

**2021
PROCESSING
TOMATO
SEASON REVIEW**

2021-22 California Pack

- 2021-May Projections – 11.6 million tons
– 231,000 Acres
- Actual Deliveries – 10.76 million tons - 7.24%
- January 2022 Projections – 12.2 million tons
– 245,000 acres, up 6% from 2021
- Are the Acres There??

2021 Tomato Season Review Southern Counties

- South started on time, yields were good at the beginning then started declining.
- Reasons for declining yields in South
 - Lack of quality water, lack of water in general
 - TSWV resistance breaking strain
 - Split sets

2021 Tomato Season Review

Northern Counties

- North started slow but on time, yields were good at the beginning and remained good throughout the season.
- Challenges in North
 - Lack of surface water
 - Groundwater levels have dropped substantially as well
 - Broomrape
 - Nematode breaking strain
 - Curly Top Virus

2021 Tomato Season Review

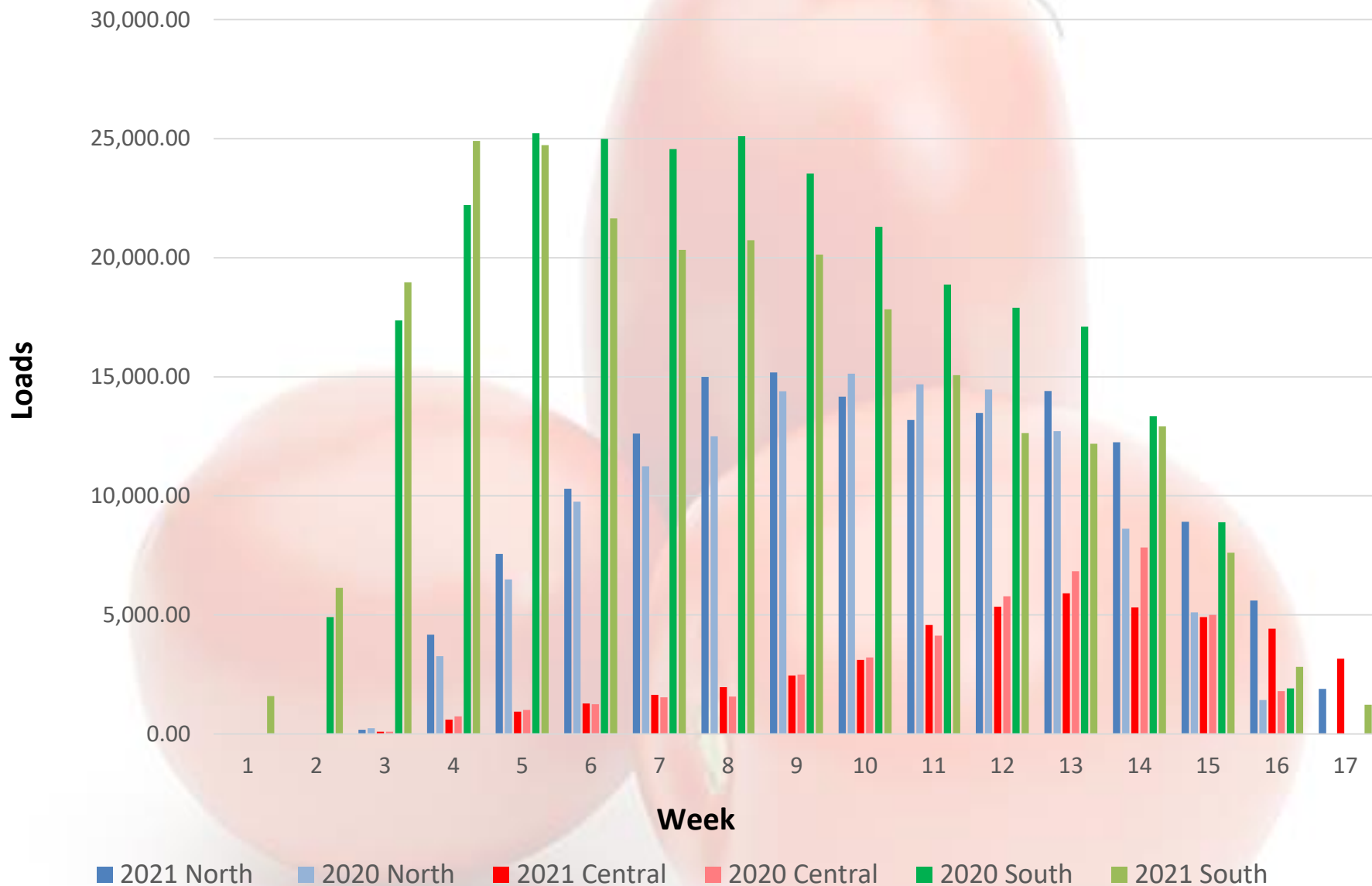
Central Counties

- Central started a little late, yields were good at the beginning and remained good throughout the growing period.
- Challenges in Central
 - Lack of water
 - F3 Pressure is building
 - Some split sets
 - October 16th RAIN

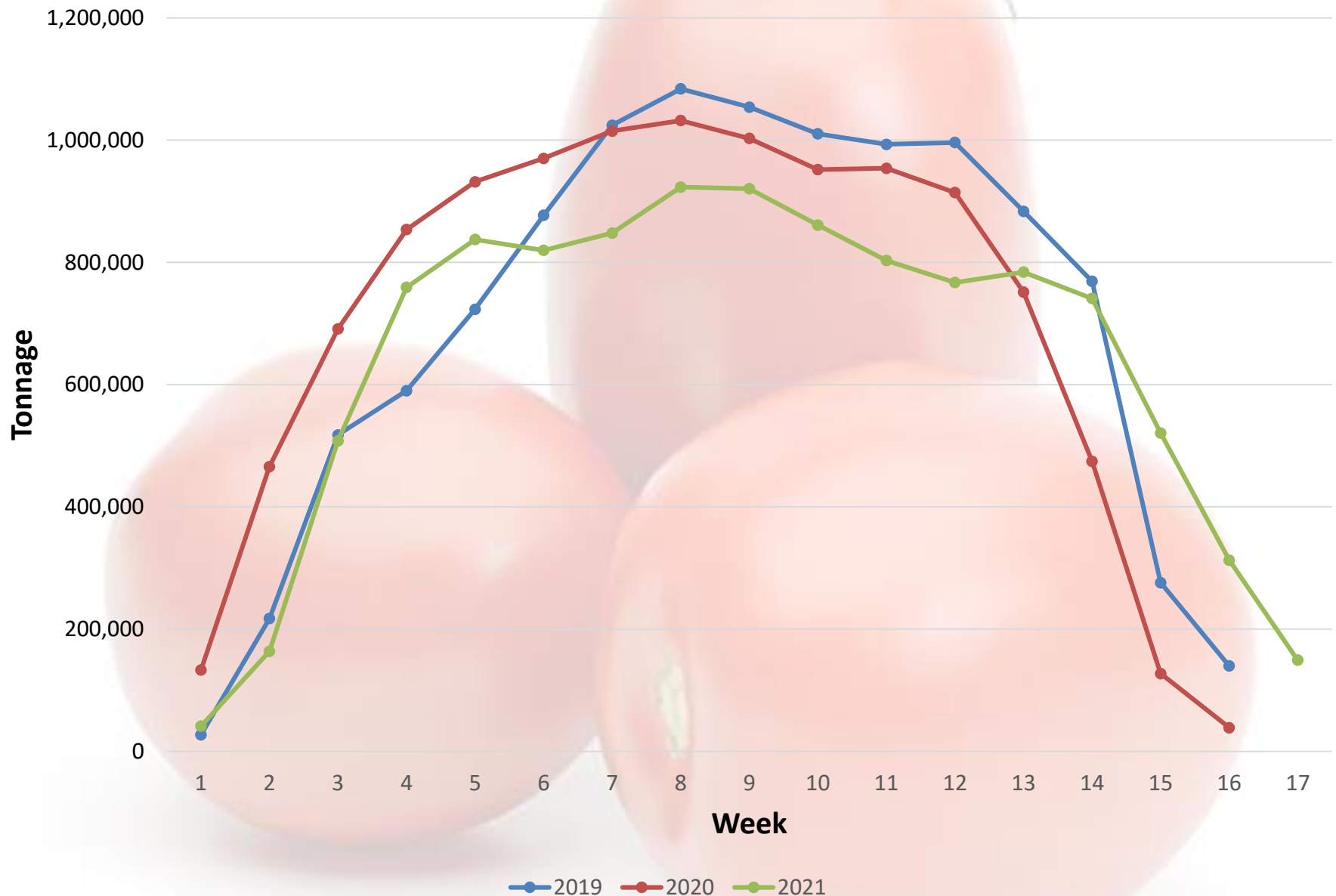
2021 Tomato Season Challenges

- F3 demand is growing at a high rate
 - Not enough F3 seed of the most popular varieties
 - Demand is so high, seed companies are having difficulties building seed fast enough to keep up.
 - Seed testing constraints have negatively affected seed delivery times.
- TSWV breaking strain and split sets in the South set the tone for the season.
 - Good crops in the North and Central were not enough to overcome the shortage in the South

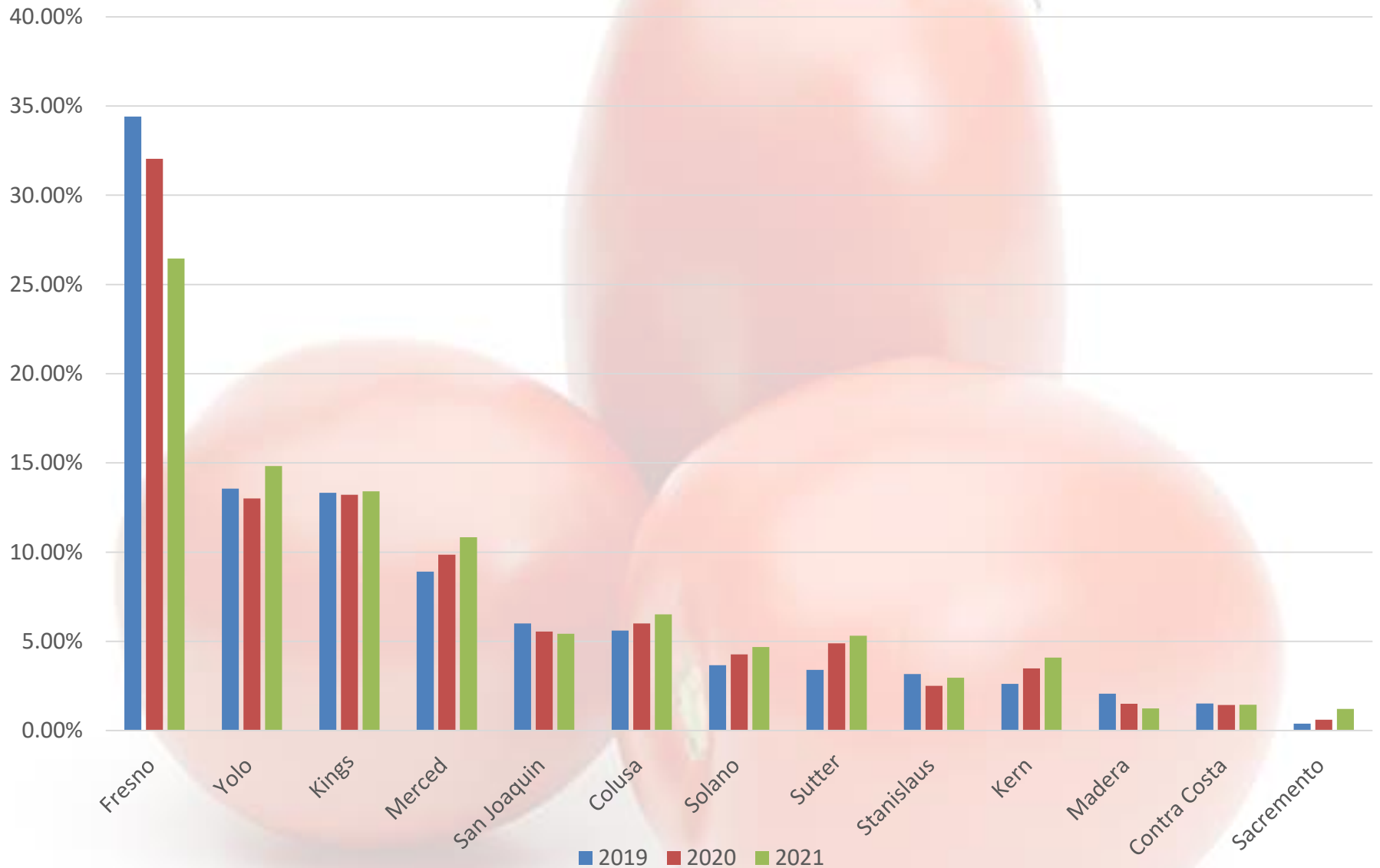
2021 vs 2020 Weekly Loads by Region



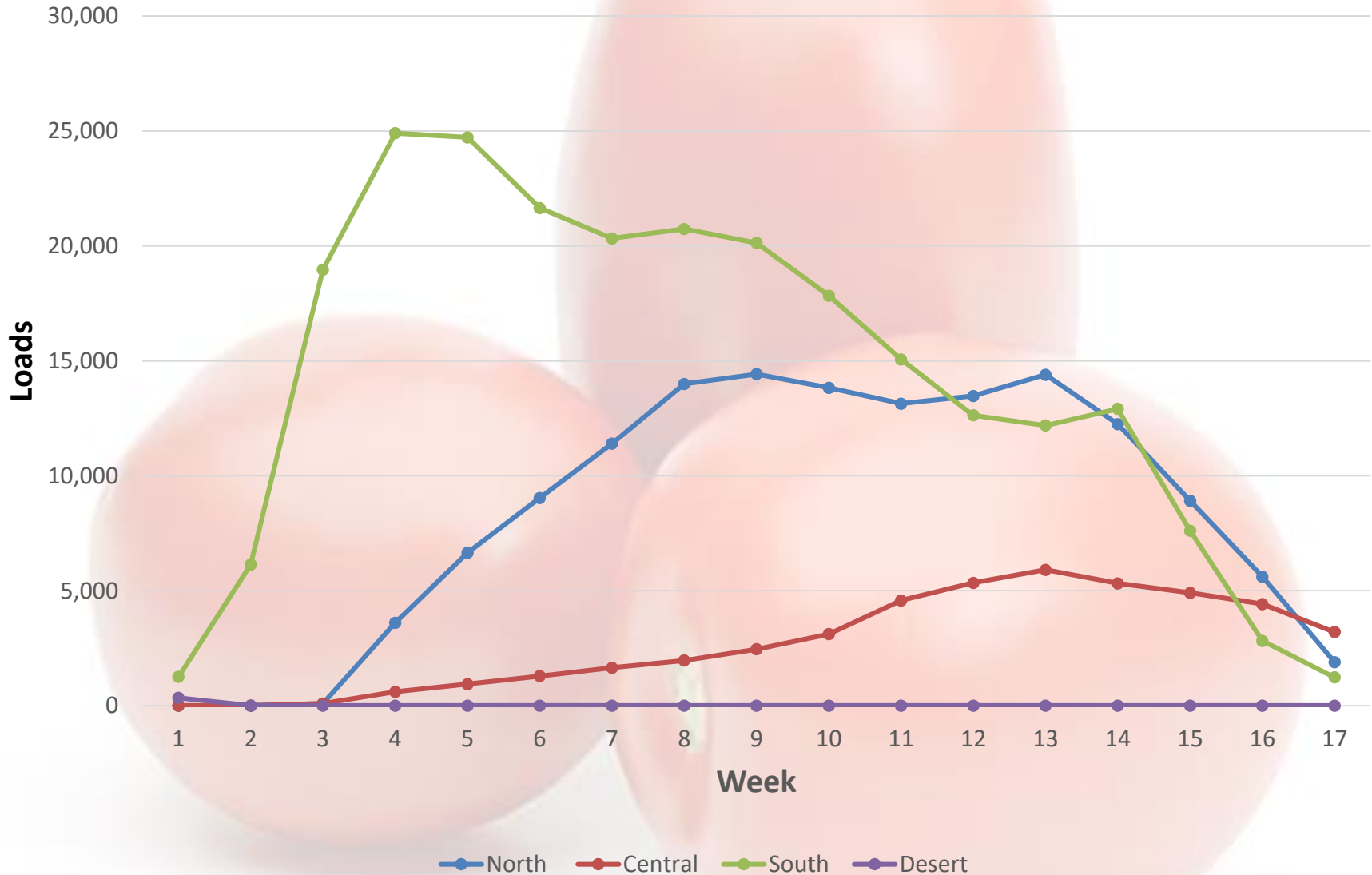
Weekly Tonnage 2019-2021



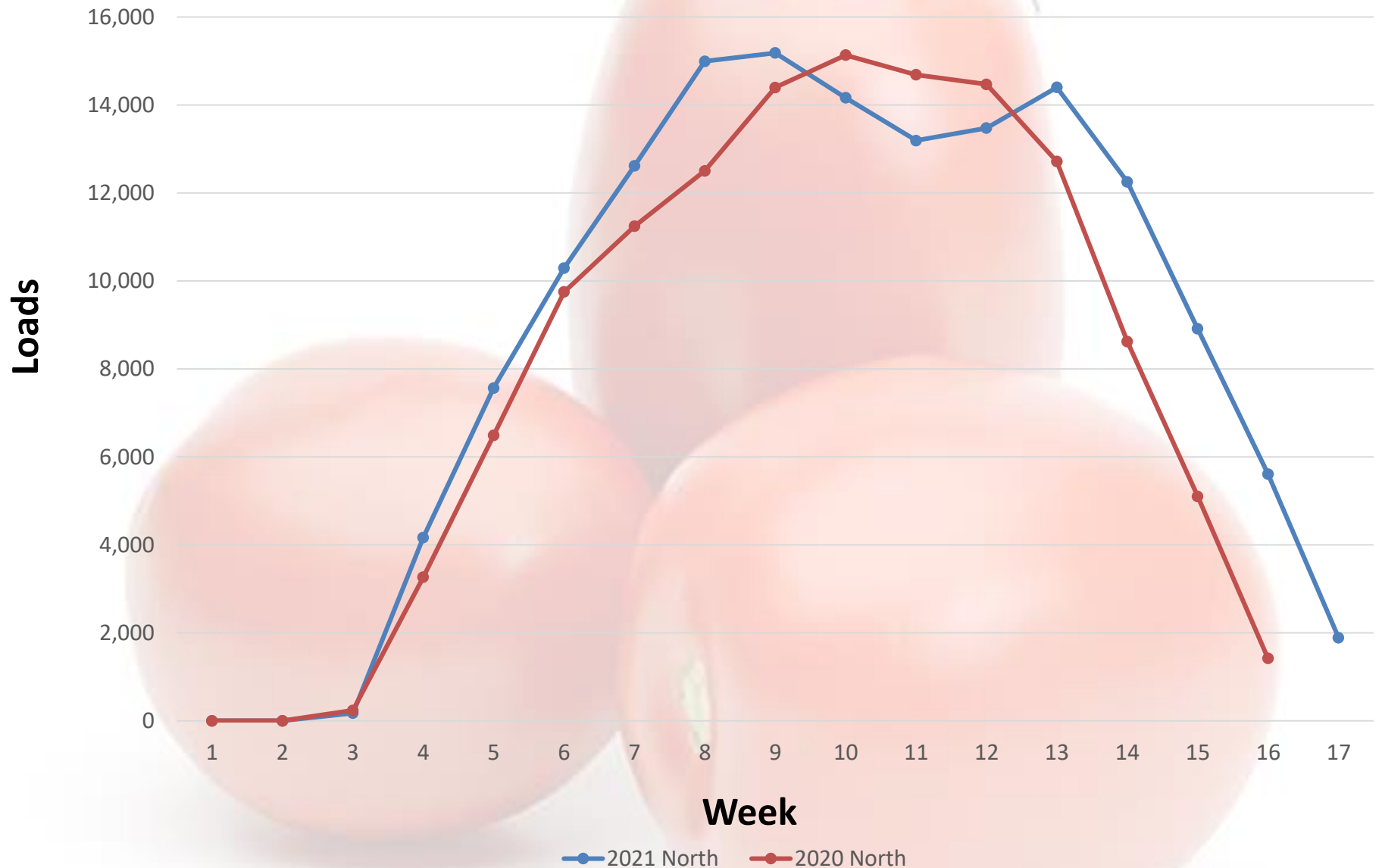
3 Year County Breakdown



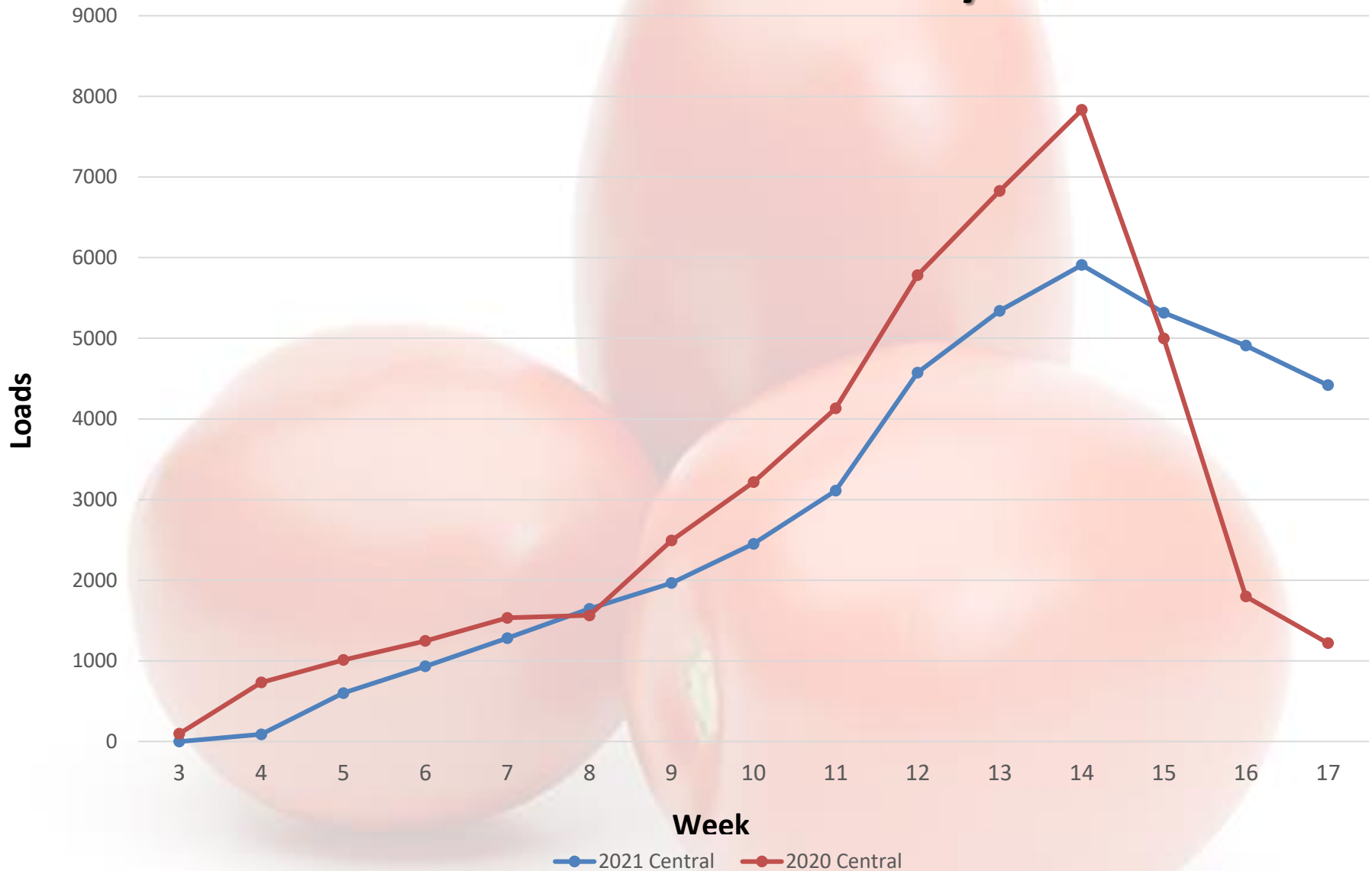
Total Weekly Loads by Region-2021



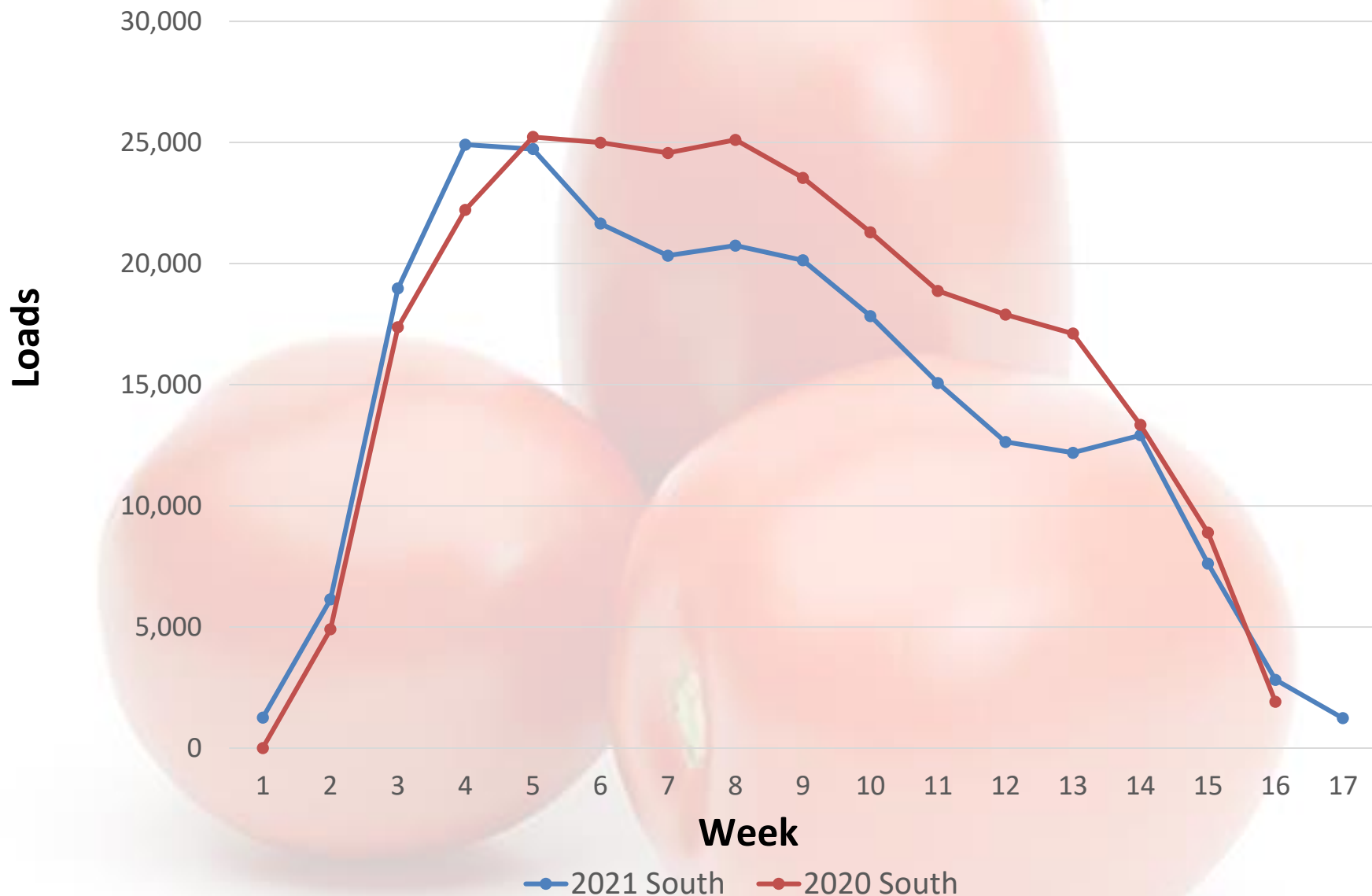
2021 vs 2020 Northern Weekly Loads



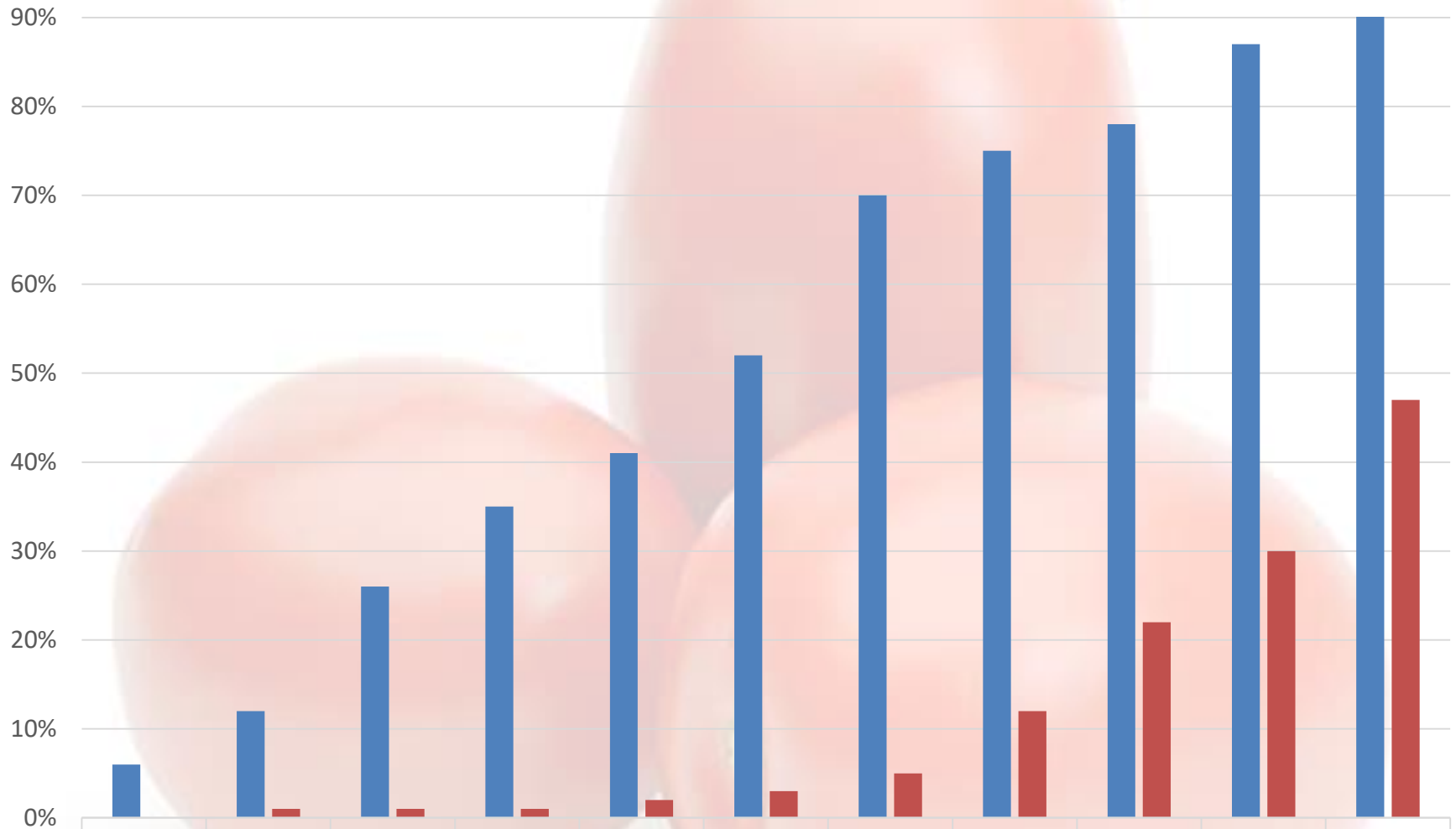
2021 vs 2020 Central Weekly Loads



2021 vs 2020 Southern Weekly Loads

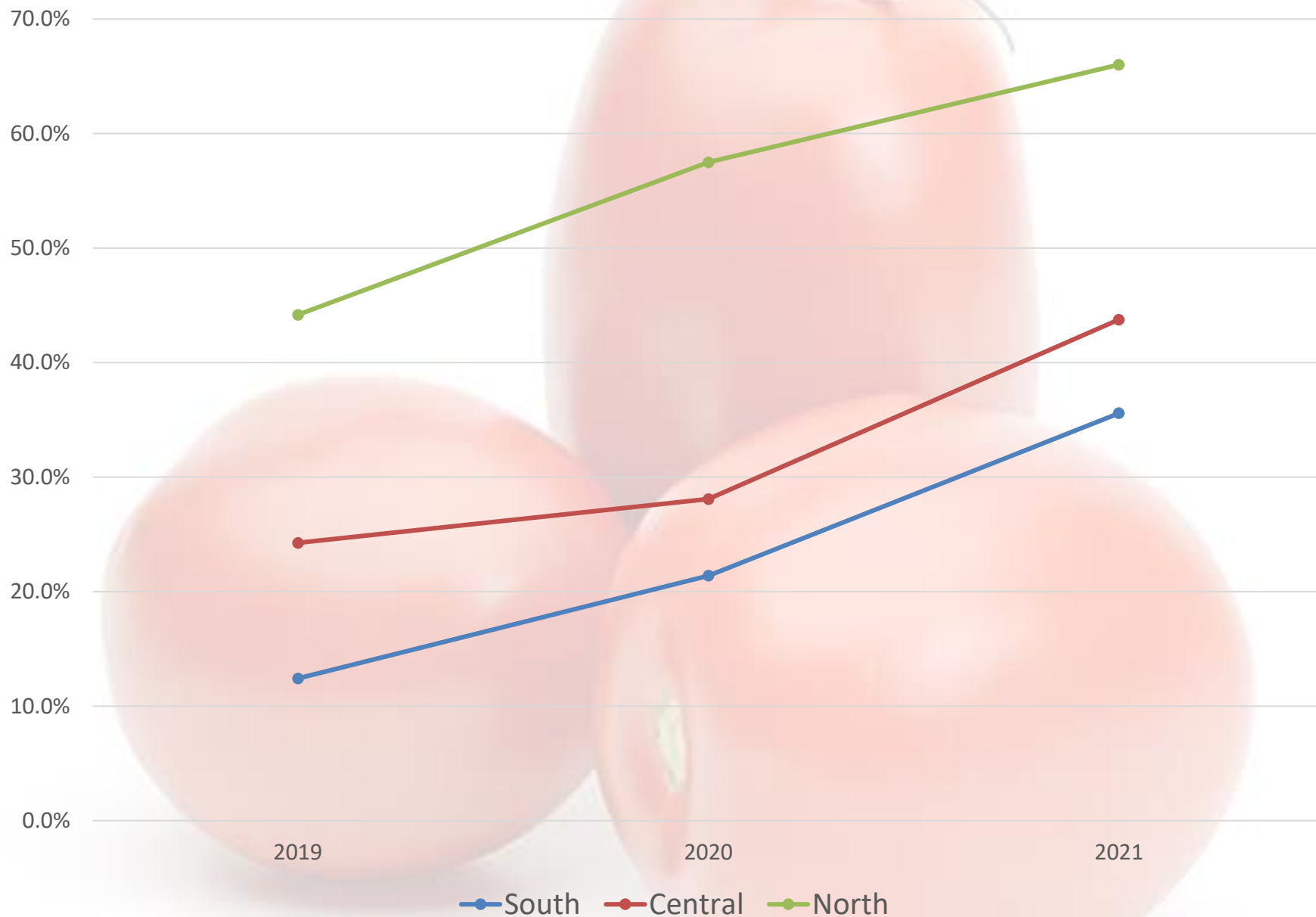


TSWV & F3 Usage %

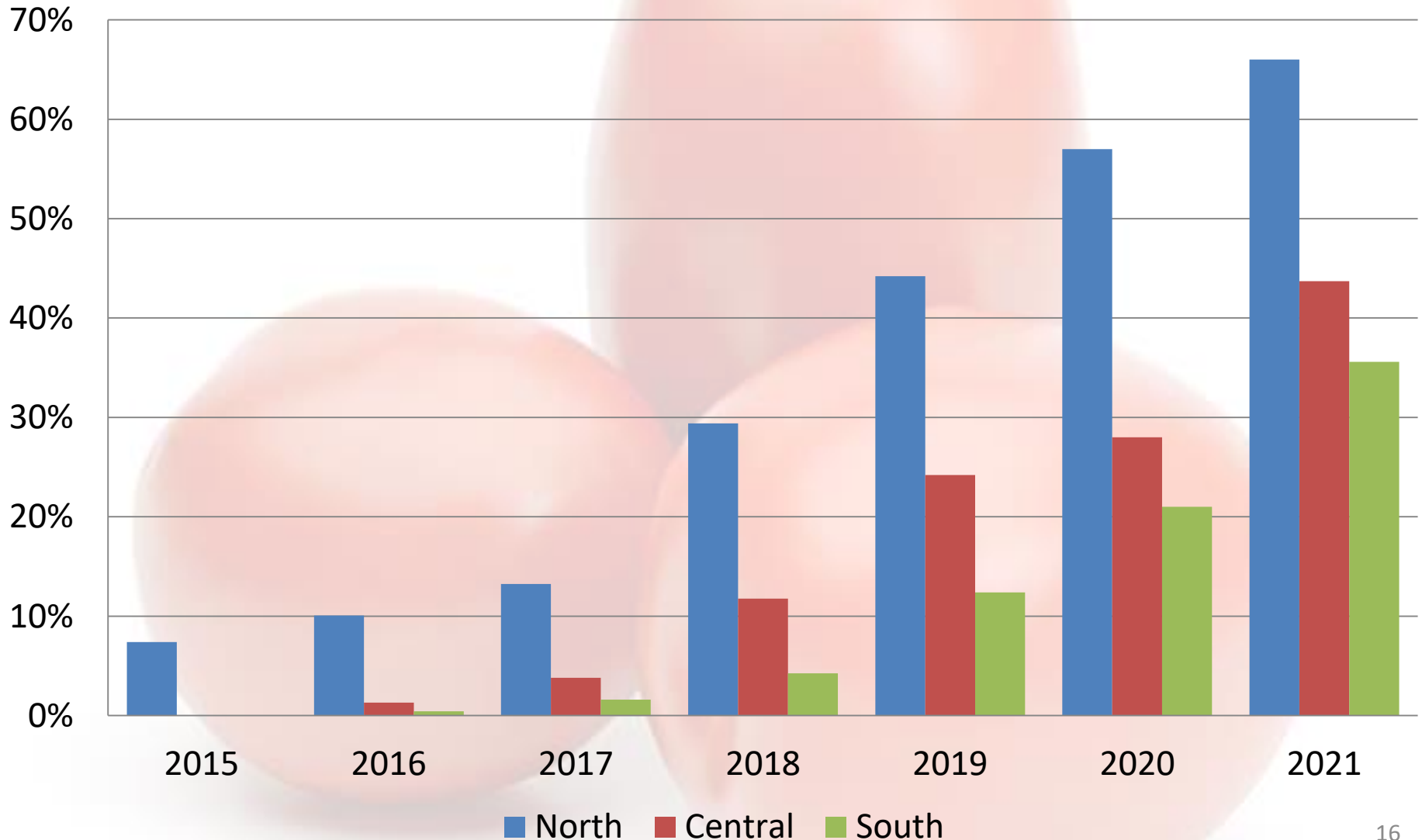


| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------|------|------|------|------|------|------|------|------|------|------|------|
| ■ TSWV | 6% | 12% | 26% | 35% | 41% | 52% | 70% | 75% | 78% | 87% | 91% |
| ■ F3 | 0% | 1% | 1% | 1% | 2% | 3% | 5% | 12% | 22% | 30% | 47% |

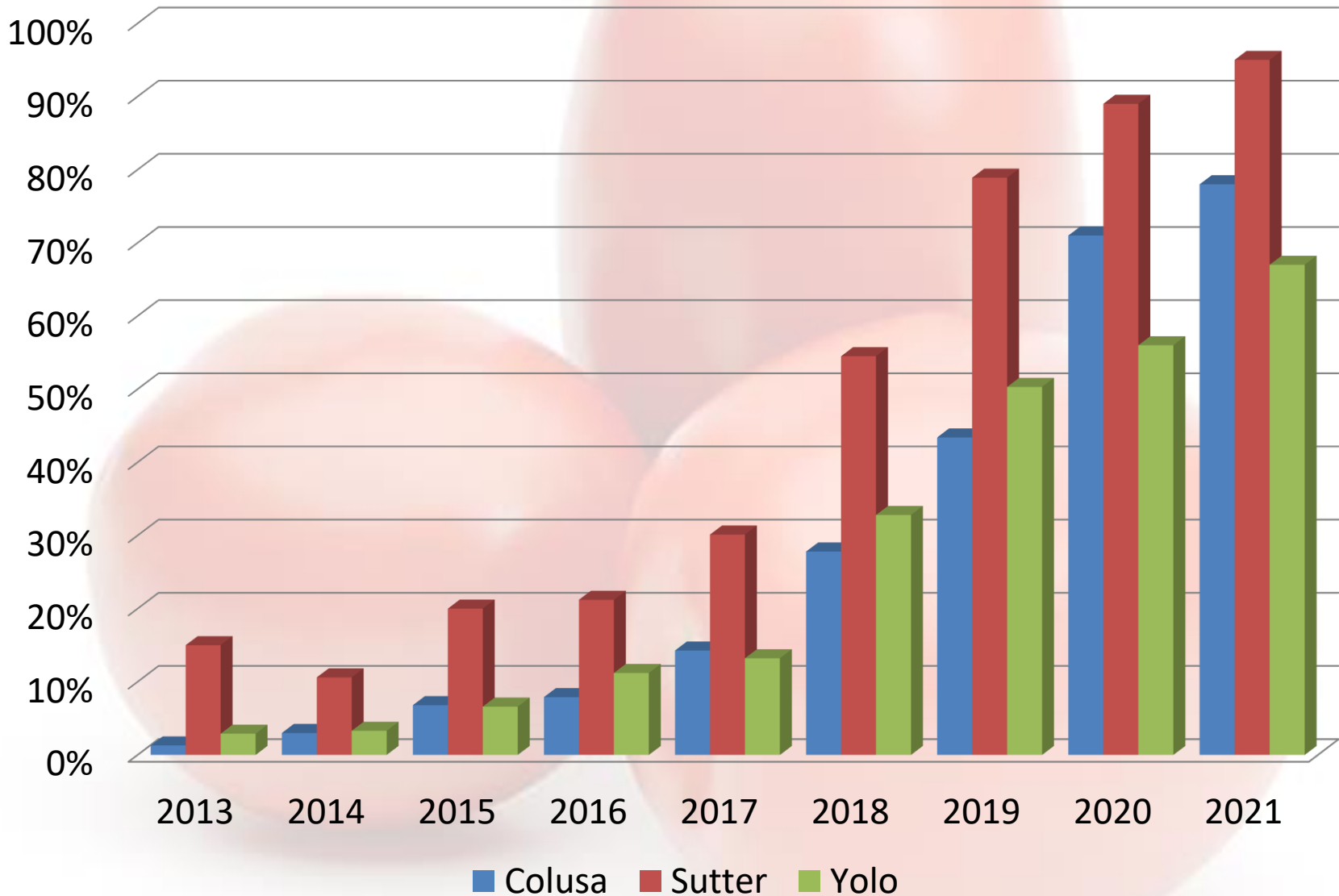
2021 F3 By Area



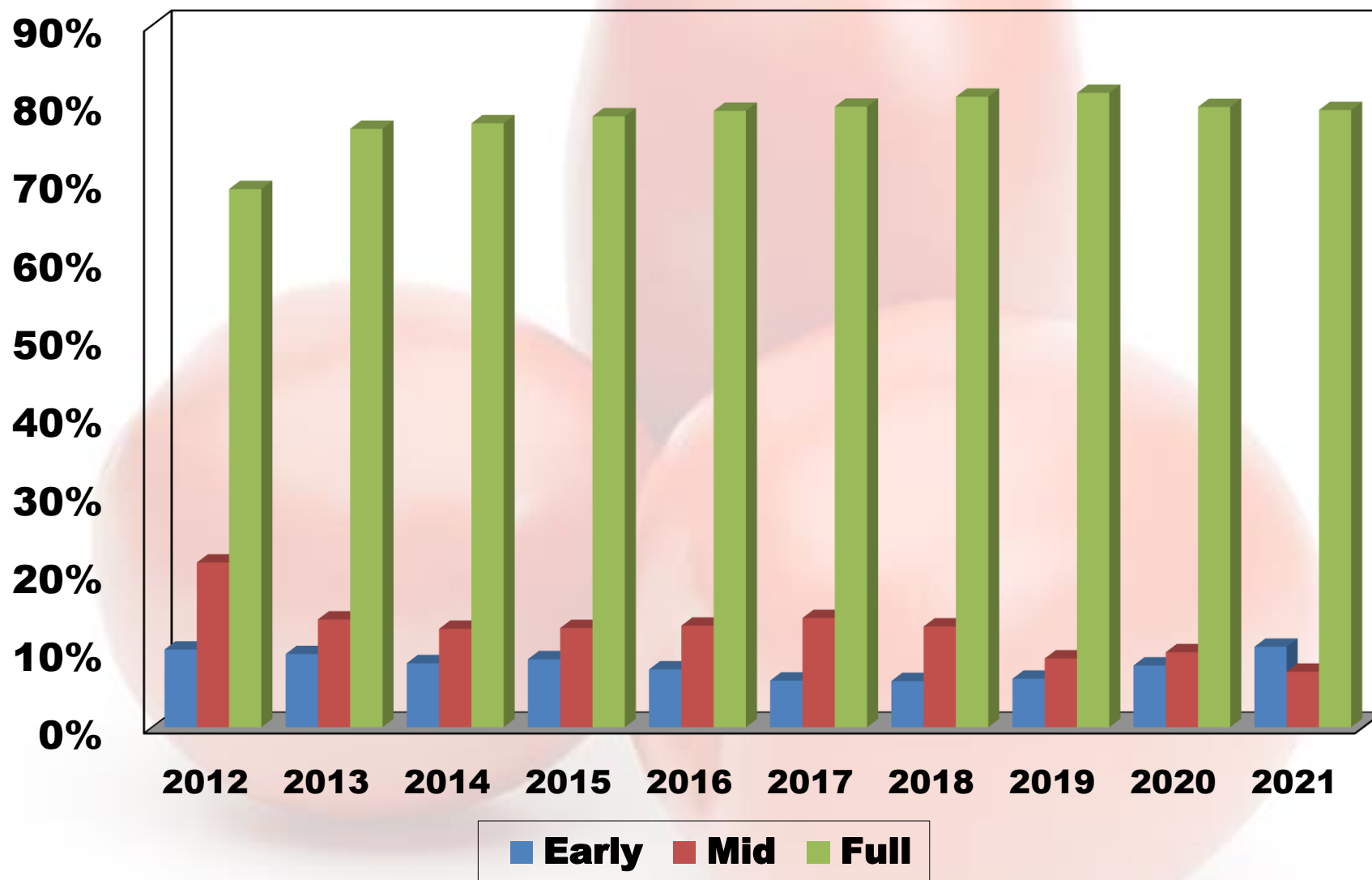
F3 Usage By Area-Recent History



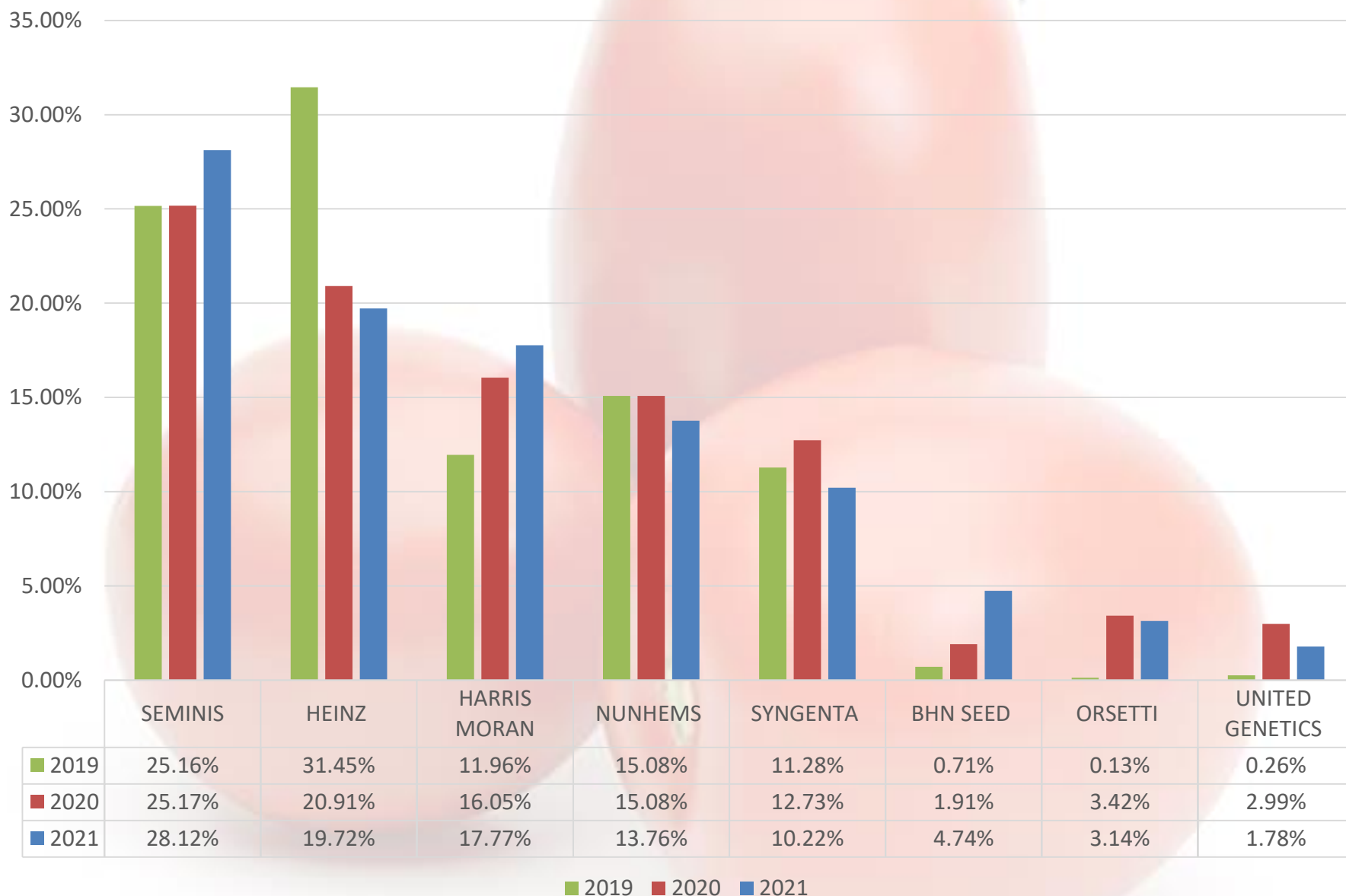
F3 Usage By County - North



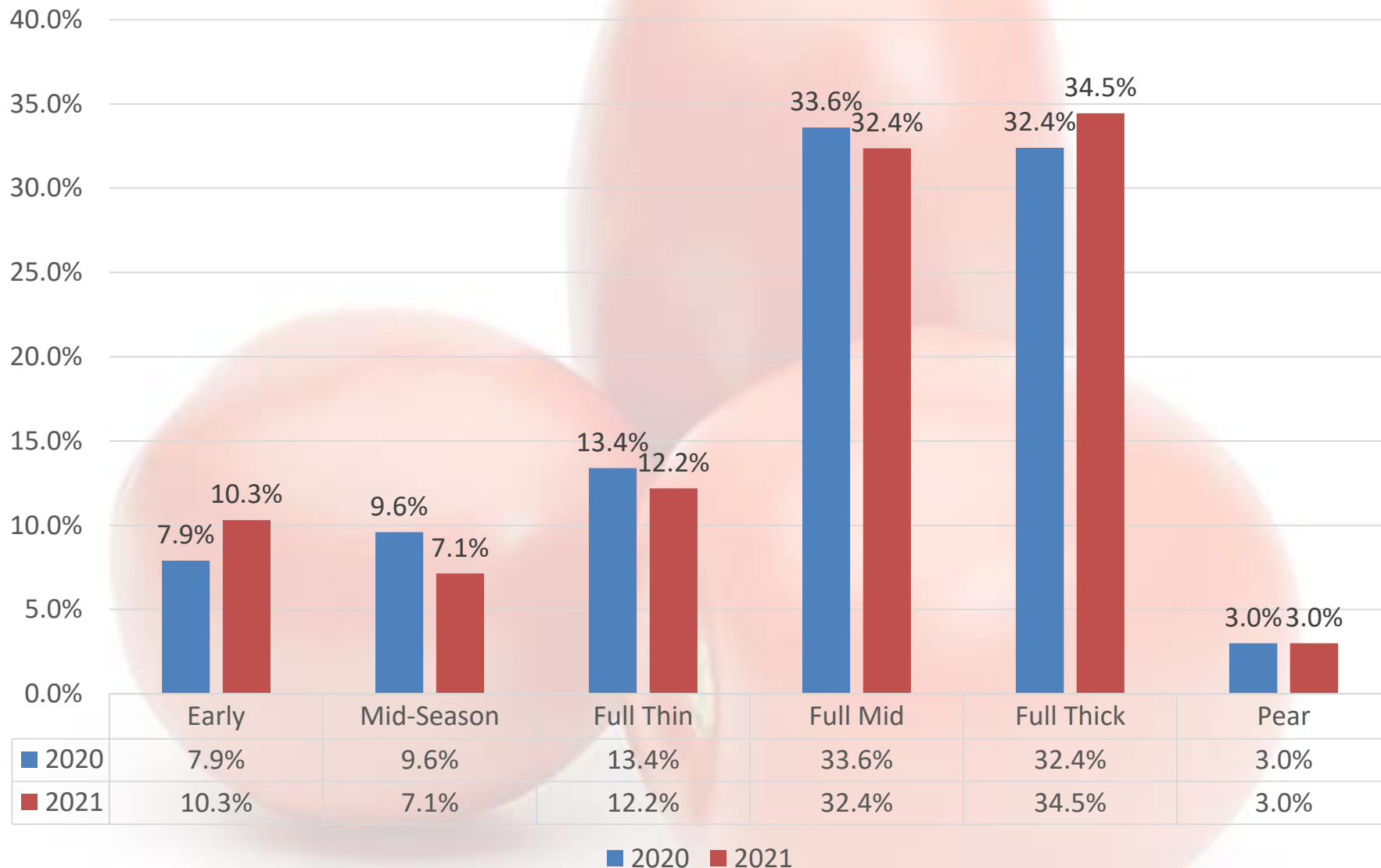
Maturity Comparisons Percent of Total Ca Pack



3 Year Seed Supplier Market Share



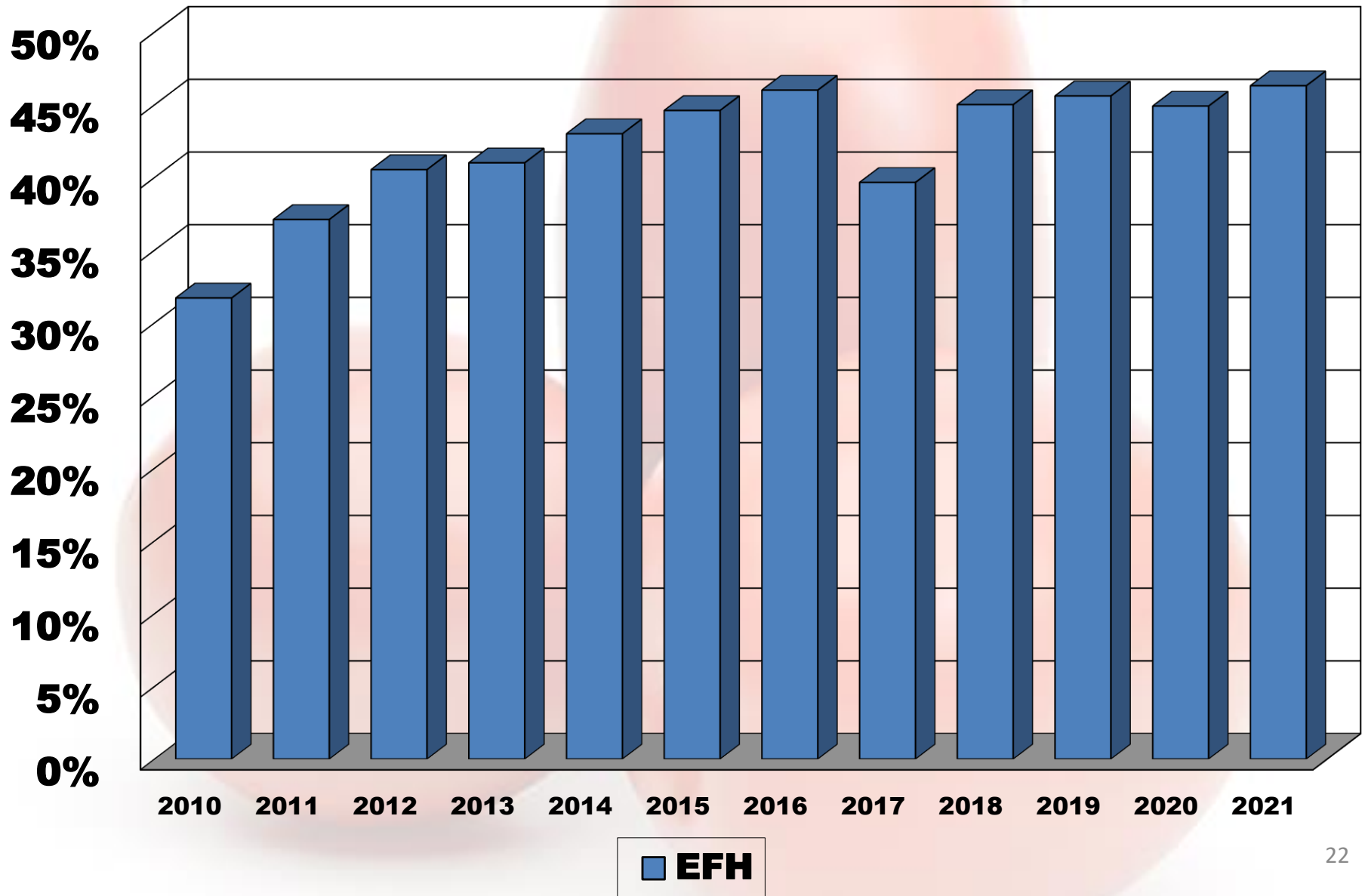
2020 - 2021 Market Segments



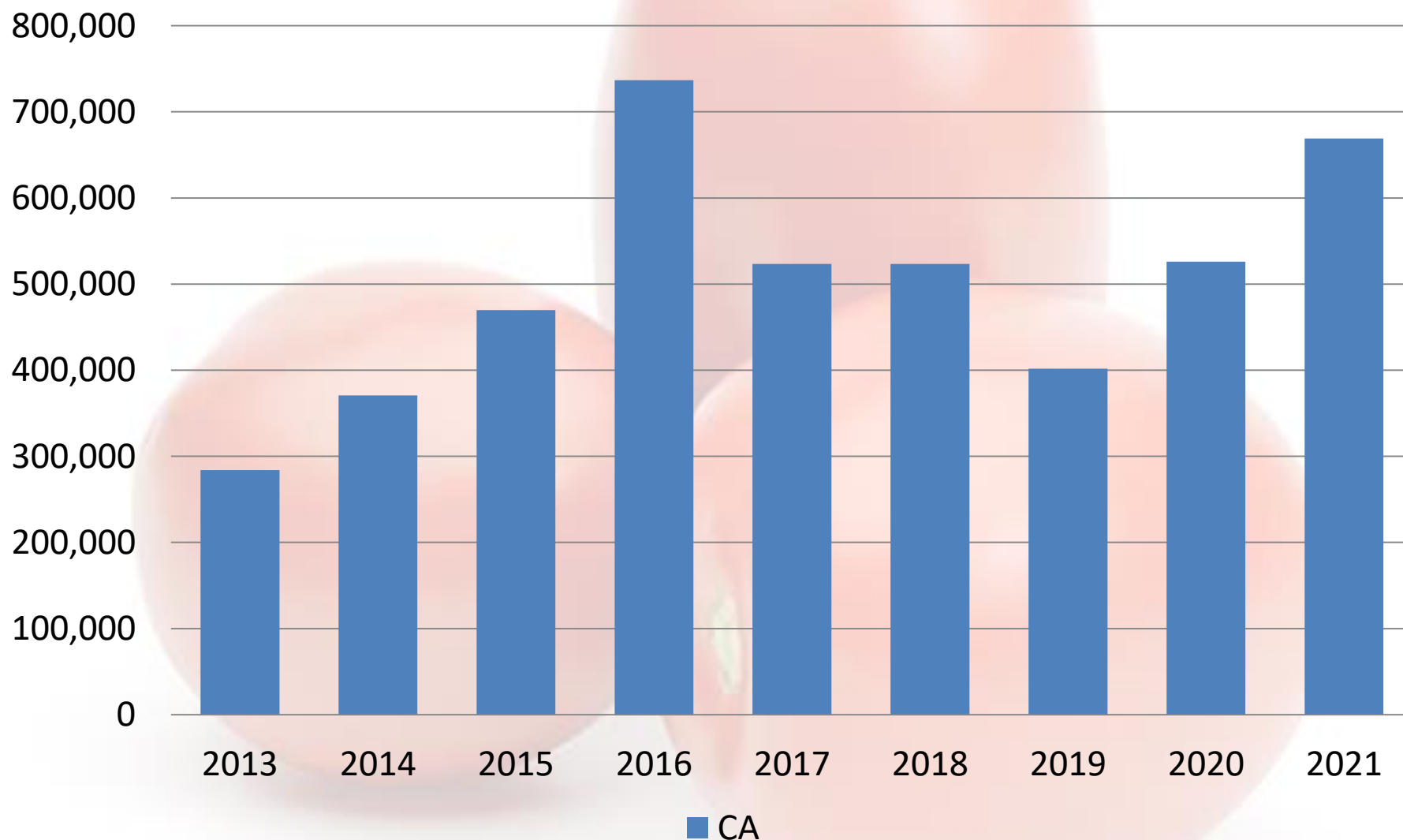
2020 & 2021 Variety Rankings in CA

| 2020 | | | | 2021 | | |
|------------|--------|-------|------|------------|--------|-------|
| Variety | Loads | % | Rank | Variety | Loads | % |
| 6428, N | 43,466 | 9.87% | 1 | 6428, N | 29,990 | 7.08% |
| 273, BQ | 24,303 | 5.52% | 2 | 1662, HZ | 22,598 | 5.33% |
| 1662, HZ | 23,597 | 5.36% | 3 | 4707, HZ | 14,612 | 3.45% |
| 8011, SV | 21,386 | 4.85% | 4 | 58841, HM | 14,332 | 3.38% |
| 0319, DRI | 15,169 | 3.44% | 5 | 273, BQ | 13,317 | 3.14% |
| 0811, BOS | 14,580 | 3.31% | 6 | 9014, SVTM | 12,741 | 3.01% |
| 9011, SVTM | 14,283 | 3.24% | 7 | 0811, BOS | 12,262 | 2.89% |
| 1428, HZ | 14,195 | 3.22% | 8 | 9013, SVTM | 11,646 | 2.75% |
| 4707, HZ | 13,348 | 3.03% | 9 | 4521, HM | 11,185 | 2.64% |
| 403, BQ | 13,288 | 3.02% | 10 | 9024, SVTM | 10,620 | 2.51% |
| 0311, AB | 13,192 | 2.99% | 11 | 9016, SVTM | 9,621 | 2.27% |
| 400, BQ | 12,103 | 2.75% | 12 | 0319, DRI | 9,057 | 2.14% |
| 5522, HM | 11,518 | 2.61% | 13 | 9011, SVTM | 8,686 | 2.05% |
| 5608, HZ | 11,061 | 2.51% | 14 | 1428, HZ | 8,652 | 2.04% |
| 2401, HZ | 9,630 | 2.19% | 15 | 5522, HM | 8,258 | 1.95% |
| 5235, HM | 8,843 | 2.01% | 16 | 43, BP | 8,253 | 1.95% |
| 9008, SVTM | 8,727 | 1.98% | 17 | 1082, SVTM | 7,914 | 1.87% |
| 58841, HM | 8,626 | 1.96% | 18 | 9008, SVTM | 7,800 | 1.84% |
| 9016, SVTM | 8,521 | 1.93% | 19 | 5235, HM | 6,666 | 1.57% |
| 2756, SV | 7,967 | 1.81% | 20 | 8163, HM | 6,578 | 1.55% |

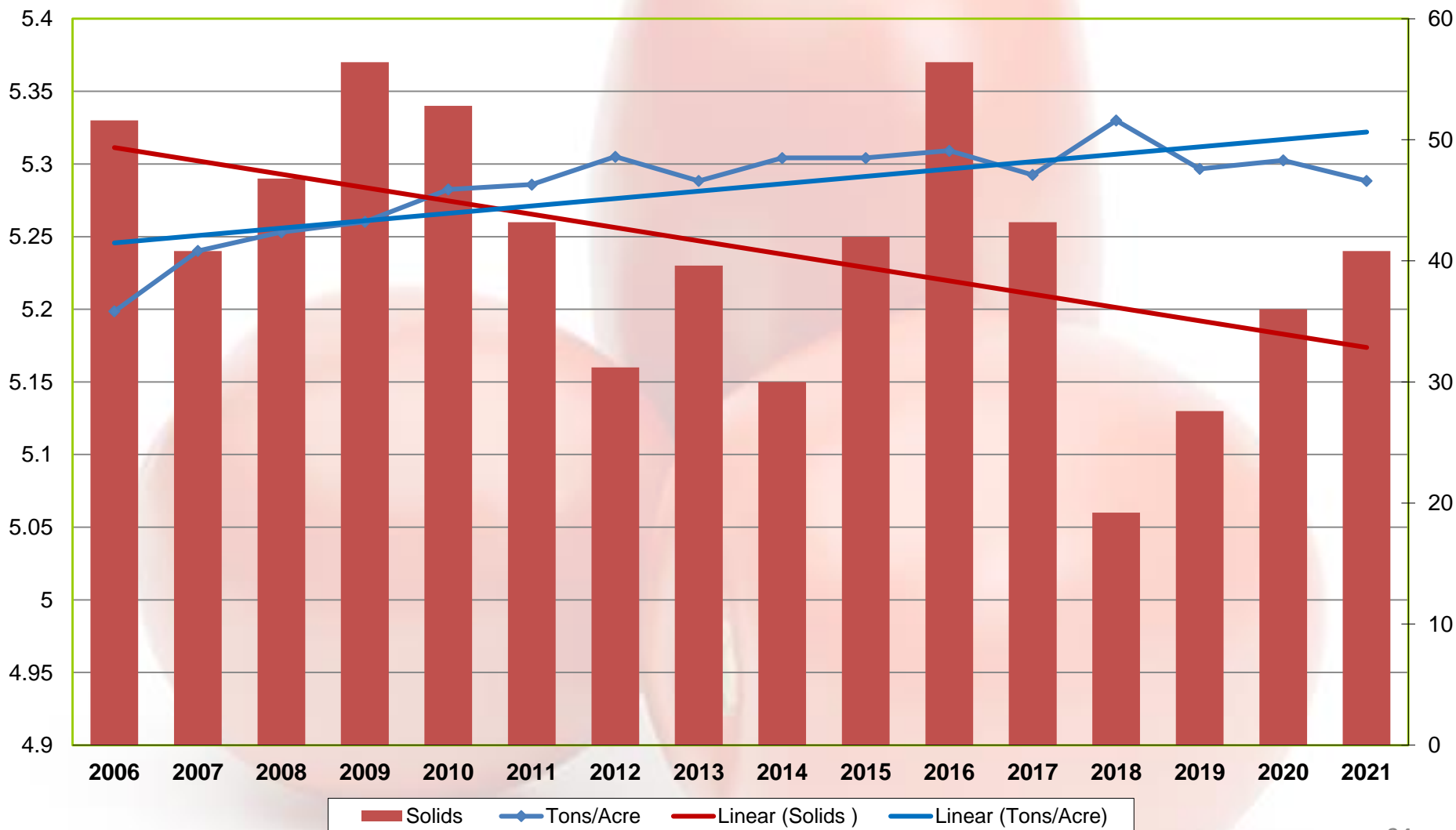
EFS/EFH Usage Percent of Total Ca Pack



CA – Organic Tonnage By Year



Statewide Solids Compared To Yield 2006 To 2021



Three ripe, red tomatoes are arranged on a white background. One tomato is positioned at the top center, slightly behind the other two. The other two are in the foreground, one to the left and one to the right, both slightly overlapping each other. They are all bright red with some green at the stems.

Questions?