

Roundtable on Tomato Processing in 2025



The 2025 Tomato News Conference

The World Processing Tomato Council



The 2025 Tomato News Conference @ANUGA

European Union

GREECE



European Union

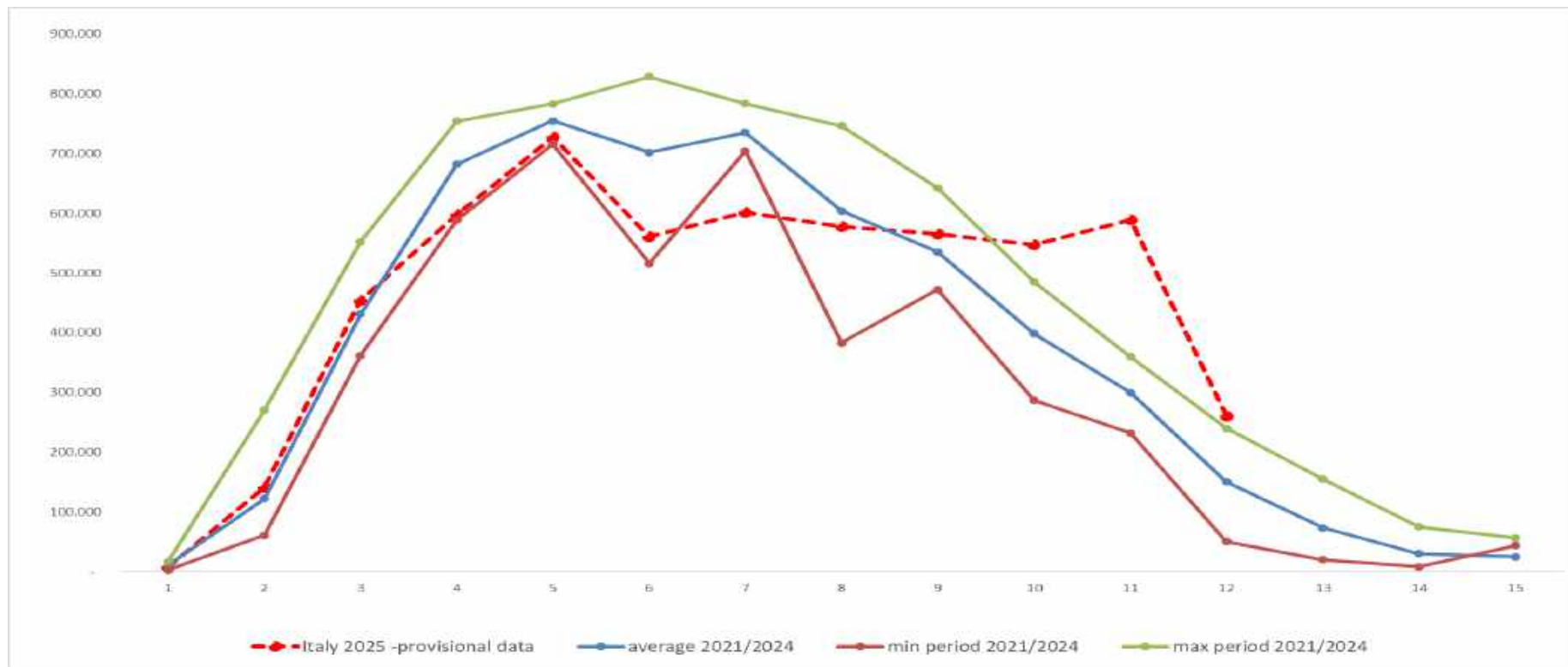
ITALY Production 2021 -2025 in tonnes



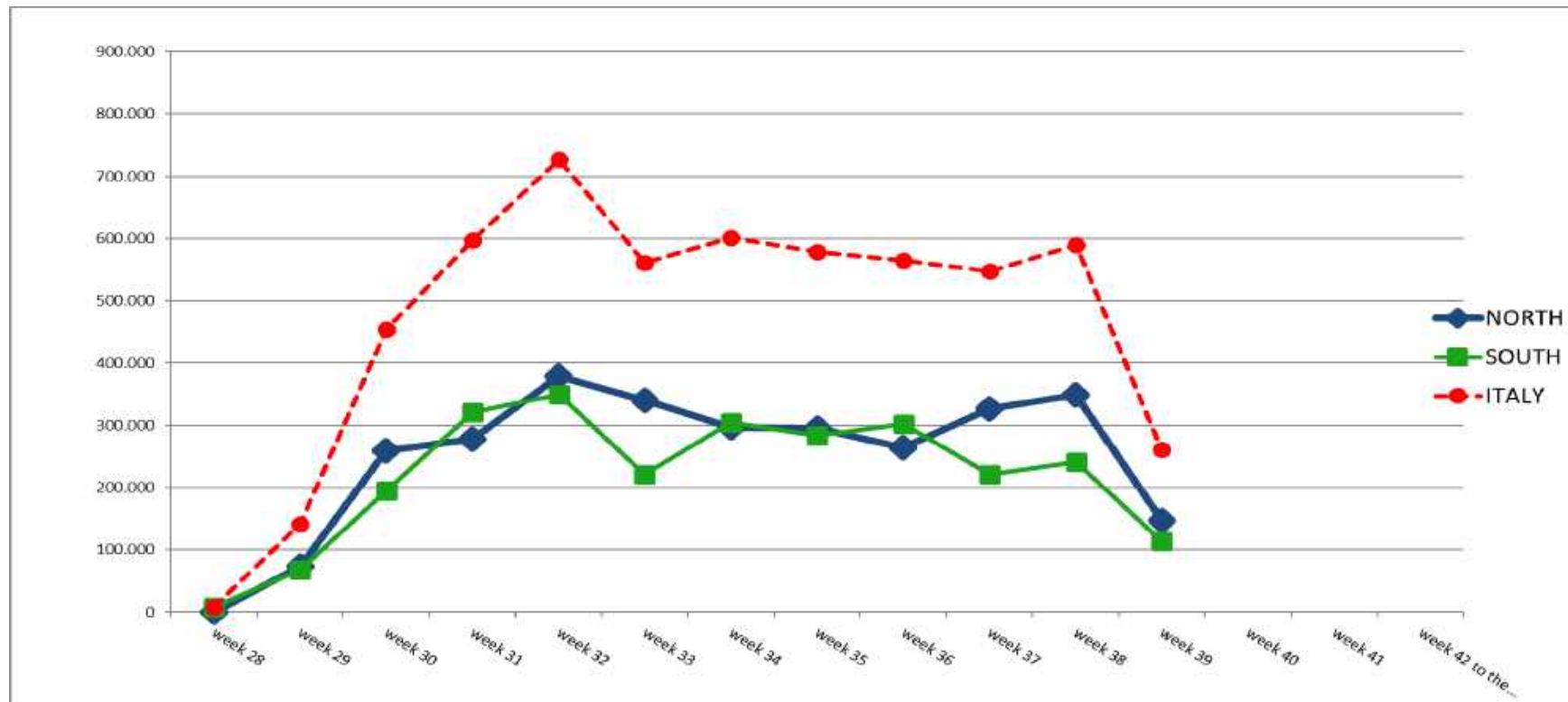
| | PROCESSED QUANTITY | | | | |
|------------------|--------------------|------------------|------------------|------------------|------------------------|
| | Season 2021 | Season 2022 | Season 2023 | Season 2024 | Season 2025 - estimate |
| CENTER and SOUTH | 2.968.676 | 2.591.608 | 2.605.528 | 2.867.254 | 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: Weekly trend 2025 – 39° week



Italy: Trend 2021 – 2025 (provisional)



PORTUGAL



European Union

SPAIN



European Union

| | 2024 | 2025 p | Variation 2025 vs 2024 |
|----------|-------|--------|---------------------------|
| Bulgaria | 60 | 40 | - 33 % |
| France | 168 | 175 | + 4 % |
| Greece | 510 | 510 | stable |
| Hungary | 120 | 95 | - 21 % |
| Italy | 5 272 | 5 700 | + 7 % |
| Portugal | 1 500 | 1 300 | - 13 % |
| Spain | 3 080 | 2 400 | - 22 % |

in 1000 metric tonnes



Other AMITOM countries

EGYPT



- Summer Season was exceptional this year in particularly for colour achieving +2.20 in final product.
- Many days with high temperatures in average over 40°C advancing maturation
- Summer harvesting finished on 20th September
- Harvesting of Nili crop from mid- November to end of December
- Winter Crop (in southern governorates) starts from January till April.
- Forecast for 2025 remains 780,000 tonnes
- Initial forecast for 2026 is 800,000 tonnes



Other AMITOM countries

EGYPT



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



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



IRAN



Iran Crop 2025

Production Highlights



Iran is the 7th largest producer of tomatoes in the world

01

2025 Forecasted Volume: ~1.8 million metric tons of processed tomatoes
👉 **Growth: Nearly 30% increase compared to 2024 (1.4 million tons)**

02

Harvest delayed 2–3 weeks
Processing until end of October 2025

03

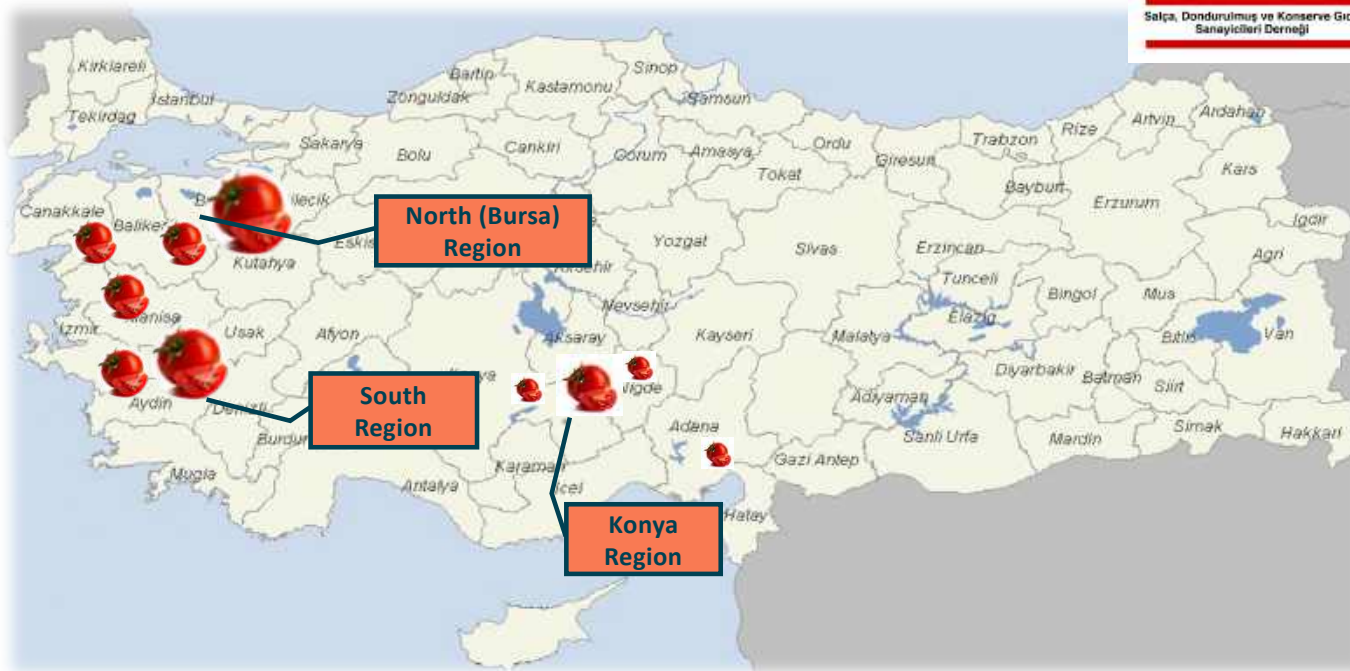
Challenges

- Water shortage and electrical power cuts
- Political tensions → market uncertainties
- Continued pressure from fluctuating energy and labor costs



Other AMITOM countries

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
- ❖ Total production : 2.2 million tonnes



Other AMITOM countries

| | 2024 | 2025 p | Variation 2025 vs 2024 |
|---------|-------|--------|---------------------------|
| Egypt | 624 | 780 | + 25 % |
| Iran | 1 400 | 1 800 | + 28 % |
| Tunisia | 1 000 | 940 | - 6 % |
| Turkey | 2 700 | 2 200 | - 18% |
| Ukraine | 550 | 500 | - 9 % |

in 1000 metric tonnes

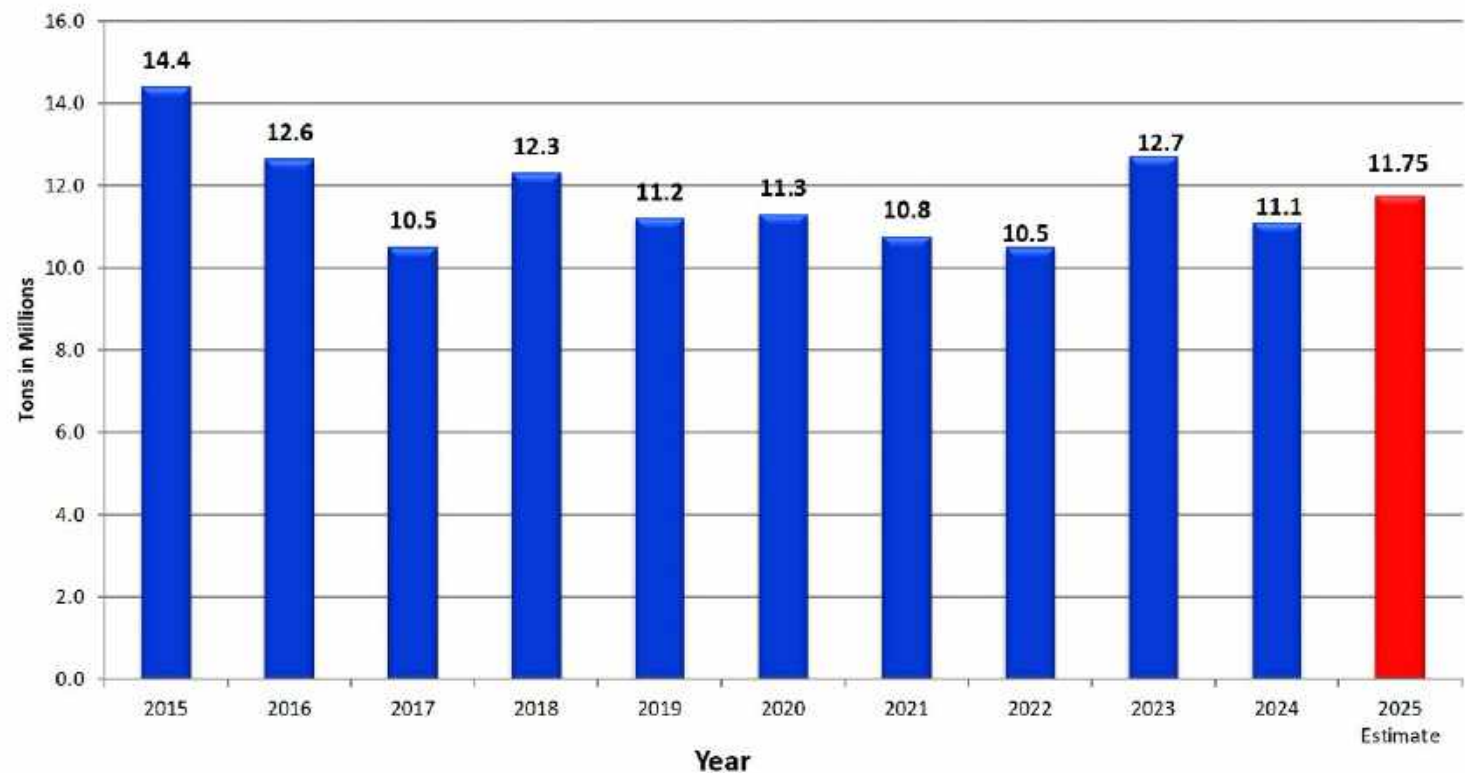


Other Northern Hemisphere countries

CALIFORNIA



California tonnage trends (in million short tons)



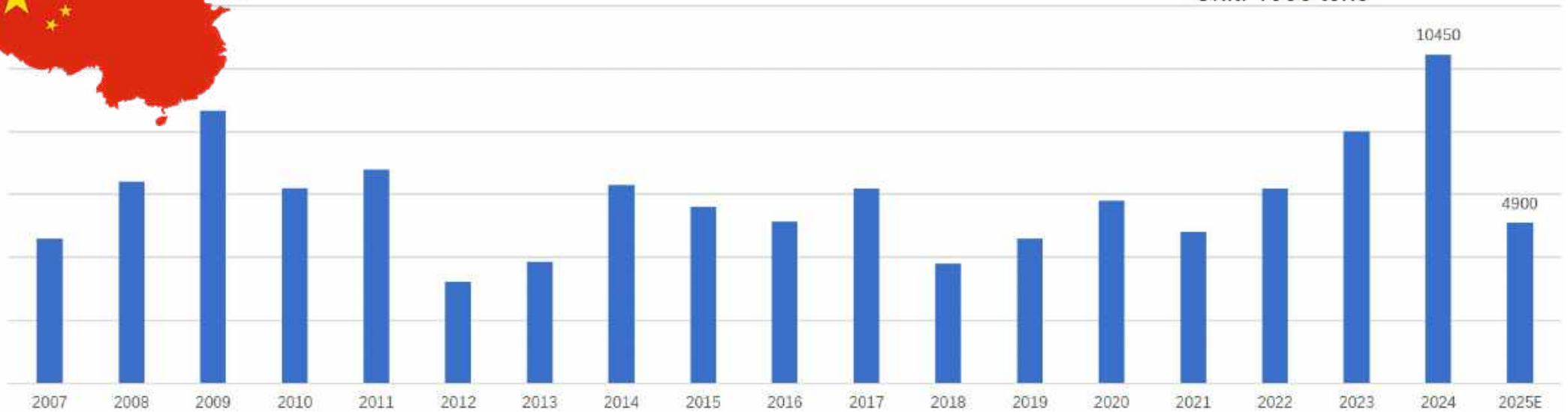
Other Northern Hemisphere countries

CHINA



Processing volume in China

Unit: 1000 tons



Other Northern Hemisphere countries

JAPAN



Other Northern Hemisphere countries

| | 2024 | 2025 p | Variation 2025 vs 2024 |
|------------|--------|--------|---------------------------|
| Canada | 493 | 575 | + 17 % |
| California | 10 000 | 10 400 | + 4 % |
| China | 10 450 | 4 900 | - 53 % |
| Japan | 26 | 25 | - 4 % |

in 1000 metric tonnes



Southern Hemisphere countries

BRAZIL



| | AREA | | VOLUME | |
|---------------|--------|--------|-----------|-----------|
| | 2025 | 2025 | 2025 | 2025.5 |
| TOTALS | 18.079 | 16.145 | 1.768.900 | 1.437.000 |

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



Southern Hemisphere countries

CHILE



Southern Hemisphere countries

PERU



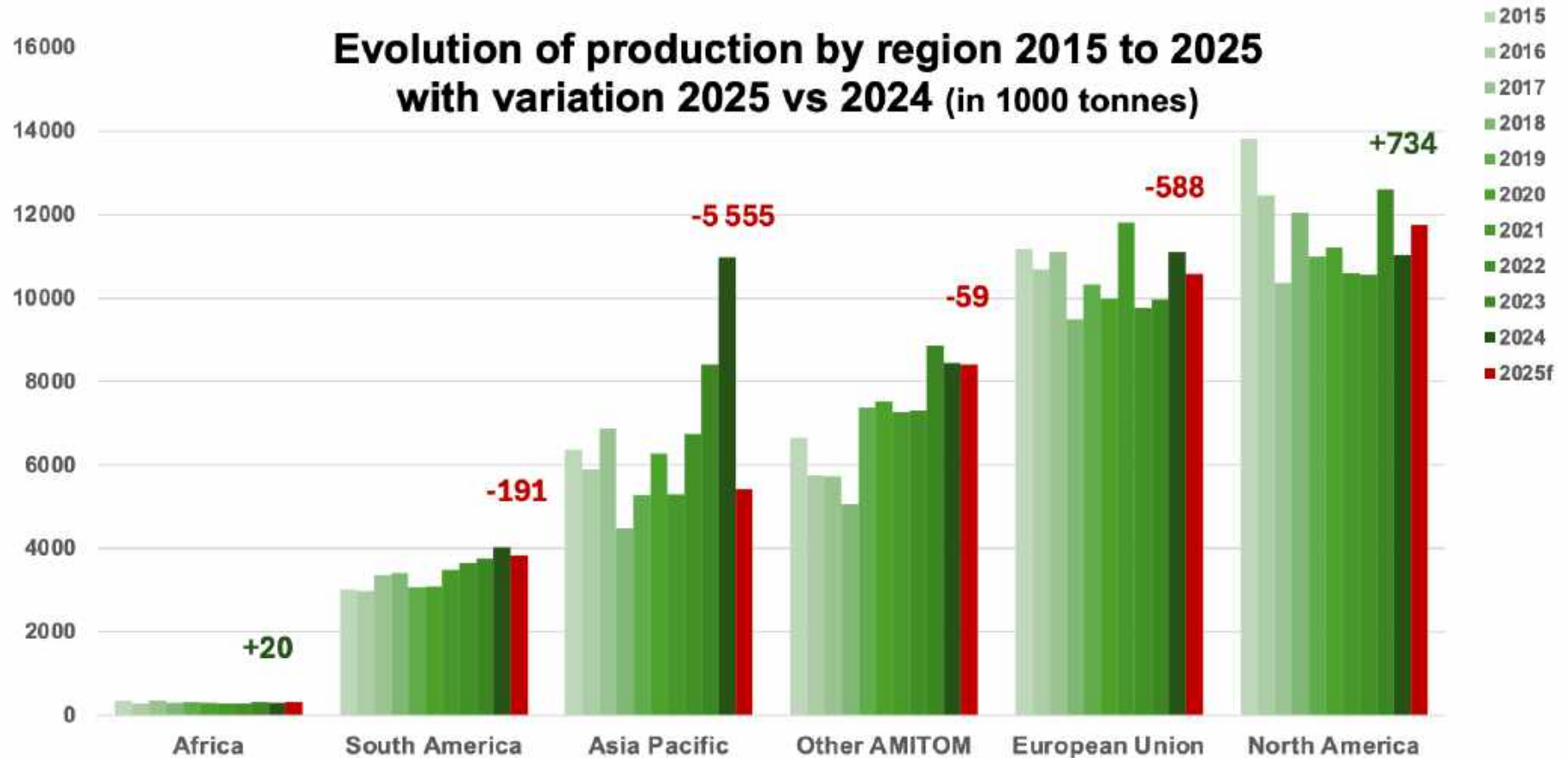
Southern Hemisphere countries

| | 2024 Final | 2025 Final | Variation 2025 vs 2024 | 2026 Forecast |
|--------------|---------------|---------------|---------------------------|------------------|
| Argentina | 630 | 620 | - 2 % | 550 |
| Australia | 211 | 211 | stable | 166 |
| Brazil | 1 650 | 1 437 | - 14 % | 1 437 |
| Chile | 1 300 | 1 340 | + 3 % | 1 300 |
| Peru | 150 | 160 | + 7 % | 150 |
| South Africa | 140 | 160 | + 14 % | 130 |

in 1000 metric tonnes



Evolution by region



Evolution by region

