



Global Hazelnut Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 8.7 bn
Forecast (2031)	USD 12.7 bn
CAGR (2021-2031)	6.4%
Study period	2021-2031
Largest region	Europe · 45.2%
Fastest-growing region	Asia-Pacific · 7.8%
Market concentration	Moderate
Licence	Individual / Company

The global hazelnut market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a XX% CAGR. Confectionery remains the principal demand engine, while premium spreads, plant-based foods and portion-controlled snacks are broadening the application base. Europe accounts for XX% of market value, supported by its concentrated chocolate and bakery industries, while Asia-Pacific is the fastest-growing demand region at a XX% CAGR. Supply diversification into Chile, the United States, Azerbaijan and Georgia is becoming strategically important as processors manage Turkish crop volatility and rising traceability requirements.

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Executive summary

The global hazelnut market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a XX% CAGR. Confectionery remains the principal demand engine, while premium spreads, plant-based foods and portion-controlled snacks are broadening the application base. Europe accounts for XX% of market value, supported by its concentrated chocolate and bakery industries, while Asia-Pacific is the fastest-growing demand region at a XX% CAGR. Supply diversification into Chile, the United States, Azerbaijan and Georgia is becoming strategically important as processors manage Turkish crop volatility and rising traceability requirements.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global hazelnut market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global 2024/25 production reached XXX metric tons on an in-shell basis, according to the International Nut and Dried Fruit Council.
- Türkiye produced XXX metric tons in-shell in 2024/25, equivalent to XX% of that season's global crop.
- The International Nut and Dried Fruit Council's March 2026 assessment placed the 2025/26 global crop at XXX metric tons in-shell, reflecting a sharp Turkish crop contraction.
- Türkiye's 2024/25 exports closed at XXX metric tons on a kernel basis, according to the Black Sea Hazelnut and Products Exporters' Association.
- Oregon utilized hazelnut production reached XXX short tons in 2024, up XX% year on year, while crop value increased XX% to USD XXX million, according to USDA NASS.
- Confectionery represented XX% of global hazelnut market value in 2025, maintaining its position as the largest application.
- Natural and processed kernels accounted for XX% of value, while paste and praline recorded the strongest industrial demand momentum among major forms.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Hazelnut Market Trends and Growth Drivers

Hazelnut economics are governed by the interaction of concentrated Black Sea supply and diversified global demand. Türkiye remains the price-setting origin, but expanding crops in Chile, Oregon and the Caucasus are changing procurement calendars and allowing large buyers to construct more resilient origin portfolios.

Demand is moving beyond whole kernels toward processed formats that solve manufacturing problems. Paste, praline, calibrated pieces and low-defect roasted kernels command higher value because they deliver consistency in flavor, viscosity, color and line performance for chocolate, bakery and spread manufacturers.

The market's competitive threshold is rising as food safety, allergen management, labor safeguards and farm-level traceability become embedded in customer approval. Suppliers that combine agronomy, testing, inventory finance and value-added processing are gaining strategic relevance relative to transactional exporters.

Growth drivers

Premium chocolate and filled-confectionery expansion

Chocolate manufacturers are increasing hazelnut use in pralines, filled bars, wafers and premium gifting formats because the ingredient supports both sensory differentiation and premium pricing. The effect is strongest among vertically integrated confectioners and specialist ingredient processors that can maintain roast profile, particle size and year-round consistency.

Growth of spreads and bakery fillings

Chocolate-hazelnut spreads, croissant fillings, pastry creams and foodservice toppings are increasing demand for paste, praline and finely milled kernels. Industrial bakeries favor application-ready ingredients that shorten production cycles and reduce variation, shifting value toward processors with roasting, blending and aseptic packing capabilities.

Plant-based nutrition and healthy snacking

Hazelnuts benefit from consumer interest in plant protein, unsaturated fats and recognizable ingredients. Snack brands, dairy-alternative formulators and nutrition-bar producers are introducing roasted kernels, hazelnut beverages, butter and flour into higher-value portfolios.

Chile and US orchard maturation

Maturing orchards in Chile and Oregon are expanding commercially reliable supply outside the Black Sea region. Their mechanized production systems, counter-seasonal harvest timing and growing processing infrastructure improve procurement flexibility for multinational buyers.

Value-added processing investment

New capacity in cracking, optical sorting, roasting and paste production raises usable yield and enables suppliers to serve demanding confectionery specifications. Greater availability of calibrated kernels and low-defect industrial ingredients supports penetration beyond commodity trading.

Premium food demand in Asia-Pacific

Urban consumers and expanding bakery, café and gifting channels are increasing purchases of hazelnut-flavored chocolate and desserts. International brands are widening distribution while regional manufacturers adopt hazelnut to position products above mass-market peanut and compound-chocolate offerings.

Restraints

Turkish crop and price volatility

Türkiye remains the pivotal origin for global pricing, so frost, drought, yield variation and inventory withholding transmit rapidly into kernel and paste costs. Buyers respond through coverage contracts and reformulation, but sharp price cycles still compress margins for processors and finished-goods manufacturers.

Climate and biological production risk

Spring frost, summer heat, irregular rainfall, brown marmorated stink bug and fungal pressure can reduce yield, caliber and kernel recovery. Climate variability also increases insurance, irrigation, crop-protection and sorting expenditure across both established and emerging origins.

Food-safety and allergen compliance burden

Aflatoxin limits, pesticide maximum residue levels and mandatory tree-nut allergen declarations require rigorous segregation, testing and documentation. Rejected lots and additional sorting disproportionately affect smaller exporters without integrated laboratories and modern storage.

Slow orchard response and labor constraints

Hazelnut orchards require several years to reach commercial production, preventing supply from responding quickly to price signals. Seasonal labor availability remains a constraint in Türkiye and Italy, while mechanization requires orchard redesign and additional capital.

Driver and Restraint Impact on the Hazelnut Market

Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium chocolate and filled-confectionery expansion	XXX	XXX	XXX
Growth of spreads and bakery fillings	XXX	XXX	XXX
Plant-based nutrition and healthy snacking	XXX	XXX	XXX
Chile and US orchard maturation	XXX	XXX	XXX
Value-added processing investment	XXX	XXX	XXX
Premium food demand in Asia-Pacific	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Turkish crop and price volatility	XXX	XXX	XXX
Climate and biological production risk	XXX	XXX	XXX
Food-safety and allergen compliance burden	XXX	XXX	XXX
Slow orchard response and labor constraints	XXX	XXX	XXX

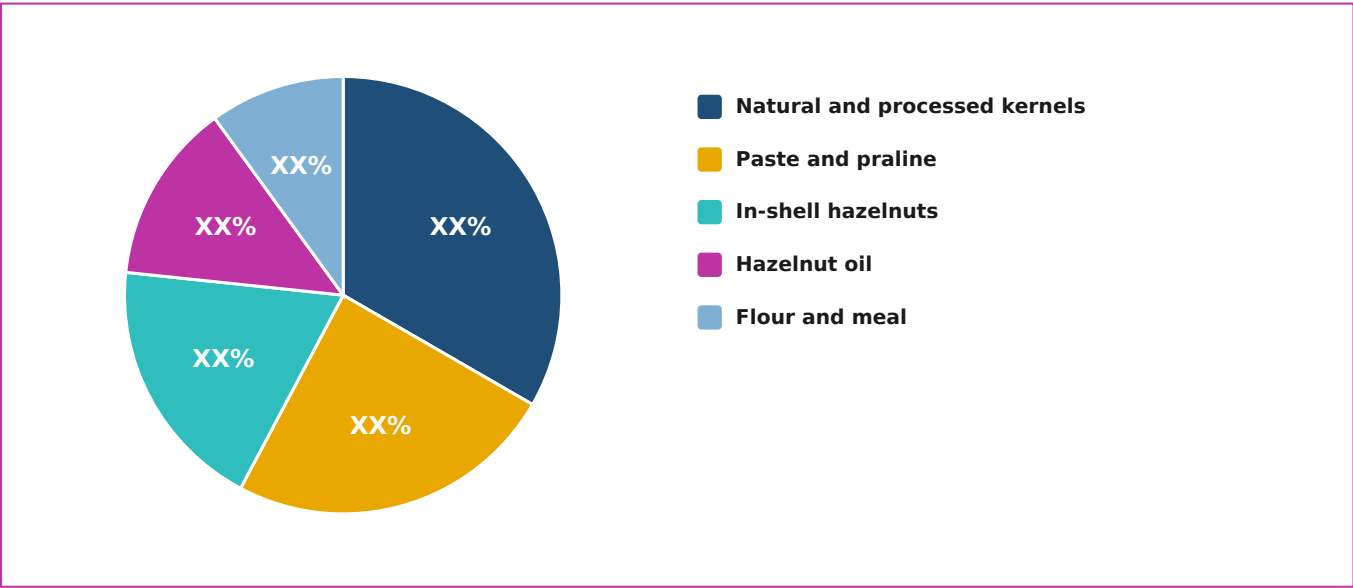
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Hazelnut Market Segmentation by Form, Application, Nature and Channel

By Form

Kernels dominate because they serve confectionery, bakery, snack and retail uses with limited additional formulation. Paste and praline are gaining value share as industrial customers outsource roasting, grinding and recipe standardization to specialist processors. Flour and meal benefit from gluten-free baking, while hazelnut oil remains a premium culinary niche constrained by extraction yield and price.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Natural and processed kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paste and praline	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
In-shell hazelnuts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hazelnut oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flour and meal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

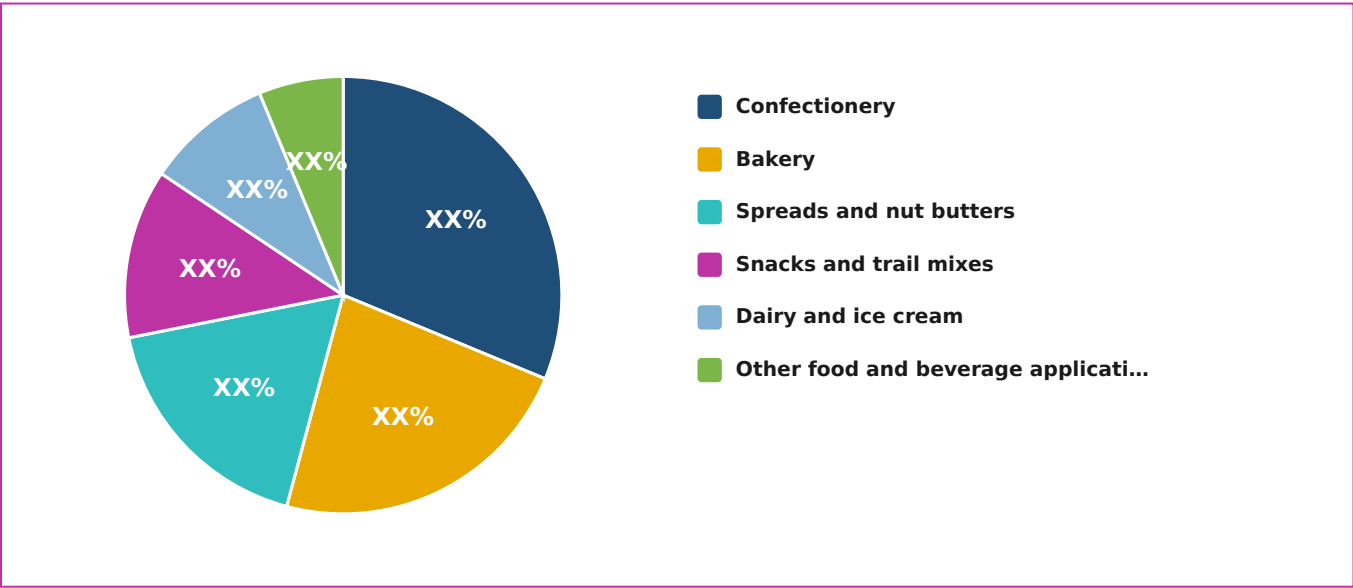
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By Application

Confectionery remains the anchor application through chocolate bars, pralines, wafers and boxed assortments, with manufacturers valuing hazelnut's established flavor pairing and premium positioning.

Bakery and spreads provide a broad industrial demand base, while snack formats benefit from clean-label and nutrition positioning. Dairy, ice cream and plant-based formulations are increasing their use of paste, pieces and flavor systems, particularly in North America and Asia-Pacific.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Spreads and nut butters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Snacks and trail mixes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy and ice cream	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other food and beverage applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional supply dominates because industrial confectionery requires large, consistent volumes at commercially viable prices. Organic hazelnuts command premiums in natural retail, specialty chocolate and plant-based products, but certification integrity, segregation and limited multi-origin availability constrain scale. Growth will be strongest among processors able to provide certified chain-of-custody and residue documentation.

Value by nature, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct and distributor-mediated business-to-business supply dominates because confectionery, bakery and spread manufacturers purchase kernels and semi-finished ingredients in bulk under technical specifications. Retail sales are smaller but grow through premium snacking, baking ingredients and e-commerce. Supplier consolidation and contract coverage remain more pronounced in B2B channels, while retail captures higher unit margins and stronger origin branding.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and e-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

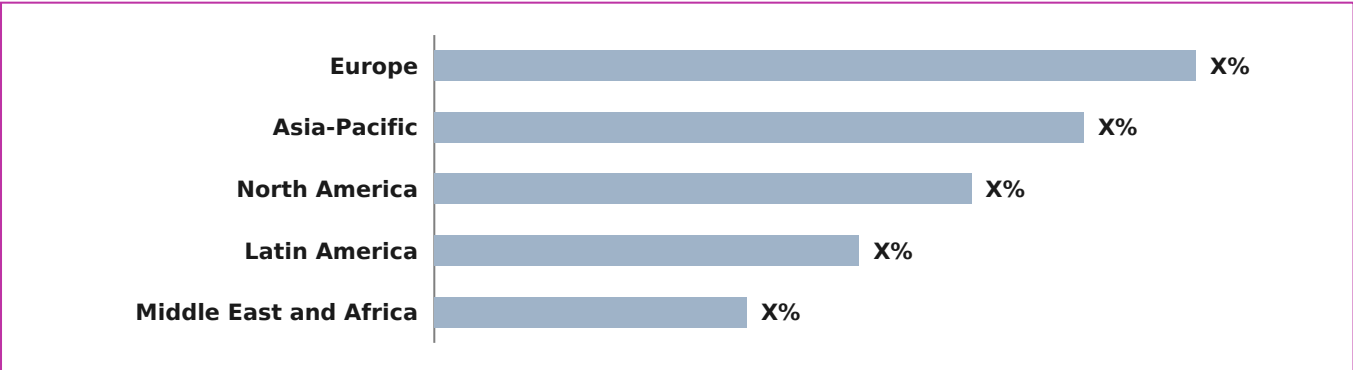
Hazelnut Market Regional Analysis and Country Outlook

Europe remains the commercial center of the hazelnut value chain, accounting for XX% of 2025 market value. Italy, Germany, France, Switzerland and Belgium combine large confectionery and bakery industries with established importing, roasting and paste-processing capacity. Türkiye anchors regional supply and export pricing, while Italy's protected-origin varieties and specialized processors command premiums in praline, gelato and artisanal chocolate applications.

Asia-Pacific will post the fastest regional CAGR of XX% through 2031. China leads regional consumption growth through premium chocolate, bakery chains and imported snack formats, while Japan and South Korea sustain high specification requirements and attractive unit values. India and Southeast Asia provide the next demand layer as modern retail, café culture and affordable premium confectionery broaden the consumer base.

North America combines expanding consumption with a stronger domestic supply platform in Oregon, where utilized production reached XXX short tons in 2024. Latin America's smaller demand base is offset by Chile's rapid production and processing expansion, making the region increasingly important to global trade. Azerbaijan and Georgia strengthen the wider European and West Asian supply corridor, although quality consistency and processing depth vary by origin.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Hazelnut Market Competitive Landscape and Company Share

The market has moderate concentration: orchard ownership is highly fragmented, but export processing, industrial ingredient supply and procurement for multinational confectionery customers are concentrated among a limited group. Ferrero Hazelnut Company has the broadest vertically coordinated footprint, while Balsu, ofi, Durak Fındık, Arslantürk, Gürsoy and Poyraz are significant Turkish processors and exporters. Oregon and Chilean suppliers add origin diversification and counter-seasonal coverage.

Competition is shifting from raw-kernel availability toward verified origin, defect control, calibrated roasting and application-specific processing. Large buyers increasingly require farm mapping, labor safeguards, residue monitoring, supplier codes and lot-level traceability. These requirements favor processors with field teams, laboratories, optical sorters, segregated storage and sufficient working capital to hold inventory.

Capacity investment is accelerating outside Türkiye. Ferrero opened a XXX-metric-ton in-shell processing plant in Chile in 2024 and subsequently announced further Chilean logistics and processing investment, while Oregon acreage and output continue to expand. Strategic advantage through 2031 will depend on multi-origin procurement, direct grower relationships and the ability to convert kernels into paste, praline, meal and precisely sized inclusions.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ferrero Hazelnut Company	XXX	XXX	XXX	XXX
Balsu Gıda	XXX	XXX	XXX	XXX
ofi	XXX	XXX	XXX	XXX
Durak Fındık	XXX	XXX	XXX	XXX
Arslantürk Tarım Ürünleri	XXX	XXX	XXX	XXX
Gürsoy Tarımsal Ürünler	XXX	XXX	XXX	XXX
Poyraz Fındık	XXX	XXX	XXX	XXX
Hazelnut Growers of Oregon	XXX	XXX	XXX	XXX
Northwest Hazelnut Company	XXX	XXX	XXX	XXX
Kanegrade	XXX	XXX	XXX	XXX

Source: XXX

Global Hazelnut Market Forecast and Investment Opportunities

The global market will expand from USD XXX billion in 2025 to USD XXX billion in 2031. Value growth will reflect rising processed-ingredient demand, premiumization and structurally higher compliance costs, while annual volume growth will remain exposed to alternate-bearing cycles and weather shocks. Paste, praline and calibrated roasted kernels will capture a larger share of incremental revenue than undifferentiated in-shell product.

The central forecast assumes progressive recovery from the constrained 2025/26 supply season, continued orchard maturation in Chile and the United States, and sustained confectionery demand in Europe and Asia-Pacific. An upside scenario emerges if Chilean output scales faster and premium chocolate penetration accelerates in China and India; a downside scenario centers on consecutive Black Sea crop losses, demand reformulation and prolonged price inflation.

Winning suppliers will combine agronomic support, diversified origin coverage, physical and digital traceability, food-safety performance and tailored processing. Buyers will reward suppliers that can guarantee usable kernel yield and functional performance rather than compete solely on nominal price per tonne. Investment priorities will therefore center on orchards, irrigation, optical sorting, laboratory capacity, low-oxygen storage and paste or praline conversion.

Opportunities

- Counter-seasonal sourcing and processing investment in Chile
- Premium single-origin, organic and fully traceable hazelnuts
- Hazelnut ingredients for plant-based dairy, beverages and protein snacks
- Low-defect paste and praline tailored to industrial chocolate specifications
- Digital crop monitoring, optical sorting and farm-to-factory traceability
- Higher-value utilization of shells and processing by-products

This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.