

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Greece

Post: Rome

Greece - Cyprus Tree Nuts Annual 2011

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 2011/12 Greek almond production is forecast to decrease slightly due to heavy frost in December and adverse conditions in March that damaged the crop in the main producing areas. The United States is the main supplier almonds and pistachios to the Greek and Cypriot markets.

GREECE

Almonds

Table 1: Production, Supply and Demand (MT)

Almonds, Shelled Basis	2009	2010	2011
	Estimates 2009/2010	Estimates 2010/2011	Forecast 2011/2012
	Post Data	Post Data	Post Data
Area Planted	40,000	40,000	40,000
Area Harvested	38,000	38,000	37,000
Production	14,000	12,000	10,000
Imports	8,015	6,596	6,500
Total Supply	22,015	18,596	16,500
Exports	2,019	1,531	1,600
Domestic Consumption	19,996	17,065	14,900
Total Distribution	22,015	18,596	16,500

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, which yield about 1,200 MT annually that is mostly for own 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 is replacing many traditional ones.

MY 2011/12 Greek almond production is forecast to decrease slightly due to heavy frost in December and adverse conditions in March that damaged the crop in the main producing areas.

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. Greek almond consumption is trending downward as a consequence of decreased production and imports. 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 70 percent of total imports. Spain also is an important supplier to the Greek market, accounting for 27 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 Germany.

Greek authorities have intensified aflatoxin controls on tree nuts, both in the wholesale and retail market chains. The National Chemical Laboratory found several almonds and pistachios samples contained aflatoxin in excess of EU limits (EU Commission Regulation N. 165/2010), withdrew the products from the market, and fined the importers and retailers.

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

Pistachios

Table 2: Production, Supply and Demand (MT)

Pistachios, In-shell Basis	2009	2010	2011
	Estimates 2009/2010	Estimates 2010/2011	Forecast 2011/2012
	Post Data	Post Data	Post Data
Area Planted	5,122	4900	4900
Area Harvested	5,122	4900	4900
Beginning Stocks	560	460	405
Production	2,500	3,000	3,150
Imports	2,671	1,200	1,235
Total Supply	5,731	4,660	4,790
Exports	1,201	764	800
Domestic Consumption	4,070	3,491	3,600
Ending Stocks	460	405	390
Total Distribution	5,731	4,660	4,790

Source: Unofficial estimates based on Greek industry contacts; GTA

PRODUCTION

According to industry estimates, MY 2011/12 Greek pistachio production is forecast to remain steady. Greek pistachios are produced mainly in the Island of Egina and in the area of Lamia, located in central Greece. Due to its exceptional flavor, shapely form, and full kernel, the Aegina pistachio has been awarded by the European Commission as a PDO (Protected Designation of Origin), distinguishing it from all other pistachio varieties worldwide.

CONSUMPTION

MY 2011/12 Greek pistachio demand is forecast to remain stable. 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 (78 percent), Germany, and France. Imported pistachios are destined for the confectionary and ice cream sectors. Greece is an emerging exporter. France, Cyprus, and Bulgaria represent the main destination for Greek pistachios.

CYPRUS

Almonds

Table 3: Production, Supply and, Demand (MT)

Almonds, Shelled Basis	2009	2010	2011
	Estimates 2009/2010	Estimates 2010/2011	Forecast 2011/2012
	Post Data	Post Data	Post Data
Area Planted	3,550	4,157	4,157
Area Harvested	3,550	4,157	4,157
Production	68	550	550
Imports	904	888	870
Total Supply	972	1,438	1,420
Exports	0	0	0
Domestic Consumption	972	1,438	1,420
Total Distribution	972	1,438	1,420

Source: Unofficial estimates based on industry contacts; GTA

According to unofficial estimates, there are approximately 4,157 hectares of almonds in Cyprus, including all types of systematically cultivated orchards and a large number of scattered trees. The main producing areas are the villages of Limnatis and Moniatis, located in southern Cyprus. MY 2011/12 Cypriot almond production and consumption are forecast to remain flat at MY 2010/11 levels. Cypriot almond demand is mostly satisfied by imports from the United States and Iran.

Pistachios

Table 4: Production, Supply and, Demand (MT)

	2009	2010	2011

Pistachios, Inshell Basis	Estimates 2009/2010	Estimates 2010/2011	Forecast 2011/2012
	Post Data	Post Data	Post Data
Area Planted	110	115	115
Area Harvested	110	115	115
Production	25	40	45
Imports	382	398	387
Total Supply	407	438	432
Exports	40	20	25
Domestic Consumption	367	418	407
Total Distribution	407	438	432

Source: Unofficial estimates based on industry contacts; GTA

MY 2011/2012 Cypriot pistachio production is small and forecast to remain stable. The main producing area is Korfi, a village located in southern Cyprus. Like with almonds, pistachio demand is satisfied mainly by imports from the United States and Iran. Pistachio imports are not only for domestic consumption, but also for the processing and re-export market, mainly China.

Abbreviations and Definitions Used in this Report

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

Almonds: 3.3

Pistachios: 1.5

HS Codes:

Almonds: Shelled 080212; In-shell 080211

Pistachios: 080250

Ha hectare; 1 ha = 2.471 acres

MT Metric ton = 1,000 kg

MS EU member state(s)

MY Marketing Year

Almonds and Pistachios: September/August