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EU-28

Tree Nuts Annual

2017

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Report Highlights:
The European Union-28 is the largest export market for U.S. tree nuts. In 2016, tree nut shipments from the United States to the EU-28 reached $2.95 billion. Almonds totaled $1.6 billion in sales (both in-shell and shelled), followed by walnuts with almost $420 million and pistachios with $380 million. The growing popularity of healthier snacking and eating habits amongst European consumers is expected to continue the positive trend in nuts consumption.

Executive Summary:
Disclaimer: This report presents the situation and outlook for tree nuts (almonds, walnuts and pistachios) in the EU-28. This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

This report would not have been possible without the valuable expert contributions from the following Foreign Agricultural Service analysts:

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Monica Dobrescu, FAS/Bucharest covering Romania Marcel Pinckaers, FAS/The Hague covering the Benelux

Abbreviations and definitions used in this report

Conversion factors: conversion factor is used to convert shelled to in-shell tree nuts. Almonds: 0.6
Walnuts: 2.34
Pistachios: 2.0

GTA Global Trade Atlas
Ha hectare; 1 ha = 2.471 acres

HS Codes: Harmonized System codes for commodity classification used to calculate trade data.
Almonds: Shelled 080212; In-shell 080211
Walnuts: Shelled 080232; In-shell 080231
Pistachios: In-shell 080251, Shelled 080252 (since January 2012)

MT Metric ton = 1,000 kg
EU MS European Union Member State(s)

USD U.S. Dollar (Exchange rate at time of publishing €1=US$ 1.19)

Executive Summary:

US and EU: important trading partners

The European Union-28 (EU-28) is the largest export market for U.S. tree nuts. In 2016, tree nut shipments from the United States to the EU-28 reached $2.95 billion. Almonds totaled $1.6 billion in sales (both in-shell and shelled), followed by walnuts with almost $420 million and pistachios with $380 million.

In 2016, the EU-28 was the primary export destination for U.S. tree nuts, followed by East Asia and the Middle East. The EU-28 accounted for 33 percent of total tree nut exports, East Asia imported 26 percent of the total and the Middle East 12 percent. Within the EU, the most important trade partners for U.S. tree nuts are in order of importance Spain, Germany and the Netherlands, accounting for 60 percent of total EU-28 imports.

The United States continues to be the largest supplier of nuts for Europe, with 55 percent of the market share (in value) in 2016. Turkey ranks second with a market share of 19 percent, followed by Iran, Chile and Australia. Almond continues to be the main tree nut with almost 40 percent of EU tree nuts total imports. These numbers prove the importance of the U.S. as a trade partner to the EU.

Food processing and snack industry are key buyers of tree nuts

The growing popularity of healthier snacking and eating habits amongst European consumers is expected to continue the positive trend in nuts consumption. The fight against cardiovascular diseases and the promotion of general health and wellbeing, along with the publication of scientific studies stating the benefits of eating nuts, are likely to increase the demand for these products.

The European food processing and snack industry are the large users of tree nuts both as an ingredient for traditional sweets and pastries and to re-process and re-export to third countries. Almonds are mainly used as an ingredient for producing marzipan, nougat, turron (Spanish typical Christmas confection) and many other pastries and sweets. Walnuts and pistachio nuts are used as an ingredient for manufacturing ice cream and confectionary products.

The snacking industry is making efforts to offer consumers new products and new ways to consume nuts. Innovation is not easy though, especially in traditional markets such as Spain and Italy, where consumers have shown that in most occasions they still prefer the time-honored options.

Thus, due to the mature nature of the European market, manufacturers are focusing their strategies on launching new value-added, innovative products rather than volume sales and making emphasis in the health benefits of nuts, both through advertising campaigns and including this information in the packaging.

Expanding business in EU market

Since the EU remains a key export market for U.S. tree nuts, exporters continue to explore ways to expand their overseas business. Trade shows are an excellent opportunity both to know the market and to meet potential importers. Some of Europe's leading trade shows for tree nuts are:

Fruit Logistica in Berlin, Germany
Alimentaria, in Barcelona, Spain
SIAL in Paris, France
Anuga in Cologne, Germany
Snackex, changing location (next edition in Barcelona in June 2019)

Other relevant shows include Food Ingredients, Health Ingredients, Vitafoods, PLMA Amsterdam, for private label, and Biofach, for organic nuts. Finally, it would be advisable for new-to-the-market exporters to have a look at the EU-28 Food and Agricultural Import Regulations and Standards report and Exporter Guides produced at the various EU FAS Offices.

US cooperators active in the EU

Trade associations like the Almond Board of California, American Pistachio Growers and California Walnut Commission continue to develop strategies and host activities for the EU market. These trade associations, or so- called cooperators, in cooperation with FAS offices all over Europe, continuously work to further develop the market for U.S. tree nuts.

Commodities:
Almonds, Shelled Basis

Production:

The European Union is one of the world's leading producers and consumers of almonds. Furthermore, the EU is the single largest export market for California almonds, with Spain being the leading single-country market. Annually, California production is exported to more than 100 countries worldwide, and the EU-28 represents approximately one third of California's almond exports.

Spanish production has historically fluctuated greatly. Currently, the high prices paid for almonds are increasing the number of hectares of almonds planted annually as an alternative to the low prices in field crops. New varieties, modernization of the irrigation techniques, and the good prices reached in recent seasons are making Almonds more profitable for investors and improving the expectations of the industry.

For MY 2017, the latest official forecast published by the Ministry of Agriculture and Fisheries, Food and Environment (MAPAMA) estimates a production of 71,622 MT (shelled basis), a 20 percent increase compared to previous year's crop. This is a preliminary figure. According to the MAPAMA initial estimates, most of the main producing regions will increase their production compared to previous marketing year. Only Castilla-La Mancha, affected by severe drought, will see a 25 percent decrease in production.

On the phytosanitary side, *Xylella fastidiosa* represents a growing threat for tree nuts production in Spain, which is putting in place contingency plans to limit the expansion of the outbreaks of this bacterium. *Xylella fastidiosa* can devastate fruit trees plantations, including tree nut groves. So far, available phytosanitary solutions include destroying affected plant material, increased border control and the ban on the movement of plant material from the affected regions, in order to prevent the bacterium from spreading following the requirement established in Article 6 of EU Commission Implementing Decision 2015/879 as amended.

Please see link (Spanish language only) for Spain's containment plan. Outbreaks in the EU so far have been declared in olive plantations in the Italian province of Lecce, the Balearic Islands (Spain) and in tree nuts plantations in continental Spain (Alicante).

Italy is the second largest EU-28 almond producer after Spain. Sicily and Puglia are the main almond-producing areas, accounting together for approximately 88 percent of total supply. Tuono, Pizzuta d'Avola, Fascionello, Filippo Ceo, Fragiulio Grande, Genco, Falsa Barese, Ferragnés are the leading varieties grown in the country. Italy's MY (marketing year) 2017/18 almond production is forecast to drop by approximately 40 percent compared to the previous year due to the summer draught that affected the Italian peninsula. Quality is expected to be good.

Table 1. Major EU Almond Producers by Volume in MT (Shelled Basis)

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18
Spain	63,964	59,661	71,622
Italy	20,000	20,000	12,000

Source: FAS Europe Offices

Consumption:

Almonds represent an important component of the Mediterranean diet. In-shell almonds are mainly sold for fresh consumption. Shelled almonds are milled and generally used as a raw material for confectionary and bakery food companies.

Tree nuts imports are indispensable for EU consumers. Traditionally, consumers prefer locally grown products mainly for loyalty and habits, but since local production is not enough to satisfy the enormous demand, the industry depends on imports. Also, pricing plays a key role as domestic production leads to higher prices, pushing consumers to look for lower prices and therefore to imported varieties.

Trade:

Imports

In MY 2015, the United States was once more the main source of almonds for European importers. U.S. almonds face competition from locally grown almonds, particularly from Spain. The EU is consistently increasing their imports from Australia as production increases, but their export numbers to Europe are still very far from being a real competition. U.S. almonds will likely continue to enter the EU market with highly competitive prices.

The major EU-28 importers of U.S. almonds by volume were Spain, Germany and Italy in this order. Many countries import large quantities of almonds destined both for domestic consumption and re-export markets, as well as for the food and snack industry.

Table 2. EU-28 Imports of Almonds by Origin in MT (Shelled Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
United States	221,177	206,844	213,872
Australia	19,951	19,107	20,794
Morocco	1,544	2,009	1,511
Chile	465	449	1,154
Argentina	33	-	675
Syria	83	159	648
Others	2,804	1,706	1,178
TOTAL IMPORTS	**246,057**	**230,274**	**239,832**

Source: GTA

Exports

The top destinations for EU-28 almonds in MY 2015 were the United States, Switzerland and Melilla.

The largest almond exporter is Spain and Spanish exports are destined mainly for other EU MS.

Table 3. EU-28 Exports of Almonds by Destination in MT (Shelled Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
United States	3,476	6,178	5,342
Switzerland	1,704	1,854	1,789
Melilla	26	161	1,481
Ceuta	408	382	1,050
Canada	336	598	690
Australia	158	156	319
Others	4,676	3,941	4,121
TOTAL EXPORTS	**10,784**	**13,270**	**14,792**

Source: GTA

Production, Supply and Demand Data Statistics:

Almonds, Shelled Basis EU-28	2015		2016		2017		
	2015/2016		2016/2017		2017/2018		
	Market Year Begin: Aug 2015		Market Year Begin: Aug 2016		Market Year Begin: Aug 2017		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	0	650,470	0	685,160	0	685,160	(HA)
Area Harvested	0	570,989	0	570,609	0	570,609	(HA)
Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	(1000 TREES)
Beginning Stocks	20,000	20,000	18,000	18,000	0	18,000	(MT)
Production	96,000	94,929	95,000	90,696	0	103,242	(MT)
Imports	264,500	239,832	265,000	250,000	0	255,000	(MT)
Total Supply	380,500	354,761	378,000	358,696	0	376,242	(MT)
Exports	14,800	14,792	14,000	15,000	0	15,000	(MT)
Domestic Consumption	347,700	321,969	346,000	325,696	0	343,242	(MT)
Ending Stocks	18,000	18,000	18,000	18,000	0	18,000	(MT)
Total Distribution	380,500	354,761	378,000	358,696	0	376,242	(MT)

Source: FAS Europe Offices

Commodities:

Walnuts, Inshell Basis

Production:

A majority of walnuts (60 percent) produced in France are exported in-shell. Production and exports are increasing on the long run. Exports rose by 80 percent in ten years. However, France is a net importer of shelled walnuts. Due to high domestic processing costs, a part of the walnuts produced in France are shelled abroad, mainly in Moldova, and then imported back. Imports and consumption of shelled walnuts are increasing.

Walnut orchards continue to slowly grow driven by both export demand and an increased consumption of shelled walnuts.

In 2017, French walnut production is expected to remain stable. However, such figure hides a massive loss of 50 percent of the production in the South-west of France (Grande Aquitaine) because of a disastrous frost in late April 2017. On the other hand, the production in the South East of France (Rhone-Alpes region mainly) is expected to reach record level.

A significant share of the walnut production in both regions (about 35 percent) is produced under a GI (Geographical Indication) scheme: the "Noix du Périgord" in the South West (since 2002) and the "Noix de Grenoble" in the South East since 1938. The "Noix de Grenoble" producers' association regularly complains that foreign producers use the words (not protected in the U.S.) to market their own walnuts.

Italy lost its walnut market leadership a few decades ago and now is a leading importer, mainly from the United States. Most walnuts are cultivated in Campania (Southern Italy), where the main varieties are Sorrento and Malizia. Farmers in Northern Italy have established efficient and profitable walnut orchards planted with Lara and Chandler cultivars. Italy's MY 2017/18 walnut production is preliminarily forecast to increase to approximately 12,000 MT thanks to a good harvest in the South (9,500 MT compared to 6,000 MT in MY 2016/17) despite a slight production reduction in the Nord (2,500 MT compared to 3,000 MT in MY 2016/17) due to the frost in April. Quality is expected to be good.

In Spain, there main growing regions are Extremadura, Galicia, Valencia, Castilla-La Mancha, Andalucia, Aragon and Murcia. The MAPAMA has not yet published the official walnut production data for MY 2017. Therefore, if weather conditions are favorable, we can expect an average production of 15,000 MT for current MY.

Table 4. Major EU Walnut Producers in MT (In-shell Basis)

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18
France	42,281	40,471	40,000
Romania	33,400	34,100	33,000
Spain	15,300	13,700	15,000

Source: FAS Europe Offices

Consumption:

Walnuts are mainly purchased in winter time both in-shell and shelled for fresh consumption,

particularly during Christmas time. More consumers are increasingly purchasing walnuts all year round due to their perceived nutritional benefits and healthy snacking trends are expected to drive consumption in the forecast period. The continued release of studies and research showing the cardiovascular benefits have made walnuts very popular among health-conscious consumers

In this sense, California Walnuts continues to conduct very appropriate consumer advertising campaigns focusing on the health benefits of walnuts as well as the key messages of origin, quality and/or versatility. These actions have a very positive impact in the image of California Walnuts and increased the education on the health benefits of the product.

Trade:

Imports

The wide gap between EU walnut production and imports provides excellent opportunities for walnut exporters. The United States continues to be the number one supplier of walnuts, both in-shell and shelled. The EU imports various types of nuts for direct consumption as well as for further processing and re-export within the region in different forms, such as salted, baked, fried and mixed nuts.

Table 5. EU-28 Imports of Walnuts by Origin in MT (Inshell Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
United States	84,839	97,586	123,794
Chile	21,710	24,059	30,965
Moldova	23,280	24,476	23,396
Ukraine	19,855	22,172	14,064
India	5,822	2,256	4,566
China	5,014	3,402	1,691
Others	5,304	8,055	5,162
TOTAL IMPORTS	**165,824**	**182,006**	**203,638**

Source: GTA

Exports

EU-28 exports of walnuts are very limited. The top destinations for EU-28 walnuts in MY 2015/16 were Turkey, Moldova and Switzerland.

Table 6. EU-28 Exports of Walnuts by Destination in MT (Inshell Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
Turkey	7,818	4,215	5,521
Moldova	3,026	2,574	3,351
Switzerland	2,600	2,651	2,989
United States	1,745	708	674
Iraq	978	282	600
Jordan	727	598	594
Others	7,752	5,481	4,527
TOTAL EXPORTS	**24,646**	**16,509**	**18,256**

Source: GTA

Production, Supply and Demand Data Statistics:

Walnuts, Inshell Basis EU-28	2015		2016		2017		
	2015/2016		2016/2017		2017/2018		
	Market Year Begin: Aug 2015		Market Year Begin: Aug 2016		Market Year Begin: Aug 2017		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	0	54,924	0	58,083	0	58,763	(HA)
Area Harvested	0	46,857	0	46,290	0	46,970	(HA)
Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	(1000 TREES)
Beginning Stocks	35,000	40,000	40,000	40,000	0	40,000	(MT)
Production	116,000	117,928	113,000	116,670	0	116,140	(MT)
Imports	214,000	182,006	220,000	203,638	0	210,000	(MT)
Total Supply	365,000	339,934	373,000	360,308	0	366,140	(MT)
Exports	18,300	16,509	12,000	18,256	0	17,000	(MT)
Domestic Consumption	306,700	283,425	321,000	302,052	0	309,140	(MT)
Ending Stocks	40,000	40,000	40,000	40,000	0	40,000	(MT)
Total Distribution	365,000	339,934	373,000	360,308	0	366,140	(MT)

Source: FAS Europe Offices

Commodities:
Pistachios, Inshell Basis

Production:

Pistachio is a traditional crop in Italy, especially in the Sicily region (Bronte area) which accounts for approximately 90 percent of total supply. In recent years, pistachio production has slightly expanded to other areas in Sicily and Basilicata, where newer and input intensive orchards have been planted. *Bianca* (also called *Napoletana*) is the main pistachio variety grown in the country and is normally harvested in September. Since 2004, pistachios from Bronte have been designated by the European Commission as a PDO (Protected Designation of Origin), distinguishing it from all other pistachio varieties worldwide. Pistachio trees production is cyclical, bearing heavily in alternate years. Therefore, after the poor MY 2016/17 campaign, MY 2017/18 will be a 'higher' bearing year, but below the 4,000 metric tons of MY 2015/16 due to the frost in April and the hail in May that affected fruit set. Quality is expected to be good.

Table 7. Italy Pistachio Production by Volume in MT (In-Shell Basis)

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18
Italy	4,000	200	2,000

Source: FAS Europe Offices

It is worth noting the trend of pistachio production in Spain. Pistachio is not a traditional crop in Spain but in the last decade, the number of trees planted has increased significantly. Local pistachio production is still relatively small in Spain, but it is growing dynamically.

Table 8. Spain Pistachio Production

	2011	2012	2013	2014	2015	2016
Area Planted (ha)	4,279	5,274	5,754	7,334	10,529	14,974
Area Harvested (ha)	3,073	3,632	3,729	4,617	5,362	6,467
Production (MT)	2,708	2,681	2,489	4,052	4,764	5,618

Source: MAPAMA

By region, Castilla-La Mancha has seen the greatest increase in the number of trees and, thus, in production. In 2011, there were 3,409 trees in total in this region; 2,454 in production. In 2016, the total number was 10,916 trees, of which 4,898 were producing in the region.

Consumption:

Domestic EU pistachio production is not sufficient to cover domestic demand, resulting in significant imports from Iran and the United States.

The overall pistachios use can be split among many different ones starting from the in-shell basically traded as a snack food or as an ingredient employed by restaurant, shelled pistachios are used by bakeries and food companies (bakeries, cosmetic companies, sweet food companies and so on), while ice-cream makers mainly employ milled pistachios.

Trade:

Imports

The EU pistachio trade balance remained strongly negative, due to very limited local production. The

main suppliers for the European market are the United States and Iran, who together account for more than 90 percent of total imports, with an increasing relevance of Turkish pistachios. The United States is Iran's biggest rival regarding pistachio exports and production. In Europe, the quality of U.S. pistachios is appreciated, making it the main origin of EU imports.

Table 9. EU-28 Imports of Pistachios by Origin in MT (Inshell Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
United States	51,830	54,308	43,028
Iran	20,342	24,094	27,138
Turkey	1,581	2,026	5,032
Syria	431	159	94
Others	952	1,373	340
TOTAL IMPORTS	**75,136**	**81,960**	**75,632**

Source: GTA

Exports

EU-28 exports of pistachios are very limited. The top destinations for EU-28 pistachios in MY 2015/16 were Switzerland and Norway.

Table 10. EU-28 Exports of Pistachios by Destination in MT (Inshell Basis)

Country of origin	MY 2013/14	MY 2014/15	MY 2015/16
Switzerland	294	330	328
Norway	104	123	202
United Arab Emirates	25	1	168
United States	3	163	164
Others	847	744	1,039
TOTAL EXPORTS	**1,273**	**1,361**	**1,901**

Source: GTA

Production, Supply and Demand Data Statistics:

Pistachios, Inshell Basis EU-28	2015		2016		2017		
	2015/2016		2016/2017		2017/2018		
	Market Year Begin: Aug 2015		Market Year Begin: Aug 2016		Market Year Begin: Aug 2017		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	0	23,482	0	27,937	0	28,115	(HA)
Area Harvested	0	17,781	0	18,895	0	19,079	(HA)
Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	(1000 TREES)
Beginning Stocks	1,500	1,500	0	1,500	0	1,500	(MT)
Production	13,000	13,794	0	8,348	0	12,730	(MT)
Imports	70,000	81,944		85,000	0	82,000	(MT)
Total Supply	84,500	97,238	0	94,848	0	96,230	(MT)
Exports	1,300	1,383	0	1,500	0	1,500	(MT)
Domestic Consumption	81,700	94,355	0	91,848	0	93,230	(MT)
Ending Stocks	1,500	1,500	0	1,500	0	1,500	(MT)
Total Distribution	84,500	97,238	0	94,848	0	96,230	(MT)

Source: FAS Europe Offices

Commodities:
Almonds, Shelled Basis Walnuts, Inshell Basis Pistachios, Inshell Basis

Aflatoxin Certification for Tree Nuts

Aflatoxin certification is an import instrument for U.S. exports to the EU of almonds and pistachios. Information on the product specific programs is available from the respective commodity groups as well as from the USDA Agricultural Marketing Service (AMS).

Pre-Export Controls on Aflatoxins in U.S. Almonds

Article 23 of the EU regulation on official food and feed controls (Regulation (EC) No 882/2004) allows the EU to officially recognize a third country's system of pre-export checks (PEC) on feed and food prior to export as long as it meets the EU requirements. EU approval of a third country's system of pre-export checks may only be granted on the condition that the controls carried out in the third country are considered to be sufficient so that the import controls upon arrival to the EU can be significantly reduced.

The EU's Food and Veterinary Office (FVO) assessed the U.S. aflatoxin control system on almonds leading to the EU approval of the pre-export checks program for U.S. almonds in April 2015 in Commission Implementing Regulation (EU) 2015/949. Under this regulation, import authorities are directed to subject consignments of U.S. almonds with a PEC certificate to a less than 1 percent control level at the border. The PEC program is voluntary; a PEC certificate is not a requirement for import into the EU. Shipments without a PEC certificate do not benefit from the reduced inspection levels upon import in the EU.

For additional information on PEC aflatoxin certificates, please go to:

- Almond Board of California (ABC)
- USDA-AMS Laboratory Approval Service – Aflatoxin Program

Pistachios

For information on aflatoxin certification on pistachios, please visit:

- Administrative Committee for Pistachios (ACP)
- USDA-AMS Laboratory Approval Service – Aflatoxin Program

Extension of the Temporary MRL for Fosetyl

The 75 mg/kg temporary MRL for almonds, pistachios, walnuts, cashew nuts, hazelnuts, and macadamias was extended until March 1, 2019 by Commission Regulation (EU) 2016/75. The extension was granted on basis of an anticipated timeline for the submission for an import tolerance, initiated by the U.S. tree nut industry. U.S. residue trials and data analysis have been completed. The subsequent submission of the application for an import tolerance is on track with the original timeline.

Maximum Levels for Contaminants in Food

Maximum levels of aflatoxins (aflatoxins B1, B2, G1, G2 and M1) are laid down in Commission Regulation (EC) No 1881/2006.

If you would like to read more on the subject, the European Commission's web page on contaminants provides further specific information on contaminants in general, and Plant toxins and mycotoxins and aflatoxins in particular.

Author Defined:

Related Reports

Report Number	Title	Date Released
E17007	USEU – Phytosanitary Requirements for EU Import of Nuts	01/25/2017
IT1646	Italy Tree Nuts Annual 2016	12/16/2016
PO16	Poland – Dried Fruit and Nut Sector	11/23/2016
BU1634	Bulgaria Tree Nuts Annual 2016	10/19/2016
RO1612	Romania Tree Nuts Annual 2016	10/10/2016
SP1619	EU-28 Tree Nuts Annual 2016	09/22/2016
These reports can be accessed through the FAS GAIN Reports website		