

Global Tomato Paste Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 11.7 bn
Forecast (2031)	USD 16.5 bn
CAGR (2021-2031)	5.9%
Study period	2021-2031
Largest region	Asia-Pacific · 34.2%
Fastest-growing region	Middle East and Africa · 7.4%
Market concentration	Moderate
Licence	Individual / Company

The global tomato paste market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, advancing at a CAGR of XX%. Demand is expanding across sauces, condiments, foodservice, ready meals and tomato-based snack seasonings, while aseptic bulk formats remain the commercial backbone of international trade. Asia-Pacific leads with XX% of global value, supported by China's processing base and rising consumption across India and Southeast Asia. Supply discipline, agricultural yields, Brix levels, energy costs and crop concentration in California, the Mediterranean and China will remain decisive for processor margins and contract pricing.

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Executive summary

The global tomato paste market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, advancing at a CAGR of XX%. Demand is expanding across sauces, condiments, foodservice, ready meals and tomato-based snack seasonings, while aseptic bulk formats remain the commercial backbone of international trade. Asia-Pacific leads with XX% of global value, supported by China's processing base and rising consumption across India and Southeast Asia. Supply discipline, agricultural yields, Brix levels, energy costs and crop concentration in California, the Mediterranean and China will remain decisive for processor margins and contract pricing.

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

Key findings

- The global tomato paste market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- World Processing Tomato Council data place the 2025 global processing crop at XXX metric tonnes, following XXX tonnes in 2024.
- The June 2026 WPTC forecast placed the 2026 processing crop at XXX metric tonnes, XX% below 2025.
- Asia-Pacific represented XX% of market value in 2025, with China remaining one of the three largest processing origins.
- Double-concentrated paste accounted for XX% of 2025 value because it balances transport economics, handling performance and reconstitution flexibility.
- Aseptic bags, drums and bins represented XX% of market value and dominate long-distance industrial supply.
- Business-to-business sales accounted for XX% of value, reflecting the scale of sauce, condiment, prepared-food and foodservice procurement.
- WPTC forecast China to process XXX tonnes in 2026, XX% above 2025, while California's expected crop declined to approximately XXX tonnes.

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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

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Global Tomato Paste Market Trends and Growth Drivers

Tomato paste economics begin in the field and are settled in the evaporator. Grower contract prices, yield per hectare, soluble solids and factory utilization determine the processor's cost base before packaging and freight are added. This makes the market unusually responsive to weather, irrigation allocations and planting decisions in California, the Mediterranean and China.

Demand is structurally broader than retail shelf sales suggest. Most paste enters sauces, ketchup, foodservice preparations, ready meals, soups and seasonings as an intermediate ingredient, making B2B procurement the market's center of gravity. Buyers increasingly assess suppliers on continuity, functional consistency, residue compliance and carbon performance alongside price.

The next growth phase will combine emerging-market volume with product and supply-chain specialization. High-Brix aseptic formats will lead industrial trade, while tubes, pouches, organic paste and certified-origin products will add value in consumer channels.

Growth drivers

Sauce and condiment manufacturing scales globally

Tomato paste is the standardized color, solids and flavor base for ketchup, pasta sauce, pizza sauce, barbecue sauce and regional condiments. Capacity additions by packaged-food manufacturers convert directly into recurring bulk-paste demand, particularly for double concentrate supplied under annual specifications.

Foodservice networks deepen ingredient demand

Quick-service restaurants, cloud kitchens, institutional caterers and casual-dining chains require consistent viscosity and flavor across outlets. Expansion in India, the Gulf, Southeast Asia and Latin America favors standardized aseptic paste that can be reconstituted locally into sauces and pizza toppings.

Emerging-market diets shift toward packaged foods

Urban consumers are allocating more spending to noodles, ready meals, savory snacks and convenient cooking bases. Tomato paste benefits as a shelf-stable and cost-efficient ingredient that gives manufacturers a familiar flavor profile without dependence on year-round fresh tomato supply.

High-Brix concentrate lowers delivered solids cost

Triple concentrate moves more tomato solids per container than lower-concentration products, reducing freight, storage and handling intensity. The advantage is strongest on long-haul routes from China, California, Italy, Spain, Portugal and Turkey to deficit markets.

Private-label retail widens household penetration

Retailers are expanding value-tier cooking ingredients as households seek economical substitutes for finished sauces. Private-label cans, tubes and pouches improve shelf visibility and introduce paste to

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consumers who previously purchased only ketchup or prepared sauce.

Agronomic productivity supports reliable supply

Mechanized harvesting, precision irrigation, disease-resistant varieties and real-time crop monitoring raise factory utilization and stabilize solids yield per hectare. Integrated processors can translate these gains into longer supply commitments and more competitive conversion costs.

Restraints

Water scarcity constrains major growing regions

Processing tomatoes require dependable irrigation and tightly scheduled harvesting near factories. Reduced water allocations in California, drought exposure in Mediterranean basins and reservoir pressure in Chile and Australia can lower planted area, yields and Brix simultaneously.

Crop cycles destabilize prices and inventories

Large crops create inventory carryover and downward price pressure, while simultaneous shortfalls rapidly tighten paste availability. This cycle complicates procurement budgets for food manufacturers and compresses processor margins when raw-material contracts and finished-product prices reset at different speeds.

Packaging and energy costs pressure conversion margins

Evaporation is energy-intensive, while industrial exports depend on aseptic liners, steel drums, wooden pallets and ocean freight. Abrupt increases in these inputs disproportionately affect processors serving distant markets under fixed-price contracts.

Compliance raises market-access costs

Importers increasingly require pesticide-residue screening, contaminant testing, authenticity verification, lot-level traceability and social-compliance documentation. Smaller exporters face higher unit costs and longer customer-approval cycles, especially in the European Union and North America.

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Tomato Paste Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Sauce and condiment manufacturing scales globally	XXX	XXX	XXX
Foodservice networks deepen ingredient demand	XXX	XXX	XXX
Emerging-market diets shift toward packaged foods	XXX	XXX	XXX
High-Brix concentrate lowers delivered solids cost	XXX	XXX	XXX
Private-label retail widens household penetration	XXX	XXX	XXX
Agronomic productivity supports reliable supply	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Water scarcity constrains major growing regions	XXX	XXX	XXX
Crop cycles destabilize prices and inventories	XXX	XXX	XXX
Packaging and energy costs pressure conversion margins	XXX	XXX	XXX
Compliance raises market-access costs	XXX	XXX	XXX

Source: XXX

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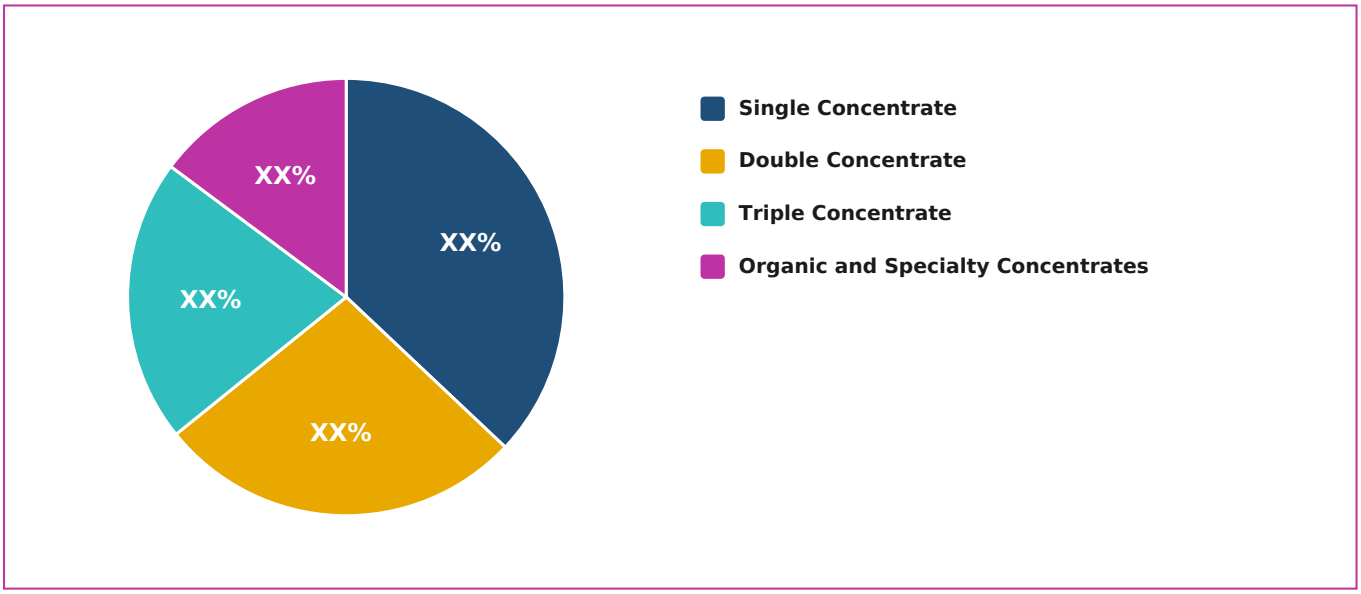
Tomato Paste Market Segmentation Analysis

By Concentration Type

Double concentrate is the default industrial specification because it balances solids content, pumping characteristics and reconstitution economics. Triple concentrate is gaining on long-distance routes and in large-scale sauce plants seeking lower storage and freight costs. Single concentrate remains relevant in regional foodservice and consumer formats, while organic and specialty specifications command premium pricing.

Value share by concentration Type, 2025



Source: XXX

Value by concentration Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Single Concentrate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Double Concentrate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Triple Concentrate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic and Specialty Concentrates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Aseptic industrial packs dominate cross-border business because they protect product without refrigerated distribution and integrate with automated sauce plants. Cans retain a strong position in household and foodservice kitchens, but tubes and pouches are expanding through resealability, portion control and lower package weight. Glass jars occupy premium and regional retail niches.

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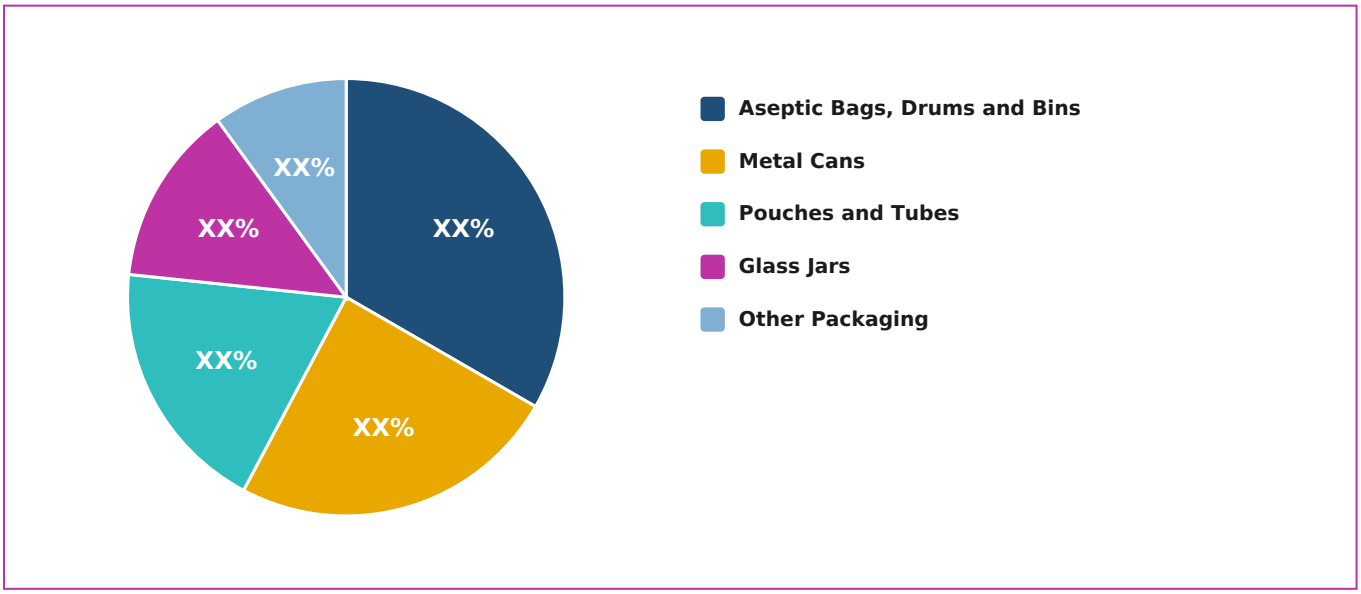
Value share by packaging, 2025



Source: XXX

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Aseptic Bags, Drums and Bins	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Metal Cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pouches and Tubes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Glass Jars	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Sauce and condiment manufacturers are the largest users because tomato paste provides standardized soluble solids, viscosity, acidity and color. Foodservice demand is growing through pizza, quick-service meals and institutional catering. Ready meals and savory snacks are gaining share as manufacturers incorporate tomato solids into frozen dishes, noodle seasonings and extruded-snack coatings.

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Sauces and Condiments	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Preparations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready Meals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soups and Broths	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Savory Snacks and Seasonings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct and distributor-mediated B2B contracts dominate because sauce companies and foodservice manufacturers purchase paste by container, solids specification and crop year. Retail remains smaller but benefits from private-label expansion, e-commerce availability and convenient resealable packaging. B2B growth is increasingly tied to technical support, supply assurance and multi-origin contracting.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-Business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and Consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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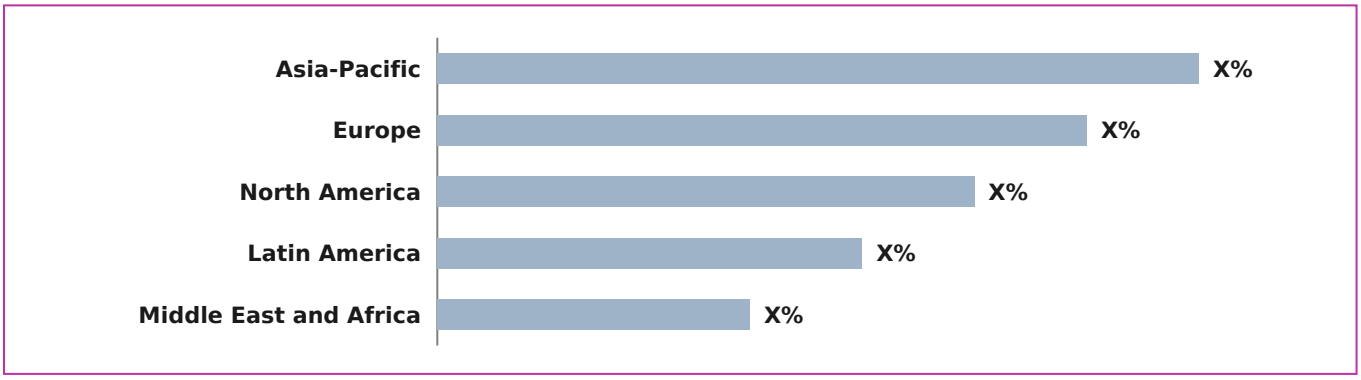
Tomato Paste Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global tomato paste value in 2025. China combines a large processing base with extensive export infrastructure, although domestic absorption is rising as hot-pot, condiment and foodservice demand expands. WPTC placed China's 2026 crop expectation at XXX tonnes of processing tomatoes and estimated domestic processed-tomato consumption at XXX tonnes of raw-tomato equivalent. India and Southeast Asia remain structurally import-oriented for high-quality paste, creating opportunities for regional repacking and application development.

Europe accounted for XX% of value, supported by Italy, Spain, Portugal, Turkey and Iran as major production origins and by dense consumption across the United Kingdom, Germany, France and the Nordic countries. The AMITOM area was forecast by WPTC to process XXX tonnes in 2026, more than XX% of global output. European competition increasingly centers on origin, color, residue performance, carbon intensity and traceable grower relationships rather than concentration alone.

North America retained a XX% share, anchored by California's integrated production and large sauce, foodservice and prepared-meal industries. Latin America benefits from Brazilian and Chilean processing capacity, while the Middle East and Africa will grow fastest at XX% as restaurant networks, local sauce manufacturers and urban packaged-food consumption expand. Turkey, Egypt, Iran and emerging African packers provide a bridge between regional crops and high-growth deficit markets.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	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

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Tomato Paste Market Competitive Landscape and Company Share

The market is moderately concentrated at the processing level and fragmented at the branded retail level. Large primary processors secure advantage through contracted acreage, high-throughput evaporators, harvest logistics and multi-year relationships with multinational food manufacturers. Morning Star, Kagome-controlled Ingomar, COFCO Tunhe and other scaled processors have material influence over globally traded aseptic supply, while Mutti, Conserve Italia, La Doria and Princes are stronger in branded and private-label European channels.

Kagome's consolidation of Ingomar in January 2024 combined seed development, grower access, primary processing and secondary sauce production within its United States value chain. The January 2026 acquisition of UK distributor Silbury extended Kagome's route to foodservice customers in Northern Europe. Morning Star's purchase of the former Del Monte Hanford property in 2025 highlighted continuing rationalization of California processing assets, even though the buyer indicated that it would seek another operator for the site.

Strategic investment is moving toward water productivity, higher-solids varieties, optical sorting, lower-energy evaporation, aseptic-bin formats and customer-specific functional specifications. Companies that can balance California, Mediterranean, Chinese and Southern Hemisphere sourcing will be best positioned to protect service levels through crop volatility.

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Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
The Morning Star Company	XXX	XXX	XXX	XXX
Kagome Co., Ltd.	XXX	XXX	XXX	XXX
Ingomar Packing Company, LLC	XXX	XXX	XXX	XXX
COFCO Tunhe Tomato Co., Ltd.	XXX	XXX	XXX	XXX
Conagra Brands, Inc.	XXX	XXX	XXX	XXX
Mutti S.p.A.	XXX	XXX	XXX	XXX
Conserve Italia Soc. Coop. Agricola	XXX	XXX	XXX	XXX
La Doria S.p.A.	XXX	XXX	XXX	XXX
Sugal Group	XXX	XXX	XXX	XXX
Tat Gıda Sanayi A.Ş.	XXX	XXX	XXX	XXX
Tukaş Gıda Sanayi ve Ticaret A.Ş.	XXX	XXX	XXX	XXX
Princes Group	XXX	XXX	XXX	XXX

Source: XXX

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Tomato Paste Market Forecast and Commercial Opportunities

The market will add USD XXX billion in annual value between 2025 and 2031. Volume growth will be led by emerging-market sauces and foodservice, while value growth will also reflect higher requirements for traceability, color consistency, low-residue production and specialized packaging. Double concentrate will remain the largest product category, but triple concentrate and organic or identity-preserved paste will grow faster.

The central forecast assumes global processing crops remain within a broad 39-XXX tonne band, with periodic regional shortages offset by inventories and alternative origins. A sustained water shock across California and the Mediterranean would lift contract prices and accelerate reformulation toward higher-Brix products; consecutive bumper crops would instead increase private-label promotion and pressure commodity-processor margins.

Winning suppliers will combine agronomic control with customer-side formulation support. Long-term grower contracts, heat-tolerant genetics, renewable process energy, aseptic packaging expertise and local technical sales teams will deliver stronger returns than undifferentiated spot-market exports.

Opportunities

- Localized packing of imported bulk concentrate in Africa and South Asia
- Organic, clean-label and certified-origin tomato paste
- Resealable tubes and stand-up pouches for portion control
- Long-term supply agreements with restaurant and prepared-food groups
- Heat-tolerant seed varieties and water-efficient contract farming
- Low-carbon evaporation and renewable-energy processing plants

> 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.

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