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Report Highlights:

Mexico's 2025 tomato production is forecast at 3.1 million metric tons (MMT), a three percent decrease year-on-year based on continuing drought conditions in the main production areas and lower projected planting for the autumn-winter season. Producers are expected to reduce planting in response to U.S. anti-dumping duties (ADDs) scheduled to enter into force on July 14, 2025. Mexico's tomato exports are forecast to reach 1.96 MMT in 2025, including 1.83 MMT to the United States, down five percent as producers and exporters adjust to U.S. ADDs.

Executive Summary

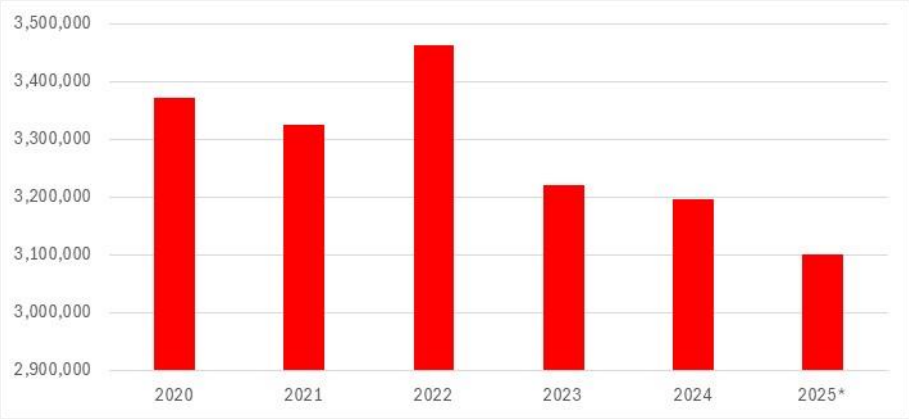
Mexico's 2025 tomato production is forecast at 3.1 million metric tons (MMT), down three percent compared to 2024, largely attributed to ongoing water scarcity and temperature fluctuations constraining production in the northern regions, particularly in Sinaloa, the country's top tomato-producing state. Additionally, on April 14, 2025, the U.S. Department of Commerce announced its intent to withdraw from the 2019 Agreement Suspending the Antidumping Investigation on Fresh Tomatoes from Mexico, with termination effective in 90 days. Upon the termination of this agreement, Commerce will institute an antidumping duty (ADD) order on July 14, 2025, resulting in duties of 20.91% on most imports of tomatoes from Mexico. The scheduled entry into force of ADDs is projected to result in a reduction in investment and planting by export-oriented tomato producers, particularly during the autumn–winter production cycle, when export volumes are typically highest.

Despite production and export challenges, demand remains stable in both domestic and international markets. The continued expansion of protected agriculture, including greenhouses, shade houses, and substrate-based systems, has helped maintain high average yields, moderating what could have been a steeper decline in overall production. The United States continues to be Mexico's top tomato export market with a 93 percent share. Mexico's total exports are forecast to reach 1.96 MMT in 2025 and a value of USD 3.2 billion, down five percent compared to the previous year due reduced demand resulting from higher retail prices following application of ADDs beginning in July.

Production

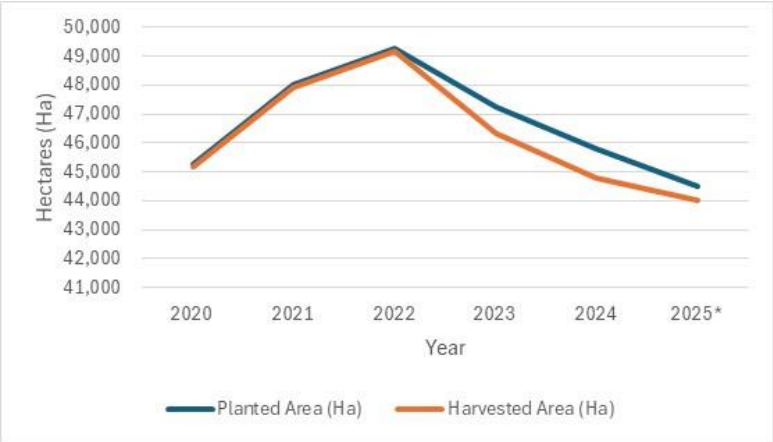
Mexico's 2025 tomato production is forecast to decrease three percent year-on-year to 3.1 MMT due to ongoing unfavorable temperature and rainfall conditions. In addition, producers are expected to reduce planting in the autumn-winter season in response to U.S. ADDs on imports of most Mexican tomatoes, set to take effect in July 2025. Production likewise declined in 2024 on drought conditions, falling one percent to 3.19 MMT compared to 3.22 MMT in 2023.

Graph 1: Mexico Tomato Production



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

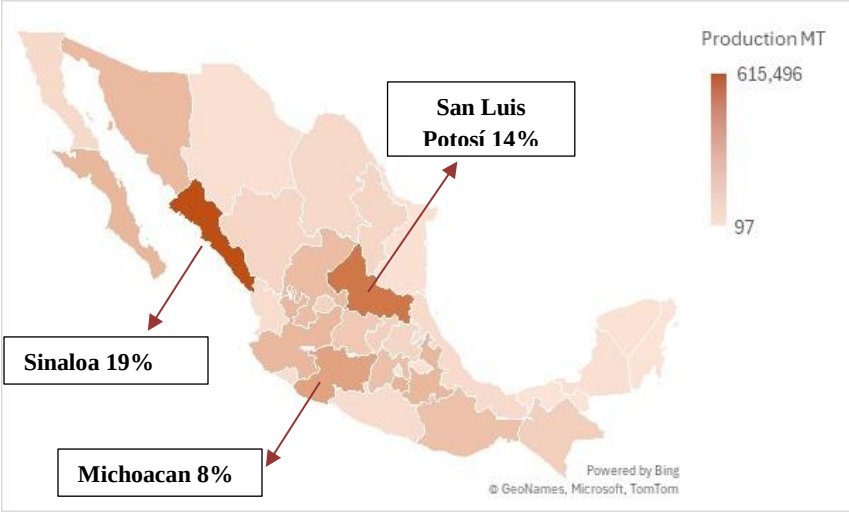
Graph 2: Mexico Tomato Planted and Harvested Area



Data Source: SIAP
*Post Forecast

Protected agriculture is the main driver for tomato production in the country, with greenhouse production stable at 70 percent and the remaining 30 percent in open fields. The top five tomato production states deliver over 52 percent of national production. Sinaloa remains the leading tomato producer with 19 percent of national production, followed by San Luis Potosí (14 percent), Michoacán (8 percent), Baja California Sur (6 percent), and Morelos (5 percent).
Mexico produces tomatoes year-round, with production shifting among regions on a seasonal basis. The northwestern state of Sinaloa dominates winter production (December–April), supplying over 80 percent of the U.S.-destined tomatoes and about 22 precent of national production. From late spring through autumn, production moves to central and western Mexico, with San Luis Potosí, Michoacán, Jalisco, Sonora, and Baja California Sur ramping up production.

Map 1: Main Tomato Production Areas 2024

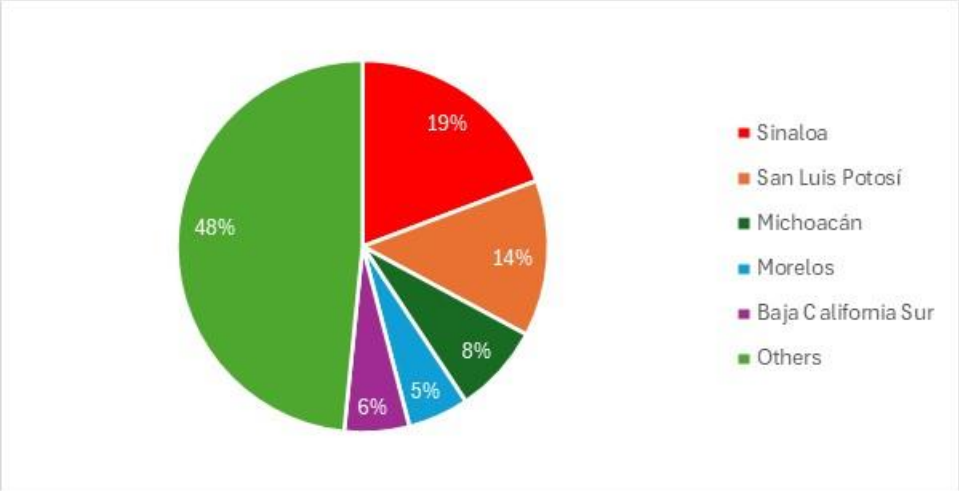


Data Source: SIAP

Yields have improved over the past five years with the adoption of better management practices. In general, protected fields can yield several times more than open fields. Growers report average harvests of about 66 pounds per square meter, with yields attributed to precise water and nutrient management, greenhouse climate control, and improved varieties. Mexican producers benefit from favorable climate conditions, including adequate sunshine that preclude the need for artificial light. Many large growers use drip irrigation and fertigation to conserve water and optimize plant nutrition. Experiments with grafting have also raised efficiency, with some growers reporting that grafted rootstocks cut seedling failures and boost overall production.

Mexico produces a broad range of tomato varieties, both for fresh consumption and processing. Common types include saladette, bola, and cherry tomatoes, valued for their flavor, yield, and adaptability across culinary uses. In recent years, production of specialty and gourmet varieties such as grape, cocktail, heirloom, and multicolored cherry tomatoes has expanded, mostly in western Mexico, driven by demand in premium export markets, particularly the United States.
These high-value varieties are often grown in protected environments to ensure consistency in size, sweetness, and appearance. Additionally, tomatoes destined for processing industries are selected for their high solids content and robust flavor, making them ideal for sauces, pastes, and canned products.

Graph 3: 2024 Mexican Tomato Production by State



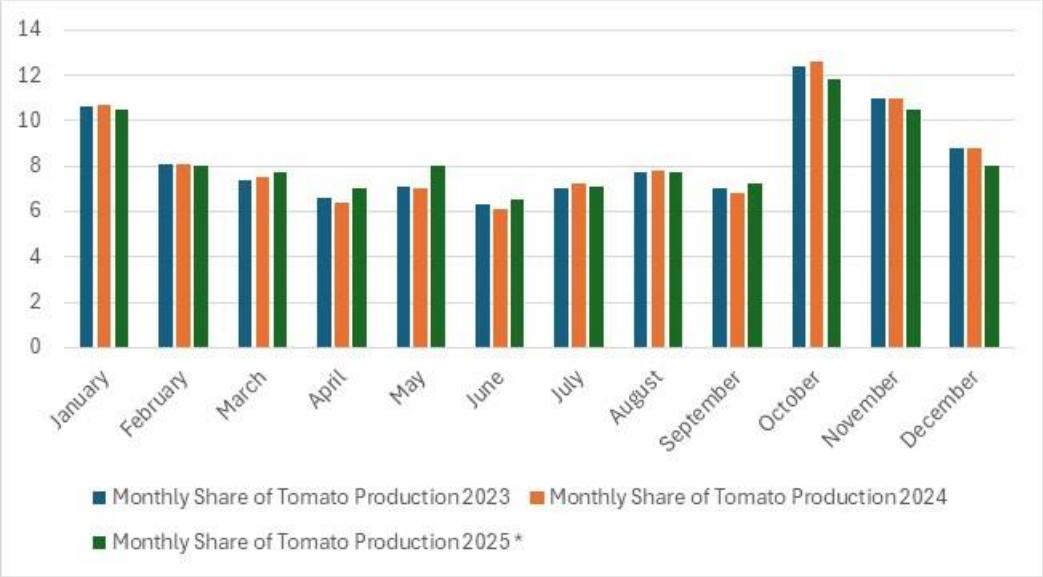
Data Source: SIAP

Growing Conditions

Mexico's varied geography and climate enable year-round tomato cultivation. Producers capitalize on the temperate highlands, arid northern plains, and coastal lowlands through staggered planting cycles, ensuring a continuous supply across multiple regions. This geographic flexibility enables the production of both conventional tomatoes (saladette and bola) and specialty types (grape, heirloom, and cocktail).

Cooler high-elevation nights promote fruit development and sweetness, especially for premium varieties grown under protection. Warmer coastal and central areas support robust open-field and shade house production for processing and domestic markets.

Graph 4: Monthly Share of Tomato Production



Data Source: SIAP
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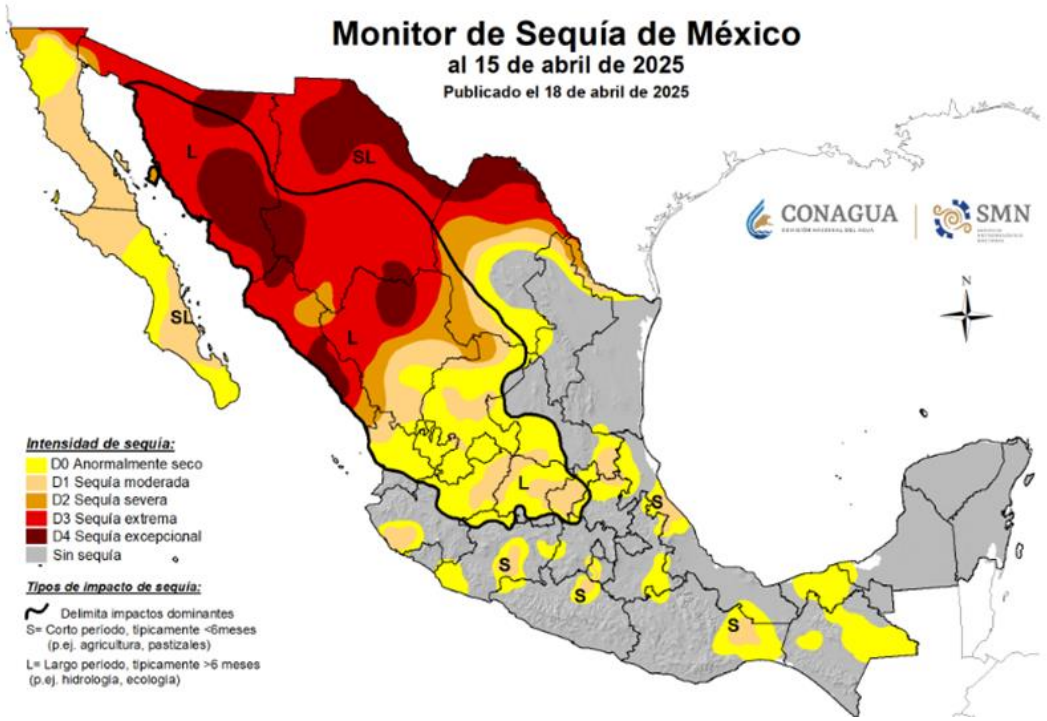
Data from Mexico's National Water Commission (CONAGUA) and National Meteorological Service (SMN) show severe and worsening drought conditions in Sinaloa, Mexico's leading tomato producing state. Nearly the entire state is affected by extreme drought (category D3 on Map 2) and faces long-term (L) water deficits and persistent heat for more than six months. Large portions of the state are impacted by exceptional drought (D4), the highest drought level. The absence of adequate moisture in both soil and reservoirs limits irrigation capacity, stressing existing crops and discouraging new planting, especially given the newly added factor of U.S. anti-dumping duties on Mexican tomato exports.

Map 2: Mexico Drought Conditions April 15th 2025



Source: National Water Commission (CONAGUA) and National Meteorological Service (SMN)

Consumption

According to the Government of Mexico, the annual per capita consumption of tomatoes is stable at 12.7 kilograms (28 pounds) per person. Tomatoes remain the number one vegetable consumed by Mexicans despite price increases in 2024 caused by weather conditions impacting yields in the summer months.

Tomatoes are considered part of the basic food basket that Mexican households purchase on a weekly basis. They are consumed fresh and also commonly used in sauces (salsas), soups, stews, and main dishes. Tomatoes are used to balance sweetness and acidity in various Mexican dishes.

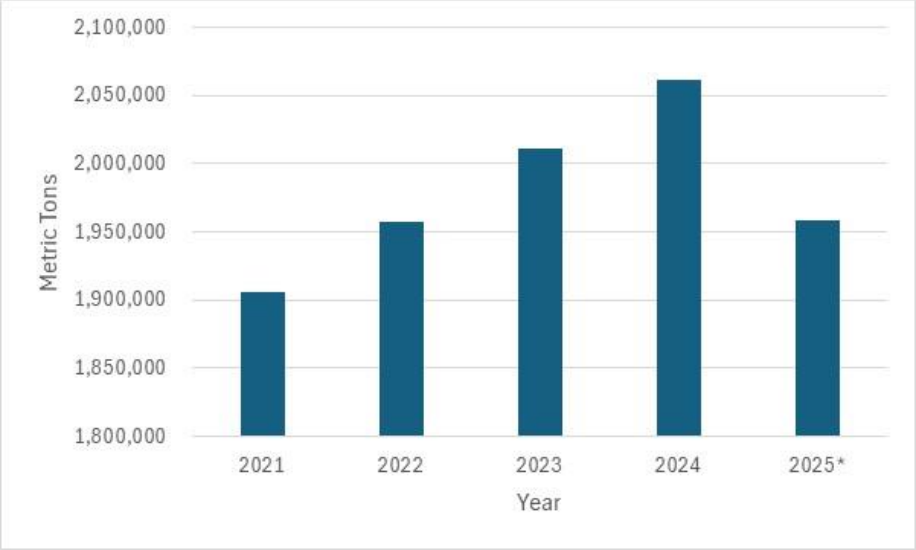
Trade

Tomatoes are among Mexico's top five agricultural exports. The United States is Mexico's number one tomato export market, with a 93 percent share. Total 2025 tomato exports are forecast down five percent year-on-year to 1.96 MMT, with a value of USD 3.2 billion. Exports to the United States are forecast at 1.83 MMT, five percent lower than 2024, with a value of USD 2.98 billion. The announced withdrawal of the Tomato Suspension Agreement and imposition of a 20.91 percent anti-dumping duty on all Mexican tomato exports to the United States by July 14, 2025 are projected to reduce exports, as producers and exporters adjust to higher costs and market uncertainty. Exporters are expected to seek

markets where their produce benefits from a low or zero tariff, particularly for the autumn-winter crop, to offset tariffs on tomatoes exported to the United States.

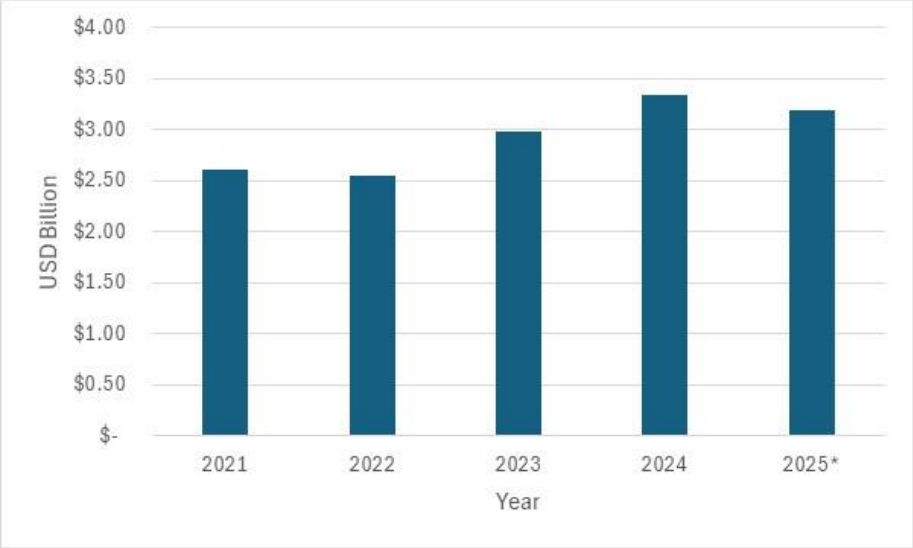
According to Government of Mexico data (Secretariat of Economy), Mexico's total 2024 tomato exports were 2.06 MMT with a value of USD 3.34 billion.

Graph 5: Mexican Tomato Exports (MT)



Data Source: Trade Data Monitor
*Post Forecast

Graph 6: Mexican Tomato Exports (USD Billion)



Data Source: Trade Data Monitor
*Post Forecast

Table 1: Tariffs on Mexico's Tomato Exports

Export Destination	HS Code	Old Tariff Rate (Pre-July 14, 2025)	New Tariff Rate (From July 14, 2025)	Basis/Arrangement	Notes
United States	0702	0% (if compliant with Suspension Agreement)	20.91% antidumping duty	USMCA, but AD duty overrides	Applies to most fresh tomato exports from Mexico.
Canada	0702	0%	0%	USMCA	No antidumping duties; remain duty-free.
Other countries	0702	Varies (generally low or 0%)	Varies (generally low or 0%)	FTA/MFN/WTO	No new duties announced; subject to local policies.

Attachments:

No Attachments