



Statistics

*Morning Star Tomato Paste and
Processed Tomato Statistics*

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THE
MORNING STAR



PACKING COMPANY

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Exhibit 1



2026 California Tomato Paste Processing Capacity

California as a whole produces around 96% of the total U.S. processed tomatoes and represents 1/3rd of the global market.

Processor	Facility Location	Year Built	Tomato Capacity for Tomato Paste (Tons/Hour)	Equivalent Tomato Paste (Pounds/Hour)
Marketers				
Morning Star Packing Company	Williams	1995	1,348	441,859
Liberty Packing Company	Santa Nella	1975/02	966	316,868
Morning Star Packing Company	Los Banos	1990	665	218,017
Los Gatos Tomato Products*	Huron	1991	530	173,861
J.G. Boswell Tomato Company*	Bakersfield	2000	410	134,347
Ingomar Packing Company*	Los Banos	2000	410	134,546
Ingomar Packing Company*	Los Banos	1983	370	121,369
J.G. Boswell Tomato Company*	Corcoran	2008	325	106,716
Toma-Tek	Firebaugh	1989	323	106,006
Pacific Coast Producers*	Woodland	1943/02	295	96,607
Sub-Total	10		5,643	1,850,195
Remanufacturers				
Campbell Soup	Dixon	1975	303	99,303
Hunt Foods	Oakdale	<1970	205	67,221
Campbell Soup	Stockton	1967	200	65,721
Sub-Total	3		708	232,244
Total	13		6,351	2,082,440

*Grower-owned and controlled processor

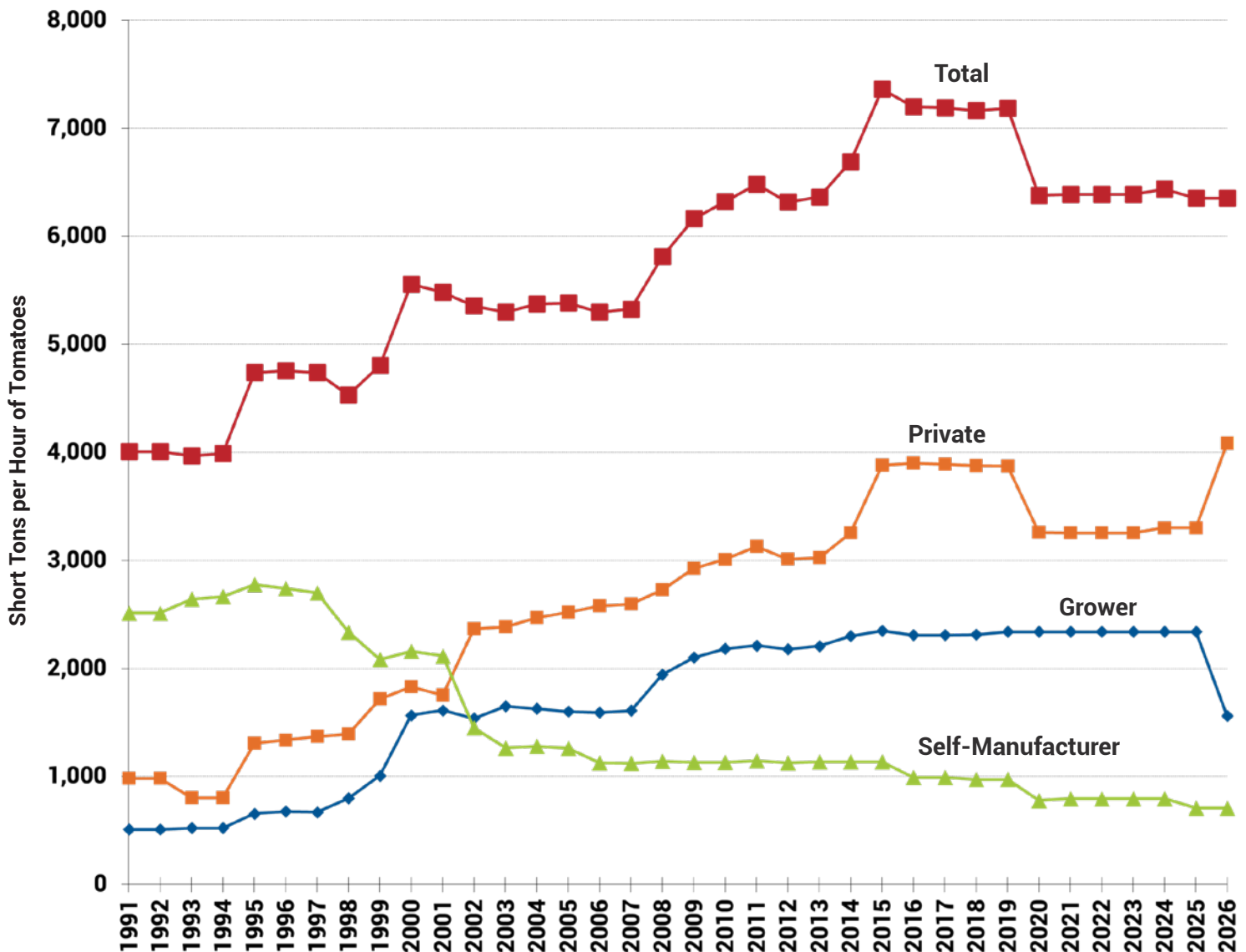
Definitions:

Marketers: Plants making paste for the main purpose of selling it to another party

Remanufacturers: Plants making paste for use internally

Annual Tomato Paste Processing Capacity

(Short Tons/Hour)



Definitions:

Self-Manufacturers: Companies that make paste predominantly for internal uses

Private: Privately held companies that sell paste on the open market

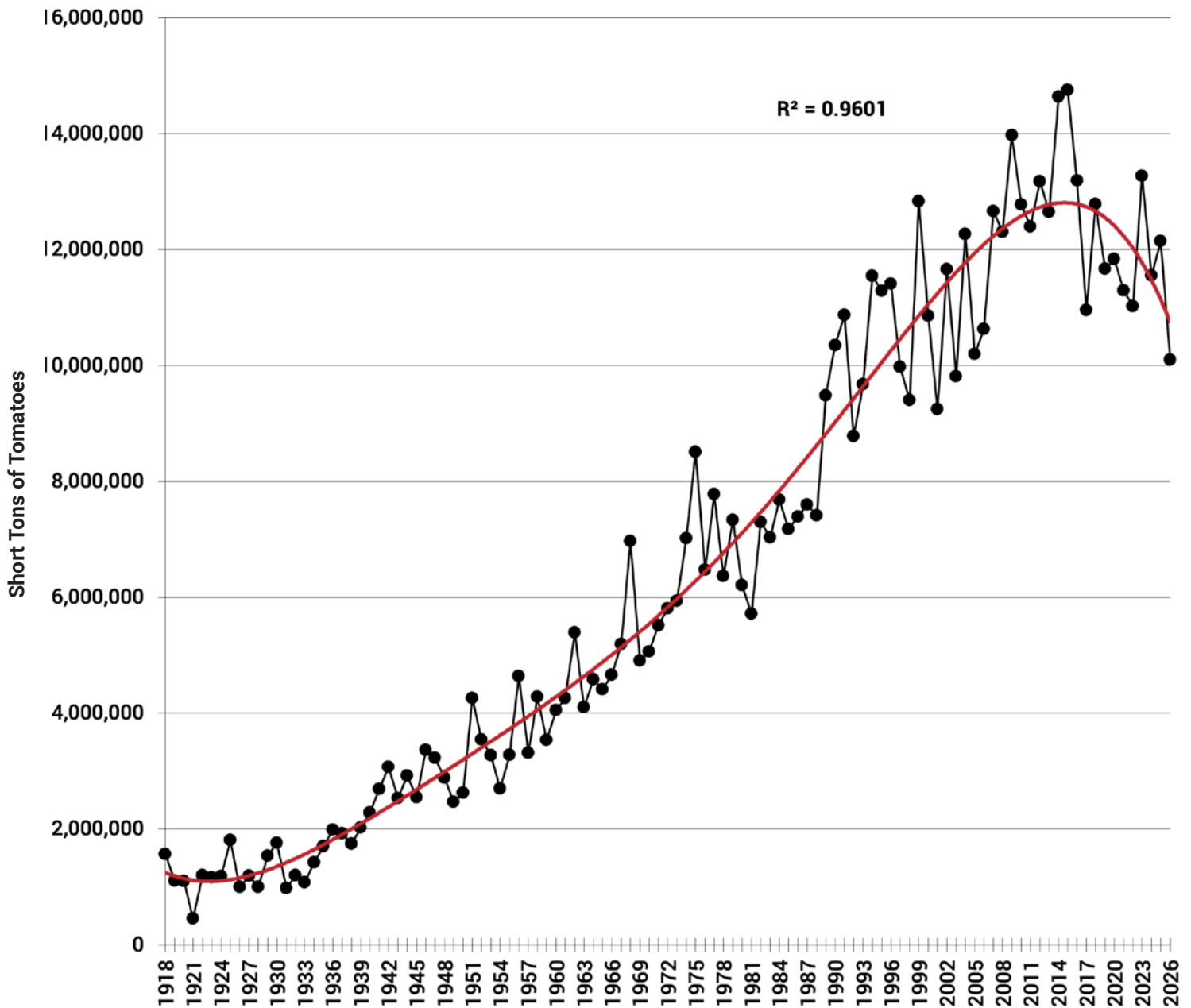
Grower: Grower-owned companies that sell paste on the open market

Exhibit 2

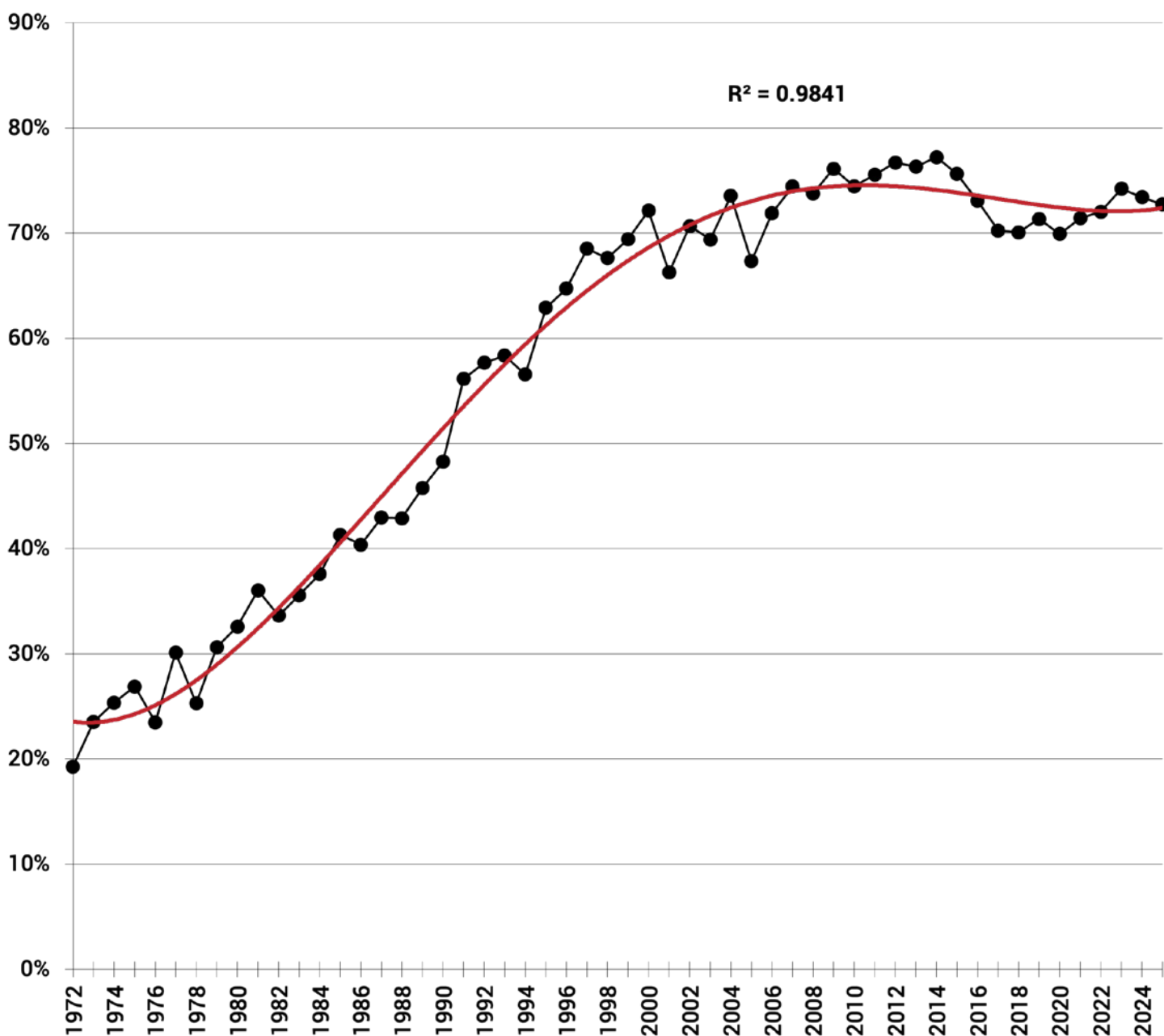


Annual U.S. Processing Tomato Production History

(Crop Projection for 2026)

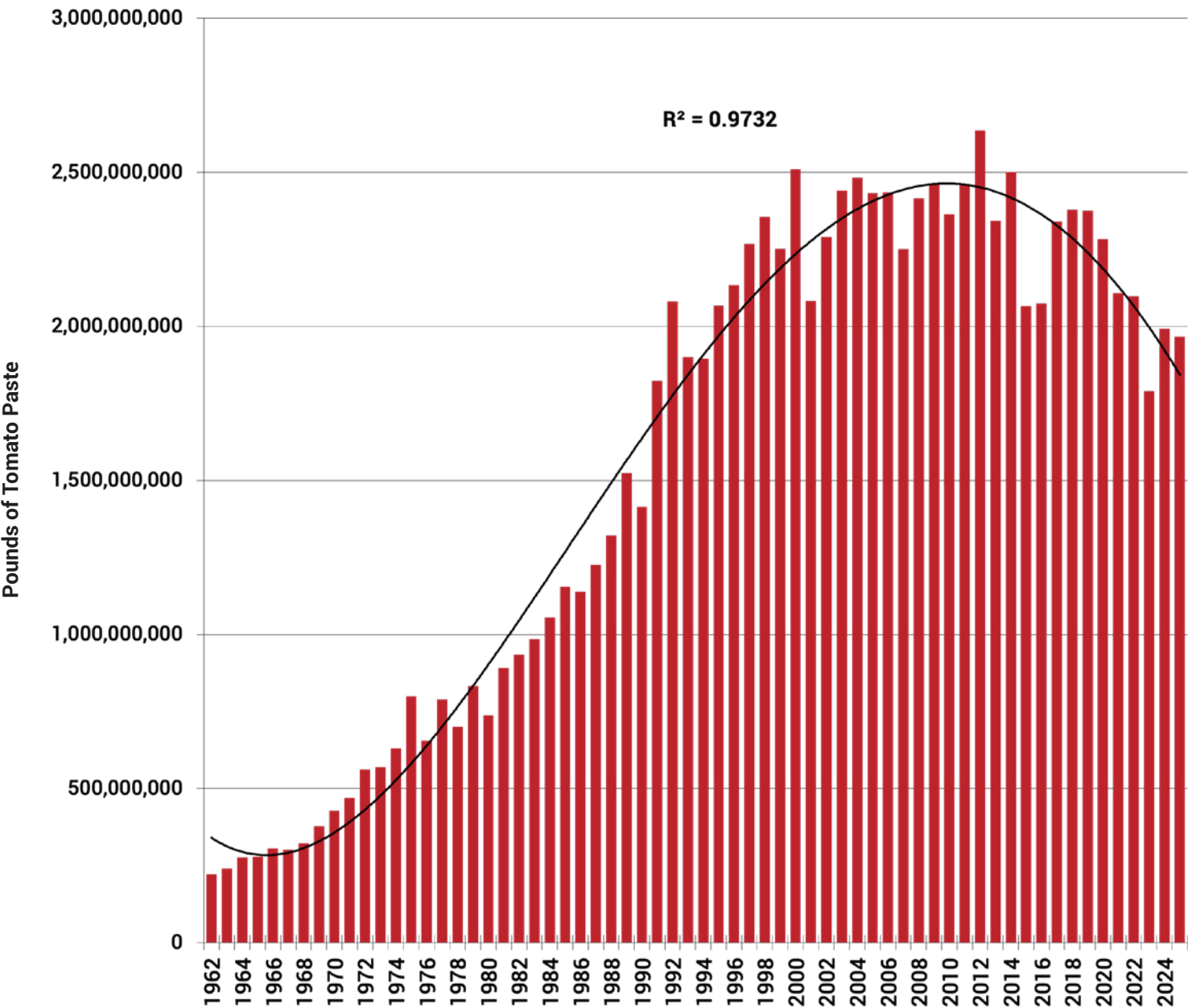


Percent of Total California Processing Tomato Crop Packed as Bulk Tomato Paste





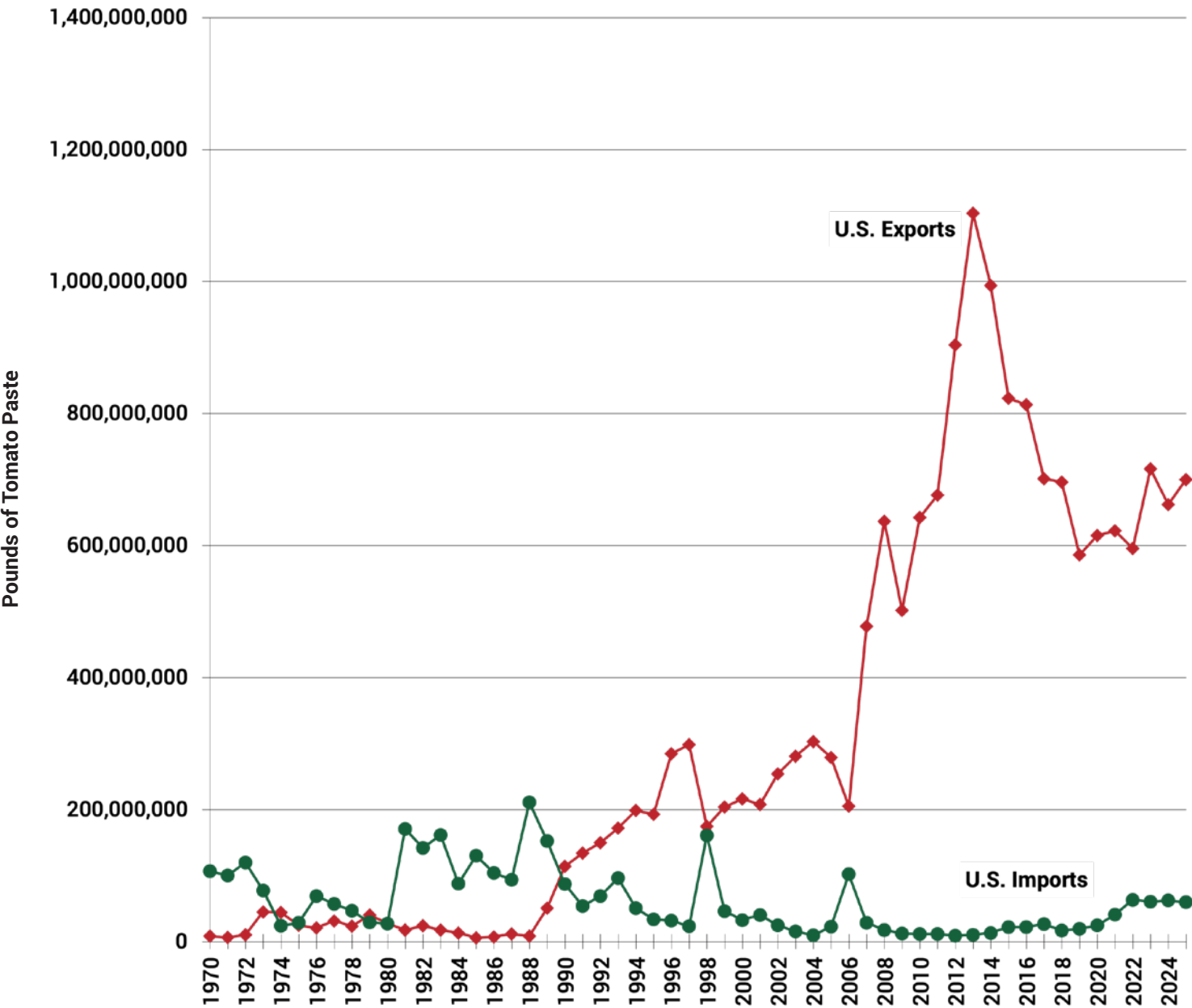
U.S. Tomato Paste Consumption





U.S. Tomato Paste Imports and Exports

(Pounds 31% NTSS)



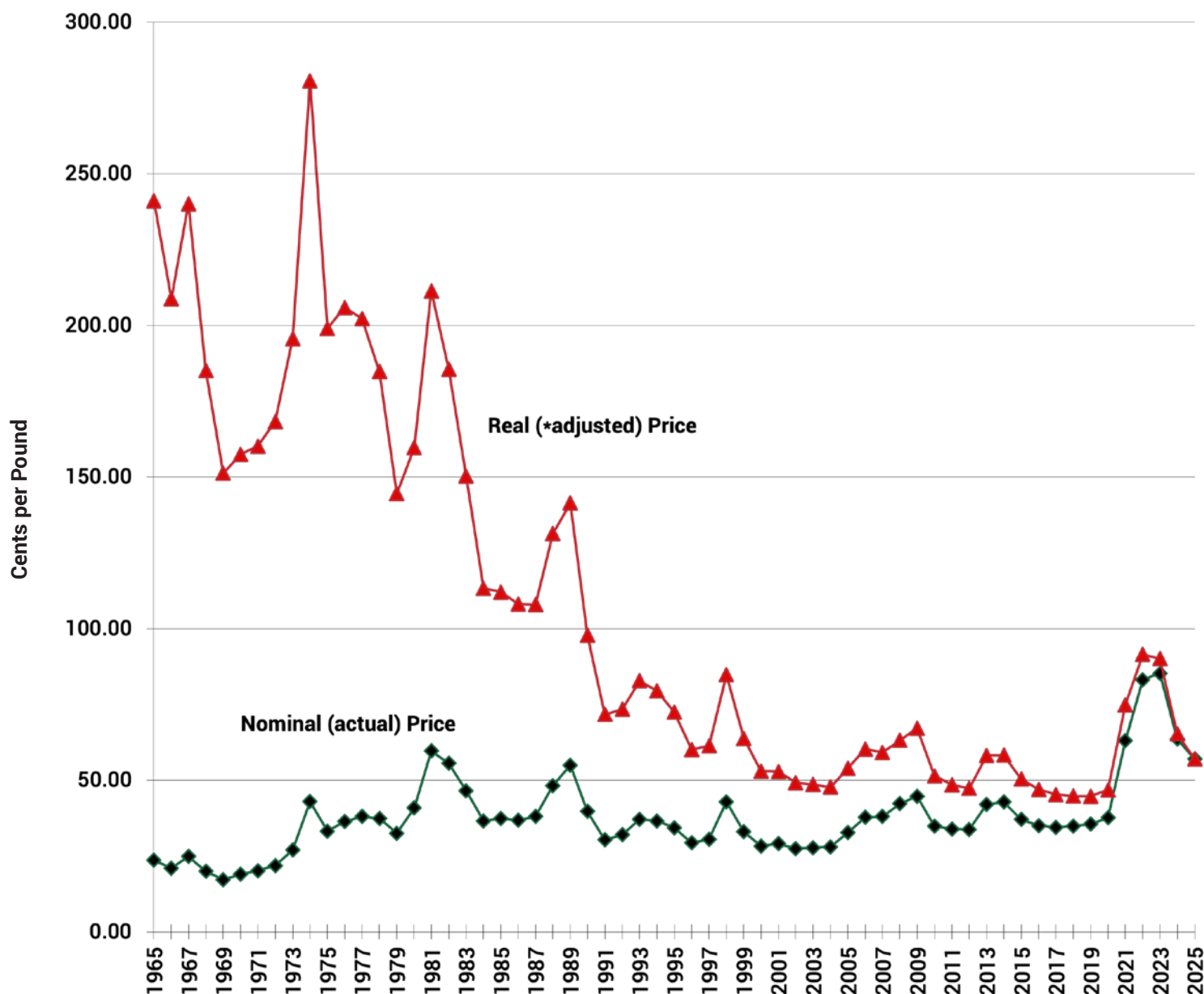


2025 Estimated Industry Average Tomato Paste Production Cost

Fixed Expenses	Percent of Cost
Facility Capital Expenses (Depreciation & ROA)	8.4%
Insurance & Taxes	0.7%
Operating Overhead (Administration and R&M)	11.4%
Variable Expenses	Percent of Cost
Tomatoes with Fees	48.0%
Trucking	7.1%
Seasonal Labor	4.0%
Boiler Energy	5.2%
Electricity	1.5%
Sewage	0.2%
Supplies & Miscellaneous	0.9%
Containers	7.1%
Operating Interest	3.7%
Selling Costs	1.8%
Total Expenses	100.0%
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Annual Historical Price of Tomato Paste

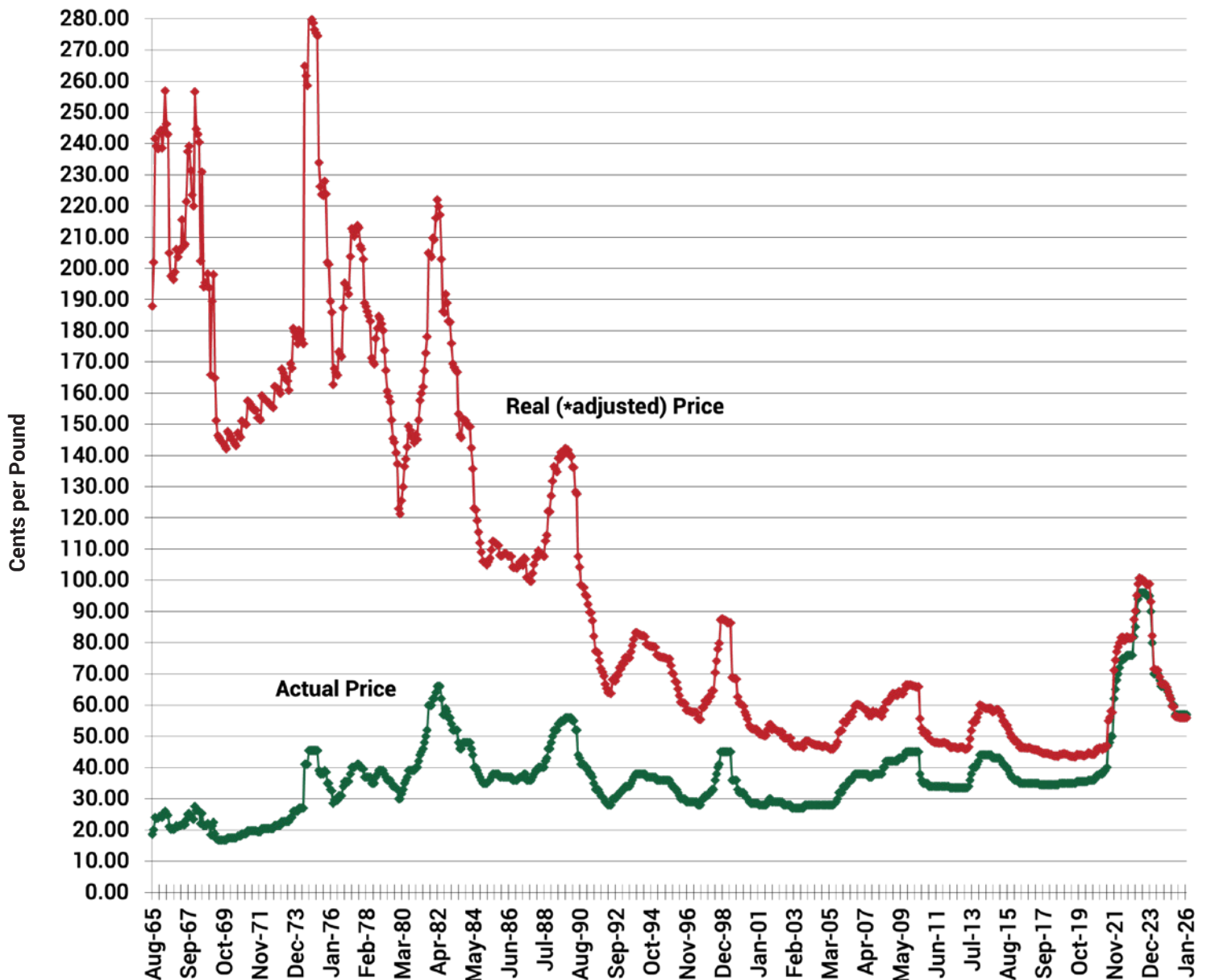
(Cents Per Pound of 31% NTSS)



*Inflation adjusted to March 2025 CPI levels

Monthly Actual and Real Time Prices

(Cents Per Pound of 31% NTSS)



*Adjusted to March 2025 CPI levels

Exhibit 8



(In 2025 Prices)

Tomato Paste Price, Costs, and Processor Margins

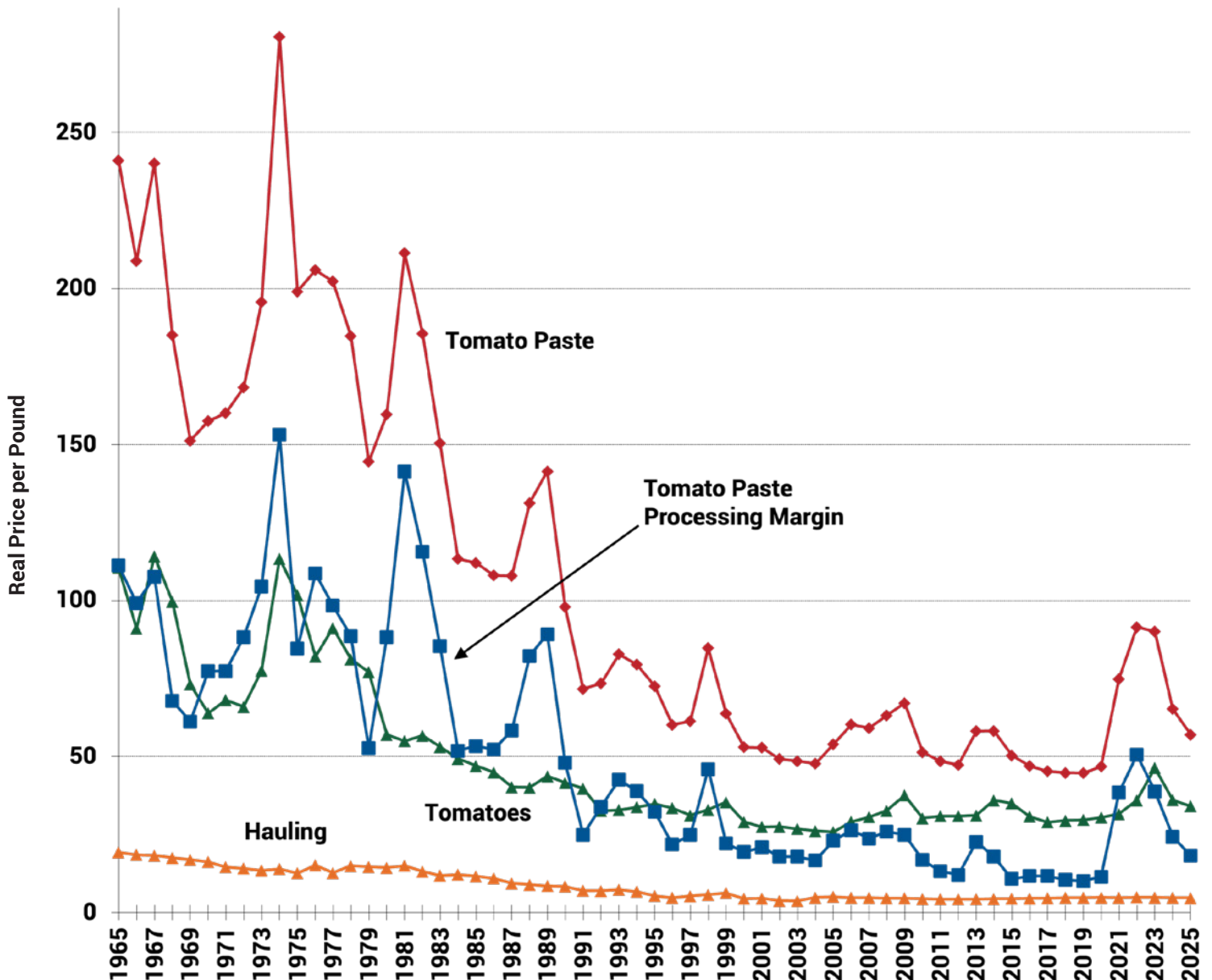
Year	Real Tomato Paste Price (cents/lb)	Real Tomato Cost (cents/lb)	Real Hauling Cost (cents/lb)	Real Tomato Paste Processing Margin (cents/lb)	Real Tomato Paste Processing Margin 7 yr trailing avg.	Years From Low to Low	Grower Percent of Paste Price
1965	241.10	110.52	19.36	111.23			45.8%
1966	208.79	91.06	18.51	99.22			43.6%
1967	240.09	114.17	18.29	107.63			47.6%
1968	185.04	99.66	17.55	67.82			53.9%
1969	151.25	73.08	16.93	61.24		3	48.3%
1970	157.49	63.93	16.24	77.33			40.6%
1971	160.14	68.10	14.59	77.45	85.99		42.5%
1972	168.28	65.93	14.13	88.23	82.70		39.2%
1973	195.61	77.58	13.52	104.51	83.46		39.7%
1974	280.68	113.45	13.98	153.24	89.97		40.4%
1975	199.05	101.76	12.63	84.66	92.38	6	51.1%
1976	205.91	82.02	15.23	108.66	99.15		39.8%
1977	202.25	91.19	12.68	98.39	102.16		45.1%
1978	184.80	81.23	14.95	88.63	103.76		44.0%
1979	144.53	77.09	14.68	52.76	98.69	4	53.3%
1980	159.65	57.02	14.34	88.28	96.37		35.7%
1981	211.39	55.02	15.05	141.31	94.67		26.0%
1982	185.52	56.74	13.16	115.62	99.09		30.6%
1983	150.38	53.09	11.86	85.42	95.77		35.3%
1984	113.34	49.31	12.14	51.89	89.13	5	43.5%
1985	112.07	47.06	11.63	53.38	84.10		42.0%
1986	108.11	44.92	10.96	52.23	84.02		41.5%
1987	107.92	40.20	9.36	58.36	79.75		37.3%
1988	131.31	40.10	8.90	82.30	71.32		30.5%
1989	141.45	43.70	8.50	89.24	67.55		30.9%
1990	97.91	41.57	8.36	47.98	62.20		42.5%
1991	71.69	39.75	7.01	24.94	58.35	7	55.4%
1992	73.43	32.62	6.95	33.86	55.56		44.4%
1993	82.81	32.90	7.36	42.56	54.18		39.7%
1994	79.46	33.80	6.71	38.95	51.41		42.5%
1995	72.52	34.87	5.36	32.29	44.26		48.1%
1996	60.18	33.53	4.80	21.85	34.63	5	55.7%
1997	61.34	31.18	5.30	24.85	31.33		50.8%
1998	84.77	33.00	5.77	46.01	34.34		38.9%
1999	63.77	35.36	6.29	22.12	32.66		55.4%
2000	52.97	29.01	4.49	19.47	29.36		54.8%
2001	52.86	27.45	4.50	20.91	26.79		51.9%
2002	49.21	27.52	3.78	17.92	24.73		55.9%
2003	48.55	26.85	3.74	17.96	24.18		55.3%
2004	47.72	26.16	4.85	16.72	23.01	8	54.8%
2005	53.92	25.85	5.04	23.03	19.73		47.9%
2006	60.28	29.15	4.78	26.35	20.34		48.3%
2007	59.13	30.62	4.75	23.76	20.95		51.8%
2008	63.18	32.69	4.57	25.92	21.67		51.7%
2009	67.15	37.62	4.59	24.95	22.67		56.0%
2010	51.42	30.24	4.36	16.83	22.51		58.8%
2011	48.49	30.94	4.29	13.27	22.01		63.8%
2012	47.33	30.95	4.29	12.09	20.45	8	65.4%
2013	58.15	31.18	4.31	22.66	19.92		53.6%
2014	58.25	36.00	4.37	17.88	19.08		61.8%
2015	50.37	35.05	4.48	10.83	16.93		69.6%
2016	46.95	30.76	4.51	11.68	15.03		65.5%
2017	45.31	28.99	4.62	11.70	14.30		64.0%
2018	44.77	29.48	4.78	10.51	13.91		65.8%
2019	44.70	29.76	4.79	10.15	13.63		66.6%
2020	46.81	30.50	4.81	11.50	12.04	8	65.2%
2021	74.85	31.64	4.72	38.49	14.98		42.3%
2022	91.49	35.99	4.91	50.60	20.66		39.3%
2023	90.07	46.35	4.85	38.88	24.55		51.5%
2024	65.25	36.08	4.80	24.37	26.36		55.3%
2025	57.00	34.09	4.71	18.20	27.46		59.8%
Average value for the years 2021 - 2025 vs. 1965 - 1969:							
	36.9%	37.7%	26.5%	38.1%			

Exhibit 8A



Real Prices to Processors, Growers, Truckers, and Tomato Paste

(Per Pound of Tomato Paste Equivalent)



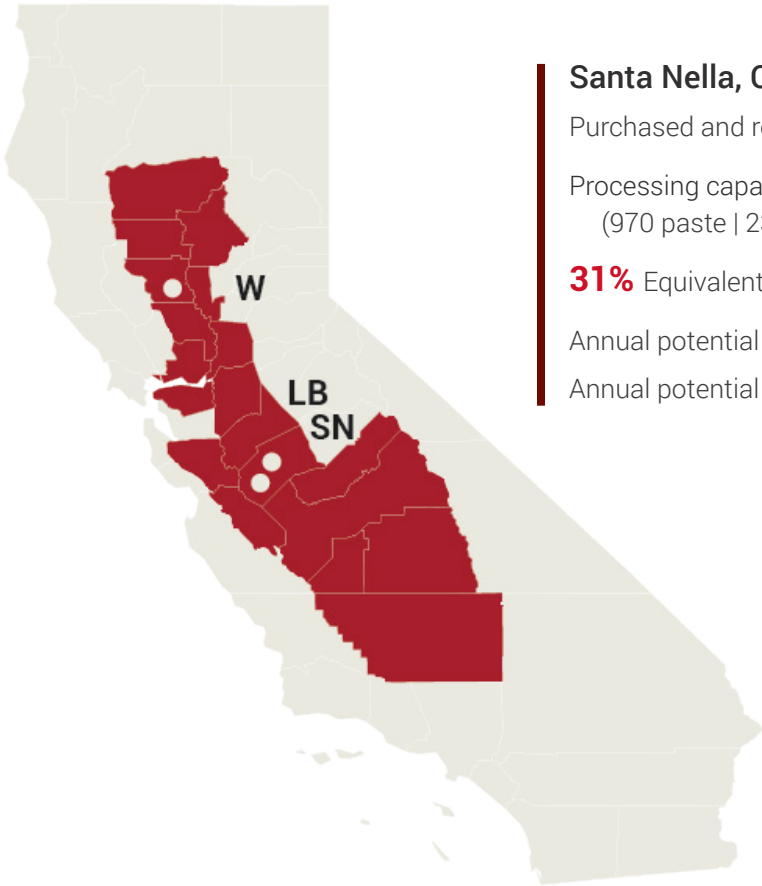


2026 Processing Capacities by Factory and Sourcing Regions

In 1970 Chris Rufer began Morning Star as a one-truck owner-operator, hauling tomatoes from fields to canneries. Since 1970, Morning Star has grown into the largest tomato processor in the world, processing around 30% of California’s processed tomato tonnage. Years of dedication to quality, customer service, and technological innovations have allowed us to become the industry leader in the processed tomato market.

Williams, California
Built in **1995**
Processing capacity: **1,348** tons/hour
31% Equivalent tomato paste **441,859** pounds/hour
Annual potential production of paste approximately **800 mil** pounds.

Los Banos, California
Built in **1990**
Processing capacity: **665** tons/hour
31% Equivalent tomato paste **218,017** pounds/hour
Annual potential production of paste approximately **450 mil** pounds.



Santa Nella, California *(Liberty Packing Co.)*
Purchased and rebuilt in **2002**
Processing capacity: **1,319** tons/hour
(970 paste | 232 diced | 117 other)
31% Equivalent tomato paste **328,257** pounds/hour
Annual potential production of paste approximately **755 mil** pounds.
Annual potential production of diced approximately **540 mil** pounds.

■ Morning Star tomato sourcing regions.



PASTE

Products you can rely on.

In addition to traditional ingredient products, we also offer additional organic products, green tomato products, crushed tomatillos, chile purees, custom formulated tomato products, tomato concentrates, ground pomace, foodservice and retail pouched and canned tomatoes, and several additional R&D products.

Products

Hot Break Paste (26% - 31% NTSS)

Cold Break Paste (29% - 37% NTSS)

Concentrated Crushed (26% - 31% NTSS)

Ground in Puree

Puree (1.07)

Diced (3/8" to 1" cut)

Random Kitchen Cut in Puree

Fire Roasted Diced (1/2" or 3/4" cut)

Sun-Dried Tomatoes

Organic Products

Organic Hot Break Paste (31% NTSS)

Organic Cold Break Paste (31% NTSS)

Organic Concentrated Crushed (26% - 28% NTSS)

Organic Diced (1/2" and 3/4" cut)



300-gallon aseptic
bag-in-box



55-gallon aseptic fiber,
plastic, and steel drum



30lb bag-in-box (sun-dried)
25lb bag-in-box (sun-dried)

Dedicated organic line for all season processing.

Morning Star offers a fully dedicated organic processing line at our Liberty Packing facility. By dedicating an entire processing line to organics, with a paste and diced production capacity of 320 tons/hour, we can consistently deliver high quality organic tomato products all season long. This consistency comes from sourcing our organic tomatoes throughout the season, instead of at the beginning when they may not be at peak quality.

Ask your sales colleague about our extensive line of innovative value-added products.



PASTE



CONC. CRUSHED



GROUND IN PUREE



PUREE



DICED IN JUICE



FIRE ROASTED SALSA



GREEN DICED



GREEN CRUSHED



FIRE ROASTED
GREEN CRUSHED



RED CHILE PUREE
(GREEN CHILE OPTION)



TOMATILLOS
CRUSHED



FILTERED TOMATO
CONCENTRATE
(AGED OPTION)



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