Market evolution: Other nuts (CN 0802) — 2015–2025

Introduction

This report examines the evolution of extra-EU trade in *Other nuts, fresh or dried, whether or not shelled or peeled (excl. coconuts, Brazil nuts and cashew nuts)*, covering the period 2015–2025. The analysis draws on annual figures from the General Overview and complementary dashboard sections. The data reveal a market characterised by strongly rising imports, falling unit values, a persistent and high import reliance, and major reconfigurations in both trade partners and product mix.

Strong Import Expansion While Exports Shrink

Import volumes surged by more than half, pushing the trade deficit deeper despite lower prices

Between 2015 and 2025, EU imports of these nuts expanded substantially, while exports contracted. Import value rose by 22.8 %, but quantity jumped by 52.2 %, implying a broad-based decline in average import prices (–19.4 %). Exports lost ground both in value (–30.0 %) and volume (–23.9 %), with only a modest price reduction (–8.1 %). As a result, the extra-EU trade deficit worsened by 29.0 %, reaching –€5.62 billion in 2025.

Flow	Indicator	2015	2025	Change
Imports	Value (€)	4 869 million	5 977 million	+22.8 %
Imports	Quantity (t)	571 140	869 455	+52.2 %
Imports	Price (€/t)	8 525	6 875	–19.4 %
Exports	Value (€)	516 million	361 million	–30.0 %
Exports	Quantity (t)	65 907	50 188	–23.9 %
Exports	Price (€/t)	7 830	7 194	–8.1 %
Balance	€	–4 353 million	–5 616 million	–29.0 %

Source: General Overview

The EU remains overwhelmingly dependent on imports

The net-import-reliance ratio, measured as the share of apparent consumption covered by extra-EU imports, was already high at 83.1 % at the start of the period and edged up slightly to 83.8 % by 2024 (Net import reliance). This near-total dependence underscores the EU's vulnerability to supply disruptions in non-EU producing regions.

Geographic Reshuffling: Concentration on the Import Side, Diversification on the Export Side

The US consolidates its leading role, Chile emerges as a major supplier, while traditional partners Australia and Iran lose ground

Import sourcing has become more concentrated, with the Herfindahl-Hirschman Index (HHI) for import values rising from 3 177 to 3 435 (+8.1 %; Concentration HHI). The United States consolidated its position as the largest supplier, growing by 32.5 % to €3.31 billion. Chile's shipments soared by 271.3 % to €656 million, making it the third-largest source. By contrast, Australian imports collapsed (–68.0 %) and Iranian shipments dropped by 45.4 %. Chinese and Ukrainian supplies expanded considerably (+68.0 % and +70.9 % respectively), while Türkiye's presence receded (–15.9 %).

Import partner	2015 (€)	2025 (€)	Change
United States	2 495 million	3 305 million	+32.5 %
Türkiye	1 058 million	890 million	–15.9 %
Chile	177 million	656 million	+271.3 %
China	153 million	257 million	+68.0 %
Iran	220 million	120 million	–45.4 %
Ukraine	61 million	104 million	+70.9 %
Australia	208 million	66 million	–68.0 %

Source: Top partners by value

Export destinations become less concentrated as the UK and the US fade, while smaller markets rise

In contrast, the export HHI fell sharply from 2 236 to 1 361 (–39.1 %), indicating a more diversified customer base. The United Kingdom, once the top export destination, saw sales plunge by 60.6 % (from €212 million to €84 million), and shipments to the United States collapsed by 74.6 %. Stable Swiss demand (+22.5 %) and explosive growth in Albania (+400.3 %) and Egypt (from near-zero to a notable presence) partially offset these losses, but overall export values shrank.

Export partner	2015 (€)	2025 (€)	Change
United Kingdom	212 million	84 million	–60.6 %
Switzerland	74 million	91 million	+22.5 %
United States	89 million	22 million	–74.6 %
Türkiye	16 million	22 million	+33.4 %
Albania	2.0 million	9.9 million	+400.3 %
Norway	13.1 million	13.0 million	–0.5 %

Source: Top partners by value

Within the EU, Poland emerges as a major importer while most traditional exporting member states retreat

On the reporter side, Germany remained the top extra-EU importer (+17.0 %), but Italy (+66.8 %) and the Netherlands (+30.0 %) also recorded robust growth. Poland stands out with a 514.2 % surge in imports, signalling a new demand centre. Conversely, the leading exporting member states all lost ground: Spain (–25.2 %), Italy (–34.5 %), Germany (–20.4 %) and the Netherlands (–40.9 %). Only Greece bucked the export trend with a 123.9 % rise (Top reporters). This asymmetry suggests that a growing share of imported nuts is consumed within the bloc rather than re-exported.

Product Mix Transformation: Pistachios and Walnuts Propel Import Growth as Traditional Exports Wane

Shelled pistachios and walnuts drive the import surge, while almonds remain the largest volume item

Disaggregating by product segment (Product Segment Breakdown), the strongest import growth rates are found in shelled pistachios (+351 % in quantity), walnuts shelled (+147 %) and pistachios in shell (+75 %). Shelled almonds, the largest product by volume, also expanded (+24 %), as did shelled hazelnuts (+25 %). Only chestnuts in shell were virtually flat. All major imported products experienced falling unit prices, compressing the import bill despite volume gains.

Subheading (imports)	2015 (t)	2025 (t)	Quantity change
Almonds, shelled (080212)	222 592	276 465	+24 %
Hazelnuts, shelled (080222)	120 423	149 967	+25 %
Walnuts, shelled (080232)	59 835	147 712	+147 %
Pistachios, in shell (080251)	69 128	121 057	+75 %
Pistachios, shelled (080252)	7 817	35 306	+351 %
Walnuts, in shell (080231)	41 404	53 003	+28 %
Chestnuts, in shell (080241)	14 312	13 929	–3 %

Source: Product Segment Breakdown

Exports of almost all nut types decline sharply; only shelled almonds hold steady

On the export side, the contraction is widespread. Shelled almonds, the largest export item, managed a slight volume increase (+2 %), but all other major export categories recorded steep falls: walnuts in shell (–64 %), shelled hazelnuts (–53 %), pistachios in shell (–73 %), and shelled chestnuts (–45 %). Export unit prices were more mixed, with some declines (e.g., shelled almonds –31 %) and modest rises for others, but the overriding picture is one of shrinking EU nut exports across the board.

Subheading (exports)	2015 (t)	2025 (t)	Quantity change
Almonds, shelled (080212)	23 451	23 978	+2 %
Chestnuts, in shell (080241)	8 032	7 945	–1 %
Walnuts, in shell (080231)	11 452	4 098	–64 %
Walnuts, shelled (080232)	6 955	5 991	–14 %
Hazelnuts, shelled (080222)	4 107	1 928	–53 %
Pistachios, in shell (080251)	3 296	886	–73 %
Chestnuts, shelled (080242)	1 432	793	–45 %

Source: Product Segment Breakdown

EU production capacity is growing, but it appears to serve domestic needs rather than exports

Available production data—though rounded—indicate that EU nut output doubled in volume between 2022 and 2024 (from 314 000 t to 600 000 t), while the production value remained flat at around €1.0 billion (Production volumes). This suggests rapidly expanding self-supply, yet virtually all the additional domestic production is absorbed by the internal market, as extra-EU export volumes continued to shrink. The highest revealed comparative advantages in 2025 are found in Spain (RSCA +0.64) and Portugal (+0.53), but even these core producers are losing export momentum (Specialisation).

Conclusion

Over the last decade, the EU market for CN 0802 nuts has been reshaped by robust import growth, declining prices and an almost invariable 83 % import dependency. The import basket is now more heavily tilted toward shelled pistachios and walnuts, while the supplier map has become more concentrated around the United States and a fast-growing Chile. EU exports, in contrast, have dwindled across nearly all product categories and traditional destinations, even as domestic production expands. The combination of rising import reliance, weaker export competitiveness and persistent price deflation points to a sector in which the EU increasingly functions as a large consumption hub, exposed to external supply-side volatilities.

Data sources: all figures are taken from the interactive dashboard sections linked throughout the report, using the dataset covering 2015–2025.
