



Global Pine Nut Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

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 1.5 bn
Forecast (2031)	USD 2.1 bn
CAGR (2021-2031)	5.9%
Study period	2021-2031
Largest region	Asia-Pacific · 46.8%
Fastest-growing region	Middle East & Africa · 7.2%
Market concentration	Low
Licence	Individual / Company

The global pine nut market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific held XX% of market value, supported by China's dominant processing and consumption position and expanding premium demand for Himalayan chilgoza. Food manufacturing remained the largest application, while retail and e-commerce generated the strongest route-to-market growth. Supply volatility, species-specific price premiums and origin traceability will determine margin performance through 2031.

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Executive summary

The global pine nut market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific held XX% of market value, supported by China's dominant processing and consumption position and expanding premium demand for Himalayan chilgoza. Food manufacturing remained the largest application, while retail and e-commerce generated the strongest route-to-market growth. Supply volatility, species-specific price premiums and origin traceability will determine margin performance through 2031.

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

Key findings

- The global pine nut market generated USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031.
- Global pine nut consumption totaled XXX metric tons on a kernel-equivalent basis in 2023, according to the International Nut and Dried Fruit Council.
- China consumed XXX metric tons in 2023, equal to XX% of reported global kernel-equivalent consumption.
- The United States consumed XXX metric tons and Italy consumed XXX metric tons in 2023, placing them second and third among national consuming markets.
- Asia-Pacific accounted for XX% of 2025 market value, reflecting China's scale in harvesting, processing, trade and premium gifting.
- Korean and Siberian pine species represented XX% of market value, while chilgoza recorded the fastest species CAGR at XX%.
- Food manufacturing captured XX% of market value; direct retail and household consumption represented a further XX%.
- China imported 981.64 metric tons of Pakistani pine nuts worth USD XXX million in 2024, according to the General Administration of Customs of China.

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 Pine Nut Market Trends and Growth Drivers

Pine nuts occupy an unusual position between a forest product, a premium culinary ingredient and a seasonal gifting item. Demand is globally diversified, but supply remains concentrated in a limited number of *Pinus* species and mountain or forest ecosystems, making biological harvest cycles more influential than conventional planted-acreage economics.

Value formation begins with species and origin. Mediterranean stone pine and large-kernel chilgoza command premiums based on flavor, appearance and provenance, while Korean and Siberian pine provide the bulk of internationally traded kernels. Shelling recovery, kernel integrity, moisture, freshness and destination testing then determine the final commercial grade.

The market's structural challenge is not underlying consumer appeal but converting variable harvests into consistent, documented supply. Multi-origin procurement, harvest finance, cold storage and oxygen-controlled packaging therefore create more durable advantage than scale in consumer branding alone.

Growth drivers

Premium gourmet nut demand

Consumers and chefs continue to pay a premium for pine nuts' buttery flavor, soft texture and culinary authenticity. The effect is strongest in pesto, bakery, salads and premium snack assortments, allowing branded suppliers to preserve value growth even when volumes fluctuate.

Asian premium gifting

Pine nuts occupy a high-value position in Chinese festive gifting and increasingly in urban snack assortments. E-commerce promotion and improved China-Pakistan trade links are widening access to large chilgoza kernels and reinforcing origin-led price tiers.

Mediterranean food penetration

International consumption of pesto, bakery inclusions and Mediterranean-style prepared foods is expanding pine-nut usage beyond Southern Europe. Manufacturers favor kernels for their recognizable ingredient declaration and distinctive sensory profile.

Plant-based nutrition positioning

Pine nuts combine unsaturated fats, protein and micronutrients with a minimally processed image. Premium snack, sauce and dairy-alternative developers are using the ingredient to support natural and plant-forward positioning.

Specialty e-commerce expansion

Online channels reduce the shelf-space disadvantage faced by a small-volume premium nut and make species, origin and harvest information visible to consumers. Direct fulfillment also supports smaller packs, gifting formats and subscription purchasing.

Supply-chain formalization

Investment in optical sorting, food-safety controls, vacuum packing and direct procurement is raising exportable yields and reducing quality dispersion. Suppliers that standardize kernel size, moisture and defect tolerances can access higher-value industrial accounts.

Restraints

Mast-cycle supply volatility

Pine species produce highly variable crops, and the long biological cycle prevents rapid acreage or yield responses to price. Alternating harvests translate directly into inventory swings, sharp procurement-price movements and formulation risk for industrial users.

Premium price versus substitutes

Pine nuts trade at a multiple of sunflower seeds, cashews and several other recipe substitutes. When food manufacturers face margin pressure, reformulation and reduced inclusion rates constrain volume growth outside authenticity-critical applications.

Wild-harvest fragmentation

A large share of supply originates in dispersed forests and mountainous communities, creating variable lot documentation and costly aggregation. Limited mechanization and labor availability restrict scalability for chilgoza and several Mediterranean origins.

Quality and compliance losses

High oil content makes shelled kernels vulnerable to oxidation, while poor drying or storage raises mold and contaminant risk. Rejections, testing expense and shortened shelf life reduce commercial recovery from already scarce crops.

Pine Nut Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium gourmet nut demand	XXX	XXX	XXX
Asian premium gifting	XXX	XXX	XXX
Mediterranean food penetration	XXX	XXX	XXX
Plant-based nutrition positioning	XXX	XXX	XXX
Specialty e-commerce expansion	XXX	XXX	XXX
Supply-chain formalization	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Mast-cycle supply volatility	XXX	XXX	XXX
Premium price versus substitutes	XXX	XXX	XXX
Wild-harvest fragmentation	XXX	XXX	XXX
Quality and compliance losses	XXX	XXX	XXX

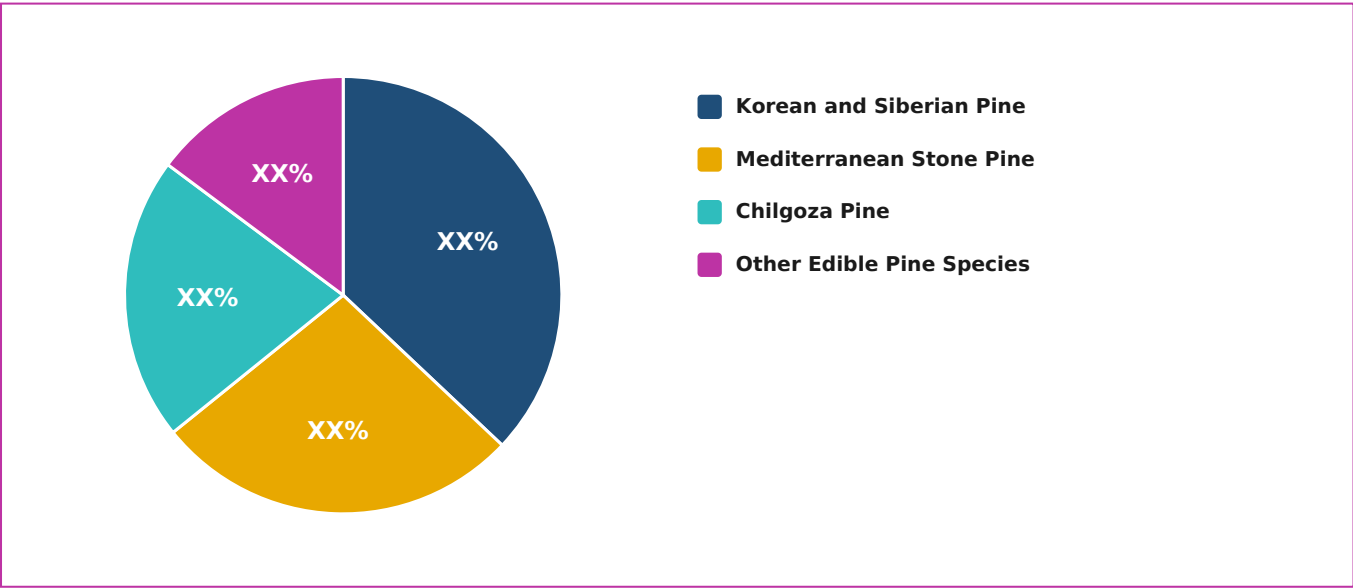
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Pine Nut Market Segmentation by Species, Form, Application and Channel

By Species Group

Korean and Siberian species dominate international kernel availability through Northeast Asian and Russian supply chains. Mediterranean stone pine realizes the highest consistent unit prices in European culinary applications, while chilgoza is gaining value through large kernels, premium gifting and improving China-bound trade. Other species remain locally important but commercially fragmented.

Value share by species Group, 2025



Source: XXX

Value by species Group, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Korean and Siberian Pine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mediterranean Stone Pine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chilgoza Pine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Edible Pine Species	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Shelled kernels lead the market but require rapid packing and controlled storage because exposed oils oxidize readily. In-shell products retain a strong place in Asian gifting and traditional snacking, while roasted, chopped and paste formats gain from convenience and differentiated flavor. Pine nut oil remains a

narrow food segment with premium culinary positioning.

Value by form, USD bn

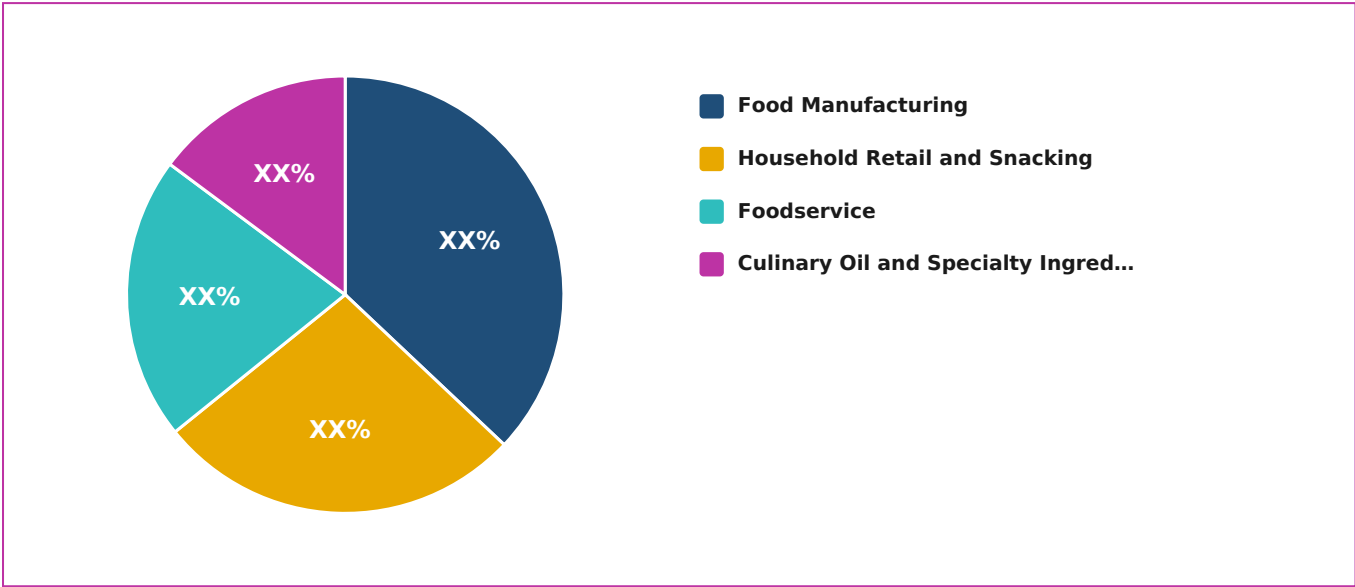
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Shelled Whole Kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
In-shell Pine Nuts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted, Chopped and Paste Formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food-grade Pine Nut Oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Manufacturing demand is anchored by pesto, bakery, confectionery, sauces and prepared meals, where flavor and ingredient authenticity justify the price. Household retail is expanding through resealable packs and online specialty stores. Foodservice growth is strongest in premium Italian, Mediterranean and contemporary health-led menus.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food Manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Household Retail and Snacking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Culinary Oil and Specialty Ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Industrial distributors lead by consolidating harvest lots, financing inventory and meeting manufacturer specifications. Modern retail provides scale for branded and private-label packs, whereas specialist stores sustain origin-led premium products. E-commerce is the fastest-growing channel because it accommodates detailed provenance, broader pack choices and cross-border gifting.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
B2B Ingredient Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and Traditional Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce and Direct-to-Consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Certification and Positioning

Conventional product dominates because wild-collection certification is costly and chain-of-custody documentation varies by origin. Organic and sustainability-verified products are expanding in North American and European natural channels. Geographic and single-origin claims command value when backed by lot-level traceability and species verification.

Value by certification and Positioning, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Verified Origin or Sustainability Claims	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

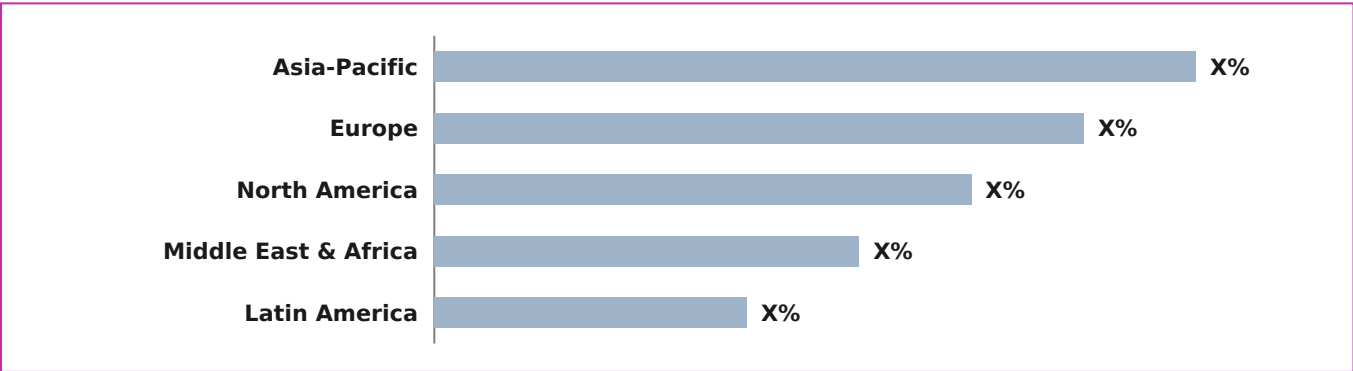
Pine Nut Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of 2025 value and remains the market's operating center. China combines substantial Korean and Yunnan pine resources with industrial shelling, grading and export infrastructure, while domestic festive demand absorbs a growing share of premium output. Pakistan and Afghanistan occupy a smaller but higher-priced position through chilgoza, whose elongated kernels command strong demand in China and Gulf markets.

Europe accounted for XX% of value, led by Italy, Germany and Spain. Italy anchors pesto and foodservice demand, Germany is a major packaged-food and specialty retail market, and Spain, Portugal and Türkiye preserve the premium Mediterranean stone-pine segment despite pest damage and uneven harvests. European buyers place a higher commercial premium on Pinus pinea provenance, food-safety documentation and oxidation control.

Middle East & Africa will record the fastest regional CAGR at XX% through 2031. Gulf premium retail, traditional nut consumption and improving commercialization of Afghan and Pakistani chilgoza support the expansion, while Türkiye connects Mediterranean production with European and regional buyers. North American growth is steadier, centered on pesto, natural retail, warehouse clubs and specialty e-commerce.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

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

Pine Nut Market Competitive Landscape and Company Share

The pine nut market is fragmented, with the five largest commercial suppliers controlling an estimated XX% of global value in 2025. Scale is concentrated in procurement, shelling, sorting and international distribution rather than plantation ownership because much of the crop remains wild-harvested or collected through local aggregators. Chinese processors dominate commodity Korean-pine flows, while European distributors and branded nut businesses control higher-margin customer access.

Competition turns on origin access, harvest financing, kernel recovery, contaminant control and the ability to hold inventory across mast cycles. Borges, Besana, Voicevale, Catz International, John B. Sanfilippo & Son and specialist regional importers compete through certified facilities, private-label capability and diversified nut portfolios; Pinoli and Goods From The Woods emphasize controlled provenance and differentiated local species.

Consolidation is more visible among global nut distributors than among pine-nut harvesters. Strategic investment is moving toward optical sorting, vacuum or modified-atmosphere packaging, cold storage and direct community procurement. Winning suppliers will combine multi-origin resilience with species-authentic premium lines rather than compete solely on spot-market kernel prices.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Borges Agricultural & Industrial Nuts	XXX	XXX	XXX	XXX
Besana Group	XXX	XXX	XXX	XXX
John B. Sanfilippo & Son, Inc.	XXX	XXX	XXX	XXX
Voicevale Ltd.	XXX	XXX	XXX	XXX
Catz International B.V.	XXX	XXX	XXX	XXX
RM Curtis & Co. Ltd.	XXX	XXX	XXX	XXX
HBS Foods Ltd.	XXX	XXX	XXX	XXX
Tradin Organic Agriculture B.V.	XXX	XXX	XXX	XXX
Pinoli Premium Pine Nuts	XXX	XXX	XXX	XXX
Goods From The Woods	XXX	XXX	XXX	XXX
Badia Spices, Inc.	XXX	XXX	XXX	XXX
Setton International Foods, Inc.	XXX	XXX	XXX	XXX

Source: XXX

Pine Nut Market Forecast, Scenarios and Opportunities

Market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031. The central forecast assumes normalized multi-year crop availability, sustained premium pricing and continued penetration in sauces, bakery and direct retail; annual performance will remain uneven because biological harvest cycles create pronounced inventory corrections.

The upside scenario is driven by stronger Chinese gifting demand, rapid Gulf premiumization and improved exportable recovery from Himalayan supply chains. The downside scenario centers on industrial reformulation during price spikes, trade disruption and consecutive weak crops. Across scenarios, value growth remains more resilient than physical-volume growth because species scarcity supports price realization.

Commercial advantage will accrue to suppliers that prove origin, manage oxidation from shelling to delivery and offer calibrated formats for industrial and consumer customers. Mediterranean provenance, large-kernel chilgoza, organic certification and transparent community sourcing will form the market's highest-value opportunity set through 2031.

Opportunities

- Traceable single-origin Mediterranean and Himalayan products
- Value-added roasted, portioned, paste and ingredient formats
- Mechanized orchards and managed plantations outside traditional origins
- Direct-to-consumer subscriptions and premium gifting
- Long-term sourcing partnerships with forest-dependent communities
- Upcycled shell ingredients and low-waste processing

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