

SAPPA

Pecanomics 2024

These statistics are derived from the South African Revenue Service (SARS) and collected by SAPPA from processors and nurseries. The report is divided into two parts. Part one focuses on pecan production, both globally and in South Africa. Part two concentrates on South African pecan exports, including both in-shell and shelled products.

Disclaimer: All USD (\$) prices are based on average USD/Rand Exchange Rates for the specific year mentioned.

For enquiries contact:

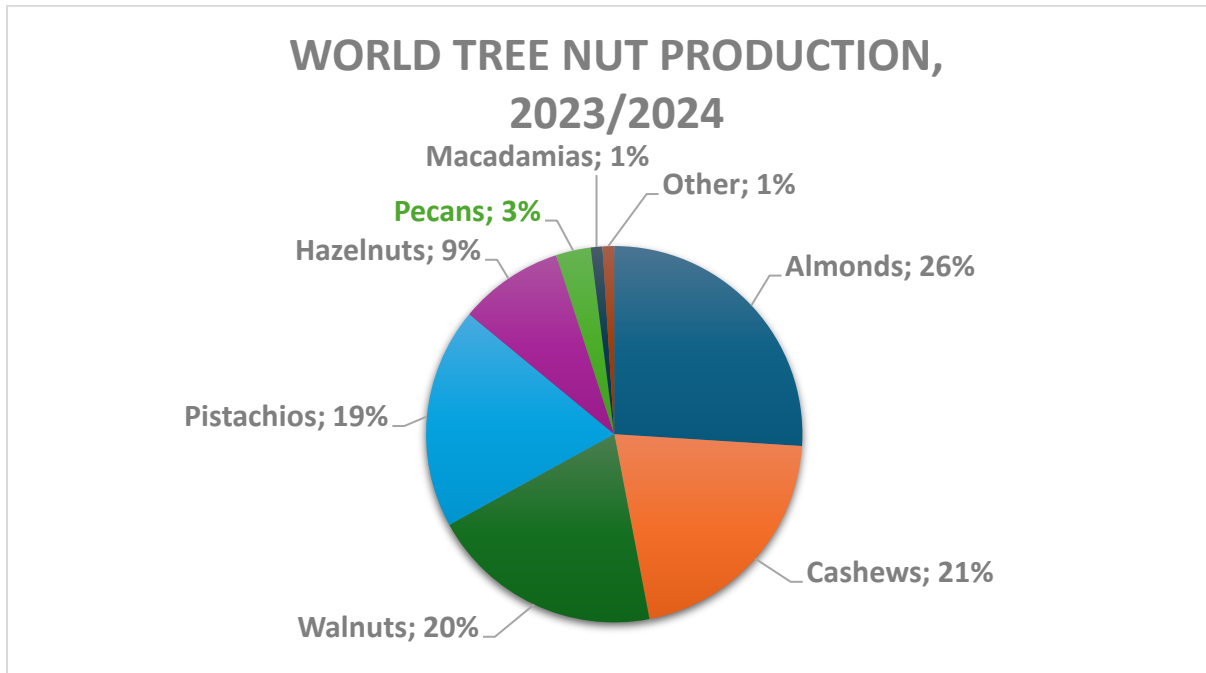
Agricultural Economist: RP Campher

info@sappa.za.org



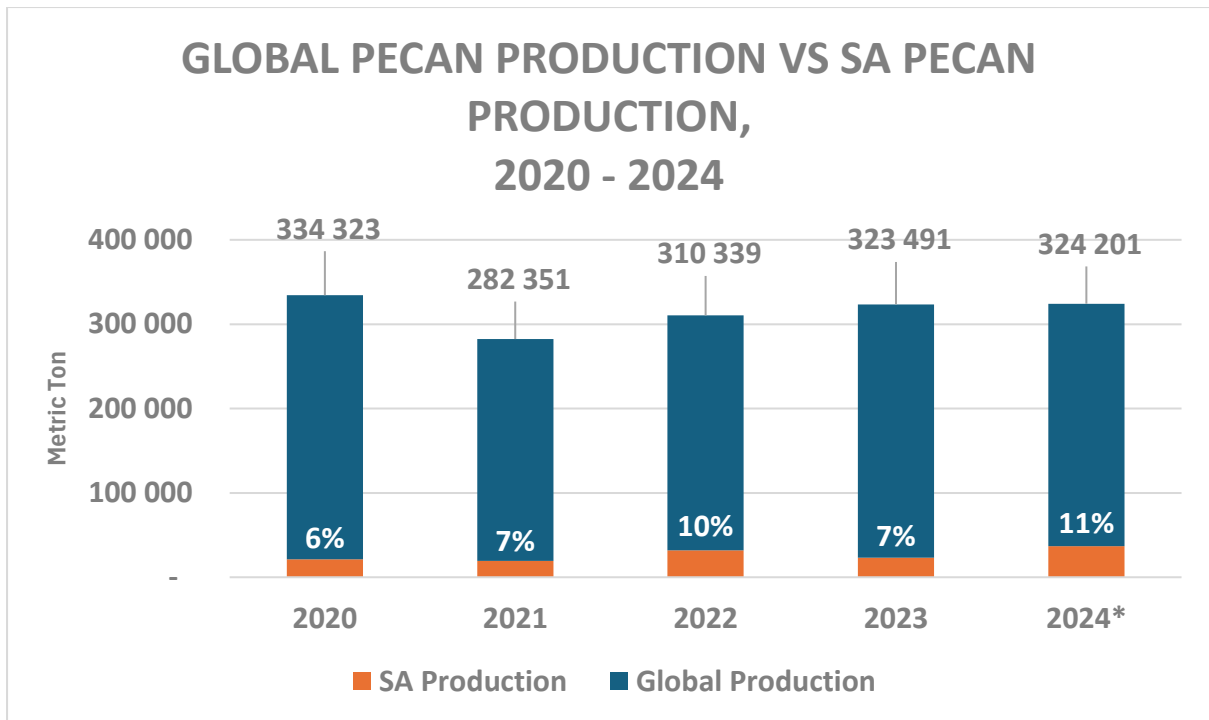
1. Global and South African Pecan Production Overview

This section provides insights into global pecan production trends, with a specific focus on South Africa's contribution to the market. It covers production volumes, growth trends, and factors influencing the industry.



Source: International Nut Council (INC); Statistical Yearbook 2024

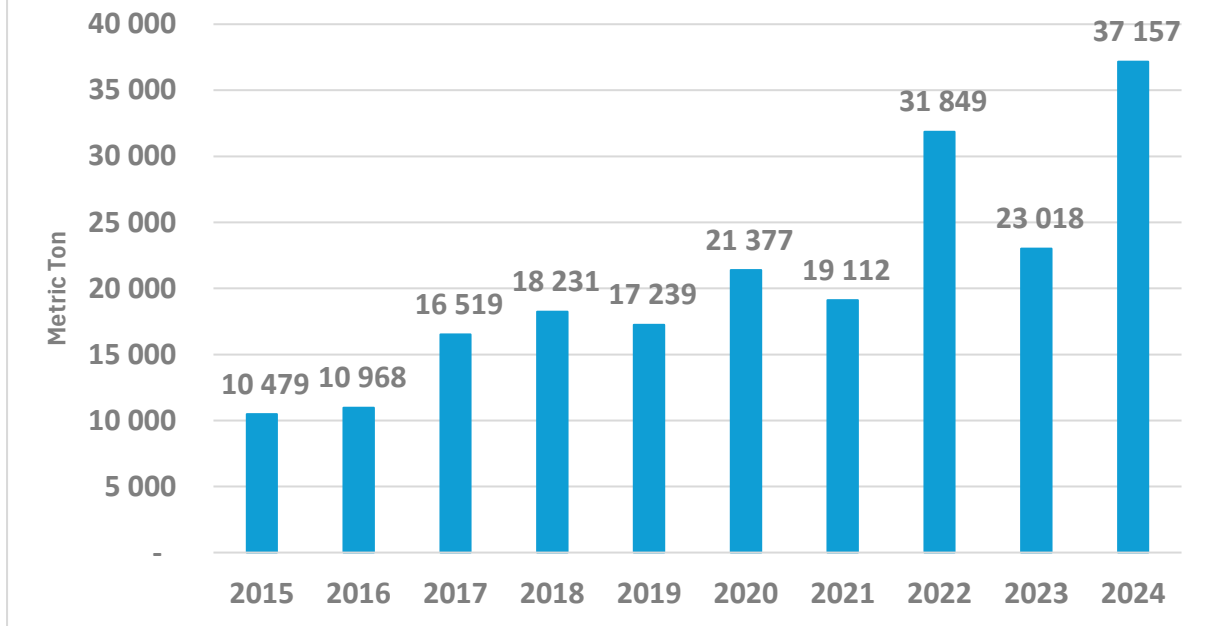
- a) The pie chart illustrates the global production shares of various tree nuts for the 2023/2024 season. Almonds led with the largest share at 26%, followed by cashews at 21% and walnuts at 20%. Pistachios account for 19% of the total production, while hazelnuts contribute 9%. Pecans make up 3%, and macadamias and other nuts each represent 1%.



Source: International Nut Council (INC); Statistical Yearbook 2024 & South African Pecan Nut Producers Association (SAPPA)

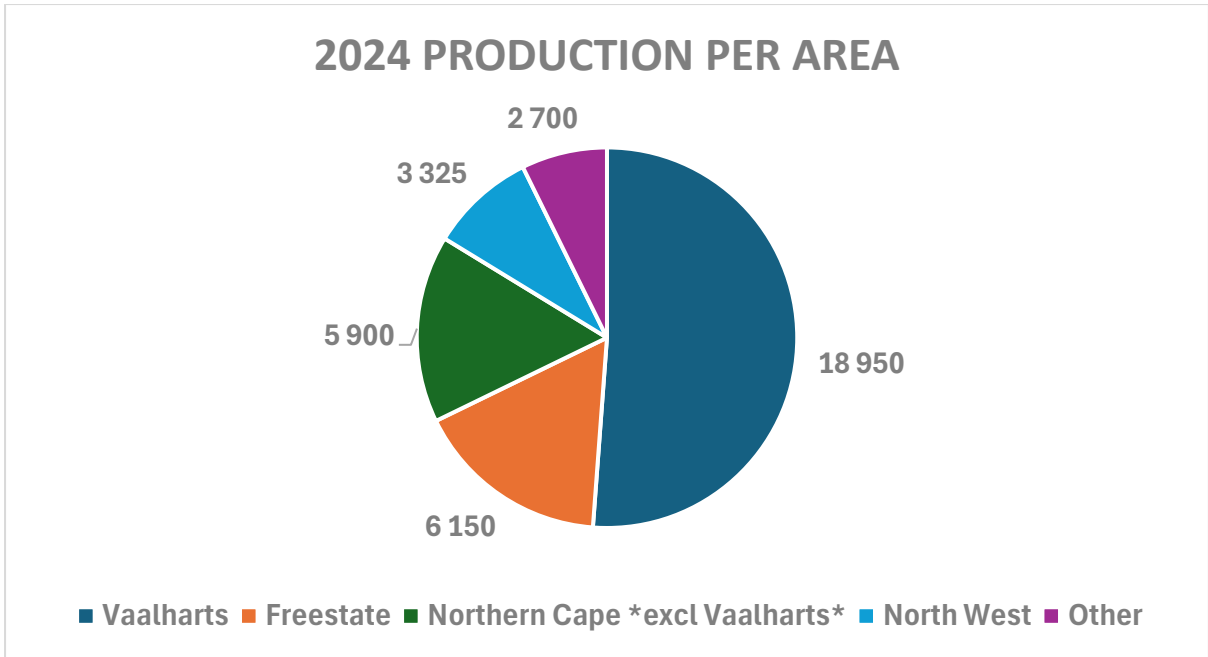
- b) The chart compares global pecan production with South African pecan production from 2020 to 2024. Global production volumes, represented by blue bars, show some variation over the years, peaking in 2020 at 334,323 metric tons and stabilizing at approximately 324,201 metric tons in 2024 (projected by INC 2024 Statistical Yearbook). South African production, indicated by orange bars, shows a steady growth trend, increasing its share of global production from 6% in 2020 to 11% in 2024.

SOUTH AFRICAN PECAN PRODUCTION, 2015 - 2024



Source: South African Pecan Nut Producers Association (SAPPA)

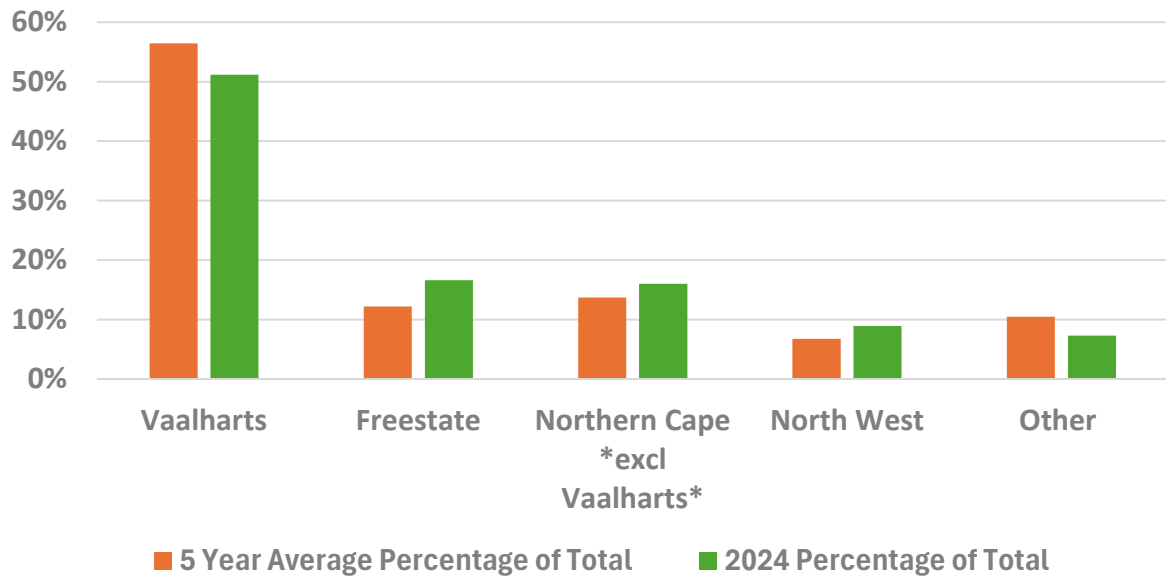
- c) The chart highlights the growth of South African pecan production over the past decade. Beginning at 10,479 metric tons in 2015, production experienced a consistent upward trend, peaking at 37,157 metric tons in 2024.



Source: South African Pecan Nut Producers Association (SAPPA)

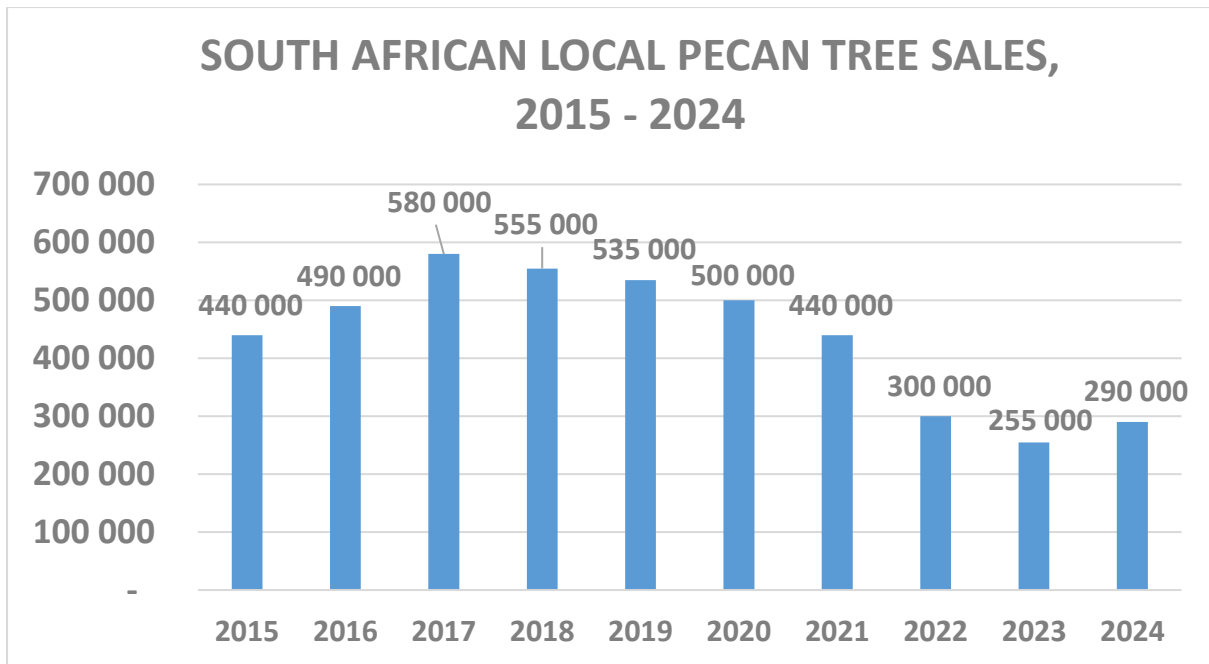
- d) The chart presents the pecan production volumes for 2024, broken down by production areas in South Africa. Vaalharts leads with the highest contribution at 18,950 metric tons, accounting for a significant portion of the total output. The Free State follows with 6,150 metric tons, while the Northern Cape (excluding Vaalharts) contributes 5,900 metric tons. North West produces 3,325 metric tons, and other regions collectively account for 2,700 metric tons.

PRODUCTION PER AREA, 5-YEAR AVERAGE VS 2024-SEASON



Source: South African Pecan Nut Producers Association (SAPPA)

- e) This comparison of regional contributions to South African pecan production highlights shifts between the 5-year average (2019–2023) and the distribution for 2024. Vaalharts remains the dominant production area, but its share decreased from an average of 56% to 51% in 2024. In contrast, the Free State shows significant growth, with its contribution increasing from 12% to 17%. Similarly, the Northern Cape (excluding Vaalharts) raised from 14% to 16%. North West also experienced a moderate increase, moving from 7% to 9%. In contrast, the "Other" category saw a decline, decreasing from 10% to 7% over the same period.



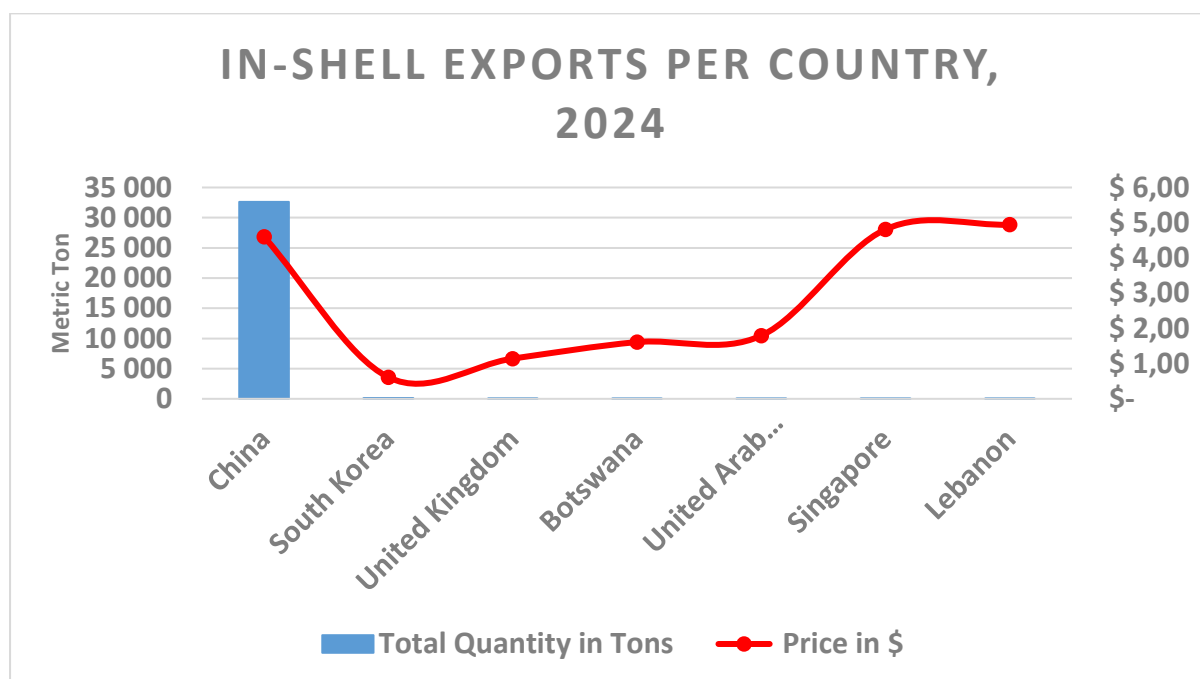
Source: South African Pecan Nut Producers Association (SAPPA)

- f) The chart illustrates the local annual sales of pecan nut trees from 2015 to 2024. Sales peaked in 2017 with 580,000 trees sold, followed by a decline in the subsequent years, reaching a low of 255,000 trees in 2023. After this dip, there was a slight recovery in 2024, with tree sales increasing to 290,000. By the end of 2024, the AARC finalized the South African Pecan Orchards map, revealing a total of 55,484 hectares of orchards. This includes orchards larger than 1 hectare and trees older than approximately 1 year at the time of data collection.

2. South African Pecan Exports: In-Shell and Shelled

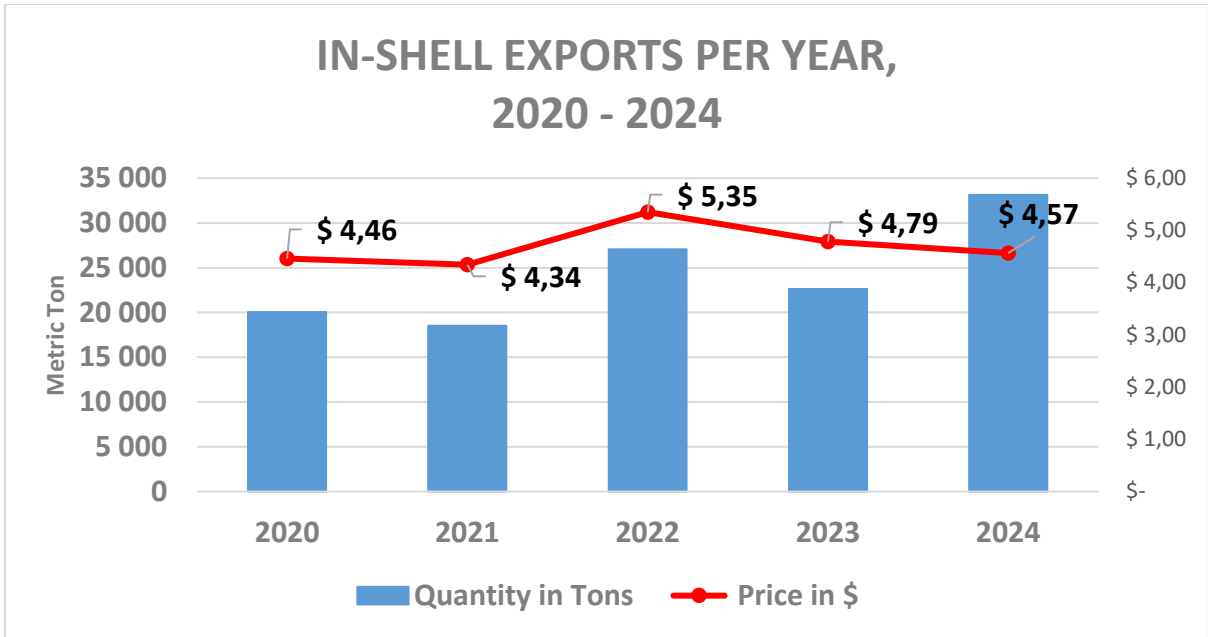
This section delves into the export statistics of South African pecans, analysing the distribution of in-shell and shelled products, as well as export trends.

2.1. In-Shell



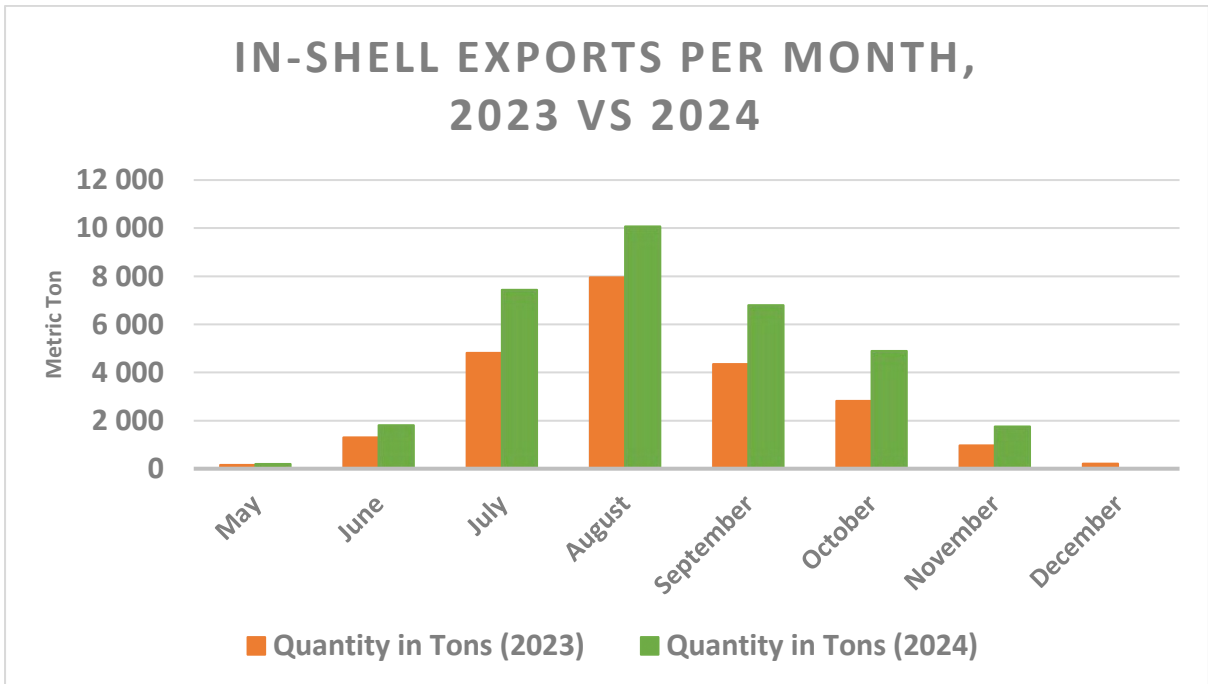
Source: South African Revenue Service, 2024 (SARS)

- g) This graph illustrates the South African in-shell pecan market. China dominates as the largest importer, receiving 32,620 metric tons from South Africa in 2024, which accounts for a remarkable 98.4% of the total in-shell export market.



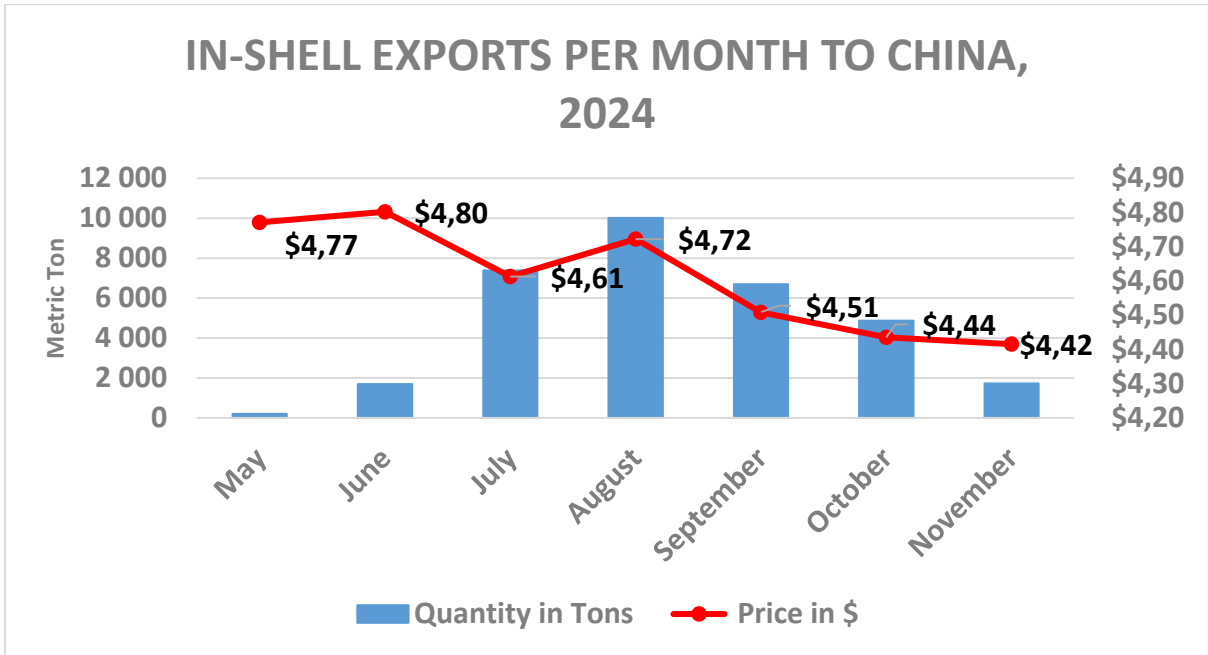
Source: South African Revenue Service, 2024 (SARS)

h) South African in-shell pecan exports remained robust from 2020 to 2024, with higher yields in 2024 contributing to a notable boost in exports. Additionally, while the average price per kilogram decreased slightly from 2023 to 2024, it appears to be stabilizing.



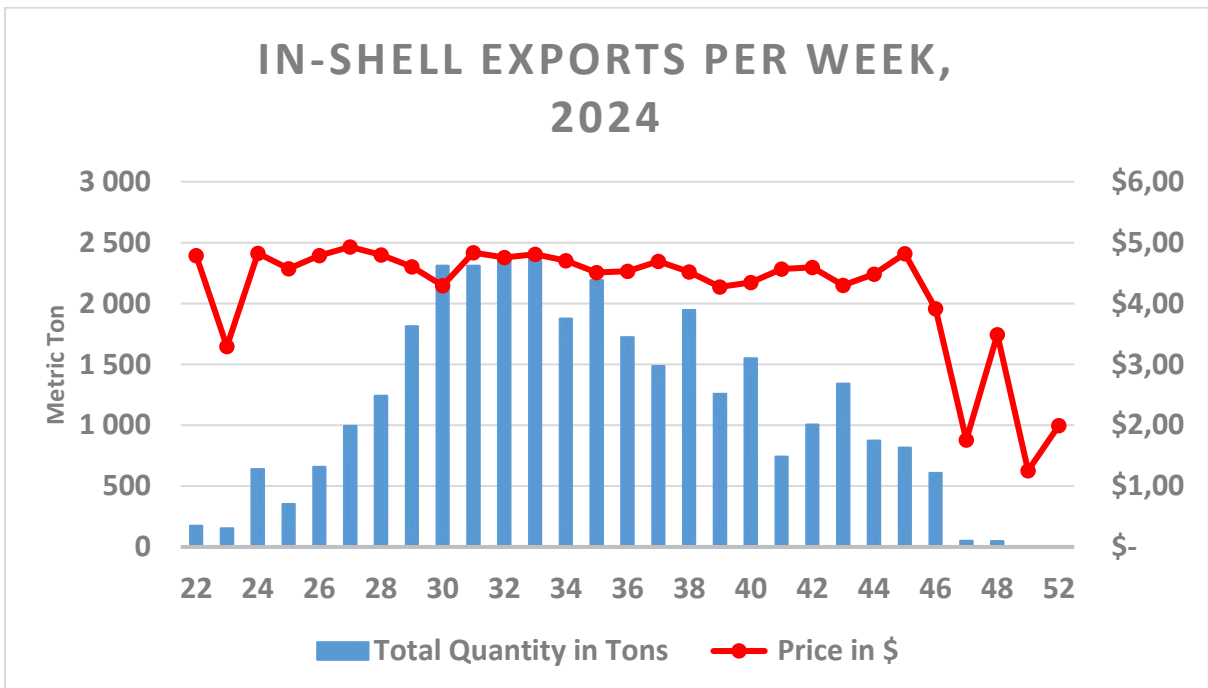
Source: South African Revenue Service, 2024 (SARS)

i) This graph highlights monthly in-shell exports for 2023 and 2024, showing a similar trend across both years. The key distinction is the higher yield in 2024, which led to an increase in export volumes. This growth also reflects the expansion of South Africa’s processing capacity.



Source: South African Revenue Service, 2024 (SARS)

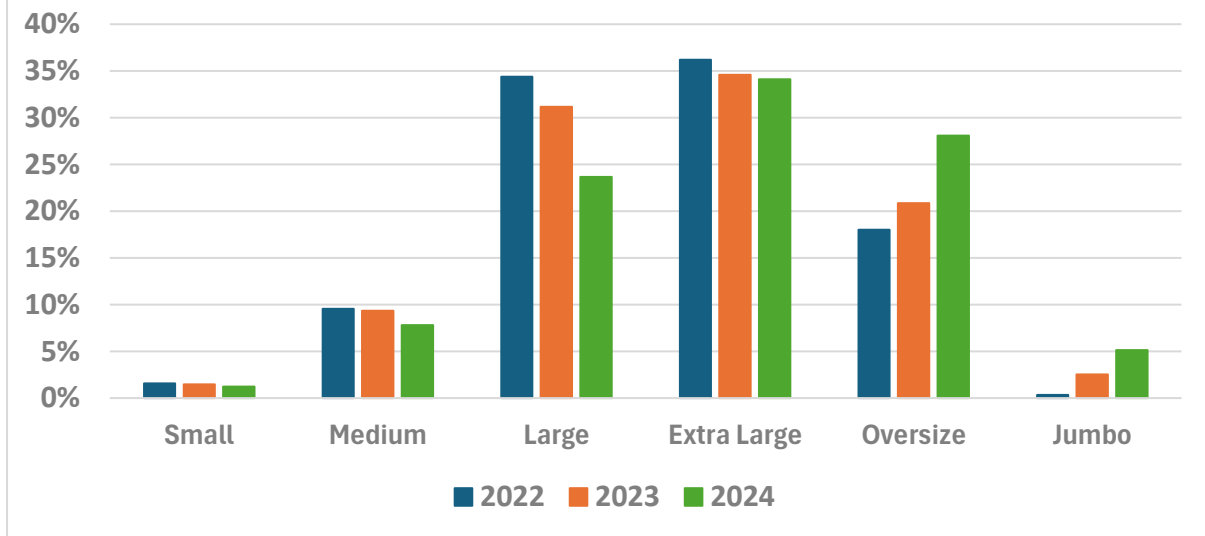
- j) South Africa's monthly in-shell exports in 2024 reveal that the highest export volume for a single month occurred in August, totalling 10,005 metric tons. November saw the lowest average price per kilogram, potentially due to lower-quality in-shell pecans being exported as stock levels diminished toward the end of the year.



Source: South African Revenue Service, 2024 (SARS)

- k) The highest weekly in-shell export volumes occurred between Week 30 and Week 35. Prices remained relatively stable throughout the year, except for a sharp decline starting after Week 45.

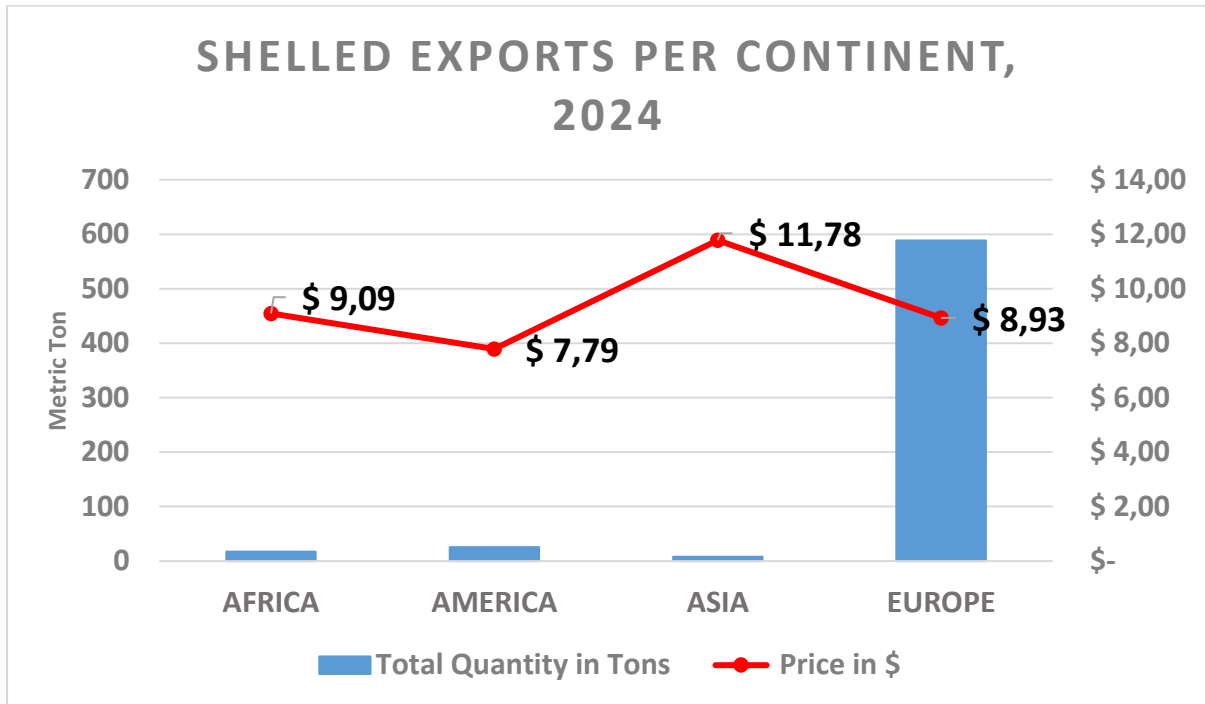
IN-SHELL EXPORTS SIZE DISTRIBUTION, 2022 vs 2023 vs 2024



Source: South African Pecan Nut Producers Association (SAPPA)

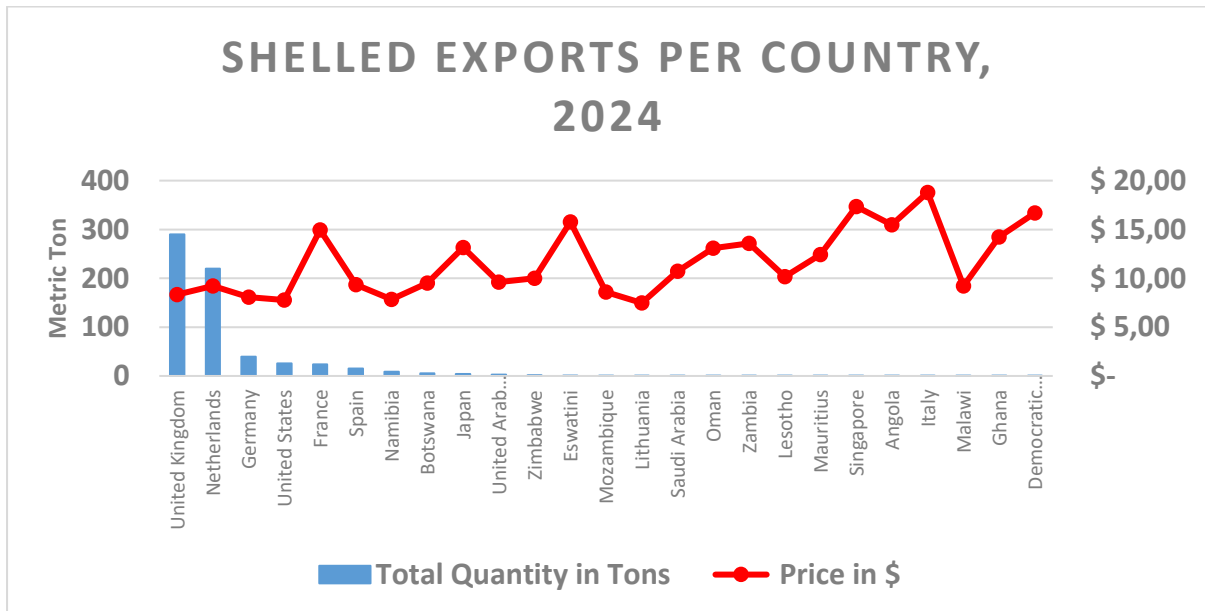
- l) The graph shows the size distribution of South African in-shell pecan exports from 2022 to 2024. There has been a decrease in the export percentage of small, medium, and large-sized pecans, while exports of oversize and jumbo pecans have increased. This shift in size distribution may be influenced by various factors, including climatic conditions and the increasing production from younger trees.

2.2. Shelled



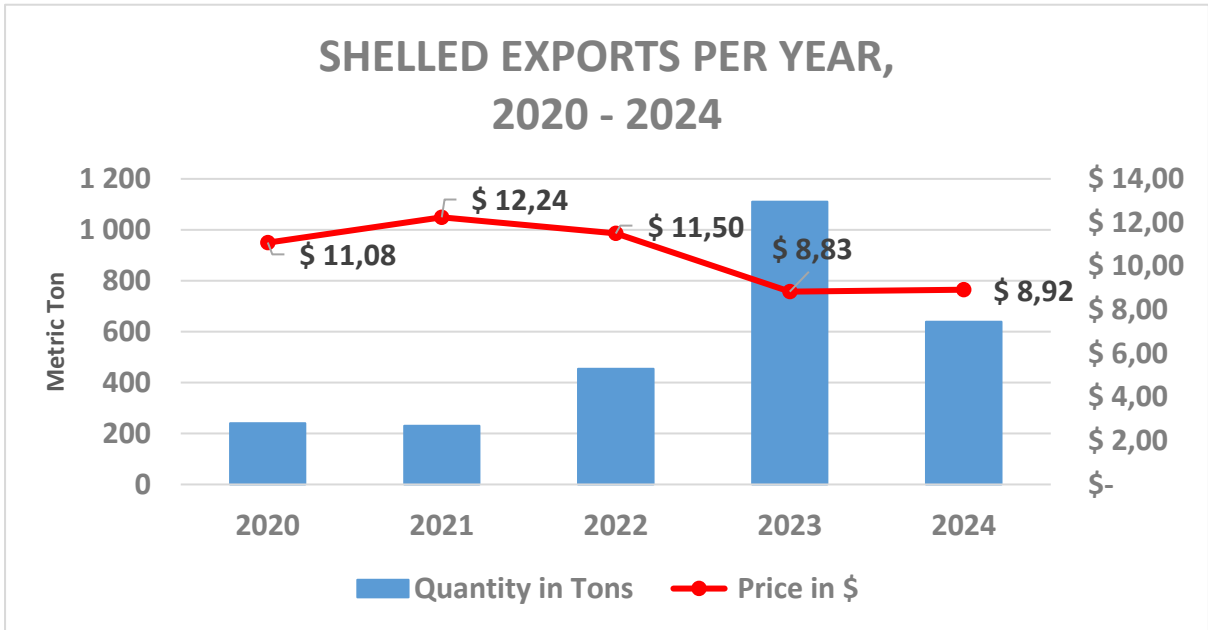
Source: South African Revenue Service, 2024 (SARS)

- m) The graph above illustrates the distribution of shelled pecan exports from South Africa to various continents, including halves and pieces. Europe emerges as the dominant market, importing 588 metric tons in 2024, which represents 92% of the total shelled pecan exports.



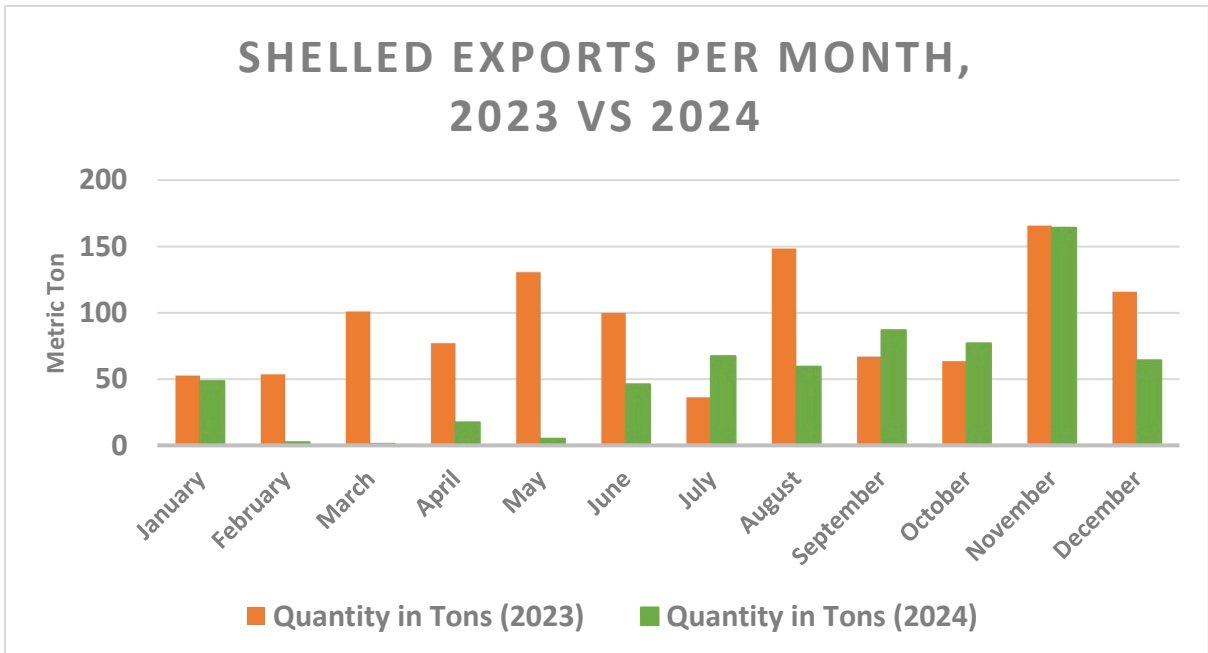
Source: South African Revenue Service, 2024 (SARS)

- n) South Africa's shelled pecan exports were firmly rooted in the European market, with the top three importers in 2024 being the U.K. (290 metric tons), the Netherlands (220 metric tons), and Germany (40 metric tons).



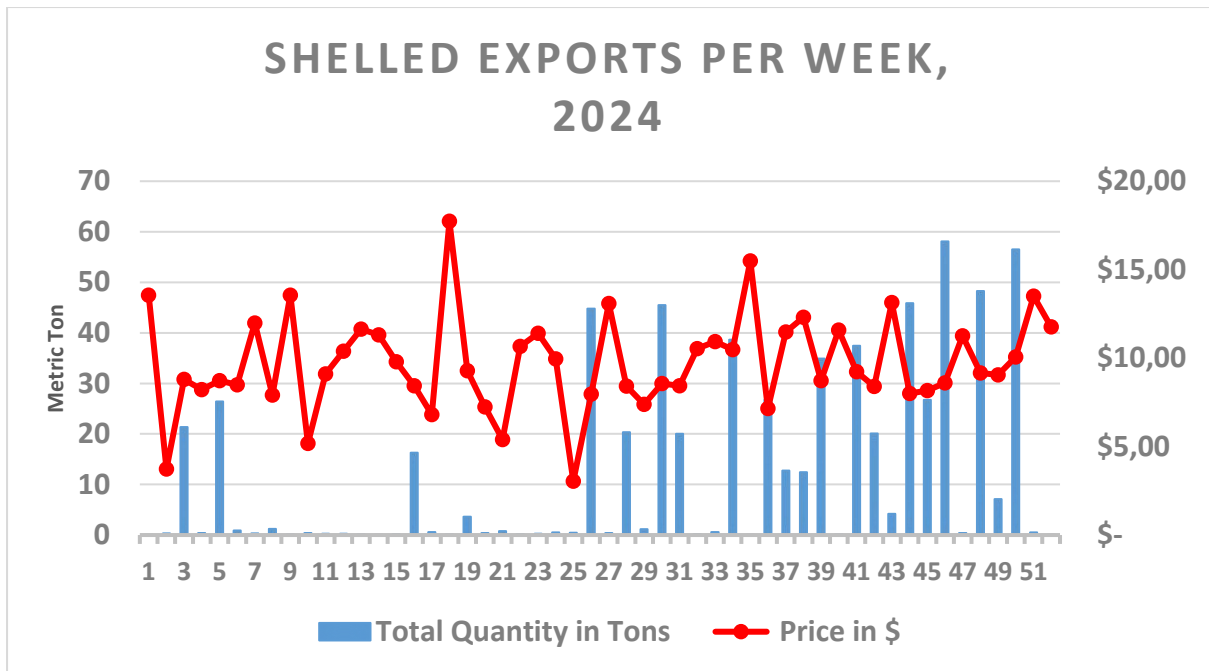
Source: South African Revenue Service, 2024 (SARS)

- o) South Africa's shelled pecan exports are demonstrating a growing trend, accompanied by stabilizing prices. In 2024, total shelled exports reached 640 metric tons, compared to 1,111 metric tons in 2023. Since shelled pecans are exported year-round, a significant portion of the 2024 harvest is expected to be exported in 2025.



Source: South African Revenue Service, 2024 (SARS)

- p) The chart shows that monthly shelled pecan exports remained low during the first half of 2024 but began to increase steadily from June onwards.



Source: South African Revenue Service, 2024 (SARS)

- q) This graph presents South African shelled pecan exports on a weekly basis. The highest export volume occurred in Week 46, with 58 metric tons, followed closely by 56 metric tons in Week 50. While these volumes remain modest compared to those of the U.S., the export of shelled pecans has shown growth in recent years.

SAPPA would like to extend our gratitude to all those who contribute valuable information, enabling the growth of the industry, with special thanks to our producers, processors and nurseries.