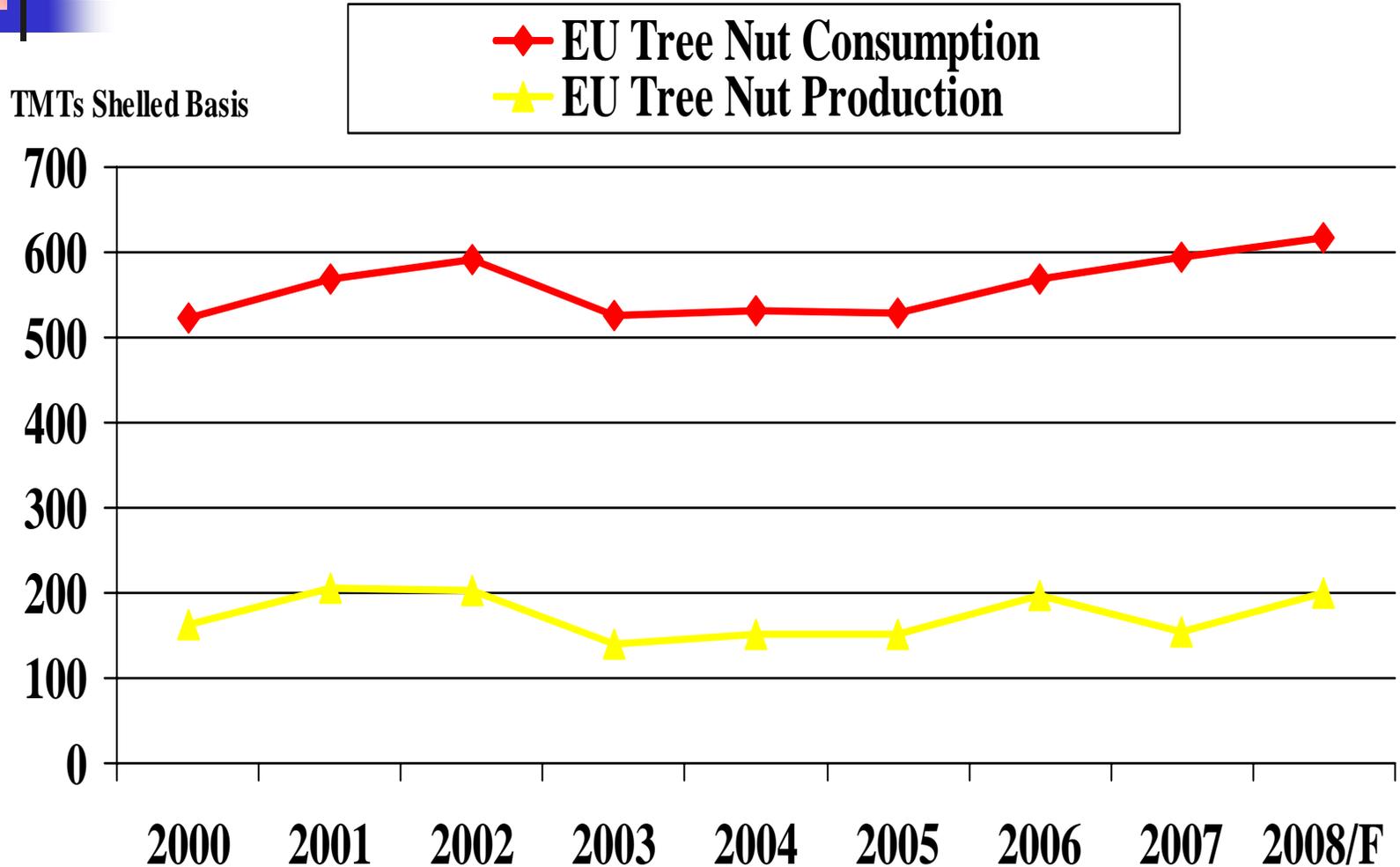


## Tree Nuts Update: European Union-27

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- In efforts to provide valuable market information for stakeholders, FAS now offers a consolidated European Union (EU) tree nuts report. The report details EU-27 tree nut production, trade, and market enhancement policies.
- The following charts present an analytical understanding of European tree nut market based on supply and demand information beginning in marketing year (MY) (Sep/Aug) 2000 through forecast MY 2008, as it is constructed today.

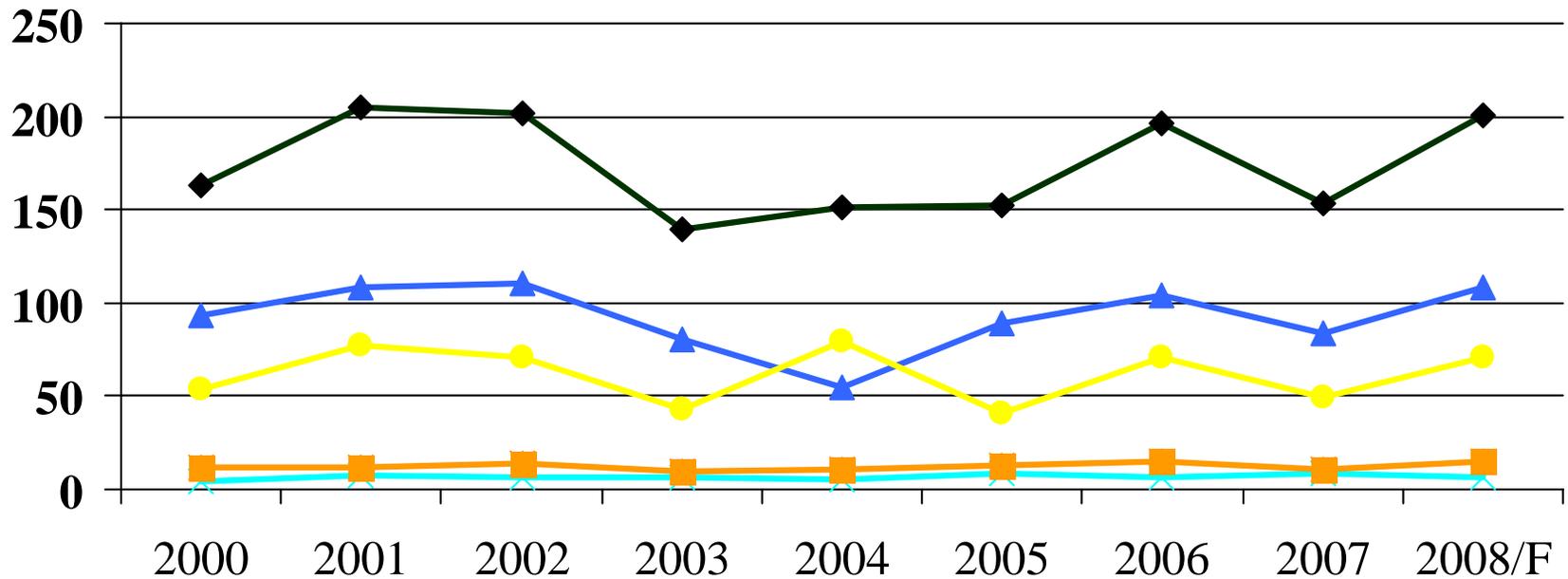
# The European Union (EU) Market for U.S. Tree Nuts Appears to be on Trend to Provide Increasing U.S. Export Opportunities. EU Tree Nut Production Fluctuates, While EU Consumption Trends Upward.



# EU Tree Nut Production Fluctuates Within Normal Production Patterns and Parameters

◆ TN Production ▲ Almond ● Hazelnut ✕ Pistachio ■ Walnut

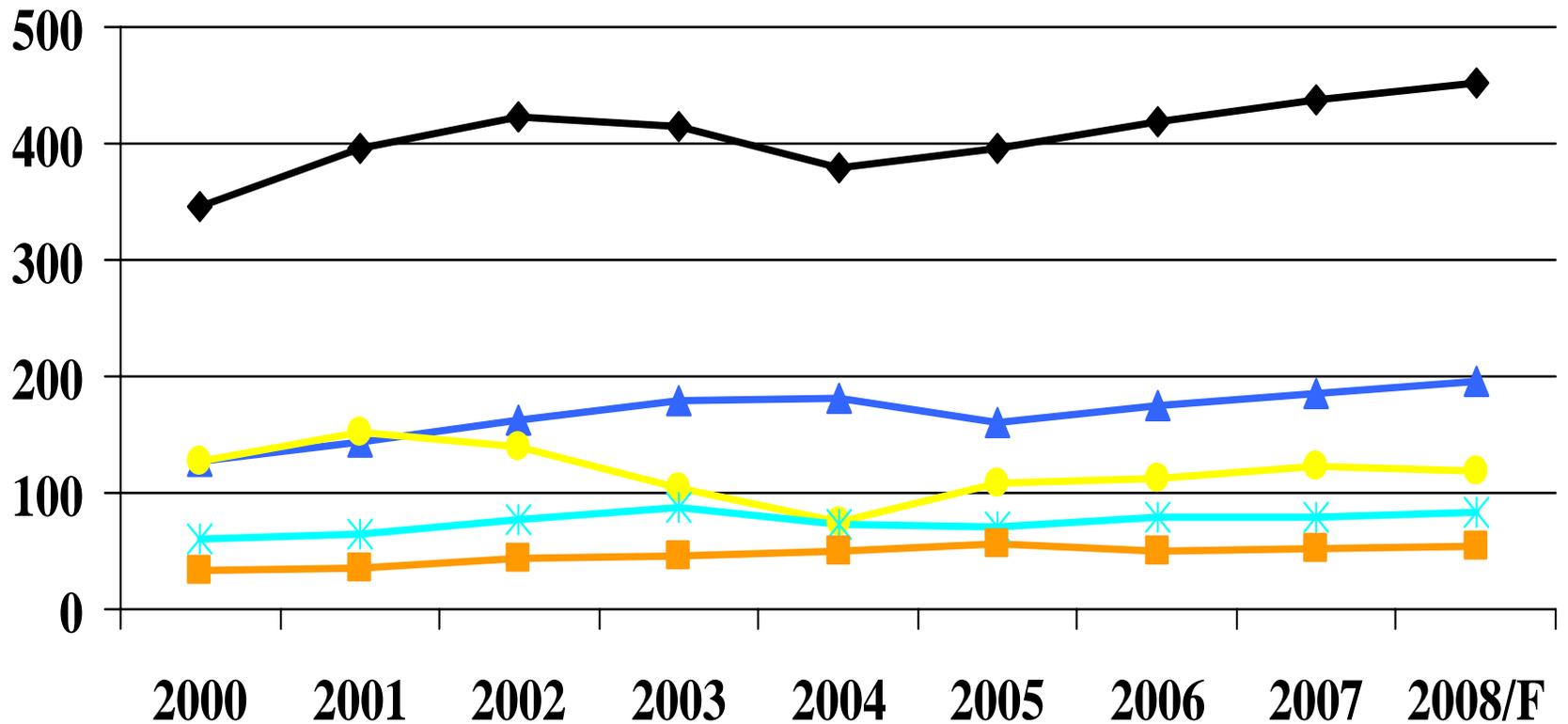
TMTs Shelled Basis



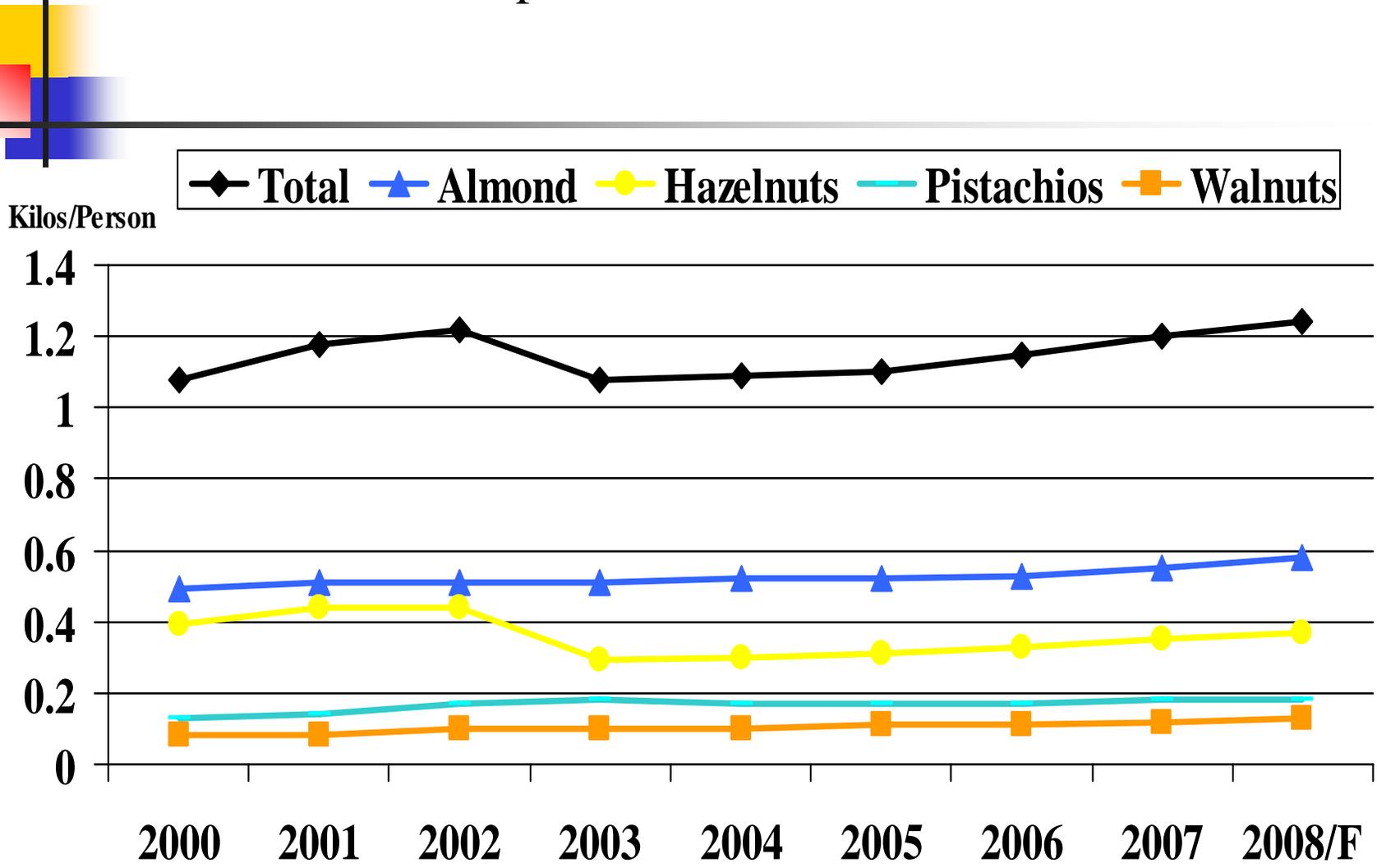
# EU Consumers Depend on U.S. Tree-Nut Exports to Satisfy Growing EU Demand. Without U.S. Exports, EU Consumers Would be Forced to Alter Consumption Habits



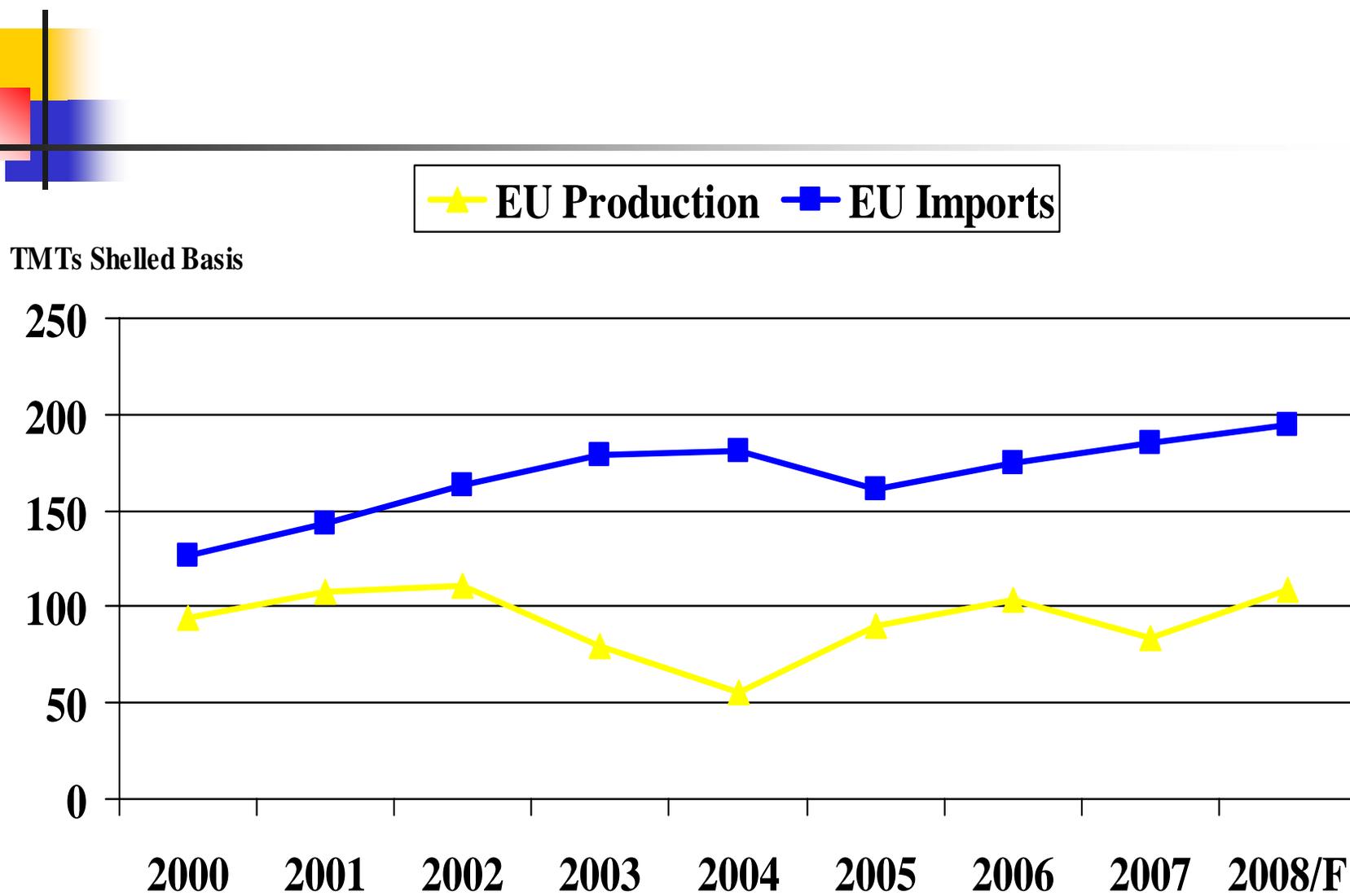
TMTs Shelled Basis



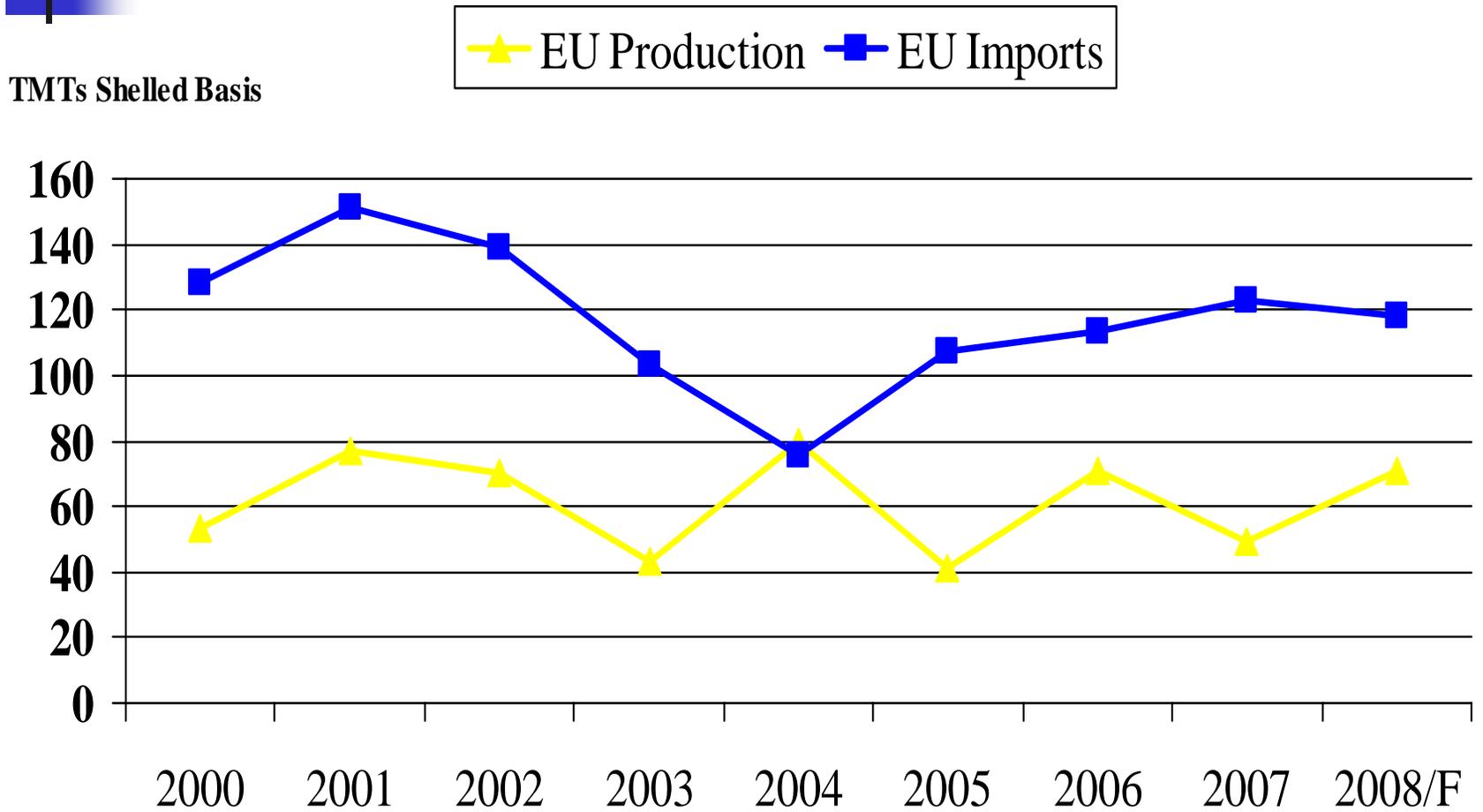
# EU-27 Per Capita Tree Nut Consumption Will Likely Remain Strong, as More and More EU Consumers Learn About the Health Benefits of Increased Tree Nut Consumption



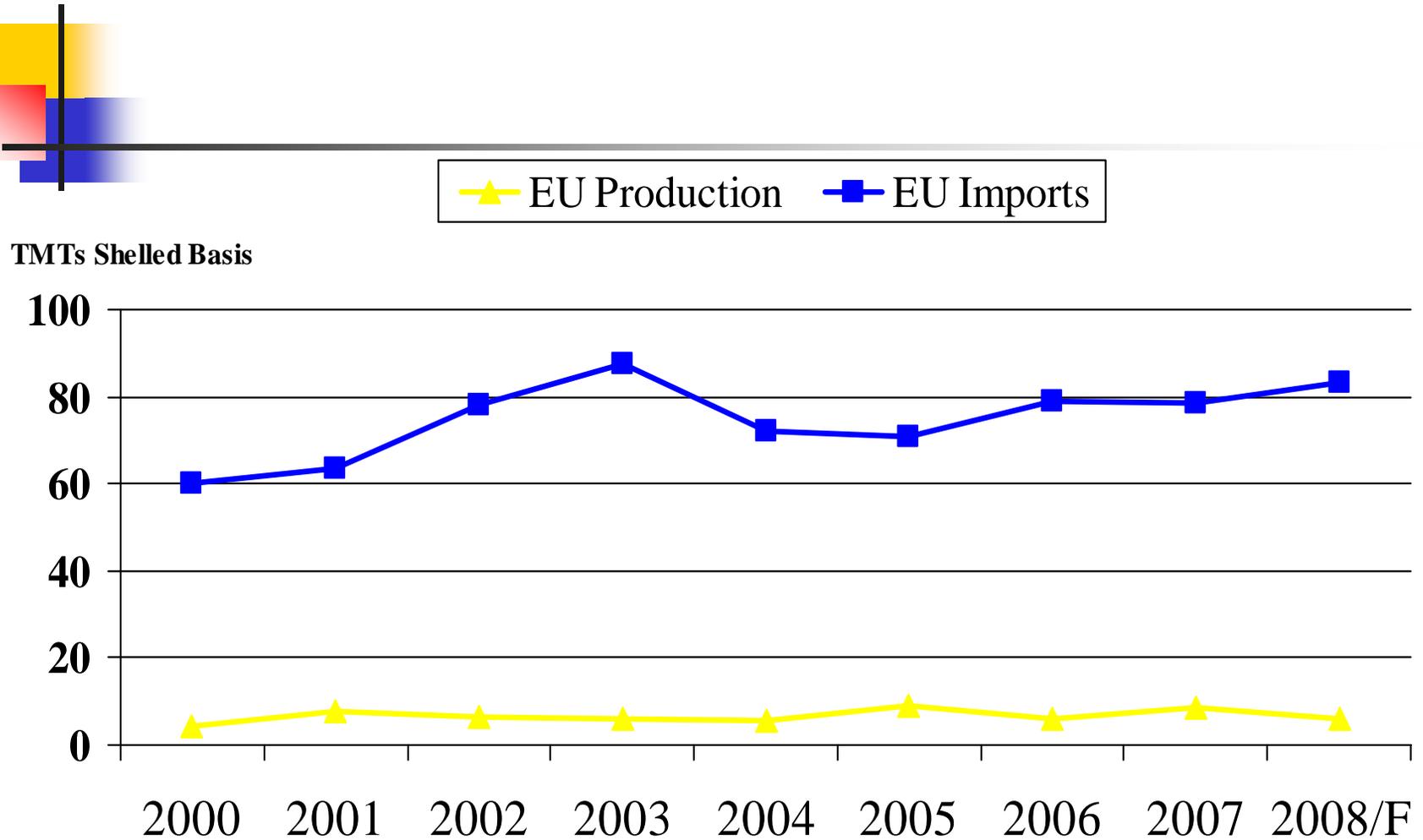
# U.S. Almond Exporters, With Very Limited Export Competition Worldwide, Are Indispensable in Terms of Meeting EU Almond Demand



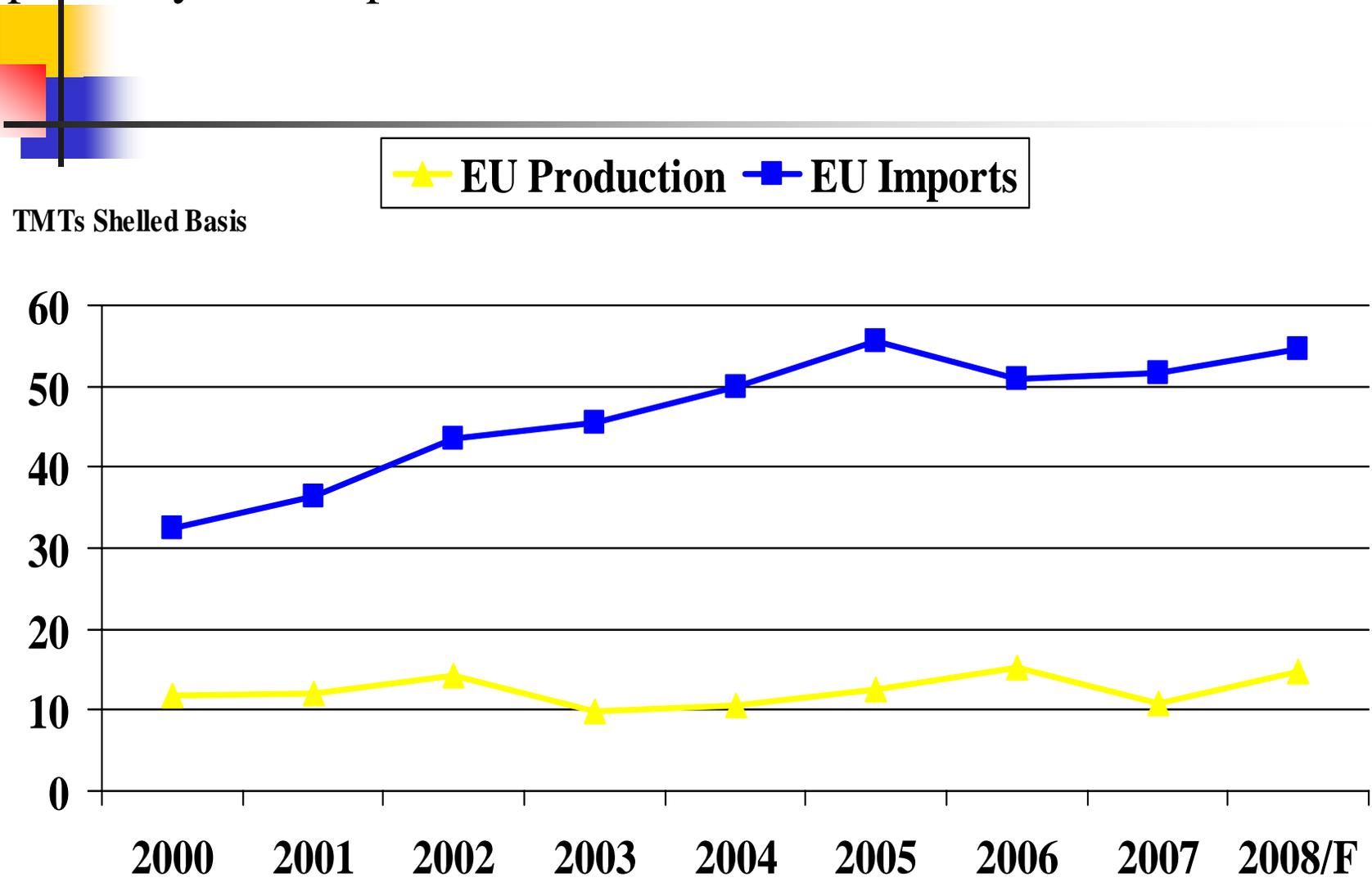
# However, U.S. Hazelnut Production and Exports Have Been Hard Hit by Blight, and as a Result, Turkey Is the Major Supplier to the European Market

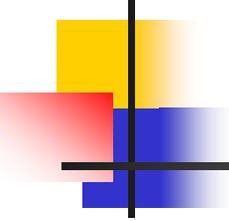


# U.S. Pistachio Exporters Compete With Iranian Exports in the European Market. EU Production Is Almost Nonexistent.



# U.S. Walnut Exporters Are Seeing an Ever Widening Gap Between EU Walnut Production and EU Consumer Demand, Providing an Excellent Opportunity to Compete With Chile and Moldova for Market Share



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- *The FAS Attaché Report web search engine allows users to search for tree nuts reports for various countries  
(<http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp>).*
  - *The Production, Supply, & Demand database can be found at  
<http://www.fas.usda.gov/psdonline/psdHome.aspx>*
  - *For more information, please contact Lashonda McLeod at (202) 720-6086.*