

Exporting pine nuts to Europe

Europe is the largest importer of pine nuts in the world. Pine nuts are a traditional ingredient in Mediterranean dishes and the product is benefitting from a growing consumer interest in Mediterranean cooking. Imports of pine nuts in Europe are growing. Spain, Germany and Italy are the leading pine nut importing countries. Despite the rising interest in pine nuts, consumption is fluctuating due to the unstable supply influencing prices.

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1. Product description

Pine nuts are the seeds in the cones of the pine tree (*Pinus*). Depending on the year and pine tree species, an individual cone holds between 50 and 100 seeds, each having a hard outer shell encasing the kernel.

Although every pine tree produces seeds, only certain species produce edible seeds. The most used in the international trade are pine nuts from the Chinese or oriental pine (*Pinus koraiensis*), Siberian pine (*Pinus sibirica*), Chilgoza pine (*Pinus gerardiana*) and Mediterranean pine (*Pinus pinea*). *Pinus edulis* and other pine trees native to Mexico and the Southwestern United States produce pine nuts which are important regional foods, but are not widely exported.

- Chinese pine nuts are native to China, North Korea, Mongolia and eastern Russia and have a triangular shape and brown cap around the tip.
- Siberian pine nuts, also called cedar nuts, are native to Siberia. They have a rounder egg-shaped kernel.
- Mediterranean pine nuts are native to the Mediterranean region. They are long in shape. They are generally considered very expensive, two to three times as much as Chinese pine nuts. Because of the price, they are traded in much smaller quantities.
- Chilgoza Pine Nuts are native to the northwestern Himalaya region, in eastern Afghanistan, Pakistan, and northwest India. They have a soft hull and a perfectly cylindrical, dark, dry tip.

Most of the harvest comes from wild forest trees and most harvesting is done by hand. This explains the high price of pine nuts compared to other nuts. Pinecones are collected by pine nut pickers, who sometimes climb the trees to pick the desired pinecones. However, mechanised harvesting also takes place. After harvesting, the pinecones are dried to stimulate the release of the pine nuts from the cones.

The process of drying pinecones can be natural, such as with Mediterranean pine nuts, where the cones are laid out on the ground and exposed to the sun. However, in most cases, for example with Chilgoza Pine Nuts, the cones are roasted to release the seeds. There are different methods to extract the seeds from dried cones. In Europe, this is usually done mechanically, but in other countries the seeds are extracted manually by beating the cones with wooden sticks.

To remove their shell, the nuts are soaked in water to make them softer. Wet pine nuts are classified by size and cracked with purpose-built machines. The kernels are cleaned and the skin is removed from the kernel. This skin can also be collected and used in cosmetics, for example for the production of facial masks, or in the home textiles industry as stuffing for mattresses, pillows and blankets.

As pine nuts are a forest product, it is very difficult to influence yields. Therefore, crops fluctuate from year to year. Some authors state that there is a pattern in production quantity, where crops run in cycles of five: three medium size crops, one large crop and one negligible crop, although the order of crop sizes is not uniform. In Europe, pine harvesting is allowed between December and March to prevent illegal harvesting before full maturity.

Pine nuts are widely used in prepared foods. Pesto, which is normally produced by blending pine nuts with basil, garlic and olive oil, is the one dish that greatly enhanced the popularity of pine nuts. Pine kernels are also used in a variety of sweet and savoury snacks, baking goods and salads.

Picture 1: Chinese pine nuts (*Pinus koraiensis*)



Source: Wikimedia commons

Picture 2: Mediterranean pine nuts (*Pinus pinea*)



Source: pixabay

This study covers general information about the pine nut market in Europe. For statistical trade analyses, the combined nomenclature code 08029050 (Pine "pinus spp." nuts, fresh or dried, whether or not shelled or peeled) is used.

Product specification

Quality

The basic quality requirements for pine nuts are defined by several criteria:

- Pine nuts must be intact, sound, clean, sufficiently developed and with uniform colour.
- Pine nuts must be free from pests, damages, moulds, rancidity and foreign smell or taste.
- Maximum moisture content: 7% per cent for *Pinus gerardiana*, 6% for *Pinus pinea* and 3.5% for all other pine nuts.

Specific pine nuts requirements are defined by the following criteria:

- **Class** — Pine nut classification is not officially defined in the European Union. However, the United Nations Economic Commission for Europe (UNECE) classification is widely used in the market. The UNECE classification divides cashew nuts into three main classes: Extra Class, Class I and Class II, according to allowed defects.
- **Sizing** — The European Union has not officially defined grading categories for pine nuts. The most frequently used grading classification, also by UNECE, uses the number of kernels per 100 g for eight different *Pinus* species.
- **Sensory characteristics** — In practice, quality and price are usually determined by the characteristics of pine nuts, combining taste, flavour, the look of the kernel and grade. There are some marketing efforts by producing countries to promote the taste of their own pine nuts as superior to others. Many attributes are used for this purpose, such as mild, strong, spicy, fine, creamy, or with a resinous flavour.

Tip:

Refer to the [UNECE standards](#) for quality requirements for pine nuts.

Labelling

The name of the product must be shown on the label ('pine nuts' or 'pine nuts kernels', for example), together with the botanical name of the species (*Pinus gerardiana*, for example). It is common practice to state the class, size, crop year and best-before date on the label.

Information about non-retail packaging must be given either on the packaging or in the accompanying documents. Bulk packaging labels must contain the following information:

- name of the product;
- lot identification;
- name and address of the manufacturer, packer, distributor or importer;
- storage and transport instructions are very important due to the high oil content, which can negatively influence the quality of product if not handled properly.

However, lot identification, and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In the case of retail packaging, product labelling must be in compliance with the [European Union Regulation on the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information) more clearly. This regulation lists nuts as products that may cause allergies or intolerances. However, pine nuts are considered to be seeds in the European Union for labelling purposes.

Packaging

Pine nuts are packed in different types of bulk or retail packaging. Pine nut kernels are typically packed in vacuum bags of different sizes from 1 to 12.5 kg, which are placed in cartons. Export packaging commonly includes two vacuum bags of 12.5 kg packed together in cartons, adding up to 25 kg in weight per box. Using vacuum bags helps to reduce the risk of oxidisation and maintain freshness during shipping and storage.

Pine nuts should be kept in clean and ventilated storerooms, not infected with pests and without foreign smell, at a temperature not exceeding 20° C, far from sun light, with relative air humidity not exceeding 70%. This way, storage life of pine nuts is 12 months from the date of production. When packed in packages without

vacuum, the expiration date is six months.

In practice, many European importers require that the storage life of pine nuts at the time of arrival at the warehouse does not exceed one third of total storage life period.

Tip:

See our study about [buyer requirements for processed fruit and vegetables](#) for more information about labelling and food contact materials.

2. Which European markets offer opportunities for exporters of pine nuts?

Spain, Germany and Italy are currently the largest European import markets for pine nuts and they offer you good opportunities. Markets with growing consumption or high consumption per capita, such as the Netherlands, offer additional opportunities. Small but growing markets, such as Denmark, Poland and Greece may also provide business opportunities for exporters.

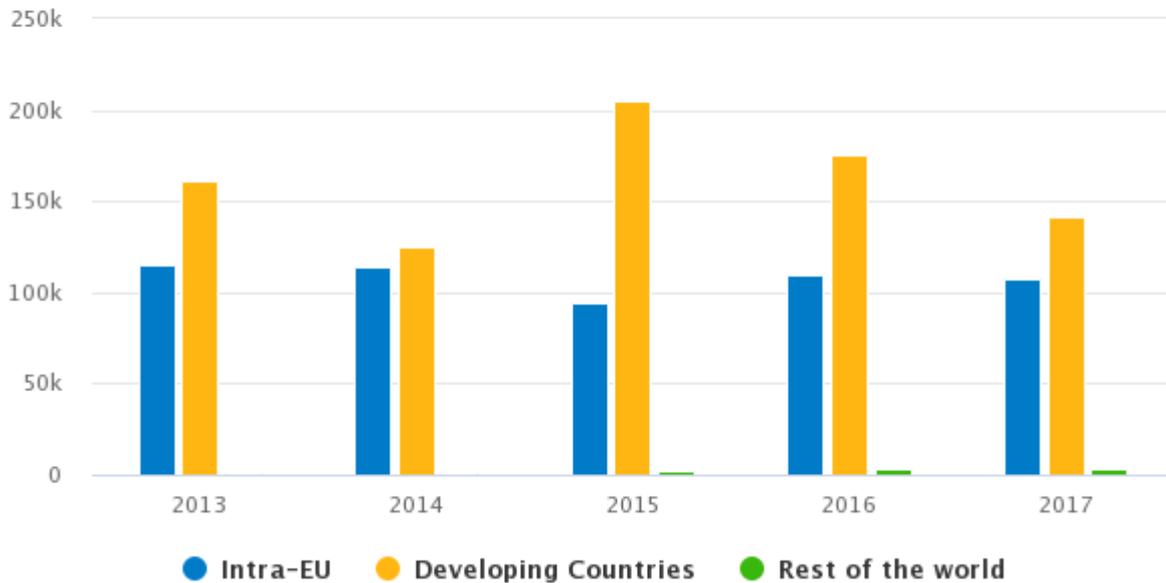
Imports

Decrease of import prices in 2017

- In the medium and long term, the European market for pine nuts is expected to grow. This growth is likely to be driven by changes in consumption patterns of European consumers, including a rising demand for vegetable sources of protein and the popularity of Mediterranean food.
- In the last five years, imports of pine nuts into Europe increased annually at an average rate of 10% in volume, but decreased by 2% in value. This means that import prices have declined. In 2017, imports reached €250 million for 29 thousand tonnes.
- The main reason for the drop in import value was a significant decline in prices of pine nuts from China in 2017. Fluctuating import volumes are caused by irregular pine nut crops in wild forests. World production of pine nuts fluctuates more than other edible nuts. This is normal, because it is difficult to control the production of wild forest trees.
- A lot of internal European trade consists of re-exports of pine nuts imported from developing countries. Practically all pine nuts imported from countries outside Europe are supplied by developing countries.

Figure 1: European imports of pine nuts, by origin

in € thousands



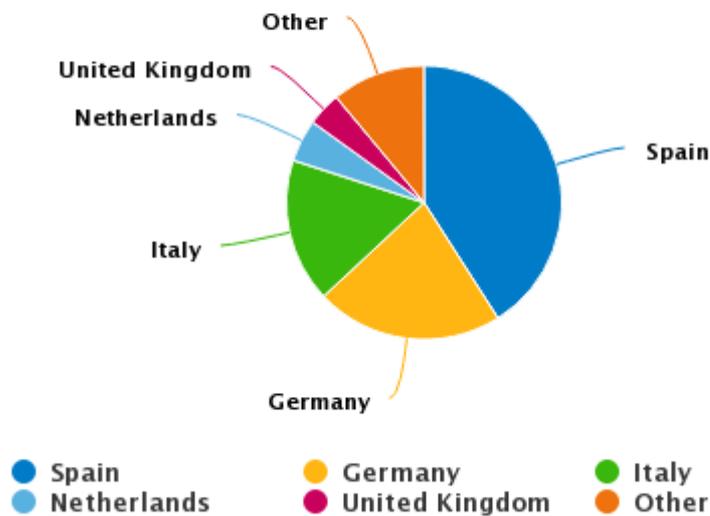
Source: Eurostat

Spain and Germany the leading importers

- The European import market for pine nuts is quite concentrated. The three largest importers, Spain, Germany and Italy, account for 80% of total imports.
- Spain and Italy are also important producing countries, but they cannot meet the needs of the local and European markets with their production alone. Italy specifically uses most of its imported pine nuts for the production of pesto.
- Spain had the largest import growth in Europe in the last five years. Spanish imports of pine nuts have tripled in the period, from four thousand tonnes in 2013 to 12 thousand tonnes in 2017.
- Besides Spain, the countries in the EU with a high annual average import growth rate in the 2013-2017 period include Denmark (59%), Poland (58%) and Greece (37%). Hungary had the highest average import growth rate in Europe (151%), but it accounts for only 0.3% of the total European pine nut market.

Figure 2: European imports of pine nuts by country in 2017, share of imported quantity

in %



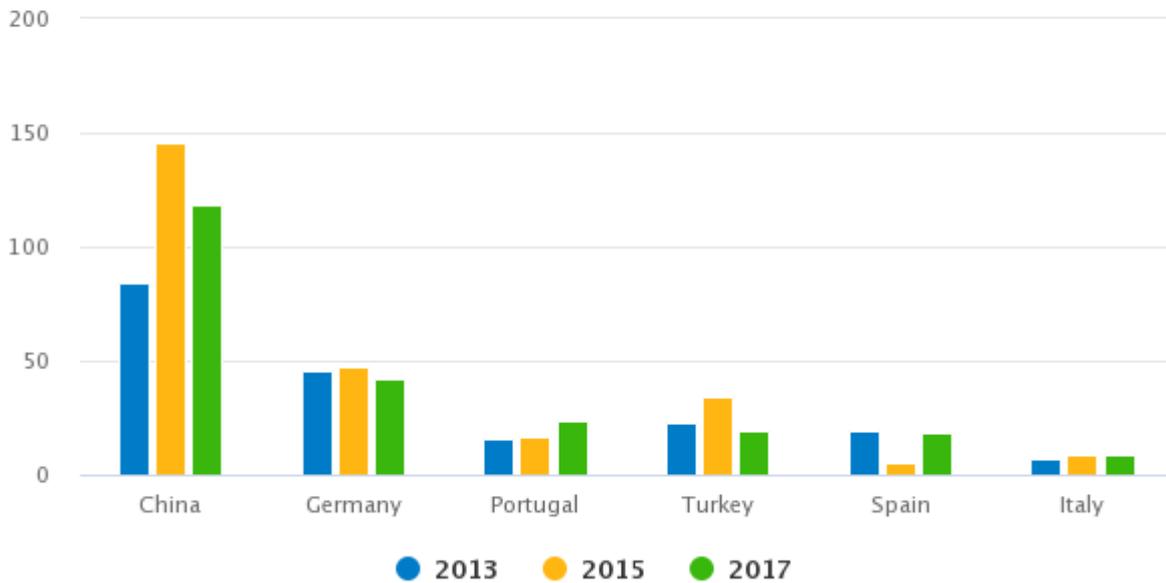
Source: Eurostat

China by far the leading supplier of pine nuts to Europe

- Most of the pine nuts in European trade are sourced from China. In addition to the many species of pine nuts produced in China, Chinese processing plants also import unshelled pine nuts from Mongolia, North Korea, Pakistan and Russia, then process and re-export them as Chinese pine nuts.
- European imports of pine nuts from China have almost doubled in the last five years. Imports from China increased from 5.2 thousand tonnes in 2013 to 9.5 thousand tonnes in 2017.
- Germany was Europe's second largest supplier of pine nuts in 2017. Usually, Pakistan is the second largest supplier of pine nuts to Europe. In 2017, imports from Pakistan were relatively low due to a small crop.
- Out of the leading external suppliers of pine nuts to Europe, Russia showed the most significant average annual growth at 68%, thus gaining some market share from China and Pakistan. However, Russia still has a small share of the European pine nut market at around 3%.

Figure 3: Leading suppliers of pine nuts to Europe

in € thousand



Source: Eurostat

Tips:

Identify the biggest importers of pine nuts in the large and fast-growing markets. Start by searching the Internet, or reading more about supply chains in Europe in our study on [market channels and segments for edible nuts and dried fruit](#).

Consider exporting to countries showing import growth, such as Denmark, Poland and Greece, in addition to targeting Spain, Germany and Italy, which are the largest European importers.

Learn from leading suppliers of pine nuts to Europe, such as those in China and Pakistan. Find information about the pine nut industry on the websites of the supplying companies or by attending events such as the [China International Tree Nuts Conference](#) and the [World Nut and Dried Fruit Congress](#).

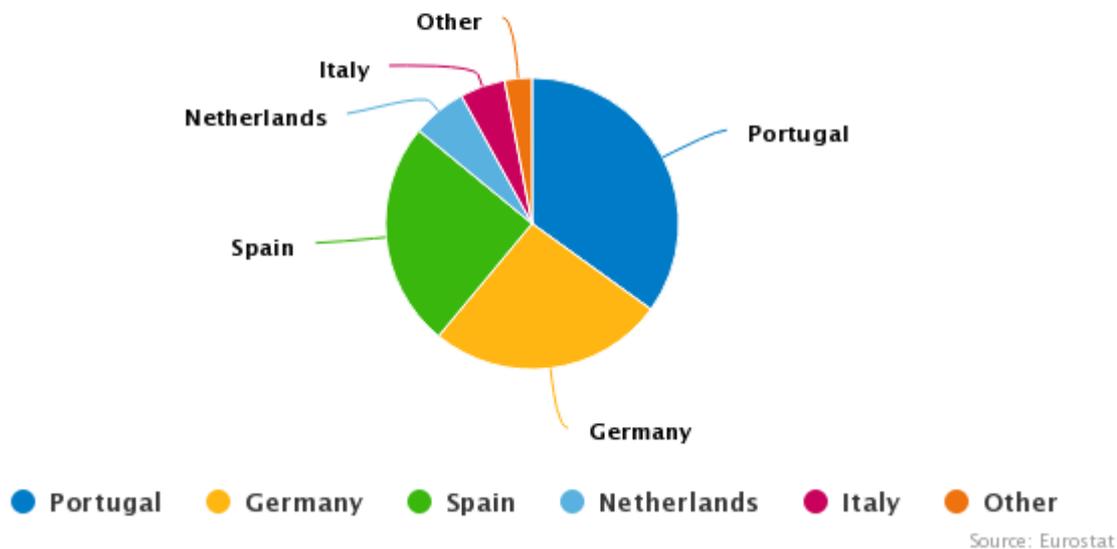
Exports

Portugal the largest European exporter of pine nuts in 2017

- The European export of pine nuts is very concentrated. The top three countries, Portugal, Germany and Spain, together represent almost 90% of the total European exports.
- The largest share of European pine nut exports consists of re-exports of imported products. Specifically, all German exports are re-exports, while Spain, Portugal and Italy export some of their own production.
- Germany re-exports more than 50% of the pine nuts it imported from China and other countries.
- Including intra-European trade, the value of European pine nut exports was stable at around €121 million between 2013 and 2017. In terms of quantity, exports grew at an average annual growth rate of 11% to reach 13 thousand tonnes in 2017. The faster growth rate of export volume compared to value indicates a drop in export prices.

Figure 4: European pine nut exports by country 2017, share of exported volume

in %



Italy the main target for European exporters of pine nuts

- Italy is the leading market for pine nuts exported from Spain and Portugal. In 2017, Italy imported 1,300 tonnes of pine nuts from Spain and 1,400 tonnes from Portugal.
- The Netherlands is the leading market for Germany's pine nuts re-exports. Germany re-exported 780 tonnes of pine nuts to the Netherlands in 2017.
- The leading European pine nuts export market outside European Union in 2017 was Turkey. However, Turkey is not usually an export market for European pine nuts, but rather a supplier. In 2017, Portugal exported in-shell pine nuts to Turkey, where local processors shelled and re-exported them as Turkish produce.
- Switzerland is usually the leading non-EU destination for pine nuts exported from EU Members, followed by Norway.

Tips:

Learn from German, Spanish and Portuguese pine nut exporters and their target markets in Europe. The leading target markets for internal EU trade are Italy and the Netherlands.

Consider finding opportunities in growing markets for pine nuts supplied by EU exporters, such as Switzerland and Norway.

Learn more about your competitors in our study on [competition in edible nuts and dried fruit](#).

Production

Pine nut production in Europe

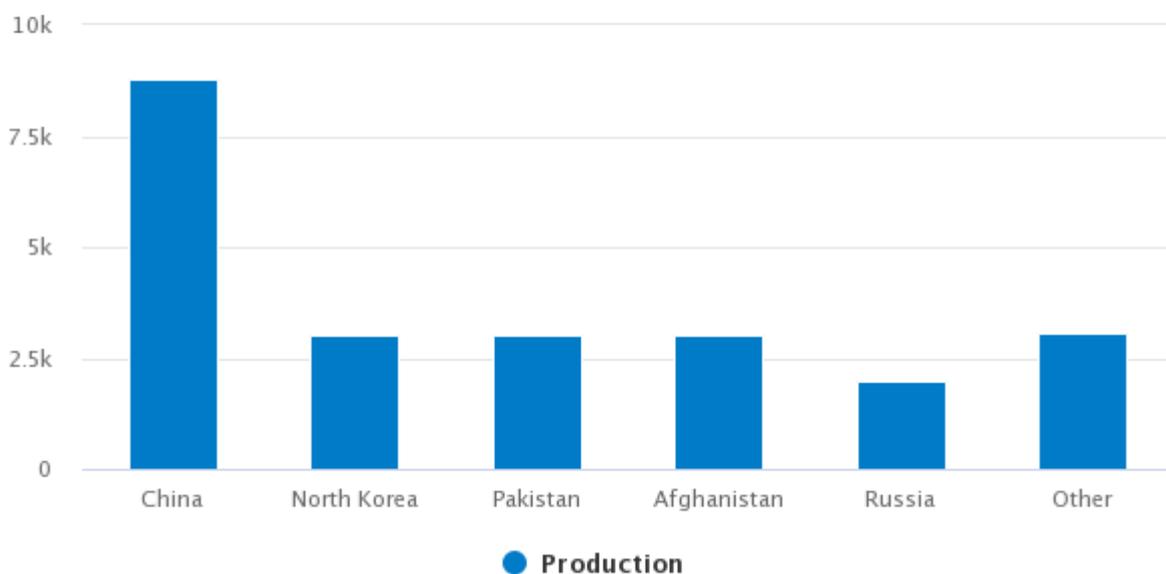
- The largest producing country of pine nuts in Europe is Italy, followed by Portugal and Spain. Italy accounts for around 4% of the total world production of pine nuts, producing an average of 900 tonnes per year.
- Production data is often unreliable, as there are no official statistics for the main producing countries. Therefore, production is based on estimations of producers and trading companies.

- Because Europe is not self-sufficient in the production of pine nuts, consumption must be satisfied through imports.
- The only type of pine nut produced in Europe is the Mediterranean pine nut, which is also produced in Turkey. Around the Mediterranean Sea, there are currently about 0.7 million hectares of Mediterranean pine forests. There is a growing area of Mediterranean pine nut forests planted on farmlands, especially in Portugal and Turkey. Farmland forests are expected to yield more pine nuts in the long term than natural forests.
- One of the problems that European producers face is the spreading of a conifer bug (*Leptoglossus occidentalis*), which sucks the sap of pine trees.

Pine nut production outside Europe

- According to the International Nut and Dried Fruit Council, overall world pine nut production followed a growing trend in the last 10 years, in spite of its irregular nature. World pine nut kernel production reached 23 thousand tonnes in the 2017-2018 season. In the last five years, global production amounted to an average of 26.4 thousand tonnes.
- In 2017-2018, China was the top producer with 39% of global production, followed by North Korea, Pakistan and Afghanistan with 13% each.

Figure 5: World pine nut production by country 2017, in volume



Source: INC

- Approximately 60% of the Chinese pine nut production and exports consist of *Pinus koraiensis*, 12% of *Pinus sibirica* re-exported from Russia and Mongolia, 9% of *Pinus yunnanensis*, 8% of *Pinus armandi* (used only as an ingredient after roasting for paste), 5% of *Pinus pumila*, 3% of *Pinus tabulaeformis* and 1% of *Pinus griffithii*.

Tips:

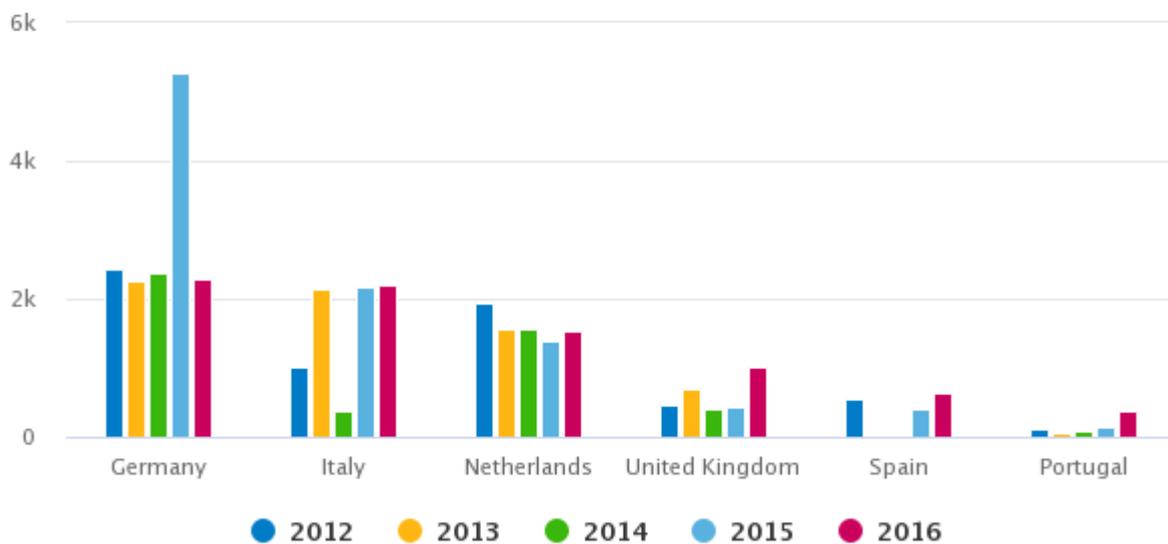
Learn from European producers who are investing in forest management and cooperating with forest institutes to protect pine forests and increase the productivity of pine trees. Good sources to learn more about Mediterranean pines are the [International Centre for Advanced Mediterranean Agronomic Studies](#) (type 'pine nut' into the search box) and the [PINEA Project](#).

Consider investing in research and breeding new pine tree varieties that could improve resistance to pests, improve kernel quality and decrease the time between planting and bearing periods.

Consumption

- The largest volumes of pine nuts in Europe are consumed in Germany and Italy. However, consumption fluctuates a lot, depending on availability and the highly unstable supply. The largest European consumer of pine nuts per capita is the Netherlands, with an estimated consumption of 0.4 kg per year in 2016.
- Pine nuts in Europe are consumed raw or roasted, or used as an ingredient in breads, candies, cookies, cakes, sauces, meat, fish and vegetable dishes.
- The most popular product in which pine nuts are used is pesto. It is a sauce made of basil, pine nuts, garlic and olive oil. The growing popularity of Mediterranean food across Europe is driving demand for pine nuts. Many consumers buy pine nuts to make pesto at home. However, pine nuts are also used as an ingredient in many other dishes in the Italian (especially Sicilian), Spanish, Portuguese, Turkish, Lebanese and Greek cuisine.
- The outlook for the consumption of pine nuts in Europe is positive, with fluctuations mainly caused by the expected changes in the international supply. Supply from China is not stable. Increasing domestic consumption in China and Russia can lower the availability of pine nuts for export in years with small harvests. In addition, since January 2018 China banned the import of pine nuts from North Korea, which potentially limits its own supply.

Figure 6: Leading European pine nuts consumption countries
in tonnes



Source: INC

Tip:

Check the website of the International Nut and Dried Fruit Council for [annual global pine nut production, export, import and consumption data](#).

3. Which trends offer opportunities in the European market for

pine nuts?

For a general overview of the most relevant general market trends for developing country exporters see our study on [trends for processed fruit and vegetables](#).

Consumer demand for vegan, gluten-free and natural foods open up opportunities in the European market for pine nut exporters. Food safety certification supported by frequent laboratory tests, coupled with adherence to corporate social responsibility standards can also be great advantages for suppliers to European markets.

Specific trends for pine nuts:

- The demand for pine nuts for the production of pesto is not guaranteed. Many industrial pesto producers substitute pine nuts with other nuts such as walnuts, cashew nuts and almonds. This allows them to maintain a stable pesto price and decrease dependency on pine nuts supplied by China. However, many producers keep using pine nuts in pesto to keep it 'original'. Some even insist on using Mediterranean pine nuts only.
- Pine nuts are becoming increasingly popular in home cooking. Consumers are using them as an ingredient for different types of dishes and often prepare homemade pesto. Although it is originally from Italy, pesto is also popular in many other countries.
- Several celebrity chefs are influencing the demand of pine nuts for home cooking, such as Ferran Adrià (Spain) and Gennaro Contaldo (Italy and United Kingdom). One of the major influencers promoting the Mediterranean diet is British celebrity chef [Jamie Oliver](#), who uses pine nuts in many published books and recipes. Additionally, pesto is sold under the Jamie Oliver brand in the United Kingdom, Germany, the Netherlands and Scandinavian countries.
- The growing popularity of healthier snacking and the changing eating habits of European consumers are expected to continue to drive the positive trend in pine nut consumption. The fight against cardiovascular disease and the promotion of general health and wellbeing, along with the publication of [scientific studies](#) attesting the benefits of eating nuts, are likely to boost the demand for pine nuts.

Tips:

Visit or exhibit at [Anuga](#), [SIAL](#) or [Food ingredients Europe](#). Participating in the leading European food trade fairs is the best way to monitor industry trends, but also to find prospects.

See our study about [dried fruits and edible nuts in Europe](#) to learn more about trends influencing demand.

Promote health benefits of [pine nuts](#) online and through social medial campaigns.

4. What are the requirements for pine nuts to be allowed on the European market?

In addition to the quality requirements mentioned in the product description, please refer to our study about [buyer requirements for processed fruit and vegetables](#) for a general overview of buyer requirements in Europe.

Legal requirements

All foods sold in the European Union must be safe, including pine nuts. This applies to imported products as well. Additives must be approved. Harmful contaminants, such as pesticide residues, and excessive levels of mycotoxins or preservatives are banned. It should also be readily obvious from the labelling whether a food contains allergens.

Food safety

The presence of very low levels of salmonella and E. coli in ready-to-eat or processed foods including pine nuts is an important cause of foodborne illness. Pine nuts handlers should consider salmonella and E. coli as major public health risks in their hazard analysis and critical control points (HACCP) plans.

European buyers of pine nuts commonly request laboratory tests of pine nut samples. The most common tests required are microbiological tests, such as salmonella, coliform or moulds, and tests on the presence of aflatoxins, radioactivity and pesticide residues.

Previous European border rejections of pine nuts often related to pine mouth syndrome, which is characterised by an unpleasant taste in the mouth after consuming pine nuts. This can last from a few days to a few weeks after consumption. Pine mouth syndrome is probably connected with the consumption of *Pinus armandii* and *Pinus massoniana* pine nuts, which are excluded from UNECE standard as inedible.

However, the [European Rapid Alert System for Food and Feed \(RASFF\)](#) has not reported pine mouth syndrome since 2014. In response to the increased incidence of pine mouth cases, Chinese authorities have implemented measures to accredit pine nut exporters and ensure that *Pinus armandii* pine nuts are no longer exported to the European Union.

The general maximum residue level (MRL) of pesticides for pine nuts is 0.01 mg/kg. However, according to the [EU legislation on pesticide for lambda-cyhalothrin](#), the European Food Safety Authority identified some information on certain metabolites of this pesticide and may change the MRL by 2020 after additional scientific research.

In June 2018, the European Union changed the MRLs for fosetyl-AL on tree nuts. The new MRLs were set at 500 ppm. Without this definitive MRL, the temporary level of 75 ppm that had been in place for the most commonly traded tree nuts would revert back to 2 ppm on March 1, 2019.

There has been concern about whether pine kernels should be subject to a novel food evaluation, especially since the Asian varieties used are different from the European. However, it appears that even the Asian varieties were already imported into Europe prior to 1997, so this evaluation would not be required.

Packaging requirements

Packaging used for pine nuts must:

- Protect the appearance, taste, flavour and quality characteristics of the product. Pine nuts in bags must not be stowed together with fibres or fibrous materials, since oil-impregnated fibres accelerate self-heating processes and rancidity.
- Protect the product from bacteriological and other contamination, including contamination from the packaging material itself. When container transport is used, damage due to moisture may arise if the water content of the cargo is too high.
- Not pass on any odour, taste, colour or other foreign characteristics to the product. Pine nuts are sensitive to unpleasant and pungent odours.

The safety of food contact materials must be evaluated to ensure no migration of unsafe levels of chemical substances to the food.

Labelling requirements

The [European Union Regulation on food labelling](#) forbids misleading consumers. Claims that a food can prevent, treat or cure human diseases cannot be made. Allergens must be highlighted in the list of ingredients. Requirements regarding information on allergens now also cover non-packed foods, such as those sold in restaurants and cafés. The list of allergens includes pine nuts.

Common requirements and niche requirements

- European importers often request food safety certification. The most common certification schemes accepted in the European market are [IFS](#), [FSSC 22000](#) and [BRC](#).
- Environmental protection, organic and fair-trade certification schemes are becoming more and more popular in Europe. As pine nuts are collected from wild forests, it may be possible to organically certify the whole area where pine nuts are collected, which can increase the competitiveness of pine nut suppliers.
- Sustainability and corporate social responsibility initiatives are becoming increasingly important in the European market. One such initiative is [FairWild](#), which promotes the sustainable use of wild-collected ingredients and ensures a fair deal for people involved throughout the supply chain.
- The European Union regulates both organic food and drink produced or processed within Europe and organics coming from non-EU countries. [Commission Regulation \(EC\) No. 1235/2008](#) details the rules on importing organic products from third countries.
- Organic products can readily be imported from non-European countries whose rules on organic production and control are equivalent to the European Union's, namely Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Tunisia, Switzerland and the United States. For all other non-EU countries, importers can [have their organic products certified](#) by independent organisations approved by the European Commission.

Tips:

Get food safety certification. However, check with importers and experts if the food safety certification company you have engaged is recognised by European buyers. Examples of independent international accredited certification companies include [SGS](#), [CIS](#), [TÜV SÜD](#) and [Bureau Veritas](#).

Consult the EU Trade Helpdesk where you can find [European Union legislation](#) for your selected products under the corresponding codes.

Check the International Trade Centre's [Sustainability Map](#) for information on commonly requested standards. It is an online tool that provides comprehensive information on more than 250 voluntary sustainability standards and other similar initiatives.

Be sure to declare the botanical name of the pine nut species on your export packaging and do not mix different types of pine nuts.

Check the [RASSF Portal](#) to get familiar with food safety notifications related to pine nuts.

Make efforts to improve the livelihood of pinecone collectors and provide a safe and healthy environment in pine nut processing factories. Learn how to improve your supply chain on the website of [FairWild](#).

Work in close cooperation with forest engineers and experts to ensure sustainable pine nut production. It is important to leave a certain number of pinecones and allow pine forests to naturally regrow.

5. What is the competition like in the European pine nuts market?

There are two main sources of competition: other edible nuts and the primary producing countries within the pine nut sector.

Pine nuts compete in the European market with all other types of edible nuts. However, pine nuts are most frequently substituted with almonds, walnuts and cashew nuts. The main reason for substitution is that pine nuts have a higher price per kilo than all other nuts. In addition, pine nuts are less frequently used as a salty snack than almonds, peanuts and cashew nuts.

Major company competition comes from the primary producing countries. Examples of company competitors include the following:

- Pinus koraiensis producers and exporters: [Jilin Painuo](#) (China), [Dalian QiYue Trading](#) (China), [Meihekou Guanlin](#) (China).
- Pinus gerardiana producers and exporters: [Pakistan Pine Nuts](#) (Pakistan), [Hussain & Sons](#) (Pakistan), [Hunza Organics](#) (Pakistan).
- Pinus sibirica producers and exporters: [From Wild](#) (Russia), [Leningrad Food Forest Resources Factory](#) (Russia), [Ruslana](#) (Russia), [Sibirsky Kedar](#) (Russia), [Kedr Eksport](#) (Russia).
- Pinus pinea producers and exporters: [Pinus Pinea](#) (Italy), [Sicil Pinoli](#) (Italy), [Agricoltura Italia](#) (Italy), [Pariani](#) (Italy), [Piñones](#) (Spain), [Piñónsol](#) (Spain), [PineFlavour](#) (Portugal), [Cecílio](#) (Portugal), [Habay Gida](#) (Turkey), [Kermes Tarim](#) (Turkey), [Hakki Karatosun](#) (Turkey).

Tips:

Be aware of potential competition from Russia. For now, Russia collects less than 20% of its pine nut crop because pine forests are located in unpopulated areas that are difficult to access. However, with the growing interest for pine nuts, this situation could change.

For more information, see our study about [competition in the European edible nuts market](#).

6. Which channels can I use to place pine nuts on the European market?

Many importers of pine nuts are also packers, which engage in processing, trading and wholesale distribution. After importation, products go on to different segments of the market as described in Chart 1.

Currently, pine nuts are consumed more as an ingredient than as a snack. As mentioned, pine nuts are particularly popular for the production of pesto sauce, but they are also used in the production of many bakery, confectionary and other products.

In some cases, you can also supply to different segments directly, without the importer as intermediary. However, in most cases, specialised importers or wholesalers make the first entry point into the European supply chain for exporters of cashew nuts from developing countries.

Examples of pine nut importers and traders include:

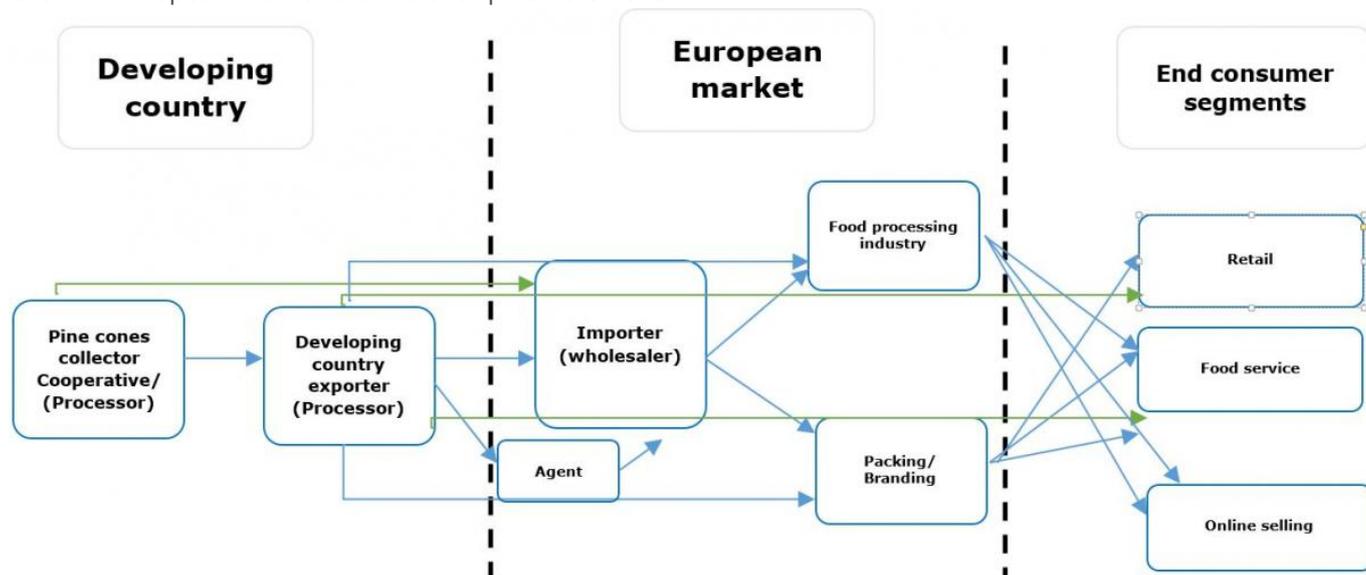
- Italy: [Besana](#), [Mapricom](#), [Murano](#), [Serfruit](#);
- Spain: [Levantex](#), [Importaco](#);
- Germany: [Seeberger](#), [Farmer's Snack](#), [Nutwork](#), [Alnatura](#);
- United Kingdom: [Community Foods](#), [Whitworths](#), [Prime Incorporation Limited](#), [Free World Trading](#);
- Netherlands: [Acomo Group](#).

Compared to other fruit products, agents still play an important role in the pine nuts and other nuts trade in Europe. Specialised agents represent pine nut exporters in the European market, but also supply European retailers' private label brands. Some examples of pine nuts agents are: [Pinfruze](#) (Spain), [Secoex](#) (Spain), [Brousse](#) (Germany) and [Connect](#) (Italy).

Online sales of food are still small in Europe but increasing. With more than 7% share of total supermarket purchases online, this type of grocery shopping is most popular in the United Kingdom. The majority of European supermarkets offer opportunities to purchase food online. Examples of platforms specialised in the

online sales of food products include [HelloFresh](#) (Germany), [Amazon](#) (Germany), [Ocado](#) (United Kingdom) and [Esselunga](#) (Italy).

Chart 1: European market channels for pine nuts 2018



Tips:

Check the website of [FRUCOM](#), the European Federation of the Trade in Dried Fruit & Edible Nuts, for the contacts of their national member associations in each country. Member lists of European edible nuts associations include different players of the whole supply chain.

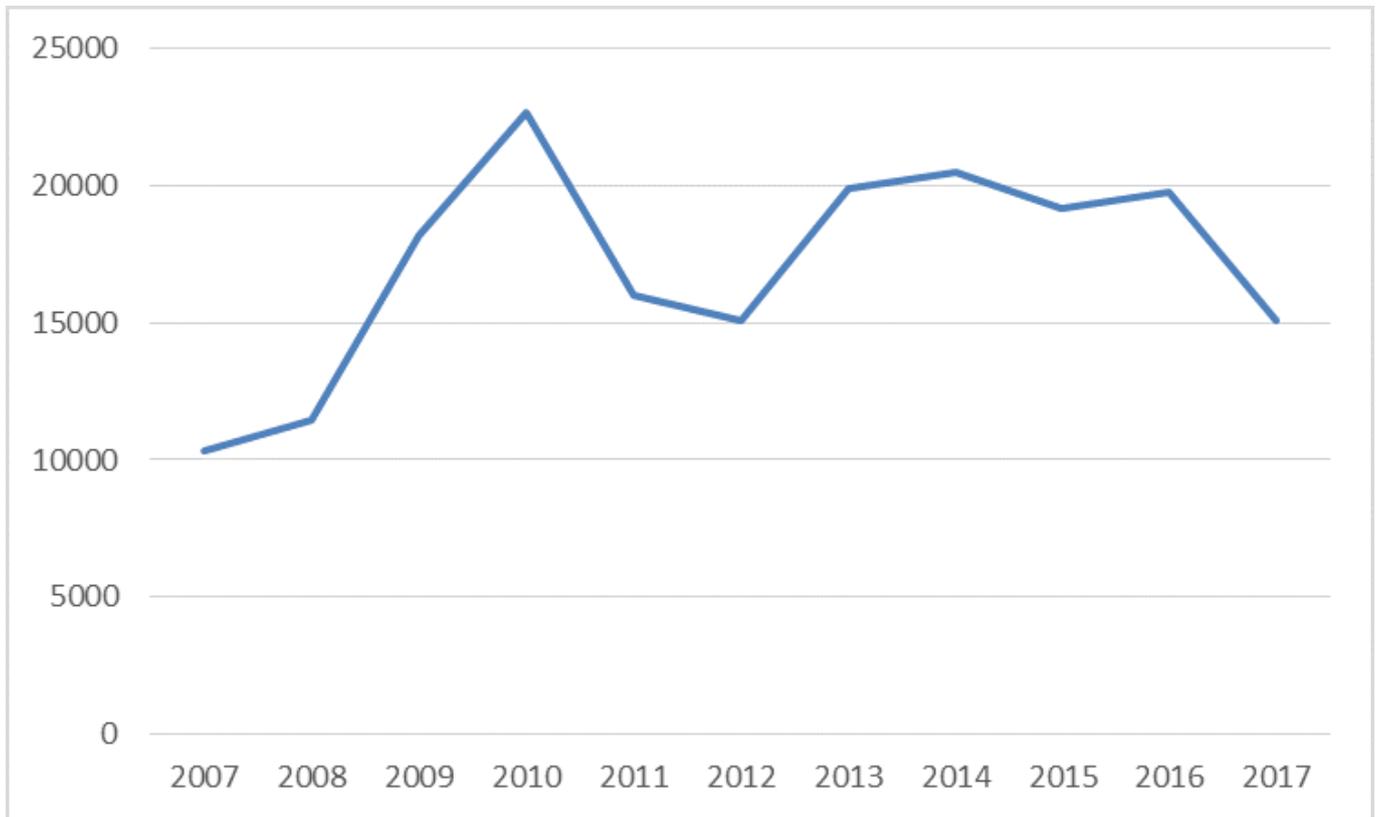
For more information, see our study about [market channels and segments](#) for edible nuts and dried fruit. Also read our tips about [doing business](#) and [finding buyers](#) in the European market for processed fruit and vegetables.

7. What are the end-market prices for pine nuts in the European market?

Calculating margins according to final retail prices for pine nuts is not indicative, since the entire sector has varying product prices depending on the region and harvesting season. Based on final prices alone, developing country exporters can only gain a very rough general overview of the price development. Mediterranean pine nuts usually achieve the highest prices in European markets.

Chinese pine nuts are usually taken as a reference price. Over the last 10 years, China's average export price was US\$17/tonne.

Graph 1: Average price of pine nuts exported from China, 2013-2017, US\$/tonne



Source: Chinese Customs

Current retail prices in most European supermarkets usually vary between €35/kg and €50/kg for small packs of 100 g of branded packed pine nuts.

The cost, insurance and freight (CIF) price of pine nut kernels represents approximately 30% of the retail price of a small package of pine nut kernels.

Table 1 below shows an approximate breakdown of the prices:

Table 1: Pine nuts retail price breakdown

Steps in export process	Price margins
Pine cone collecting	10%
Extraction of in-shell pine nuts	15%
Pine nuts shelling	17%
Warehousing and shipping	20%
Packing and distribution	35%
Retail	100%

Keep in mind that the share of the retail price that is paid to farmers varies a lot among producing countries.

If you add value to your products through differentiated quality, food safety, certification and processing steps, your prices will be higher. For example, organic and fair-trade certification and improved operations, such as mechanised processing, may increase profitability.

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