

Crop Results and 2026 Forecasts North America

Mark De La Mater
The Morning Star Company
Presented at the 2026 World Processing Tomato Congress
June 8, 2026



June 1, 2026

Agenda

1. Data Sources
2. Units of Measure
3. North America Production
4. California Production
5. Summary

Data Sources

1. Publicly Available Sources

- California League of Food Producers
- California Tomato Growers Association
- Ontario Processing Vegetable Growers Association
- World Processing Tomato Council
- USDA Risk Management Agency
- USDA National Agricultural Statistics Service

3. Regional Subject Matter Experts

- Travis Glick (Hirzel Canning Company)
- Ken Martin (Fermano Foods)
- Angela Reimneitz (OPVG)
- Curt Utterback (Red Gold, Inc.)

Units of Measure

- For this presentation, *the Default Measurement System is the International System (“SI”)*

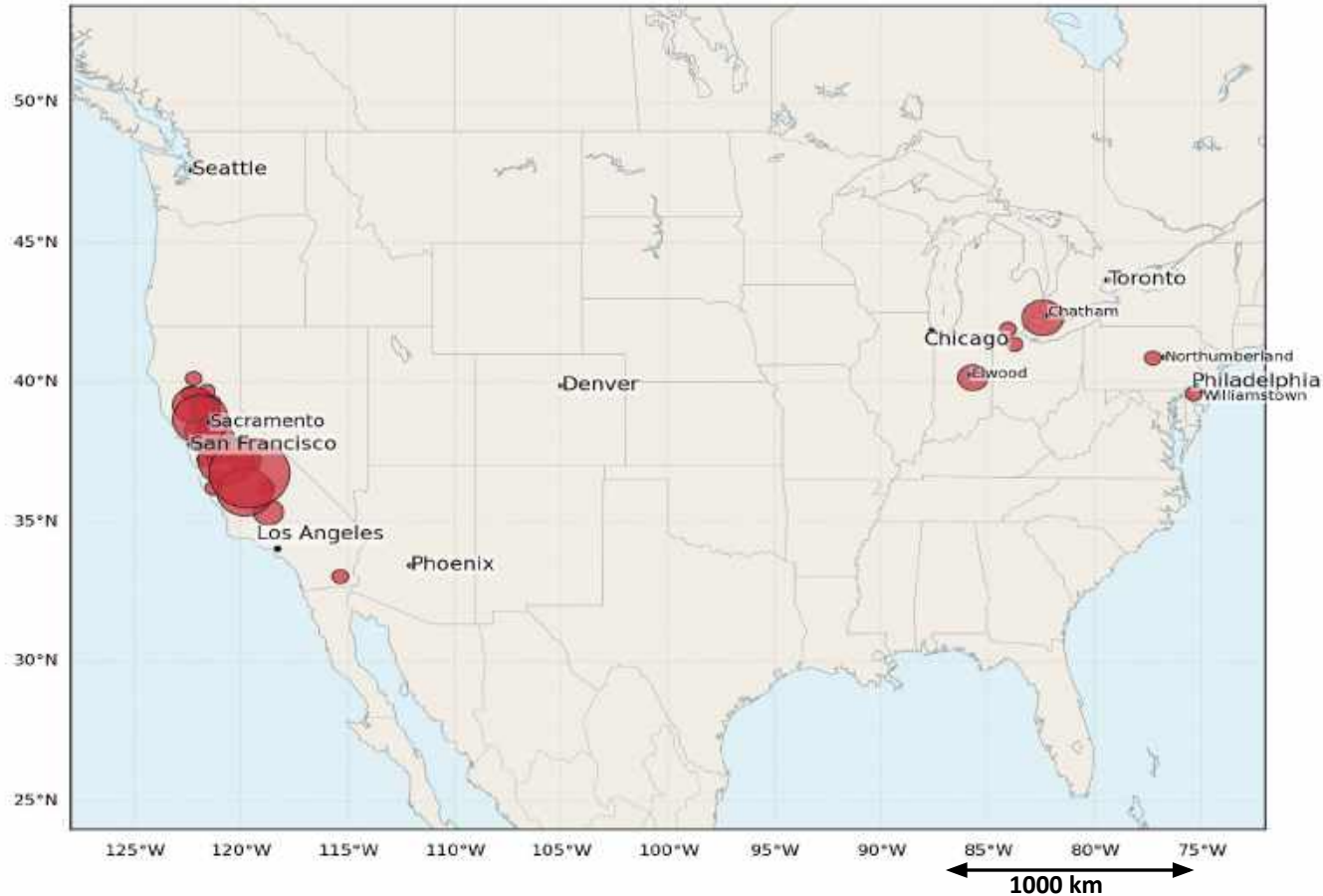
Metric	International System (“SI”)	U.S. Customary System (U.S.)
Weight	Metric Ton	Short Ton
Area	Hectare	Acre
Distance	Kilometer	Mile
Yield	Metric Tons / Hectare	Short Tons / Acre
Price	USD / Metric Ton	USD / Short Ton

- Delivered Weights are all presented in Thousands of Metric Tons*

NORTH AMERICA

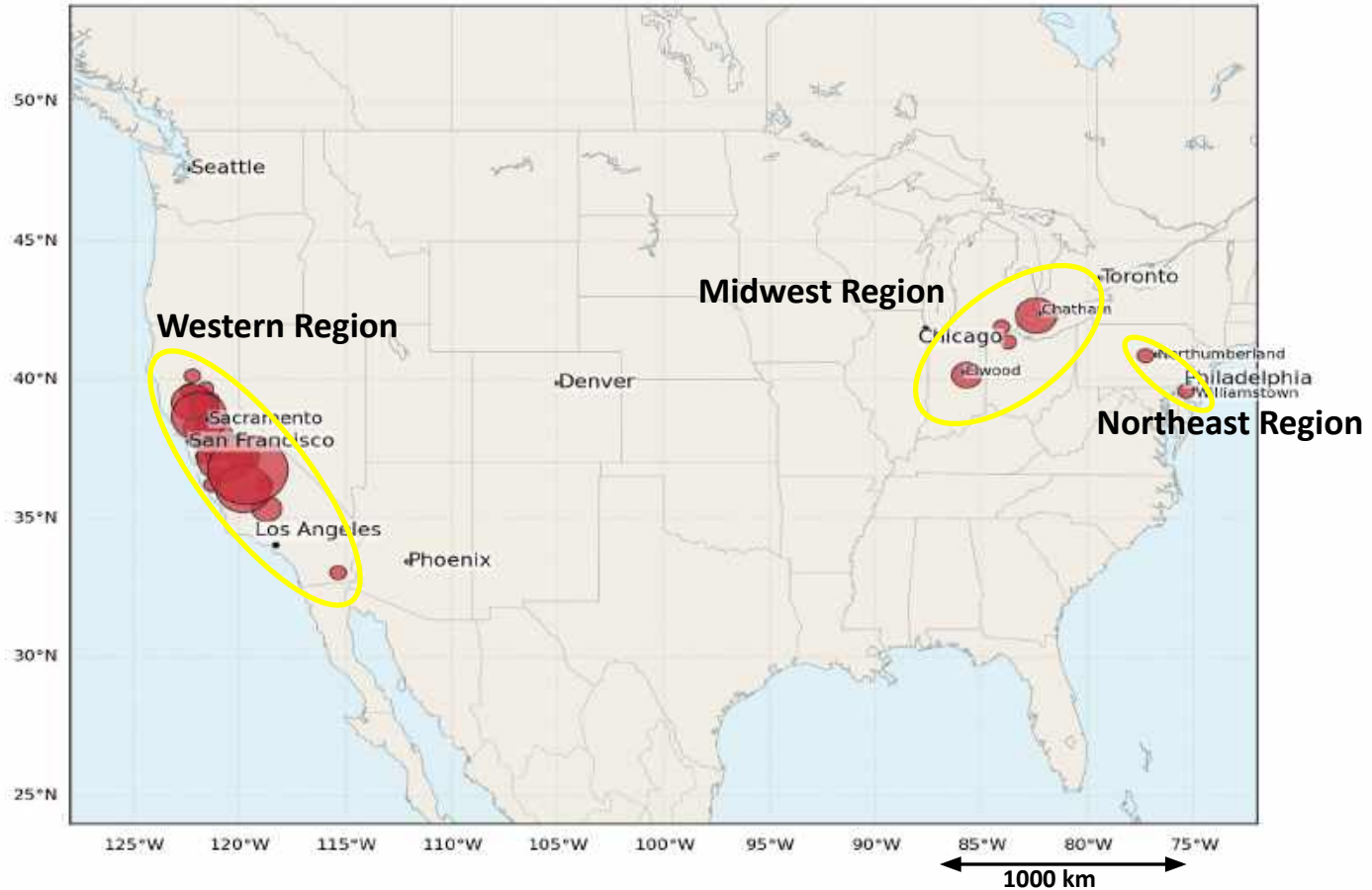


Processing Tomato Growing Regions in North America



Marker area scaled to metric tons.

Processing Tomato Growing Regions in North America



Marker area scaled to metric tons.

North America: Midwest Region

2026 Crop Estimate

Planted Area	Delivered Weight (in 000s)	Average Yield	Average Price
10,000	912	91	\$136

Primary Regional Processors:

- Red Gold, Inc. (Elwood, IN)
- Highbury Canco (Leamington, ON)
- Sun-Brite Foods (Ruthven, ON)
- Conagra Brands Canada (Dresden, ON)
- Hirzel Canning Co. (Northwood, OH)

Processing Tomato Growing Regions in the Midwest and Ontario

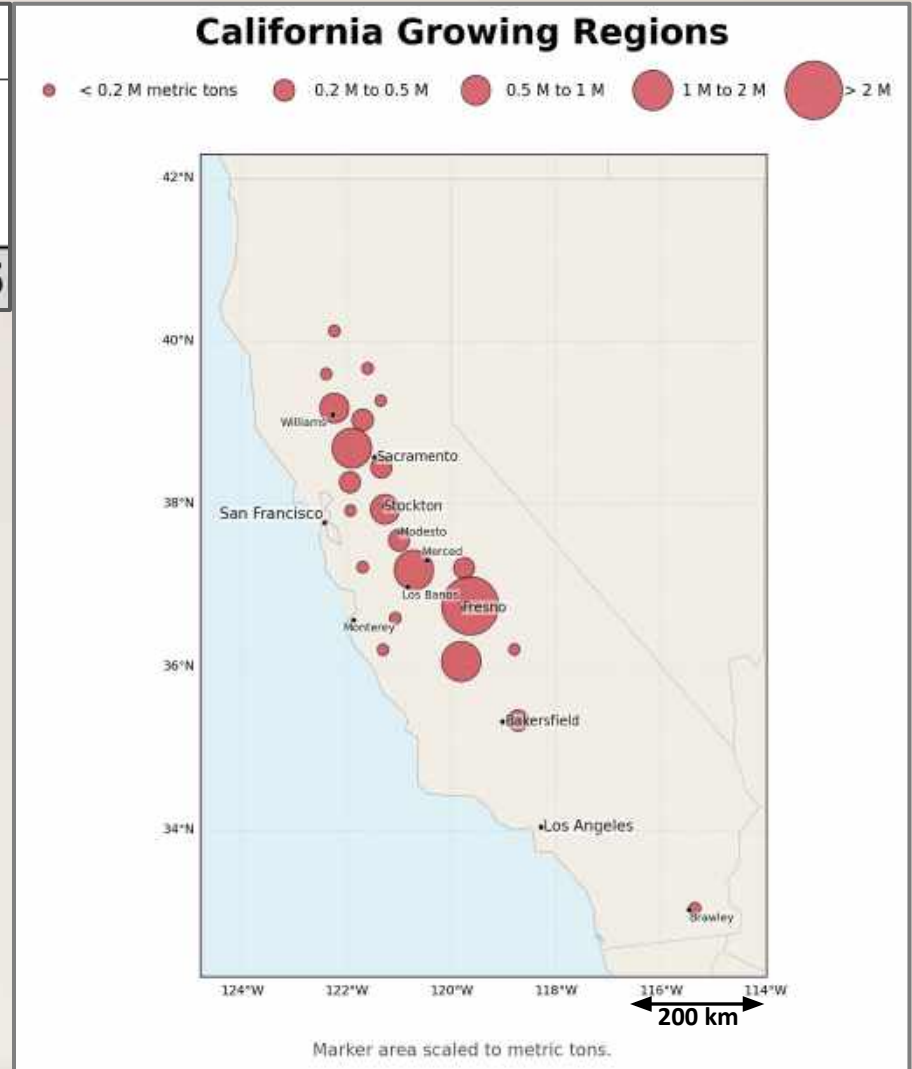


North America: Western Region

2026 Crop Estimate			
Planted Area	Delivered Weight (in 000s)	Average Yield	Average Price
75,000	9,000	120	\$115

Primary Regional Processors:

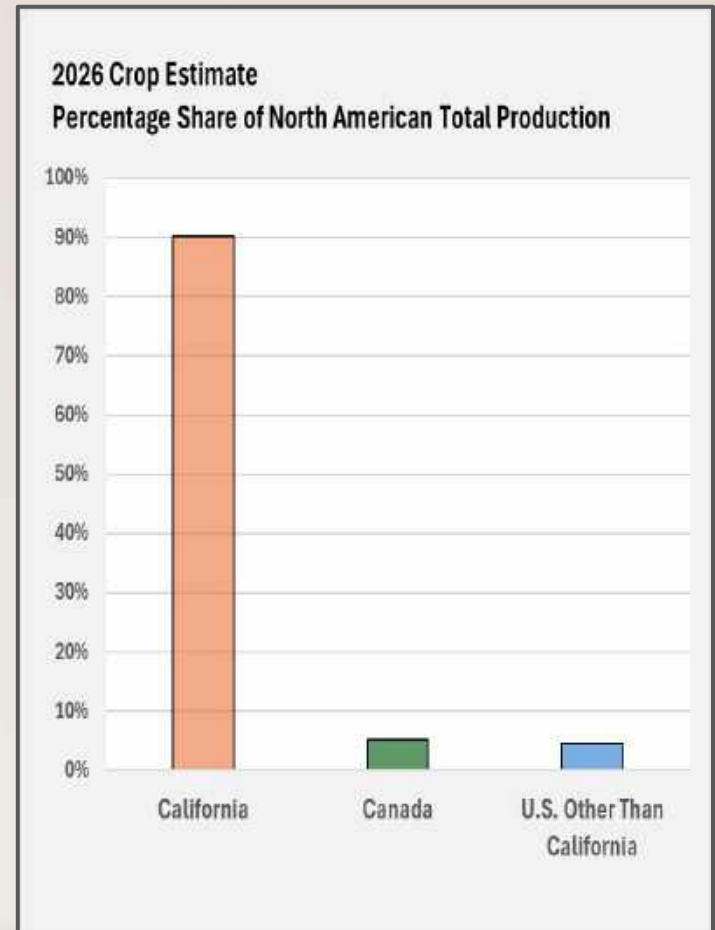
- The Morning Star Company (Woodland)
- Ingomar Packing Company (Los Banos)
- JG Boswell Tomato Company (Corcoran)
- Los Gatos Tomato Products (Huron)
- Neil Jones Food Company (Firebaugh)
- Campbell Soup Company (Dixon)
- ConAgra Brands (Oakdale)
- Stanislaus Food Products (Modesto)
- Pacific Coast Producers (Woodland)
- Kraft-Heinz Escalon (Escalon)



2026 Forecasted Processing Tomato Production North America

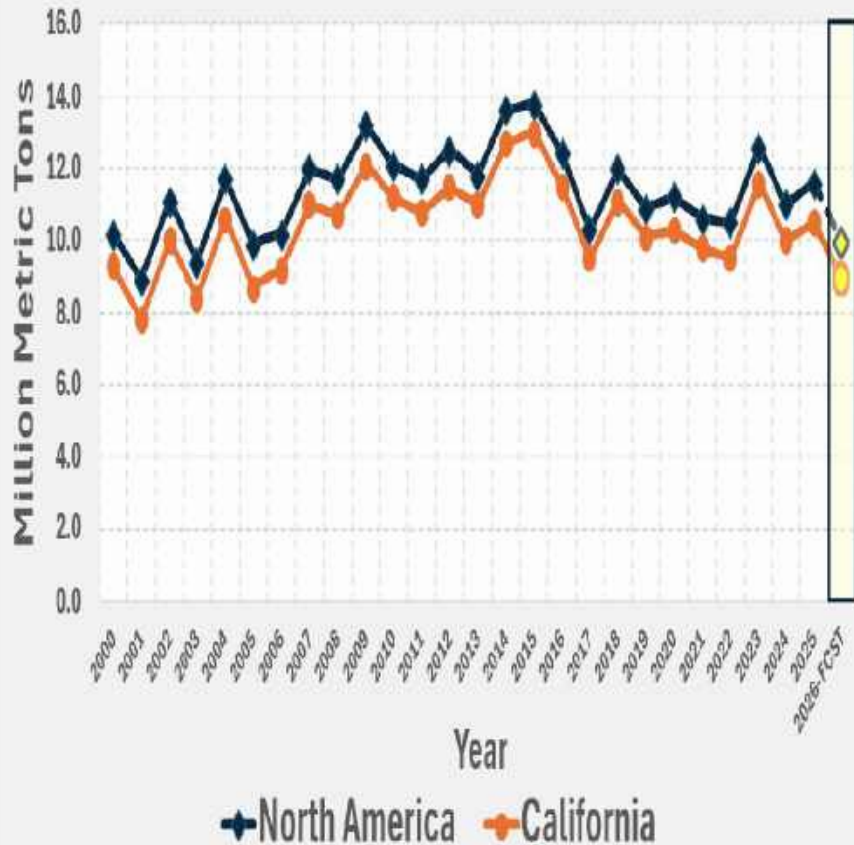
2026 Crop Estimate				
Region	Planted Area	Delivered Weight (in 000s)	Average Yield	Average Price
Western	75,000	9,000	120	\$115
Midwest	10,000	912	91	\$136
Northeast	830	62	75	\$141
Total North America	85,830	9,974	116	\$117

2026 Crop Estimate				
WPTC Region	Planted Area	Delivered Weight (in 000s)	Average Yield	Average Price
California	75,000	9,000	120	\$115
Canada	4,900	519	106	\$121
U.S. Other Than California	5,930	455	77	\$152
Total North America	85,830	9,974	116	\$117

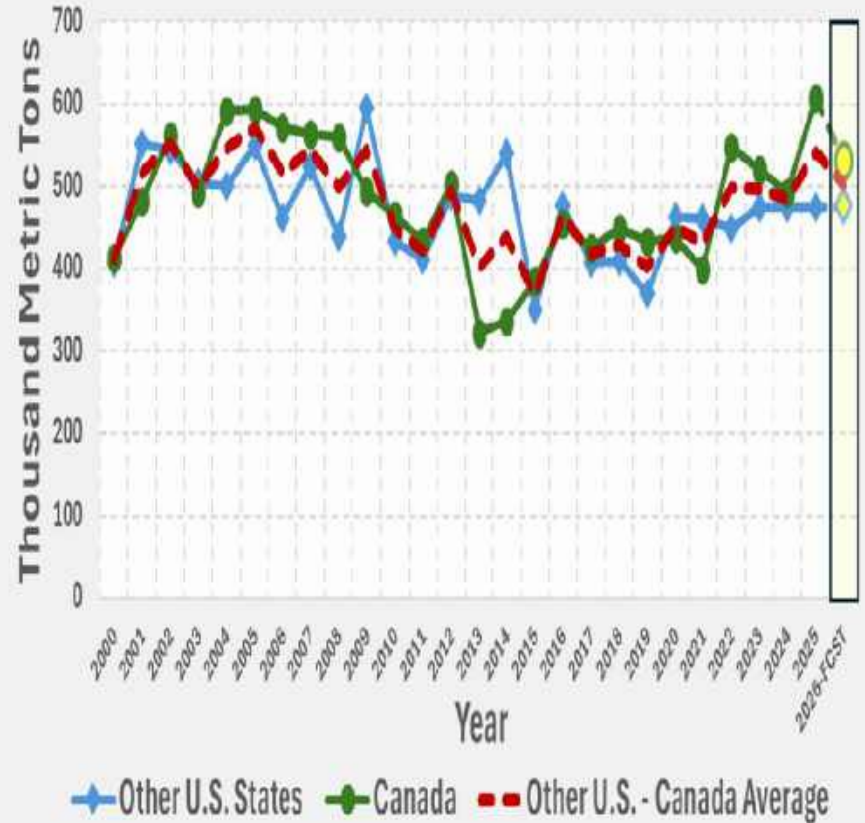


North American Processing Tomato Production

Panel A: California Drives North American Production

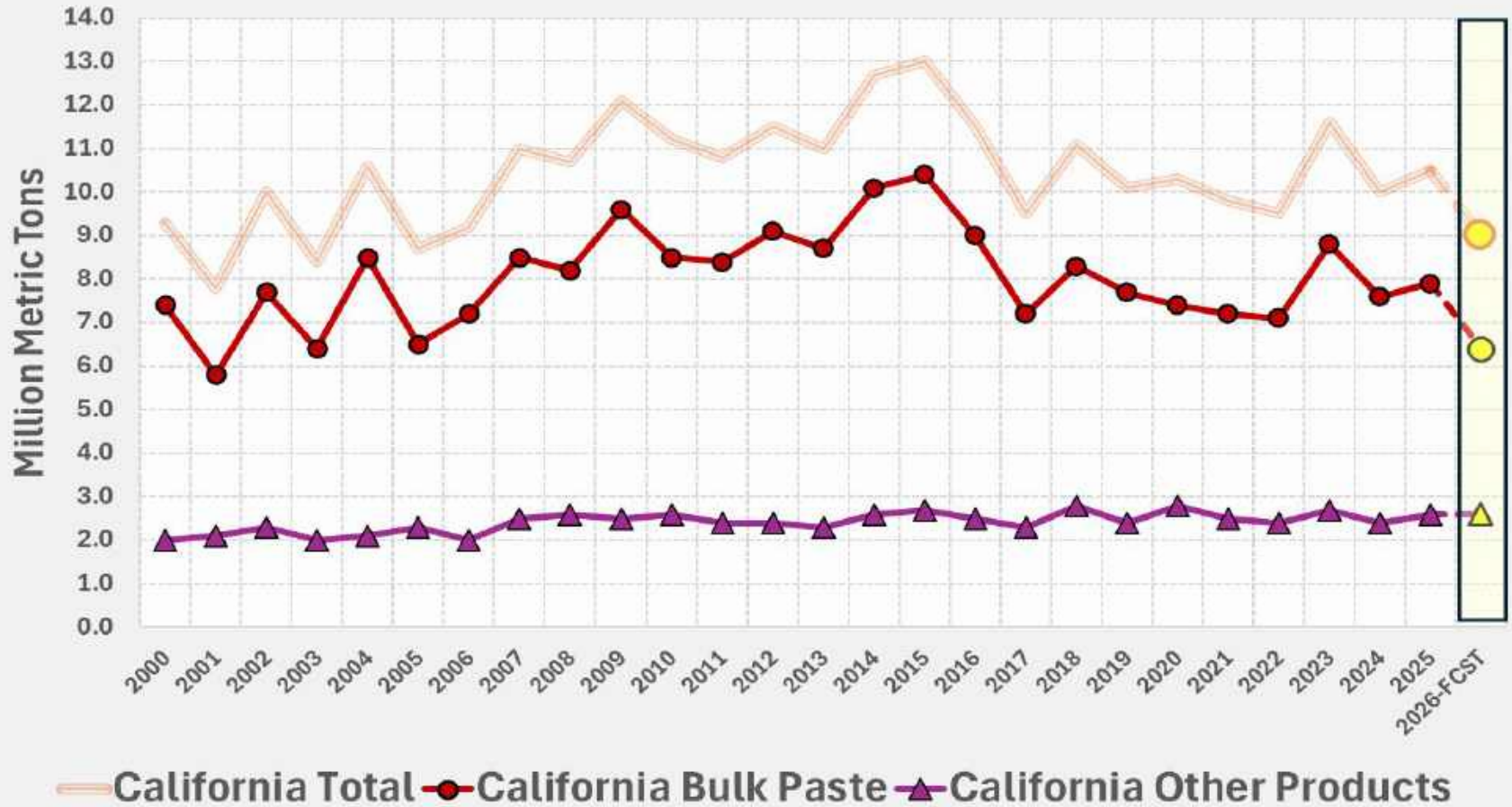


Panel B: Other U.S. & Canada Contribute, but at a Smaller Scale

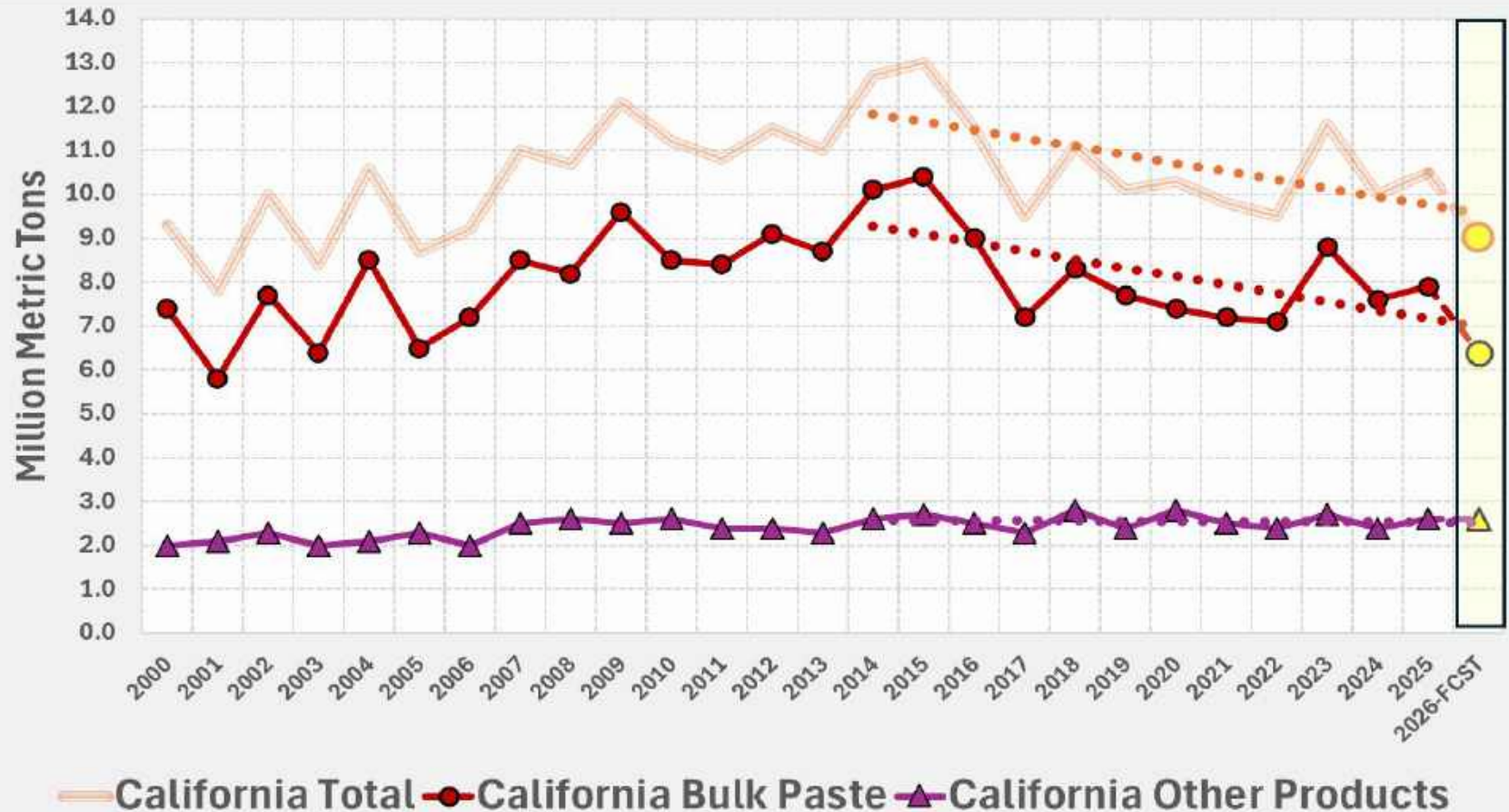


CALIFORNIA

California Processing Tomato Production



California Processing Tomato Production

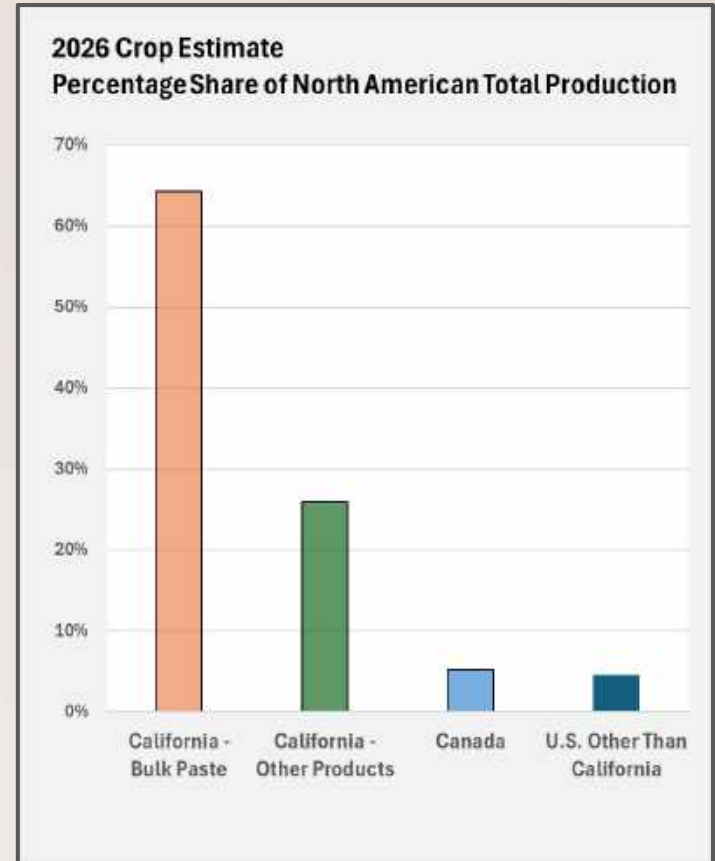


SUMMARY



2026 Forecasted Processing Tomato Production North America

2026 Crop Estimate				
Region	Planted Area	Delivered Weight (in 000s)	Average Yield	Average Price
California - Bulk Paste	53,500	6,414	120	\$115
California - Other Products	21,500	2,586	120	\$115
Canada	4,900	519	106	\$121
U.S. Other Than California	5,930	455	77	\$152
Total North America	85,830	9,974	116	\$117



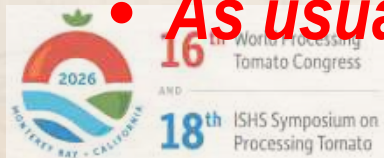
Closing Comments:

- Planting activities and crop development look to be on track for all three North American processing regions
- California has experienced some unseasonal weather. So far, any negative impacts are expected to be limited
- California is expecting to begin some processing by the 2nd week of July. The state is expected to be operating at full capacity by early August
- California's forecasted production is based on an assumed average yield of 120 Metric Tons per Hectare. By historical standards, this is aggressive. However, 2025 performance shows it is definitively achievable.

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• ***As usual, it should be another exciting season.***



THANK YOU!

*Please send any questions or comments to:
mdelamater@morningstarco.com*

