

# **Tomato Processing Market Report by Product Type (Sauces, Paste, Canned Tomatoes, Ketchup, Juice, and Others), Distribution Channel (Business to Business, Retail Market), and Region 2024-2032**

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## **Abstracts**

The global tomato processing market size reached 46.9 Million Tons in 2023. Looking forward, IMARC Group expects the market to reach 63.3 Million Tons by 2032, exhibiting a growth rate (CAGR) of 3.3% during 2024-2032. The escalating demand for processed products, such as sauces, pastes, and ketchup, emerging culinary trends, such as the farm-to-table movement and the growing investment in research and development are among the key factors driving the market growth.

Tomato processing is the series of steps taken to transform raw tomatoes into various forms that are easier to store, transport, and use in different recipes. The main aim of this process is to extend the shelf life of tomatoes while preserving their nutritional value, taste, and texture. The most common products resulting from tomato processing are canned tomatoes, tomato sauce, ketchup, and tomato paste. The typical process starts with sorting and washing the fresh tomatoes to remove impurities. Then, they are often blanched to make peeling easier, followed by chopping or crushing. Heat treatment is then applied, often via pasteurization, to kill bacteria and prolong shelf life. Moreover, the processed tomatoes are packed in a sterile environment, usually in cans or jars, to prevent contamination. This industry plays a significant role in food manufacturing, allowing consumers to enjoy tomato-based products year-round and offering a convenient option for quick meal preparation.

One of the primary market drivers for the tomato processing industry is the rising demand for convenience foods. In today's fast-paced society, many consumers are seeking quick and easy meal solutions. Processed tomato products, such as sauces,

pastes, and ketchup fit this demand perfectly. Therefore, this is significantly supporting the market. Along with this, manufacturers are continuously innovating to offer products that are convenient and healthier, with reduced sodium and sugar levels, to attract a wider consumer base. In addition, demographic changes, including the increasing number of millennials and Gen Z consumers who prefer quick but healthy food options, are pushing demand. Their food choices often include products that are easy to cook and rich in nutrients, making processed tomatoes an attractive option. Apart from this, emerging culinary trends, such as the farm-to-table movement and the increasing popularity of organic, non-GMO products, are also impacting the market. Processors who adapt to these trends by offering specialty products are finding new avenues for growth. Moreover, investment in research and development for creating products with longer shelf life, better nutritional value, and diverse flavor profiles is creating a positive market outlook.

#### Tomato Processing Market Trends/Drivers: Health and Nutritional Benefits

The health and nutritional benefits of tomatoes are well-documented, and this is another significant driver for the tomato processing industry. Tomatoes are rich in essential nutrients, such as vitamins A and C, and they are a significant source of lycopene, an antioxidant that has been linked to various health benefits. Additionally, processed tomato products can sometimes be even more beneficial than fresh tomatoes since the processing can increase the bioavailability of certain nutrients. This has led to a surge in consumer interest in processed tomato products that are marketed as being healthful. Brands are increasingly highlighting the nutritional aspects on product labels and through marketing campaigns, attracting consumers who are conscious about their dietary choices. This shift towards health-focused consumption is expected to continue to drive market growth in the tomato processing industry.

#### Globalization of Cuisine

Globalization has significantly influenced eating habits worldwide, introducing a variety of cuisines to different regions. As a result, dishes that require processed tomato products as a base, such as Italian, Mexican, and Indian cuisines, have gained immense popularity across the globe. This culinary integration creates a strong demand for processed tomato products like sauces, purees, and pastes. In confluence with this, the influence of international travel and the proliferation of global restaurant chains have also familiarized consumers with diverse food cultures. This familiarity drives the demand for the ingredients that make these dishes unique, including processed tomato

products. Moreover, the desire for authentic global cuisine is, therefore, a powerful market driver, spurring growth in the tomato processing industry.

### Advancements in Processing Technology

In recent years, technological advancements in food processing have significantly impacted the tomato processing industry. Innovations in machinery, such as advanced sorting and grading systems, have streamlined the process, reducing waste and improving yield. Additionally, developments in packaging technology, such as vacuum sealing and the use of preservatives, have extended the shelf life of processed tomato products, making them more appealing to both retailers and consumers. This improves the profitability of manufacturers and makes the products more accessible to a broader market. These advances in technology enable the production of high-quality, consistent, and long-lasting products, which, in turn, instills consumer trust and drives market demand.

### Tomato Processing Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global tomato processing market report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product type and distribution channel.

### Breakup by Product Type:

Sauces

Food Services Market

Home Users

Paste

Food Services Market

Home Users

Canned Tomatoes

Food Services Market

Home Users

Ketchup

Food Services Market

Home Users

Juice

Food Services Market

Home Users

Others

Food Services Market

Home Users

Sauces represent the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product type. This includes sauces (food services market, and home users), paste (food services market, and home users), canned tomatoes (food services market, and home users), ketchup (food services market, and home users), juice (food services market, and home users), and others (food services market, and home users). According to the report, sauces accounted for the largest market share.

The tomato processing industry experiences several market drivers that propel the growth and development of sauces. Additionally, the rising consumer demand for convenience foods significantly influences the rise in production. As more consumers seek easy-to-cook options, ready-made sauces made from tomatoes serve as a staple ingredient. Another significant driver is the global adoption of Western cuisine, which often incorporates tomato-based sauces like ketchup, marinara, and barbecue sauce. Growing health awareness has also made an impact. As consumers become increasingly conscious of their food choices, there's a rising preference for organic and preservative-free sauce options, pushing manufacturers to adapt. Along with this, advances in packaging technology offer extended shelf-life and ease of use, making these products even more attractive to consumers. The impact of e-commerce can't be overlooked either; online platforms make it easier for consumers to access a wide variety of tomato-based sauces. Moreover, seasonality is less of a concern for processed products, enabling year-round availability.

Breakup by Distribution Channel:

Business to Business

Retail Market

Supermarkets/Hypermarkets

Specialty Stores

Convenience Stores

Online

Others

Retail market accounts for the majority of the market share

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes business to business, and retail market (supermarkets/hypermarkets, specialty stores, convenience stores, online, and others). According to the report, the retail market accounted for the largest market share.

The retail distribution channel plays a pivotal role in shaping the landscape of the tomato processing industry. One of the key market drivers is the escalating demand for packaged and processed tomato products, such as sauces, purees, and ketchups, among consumers who value convenience. Supermarkets and hypermarkets, due to their broad product assortments, serve as key retail outlets that cater to this demand effectively. Along with this, the trend of private labeling has given a boost to retail stores, as they can offer quality products at competitive prices. In addition, the growing influence of organic and clean-label products is also significant. Many retailers are expanding their product lines to include healthier, natural options to cater to consumer consciousness about wellness and nutrition. Apart from this, the burgeoning impact of e-commerce has compelled traditional retailers to adapt by integrating online and offline sales channels, creating an omnichannel experience for consumers. Technological advancements, such as QR codes and contactless payments further ease the shopping experience, promoting retail as a preferred channel. Geographically, the expansion of retail networks into suburban and rural areas is facilitating greater consumer access to processed tomato products.

#### Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa  
Turkey  
Iran  
Others

Europe exhibits a clear dominance, accounting for the largest tomato processing market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa (Turkey, Iran and others). According to the report, Europe exhibited the largest segment.

The Europe tomato processing industry is influenced by a variety of market drivers that contribute to its sustained growth. One of the main catalysts is the region's robust food culture, which heavily relies on tomato-based products like sauces, pastes, and ketchups. The widespread consumption of Mediterranean cuisine, known for its healthy and flavorful ingredients, including tomatoes, fuels demand. Moreover, European consumers are increasingly health-conscious, showing a growing preference for organic and GMO-free tomato products. This has led manufacturers to adopt sustainable farming practices and cleaner processing methods. Another driver is technological advancements in agriculture and processing, improving yields and reducing waste, thereby making the industry more efficient. The stringent food safety regulations in Europe further ensure high-quality standards, attracting consumer trust and boosting sales. Additionally, the rise of e-commerce has expanded market reach, allowing manufacturers to cater to a broader consumer base. Trade agreements within the European Union facilitate easier cross-border distribution, making products widely accessible. Lastly, ongoing R&D initiatives in the sector aim to develop innovative

products that meet evolving consumer preferences, thereby driving demand. In summary, culinary traditions, health consciousness, technological progress, regulatory frameworks, e-commerce, and intra-region trade are key market drivers for the tomato processing industry in Europe.

#### Competitive Landscape:

The key players are working closely with farmers and suppliers to secure a steady supply of high-quality tomatoes, ensuring the availability of raw materials for their products. They employ advanced processing techniques to convert fresh tomatoes into a range of products, such as tomato paste, canned tomatoes, ketchup, sauces, and more. Along with this, the growing investments in quality control measures to ensure that their tomato products meet safety and taste standards is positively influencing the market. In addition, tomato processing companies often expand their market presence through distribution agreements, partnerships, or entering new geographical markets. This helps them reach a wider audience. Apart from this, there's been a focus on sustainability. Companies are adopting eco-friendly practices, reducing waste, and exploring energy-efficient processing methods to minimize their environmental impact. Furthermore, ongoing research and development efforts to improve production processes is contributing to the market.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

The Morning Star Company  
COFCO Tunhe Tomato Co., Ltd.  
Xinjiang Chalkis Company Ltd  
Ingomar Packing Co  
ConAgra Brands, Inc  
Olam International  
Los Gatos Tomato Products  
Campbell Soup Company  
Toma-Tek (Neil Jones Food Company)  
Stanislaus Food Products  
C.I.O. -Consorzio Interregionale Ortofrutticoli S.c.a.r.l.  
Sugal Group  
Pacific Coast Producers  
Kagome Co., Ltd.  
CONESA Group

Tat Gida Sanayi A.S.

Del Monte Foods, Inc

Xinjiang Guannong Tomato Products Co. Ltd.

Mutti SpA Industria

Recent Developments:

In May 2023, Pacific Coast Producers received \$890,000 in state funds for climate investment to cut emissions at its Woodland tomato processing plant, which is projected to increase efficiency.

In February 2022, Olam International announced the news to sell off the northern 15-acre tomato processing portion of the company but keep the remaining 10 acres of the processing facility property for its granulated garlic business.

In March 2020, NEC Corporation announced the execution of a strategic collaboration contract with Kagome Co., Ltd. to introduce farm management support services for top tomato processing industries using artificial intelligence (AI).

Key Questions Answered in This Report

1. What was the size of the global tomato processing market in 2023?
2. What is the expected growth rate of the global tomato processing market during 2024-2032?
3. What are the key factors driving the global tomato processing market?
4. What has been the impact of COVID-19 on the global tomato processing market?
5. What is the breakup of the global tomato processing market based on the product type?
6. What is the breakup of the global tomato processing market based on the distribution channel?
7. What are the key regions in the global tomato processing market?
8. Who are the key players/companies in the global tomato processing market?



## Contents

### 1 PREFACE

### 2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### 3 EXECUTIVE SUMMARY

### 4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

### 5 GLOBAL TOMATO PROCESSING MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### 6 MARKET BREAKUP BY PRODUCT TYPE

- 6.1 Sauces
  - 6.1.1 Food Services Market
    - 6.1.1.1 Market Trends
    - 6.1.1.2 Market Forecast
  - 6.1.2 Home Users

6.1.2.1 Market Trends

6.1.2.2 Market Forecast

## 6.2 Paste

6.2.1 Food Services Market

6.2.1.1 Market Trends

6.2.1.2 Market Forecast

6.2.2 Home Users

6.2.2.1 Market Trends

6.2.2.2 Market Forecast

## 6.3 Canned Tomatoes

6.3.1 Food Services Market

6.3.1.1 Market Trends

6.3.1.2 Market Forecast

6.3.2 Home Users

6.3.2.1 Market Trends

6.3.2.2 Market Forecast

## 6.4 Ketchup

6.4.1 Food Services Market

6.4.1.1 Market Trends

6.4.1.2 Market Forecast

6.4.2 Home Users

6.4.2.1 Market Trends

6.4.2.2 Market Forecast

## 6.5 Juice

6.5.1 Food Services Market

6.5.1.1 Market Trends

6.5.1.2 Market Forecast

6.5.2 Home Users

6.5.2.1 Market Trends

6.5.2.2 Market Forecast

## 6.6 Others

6.6.1 Food Services Market

6.6.1.1 Market Trends

6.6.1.2 Market Forecast

6.6.2 Home Users

6.6.2.1 Market Trends

6.6.2.2 Market Forecast

## **7 MARKET BREAKUP BY DISTRIBUTION CHANNEL**

- 7.1 Business to Business
  - 7.1.1 Market Trends
  - 7.1.2 Market Forecast
- 7.2 Retail Market
  - 7.2.1 Supermarkets/Hypermarkets
    - 7.2.1.1 Market Trends
    - 7.2.1.2 Market Forecast
  - 7.2.2 Specialty Stores
    - 7.2.2.1 Market Trends
    - 7.2.2.2 Market Forecast
  - 7.2.3 Convenience Stores
    - 7.2.3.1 Market Trends
    - 7.2.3.2 Market Forecast
  - 7.2.4 Online
    - 7.2.4.1 Market Trends
    - 7.2.4.2 Market Forecast
  - 7.2.5 Others
    - 7.2.5.1 Market Trends
    - 7.2.5.2 Market Forecast

## **8 MARKET BREAKUP BY REGION**

- 8.1 North America
  - 8.1.1 United States
    - 8.1.1.1 Market Trends
    - 8.1.1.2 Market Forecast
  - 8.1.2 Canada
    - 8.1.2.1 Market Trends
    - 8.1.2.2 Market Forecast
- 8.2 Asia Pacific
  - 8.2.1 China
    - 8.2.1.1 Market Trends
    - 8.2.1.2 Market Forecast
  - 8.2.2 Japan
    - 8.2.2.1 Market Trends
    - 8.2.2.2 Market Forecast
  - 8.2.3 India
    - 8.2.3.1 Market Trends

- 8.2.3.2 Market Forecast
- 8.2.4 South Korea
  - 8.2.4.1 Market Trends
  - 8.2.4.2 Market Forecast
- 8.2.5 Australia
  - 8.2.5.1 Market Trends
  - 8.2.5.2 Market Forecast
- 8.2.6 Indonesia
  - 8.2.6.1 Market Trends
  - 8.2.6.2 Market Forecast
- 8.2.7 Others
  - 8.2.7.1 Market Trends
  - 8.2.7.2 Market Forecast
- 8.3 Europe
  - 8.3.1 Germany
    - 8.3.1.1 Market Trends
    - 8.3.1.2 Market Forecast
  - 8.3.2 France
    - 8.3.2.1 Market Trends
    - 8.3.2.2 Market Forecast
  - 8.3.3 United Kingdom
    - 8.3.3.1 Market Trends
    - 8.3.3.2 Market Forecast
  - 8.3.4 Italy
    - 8.3.4.1 Market Trends
    - 8.3.4.2 Market Forecast
  - 8.3.5 Spain
    - 8.3.5.1 Market Trends
    - 8.3.5.2 Market Forecast
  - 8.3.6 Russia
    - 8.3.6.1 Market Trends
    - 8.3.6.2 Market Forecast
  - 8.3.7 Others
    - 8.3.7.1 Market Trends
    - 8.3.7.2 Market Forecast
- 8.4 Latin America
  - 8.4.1 Brazil
    - 8.4.1.1 Market Trends
    - 8.4.1.2 Market Forecast

#### 8.4.2 Mexico

##### 8.4.2.1 Market Trends

##### 8.4.2.2 Market Forecast

#### 8.4.3 Others

##### 8.4.3.1 Market Trends

##### 8.4.3.2 Market Forecast

#### 8.5 Middle East and Africa

##### 8.5.1 Turkey

##### 8.5.1.1 Market Trends

##### 8.5.1.2 Market Forecast

##### 8.5.2 Iran

##### 8.5.2.1 Market Trends

##### 8.5.2.2 Market Forecast

##### 8.5.3 Others

##### 8.5.3.1 Market Trends

##### 8.5.3.2 Market Forecast

### **9 SWOT ANALYSIS**

#### 9.1 Overview

#### 9.2 Strengths

#### 9.3 Weaknesses

#### 9.4 Opportunities

#### 9.5 Threats

### **10 VALUE CHAIN ANALYSIS**

#### 10.1 Overview

#### 10.2 Inbound Logistics

#### 10.3 Operations

#### 10.4 Outbound Logistics

#### 10.5 Marketing and Sales

#### 10.6 End Consumers

### **11 PORTERS FIVE FORCES ANALYSIS**

#### 11.1 Overview

#### 11.2 Bargaining Power of Buyers

#### 11.3 Bargaining Power of Suppliers

- 11.4 Degree of Competition
- 11.5 Threat of New Entrants
- 11.6 Threat of Substitutes

## **12 PRICE ANALYSIS**

- 12.1 Key Price Indicators
- 12.2 Price Structure
- 12.3 Price Trends

## **13 COMPETITIVE LANDSCAPE**

- 13.1 Market Structure
- 13.2 Market Share of Key Players

## **14 TOMATO PASTE AND TOMATO SAUCE MANUFACTURING PROCESS**

- 14.1 Product Overview
- 14.2 Detailed Process Flow
- 14.3 Various Types of Unit Operations Involved
- 14.4 Mass Balance and Raw Material Requirements

## **15 PROJECT DETAILS, REQUIREMENTS AND COSTS INVOLVED**

- 15.1 Land Requirements and Expenditures
- 15.2 Construction Requirements and Expenditures
- 15.3 Plant Machinery
- 15.4 Machinery Pictures
- 15.5 Raw Material Requirements and Expenditures
- 15.6 Raw Material and Final Product Pictures
- 15.7 Packaging Requirements and Expenditures
- 15.8 Transportation Requirements and Expenditures
- 15.9 Utility Requirements and Expenditures
- 15.10 Manpower Requirements and Expenditures
- 15.11 Other Capital Investments

## **16 LOANS AND FINANCIAL ASSISTANCE**

## **17 PROJECT ECONOMICS**

- 17.1 Capital Cost of the Project
- 17.2 Techno-Economic Parameters
- 17.3 Product Pricing and Margins Across Various Levels of the Supply Chain
- 17.4 Taxation and Depreciation
- 17.5 Income Projections
- 17.6 Expenditure Projections
- 17.7 Financial Analysis
- 17.8 Profit Analysis

## **18 KEY PLAYER PROFILES**

- 18.1 The Morning Star Company
- 18.2 COFCO Tunhe Tomato Co., Ltd.
- 18.3 Xinjiang Chalkis Company Ltd
- 18.4 Ingomar Packing Co
- 18.5 ConAgra Brands, Inc
- 18.6 Olam International
- 18.7 Los Gatos Tomato Products
- 18.8 Campbell Soup Company
- 18.9 Toma-Tek (Neil Jones Food Company)
- 18.10 Stanislaus Food Products
- 18.11 C.I.O. -Consorzio Interregionale Ortofrutticoli S.c.a.r.l.
- 18.12 Sugal Group
- 18.13 Pacific Coast Producers
- 18.14 Kagome Co., Ltd.
- 18.15 CONESA Group
- 18.16 Tat Gida Sanayi A.S.
- 18.17 Del Monte Foods, Inc
- 18.18 Xinjiang Guannong Tomato Products Co. Ltd.
- 18.19 Mutti SpA Industria

## List Of Tables

### LIST OF TABLES

Table 1: Global: Tomato Processing Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Tomato Processing Market Forecast: Breakup by Product Type (in Million US\$), 2024-2032

Table 3: Global: Tomato Processing Market Forecast: Breakup by Distribution Channel (in Million US\$), 2024-2032

Table 4: Global: Tomato Processing Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 5: Global: Tomato Processing Market: Competitive Structure

Table 6: Global: Tomato Processing Market: Key Players

Table 7: Tomato Processing Plant: Costs Related to Land and Site Development (in US\$)

Table 8: Tomato Processing Plant: Costs Related to Civil Works (in US\$)

Table 9: Tomato Processing Plant: Costs Related to Machinery Unit (in US\$)

Table 10: Tomato Processing Plant: Raw Material Requirements (in Tons/Day) and Expenditures (US\$/Ton)

Table 11: Tomato Processing Plant: Costs Related to Salaries and Wages (in US\$)

Table 12: Tomato Processing Plant: Costs Related to Other Capital Investments (in US\$)

Table 13: Details of Financial Assistance Offered by Financial Institutions

Table 14: Tomato Processing Plant: Capital Costs (in US\$)

Table 15: Tomato Processing Plant: Techno-Economic Parameters

Table 16: Tomato Processing Plant: Taxation and Depreciation

Table 17: Tomato Processing Plant: Income Projections (in US\$)

Table 18: Tomato Processing Plant: Expenditure Projections (in US\$)

Table 19: Tomato Processing Plant: Cash Flow Analysis Without Considering the Income Tax Liability (in US\$)

Table 20: Tomato Processing Plant: Cash Flow Analysis on Considering the Income Tax Liability (in US\$)

Table 21: Tomato Processing Plant: Profit and Loss Account



## List Of Figures

### LIST OF FIGURES

- Figure 1: Global: Tomato Processing Market: Major Drivers and Challenges
- Figure 2: Global: Tomato Processing Market: Sales Volume (in Million Tons), 2018-2023
- Figure 3: Global: Tomato Processing Market: Sales Value (in Billion US\$), 2018-2023
- Figure 4: Global: Tomato Processing Market: Breakup by Product Type (in %), 2023
- Figure 5: Global: Tomato Processing Market: Breakup by Distribution Channel (in %), 2023
- Figure 6: Global: Tomato Processing Market: Breakup by Region (in %), 2023
- Figure 7: Global: Tomato Processing Market Forecast: Sales Volume (in Million Tons), 2024-2032
- Figure 8: Global: Tomato Processing Market Forecast: Sales Value (in Billion US\$), 2024-2032
- Figure 9: Global: Tomato Sauce Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 10: Global: Tomato Sauce Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 11: Global: Tomato Sauce Market (Food Services): Sales Value (in Million US\$), 2018 & 2023
- Figure 12: Global: Tomato Sauce Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032
- Figure 13: Global: Tomato Sauce Market (Home Users): Sales Value (in Million US\$), 2018 & 2023
- Figure 14: Global: Tomato Sauce Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032
- Figure 15: Global: Tomato Paste Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 16: Global: Tomato Paste Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 17: Global: Tomato Paste Market (Food Services): Sales Value (in Million US\$), 2018 & 2023
- Figure 18: Global: Tomato Paste Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032
- Figure 19: Global: Tomato Paste Market (Home Users): Sales Value (in Million US\$), 2018 & 2023
- Figure 20: Global: Tomato Paste Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032
- Figure 21: Global: Canned Tomatoes Market: Sales Value (in Million US\$), 2018 & 2023

Figure 22: Global: Canned Tomatoes Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 23: Global: Canned Tomatoes Market (Food Services): Sales Value (in Million US\$), 2018 & 2023

Figure 24: Global: Canned Tomatoes Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032

Figure 25: Global: Canned Tomatoes Market (Home Users): Sales Value (in Million US\$), 2018 & 2023

Figure 26: Global: Canned Tomatoes Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032

Figure 27: Global: Tomato Ketchup Market: Sales Value (in Million US\$), 2018 & 2023

Figure 28: Global: Tomato Ketchup Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: Global: Tomato Ketchup Market (Food Services): Sales Value (in Million US\$), 2018 & 2023

Figure 30: Global: Tomato Ketchup Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032

Figure 31: Global: Tomato Ketchup Market (Home Users): Sales Value (in Million US\$), 2018 & 2023

Figure 32: Global: Tomato Ketchup Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032

Figure 33: Global: Tomato Juice Market: Sales Value (in Million US\$), 2018 & 2023

Figure 34: Global: Tomato Juice Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 35: Global: Tomato Juice Market (Food Services): Sales Value (in Million US\$), 2018 & 2023

Figure 36: Global: Tomato Juice Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032

Figure 37: Global: Tomato Juice Market (Home Users): Sales Value (in Million US\$), 2018 & 2023

Figure 38: Global: Tomato Juice Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032

Figure 39: Global: Other Products Market: Sales Value (in Million US\$), 2018 & 2023

Figure 40: Global: Other Products Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 41: Global: Other Products Market (Food Services): Sales Value (in Million US\$), 2018 & 2023

Figure 42: Global: Other Products Market Forecast (Food Services): Sales Value (in Million US\$), 2024-2032

Figure 43: Global: Other Products Market (Home Users): Sales Value (in Million US\$), 2018 & 2023

Figure 44: Global: Other Products Market Forecast (Home Users): Sales Value (in Million US\$), 2024-2032

Figure 45: Global: Tomato Processing (Business to Business) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 46: Global: Tomato Processing (Business to Business) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 47: Global: Tomato Processing (Retail) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 48: Global: Tomato Processing (Retail) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 49: Global: Tomato Processing (Supermarkets/Hypermarkets) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 50: Global: Tomato Processing (Supermarkets/Hypermarkets) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 51: Global: Tomato Processing (Specialty Stores) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 52: Global: Tomato Processing (Specialty Stores) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 53: Global: Tomato Processing (Convenience Stores) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 54: Global: Tomato Processing (Convenience Stores) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 55: Global: Tomato Processing (Online) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 56: Global: Tomato Processing (Online) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 57: Global: Tomato Processing (Other Distribution Channels) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 58: Global: Tomato Processing (Other Distribution Channels) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 59: North America: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 60: North America: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 61: United States: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 62: United States: Tomato Processing Market Forecast: Sales Value (in Million

US\$), 2024-2032

Figure 63: Canada: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 64: Canada: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 65: Asia Pacific: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 66: Asia Pacific: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 67: China: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 68: China: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 69: Japan: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 70: Japan: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 71: India: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 72: India: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 73: South Korea: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 74: South Korea: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 75: Australia: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 76: Australia: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 77: Indonesia: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 78: Indonesia: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 79: Others: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 80: Others: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 81: Europe: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 82: Europe: Tomato Processing Market Forecast: Sales Value (in Million US\$),

2024-2032

Figure 83: Germany: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 84: Germany: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 85: France: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 86: France: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 87: United Kingdom: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 88: United Kingdom: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 89: Italy: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 90: Italy: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 91: Spain: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 92: Spain: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 93: Russia: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 94: Russia: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 95: Others: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 96: Others: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 97: Latin America: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 98: Latin America: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 99: Brazil: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 100: Brazil: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 101: Mexico: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 102: Mexico: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 103: Others: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 104: Others: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 105: Middle East and Africa: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 106: Middle East and Africa: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 107: Turkey: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 108: Turkey: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 109: Iran: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 110: Iran: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 111: Others: Tomato Processing Market: Sales Value (in Million US\$), 2018 & 2023

Figure 112: Others: Tomato Processing Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 113: Global: Tomato Processing Industry: SWOT Analysis

Figure 114: Global: Tomato Processing Industry: Value Chain Analysis

Figure 115: Global: Tomato Processing Industry: Porter's Five Forces Analysis

Figure 116: Tomato Processing: Detailed Process Flow

Figure 117: Tomato Processing: Conversion Rate of Feedstocks

Figure 118: Tomato Processing Plant: Breakup of Capital Costs (in %)

Figure 119: Tomato Processing Industry: Profit Margins at Various Levels of the Supply Chain

Figure 120: Tomato Processing: Manufacturing Cost Breakup (in %)

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