



European Supply Tightens Time to Rethink Your Sourcing

Secure your 2025 volumes now & lock in price to avoid 2026 shortages!

European Weather Challenges:

Adverse weather conditions across many parts of Europe are expected to reduce crop sizes in 2025, adding further pressure to regional supply.

Support from other Origins:

While California's bumper harvest contributes to global stability, European buyers gain little benefit due to import taxes. Instead, nearby regions such as Bulgaria, Turkey, and Egypt remain the most cost-effective alternative sourcing options.

Grower Hesitation:

Continued low raw material prices, following high levels of carry-over stock from 2024, have led to reduced planting activity.

Change in Grower's Strategy:

By reducing the planting activity of tomatoes, growers are trying to support an increase in raw material prices in 2026, allowing them to generate greater income from their crops.





Egypt

Overview:

- Transition period follows until 10–mid November before Nili crop harvest begins (mainly Sharkia, Beni Suif, Al-Fayoum, and limited quantities from Al-Minya, which peaks in the winter crop).

Forecast:

- Forecast remains unchanged at 780,000 tonnes.



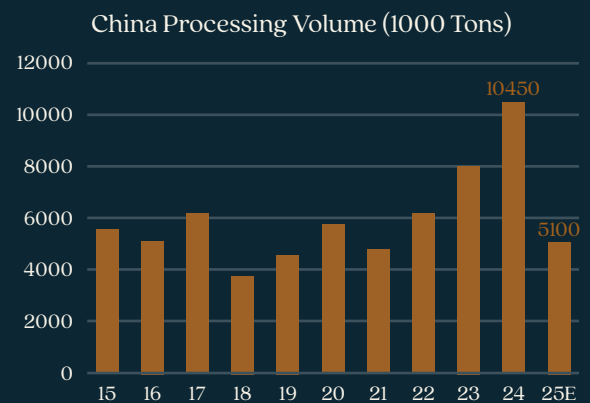
China

Overview:

- No major change in forecast so far.
- Likely to decline further, updated details expected soon.

Forecast

- Estimated 5.1m tonnes to be processed.



Greece

Overview:

- Harvest progressing smoothly, no issues reported.
- Central region (75% already harvested) expected to finish shortly.

Forecast

- Forecast remains at 450,000 tonnes.



Turkey

Overview:

- Southern region harvest completed 5 September.
- Bursa region: ~50% harvested; speed expected to increase over next 2 weeks (due to late planting bunching from high heat).
- Yields in later harvests are lower than expected.
- Konya region harvest ongoing.

Forecast

- Forecast reduced to 2.2m tonnes.

Portugal

Overview:

- Crop delayed: only ~30% processed so far.
- Irregular ripening: 25–30% green tomatoes left behind in some fields.
- Some fields are still too green, requiring delayed harvest; most delayed fields were flooded in April.
- Despite irregularity: good colour, brix improved from low early levels to above average now.
- Next 3 weeks crucial; harvest likely to extend into October (duration uncertain).

Forecast

- Forecast holds at 1.4m tonnes to 1.35m tonnes.

Spain

Overview:

- Harvest delayed: by 31 August, only 47% processed (vs. normal 63%).
- Extremadura: only 20–40% completed; harvest finishing around 10 October.
- Yields: down ~20% in Andalusia; variable but mostly lower in Extremadura.
- Brix levels are generally higher than normal.
- Weather: cooler now, but rain forecast for the weekend.
- No factories currently at full capacity.

Forecast

- Forecast reduced from 2.5 to 2.4 million tonnes; final outcome depends on September harvest.

Bulgaria

Overview:

- About 50% harvested; factories running at full capacity.
- Quality better than last year, with brix slightly above 5.
- Season expected to finish on target by the end of September.

Forecast

- Forecast unchanged at 43,000 tonnes.

Italy

Overview:

- **North:**
 - As of 24 August: 1.62 million tonnes processed, average brix 5.21, penalties 4.62.
 - Quality is good, but there are excess green tomatoes due to staggered ripening.
 - Heavy rains in late August caused non-harvest days and factory closures.
 - Yields below average despite record planting (45,000 hectares).
- **Centre-South:**
 - Factories at less than 50% capacity due to poor ripening.
 - Split maturation: some ripe fruit, many greens remain in fields.
 - Yields are the worst in 10 years after a strong start. Processors paying higher prices, especially for long varieties.
 - Extended crop season: 15 July – early October.

Forecast

- Total national forecast reduced from 5.8 to 5.5 million tonnes, pending September conditions.

Brusco's Tomato Ingredients

Product	Format	Packaging
CRUSHED	BRIX: 10/12, 12/14, 14/16	20KG BIB X 60 210-245KG DRUMS X 4 1100-1500KG IBC
DICED	14MM	
PASSATA	BRIX: 8/10, 10/12, 12/14	
PASTE	COLD BREAK/HOT BREAK BRIX: 28/30, 36/38	
PIZZA SAUCE	STANDARD & BESPOKE RECIPES	
POWDER	SPRAY DRIED	25KG X 40

Meet our tomatoes Category Manager, *Sara Farrow*

Sara has extensive knowledge of the tomato market across multiple origins. She is always happy to share her insight and provide updates on the latest market developments.

Please get in touch with Sara if you would like to talk about tomatoes.

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Next Steps:

Now is the time for customers to consider alternative sources like Bulgaria, Turkey, and Egypt, which offer more reliable and cost-effective options. These countries avoid the import costs of California and provide quicker lead times with fewer logistics risks, given their proximity to Europe.

Diversifying your sourcing helps protect against regional shortfalls and price spikes. At Brusco, we can help you navigate this transition and ensure a stable, competitively priced supply.

Share your volumes now with Sara for the 2025 season so we can ensure a stable supply, secure the best pricing and avoid potential issues in 2026.





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