

PROCESSED TOMATOES

MARKET UPDATE MAY 2026

The processed tomato market enters the 2026 campaign in a relatively balanced position, following supply adjustments during the 2025 crop. Global production remains stable at approximately 39–40 million tonnes, with supply and demand largely aligned across major regions. However, beneath this stability, the market is evolving. Pricing is increasingly driven by cost pressures rather than raw material availability, and overall volatility is rising. Smaller disruptions are now having a greater impact than in previous years.

Cost inflation remains the dominant theme. Packaging costs have increased by approximately 15%, alongside notable rises in plastics, aluminium, inks and adhesives. At the same time, energy continues to be the largest uncertainty for processors, with geopolitical developments limiting visibility on future costs. As a result, even where raw material prices are stable or slightly lower, finished product pricing remains firm due to conversion and input cost pressures.

Italy

Stable supply with slight raw material easing, but ongoing cost pressure

Production is expected to remain in line with last year (~5.7m tonnes), with raw material prices agreed at around €137/mt (↓ ~4% YoY). Stock levels are balanced following weaker previous crops, and quality remains strong. Water availability is generally stable, although some regional concerns persist in the south.

Greece

Reduced contribution to overall European supply

Production is expected to decline to around 450,000 tonnes, reflecting ongoing structural pressure in the sector.

Portugal

Stable outlook with short-term uncertainty until contracts are finalised

Negotiations with growers are still ongoing, limiting visibility on final volumes. At present, production is expected to remain around last year's level.

Turkey

Recovery potential with improving supply outlook

Following a reduced 2025 crop, production could recover if farmer pricing expectations are met. Lower returns from competing crops are likely to support planting.

Spain

Potential volume recovery, but margin pressure remains across the chain

The 2026 crop has started under normal conditions, with transplanting progressing well. Early estimates suggest production of ~2.6m tonnes (+8–10%), assuming improved yields. Raw material pricing remains flat, but growers are facing increasing pressure from input costs. Some localised weather risks (excess rainfall) could impact crop timing.

Egypt

Consistent and reliable supply base

The winter crop is currently being processed with good quality, while the summer crop is progressing in line with expectations. Production is forecast at ~800,000 tonnes.

Other Origins (Global Market Influence)

Outside of Lupa's core sourcing regions, several major producers continue to shape the global balance.

- The USA (California) is expected to see a reduction in planted area, creating some uncertainty around final output
- China's production remains below peak levels seen in earlier years, contributing to a tighter global balance
- Iran remains a geopolitical wildcard, with limited visibility on production and trade flows

These regions collectively account for a significant share of global production and therefore play a key role in setting the overall supply-demand balance and price direction.

Conclusion

Supply across major regions is broadly stable and early crop conditions are positive, but the key driver of the market has shifted to cost inflation, particularly energy and packaging. This means that even in the absence of supply shortages, prices are likely to remain firm and reactive to cost movements.

For buyers, relying on supply-driven price reductions may not deliver the expected outcome. Instead, a flexible and proactive sourcing strategy is recommended. With a wide portfolio of tomato products sourced across multiple origins we're well positioned to support customers with continuity of supply and origin flexibility in a volatile market environment.



For more information and assistance please get in touch!

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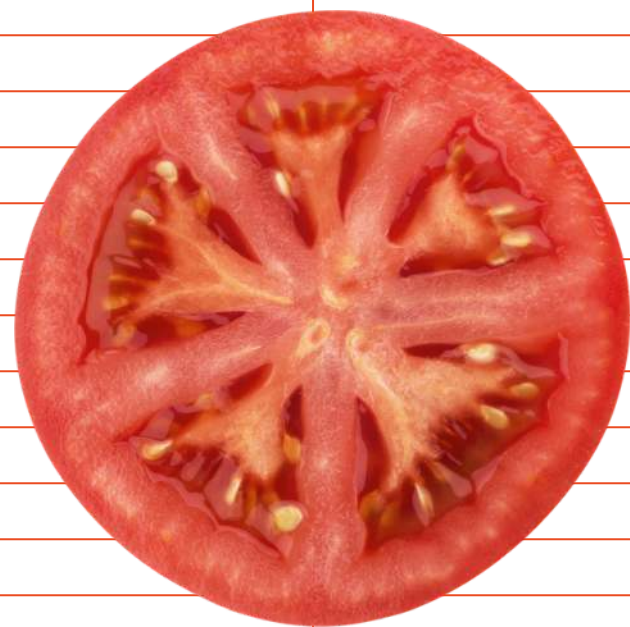

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PROCESSED TOMATOES

PRODUCT SHOWCASE

We offer a wide and flexible range of tomato products across multiple formats, origins, and specifications, designed to meet a variety of manufacturing and foodservice requirements. Whether you are looking for standard grades or more specialised, premium lines, our team can support you in identifying the most suitable solution. We encourage you to discuss your requirements with us, who will be able to guide you through the available options. Please find below a non-exhaustive overview of our current product range.

Product	Format	Weight	Origin	Origin	Origin	Origin
Tomato Paste 36/38	BIB	5/10/20/23kg	Egypt	Spain	Portugal	Turkey
Tomato Paste 28/30	BIB	5/10/15/20kg	Egypt	Spain	Portugal	Italy
Tomato Paste 36/38	DRUM	230 - 245kg	Egypt	Spain	Portugal	Turkey
Tomato Paste 28/30	DRUM	230 - 245kg	Egypt	Spain	Portugal	Italy
Tomato Passata 8/10	BIB	5/10/15/20kg	Egypt	Spain	Portugal	Italy
Tomato Passata 8/10	DRUM	210 - 235 kg	Egypt	Spain	Portugal	Italy
Tomato Polpa	DRUM	210 - 235 kg	Egypt	Spain	Portugal	Italy
Tomato Polpa	BIB	10/15/20kg	Egypt	Spain	Portugal	Italy
Diced Tomatoes 14mm	BIB	10/20kg	Spain	Portugal		
Diced Tomatoes 14mm	DRUM	210 - 220KG	Spain	Portugal	Italy	
Tomato Diced Roma	DRUM	210kg	Italy			
Crushed Tomatoes 14/16 BX	DRUM	210kg	Spain			
Crushed Tomatoes 12/14 BX	DRUM	210kg	Spain	Italy		
Crushed Tomatoes 6 BX	DRUM	210kg	Italy			
Polpa da Lungo	DRUM	210kg	Italy			
Tomato Powder	SACK	25kg	Spain			
San Marzano Plum Tomatoes	TIN	6 x 2.5kg	Italy			
San Marzano Polpa	DRUM	200KG	Italy			
Peeled Plum Tomatoes	TIN	6 x 2.5kg	Italy			
Sun-dried Tomato Sauce	POUCH	5x2.5kg	Italy			
Sun-dried Tomato Sauce	TIN	6x2.6kg	Italy			
Cherry Tomatoes (Pomodori)	TINS	6 X2.5kg	Italy			
Pizza Sauce	TIN/BIB/DRUM	Various	Italy	Spain	Portugal	Egypt



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PROCESSED TOMATOES

PREMIUM PROVENANCE

We also offer a Premium Tomato selection featuring specialized Italian varieties for top-tier and provenance manufacturing.

Premium Italian Varieties



Brix
~8

Datterino Tomato

High sugar content and low acidity for smooth, creamy, and sweet passatas, and shorter cooking.

Long Tomato (Roma / San Marzano Style)

Balanced sweetness and light acidity ideal for slow-cooked sauces and high-yield preparations.

Brix
~7



Brix
~7.5

Cherry Tomato (Pomodori)

A light, fresh profile perfectly suited for pulp, sauces, and quick-cook applications.

The Lupa Quality Edge



M&S A-List Accredited Supplier

Reflects the highest food safety, full traceability, and rigorous ethical sourcing compliance.

Northern Italy Provenance

All premium varieties are sourced from regions known for consistent quality and expertise.



Margin & Quality Differentiation

Premium varieties allow brands to balance cost with high-spec product positioning and perception.



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