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U.S. Processed Tomato Stocks-on-Hand Report for December 1, 2025

Total inventories of U.S. processed tomato products were approximately 11.4 million tons, stated on a raw product equivalent basis, as of December 1, 2025, according to a report released today by the California League of Food Producers. Inventory is up 10.8% from the prior year level. Apparent disappearance of tomato stocks has increased 3.5%, totaling approximately 7.1 million tons during the six-month period of June 1, 2025 to December 1, 2025, as compared to the prior reporting period.

Total bulk tomato paste stocks, including inventory held for remanufacture, were estimated to total approximately 8.3 million tons, on a raw product "paid-for tons" equivalent basis, as of December 1, 2025.

The U.S. bulk tomato paste-for-sale inventory on December 1, 2025 was approximately 5.6 million tons, on a raw product "paid-for tons" equivalent basis.

CLFP statistics reports are **estimates**, assuming 100% reporting, of the total U.S. processed tomato supply based on voluntary reports from processors throughout the United States. Participating processors handle approximately 92.1% of total U.S. tonnage of processing tomatoes, and 99% of total U.S. paste production.

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CLFP Statistics Report
January 20, 2026

California League of Food Producers
U.S. PROCESSED TOMATO SUPPLY & MOVEMENT

The 2025-2026 U.S. Processed Tomato Supply and Movement reported is based on 92.1% of the industry reporting data. All numbers are rounded to the nearest 1,000 lbs. for the purposes of this report.

December	2024-2025	2025-2026	% + / -	2025-2026
Beginning Inventory (June 1 Inventory of prior reporting year)	5,648,000	6,407,000	13.4%	NA
Pack	11,554,000	12,146,000	5.1%	NA
Total Supply	17,202,000	18,553,000	7.9%	NA

	(assuming 100% reporting)			(actual – estimated 92.1% of industry reporting)
December 1 Inventory	10,300,000	11,411,000	10.8%	10,508,000
6 Month Disappearance	6,902,000	7,142,000	3.5%	NA
Monthly Disappearance	1,150,000	1,190,000	3.5%	NA

This report is an **estimate** of total U.S. supply and demand for processed tomato products. Reports are based on voluntary pack and inventory reports furnished by participating U.S. processors.

All positions are stated on a "raw product tons" equivalent basis.

CLFP "Pack Year" begins June 1 and ends May 31.

2025-2026 pack year statistics based on reports from processors handling 92.1% of U.S. tonnage. USDA no longer reports production for other states, so a three-year average of production for those states for the period 2017-2019 was assumed in calculation of 100% reporting estimates.



California League of Food Producers
**2025-2026 U.S. BULK TOMATO PASTE
SUPPLIES & DECEMBER 1 INVENTORY**

January 20, 2026

TO U.S. TOMATO PROCESSORS AND INTERESTED PARTIES:

Listed below are the 2025-2026 Bulk Tomato Paste and Bulk Tomato “Paste for Sale” pack and inventory **estimates** as of December 1, 2025 for U.S. Tomato Processors. The 2025-2026 U.S. Processed Tomato Supply and Movement reported is based on an estimated 99% of the industry reported data for bulk tomato paste. Representation below is assuming 100% reporting as well as actual paste as reported. All numbers are rounded to the nearest 1,000 lbs. for the purposes of this report.

Total Bulk Tomato Paste Pack and Inventory			
	<u>2024-2025</u> (assuming 100% reporting)	<u>2025-2026</u> (assuming 100% reporting)	<u>2025-2026</u> (As reported)
Total Bulk Tomato Paste Pack (including bulk "paste for sale" and paste held for companies' own remanufacture operations)	8,401,000	8,749,000	8,662,000
Total Bulk Tomato Paste Inventory as of December 1	7,668,000	8,362,000	8,278,000

Total Bulk Tomato "Paste for Sale" Stock in Drums, Bins & Bulk			
	<u>2024-2025</u> (assuming 100% reporting)	<u>2025-2026</u> (assuming 100% reporting)	<u>2025-2026</u> (As reported)
Total Bulk Tomato “Paste for Sale” Pack	7,270,000	7,623,000	7,547,000
Total Bulk Tomato “Paste for Sale” Inventory as of December 1	5,186,000	5,637,000	5,581,000

Bulk Tomato “Paste for Sale” – Bulk tomato paste, converted to a raw product “paid for tons” equivalent, being held in drums, bins, and bulk, that has been packed to be sold. The estimates do not include bulk paste being held for companies’ own remanufacture or paste in food service or retail/consumer package sizes.

CLFP "Pack Year" begins June 1 and ends May 31.