

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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Greece

Post: Rome

Tree Nuts Annual 2012

Report Categories:

Tree Nuts

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Report Highlights:

Greece is the third largest producer of almonds in the EU-27, after Spain and Italy. Per capita consumption of tree nuts in Greece at 17 kilos/year is the highest in the EU and one of the highest in the world. MY 2012/13 Greek almond production is forecast to recover in terms of both quantity and quality. The United States is the main almond and pistachio supplier to the Greek market.

I. ALMONDS

Table 1: Production, Supply and Demand (MT)

Almonds, Shelled Basis	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	40,000	40,000	40,000
Area Harvested	38,000	37,000	39,950
Production	12,000	10,000	14,000
Imports	6,035	6,555	6,560
Total Supply	18,035	16,555	20,560
Exports	1,418	1,100	1,098
Domestic Consumption	16,617	15,455	19,462
Total Distribution	18,035	16,555	20,560

Source: Unofficial estimates based on Greek industry contacts; GTA

PRODUCTION

Greece is the third largest producer of almonds in the EU-27, after Spain and Italy. Almond cultivation in Greece has a long tradition and history. According to industry estimates, there are approximately 40,000 hectares currently cultivated for almonds, including all types of systematically cultivated orchards and a large number of scattered trees (yielding about 1,200 MT annually for private consumption).

The main almond producing areas include five prefectures (Katerini, Serres, Kavala, Magnisia, and Larissa) of Central Macedonia and Thessaly, located in northern Greece. The quality of Greek almonds is considered excellent and the most popular varieties are Ferragnes, Texas, Troito, and Retsou. The Ferragnes variety is growing in popularity and replacing many traditional ones.

MY 2012/13 Greek almond production is forecast to recover in terms of both quantity and quality. MY 2011/12 has been characterized as one of the worst crops in the last 15 years. In fact, heavy frost in December and adverse conditions in March heavily damaged the crop in the main producing areas, reducing the harvest by 60-70 percent.

CONSUMPTION

Per capita consumption of tree nuts in Greece at 17 kilos/year is the highest in the EU and one of the highest in the world. Almonds represent an important component of the Greek diet. Greeks consume almonds mainly as a snack food, and, to a lesser extent, as an ingredient for confectionary products, such as ice cream and chocolate.

TRADE

Greece is a net importer of almonds. The United States is the main almond supplier to the Greek market, accounting for 65 percent of total imports. Spain is also an important supplier to the Greek market, accounting for 26 percent of the total. Imported almonds are destined mainly for the confectionary, ice cream, and chocolate industries, both for the domestic and re-export markets, mainly Bulgaria and Italy.

Greece exports small amounts of almonds. Bulgaria and Italy continue to be the main destinations for Greek almonds. Greek almond exports are destined for both the snack and confectionary industry.

II. PISTACHIOS

Table 2: Production, Supply and Demand (MT)

Pistachios, In-shell Basis	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	4,900	4,900	9,000
Area Harvested	4,800	4,850	8,850
Beginning Stocks	460	405	390
Production	3,000	3,150	5,000
Imports	1,948	960	962
Total Supply	5,408	4,515	6,352
Exports	1,262	1,100	1,098
Domestic Consumption	3,741	3,025	4,879
Ending Stocks	405	390	375
Total Distribution	5,408	4,515	6,352

Source: Unofficial estimates based on Greek industry contacts; GTA

PRODUCTION

According to industry estimates, MY 2012/13 Greek pistachio area and production are forecast to increase significantly. Greek pistachios are produced mainly in the Island of Egina and in the area of Lamia, located in central Greece. New producing areas include the Makrakomi area of Central Greece and the municipality of Oropos, in East Attica. Due to its distinct flavor, form, and full kernel, the Aegina pistachio has been recognized by the European Commission as a PDO (Protected Designation of Origin).

CONSUMPTION

MY 2012/13 Greek pistachio demand is forecast to grow driven by increased production. Greeks mainly consume pistachios fresh, as a snack food, and, to a lesser extent, as an ingredient for confectionary products, such as ice cream and chocolate. Imported pistachios comprise a significant portion of Greek consumption.

TRADE

Greek pistachio imports come mainly from the United States and France. Imported pistachios are destined for the confectionary and ice cream sectors. Greece is an emerging exporter. France represents the main destination for Greek pistachios.

Abbreviations and Definitions Used in this Report

MY Marketing Year

Almonds and Pistachios: September/August

HS Codes:

Almonds: Shelled 080212; In-shell 080211

Pistachios: 080250

Conversion factors used to convert shelled to in-shell tree nuts:

Almonds: 3.3

Pistachios: 1.5

Ha hectare; 1 ha = 2.471 acres

MT Metric ton = 1,000 kg

MS EU member state(s)