



Global Chestnut 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 4.2 bn
Forecast (2031)	USD 5.8 bn
CAGR (2021-2031)	5.6%
Study period	2021-2031
Largest region	Asia-Pacific · 71%
Fastest-growing region	North America · 8.1%
Market concentration	Low
Licence	Individual / Company

The global chestnut market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031, expanding at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by China's XXX-tonne crop and deep household penetration across East Asia. Growth is shifting toward peeled, roasted, frozen, puréed and flour-based products that reduce preparation time and extend availability beyond the autumn harvest. Premium European marrons, gluten-free ingredients and new commercial orchards in North America and Australia create the market's strongest value-accretion opportunities.

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Executive summary

The global chestnut market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031, expanding at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by China's XXX-tonne crop and deep household penetration across East Asia. Growth is shifting toward peeled, roasted, frozen, puréed and flour-based products that reduce preparation time and extend availability beyond the autumn harvest. Premium European marrons, gluten-free ingredients and new commercial orchards in North America and Australia create the market's strongest value-accretion opportunities.

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

Key findings

- The global chestnut market reached USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031.
- China produced XXX tonnes of chestnuts in 2024, confirming its position as the pivotal production and consumption base.
- Asia-Pacific represented XX% of global market value in 2025, while Europe held XX%.
- Fresh in-shell and fresh peeled chestnuts generated XX% of 2025 market value, but chestnut flour will grow fastest at a XX% CAGR.
- Italy exported USD XXX million and XXX tonnes of fresh or dried chestnuts in 2024.
- China exported USD XXX million and XXX tonnes of fresh or dried chestnuts in 2024.
- Italy was the largest reported national importer in 2024 at USD XXX million and XXX tonnes.
- USDA's 2022 Census of Agriculture recorded XXX US farms with chestnuts across XXX acres.

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 Chestnut Market Trends and Growth Drivers

Chestnuts occupy a distinctive position between fresh produce, tree nuts and starch ingredients. Their high moisture content creates a short handling window, while their low fat, natural sweetness and culinary versatility support applications that conventional nuts do not address. Market value therefore depends as much on post-harvest capability and product form as on orchard output.

The industry's economic centre is shifting from seasonal tonnage toward grade optimisation. Large, visually uniform marrons flow into premium fresh and confectionery channels; medium fruit supports roasted snacks and frozen kernels; smaller sound nuts move into flour and purée. Processors able to monetise every grade can pay growers more consistently and protect margins during uneven harvests.

Climate resilience and orchard renewal will shape the supply side through 2031. Disease-tolerant cultivars, biological pest control, mechanised collection and distributed cooling will support expansion, while branded convenience products and food-industry contracts will determine how rapidly additional volume converts into value.

Growth drivers

Convenient chestnut formats extend the selling season

Vacuum-packed roasted nuts, frozen peeled kernels and shelf-stable purées remove the peeling and preparation barrier that constrains fresh consumption. These formats enable supermarkets, bakeries and restaurants to merchandise chestnuts throughout the year and raise realised value per kilogram.

Gluten-free formulation accelerates chestnut flour demand

Chestnut flour offers natural sweetness, starch functionality and a premium origin story in breads, cakes, pasta and snack formulations. Specialist millers are converting smaller-grade nuts into higher-value ingredients, improving whole-crop economics while widening demand beyond traditional consumers.

Asian packaged-snack consumption supports scale

Roasted and peeled chestnuts are established convenience foods in China, Japan, South Korea and Southeast Asia. Modern retail, gifting formats and online grocery platforms are increasing branded penetration and shifting volume from loose seasonal trade into higher-value packaging.

New orchards unlock import substitution

Commercial plantings in the United States and Australia are moving toward bearing age and strengthening the case for regional collection, cold storage and processing hubs. Local supply shortens lead times, supports freshness claims and gives buyers alternatives to concentrated transcontinental sourcing.

Premium origin credentials sustain European value

Italian marroni, French confectionery traditions and protected European origins support price premiums well above undifferentiated bulk fruit. Traceability, cultivar selection and calibrated sizing allow processors

to defend margins in marrons glacés, purées and chef-grade kernels.

Industrial use improves whole-crop utilisation

Flour, paste, spreads and beverage applications create outlets for sound nuts that do not meet premium fresh-market size specifications. Better utilisation reduces disposal, stabilises grower returns and allows processors to balance seasonal quality variation across product lines.

Restraints

Climate volatility disrupts crop timing and sizing

Heat, drought and untimely rainfall alter flowering, kernel fill, pest pressure and harvest dates. The resulting swings in volume and calibre complicate retailer programmes and can create sharp seasonal changes in farmgate and export prices.

Pests and diseases raise orchard costs

Chestnut blight, ink disease, Asian chestnut gall wasp and storage rots reduce yields and merchantable quality. Growers and packers must invest in resistant cultivars, biological control, orchard sanitation and rapid post-harvest treatment.

Harvest and peeling remain labour intensive

Repeated collection rounds, rapid removal from orchard floors and difficult pellicle removal create high labour requirements. Small and steep orchards cannot always support conventional mechanisation, limiting scale and compressing margins when wages rise.

Fresh-product perishability constrains distribution

Chestnuts have higher moisture content than most tree nuts and remain susceptible to weight loss, mould and internal decay. Cold storage, controlled humidity, treatment and disciplined inventory rotation increase logistics costs and limit long-distance fresh programmes.

Chestnut Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Convenient chestnut formats extend the selling season	XXX	XXX	XXX
Gluten-free formulation accelerates chestnut flour demand	XXX	XXX	XXX
Asian packaged-snack consumption supports scale	XXX	XXX	XXX
New orchards unlock import substitution	XXX	XXX	XXX
Premium origin credentials sustain European value	XXX	XXX	XXX
Industrial use improves whole-crop utilisation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate volatility disrupts crop timing and sizing	XXX	XXX	XXX
Pests and diseases raise orchard costs	XXX	XXX	XXX
Harvest and peeling remain labour intensive	XXX	XXX	XXX
Fresh-product perishability constrains distribution	XXX	XXX	XXX

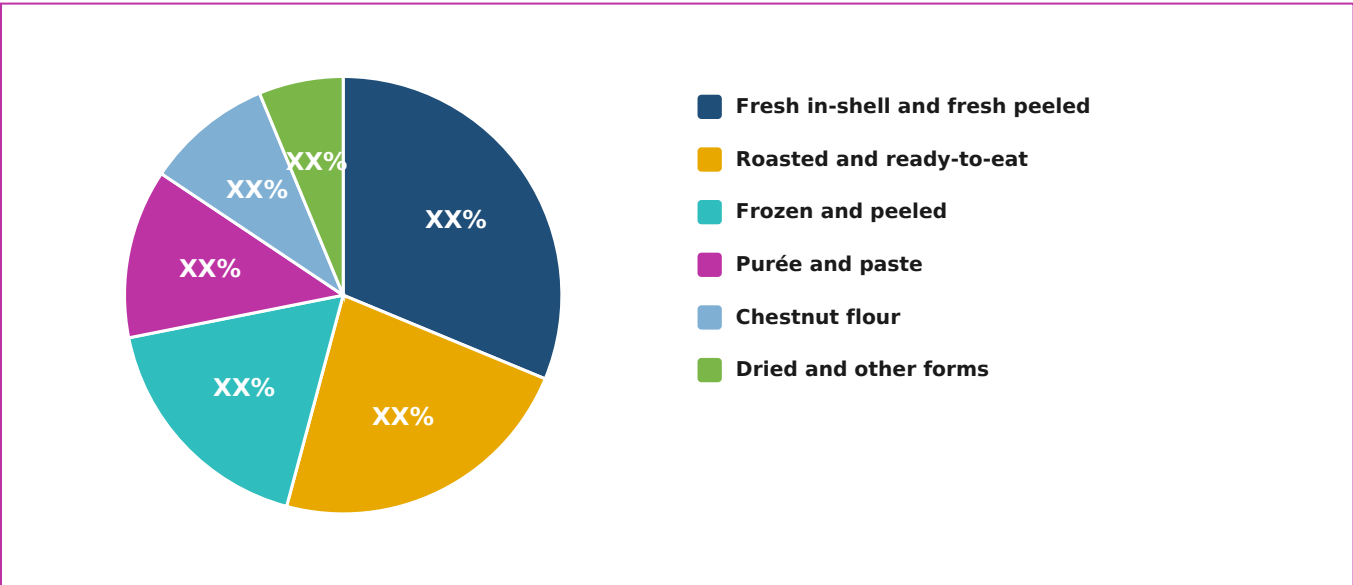
Source: XXX

Chestnut Market Segmentation by Product, Application and Channel

By Product Form

Fresh nuts retain leadership because China and Southern Europe maintain strong seasonal household consumption and fresh fruit commands premiums for large calibre. Roasted pouches and frozen peeled kernels are gaining share by eliminating preparation time and extending the sales window. Flour records the fastest growth as millers monetise smaller grades and food developers expand gluten-free applications.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Fresh in-shell and fresh peeled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted and ready-to-eat	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Frozen and peeled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Purée and paste	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chestnut flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dried and other forms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Species

Castanea mollissima supplies the majority of global tonnage and underpins China's fresh, roasted and export industries. European sweet chestnut and selected marron cultivars capture higher unit values in premium fresh and confectionery channels. Japanese, Korean, American and hybrid cultivars serve region-specific taste, disease-resistance and orchard-performance requirements.

Value by species, USD bn

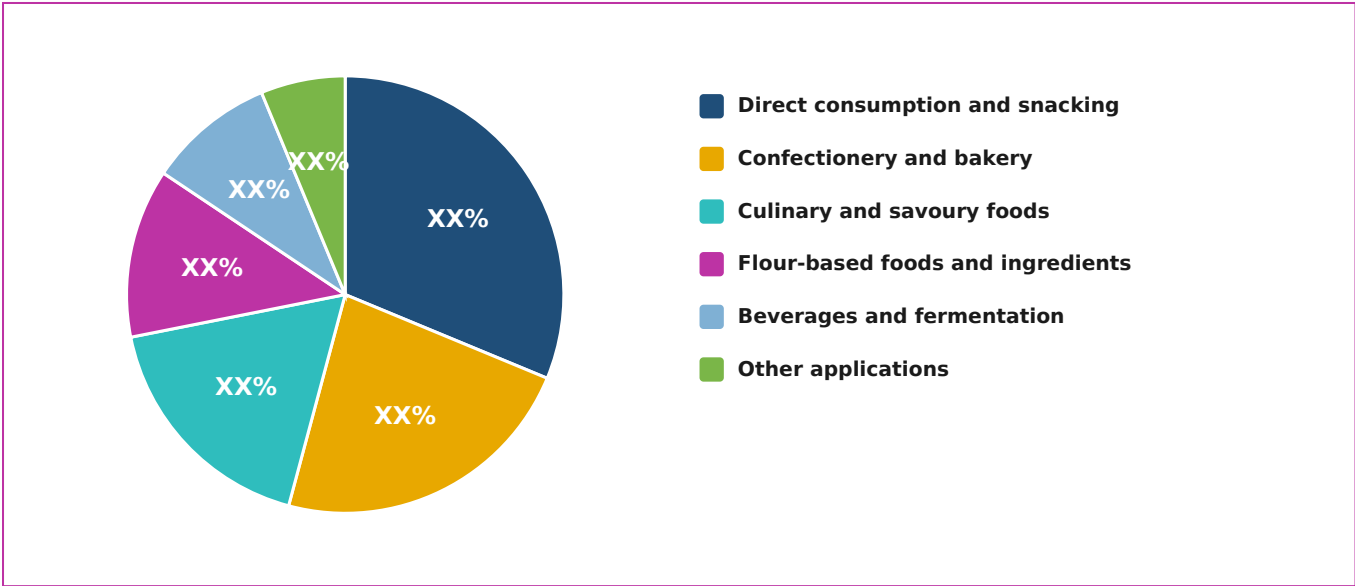
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Chinese chestnut	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
European sweet chestnut and marron	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Japanese and Korean chestnut	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
American and hybrid chestnut	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Home roasting, street vending and packaged snacking keep direct consumption dominant. Confectionery and bakery applications generate high value through marrons glacés, cakes, Mont Blanc desserts, fillings and seasonal specialities. Flour-based foods and savoury prepared meals are expanding as manufacturers seek differentiated grain alternatives and chefs adopt peeled frozen kernels.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct consumption and snacking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Confectionery and bakery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Culinary and savoury foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flour-based foods and ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beverages and fermentation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets, specialist grocers and e-commerce lead sales of fresh and packaged consumer products. Industrial processors buy peeled, frozen, dried and milled material against tighter specifications and provide steadier utilisation outside the harvest season. Foodservice remains strategically important for premium purée, pastry paste and calibrated kernels.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail and e-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholesale and traditional markets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Bulk sacks, crates and cartons remain essential for fresh wholesale and industrial users. Flexible pouches dominate the transition toward roasted, peeled and portion-controlled snacks, supported by retort and vacuum technologies. Frozen packs and aseptic foodservice containers gain as customers prioritise labour savings and year-round availability.

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bulk sacks, crates and cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail bags and pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Jars, cans and aseptic containers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Vacuum and frozen packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

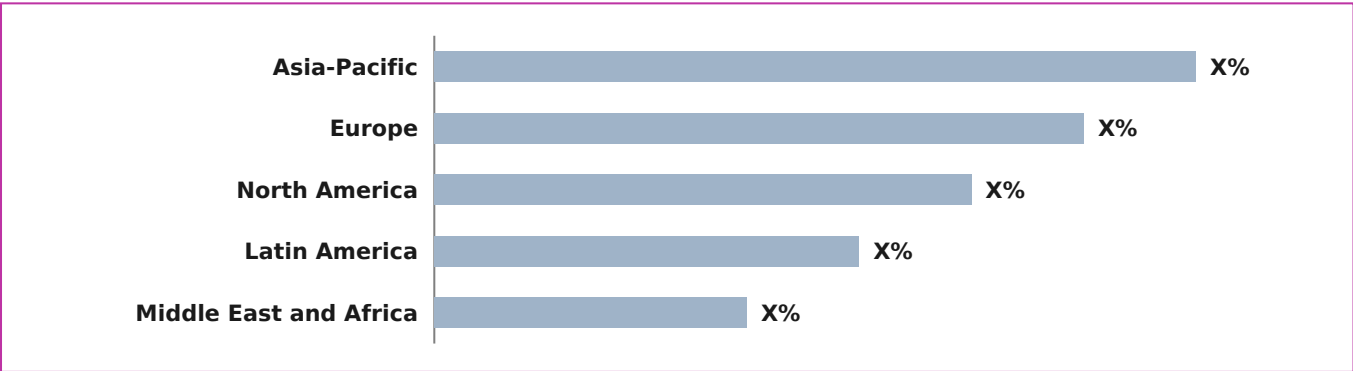
Chestnut Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global chestnut market value in 2025. China anchors the region through its XXX-tonne 2024 harvest, extensive traditional consumption and large roasted-snack and primary-processing base. Japan and South Korea remain premium destinations for calibrated, peeled and confectionery-grade nuts, while Thailand and other Southeast Asian markets provide growing outlets for economical Chinese roasted products.

Europe represented XX% of 2025 value and remains the centre of premium processing. Italy combines domestic production with substantial imports to feed fresh packing, marrons glacés and purée operations; in 2024 it reported USD XXX million of exports and USD XXX million of imports. Spain, Portugal, France, Greece and Türkiye form complementary supply corridors, with protected origins, cultivar identity and foodservice relationships supporting superior unit values.

North America is the fastest-growing region at an XX% CAGR through 2031. USDA recorded XXX US farms and XXX chestnut acres in the 2022 Census of Agriculture, establishing a larger orchard pipeline than current commercial volumes imply. Processing cooperatives, regional cold storage and flour utilisation will determine how efficiently this acreage converts into import substitution and stable year-round sales.

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
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

Chestnut Market Competitive Landscape and Company Share

The global chestnut market is structurally fragmented, with thousands of growers, local collectors and specialised processors serving regional demand. The ten largest commercial processors and branded suppliers controlled XX% of 2025 value; no company held a global double-digit share. Scale advantages arise from contracted procurement, hydrothermal peeling, frozen storage, optical sorting and the ability to direct each grade into fresh, snack, flour or purée channels.

European specialists including Agrimola, Clément Faugier, Sabaton, Corsiglia and Mastrogregori compete on origin, confectionery know-how and foodservice consistency. Chinese companies compete through crop access, cost-efficient roasting and flexible private-label packaging, while Hero Group brings broader foodservice distribution to chestnut purée. Regional businesses such as Chestnut Growers, Route 9 Cooperative and Treeborn are building differentiated North American supply.

Competitive investment is moving toward automated grading, continuous peeling, aseptic purée, individually quick frozen kernels and grower-linked collection networks. Partnerships with bakers, chefs and ingredient developers are becoming as important as traditional autumn retail programmes, because processed applications improve plant utilisation and absorb smaller grades.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Agrimola S.p.A.	XXX	XXX	XXX	XXX
Clément Faugier	XXX	XXX	XXX	XXX
Sabaton	XXX	XXX	XXX	XXX
Corsiglia Marrons Glacés	XXX	XXX	XXX	XXX
Hero Group	XXX	XXX	XXX	XXX
Mastrogregori Aldo S.r.l.	XXX	XXX	XXX	XXX
F.Ili Castellino	XXX	XXX	XXX	XXX
Chestnut Growers, Inc.	XXX	XXX	XXX	XXX
Route 9 Cooperative	XXX	XXX	XXX	XXX
Treeborn Products	XXX	XXX	XXX	XXX

Source: XXX

Global Chestnut Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Fresh chestnuts will remain the largest format, but XX% of incremental value will come from roasted ready-to-eat products, frozen or peeled kernels, flour, paste and purée. Suppliers that convert a short harvest into a twelve-month portfolio will achieve the strongest revenue quality.

The base-case forecast assumes gradual production growth, continued premium pricing for large-calibre European marrons and sustained packaged-snack demand in Asia. A tighter climate scenario would restrain physical volume but lift unit values, while faster maturation of North American orchards would expand local flour and frozen-kernel supply without materially displacing Asian consumption.

Winning strategies will pair resilient cultivars and orchard technical support with post-harvest speed, multi-grade processing and auditable origin. The most attractive whitespace lies in gluten-free bakery ingredients, foodservice-ready peeled kernels, lower-sugar chestnut spreads and premium snack formats designed for online and convenience retail.

Opportunities

- Gluten-free bakery blends and clean-label binders
- Roasted snack pouches for convenience and e-commerce channels
- Frozen peeled kernels for foodservice and industrial kitchens
- North American import substitution
- Premium traceable marrons and geographical-indication products
- Upcycling undersized chestnuts into flour, beer, spreads and plant-based fillings
- Mechanised harvest, optical sorting and distributed cold-storage services

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.