Tomato processing in Italy

With nearly 5 million tonnes processed on average over the last five years, Italy is the biggest tomato processor within AMITOM. Since the creation of AMITOM in 1979, Italian production has more than doubled, the biggest increase in Europe after Spain.

The cultivation of processing tomatoes is possible in many parts of Italy, but three regions account for almost 90% of the production:
* Puglia, with just under 40%;
* Emilia-Romagna, with more than 40%
* Campania, with about 10%.

- **Southern Italy**

The Puglia region now only represents about 40% of the national production. It is an area where factories have started to move to or be set up recently, so tomatoes have to be transported by lorry to processing plants in Campania, 200 to 300 km away. The main production zone in Puglia is around Foggia, but processing tomatoes are also grown further south around Bari and Brindisi.

The Foggia area is a large plain with soils alternating between a predominance of clay and a predominance of sand. North of Foggia, tomatoes are mainly produced for paste, whereas in the south they are grown primarily for canned peeled tomatoes. The climate varies between extremes, with frequent frost in the early Spring, and scorching heat with very little rain in the Summer. Frequent winds often wither the plants and increase water requirements, but they have the advantage of improving the health condition of the plants, reducing the risk of bacterial diseases. Water is plentiful but rather expensive to use, which is why drip irrigation is particularly developed in that zone. Sprinklers are the most common alternative to drip systems.

The size of farms growing processing tomatoes is variable. Some farms grow 2 to 3 hectares of tomatoes on ten hillside hectares, which are then harvested manually. Other farms in the flat plains cover several hundred hectares including a hundred hectares of tomatoes. Growers have set up cooperatives, themselves part of larger Organizations of Producers, whose main task is to make joint offers and sign contracts with processing firms. They also supply seeds, fertilizers and other treatments, and own harvesters. The main varieties for tomato paste are now almost exclusively hybrids. In the Campania region, the traditional variety has been awarded the protected origin label: "pomodoro San Marzano dell'agro Sarnese Nocerino".

Direct seeding is rare and only used for the cultivation of paste tomatoes, which are sown with precision sowing machines using coated seeds. For peeling tomatoes, all the acreage is planted with plug seedlings. Tomatoes for paste (less than 30% of the volume) are all machine harvested, but those for the production of canned tomatoes are mostly harvested manually, although machine harvesting is developing rapidly. In the largest farms which use drip irrigation, yields often exceed 100 t/ha with 75 t/ha on average.

- **Northern Italy**

Processing tomatoes are mainly grown around Parma and Piacenza, but also around Ferrara where factories have developed significantly and with small production zones north of the Po and in Piedmont. Soils near Parma and Piacenza are predominantly clay, with sandy-clay in Ferrara and silt north of the Po. The climate is ideal for tomato cultivation with notably a big difference between day and night-time temperatures, producing a good color in the fruit. There is a risk of late drought and of hail storms. The production of processing tomatoes in this region is completely mechanized and controlled by experts. The use of hybrids and plug seedlings is almost complete. Irrigation is still partly applied by sprinklers, with coiled hose water guns, but drip irrigation, but drip irrigation becomes widespread. The harvest is totally mechanized with self-propelled Italian harvesters. Farm yields are 70 t/ha on average. In northern Italy, the farm price have dropped over the last few year to 82 t/ha in 2012. Since 2001, the production in northern Italy exceeds the southern one and in 2005, the production in northern Italy (including Tuscany and Umbria) exceeded that of the south of Italy. 40 % of raw tomatoes are processed by co-operative factories, which are members of ConfCooperative and 60 % by private companies which are members of AIIPA or Confapi.

Before the restructuring of the Italian tomato processing industry which led to the current situation, nearly 70% of the production of tomatoes for processing was localised in the regions of the south of Italy (Campania, Puglia,...), the North only representing 30% of the volumes processed in the country. Over the last 20 years, the distribution of the surfaces has been profoundly modified and now the production is shared equally between the two regions.

Several reasons explain this reversal: in a first instance, because of the lack of crop rotation, as it has been the case in Campania over many years. A second reason is the gradual shift of the production of industrial tomato paste from the south to the north. The companies in the South of the country have carried on or specialised in the production of tomato products in small packaging, directly intended for retail sales and more profitable.

Moreover, the industry in the North of the country seems to have achieved the necessary concentration which has led to the rise of ten or so major companies. These private or cooperative firms are relatively specialised on some products (passata, diced tomatoes, sauces, etc.), on some types of services (co-packing, etc) or “tailored” production, depending less on the market variations (niche products, contracted production with given volumes and strict specifications,...).

In 2011, 47% of the volume in the North was processed into tomato paste, 32% in diced tomatoes, 18% in passata, 2% in sauces and 1%in other products.

An inter-professional organization « Distretto del Pomodoro da Industria del Nord Italia » was recently set up to federate all the entities involved in the industry.

The Italian tomato processing industry is represented within AMITOM by three organizations:
-ANICAV, representing processors in the south of the country
-AIIPA, representing private processors in the north of the country
-ConfCooperative, representing cooperatives