

EU – Turkey Cooperation scheme on hazelnuts

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French Hazelnut Production

- *Production, orchards and quality*
- *Price trend*
- *Production forecast 2025*
- *General issues*
- *Plant health issues*



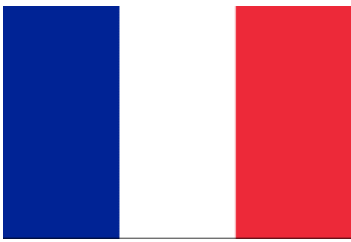
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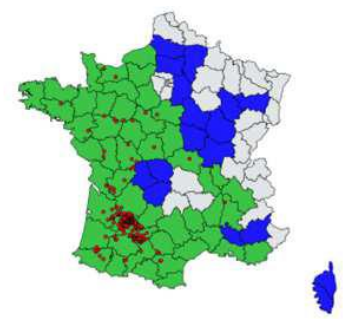


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Key figures



- **France = SMALL HAZELNUT PRODUCTION but**
 - 3rd largest producer in the EU
 - 4th largest consumer in the world
- **French hazelnut production is a very organised sector :**
 - 1 coop : SCA Unicoque 80 to 90% of the crop
 - 1 growers association : ANPN 85 to 95% of the french growers
- **11 000Ha** hazelnut orchard, 7000Ha de plus de 5 ans, 500Ha organic
- **2027-30 predicted crop : ~14 to 15 000T (Inshell)**
- **Historicaly 50% dedicated to inshell market** but recent evolution to 70% shelled for industry
- **Mix cultivars :**
 - old ones Italian and US origins,
 - french ones : Pauetet, Corabel, Segorbe
 - New ones from Oregon : Lewis, etc...

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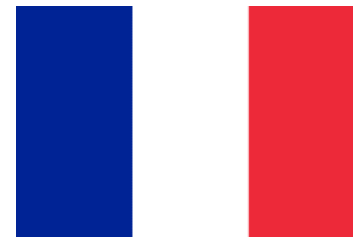
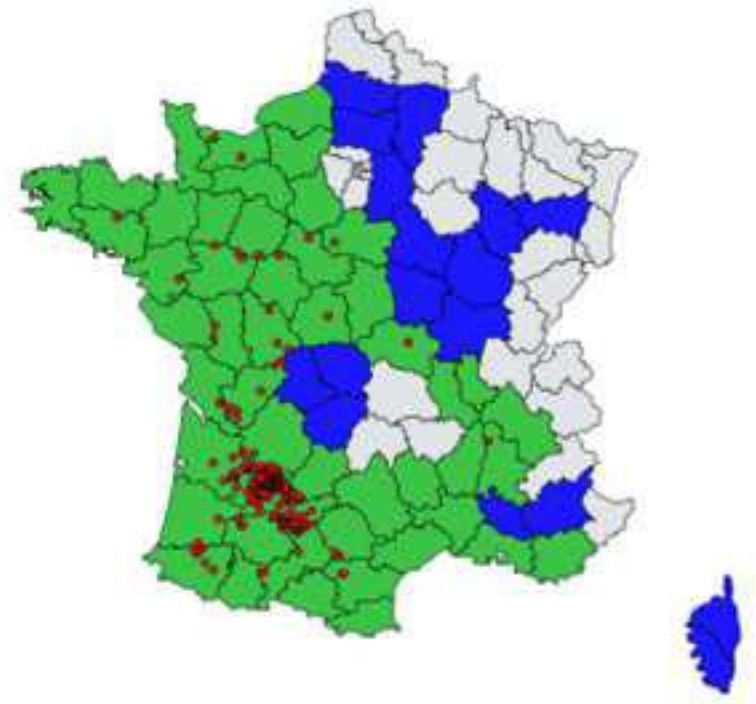


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European Commission
Agriculture and Rural Development

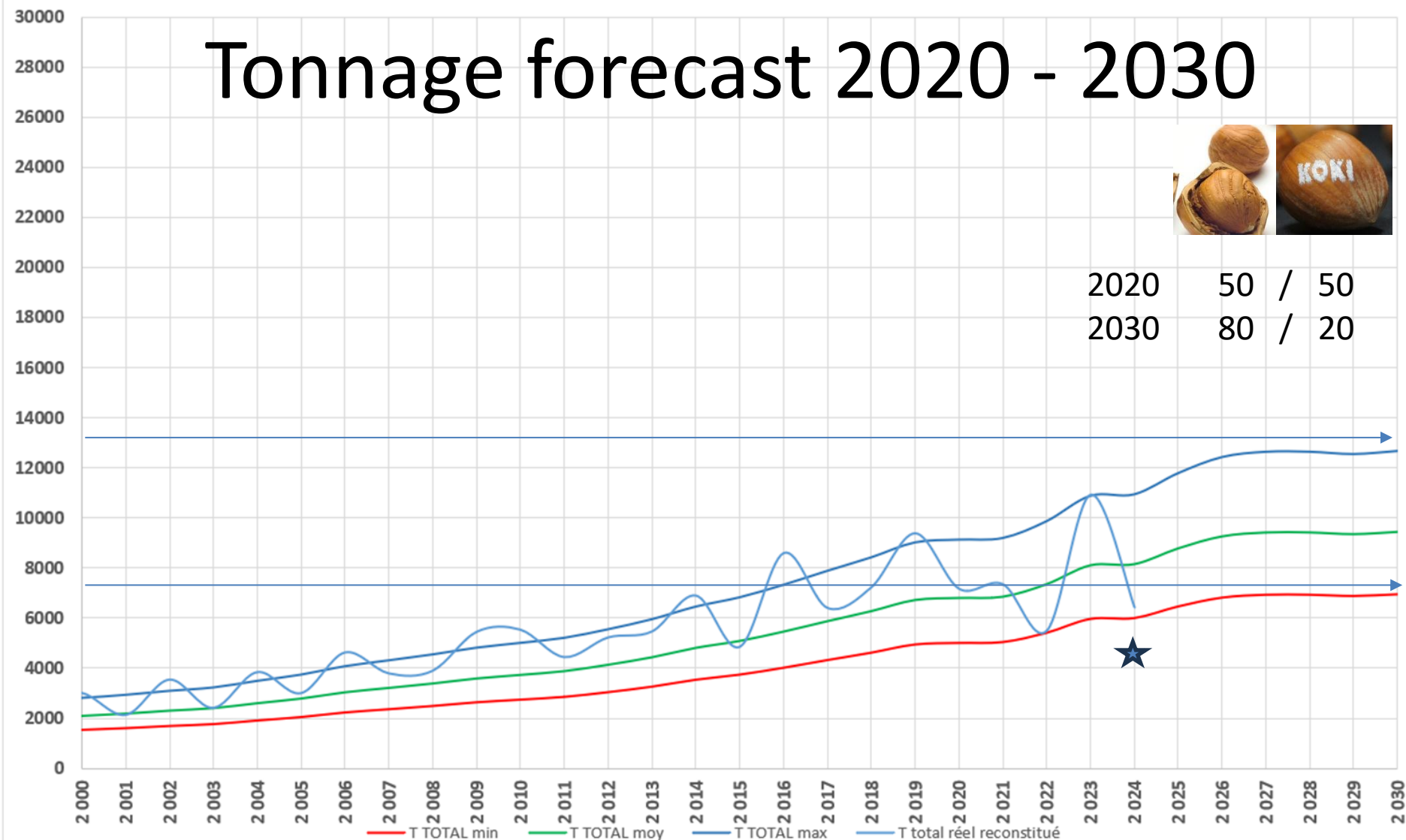
UNICOQUE : production area



Tonnage forecast 2020 - 2030



2020	50	/	50
2030	80	/	20



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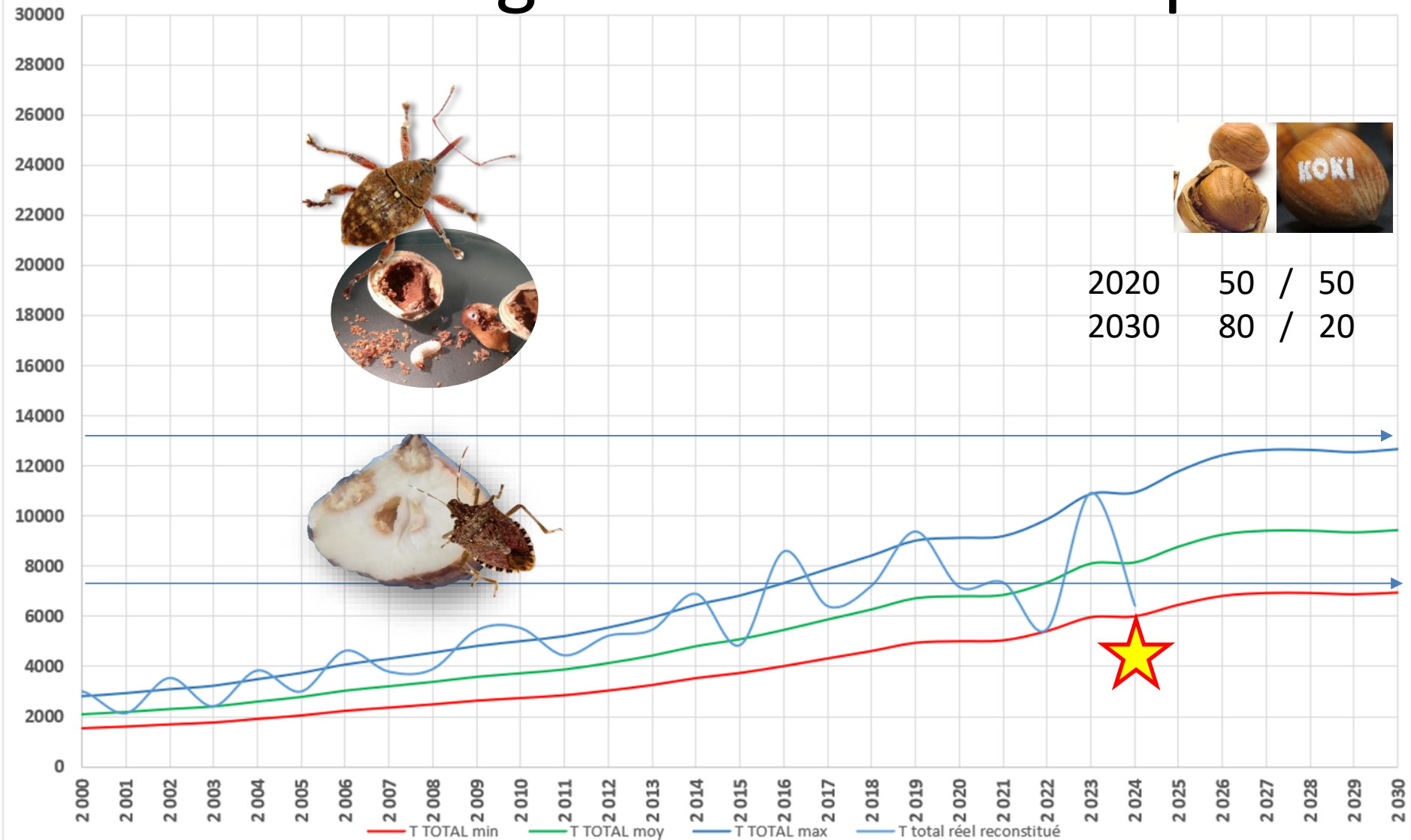
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2024 french crop :
very low yield and very high BMSB and curculio damages linked to
neonicotinoids banned



- **Very strict french regulation concerning pesticides use (no neonicotinoides) :**
- **=> BMSB damages X 3 in 2023 vs average 2015-2020 period**
- **=> BMSB damages X 7 in 2024 vs average 2015-2020 period**
 - **= 20.4% total intern defects as an average**

Tonnage 2024 french crop

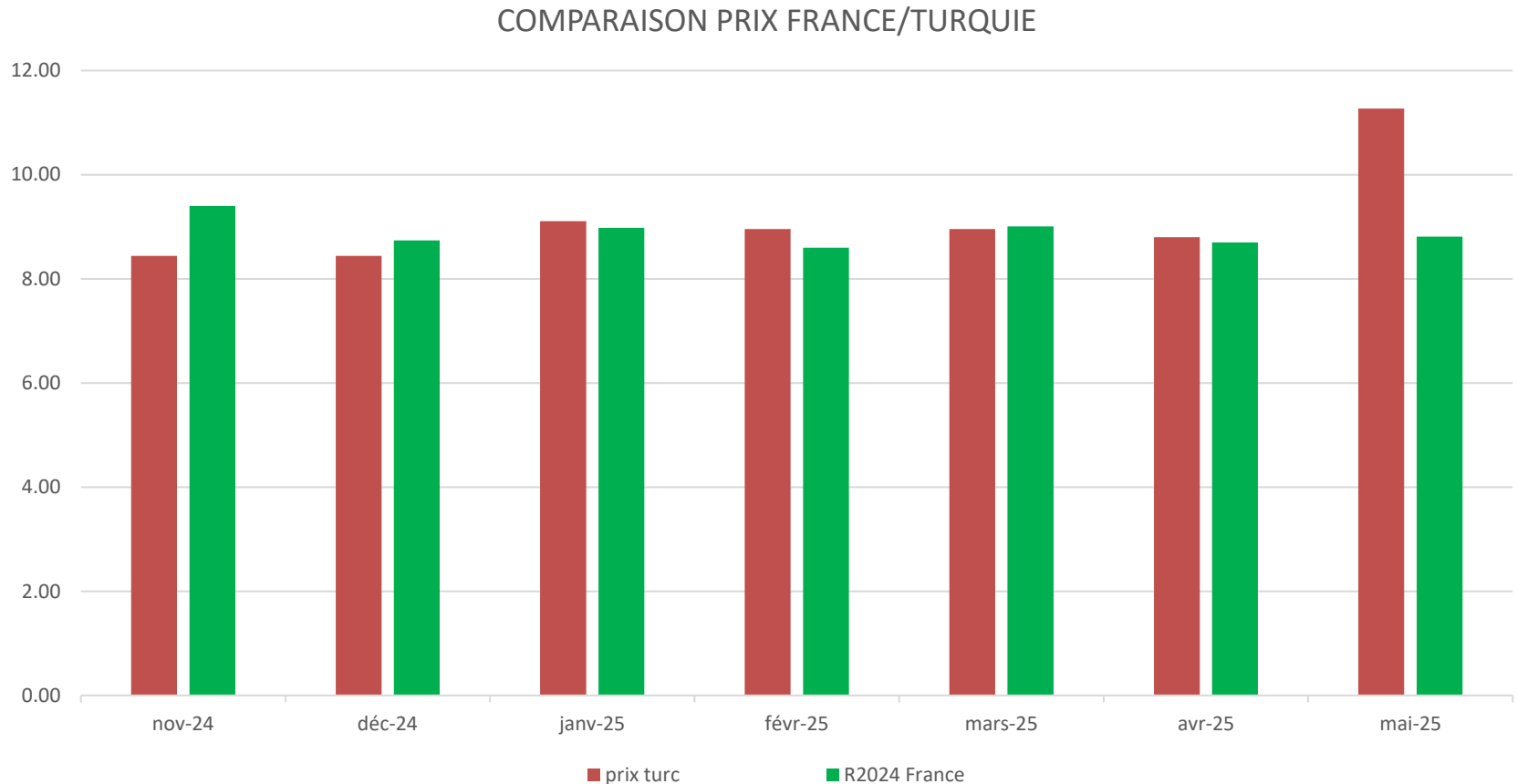


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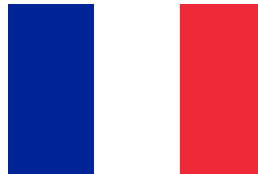


Prices trend 2024 french crop (kernel €/kg)



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Tonnage and quality 2025

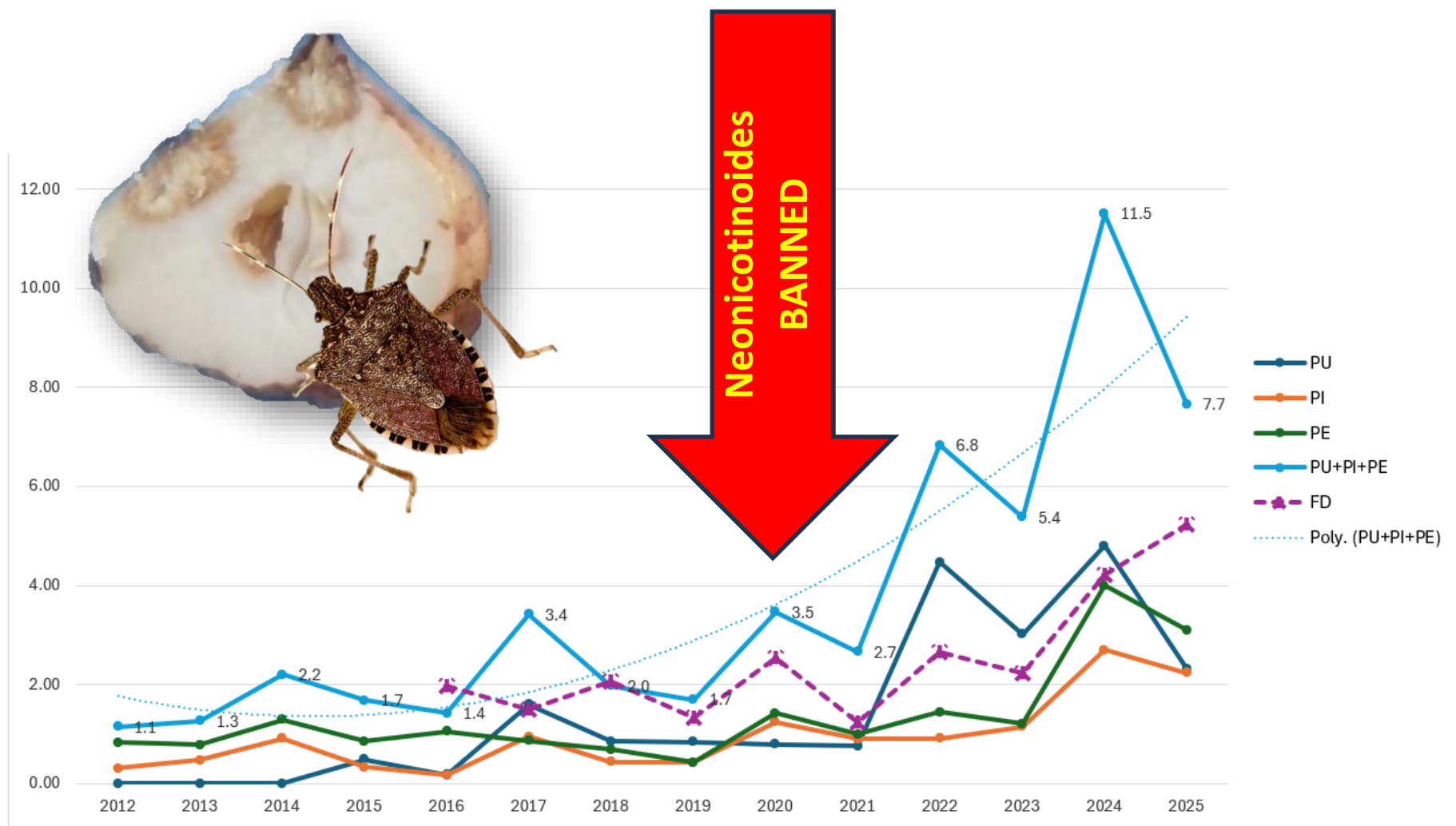
- Pests damages associated with high temperatures period affected the volume
— => Total 2024 tonnage ~ 8500T
- **Quality pests damages lower than last year**
=> *Average BMSB damages around 10%*



Main pests



BMSB damages 2012-2025



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Quality and safety

- **No aflatoxins** detected since 1999
- **No pesticides** over LMR since 1999
- **Traceability** from harvest to customer
- Very high quality standard levels and **certification**

General issues

- New pests (***Halyomorpha halys***) and new pesticides regulations = strong incidence on french production
- French prices 2025 trend : drastic increase +50% vs 2024
- Very important increase of production cost due to
 - Pesticides UE and French regulation
 - Important pest damage

General issues

- The impact of pests is severely weakening French and European hazelnut production, exacerbated by climate change and European pesticide regulations.
- Prices must rise significantly and sustainably across Europe to compensate for these difficulties.
- It is important to adopt a long-term strategic vision.
- Quality and traceability are paramount.
- Pest management is a priority, and French regulations are a global exception.

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Main items for UE growers :

- European regulations on pesticides significantly impact EU hazelnut production, both in terms of quantity and quality.
- We demand maximum transparency and traceability with Turkey regarding pest management practices and active ingredient use

A close-up photograph of two green hazelnut husks (involucres) on a branch. The husks are covered in fine hairs and have pointed, serrated edges. They are surrounded by green leaves with serrated margins. The background is a soft-focus blue sky.

THANK YOU...