

Exporting almonds to Europe

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European almond imports are growing, driven mostly by a consumer trend towards healthier living. Almonds are the leading imported tree nuts in the European market. Spain, Germany and growing markets, such as the Netherlands and Italy, offer opportunities for exporters. Food safety certification supported with frequent laboratory tests and strong corporate social responsibility (CSR) standards are very important success factors for exporters.

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1. Product description

Almonds are the fruits of the almond tree (*Prunus amygdalus*). The almond fruit consists of four portions: kernel (meat), middle shell, outer green shell cover (almond hull) and a thin leathery layer (brown skin seed coat).

The commercial importance of the almond fruit is related to its kernel. Almonds are typically harvested by mechanical tree shakers which knock the almonds, still in their hulls, to the ground. The nuts are then gathered and delivered for the following processing steps of cleaning and grading.

After harvesting, the hull is removed and the almonds can be shelled, usually with shelling or cracking machines of different designs. Unshelled almonds can also be stored for later processing. Removing the brown skin with blanching machines produces blanched almonds, but exporters do not usually perform this step, since importers and processors also perform blanching operations.

Almond trees are grown in countries with Mediterranean climatic zones characterised by rainy winters and dry summers. The United States leads the global almond production with an approximate 80% share, followed by Australia, Iran and Tunisia. The growing world almond production surpassed 1.2 million tonnes in the 2017-2018 season.

The most popular Californian varieties are Nonpareil, Carmel, Monterey, Butte, Padre, Mission and Sonora. The most popular Spanish varieties are Valencia, Marcona, Largueta, Mallorca and Amarga. For marketing purposes, almond varieties are grouped in broad classifications based on distinguishing characteristics such as size, shape and 'blanchability'.

Picture 1: Whole almond kernels



Source: Flickr

Picture 2: In-shell almonds



Source: Pixabay

Picture 3: Whole blanched almonds



Source: Wikimedia Commons

Picture 4: Packed almonds ready for shipping



Source: Farmers International

This study covers general information about the market of shelled almonds in Europe. Table 1 shows the official statistical codes used in the international trade of almonds. Since European imports of in-shell almonds are insignificant, the statistical analysis in this study uses only the codes of shelled almonds, i.e. kernels.

Table 1: Products in the product group of almonds

Combined Nomenclature Number	Product
08021290	Sweet fresh or dried almonds, shelled
08021190	Sweet fresh or dried almonds in shell
08021210	Fresh or dried bitter almonds, shelled
08021110	Fresh or dried bitter almonds in shell

Product specification

Quality

The basic quality requirements for almond kernels include:

- Style — whole kernels up to 1/8 broken off make up the bulk of international trade, but almond pieces, which may be sliced, slivered or diced, are also traded;
- Colour — natural or blanched;
- Absence of any foreign matter, insects, mould, rancidity, spots or blemishes;
- Taste and flavour;
- Maximum moisture content of 6.5%.

Specific almond quality characteristics are defined by the following criteria:

- **Class** — Almond 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 almonds into three main classes: Extra Class, Class I and Class II, depending on the presence of allowed defects.
- **Sizing** — The European Union has not officially defined grading categories for almonds. The most frequently used grading classification, also by UNECE, grades almond kernels by a minimum kernel diameter, or by the number of almond kernels per 100 grams or ounce (28.3495 grams). The Almond Board of California has also developed more detailed classifications for specific almond varieties.
- **Special characteristics** — In practice, the quality and price of almonds is usually based on the characteristics of the almond kernels, such as presentation and variety, which determine taste and flavour.

Tip:

Refer to the [UNECE standards](#) and to [USDA almond standards and grades](#) for quality requirements for almonds.

Labelling

Export bulk packaging labelling of almonds must contain the following information:

- Name of the product, such as 'almond kernels' or 'almonds'. Other trade names regarding form can be used in addition to 'almonds', such as 'whole almonds' or 'blanched whole almonds'. It is common for export packaging labels to also include the variety name.
- Name and address of the manufacturer, packer, distributor or exporter.
- Origin of the product.
- Commercial specification: class, size and net weight. It is common, though not obligatory, to specify the crop year and best before date.
- Storage instructions — 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. Please note that this regulation lists almonds as products that may cause allergies or intolerances, and therefore allergen advice must be clearly visible on the retail packaging. Retail products must also be labelled in a language understood by consumers, so generally it will have to be in the official language or languages of each destination country.

Packaging

There is no general rule for the size of the export packaging of almonds, but the most common size for European markets is 25 kg, although many traders accept imperial units and packages of 50 lb (22.68 kg). Other sizes also used include 5, 10 and 12.5 kg packages. Cartons are a common type of packaging, often with a plastic liner inside. Normally, a 20 ft container is fully loaded with 450 bags of 25 kg, while a 40 ft container is loaded with 880 bags of 25 kg.

Almonds should have a minimum storage life of 12 months, when they kept in proper conditions. Temperatures between 2° C and 7° C, at 50–60% relative humidity, offer optimal storage conditions.

Tip:

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

2. Which European markets offer opportunities for exporters of almonds?

Spain and Germany are currently the largest European markets for almonds, offering good opportunities. The growing markets in the Netherlands and Italy also offer good opportunities, but you might face strong competition from the United States.

Imports

Increasing imports of almonds and regular price fluctuations

- In the long term, the European market for almonds is expected to grow steadily. Rising consumer demand for healthier foods, natural foods and snacks in general contribute to this growth. Almonds are the leading imported edible tree nuts in the European market. Although European imports of almonds are growing, cashew nuts are gaining market share from almonds.
- Between 2013 and 2017, European imports of shelled almonds increased at an average annual rate of 6% in value and 4% in volume, reaching €2.1 billion and 400 thousand tonnes. The value of imports varies according to import prices (see Figure 1). In volume, however, imports increased by more than 60 thousand tonnes in the last five years.
- Imports from developing countries represent only around 1% of all European almond imports. Only a few developing countries are gaining market share in Europe.

Spain and Germany are the leading importers

- The European import market for almonds is very concentrated. The main importers, Spain and Germany, account for more than half of all European almond imports. Both countries are big consumers of almonds, but Spain is also a main producer and a large transit country for almonds imported from the United States.
- Spain is an important trade hub for the re-export of Californian almonds within Europe, which usually arrive to the port of Barcelona. Spain re-exports on average more than 80% (approximately 80 thousand tonnes) of its shelled almond imports to other European countries. Other important European ports for almonds are Hamburg in Germany and Rotterdam in the Netherlands.
- With an average annual import growth of 10% in 2013–2017, Spain is the fastest growing market in Europe. Other countries with high average annual import growth rates in the same period include Netherlands (8%), Italy (7%), Romania (12%) and Portugal (8%).

United States by far the leading supplier

- The leading supplier of almonds to Europe is the United States, providing nearly 70% of all almonds sold in the European market. American shelled almond exports to Europe amounted to 242 thousand tonnes in 2017, at a value of more than €1.2 billion.
- The continuous growth of almond exports from the United States is strongly supported by the promotional activities of the [Almond Board of California](#).
- The leading developing countries supplying almonds to Europe in 2017 were Syria (728 tonnes) and Chile

(461 tonnes). Syria is also the country with the highest growth in almond exports to Europe in the last five years, expanding from 65 tonnes in 2013 to 728 tonnes in 2017. That means more than 11 times in volume, even during a civil war.

- Aside from Syria, other developing country suppliers gaining market share in Europe come from Argentina and Morocco.

Tips:

Consider targeting countries that are showing growth in imports, such as the Netherlands, Italy and Portugal, besides aiming to export to Spain and Germany, which are the largest European markets.

Learn from exporters which are gaining market share in the European market, especially those from the United States, Spain and Australia. Information about the almond industry and export strategies of fast-growing countries can be found on websites of national and regional sector associations, for example, the [Almond Board of California](#), [The Almond Board of Australia](#) and the [Spanish Almond Board](#).

Invest in good agricultural practices, such as irrigation, and carefully select the most suitable almond varieties to grow in your microclimate. Although the European market is dominated by almond varieties from the United States, this does not necessarily mean that those same varieties are the best for all growing areas.

Exports

Spain the largest European almond re-exporter

- European almond exports, including intra-European trade, has grown in value at an average annual rate of 7% since 2013, reaching €924 million in 2017. In volume, exports grew in the same period at an average annual rate of 3%, reaching 140 thousand tonnes. Most European exports are actually re-exports, since Europe is not self-sufficient in almond production.
- European exports are very concentrated. Spain alone accounts for nearly 60% of all European almond exports. Although Spain is the largest European almond producer, most of its exported almonds are actually re-exports, mostly originating from the United States.
- Significant quantities of almond kernels are not simply re-exported as received, undergoing further processing before moving forward. The most common processing method is roasting and baking the raw kernels, but other operations also take place, including blanching, salting, dicing, sieving and grinding.
- The highest annual export growth in volume in the 2013–2017 period was from Croatia (137%), followed by Ireland (66%) and Denmark (20%). However, the export volumes from these countries remain insignificant compared to the leading European exporters.

United States the main destination for European exports

- Regarding exports to countries outside the European Union, the main destination markets for European almond exports in 2017 were the United States, followed by Switzerland and Brazil.
- The highest annual growth of almond exports from the European Union in the last five years was to Brazil (86%), Australia (47%) and South Africa (92%).

Tips:

Learn from Spanish and German exporters and their target markets in Europe. The main Spanish almond export destinations within Europe are Germany, France, Italy and the United Kingdom.

Find opportunities in large or growing markets for almonds supplied by European traders and processors, such as Switzerland, Brazil and South Africa.

Production

Production of almonds in Europe is growing

- The production of almonds in Europe is growing, as well as the harvested area. According to official statistics, the almond harvested area increased from 638 thousand hectares in 2013 to 744 thousand hectares in 2017.
- World almond production also keeps growing year on year, reaching more than 1.2 million tonnes in the 2017-2018 season, up 5% from the previous season. The United States leads the world production. In 2017-2018, the US accounted for 81% of global production, followed by Australia (7%) and Spain (4%). Australia and Chile have significantly increased their production in the last several years.
- Spain is the largest processor of shelled almonds in Europe, accounting for approximately 70% of total European almond production. Spain's estimated shelled almond production in 2017 was 60 thousand tonnes. Other European producers include Greece, with a production of eight thousand tonnes, and Italy (six thousand tonnes).
- Spanish farmers are increasing their almond production, in some cases replacing traditional wheat and sunflower fields with almond orchards in the south of the country. The Spanish Almond Board expects the almond production in Spain to double in seven years. Almond processing is also growing in Spain. Descalmena, the [Spanish Almond Cracker Association](#), announced three new almond hulling facilities will open soon, adding to the existing 56.

Tip:

Consider supplying European almond processors, such as roasting companies and producers of marzipan, directly. Processors need regular supplies and they can be ready for long-term cooperation if your product meets their specifications.

Consumption

- Consumption of shelled almonds in Europe has grown at an average annual rate of 6% in quantity in the last five years, reaching 326 thousand tonnes in 2017.
- Almond consumption as a snack is seasonal in Europe, peaking in winter months and then falling towards the summer. The winter almond consumption peak relates to the Christmas and New Year holidays in European countries.
- In Europe, most almonds (approximately 60%) are consumed as snacks. The food processing industry uses the remaining 40% as an ingredient, mainly in the production of marzipan.
- The largest European consumer of almonds as a country is Germany, which had a total consumption of 73 thousand tonnes in 2016. Other major consuming countries include Italy (41 thousand tonnes), France (36 thousand tonnes), United Kingdom (23 thousand tonnes), the Netherlands (15 thousand tonnes) and Greece

(12 thousand tonnes).

- Spain leads the European per capita consumption of almonds at an estimated 3.15 kg per person per year, followed by Germany (1.79 kg), Netherlands (1.77 kg), Greece (1.67 kg) and Italy (1.39 kg). Germany, where chocolate-coated almonds are very popular, is also a large consumer of marzipan.
- The outlook for the consumption of almonds in Europe is positive, with stable annual growth between 3 and 5% expected. A driving factor in this expected growth is an increased consumer interest in healthy snacking. Almonds are promoted as rich in minerals and vitamins, especially vitamin E, as well as proteins, but low in saturated fat and cholesterol free, meaning that they may reduce the risk of heart disease.
- Almonds belong to the more premium segment of nut snacks and reach much higher prices than, for instance, peanuts.
- The Almond Board of California currently promotes almonds globally as a healthy snack option, especially as 'good for the heart'.

Tip:

Check the [Nuts & Dried Fruits Statistical Yearbook](#) of the International Nut and Dried Fruit Council for data on the global production, exports, imports and consumption of almonds.

3. Which trends offer opportunities in the European market for almonds?

Consumer demand for vegan, gluten-free and natural food offers opportunities for almond exporters.

Food safety certification supported by frequent laboratory tests and compliance with CSR standards can also be great advantages to European market suppliers.

Specific trends for almonds:

- Nuts, including almonds, enjoy a good reputation among European consumers. Consumption of nuts is expected to have the highest growth in the snack segment. In major consuming countries, cashew nuts are considered a healthier alternative to other savoury snacks, such as crisps and extruded snacks, and more beneficial to health than peanuts. Almonds and other edible nuts benefit from a preference for natural over processed products.
- Healthy snacking is the most important trend influencing the consumption of almonds. An increasing number of European consumers is replacing large meals with smaller portions or snacking more frequently. Instead of cooking and having a traditional meal at home, time-pressed consumers are increasingly turning to snack foods.
- Among the factors driving the increasing consumption of almonds are the celebrity chefs who increasingly use them as an ingredient on their culinary television shows.
- There is a growing number of new products with almonds as their main ingredient, including cookies, chocolate-based products, marzipan based products, snacks, fruit and nut bars, mueslis and almond drinks.
- Almonds are specifically promoted as good for heart health, rich in protein and fibre, gluten-free, good for weight loss, and for reducing risk factors leading to diabetes. The Almond Board of California is one of the major sources for scientific [nutrition research on the effects of almonds on human health](#).

Tip:

Learn how to [promote almond consumption](#) from the Almond Board of California.

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

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

Legal requirements

All foods, including cashew nuts, sold in the European Union must be safe. 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

Presence of aflatoxins is the most common reason for border rejections of almonds exported to Europe. In 2018, almonds (mostly from the United States) were rejected 35 times at European borders due to the presence of aflatoxin. Therefore, you are strongly advised to implement good post-harvest practices, especially good storage conditions to prevent aflatoxin contamination. Temperature and relative humidity are among the most important factors for preventing the development of *Aspergillus* and aflatoxin contamination.

The presence of very low levels of salmonella and *E. coli* in ready-to-eat or processed foods, including almonds, is an important cause of foodborne illness. Salmonella can be transferred to almonds from birds, other animals and humans who come into contact with the almonds during production and processing. It can also be found in open waters, waste piles, soil, etc. Aside from the implementation of good agricultural and hygiene practices, pasteurisation is now increasingly used to prevent salmonella outbreaks.

The general maximum residue level (MRL) of pesticides for almonds is 0.01 mg/kg. However, according to the [EU legislation on 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.

On June 5 2018, the European Commission published a regulation [setting the maximum residue levels for Fosetyl](#) at 500 ppm for the tree nut group including almonds. By February 2019, [maximum residue levels for the pesticide iprodione](#) in almonds were expected to be lowered from 0.2 ppm to 0.01 ppm.

Packaging requirements

Packaging used for almonds must:

- Protect the appearance, taste, flavour and quality characteristics of the product. Almonds 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. Almond kernels 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 almonds.

Almonds must be declared as a potential allergen in any product where they are used as ingredient. Products with undeclared almonds will be withdrawn from the market.

Nutritional information is now also mandatory for almonds.

Common requirements and niche requirements

- European importers often request food safety certification. The most common certification schemes accepted in European markets are [IFS](#), [FSSC 22000](#) and [BRC](#).
- Environmental protection, organic and fair-trade certification schemes are becoming more and more popular in Europe. To market their products as organic in the European Union, producers from developing countries must meet European [organic farming requirements](#).
- Sustainability and CSR initiatives are becoming increasingly important in the production of nuts. The [Sustainable Nut Initiative](#) was launched to enhance professionalism, sustainability and quality in the sector.
- 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, exporters can [have their organic products certified](#) by independent organisations approved by the European Commission.

Tips:

Follow the Code of Hygienic Practice for Tree Nuts and the Code of Practice for the Prevention and Reduction of Aflatoxin Contamination in Tree Nuts published by the [Codex Alimentarius](#).

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.

See the [California Almond Sustainability Program](#) for an example of a social responsibility programme used in the production of almonds. The aim of the programme is to motivate Californian producers to adopt cost-effective, environmentally and socially responsible practices through grower and handler assessment of current practices, also using aggregated results for communications, education and continuous improvement.

Make an effort to improve the livelihood of farmers and to provide a safe and healthy environment in almond processing factories.

5. What is the competition like in the European almonds market?

Almonds compete in the European market with all the other types of edible nuts. The increasingly popular cashew nuts are currently growing the most in market share among edible nuts in Europe.

Major company competition comes from the primary producing countries such as the United States, Spain and Australia, but also from emerging almonds producing countries such as Syria and Chile.

- The United States is the leading supplying country. Production in the United States is mostly located in California, from northern Tehama County to southern Kern County. California produces 80% of the world almond production. All Californian companies are united in the Almond Board of California. Some examples of almond companies in California include: [Blue Diamond](#), [Harris Family Enterprises](#), [Waterford Nut Company](#), [Monte Vista](#), and [Diamond](#).
- Examples of Spanish almond companies include: [LLOPIS](#), [Coato](#), [Almendras Francisco Morales](#), and [Almendras Lopez](#).
- Chilean production of almonds is concentrated in the regions of Rancagua and the Santiago Metropolitan Region. Land Irrigation is used in all almond commercial orchards in Chile. Examples of Chilean almond companies include: [Parmex](#), [Omninuts](#), [Frutexsa](#).

Tips:

Learn more about production, trends and developments in California at [The Almond Conference](#) organised by the Almond Board of California.

See our [competition study](#) for general information about competition in the European edible nuts market.

6. What are the channels to put almonds on the European market?

Many importers of almonds are also producers or packers, in addition to performing processing, trading and wholesale distribution. After importation, products reach different segments of the market as described in Chart 1.

Some developing country exporters can also supply to different segments directly, without using importers as intermediaries. However, for the most part, specialised wholesale importers make the first entry point into the European supply chain for exporters of almonds from developing countries.

Chart 1: European market channels for almonds, 2018

Importers

In most cases, direct importers also act as wholesalers. Importers and wholesalers very often sell almonds to roasting companies which process raw almond kernels and pack it for final sales. Some importers also have

processing and packing equipment, so they can reach final segments directly.

Importers usually have good knowledge of the European market and they monitor the conditions in almond producing countries. Therefore, they are preferred contacts, as they can inform you timely about market developments and provide practical advice for your exports. Almond importers normally import other types of edible nuts and dried fruit as well, so offering other products in addition to almonds can increase your competitiveness even more.

For new suppliers, the challenge is to establishing long-term relationships with well-known importers, as they usually already work with selected suppliers. Well known importers perform regular audits and visits to producing countries. As a new contact, very often you would need to offer the same quality but possibly better prices than your competitors, at the start of the relationship.

Examples of almonds importers and traders include: [Importaco](#) (Spain), [Borges](#) (Spain), [Fuster Nuts](#) (Spain), [Romani](#) (Spain), [Almendras de Almería](#) (Spain), [Seeberger](#) (Germany), [Nutland](#) (Netherlands) and [Besana](#) (Italy).

Agents

Agents involved in the almond trade typically perform two types of activities: as independent negotiators for their clients and as intermediaries between buyers and sellers. Typically they charge commissions of 2-4% for intermediary services.

Agents of supply to private labels of European retail chains. For most developing countries suppliers, it is very challenging to participate in the demanding private label tender procedures. For this service, some agents participate in the procurement procedures published by the retail chains in cooperation with almond suppliers.

Examples of almond agents in leading European markets include the following: [Fuster Nuts](#) (Spain), [Drynuts](#) (Spain), [hpm Warenhandelsagentur](#) (Germany), [MW Nuts](#) (Germany).

Snack and packing companies

The snack nut segment takes the largest share of pure almond volume in the European market. Different companies involved in almond packing and roasting or baking represent the snack segment. Most salted and snack almonds are sold in private brands' retail packaging but the share of private labels owned by retail chains is growing. In addition, significant quantities of almond snacks are sold non-branded, similarly to fresh fruit, especially in Central and Eastern Europe.

Examples of almond snack and packing companies in the leading European markets include the following:

- [Coselva](#) — Spain;
- [Importaco](#) — Spain;
- [Intersnack](#) — headquartered in Germany but active in several countries;
- [Seeberger](#) — retail snacks, Germany;
- [Ireco](#) — roasting company, Luxembourg;
- [Farmer's Snack](#) — retail snack, Germany;
- [East End Foods](#) — United Kingdom;
- [Humidinger](#) — retail snacks, United Kingdom;
- [Crazy Jack](#) — organic retail snacks owned by Community Foods, United Kingdom;
- [Noberasco](#) — retail snacks, Italy.

Almond processing industry

Confectionary and marzipan companies make up the largest share of the processing industry that uses almonds as ingredients. A large brand currently promoting Californian almonds is [Rafaello](#) (chocolate pralines), which belongs to the [Ferrero Group](#). A growing number of chocolate manufacturers are using almonds as ingredients,

including marzipan companies, such as [Odense Marzipan](#), [Lübecker](#) and [Caldic](#).

Almonds are also used in home baking, as well as by the bakery industry. Other industry segments include nut and fruit bars, mueslis and nut spreads. One category growing significantly is almond milk. Established brands of almond milk include Belgian [Alpro](#), Austrian [Joya](#) and Italian [Isola Bio](#).

A small share of imported almonds is used for the production of almond oil.

Tips:

See how these large producers from Spain present themselves to importers and agents on their websites: [Crisolar](#), [Mañan](#), [Borges](#) (which also produces in California) and [AlmenSur](#).

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 almonds in the European market?

Calculating margins according to final retail prices for almonds is not indicative, since the entire sector has varying prices generally connected to the production volume of the United States and to a smaller extent Spain. In years of overproduction, prices drop. For some specific varieties, such as Nonpareil, prices are higher. Based on final prices alone, developing country exporters only have a very rough general overview of the price development.

Graph 1: Almond kernel price development in 2017, CIF, USD/pound



Source: IEG Vu

The cost, insurance and freight (CIF) price of raw almond kernels represents roughly 50% of the retail price of a retail package of almonds. In cases where a final retail product is sold directly to retail chains, this share is much higher. The average retail prices for raw, non-peeled almonds in Europe usually fluctuate between €10 and €15 per kilo, depending on the size and brand of the packed nuts.

Tip:

The best way to monitor prices is to compare your offer with the offer from the largest competitors.

If you add value to your produce through differentiated quality, food safety, certification and processing steps, your prices will be higher. For example, organic and fair-trade certification may add value to the products.

Please review our [market information disclaimer](#).