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Market Intelligence Report

Tomato Paste Market

Global, South African and Western Cape Overview

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TOMATO PASTE MARKET INTELLIGENCE REPORT

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Executive summary

Tomato paste is both a consumer product and an important intermediate input into sauces, canned foods, ready meals and other manufactured foods. This report provides market intelligence on global processing tomato production and tomato paste related trade, followed by the South African and Western Cape position. It distinguishes between total tomato production, processing tomato production and tomato paste related trade, as these represent different stages of the value chain.

Global tomato production reached 188.5 million tonnes in 2024, while the processing tomato crop reached 45.9 million tonnes before moderating to 40.4 million tonnes in 2025. The United States, Italy and China were the largest processing producers in 2025. Reported global HS 2002.90 export value amounted to approximately US\$4.50 billion in 2025, with China the largest exporter by volume and Italy the largest by value.

South African total tomato production declined to 486 000 tonnes in 2025, approximately 28% below the 2017 peak. South Africa recorded a processing tomato crop of about 160 000 tonnes in 2025, of which approximately 70 000 tonnes were produced in the Western Cape. Provincial data indicate comparatively strong Western Cape yields, with the decline in production between 2017 and 2023 associated mainly with reduced planted area rather than lower productivity.

South Africa remains a net importer of tomato paste related products. HS 2002.90 imports amounted to 21 979 tonnes in 2025, with China supplying 69% of import volume. More detailed customs data show that specifically defined bulk tomato paste lines accounted for about one third of this volume. Import demand should not, however, be interpreted simply as a shortage of domestic tomatoes. Product specification, processing requirements, international prices, exchange rates, plant capacity and downstream manufacturing demand all influence sourcing decisions. The distinction between hot break and cold break paste shows that sourcing requirements differ according to product specification and end use.

The Western Cape has an established processing base centred on Lutzville, although the smaller processing programme indicated for 2026 warrants further investigation. The market operates within a trade framework that includes a 37% general customs duty on relevant tariff lines, preferential treatment for qualifying origins and a full rebate for specified manufacturing uses, subject to applicable requirements. Further analysis should focus on imported paste specifications, processing economics, rebate utilisation and the conditions under which additional domestic production could be technically and commercially viable.

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Abbreviations

Term	Meaning
AfCFTA	African Continental Free Trade Area
EFTA	European Free Trade Association
HS	Harmonized System tariff classification
ITAC	International Trade Administration Commission of South Africa
ITC	International Trade Centre
MERCOSUR	Southern Common Market
NAMC	National Agricultural Marketing Council
NFPMS	National Fresh Produce Markets
SADC	Southern African Development Community
SARS	South African Revenue Service
TPO	Tomato Producers Organisation
WPTC	World Processing Tomato Council

1. Introduction

Tomato paste is produced by concentrating processing tomatoes through the removal of a substantial portion of their water. The resulting product is thicker and more concentrated than tomato purée or ordinary tomato sauce.

Tomatoes can be grown for different end uses, including processing. Processing tomato cultivars are selected for characteristics that influence product quality and processing efficiency, including soluble solids content, colour, firmness, disease resistance and suitability for harvesting and industrial processing.

Soluble solids are commonly measured as degrees Brix. Higher Brix generally means that more tomato solids are available per tonne of fresh tomatoes and that less water must be removed during concentration (NAMC, 2024a).

Tomato paste forms part of the broader processed tomato value chain and is used both as a consumer product and as an intermediate input in a wide range of manufactured food products. The value chain extends from primary tomato production and the production of tomatoes specifically for processing, through industrial processing, to processed tomato products, trade and downstream food manufacturing. The report follows these stages to provide context for the tomato paste market and to distinguish developments at different points in the value chain.

South Africa produces tomatoes commercially while also importing prepared tomato products, including tomato paste. For the purposes of this report, “processed tomato products” refers to trade classified under HS 2002.90, covering prepared or preserved tomatoes other than whole tomatoes or tomatoes in pieces. This category includes tomato preparations such as purée, paste and powder.

The assessment draws on complementary data sources covering production, processing, trade and policy information. WPTC provides the principal international source for processing tomato volumes, while South African statistical, administrative, industry and enterprise sources provide the domestic and Western Cape evidence. The analysis distinguishes between total tomato production, processing tomato production and tomato paste output. Further detail on the data sources, periods and limitations is provided in Appendix A.

2. Global trends

2.1 Global processing tomato production

Processing tomato production refers to tomatoes grown or contracted for industrial processing rather than final tomato paste output. Figure 1 places processing tomato production within the broader global tomato market by comparing WPTC processing volumes with total tomato production reported by FAOSTAT for which the latest available data extend to 2024.

Global processing tomato production declined slightly from 39.2 million tonnes in 2021 to 38.4 million tonnes in 2022, before recovering strongly to 44.2 million tonnes in 2023 and reaching 45.9 million tonnes in 2024. In 2025, processing volumes moderated to 40.4 million tonnes as growers and processors adjusted to market conditions, inventories and raw tomato price signals (WPTC, 2023; WPTC, 2024; WPTC, 2026a).

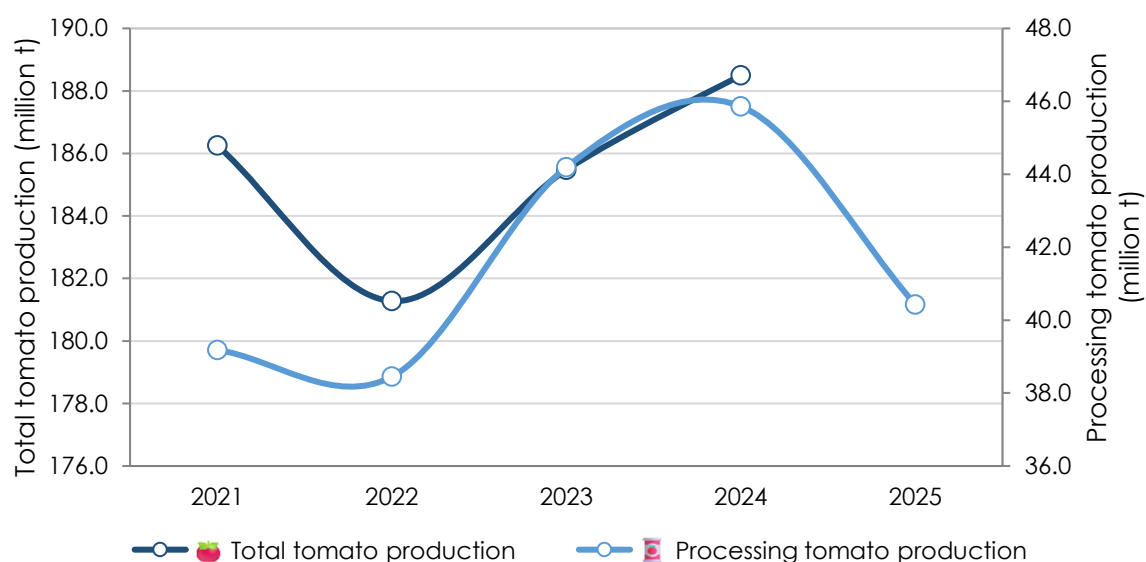


Figure 1. Global tomato production and processing tomato production, 2021 to 2025

Source: FAOSTAT (2026), Crops and livestock products: Tomatoes; World Processing Tomato Council (WPTC) World Production Estimates (2023, 2024 and 2026a).

As shown in Figure 2, production is concentrated in a relatively small number of countries. When California and the rest of the United States are combined, the United States was the largest processing tomato producer in 2025, followed by Italy and China. Spain, Türkiye, Iran, Brazil, Chile, Portugal and Algeria also formed part of the major global processing base.

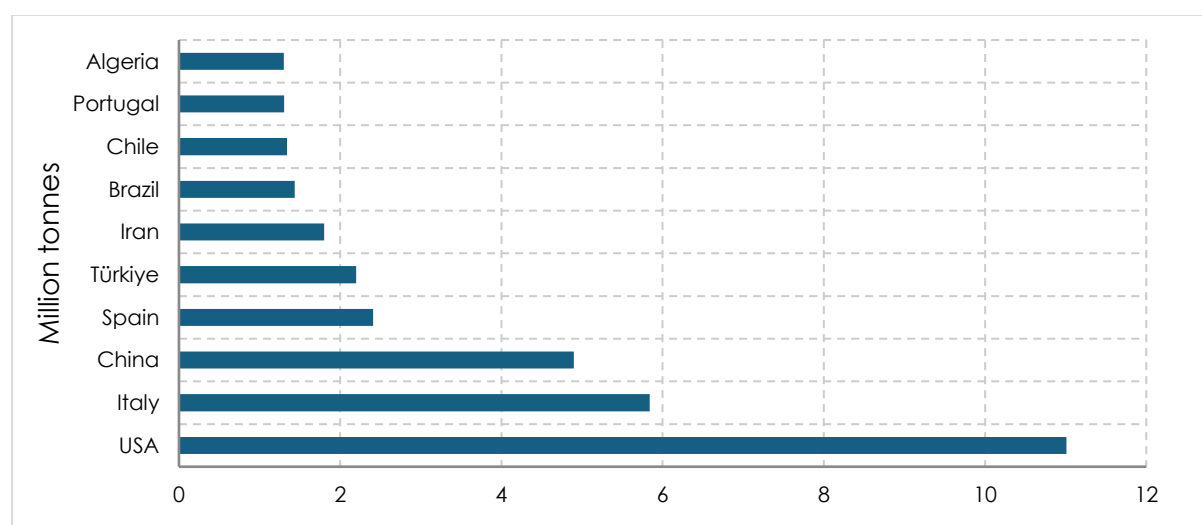


Figure 2. Major processing tomato producers, 2025

Source: World Processing Tomato Council (2026a). United States components combined for country comparison.

2.2 Global tomato paste related trade trends

At the processed-product stage of the tomato value chain, trade in processed tomato products (HS 2002.90) provides a consistent historical indicator for tomato paste-related trade. The classification includes tomato paste as well as certain other prepared tomato products. As shown in Figure 3, global export value increased from about US\$3.25 billion in 2016 to US\$4.50 billion in 2025, equivalent to an average annual growth rate of approximately 3.7%. Trade value rose particularly strongly after 2021, reaching about US\$5.44 billion in 2023 before moderating in 2024 and 2025 (ITC Trade Map, 2026).

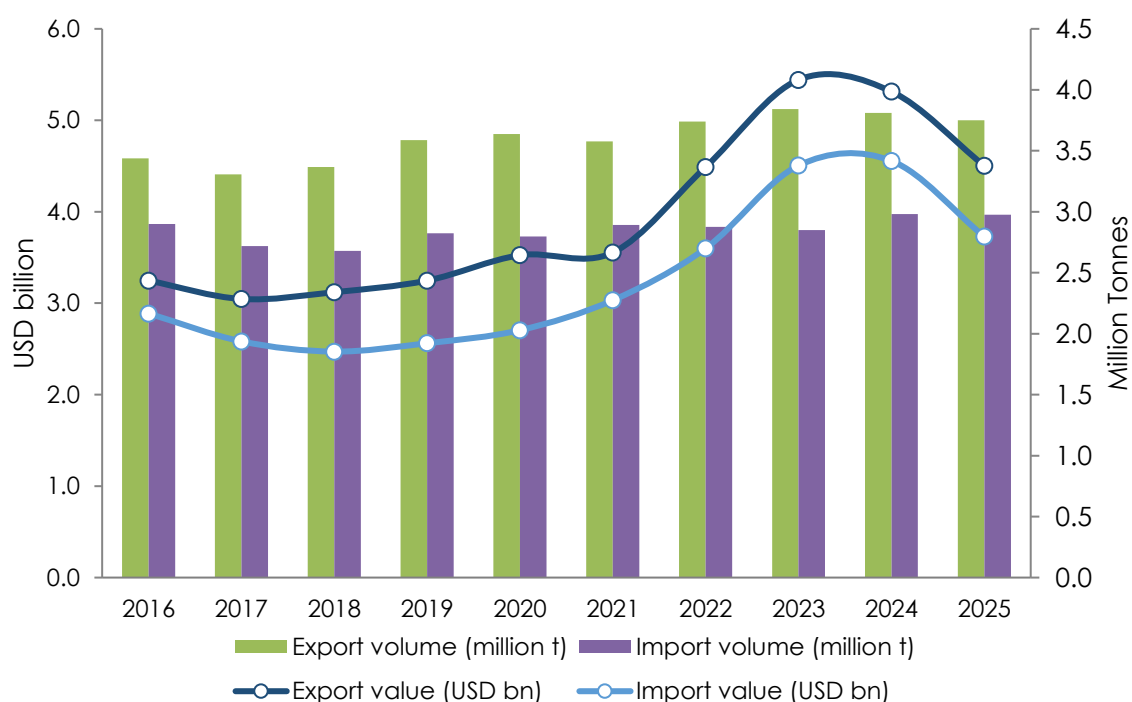


Figure 3. Global processed tomato product trade: value and volume, 2016 to 2025

Source: International Trade Centre Trade Map (2026), HS 2002.90. Values are nominal United States dollars.

More specifically, Figure 4 shows the volume trends for selected major exporters of processed tomato products (HS 2002.90). China was the largest exporter by reported volume, with exports rising sharply after 2021 and remaining at around 1.2 million tonnes annually between 2023 and 2025.

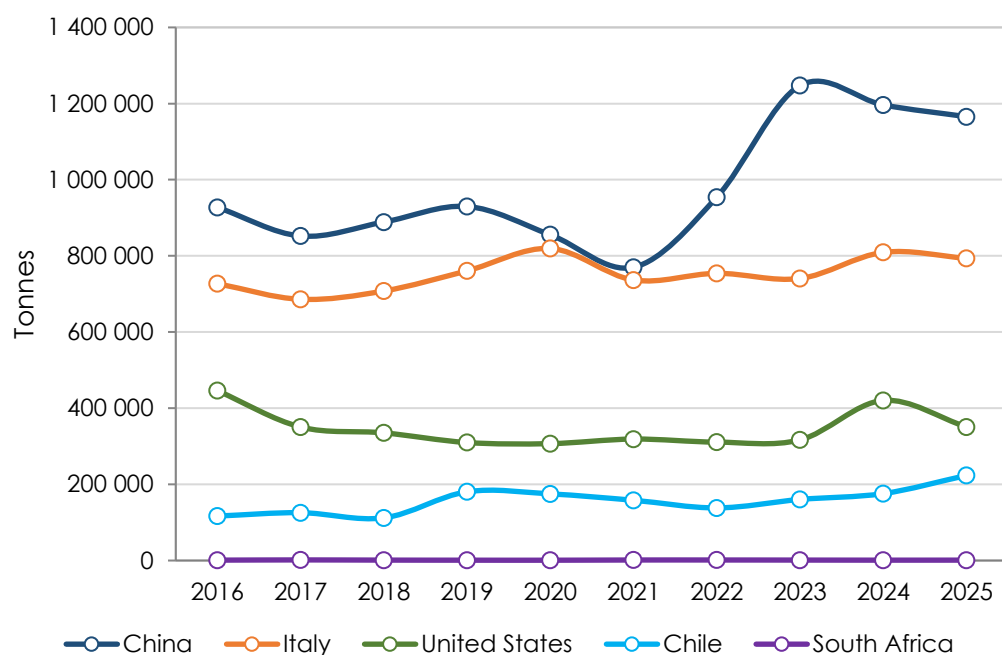


Figure 4. Selected major processed tomato product exporters by volume, 2016 to 2025

Source: International Trade Centre Trade Map (2026), HS 2002.90. Selected exporters with complete annual quantity observations.

Figure 5 shows selected major importers of processed tomato products (HS 2002.90) by volume. Germany recorded the largest import volumes, followed by the United Kingdom and Italy, while South Africa's imports remained comparatively small at around 20 000 to 30 000 tonnes per year.

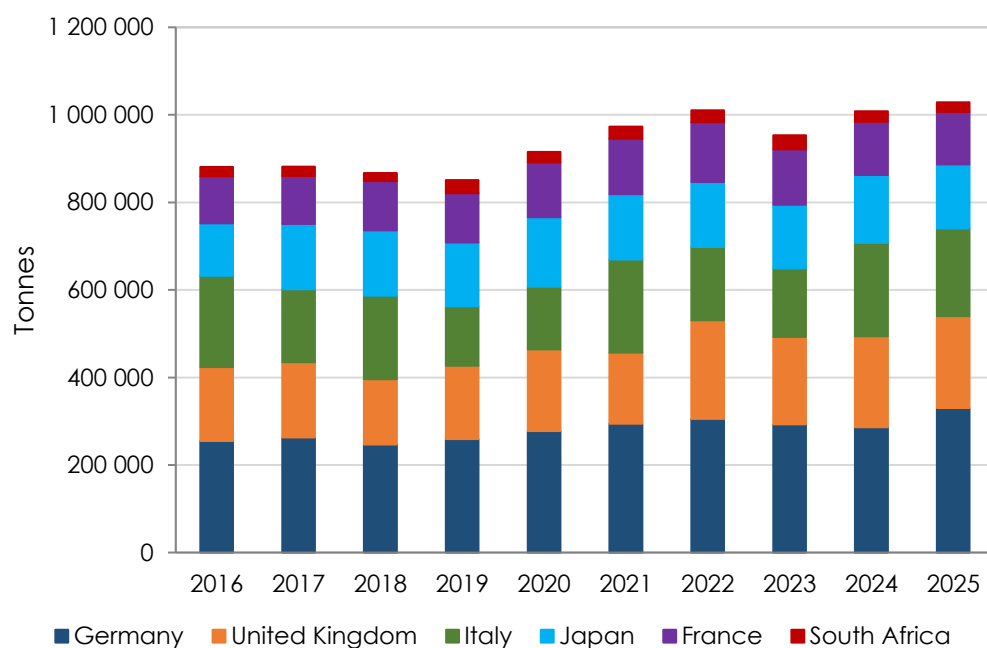


Figure 5. Selected major processed tomato product importers by volume, 2016 to 2025

Source: International Trade Centre Trade Map (2026), HS 2002.90. Selected importers with complete annual quantity observations.

Figure 4 illustrates export volume trends for selected major exporters of processed tomato products from 2016 to 2025, while Table 1 compares selected exporters by volume and value in 2025. China was the largest exporter by reported volume in 2025, at approximately 1.17 million tonnes, while Italy recorded the highest export value at approximately US\$1.37 billion. South Africa ranked 26th by export volume and 31st by export value. This can be viewed against a global processing base of approximately 40 producing countries represented in the WPTC production estimate.

Table 1. Selected global processed tomato product exporters, 2025

2025 exporters matrix				
Exporter	Volume (t)	Vol. rank	Value (USD 000)	Val. rank
China	1 165 581	1	845 946	2
Italy	793 799	2	1 366 800	1
United States	350 950	3	356 457	4
Spain	298 283	4	498 424	3
Portugal	245 177	5	342 867	5
South Africa	1 046	26	3 986	31

Source: International Trade Centre Trade Map (2026), HS 2002.90.

Turning to the import side, Table 2 compares selected major importers of processed tomato products in 2025. Germany and the United Kingdom ranked first and second respectively by both import volume and value, while South Africa ranked 32nd by volume and 30th by value.

Table 2. Selected global processed tomato product importers, 2025

2025 importers matrix				
Importer	Volume (t)	Vol. rank	Value (USD 000)	Val. rank
Germany	329 877	1	522 549	1
United Kingdom	210 018	2	352 761	2
Italy	200 293	3	233 303	4
Japan	146 453	4	252 897	3
France	119 942	5	204 421	5
South Africa	22 060	32	22 324	30

Source: International Trade Centre Trade Map (2026), HS 2002.90.

Within this global context, South Africa remains a relatively small processing tomato producer. The country recorded a processing crop of 160 000 tonnes in 2025, equivalent to approximately 0.4% of the global crop of 40.4 million tonnes. Despite its relatively small production volumes, South Africa participates in both export and import markets for processed tomato products, reflecting its participation in international trade and providing context for the domestic industry examined in the following section (WPTC, 2025; WPTC, 2026a).

3. South African industry overview

3.1 Tomato production

The South African tomato industry extends across primary production, fresh produce markets, processing, retail and food service activities. The Department of Agriculture, Land Reform and Rural Development (DALRRD), now the Department of Agriculture (DoA), estimated that the industry supports approximately 22 500 jobs, with a substantially larger number of dependants linked to these livelihoods. The industry also employs a significant number of lower-skilled workers (DALRRD, 2020).

As shown in Figure 6, total South African tomato production fluctuated over the period from 2015 to 2025. Production increased from 573 000 tonnes in 2015 to 679 000 tonnes in 2017, before declining in subsequent years. Output recovered to 533 000 tonnes in 2024 and then decreased to 486 000 tonnes in 2025. The series therefore shows considerable year to year variation in national tomato production, without attributing the changes to specific causes.

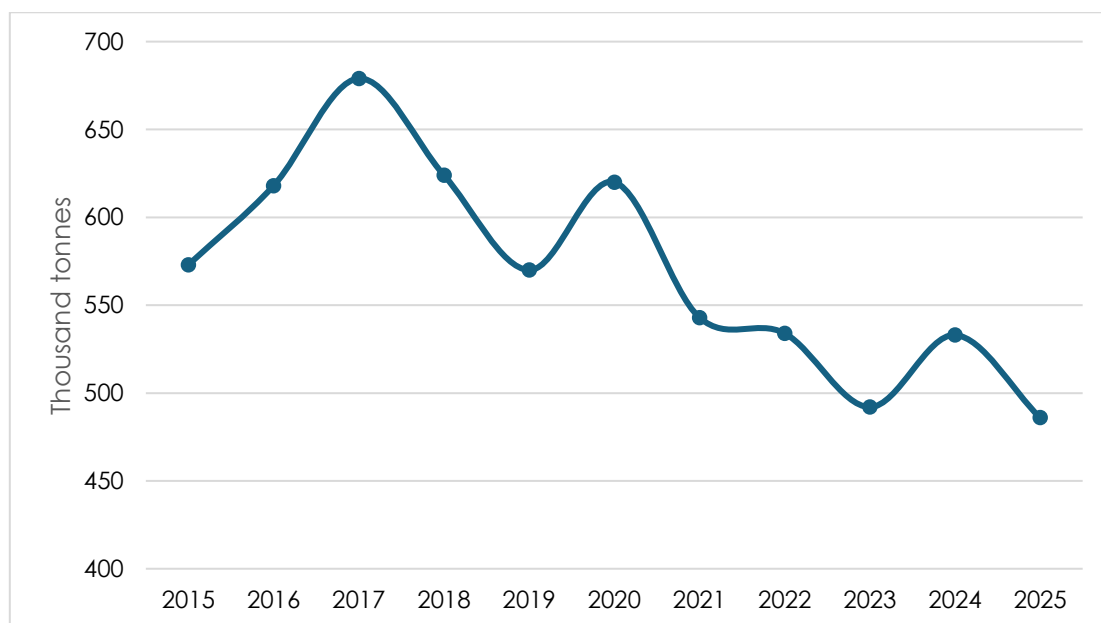


Figure 6. South African total tomato production, 2015 to 2025

Source: Quantec EasyData, Table 55: Tomatoes. Underlying source: Department of Agriculture, previously DALRRD.

National production is also unevenly distributed across provinces. Figure 7 compares provincial tomato production in 2017 and 2023, providing an indication of changes in the spatial distribution of production over the period. As shown in Table 3, Limpopo accounted for 64.1% of reported tomato production in 2023, followed by North West at 14.1%, while the Western Cape and KwaZulu Natal each accounted for approximately 8.0%.

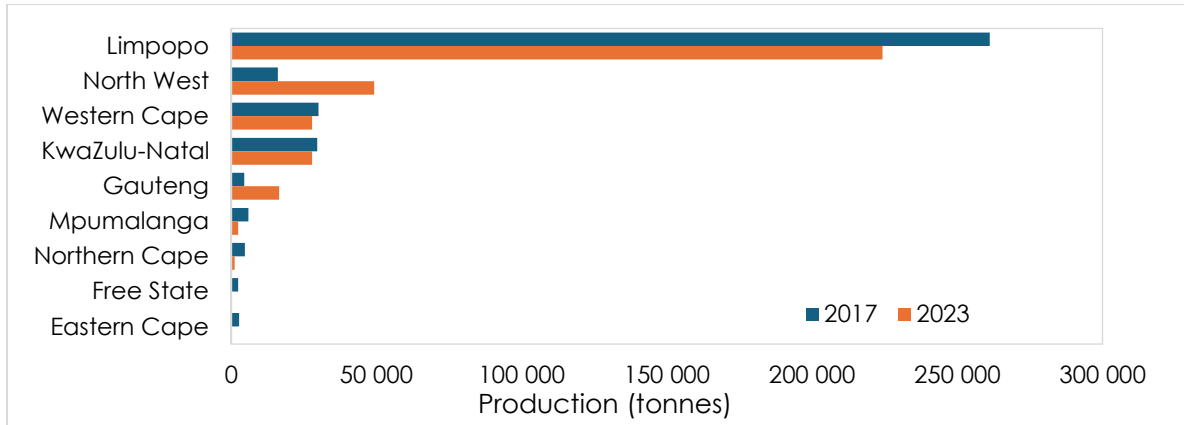


Figure 7. Provincial tomato production, 2017 and 2023

Source: Statistics South Africa (2025), Agricultural industry 2023, Table 3.2.

North West recorded a notable increase in production between 2017 and 2023 and surpassed the Western Cape as the second largest producing province in 2023. Table 3 also shows that the Western Cape recorded a comparatively high yield of 78.3 tonnes per hectare in 2023.

Table 3. Provincial tomato production indicators, 2017 and 2023

Province	2017 production (t)	2023 production (t)	2023 share	2023 yield (t/ha)
Limpopo	261 124	224 199	64.1%	79.3
North West	16 049	49 202	14.1%	70.6
Western Cape	30 087	27 891	8.0%	78.3
KwaZulu Natal	29 569	27 862	8.0%	33.0
Gauteng	4 490	16 536	4.7%	46.8
South Africa	357 150	349 528	100.0%	66.2

Source: Statistics South Africa (2025), Agricultural industry 2023, Table 3.2.

3.2 Processing tomato sector

South African tomato processing includes canning, freezing, juice production, purée, paste and other value added products. As shown in Figure 8, the processing tomato crop remained within a range of approximately 120 000 to 160 000 tonnes between 2021 and 2025, with the upper end of the range recorded in 2023 and 2025. These volumes refer to tomatoes grown or contracted for industrial processing rather than final tomato paste output.

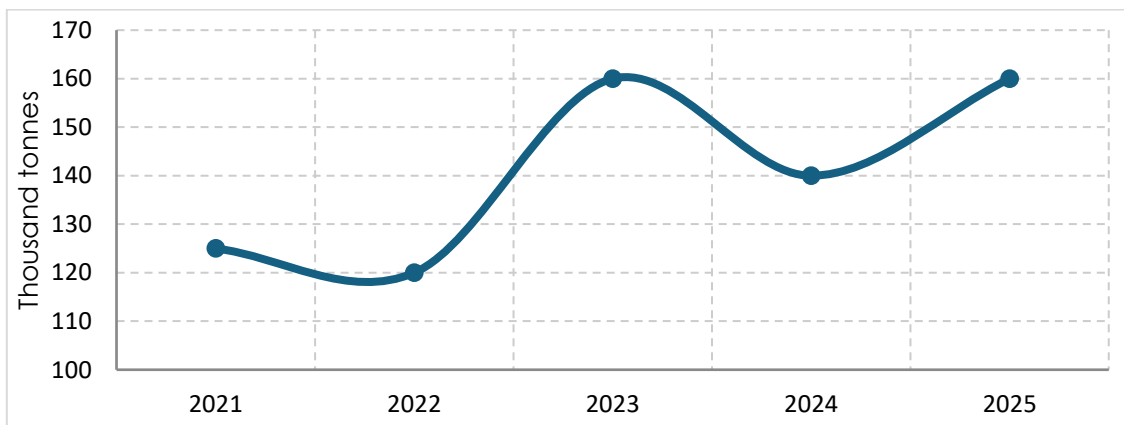


Figure 8. South African processing tomato crop, 2021 to 2025

Source: Compiled from successive WPTC World Production Estimates and crop updates for completed seasons.

Available industry evidence indicates that South African processors obtain tomatoes through a combination of contracted growers and, in some cases, processor owned production. Processing activities include paste and other processed tomato products, while imported paste is also used where required for particular products or specifications. Reported processing and contracted volumes vary across operations, reflecting differences in plant scale, product mix and sourcing arrangements. Local processing and imported paste can therefore coexist within the same market (NAMC, 2024a; Tiger Brands, 2026).

3.2.1 Product specification: hot break and cold break paste

Tomato paste can be produced using hot-break or cold-break processing, with the choice of process influencing the characteristics and potential end use of the paste. In hot-break processing, the tomato material is heated rapidly to deactivate pectin-degrading enzymes, helping to retain a higher viscosity (thickness and resistance to flow). Cold-break processing allows more enzyme activity before heating and generally produces a lower-viscosity product with different flavour and functional characteristics (Dauthy, 1995).

These differences are commercially relevant because downstream food manufacturers may require paste with particular viscosity, flavour, Brix and other product characteristics for specific applications. Tomato paste should therefore not be treated as a homogeneous product, and sourcing requirements may differ according to specification and intended use.

This distinction is important when interpreting imports and considering opportunities for greater domestic production. Further analysis would need to identify which paste specifications are imported, the downstream uses they serve, whether domestic processors have the required technology and capacity, and whether those specifications can be produced locally at a commercially viable cost.

3.3 Trade in processed tomato products

HS 2002.90 is used as the historical trade indicator for processed tomato products. South Africa remained a net importer from 2018 to 2025. Imports peaked at 31 877 tonnes in 2023 before declining to 21 979 tonnes in 2025, while exports remained relatively small at 1 046 tonnes. Table 4 summarises the main trade indicators.

Table 4. Key South African processed tomato product trade indicators, 2018 to 2025

Year	Imports (t)	Exports (t)	Import value (R m)	Trade balance (R m)	Import unit value (R/kg)
2018	17 990	1 138	192.8	-172.7	10.72
2019	29 509	919	347.6	-329.0	11.78
2020	24 367	837	377.8	-360.5	15.50
2021	27 159	1 386	407.2	-378.5	14.99
2022	26 913	1 429	455.7	-420.3	16.93
2023	31 877	1 194	736.4	-694.0	23.10
2024	23 852	999	580.6	-543.5	24.34
2025	21 979	1 046	397.7	-326.5	18.09

Source: Quantec EasyData, TRD11 Regional, HST six-digit, underlying source SARS. Values are current prices.

The value indicators add an economic dimension to the volume trends. South Africa's trade deficit in processed tomato products widened from R172.7 million in 2018 to R694.0 million in 2023, before narrowing to R326.5 million in 2025. Figure 9 further shows that changes in import expenditure reflected movements in both import volume and average import unit value.

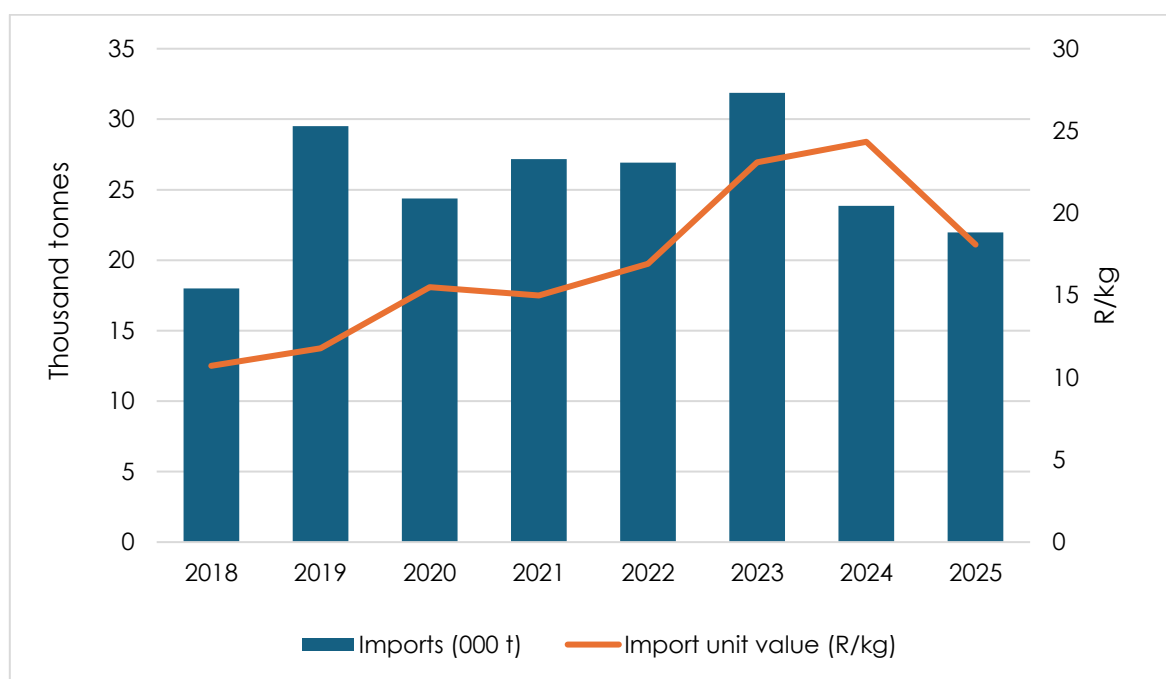


Figure 9. South African processed tomato product import trends, 2018 to 2025

Source: Quantec EasyData, TRD11 Regional, HST six-digit, underlying source SARS. Unit value is customs value divided by quantity and is not a pure market price comparison.

As shown in Figure 9, imports of processed tomato products remained a consistent feature of the South African market throughout the 2018-2025 period, despite annual fluctuations in volume and unit value. In 2023, South Africa recorded a relatively large processing crop of 160 000 tonnes, while imports of processed tomato products also peaked at approximately 32 000 tonnes. This suggests that imports play a complementary role alongside domestic production, reflecting differences in product specifications, market segments and downstream manufacturing requirements. Import unit values generally increased over the period, reaching R24.34/kg in 2024 before declining to R18.09/kg in 2025.

Supplier composition was concentrated in 2025. Figure 10 shows that China accounted for 69.0% of South Africa's processed tomato product import volume, followed by Italy at 15.3%. This highlights China's importance as a source of South African imports in that year.

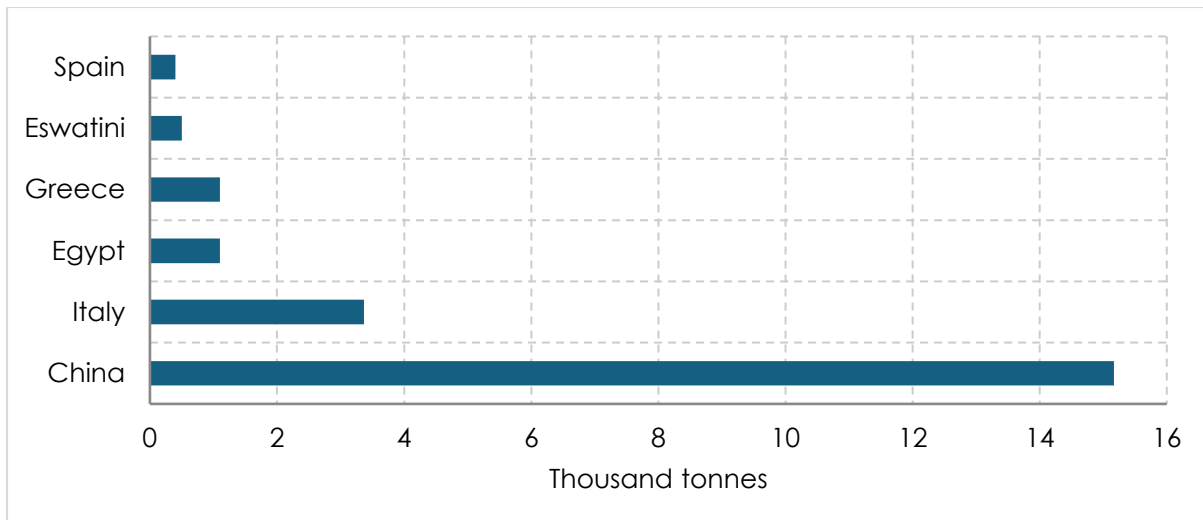


Figure 10. Main origins of South African processed tomato product imports, 2025

Source: Quantec EasyData, TRD11 Regional, HST six-digit, underlying source SARS.

More detailed SARS eight-digit data provide a closer view of bulk tomato paste within the broader processed tomato product category. Of the 21 979 tonnes imported in 2025, the two specifically defined bulk tomato paste lines accounted for 7 356 tonnes, or 33.5%, valued at approximately R117.9 million. China supplied about 78.5% of the volume recorded under these two bulk paste lines (SARS, 2026c).

The eight-digit classification therefore provides greater product detail within the broader HS 2002.90 trade series. Further information would be required to distinguish hot-break and cold-break paste, final manufacturing uses and the extent to which imports entered under the Schedule 3 rebate.

South African exports were concentrated in regional African markets in 2025, with Eswatini and Namibia together accounting for approximately 61.8% of export volume, followed by Zimbabwe, Botswana and Zambia. Downstream manufacturing also forms part of the value chain. South Africa recorded a trade surplus of approximately R302.3 million in tomato ketchup and other tomato sauces under HS 2103.20 in 2025, highlighting the role of processed tomato products within domestic value-added manufacturing.

3.4 Western Cape processing tomato industry

The Western Cape has an identifiable processing tomato production base centred on the Lutzville area. Around 30 Lutzville producers were contracted during the 2023 season, and the producer price was approximately R2 500 per tonne, subject to Brix-linked compensation (NAMC, 2024a).

The Western Cape summer processing crop reached approximately 70 000 tonnes in 2025. The latest WPTC update indicates that approximately 40 000 tonnes had been committed under grower–processor arrangements for the 2026 summer crop, but had not yet been realised as final production. The 2025 and 2026 figures are therefore not directly comparable. The smaller contracted programme for 2026 nevertheless identifies an important development for further investigation, particularly regarding the factors influencing production and contracting decisions (WPTC, 2025; WPTC, 2026b).

The Western Cape Department of Agriculture's 2025 enterprise budget for processing tomatoes in Lutzville provides an indicative farm-level benchmark. At an assumed yield of 100 tonnes per hectare and a producer price of R2 700 per tonne, gross income is R270 000 per hectare. The margin above specified costs is approximately R96 600 per hectare, or about R966 per tonne at the benchmark yield. However, the margin still has to contribute to fixed and overhead costs and should not be interpreted as the farmer's net profit. The benchmark values are summarised in Table 5.

Table 5. Indicative Lutzville processing tomato enterprise budget, 2025

Indicator	Value	Unit
Yield	100	t/ha
Producer price	2 700	R/t
Gross income	270 000	R/ha
Total allocatable variable costs	168 968	R/ha
Gross margin above allocatable variable costs	101 032	R/ha
Specified costs including interest	173 404	R/ha
Margin above specified costs	96 596	R/ha

Source: Western Cape Department of Agriculture (2025), Enterprise Budget: Tomatoes Processing, Lutzville. Benchmark figures are not a complete farm feasibility assessment.

Western Cape customs data show that 11 473 tonnes of processed tomato products were recorded as imports through the province in 2025, equivalent to 52.2% of national import volume. Exports recorded through the Western Cape amounted to 707 tonnes, equivalent to 67.6% of national export volume. These figures represent customs flows through the province rather than final provincial consumption, as products may subsequently be distributed elsewhere in South Africa.

3.5 Market conditions and trade policy

The cost of supplying tomato paste to the domestic market is influenced by whether the product is produced locally or imported. Locally produced paste is affected by production and processing factors such as fresh tomato contract prices, yield and Brix performance, plant utilisation, labour, electricity, water, packaging and logistics. Imported paste is affected by the international purchase price, exchange rate, freight and insurance, tariffs or rebates, port and inland logistics, and required product specifications. These factors are summarised in Table 6.

Table 6. Factors influencing the relative cost of local and imported tomato paste

Domestic production and processing factors	Import cost factors
Fresh tomato contract price	International paste price
Yield and Brix conversion efficiency	Exchange rate
Plant utilisation and scale	Freight and insurance
Labour, electricity and water	Tariff, preferential rate or rebate
Packaging, transport and logistics	Port and inland logistics
Finance and processing losses	Product specification and packaging

Source: Author compilation based on NAMC (2024a), Western Cape Department of Agriculture (2025), Quantec (2026b) and SARS (2026a, 2026b).

Trade policy also influences the cost of imported products. The SARS tariff schedule dated 28 August 2026 applies a 37% general customs duty to the three tariff lines under HS 2002.90. Imports from the EU and UK, EFTA and SADC qualify for duty-free preferential rates, subject to the applicable rules of origin. Imports originating from China are subject to the 37% general rate unless a qualifying rebate provision applies (SARS, 2026a). The tariff lines and preferential treatment are summarised in Table 7.

Table 7. Current tariff lines for processed tomato products under HS 2002.90

Tariff line	Product description	General rate	Preferential treatment
2002.90.10	Tomato paste, Brix not exceeding 32, specified Bostwick value, containers 200 litres or more	37%	EU/UK, EFTA, SADC: Free; other rates subject to agreements
2002.90.20	Tomato paste, Brix above 32 and not exceeding 38, containers 200 litres or more	37%	EU/UK, EFTA, SADC: Free; other rates subject to agreements
2002.90.90	Other products under HS 2002.90	37%	EU/UK, EFTA, SADC: Free; other rates subject to agreements

Source: SARS (2026a), Schedule 1 Part 1, Section IV, dated 28 August 2026. Preferential rates depend on applicable rules of origin. A separate full duty rebate may apply under Schedule 3, subject to an ITAC permit.

The first two tariff lines specifically identify bulk tomato paste according to product characteristics, including Brix, Bostwick value and packaging requirements. The requirement for containers of 200 litres or more identifies bulk industrial packaging and is separate from the conditions governing access to a duty rebate.

Schedule 3 provides a full duty rebate for qualifying tomato paste in containers of 200 litres or more used in the manufacture of specified food preparations, subject to an ITAC permit. The rebate is therefore linked to the qualifying product and its intended manufacturing use rather than simply to the quantity imported. The 37% general tariff does not necessarily represent the effective duty paid on qualifying imports entering under this rebate provision (SARS, 2026b; ITAC, 2026).

Customs data identify product classification and origin, but not whether individual imports entered under the rebate. Rebate utilisation, associated volumes and values, product specifications and manufacturing use therefore remain important evidence gaps (SARS, 2026c).

4. SWOT analysis

The SWOT synthesises the evidence for the South African and Western Cape processing tomato and tomato paste value chain. Strengths and weaknesses refer to characteristics within the domestic value chain, while opportunities and threats refer mainly to market and external conditions that can improve or weaken its position.

STRENGTHS	WEAKNESSES
- Established commercial processing base and grower-processor contracting arrangements - Processing presence in Limpopo and the Western Cape - Domestic tomato processing capability linked to downstream food manufacturing - Comparatively strong Western Cape yields, with the recent production decline associated mainly with reduced planted area rather than lower productivity - Positive indicative farm-level margin under the Lutzville enterprise budget assumptions	- Relatively small processing scale compared with major global producers - Farm and processing cost pressures, including labour, electricity, water and logistics - Limited contracted producer base and incomplete information on processing capacity and plant utilisation - Contraction in Western Cape planted area and a smaller contracted processing programme indicated for 2026 - Limited public information on final paste output, imported product specifications and end uses, processor costs and conversion ratios
OPPORTUNITIES	THREATS
- Assess the technical and commercial feasibility of producing selected imported paste specifications domestically - Higher Brix cultivars and improved production and processing efficiency - Expansion into regional African markets and greater downstream value addition - Stronger coordination between growers, processors and food manufacturers - More detailed trade and rebate utilisation information to identify specific market opportunities	- Climate variability, water constraints, pests and disease - Competition from alternative crops that may offer growers higher returns - Volatility in exchange rates, freight, fuel, electricity and other input costs - International price competition and concentrated global supply - Changes in tariff and rebate arrangements that alter the relative economics of domestic and imported supply

5. Conclusion and further considerations

Global processing tomato production is concentrated among a relatively small number of major producers, while the South African market combines domestic processing, imports of processed tomato products and downstream food manufacturing.

South Africa remains a relatively small processing tomato producer in global terms but participates in both import and regional export markets.

The Western Cape has an established processing tomato production base centred on Lutzville. Provincial data indicate comparatively strong tomato yields, while the 2025 enterprise budget provides a positive indicative margin above specified costs under the benchmark yield and price assumptions. The approximately 40 000 tonnes contracted for the 2026 summer crop represents a smaller production programme than the 70 000 tonnes realised in 2025, although the two figures are not directly comparable because one represents contracted volume and the other realised production.

Domestic production and imported tomato paste can occur alongside each other, with sourcing requirements influenced by product specification, processing requirements, international prices, exchange rates, processing capacity and downstream manufacturing needs. The distinction between hot-break and cold-break paste further indicates that tomato paste requirements differ according to specification and intended use.

Opportunities for further development of the domestic processing value chain may therefore exist where market demand, processing capacity, product specification and commercial viability align. Further analysis would help identify which imported specifications could feasibly be produced domestically and where additional production, processing or market development may be commercially viable.

5.1 Policy and industry considerations

- **Value-chain coordination.** Support coordination between production, agro-processing, market access and economic analysis functions so that identified market opportunities can be considered across the value chain.
- **Market and industry information.** Improve the availability of information on processing tomato production, final tomato paste output, product specifications, processing capacity and utilisation, detailed trade flows and, where available, aggregate rebate-related import data.

- **Western Cape industry engagement.** Engage growers and processors to better understand the factors influencing the smaller contracted programme reported for 2026, including grower participation, contracting arrangements, alternative crop returns, processing demand and production costs.
- **Whole-value-chain assessment.** Future trade, production or support measures should consider the position of growers and processors together with the requirements of downstream food manufacturers.

5.2 Further analytical work

This market intelligence report identifies several areas for deeper economic and technical analysis, particularly around product specifications, processing economics, Western Cape production, rebate utilisation and regional market opportunities.

A priority is to assess which imported tomato paste specifications could feasibly be produced domestically. The distinction between hot-break and cold-break paste shows that sourcing requirements differ by product and end use. Further work could examine cultivar and quality requirements, processing technology, required volumes, conversion costs, contracting arrangements and the relative cost of imported paste.

The Western Cape production base also warrants further analysis. Provincial data indicate comparatively strong yields, while the decline in production between 2017 and 2023 was associated mainly with reduced planted area. Comparison with North West, where production expanded over the same period, could help identify the role of market demand, producer returns, contracting arrangements, crop choice and production conditions in determining whether renewed production growth is commercially viable.

Further work should also examine rebate utilisation and farm-to-factory economics. Information on rebate-related import volumes, values, product specifications and manufacturing uses would help clarify whether imports primarily address supply, cost or specification requirements. A fuller value-chain assessment could combine grower returns with processor economics, including contract prices, Brix performance, conversion ratios, plant utilisation, processing losses, energy, water and logistics costs. Regional export and downstream value-added opportunities should also be assessed. The detailed evidence priorities are summarised in Appendix A.4.

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Appendix A. Data sources, definitions and limitations

The report uses several data series that describe different parts of the tomato value chain and are therefore not directly interchangeable. Total tomato production is not the same as processing tomato production, and processing tomato tonnage is not equivalent to final tomato paste output. Similarly, HS 2002.90 provides a consistent historical trade indicator for processed tomato products but includes products in addition to tomato paste. This appendix provides additional definitions, source information and interpretation notes to support the analysis in the main report.

A.1 Data definitions and interpretation

Table A1 sets out the key data definitions and interpretation notes used throughout the report.

Table A1. Key data definitions

Data item	Definition	Interpretation note
Total tomato production	All tomatoes produced, regardless of market channel.	National source totals can differ because of methodology and coverage.
Processing tomato crop	Tomatoes grown or contracted for industrial processing.	Not equivalent to final tomato paste output.
Contracted processing volume	Volume committed under grower and processor arrangements for a forthcoming crop.	Not equivalent to realised production.
Processed tomato products (HS 2002.90)	Tomatoes prepared or preserved otherwise than by vinegar or acetic acid, excluding whole tomatoes or tomatoes in pieces.	Consistent historical trade category but broader than tomato paste alone.
Bulk tomato paste (HS 2002.90.10 and 2002.90.20)	Tariff lines identifying tomato paste in containers of 200 litres or more, differentiated by Brix and, for HS 2002.90.10, Bostwick characteristics.	Provides recent product-specific detail but is not available as a consistent long historical series in Quantec.
Import unit value	Customs value divided by import quantity.	Useful trade indicator, not a pure price comparison.
Western Cape customs trade	Trade recorded through the province.	Does not equal final provincial consumption.
2026 WPTC figures	Latest crop estimate or contracted summer crop, depending on the update.	Not final production outcomes.
Final tomato paste output	Finished tomato paste produced after processing and concentration.	Cannot be inferred directly from processing tomato tonnage without conversion information.

A.2 Main data sources and coverage

Table A2 summarises the main data sources, periods covered and interpretation of each indicator.

Table A2. Main data sources

Indicator	Main source	Period	Interpretation
Global processing tomatoes	WPTC	2021 to 2025	Historical crop volumes. 2026 estimate discussed separately.
Global tomato paste related trade	ITC Trade Map	2016 to 2025	HS 2002.90 historical trade indicator.
National tomato production	Quantec / Department of Agriculture	2005 to 2025	All tomatoes. Domestic national trend.
Provincial tomato production	Statistics South Africa	2017 and 2023	Latest comparable provincial physical production structure.
South African processing crop	WPTC / NAMC	2021 to 2026	Tomatoes grown or contracted for industrial processing, not tomato paste output.
South African and Western Cape trade	Quantec / SARS	2018 to 2025; 2024 to Jul 2026 detailed	HS 2002.90 historical series; national eight-digit SARS detail from 2024.
Tariff structure	SARS / ITAC	2026	Eight-digit tomato paste tariff lines, preferential rates and rebate rules.
Western Cape enterprise budget	Western Cape Department of Agriculture	2025	Farm level benchmark for Lutzville processing tomatoes.

A.3 Trade classification and data limitations

Tomato paste cannot be separately identified over the full historical period using the six-digit trade classification available in Quantec. The report therefore uses HS 2002.90 as the closest consistent historical indicator for processed tomato product trade. This category includes tomato paste as well as certain other prepared tomato products.

The detailed SARS customs extract used in this report provides eight-digit data from 2024 onward. HS 2002.90.10 and HS 2002.90.20 specifically identify bulk tomato paste according to product and packaging characteristics, while HS 2002.90.90 covers other products within the broader category. The detailed data therefore provide greater product specificity for recent years, while the six-digit HS 2002.90 series remains the consistent basis for the longer historical analysis.

The detailed SARS customs extract provides import and export information for HS 2002.90.10, HS 2002.90.20 and HS 2002.90.90 from 2024 to July 2026. The detailed 2025 data are used for the product composition analysis, while the Quantec EasyData historical trade series, based on underlying SARS customs data, is retained for trend analysis. The 2026 data are year to date through July and are therefore not compared directly with full-year observations.

A.4 Data and evidence priorities for future work

- **Rebate utilisation:** Further information on the use of the bulk tomato paste rebate, including associated import volumes and values and downstream manufacturing uses where publishable.
- **Western Cape contracting:** Current grower and processor information on the factors influencing the smaller contracted processing programme reported for 2026.
- **Processing economics:** Processor-level information on conversion ratios, plant utilisation, processing capacity and costs for comparison with imported-product costs.
- **Imported product specifications:** Information on the specifications and end uses of imported tomato paste, including the extent to which these products could feasibly be produced domestically.
- **Western Cape production:** Further evidence on the factors influencing changes in tomato planted area and production in the Western Cape.
- **Production measurement:** More consistent data distinguishing contracted processing volumes, realised processing tomato production and final tomato paste output.

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