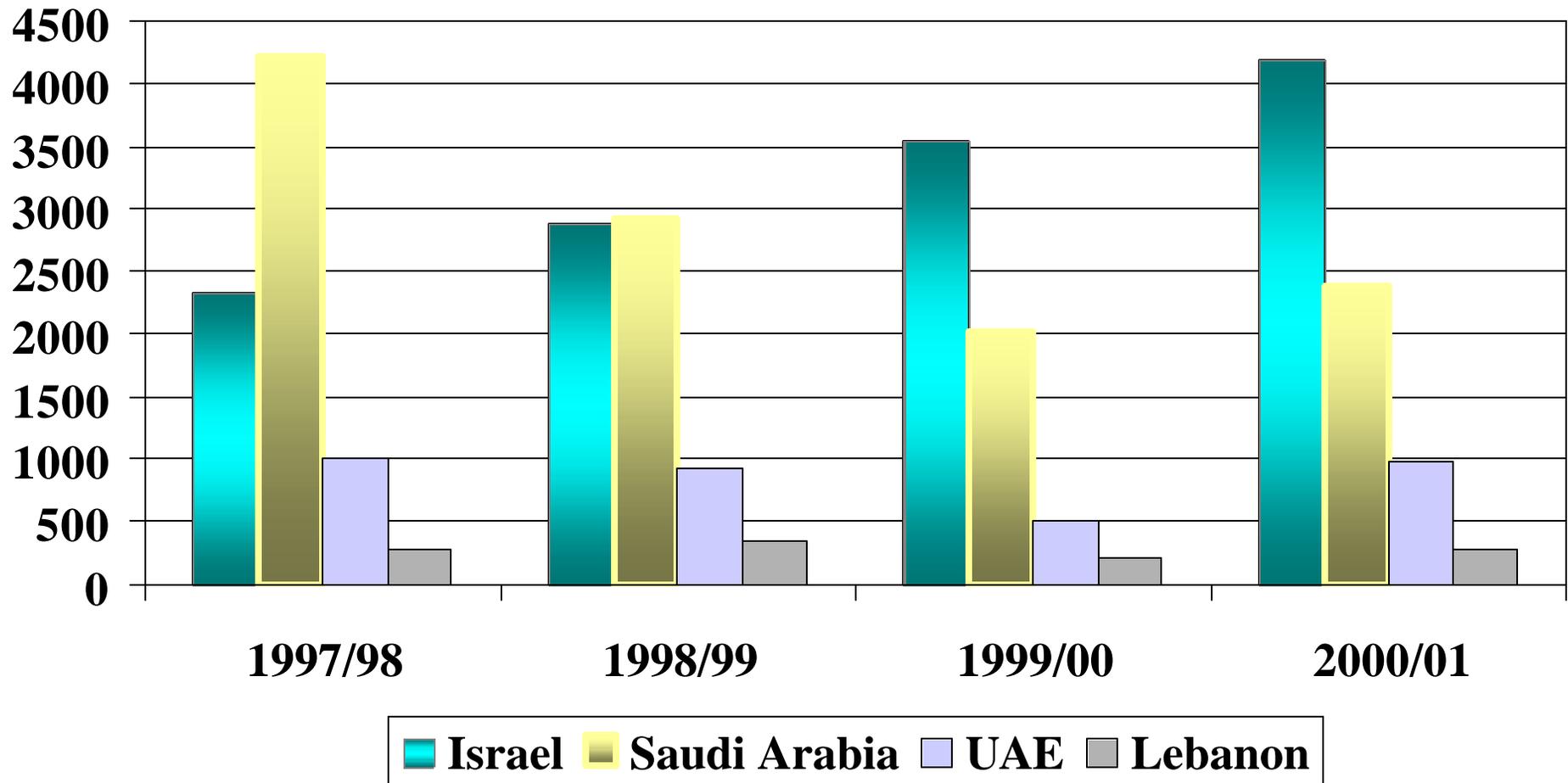
U.S. Exports of Processed Tomato Products to Key EU Markets



Source: U.S. Census Bureau

U.S. Exports of Processed Tomato Products to Key Middle Eastern Markets

MT



Source: U.S. Census Bureau