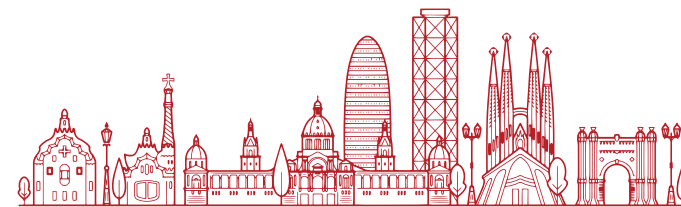


Market Profile: European Union



Trade

- Tree nuts are the largest agricultural export to the EU (value basis): soy and almonds are the top individual export commodities.
- #2** export region for California almonds (25%) behind Asia-Pacific (28%).
- Shipments in FY 24/25 rose slightly by about **1.5%** compared to FY 23/24



- Spain, Germany, Netherlands, and Italy account for **80%** of the exports to EU in FY 24/25, receiving about **480 million pounds**.
- Spain is also the **3rd largest producer** of almonds shipments and a major transshipment point for the EU.



Key Facts:

Europe leads in global new almond product introductions, with almost half of the total global product introductions, twice that of any other market.



Key Issues

- Inconsistencies in Member State approaches to import controls, and recognition of Pre-Export Check (PEC) program parameters.
- California almonds are the only U.S. commodity recognized under EU food import control legislation for pre-export checks, in effect since August 1, 2016, and reduces import controls to < 1%.
- It remains to be seen how transshipments between EU and UK will be affected post-Brexit.
- Proposed EU-U.S. Trade Agreement would create TRQ for nuts, which would effectively result in zero tariffs on California almonds.
- EU's 'Agri-food Vision' Road map continues to emphasize sustainability, organic production, phaseout/elimination of chemical tools and implementing an ecolabel scheme for all products. ABC continues to monitor various EU proposals that may impact almond exports.
- Pesticide cut-off criteria and hazard-based approach to risk assessments are not scientifically supported and are resulting in the elimination of chemical tools necessary to maintain plant health.
- E.U. funded 'Iberian Almonds' advertising program that aims to take advantage of increasing production in Portugal, and emphasize local origins.

Almond Exports to the EU (Million Lbs.)

Aug-July ABC Data in Lbs/MTs

