**Required Report:** Required - Public Distribution **Date:** June 02, 2026

**Report Number:** MX2026-0028

# **Report Name:** Tomatoes and Products Annual

**Country:** Mexico

**Post:** Guadalajara

**Report Category:** Tomatoes and Products

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**Report Highlights:**

Mexico's 2026 tomato production is forecast at 2.6 million metric tons (MMT), a 9 percent decrease from 2025. This is mainly a result of the continued imposition of a 17 percent antidumping duty on U.S. imports of Mexican tomatoes, reduced profit margins for producers, and weather conditions. This reduction in production is expected to contribute to a forecasted 9 percent decrease in tomato exports to 1.8 MMT in 2026. The United States remains Mexico's top export market for tomatoes, typically importing over 90 percent of Mexico's exportable supply.

**Production**

Mexican tomato production is expected to continue the downward trend that began in 2023. For calendar year (CY) 2026, tomato production is forecast to decrease 9 percent to 2.6 MMT. This is mainly a result of ongoing market disruptions (including the 17 percent antidumping duty on U.S. imports of Mexican tomatoes), reduced profit margins for producers, and unfavorable weather conditions. Planted area is forecast at 38,000 hectares for CY 2026, an 11 percent decrease from CY 2025. Post also expects a reduction in area dedicated to open skies planting in favor of shifting production to protected systems, including greenhouses and shaded structures.

**Table 1: Mexico Tomato Area and Production, 2022-2026**

| Year | Planted Area (Ha) | Harvested Area (Ha) | Production (MT) |
|---|---|---|---|
| **2022** | 48,180 | 47,328 | 3,185,508 |
| **2023** | 47,245 | 46,319 | 3,220,048 |
| **2024** | 45,793 | 44,778 | 3,197,019 |
| **2025** | 42,112 | 40,875 | 2,807,090 |
| **2026*** | 38,000 | 36,500 | 2,550,000 |

*Data Source: Agri-Food and Fisheries Information Service (SIAP)*
**Post Forecast*

In July 2025, the U.S. government terminated the 2019 suspension agreement with Mexico and imposed an antidumping duty of 17.09 percent on most Mexican fresh tomato imports. This duty, combined with the appreciation of the Mexican peso in 2025 and early 2026, has squeezed profit margins for many Mexican tomato producers and exporters. The value of the Mexican peso increased by 14 percent in 2025 and 2 percent through April 2026. Mexican tomato exports typically enter the U.S. market through negotiated contracts in fixed U.S. dollar (USD) prices or the spot market. The peso appreciation has reduced the number of pesos Mexican exporters receive for each dollar of tomato sales to international markets. According to industry reports, these factors have also led to some consolidation in the market and growers transitioning to other crops in the face of uncertainty.

Mexico produces tomatoes in 31 out of 32 states and utilizes three production methods for tomatoes: open skies (low tech), shaded infrastructure with some automatic irrigation (medium tech), and greenhouse and substrate production with advanced irrigation (high tech). Protected agriculture (medium and high tech) is the main mechanism for tomato production in Mexico, representing about 65 percent of total production. Low tech producers obtain between 45 to 75 MT per hectare. Medium tech offers yields that reach an estimated 140 to 215 MT per hectare. High tech producers (especially the specialty

tomatoes growers) can obtain between 250 and 300 MT per hectare. The most advanced production methods include greenhouse infrastructure, controlled climate, substrate as a soil, and drip irrigation with minerals that support ideal plant growth.

**Figure 1: Medium Tech Tomato Production Facility in San Luis Potosi, Mexico**

*Shaded infrastructure with tomato vines planted directly into soil and automatic irrigation*
*Photo source: FAS Mexico*

**Figure 2: High Tech Tomato Production Facility in San Luis Potosi, Mexico**

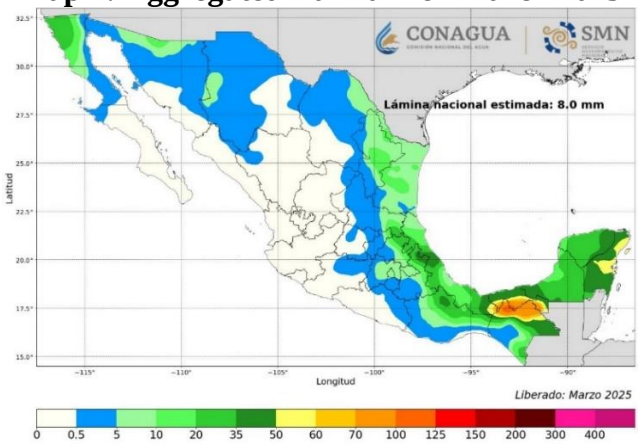
*Greenhouse with tomato vines planted directly on substrate with drip irrigation and controlled shade*
*Photo source: FAS Mexico*

Mexico produces a broad range of tomato varieties that are ripened on the vine, including traditional varieties (Round and Roma) and specialty varieties (Cherry, Grape, and Heirloom). With growing U.S. demands for greenhouse-grown tomatoes and specialty varieties, Mexican industry reports a shift to expand technology advancements and protected production systems. Many growers are starting to shift investments into medium and high-tech operations, allowing them to test out new varieties and respond to evolving demands. Smaller operations are ditching open-sky production due to the weather uncertainty, instability in the export market, and economic fluctuations.

Mexican tomato growers are still carrying the low-yield burden suffered during the 2025 droughts. However, late rains in the first quarter of 2026 provided a critical baseline of water availability for the summer and autumn production windows, especially across the Central and Bajío regions. While protected production does not rely on seasonal rainfall, rains refill the phreatic mantles and wells where producers obtain water for precision irrigation. However, relief from these late rains is not driving expansion.

Industry remains concerned about the looming threat of a Super El Niño phenomenon and the potential for natural hazards in northern Mexico, predominantly Sinaloa, that could heavily compromise protected greenhouse production. Although anticipated winter rains could help replenish depleted regional reservoirs, the accompanying dense cloud cover and sustained humidity during peak flowering could create ideal conditions for devastating fungal and bacterial outbreaks. This microclimate could penalize overall yields and generate high volumes of unmarketable tomatoes, which has the potential to limit the exportable surplus.

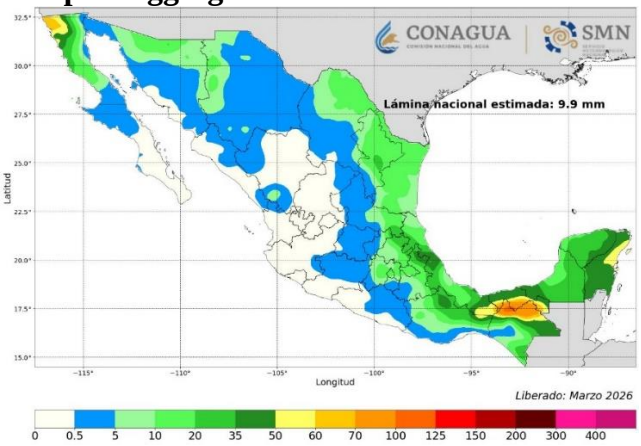
**Map 1: Aggregated Rainfall for March 2025**




*Source: Mexican National Water Commission*

*Legend: From left to right on scale above, white represents low rainfall and purple represents high rainfall*

**Map 2: Aggregated Rainfall for March 2026**




*Source: Mexican National Water Commission*

*Legend: From left to right on scale above, white represents low rainfall and purple represents high rainfall*

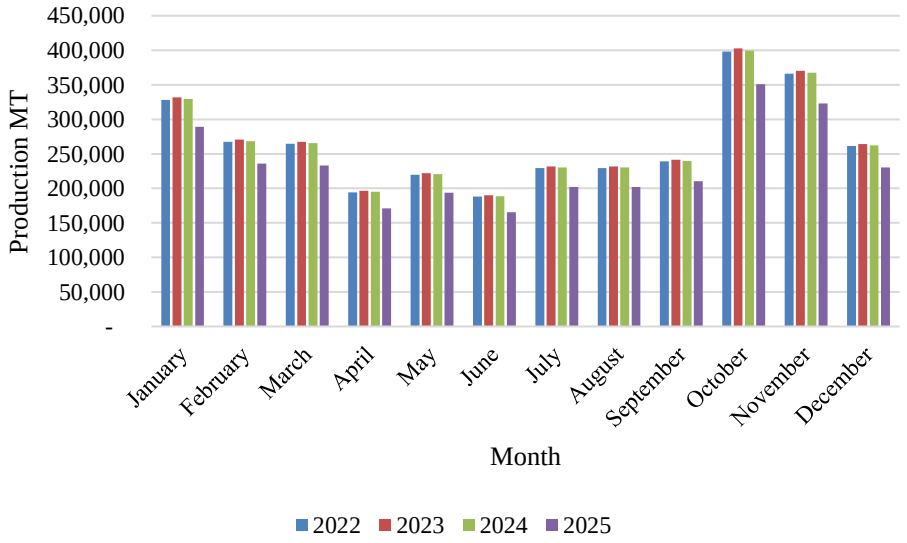
Mexico's domestic tomato market has experienced unprecedented price spikes and instability in late 2025 and early 2026. Growers have scaled back total acreage dedicated to tomato production intended for export in the face of uncertainty. This has reduced the traditional volume buffer for the domestic market, causing retail consumer prices for standard *Saladette* tomatoes, the most consumed variety, to increase. According to the Mexican National Institute of Statistics and Geography, 20 states in Mexico are reporting year-over-year price increases of over 100 percent (as of April 2026), with remaining states reporting price increases between 68 and 97 percent. Continuous demand is likely to keep prices high at least until summer production begins in July.

**Table 2: Tomato Production for 2025 in Top Producing States in Mexico (MT)**

| State | Production (MT) | Share of Total Mexican Production |
|---|---|---|
| Sinaloa | 496,713 | 18% |
| San Luis Potosi | 312,597 | 11% |
| Sonora | 190,825 | 7% |
| Others | 1,806,956 | 64% |

*Data Source: SIAP*

**Graph 1: Monthly Production of Tomatoes in Mexico (MT), 2022-2025**




*Data Source: SIAP*

**Policy**

In July 2025, the U.S. Department of Commerce announced the termination of the 2019 Tomato Suspension Agreement with Mexico and the subsequent imposition of a 17.09 percent duty on almost all fresh tomatoes imports from Mexico to the United States.

On September 2, 2025, Mexico announced updated minimum floor prices (see Table 3) for the export of fresh tomato varieties to the United States. In a joint statement released by the Secretariat of Agriculture and the Secretariat of Economy, the Government of Mexico stated that the purpose of the measure is "to protect national production, avoid distortions in the international market, and guarantee the supply to domestic consumption, after the termination, in July 2025, of the Agreement to Suspend the Anti-Dumping Investigation in the United States."

**Table 3: Minimum Tomato Floor Prices FOB Set by Mexico in September 2025, U.S. Side of the Border**

| Tomato Variety | Minimum Price USD per kg |
|---|---|
| Round | $0.95 |
| Roma (Saladette) | $0.88 |
| Stem On (Round) | $1.35 |
| On the Vine (Round) | $1.25 |
| Cherry | $1.50 |
| Grape | $1.50 |
| Other varieties (Cocktail, Campari, Kumato, Mini Roma, Heirloom, Pera, Medley, San Marzano) | $1.70 |

*Data Source: Mexico's Official Gazette*

**Consumption**

Post forecasts domestic tomato consumption at 707,000 MT in CY 2026, a 14 percent decrease from 2025. Given the price increases in the first half of 2026, Mexican consumers are reducing tomato consumption, especially in low-income areas of the country.

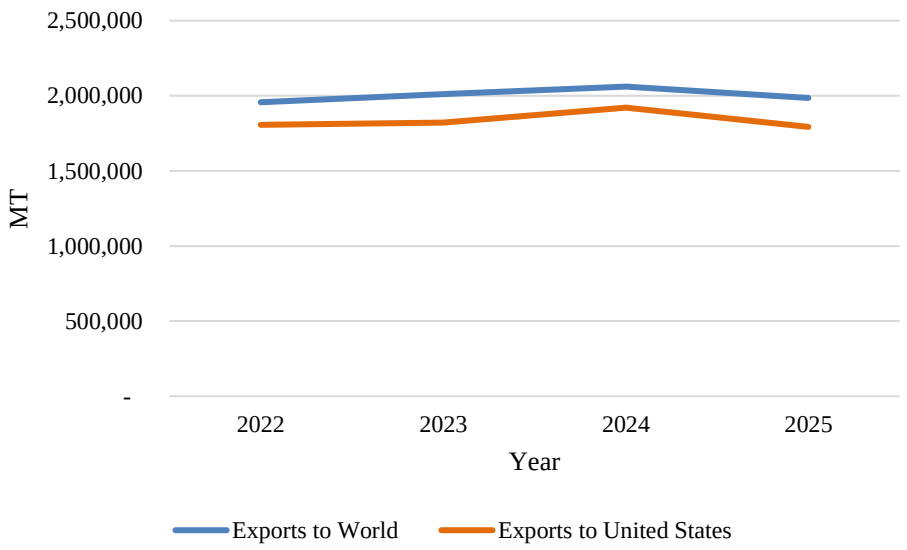
Tomatoes remain the number one vegetable consumed by Mexicans and are a cornerstone of the Mexican food basket and diet. Tomatoes are largely consumed fresh and are often purchased on a weekly basis by Mexican households. They are commonly used in sauces, salsas, soups, stews, and main dishes. Tomatoes help balance sweetness and acidity of common Mexican dishes.

**Trade**

Post forecasts Mexican tomato exports to decrease by 7 percent in CY 2026 to 1.8 MMT, in line with forecasted declines in production and continued uncertainty regarding the U.S. market. Historically, Mexico exports between 65 percent and 70 percent of its total fresh tomato volume, leaving the remainder for domestic consumption or processing. Over 90 percent of Mexican tomato exports are sent to the U.S. market, with the remainder typically exported to Canada, Japan, and Central America.

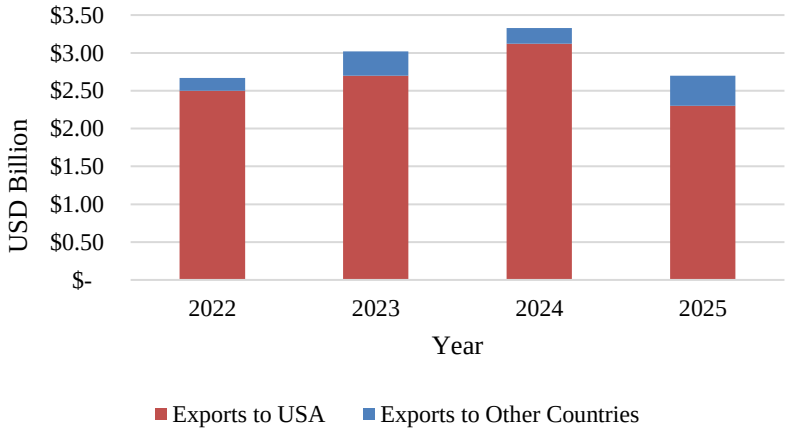
In 2025, Mexican tomato exports declined by 4 percent to 2.0 MMT. Exports to the U.S. market decreased by 7 percent to 1.8 MMT. This was due to a combination of severe, persistent drought conditions that compromised yields across key northern hubs like Sinaloa, the antidumping duty, and more competitive pricing in the domestic market during the year. While some export volume shifted to Canada (close to 7,500 MT increase in Mexican tomato exports to Canada in 2025), this growth represents less than 1 percent of the total quantity of exports to the U.S. market.

**Graph 2: Mexican Tomato Exports (MT), World vs. U.S. Market**




*Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor*

**Graph 3: Mexican Tomato Exports (USD billions)**




*Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor*

Mexico is not a major tomato importer. Imports only come from the United States to help meet domestic demand during seasonal low production periods. Imports are focused on organic, specialty, and Roma varieties. Imports in CY 2025 totaled less than 2,000 MT.

**Tariffs**

Under the United States, Mexico, Canada Trade Agreement (USMCA), Mexican tomatoes exported to the United States enter tariff-free. However, most Mexican fresh tomato exports to the U.S. market face a 17.09 percent anti-dumping duty (see policy section above).

Mexico enjoys tariff-free access to Canada, the European Union, Japan, the United Kingdom, and Central and South America for tomatoes.

**Attachments:**

No Attachments