World Processing Tomato Council

WPTC CROP UPDATE AS OF 5 OCTOBER 2025

AMITOM COUNTRIES

BULGARIA

The season is almost finished and should be fulled completed by 15 October. It was very good with high quality and brix values around 5. The total volume procesed is about 40,000 tonnes, of which 30,000 tonnes for the largest processor Balkan.

EGYPT

The Summer Season was exceptional this year in particularly for color achieving +2.2 in final products. There were many days with high temperatures in average +40° (as it become the norm every year) which put pressure on the ripening of fresh tomatoes, and also advancing the maturity of some quantities from the next Nili Crop in some areas "that were supposed to start in October". This eventually pressured the daily supply of tomatoes to factories to oversupply level on many days.
Summer harvesting finished on 20th September and now it is a transition period till next season (Nili Crop). Harvesting of Nili crop shall start from the second week of November till the end of December, while the Winter Crop (in southern governorates) starts from January till April.
For now the forecast of 780,000 tonnes is maintained for the year 2025 (Egypt crop is throughout the year, from January with the the beginning of Winter Crop till the end of Nili crop in December).
The initial forecast for 2026 is 800,000 tonnes.

Nili Crop (November to December.2025):
In (Fayum, Beni Suef, Minya & Asiut) governorates.

Winter Crop (January to April.2026):
In (Sohag, Qina, Luxor "Esna" & Aswan) governorates.

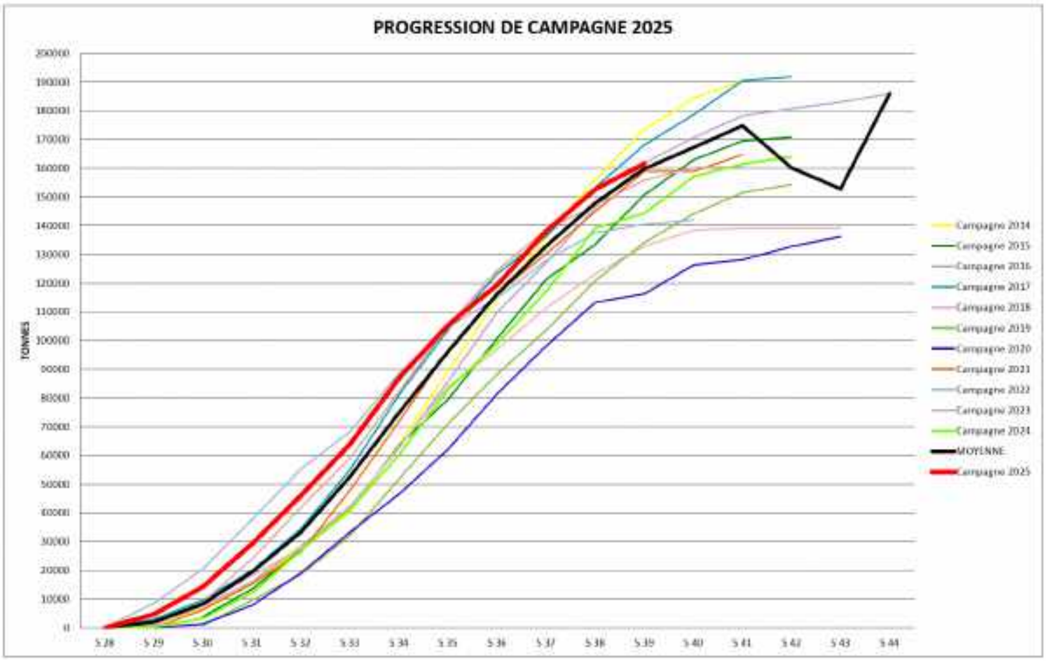
FRANCE

At the end of September the volume processed was 161,000 tonnes which is 92% of the contracts, with an average brix of 5 and 7.2% of penalties due largely to a lot of green tomatoes. In the Southwest processing it at 80% of contracts. There was a lot of rain in the Southeast last week with up to 130 mm in two hours in some, luckily less on the tomato fields but the weather is better this week, with wind drying the fields and no rain forecast. The harvest should finish in 15 to 20 days at the level of the contracts of 175,000 tonnes, maybe slightly more.

SONITO CAMPAGNE 2025

SITUATION DES TOMATES FRAICHES ENTREES EN USINES - FIN DE SEMAINE 39

Quantités	Brut livré (T)		173 022,204
	Net agréé (T)		161 546,860
	Réfactions	T	11 475,34
		%	7,21%
° BRIX moyen			5,06



GREECE

The last factory closed last Sunday. It was a very smooth season with a total volume processed of about 510,000 tonnes.

HUNGARY

The season ended last week, with excellent harvest averages and very good quality (average brix at Univer was 5.5, a historical best). According to the previous forecast, this year's processing season closed with a higher quantity, approximately 97,000 tonnes, of which two-thirds for Univer and one-third for Aranyfácán.

The weather was typically favourable for tomatoes after the cooler May, apart from the drought, but producers had the necessary capacities for irrigation. The dry weather helped to avoid crop protection problems. Therefore this year's harvest was outstanding in both quality and quantity. The average yeild was 97 t/ha, an outstanding result from about 1,000 ha.

IRAN

The crop is delayed and factories will still be running for another 2 to 3 weeks or maybe until the end of October. Some rain in the north did not really affect the season. The forecast is confirmed at 1.8 million tonnes. The main challenges are due to the political tensions causing uncertainties on the markets.

ITALY

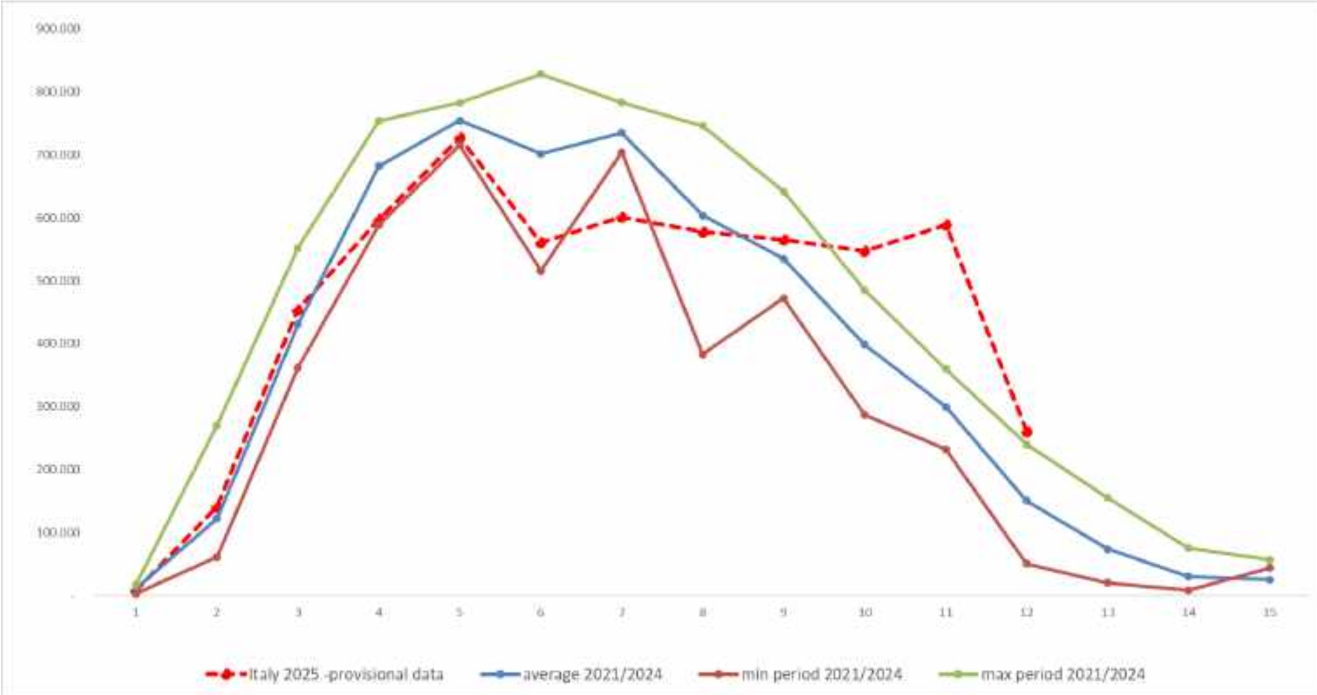
In the **North**, the last official figures show that as of 21 September, 2.85 million tonnes had been processed of which 350,000 tonnes in the last week (week 38), with an average brix of 5.05, 4.9% penalties and a payment index of 101%.

In the last week (week 39) very small volumes were processed due to widespread rains, especially in the West, with around 80 mm in some areas. The weather is better this week and harvesting has fully resumed. The season is however nearing the end with many factories already closed and the others closing at the end of the week. Only one factory is expected to operate next week. The total forecast is now 3.25 million tonnes.

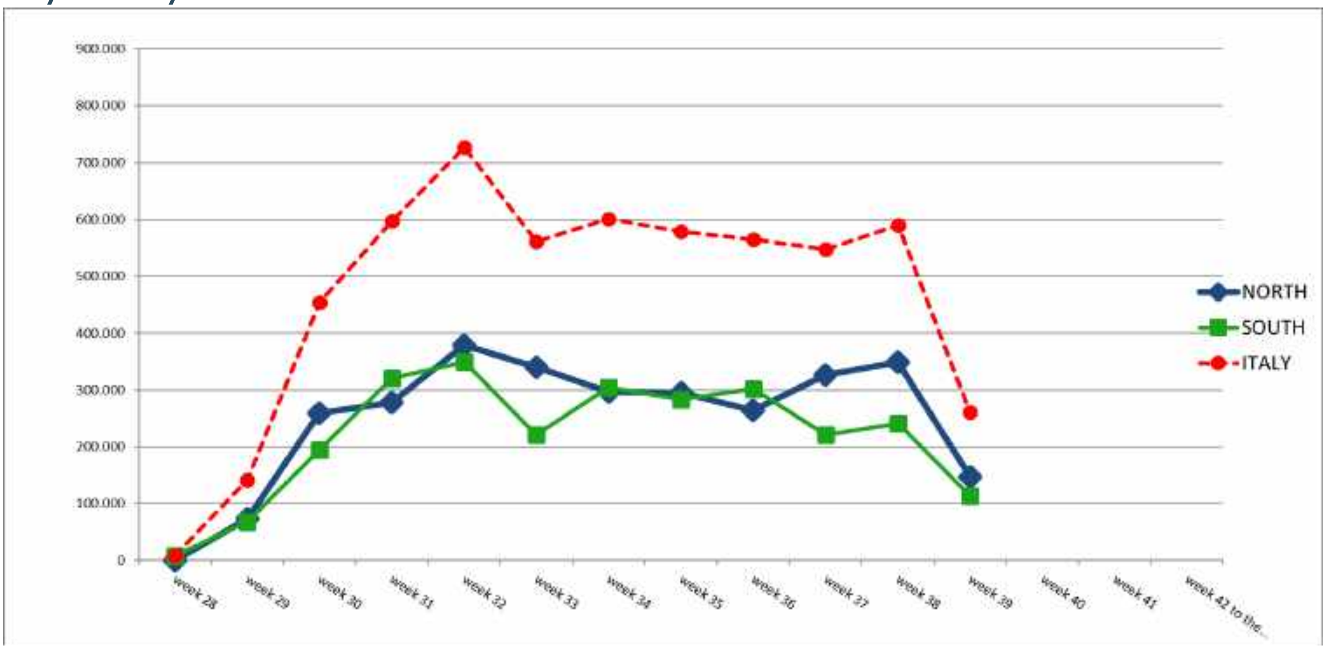
In the **Centre and South**, the weather in September has been very good, better than average, and the volume processed is higher than expected, notably for the long varieties. Quality remains good, with good colour although brix levels have decreased as is normal for the season. Many factories closed at the end of September although some are still running. The expectation is now 2.675 million tonnes, bringing the total for Italy back to 5.7 million tonnes.

	PROCESSED QUANTITY				
	Season 2021	Season 2022	Season 2023	Season 2024	Season 2025 - estimate
CENTER and SOUTH	2.968.676	2.591.608	2.605.528	2.867.254	2.675.000
NORTH	3.094.768	2.892.084	2.802.100	2.438.474	3.025.000
ITALY	**6.063.444**	**5.483.692**	**5.407.628**	**5.305.728**	**5.700.000**
		9,56%	*-1,39%*	*-1,88%*	*7,43%*

Italy: Trend 2021 – 2025 (provisional)

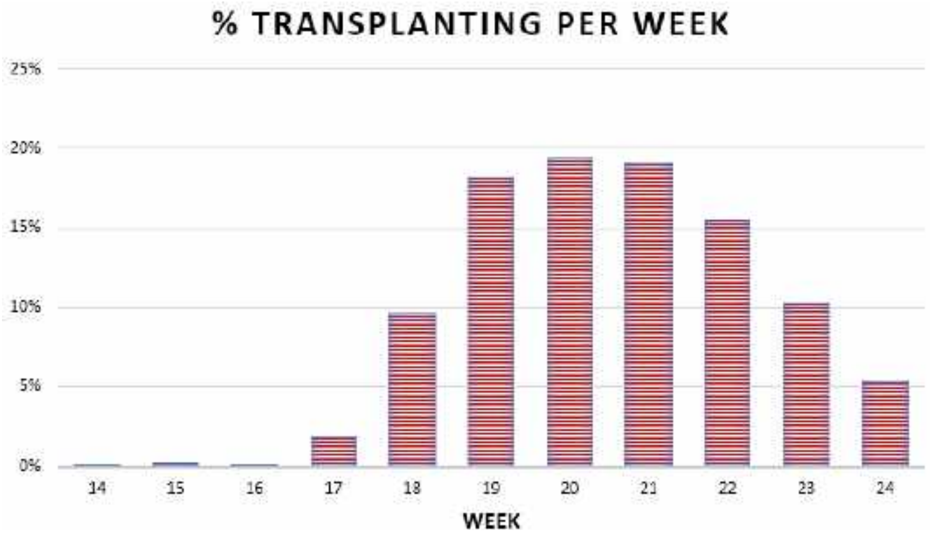


Italy: Weekly trend 2025 – 39° week



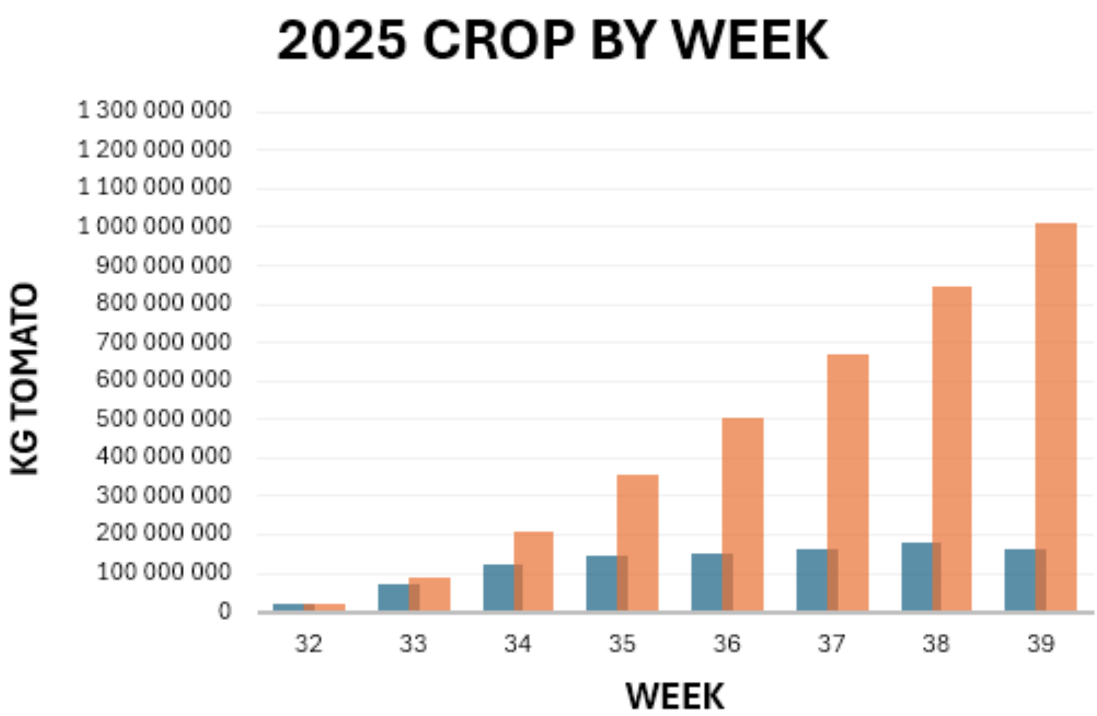
PORTUGAL

Late spring rains forced planting to start later than usual: instead of the end of March, it could only be normalized from May onwards. Stable weather conditions allowed this operation to continue until the second week of June.



Due to delayed transplanting, harvesting and processing could only begin in week 32, with just two factories in operation. In week 33, most processors started running at reduced speed, gradually increasing their daily capacity between the end of week 32 and the beginning of week 34. From week 35 onwards, a few were operating at 50%, while the remaining units gradually reached full capacity.

In this campaign, not all units were able to operate at full capacity, as the early fields produced low yields, with volumes only improving from week 35 onwards. Although the initial estimated volume for Portugal is expected to show a decline, some processors will achieve their production targets.



Overall, the ongoing crop has demonstrated very good quality results in the majority of processing units.
Although this crop presented unique characteristics due to delayed transplanting and harvesting – occurring approximately two weeks later than usual – the quality of Portuguese production was not compromised. Portuguese tomatoes are renowned for their balanced

sugar-to-acid ratio and, in particular, for their strong colour. In the 2025 crop, this attribute was further enhanced, with consistently high values recorded throughout the season.
On the other hand, the lower Brix value of the fresh tomato had a negative impact on processing efficiency.

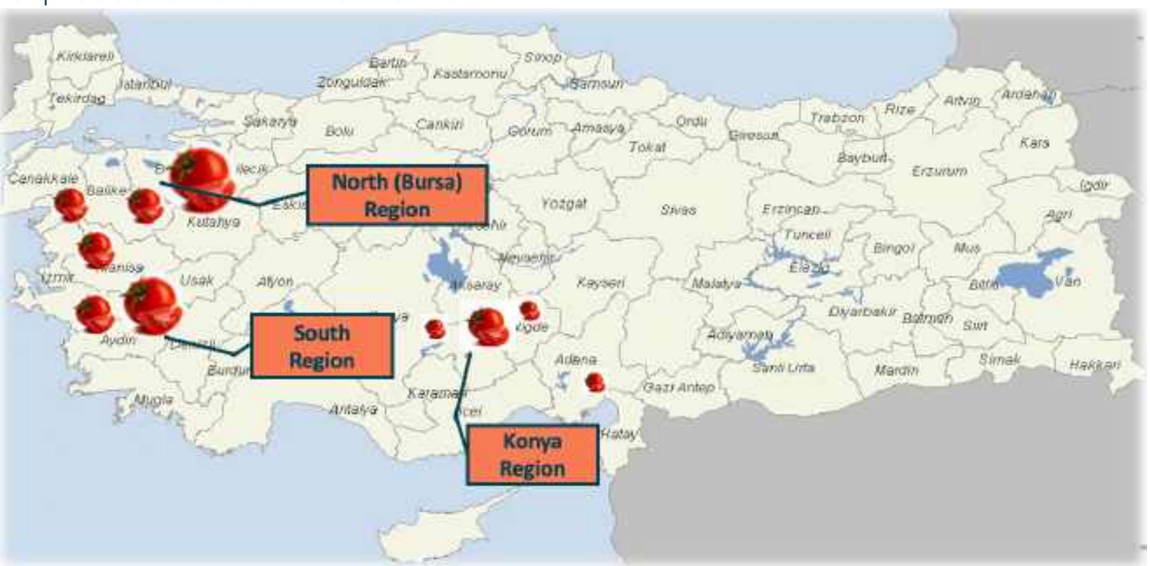
The last two weeks have been quite good for the time of the year with one very good week followed by some rain on27-28 September which was not significant and only slowed operations temporarily. The weather is currently good with temperatures of 27-28 °C with nights at 15-17°C.
As of 28 September, 82% of the forecast of 1.3 million tonnes had been achieved, and there are still significant volumes to be harvested. The harvest is now slowing down and the season should end around 15-16 October. Quality remains good with good colour and brix around 5°.

SPAIN
The season is nearly over in **Andalusia** with only one factory still running.
In **Extremadura** factories in the vegas Altas have all closed and the season should end around 13/14 October in the Begas Bajas where there was a peak in production last week.
In the **North**, the harvest is going well. Factories are still at full capacity and should operate until 20th October.
The overall forecast remains 2.4 million tonnes, down from the first estimate of 2.6 million tonnes.

TUNISIA
The t The season is now finished and the total volume processed in 2025 was 935,000 tonnes in 24 plants. A total of 15,700 ha were planted.

Region	Production
Nabeul	340,000
Nort West	308,000
Central	126,000
Tunis	162,000
Total	**935,000**

TURKEY
Planted surface in Turkey was decreased by 25% compared to last year due to low tomato prices in 2024. Production has ended in south, last days in north region. Konya region will continue another week. Season was stable : decent weather conditions, stable prices , balanced supply-demand , low processing capacity used.
The total production is 2.2 million tonnes.



URAINE
The forecast is reduced to 500,000 tonnes, or maybe less.

OTHER COUNTRIES

BRAZIL
We had a turbulent start to the harvest season regarding ripening, which initially began with good color but lasted for a very short time, with July and August being significantly impacted by green fruit and productivity losses.

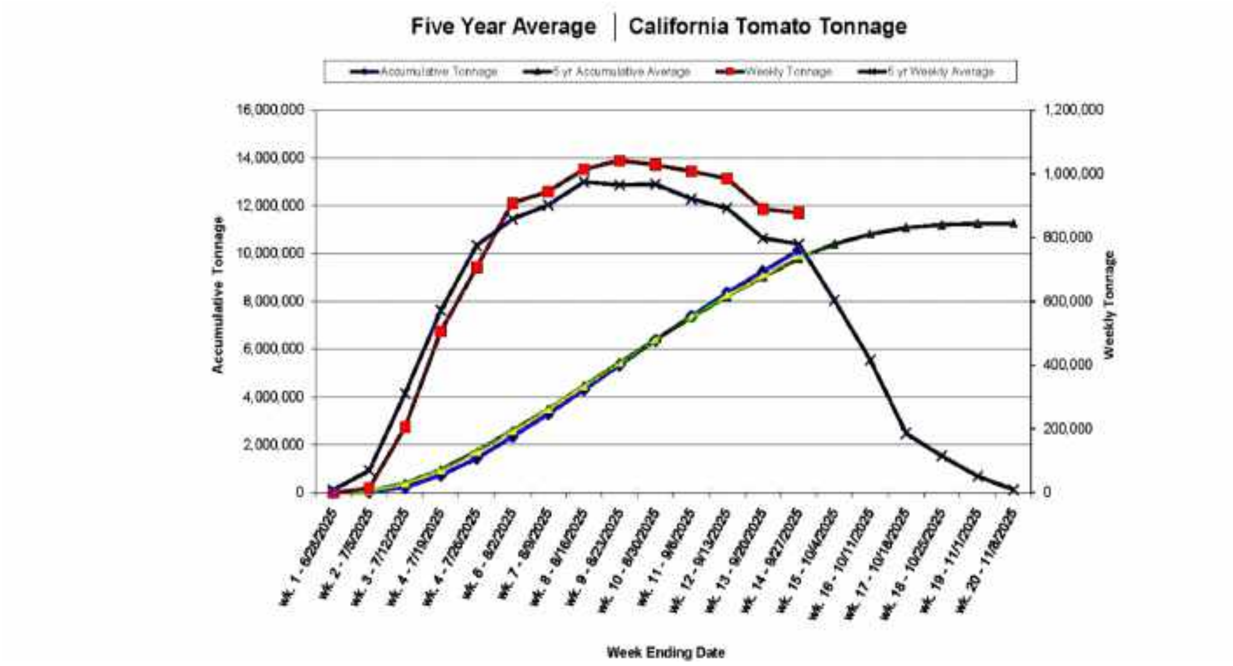
There is a climate consensus that the first semester had no occurrence of intense cold, which favored the ripening of the initial areas. However, starting June 20th, we experienced a significant drop in average temperatures that extended until the end of August, thus bringing substantial ripening delays, consequent harvest delays, and excessive discarding of green fruit in some situations, contributing to even sharper productivity declines. The numbers indicate a 14% reduction compared to the 2024 harvest. A 7% reduction compared to the last estimate made.

	AREA		VOLUME	
	2025	2025	2025	2025.5
TOTALS	18.079	16.145	1.768.900	1.437.000

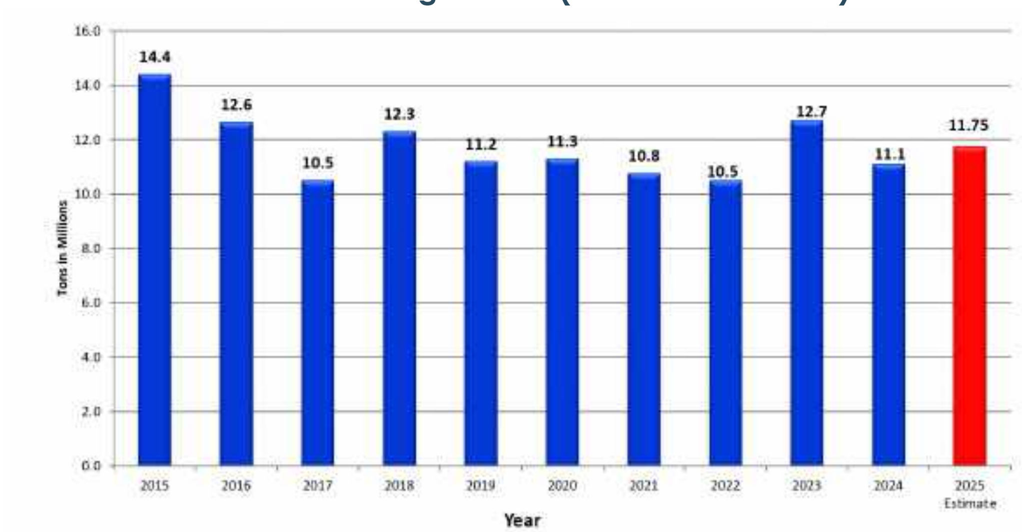
The trend for 2026 is the stability of production volume and area at 2025 levels.

CALIFORNIA
This season has been a record for California. It is a "Unicorn Season" something we have heard could exist, but have never experienced or seen with our own eyes, until this season.
A few key factors (not all):
• The reduction of acreage meant plantings were on the very best soils
• Water availability
• Excellent Weather, during planting, throughout the Spring ,during bloom, crop development, and during harvest.
• The extreme high temperatures that were experienced over the last few seasons didn't happen this year.

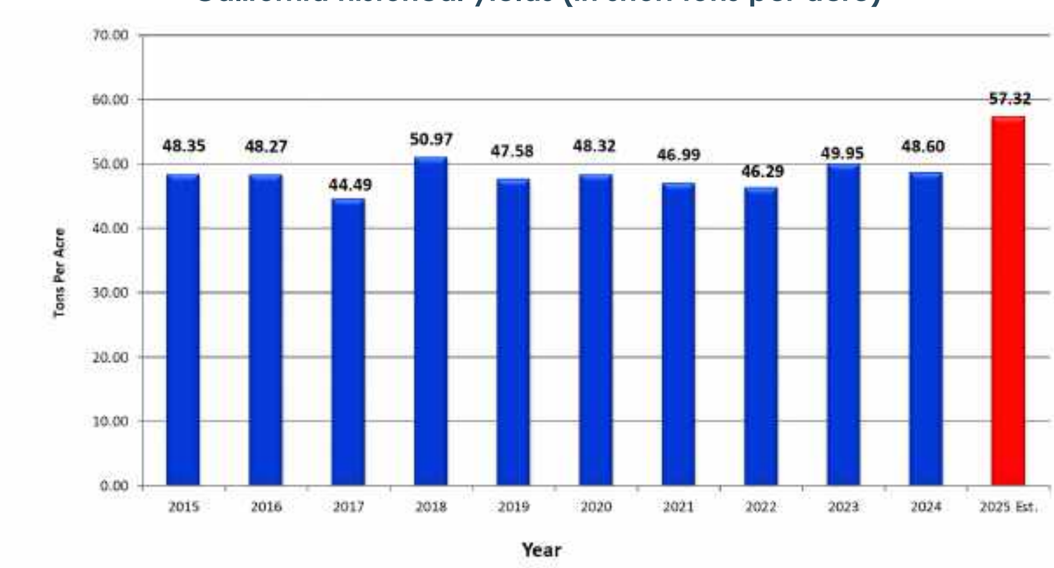
This all translated to very little stress for the crop at any point in the season. This allowed for a 18.75% increase in yield from our historical 5 year average. In consequence, the production estimate has been raised to 11.75 million short tons, 10.65 million metric tonnes.



California tonnage trends (in million short tons)



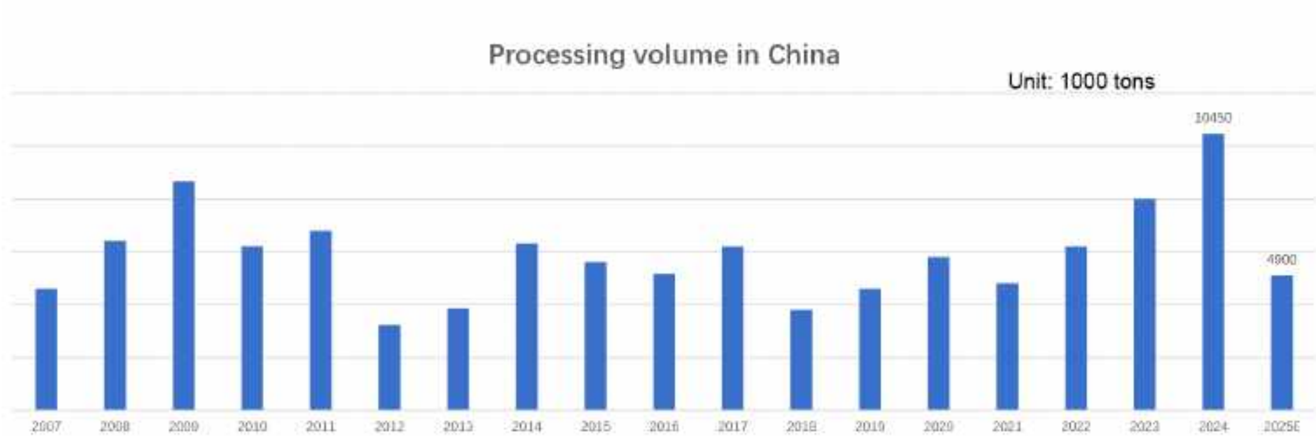
California historical yields (in short tons per acre)



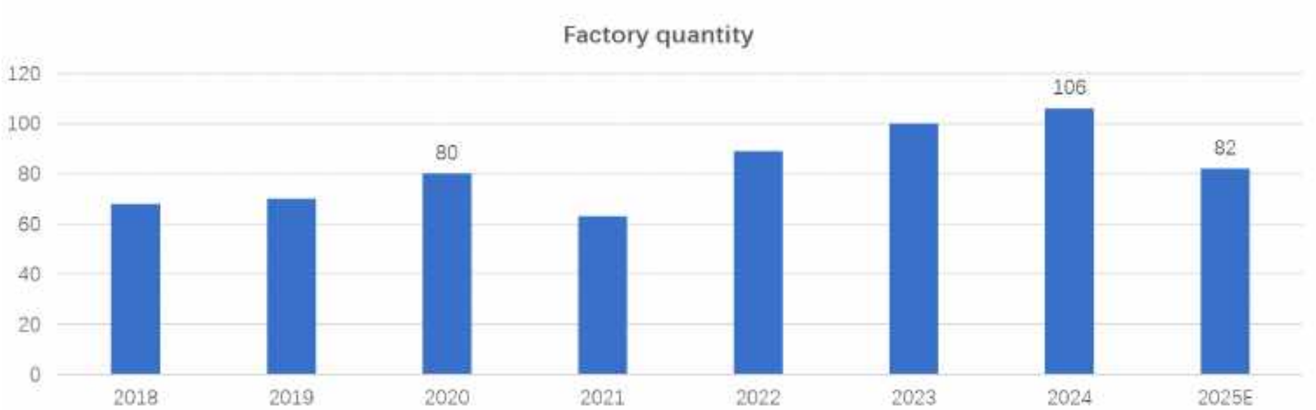
CANADA
The estimate remains 475,000 tonnes.

CHINA
The total volume in China is about 4.9 million tonnes, including 3.02 million tonnes in **Northern Xinjiang**, 1.07 million tonnes in **Southern Xinjiang**, 0.76 million tonnes in **Inner Mongolia**, and 60,000 tonnes in **Gansu-Ningxia**.

In the **Inner Mongolia** region, 20% of the planting area was severely affected by heavy rains and floods from July to August, causing a significant production decline.



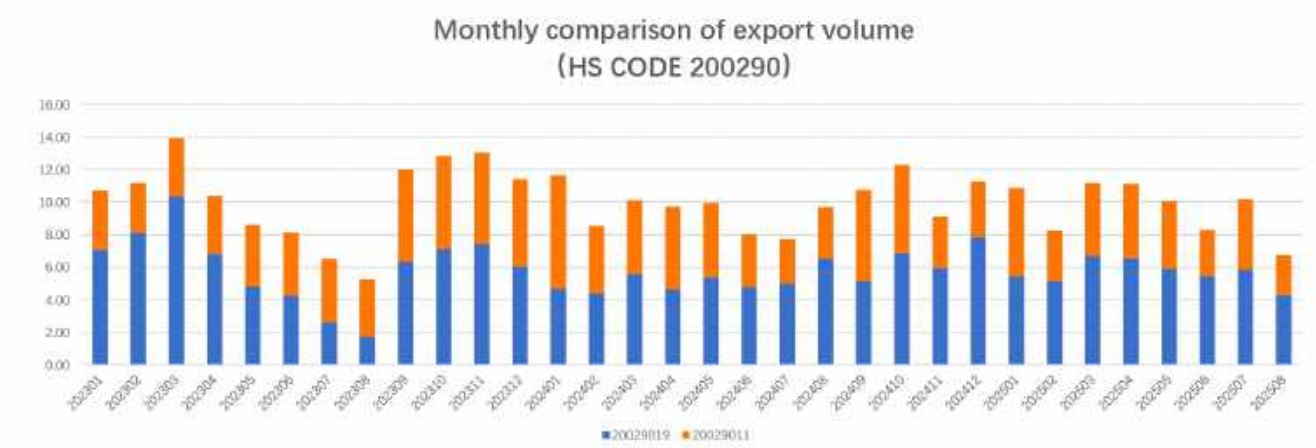
82 factories were running, a decrease of 24 compared to the 2024 crop, equivalent to the 2020 level. The daily capacity is 214,000 tonnes, a decrease of 60,000 tonnes compared to 2024 (-22%).



The 2025 season has been shortened by 22 days compared with 2024, only 50% of full capacity.

Up to on 30th September, the raw material price for China in 2025 is 67 USD/t. This is an increase of 2 USD/t compared to May 2025, but compared to 2024, it dropped by 9 USD/t.

Compared to 2024， the cumulative trade figures over eight months in China were gradually tending to incease. The total export of bulk and repack tomato products (HS CODE 200290) was 0.77 million tonnes, a year-on-year increase of 3% compared to 2024. and the total of bulk was 0.46 million tonnes, a year-on-year increase of 10% compared to 2024.



It is estimated that the volume will reach 6 to 7 million tonnes in 2026, primarily due to:

- Considering the natural growth of the market.
- The reasonable production level for China is between 6-8 million tonnes over the past 20 years.
- The 2025 production fell significantly below the level.

JAPAN
The total volume processed in 2025 is about 25,000 tonnes from 425 hectares. Expectations are for 430 hectares to be planted in 2026 to proces 26,000 tonnes.

CROP 2026

ARGENTINA
The total harvested area for 2025 reached 7,300 hectares, with a production output of 620,250 processed tonnes. Record yields were achieved for early- and mid-season tomatoes, while late-season tomatoes recorded average yields.

For the 2025/26 season, plantations have begun with fewer wind-related issues than usual. Nationwide, a reduced planted area of approximately 6,000 hectares is expected, with a projected production of 550,000 tonnes. Currently, one-third of the planned area has been planted. The milder winter has raised concerns about potential pest pressure on early-season tomatoes, as pests are likely to have survived on overwintering hosts.
The reduction in planted area can be attributed to several factors: stock levels in domestic processing plants, slower market demand, and increased competition from tomato paste imports from Chile and China. These conditions have led growers to scale back on planting for the current season.

AUSTRALIA
The forecast has been reduced to 166,000 tonnes to be processed in 2026 by two processors.

CHILE
About 14.000 hectares should be planted for the 2026 crop, for a crop of approximately 1.3 million tonnes. There is a delay in plan ting due to rains, but it is too early to determine if it will delay the harvest.

PERU
A total volume of 150,000 tonnes is expected for this coming crop. Harvesting is now starting and should continue until February 2026.

SOUTH AFRICA
South Africa ended on 160,000 tonnes for 2025 season, as planned. It was a good season.
The forecast for the 2026 season is not clear, but the first estimate is 130,000 tonnes or even less, a 20% decline on the total volumes for 2026.

wptc

World Processing Tomato Council

World production estimate of tomatoes for processing

Date of last update: 05/10/2025

Hemisphere	Group	Country	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.	40	Mem.	46	-33,3%
		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.	510	Mem.	413	0,0%
		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.	5 700	Mem.	5 384	8,1%
		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.	935	Mem.	832	-6,5%
		Turkey	2 700	Mem.	2 700	Mem.	2 200	Mem.	2 583	-18,5%
		Ukraine**	500	Mem.	550	Mem.	500	Mem.	390	-9,1%
		Subtotal AMITOM	**17 070**		**17 215**		**16 664**		**16 497**	**-3,2%**
		of which members in EU	10 207		10 717		10 229		10 182	-4,6%
	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.	10 650	Mem.	10 356	6,5%
		China	8 000	Mem.	10 450	Mem.	4 900	Mem.	8 217	-53,1%
		Japan	26	Mem.	26	Mem.	25	Mem.	26	-3,8%
		Subtotal Other Members	**21 673**		**22 618**		**17 570**		**20 737**	**-22,3%**
	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 Northen Hemisphere	**41 623**		**42 823**		**37 204**		**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**		**40 288**		**42 879**	**-12,1%**
		of which members of the WPTC	40 899		42 264		36 725		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.

For more information, contact Sophie Colvine, WPTC General Secretary at colvine@tomate.org - www.wptc.to