

WPTC CROP UPDATE AS OF 24 OCTOBER 2025

AMITOM COUNTRIES

FRANCE

The campaign ended at the end of week 42 (w/s 13 October) in the South-West with no losses. This is not yet the case in the South-East for a handful of hectares that were not yet fully ripe where the harvest could end at the end of week 43 or at the very beginning of week 44.

We have exceeded the volume contracted at the start of the season by nearly 10,000 tonnes and should therefore reach a total net volume of 185,000 tonnes with weighted penalties on volumes for each production run of 7.23% and a weighted brix of 5° for the factories that sent the information. The end of the season has been marked by difficulties in achieving ideal ripeness for harvesting the last plots, particularly in the south-east.

Over the last ten (even 13...) years, 2025 ranks among the best years, except that the other two, 2016 and 2017, with slightly more than 185,000 and 193,000 tonnes, included an additional factory that is no longer in production. We can therefore consider this to be the best season in the last ten years.

GREECE

The final volume is 515,000 tonnes.

IRAN

The 2025 Iranian tomato crop has been confirmed at 1.8 million tonnes, in line with earlier forecasts. Several factories are still in operation, and processing is expected to be completed by the end of October. Overall, the season is progressing as anticipated.

ITALY

The particularly long and complex 2025 season has ended with a production of 5.8 million tonnes from 78,695 hectares (see ANICAV end of season press release attached).

In the North, the final processed volume was 3.12 million tonnes (+27.6% compared to last year) thanks to large volumes delivered in September after a difficult start of the season. Average yield on the 45,030 hectares planted (+ 8%) were at 69.3 tonnes per hectare significantly lower than the five-year historical average of 73.2 t/ha. The season was, however, characterized by excellent quality, with a good colour and an excellent Brix level of 5, which resulted in a positive payment index, higher than the maximum recorded in the previous five years.

In the Centre and South, a total of 2.71 million tonnes were processed (-5.3% compared to 2024), but the production of whole peeled tomatoes dropped by 20% due to low agricultural and processing yields, while production costs increased notably due to a significant increase in the price paid for tomatoes (up to 40% above the planned average price).

PORTUGAL

The tomato season closed with the last processing unit on the 18th of October with a final volume of 1.3 million tonnes. 15,000 hectares were planted for this crop.

The first weeks of October (weeks 40, 41 and 42) the weather was still very good with temperatures of 28-29°C and during the night around 17-18°C /20°C. This means the crop was until the very last minute with a good temperature even if the time of sunlight was shorter. There were 2 days of rain and lower temperature which immediately rise again to the levels mentioned.

The last fields continued with good quality, very good colour and tomato were sound and ripe being harvested in the right moment. By the weeks 41-42 the quantity of tomato decreased as the usual process towards the end of the season.

Therefore, Portugal started with a forecast of 1.4 million tonnes, which was then revised for 1.35 million tonnes, and the last forecast was 1.3 million tonnes which was indeed the final number.

SPAIN

The campaign is finished in Andalucía and Extremadura. There are still some factories working in the Ebro valley that should finish this week or in the first days of the next. We estimate final production is about 2.4 million tonnes.

TUNISIA

As of 19 October, only one unit is still operating and the total quantities processed amount to approximately 938,000 tonnes.

TURKEY

The processing season ended on 23 October in Konya. The total production is confirmed at 2.2 million tonnes.

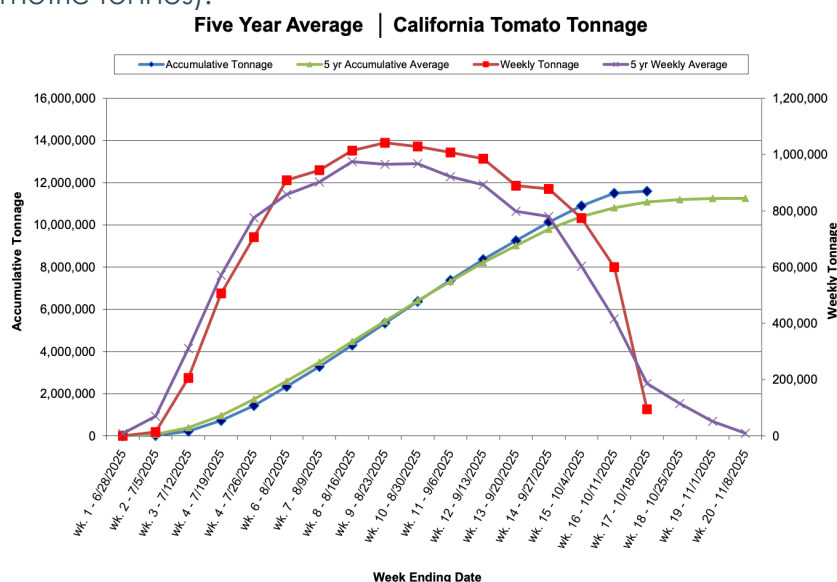
UKRAINE

Processing is not finished yet and the total volume should be between 450,000 and 480,000 tonnes.

OTHER COUNTRIES

CALIFORNIA

The estimate is to process 49,222 short tons (44,653 metric tonnes) this week. At the end of this week (week ending 25 October) we could have processed 11,650,182 short tons (10,568,867 metric tonnes). Due to a few rain storms the last 10 days the remaining processors have decided to end production this week. The final estimate will be close to the 11,650,000 short tons (10,570,000 metric tonnes).



CANADA

The harvest is now complete, having run later than normal, and preliminary numbers indicate that contracted tonnage was achieved. Despite some disease pressure, overall crop quality and yields were good.

JAPAN

Harvesting in Japan ended in the third week of October with a total volume processed of 22,000 tonnes, from 425 hectares planted. Growth was smooth nationwide until early June. However, high temperatures and drought from mid-June through August resulted in reduced plant vigour, poor fruit set, and smaller fruit, resulting in a significant decrease in production compared to the previous year.

		World Processing Tomato Council		2023 FINAL		2024 FINAL		2025 PRELIMINARY		AVERAGE 2022-2024	VARIATION 2025 vs 2024
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	37	Mem.	60	Mem.	40	Mem.	46	-33,3%	
		Egypt	600	Mem.	624	Mem.	780	Mem.	560	25,0%	
		France	160	Mem.	168	Mem.	185	Mem.	157	10,1%	
		Greece	390	Mem.	510	Mem.	515	Mem.	413	1,0%	
		Hungary**	110	Mem.	120	Mem.	97	Mem.	103	-19,2%	
		Iran**	2 000	Mem.	1 400	Mem.	1 800	Mem.	1 733	28,6%	
		Israel	197	Mem.	184	Mem.	180	Mem.	177	-2,2%	
		Italy	5 404	Mem.	5 272	Mem.	5 800	Mem.	5 384	10,0%	
		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.	1 000	Mem.	938	Mem.	832	-6,2%	
		Turkey	2 700	Mem.	2 700	Mem.	2 200	Mem.	2 583	-18,5%	
		Ukraine**	500	Mem.	550	Mem.	470	Mem.	390	-14,5%	
	Subtotal AMITOM		17 070		17 215		16 752		16 497	-2,7%	
	of which members in EU		10 207		10 717		10 344		10 182	-3,5%	
	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.	10 570	Mem.	10 356	5,7%	
China		8 000	Mem.	10 450	Mem.	4 900	Mem.	8 217	-53,1%		
Japan		26	Mem.	26	Mem.	22	Mem.	26	-15,4%		
Subtotal Other Members		21 673		22 618		17 487		20 737	-22,7%		
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 Norten Hemisphere		41 623		42 823		37 209		40 060	-13,1%		
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 Southen Hemisphere		2 747		3 026		3 084		2 819	1,9%		
GENERAL TOTAL		44 370		45 849		40 293		42 879	-12,1%		
of which members of the WPTC		40 899		42 264		36 730		39 453	-13,1%		
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.