

HAZELNUTS ROUND TABLE



INC XL WORLD NUT AND
DRIED FRUIT CONGRESS

MAY 22-24, 2023

Panel

- Chair: **Hasan Sabir**, General Manager, Sabirlar, Türkiye
- **Riccardo Calcagni**, CEO, Besana Group, Italy
- **Larry George**, President, George Packing Company, USA
- **Jorge Mohr**, Director, Nefuen Trading, Chile

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Program

1. Crop Forecasts / Acreage / Productivity
2. Consumption / New Markets / New Products / Promotion activities.
3. Sustainability / Due Diligence
4. BMSB update
5. Conclusion
6. Q & A



ESTIMATED WORLD HAZELNUT PRODUCTION

In-shell Basis. Metric Tons

COUNTRY	2022/2023				2023/2024			
	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK
TÜRKIYE	105,000	830,628	935,628	215,000	215,000	810,000	1,025,000	215,000
ITALY	10,000	90,000	100,000	5,000	5,000	110,000	115,000	10,000
USA	12,000	72,400	84,400	5,000	5,000	77,100	82,100	5,000
CHILE	500	54,000	54,500	0	0	65,000	65,000	200
AZERBAIJAN	3,000	55,000	58,000	2,000	2,000	60,000	62,000	3,000
GEORGIA	5,000	40,000	45,000	0	0	50,000	50,000	1,500
CHINA	1,500	30,600	32,100	2,800	2,800	30,000	32,800	2,000
SPAIN	500	7,000	7,500	500	500	25,000	25,500	2,000
IRAN	500	12,000	12,500	600	600	18,000	18,600	2,000
FRANCE	700	5,500	6,200	0	0	10,000	10,000	2,000
OTHERS	0	30,000	30,000	0	0	30,000	30,000	0
WORLD TOTAL	138,700	1,227,128	1,365,828	230,900	230,900	1,285,100	1,516,000	242,700

WORLD CONSUMPTION (T. Supply - End. Stock) 1,134,928

Sources: INC Industry sources, Black Sea Hazelnut Exporters Association, Oregon Hazelnut Industry Office, Hazelnut Committee of Chile, Hazelnut Processors and Exporters Association of Georgia, China Chamber of Commerce for Import and Export of Foodstuffs, and Almendrave.

Post-congress update: The Spanish 2023/24 crop forecast presented at the congress has been amended right after the event as per Almendrave's projection.

ESTIMATED WORLD HAZELNUT PRODUCTION

Kernel Basis. Metric Tons

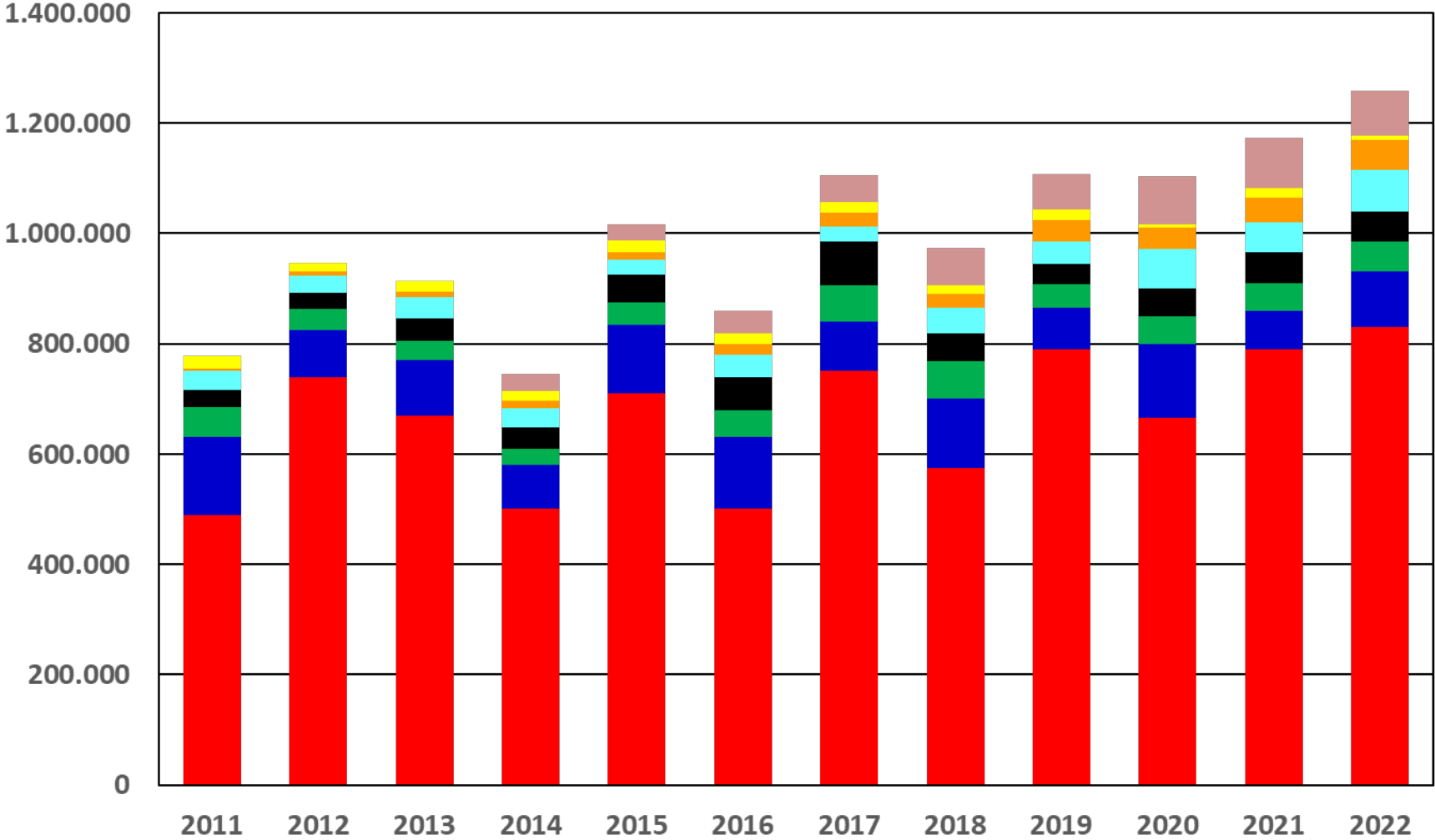
COUNTRY	2022/2023				2023/2024			
	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK
TÜRKIYE	52,500	415,300	467,800	107,500	107,500	405,000	512,500	107,500
ITALY	4,650	38,700	43,350	2,150	2,150	51,700	53,850	4,700
USA	5,280	31,900	37,180	2,200	2,200	33,900	36,100	2,200
CHILE	215	23,220	23,435	0	0	27,950	27,950	86
AZERBAIJAN	1,140	24,000	25,140	880	880	26,400	27,280	1,320
GEORGIA	1,900	14,800	16,700	0	0	19,000	19,000	570
CHINA	600	12,850	13,450	1,180	1,180	12,600	13,780	840
SPAIN	250	3,500	3,750	250	250	12,500	12,750	1,000
IRAN	225	5,400	5,625	270	270	7,600	7,870	840
FRANCE	280	2,200	2,480	0	0	4,000	4,000	800
OTHERS	0	12,600	12,600	0	0	12,600	12,600	0
WORLD TOTAL	67,040	584,470	651,510	114,430	114,430	613,250	727,680	119,856

WORLD CONSUMPTION (T. Supply - End. Stock) 537,080

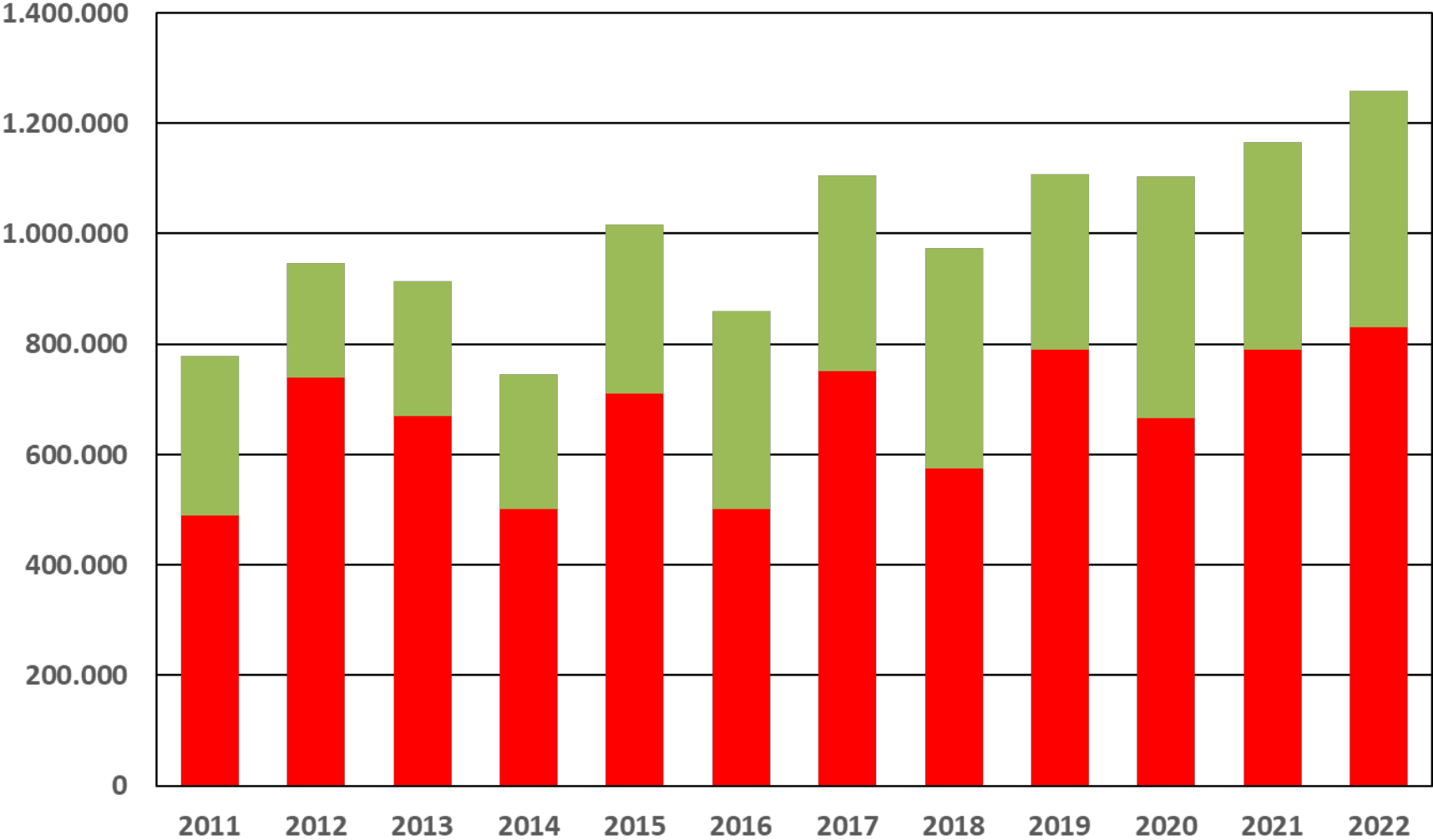
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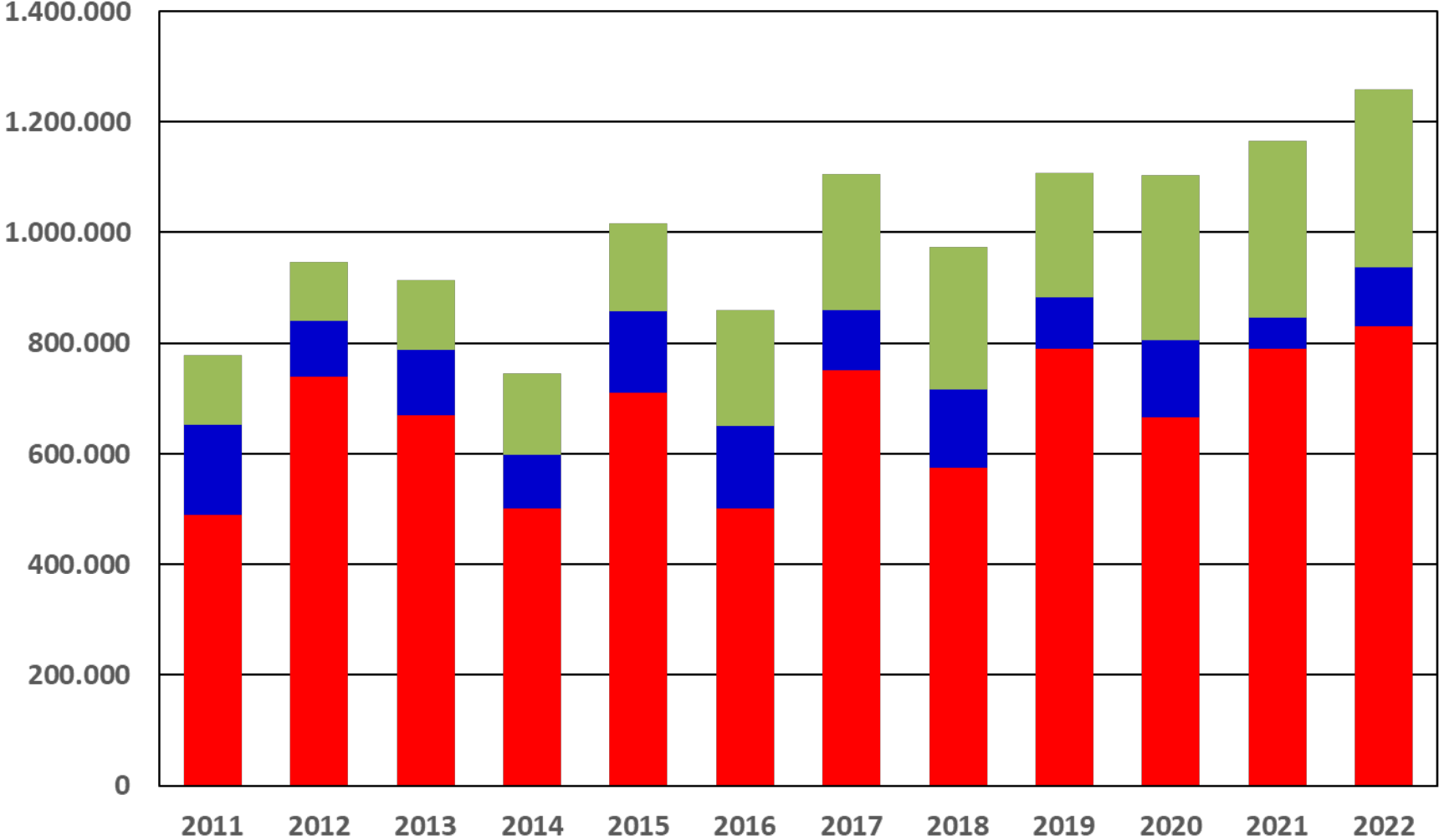
World Hazelnut Production (Metric Tons/In-shell)



World Hazelnut Production (Metric Tons/In-shell)

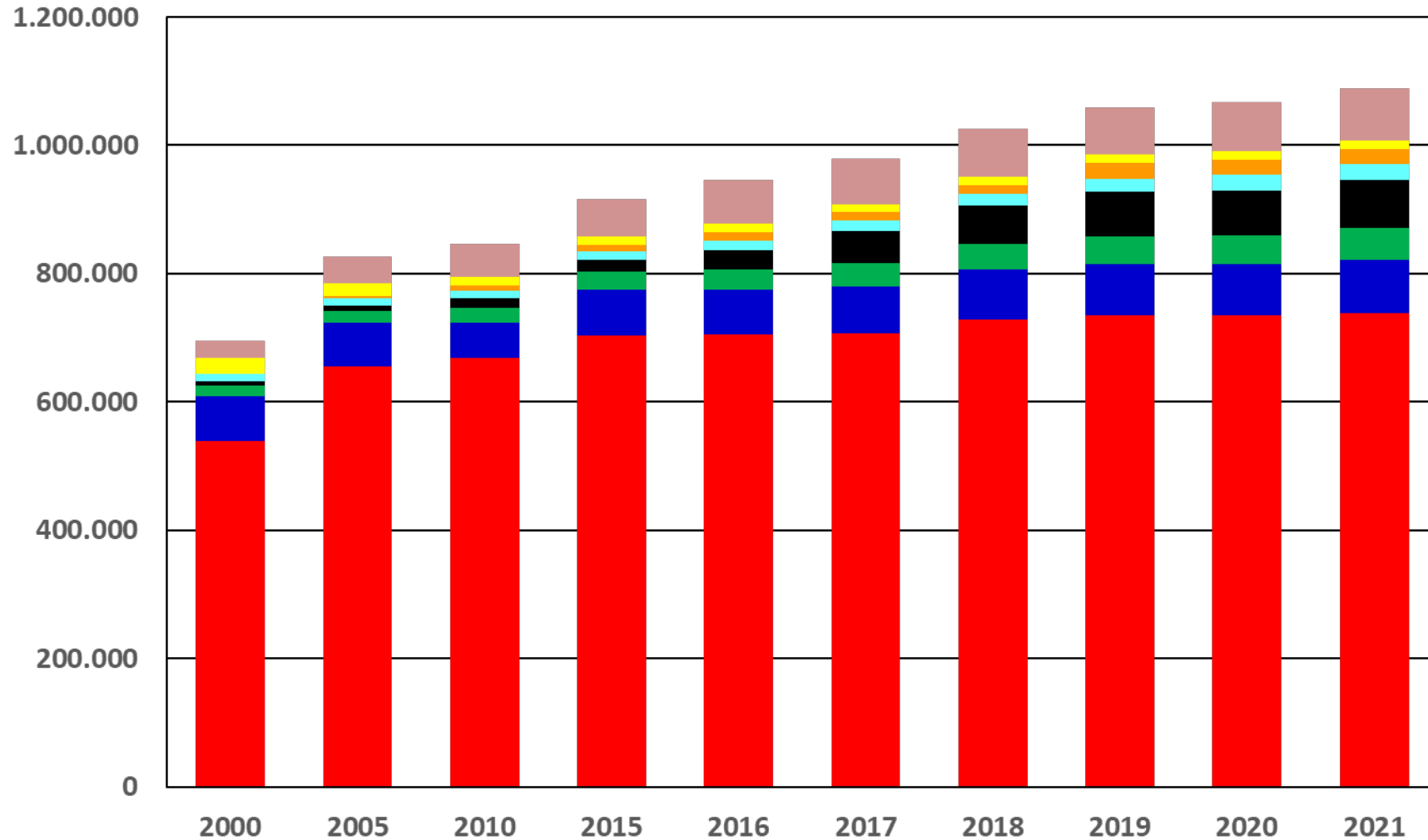


World Hazelnut Production (Metric Tons/In-shell)

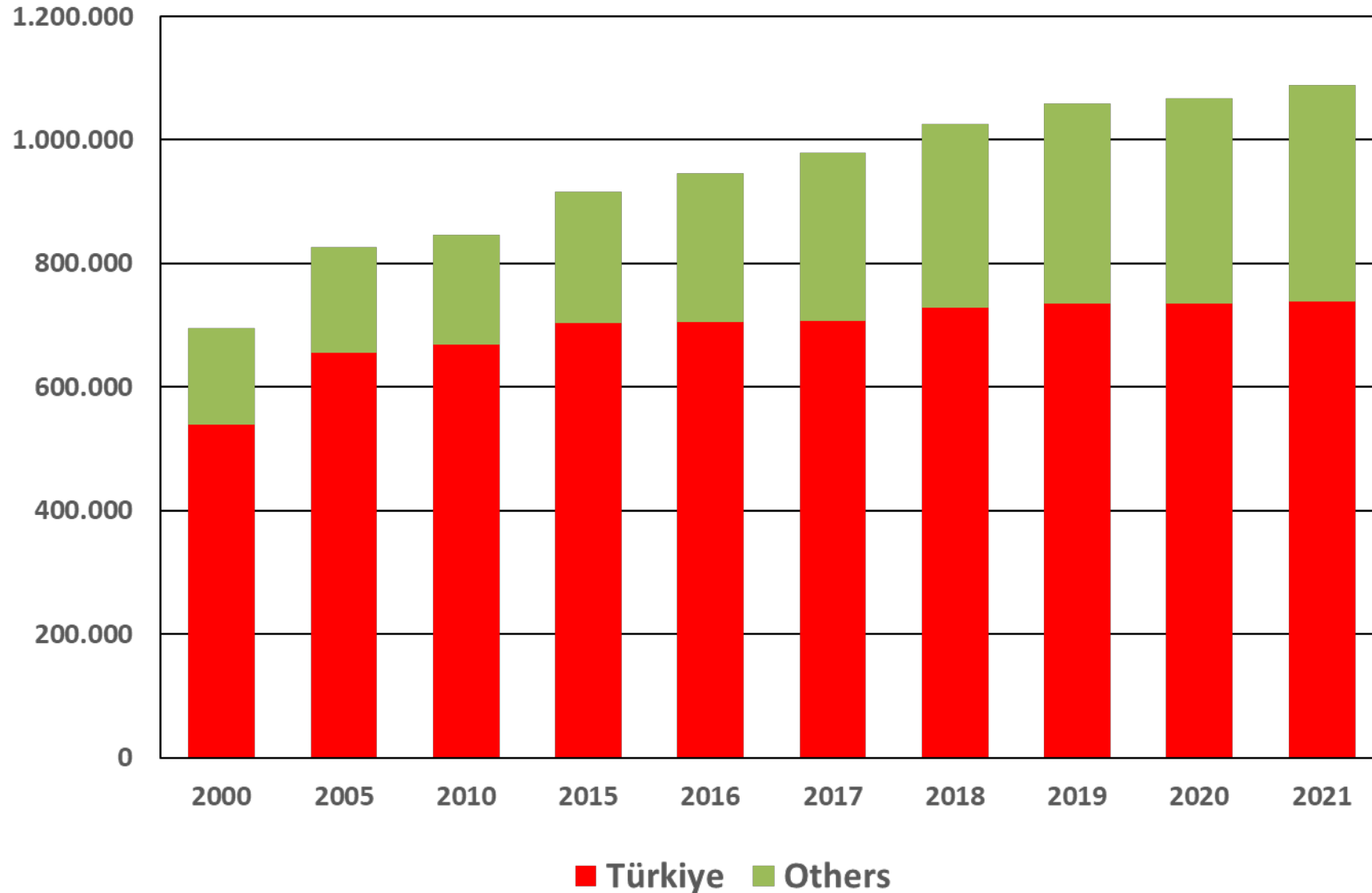


■ Türkiye ■ Italy+Spain ■ Emerging Producer Countries

World Hazelnut Acreage (Hectares)



World Hazelnut Acreage (Hectares)



World Hazelnut Acreage (Hectares)

