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Report Highlights:

Turkiye's pistachio production in marketing year (MY) 2025/26 is forecast to decrease substantially due to multiple factors. This MY's "off-year" crop will be less than half of last MY's record high production. Carry-over stocks will somewhat compensate for the low production, but pistachio prices are expected to increase as will imports. While Turkiye's production of tree nuts continues to grow, the country is expected to import substantial volumes of almonds and walnuts in MY 2025/26 to meet steady consumer demand. Imports of U.S. tree nuts are now at equal footing with other foreign competitors following Turkiye's removal of its 10 percent retaliatory tariff that was imposed because of U.S. Section 232 duties on Turkish steel and aluminum. The United States will remain one of the top suppliers of walnuts, almonds, and pistachios to Turkiye.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

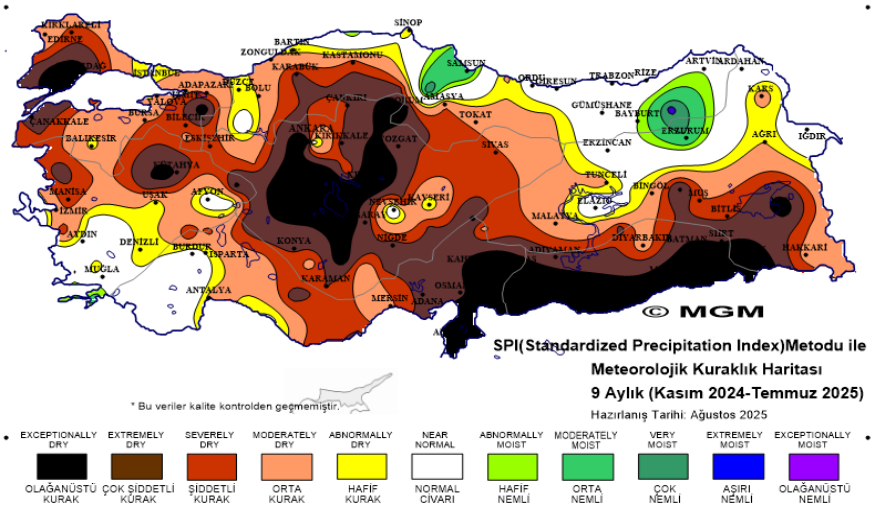
I. PISTACHIOS

a. PRODUCTION

Post forecasts Turkiye's pistachio production in marketing year (MY) 2025/26 to decrease by almost 69 percent to 120,000 metric tons (MT). There are multiple factors contributing to this projected decrease, the most significant of which is that this year is considered an "off year" in the production cycle for pistachios. However, the MY 2025/26 harvest has been lower than a regular "off-year," since the trees are "tired" from last MY's record high crop.

Although there was an unexpected frost in February, March, and April 2025, Gaziantep and Sanliurfa provinces, where most Turkish pistachios grow, were not significantly affected. The damage to pistachio trees predicted in the spring turned out to be less substantial, but low night temperatures have contributed to the decreased crop; see Post's report about the frost event. Had the frost and drought not impacted the trees, it is likely that production would have been similar or slightly above the last off-year in 2023.

Map 1: Standard Precipitation Index (SPI) Method Draught Map for Nine Months (Nov. 2024 - July 2025)



Source: General Directorate of Meteorology of Turkiye.

Another weather-related factor impacting this year's production was less-than-ideal precipitation during winter 2024 and spring 2025, especially in the southeastern part of Turkiye where most of the pistachio production takes place (see Map 1). Timely and adequate precipitation is critical, since most pistachio production across Turkiye is rain-fed.

According to the Turkish Statistical Institute (TurkStat), there were an estimated 62.4 million bearing pistachio trees at the beginning of the current marketing year, up nearly 3 percent from last year. Market sources confirmed that although there new plantings increased, many of the new bearing trees are now approaching 10 years in age, which is when yields start reaching their optimal range. This age-related yield factor should contribute to higher production volumes in the years ahead.

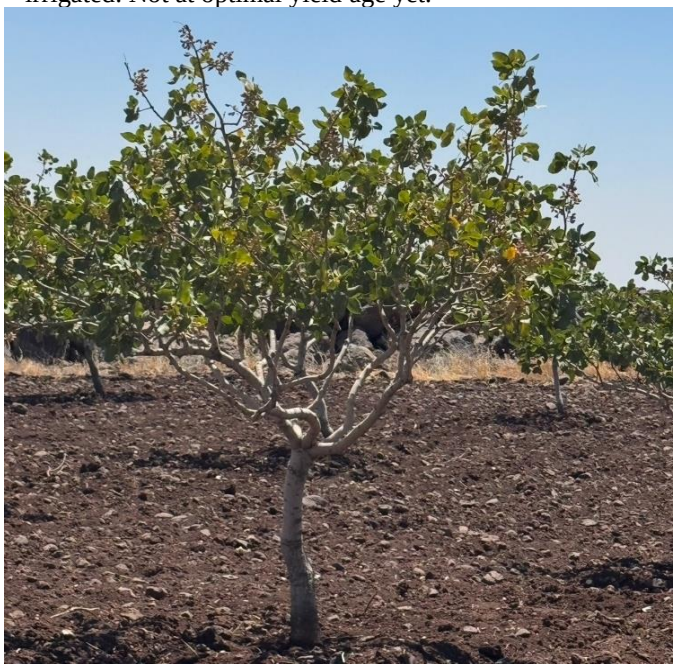
At the same time, there are about 37.8 million non-bearing trees, which is 42 percent higher than a year ago. Turkiye's production of high-quality pistachios is predicted to increase in the future with the increasing number of young bearing trees. Since pistachio producers and traders were able to make adequate profits in the last 5-10 years, investments in the southeastern Gaziantep, Saliurfa, Siirt, and Diyarbakir provinces continue. Market sources indicate that TurkStat's tree counts might not be fully accurate, however they reconfirm the expansionary trend in the country's production of pistachios.

Over the last 10-15 years, pistachio growers have invested in developing and expanding their orchards, replacing old trees (some of which are 50-years old), and introducing modern growing techniques. These more sophisticated orchards with their newer trees, which are less affected by the periodicity in

production, are expected to achieve higher yields in the future. For the new trees being planted, market sources confirmed that growers are planting more of the Siirt variety compared to earlier years, known to be less periodical than the Antep variety. However, the Antep variety still accounts for most of the pistachio trees being grown.

Pistachio yields and production levels can vary dramatically from year to year, with average yields during an on-year ranging from 8.8-13.2 pounds (lb.) per tree and 4.4-6.6 lb. per tree during off-years. However, periodicity effects on yields have decreased in recent years with the planting of new trees, on-farm investments, and the introduction of good agricultural practices. At the same time, with the help of outside training, farmers have learned how to reach higher yields by taking better care of the soil and trees. As a result, average yields are expected to continue to slowly increase in the coming years.

Photo 1: A young pistachio tree, in a new orchard, early August 2025, in Sanliurfa province of Turkiye. Not irrigated. Not at optimal yield age yet.



One of the more notable and ongoing training programs, called *"May you have abundant pistachios,"* was launched in 2011 by the Turkish Foundation for Combating Soil Erosion, Forestation, and Protection of Natural Habitats (TEMA), with contributions from private companies. The initiative trains farmers in Gaziantep and Sanliurfa (the two biggest pistachio-producing provinces in the country) to properly care for their trees through improved pruning and trimming techniques, and in better practices for applying fertilizer and pesticides. Farmers applying this training report seeing their yields double or even triple at times, while also reducing periodicity effects in off years.[1] In parallel to this training program, local universities in the major pistachio growing regions have developed better production methods and plant protection measures to help farmers improve yields.

Gaziantep and Sanliurfa account for 80 percent of the country's total production of pistachios. The southeastern provinces of Adiyaman, Siirt, Kilis, Kahramanmaras, Mardin, and Diyarbakir account for another 15 percent of total production. The remaining five percent is thinly spread across the Aegean, Mediterranean, and Marmara regions.

There are two main types of pistachios grown in Turkiye, Gaziantep (Antep) and Siirt. Both are unique to Turkiye and differ in size and shape compared to pistachio varieties grown in Iran and the United States. The Antep variety accounts for 85 percent of pistachios grown in Turkiye; the Siirt variety makes up the remaining 15 percent and is considered higher-yielding.

The quality standards for Turkish pistachios are directly related to the size of the nut. Ninety nuts or fewer per 100 grams is considered first quality; 90-100 nuts are second quality; 100-120 nuts are third quality; and more than 120 nuts are fourth quality.

[1] News article in Turkish: https://www.ekonomim.com/kose-yazisi/bilimsel-temelli-tarimla-antep-fistiginda-yok-yili-bitti-verim-ikiye-katlandi/707910

CONSUMPTION

MY 2025/26 consumption is forecast lower year-on-year at 165,000 MT based on the projected decrease in domestic pistachio production.

Although down compared a year ago, Turkiye continues to grapple with high inflation, including rising food prices. In August, the annual consumer price index (CPI) inflation and annual food inflation were both 33 percent. See Post's latest Exporter Guide and Retail Foods Report for more information about the current economic conditions in Turkiye.

In the case of pistachios, retail prices during the month of August were nearly 33 percent higher in terms of Turkish Lira (TL) than the same time last year. By comparison, though, the price in U.S. dollars (USD) increased by a smaller amount (13 percent). See table 1.

Table 1: Indicative retail price of pistachios

Retail Prices of Pistachios			
Years	TL/kg*	TL/USD**	USD/kg
2018	60	6.687	8.97
2019	90	5.728	15.71
2020	105	7.353	14.28
2021	107	8.362	12.80
2022	197	18.176	10.84
2023	463	26.622	17.39
2024	597	34.000	17.56
2025	796	40.000	19.90

* Minimum price at an organized retailer

** As of last week of August

It appears pistachio prices increased commensurate with annual inflation rates, which indicates stability in pistachio prices. Hence, stability in consumption of pistachios might be expected. The consumption of pistachios will be proportionally comparable to "off year" MYs.

Photo 2: Pistachio ice cream, local type, with pistachio pieces

Historically, most of the country's pistachio crop is consumed domestically, though a small percent of production is exported. Market sources indicate that most of Turkiye's consumption levels vary year-to-year depending on the availability of domestic supplies. About 35 percent of pistachios are consumed as snacks and the remaining 65 percent are used in making confectionary products, especially traditional desserts like baklava. In addition, during the last decade, more pistachios are being used in other desserts, such as chocolate and ice cream.

In the last few years, consumers in larger cities increasingly prefer to buy packaged pistachios and other nuts from retail supermarkets instead of buying them from a traditional bulk nut store. This trend is expected to continue as consumers demand greater convenience and as more supermarkets spread across the country. For more information about the latest retail sector trends, please refer to Post's latest Retail Food Report.

Approximately half of the pistachios that are consumed for snacking are packaged. This percentage is expected to increase in the future as consumers demand greater convenience and shop at discount retail outlets where packaged food products are the norm. With this shift towards increased consumption of packaged pistachios, per capita consumption (about 4.4 lb./year) and overall consumption is expected to grow.

b. TRADE

Exports

MY 2025/26 exports are forecast at a record 45,000 MT, assuming steady demand for re-exported pistachios. The bulk of Turkiye's exports have historically consisted of U.S. and Iranian pistachios, which are sorted and packed in Turkish free trade zones and re-exported to third markets. Looking ahead, given the yearly fluctuations in domestic pistachio production, Post expects that the re-export business will continue to dominate overall exports for the foreseeable future.

Turkiye predominantly exports shelled pistachios. The leading export destinations are Italy, Iraq, Syria, Germany, Algeria, and Saudi Arabia.

Imports

MY 2025/26 imports are forecast at 55,000 MT, which is up about 5 percent from the previous year's newly revised figure. Turkiye mainly imports pistachios to process (size, roast, pack, etc.) and re-export; the rest stay in warehouses to be exported in the future.

MY 2024/25 pistachio import volumes are revised higher to 52,500 MT in line with the latest trade data. The United States and Iran were the largest sources of imported pistachios, with U.S. pistachios accounting for 52 percent of total imports.

According to market sources and Post observations, imported pistachios have typically not been sold on the domestic market because of high import taxes, and are instead brought into free trade zones for processing and re-export. The absence of a bilateral phytosanitary protocol has also discouraged imported pistachios from entering the market for domestic consumption.

The Most Favored Nation (MFN) duty on imported pistachios is 43.2 percent.[2] The 10 percent retaliatory tariff against U.S. pistachios that existed since 2018,[3] was abolished on September 22, 2025 (See Post's report for details). This gives equal opportunity to U.S.-originated pistachios. Still, it remains to be seen whether this year's decreased production will provide an opportunity for increasing U.S. exports.

c. STOCKS

Although the production of pistachios for MY 2025/26 is relatively low, with the record harvest in MY 2024/25, year-end stocks for MY 2025/26 are still predicted to be 165,000 MT. This assumes that traders will only sell off a portion of their inventories. Many traders see the pistachios that they stock as an investment against inflation.

Pistachio stocks vary considerably from year to year, in line with the cyclical nature of production. This cyclicality and the fact that neither the government of Turkiye (GoT) nor producer associations maintain ending-stock numbers leads to speculation, price fluctuations, and artificially inflated prices. According to industry insiders, pistachio traders intentionally hold onto inventories longer than normal to drive

[2] This MFN rate is not applicable for pistachios that are imported to Free Trade Zones (FTZ) to be processed and re-exported. This operation is exempted from customs tariff as it does not enter Turkiye but stay in FTZs.

[3] The retaliatory tariffs existed since 2018 because of U.S. Section 232 duties imposed on Turkish steel and aluminum put in place in 2018. Retaliatory tariffs were first set as 20 percent for tree nuts but in 2019 they were halved to 10 percent. See news on removal of the retaliatory tariffs by Turkiye: https://www.reuters.com/world/middle-east/turkey-says-it-is-ending-additional-tariffs-some-us-imports-2025-09-22/

domestic prices higher. Accurate end-stocks data would help stabilize price fluctuations and consumption levels, especially in off-years.

Municipal governments in Gaziantep and Sanliurfa have taken steps to increase the transparency of pistachio stock levels in hopes of reducing speculation in the market. In June 2021 the Gaziantep Commodity Exchange (GCE) built Turkiye's first licensed pistachio warehouse, with a capacity of 10,000 MT. The warehouse has an electronic trading platform as well as a laboratory for quality testing. Sanliurfa Commodity Exchange has also invested in a licensed pistachio warehouse project with 10,000 MT of storage capacity.[4] As these licensed warehouses represent just a small fraction of overall production, more of these facilities are needed to increase market transparency on the status of domestic stock levels. The government operates licensed warehouses for other crops, such as wheat, sunflower seed, and cotton to create price stability.

Photo 3: Pistachios on display of a local nut store in Istanbul to be sold as half a kg. packs in early September 2025.

Scientists from various local universities continue supporting research applications to improve storage conditions, which is important in maintaining the quality of pistachios and in helping minimize food safety concerns, such as aflatoxin.

d. POLICY

Pistachio Imports for Consumption Considered One Potential Solution to Artificially High Prices

As of mid-September, the Turkish Ministry of Agriculture and Forestry (MinAF) began allowing imports of pistachios (HS Code: 0802.51 and 0802.52) from the United States, Iran, and Syria without a Pest Risk Analysis (PRA), which was the barrier for U.S. (and other originated) pistachios. For at least the last several years, nut traders/processors in Turkiye and retail chains advocated for the GoT to allow imports of pistachios to help reduce prices. From Post's perspective, imports for consumption could have a stabilizing effect, considering that in-shell U.S. pistachios cost about $13-14/kg in retail in the United States, whereas the retail price in Turkiye for domestic pistachios currently starts from $19-20/kg. This year's frost and drought in Turkiye were important reasons for the government to allow imports of pistachios, which might change in coming MYs. According to market sources, the 43.2 percent import tariff still seems to be a commercial challenge.

[4] News in Turkish: https://www.ekonomim.com/sehirler/fistik-ureticileri-planlama-ve-dengeli-piyasa-kosullari-istiyor-haberi-764928

Photo 4: Pistachio filled local desert

At the same time, market sources report that nut traders have petitioned the government to allow pistachios to be imported duty-free for processing and re-export under the Inward Processing Regime (IPR). The IPR allows companies to bring in certain goods tax-free for processing inside the country and re-export. At present, pistachio imports can only enter duty free inside a tax-free zone. The IPR customs arrangement offers companies greater flexibility to process and re-export from anywhere in the country.

System for Agricultural Support Payments has Changed

While the central government does not provide specific, direct support payments to pistachio or other tree nut growers, there are generic subsidies that are available to all registered farmers.

On August 29, 2024, the GoT announced in a Presidential Decision Decree (PDD) that it was instituting a new support system for 2025-2027. The payment under the new system is based on a calculation in which a standard coefficient amount per decare (da) for all crops is multiplied by a multiplier factor depending on the crop. For 2025, the coefficient has been set at 244 TL/da and the multiplier for tree nuts (included in "other products") is fixed at the lowest level, 1. (Note: Other crops, which are considered more strategic, like cotton, have a higher multiplier factor.) Thus, tree nut farmers will receive 244 TL/da as a support payment. The coefficient may be updated each year, depending on overall market conditions and the economic situation.

With the new system, the support coefficient for "organic production," lowest level (first level), where pistachios belong under "other products" is 1.2 for individual organic certificates (1.2 x 244 TL/da = 292.80 TL/da) and 0.6 for group organic certificates (0.6 x 244 TL/da = 146.40 TL/da). The support coefficient for "good agricultural practices" is 0.7 for individual certificates (0.7 x 244 TL = 170.80 TL/da) and 0.35 (0.35 x 244 TL/da = 85.40 TL/da) for group certificates. These two payments will be provided in addition to the basic support of 244 TL/da (as explained in previous paragraph) if the conditions for organic or good agricultural practices are met.

Grower Groups Advocate for Government to Set Purchase Prices for Pistachios

Some agriculture-related non-governmental organizations (NGOs) in the Sanliurfa and Gaziantep provinces are demanding that the GoT, through the Turkish Grain Board (TMO), establish official purchase prices for pistachios like it does for hazelnuts. These groups argue that pistachios are just as strategic as hazelnuts to the wellbeing of the Turkish economy. They are also advocating for a specific, direct government subsidy for pistachio producers. The GoT has so far not established a direct purchase system for pistachios.

Training Growers and Processors to Comply with EU Standards

The Gaziantep Commodity Exchange (GCE), in cooperation with the German Institute of International Cooperation (GIZ), is conducting trainings for people who work or would like to work in the pistachio industry. These trainings include topics such as processing and roasting, marketing, foreign trade, and

sustainability. Additionally, there are trainings, for GCE member companies on topics covering the EU Green Transformation Agreement, EU Carbon Decreasing Mechanisms, EU Field to Fork Strategy, and EU Supply Chain Regulations. For farmers, there will be trainings about smart agriculture applications, reducing the use of pesticides and fertilizers, and pest management.[5]

Photo 5: Pistachio tree in Gaziantep province of Turkiye in May 2024 when there was a record high yield, well groomed. Not irrigated.

[5] News in Turkish https://www.gazianteppusula.com/haber/16232569/gtbden-antep-fistigi-egitimi

II. ALMONDS

a. PRODUCTION

Almond production for MY 2025/26 is forecast to slightly decrease 7.5 percent year-over-year to 25,000 MT. This projected decrease is attributed to spring frost damage. The 2025 frost event has been less harmful to almond production than predicted in the spring, but nevertheless did slightly decrease the total amount produced.

Amid rising input costs, almond growers continue to complain that it is difficult to make a profit because the benchmark purchase price for almonds is too low, and government support payments are considered inadequate. To protect farmers' profits, Kahta Hard Shelled Fruit Producers Union is pressing the national government to increase the tariff on imported almonds from the current level of 15 percent to the maximum bound rate of 43.50 percent.

As of September 15, 2025, there was no declared official price by the Agricultural Credit Cooperative Union (ACCU) for almonds. Like in years past, the Chambers of Agriculture and producer unions in Adiyaman and Kahta continue to press the ACCU to raise the almond purchase price and announce it earlier in the season. Private traders use the ACCU purchase price as a benchmark in setting contract prices. In August 2025 the president of the Kahta Chamber of Agriculture declared that purchase prices should be a minimum of 400 TL/kg ($10/kg) for MY 2025/26. It was 240-280 TL/kg ($7.06-8.24/kg) last season. [6] [7]

Photo 6: Caramel ice cream, local type, with almond pieces

During the early 2000s, to encourage almond production, the Turkish government provided various financial incentives, such as allocating free land for 49 years, interest free loans, and a production subsidy. While these financial incentives have since come to an end, they did encourage investments in new almond orchards throughout the country between 2005-2015. Unless farmers uproot trees, these earlier investments will continue contributing to higher almond production in Turkiye for the next 5-8 years. Of note, the trees planted in 2015 are just approaching their optimal bearing age of 10-years old.

The district of Kahta, within the Adiyaman province, is the leading area for almond production in Turkiye, according to the Kahta Hard Shelled Fruits Producers' Union. Several years ago, the Union announced a goal of increasing almond orchard acreage in Kahta to 100,000 ha by 2023/24 to produce enough almonds to meet domestic demand. The district reportedly reached its acreage goal a year ahead of schedule, though many of the newly established orchards still have large numbers of non-bearing trees. As for the Union's production target, it seems unreachable for the time being.

[6] Foreign exchange rate by end of August 2025 was approx. 40 TL/USD and was approx. 34 TL/USD by the end of August 2024.

[7] News in Turkish https://www.kahtagercek.com/?kahta/2025-badem-hasat-sezonu-oncesi-kahta-ziraat-odasiaposndan-fiyat-aciklamasi-12159h.htm

b. CONSUMPTION

Photo 7: Almonds in a nut store, to be sold as bulk, next to hazelnuts

Almond consumption for MY 2025/26 is forecast slightly higher compared to the revised figure of last MY at 65,000 MT; the increased price of pistachios will encourage consumption of more almonds. The MY 2024/25 consumption estimate is adjusted slightly upward to 60,000 MT.

At the end of August 2025 retail prices for roasted and raw almonds (shelled) were between 565-995 TL/kg ($14.13-24.88/kg). Prices ranged from 463-721 TL/kg ($13.61-21.21/kg) as of August 2024. [8] Retail prices vary by quality, neighborhood, and according to brand and retailer.

Almonds are mainly consumed as a snack food, and limited amounts are used in the confectionary and cosmetics industries. As with pistachios, packaging of almonds has increased in recent years. Currently, about half of almonds and other tree nuts are sold pre-packaged.

c. TRADE

Imports

Almond imports for MY 2025/26 are forecast at 80,000 MT, up from last year's newly revised number. As the pistachio crop is limited this MY (and its price is on rise), nut traders indicate that they will have to decrease the amount of pistachios in mixes and increase imported almonds. With demand expected to outpace the domestic supply, Turkiye is expected to remain a net importer of almonds in MY 2025/26, with the United States remaining its top supplier. Other countries supplying almonds to Turkiye include Australia, Spain, Chile, Uzbekistan, and Azerbaijan. The MY 2024/2025 import estimate is adjusted higher to 70,000 MT to reflect the latest trade statistics.

There are several taxes on imported almonds, including the MFN import duty, a minimum reference price, and additional financial responsibility tax. No import taxes are levied for almonds imported under the Inward Processing Regime (IPR) for processing (e.g., shelling, packaging) and re-export.

As previously reported, Turkiye issued a Presidential Decision Decree (PPD) in which it raised the MFN duty on imported almonds from 2-4 percent to 15 percent, starting on November 1, 2023. The 10 percent retaliatory tariff against U.S. almonds that existed since 2018,[9] was abolished on September 22, 2025. (See Post's report for details.) This gives equal opportunity to U.S. originated almonds.

Reportedly to discourage traders from under-invoicing imported almonds, Turkiye uses a minimum reference (oversight) price for customs valuation. As shown below, the current reference price is $4,400 for in-shell almonds and $6,900 for shelled almonds. If the CIF invoice value is at or below these set

[8] Foreign exchange rate by end of August 2025 is approx. 40 TL/USD and approx. 34 TL/USD by the end of August 2024.
[9] The retaliatory tariffs existed since 2018 because of U.S. Section 232 duties imposed on Turkish steel and aluminum put in place in 2018. Retaliatory tariffs were first set as 20 percent for tree nuts but in 2019 they were halved to 10 percent. See news on removal of the retaliatory tariffs by Turkiye: https://www.reuters.com/world/middle-east/turkey-says-it-is-ending-additional-tariffs-some-us-imports-2025-09-22/

reference prices, the tariff will be applied to the reference price. However, if the CIF invoice value exceeds the reference price, the tariff will be applied at the actual CIF invoice value.

Table 3: Reference Prices for Imported Almonds		
HS CODE	**COMMODITY**	**OVERSIGHT VALUE ON CIF** (USD/MT*)
080211	In-shell Almond	$4,400
080212	Shelled Almond	$6,900

*Ton: Gross Weight

In addition to a higher MFN rate, the above mentioned PPD also raised the additional financial responsibility tax (AFR) charged on imported almonds, as shown in the table below. The AFR is a flat tax that is charged on a metric ton basis.

Table 4: Additional Financial Responsibility Tax for Imported Almonds		
HS CODE	**COMMODITY**	**AFRT ON CIF** (USD/MT*)
080211	In-shell Almond	$580
080212	Shelled Almond	$942

One other notable change in the PDD was the announcement of preferential access for almonds coming from the United Arab Emirates (UAE). Tariff rates for in shell and shelled almonds coming from the UAE will be 4 percent, compared to the 15 percent MFN rate applied to all other origins. The AFR is also half the amount applied to other origins at $226/MT for in-shell almonds and $409/MT for shelled almonds. This preferential treatment will likely lead to more U.S. almonds going to the UAE, enroute to Turkiye.

Starting in May 2020, foreign suppliers of almonds, walnuts, cashews, and other agricultural items are required to register in an online system. Suppliers are asked to upload company information and other customer-verified documents. The purpose of the registration requirement is to discourage unofficial imports. For more information, please see Post's report on this registration requirement.

Exports

MY 2024/25 almond exports are forecast at 40,000 MT, which is slightly higher than the previous year's newly revised estimate of 37,000 MT. Most exports are thought to be re-exported almonds that originally came from the United States. The leading export destinations are regional countries, such as Russia, Iraq, Libya, Algeria, Syria, Saudi Arabia, and Uzbekistan.

d. POLICY

Please refer to the pistachio policy section for more details on the types and amounts of general support payments to almond growers, which are the same as pistachios.

In a press interview, the Chairman of the Turkish All Nuts and Dried Fruits Industrialists and Businesspeople Association (TUKSIAD) emphasized that high tariffs and taxes on imported tree nuts were partly to blame for the exorbitant prices of tree nuts in Turkiye, which are two to three times higher

than prices in Europe. He also stressed that these excessive charges on imported nuts leads to smuggling and other predatory practices that end up hurting domestic consumers and producers in the long run.[10]

The Turkish government, alongside universities and producer associations, is working to improve the country's almond production capacity. The most recent government-sponsored investment is the 2024 opening of the Agricultural Center of Excellence in Adiyaman province. The center, which features processing facilities for almonds, fresh fruit, and vegetables, as well as a greenhouse, provides training and other tools for growers and processors. The center's processing facility mirrors an earlier government investment to support the Agricultural Credit Cooperative Union in opening an almond and pistachio processing facility in Adiyaman province in 2018. In addition, since 2019, the municipal government in Adiyaman has been co-organizing an annual summit to discuss almond production, processing, pricing, and trade.

The Adiyaman Hard Shelled Fruits Research Institute, which was established by the government back in 2017, continues to work with the University of Adiyaman and other stakeholders to conduct research and training for almond growers. From 2021-2022, the Institute partnered with municipal authorities in Adiyaman to co-organize meetings for almond producers and beekeepers to come together to discuss and formalize areas of cooperation.

Photo 8: A luxury nuts and dried fruits store display in Turkiye.

[10] News in Turkish: https://www.hurriyet.com.tr/ekonomi/cerezde-mensei-oyunu-42481690

III. WALNUTS

a. PRODUCTION

MY 2025/26 walnut production is forecast at 47,000 MT, 22 percent lower than the previous year's revised estimate. The previously anticipated increase in production from bearing trees did not materialize because of a severe spring frost that affected walnuts throughout Turkiye. Additionally, as mentioned in Section I (Pistachios) of this report, precipitation was less than expected in winter 2024 and spring 2025, which negatively impacted trees that are not irrigated. Although many of the newer commercial orchards are irrigated, there are many older trees/orchards that are still rain-fed.

Walnut trees grow in almost every province of the country, but commercial walnut orchards are still a relatively new phenomenon in Turkiye. In the early 2000s, the GoT instituted various financial incentives to increase commercial walnut production, allocating free land for 49-years, providing interest-free financing, and delivering general support payments to farmers. The financial incentives, which have since come to an end, spurred farmers and others in the private sector to open new orchards throughout the country up until 2015. However, even with these new orchards, the domestic production of walnuts is still inadequate to meet growing consumer demand.

Photo 9: Walnuts on a tree in August 2024, few weeks before the harvest in the Trace region of Turkiye.

Up until the last 10-15 years, there was not a standard walnut variety being grown in Turkiye. However, as growers have come to appreciate that certain propagation techniques result in higher yields, the use of standard varieties has now become more widespread. Chandler is the most popular walnut tree variety. However, there is still a need for introducing higher-yielding varieties that are suitable for local growing conditions. Turkiye's leading walnut research establishment, the Yalova Ataturk Horticulture Research Institute, is developing new varieties for commercial production.

The Turkish Walnut Producers' Association (CÜD) was established in 2021 and held its first general assembly that summer. The association has close to 40 members, who are all large, commercial growers operating modernized farms with a combined area of 35,000-40,000 decares and 1 million walnut trees. The association aims to produce 19,000 MT for MY 2025/26, or about 40 percent of Turkiye's current production volume. The Association held an International Walnut Conference in September 2022 to discuss issues confronting the sector such as production trends, climate change, and branding.

b. CONSUMPTION

The MY 2025/26 consumption forecast for walnuts is 137,000 MT, slightly higher than the previous year's revised number. Consumption is expected to go slightly up since it is an off-year for pistachios. Lower production of pistachios might increase the use of walnuts in desserts such as baklava. Depending on the year, around 40 to 50 percent of total walnut consumption is supplied through domestic production. It will be less this MY due to frost damage.

Photo 10: Fresh harvested (not dried) Turkish walnuts for sale in a street bazaar in Istanbul, late August 2025.

As of August 2025, the retail price of shelled walnuts was between 650 - 1,100 TL/kg ($16.25 - $27.50/kg), compared to 300 - 680 TL/kg ($8.82 - $20.00/kg) a year ago. The retail price of in-shell walnuts in August was between 200 - 350 TL/kg ($5 - $8.75/kg), compared to 150 - 300 TL/kg ($4.41 - $8.82/kg) a year ago. [11]

In recent years, walnut consumption has increased significantly as consumers have come to realize their health benefits. The increase in packaged walnuts has also spurred consumption. However, most walnuts are still sold in bulk and in-shell. Turkish consumers purchase walnuts to use as an ingredient in everyday foods and eat them as snacks.

Walnuts are commonly used in desserts, just like pistachios. Turkish desserts such as pestil and köme are made by combining walnuts with mulberries and grapes. Walnuts are also used in baklava, ice cream, halva, cookies/cakes, breads/bakery, pastries, and in the dried fruit industry as well.

c. TRADE

Imports

Walnut imports for MY 2025/26 are forecast to increase to 135,000 MT, compared to the previous year's newly revised number at 108,000 MT. On top of domestic consumption, Turkish traders import, process, pack, and re-export walnuts to third countries. Traders agree that Turkiye will continue to be a net importer of walnuts, since domestic production is insufficient to keep pace with Turkish consumers' strong demand for high-quality walnuts.

China was the leader in supplying walnuts to Turkiye in MY 2024/25, followed by the United States, Chile, Uzbekistan, Ukraine, and Australia. U.S. walnuts are facing increasing competition from China and Chile due to price and seasonality considerations. According to traders, Chinese walnuts are much cheaper in price, which is a big advantage in times of economic difficulty in Turkiye. Market sources indicate that Chinese walnuts are not as good quality as U.S. walnuts (and Chilian), however as of MY 2024/25 their quality is acceptable to many Turkish consumers. As of September 22, 2025, though, U.S.

[11] The exchange rate was 40 TL/USD by the end of August 2025. The exchange rate was 34 TL/USD by the end of August 2024.

walnuts are now on equal footing when it comes to tariffs, as Turkiye removed Section 232 retaliatory tariffs on U.S. tree nuts and other agricultural products. The retaliatory tariffs had been a major hurdle for U.S. tree nut exporters, costing hundreds of millions of dollars in lost sales since 2018.

There are several taxes on imported walnuts, including the MFN import duty, a minimum reference price, and additional financial responsibility tax. No import taxes are levied for walnuts that are imported under the Inward Processing Regime (IPR) for processing (e.g., shelling, packaging) and re-export.

Last year, as previously reported, Turkiye issued a Presidential Decision Decree (PPD) in which it raised the MFN duty on imported walnuts from 4 percent to 15 percent, starting on November 1, 2023.

To discourage traders from under-invoicing imported walnuts, Turkiye uses a minimum reference (oversight) price for customs valuation. As shown below, the current reference price is $3,500 for inshell walnuts and $6,500 for shelled walnuts. If the CIF invoice value is at or below these set reference prices, the tariff will be applied to the reference price. However, if the CIF invoice value exceeds the reference price, the tariff will be applied at the actual CIF invoice value.

Photo 11: Imported walnuts on display on sidewalk in front of a nut shop in Istanbul, summer 2025. Other nuts like peanuts and hazelnuts are behind.

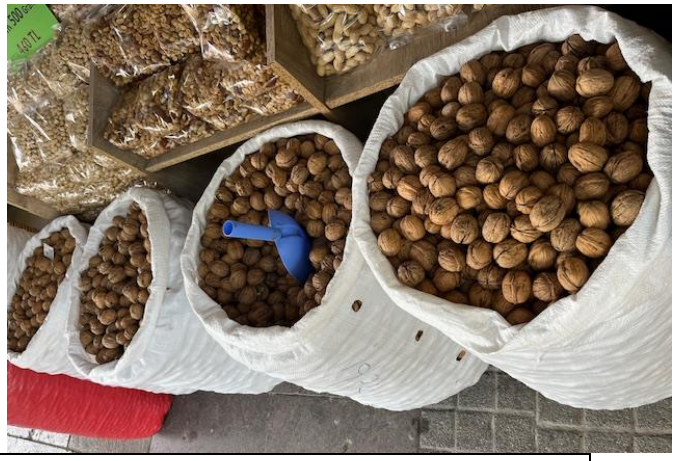


Table 5: Reference Prices for Imported Walnuts

HS CODE	**COMMODITY**	**OVERSIGHT VALUE ON CIF** (USD/MT*)
080231	Inshell Walnut	$3,500
080232	Shelled Walnut	$6,500

*Gross weight in metric tons.

Moreover, there is an additional financial responsibility tax (AFRT) charged on imported walnuts. The AFRT for shelled walnuts is raised to 1,099 USD/MT and 416 USD/MT for in-shell walnuts.

Table 6: Additional Financial Responsibility Tax for Imported Walnuts

HS CODE	**COMMODITY**	**AFRT ON CIF** (USD/MT*)
080231	Inshell Walnuts	$416
080232	Shelled Walnuts	$1,099

*Gross weight in metric tons.

According to the above mentioned PDD, an exception to the mentioned tariffs and taxes is the United Arab Emirates (UAE). Tariff rates for in-shell and shelled walnuts is 1 percent from UAE and the AFR for in-shell walnuts will be $153.50/MT and $286.50/MT for shelled almonds.

One other notable change in the PDD was the announcement of preferential access for walnuts coming from the United Arab Emirates (UAE). Tariff rates for in-shell and shelled walnuts coming from the UAE will be 2 percent, compared to the 15 percent MFN rate applied to all other origins. The AFRT on product from UAE is 153.50 USD/MT for in-shell walnuts and 286.50 USD/MT for shelled walnuts, which is significantly lower than the amount applied to other origins.

Exports

Walnut exports for 2025/26 are forecast at 45,000 MT, which is down slightly compared to the previous year's newly revised number. The export estimate for MY 2024/25 is revised lower to 33,000 metric tons based on the latest trade statistics.

Over the last decade, export volumes of walnuts have increased, which has caused traders to ramp up imports for processing and re-export. This trade has been in part fueled by the government's Inward Processing Regime (IPR) that allows Turkish companies to import walnuts duty-free, process them, and then re-export the final product to third countries. U.S. walnuts imported under IPR tend to be processed and re-exported to the Middle East and Africa.

d. POLICY

Please refer to the pistachio policy section for more details on the types and amounts of general support payments to walnut growers; like pistachios, walnuts are included in "other products." In addition to those supports, walnut producers can get 488 TL/da (= 2 x 244 TL/da) ($12.20/da) when they invest in a new orchard with standard saplings and 1,220 TL/da (= 5 x 244 TL/da) ($30.50/da), if they invest with certified samplings.

Photo 12: Dried Maras walnuts from Kahramanmaras province sold in a street bazaar. 100 TL/kg (2.5 USD/kg) more expensive than fresh harvest walnuts in Photo 10. Post assesses that these are Chinese walnuts, not Turkish walnuts from Maras as advertised.

The Turkish Walnut Producers' Association (CÜD) continues to lobby the government to increase tariffs on imported walnuts from the current rate of 15 percent to the maximum bound level of 43.5 percent. In contrast, during a press interview, the Chairman of TUKSIAD emphasized that high tariffs and taxes on imported tree nuts were partly to blame for the exorbitant prices of tree nuts in Turkiye, which are two to three times higher than prices in Europe. The Chairman also stressed that these excessive charges on imported nuts leads to smuggling and other predatory practices that end up hurting domestic consumers and producers in the long run.[12]

In June 2023 the CÜD launched a brand under its Turkish initials, CÜD, to help smaller producers come together under a single brand and sell larger quantities to retail stores in order to better compete against imported walnuts, which CÜD claims are inferior in quality to Turkish walnuts. [13] There was a trial sale of CÜD-branded product to select

[12] News in Turkish: https://www.hurriyet.com.tr/ekonomi/cerezde-mensei-oyunu-42481690
[13] News in Turkish https://www.yeniakit.com.tr/haber/yerli-ceviz-ceviz-ureticileri-dernegi-ile-markalasiyor-1763836.html

supermarkets, but Post did not observe widespread distribution. According to market sources, another reason for CÜD launching their own brand was to bypass middlemen and improve grower profit margins. As of 2025, this brand of walnuts is not visible in supermarkets/stores.

Additionally, there are claims that Chinese walnuts are sold in Turkiye as domestic produced walnuts. According to CÜD, these Chinese walnuts are of an inferior quality and cheaper, harming the market for Turkish walnuts. The newly established *"Walnut Realm Cooperative"* of Kahramanmaras province complained of the same issue, saying that Chinese walnuts are sold as "Maras Walnuts" in bazaars and stores (see Photo 11).[14]

Photo 13: Supermarket chain in Turkiye selling Californian walnuts, 2025.

[14] News in Turkish https://www.ekonomigazetesi.com/sektor-haberleri/cin-cevizini-tezgahlarda-yerli-ceviz-diye-satiyorlar-46245

IV. HAZELNUTS

Note: USDA does not maintain a Production, Supply, and Distribution table for hazelnuts.

Turkiye is the largest producer and exporter of hazelnuts in the world, accounting for about 60-70 percent of global production and around 70-75 percent of global exports. Production in MY 2025/26 is forecast higher year-over-year at 600,000 MT. Other market sources, as shown in the adjacent table, are predicting production will decline compared to last MY; some estimates are lower than others. The general consensus among market insiders is that production will decrease year-over-year but will probably be above these pessimistic predictions.

Table 7: Differing Production Estimates for Hazelnuts, 2025/26	
FAS-Turkiye	600,000 MT
TurkStat	520,000 MT [15]
Turkish Ministry of Agriculture and Forestry	449,000 MT
Turkish Grain Board	453,000 MT
Black Sea Hazelnut and Products Exporters' Union	601,206 MT [16]
International Nut Council (INC)	609,000 MT

The frost damage that occurred in spring 2025 affected hazelnuts, depending on the location and elevation of the orchards. Also, tempratures in the Black Sea region this summer were higher than average. Although in April 2025 there were claims of 30-35 percent crop loss for hazelnuts, as of September, market sources indicate that this is an exageration and that much of the predicted loss has not happened. High temperatures might have affected the quality of the hazelnuts, though.

Photo 14: Hazelnuts on display at a supermarket in Istanbul.

Most years, the Turkish Grain Board (TMO) purchases and stores hazelnuts on behalf of the government. At the beginning of August, MinAF announced the official purchase price and TMO started making purchases shortly thereafter. TMO pays the grower 21 days after receiving the hazelnuts in its warehouse.

The TMO purchase price for Giresun quality hazelnuts is 200 TL/kg ($5/kg), 52 percent higher than last year. The purchase price for Levant quality hazelnuts is 195 TL/kg ($4.88/kg), nearly a 50 percent increase compared to a year ago.

In addition to TMO purchases, the Union of Hazelnut Agriculture Sales Cooperatives (FISKOBIRLIK) sometimes purchases and stores hazelnuts to help keep domestic prices stable. As of end of August, the cooperative is purchasing Giresun quality hazelnuts at 260 TL/kg ($6.50/kg) from its members.

According to market news, hazelnut prices increased to 300-330 TL/kg ($7.50-$8.25/kg) as of mid-September.

[15] First forecast done by Turkish Statistical Institute (TurkStat) in late May 2025.

[16] After being passive and silent for some years Turkish National Hazelnut Council announced a production amount estimate in July 2024. Market sources indicate that it is interesting that suddenly NHC decided to do an estimate after years of silence.

The single largest buyer of Turkish hazelnuts is Italy's Ferraro Hazelnut Company, the owner of the Nutella brand. Ferraro is the biggest hazelnut trader in Turkiye, buying about one-third of Turkiye's annual hazelnut export volumes. Approximately half of Turkiye's hazelnut exports are handled by international companies, such as Ferraro.

Up until MY 2024/25, Ferraro publicly announced its purchase price, which was generally lower than the TMO price. However, following an industry complaint in November 2023, the Turkish Competition Authority (TCA) initiated a several monthslong investigation into Ferraro's practice of setting prices. After the investigation, Ferraro negotiated a settlement with TCA in which it agreed to stop announcing its purchase prices and to no longer purchase hazelnuts under the TMO price. Ferraro also reaffirmed its commitment to efficient and transparent markets. Ferraro appealed this decision, and the decision was canceled; however, by TCA's re-application to court of appeals, the court reaffirmed that the decision, right before the harvest in MY 2025/26, is binding for Ferraro.

Although hazelnuts are grown in more than 48 provinces around Turkiye, production is primarily concentrated along Turkiye's Black Sea coast. Hazelnut orchards are typically located within 30 km of the coast. In the western Black Sea region, the growing region starts at Zonguldak (east of Istanbul) and extends east along the entire Black Sea and the mountains until the Georgian border.

Photo 15: Fresh harvest hazelnuts on display at a street bazaar in Istanbul, late August 2025.

There are approximately 500,000 producers and 4 million people directly or indirectly employed by hazelnut production in Turkiye on an area of around 725,000 hectares. Hazelnuts require relatively little effort to cultivate and input requirements are low. However, with better maintenance, the yield efficiency of Turkish hazelnut orchards could easily be improved. Due to socio-economic conditions, Turkish hazelnut orchards are not well maintained, and the trees are aged with some orchards dating back as much as 70 years.

Turkish hazelnuts usually mature between early and late August, depending on the altitude of the orchard and weather conditions. Hazelnuts are hand-picked from the trees and dried in the sun. Harvesting takes place during several weeks in August and September.

V. PRODUCTION, SUPPLY AND DISTRIBUTION STATISTICS:

Pistachios, Inshell Basis	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Bearing Trees (1000 TREES)	0	58,150	0	60,550	0	62,400
Non-Bearing Trees (1000 TREES)	0	25,470	0	26,600	0	37,850
Total Trees (1000 TREES)	0	83,620	0	87,150	0	100,250
Beginning Stocks (MT)	85,000	85,000	95,000	95,000	0	200,000
Production (MT)	175,000	175,000	385,000	385,000	0	120,000
Imports (MT)	52,700	48,000	50,000	52,500	0	55,000
Total Supply (MT)	312,700	308,000	530,000	532,500	0	375,000
Exports (MT)	55,500	40,000	70,000	43,000	0	45,000
Domestic Consumption (MT)	162,200	173,000	260,000	289,500	0	165,000
Ending Stocks (MT)	95,000	95,000	200,000	200,000	0	165,000
Total Distribution (MT)	312,700	308,000	530,000	532,500	0	375,000
(1000 TREES), (MT)						

Almonds, Shelled Basis	2023/2024		2024/2025		2025/2026	
Market Year Begins	Aug 2023		Aug 2024		Aug 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (MT)	500	500	500	500	0	500
Production (MT)	24,000	24,000	27,000	27,000	0	25000
Imports (MT)	59,300	59,000	60,000	70,000	0	80000
Total Supply (MT)	83,800	83,500	87,500	97,500	0	105500
Exports (MT)	30,000	31,000	35,000	37,000	0	40000
Domestic Consumption (MT)	53,300	52,000	52,000	60,000	0	65000
Ending Stocks (MT)	500	500	500	500	0	500
Total Distribution (MT)	83,800	83,500	87,500	97,500	0	105500
(MT)						

Walnuts, Inshell Basis	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (MT)	1,300	1,300	1,300	1,300	0	1,300
Production (MT)	67,000	67,000	67,000	60,000	0	47,000
Imports (MT)	126,800	104,000	125,000	108,000	0	135,000
Total Supply (MT)	195,100	172,300	193,300	169,300	0	183,300
Exports (MT)	43,400	36,000	45,000	33,000	0	45,000
Domestic Consumption (MT)	150,400	135,000	147,000	135,000	0	137,000
Ending Stocks (MT)	1,300	1,300	1,300	1,300	0	1,300
Total Distribution (MT)	195,100	172,300	193,300	169,300	0	183,300
(MT)						

Source for PSDs: USDA forecasts, Post forecasts, TurkStat estimates for tree numbers.

Attachments:

No Attachments