AUSTRALIAN PROCESSING TOMATO RESEARCH COUNCIL Inc.

ANNUAL INDUSTRY SURVEY

2025

Contents

1 Executive Summary

The annual industry survey provides a year-on-year comparison, detailing industry performance in the current year compared with the previous one.

The data also tells the 'story' of Australian production and international trade over a longer period of time, supporting analysis of where the industry is headed, for example in terms of grower numbers, production, and location.

The 2024/25 season was favourable in terms of yield, total delivered tonnes and product quality. The favourable growing season and dry harvest period meant several growers delivered over contract fruit and achieved record average yields.

During the 2024/2025 season, eight growers produced 211,011 tonnes of processing tomatoes, almost exactly what was produced in 2023/24 (211,350 MT), however for the first time, the crop was processed by only two Australian processing companies.

Some 2,040 hectares were planted in total, with sub-surface drip irrigation used for 1,936 ha, and pivot irrigation used for 104 ha.

The use of transplants was slightly higher than the previous year at 87% of the total area under production, with direct-seeded tomatoes making up the remaining 13%.

In 2024/25, the Australian processing tomato industry achieved an average yield of 104.4 tonnes per hectare and 99% of the planted area was harvested.

The typical inverse relationship between yield and solids means there is often a drop in average solids when yields are higher. This season however, both high average yields and high soluble solids, which averaged 5.4%, were achieved. This is likely due to favourable and balanced weather conditions and modern cultivar selections supporting skilled farming enterprises.

On the international scene, imports and exports are reviewed and discussed in the context of the **previous calendar year** (2024), not the abovementioned processing season (2024/25).

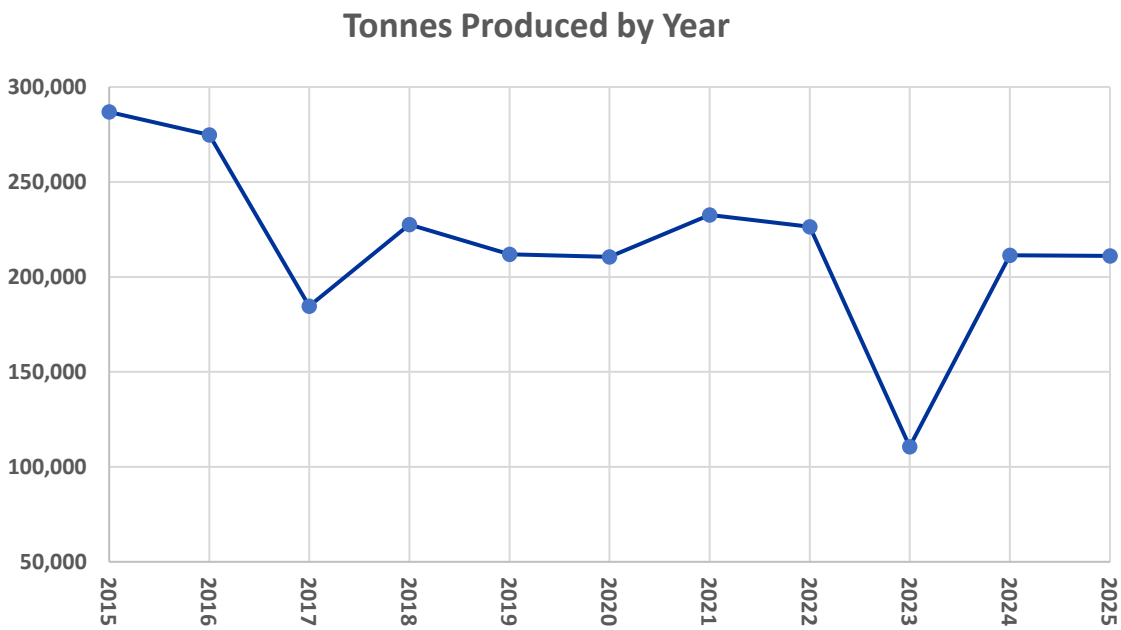
The importation of processed products into Australia increased sharply in the 2024 calendar year, a confirmation that the current world oversupply issue is flowing into our local market spaces and applying extra pressure to processors and growers.

As predicted, with a favourable season of production to support it, the exports of Australian processed tomatoes increased significantly, more than doubling in 2024 Vs 2023. To put this into context however, the levels are just returning to pre-covid levels and don't represent any significant new trend toward higher export market access.

By the numbers, Australian domestic consumption increased significantly in 2024 a record level of 28 kgs per capita. The increase in domestic consumption was supplied by improved local production and increased imports. With a total domestic demand of over 700,000 tonnes of tomatoes and a current domestic production closer to 200,000 tonnes, there is significant scope for higher local production within Australia if only the local markets and governments would do more to support our industry.

2 Industry Size

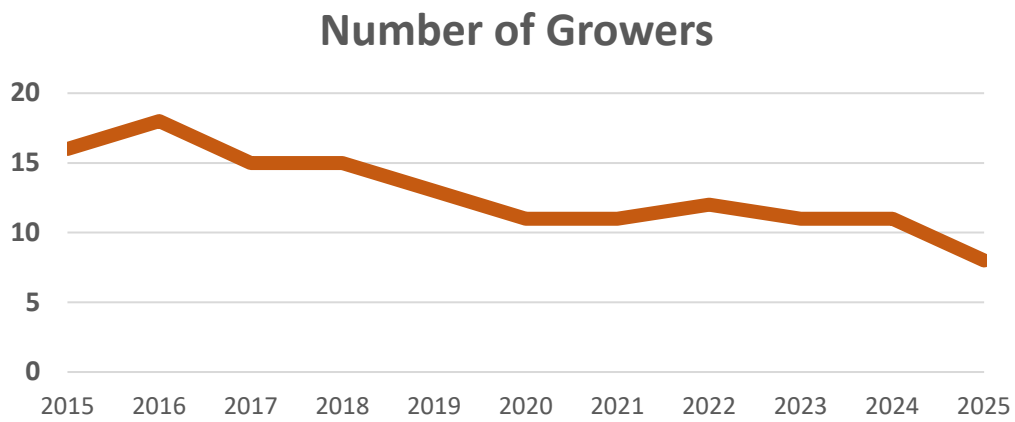
2.1 Volume



2.1.1 Paid tomato volumes delivered (tonnes) (APTRC)

Growers produced 211,011 tonnes of processing tomatoes during the 2024/25 season, with the bulk of demand coming from Kagome and a smaller quantity processed through SPC. There were no organic tomatoes processed this season.

2.2 Producers



2.2.1 Number of growers (APTRC)

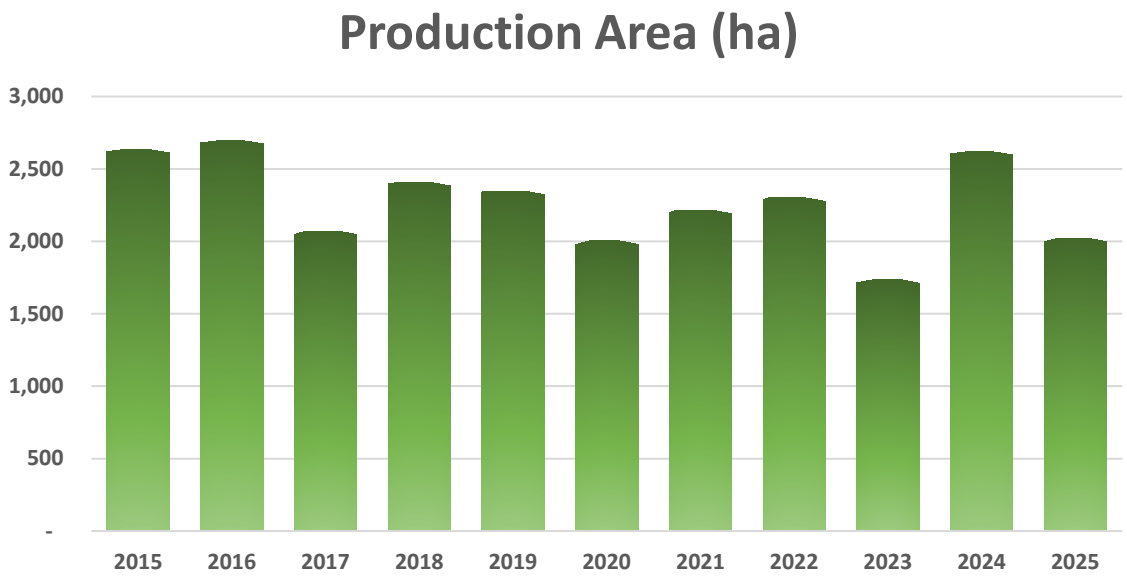
There were 8 specialist businesses producing for the 2024/25 processing tomato season, with the majority grown across Northern Victoria, and a lesser amount grown in Southern NSW.

2.3 Processors

This season, Kagome took 82% of the total crop and SPC 18%, which is typical of these two processors.

3 The Crop

3.1 Area and management



3.1.1 Planted production area (ha) (APTRC)

Production area dropped to 2,040 hectares (99% harvested), yet total tonnes equalled last season's output from 2,741 hectares. This was achieved through markedly higher yields, reflecting a return to typical Australian field conditions in the absence of severe storm or flooding impacts.

Season		Transplanted	Seeded
2010/11		79%	21%
2011/12		81%	19%
2011/13		72%	28%
2013/14		59%	41%
2014/15		68%	32%
2015/16		69%	31%
2016/17		86%	14%
2017/18		88%	12%
2018/19		91%	9%
2019/20		86%	14%
2020/21		90%	10%
2021/22		85%	15%
2022/23		94%	6%
2023/24		85%	15%
2024/25		87%	13%

3.1.2 Proportions of transplants Vs seed by area grown (APTRC)

This season, the crop was mainly grown under sub-surface drip irrigation, however Kagome Farms grew an increased area of 104 ha using only centre pivot irrigation (i.e., without drip irrigation). This method has proven useful in the normal rotation for Kagome Farms, where they already grow carrots and garlic crops on sand.

Direct-seeding declined slightly this season as the Boort region, typically a direct-seeding stronghold, shifted more of its production to transplants.

Area and Production by State	VIC	NSW

Area Planted	72.7%	27.3%
Tomato Volume Processed	83.9%	16.1%

3.1.3 Production by State (APTRC)

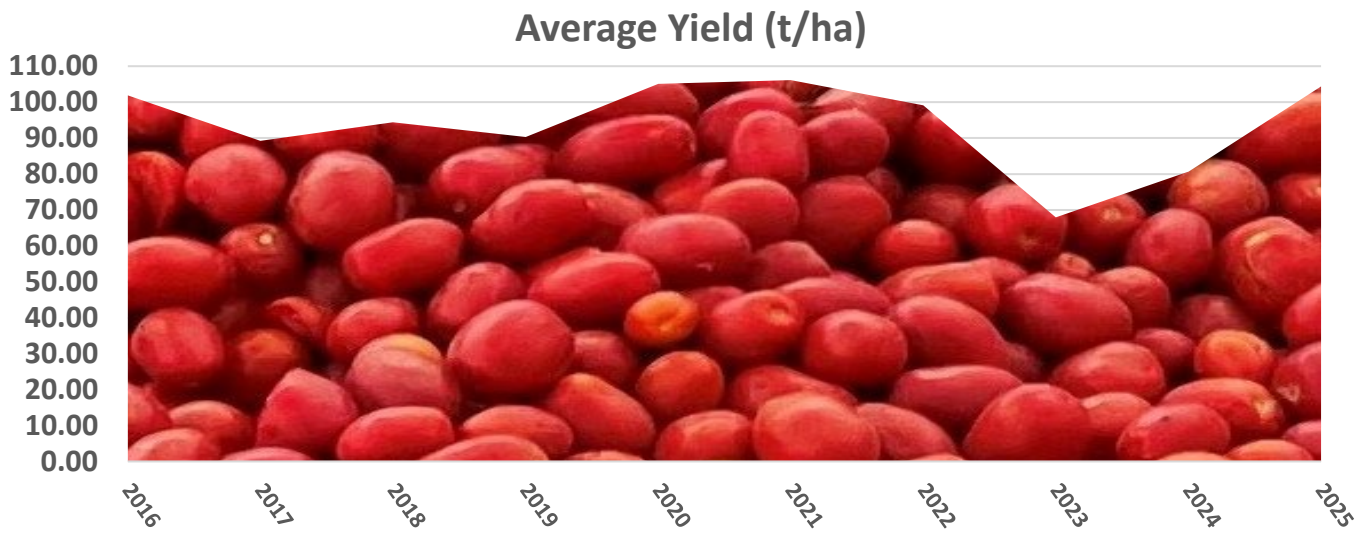
In the 2024/25 season, the proportion of planted area by state did not align with the proportion of production. This discrepancy was driven by several Victorian SPC growers achieving record average yields, which increased Victoria's share of total production.

3.2 Yield

Season	Area (Ha) Planted	Area (Ha) Processed	Area % Harvested	Average Yield MT/ha	Major Seasonal Challenges
2012/13	1999	1998	100%	96.6	Wet, late harvest
2013/14	2386	2330	98%	93.6	Wet, late harvest
2014/15	2700	2635	98%	106.1	Early crop failure
2015/16	2782	2697	97%	101.9	Poor crop stand, delayed harvest, over-contract fruit
2016/17	2183	2071	95%	89.2	Delayed harvest due to rain
2017/18	2457	2407	98%	94.4	Abandoned due to factory power outage and resulting delay
2018/19	2347	2347	100%	90.3	Extreme bacterial speck, high temperatures
2019/20	2073	2003	97%	105.1	Hot and windy during growing; late harvest rains
2020/21	2215	2215	100%	106.13	Dry start, strong winds mid spring, some hail, mild summer
2021/22	2480	2300	93%	99.1	Delays from staff scarcity and crops abandoned due to wet finish
2022/23	1733	1643	95%	67.9	Excess early rainfall & flooding caused planting delays and losses
2023/24	2741	2620	96%	80.7	Storms caused widespread damage and poor growth due to flooding
2024/25	2040	2021	99%	104.4	Favourable weather and record yields for some growers

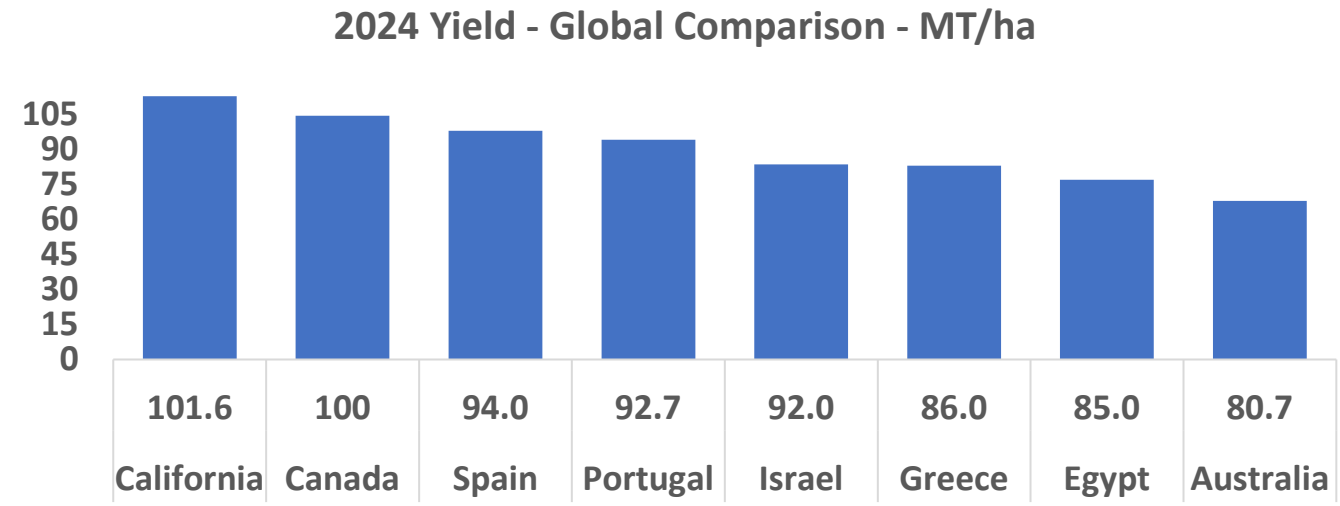
3.2.1 Average yield, harvest conditions (MT/ha) (APTRC)

Growers enjoyed a notably favourable season, with steady temperatures, very few extreme weather events, and almost no delays due to rain during harvest. It marked a sharp contrast to the difficulties of recent years, including widespread flooding in 2022/23 and damaging storms in 2023/24.



3.2.2 Average yield (t/ha) (APTRC)

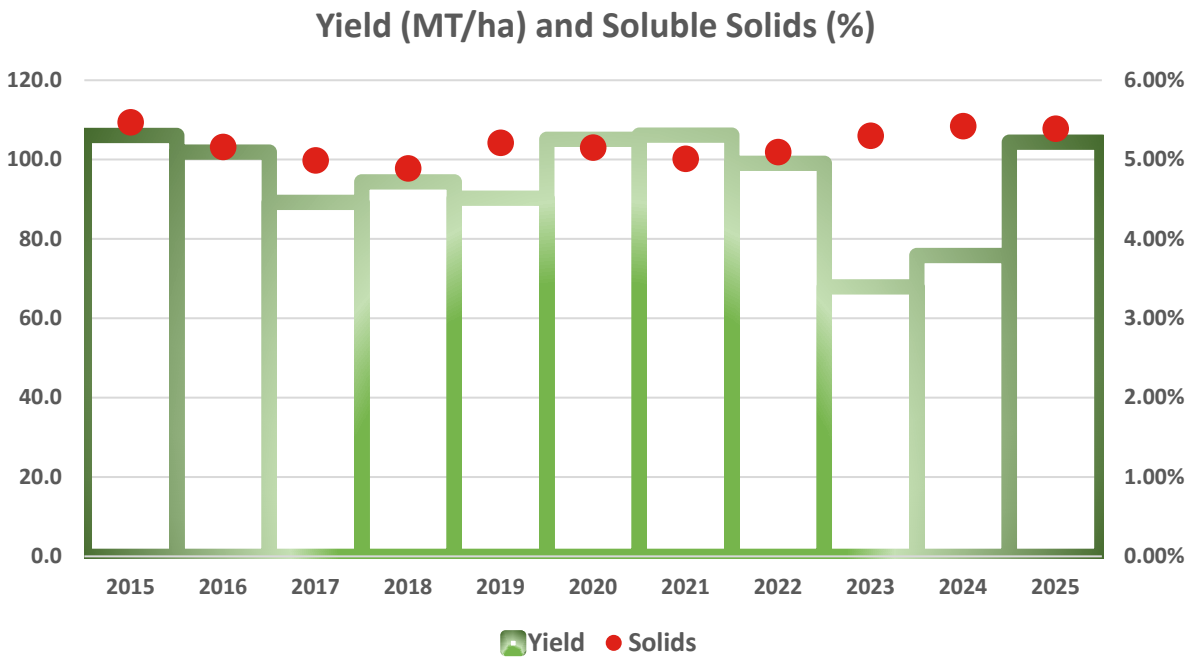
The industry recorded an average yield of 104.4 t/ha in the 2024/25 season—an exceptional result reached by only a small number of countries globally.



3.2.3 2024 average yield (MT/ha), by country (Colvine)

Note: For the most accurate global comparison, international production data is reported one season behind. Accordingly, this report compares Australian performance with the 2023/24 global season. This timing reflects the later availability of Northern Hemisphere data.

3.3 Soluble Solids



3.3.1 Soluble solids (%) and yield (t/ha) (APTRC)

Average soluble solids for the season were 5.4%, which is above the minimum benchmark of 5.0% preferred by processors.

3.4 Cultivar

CULTIVARS	Percentage of Total Area Grown	
	2024/25	*2023/24*
H3402	33.2%	*38.3%*
H1015	22.3%	*22.7%*
UG16112	11.8%	*6.8%*
SVTM9000	7.9%	*2.5%*
H1311	5.1%	*6.6%*
H1014	4.5%	*0.0%*
H1301	4.2%	*2.2%*
UGMIX	2.8%	*6.9%*
SVTM9025	2.7%	*0.0%*
SVTM9023	1.8%	*2.6%*
SVTM9024	1.4%	*0.5%*
HM58811	0.65%	*0%*
H1281	0.37%	*0%*
SVTM9018	0.21%	*0%*
H1657	0.17%	*0%*
SVTM9300	0.16%	*0%*
Eventus	0.15%	*0%*
UG6617	0.15%	*0%*
H1884	0.14%	*0%*

HM58841	**0.10%**	*0%*
UG29814	**0.10%**	*0%*
SVTM9037	**0.08%**	*0%*

3.4.1 Cultivar by proportion of total area

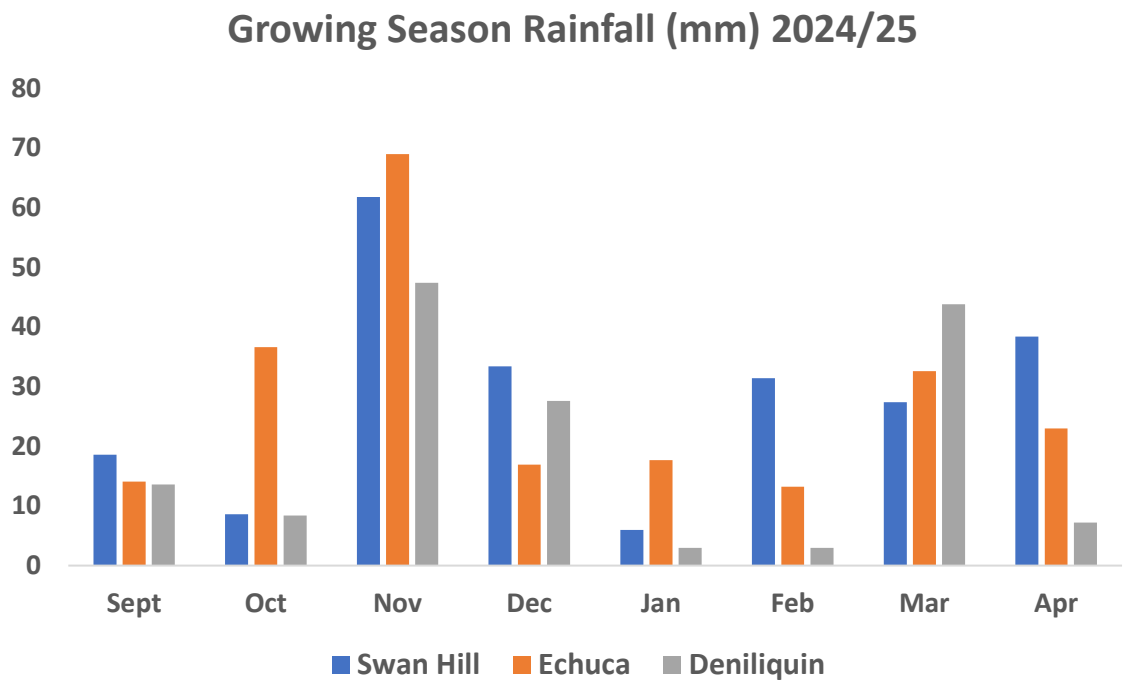
When comparing the 2023/24 and 2024/25 seasons, the cultivars supplying the majority of production remained broadly consistent; however, the industry's appetite for commercially testing new genetics increased markedly. With 22 cultivars recorded, this is likely the most diverse range of tomatoes ever grown in Australia.

The well-supported APTRC cultivar improvement trial program is accelerating the introduction of modern, optimised processing-tomato genetics into commercial systems. The impact is now evident, with commercial plantings becoming increasingly diverse across the industry.

This diversification enhances resilience by reducing seed-supply risks—such as biosecurity threats, shortages, or production stoppages—while also keeping innovation for yield and brix improvement firmly at the forefront of the Australian processing tomato sector.

4 The Season

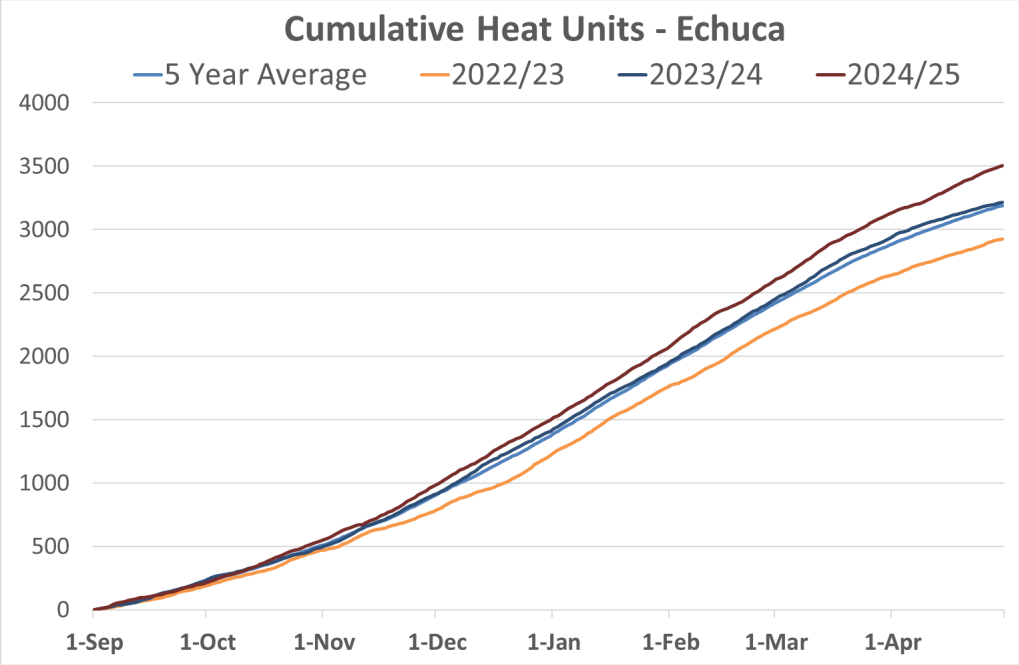
4.1 Rainfall



4.1.1 Rainfall across the major growing regions (mm) (BOM)

For most regions, rainfall was light on for planting during late September and through October. The November rain caused some operational delays but were not detrimental. For the majority of the harvest period, during January through to April, rainfall totals were moderate to low and manageable.

4.2 Heat Units



4.2.1 Heat units – Echuca (BOM)

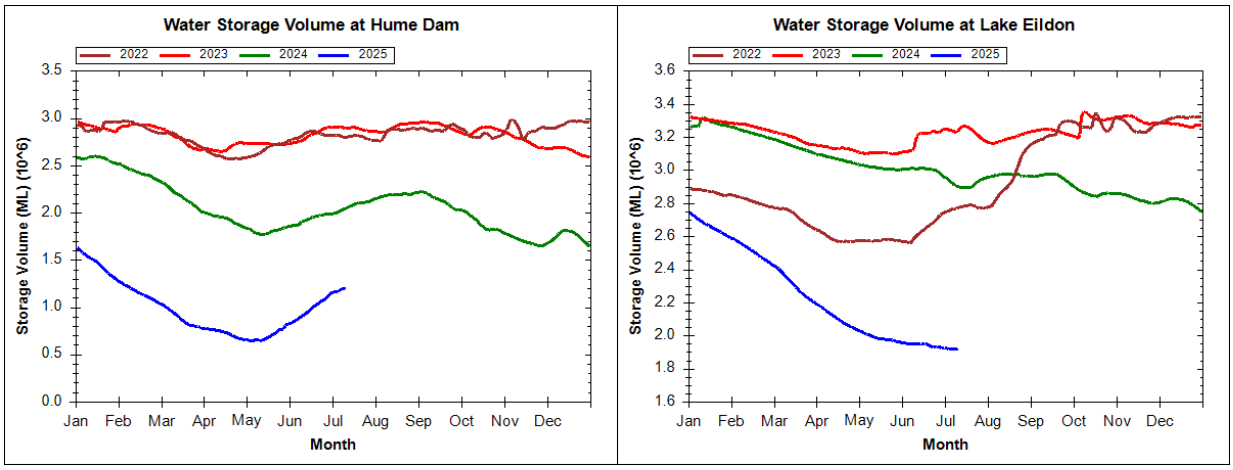
The heat units recorded during the major crop growth period demonstrate that the season was warmer than the 5-year average and this likely contributed in some part to the increased average yields across industry.

Although this graph uses data from Echuca, it's a central point for industry and can be generally considered indicative of what was experienced by growers in surrounding regions.

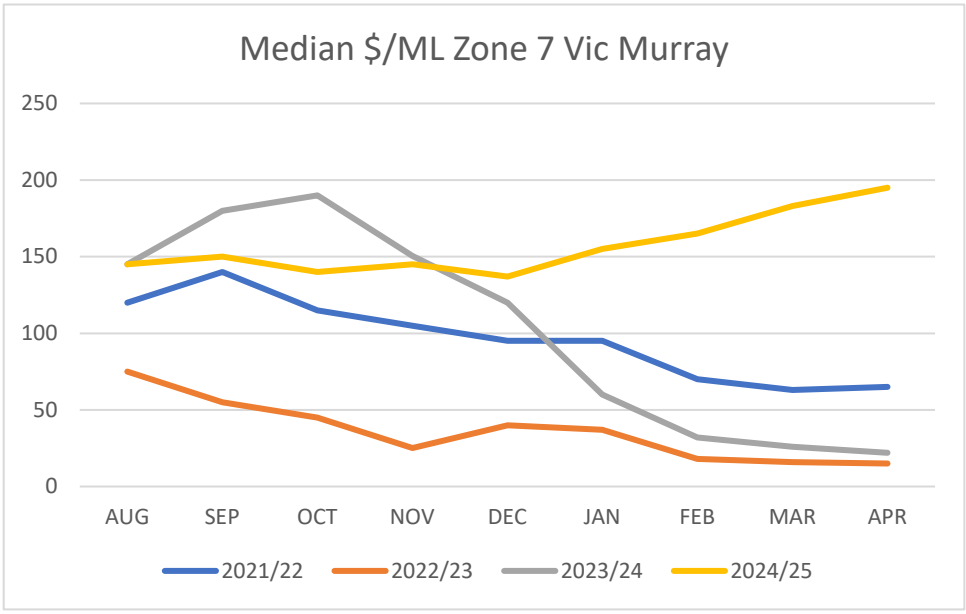
4.3 Water Storages

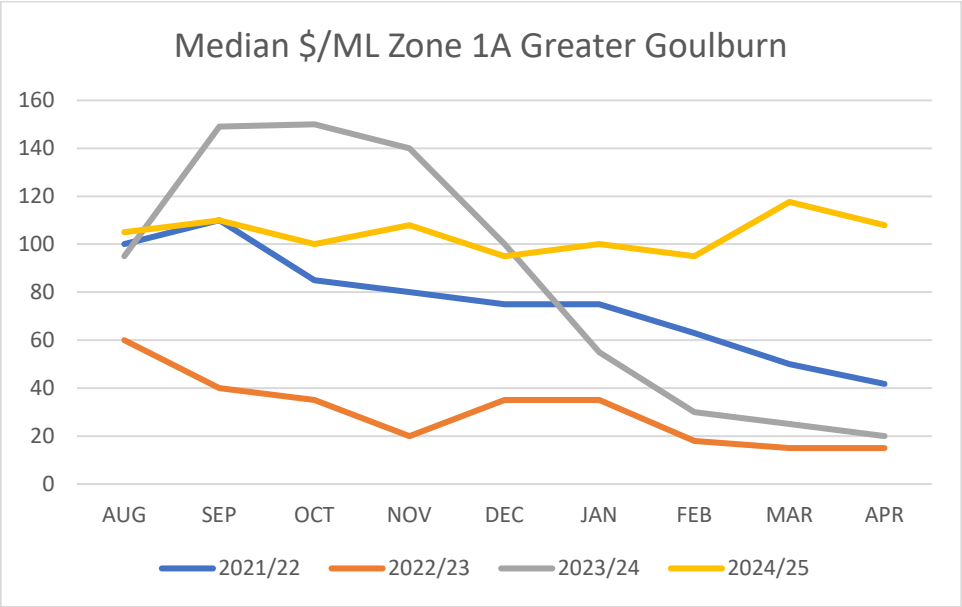
4.3.1 Storage Volume, Lake Eildon and Hume Dam (GMW)

The water storage level in Hume and Eildon dropped off significantly during the growing season and without re-charge in the next 6 months, the storage levels will remain suppressed and consequently allocations for the 2024/25 season are set to be greatly diminished.



4.4 Water Price





4.4.1 Zone 1A and Zone 7 median water price ($/ML) (Registry)

The price of water during 2024/25 began on par with the previous year, however continued to increase as the season progressed and storages were diminished through summer cropping usage and no recharge. The price could continue to rise further still into the 2025/26 season if the lack of significant rainfall continues across the catchments.

5 Trade

5.1 Imports

Product	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Dried/powder	26,875	34,506	37,934	37,660	34,880	28,017	29,143	34,263	26,638	28,767
Whole/pcs <1.14L	45,222	40,965	43,354	42,683	41,799	51,121	36,356	45,488	38,479	47,055
Whole/pcs >1.14L	28,088	22,997	24,002	24,275	22,369	21,129	21,316	24,029	18,908	23,420
Paste/puree<1.14L	153,210	102,733	107,923	109,578	110,328	159,447	137,971	125,751	147,343	183,182
Paste/puree>1.14L	102,866	130,171	140,532	144,906	133,524	143,118	140,502	187,046	203,539	197,038
Juice	75	83	38	75	50	30	17	47	27	19
Sauce/ketchup	39,276	38,462	45,705	45,946	47,050	48,375	45,788	51,585	58,092	71,376
Total Tomato	**395,612**	**369,917**	**399,488**	**405,123**	**389,999**	**451,236**	**411,093**	**468,210**	**493,026**	**550,857**

5.1.1 Imports of Tomato Products (equivalent raw tonnes) (ABARES)

The volume of imports rose sharply during 2024 in all categories except for Juice and Paste/puree>1.14L.

This year again set a new record for import volumes—the highest since the industry began tracking data in 2010—extending a consistent year-on-year upward trend.

The largest sources of these imports, sorted by category were as follows (where the major importer supplied less than 90% of the total, the next most significant supplier/s are also included).

- **Dried/powder** – Turkey 50%, China 18%, New Zealand 12%
- **Whole/pcs <1.14L** – Italy 97%
- **Whole/pcs >1.14L** – Italy 95%
- **Paste/puree<1.14L** – Italy 72%, China 22%, Chile 2%
- **Paste/puree>1.14L** – USA 41%, China 39%, Italy 11%
- **Juice** – USA 58%, Mexico 19%, UK 8%
- **Sauce/ketchup** – Italy 43%, New Zealand 18%, Spain 12%

At 62% of total volume (last year 60%), Italy remains the dominant source of imported processed tomato products into Australia. The next largest suppliers were China and USA, supplying 14% and 8% respectively into Australia.

Product	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Dried/powder	5.98	5.33	5.61	5.77	5.69	6.22	5.42	6.05	7.23	7.81
Whole/pcs <1.14L	1.17	1.22	1.10	1.17	1.26	1.39	3.02	1.58	2.11	1.74
Whole/pcs >1.14L	0.99	0.92	0.89	0.97	1.00	1.00	2.05	1.24	1.78	1.81
Paste/puree<1.14L	1.36	1.34	1.27	1.27	1.40	1.56	1.54	1.75	2.30	2.94
Paste/puree>1.14L	1.27	1.14	1.08	1.15	1.24	1.31	1.20	1.47	3.73	4.47
Juice	1.54	0.88	2.37	1.79	1.87	3.09	3.31	2.85	3.47	4.62
Sauce/ketchup	1.71	1.73	1.75	1.78	1.91	2.19	2.15	2.22	2.72	2.78
Total Tomato	**1.31**	**1.31**	**1.26**	**1.32**	**1.42**	**1.54**	**2.11**	**1.70**	**2.67**	**2.80**

5.1.2 Average import prices ($/kg), in 2024 monetary values (ABARES)

5.2 Correlation between Imports and Price

The overall price of imports in 2024 only rose marginally across categories but actually decreased for Whole/pcs<1.14 L—the category that typically represents canned tomatoes. Lower import prices, coupled with the significant increase in import volume for this product category explains the competitive pressures facing Australia's domestic processing sector in the canned tomato market.

Across the past decade, price–volume correlations show mixed behaviours:

- Juice displays a strong negative correlation, indicating that as prices rise, import volumes decline.
- Sauce/ketchup and Paste/purée show moderate positive correlations, meaning import volumes have risen alongside increasing prices.

Broadly, correlations vary considerably across imported products—ranging from moderately positive to moderately negative—and often differ by package size within a category. This pattern suggests that price is not the dominant driver of import volumes for most product types, with Juice being the main exception.

Where positive correlations appear between rising import prices and rising import volumes, it is unlikely that higher import prices are causing increased imports. Instead, it is more likely that domestic prices are rising even faster, making imported product relatively more attractive despite its own gradual price increases. As a result, local buyers may be purchasing more imported product even as import prices trend upward.

5.3 Exports

Product	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Whole/pieces	746	461	133	62	139	623	273	417	513	484
Paste/puree	43,747	104,518	21,852	16,402	11,695	32,766	38,323	22,032	9,085	3,725
Sauce/ketchup	8,196	4,039	8,799	11,636	13,227	14,788	17,986	13,660	5,661	18,504
Juice	131	57	50	80	106	52	47	118	112	167
Total Tomato	**52,819**	**109,075**	**30,834**	**28,180**	**25,167**	**48,228**	**56,629**	**36,227**	**15,371**	**22,880**

5.3.1 Exports of tomato products (ABARES) (equivalent raw tonnes)

Overall export volumes increased slightly this season, though exports continue to represent only a very small share of Australia's total tomato production. While exports of Paste/purée declined significantly, this was offset by a substantial increase in the sauce/ketchup category.

The largest export markets, sorted by category and then by country were as follows:

- **Whole/pieces** – Thailand 61%, New Zealand 8%, Papua New Guinea 8%
- **Paste/puree** – New Zealand 44%, Thailand 24%, Japan 10%
- **Sauce/ketchup** – New Zealand 33%, Japan 28%, China 11%
- **Juice** – Hong Kong 26%, South Korea 20%, New Zealand 11%

At 33% of all products (2023 was 22%), New Zealand was the major export destination for Australian processed tomato produce, with Japan close behind at 25% and China at 10% of total exports.

Product	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Whole/pieces	4.97	6.18	8.05	5.73	3.14	2.03	3.54	3.75	3.17	3.23
Paste/puree	1.55	1.20	1.43	1.70	2.16	2.71	2.53	2.55	2.93	3.47
Sauce/ketchup	3.13	3.30	2.35	2.40	2.44	2.81	2.41	2.33	2.99	2.88
Juice	1.55	1.94	1.37	2.08	1.26	1.28	1.19	1.23	1.60	1.22
Total Tomato	**2.27**	**1.52**	**2.02**	**2.20**	**2.38**	**2.73**	**2.47**	**2.44**	**2.96**	**2.90**

5.3.2 Average export prices ($/kg) (ABARES), in 2024 monetary values

The real price of exports decreased slightly in 2024, which is disappointing for the Australian processing industry. However, for the Paste/puree category at least, the price had a noticeable increase.

- The data suggests a moderate negative correlation between average export price and volume exported, meaning that as price goes up, volume exported goes down.
- This applies to all product categories, except for Juice, which consistently appears to have no correlation to export price whatsoever.

Over the past decade, the relationship between Australia's export volumes and the USD exchange rate has steadily weakened. Exchange rates no longer explain much of the movement in export activity; instead, other forces are shaping outcomes. Chief among these is the much lower pricing offered by competitor countries, which affects Australia's ability to compete far more than fluctuations in currency values.

5.4 Market Demand

Calendar Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	5 yr	10 yr
Dom. Demand	629,620	534,691	553,336	604,579	576,793	613,485	587,025	658,422	588,276	**751,743**	639,790	609,797
Imports	395,613	368,918	399,488	405,123	389,999	451,236	411,093	468,210	493,026	**550,857**	474,885	433,356
Net Australian	234,007	165,773	153,848	199,456	186,794	162,249	175,933	190,212	95,250	**200,885**	164,906	176,441
Imported %	63%	69%	72%	67%	68%	74%	70%	71%	84%	**73%**	74%	71%
Local %	37%	31%	28%	33%	32%	26%	30%	29%	16%	**27%**	26%	29%
Per capita (kgs)	**26**	**22**	**22**	**24**	**22**	**24**	**23**	**25**	**22**	**28**	**24**	**24**

5.4.1 Apparent domestic market demand (ABARES) (equivalent raw tonnes)

Table 5.4.1 represents the Australian market demand for processed tomato products and shows how this demand is being supplied, from local or imported products.

For individual years, combining data can produce non-matched results; ABARES data is based on a calendar year, rather than a seasonal year, and this survey is unable to account for year-end stocks. However, these factors should tend to be mitigated when viewed over time, such as through the 5-year or 10-year averages.

Considering this data, the following may be noted:

- **Imports:** Imports increased in the 2024 calendar year and were significantly higher than the 10-year average.

- **Net Australian:** The net Australian figure equates to tomatoes processed, less exports and in 2024 calendar year has returned to more normal levels, due to a more significant value of delivered tonnes in 2024.

- **Domestic Demand:** Although the figures imply a strong rise in domestic consumption in 2024, it's unlikely demand surged that dramatically in a single year. Instead, the elevated number more likely reflects a combination of higher imports and strong domestic production that has replenished stocks, with some potential overstocking from cheap imports.

- **Imported %:** Levels of imported product have now re-balanced to the more expected ratio's of 73% Imported Vs 27% Local. Ideally, we would like to see imports decrease, as more Australian markets support local grown and processed product.

- **Local %:** The percentage of local product sold in the Australian market increased to more traditional levels that we've seen over the past 5-year average.

- **Per Capita kgs:** Per-capita consumption rose to 28 kg of raw-tomato equivalent, but this spike is unlikely to reflect Australians genuinely eating that much more tomato product in 2024. It is more plausibly a re-stocking anomaly rather than a true demand shift and is not expected to be sustained. For meaningful insight into consumer behaviour, the 5-year and 10-year averages remain the more reliable indicators of underlying consumption trends.

6 Global Industry

6.1 Production

In 2024, recorded global production totalled 44,416 million tonnes, compared to 38,449 million tonnes for the previous year; a considerable increase of 15.5%. This is mainly due to the significant increase in China's production, on top of a large crop in the USA.

In 2024, Australia contributed 0.5% of global production and moved its ranking up to 20th for industry volume.

Country	Season	2023	2024	2025 Prelim	% Change 2024-25E	Ranking 2024	% Total 2024
China	Jul-Dec	8000	10450	4900	-53,1%	1	22.8%
USA	Jul-Dec	12031	9999	10650	6,5%	2	21.8%
Italy	Jul-Dec	5404	5272	5700	8,1%	3	11.5%
Spain	Jul-Dec	2600	3080	2400	-22,1%	4	6.7%
Turkey	Jul-Dec	2700	2700	2200	-18,5%	5	5.9%
Brazil	Jul-Dec	1571	1650	1420	-13,9%	6	3.6%
Portugal	Jul-Dec	1500	1500	1300	-13,3%	7	3.3%
Iran	Jul-Dec	2000	1400	1800	28,6%	8	3.1%
Algeria	Jul-Dec	1350	1300	1300	0%	9	2.8%
Chile	Jan-Jun	1150	1300	1340	3,1%	10	2.8%
Tunisia	Jul-Dec	826	1000	935	-6,5%	11	2.2%
Russia	Jul-Dec	660	670	650	-3,0%	12	1.5%
Argentina	Jan-Jun	586	630	620	-1,6%	13	1.4%
Egypt	Jul-Dec	600	624	780	25,0%	14	1.4%
Ukraine	Jul-Dec	500	550	500	-9,1%	15	1.2%
Greece	Jul-Dec	390	510	510	0%	16	1.1%
Canada	Jul-Dec	520	493	575	16,6%	17	1.1%
Poland	Jul-Dec	250	400	400	0%	18	0.9%
Dominican Republic	Jul-Dec	227	227	227	0%	19	0.5%
Australia	**Jan-Jun**	**110**	**211**	**211**	0%	**20**	0.5%
Israel	Jul-Dec	197	184	180	-2,2%	21	0.4%
France	Jul-Dec	160	168	175	4,2%	22	0.4%
India	Jan-Jun	162	162	162	0%	23	0.4%
Peru	Jan-Jun	150	150	160	6,7%	24	0.3%
South Africa	Jan-Jun	160	140	160	14,3%	25	0.3%
Hungary	Jul-Dec	110	120	97	-19,2%	26	0.3%
Morocco	Jul-Dec	100	100	100	0%	27	0.2%
Senegal	Jan-Jun	73	73	73	0%	28	0.2%
Bulgaria	Jul-Dec	37	60	40	-33,3%	29	0.1%
Syria	Jul-Dec	40	40	40	0%	30	0.1%
Mexico	Jan-Jun	40	40	40	0%	31	0.1%
Thailand	Jul-Dec	40	40	40	0%	32	0.1%
New Zealand	Jan-Jun	25	39	37	-5,1%	33	0.1%
Japan	Jul-Dec	26	26	25	-3,8%	34	0.1%
Czech Republic	Jul-Dec	25	25	25	0%	35	0.1%
Slovakia	Jul-Dec	20	20	20	0%	36	0.0%
Venezuela	Jul-Dec	24	14	14	0%	37	0.0%
Malta	Jul-Dec	6	7	7	0%	38	0.0%
Total		**44370**	**45849**	**40288**	**-12,1%**		**100.0%**

6.1.1 World Production by Country ('000 tonnes) (Colvine)

6.2 Outlook

- Looking ahead to the 2025/26 season, Australia's forecast has been reduced to 166,000 MT to be processed this year by two processors. The significant reduction in contracted tonnes is a direct result of global oversupply and excess product being imported into Australia, putting extreme pressure on local processors and loyal Australian brands to maintain market share.

7 References

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** n.d. denotes where 'no date' could be found for publishing.*