Prospects for Decarbonizing California’s Tomato Processing Industry
Tomato Processing in California

• California is the largest producer of processing tomatoes in the world, with an average of nearly 1/3 of the world tonnage.
• The growing conditions, which include warm, dry summers, are ideal in the Mediterranean climate that is prevalent in the Central Valley.
• The harvest season for tomatoes usually begins in early July and extends to mid to late October.
• The development of determinate tomato varieties, which ripen all at once, and mechanical harvesting, helped to spur the growth of the industry in California.
Global Tomato Processing in 1989: 22 million T

- California: 7,790
- Mexico: 282
- Canada: 520
- Other US: 816
- Argentina: 400
- Chile: 300
- Brazil: 790
- Greece: 1,500
- Tunisia: 337
- Algeria: 200
- Turkey: 310
- Hungary: 302
- Bulgaria: 555
- Portugal: 617
- France: 3,867
- Spain: 847
- Italy: 3,242
- Israel: 310
- China: 100
- Taiwan: 262
- Australia: 185
Global Tomato Processing in 2017: 37.47 million mT

- California: 9,492
- Canada: 430
- Italy: 5,200
- Ukraine: 650
- France: 195
- Poland: 175
- Russia: 400
- Spain: 3,300
- Portugal: 1,554
- Portugal: 1,554
- Russia: 400
- Iran: 1,000
- Israel: 300
- Egypt: 600
- Tunisia: 643
- Greece: 400
- Argentina: 488
- Brazil: 1,450
- Chile: 1,080
- South Africa: 160
- India: 130
- Thailand: 260
- Greece: 400
- Turkey: 1,900
- China: 5,940
- Australia: 185
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<td><strong>Total Top 10</strong></td>
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<td><strong>39,372,000</strong></td>
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<td><strong>32,901,000</strong></td>
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<td><strong>28,617,000</strong></td>
<td><strong>34,748,000</strong></td>
<td><strong>35,819,000</strong></td>
<td><strong>32,407,000</strong></td>
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<td><strong>Top 10 vs Global</strong></td>
<td><strong>87.8%</strong></td>
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<td><strong>86.6%</strong></td>
<td><strong>87.4%</strong></td>
<td><strong>85.6%</strong></td>
<td><strong>86.2%</strong></td>
<td><strong>87.1%</strong></td>
<td><strong>86.6%</strong></td>
<td><strong>85.1%</strong></td>
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<td><strong>Other</strong></td>
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<td><strong>Global Processing</strong></td>
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<td><strong>33,419,000</strong></td>
<td><strong>33,197,000</strong></td>
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<td><strong>41,374,000</strong></td>
<td><strong>38,072,000</strong></td>
<td><strong>37,797,000</strong></td>
<td><strong>34,328,000</strong></td>
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Tomato Processing in California

- Processing tomatoes are harvested at the peak of ripeness and then delivered to processing plants.
- This allows processors to lock-in the nutrients and flavors present in the ripe fruit.
- Various products are made with the tomatoes, but the vast majority of the overall tonnage is used to produce bulk tomato paste and diced tomatoes that can easily be shipped and used by food processing facilities around the country and around the world to make the tomato based products that we are all familiar with.
The processes that produce tomato products, like tomato paste and diced tomatoes, use heat in many steps.

That heat is supplied by steam, which is created by combusting natural gas in large boilers.

Making tomato paste requires evaporating water from tomato juice to concentrate the amount of solids from an initial 5% to 30% or more.

Most tomato processing is aseptic, and steam is used to create a sterile environment. Aseptic products don’t require refrigeration during storage and won’t spoil.
Focus on Energy Efficiency - Boilers

- Boilers are tuned prior to each season to deliver maximum efficiency across a wide range of firing rates.
- Feedwater economizers preheat water entering the boilers with the residual heat from exhaust gases, increasing overall efficiency.
- Returning hot condensate, and even hot tomato evaporate water, to the boilers reduces the need to preheat boiler feedwater.
- Virtually all steam pipes and heat exchangers are insulated to prevent heat loss.
Evaporation of water from tomatoes to create tomato paste is a critical process that is also very energy intensive.

Steam from the boilers is used to drive turbines coupled to large evaporator circulation pumps and vapor compressors. The exhaust steam from these turbines is used to heat the tomato paste in the evaporators, effectively using a large % of the overall energy contained in the natural gas fuel.

Multiple effect evaporators and Mechanical Vapor Recompression (MVR) evaporators are used to increase the amount of water evaporated for each pound of steam.
Real food that matters for life’s moments
Double Effect Evaporator
Triple Effect Evaporator
• Electric motors drive numerous pieces of equipment, including pumps, fans, air compressors, etc.

• Using high efficiency models paired with automated controls and variable speed drives (VSD) helps to minimize electric use, and indirect emissions from electricity generation.

• As the share of renewable electricity grows in California’s power mix, the impact of indirect emissions from power is lessened.
Tomato processing uses processes that have been fine-tuned to maximize efficiency, throughput, and reliability. These are all key factors in controlling the cost of production.

Because processed tomato products are produced in many areas throughout the world and can be cost-effectively shipped, they are essentially a commodity, and low cost producers are able to gain market share.

Current alternatives to using natural gas to create the steam for process heat are either much too expensive, or not able to operate at sufficient capacity to be implemented commercially.
Prospects for Decarbonizing Tomato Processing

• Programs investing in innovative technologies are helpful, and may help drive improvements in the economics of processing equipment and techniques that reduce the carbon intensity of the industry.

• The amount of emission reductions required to keep pace with the reductions in the GHG cap will not be able to be met just by incremental efficiency improvements, because most of the “low-hanging fruit” has already been picked.

• Electrification of steam generation would require major investments in electrical infrastructure and electricity costs that are an order of magnitude lower than what they are currently to be competitive.

• If an internationally accepted GHG emission control mechanism is not developed, California producers are likely to be at a competitive disadvantage, leading to emission leakage.
The Food Production Investment Program uses funds from the Greenhouse Gas Reduction Fund.

It has two tiers that fund carbon reduction projects in food processing companies.

Tier I is focused on drop-in energy technologies and Tier II is focused on emerging energy technologies.

Companies are required to provide a minimum of 35% matching funds for Tier I and 15% matching funds for Tier II.

Awards to Tomato Processors thus far have been for MVR pre-evaporators or electrical micro-micro-grids.
What’s the “Next Big Thing”?

- Concentration without evaporation
- Renewable fuels as affordable as fossil fuels and identical in function
- Extremely cheap renewable electricity for electrification
- Solar thermal
- Something else???