PROCESSING TOMATO MARKET

Price, Production & Weather — Region by Region

CALIFORNIA · ITALY · SPAIN · PORTUGAL · CHILE · CHINA

Production 2008–2026 · Export price (HS 200290) 2009–2026

Prepared October 2026 · WPTC production data as of 22 October 2026

Today’s Roundtable

Six producing regions, one conversation: price, production and weather.

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Executive Summary

Drought drove a 2022–2023 price spike; the market has spent 2024–2026 correcting.

45.9M t

World production peak, 2024

39.3M t

2026 WPTC estimate (–14% from peak)

+94%

California price surge, 2021→2023

-42%

Chile price pullback from 2023 peak

A severe 2022 drought across the Mediterranean and California cut supply; 2023-season contract prices hit the highest levels in the 2009–2026 series in most regions.

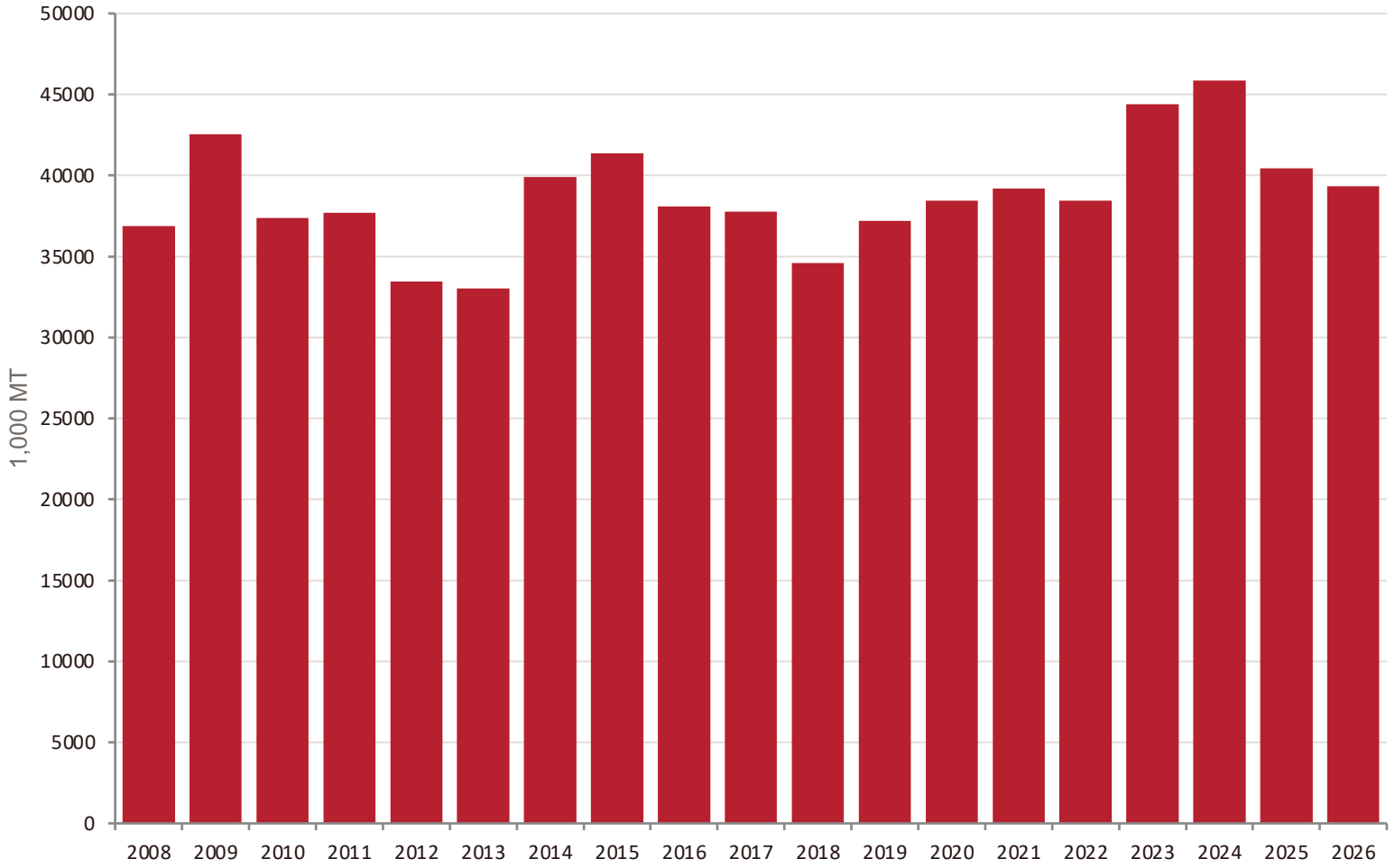
As Mediterranean and Californian volumes recovered, prices corrected: Spain, Portugal, Chile and California all trade below year-ago levels as of mid/late-2026.

Italy and China are the exceptions — both trending higher year-on-year even as world production is estimated lower for 2026.

Weather remains the dominant swing factor: Iberia’s drought, Italy’s 2023 floods, California’s drought-to-flood reversal, Inner Mongolia’s 2025 floods and China’s 2026 El Niño and water-limit cut all show up directly in the production data.

The Global Picture

World processing-tomato production, 1,000 metric tonnes (2026 = WPTC estimate, 22 Oct)



2022

Drought trough

Mediterranean & Californian drought cuts the harvest to 38.4M tonnes.

2023–24

Back-to-back records

Every major region expands at once — 44.4M, then a record 45.9M tonnes.

2025–26

Pull-back, then weather

Growers cut acreage after oversupply; heat and water limits trimmed 2026 further, to an estimated 39.3M tonnes.

California

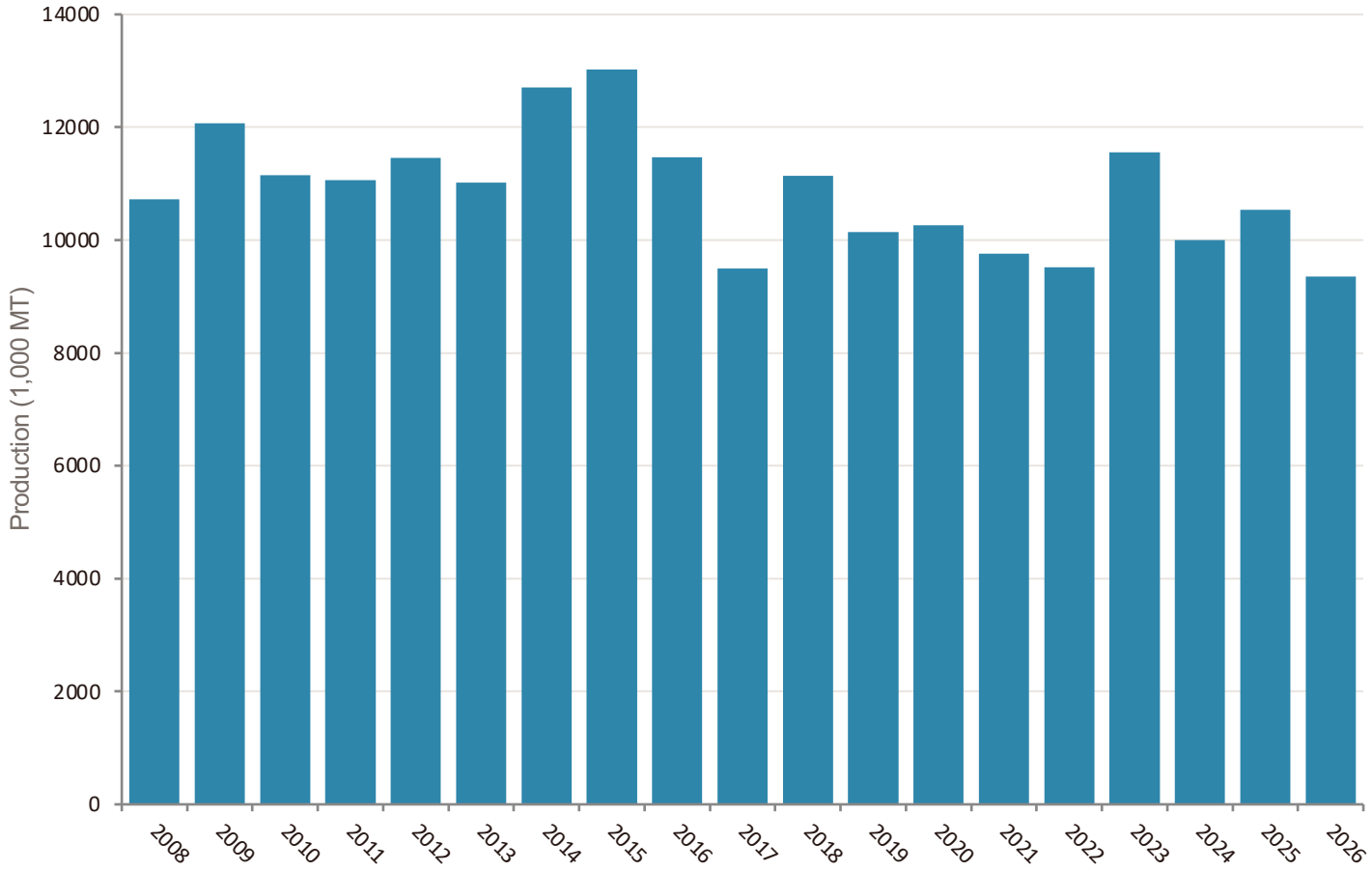
USA — Central Valley

Latest price (USD/T)

1,260 -4.8%

2026 est. production (kt)

9,357 -11.2%



KEY WEATHER & MARKET EVENTS

2020–22

Three straight years of extreme drought; 2022 crop only 86% of target.

Winter 22/23

Unprecedented atmospheric-river storms flood the Central Valley; planting delayed to May.

2024–25

Healthy reservoirs and near-perfect spring weather; yields ~50 tons/acre.

2026

Near-normal water year and a strong back half kept yields at or above contract; ~9.36M t (–11%) reflects smaller contracted volumes.

Italy

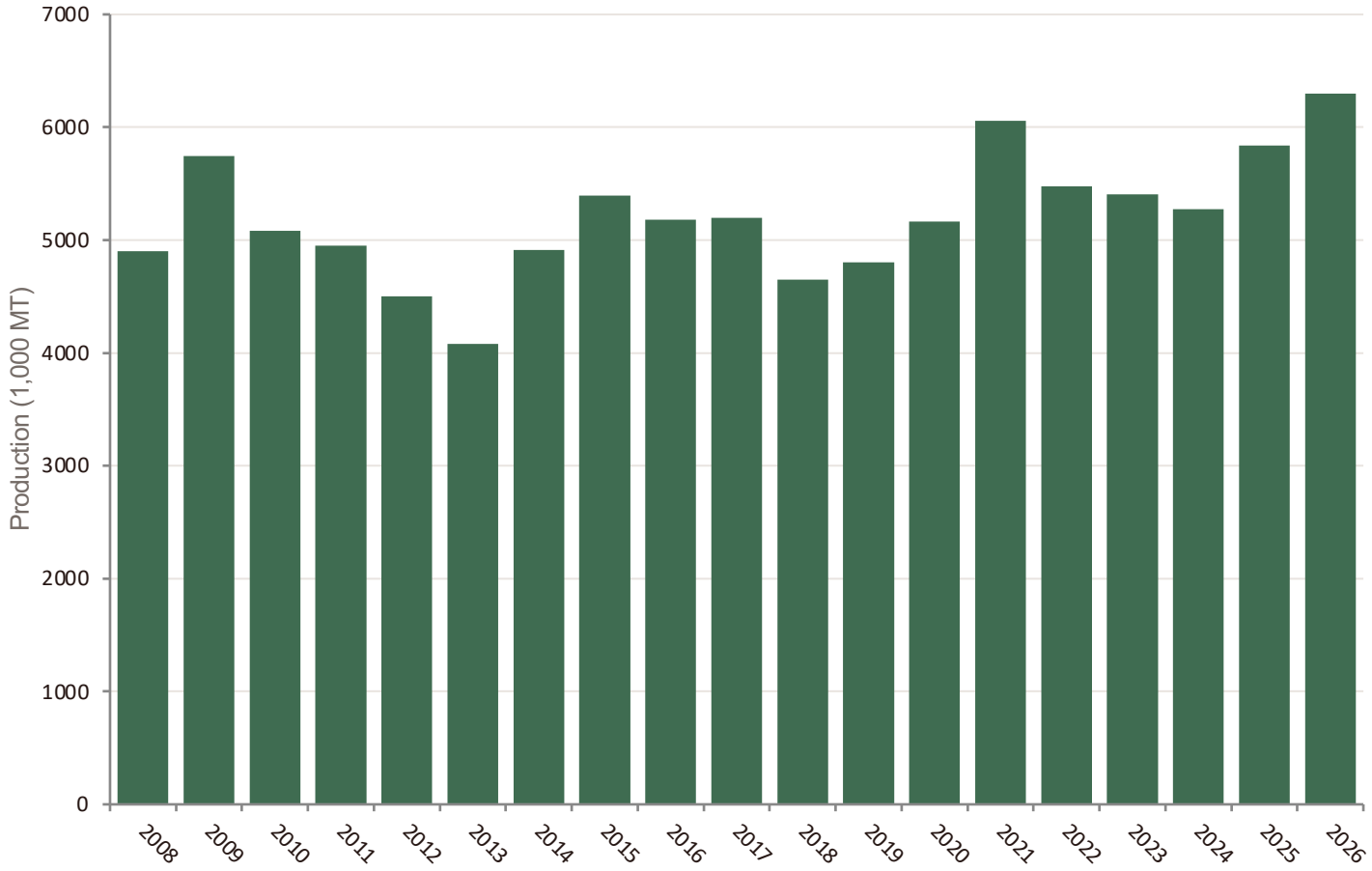
Northern & Southern basins

Latest price (USD/T)

1,791 +5.9%

2026 est. production (kt)

6,300 +7.9%



KEY WEATHER & MARKET EVENTS

May 2023

Emilia-Romagna floods twice in two weeks: 17 dead, ~1,500 ha destroyed, €10B+ damage.

2024

"Long and difficult" season — drought south, floods north; northern basin output -14%.

2025

Puglia reservoirs near 50% capacity; growers flag up to 40% planted-area cuts.

2026

Record-early harvest, but heat cut Brix (North avg 4.78) and 9–11 Sept storms paused deliveries. WPTC estimate 6.30M t, still a series high.

Spain

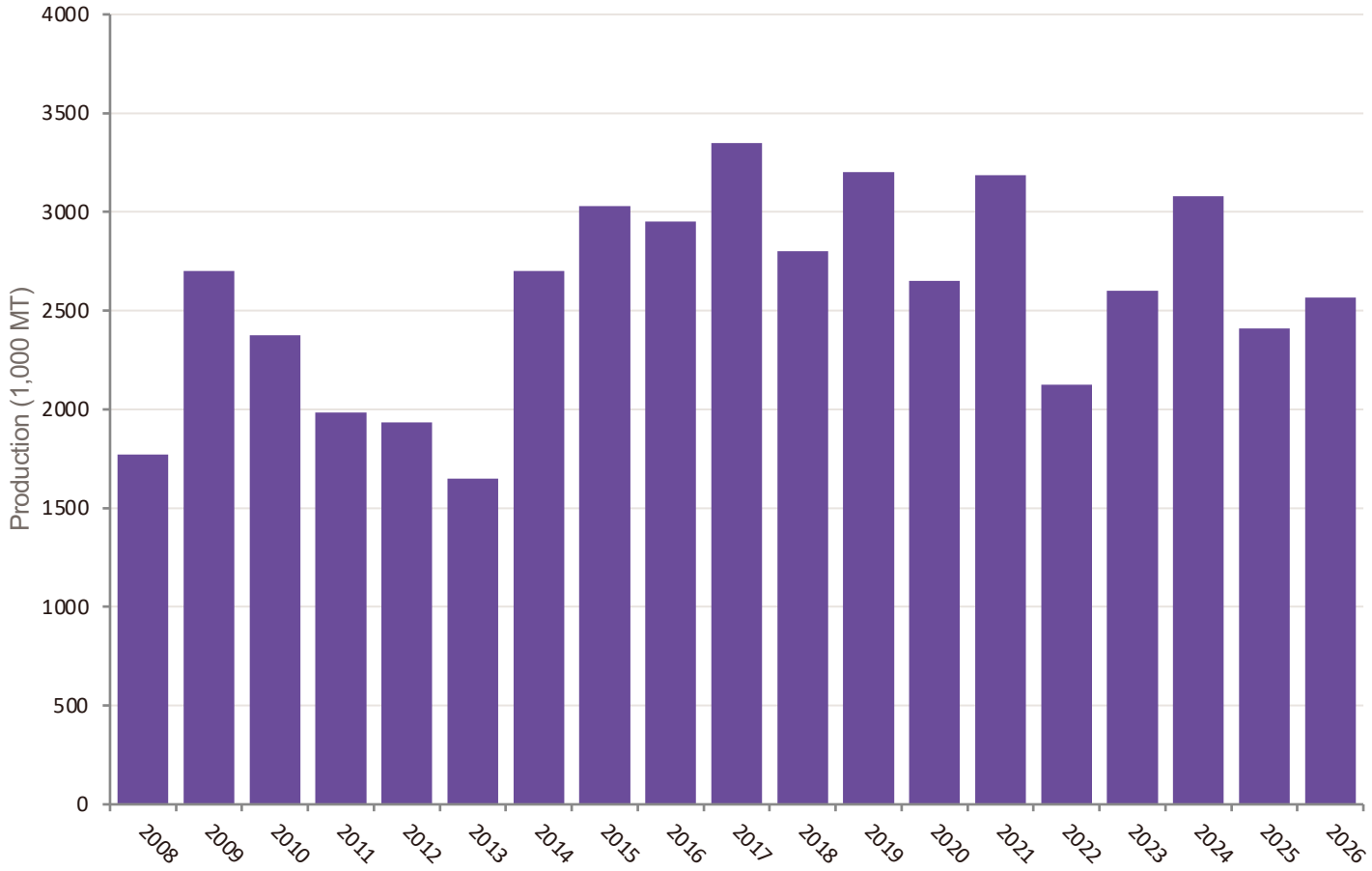
Extremadura & Andalucía

Latest price (USD/T)

1,415 -13.0%

2026 est. production (kt)

2,565 +6.4%



KEY WEATHER & MARKET EVENTS

H2 2022

Severe, prolonged Iberian drought begins; reservoirs fall sharply over winter.

Spring 2023

Driest April on record; Extremadura reservoirs reach "emergency state."

2024–25

Water availability recovers; production rebuilds but stays below the 2021 peak.

2026

Heatwaves caused flower abortion and mite outbreaks: 8% (Extremadura) and 12% (Andalucía) below forecast, yet 2.565M t is +6% on 2025.

Portugal

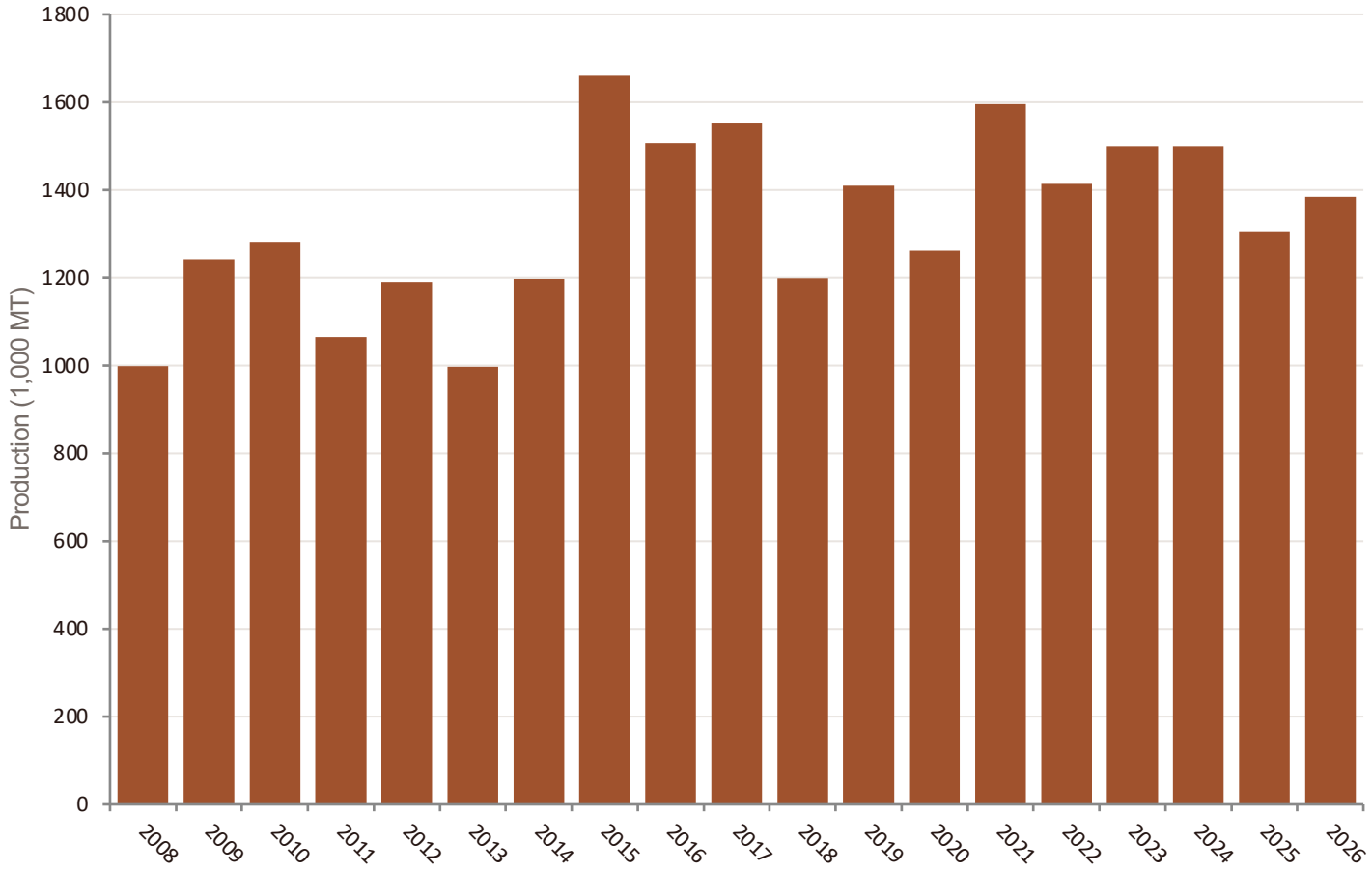
Alentejo / Ribatejo

Latest price (USD/T)

1,311 -9.9%

2026 est. production (kt)

1,385 +6.1%



KEY WEATHER & MARKET EVENTS

2022

Same Iberian mega-drought cuts national production; some factories close early.

2023

Drought persists through the first half of the year before easing.

2024–25

Reservoirs refill; volumes recover but remain below the 2021 high.

2026

Late-Aug rain paused factories; late fields gave green, immature fruit and low Brix. Final 1.385M t: +6% on 2025, 3% under contracts.

Chile

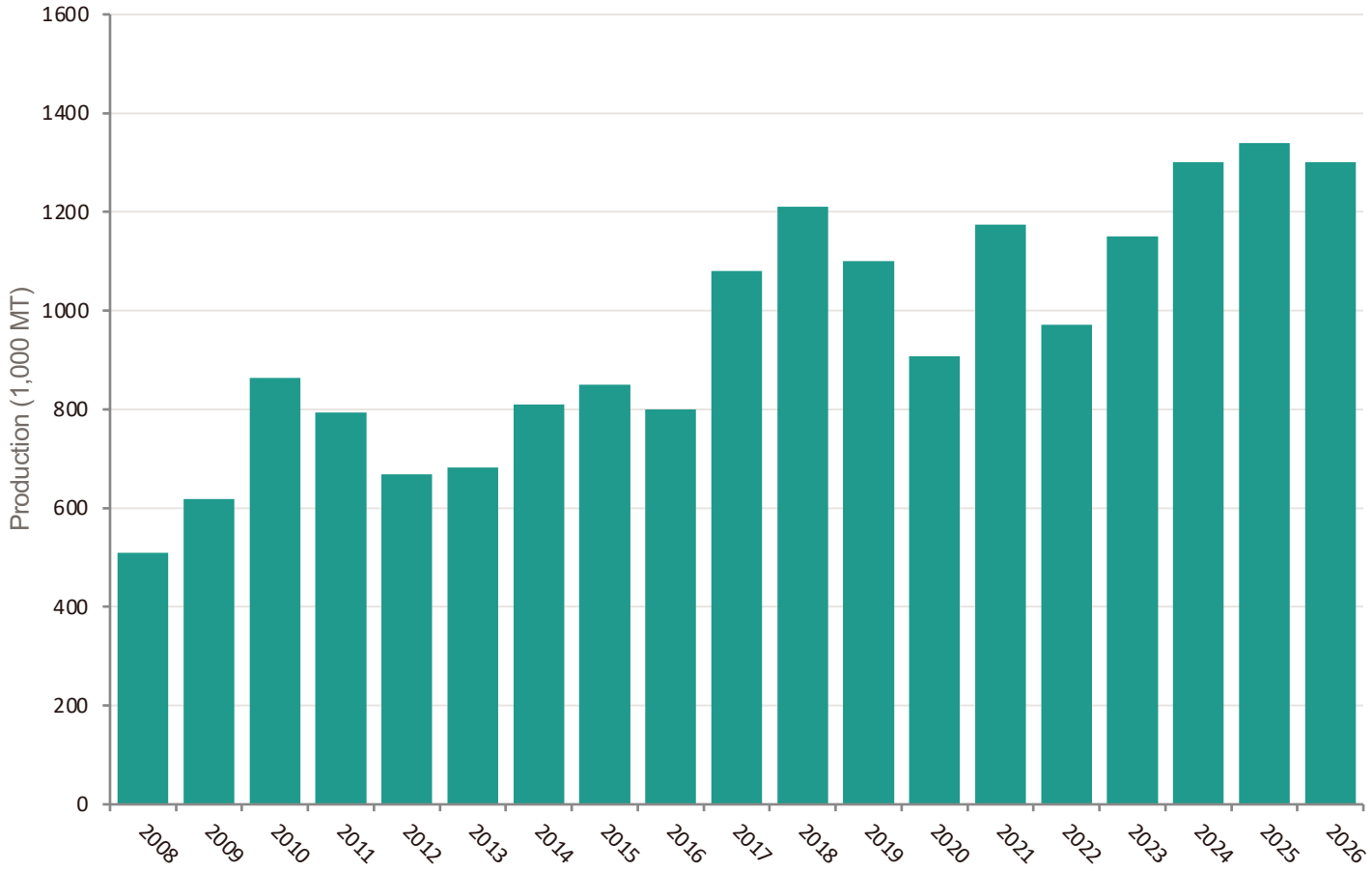
O'Higgins / Maule

Latest price (USD/T)

1,024 -9.3%

2026 est. production (kt)

1,300 -3.0%



KEY WEATHER & MARKET EVENTS

2010s–

Decade-plus "mega-drought," but concentrated in the northern Atacama/Coquimbo regions.

Ongoing

The tomato belt (O'Higgins/Maule) sits south of the worst-hit zones, comparatively insulated.

2024

Record 1.34-million-tonne crop on good water availability.

2026/27

Above-average Andes snowpack secures irrigation; area trimmed ~10%. El Niño spring rain and late frost are the risks to watch.

China

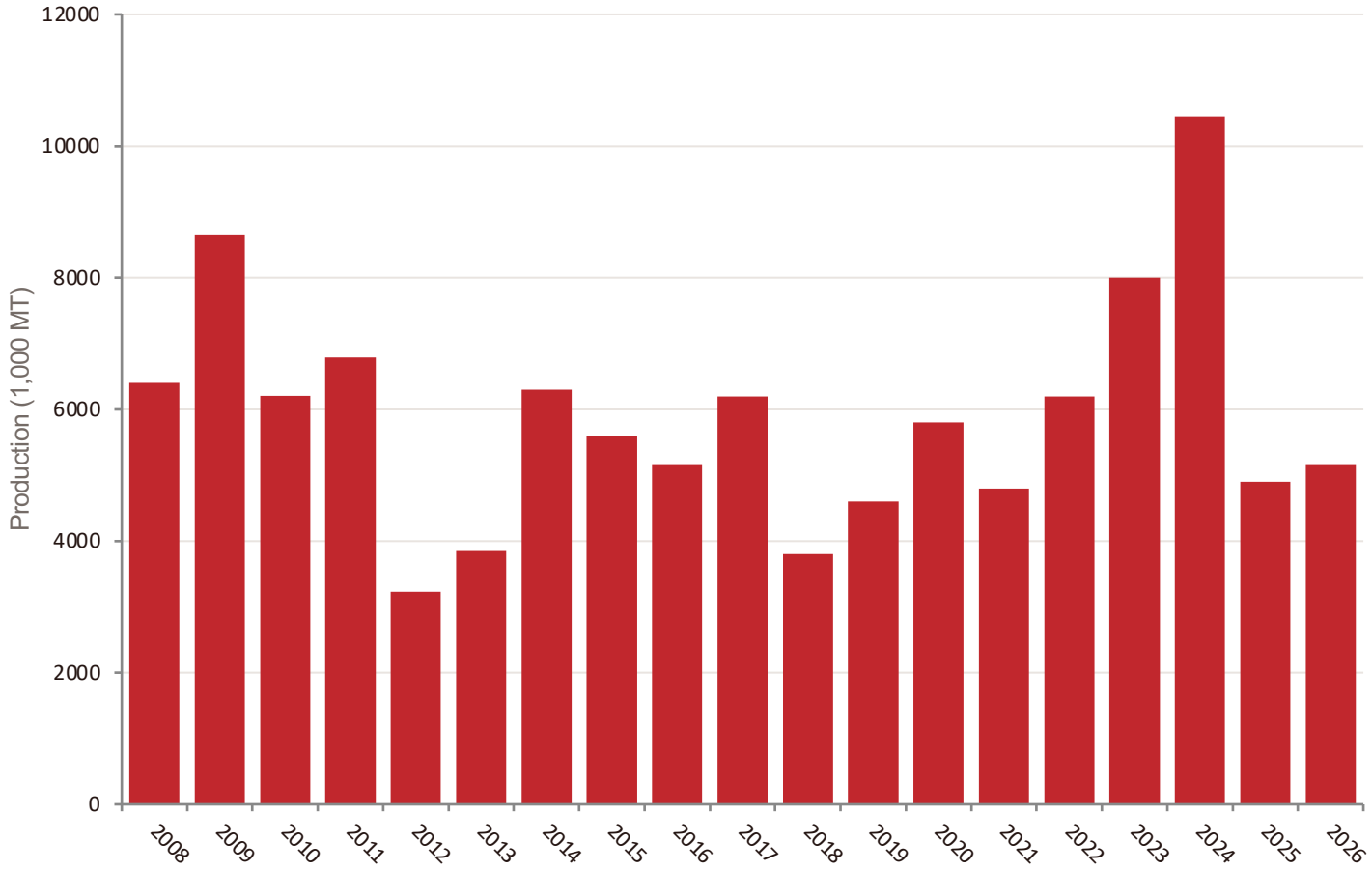
Xinjiang & Inner Mongolia

Latest price (USD/T)

754 +4.6%

2026 est. production (kt)

5,150 +5.1%



KEY WEATHER & MARKET EVENTS

Xinjiang

80%+ of output; a dry climate that normally suits tomatoes, but 2026 brought El Niño stress in June–July and water-use limits.

2024

Planted area nearly doubles; record 10.45-million-tonne crop leads to oversupply.

Jul–Aug 2025

Inner Mongolia floods hit ~20% of planted area; running factories fall from 106 to 82.

2026

Forecast cut 5.85M → 5.15M t on Xinjiang El Niño heat, water-restriction policy, and Inner Mongolia rain and hail.

Key Takeaways

The 2022–2023 Mediterranean/Californian drought and the price spike it produced remain the single largest event in this dataset.

Weather drives the year-to-year variance: Italy's split drought/flood seasons, Iberia's recovery, Inner Mongolia's 2025 floods and this year's Southern European heatwaves — and a potentially record El Niño is now building for winter 2026–27.

China is currently the largest single swing factor in the global total — production roughly tripled 2012→2024, then was cut by more than half; the 2026 estimate was cut again in September on El Niño heat and water limits, and has held at 5.15M t since.

Chile is the one region where planting decisions are currently driven by competitive positioning, not water — an above-average snowpack secures this season's irrigation.

2026 production is a WPTC estimate (22 Oct) and 2026 price is a partial-year average; final 2026 volumes are due at the 28 Oct Tomato News Conference in Parma.

Weather Watch: 2026 Recap & the El Niño Winter Ahead

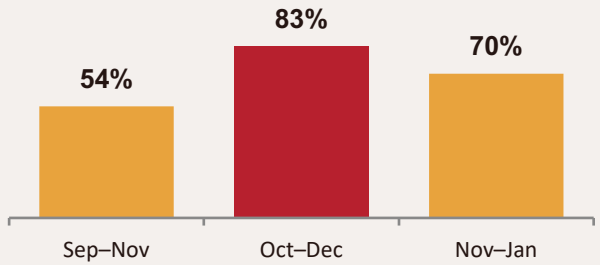
A potentially record-strength El Niño is building into winter. Left: what the 2026 weather did to each region. Right: what is sourced for 2027 — left blank where no outlook was found.

EL NIÑO STATUS (NOAA CPC, 8 OCT)

83%

chance of a historic-strength event (≥ +2.5°C) in Oct–Dec 2026, exceeding every El Niño since 1950

Odds of a historic event, by 3-month season



Advisory in place since June; a strong-to-very-strong event is likely through Jan–Mar 2027 (>83%).

REGION	2026 SEASON: WHAT HAPPENED	2027: WATCH LIST
California	Near-normal water year and a strong back half kept yields at or above contract (~9.36M t, –11% on smaller contracts).	NOAA's 15 Oct outlook favors a wetter winter and the state declared an emergency. Good for water; flood and late-planting risk (cf. 2023).
Italy	Heat cut Brix (North avg 4.78); storms on 9–11 Sept paused the harvest. North final >3.2M t vs. 3.25M forecast.	No sourced 2027 outlook
Spain	Heatwaves caused flower abortion and mite outbreaks: 8% (Extremadura) and 12% (Andalucía) under forecast, yet +6% on 2025.	Water is not the constraint: Guadiana reservoirs at 72% (7 Oct) vs. 39% in Oct 2024. Heat was the 2026 problem.
Portugal	Late-Aug rain paused factories; late fields gave green, immature fruit and low Brix. Final 1.385M t, 3% under contracts.	No sourced 2027 outlook
Chile	Dry first half of winter, then heavy July rain and above-average Andes snow. ~1.3M t processed.	Water secured; area –10%. El Niño spring rain and late frost are the risks to watch.
China	Strong El Niño weather in Xinjiang (Jun–Jul), water-use limits, and Inner Mongolia rain and hail cut the crop to 5.15M t.	No sourced 2027 outlook

SOUTHERN HEMISPHERE: EARLY 2026/27 SIGNALS (WPTC DRAFT UPDATE DATED 28 OCT, UNPUBLISHED)

Peru El Niño heat means more irrigation and pests; yields unaffected.

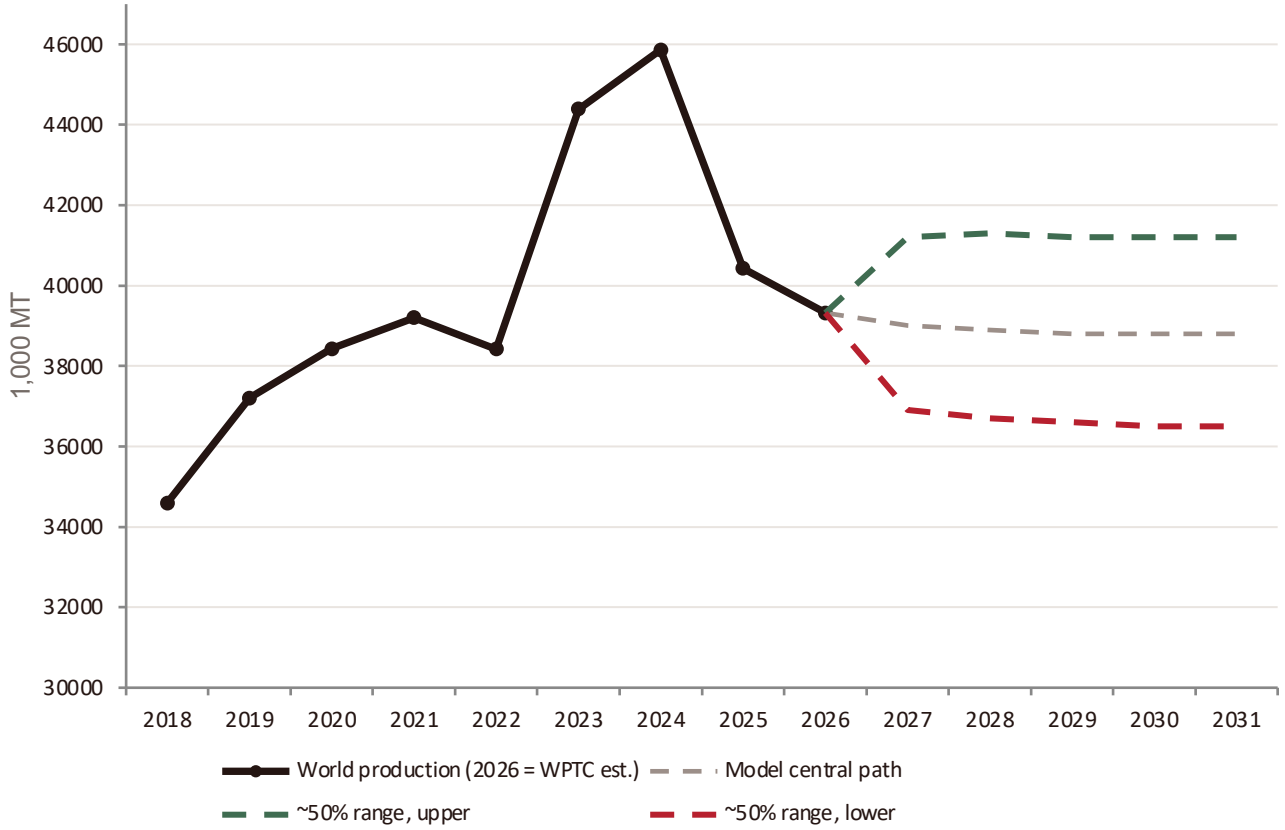
Argentina Frost in San Juan delayed planting; El Niño "a concern". ~370k t, area –8%.

South Africa 2027 estimate 120k t; El Niño is a risk to irrigation water supply.

Australia Wet winter delayed field preparation; 142k t planned.

Looking Ahead: 2027–2031 — Supply

A mean-reversion model fit to the 19-year production history, narrowed to the ~50% (interquartile) range around its central path — not a data-provider forecast, and not a substitute for knowing next year's weather.



Model: AR(1) on log-production, fit to 2008–2026 (ϕ=0.42, reverts toward a ~38.8M-tonne long-run average). Band = central path ± 0.674σ (~50% likelihood), which converges within ~2 years rather than widening indefinitely.

FIVE THEMES TO WATCH

Continued cycles, not stabilization

Three-to-five-year swings between oversupply and shortage have repeated since 2008; nothing in contract-based planting suggests that pattern breaks.

"Weather whiplash" becomes the norm

Every Mediterranean region here saw both a severe drought and a severe flood within 2022–26. A potentially record El Niño now building adds a fresh swing risk, led by California's wet winter.

China stays the wildcard

China's swings are the largest in absolute tonnes of any region — 2024–25 on grower economics, 2026 on El Niño heat and water limits. Its direction will likely dominate the global total.

Chile keeps gaining share

A structurally better water position than the Mediterranean favors continued, gradual share gains — tempered by the same competitive pricing already trimming 2026/27 area.

Set-up for a tighter market by 2028–29

Under-investment during the 2025–26 pull-back, against steady 2–3%/year demand growth, is the classic precondition for the next price upswing if a weather shock lands on lean stocks.

Sources & Notes

Data sources

- Price: derived HS 200290 export-price table (not refreshed in this update). Five regions use each country's aggregate 200290 line; California uses the "Hot Break 31 NTSS" bulk-product series, the closest available match.
- Production: WPTC World Production Estimate workbook — 2008–2025 final, 2026 as of the 22 Oct 2026 update. 2026 remains an estimate; final volumes are due at the 28 Oct Tomato News Conference.
- WPTC crop update dated 28 Oct 2026 (unpublished draft, supplied by the client): confirms final Spain (2.565M t) and Portugal (1.385M t) volumes and adds Spain's regional split and Southern Hemisphere weather. Its Italy, California, China and Canada sections were blank.

Weather reporting

- WPTC crop updates through 9 Oct 2026 (wptc.to), Tomato News, USDA NASS/FAS, Farm Progress, Italianfood.net, ANICAV, and press coverage of the 2023 Emilia-Romagna floods and 2022–23 Iberian drought (CNN, France 24, Copernicus, NZ MFAT).
- Outlook: NOAA CPC ENSO discussion (8 Oct 2026) and winter outlook (15 Oct); NWS water-year recap (May 2026); MITECO reservoir bulletins (Spain, Oct 2026 and Oct 2024); BASF Chile climate bulletins and Chilean press (Jun–Aug 2026); Stanford Daily on California's emergency declaration (23 Sept).

Notes

- A literal 0 USD/T in the source (Chile, 2009–10) was treated as "no trade reported," not a real price, and excluded.
- Year-on-year price comparisons use each region's latest available month vs. the same month one year earlier; dates vary by region.
- The 2027–31 outlook band uses an AR(1) mean-reversion model fit to this report's own historical production data (see the outlook slide for the fitted parameters) — not a third-party forecast, and it assumes the historical pattern continues.
- WPTC does not guarantee the accuracy of its estimates; the same caveat applies wherever WPTC figures are used here.