



Supply Stabilises - Now's the Time to Buy Smarter, Not Faster.

The 2026 tomato season is looking more stable, but it's not necessarily any easier to navigate.

After a couple of years swinging from oversupply to correction, things have settled down. There's enough product in the market, just not the excess we've seen before. That gives buyers more options but also means being more considered about where you buy from, what you pay, and who you work with.

Take Your Time, But Plan Properly

Unlike previous years, there is less pressure to rush decisions.

- More time to benchmark suppliers and origins
- Greater ability to compare pricing and value
- But reliable supply still needs forward planning

A More Balanced Global Market

The market is balanced, with supply and demand more aligned.

- Global production holding around 39–40 million tonnes
- Well below the oversupply years of 2023 and 2024
- Buyers continuing to diversify sourcing across regions

Pricing: More Opportunities Emerging

The pricing environment is starting to ease in certain areas, but not everywhere.

- Prices expected to be flat to slightly softer overall
- Continued pressure on higher-cost regions like Europe
- More competitive offers from alternative origins

Supply Is There, Just Not All in One Place

Global volumes are stable, but supply is more spread out.

- Growth in Egypt and Turkey
- Lower output in parts of Europe
- China increasing, but not enough to shift pricing significantly

Europe: Reliable, But Expensive

Europe remains a key sourcing region, but cost pressures continue to build.

- Reduced planting in recent seasons
- High energy and fertiliser costs
- Ongoing weather-related risks

This continues the trend seen in 2025, where weather and reduced planting tightened regional supply





Spain

Key points:

- Strong winter rainfall — reservoirs now full, ensuring multi-year water security
- Good planting conditions with no early-stage weather risks
- Input costs (fertiliser, energy, transport) remain high for growers
- Stable pricing agreed despite cost pressures

Forecast:

2.75 million tonnes (slightly below 2025)
~€107/tonne (ex-field)

Italy

Key points:

- Strong water availability in the North following a wet winter, supporting good crop development.
- Water availability in the Centre-South has significantly improved after heavy rainfall, with key reservoirs such as the Occhito dam now at high levels (over 200 million m³), reducing irrigation concerns in regions like Puglia this season.
- Prolonged raw material negotiations reflecting rising input costs
- Exposure to geopolitical risks (e.g. Hormuz) impacting fertiliser and fuel costs

Forecast:

5.8 million tonnes (in line with 2025)
~€137/tonne (ex-field) (both North & South)

Ukraine

Key points:

- Planting and nursery activity progressing as planned
- High fertiliser and energy costs impacting economics
- Ongoing conflict continues to limit operational stability
- Forecast subject to revision depending on conditions

Forecast:

Likely downward revision

Portugal

Key points:

- Flooding earlier in the season impacted fields near the Tagus river
- Spring weather improving, supporting recovery
- Transplanting slightly delayed but progressing
- Final yields will depend on how well fields recover

Forecast:

1.3 million tonnes (in line with 2025)
~€106–107/tonne (ex-field)

Greece

Key points:

- Planting progressing well across key regions
- Ongoing cost pressure from energy and fertilisers
- Government support helping, but not fully offsetting increases
- Reduced planted area due to profitability concerns

Forecast:

450,000 tonnes (-14% vs 2025)
~€115/tonne delivered (raw material price)





Egypt

Key points:

- Significant Middle Eastern investment in infrastructure is expected to strengthen Egypt's supply capabilities and market position in the coming years
- Stable growing conditions with no major weather concerns
- Established irrigation systems supporting consistent yields
- Harvest begins in May, offering early season availability
- Increasing export focus as European supply tightens
- Continued lobbying by established European producers to limit Egyptian supply could impact availability
- Production is predominantly focused on paste for export markets

Forecast:

800,000 tonnes (in line with 2025)



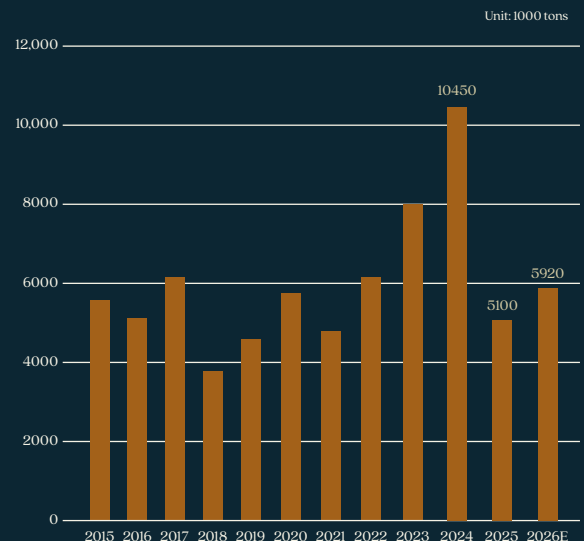
China

Key points:

- Planted area at ~50,670 hectares
- Growers remain cautious due to recent market volatility
- Production increasing vs 2025, but still below peak years
- Strong influence on global paste availability

Forecast:

5.92 million tonnes (↑ vs 2025)



Chile

Key points:

- Heavy rainfall mid-March disrupted key growing regions
- Some factories operating at reduced volumes early in the season
- Full impact on yields and quality still unclear
- Season outcome highly weather-dependent
- Due to the Chilean harvest season running from January to April, product availability is limited until the new harvest begins in January 2027

Forecast:

1.2 million tonnes





California (USA)

Key points:

- Planting began in February under favourable conditions
- Warmer March temperatures supported strong early growth
- Minor planting pauses due to heat, but no material impact expected
- Lower-than-expected winter rainfall
- Reduced water allocations anticipated in some regions
- Lower acreage this season offsets water constraints, but no impact on planted area

Forecast:

Production expected to be slightly lower year-on-year due to reduced acreage

Yield outlook remains stable given good early crop development



Next Steps

This is not a shortage market, it's a decision-driven market. You have more options than last year, but also more variables to manage.

Avoid locking in too early, instead talk to the team today about your volumes so we can find the right solution for you and your production by:

- Benchmarking across origins
- Use competitive regions to manage cost
- Keep flexibility as the season develops

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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