

WPTC CROP UPDATE AS OF 5 SEPTEMBER 2025

AMITOM COUNTRIES

(Information collected during a videocall on Wednesday 3 September)

BULGARIA

Half of the surfaces have now been harvested and factories are running at full capacity. The quality is better than last year with an average brix slightly over 5. The season should finish on target at the end of September.

EGYPT

Harvesting expected to last till mid or 20 September, then we will have a transition period till 10 or mid of November to start the harvesting of **Nili** crop from (**Sharkia, Beni Suif, Al-Fayoum** & few quantities from **Al-Minya** – which has its peak during winter crop). The forecast remains the same at this moment.

FRANCE

To date 105,000 tonnes have been processed which is 60% of the total forecast which remains unchanged at 175,000 tonnes. Average brix is 5.17 and the penalties level at 6.8%. Quality is good now, but fruits were damaged in some fields as they were harvested overmature during the heatwave in the beginning of august. It rained both in the **South-East** and the **South-West** in the last few days, with a very heavy localised storm, and more rain is perhaps expected tomorrow everywhere and also next week in the **South-West**, so a difficult beginning of September seems to be foreseen.

GREECE

The harvest is progressing well and there are no issues to report. The **South** should finish by next Monday and the **Centre**, where 75% of the crop has been harvested to date, around 20 September.

HUNGARY

By the beginning of September, we were halfway through the season. Harvesting was hampered by regional rains, but processors were able to operate continuously. Yields and quality are both excellent, and we can operate with extremely high Brix. The annual volume forecast is currently unchanged, but a minor correction may be necessary depending on the remaining areas.

IRAN

The situation has improved as, after a poor harvest in the **South**, the season is going well in the **North** and **West** of the country with factories running at full capacity and expected to do so until the end of September. Temperatures are now good at 30-32°C and may drop but no rain is expected soon. Consequently, the total production could reach 1.8 million tonnes if good conditions continue, although the forecast remains 1.6 million tonnes for now.

ITALY

In the **North**, the last figures released by OI Pomodoro Northern Italy reports as for 24 August a total volume processed of 1.62 million tonnes with an average brix of 5,21 and penalties 4,62. Quality remained good but there are some excess of green tomatoes due to staggered fruiting on the plant. Last week and at the start of this one we had rain in all northern regions from **Alessandria** to **Ferrara** (with some heavy rain in **Mantova** and **Verona** with more than 100 mm) with several days in which it was not possible to harvest tomatoes and the factories remained closed.

The yield in the fields remain lower than average and despite the highest surface ever planted (around 45,000 hectares) it will be difficult to get the target of 3.2 million tonnes and we revise the number to 3 million tonnes considering the situation and the % of hectares already collected. The weather forecast for the next two weeks is good. Let's see how it goes and if late crops can recover something on the average yields.

In the **Centre-South** the situation is not good with most factories now at less than 50% capacity as tomatoes are not ripening. There is a split maturation with some ripe tomatoes while the third crown still green so many green tomatoes are left in the fields. Many greens are also delivered to the factories, so the processing yields now are the worst recorded in the last ten years, after a good start. Processors are paying higher prices than initially expected especially for long tomato varieties. It will be a long crop from 15 July to an expected end in early October.

The forecast for Italy is reduced from 5.8 to 5.5 million tonnes for now but the final level will depend on a good September.

PORTUGAL

The crop is delayed with only about 30% of the volume processed to date. The ripening of tomatoes is irregular, which means that in some areas there is 25-30% of green tomatoes left in the fields after harvesting. There are also fields which are still too green and growers need to wait for the ripening. The most delayed fields are still in the development stage; these were in areas flooded the longest after the rains in April and are the most late fields. Even with all this irregularity in the tomatoes fields we are having very good colour, and while brix was low in the beginning, now it is better than average.

Therefore, the forecast is reduced from 1.35 to 1.3 million tonnes, but the next three weeks will be crucial to advance the crop even if going into October (not sure for how long) will be inevitable.

SPAIN

The harvest is late and as of 31 August only 47% of the expected overall volume had been processed, when normally it is about 63%. About 62% of the target has been achieved in **Andalusia** where the first factory is expected to close around 9-10 September, and only 20 to 40% in **Extremadura** depending on the area where the harvest is expected to finish around 10 October. Yields are on average down by 20% in **Andalusia** and they fluctuate in **Extremadura** but are generally also lower than usual. Fortunately, brix levels are generally higher than normal. Temperatures are now cool, but rain is forecast this weekend.

The total forecast is reduced for now from 2.5 to 2.4 million tonnes, but the final production will depend on a good September harvest. There is no factory running at full capacity.

TUNISIA

As of 1 September 2025, four units remain in operation, with a total processed volume of 920,000 tonnes of tomatoes.

TURKEY

The **southern** area is as of today finished harvesting. The **Bursa** area is around 50% through the harvest with an expected increase in harvest speed over the next 2 weeks due to bunching in the late planting from the high temperatures. There is also a lower yield in the later harvest and due to this we will reduce our forecast to 2.2 million tonnes. The **Konya** region started the harvest last week and is going on.

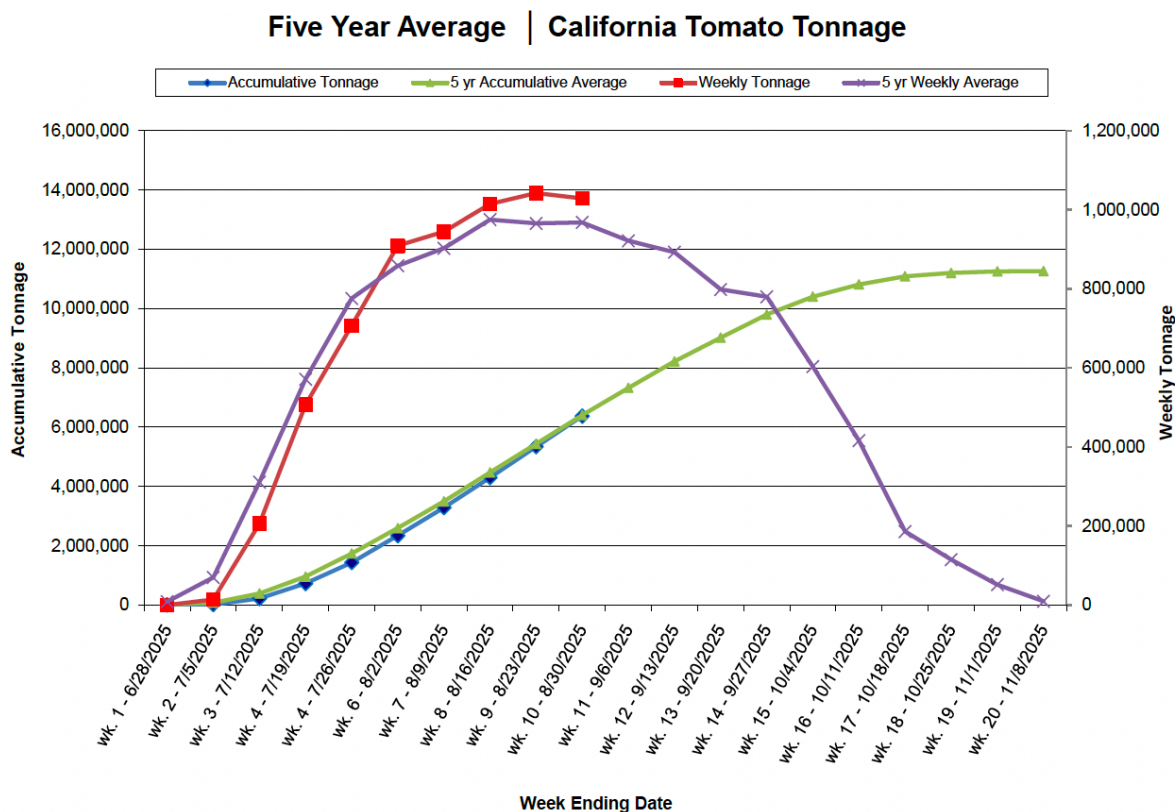
OTHER COUNTRIES

BRAZIL

Due to weather problems like cold temperatures which are below averages this season, a reduction of about 14% in the tomato crop compared to 2024 season or 7% below the previous numbers for the current season is expected. The revised forecast for 2025 is thus 1.42 million tonnes.

CALIFORNIA

The estimate is to process 1,040,143 short tons (10,015,319 metric tonnes) this week. At the end of this week (week ending 6 September) we will have processed 7,411,803 short tons (6,723,146 metric tonnes). There is very little difference from the last 3 reports. The crop continues to perform at or above contracted levels statewide. Overall quality continues to be very good in all aspects. The latest USDA/NASS estimate was released last week. The total tons expected increased to 11 million short tonnes (just under 10 million metric tonnes) from the May estimate of (10.3 million tons (9.3 million metric tonnes)).



CANADA

Harvest is approximately 30% complete and the crop looks good with above average yields and good colour. There is some concern that the cooler weather we've been experiencing may slow maturity in the late planted crop, delaying harvest.

CHINA

There is no major difference on the forecast to date but it will very probably go further down. More details will be available soon.

JAPAN

There is no change of the forecast of 25,000 tonnes from 420 hectares. Harvesting is scheduled to continue until early September in northern **Tohoku** region and until the end of September in **Hokkaido** region, but harvest yields may be reduced due to disease caused by high temperatures and drought.

SOUTH AFRICA

South Africa already processed 94% of the planned crop. The current projection is unchanged at 160 000 tonne for the 2025 season. Overall, it is a good season.

		World Processing Tomato Council		2023 FINAL		2024 FINAL		2025 FORECAST		AVERAGE 2022-2024	VARIATION 2025 vs 2024
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	37	Mem.	60	Mem.	43	Mem.	46	-28,3%	
		Egypt	600	Mem.	624	Mem.	780	Mem.	560	25,0%	
		France	160	Mem.	168	Mem.	175	Mem.	157	4,2%	
		Greece	390	Mem.	510	Mem.	500	Mem.	413	-2,0%	
		Hungary**	110	Mem.	120	Mem.	80	Mem.	103	-33,3%	
		Iran**	2 000	Mem.	1 400	Mem.	1 600	Mem.	1 733	14,3%	
		Israel	197	Mem.	184	Mem.	180	Mem.	177	-2,2%	
		Italy	5 404	Mem.	5 272	Mem.	5 500	Mem.	5 384	4,3%	
		Malta**	6	Mem.	7	Mem.	7	Est.	6	0,0%	
		Portugal***	1 500	Mem.	1 500	Mem.	1 300	Mem.	1 471	-13,3%	
		Spain***	2 600	Mem.	3 080	Mem.	2 400	Mem.	2 602	-22,1%	
		Syria**	40	Est.	40	Est.	40	Est.	40	0,0%	
		Tunisia	826	Mem.	999	Mem.	930	Mem.	831	-6,9%	
		Turkey	2 700	Mem.	2 700	Mem.	2 200	Mem.	2 583	-18,5%	
		Ukraine**	500	Mem.	550	Mem.	550	Mem.	390	0,0%	
	Subtotal AMITOM		17 070		17 214		16 285		16 497	-5,4%	
	of which members in EU		10 207		10 717		10 005		10 182	-6,6%	
	OTHER MEMBERS	Brazil	1 571	Mem.	1 650	Mem.	1 420	Mem.	1 618	-13,9%	
		Canada	520	Mem.	493	Mem.	575	Mem.	520	16,6%	
		California	11 556	Mem.	9 999	Mem.	9 979	Mem.	10 356	-0,2%	
		China	8 000	Mem.	10 450	Mem.	5 100	Mem.	8 217	-51,2%	
		Japan	26	Mem.	26	Mem.	25	Mem.	26	-3,8%	
	Subtotal Other Members		21 673		22 618		17 099		20 737	-24,4%	
	NON MEMBERS	Algeria*	1 350	Misc.	1 300	Misc.	1 300	Est.	1 283	0,0%	
		Czech Republic	25	Est.	25	Est.	25	Est.	25	0,0%	
Morocco*		100	Est.	100	Est.	100	Est.	100	0,0%		
Poland		250	Misc.	400	Misc.	400	Est.	275	0,0%		
Russia*		660	Misc.	670	Misc.	650	Est.	656	-3,0%		
Slovakia		20	Est.	20	Est.	20	Est.	20	0,0%		
USA excluding California		475	Misc.	475	Misc.	475	Est.	467	0,0%		
Subtotal Non Members		2 880		2 990		2 970		2 826	-0,7%		
Total Northern Hemisphere		41 623		42 822		36 354		40 060	-15,1%		
SOUTHERN HEMISPHERE	MEMBERS	Argentina	586	Mem.	630	Mem.	620	Mem.	614	-1,6%	
		Australia	110	Mem.	211	Mem.	211	Mem.	183	0,0%	
		Chile	1 150	Mem.	1 300	Mem.	1 340	Mem.	1 140	3,1%	
		Peru	150	Mem.	150	Mem.	160	Mem.	142	6,7%	
		South Africa	160	Mem.	140	Mem.	160	Mem.	140	14,3%	
		Subtotal members		2 156		2 431		2 491		2 219	2,5%
	NON MEMBERS	Dominican Republic	227	Est.	227	Est.	227	Est.	227	0,0%	
		India	162	Est.	162	Est.	162	Est.	162	0,0%	
		Mexico	40	Est.	40	Est.	40	Est.	40	0,0%	
		New Zealand	25	Misc.	39	Misc.	37	Misc.	39	-5,1%	
		Senegal	73	Est.	73	Est.	73	Est.	73	0,0%	
		Thailand	40	Est.	40	Est.	40	Est.	40	0,0%	
Venezuela		24	Misc.	14	Misc.	14	Est.	19	0,0%		
Subtotal non members		591		595		593		600	-0,3%		
Total Southern Hemisphere		2 747		3 026		3 084		2 819	1,9%		
GENERAL TOTAL		44 370		45 848		39 438		42 879	-14,0%		
of which members of the WPTC		40 899		42 263		35 875		39 453	-15,1%		
WPTC as percentage of total production		92%		92%		91%		92%			

Sources:

Mem.= WPTC members, Off.= Official data, Misc.= Other sources (industry contacts, press, ...), Est.= WPTC estimate, in the absence of reliable data

Notes:

Hemispheres are not defined in the strict geographic sense but as Northern Hemisphere: crop period mainly July to December & Southern Hemisphere: crop period mainly January to June

* Previously an AMITOM member ** AMITOM associate members *** Tomatoes produced in Portugal but processed in Spain are reported in Spain

DISCLAIMER:

WPTC does not guarantee or assume any liability for the accuracy of the contents of this report and shall not be responsible for any losses sustained as a result of relying on the contained information.