



SAPPA

SOUTH AFRICAN PECAN NUT
PRODUCERS ASSOCIATION NPC

PECANOMICS

South African Pecan Industry Overview 2025

SOUTH AFRICA'S PECAN INDUSTRY AT A GLANCE

South Africa's pecan industry has grown from a niche activity into an important, export-focused sector. Expansion in planted area and production over the past decade has strengthened South Africa's position in global pecan markets.

Pecan farming is a long-term investment. A pecan tree may take seven years or more to reach meaningful production, making early orchard decisions critical to long-run performance.

As the industry expanded, shared standards and coordination became more important. SAPPa supports the pecan value chain through research, technical guidance, market development, industry data and transformation.

Today, most South African pecans are exported, with a large share sold into a single market. While this has supported growth, it also highlights the need for diversification and consistent quality to ensure long-term stability.



These statistics are derived from the South African Revenue Service (SARS), South Africa's Official Perishable Produce Export Certification Agency (PPECB) and collected by SAPPa from processors and nurseries.

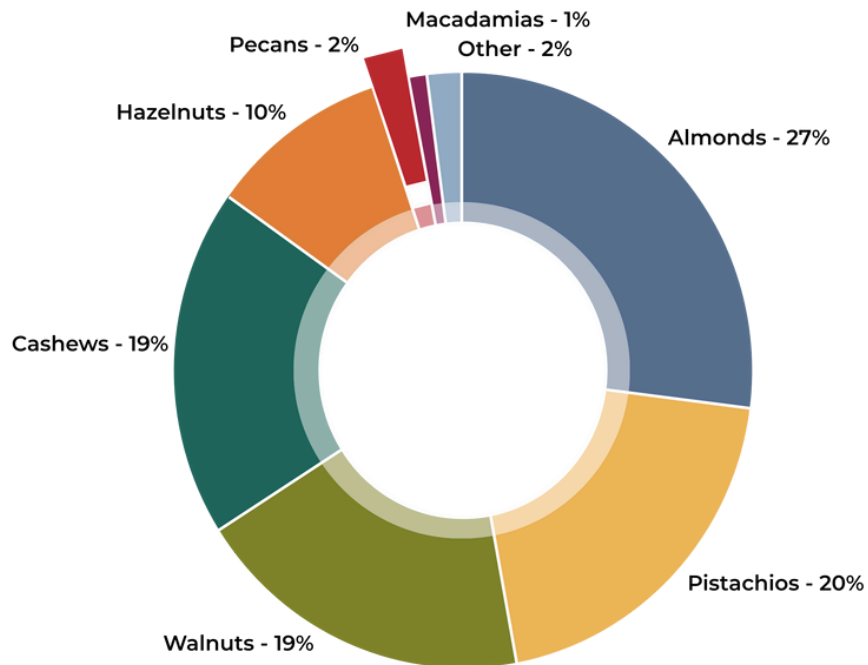
Disclaimer: All USD (\$) prices are based on average USD/Rand Exchange Rates for the specific year mentioned.

PART 1: PECAN PRODUCTION

GLOBAL AND SOUTH AFRICAN

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.

WORLD TREE NUT PRODUCTION 2024/2025



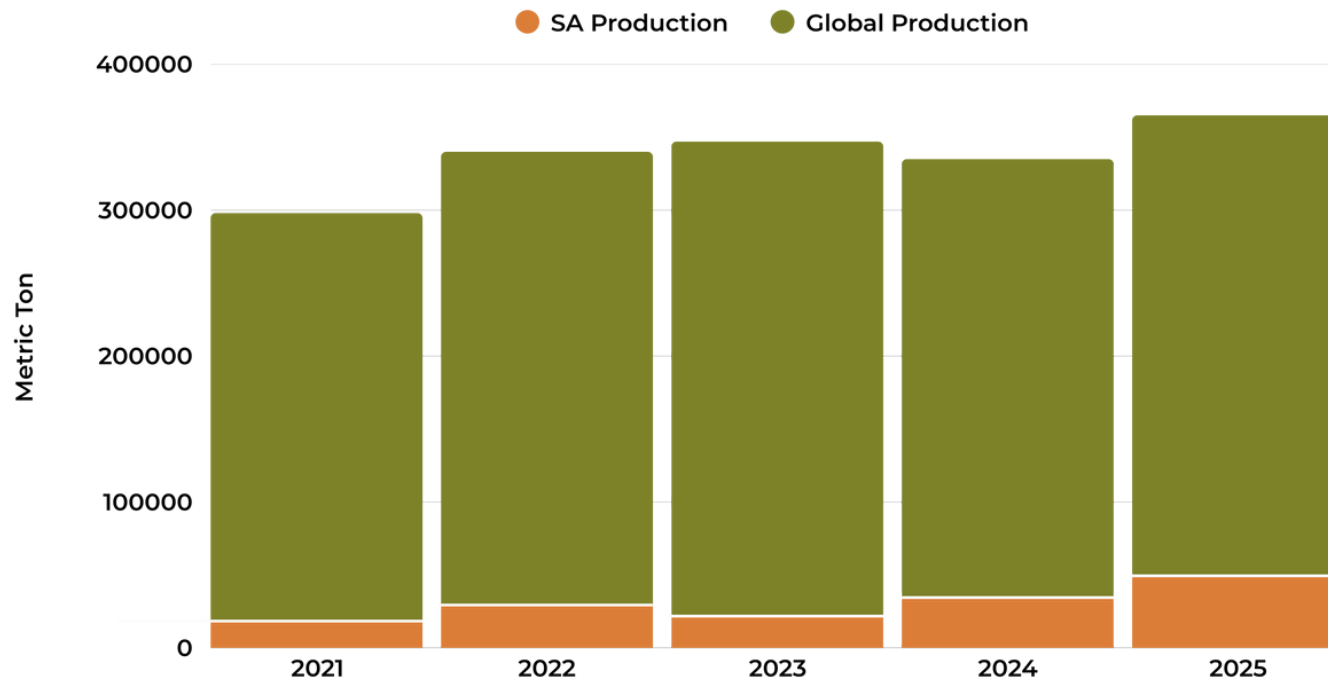
Source: International Nut Council (INC); Statistical Yearbook 2025

Pecans account for approximately 2% of global tree nut production in the 2024/2025 season, compared with dominant crops such as almonds (27%) and pistachios (20%).

Despite their relatively small global share, South Africa's pecan production has expanded more rapidly than overall global growth, resulting in a rapid increase in the country's global market share over a relatively short period.



GLOBAL VS SA PECAN PRODUCTION 2021 - 2025



Source: International Nut Council (INC); Statistical Yearbook 2025 & South African Pecan Nut Producers Association (SAPPA)

While global pecan production has increased only gradually over the period, South Africa's output has expanded at a materially faster pace.

Between 2021 and 2025*, global pecan production fluctuated, increasing from 282,351 metric tons in 2021 to a peak of 310,339 metric tons in 2023, before easing slightly to an estimated 299,440 metric tons in 2025.

Over the same period, South African pecan production followed a clear upward trend. South Africa's share of global production increased from 7% in 2021 to 10% in 2022, dipping temporarily in 2023, and then increasing significantly to 12% in 2024 and an estimated 16% in 2025*.

**INCREASED GLOBAL SHARE
FROM 7% TO 16% IN FIVE YEARS**

This highlights South Africa's growing importance in global pecan supply despite variability in total global output.

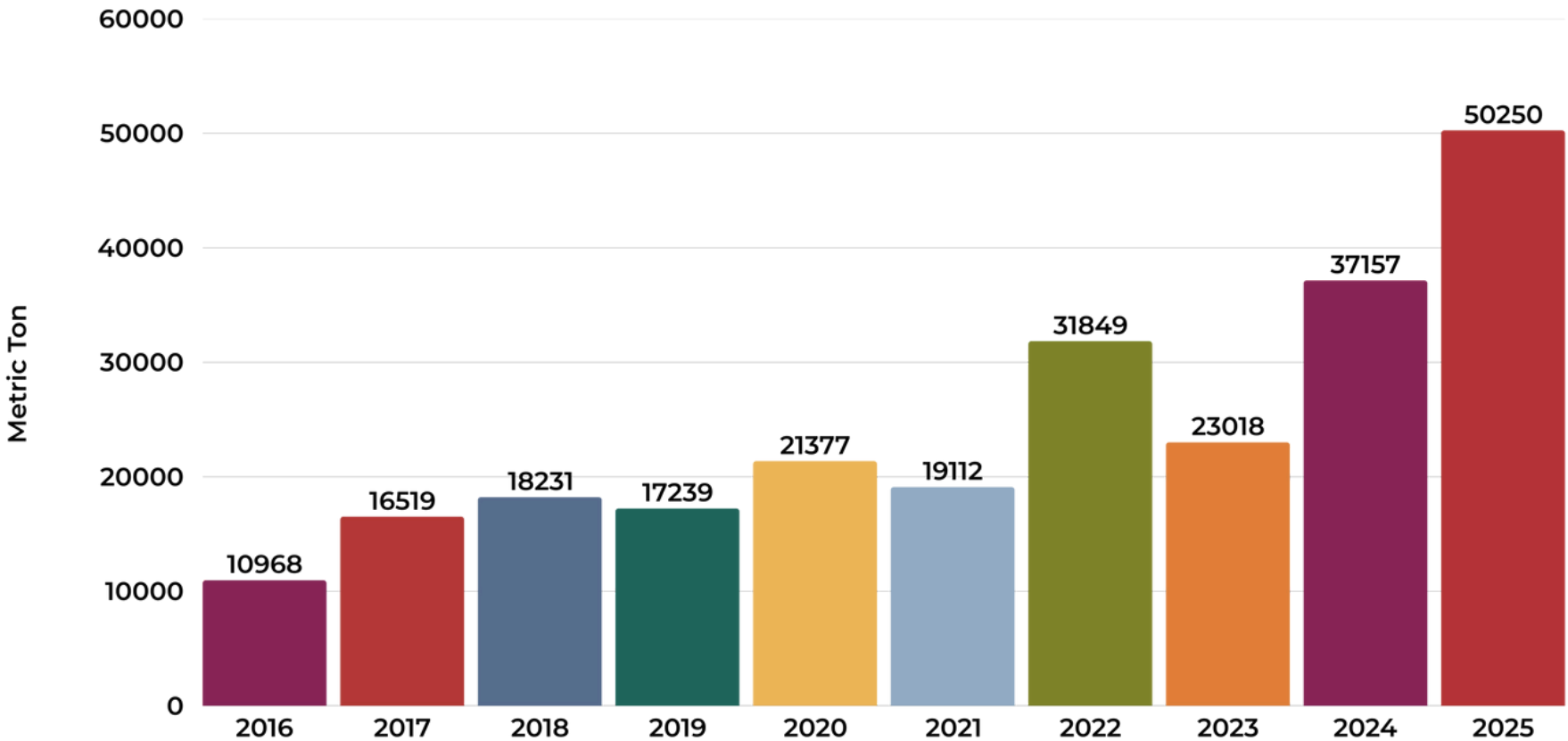


South African pecan production has increased more than four-fold over the past decade. As production rose from 10,968 metric tons in 2016 to 18,231 metric tons in 2018, followed by moderate fluctuations between 2019 and 2021. From 2022 onwards, output expanded more rapidly, increasing from 31,849 metric tons in 2022 to 37,157 metric tons in 2024, with a further rise to 50,250 metric tons in 2025.

While continued fluctuation remains clear, the overall trend reflects sustained orchard maturation and continued investment across the sector.

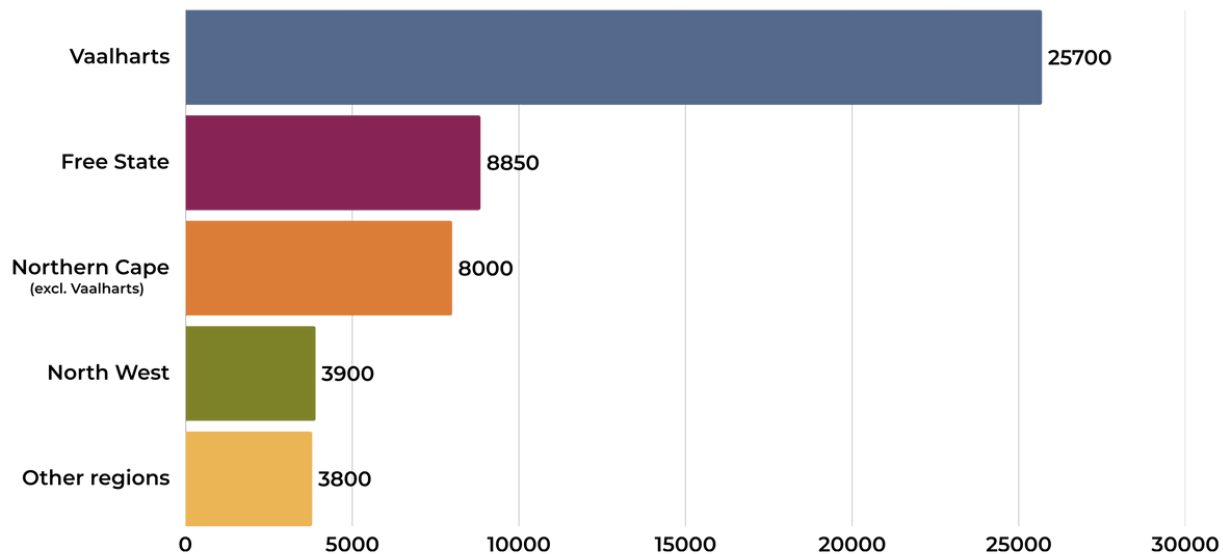
50 250
TONS PRODUCED - 2025

SOUTH AFRICAN PECAN PRODUCTION 2016 - 2025



Source: South African Pecan Nut Producers Association (SAPPA)

SOUTH AFRICAN PECAN PRODUCTION 2025



Source: South African Pecan Nut Producers Association (SAPPA)



LARGEST PRODUCING REGION

25 700

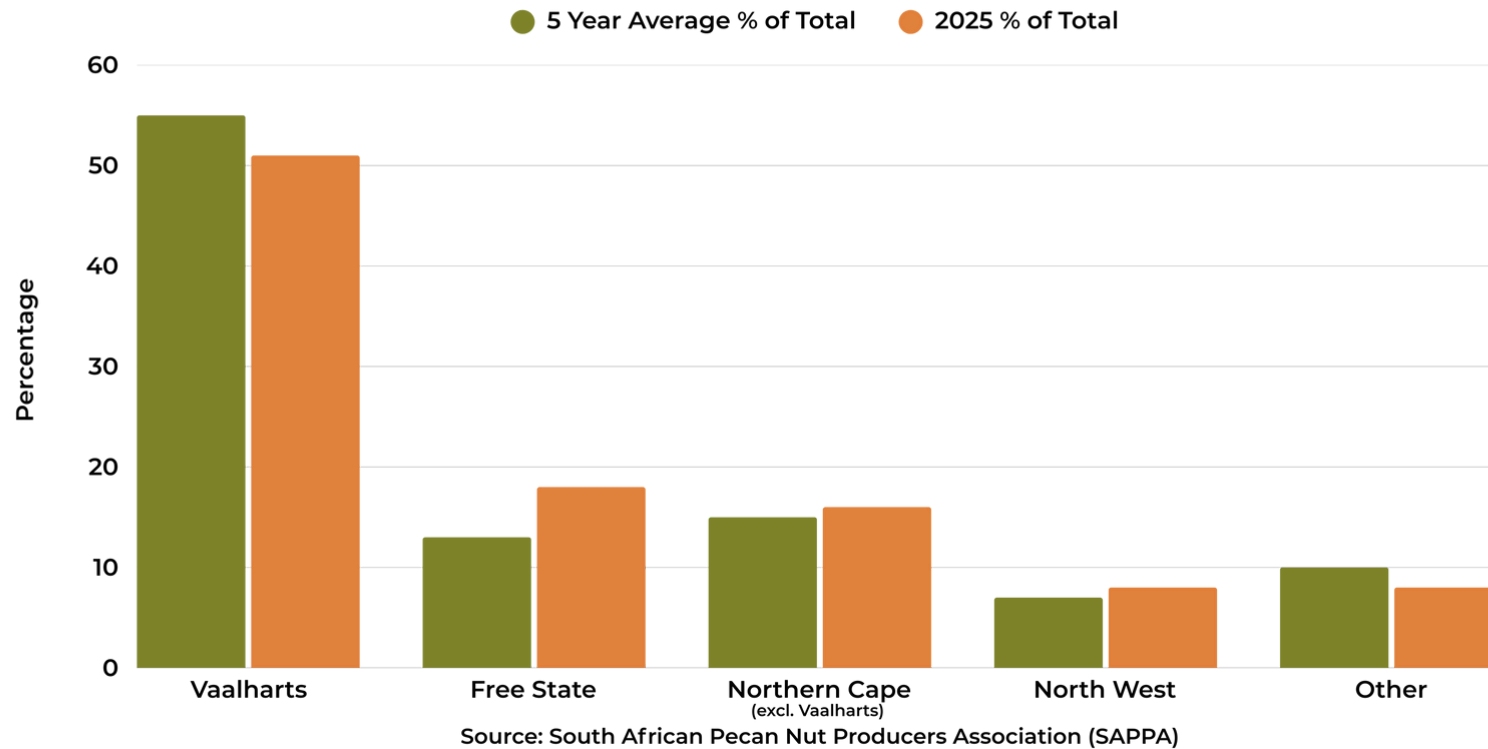
TONS PRODUCED BY VAALHARTS

South African pecan production is highly concentrated geographically. A small number of core production regions account for the majority of national output.

In the 2025 season, Vaalharts is the largest pecan-producing region, contributing approximately 25,700 tons and representing more than half of South Africa's total production.



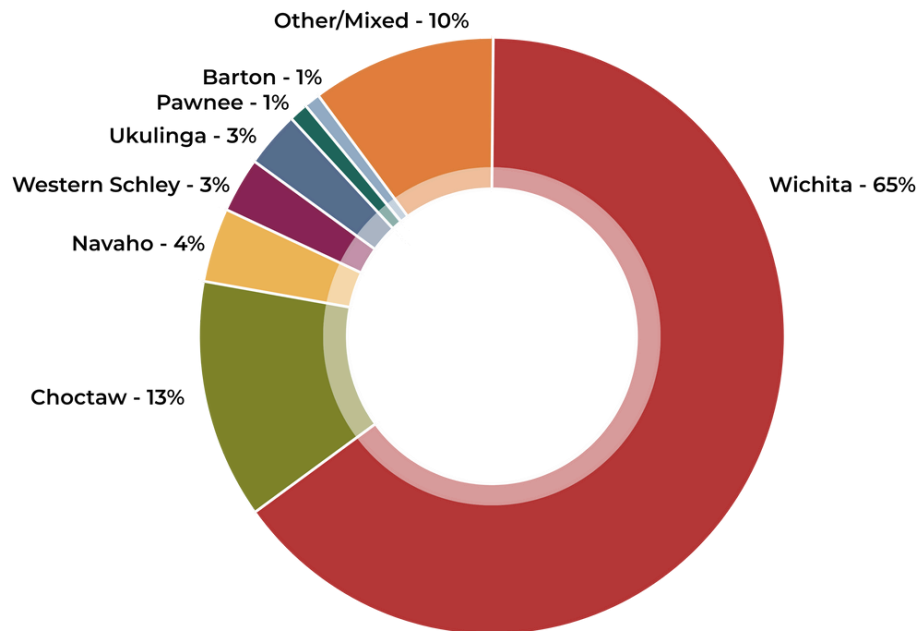
PRODUCTION PER AREA: 5-YEAR AVERAGE VS 2025 SEASON



While Vaalharts remains South Africa's leading pecan-producing region, its relative share has declined compared with the five-year average. The chart compares regional production shares for the 2020–2024 average and the 2025 season.

Vaalharts' contribution decreases from approximately 55% over the five-year period to about 51% in 2025. Over the same period, the Free State records a notable increase, rising from around 13% to 18% of total production. The Northern Cape (excluding Vaalharts) also shows modest growth, increasing from roughly 15% to 16%. Production in the North West remains relatively stable, edging up from 7% to 8%, while the combined share of other regions declines from approximately 10% to 8%.

PRODUCTION BY CULTIVAR: PERCENTAGE OF TOTAL OUTPUT (2025)



Source: South African Pecan Nut Producers Association (SAPPA)



South African pecan production remains heavily concentrated in a single cultivar. The chart illustrates the cultivar composition for the 2025 season, with Wichita accounting for approximately 65% of total production.

Choctaw follows at around 13%, while Navaho and Western Schley contribute 4% and 3%, respectively. Ukulinga represents roughly 3% of output, with Pawnee and Barton each accounting for about 1%. The remaining 10% consists of other and mixed cultivars.

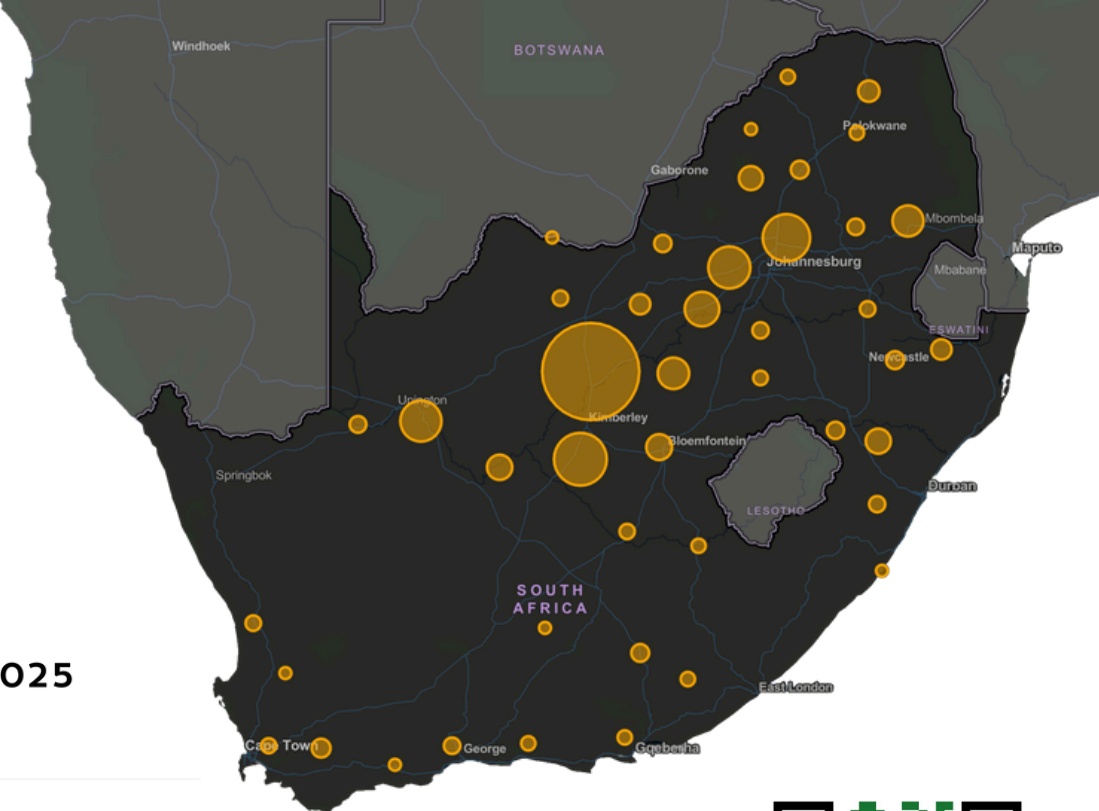
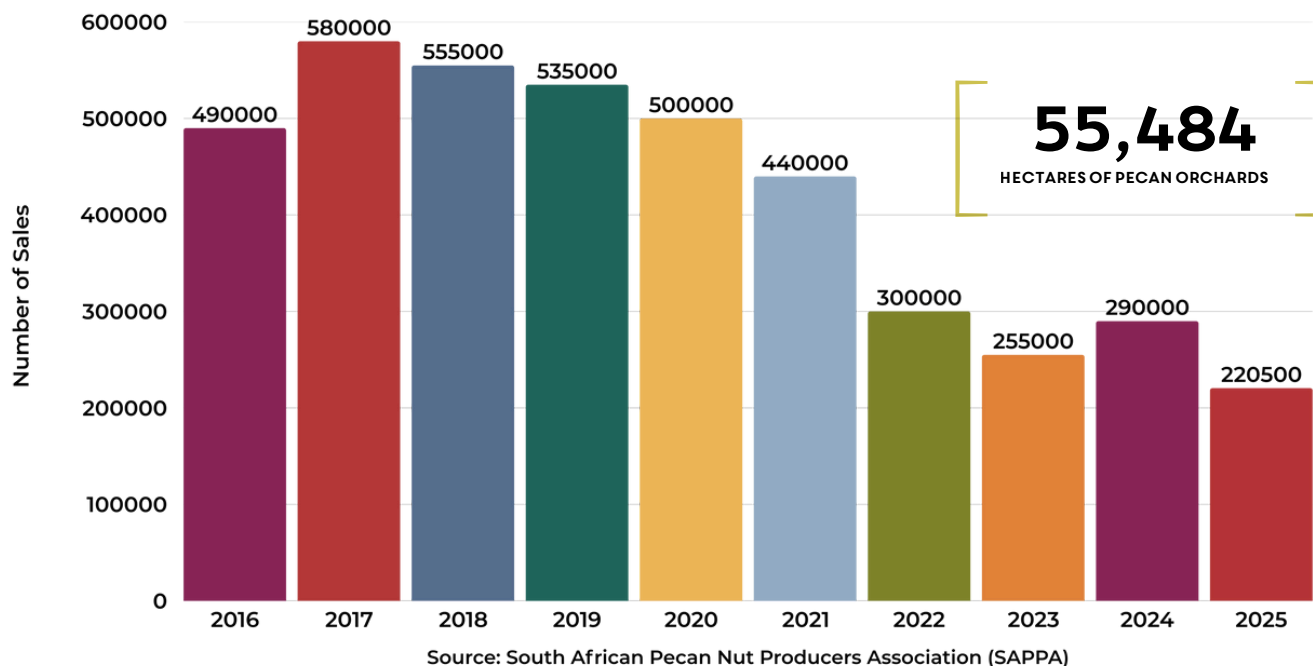
BIGGEST CULTIVAR
WICHITA
65% OF TOTAL PRODUCTION

Tree sales provide a forward-looking indicator of orchard expansion and future production potential. Tree sales increased from 490,000 in 2016 to a peak of 580,000 in 2017, before gradually declining to 500,000 in 2020 and 440,000 in 2021.

A sharper contraction is evident from 2022 onwards, with sales dropping to 300,000 in 2022 and reaching a low of 255,000 trees in 2023.

This was followed by a modest recovery to 290,000 trees in 2024, before declining again to 220,500 trees in 2025.

SOUTH AFRICAN PECAN NUT TREE SALES 2016 - 2025



QR CODE FOR THE INTERACTIVE, DETAILED AARSC MAP:

By 2024, the AARSC completed the South African Pecan Orchards Map, identifying a total of 55,484 hectares of pecan orchards.

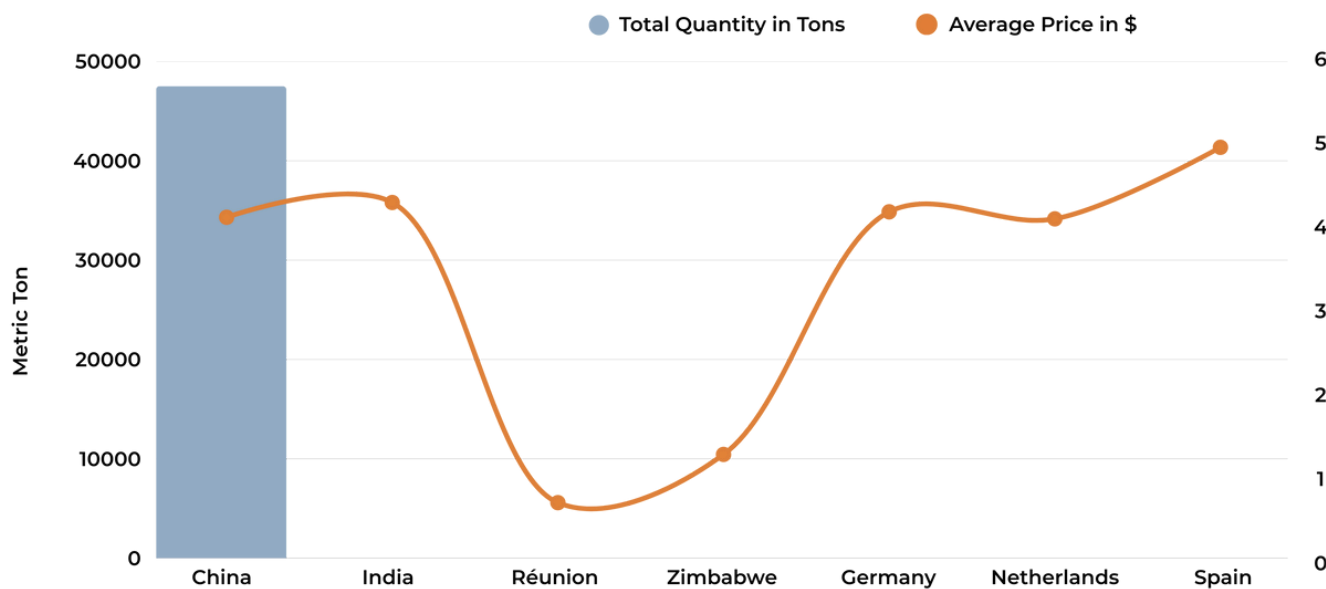
The map includes orchards larger than 1 hectare and trees older than approximately one year at the time of data collection.

PART 2: PECAN EXPORTS

SOUTH AFRICAN IN-SHELL EXPORTS

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

IN- SHELL EXPORTS PER COUNTRY 2025



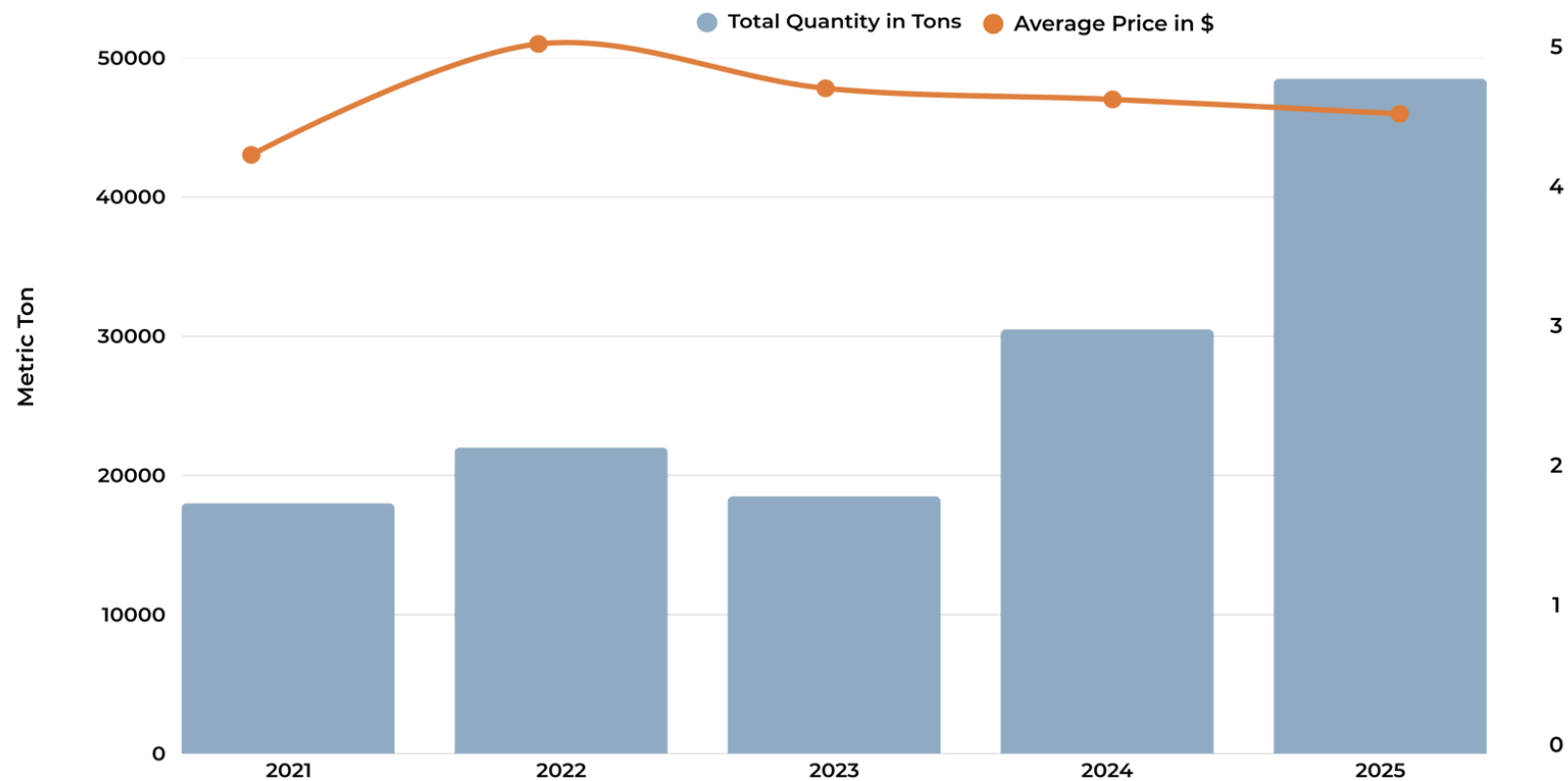
Source: South African Revenue Service, 2025 (SARS)

South Africa's in-shell pecan exports are highly concentrated in a single market. In 2025, China imported 47,597 metric tons, accounting for 99.3% of the total in-shell pecan export market.





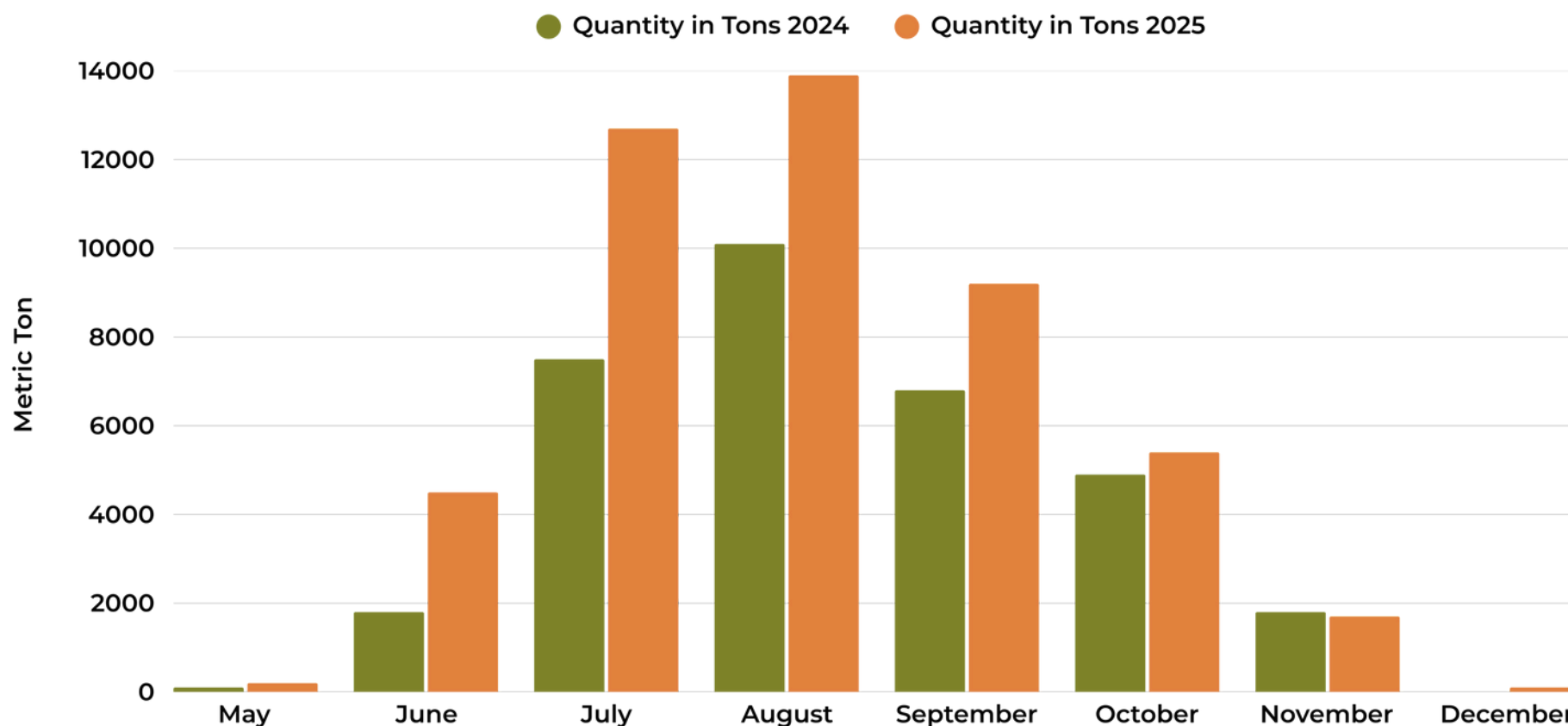
IN- SHELL EXPORTS PER YEAR 2021 - 2025



Source: South African Revenue Service, 2025 (SARS)

After a decline in 2023, South Africa's in-shell pecan export volumes rebounded sharply in 2025. The chart shows export volumes rising strongly from 2024 to 2025, reaching nearly 50,000 metric tons. Average prices peaked in 2022, declined in subsequent years, and appear to have stabilised at around USD 4.37 per kilogram in 2025.

IN- SHELL EXPORTS PER MONTH 2024 VS 2025

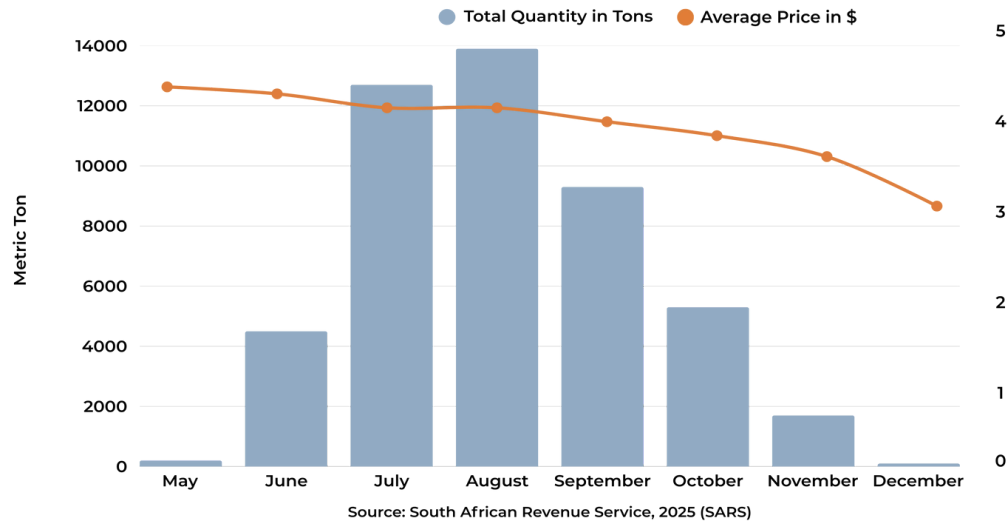


Source: South African Revenue Service, 2025 (SARS)

South African in-shell pecan exports follow a clear seasonal pattern, with shipments peaking between July and September.

The comparison of monthly exports for 2024 and 2025 shows a similar seasonal profile in both years, while export volumes in 2025 consistently exceed those of 2024 throughout most of the season, reflecting higher production levels and expanded processing capacity.

IN-SHELL EXPORTS PER MONTH TO CHINA 2025



South Africa's monthly in-shell pecan exports to China in 2025 show volumes peaking in July and August before tapering off toward year-end.

Average prices decline steadily over the season, falling from around USD 4.74 per kilogram in May to approximately USD 2.99 per kilogram in December.

South Africa supplied the largest volumes to the Chinese market while maintaining competitive price levels.

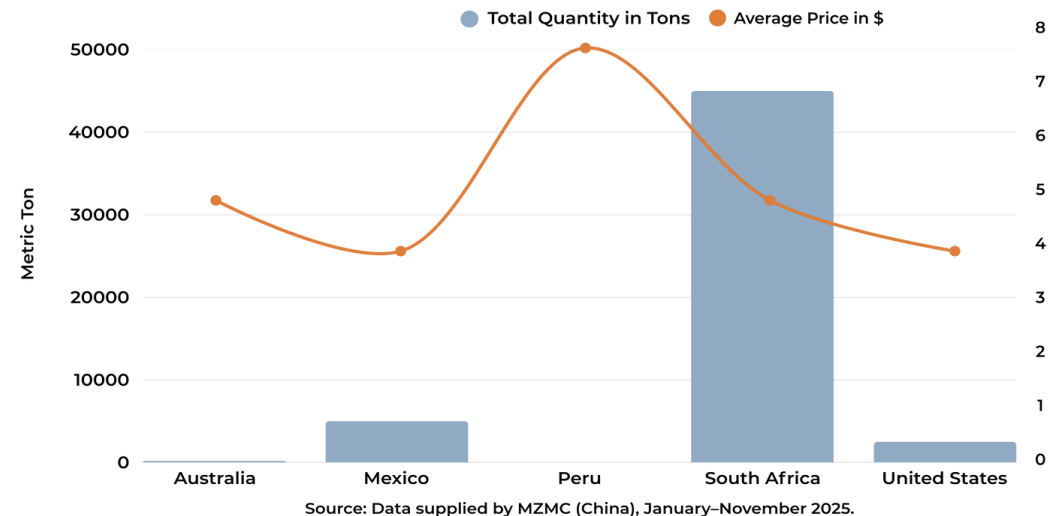
China's in-shell pecan imports from major exporting countries between January and November 2025 are compared by export volumes (tons) and average prices per kilogram.

SOUTH AFRICA SUPPLIED THE LARGEST VOLUMES TO THE CHINESE MARKET WHILE MAINTAINING COMPETITIVE PRICE LEVELS.

Peru achieved the highest average price per kilogram despite lower export volumes, while Australia, the United States, and Mexico supplied smaller volumes at varying price points.

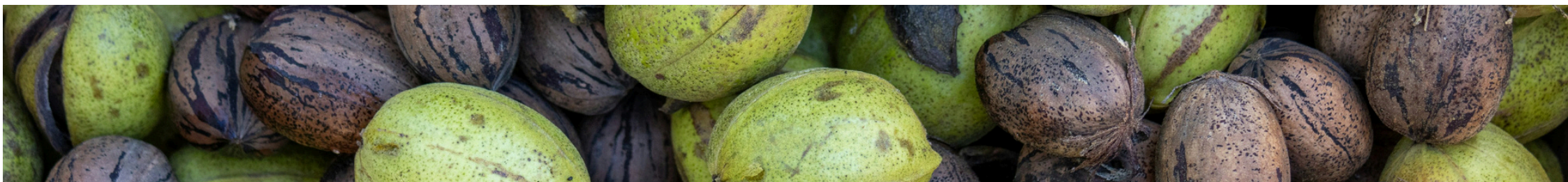
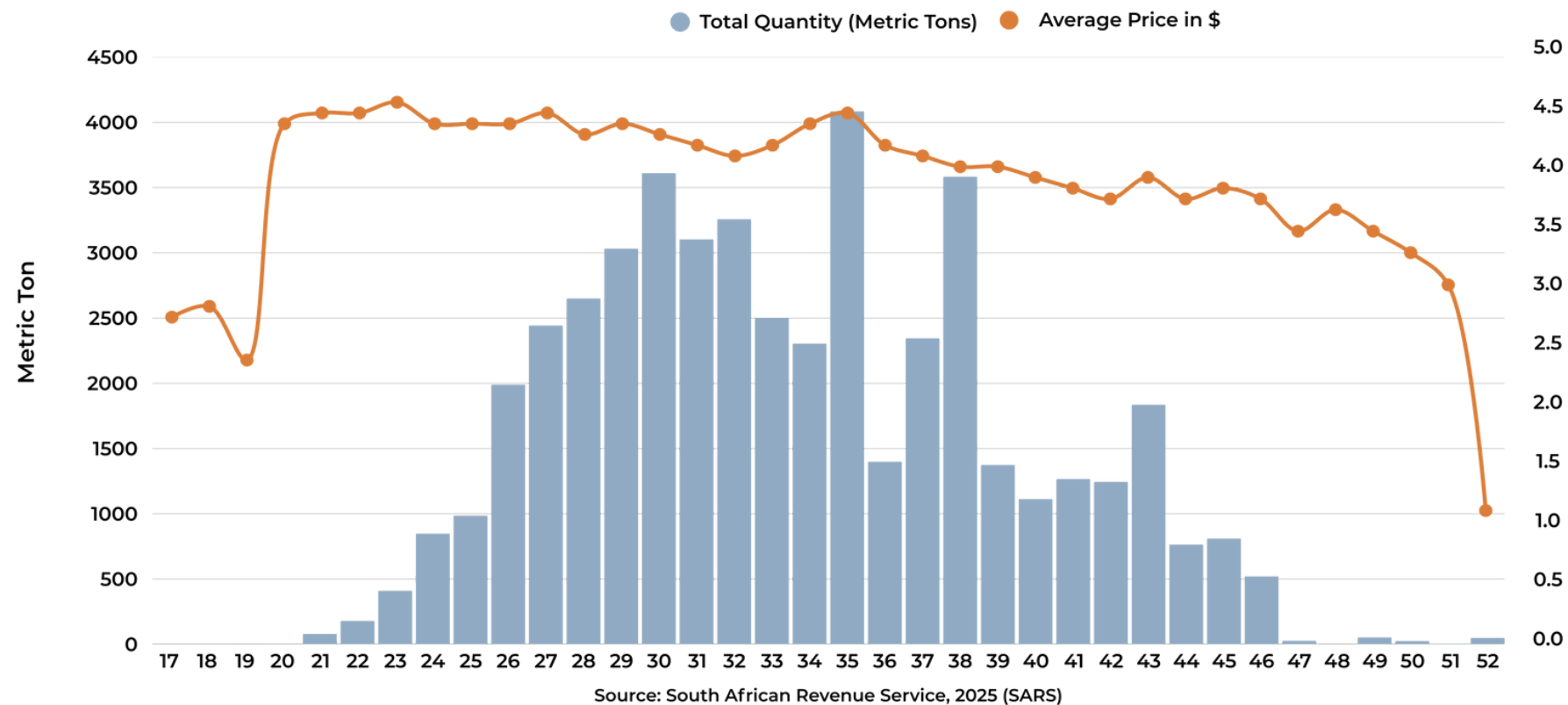
Overall, the comparison highlights clear differences in both export volumes and pricing among major supplying countries.

CHINA'S IN-SHELL PECAN IMPORTS BY ORIGIN AND AVERAGE PRICE (JAN-NOV 2025)



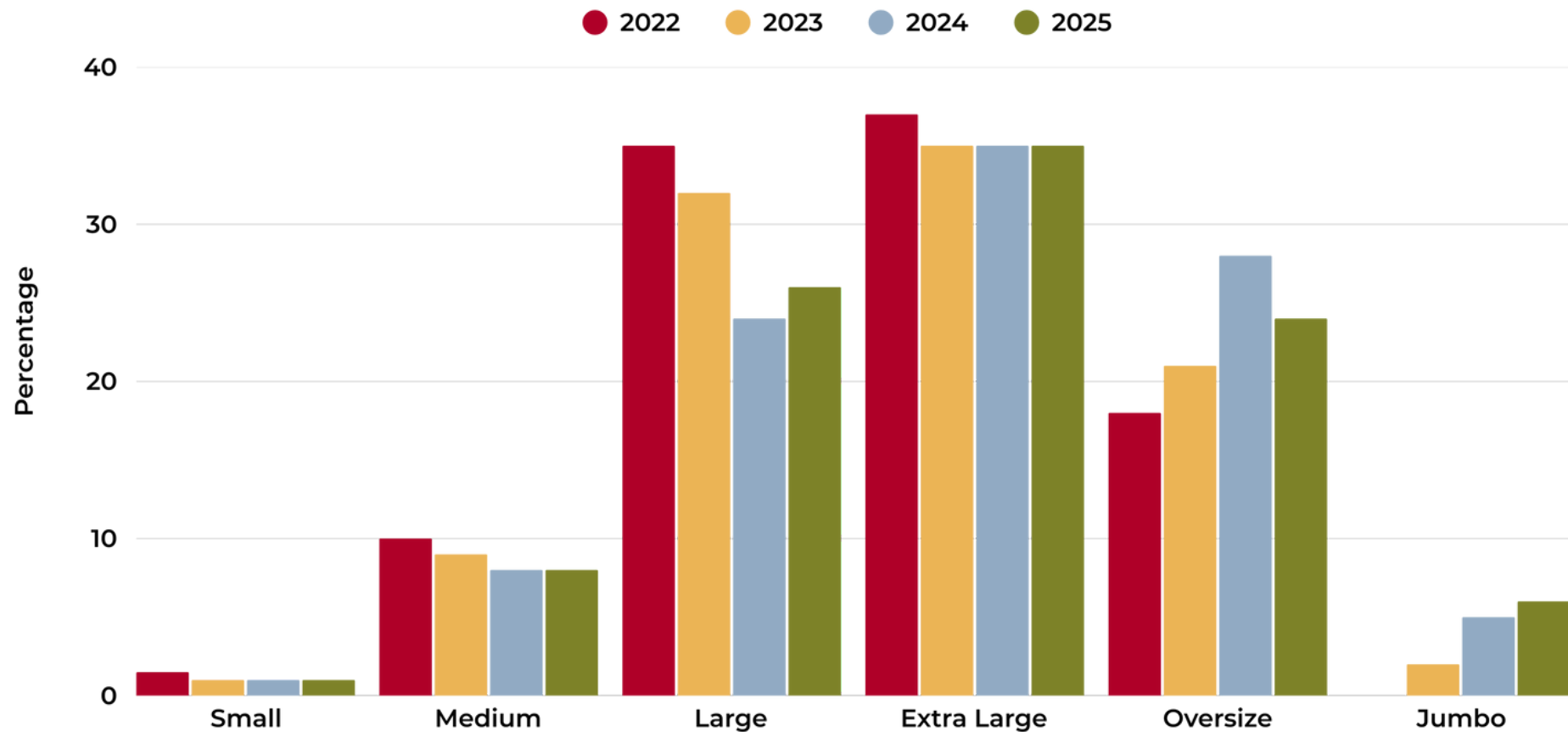
Weekly in-shell pecan export data for 2025 shows volumes peaking between Weeks 30 and 35 before declining toward year-end. Prices remain relatively stable through most of the season, followed by a sharp decline after Week 45.

IN SHELL EXPORTS PER WEEK 2025



South African in-shell pecan exports from 2022 to 2025 are consistently dominated by large and extra-large sizes, with extra-large remaining the single largest category each year. The share of oversize nuts increases from 2022 to a peak in 2024 and remains elevated in 2025, while small sizes remain negligible throughout the period.

IN SHELL EXPORTS DISTRIBUTION 2022 - 2025



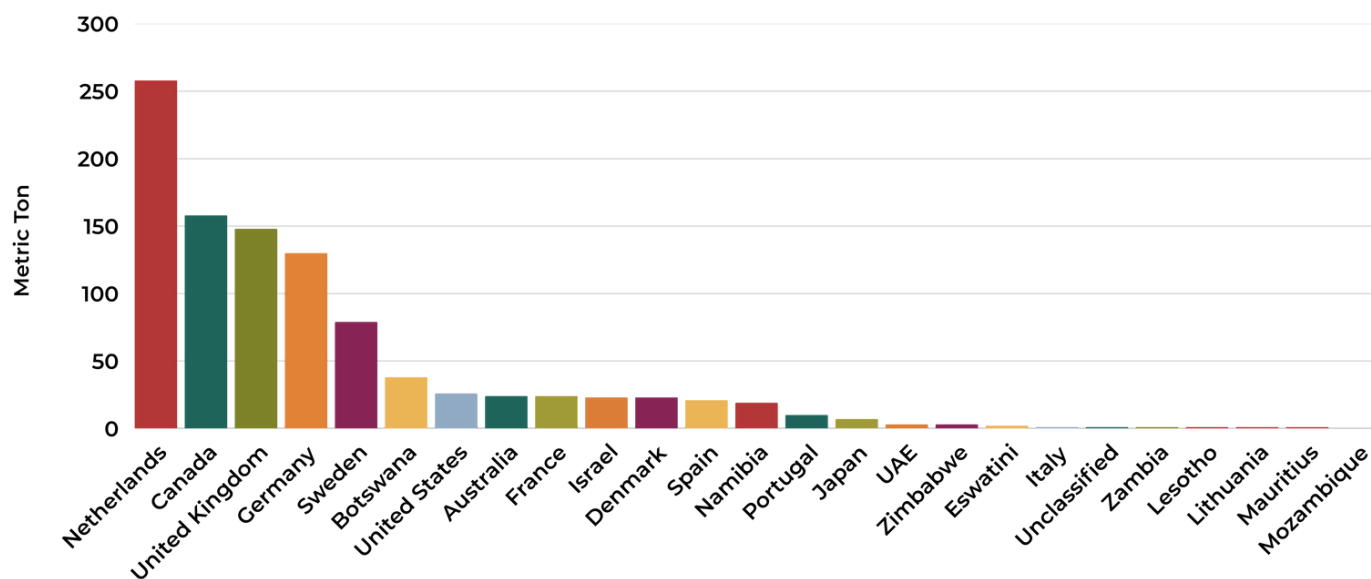
Source: South African Pecan Nut Producers Association (SAPPA)

PART 2: PECAN EXPORTS

SOUTH AFRICAN SHELLED EXPORTS

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

SHELLED EXPORTS PER COUNTRY 2025



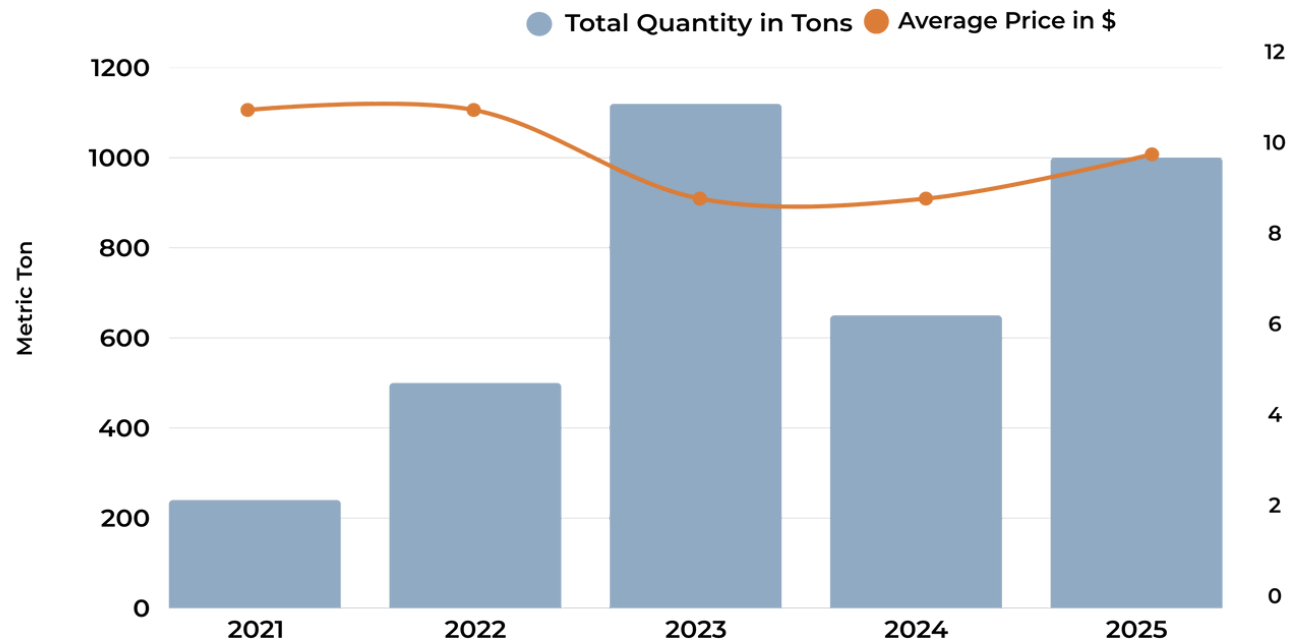
Source: South African Revenue Service, 2025 (SARS)

In 2025, export destinations for South Africa's shelled pecans were concentrated primarily in Europe and Canada. The Netherlands, the United Kingdom, Germany, and Canada accounted for the majority of export volumes, while smaller quantities were distributed across a wide range of other destination markets at varying price levels.





SHELLED EXPORTS PER YEAR 2021 - 2025



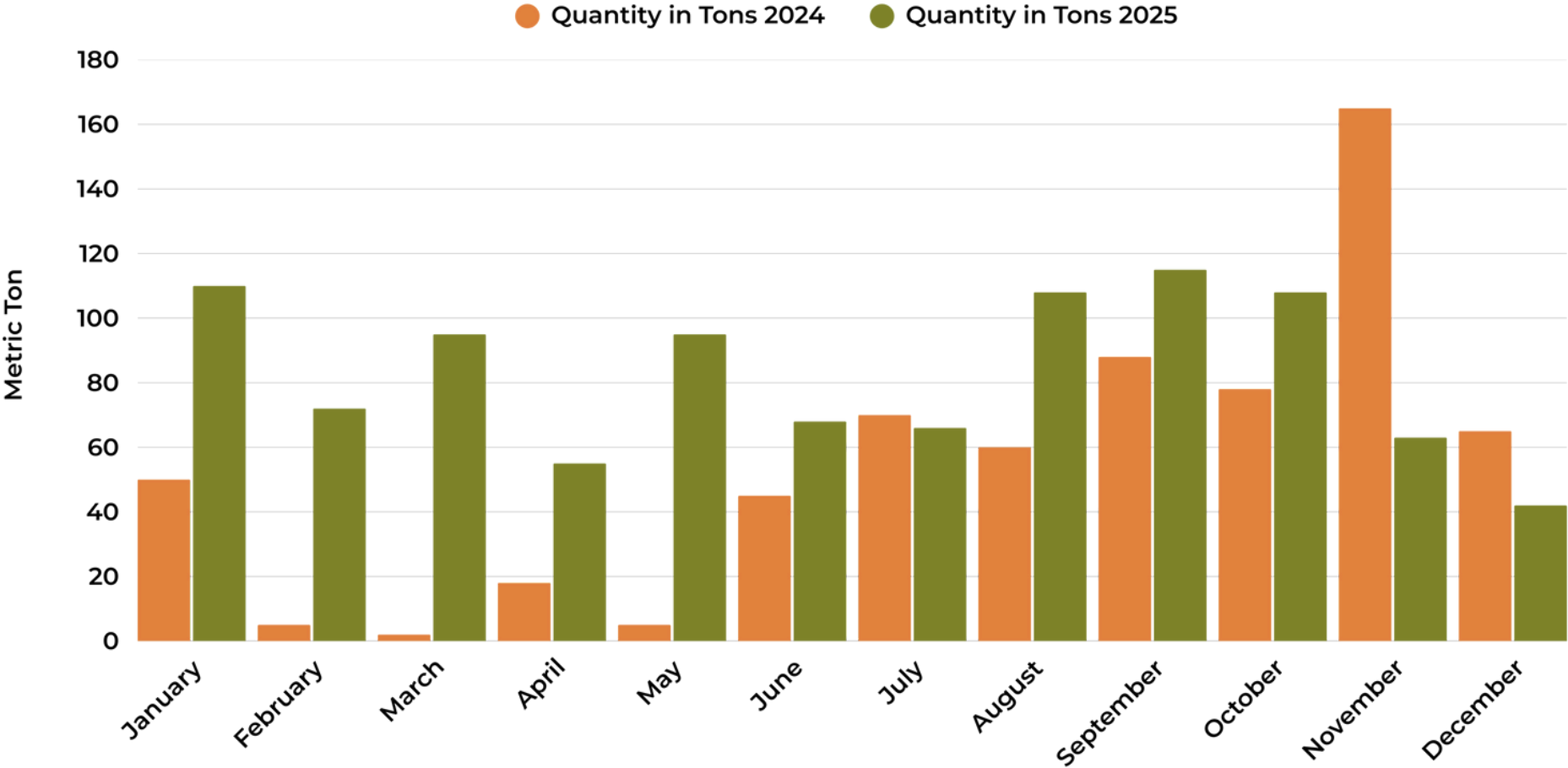
Source: South African Revenue Service, 2025 (SARS)

Over the period from 2021 to 2025, South Africa's shelled pecan exports recorded strong growth in volumes, supported by a recovery in average prices after a decline in 2023.

While 2025 exports remain robust, it is believed that shelled export volumes to the EU could have been higher had it not been for the nickel residue issue, which constrained access to key European markets.



SHELLED EXPORTS PER MONTH 2024 VS 2025

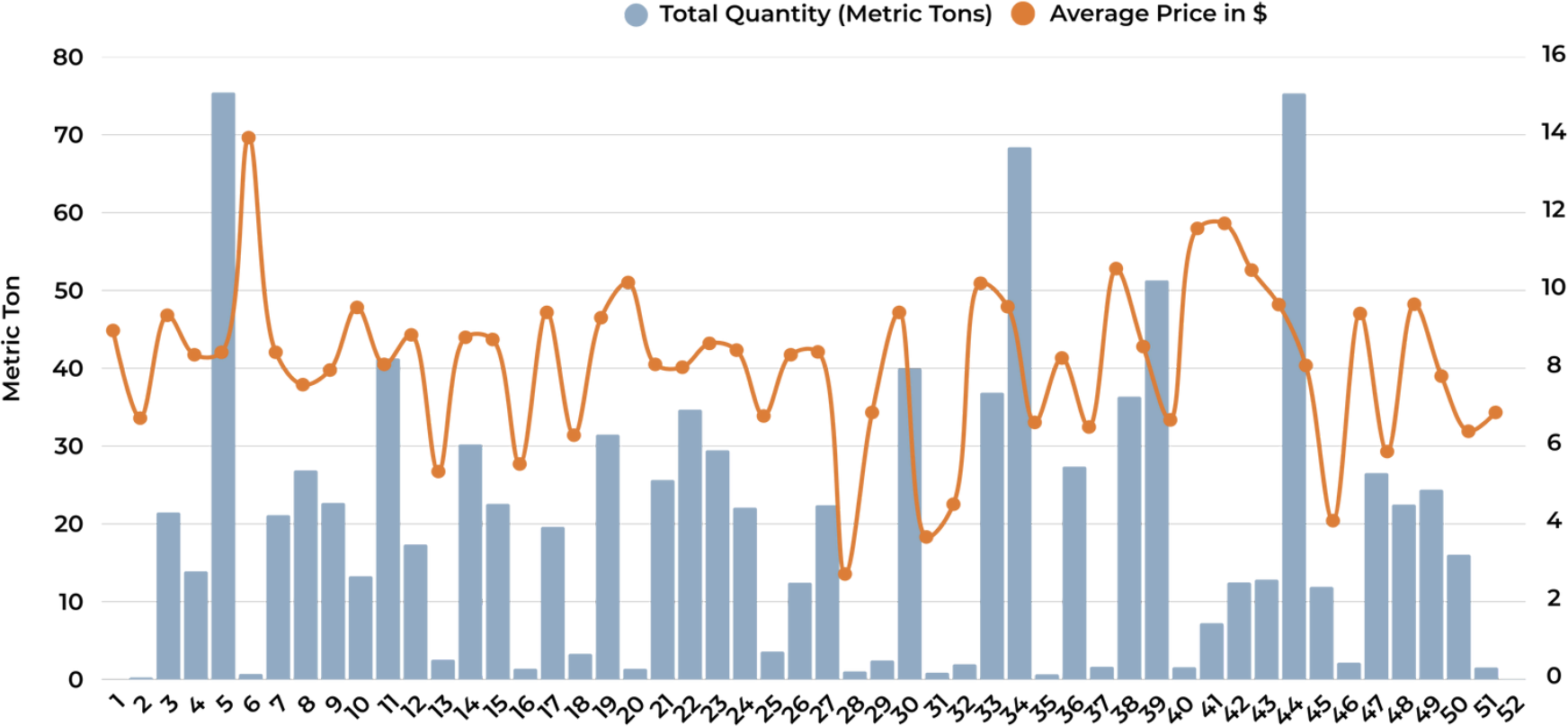


Source: South African Revenue Service, 2025 (SARS)

A comparison of monthly shelled pecan exports in 2024 and 2025 shows relatively low export volumes during the first half of 2024, followed by an increase from mid-year. In contrast, 2025 records consistently higher monthly export volumes, particularly from January through October, before easing toward year-end.



SHELLED EXPORTS PER WEEK 2025



Source: South African Revenue Service, 2025 (SARS)

Weekly data for 2025 shows South Africa’s shelled pecan exports peaking in the latter part of the year, with notable volume spikes around Weeks 5, 34, and 44. Although export volumes remain modest relative to major global producers, shelled pecan exports have continued to grow in recent years. Export potential during the season was constrained by the nickel residue issue, which limited access to key markets and restricted overall volumes.

SHAPING THE NEXT CHAPTER OF THE PECAN INDUSTRY

South Africa's pecan industry stands at a pivotal point in its development. Having successfully scaled production capacity and export volumes, the next phase of growth will be shaped by strategic diversification, improved risk management, and deeper engagement across global markets. How the industry responds to these challenges will be critical in determining its long-term resilience and competitiveness.

Pecan farming is inherently a long-term endeavour, requiring decisions made today to support outcomes many years into the future. Through coordination, research, and industry support, SAPPA has worked to ensure that producers are equipped to navigate this journey, supporting sustainable growth while safeguarding the industry for future generations.

SAPPA extends its sincere appreciation to all contributors who provide data, insights, and collaboration that enable informed decision-making and continued industry development, with particular thanks to South Africa's producers, processors, and nurseries.



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