



# Global Sun-Dried Tomato Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

## Moving forward, together

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Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

**ANDREY SHEVCHENKO**, Managing Partner

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## Market at a glance

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| Indicator              | Value                |
|------------------------|----------------------|
| Market size (2025)     | USD 1.7 bn           |
| Forecast (2031)        | USD 2.6 bn           |
| CAGR (2021-2031)       | 7%                   |
| Study period           | 2021-2031            |
| Largest region         | Europe · 37.2%       |
| Fastest-growing region | Asia-Pacific · 8.8%  |
| Market concentration   | Low                  |
| Licence                | Individual / Company |

The global sun-dried tomato market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe accounted for XX% of 2025 revenue, supported by established Mediterranean production, high household penetration and deep foodservice integration. Asia-Pacific is the fastest-growing region at an XX% CAGR as Western-style foodservice, premium retail and industrial seasoning applications broaden demand. Growth is concentrating in oil-packed formats, clean-label recipes, flexible packaging and products positioned around Mediterranean flavor, convenience and traceable origin.

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## Executive summary

The global sun-dried tomato market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe accounted for XX% of 2025 revenue, supported by established Mediterranean production, high household penetration and deep foodservice integration. Asia-Pacific is the fastest-growing region at an XX% CAGR as Western-style foodservice, premium retail and industrial seasoning applications broaden demand. Growth is concentrating in oil-packed formats, clean-label recipes, flexible packaging and products positioned around Mediterranean flavor, convenience and traceable origin.

| Indicator        | Value |
|------------------|-------|
| Market size 2025 | XXX   |
| Forecast 2031    | XXX   |
| CAGR             | XXX   |
| Largest region   | XXX   |
| Fastest region   | XXX   |

## Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global revenue expands at a XX% CAGR between 2025 and 2031.
- Europe led the market with a XX% revenue share in 2025.
- Asia-Pacific is forecast to grow at an XX% CAGR, the highest rate among the five assessed regions.
- Oil-packed and marinated products represented XX% of 2025 market value.
- Glass jars captured XX% of packaging revenue, reflecting the premium positioning of retail antipasti and recipe ingredients.
- Retail channels represented XX% of 2025 sales, while food manufacturing is the fastest-growing channel at an XX% CAGR.
- Organic products accounted for XX% of value and are forecast to grow at a XX% CAGR.

## Market size and forecast

Market value by year, USD bn

| Indicator            | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|----------------------|------|------|------|------|------|------|------|
| Market value, USD bn | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Market volume        | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Production           | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Imports              | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Exports              | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Apparent consumption | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |

Source: XXX

Year-over-year value change

| Indicator    | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|--------------|------|------|------|------|------|------|
| Market value | X%   | X%   | X%   | X%   | X%   | X%   |
| Production   | X%   | X%   | X%   | X%   | X%   | X%   |
| Imports      | X%   | X%   | X%   | X%   | X%   | X%   |
| Exports      | X%   | X%   | X%   | X%   | X%   | X%   |

Source: XXX

# Global Sun-Dried Tomato Market Trends and Growth Drivers

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Sun-dried tomatoes sit at the intersection of agricultural processing, premium preserved vegetables and flavor ingredients. Demand is shaped less by staple tomato consumption than by the product's ability to deliver concentrated savory flavor, visual identity and shelf stability across home cooking, restaurants and industrial formulations.

The supply side is unusually sensitive to conversion yield and specification. Producers must secure suitable tomato varieties, remove substantial moisture, manage salt and preservative systems, and deliver consistent color, water activity and texture despite seasonal variation. Oil-packed suppliers carry additional exposure to edible-oil, glass and freight costs.

Market growth is therefore rewarding two distinct capabilities: consumer-facing brands that stimulate recipe usage and industrial suppliers that provide documented, repeatable functionality. Vertically integrated processors can participate in both pools while using pieces, off-cuts and secondary grades in flakes, powders, spreads and custom formulations.

## Growth drivers

### Global adoption of Mediterranean flavors

Mediterranean recipes have moved from specialist restaurants into mainstream home cooking, meal kits, cafés and prepared-food portfolios. Sun-dried tomatoes provide concentrated umami, color and acidity in a shelf-stable format, allowing operators to create a premium flavor signal without handling fresh tomatoes or lengthy roasting processes.

### Convenient premium meal preparation

Oil-packed julienne cuts and ready-to-use halves shorten preparation time while preserving a handcrafted visual identity. The format is gaining shelf space alongside olives, pesto and antipasti as households trade up from commodity canned tomatoes to ingredients that deliver restaurant-style meals at home.

### Industrial formulation expansion

Food manufacturers increasingly use pieces, flakes and powders in breads, crackers, cheese products, sauces, dressings, soups and frozen meals. Standardized particle size, moisture and microbial specifications are making sun-dried tomato ingredients easier to incorporate at scale, widening demand beyond consumer jars.

### Clean-label savory intensity

Sun-dried tomatoes supply concentrated tomato flavor, natural color and perceived culinary authenticity using an ingredient consumers readily recognize. Formulators use the product to reduce reliance on artificial flavors and to strengthen vegetable-forward claims in premium recipes.

### Recipe-led digital demand

Highly shared creamy chicken, salmon and pasta recipes have introduced sun-dried tomatoes to younger and less frequent category buyers. The effect extends from search and social engagement into supermarket replenishment because a single jar can support multiple dishes and recipe variants.

### **Organic and provenance premiumization**

Certified organic tomatoes, extra-virgin olive oil marinades and named-origin claims support higher unit values and improve differentiation in a fragmented category. Integrated growers and processors benefit most because they can document seed selection, field practices, drying conditions and packing provenance.

### **Foodservice cuisine diversification**

Demand is extending beyond Italian menus into sandwiches, breakfast dishes, salads, plant-forward bowls and contemporary casual dining. Foodservice packs with consistent cuts and controlled oil pickup reduce kitchen labor and produce predictable plate costs.

## **Restraints**

### **Tomato and drying-cost volatility**

Sun-dried products require substantial fresh-tomato input and lose most of their harvested weight during drying. Weather disruption, contracted-acreage changes, labor costs and energy use in finishing operations can therefore produce sharp movements in finished-product costs and working-capital requirements.

### **Food-safety and residue compliance**

Dried tomatoes require disciplined control of water activity, pathogens, pesticide residues, foreign material and permitted preservatives. Exporters serving the European Union and United States face buyer testing, traceability and facility-control requirements that raise the cost of qualification for smaller processors.

### **Substitution by lower-cost tomato ingredients**

Roasted tomatoes, tomato paste, semi-dried tomatoes and savory flavor systems can replace sun-dried tomatoes in applications where visual identity is secondary. Substitution pressure is strongest in price-sensitive sauces and prepared meals during periods of high dried-tomato prices.

### **Oil and packaging exposure**

Oil-packed products carry additional exposure to olive-oil and seed-oil pricing, glass costs and freight weight. Oxidation, seal integrity and light exposure also require packaging discipline, limiting the scope for aggressive material reduction in premium shelf-stable products.

### **Fragmented specifications and supply**

Products vary materially in cultivar, salt, sulphite treatment, moisture, color, cut size and oil formulation. Buyers must qualify multiple specifications and origins, slowing supplier changes and increasing the inventory needed to protect continuity.

# Sun-Dried Tomato Market Driver and Restraint Impact on the Forecast

## Drivers — impact on forecast

| Driver                                   | Impact on CAGR | Geography | Horizon |
|------------------------------------------|----------------|-----------|---------|
| Global adoption of Mediterranean flavors | XXX            | XXX       | XXX     |
| Convenient premium meal preparation      | XXX            | XXX       | XXX     |
| Industrial formulation expansion         | XXX            | XXX       | XXX     |
| Clean-label savory intensity             | XXX            | XXX       | XXX     |
| Recipe-led digital demand                | XXX            | XXX       | XXX     |
| Organic and provenance premiumization    | XXX            | XXX       | XXX     |
| Foodservice cuisine diversification      | XXX            | XXX       | XXX     |

Source: XXX

## Restraints — impact on forecast

| Restraint                                     | Impact on CAGR | Geography | Horizon |
|-----------------------------------------------|----------------|-----------|---------|
| Tomato and drying-cost volatility             | XXX            | XXX       | XXX     |
| Food-safety and residue compliance            | XXX            | XXX       | XXX     |
| Substitution by lower-cost tomato ingredients | XXX            | XXX       | XXX     |
| Oil and packaging exposure                    | XXX            | XXX       | XXX     |
| Fragmented specifications and supply          | XXX            | XXX       | XXX     |

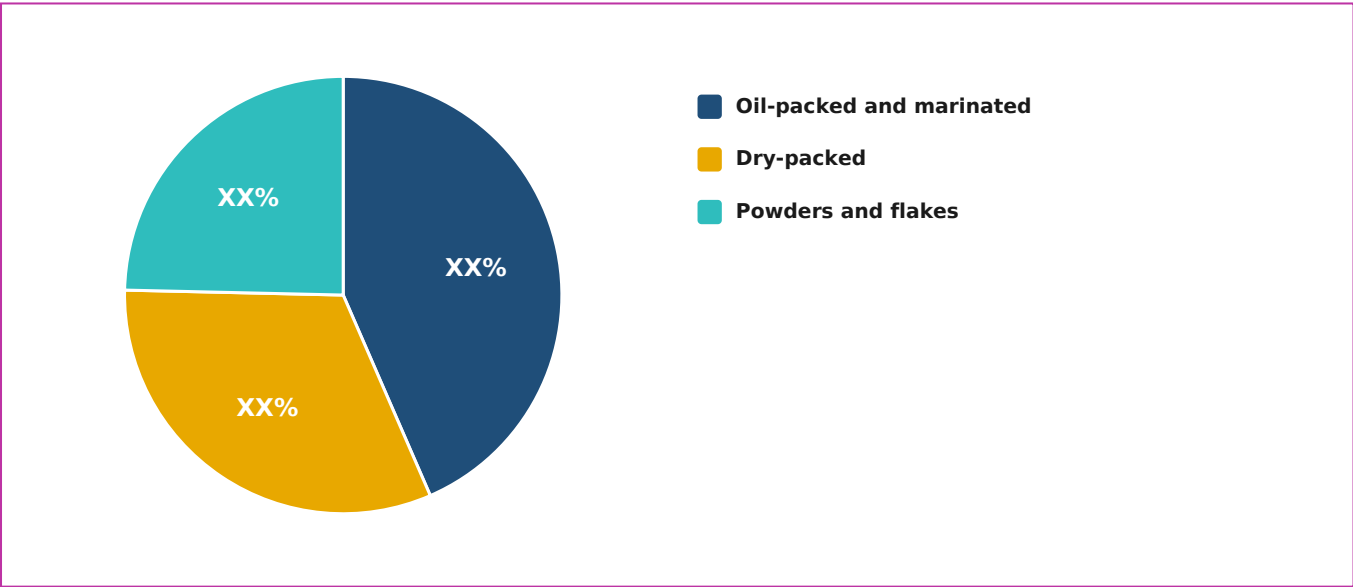
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## Sun-Dried Tomato Market Segmentation Analysis

### By Product Form

Oil-packed products command the largest value share because they are ready to use, visually premium and strongly established in retail and foodservice. Dry-packed tomatoes retain an important position in bulk distribution and recipes requiring control over oil, salt and rehydration. Powders and flakes are growing fastest as manufacturers seek concentrated tomato flavor for snacks, bakery products, soups, seasoning blends and sauces.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

| Segment                  | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|--------------------------|------|------|------|------|------|------|------------|------|
| Oil-packed and marinated | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Dry-packed               | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Powders and flakes       | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

### By Packaging

Glass jars lead because they display product quality, support oil-based recipes and reinforce premium antipasti positioning. Flexible packs are gaining share through lower freight weight, resealability and suitability for dry-packed retail and foodservice products. Cans, tubs and bulk cartons remain important where unit cost, operational handling and large-volume throughput outweigh shelf presentation.

**Value by packaging, USD bn**

| Segment                   | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---------------------------|------|------|------|------|------|------|------------|------|
| Glass jars                | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Flexible pouches and bags | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Cans and rigid tubs       | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Bulk cartons and drums    | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

**By Nature**

Conventional products dominate because they offer broader origin availability, lower costs and the range of specifications required by food manufacturers. Organic products achieve stronger pricing in premium retail and natural-food channels, particularly when combined with olive oil and named provenance. Growth depends on certified tomato acreage, segregation through drying and packing, and reliable organic oil supply.

**Value by nature, USD bn**

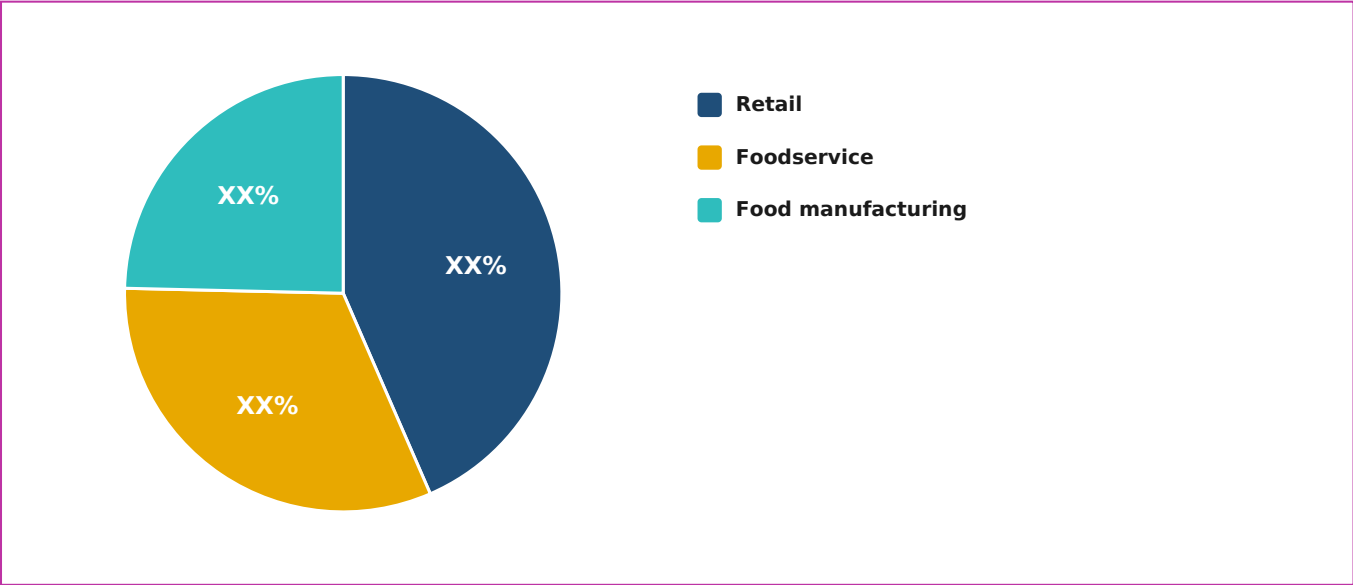
| Segment      | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|--------------|------|------|------|------|------|------|------------|------|
| Conventional | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Organic      | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

**By Distribution Channel**

Retail leads through supermarkets, specialty grocers, warehouse clubs and e-commerce, where jars and resealable bags carry high unit values. Foodservice demand is driven by Italian, Mediterranean, bakery, sandwich and casual-dining operators seeking labor-saving, portionable ingredients. Food manufacturing grows fastest as sun-dried tomato moves into sauces, breads, ready meals, snacks, cheeses and seasoning systems.

Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

| Segment            | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|--------------------|------|------|------|------|------|------|------------|------|
| Retail             | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Foodservice        | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Food manufacturing | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

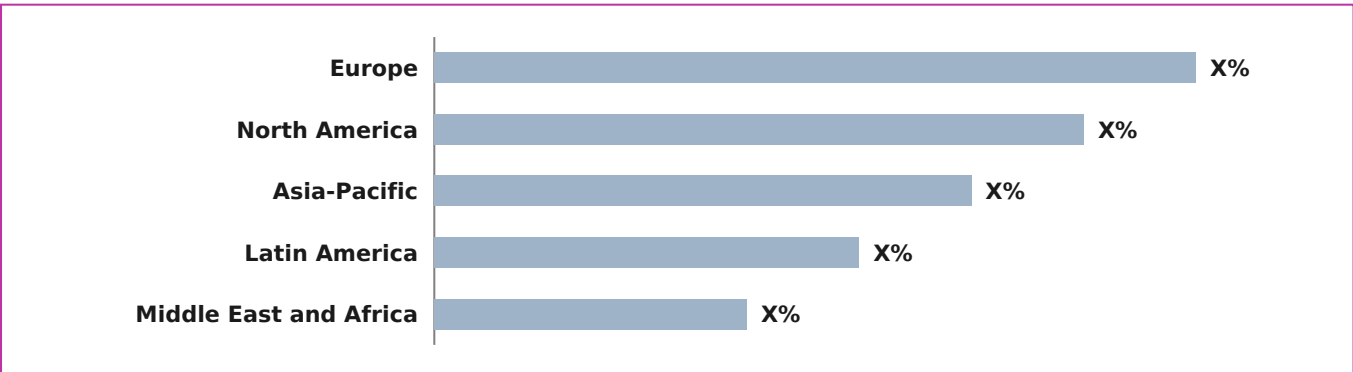
# Sun-Dried Tomato Market Regional Analysis and Country Outlook

Europe generated XX% of global revenue in 2025, led by Italy, Germany, the United Kingdom, France and Spain. Italy combines established drying and preserving expertise with strong domestic antipasti consumption and export-oriented brands, while northern European markets deliver higher retail values through premium jars, organic lines and Mediterranean meal solutions. European buyers also source from Turkey and other Mediterranean origins, making regional trade, residue compliance and crop conditions decisive for price formation.

North America held XX% of market value, supported by vertically integrated California suppliers, established grocery brands and extensive use in foodservice and industrial formulations. The United States remains the region's core market, with recipe-led demand supporting jarred products and food manufacturers using dry cuts and powders in sauces, bakery products and prepared meals. California's large processing-tomato base gives domestic suppliers procurement and traceability advantages, although sun-dried varieties and drying capacity form a specialized subset of the broader crop.

Asia-Pacific will record the fastest regional CAGR at XX% through 2031. Premium supermarkets, Western-style restaurant chains, bakery manufacturers and seasoning companies are expanding the addressable market in China, Japan, South Korea, Australia and India. Latin America and the Middle East and Africa remain smaller revenue pools, but local tomato availability, tourism, modern retail and food-processing investment create attractive opportunities in Brazil, Mexico, Türkiye, the Gulf states and South Africa.

## Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

| Region                 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|------------------------|------|------|------|------|------|------|------------|------|
| Europe                 | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| North America          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Asia-Pacific           | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Latin America          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Middle East and Africa | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

Market value by leading country, USD bn

| Country        | 2025 | 2031 | Share 2025 | CAGR |
|----------------|------|------|------------|------|
| United States  | XXX  | XXX  | XXX        | XXX  |
| Germany        | XXX  | XXX  | XXX        | XXX  |
| United Kingdom | XXX  | XXX  | XXX        | XXX  |
| Belgium        | XXX  | XXX  | XXX        | XXX  |
| Netherlands    | XXX  | XXX  | XXX        | XXX  |
| Japan          | XXX  | XXX  | XXX        | XXX  |
| China          | XXX  | XXX  | XXX        | XXX  |
| Mexico         | XXX  | XXX  | XXX        | XXX  |

Source: XXX

## Sun-Dried Tomato Market Competitive Landscape and Company Share

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The global market is fragmented, with branded retail specialists, vertically integrated growers, Mediterranean preserved-vegetable companies, broadline importers and industrial dehydrated-ingredient suppliers competing under different economics. The leading five suppliers accounted for XX% of 2025 value, leaving significant room for regional brands, private-label packers and origin specialists. Competitive advantage rests on contracted tomato access, drying know-how, microbiological control, product consistency and the ability to serve both retail and bulk customers.

BCFoods strengthened its industrial proposition by fully integrating Culinary Farms into the BCFoods brand in April 2025, combining specialist dried-tomato capabilities with a wider international supply network. Traina Foods acquired Martin Farms in October 2024, reinforcing California sun-drying capacity and traditional production expertise. In retail, Mooney Farms, California Sun Dry, Saclà, DeLallo, Mezzetta and Roland Foods compete through brand recognition, recipe activation, olive-oil formulations and distribution reach.

Strategic investment is moving toward vertical integration, automated sorting, solar-assisted drying, validated pathogen controls and flexible product formats. Suppliers are also broadening beyond halves and strips into powders, tapenades, pesto, snack products and customized inclusions. Consolidation will remain selective because regional origin, family ownership and customer-specific recipes preserve the role of specialized producers.

Leading companies

| Company             | HQ  | Est. revenue 2025 | Market share 2025 | YoY |
|---------------------|-----|-------------------|-------------------|-----|
| BCFoods             | XXX | XXX               | XXX               | XXX |
| Traina Foods        | XXX | XXX               | XXX               | XXX |
| Valley Sun Products | XXX | XXX               | XXX               | XXX |
| Mooney Farms        | XXX | XXX               | XXX               | XXX |
| California Sun Dry  | XXX | XXX               | XXX               | XXX |
| F.Ili Saclà         | XXX | XXX               | XXX               | XXX |
| Roland Foods        | XXX | XXX               | XXX               | XXX |
| DeLallo             | XXX | XXX               | XXX               | XXX |
| G.L. Mezzetta       | XXX | XXX               | XXX               | XXX |
| Fratelli Polli      | XXX | XXX               | XXX               | XXX |
| Galen               | XXX | XXX               | XXX               | XXX |
| I Contadini         | XXX | XXX               | XXX               | XXX |

Source: XXX

# Sun-Dried Tomato Market Forecast, Scenarios and Opportunities

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The market will add approximately USD XXX million between 2025 and 2031. Base-case growth is anchored by continued adoption in premium home cooking, foodservice and industrial formulations, with value growth exceeding volume growth as organic, olive-oil-packed and origin-certified products gain mix. Oil-packed products will remain the largest format, while powders and flakes will deliver the fastest expansion.

The upside scenario is driven by faster foodservice adoption in Asia-Pacific, successful clean-label innovation and broader use in snacks and savory seasoning systems. The downside scenario centers on consecutive weak tomato crops, elevated olive-oil and glass costs, or tighter residue and preservative compliance that restricts eligible export supply. Multi-origin sourcing and longer-term grower contracts provide the strongest protection against these pressures.

Winning suppliers will combine agricultural control with application development. Retail brands need recipe-led merchandising and packaging that communicates oil quality, provenance and ease of use, while business-to-business suppliers need standardized moisture, color, cut and microbial specifications. Companies that convert drying by-products into powders and secondary ingredients will also improve yield economics and sustainability performance.

## Opportunities

- Clean-label products without added sulphites
- Sun-dried tomato powders for snacks, seasonings and bakery formulations
- Single-origin Mediterranean and California product lines
- Foodservice-ready julienne cuts and portion-controlled packs
- Organic and regenerative-agriculture sourcing programmes
- Expansion through premium grocery and e-commerce in Asia-Pacific
- Hybrid solar drying and water-efficient processing investments

This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24-72 hours.