

WPTC CROP UPDATE AS OF 30 MARCH 2026

AMITOM COUNTRIES

BULGARIA

Due to the rise of energy and fertiliser prices (+40%) and the planned refurbishment of the largest factory Balkan, the volume processed in 2026 should see a 50% reduction to **20,000 tonnes**. The weather is currently a bit wet, but it should not be an issue to start planting towards the end of April as planned.

EGYPT

The forecast remains the same at **800,000 tonnes**.

FRANCE

The forecast is still uncertain as price and volume negotiations are still ongoing but expected to reduce to **150,000 tonnes** probably with a reduction of conventional surfaces, while organics should increase, for a total of less than 2,000 hectares. The weather is not good as there have been a lot of rains throughout the winter and fields are still wet. Transplanting should have started this week but may be delayed to next week as it is currently windy and cold.

GREECE

The weather is nice and fields have been prepared for planting which should start this week in the South and next week in the Centre. The main worry is the effect of the war on energy and fertiliser prices despite some government assistance. The forecast remains **450,000 tonnes**. Prices have been made public and average about 115 euros/tonne delivered, with some variations.

HUNGARY

The current forecast is still circa **70,000 tonnes**. The plantings in the nurseries started last week.

IRAN

There is currently a high level of uncertainty and communication is difficult. Iran has temporarily banned the export of tomatoes and tomato-based products under the current circumstances. More information will be sent when available.

ITALY

The situation in **Northern Italy** is favourable in terms of overall water availability (we had a rainy winter) and also regarding soil preparation. The forecast is maintained at the level issued in February (**3 million tonnes**).

The negotiation of volumes and economic conditions between processors and growers' associations experienced a series of delays and difficulties due to changed energy cost conditions (which affect not only the fuels used for farming operations but also cultivation costs such as technical inputs including nitrogen fertilizers). The negotiations finally closed on

Friday 27 March with an average reference price of **€137/ton ex-field, including premiums for late delivery and for services.**

In **Centre-South Italy**, the situation is better than last year, the water availability is fine in several areas, but while the Occhito dam is in a better situation, it is not enough.

As usual, the processors and growers' associations were waiting for the North to set their price and only after they will start negotiations.

The international situation with the blockade of Hormuz is creating many concerns about the consequences for the costs of diesel and fertilizers, and this will not help negotiations.

The forecast is updated to **2,8 million tonnes**, so the total expectation for Italy is now **5.8 million tonnes.**

PORTUGAL

Portugal was affected by several storms which resulted in floods in all the tomato growing area. The borders of some fields by the river Tagus were damaged which means water flooded land. At the moment we are having good Spring weather which will help for drying some areas still with water. The start of transplant is planned for the 6th of April. Therefore, for the time being we keep the estimation for **1.3 million tonnes.** Prices for the season are about **106-107 euros per tonnes ex field** as reported in the press.

SERBIA

So far, the season has been good, and expectations are for **57,000 tonnes** to be processed if yields of about 90 t/ha are reached like last year.

SPAIN

The winter has been good in terms of rain and reservoirs in Andalusia and Extremadura are full which should ensure a good water supply for the next four years. The weather is now good and planting started last week in **Andalusia** and will next week in **Extremadura.** Prices have been agreed at **about 107 euros/tonne ex field or 115 euros/tonne delivered** but some farmers are now asking for an increase due to the rising costs of energy and fertilisers. The forecast is raised to **2.75 million tonnes.**

TUNISIA

At this stage, we do not yet have any processing forecasts for the current season. The only data currently available relates to the planned area under cultivation, estimated at around 15,300 hectares.

TURKEY

From the information gathered surfaces may be slightly reduced in the **South** and stable or slightly increased in the **Bursa** area. The weather has been wet last week, and more rain is expected next week so planting will be a bit later than usual. There are still stocks of products, mainly canned paste and exports are reduced due to unfavourable exchange rate. The production is expected to be **between 2.4 and 2.5 million tonnes.** There are no public figures on prices, but contracts are currently about **525 TRY delivered, equivalent to 100 euros,** although farmers are requesting increased following rising costs, or they may reduce the fertiliser use, which may impact yields.

UKRAINE

Fields are ready, growing in nurseries started in time, transplanting is scheduled for the end of April. Fertilisers are available, but prices are way from reasonable, and energy prices are also up. The forecast will likely be reduced in May depending on the real situation on the ground. The battle line remains the same as a year ago.

OTHER NORTHERN HEMISPHERE COUNTRIES

BRAZIL

The current forecast is **1.467 million tonnes** from 15,150 hectares.

Projections for surfaces and volumes in Brazil for the 2026 crop

	AREA						VOLUME					
	2023	2024	2025	2026 jan	2026 mar	EV 26x25	2023	2024	2025	2026 jan	2026 mar	EV 26x25
TOTAIS	20.980	18.757	16.145	15.630	15.150	-6%	1.521.000	1.678.290	1.420.000	1.504.550	1.467.453	3%
GOIAS	15.050	13.319	10.660	10.540	10.300	-3%	1.118.000	1.263.000	995.000	1.062.000	1.027.503	3%
SÃO PAULO	3.230	2.738	2.665	2.190	2.320	-13%	195.000	183.800	190.000	181.550	194.300	2%
MINAS GERAIS	2.700	2.700	2.530	2.600	2.330	-8%	208.000	231.490	224.000	241.000	229.650	3%

The conflict in Iran will have likely impacts on the fertilizer market, especially nitrogen fertilizers, according to a Rabobank study (2025). According to the study, approximately 45% of global urea exports transit through routes associated with the Persian Gulf, in addition to 25% of ammonia, 20% DAP, 10% MAP, and almost 30% of global sulfur circulating through these maritime routes. Diesel has already risen 60% in one week in the agricultural market.

CALIFORNIA

Planting for the early part of the crop began in February and the weather provided ideal conditions. As we moved into March, we have seen warmer than normal temperatures which has been very good for plant growth for fields already planted. The warmer temperatures also have resulted in some minor pauses in planting and at this point it shouldn't be an issue. The precipitation received for this year has not been what we had hoped earlier in the winter. This will result in lower water allocations in some areas of the state. Due to the reduction in acres for this season, the lower allocations will not impact acreage for this season.

Price negotiations continue at this point.

CANADA

Preliminary contract intentions for 2026 are 586,000 short tons (**532,000 metric tonnes**). The past few weeks have seen typical early-spring weather, including fluctuating cold-to-mild temperatures, overcast conditions, intermittent rainfall, and occasional wet snow, with several nights falling below freezing. Planting is set to begin in early to mid May.

CHINA

As of the end of March, the planted area of processed tomatoes is about 50,670 hectares. It is estimated that the volume processed will be **5.92 million tonnes**. The downward revision is primarily attributable to farmers' cautious outlook for market and low planting enthusiasm.

JAPAN

Planting will begin in stages from the end of March, starting in **Tokai** region. There is no change to the forecast of 400 hectares to be planted for a volume to be processed of **24,000 tonnes**.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

Argentina's processing tomato crop for the 2026 season is currently at approximately 75% harvested area, with the campaign entering week 13 of harvest. The planted area is estimated at **5,120 hectares**, and under normal yield conditions—aligned with multi-year averages—total production is projected at around **425,000 tonnes**.

Yield expectations remain strong and stable, supported by the high performance observed within the Tomate 2000 program, which has helped offset the impact of recent hail events. Current yields are tracking 10–15% above last season, confirming a sustained improvement compared to 2025. Overall crop condition remains good, and fruit quality has been very satisfactory so far.

Weather conditions have remained broadly consistent throughout the season, characterized by warm, dry, and windy conditions with generally low rainfall. However, in mid-January, a severe hailstorm impacted an unusually large area in **Villa Aberastain (San Juan)**, affecting approximately 400 hectares, with damage ranging from light to very severe.

Harvest activities began in mid-December and have progressed steadily. While some advancement was observed around weeks 5 and 8, operations have since normalized. The campaign is progressing in line with expectations and is projected to conclude by late April, depending on industrial scheduling and remaining field conditions.

Within the Tomate 2000 program, which represents a significant share of the national crop, the current situation shows a slightly more advanced stage, with 76% of the adjusted surface already harvested (2,160 ha out of 2,842 ha). Estimated total production within the program stands at approximately 293,228 tonnes, of which 229,535 tonnes have already been harvested, leaving around 63,700 tonnes still to be collected.

The average yield of harvested fields within the program is currently estimated at 106 t/ha, confirming the strong productive performance observed this season.

The **Tomate 2000 program** continues to increase its share within national production, currently accounting for approximately 68–69% of total estimated output. This growing participation is primarily driven by the excellent performance of its supervised area, where higher and more stable yields have consistently outperformed the national average. As a result, the program is playing an increasingly central role in supporting overall production levels in Argentina.

A clear regional dynamic is observed within the program. In **San Juan**, the crop is significantly more advanced, with 86% of the surface already harvested and only 14% remaining, reflecting its role as an early production zone. Notably, harvested yields have been exceptional, reaching approximately 111 t/ha, confirming the strong performance of the region this season.

In contrast, **Mendoza**, due to its cooler conditions, represents a later production area, with 54% harvested and 46% still pending, concentrating a significant share of the remaining harvest. Despite this later development, harvested yields have also been very strong, averaging around 91 t/ha, highlighting a solid productive performance under more challenging thermal conditions.

AUSTRALIA

Harvest is nearing completion across the nation, but progress has been hampered by widespread rainfall. The combined intake stands at approximately 138,000 tonnes with total production now expected to reach around **157,000 tonnes**. This is a decrease from earlier forecasts. Operations are expected to conclude shortly after Easter.

CHILE

There have been heavy rains in different tomato areas around mid-March, with more than 100 mm over 24h in some places on 16 March. Last week, all factories were working, but with lower volumes. It is too early to assess the full impact the rain may have, and the forecast is kept at **1.3 million tonnes**.

NEW ZEALAND

Tomato volumes have been reduced this year as the only processor remaining (Heinz Watties) has an inventory of paste. The focus this year is on canning and so the plant is only processing **15,000 tonnes**, down from 37,000 tonnes in 2025.

SOUTH AFRICA

South Africa experiences dry heat wave conditions in the summer production areas. Already 75% of the **summer crop** has been delivered, with an average of 5.8 brix, and the summer processing season should end in late April. Currently 25% of the total South African volumes were processed at due date.

In the **Northern** winter production areas of Limpopo, flooding conditions are experienced, and transplanting should end in April. Winter deliveries are scheduled from April to end September.

		2024 FINAL		2025 FINAL		2026 Forecast		AVERAGE 2023-2025	VARIATION 2026 vs 2025	
NORTHERN HEMISPHERE	MEMBERS IN MEDITERRANEAN AREA (AMITOM)	Bulgaria	60	Mem.	40	Mem.	20	Mem.	46	-50,0%
		Egypt	624	Mem.	780	Mem.	800	Mem.	688	2,6%
		France	168	Mem.	186	Mem.	150	Mem.	171	-19,4%
		Greece	510	Mem.	515	Mem.	450	Mem.	472	-12,6%
		Hungary**	120	Mem.	97	Mem.	70	Mem.	109	-27,8%
		Iran**	1 400	Mem.	1 800	Mem.	1 700	Mem.	1 733	-5,6%
		Israel	184	Mem.	191	Mem.	190	Mem.	191	-0,5%
		Italy	5 272	Mem.	5 840	Mem.	5 800	Mem.	5 505	-0,7%
		Malta**	7	Mem.	7	Est.	7	Est.	7	0,0%
		Portugal***	1 500	Mem.	1 305	Mem.	1 300	Est.	1 435	110,7%
		Serbia**	13	Misc.	42	Misc.	57	Mem.	25	35,7%
		Spain***	3 080	Mem.	2 410	Mem.	2 750	Mem.	2 697	14,1%
		Syria**	40	Est.	40	Est.	40	Est.	40	0,0%
		Tunisia	1 000	Mem.	947	Mem.	920	Est.	924	-2,9%
		Turkey	2 700	Mem.	2 200	Mem.	2 450	Mem.	2 533	11,4%
Ukraine**	550	Mem.	470	Mem.	550	Mem.	507	17,0%		
Subtotal AMITOM		17 228		16 870		17 254		17 063	2,3%	
of which members in EU		10 717		10 400		10 547		10 441	1,4%	
NORTHERN HEMISPHERE	OTHER MEMBERS	Brazil	1 650	Mem.	1 437	Mem.	1 467	Mem.	1 553	2,1%
		Canada	493	Mem.	608	Mem.	532	Mem.	540	-12,5%
		California	9 999	Mem.	10 537	Mem.	8 890	Mem.	10 697	-15,6%
		China	10 450	Mem.	4 900	Mem.	5 920	Mem.	7 783	20,8%
		Japan	26	Mem.	22	Mem.	24	Mem.	25	9,1%
		Nigeria	1	Misc.	1	Misc.	1	Mem.	1	0,0%
		Subtotal Other Members	22 619		17 505		16 834		20 599	-3,8%
NORTHERN HEMISPHERE	NON MEMBERS	Algeria*	1 300	Misc.	1 300	Est.	1 300	Est.	1 317	0,0%
		Czech Republic	25	Est.	25	Est.	25	Est.	25	0,0%
		Morocco*	100	Est.	100	Est.	100	Est.	100	0,0%
		Poland	400	Misc.	400	Est.	400	Est.	350	0,0%
		Russia*	670	Misc.	650	Est.	650	Est.	660	0,0%
		Slovakia	20	Est.	20	Est.	20	Est.	20	0,0%
		USA excluding California	475	Misc.	475	Est.	475	Est.	475	0,0%
Subtotal Non Members	2 990		2 970		2 970		2 947	0,0%		
Total Northern Hemisphere		42 837		37 345		37 058		40 609	-0,8%	
SOUTHERN HEMISPHERE	MEMBERS	Argentina	630	Mem.	621	Mem.	428	Mem.	612	-31,1%
		Australia	211	Mem.	211	Mem.	157	Mem.	177	-25,6%
		Chile	1 300	Mem.	1 340	Mem.	1 300	Mem.	1 263	-3,0%
		Peru	150	Mem.	160	Mem.	150	Mem.	153	-6,3%
		South Africa	140	Mem.	160	Mem.	130	Mem.	153	-18,8%
	Subtotal members	2 431		2 492		2 165		2 360	-13,1%	
	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	39	Misc.	37	Misc.	15	Misc.	34	-59,5%
Senegal		73	Est.	73	Est.	80	Misc.	73	9,6%	
Thailand	40	Est.	40	Est.	40	Est.	40	0,0%		
Venezuela	14	Misc.	14	Est.	14	Est.	17	0,0%		
Subtotal non members	595		593		578		593	-2,5%		
Total Southern Hemisphere		3 026		3 085		2 743		2 953	-11,1%	
GENERAL TOTAL		45 863		40 430		39 801		43 561	-1,6%	
of which members of the WPTC		42 278		36 867		36 253		40 022	-1,7%	
WPTC as percentage of total production		92%		91%		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

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