AUSTRALIAN PROCESSING TOMATO RESEARCH COUNCIL Inc.

ANNUAL INDUSTRY SURVEY

2026

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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 2025/26 season was highly productive on a per hectare basis, with the industry recording its highest-ever average yield. However, total soluble solids per hectare were lower than the previous season. Growing conditions were generally favourable, although significant rainfall in March reduced yield and fruit quality in some areas. In the most affected fields, high mould levels or weed issues ultimately prevented harvest.

During the 2025/2026 season, eight growers produced 161,151 tonnes of processing tomatoes, significantly lower than the total delivered in 2024/25 (211,011 MT); again, the crop was processed by only two Australian processing companies.

Some 1,475 hectares were planted in total, with sub-surface drip irrigation used to grow all of it.

The use of transplants was similar to the previous year at 86% of the total area under production, with direct-seeded tomatoes making up the remaining 14%.

In 2025/26, the Australian processing tomato industry achieved an average yield of 117.6 tonnes per hectare, however due to some late season crop being abandoned, only 93% 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. The record average yields were therefore not surprisingly met this season with lower than ideal average solids of 4.75%.

*On the international scene, imports and exports are reviewed and discussed in the context of the **previous calendar year** (2025), not the abovementioned processing season (2025/26).*

Australian imports of processed tomato products, measured in raw tonne equivalent, decreased slightly in 2025. Despite this decline, imports remain at historically high levels, reflecting the continued impact of global oversupply on the Australian market and the resulting pressure on local processors and growers.

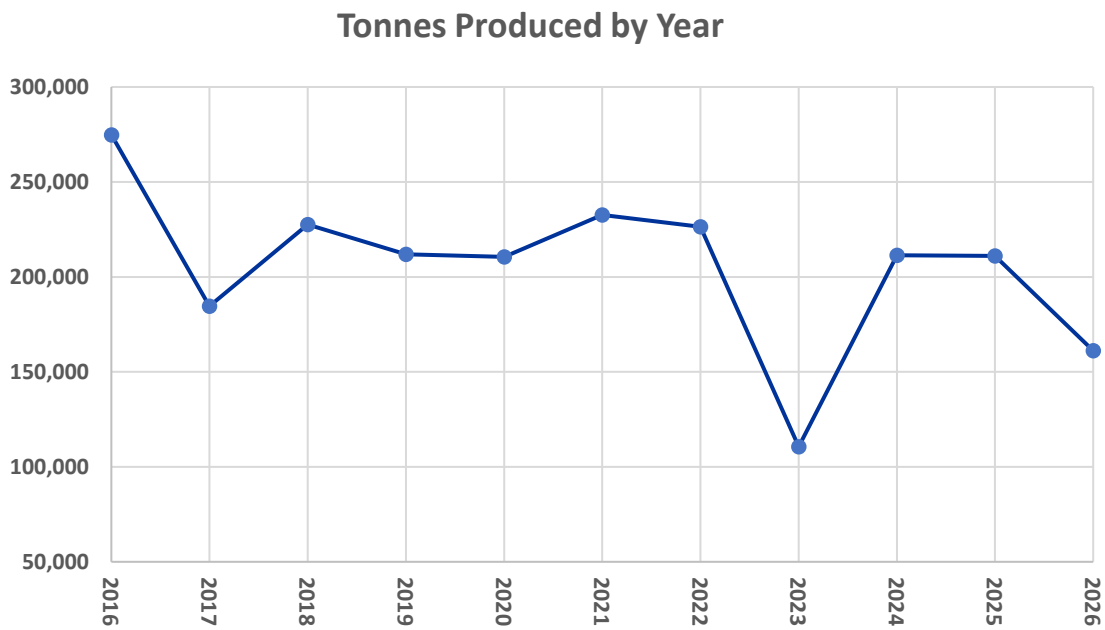
The exports of Australian processed tomatoes grew slightly higher again in 2025, however don't represent any significant new trend toward higher export market access.

Australian domestic consumption decreased substantially in 2025; however, this largely reflects unusually high volumes in the previous year, which skewed the year-on-year comparison. Consumption has now returned to levels more consistent with the long-term average.

Importantly, domestic demand was met by a combination of lower Australian production and higher imports. With domestic consumption equivalent to 674,834 tonnes of raw tomatoes, compared with current Australian production of approximately 150,000 tonnes, there is considerable scope to increase local production. Realising this opportunity will require stronger support for Australian-grown product from both the market and government.

2 Industry Size

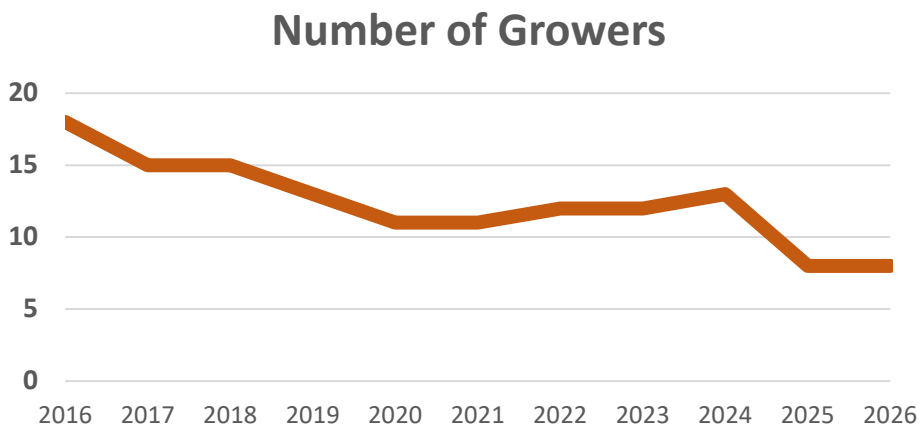
2.1 Volume



2.1.1 Paid tomato volumes delivered (tonnes) (APTRC)

Growers produced 161,151 tonnes of processing tomatoes during the 2025/26 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)

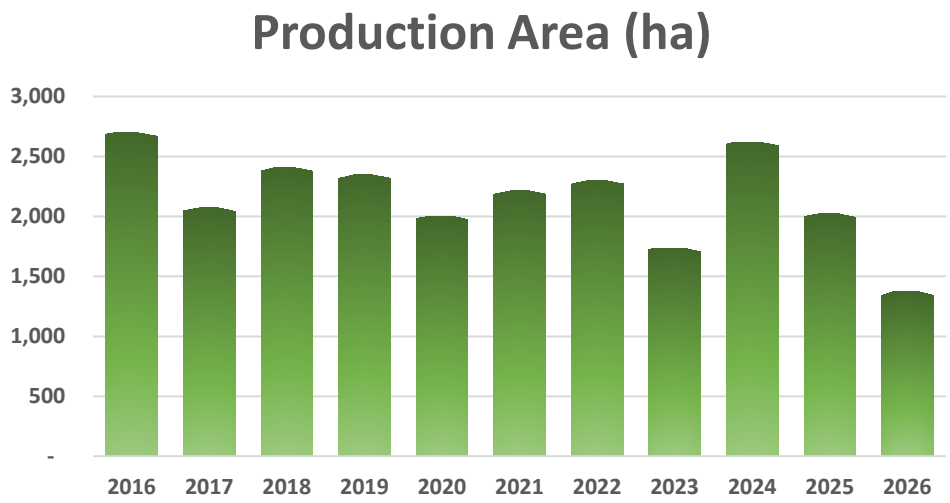
There were 8 specialist businesses producing for the 2025/26 processing tomato season, with the majority grown across Northern Victoria, and a lesser amount grown in Southern NSW.

2.3 Processors

This season, Kagome took 92.3% of the total crop and SPC 7.7%, which is a much lower than traditional percentage for SPC.

3 The Crop

3.1 Area and management



3.1.1 Planted production area (ha) (APTRC)

The planted production area fell to 1,475 hectares in 2025/26, of which 93% was harvested. This represents the lowest planted area in more than 30 years of available industry records. A recovery in Australian production will depend on stronger support for locally grown product from supermarkets and government, together with an easing of global oversupply and the resulting pressure from low-cost imports.

Season		Transplanted	Seeded
2010/11		79%	21%
2011/12		81%	19%
2012/13		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%
2025/26		86%	14%

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

This season, the crop was all grown under sub-surface drip irrigation and direct seeding increased only slightly.

Area and Production by State	VIC	NSW
Area Planted	81.4%	18.6%
Tomato Volume Processed	78.2%	21.8%

3.1.3 Production by State (APTRC)

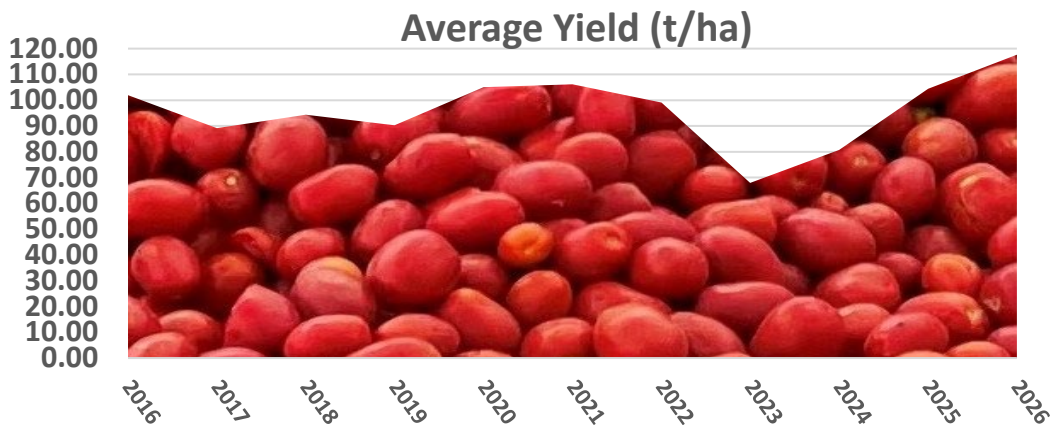
In the 2025/26 season, the proportion of total production by state did not align with the proportion of area planted. Victoria accounted for a lower share of production relative to its planted area, largely due to late-season rainfall affecting several farms. This resulted in yield and quality losses, with some crops ultimately left unharvested.

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
2025/26	1475	1370	93%	117.6	Yields exceeded expectations as season had heat waves, hail and March rain.

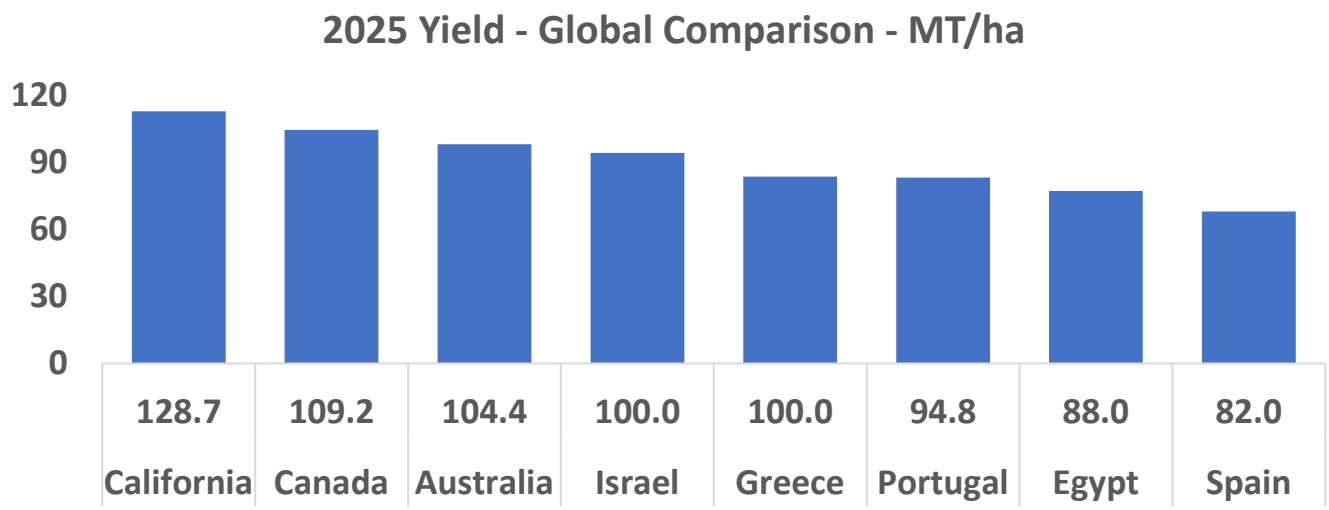
3.2.1 Average yield, harvest conditions (MT/ha) (APTRC)

Growers endured some growing challenges, including extreme heat, localised hail and heavy rain in March. However due to the limited planting area, the more favourable soils were selected by growers and resultingly higher yields were achieved.



3.2.2 Average yield (t/ha) (APTRC)

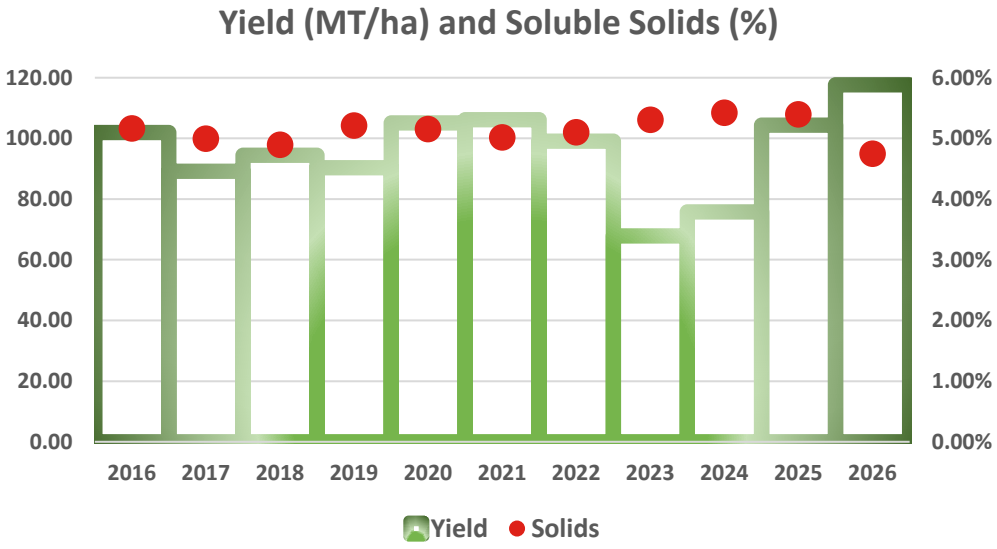
The industry achieved an average yield of 117.6 t/ha in the 2025/26 season—an exceptional result and the highest Australian average ever recorded.



3.2.3 2025 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 2024/25 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 4.75%, which is below the typical benchmark of 5.0% preferred by processors.

3.4 Cultivar

CULTIVARS	Percentage of Total Area Grown	
	2025/26	*2024/25*
H3402	**21.64%**	*33.20%*
UG16112	**20.58%**	*11.79%*
H1015	**18.85%**	*22.32%*
SVTM9018	**6.04%**	*0.21%*
H1014	**6.04%**	*4.52%*
H1311	**4.23%**	*5.10%*
SVTM9025	**3.62%**	*2.69%*
SVTM9024	**3.23%**	*1.37%*
SVTM9000	**3.19%**	*7.90%*
UGMIX	**2.85%**	*2.77%*
H3406	**2.63%**	*0.00%*
UG29814	**2.54%**	*0.10%*
HM58841	**2.44%**	*0.10%*
H1281	**0.93%**	*0.37%*
H1657	**0.72%**	*0.17%*
SVTM9023	**0.47%**	*1.83%*
HM58811	**0.01%**	*0.65%*
H1301	**0.00%**	*4.22%*
SVTM9300	**0.00%**	*0.16%*
Eventus	**0.00%**	*0.15%*
UG6617	**0.00%**	*0.15%*
H1884	**0.00%**	*0.10%*
SVTM9037	**0.00%**	*0.08%*

3.4.1 Cultivar by proportion of total area

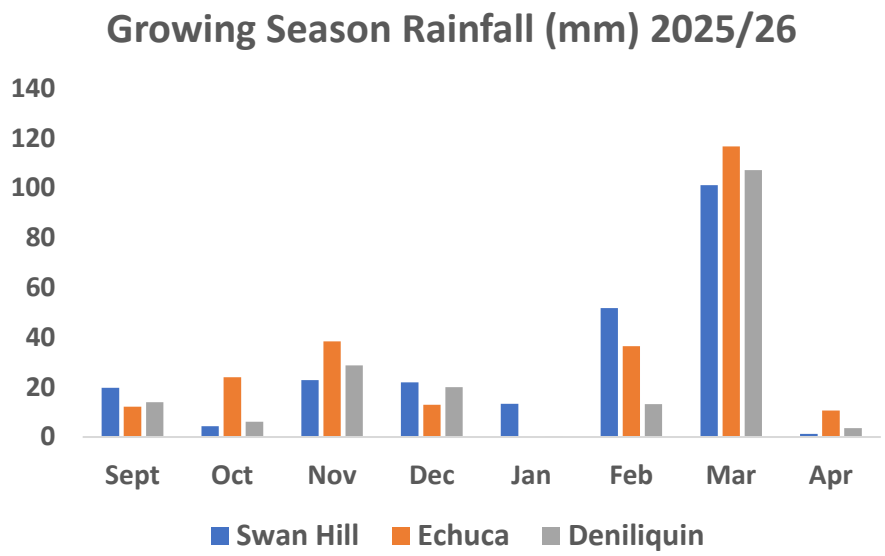
When comparing the 2024/25 and 2025/26 seasons, the most notable shift among the major cultivars was the increased planting of UG16112. This is significant given H3402 has been the industry's dominant cultivar for many years but is now close to being overtaken by newer-generation cultivars from other suppliers.

A total of 17 cultivars were planted commercially in 2025/26, fewer than the previous season, although this should be considered in the context of the overall reduction in planted hectares. 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 now far more 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

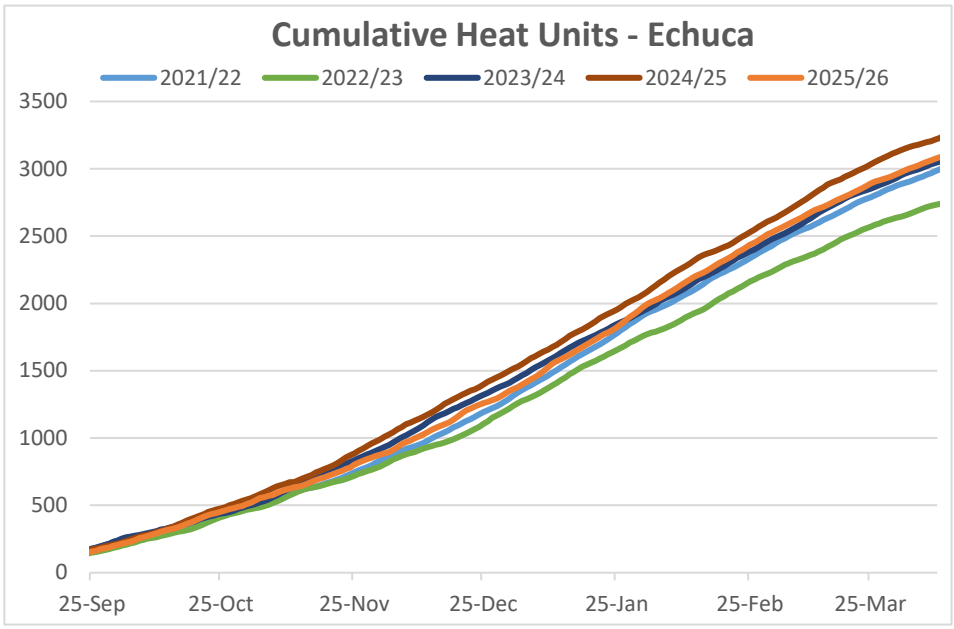
4.1 Rainfall



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

Rainfall was generally low across most regions until February, before increasing significantly in March. The March rainfall affected fruit quality in some areas, delayed harvest and, in some cases, resulted in fruit being left unharvested in the field.

4.2 Heat Units



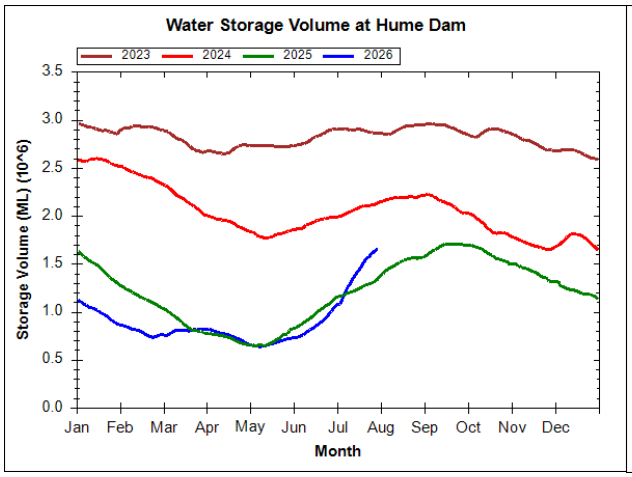
4.2.1 Heat units – Echuca (BOM)

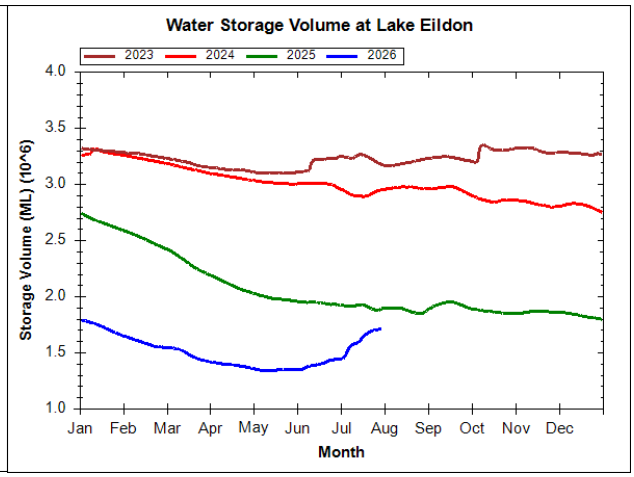
The heat units recorded during the major crop growth period demonstrate that the early season was on par with previous seasons, however increased significantly during January when heat waves assailed the industry.

4.3 Water Storages

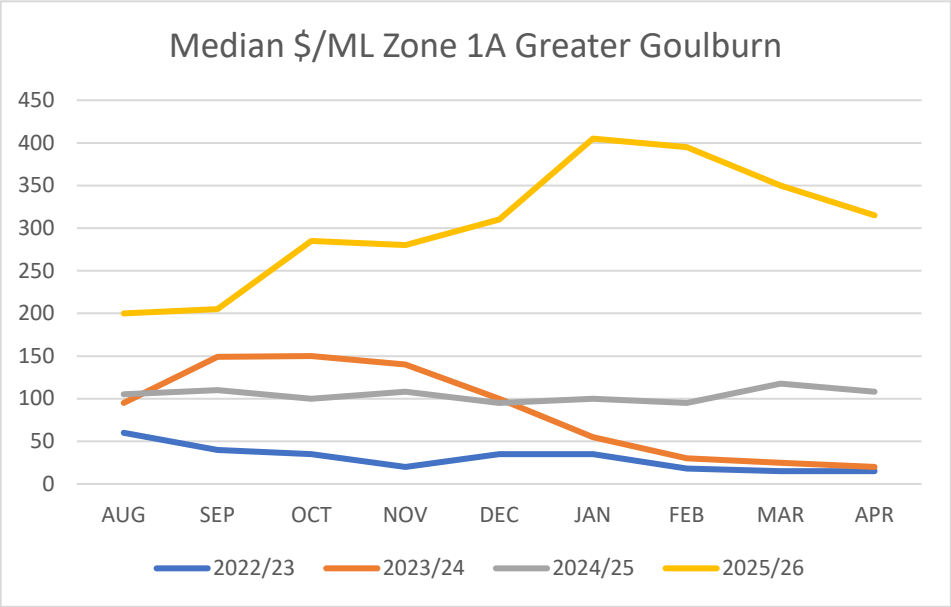
4.3.1 Storage Volume, Lake Eildon and Hume Dam (GMW)

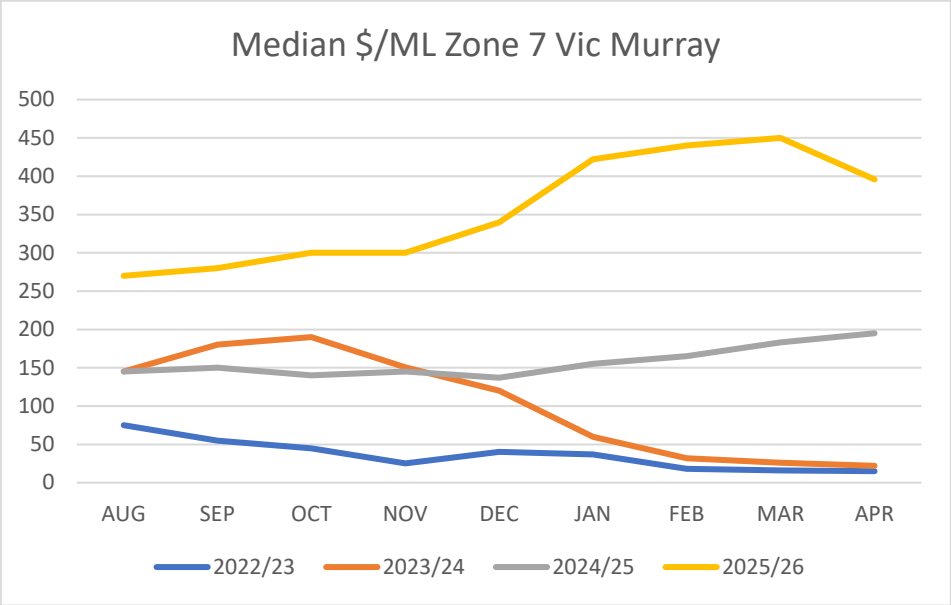
The water storage level in Hume and Eildon dropped off dramatically during the growing season, however during winter started showing promising signs of some re-charge.





4.4 Water Price





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

The price of water during 2025/26 began higher than the previous year, and continued to increase as the season progressed and storages were diminished through summer cropping usage and no recharge.

5 Trade

5.1 Imports

Product	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Dried/powder	34,506	37,934	37,660	34,880	28,017	29,143	34,263	26,638	28,767	30,537
Whole/pcs <1.14L	40,965	43,354	42,683	41,799	51,121	36,356	45,488	38,479	47,055	41,394
Whole/pcs >1.14L	22,997	24,002	24,275	22,369	21,129	21,316	24,029	18,908	23,420	22,900
Paste/puree<1.14L	102,733	107,923	109,578	110,328	159,447	137,971	125,751	147,343	183,182	184,830
Paste/puree>1.14L	130,171	140,532	144,906	133,524	143,118	140,502	187,046	203,539	197,038	186,251
Juice	83	38	75	50	30	17	47	27	19	15
Sauce/ketchup	38,462	45,705	45,946	47,050	48,375	45,788	51,585	58,092	71,376	74,816
Total Tomato	**369,917**	**399,488**	**405,123**	**389,999**	**451,236**	**411,093**	**468,210**	**493,026**	**550,857**	**540,744**

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

Total import volume eased in 2025. Volumes rose in Dried/powder, Paste/puree<1.14L and Sauce/ketchup but fell in all other categories.

Despite the decline, 2025 remained the second-highest import volume recorded since the industry began tracking data in 2010, only 1.9% below the record set in 2024.

The import level remains significantly higher than ideal and industry need this to reduce in order to improve our own local growing and processing potential through improved local market share.

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 61%, Israel 11%, China 11%
- **Whole/pcs <1.14L** – Italy 97%
- **Whole/pcs >1.14L** – Italy 96%
- **Paste/puree<1.14L** – Italy 79%, China 16%, Switzerland 1%
- **Paste/puree>1.14L** – China 41%, USA 39%, Italy 13%
- **Juice** – USA 58%, Mexico 26%, China 6%
- **Sauce/ketchup** – Italy 44%, New Zealand 18%, Spain 13%

At 64% of total volume (last year 62%), 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	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Dried/powder	6.95	7.18	7.24	7.02	7.70	6.46	6.80	7.67	7.98	6.95
Whole/pcs <1.14L	1.59	1.40	1.46	1.56	1.72	3.60	1.77	2.23	1.78	2.10
Whole/pcs >1.14L	1.20	1.13	1.21	1.24	1.24	2.45	1.39	1.89	1.84	1.77
Paste/puree<1.14L	1.75	1.62	1.59	1.73	1.94	1.84	1.97	2.44	3.01	2.39
Paste/puree>1.14L	1.49	1.38	1.44	1.53	1.62	1.43	1.65	3.95	4.50	1.88
Juice	1.15	3.04	2.25	2.30	3.82	3.95	3.20	3.68	4.71	4.49
Sauce/ketchup	2.26	2.24	2.24	2.35	2.71	2.57	2.50	2.88	2.84	2.87
Total Tomato	**1.71**	**1.62**	**1.66**	**1.75**	**1.91**	**2.52**	**1.91**	**2.83**	**2.84**	**2.30**

5.1.2 Average import prices ($/kg), in 2025 monetary values (ABARES)

5.2 Correlation between Imports and Price

Import prices declined across most product categories in 2025, with only Sauce/ketchup and Whole/pcs >1.14 L recording marginal increases. The largest price decline occurred in Paste/purée. Combined with sustained high import volumes in this category, this indicates that competitive pressure from imports on Australia's growing/processing sector remains significant.

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

- Juice displays a strong negative correlation, indicating that as prices drop, import volumes increase.
- 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.

In some cases, import prices and import volumes have increased at the same time. This does not necessarily mean that higher prices are driving more imports. A more likely explanation is that Australian product prices have increased faster, making imported products comparatively cheaper. This can encourage local buyers to purchase more imported product, even when import prices are also rising.

5.3 Exports

Product	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Whole/pieces	461	133	62	139	623	273	417	513	484	573
Paste/puree	104,518	21,852	16,402	11,695	32,766	38,323	22,032	9,085	3,725	3,803
Sauce/ketchup	4,039	8,799	11,636	13,227	14,788	17,986	13,660	5,661	18,504	22,390
Juice	57	50	80	106	52	47	118	112	167	295
Total Tomato	**109,075**	**30,834**	**28,180**	**25,167**	**48,228**	**56,629**	**36,227**	**15,371**	**22,880**	**27,061**

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

Overall export volumes increased again this season, though exports continue to represent only a very small share of Australia's total tomato production. The increase in the sauce/ketchup category is still the most notable export in this space.

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

- **Whole/pieces** – Thailand 61%, New Zealand 11%, USA 8%
- **Paste/puree** – New Zealand 49%, Thailand 40%, Ship and Aircraft Stores 4%
- **Sauce/ketchup** – New Zealand 36%, Japan 22%, China 12%
- **Juice** – New Zealand 72%, South Korea 11%, Singapore 4%

At 37% of all products (2024 was 33%), New Zealand increases it's share of Australian exports and remains the major export destination for Australian processed tomato produce, with Japan close behind at 20% and China at 11% of total exports.

Product	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Whole/pieces	6.31	8.22	5.85	3.21	2.07	3.61	4.06	3.23	3.30	2.95
Paste/puree	1.22	1.46	1.74	2.20	2.76	2.58	2.76	2.99	3.54	3.25
Sauce/ketchup	3.37	2.40	2.45	2.49	2.87	2.46	2.53	3.06	2.94	2.69
Juice	1.98	1.39	2.13	1.29	1.31	1.21	1.33	1.63	1.24	0.56
Total Tomato	**1.55**	**2.06**	**2.24**	**2.43**	**2.79**	**2.52**	**2.65**	**3.02**	**2.97**	**2.69**

5.3.2 Average export prices ($/kg) (ABARES), in 2025 monetary values

The real price of exports decreased again in 2025, which is not surprising, considering the current global glut of product in circulation and drop in prices globally.

The data suggests a moderate-weak negative correlation between average export price and volume exported, meaning that as price go down, volume exported goes up.

5.4 Market Demand

Calendar Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	5 yr	10 yr
Dom. Demand	534,691	553,336	604,579	576,793	613,485	587,025	658,422	588,276	739,327	**674,834**	649,577	613,077
Imports	368,918	399,488	405,123	389,999	451,236	411,093	468,210	493,026	550,857	**540,744**	492,786	447,869
Net Australian	165,773	153,848	199,456	186,794	162,249	175,933	190,212	95,250	188,470	**134,090**	156,791	165,207
Imported %	69%	72%	67%	68%	74%	70%	71%	84%	75%	**80%**	76%	73%
Local %	31%	28%	33%	32%	26%	30%	29%	16%	25%	**20%**	24%	27%
Per capita (kgs)	22	22	24	22	24	23	25	22	27	24	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 decreased slightly in the 2025 calendar year but remain significantly higher than the long-term average.

- **Net Australian:** The net Australian figure represents tomatoes processed in Australia, less exports, and provides an indication of how much locally produced product is supplying the domestic market. This figure declined significantly in the 2025 calendar year.

- **Domestic Demand:** Domestic demand represents the total volume of processed tomato products consumed in Australia. It declined only slightly in 2025, with most of the reduction resulting from lower Australian production rather than fewer imports, which unfortunately remained at historically high levels.

- **Imported %:** Imported processed tomato products have increased again and now account for 80% of total Australian demand. This highlights the growing reliance on imported product and the pressure facing Australia's processing tomato industry. Without stronger support for Australian-grown and processed products from local markets, retailers and government, there is a real risk that import levels will continue to rise and further displace domestic production.

- **Local %:** The share of Australian-grown product supplying the domestic market has fallen again, accounting for just 20% of total Australian demand. This is an undesirably low level and remains well below the long-term average.

- **Per Capita kgs:** Per-capita consumption remains closely aligned with the long-term average of around 24 kg of raw-tomato equivalent. The 5- and 10-year averages provide the clearest indication of underlying consumer demand and show that Australians continue to consume processed tomato products at consistent levels. The challenge is therefore not to increase overall consumption, but to increase the proportion of that demand supplied by Australian-grown and processed tomatoes.

6 Global Industry

6.1 Production

Recorded global production fell from 45.863 million tonnes in 2024 to 40.430 million tonnes in 2025, a decrease of approximately 13%. This decline was driven predominantly by a substantial reduction in Chinese production, with lower production levels in Spain and Turkey also contributing.

In 2025, Australia contributed 0.5% of global production, which moved its ranking down to 21th for industry volume.

Country	2023	2024	2025	% Change 2024-25	Ranking 2025	% Total 2025
California	11,556	9,999	10,537	5%	1	26.1%
Italy	5,404	5,272	5,840	11%	2	14.4%
China	8,000	10,450	4,900	-53%	3	12.1%
Spain	2,600	3,080	2,410	-22%	4	6.0%
Turkey	2,700	2,700	2,200	-19%	5	5.4%
Iran	2,000	1,400	1,800	29%	6	4.5%
Brazil	1,571	1,650	1,437	-13%	7	3.6%
Chile	1,150	1,300	1,340	3%	8	3.3%
Portugal	1,500	1,500	1,305	-13%	9	3.2%
Algeria	1,350	1,300	1,300	0%	10	3.2%
Tunisia	826	1,000	947	-5%	11	2.3%
Egypt	600	624	780	25%	12	1.9%
Russia	660	670	650	-3%	13	1.6%
Argentina	586	630	621	-1%	14	1.5%
Canada	520	493	608	23%	15	1.5%
Greece	390	510	515	1%	16	1.3%
USA excluding California	475	475	475	0%	17	1.2%
Ukraine	500	550	470	-15%	18	1.2%
Poland	250	400	400	0%	19	1.0%
Dominican Republic	227	227	227	0%	20	0.6%
Australia	**110**	**211**	**211**	**0%**	**21**	**0.5%**
Israel	197	184	191	4%	22	0.5%
France	160	168	186	11%	23	0.5%
India	162	162	162	0%	24	0.4%
Peru	150	150	160	7%	25	0.4%
South Africa	160	140	160	14%	26	0.4%
Morocco	100	100	100	0%	27	0.2%
Hungary	110	120	97	-19%	28	0.2%
Senegal	73	73	73	0%	29	0.2%
Serbia	21	13	42	223%	30	0.1%
Bulgaria	37	60	40	-33%	31	0.1%
Syria	40	40	40	0%	32	0.1%
Mexico	40	40	40	0%	33	0.1%
Thailand	40	40	40	0%	34	0.1%
New Zealand	25	39	37	-5%	35	0.1%
Czech Republic	25	25	25	0%	36	0.1%
Japan	26	26	22	-15%	37	0.1%
Slovakia	20	20	20	0%	38	0.0%
Venezuela	24	14	14	0%	39	0.0%
Malta	6	7	7	0%	40	0.0%
Nigeria			1	100%	41	0.0%
Total	**44,370**	**45,863**	**40,430**	**-13%**	**41**	**100%**

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

6.2 Outlook

- Looking ahead to the 2026/27 season, Australia's forecast has been further reduced to just 142,000 MT, to be processed by two processors. This significant reduction in contracted production reflects the ongoing impact of global oversupply and high volumes of imported product entering Australia. These conditions are placing intense pressure on local processors and Australian brands as they compete to maintain market share against lower-cost imports.

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