



# CROP RESULTS AND 2026 FORECASTS: AMITOM

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President

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# Presentation of AMITOM

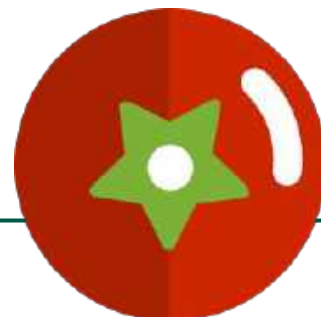
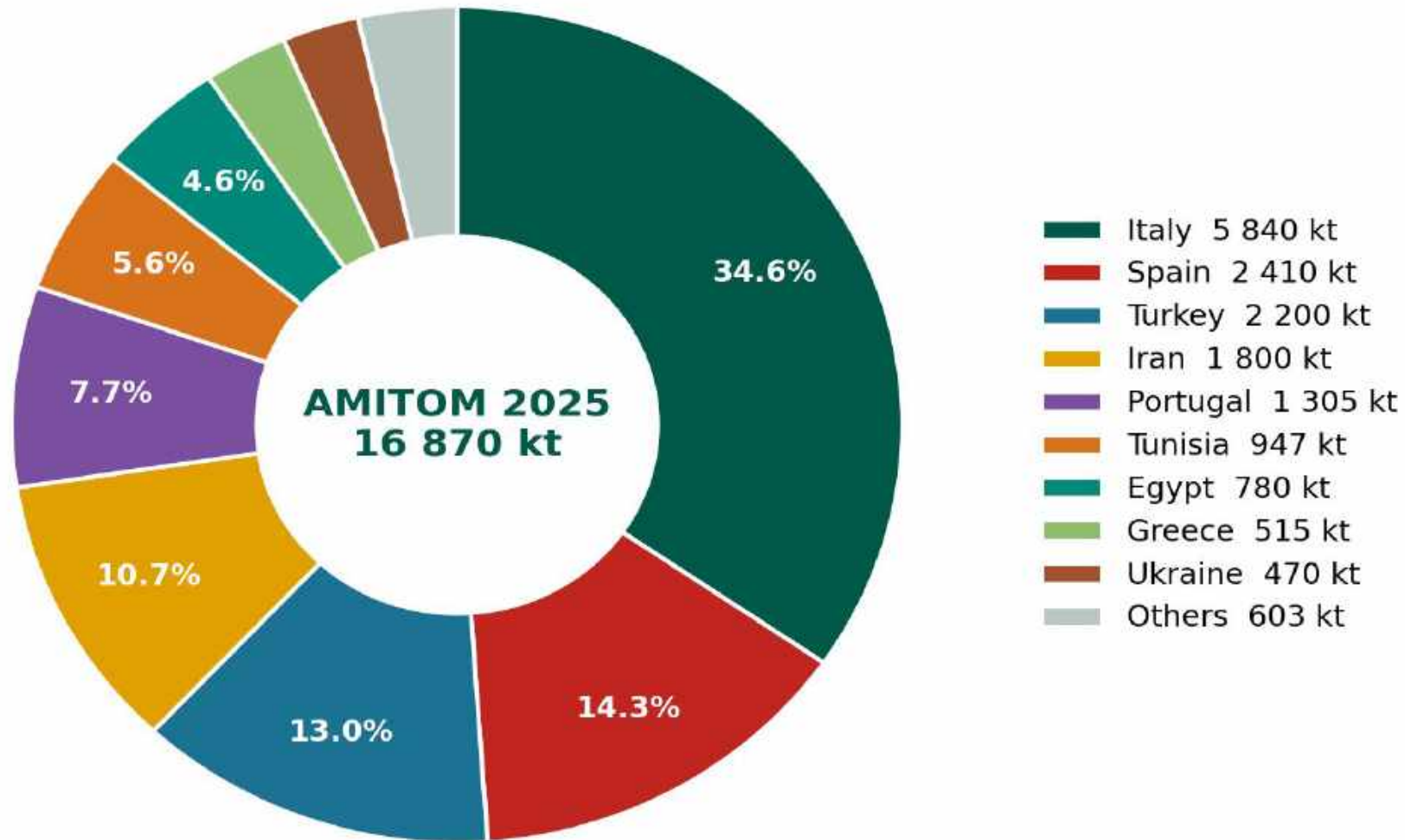


## Founded in 1979

- 7 associations in 6 EU countries
- 3 associations in 3 non-EU countries
- 6 Associate Members in 6 countries

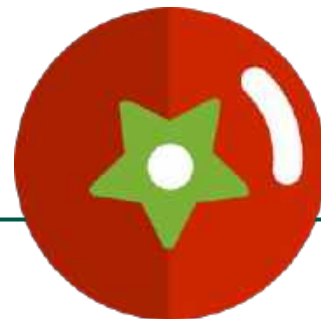


# Contribution to AMITOM processing – 2025



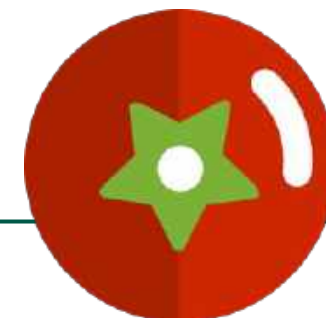
# EU Countries

	2024 Final	2025 Final	2026 Forecast	Variation 2026 vs 2025
<b>Bulgaria</b>	60	40	<b>20</b>	<b>-50%</b>
<b>France</b>	168	186	<b>150</b>	<b>-19%</b>
<b>Greece</b>	510	515	<b>450</b>	<b>-13%</b>
<b>Hungary</b>	120	97	<b>70</b>	<b>-28%</b>
<b>Italy</b>	5 272	5 840	<b>5 800</b>	0%
<b>Malta</b>	7	7	<b>7</b>	0%
<b>Portugal</b>	1 500	1 305	<b>1 300</b>	0%
<b>Spain</b>	3 080	2 410	<b>2 750</b>	<b>+14%</b>
<b>TOTAL</b>	<b>10 717</b>	<b>10 400</b>	<b>10 547</b>	<b>+1%</b>



# Other AMITOM countries

	2024 Final	2025 Final	2026 Forecast	Variation 2026 vs 2025
Egypt	624	780	<b>800</b>	+3%
Iran	1 400	1 800	<b>2 100</b>	+17%
Israel	184	191	<b>190</b>	0%
Serbia	13	42	<b>57</b>	+36%
Tunisia	1 000	947	<b>850</b>	-10%
Turkey	2 700	2 200	<b>2 450</b>	+11%
Ukraine	550	470	<b>550</b>	+17%
<b>TOTAL non EU</b>	<b>6 471</b>	<b>6 430</b>	<b>6 997</b>	+9%
<b>TOTAL AMITOM</b>	<b>17 188</b>	<b>16 830</b>	<b>17 544</b>	+4%



## EU policy main dossiers that impact on the tomato industry

### ETS & CBAM

- ETS free allowances phased out 2026–2034, raising energy, glass and metal-can costs.
- CBAM (definitive from 2026) prices carbon on fertiliser, steel and aluminium imports.

### Tariffs & international trade agreements

- EU–Mercosur provisional from May 2026: new export openings but more South-American competition for other agri-commodities.
- US tariffs are a headwind on the largest extra-EU market, and a swinging euro/dollar rate can change EU price competitiveness there quickly.

### PPWR

- Reg. (EU) 2025/40 applies from 12 Aug 2026: recyclability, recycled content, PFAS limits, labelling.
- Expanded EPR and recyclability-based fees raise packaging compliance costs.

### EU agricultural policy revision (CAP post-2027)

- 2028–2034 proposal merges the two pillars into a single fund (~€865 bn); more flexibility to Member States.
- Parliament demands a ring-fenced, standalone CAP budget; income-support outcome still uncertain.

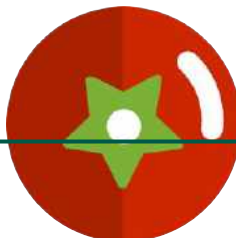
### NGT (New Genomic Techniques)

- Draft EU regulation in final adoption (Council Apr 2026; Parliament vote 2026); ~2-year implementation.
- Two tiers: NGT-1 treated as conventional (no product label); NGT-2 stays under GMO rules.

Could speed disease-/drought-tolerant, higher-quality varieties with lower inputs.

### EU is a mature market with declining demography

- Saturated EU demand and an ageing population cap volume growth.
- Growth depends on premiumisation, exports and stock discipline



# AMITOM member countries

Crop results 2024–2025 and 2026 forecasts



# Italy



## Full member · European Union

Represented by ANICAV (private) & Confcooperative (co-operatives)

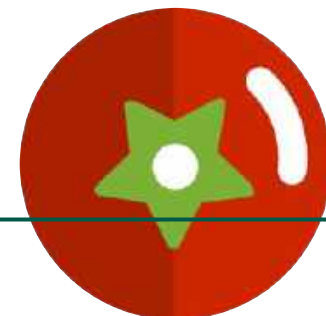
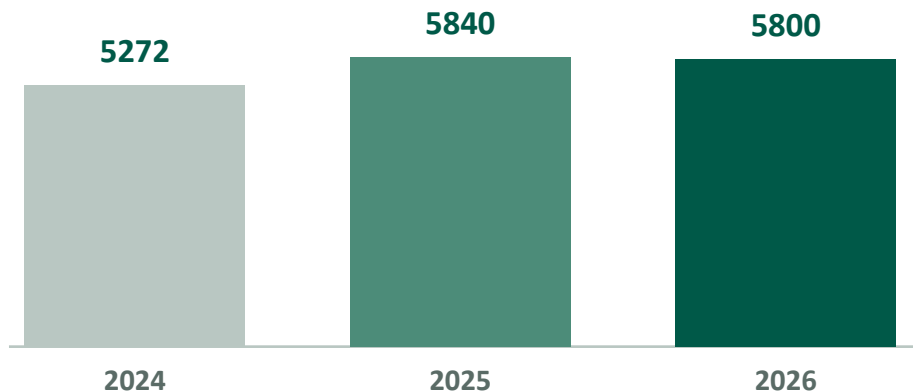
**Field yield** North 69 · South 81 MT/ha (2025)

**Field-gate price** North €143/MT · South €150/MT round, €160/MT long (2025)

**0%**  
2026 vs 2025



Crop for processing (thousand t)





# Italy – 2026 season



**Ex-field price** North €137/t · South to be agreed for 2026 - in 2025 crop €150/t (round), €160/t (long shaped)

## In the fields

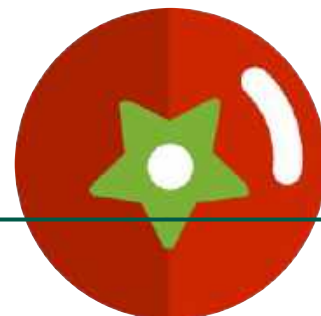
- 2025 crop ~5.84 Mt (North 3.12 Mt, Centre-South 2.72 Mt); 2026 crop expected stable or increased under favorable agronomic and climatic conditions.
- Good water availability in both areas (North and South)
- Price agreement for 2026 crop achieved in Northern Italy (137 Euro/T ex filed) while to be agreed in next coming weeks in Southern Italy
- Farmers claim for increased costs for their inputs (fertilizers, agrochemicals, fuel, plastic for drip irrigation).

## In the factory

- Increased costs for energy, packaging, transport and wages.
- Low carry over compared to other EU countries due to the short crop 2024 and 2025 in balance.
- Large investment made by the processor companies for modernization, decarbonization and environmental-target investments (renewable energy)
- Ongoing M&A is reshaping the Italian industry, simplifying and polarising it into specialised groups focused on distinct reference markets.

## In the markets

- 2025 tomato exports resilient: (Volumes -1.2%); value €3.245 M
- Italian export unit value average -4.6% (1.39 → 1.33 €/kg) vs -7.8% EU average.
- US resilient despite tariffs: volume -2.3%, unit value -2.5%.
- Low-cost extra-EU imports collapsed (China -77% value); supply shifting to EU origins,
- Made-in-Italy premium market increase in different non-EU markets.





# Spain



## Full member · European Union

Represented by AGRUCON – Spanish Association of Vegetable Processors

**Field yield** 82 MT/ha (2025)

**Field-gate price** €107/MT (2025)

**+14%**

2026 vs 2025

2024 – Final

**3080**

thousand t

2025 – Final

**2410**

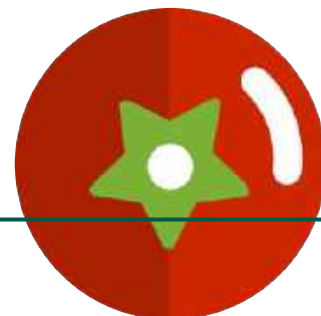
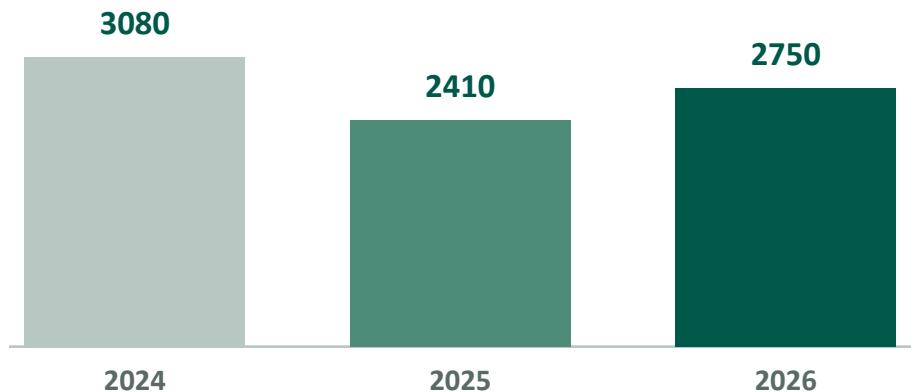
thousand t

2026 – Forecast

**2750**

thousand t

Crop for processing (thousand t)





# Spain – 2026 season



**Ex-field price** ~€107/t (2025 & 2026).

## In the fields

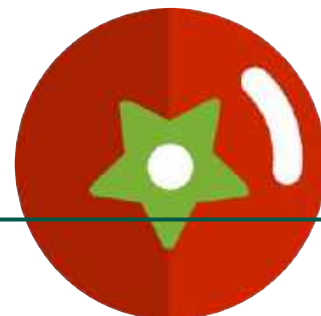
- More extreme weather (heat, drought, intense rain, hail) raising yield variability.
- Fewer approved crop-protection tools under EU rules.
- Focus on water-use efficiency; supply not a short-term limit.
- Labour shortage offset by fast mechanisation (auto-transplanters, weeding robots, autonomous tractors on trial).
- Growing precision-ag adoption (remote sensing, AI, automation).
- Land competition from almonds, pistachios and olives.

## In the factory

- Decarbonisation and environmental-target investment costs.
- Packaging-waste, recycling and EPR regulatory burden.
- Need for energy-efficiency, renewables and water-reuse investment.
- Hard to attract seasonal industrial labour.
- Packaging cost and availability still a concern.

## In the markets

- Competition from non-EU processors under lighter regulation.
- Trade-policy, tariff and market-access uncertainty.
- Rising sustainability, traceability and ESG requirements.
- Strong retail and foodservice price pressure.
- Volatility linked to global inventory levels.
- Growing demand for traceable, sustainable products.





# Portugal



## Full member · European Union

Represented by AIT – Portuguese tomato processing association

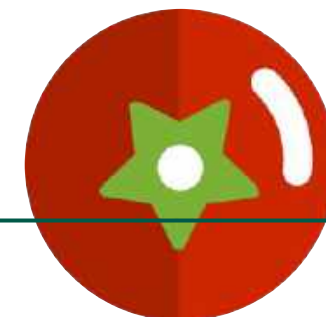
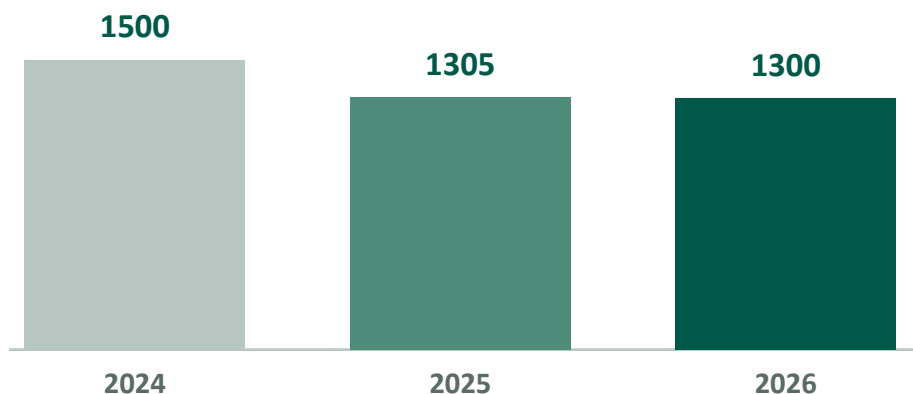
**Field yield** 95 MT/ha (2025)

**Field-gate price** €115/MT (2025)

**0%**  
2026 vs 2025



Crop for processing (thousand t)





# Portugal – 2026 season



**Ex-field price** ~€115/t (2025); cost pressures persist into 2026, with the main impact on prices expected in 2027.

## In the fields

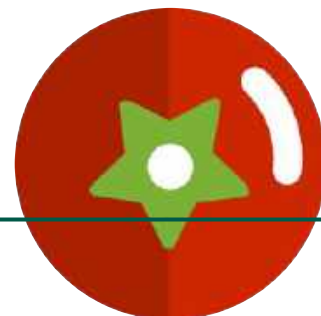
- More extreme weather: heavy rain and flooding now a key risk; fields need better organisation and protection.
- National authorities have begun addressing field-edge protection after this winter's floods.
- Pest & disease pressure rising under EU limits on fertilisers and crop-protection alternatives.
- Labour a growing constraint over the last 5 years – sharper in the last 3.
- Energy-driven fertiliser costs keep pressure on agreed fresh-tomato prices; full impact expected in 2027.

## In the factory

- EU policies concerns, common to all EU countries: Decarbonisation, packaging-recycling and fertiliser-limit deadlines need review
- EU sustainability agenda seen as out of step with current conflicts.
- Energy-cost differences between countries; labour availability harder since 2022.
- Risk of a shrinking EU industry and dependence on third countries with cheaper energy, fertilisers and zero tariffs.

## In the markets

- Inventory levels remain the buyers' key barometer, especially after the high 2022–2024 prices.
- Tariffs and trade policy challenging EU tomato products
- EU food safety more reliable, underpinned by grower and industry investment in regenerative agriculture.
- Compulsory certifications secure brand and private-label trust with consumers.





# Greece



## Full member · European Union

Represented by PEK – Greek Canners Association (founding member, 1945)

**Field yield** 100 MT/ha (2025)

**Field-gate price** €115/MT (2025)

**-13%**

2026 vs 2025

2024 – Final

**510**

thousand t

2025 – Final

**515**

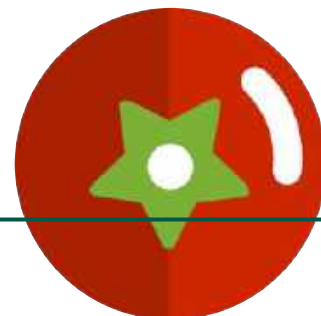
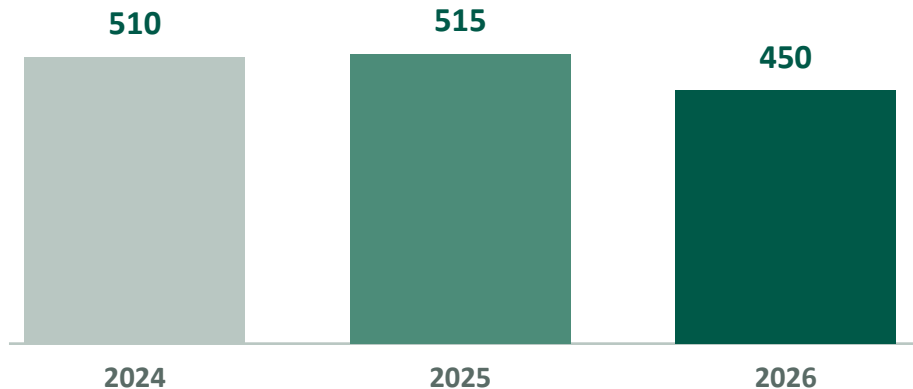
thousand t

2026 – Forecast

**450**

thousand t

Crop for processing (thousand t)





# Greece – 2026 season



**Ex-field price** ~€115/t (2025) → ~€105/t (2026); no interprofessional agreement, so prices vary by area.

## In the fields

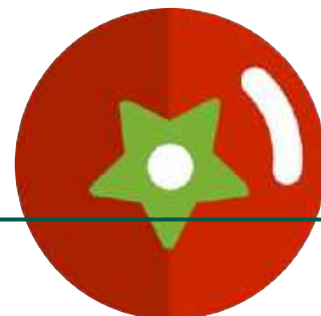
- Fully mechanised, with 95%+ drip irrigation.
- Climate change: torrential rains and dry spells threaten future water.
- Fields smaller than the EU average, but consolidating fast.
- Key threat: red spider mite (*Aculops lycopersici*) with EU restrictions on agrochemicals allowed.
- Rising broomrape (*orobanche*) in some areas.

## In the factory

- Energy costs – the highest in the EU for the past two years.
- Labour availability is a constraint.

## In the markets

- Distance from major EU markets raises transport costs.
- Stock levels are very low.
- EU-wide concern over competition from non-EU producers without EU regulatory burden.





# France



## Full member · European Union

Represented by SONITO – National Interprofessional Tomato Society

**Field yield** 77 MT/ha (2025)

**Field-gate price** €123/MT (2025)

**-19%**

2026 vs 2025

2024 – Final

**168**

thousand t

2025 – Final

**186**

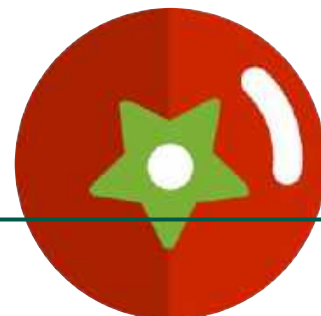
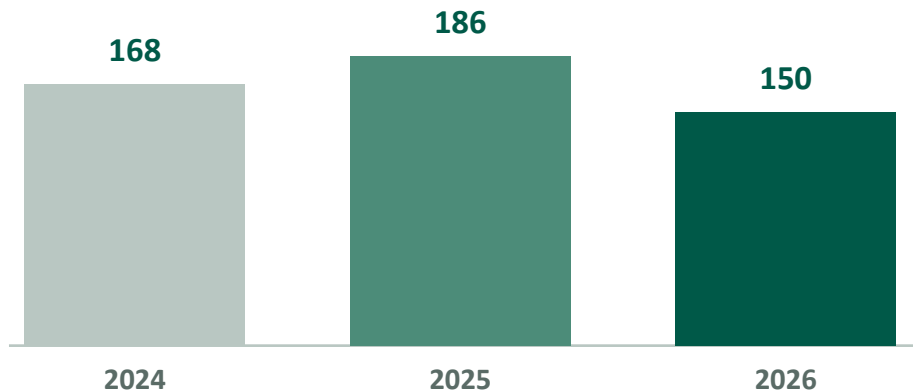
thousand t

2026 – Forecast

**150**

thousand t

Crop for processing (thousand t)





# France – 2026 season



**Ex-field price** conventional ~€105–120/t (weighted avg ~€110); organic ~€200/t.

## In the fields

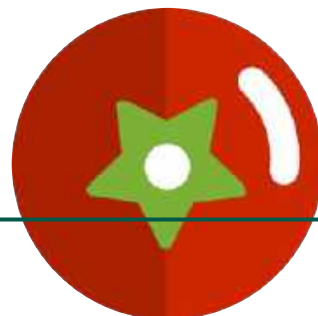
- Increasingly erratic climate – heat, rain, hail, extreme May swings.
- Water availability is not a real issue where tomatoes are grown.
- Pest & disease pressure is the top problem: fewer and less-effective approved actives.
- Rising input costs; high but expensive mechanisation.

## In the factory

- Energy & packaging the main pressure: ~+3–4% on the 2025 cost price.
- Labour tight for specialised tasks (maintenance, assembly, crimping).
- Environmental regulation (e.g. on water) constrains development.

## In the markets

- Subject to European/global prices – France imports ~90% of consumption.
- Growing push to label products grown, prepared & packed in France.





# Hungary



## Associate member · European Union

Represented by UNIVER (associate company)

**Field yield** 97 MT/ha (2025)

**Field-gate price** €130/MT (2025)

**-28%**

2026 vs 2025

2024 – Final

**120**

thousand t

2025 – Final

**97**

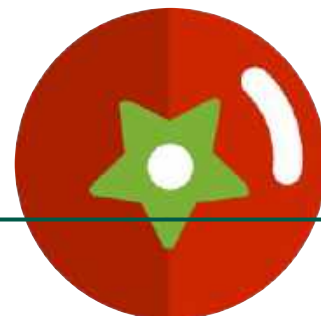
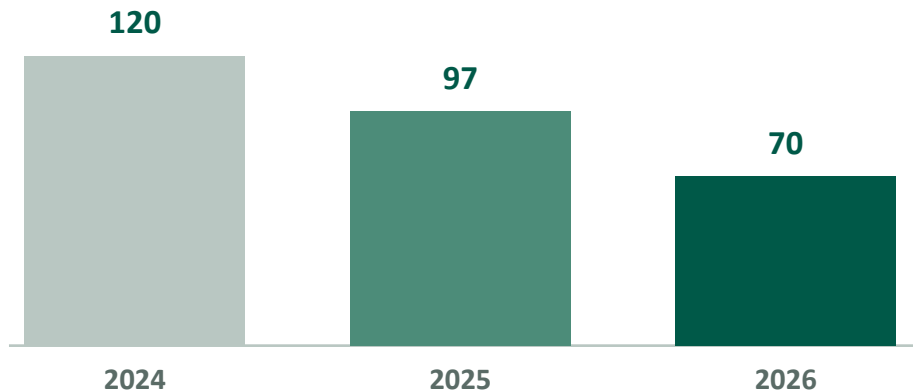
thousand t

2026 – Forecast

**70**

thousand t

Crop for processing (thousand t)





# Hungary – 2026 season



**Ex-field price** €135/t (2024) → €130/t (2025) → €125–130/t (2026).

## In the fields

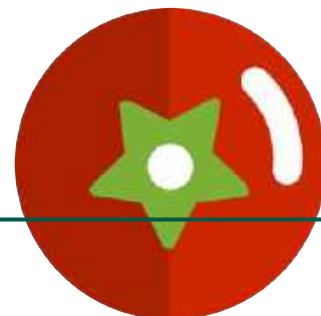
- Weather extremes; sharply lower, poorly distributed rainfall (drought then intense rain).
- Rising water, energy, labour and input costs.
- Need for more technology and investment.

## In the factory

- Energy, packaging (plastics) and labour costs pressuring processors.
- Improving efficiency is increasingly important.

## In the markets

- High stock levels and global price pressure.
- Rapid HUF appreciation makes planning and profitability difficult.





# Bulgaria



## Full member · European Union

Represented by ATBPF – Association of Traditional Bulgarian Preserved Foods

**Field yield** 60 MT/ha (2024)

**Field-gate price** €118/MT (2024)

**-50%**

2026 vs 2025

2024 – Final

**60**

thousand t

2025 – Final

**40**

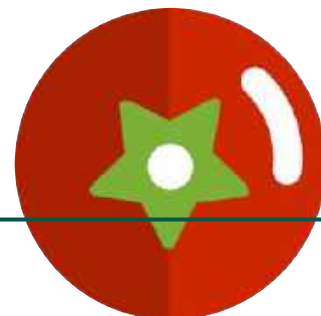
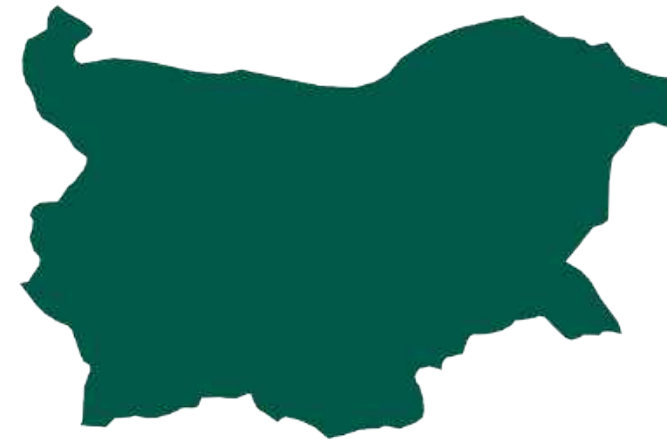
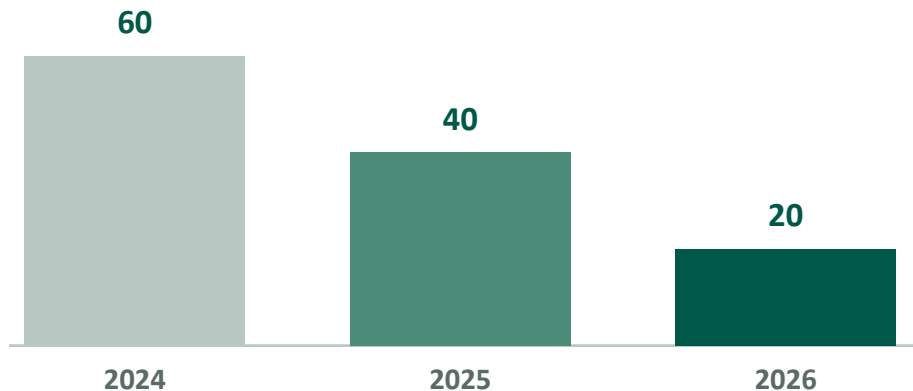
thousand t

2026 – Forecast

**20**

thousand t

Crop for processing (thousand t)





# Turkey



## Full member · Non-EU Mediterranean

Represented by SALKONDER – Turkish Tomato Paste Exporters & Producers Assoc.

**Field yield** 67 MT/ha (2025)

**Field-gate price** €100/MT (2025)

**+11%**

2026 vs 2025

2024 – Final

**2700**

thousand t

2025 – Final

**2200**

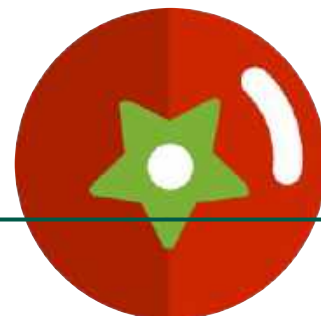
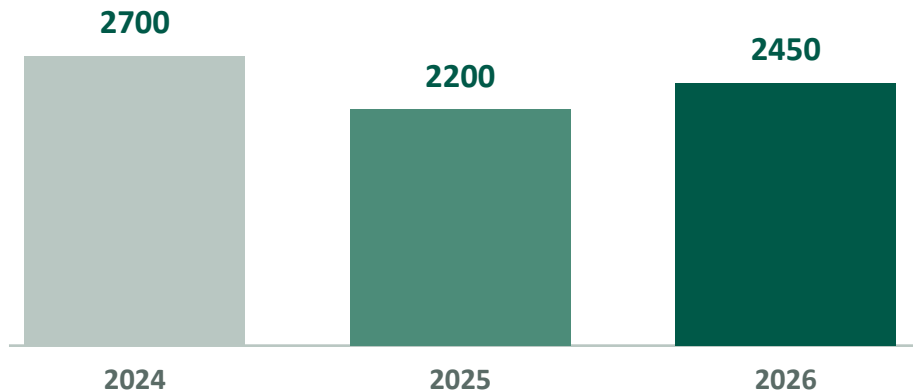
thousand t

2026 – Forecast

**2450**

thousand t

Crop for processing (thousand t)





# Turkey – 2026 season



**Ex-field price** ₺4.00/kg **US\$101/t** (2025) → ₺4.90/kg **US\$107/t** (2026), ex-field. Turkish lira depreciated ~16% against the dollar over the same period.

## In the fields

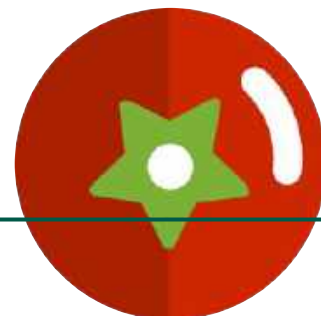
- Climate issues in line with other European producers.
- Later, more bunched planting (hot/cold) → fewer working days.
- Water available, but wells getting deeper and lower quality → lower yields.
- Pests and disease manageable; input costs (fertiliser, fuel) up due to war.

## In the factory

- Energy & packaging in line with Europe.
- Labour increasingly scarce and less competitive as youth move to cities.

## In the markets

- Global stocks and prices similar to other countries.
- Key markets heavily protected (Chile/Egypt have trade deals; Turkey faces tariffs).
- Main export markets Iraq & Syria; large, growing domestic consumption.
- Traditionally paste-heavy, shifting toward lower-brix products.





# Tunisia



## Full member · Non-EU Mediterranean

Represented by GICA – Food Processing Industries Association (1965)

**Field yield** 68 MT/ha (2025)

**Field-gate price** €81/MT (2024)

**-10%**

2026 vs 2025

2024 – Final

**1000**

thousand t

2025 – Final

**947**

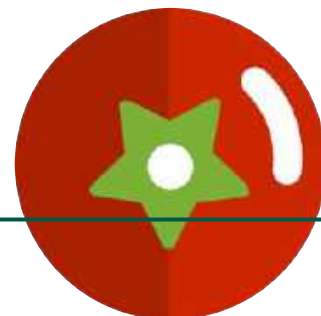
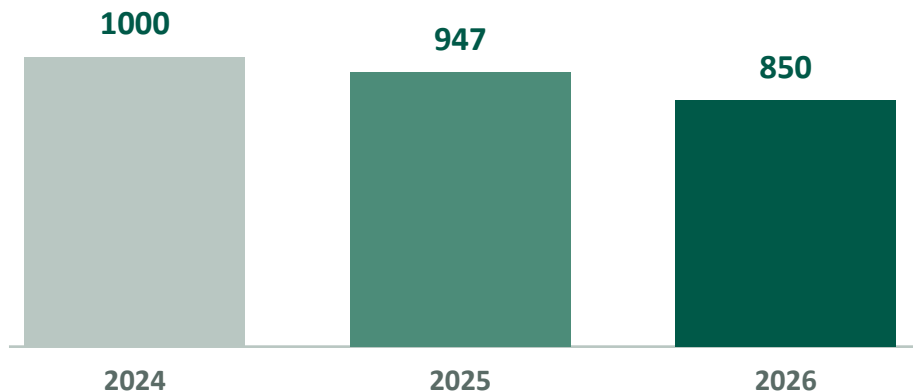
thousand t

2026 – Forecast

**850**

thousand t

Crop for processing (thousand t)





# Tunisia – 2026 season



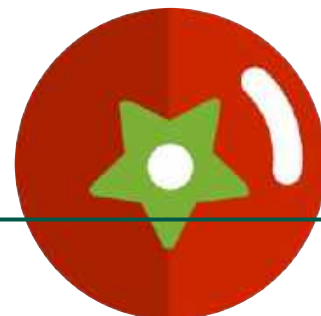
*Not data available for tomato field price crop 2026*

## In the fields

- Reduced surfaces in 2026
- High costs for farmers and lack of manpower
- Delay due to rain in the spring

## In the markets

- High level of stock of paste at 30 to 40 thousand tons





# Ukraine

## Associate member

Represented by INAGRO (associate company)

**Field yield** 84 MT/ha (2024)

**Field-gate price** €110/MT (2025)

**+17%**

2026 vs 2025

2024 – Final

**550**

thousand t

2025 – Final

**470**

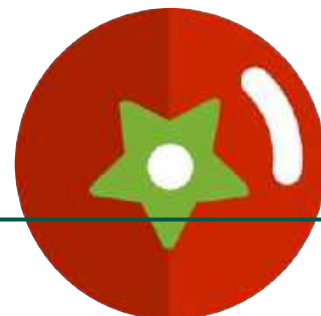
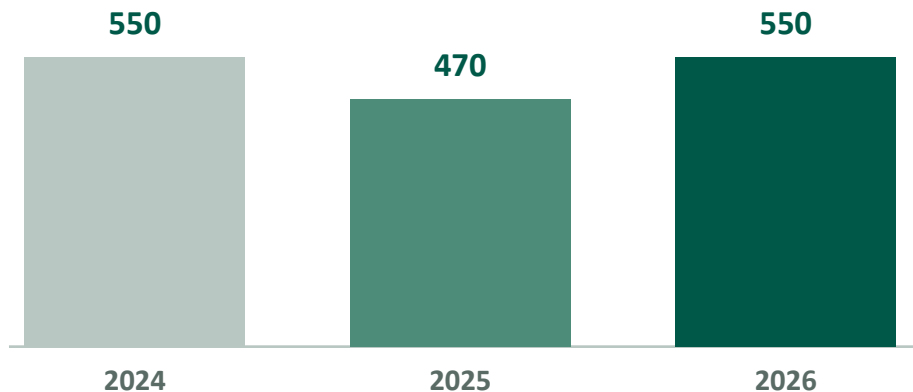
thousand t

2026 – Forecast

**550**

thousand t

Crop for processing (thousand t)





# Ukraine



**Ex-field price** US\$110/t ex-field. Same as last year

## In the fields

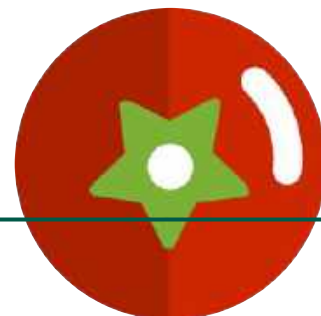
- Transplanting is 10 days beyond the schedule because cold and rainy weather in May.
- Early variety and middle variety will overlap in ripening
- Some frost without dramatic effects at the beginning of the season
- Bacteriosis started because of rain
- Water, fertilizers and other inputs available but with increased costs.

## In the factory

- Same condition as they were.
- Main concern is oil & gas prices
- Lack of qualified engineers because most of them recruited in the army

## In the markets

- All open at this stage
- Biggest challenge is to bring the product out of the Country without damages because logistic is difficult due to the war
- Main markets are: Ukraine. Eastern and northern EU countries, Middle East.
- Higher cost for transport and logistic





# Egypt



## Associate member

Represented by PASTE & JUICE (associate company)

**Field yield** 88 MT/ha (2025)

**Field-gate price** €95/MT (2025)

**+3%**

2026 vs 2025

2024 – Final

**624**

thousand t

2025 – Final

**780**

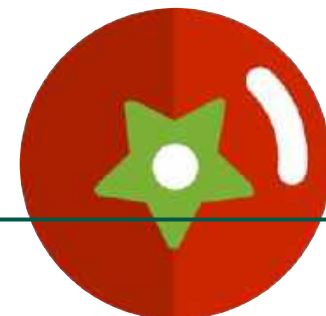
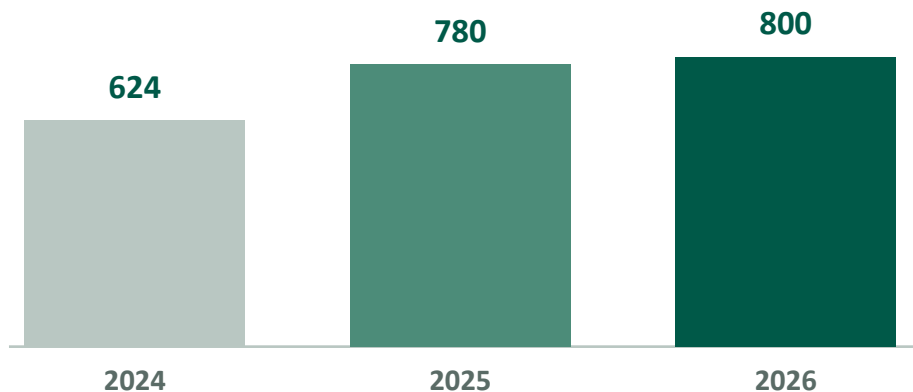
thousand t

2026 – Forecast

**800**

thousand t

Crop for processing (thousand t)





# Egypt – 2026 season



**Ex-field price** ~\$110/t (2025) → ~\$115/t (2026), with upside risk as agricultural input costs rise.

## In the fields

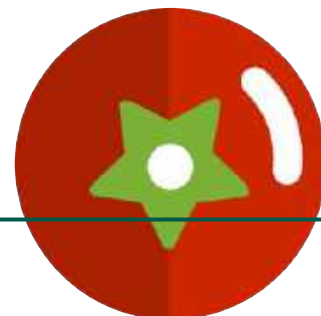
- High summer temperatures are a real threat to the crop.
- Fertiliser and pest-control input costs are pushing raw-material prices up.

## In the factory

- Energy costs up ~25% and packaging ~30% since the onset of regional conflict.

## In the markets

- Fair competition needs to be maintained in export markets.





# Iran

## Associate member

Represented by ILKIN (associate company)

Field yield n/a

Field-gate price €90/MT (2024)

**+17%**

2026 vs 2025

2024 – Final

**1400**

thousand t

2025 – Final

**1800**

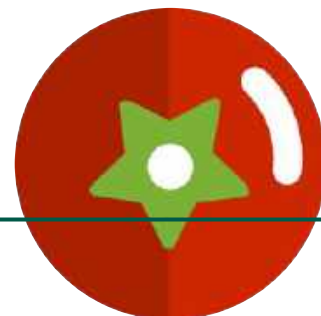
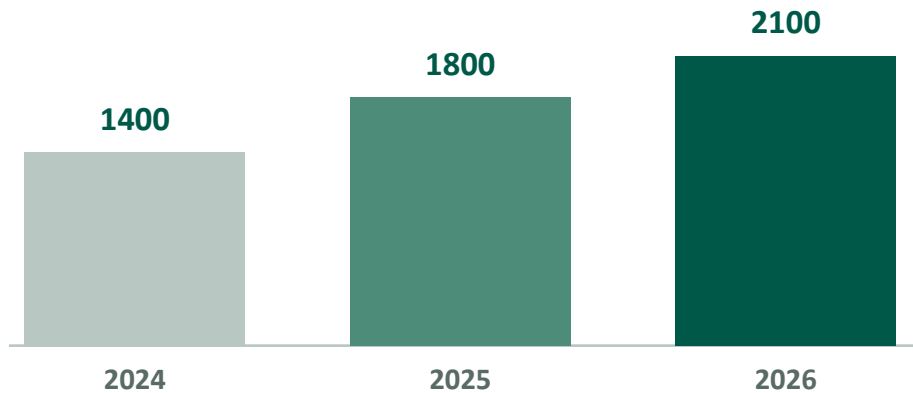
thousand t

2026 – Forecast

**2100**

thousand t

Crop for processing (thousand t)





# Iran – 2026 season



**2026 forecast** ~2.1 Mt for processing, up from 1.8 Mt in 2025. *(based on Hamed Vosoughi's latest report)*

## In the fields

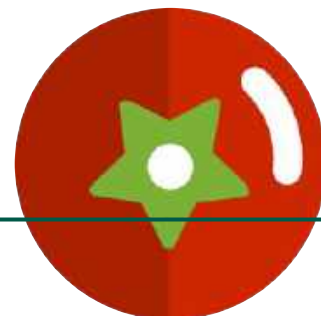
- Stronger 2026 harvest expected : ~2.1 Mt, up from 1.8 Mt in 2025.
- Favourable growing conditions reported in early assessments.
- Good rain and water over recent months working in farmers' favour.

## In the factory

- Increased raw-material availability expected for processors.
- Problems for electric energy supply and black out
- High inflation rate

## In the markets

- Outlook still uncertain amid ongoing regional developments.
- Reliable market intelligence remains hard to obtain.
- Internet and communication disruptions sharply reduce timely information from growers and processors.
- Crop estimates and market conditions to be monitored closely through the season.





# Serbia

## Associate member

Represented by Polimark (associate company)

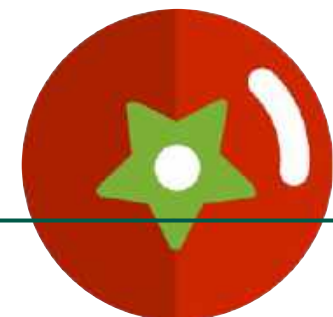
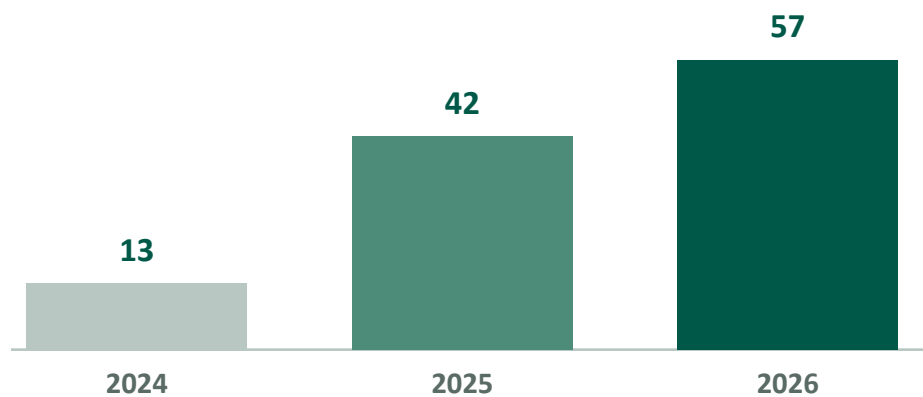
**Field yield** 75 MT/ha (2025)

**Field-gate price** €119/MT (2024)

**+36%**  
2026 vs 2025



Crop for processing (thousand t)





# Israel



## Full member · Non-EU Mediterranean

Represented by TPB – Tomato Products Board of Israel

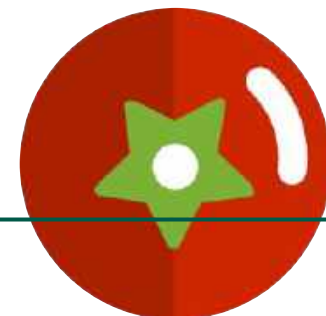
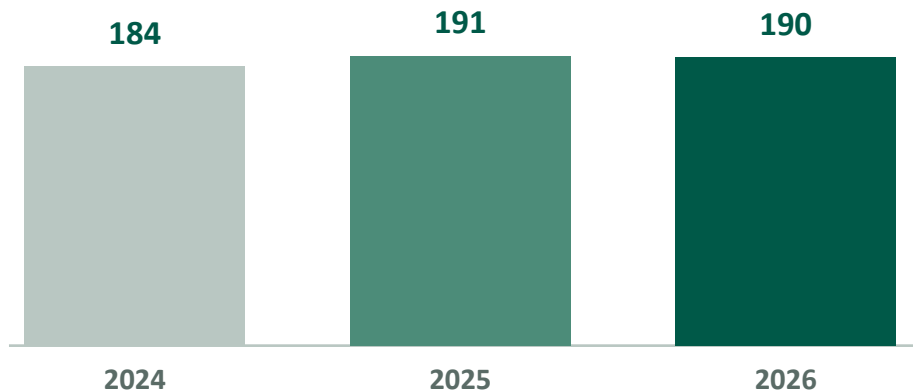
**Field yield** 100 MT/ha (2025)

**Field-gate price** €121/MT (2025)

**0%**  
2026 vs 2025



Crop for processing (thousand t)





# Syria



## Associate member

Represented by RABBATH FOOD (associate company)

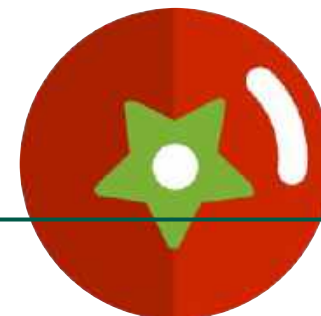
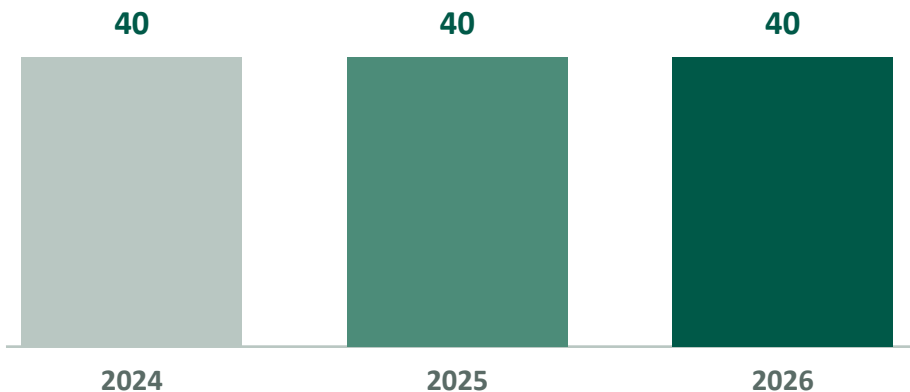
**Field yield** n/a

**Field-gate price** n/a

**0%**  
2026 vs 2025



Crop for processing (thousand t)





## Associate member · European Union

Represented by MAGRO BROTHERS (associate company)

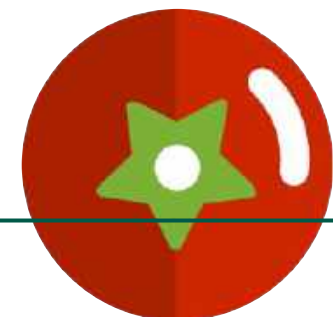
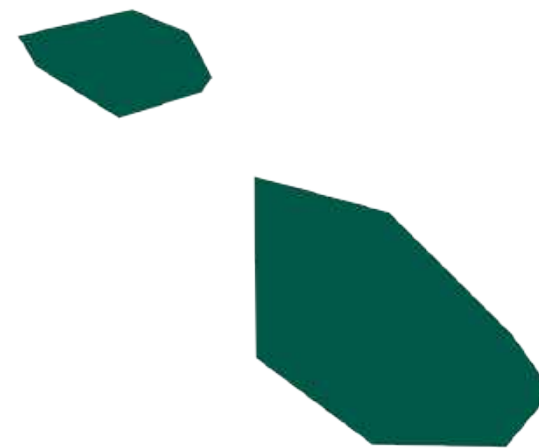
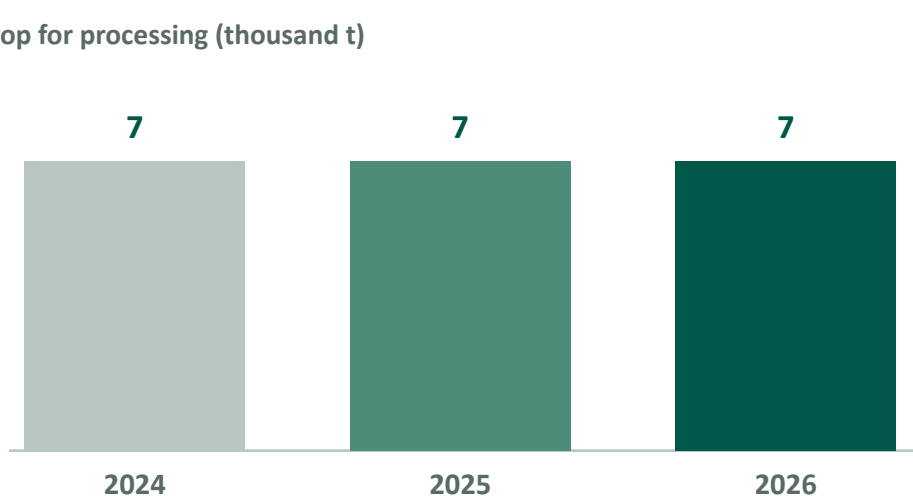
**Field yield** n/a

**Field-gate price** n/a

**0%**  
2026 vs 2025



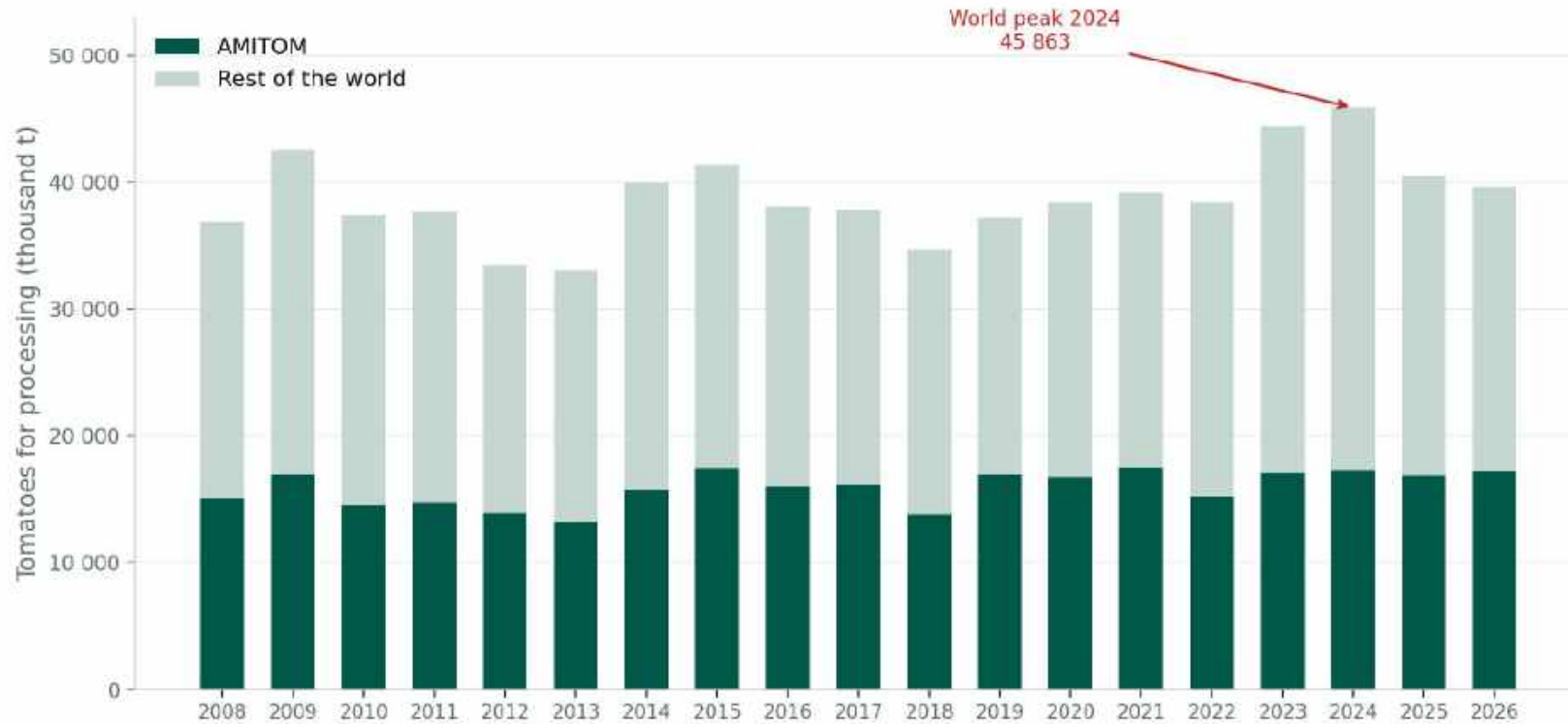
Crop for processing (thousand t)



# AMITOM in the global context

Comparative dynamics of AMITOM vs. world production, 2008–2026

# AMITOM vs. the rest of the world



## Key takeaways

- AMITOM output is remarkably stable ( $\approx 16\text{--}17$  Mt) year to year.
- World production is far more volatile and grew strongly in 2023–2024.
- The 2024 world peak (45.9 Mt) was driven by non-AMITOM origins, notably China and California.
- World volumes fell back in 2025–2026 toward the long-run norm.

Source: WPTC production database

# AMITOM share of world production



Source: WPTC production database

## Key takeaways

- AMITOM has supplied ≈38–45% of world processing tomatoes since 2008.
- The share fell to a 2024 low of 37.6% as the rest of the world surged.
- With the 2025–2026 global contraction, AMITOM's share recovers to ~43%.
- Stability makes AMITOM a structural anchor of global supply.

# AMITOM field yield & field-gate price (2015–2025)



### Average field yield (MT/ha)



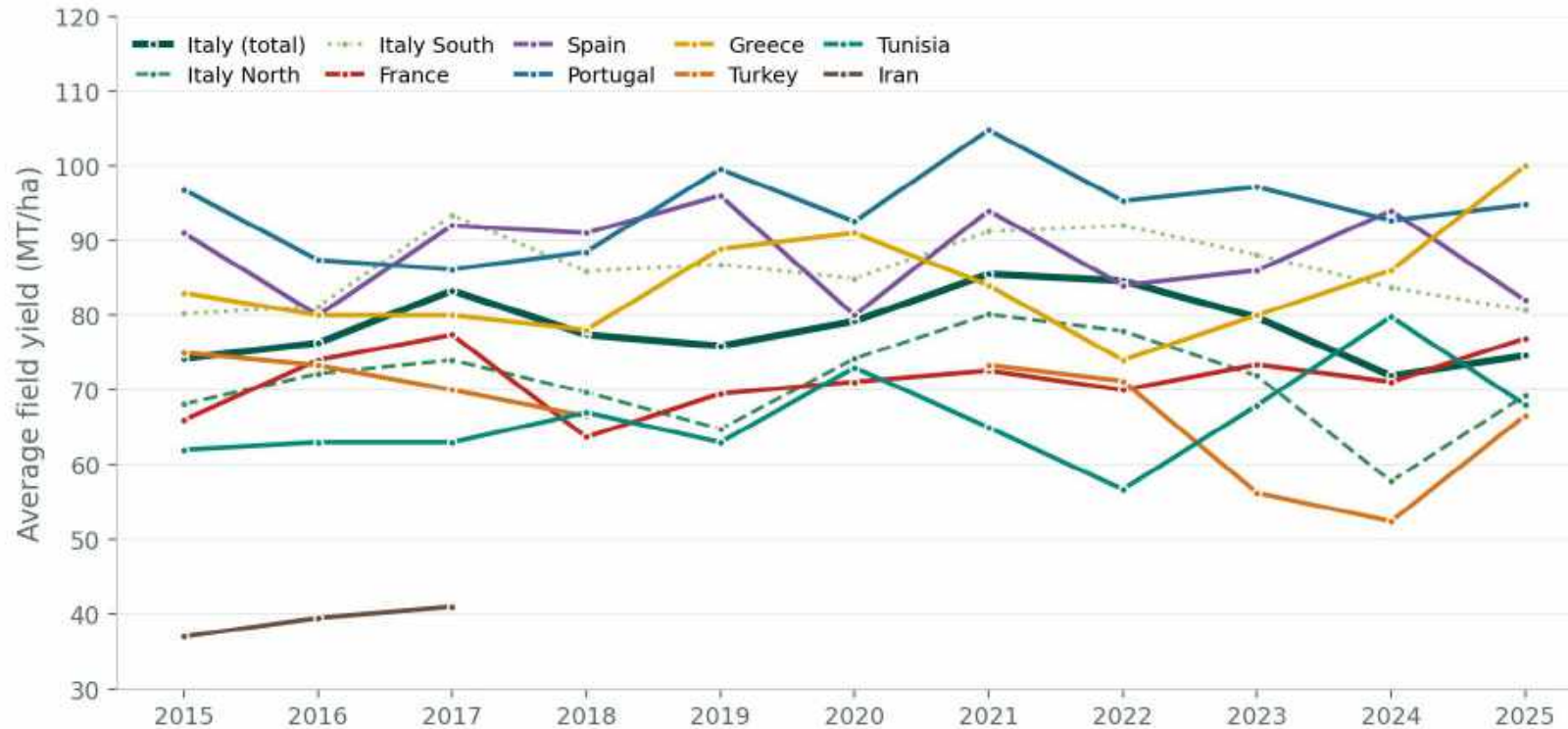
### Field gate price (€/MT)



**Yields hold around 75–87 MT/ha**, peaking in 2021; recent weather has eased them back. **Field-gate prices jumped** from ~€85/MT (2021) to a €136/MT peak (2023) on energy and input inflation, easing to ~€125/MT in 2025.

Source: WPTC production database.

# Field yield by country (2015–2025)



## Key takeaways

- Portugal leads; Spain and Greece also high (up to  $\approx 100$  MT/ha in 2025).
- Italy's  $\approx 75$  MT/ha national average masks with high yield in South and lower in North
- Turkey and Tunisia run lower ( $\approx 55$ – $80$  MT/ha).

Source: WPTC production database.

# Field-gate price by country (2015–2025)



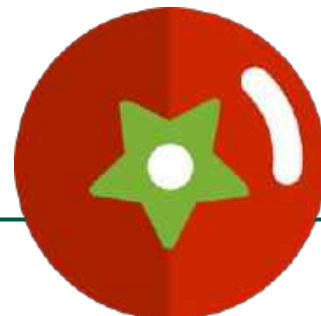
## Key takeaways

- Prices jumped sharply from 2021 to 2023 on energy and input inflation post Covid-19.
- The downward price repositioning followed different dynamics across countries but did not return to pre-COVID levels.
- Rising production input costs during 2026 could trigger a trend reversal in tomato prices for 2027.

Source: WPTC production database.

# Concluding remarks

- **Amitom remains the dominant region at world level** with more than 40% of the total world production and with 5 countries in the top ten (Italy, Spain, Turkey, Iran and Portugal: Amitom output show a more stable production compared the world cycle, but with different dynamics within members (Italy had the lowest production in 2024 when world production achieved the pick)
- **3 Amitom countries are in a war situation** (Ukraine, Iran, Israel) with high level of uncertainty
- **Increasing input cost for farmers and processors happened after Covid in 2020 and is reshaping the landscape of the industry also in 2026 crop** (fuel, fertilizers, agrochemicals in the fields and gas, electric energy, packaging and transport for processors) are impacting heavily the tomato industry in Amitom countries.
- **Climate change and Water availability** are the main challenges for most of the Amitom countries that in the last 5 year faced very different and opposite situation in many different countries
- **EU policy & international trade agreements:** tightening EU rules (ETS/CBAM carbon costs, PPWR packaging compliance, CAP reform, NGT framework) raise costs and reshape competitiveness, while trade developments — the EU–Mercosur agreement and an unfavourable US tariff environment — open some markets but expose Amitom producers to greater external competition.



# Thank you for your attention



**Italiano** Grazie per la vostra attenzione

**Français** Merci pour votre attention

**Español** Gracias por su atención

**Português** Obrigado pela vossa atenção

**Ελληνικά** Σας ευχαριστώ για την προσοχή σας

**Magyar** Köszönöm a figyelmüket

**Български** Благодаря за вниманието

**Srpski** Хвала на пажњи

**Türkçe** İlginiz için teşekkür ederim

**Українська** Дякую за увагу

**العربية** شكرًا لاهتمامكم

**فارسی** از توجه شما متشکرم

**עברית** תודה על תשומת לבכם

