WPTC CROP UPDATE AS OF 28 OCTOBER 2026

AMITOM COUNTRIES

BULGARIA

The harvesting finished on 5th October. Yields where about 10% lower this year at about 70 t/ha due to intense heatwaves during June and July. Brix levels were approximately 4.5–4.7, lower than usual.

Sustained high temperatures, particularly overnight, prevented tomato plants from recovering physiological function during crucial phases of development. This heat caused widespread pollination failure and resulted in undersized, seedless (parthenocarpic) fruit. Late-season crops suffered the most severe damage as key growing phases coincided directly with peak temperatures.

Total production was approximately **20,000 tonnes**, processed by only two companies, as one being refurbished did not process in 2026.

EGYPT

The processing is now ongoing from Nili crop (early winter) and shall last till December. The forecast for 2026 remains as declared last time at **752,000 tonnes**.

The winter crop will then start from January till April.

FRANCE

Final production slightly exceeds at total of **137,000 tonnes**, 94% of the potential of 145,000 tonnes. The early season was good but yields were low at the end due to heat waves from late May to late August and thermal stress, with approximately 60–65 t/ha.

GREECE

The final production is **440,000 tonnes**. The volume is slightly less than last year, but this was largely planned as 2024 overproduction created large stocks.

Average yield was over 95 t/ha, with an average brix over 5 and good quality.

HUNGARY

The 2026 tomato processing season has completed in Hungary by the end of September, with a total of approximately **65,000 tonnes** of tomatoes processed nationwide.

Throughout the season, fruit quality was generally very good, with favourable soluble solids levels averaging around 5.4 °Brix. Despite the somewhat smaller planted area compared with previous years, yields were above average, and the consistently high soluble solids content contributed positively to the production of high-quality tomato products.

The season was characterised by challenging weather conditions, including recurring heatwaves, unusually cool nights during certain periods and very limited rainfall over the past three months. These conditions slowed ripening during the early stages of the season, but harvesting and processing subsequently progressed steadily, allowing the campaign to be completed successfully.

IRAN

Based on the most recent information received from our industry contacts, the majority of tomato processing factories in Iran have now completed their operations for the 2026 season. We estimate that approximately **90% of the anticipated national processing volume has already been processed**, with the remaining 10% expected to be completed over the coming weeks.

Our current estimate for the **total volume of tomatoes processed in Iran during the 2026 season is approximately 1.7–1.8 million metric tonnes**, broadly in line with our earlier forecast.

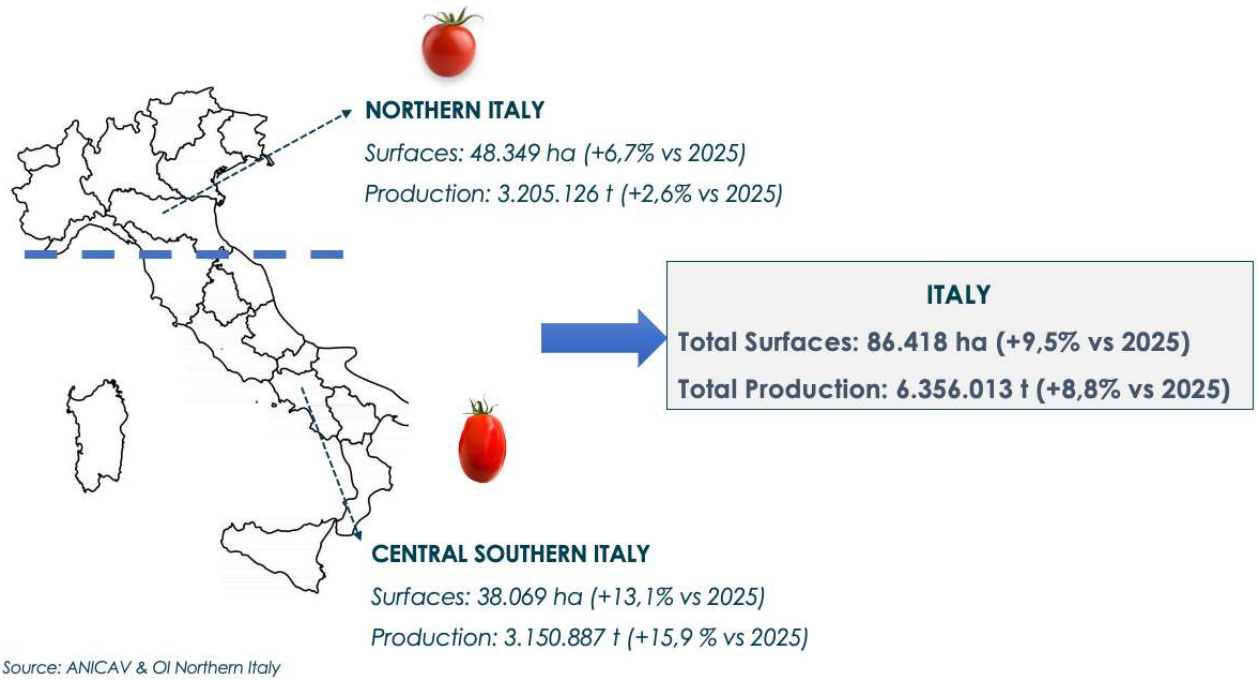
The season has faced several challenges, including high temperatures, water shortages and difficult economic conditions. However, processing activity has remained relatively strong, partly due to reduced domestic purchasing power, which has encouraged a greater proportion of tomatoes to be directed towards industrial processing rather than the fresh market.

Although the final national figures are not yet available, with most processing activities now completed, we believe the estimated range of 1.7–1.8 million tonnes provides a reasonable indication of the expected final outcome.

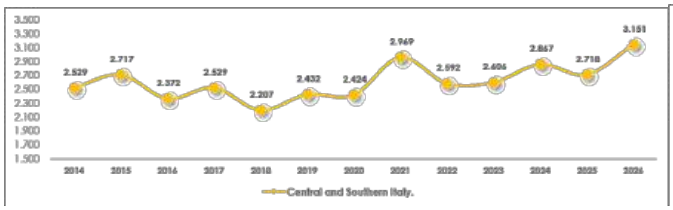
We will continue to monitor the situation and share any significant updates as further information becomes available.

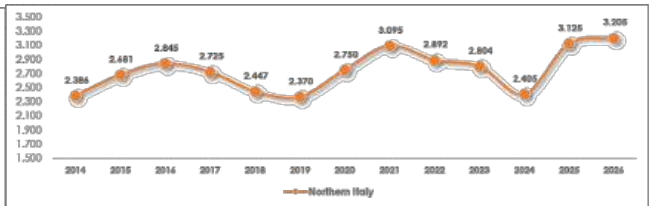
ITALY

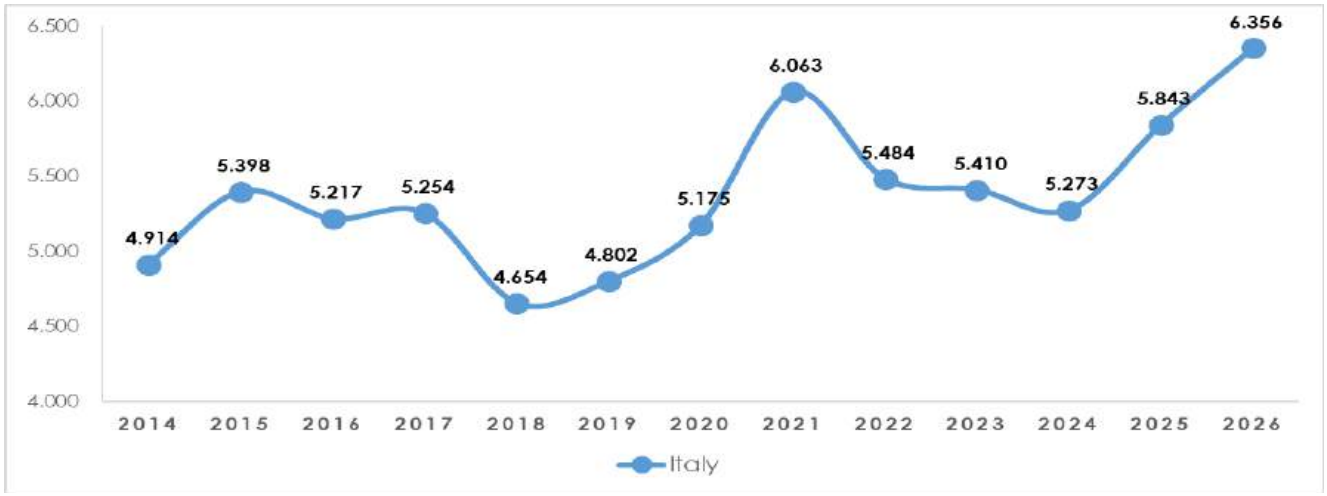
The 2026 season ended with a record production of **6.356 million tonnes,** up from earlier season estimates close to last year production of 5.843 million tonnes.



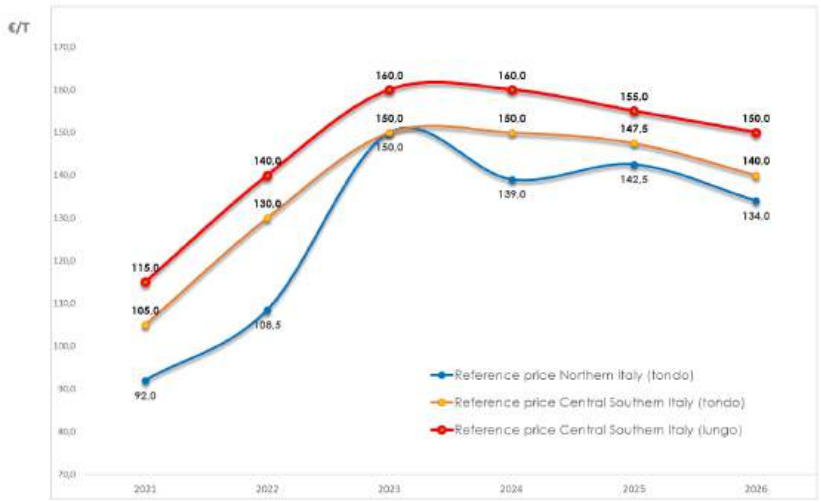
Source: ANICAV & OI Northern Italy





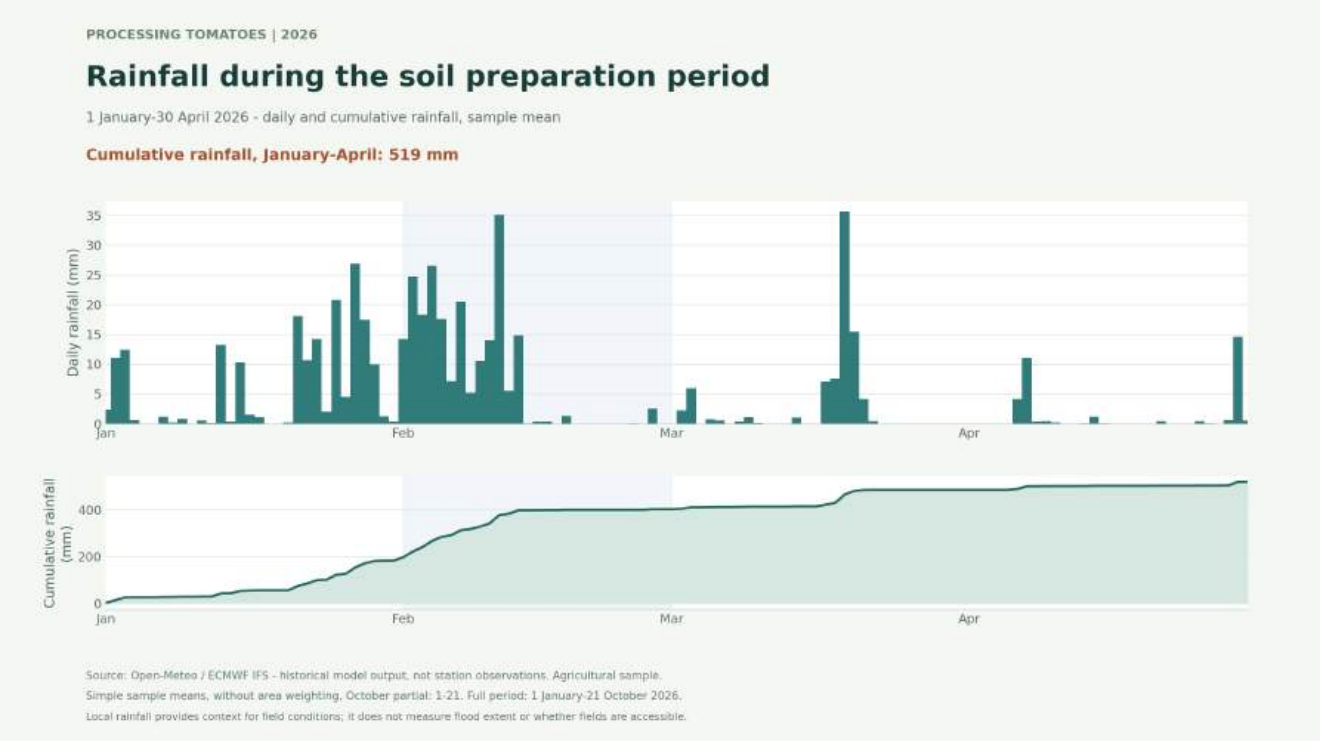


Northern Italy yields were approximately 66 t/ha, well below average, due to three hailstorm events in Mantova, Cremona, Modena, and Ferrara, while in Southern Italy yields were over 85 t/ha. Tomato prices in Italy were the highest in the world this year; expected to decrease next year as stocks increase. Farmers in the south were happy with this season's results while those in the north, less so.

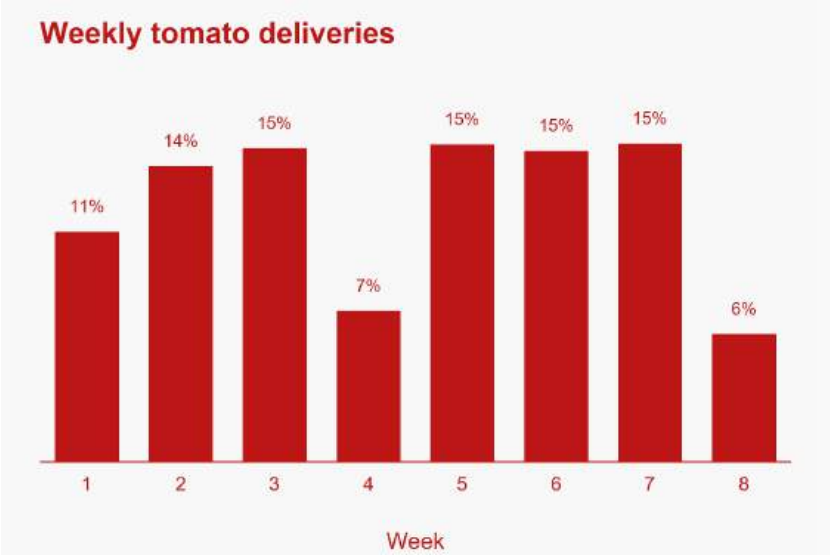


PORTUGAL

Between December 2025 and February 2026, mainland Portugal recorded 634.5 mm of rainfall, equivalent to 217% of the normal total. It was the 7th wettest winter since 1931 and the second wettest since 2000. The persistent rain saturated the soil and caused river levels to rise, hampering field preparations for the industrial tomato season and delaying planting which started in early April and ended in the second week of June. Despite these challenges, the planned planting was completed in full. During the whole season, unusual wet spells and heat made crop management more demanding, while a narrower range of treatments left growers less flexibility in responding to disease pressure and managing resistance.



The season ran from week 32 (3–9 August) to week 39 (21–27 September). This period, lasting around eight weeks, serves as the timeframe for evaluating the progress of the harvest, supplies to industrial plants and weather conditions during the season.



Although late-season yield losses were reported, the average yield is reported to be around 96-98 tonnes per hectare.
National production ended at **1.385 million tonnes**, close to the 1.432 million tonnes contracted for the 2026 season, with the usual quality known in the tomato cultivated in Portugal of good color and sweet-acid ratio in balance.
Rising fuel and fertiliser prices added financial pressure during the 2026 season. Disruption to international energy and fertiliser markets increased costs and purchasing uncertainty, putting growers' margins under further pressure alongside the operational difficulties caused by the weather.

SERBIA

Total production reached approximately **55,000 tonnes**, which is 4–5% below prediction. Average yield was 72 t/ha, compared to 82 t/ha last year, a 10% decline year-on-year. Brix for Polimark (representing approximately 75% of total Serbian volume) was 5.7, described as "rather good."

SPAIN

2026 tomato for processing campaign in Spain has been complex, specially in Andalucía and Extremadura. It has been an early campaign, that started in Andalucía on the 10th of July and ended in the Ebro valley on the 20th of October.

Successive heat waves affected middle and late crop causing flower abortion. The high temperatures favoured mite infestations, while the ban on spirotetramat prevented effective control of the attacks

Early tomato was good in quality and quantity in Extremadura; good in quality and less quantity in Andalucia. Late tomato had lower quality (colour and brix) and lower quantity in Extremadura. Late tomato in Andalucia had better quantity and lower quality (colour and brix).

Andalucia production was approximately 12% below forecast and Extremadura approximately 8% below forecast. Ebro valley and other producing regions were less affected. Final production is evaluated at **2.565 million tonnes**.

	Surface (ha)			production (MT)			Yield (MT/ha)		
	2025	**2026**	**26 vs 25**	**2025**	**2026**	**26 vs 25**	**2025**	**2026**	**26 vs 25**
Extremadura	20.200	21.068	4%	1.685.000	1.800.000	7%	83	85	2%
Andalucía	5.275	5.457	3%	420.000	475.000	13%	80	87	9%
Ebro valley	2.900	2.500	-14%	215.000	200.000	-7%	74	80	8%
Other regions	1.035	1.035	0%	95.000	90.000	-5%	92	87	-5%
TOTAL SPAIN	**29.410**	**30.060**	**2%**	**2.415.000**	**2.565.000**	**6%**	**82**	**85**	**4%**

TUNISIA

The crop ended with **840,000 tonnes** processed. The 2026 campaign faced significant environmental and operational headwinds. Early-season rains during transplanting were immediately followed by extreme heat waves and severe irrigation shortages in July, while field pressures from pests and diseases took their toll. Compounding these agronomic pressures were frequent electrical outages and logistical bottlenecks—including lengthy transport delays and extended waiting times at both farmgate and factory receiving points.

TURKIYE

Final production estimated at **2.2 million tonnes,** similar to last year. Three growing regions came into harvest simultaneously, creating a compressed, pressurized peak period. Approximately 40% of harvest still on spot pricing, putting pressure on raw material prices. Farmers are not satisfied with overall results and the export markets remain weak.

UKRAINE

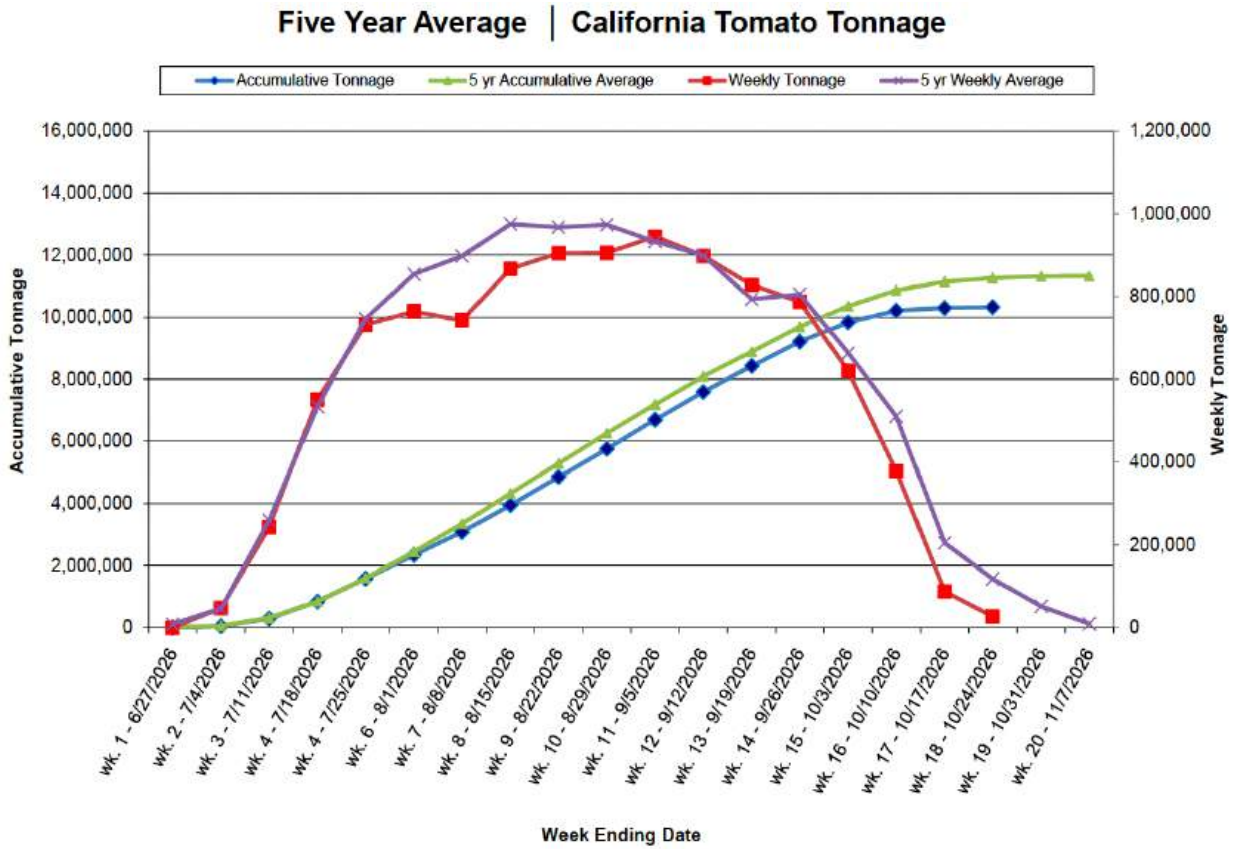
Total production was expected to reach approximately **500,000 tonnes**.

Tomato quality was acceptable for most of the season but has declined slightly toward the end. Factory utilisation has been satisfactory.

OTHER NORTHERN HEMISPHERE COUNTRIES

CALIFORNIA

The season was good and production ended at **9,364,660 metric tonnes** (10,322,771 short tons). The 2026 figure is 8.6% less than last year and 11.13% less than the average of the last 5 years. The harvest started in late June with a strong front end and a stable middle and tail end. The average yield was just under 56 short tons per acre (c. 126 t/ha) on 185,000 acres (c. 75,000 hectares), down from 205,000 acres in 2025, approximately 10% reduction). The five-year average is now nearly 51 tons/hectare (c. 114 t/ha), up from high 47–48 (105-107 t/h) previously. Brix was similar to last year at 5.13 on average.

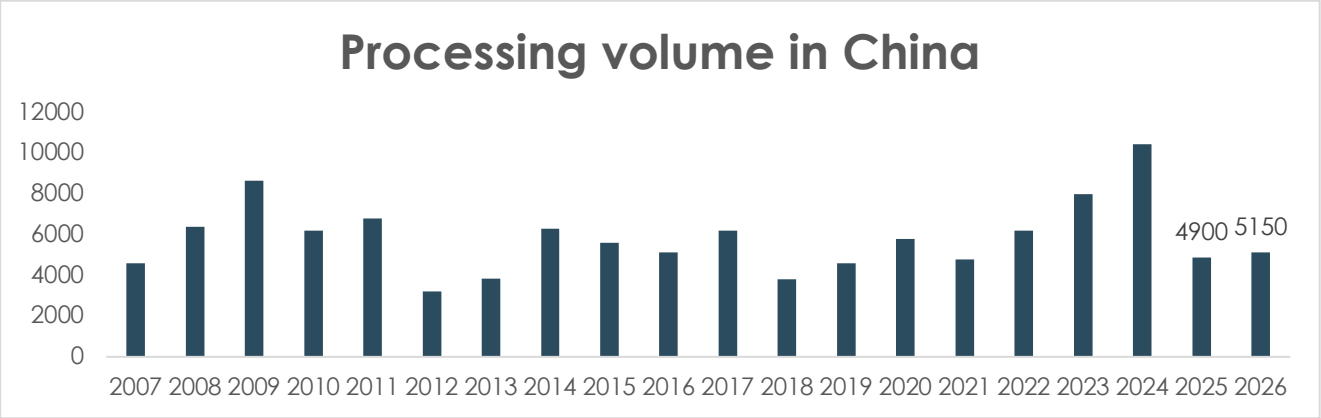


CANADA

The harvest is now complete, with overall crop quality being good. While final volumes have not yet been officially reported, they should be close to the contracted level of **518,500 tonnes** (571,560 short tons).

CHINA

The total volume in China is about **5.15 million tonnes**, a increase of 0.25 million tonnes from the 4.9 million tonnes processed in 2025, but approximately 700,000 tonnes below the early forecast.



The total volume was lower than the earlier forecast of 5.85 million tonnes for several main resaons. First, hail and sandstorms in parts of Xinjiang and Inner Mongolia impacted early stage after transplantation. Second, El Niño heatwave and water shortage during key growth phases (June–July). Third, heavy rainfall and hailstorm during the harvest in Inner Mongolia.
A total of 87 factories were running, 5 more compared to 2025, and equivalent to the 2022 level. The daily capacity was 225,000 tonnes, a increase of 20,000 tonnes compared to 2025, up by 10, but most factories ran below full capacity.
The bulk paste export market is down 6% over 12 years while the repack is up 20%, with prices rising in the last four months.
The preliminary 2027 forecast is for 5.5 to 5.8 million tonnes to be processed but there are concerns that El Niño is expected to be even stronger. The reasonable production level for China has been about 6 million tonnes over the past 20 years, and considering the fall in stocks and reasonable consumption increase, the forecast is considered reasonable.

JAPAN
The provisional volume of tomatoes processed was **22,000 tonnes** from 400 hectares.
Nationwide, crops generally grew well following transplantation. Through the first half of July, there was no repeat of the extreme heat or drought experienced the previous year, and harvesting proceeded smoothly. However, from the latter half of July onward, factors such as heavy rainfall and a lack of sunlight caused total production to fall short of the planned output. Notably, the yield per unit area was slightly higher than in the previous year.

NIGERIA
The harvest lasted five weeks in Februry-March.
The factory received and processed approximately **1,642.75 metric tonnes of fresh tomatoes**, producing 267.7 metric tonnes of tomato concentrate at 27°Brix. The raw material recorded an average starting Brix of 4.4, with a favorable color value of 1.8.
Approximately 29.25 hectares were planted with high-quality hybrid tomato varieties, producing 1,813.65 metric tonnes at an average yield of 60.5 t/ha. This represents a 51% increase over the projected yield target.

SOUTHERN HEMISPHERE COUNTRIES

ARGENTINA

The estimate is for only around 4.500 hectares to be planted which could produce about **390.000 tonnes** (down from 5,120 hectares and 431,000 tonnes in 2026).
Transplanting started during the first week of September (week 36), with hopes of starting the harvest before Christmas, as has been successful in the past few years. There were isolated frosts in in the earliest transplant areas in San Juan, so delays in planting schedule.
El Niño is a concern.

AUSTRALIA

The forecast for the 2026/27 season is to plant 1,155 hectares for an expected production of a **141,000 to 142,000 tonnes,** down from 161,000 tonnes from 1,475 hectares in 2025/26. This was already the lowest in more than 30 years of industry records. Of this, 1,370 hectares were harvested, or 93% of the planted area. Average yield reached 117.6 tonnes per harvested hectare, compared with 104.4 tonnes in 2024/25, and average brix was 4.75.
Field preparations were delayed in some areas due to persistent wet weather during winter. Planting started on 24th September and is expected to finish by early November. Water security is moderate to good.

BRAZIL

The harvest is estimated at 99% complete to date with a few areas remaining to be harvested in Sao Paulo and Goias and estimated at close to **1.31 million tonnes**.
The season was marked by adverse weather conditions, linked with a strong El Nino, with high rainfall volumes persisting forlong periods which prevented operations from proceeding as planned by the processing plants. Brix levels have been closing below normal, under 4.5 in the main producing regions, fruther reducing indutrial yield.

	AREA (ha)				VOLUME (T)			
	2024	2025	2026	EV 26X25	2024	2025	2026	EV 26.25
TOTALS	**18.757**	**16.145**	**15.100**	**-6%**	**1.678.290**	**1.420.000**	**1.296.500**	**-9%**
GOIÁS	13.319	10.660	10.250	-4%	1.263.000	995.000	923.000	-7%
SÃO PAULO	2.738	2.665	2.320	-13%	183.800	190.000	147.500	-22%
MINAS GERAIS + PERNAMBUCO	2.700	2.530	2.330	-8%	231.490	224.000	226.000	1%

CHILE

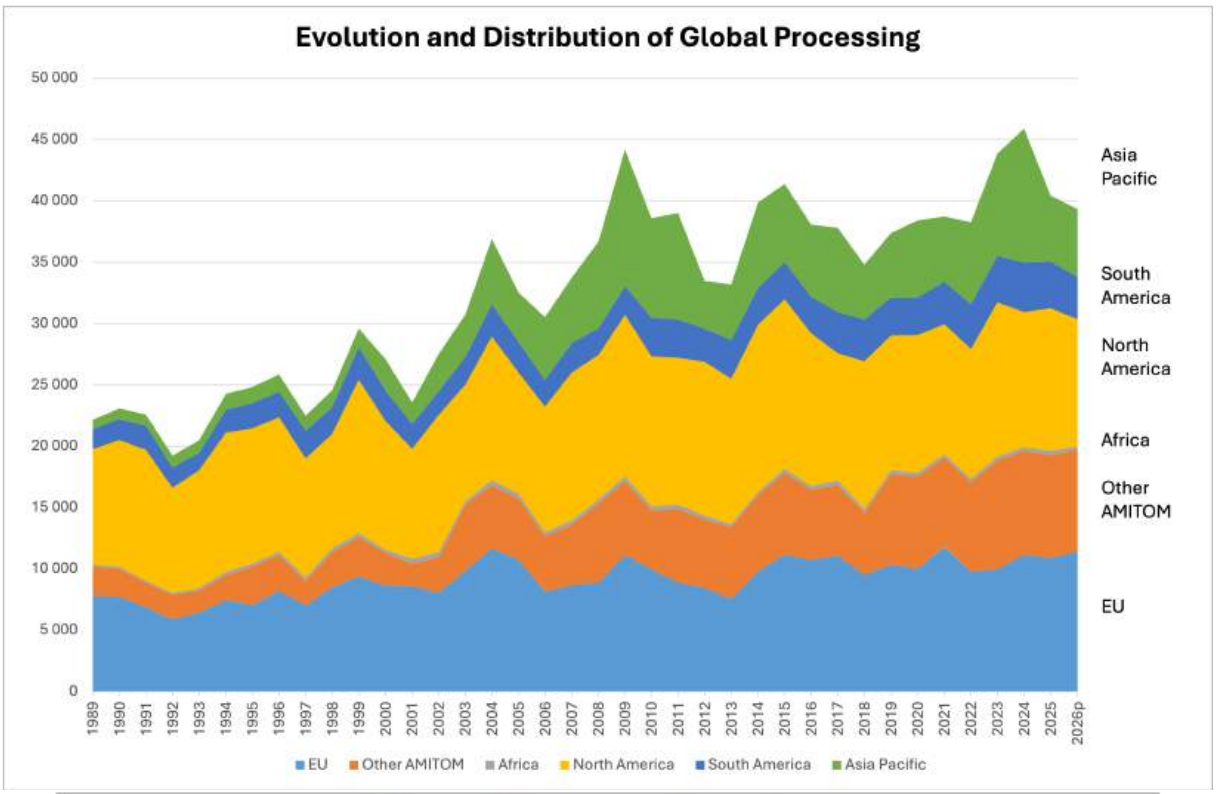
October has been a historically rainy month in Chile. October is a key month in the tomato transplanting season, so the effects of this rain are significant. It has seriously delayed and complicated transplanting, and many areas are still waterlogged and flooded. In Santiago (Metropolitan Region), October has already accumulated 146 mm, more than double the previous October record of 64.8 mm set in 1987. In O'Higgins, the rains in early October alone left around 70 mm in the valley and up to 150 mm in the foothills, followed by further storms of 30 to 40 mm. In Maule, several frontal systems have brought repeated heavy rain alerts, with 25 to 35 mm per event in the valley and foothills.
As of today, this leads to expect a drop of around 10% in harvest production, which could perhaps reach 20% if the rains continue. In terms of planted area, this means that the 12,500 hectares reported previously could fall to around 11,500 hectares, or even below 11,000 hectares if conditions do not improve in November. A better estimate will be available at the end of November.

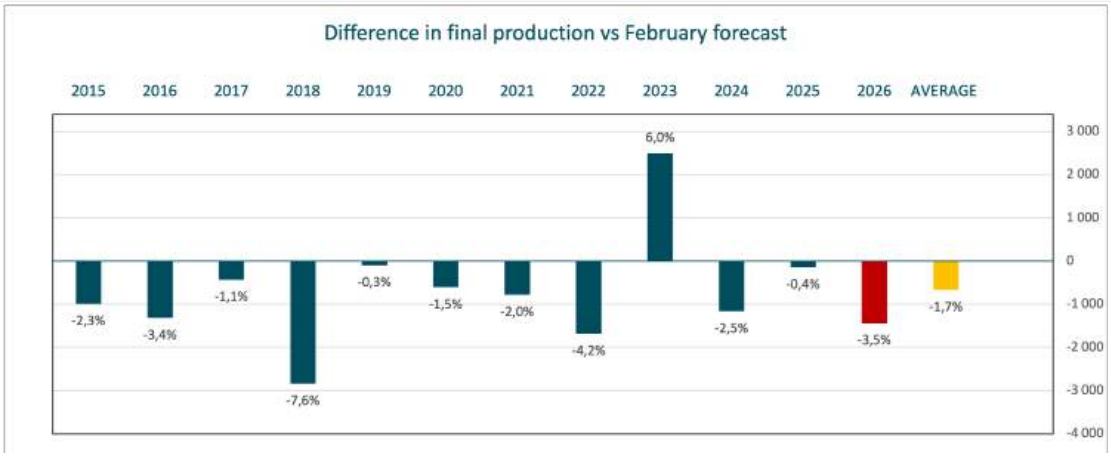
PERU
Harvesting started in the first half of October and will continue until February 2027, with an estimated production of **150,000 tonnes** of tomatoes.
The effect of El Niño has been noticeable, as temperatures have been higher than normal, which has meant increased irrigation water use and greater pest pressure, but this will not affect crop yields.

SOUTH AFRICA
The provisional number for 2026 production is **125,000 tonnes** and the estimate for the 2027 season is a **120,000 tonnes** production.
Drivers are still the low cost of imported paste and the risk of El Nino on irrigation water supply.

GLOBAL PRODUCTION

The final production volume in 2026 is **39.37 million tonnes**, -2.6% from the 40.43 million tonnes processed in 2025, and -3.5% below the february 2026 erly forecast of 40.75 million tonnes.





World production estimate of tomatoes for processing

Date of last update: 28/10/2026

World Processing Tomato Council

			2024 FINAL		2025 FINAL		2026 PRELIMINARY		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.	752	Mem.	668	-3,6%
		France	168	Mem.	186	Mem.	137	Mem.	171	-26,3%
		Greece	510	Mem.	515	Mem.	440	Mem.	472	-14,6%
		Hungary**	120	Mem.	97	Mem.	65	Mem.	109	-33,0%
		Iran**	1 400	Mem.	1 800	Mem.	1 750	Mem.	1 733	-2,8%
		Israel	184	Mem.	191	Mem.	190	Mem.	191	-0,5%
		Italy	5 272	Mem.	5 840	Mem.	6 356	Mem.	5 505	8,8%
		Malta**	7	Mem.	7	Est.	7	Est.	7	0,0%
		Portugal***	1 500	Mem.	1 305	Mem.	1 385	Mem.	1 435	6,1%
		Serbia**	13	Misc.	42	Misc.	55	Mem.	25	31,0%
		Spain***	3 080	Mem.	2 410	Mem.	2 565	Mem.	2 697	6,4%
		Syria**	40	Est.	40	Est.	40	Est.	40	0,0%
		Tunisia	1 000	Mem.	947	Mem.	840	Mem.	924	-11,3%
		Turkey	2 700	Mem.	2 200	Mem.	2 200	Mem.	2 533	0,0%
		Ukraine**	550	Mem.	470	Mem.	500	Mem.	507	6,4%
		Subtotal AMITOM	**17 228**		**16 870**		**17 302**		**17 063**	**2,6%**
		of which members in EU	**10 717**		**10 400**		**10 975**		**10 441**	**5,5%**
	OTHER MEMBERS	Brazil	1 650	Mem.	1 437	Mem.	1 296	Mem.	1 553	-9,8%
		Canada	493	Mem.	608	Mem.	518	Mem.	540	-14,8%
		California	9 999	Mem.	10 537	Mem.	9 365	Mem.	10 697	-11,1%
		China	10 450	Mem.	4 900	Mem.	5 150	Mem.	7 783	5,1%
		Japan	26	Mem.	22	Mem.	23	Mem.	25	4,5%
		Nigeria	1	Misc.	1	Misc.	1	Mem.	1	0,0%
		Subtotal Other Members	**22 619**		**17 505**		**16 353**		**20 599**	**-6,6%**
	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.	670	Misc.	660	3,1%
		Slovakia	20	Est.	20	Est.	20	Est.	20	0,0%
		USA excluding California	475	Misc	475	Est.	455	Est.	475	-4,2%
		Subtotal Non Members	**2 990**		**2 970**		**2 970**		**2 947**	**0,0%**
		Total Northen Hemisphere	**42 837**		**37 345**		**36 625**		**40 609**	**-1,9%**
SOUTHERN HEMISPHERE	MEMBERS	Argentina	630	Mem.	621	Mem.	431	Mem.	612	-30,6%
		Australia	211	Mem.	211	Mem.	161	Mem.	177	-23,7%
		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.	125	Mem.	153	-21,9%
		Subtotal members	**2 431**		**2 492**		**2 167**		**2 360**	**-13,0%**
	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 Southen Hemisphere	**3 026**		**3 085**		**2 745**		**2 953**	**-11,0%**
		GENERAL TOTAL	**45 863**		**40 430**		**39 370**		**43 561**	**-2,6%**
		of which members of the WPTC	42 278		36 867		35 822		40 022	-2,8%
		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

* Previousely 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