

AgSeeds Season Review 2025



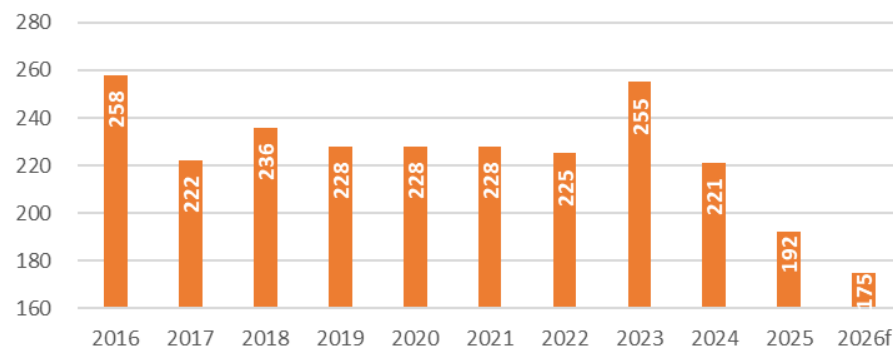
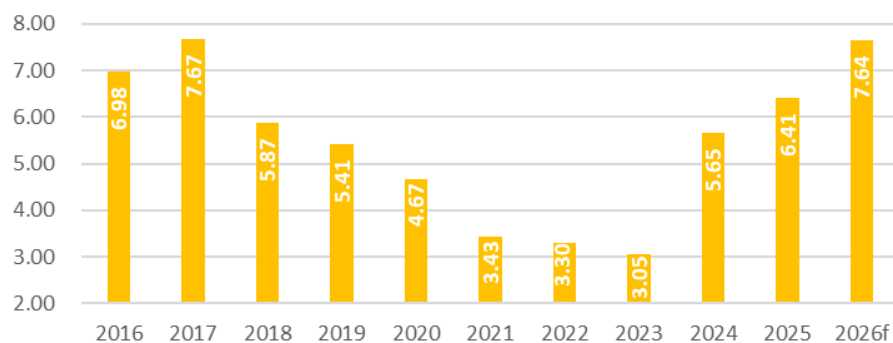
Finished Product Market



Supply and Demand: Movement

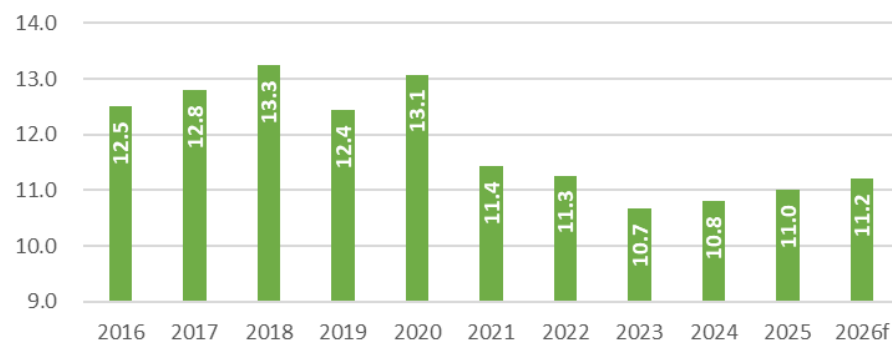
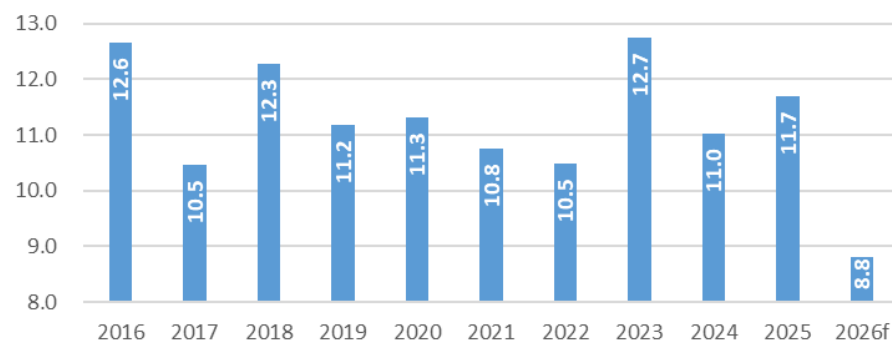


Carry In



Harvested Acres

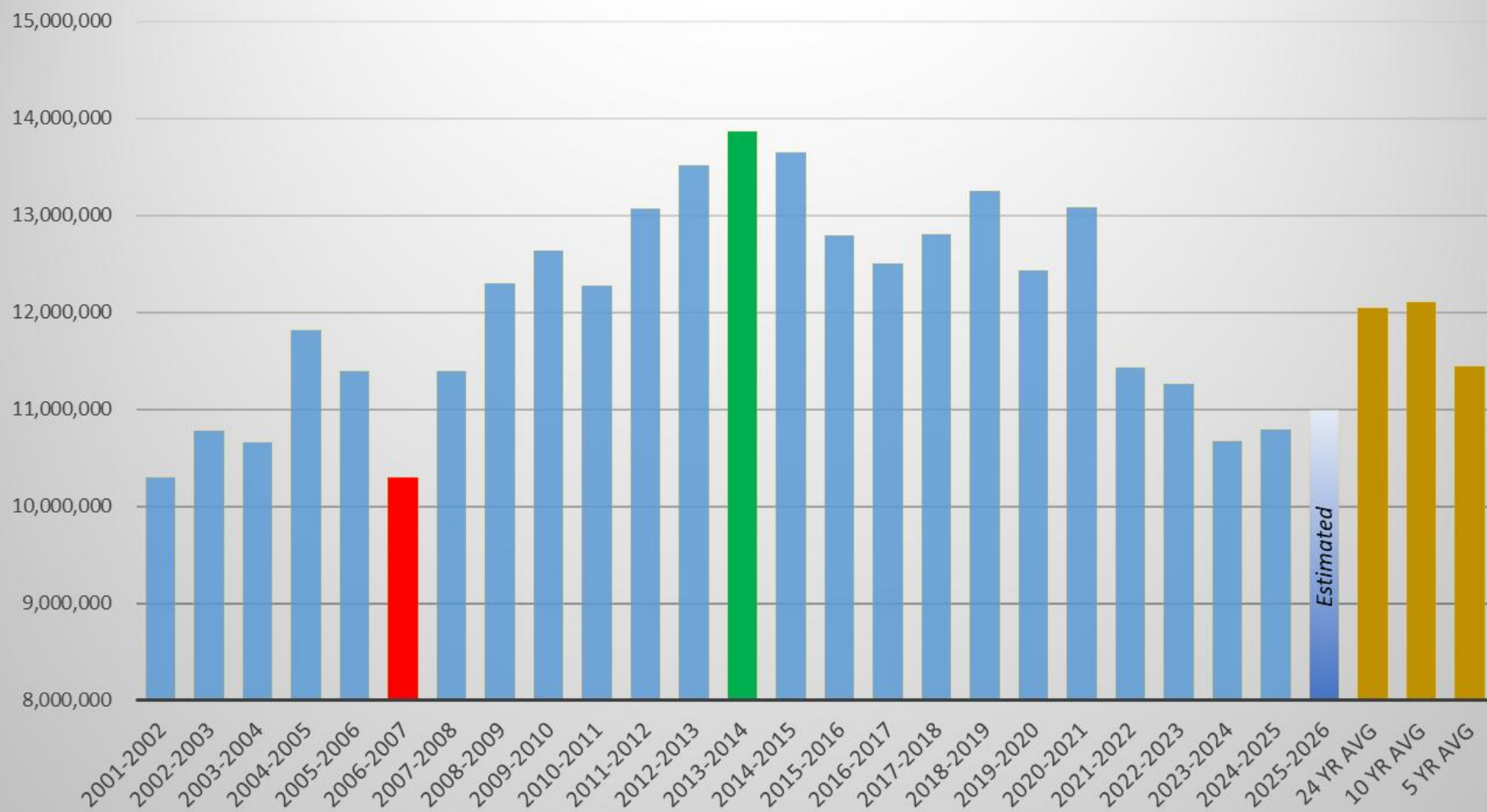
Pack



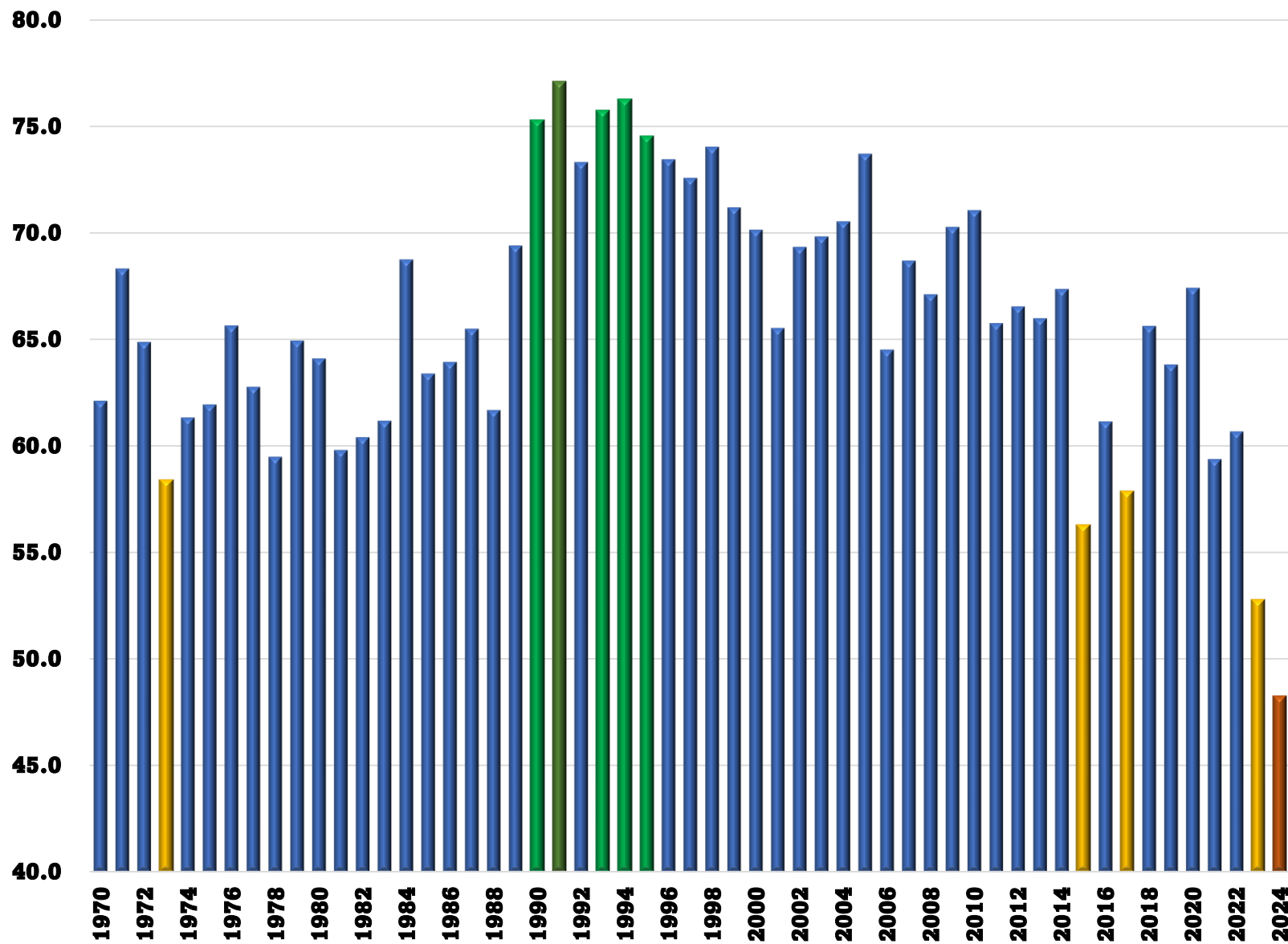
Disappearance



Supply and Demand: Disappearance



Per Capita Consumption

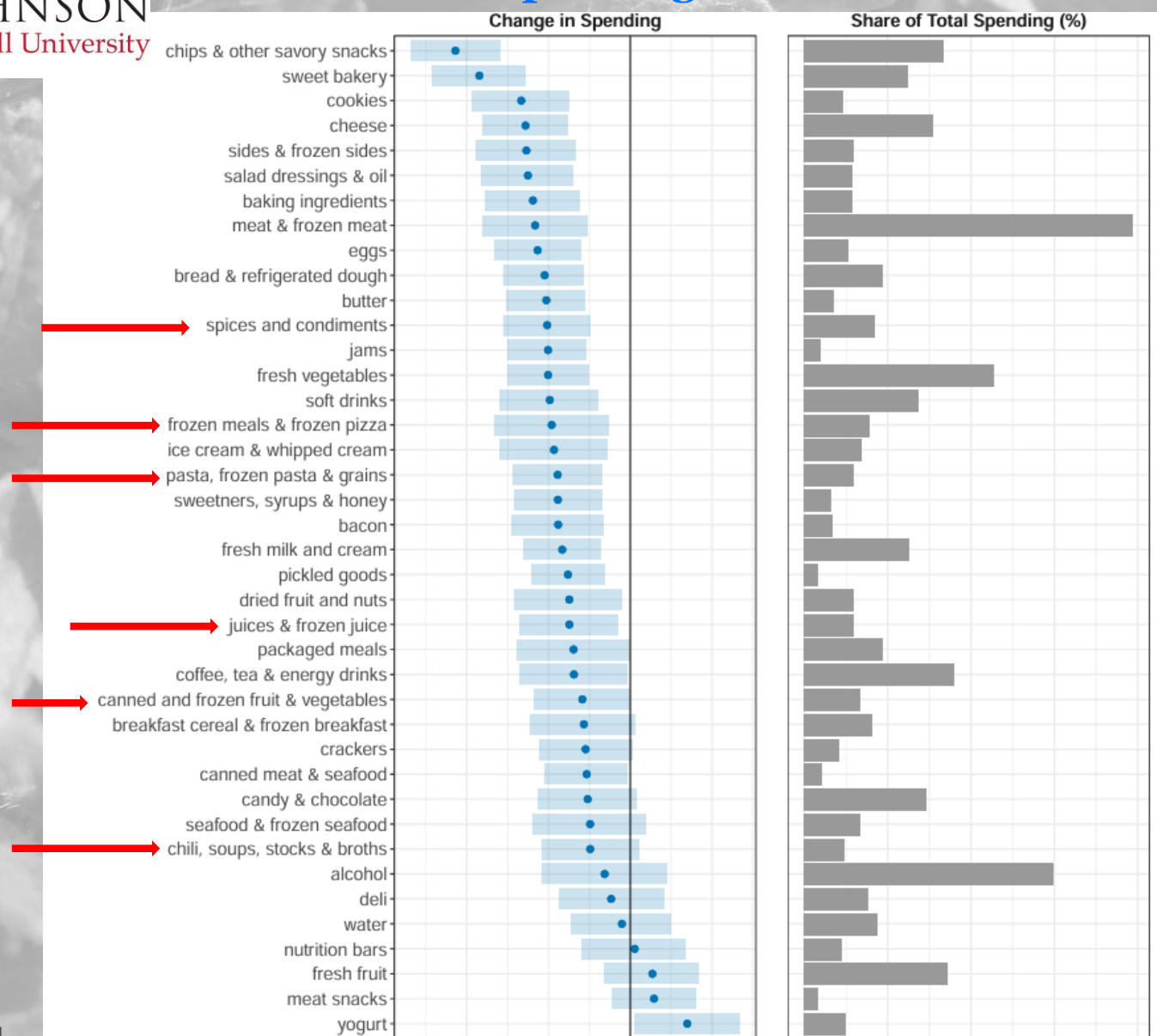


Scale: lbs per person



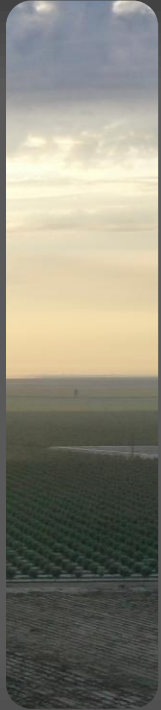
JOHNSON
Cornell University

GLP-1 Spending Trends



Notes: This first panel reports category-level spending changes in the first six months following GLP-1 adoption for the 40 largest grocery categories

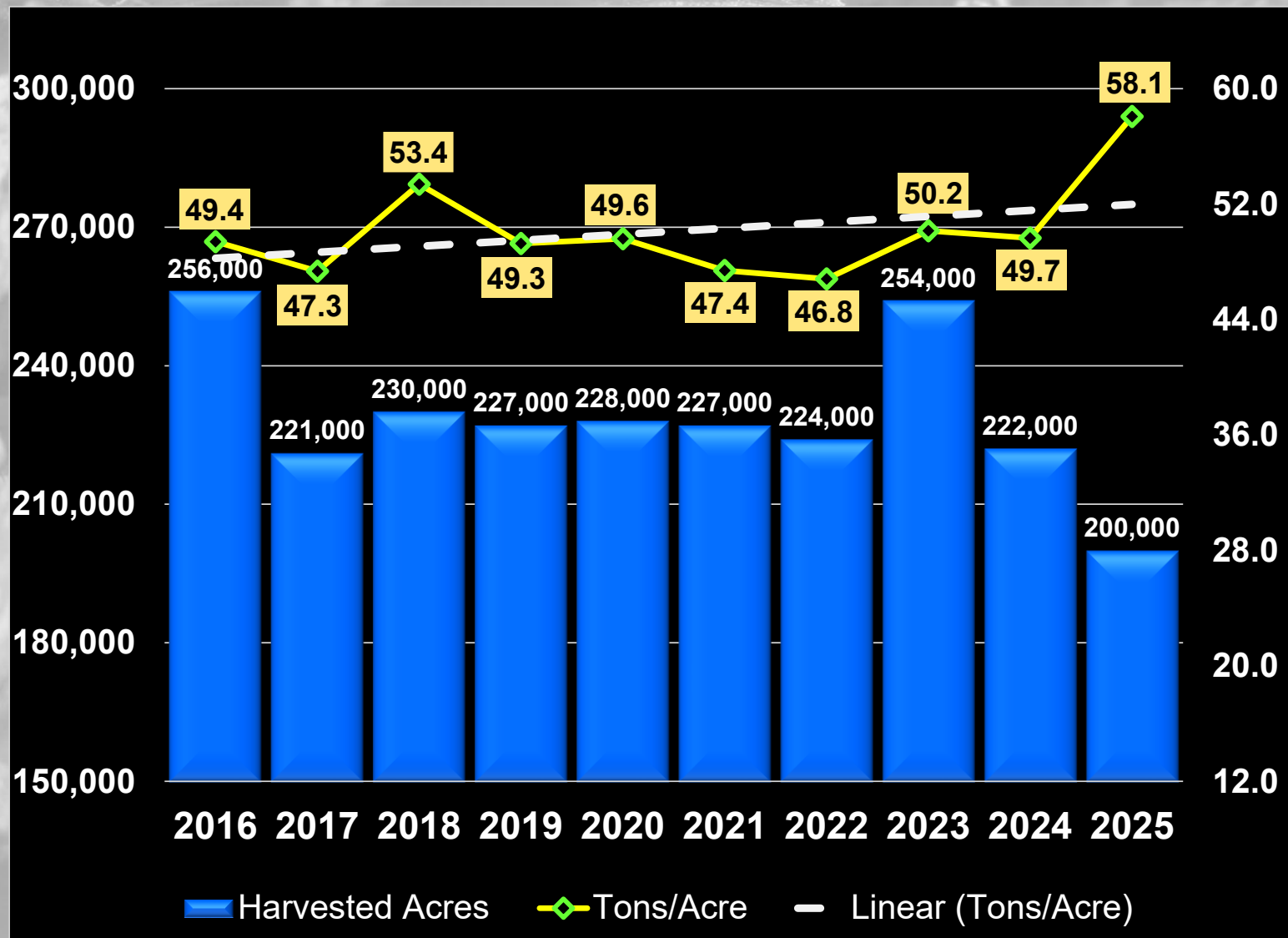
California Market

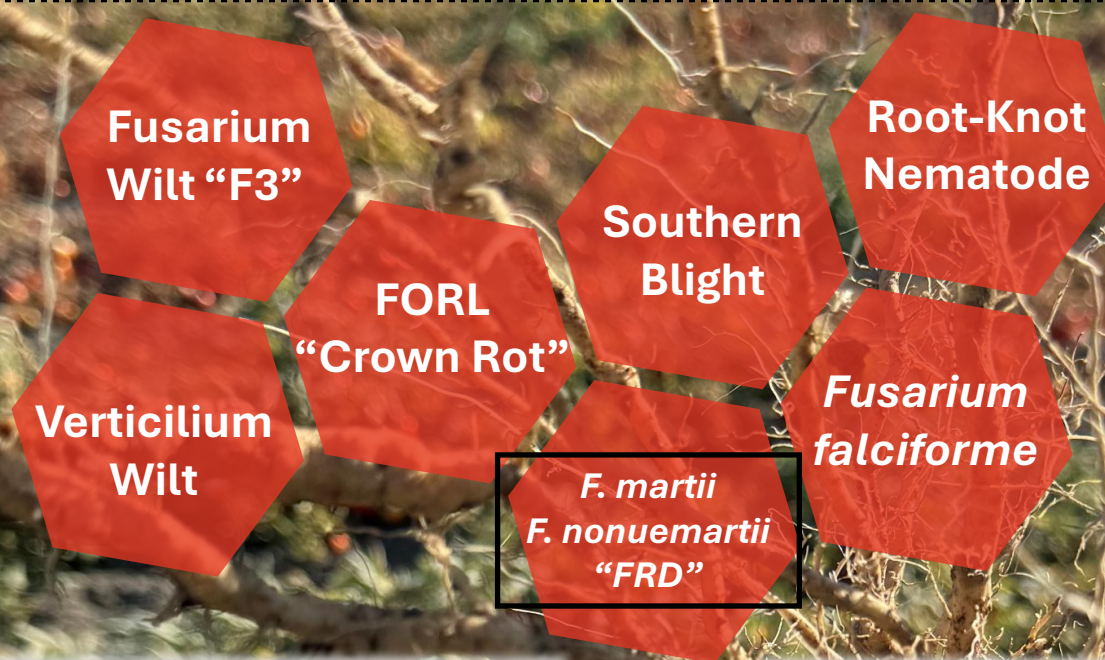


California Tomato Harvest

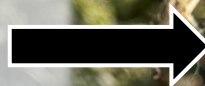
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Harvested Acres & Yield: 10 Years





FRD
Among the main vine
decline contributors



Pathogenic Scale

Fusarium noneumartii

Fusarium martii

Fusarium falciforme



Top Yielding Varieties in Soil-Born Pathogen Bio Assay Trials

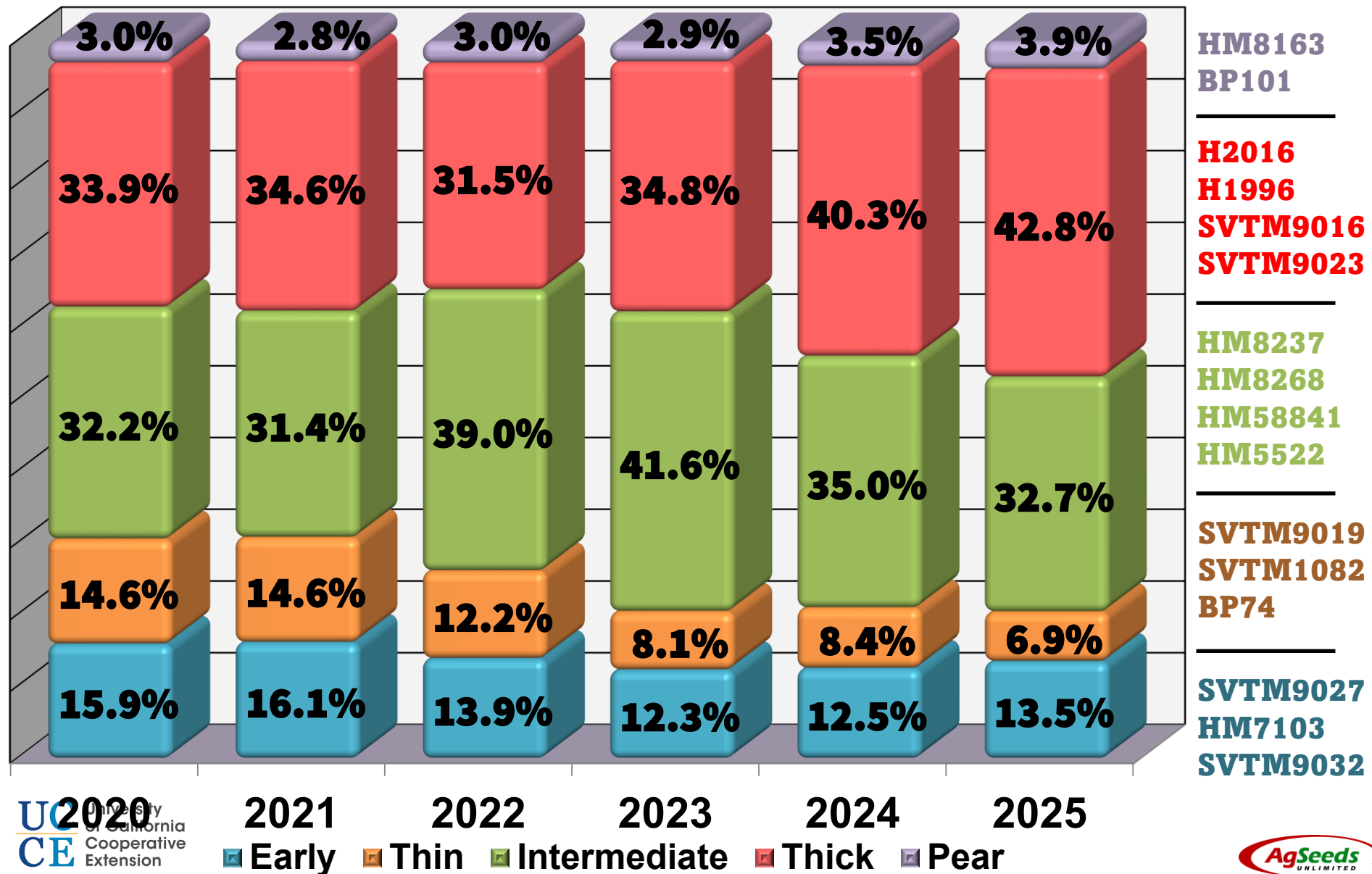
- SVTM9041
- BP109
- SVTM9016
- H2516
- SVTM9037
- HM8237
- HM58841
- BP110

California Tomato Harvest

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Class Market Share: Class

Final PTAB Report



Top 15 Statewide Varieties: Yield Standard

Final PTAB Report

Rank	Variety	Graduation Yield Stats			Age
		Year	▲ Yield	Standard	
1	HM8237	2021	12.3%	54.2	4
2	H2016	2021	7.9%	56.7	4
3	H1996	2020	2.9%	59.2	5
4	SVTM9016	2019	8.0%	57.7	6
5	HM8268	2021	-0.9%	58.9	4
6	HM58841	2016	9.7%	53.8	9
7	SVTM9023	2020	13.1%	50.3	5
8	SVTM9027	2021	2.0%	49.6	4
9	HM5522	2018	8.9%	50.7	7
10	SVTM9037	2022	13.1%	54.4	3
11	SVTM9019	2020	14.6%	53.7	5
12	HM7103	2020	15.4%	65.4	5
13	SVTM9032	2021	3.3%	66.5	4
14	SVTM9041	2023	2.8%	72.3	2
15	HM8163	2017	7.9%	49.1	8

Standards

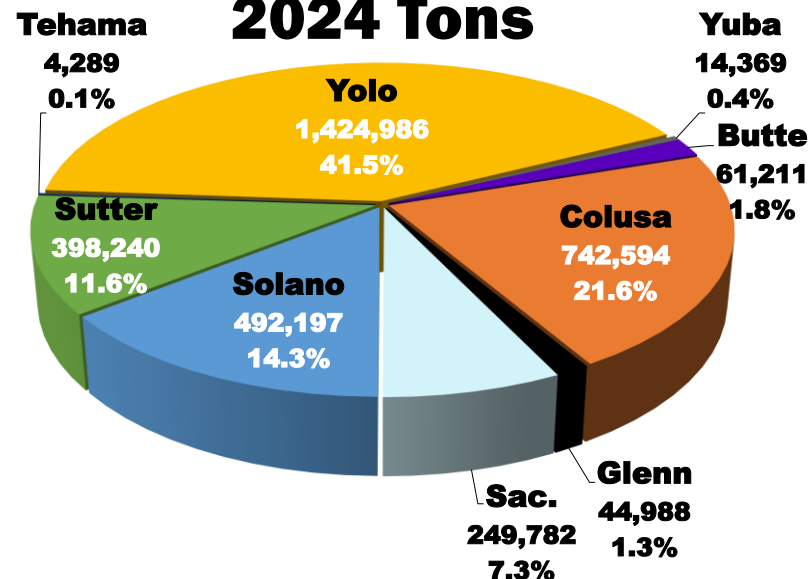
Early	BQ273
Thin	DRI319
Thick	H8504
Thick	SVTM9016
Pear	H1293
Yield	N6428

Region Review

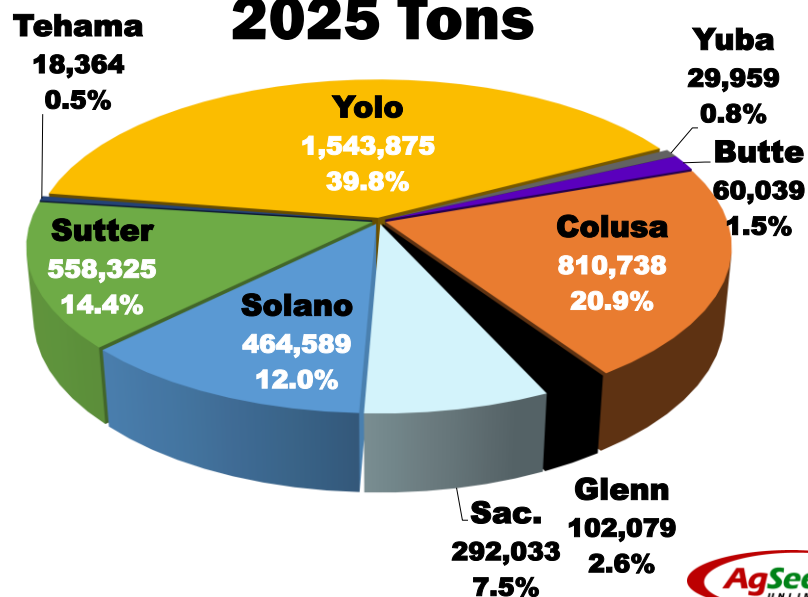


North

2024 Tons

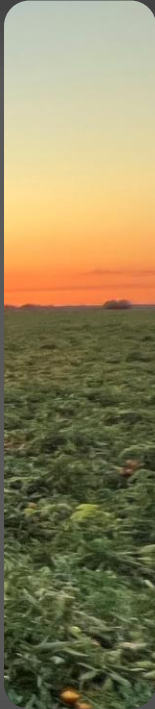
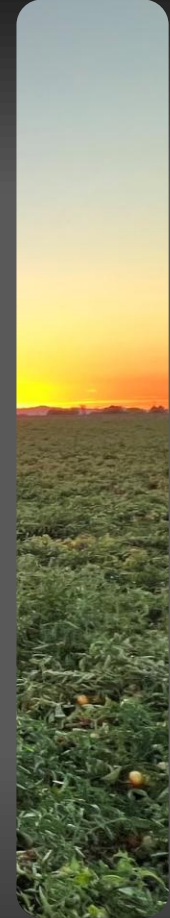
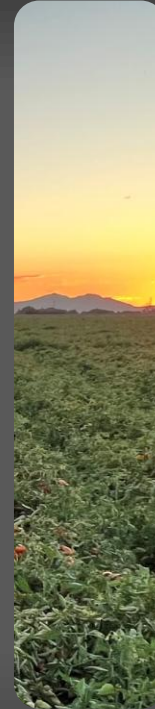
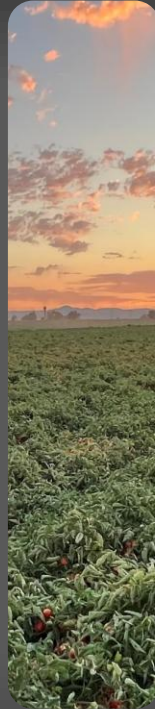


2025 Tons



Variety	Loads		Brix	Mold	LU
	2025	2024			
H2016	25,033	11,411	4.75	1.9	2.0
HM8237	23,909	18,906	5.03	1.2	0.6
HM58841	14,744	16,875	5.36	1.0	0.7
H1996	12,058	10,222	4.93	1.3	1.7
SVTM9016	11,018	21,848	5.06	1.6	0.7
HM8268	10,777	9,403	5.32	0.9	1.2
SVTM9032	7,675	5,858	5.23	0.3	1.2
SVTM9019	4,257	3,707	5.14	1.3	2.6
H2015	4,247	1,568	4.46	2.5	1.3
N6428	3,974	7,670	4.82	1.9	2.7
Total	149,784	141,070	5.04	1.4	1.3

Variety Review



Early Class

Variety	Supplier	Attributes	Loads		Brix	Mold	LU	Color
			2025	2024				
SVTM9027	SVS	F3, Lv	17,165	16,566	5.51	0.6	0.6	19.99
HM7103	HM	EFH	11,168	14,511	5.25	0.3	1.1	20.09
SVTM9032	SVS	F3, Fr, Lv	10,937	7,998	5.29	0.3	1.1	20.63
SVTM9034	SVS	F3	4,583	3,964	5.56	0.8	0.6	20.11
HM0371	HM	F3, Fr	3,781	288	5.48	0.5	0.9	19.58
N6416	NS	-	3,499	3,085	4.89	0.2	1.4	21.01
BQ400	SYN	-	2,536	2,569	5.30	0.3	0.8	19.70
SVTM9033	SVS	F3	1,332	590	4.73	0.6	1.0	21.56
CXD187	HM	-	935	1,224	4.70	0.5	1.7	20.86
E247	ES	F3	819	1,190	5.14	0.4	1.1	20.30
H1015	HZ	EFS™	788	1,304	5.05	1.0	1.7	20.28
BQ403	SYN	-	662	817	5.16	0.6	1.6	20.62
Total			60,072	55,144	5.32	0.5	0.9	20.25

*Must have at least 500 Loads

Market Share

13.5%

Definition

117 Days or Less

Movement

Loads Increased

8.9%

BP116

Semi-Commercial

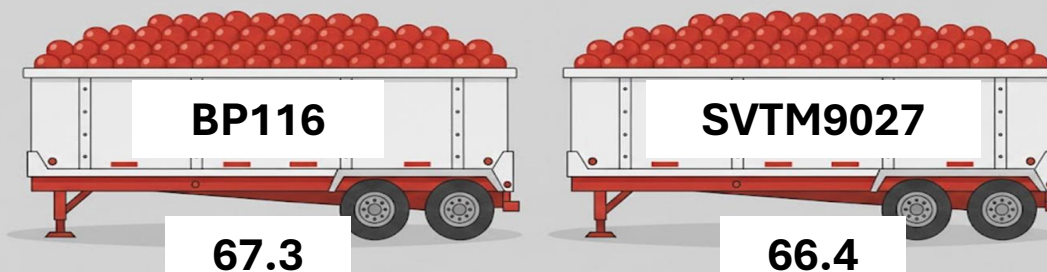


- **Fruit Size**
- **Strong Vine**

2025 Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
BP116	81	5.27	3.52	329	2.17
SVTM9027	89	5.43	4.77	371	2.22
N6416	74	4.90	4.52	309	2.23



Tons per acre, 6 locations

BP116: 0.9 Tons yield advantage

Days:

117

Dis/Res:

VFFFNptsw

Thin Class

Market Share

6.9%

Definition

PPB $\geq$ 4.10

Movement

Loads Decreased

16.9%

Variety	Supplier	Attributes	Loads		Brix	Mold	LU	Color
			2025	2024				
SVTM9019	SVS	F3, EFH	11,482	11,673	5.34	1.6	2.4	22.24
SVTM1082	SVS	F3	7,333	8,229	5.40	1.9	1.9	21.15
BP74	BHN	F3, EFH	2,853	3,389	5.48	1.7	1.4	19.94
N6474	NS	F3, EFH	2,526	4,726	5.06	1.7	1.6	21.20
N6402	NS	-	2,338	2,561	5.71	0.8	1.8	20.05
HM5511	HM	F3, Fr	1,146	1,810	5.70	0.4	1.3	19.86
BP43	BHN	F3	1,033	1,272	4.97	2.5	0.8	20.30
SVTM9040	SVS	F3	757	513	5.92	0.7	1.5	20.63
Total			30,692	36,954	5.39	1.6	1.9	21.24

*Must have at least 500 Loads

BP109

Semi-Commercial

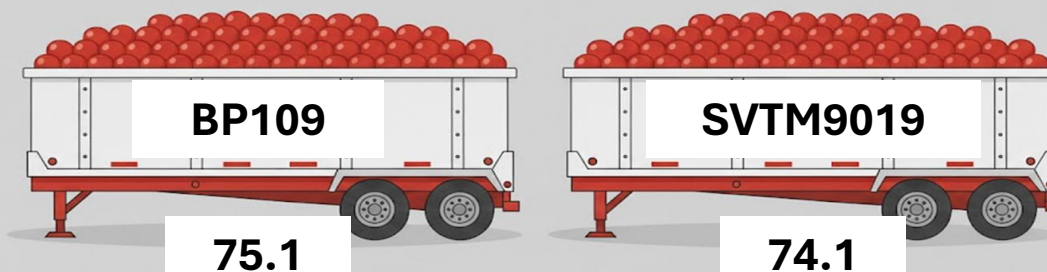


- **High Brix**
- **Strong Yield**
- **True Thin**

2025 Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
BP109	76	5.66	4.97	289	2.20
SVTM9019	86	5.46	4.70	282	2.05
SVTM1082	74	5.56	4.79	391	2.14



Tons per acre, 16 locations

BP109: 1.0 ton yield advantage

Days:

122

Dis/Res:

VFFFNptsw

BP110

Semi-Commercial

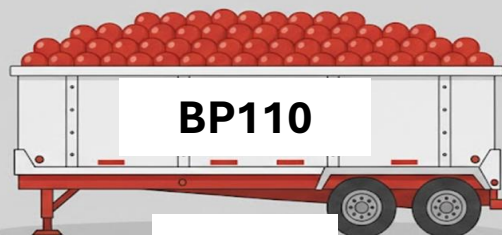


- **High Brix**
- **Strong Yield**
- **Thin Chemistry**

2025 Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
BP110	73	5.53	5.00	286	2.21
SVTM9019	86	5.46	4.70	282	2.05
SVTM1082	74	5.56	4.79	391	2.14



BP110

72.8



SVTM9019

74.1

Tons per acre, 15 locations

BP110: 1.3 Tons lower yield

Days:

123

Dis/Res:

VFFFNptsw*

HM0221

Semi-Commercial

HM • CLAUSE

- Use on Front End
- Surprise Variety
- Thin

2025  Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
HM0221	87	5.46	4.72	223	2.15
SVTM9019	86	5.46	4.70	282	2.05
SVTM1082	74	5.56	4.79	391	2.14



75.9



78.0

Tons per acre, 18 locations

HM0221: 2.1 Tons less yield

Days:

122

Dis/Res:

VFFFNtswFr

H2476

Semi-Commercial

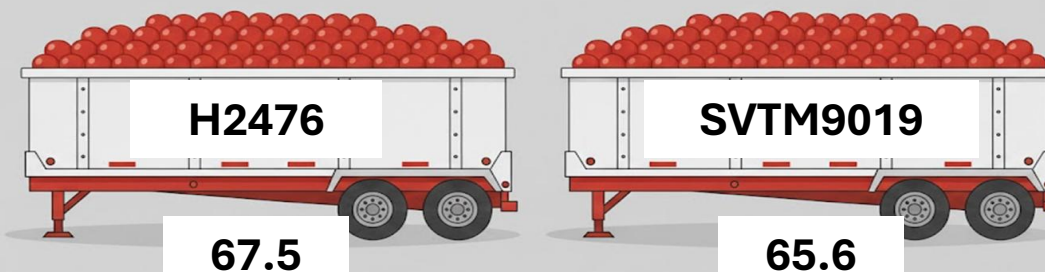


- **High Brix**
- **Strong Vine**

2025 Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
H2476	83	5.47	3.90	261	2.18
SVTM9019	86	5.46	4.70	282	2.05
SVTM1082	74	5.56	4.79	391	2.14



Tons per acre, 10 locations

H2476: 1.9 Tons yield advantage

Days:

123

Dis/Res:

VFFFNtswFr

Intermediate Class

Variety	Supplier	Attributes	Loads		Brix	Mold	LU	Color
			2025	2024				
HM8237	HM	F3, Fr, EFH	47,532	40,476	5.14	1.2	0.7	21.11
HM8268	HM	F3	22,733	17,423	5.36	1.1	1.2	19.36
HM58841	HM	EFH	21,348	26,440	5.36	1.2	0.7	20.49
HM5522	HM	Fr	15,790	21,738	5.63	0.9	0.6	19.51
N6428	NS	F3, EFH	8,240	15,342	4.93	1.8	2.3	21.21
N6434	NS	F3, EFH	7,808	1,750	4.88	2.5	2.3	21.74
SVTM9036	SVS	F3, EFH, Lv	5,174	4,412	5.24	1.1	2.1	21.03
SVTM9021	SVS	F3, Fr	3,806	3,562	5.22	1.3	0.8	19.92
SVTM9013	SVS	F3	2,736	6,161	5.06	3.0	1.6	20.14
HM4521	HM	EFH	2,113	9,271	5.40	0.8	0.6	20.37
BOS811	OS	EFH	2,089	2,817	4.82	1.6	1.1	20.16
LS0645	LS	F3	1,828	68	5.16	1.1	1.7	20.10
HM5235	HM	F3	1,316	3,071	5.38	0.6	1.7	19.56
N6473	NS	F3, EFH	768	-	5.00	6.3	1.4	19.37
Total			145,078	156,363	5.24	1.3	1.0	20.49

Must have at least 500 Loads

Market Share

32.7%

Definition

2.51 ≤ PPB ≤ 4.09

Movement

Loads Decreased

7.2%

Intermediate Class Results

Variety	Statistical Ranking			% Good
HM8237	A			89.02%
N6498		B		39.35%
HM8268			C	17.71%
LS0645		17.36%		
H2515		11.63%		
HM5522		3.62%		
BP123		1.94%		
SVTM9036			1.10%	
LSD @.05 22.9%				

Thick Class

Variety	Supplier	Attributes	Loads		Brix	Mold	LU	Color
			2025	2024				
H2016	HZ	F3	47,119	23,493	4.75	1.7	1.4	20.12
H1996	HZ	F3, EFS™	35,255	30,754	4.93	1.3	1.0	20.34
SVTM9016	SVS	F3, EFH	27,743	44,416	5.14	2.1	0.6	21.09
SVTM9023	SVS	F3, EFH	19,574	8,686	5.22	1.9	1.5	21.23
SVTM9037	SVS	F3, EFH, Lv	14,501	5,954	5.09	1.7	0.9	21.35
SVTM9041	SVS	F3, EFH	8,481	1,846	5.10	1.6	1.0	21.17
H1776	HZ	-	5,275	9,608	5.05	0.6	0.4	20.18
H1662	HZ	F3, Lv	5,262	8,331	4.98	2.4	1.7	21.50
H2015	HZ	F3	5,062	2,272	4.49	2.3	1.2	19.48
H4707	HZ	EFS™	5,044	3,955	4.77	1.4	0.7	21.85
H5608	HZ	-	4,413	5,845	4.94	1.3	1.0	19.73
UG16112	UG	EFH	2,546	4,941	4.80	1.3	0.9	20.96
BOS6848	OS	F3	1,682	-	5.01	1.6	0.8	19.24
H1657	HZ	-	1,328	781	4.70	0.7	0.4	19.04
N6475	NS	F3, EFH	1,283	6,077	4.86	4.5	0.7	20.63
H2365	HZ	F3, Fr, EFS™	1,199	126	4.88	1.6	0.7	20.75
Total			190,149	169,080	4.95	1.7	1.1	20.63

Must have at least 1,000 Loads

Market Share

42.8%

Definition

PPB ≤ 2.50

Movement

Loads Increased

12.5%

LS1715

Semi-Commercial

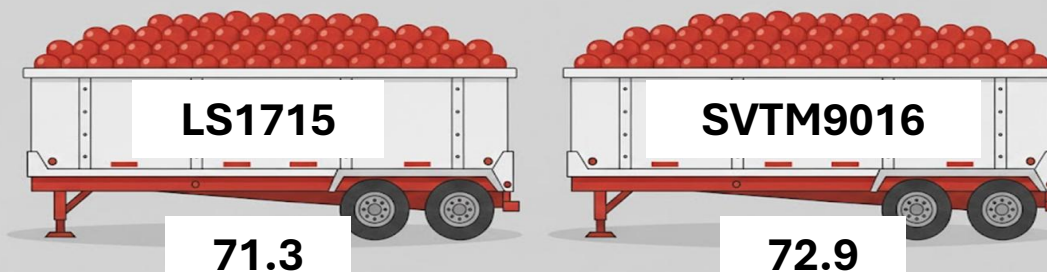


- **Ketchup Viscosity**
- **Strong Vine**

2025  Lab

33 Locations

Variety	FW	Brix	PPB	Ost	Color
LS1715	78	4.75	1.80	379	2.19
SVTM9016	88	5.08	1.98	406	2.07
H1996	76	4.83	1.67	473	2.22



Tons per acre, 13 locations

LS1715: 1.6 Tons lower yield

Days:

125

Dis/Res:

VFFFNtsw

Pear Class

Market Share

3.9%

Definition

PPB $\geq$ 4.10

Movement

Loads Increased

20.4%

Variety	Supplier	Attributes	Loads		Brix	Mold	LU	Color
			2025	2024				
HM8163	HM	-	8,341	7,564	5.67	2.1	1.4	19.28
BP101	BHN	F3	4,133	2,734	4.70	1.7	1.4	20.10
N6485	NS	F3	3,279	1,783	4.56	2.0	0.8	19.69
HM5369	HM	-	809	525	5.47	1.0	0.5	19.66
HM8507	HM	F3, Fr	333	442	5.29	2.2	1.6	18.48
N6502	NS	F3	170	-	4.69	1.1	1.5	19.69
H2128	HZ	F3	157	545	4.87	2.1	2.6	19.14
BP88	BHN	F3	70	768	5.13	2.9	5.0	21.76
Pear Total			17,292	14,361	5.19	1.9	1.3	19.57