

September 8th, 2025

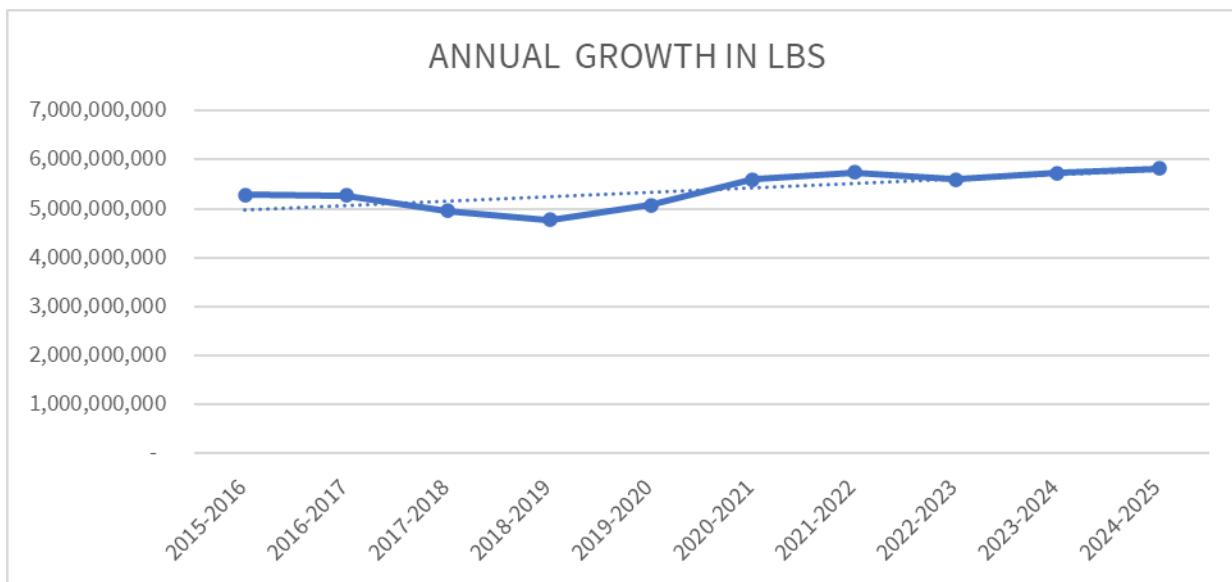
ANNUAL REPORT OF THE ROUND TOMATO MARKET IN THE UNITED STATES

The round tomato market in the last decade has gone through different changes, as it has had years of growth, as well as decline, in addition to the fact that the supply has diversified in terms of regions, but not all have achieved an outstanding position in the market share, because despite being a large market, It is also very competitive in terms of price, quality and availability throughout the year, which translates into a guarantee of supply.

This document presents the evolution of the round tomato market in the last decade, as well as a more specific focus between the years 2023 to 2025, as well as a comparison with the growth of Roma tomato consumption in the last ten years, as these markets are complementary, so they are intertwined.

In order to have the most up-to-date information possible, this report covers the period from September 1, 2024, to August 31, 2025

TOTAL ANNUAL VOLUME OF ROUND TOMATOES BETWEEN 2016 AND 2025



In the last decade, the tomato market has had a small growth, with an average of just over 1.02%. In the graph you can see that in the years 2017 to 2019 it entered a period of decline, which could be reversed until 2020 and that positive trend continued until 2022, in 2023 it had a slight setback, but in the last two seasons, it has had positive growth, although it is still very small compared to the growth of the total fruit and vegetable market, so it could be said that this category is losing share in the total market.

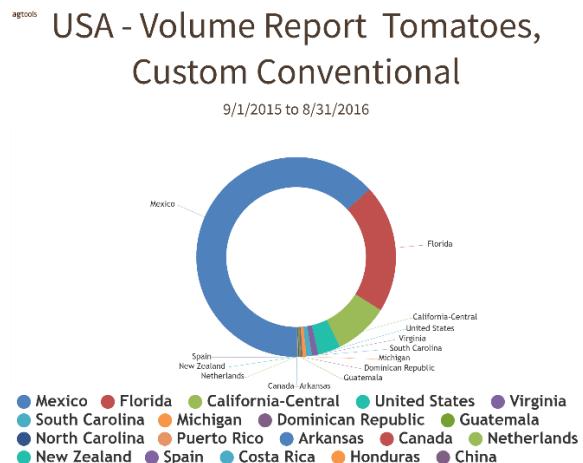
ANNUAL TOMATO VOLUME BETWEEN 2016 AND 2025

PERIOD	VOLUME LBS	GROWTH LBS	GROWTH %
2015-2016	5,281,283,210		
2016-2017	5,270,042,923	(11,240,287)	-0.2%
2017-2018	4,951,035,322	(319,007,601)	-6.1%
2018-2019	4,772,099,671	(178,935,651)	-3.6%
2019-2020	5,072,644,384	300,544,713	6.3%
2020-2021	5,601,963,018	529,318,634	10.4%
2021-2022	5,744,627,280	142,664,262	2.5%
2022-2023	5,601,733,431	(142,893,849)	-2.5%
2023-2024	5,728,458,117	126,724,686	2.3%
2024-2025	5,821,733,434	93,275,317	1.6%
AVERAGE ANNUAL GROWTH %			1.02%

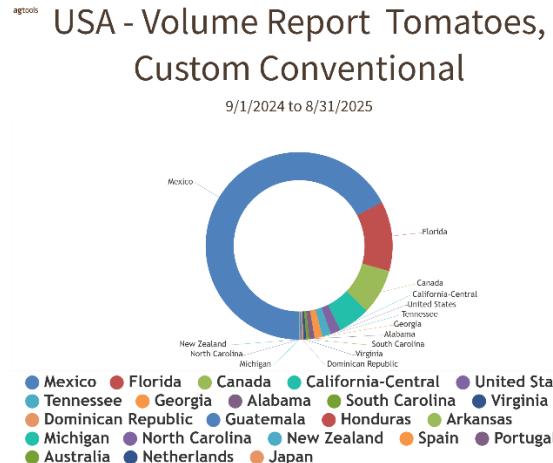
In this graph you can see how the total volume between 2016 and 2024 grew only 540 million lbs., which represented a total of just 10.2% in 10 years, that is, an average annual growth of only 1.02%, however, it should be noted that in 2019 this market reached its lowest volume of the decade by reaching only 4.772 billion lbs. and since that year it has practically registered a positive trend, although very small.

COMPARISON OF MARKET SHARES BY PRODUCING REGION IN 2016 AND 2025

2016



2025



As far as the supply areas are concerned, in the last decade they have increased from 19 areas in 2016 to 22 in 2025, however the main supply areas have not changed much, since in these years the most important change has occurred in the region of Canada, which in 2016 was in the 13th position. with an unimpactful volume, but this year its volume has grown remarkably so that it is already ranked as the third most important region, surpassing

Central California which, in this decade, although it only fell one position, its volume contracted drastically with-it losing market share.

GROWTH COMPARATIVE OF MAIN REGIONS OF TOMATOES IN 10 YEARS						
REGION	2015-2016	SHARE %	2024-2025	SHARE %	VAR 10 YRS LBS	VAR 10 YRS %
Mexico	3,322,174,210	62.9%	3,918,832,125	67.3%	596,657,915	4.4%
Florida	1,096,130,723	20.8%	700,243,163	12.0%	(395,887,560)	-8.7%
Canada	2,333,782	0.0%	454,535,491	7.8%	452,201,709	7.8%
California Central	476,174,400	9.0%	325,569,875	5.6%	(150,604,525)	-3.4%
Rest of the regions	384,470,095	7.3%	422,552,780	7.3%	38,082,685	0.0%
TOTAL (Lbs)	5,281,283,210	100.0%	5,821,733,434	100.0%	540,450,224	10.2%

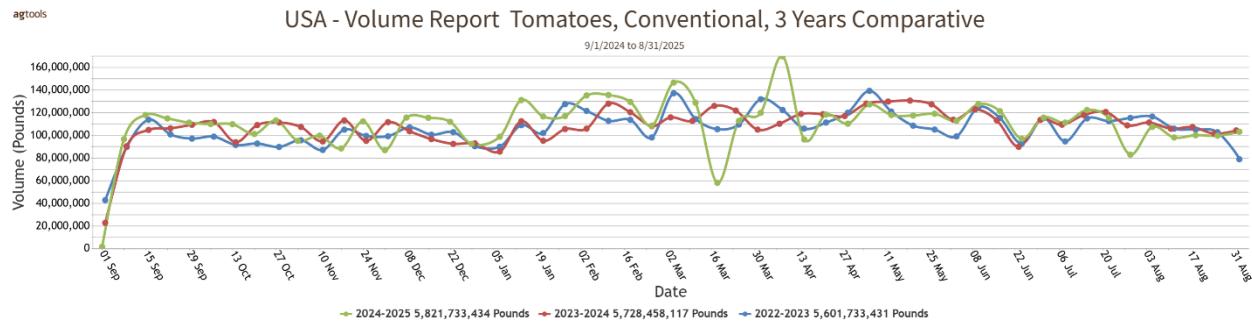
In terms of market distribution, after a decade, Mexico remains the main supplier region, with a growth higher than the total market and has also increased its share by more than 4%. Florida was the region that had the greatest setback, because in addition to having fallen 36%, it had a loss of market share of more than 8%. Canada was the region with the greatest change, reaching 7.8% market share, when in 2016 its volume was so small that it did not even reach 1%. Central California also had a sharp decline of more than 31%.

GROWTH OF THE MAIN REGIONS IN 2024-2025

GROWTH COMPARATIVE OF TOMATOES BY REGION BETWEEN SEPTEMBER 1ST 2024 AND AUGUST 31ST 2025						
REGION	2024-2025	SHARE %	VAR LBS	VAR %	2023-2024	SHARE %
Mexico	3,918,832,125	67.3%	192,668,784	5.2%	3,726,163,341	65.0%
Florida	700,243,163	12.0%	(126,478,647)	-15.3%	826,721,810	14.4%
Canada	454,535,491	7.8%	65,659,691	16.9%	388,875,800	6.8%
California Central	325,569,875	5.6%	29,161,735	100.0%	296,408,140	5.2%
United States	101,147,831	1.7%	(36,868,400)	-26.7%	138,016,231	2.4%
Tennessee	87,918,687	1.5%	(66,945,963)	-43.2%	154,864,650	2.7%
Georgia	78,789,044	1.4%	78,789,044	100.0%	-	0.0%
Alabama	55,382,485	1.0%	(12,037,580)	-17.9%	67,420,065	1.2%
South Carolina	28,343,517	0.5%	4,282,582	17.8%	24,060,935	0.4%
Virginia	27,664,164	0.5%	(18,662,945)	-40.3%	46,327,109	0.8%
Dominican Republic	17,048,555	0.3%	788,221	4.8%	16,260,334	0.3%
Rest of the regions	26,258,497	0.5%	(17,081,205)	-39.4%	43,339,702	0.8%
TOTAL (Lbs)	5,821,733,434	100.0%	93,275,317	1.63%	5,728,458,117	100.0%

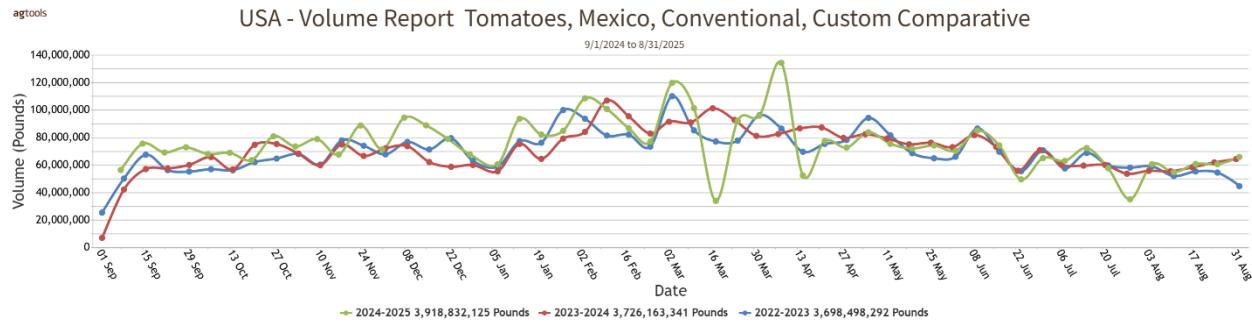
In reference to the supply of the market in the last twelve months, it can be seen that the market reached two million 640 thousand tons, a small growth of 1.63%. Within the main regions, Mexico grew 5.2%, while Florida had a contraction of 15.3%. Canada and central California also had positive results of 16.9 and 9.8 percent, respectively. The small regions of the United States and Tennessee were other regions with negative results. The small overall growth was a consequence of the mixed results of the supplier regions, in addition to the low demand that has been recorded in recent years.

3-YEAR COMPARISON OF WEEKLY VOLUME OF THE TOTAL TOMATO MARKET.



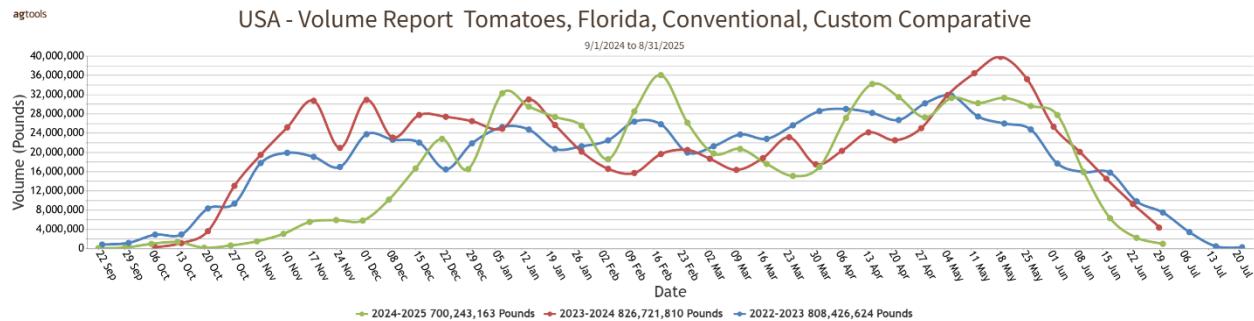
Regarding the performance of the market in the last three years, it can be seen that the weekly volume is very similar between the different years, however, in 2025 an unusual behavior stands out between the months of March and April, when a sharp drop in volume was recorded in the third week of March and a rebound in the second week of April. However, the total annual volume only registered a growth of 1.6%. Likewise, consumption throughout the year presents a certain stability with a slight increase in the spring months.

3-YEAR COMPARISON OF WEEKLY VOLUME OF TOMATOES FROM MEXICO IN THE UNITED STATES MARKET



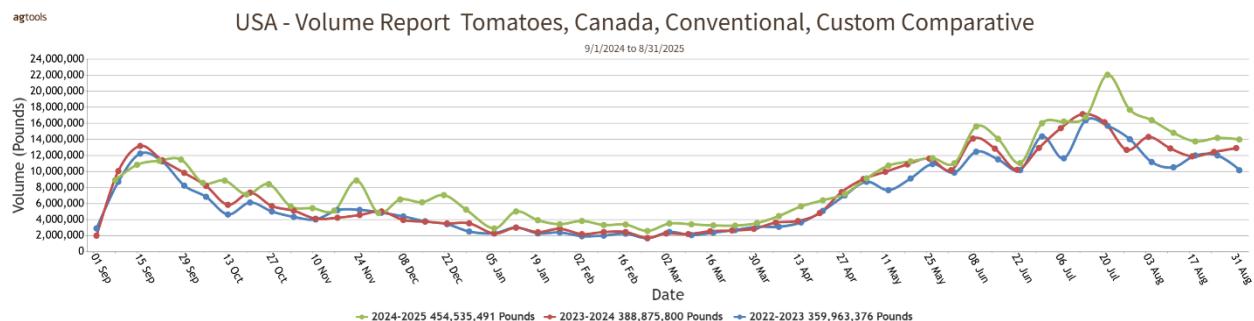
The region of Mexico is the one with the largest share in the market and therefore the one with the greatest impact on it, so a close relationship can be observed between the total behavior of the market and the behavior of this region, in addition to the fact that it has a year-round supply. The positive trend in volume between the months of September and March stands out, which is when it reaches its highest level and then begins a downward trend, reaching its lowest level in July. The growth observed in 2024 occurred in the months of February to June, achieving 1.3%, while for 2025 that growth from the beginning of the season to the month of April reached 5.2%.

3-YEAR COMPARISON OF FLORIDA TOMATO WEEKLY VOLUME IN THE U.S. MARKET



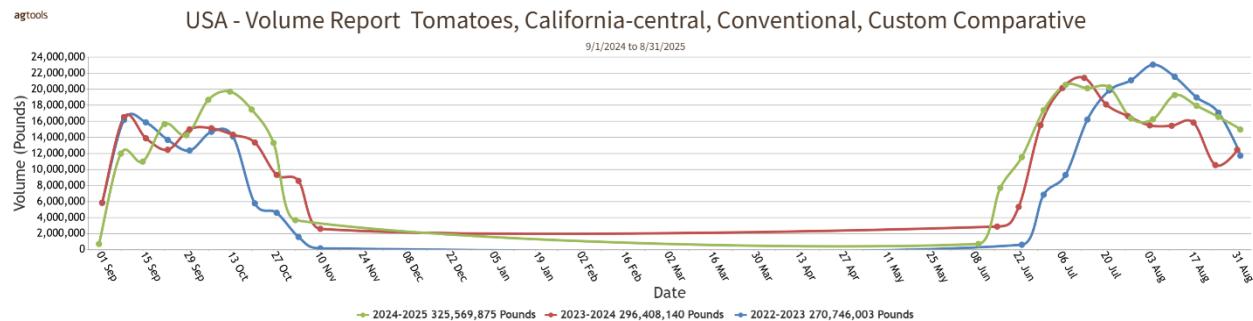
The Florida region has a long season, as its supply goes from October to July, reaching its highest level in the month of May. Between 2023 and 2024 it had a slight growth of 2.2% that occurred between the months of November and February and then between May and June. For the 2025 season it had a significant setback, as it fell 15.3% originated at the beginning of the season, since the first week of growth was presented until the month of January. Likewise, it had a quick end to the season and although it had a good volume in the months of February and April, they were not enough to counteract the effects.

3-YEAR COMPARISON OF WEEKLY VOLUME OF CANADIAN TOMATO IN THE UNITED STATES MARKET



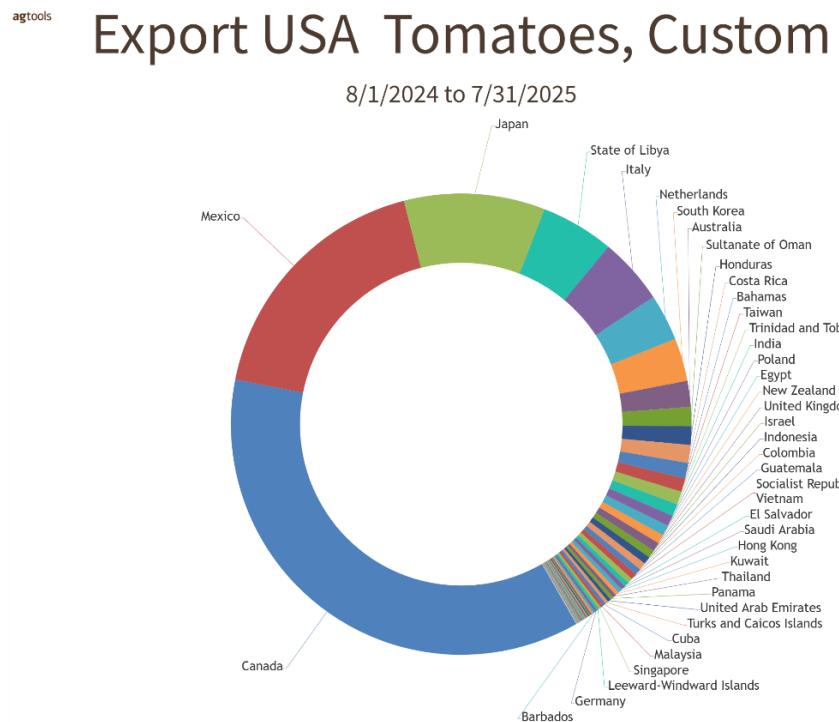
The Canadian region has a presence all year-round, but its highest production occurs between the months of April and November, reaching its highest level in July, while its lowest point is in February, but it does not cease to have a presence in the market. In the last three years, this production has had an important positive trend, since between 2023 and 2024 it had a growth of 8% caused by the reliable performance in the months of highest production. For the 2025 season, it had a strong increase of 16.8% as practically every week of the year it has shown growth, especially in the months of June to August, resulting in an increase of one percentage point in market share.

3-YEAR COMPARISON OF CENTRAL CALIFORNIA TOMATO WEEKLY VOLUME IN THE U.S. MARKET



Central California is the fourth largest region by volume contributed to the market. Its production runs from June to November, reaching its peak between July and August. In the winter and spring months it does not have a presence, however, it maintains an annual market share of 5.8%. Between the 2023 and 2024 seasons, it registered an increase of 9.4% caused by a strong start to the season in June and a late closure in November. For the 2025 season, the growth achieved was 9.8%, which indicates that it has maintained its growth rate in the last two seasons.

EXPORTING TOMATOES FROM THE UNITED STATES TO THE TOP 10 DESTINATIONS



Not only is the United States a country that consumes tomatoes, but it also holds a large share of the global market for fresh and processed tomatoes. As shown in this graph, between the months of August 2024 and July 2025, tomatoes were exported in different presentations to thirty-nine different regions in the world, the five most important in terms of market value being Canada, Mexico, Japan, Libya and Italy.

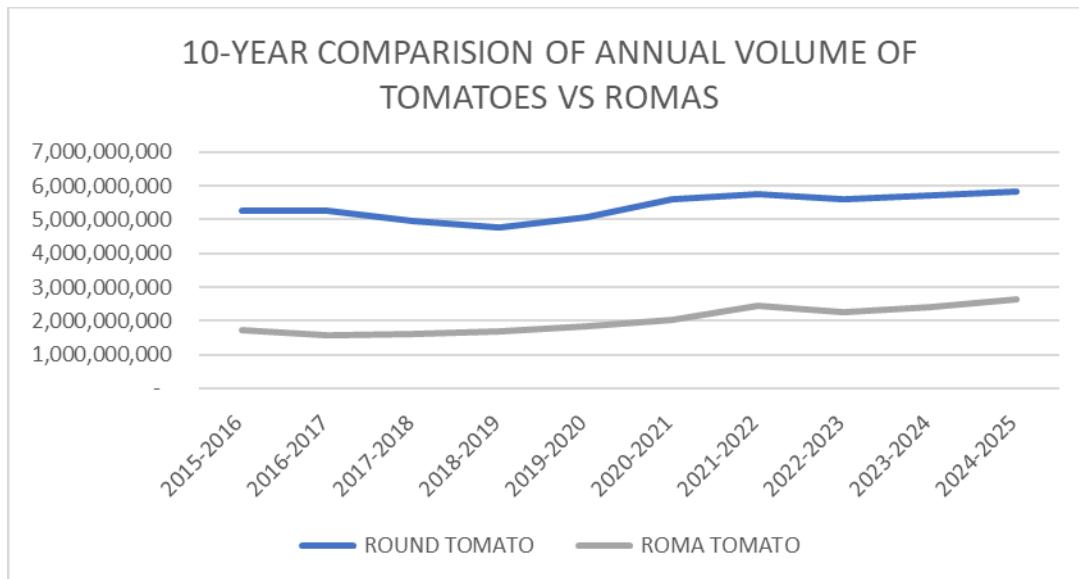
10 MAIN DESTINATIONS OF TOMATO EXPORTS		
REGION	VALUE (USD)	LBS
Canada	\$ 190,873,463	346,379,001
Mexico	\$ 93,572,044	196,533,711
Japan	\$ 51,852,033	99,921,028
Lybia	\$ 26,918,312	41,202,919
Italy	\$ 24,428,672	37,417,110
Netherlands	\$ 17,094,800	49,211,798
South Korea	\$ 15,777,717	43,708,802
Australia	\$ 9,516,472	28,607,265
Oman	\$ 7,038,000	15,260,441
Honduras	\$ 6,814,113	14,371,210

Canada is the main export destination for tomatoes in terms of value, reaching 190 million dollars. Mexico is in second place with a value of ninety-three million dollars. Japan is the third destination with an import value of fifty-one million dollars.

It is important to mention that a large number of these exports refer to processed tomatoes such as sauces or puree, but the portion of fresh tomatoes is also considered.

On the other hand, the consumption of fresh tomatoes in the United States has changed significantly, as the market has shifted its preference from round tomatoes to Roma tomatoes, as shown in the graph.

COMPARISON OF GROWTH OF THE TOMATO ROUND VS TOMATO ROMA MARKET IN 10 YEARS



In the last ten years, the differential between the round tomato market and the roma tomato has been narrowing, as the latter has shown a much higher growth rate than that of the round tomato. This is due to changes in consumer preferences, as well as in the markets, although each variety has different uses, the roma tomato has managed to position itself within consumer preferences.

PERIOD	TOMATO ROUND LBS	ANNUAL GROWTH %	TOMATO ROMA LBS	ANNUAL GROWTH %
2015-2016	5,281,283,210		1,717,576,565	
2016-2017	5,270,042,923	-0.2%	1,576,776,084	-8.2%
2017-2018	4,951,035,322	-6.1%	1,625,825,101	3.1%
2018-2019	4,772,099,671	-3.6%	1,673,393,504	2.9%
2019-2020	5,072,644,384	6.3%	1,850,841,808	10.6%
2020-2021	5,601,963,018	10.4%	2,012,799,535	8.8%
2021-2022	5,744,627,280	2.5%	2,445,271,604	21.5%
2022-2023	5,601,733,431	-2.5%	2,271,645,867	-7.1%
2023-2024	5,728,458,117	2.3%	2,411,513,896	6.2%
2024-2025	5,821,733,434	1.6%	2,621,229,863	8.7%
AVERAGE ANNUAL GROWTH %		1.02%	5.26%	

In the last ten years, the round tomato market has shown seasons of sharp decline, such as between 2016 and 2019, as well as significant increases such as in 2021, when it achieved a recovery of more than 10%, however, as a result of these ups and downs, the average for the decade is 1.02%. On the other hand, the Roma tomato market has had a few years of

decline and more years of growth, especially in 2022, when it reached an increase of 21.5%, so the average growth result of the decade is 5.26%, which is higher than that of the round tomato, which indicates a clear change in the market for this vegetable.

It is evident that the round tomato market is decreasing, because despite the fact that the result in ten years is positive, the total market in the sector exceeds 4% annual average, which indicates that this vegetable is not growing at the same rate as the market. It is of utmost importance to take this trend into account when planning future productions, because due to the large size of the market, a percentage point of change, either positive or negative, means large volumes that can be a surplus or a shortage in the market.

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