PROGRESS

Promoting Green Deal Readiness in the Eastern Partnership Countries

НУБіП

1898

Walnut market analysis

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The walnut market is part of the agricultural market and has specific characteristics:

By product category	By geography	In terms of structure,the market is characterised by	By product type	In terms of competition	By sales channel
This is a market for agricultural produce (nuts in shell and shelled).	The market is international in nature, as a significant proportion of the produce is exported. Ukraine is one of the leading exporters of walnuts.	a large number of small-scale producers; the presence of intermediaries and exporters; a high degree of dependence on external demand.	raw nuts in shell; nut kernels; packaged products; organic products	at the producer level – perfect competition; at the export level – oligopolistic competition; at the global level – intense international competition.	Contract-spot (a significant proportion of contracts with processors and exporters; spot purchases during the peak harvest period – September–October)

Walnut market segments

By consumer category

B2B (business-to-business) - processing plants; - confectionery and food industry; - exporters; - wholesale traders

This is the largest segment, accounting for the bulk of purchases.

B2C (end consumer) - retail trade; - supermarkets; - markets; - online sales.

By product form

- whole nuts in shell;
- shelled kernels (halves, quarters, crumbs);
- packaged nuts;
- processed products (oil, paste, ingredients).

Shelled kernels account for the largest share of exports.

By sales geography

Domestic market
- sales to the general public;
- supplies to food businesses.

Foreign market (exports) - EU countries; - the Middle East; - Asia. For Ukraine, the export segment is a priority.

By type of producer

- households (small-scale segment);
- farms;
- commercial orchards;
- cooperatives.

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Market trends

The growing demand for healthy food

The global trend towards a healthy lifestyle is driving the consumption of nuts as a source of:

plant-based protein;
omega-3 fatty acids;
antioxidants.
Walnuts are marketed as a ‘superfood’, which is sustaining steady demand in the European Union and Asia.

Strengthening the focus on exports

Ukraine is characterised by a high proportion of exports, as the domestic market cannot absorb the entire volume of production. The main destinations are:
EU countries; the Middle East; Turkey.
Exports generate foreign exchange earnings and encourage higher quality standards.

Offset to the cleaned core

The share of exports and sales is growing, particularly for:

shelled kernels;

calibrated products;

vacuum-packed products.

This generates higher added value compared to selling nuts in their shells.

Tighter quality standards

Importers impose strict requirements regarding:

moisture content;

kernel whiteness;

size;

pesticide residues.

The importance of certification (GlobalG.A.P., HACCP) is growing.

Market consolidation

The trend towards:
the consolidation of farms;
the establishment of cooperatives;
the development of commercial orchards.
The proportion of household-run farms is gradually declining, although they still play a significant role.

Price volatility

Global prices fluctuate depending on crop yields in the leading producing countries (the US, China and Chile). This also affects the Ukrainian market.

The development of processing

There is growing interest in the production of:

nut oil;

pastes;

ingredients for the confectionery industry.

This is a sector with high added value.

Challenges facing the industry

1. Climate risks
spring frosts;
summer droughts;
sharp temperature fluctuations;
climate change.
Walnuts are a long-term crop, so climatic risks can affect yields for many years.
2. Fragmented production structure
a significant proportion of households;
lack of quality standardisation;
difficulty in forming large export consignments.
This reduces competitiveness in the international market.
3. Fluctuations in world prices
World prices depend on yields in the leading producing countries: USA, China, Chile, Turkey.
Excess supply on the global market leads to a fall in purchase prices.

4. Stricter quality requirements
Importers, particularly those from European Union countries, impose strict requirements regarding:
aflatoxin levels; moisture content; pesticide residues; product traceability.
Obtaining certification entails additional costs. 5
Logistical and currency risks:
exchange rate fluctuations;
rising transport costs;
delays at borders;
instability of export routes.
These factors affect the profitability of exports.
6. Insufficient processing capacity:
limited capacity for deep processing;
exports consist mainly of raw materials;
low share of high value-added products.
8. Investment complexity lon
payback period (5–8 years);
significant initial investment in orchards and irrigation;
need for modern equipment.

Table 1. Balance of global walnut production, thousands tonnes

Key figures	2010/2011	2015/2016	2020/2021	2024/2025	Percentage change from the 2024/2025 marketing year to the 2010/2011 marketing year
Opening stock	86.8	133.1	118.9	139.0	160.2
Manufacturing	1375.0	2000.4	2374.8	2639.0	191.9
Imports	465.4	664.7	927.8	1100.6	236.5
Aggregate supply	1927.2	2798.2	3421.4	3878.7	201.3
Export	482.7	699.7	975.9	1182.4	245.0
Domestic consumption	1367.7	1979.3	2286.6	2584.5	189.0
Closing stocks	76.9	119.2	158.9	111.8	145.4
Overall distribution	1927.2	2798.2	3421.4	3878.7	201.3

Source: Compiled using data from the USDA, https://apps.fas.usda.gov/

Fig. 1. Main global importers of walnuts in shell in 2024, tonnes

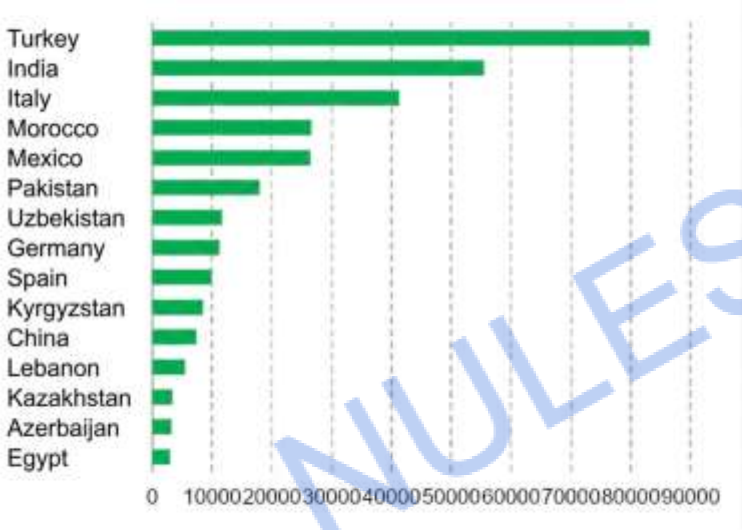
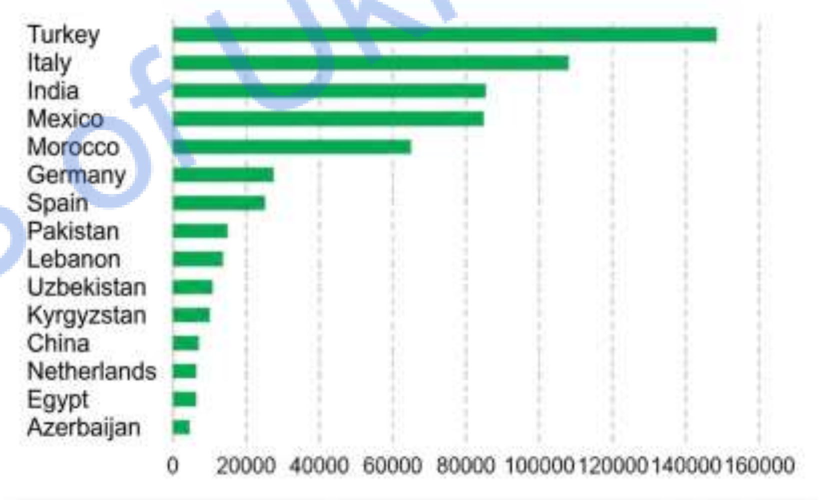


Fig. 2. Value of imports of walnuts in shell by the world's main importing countries in 2024, thousands US dollars



Source: Compiled using data from the UN Comtrade database, https://comtradeplus.un.org/TradeFlowtrade

Fig. 3. Main global importers of shelled walnuts in 2024, tonnes

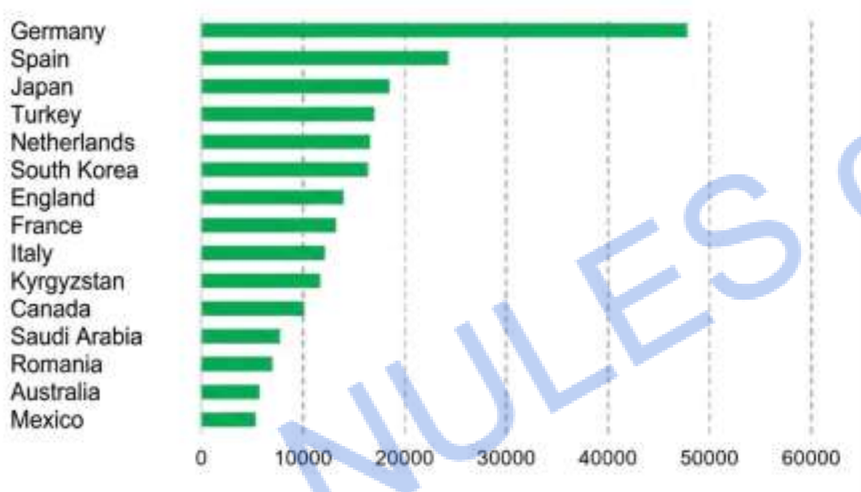
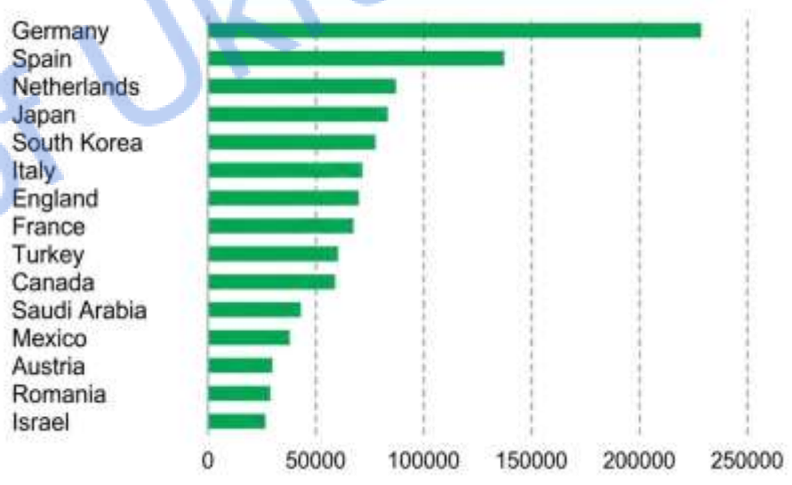


Fig. 4. Value of imports of shelled walnuts by the world's main importing countries in 2024, thousands US dollars



Source: Compiled using data from the UN Comtrade database, https://comtradeplus.un.org/TradeFlowtrade

Fig. 5. Leading global exporters of walnuts in shell in 2024, tonnes

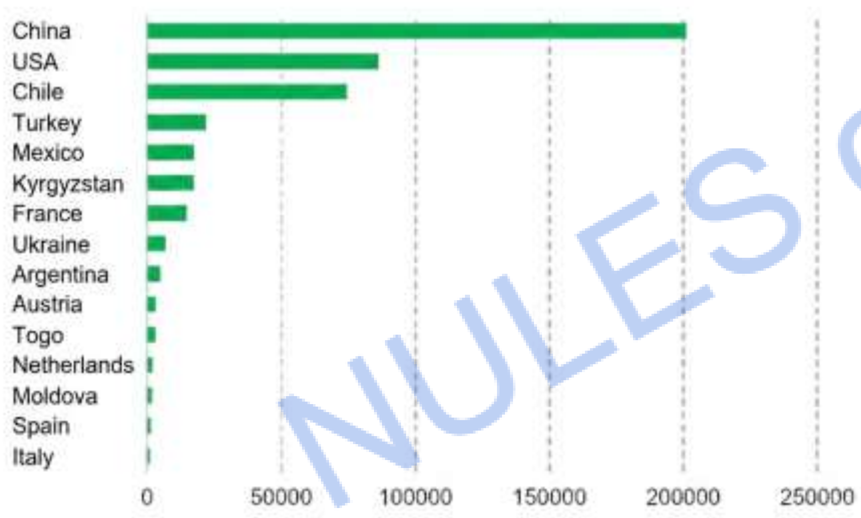
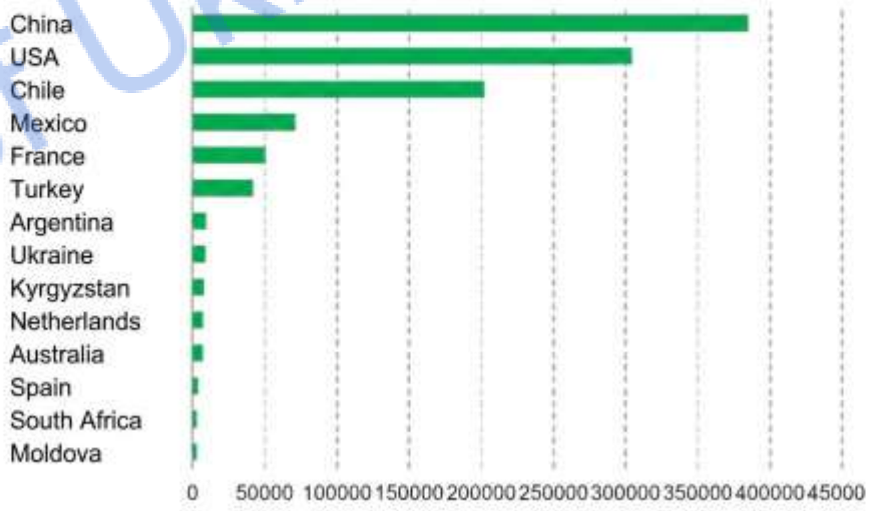


Fig. 6. Value of exports of walnuts in shell by the world's leading exporting countries in 2024, thousands US dollars



Source: Compiled using data from the UN Comtrade database, https://comtradeplus.un.org/TradeFlowtrade

Fig. 7. Leading global exporters of shelled walnuts in 2024, tonnes

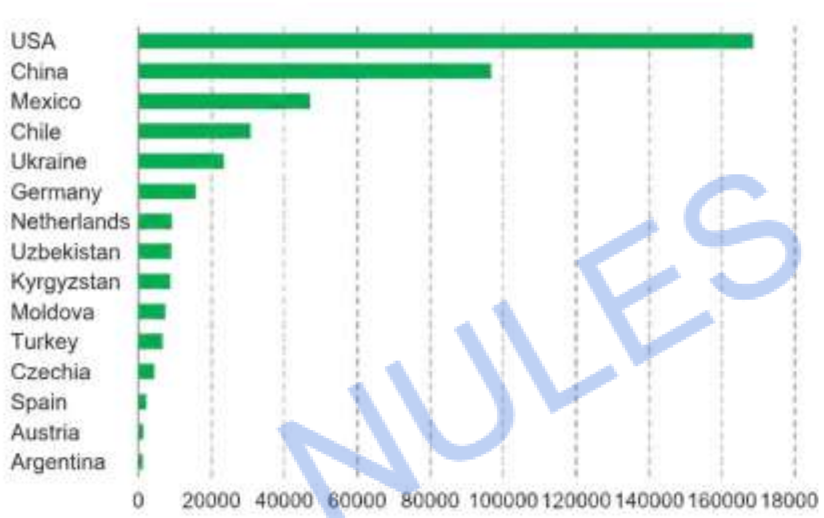
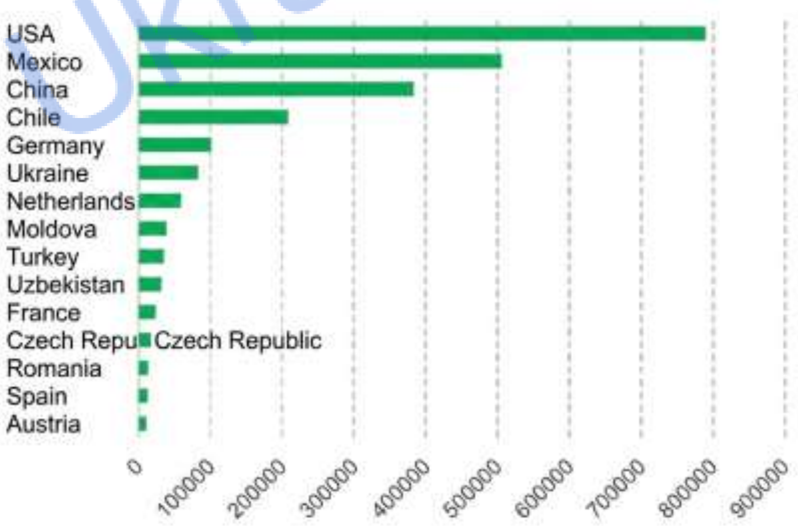


Fig. 8. Value of shelled walnut exports by the world's leading exporting countries in 2024, thousands US dollars

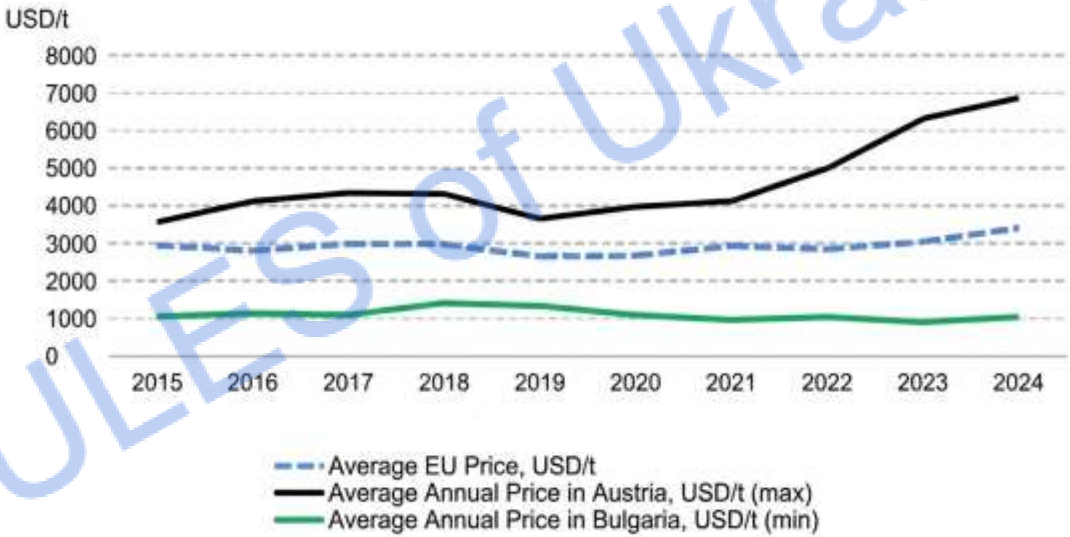


Source: Compiled using data from the UN Comtrade database, https://comtradeplus.un.org/TradeFlowtrade

Fig. 9. Comparison of walnut yields in Ukraine and selected EU countries in 2021, tonnes per hectare

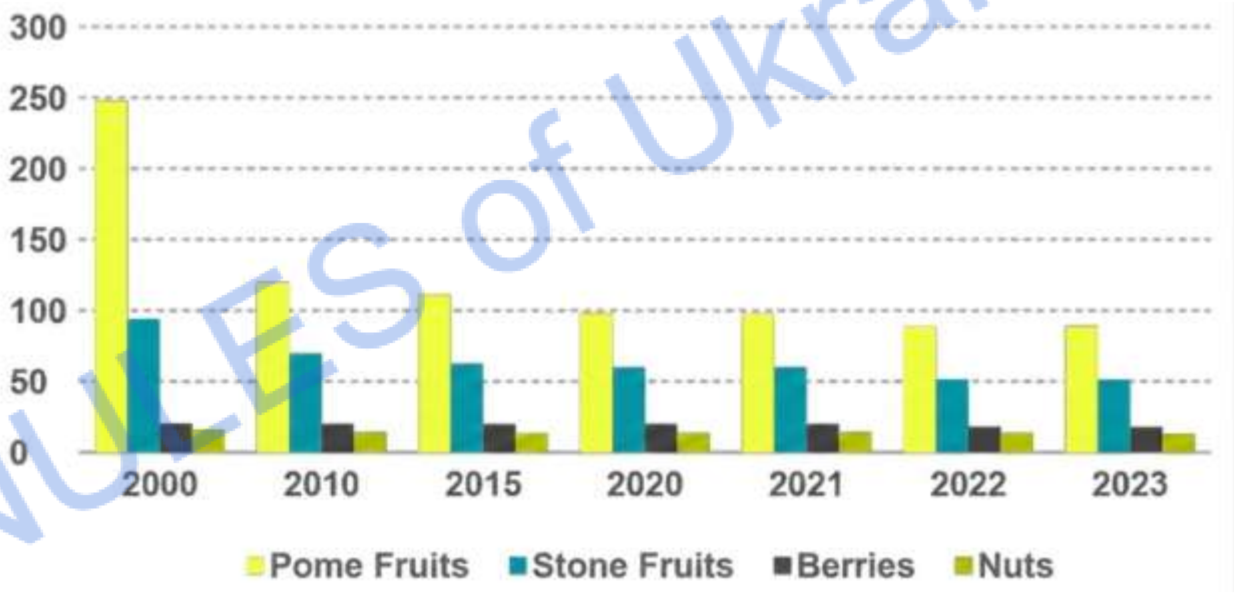
Source: Market Review of Fresh Fruit and Vegetables in the European Union and Ukraine by Individual Crops. Kyiv School of Economics (KSE), Ministry of Agrarian Policy and Food of Ukraine, 2024, 33 pp.
https://KSE_2024 Zvit 1 1_Oglyad rinku svizhih fruktiv ta ovochiv u YES ta Ukrayini_vidformatovaniy_ukrayinskoyu.pdf

Fig. 10. Trends in average annual prices in the EU and individual EU countries, USD/t



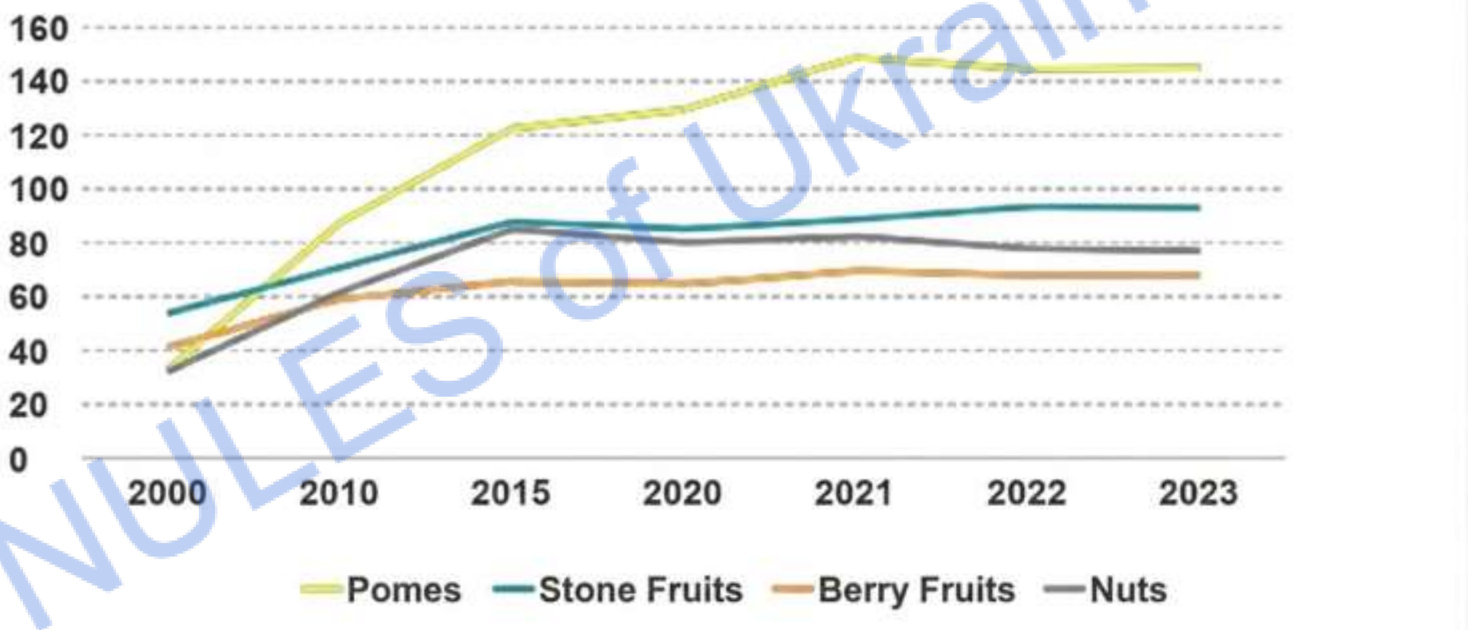
Source: Compiled using data from FAOSTAT, https://www.fao.org/faostat/en/#data/PP

Fig. 11. Area under fruit and berry crops of bearing age, thousand hectares



Source: Compiled using data from the State Statistics Service of Ukraine

Fig. 12. Yield trends for fruit and berry crops, cwt/ha



Source: Compiled using data from the State Statistics Service of Ukraine

Table 2. Activities of fruit and berry growers – large, medium, small

Indicator	2015	2020	2021	2022
The production of pome and stone fruits				
Number of enterprises, units:				
large	-	-	-	-
average	33	27	27	17
small	812	885	827	608
- of which micro-enterprises	751	824	770	552
Operating profit margin of enterprises, %:				
large	-	-	-	-
average	49.6	8.5	-1.1	-17.2
small	28.4	13.9	23.0	0.9
- of which micro-enterprises	15.6	19.1	17.8	4.6
The cultivation of berries, nuts, and other fruit trees and shrubs				
Number of enterprises, units:				
large	-	-	-	-
average	4	6	9	11
small	746	921	912	781
- of which micro-enterprises	729	893	879	753
Operating profit margin of enterprises, %:				
large	-	-	-	-
average	-	45.3	14.2	21.8
small	-	16.6	27.4	8.5
- of which micro-enterprises	28.7	12.8	16.6	13.4

Source: Report on Ukraine for Outcome 1: State Institution 'Institute of Economics and Forecasting of the National Academy of Sciences of Ukraine' for Outcome 1 PROGRESS Findings on the

Table 3. Trends in the area under cultivation, gross yield and yield of walnuts in Ukraine, 2014–2023

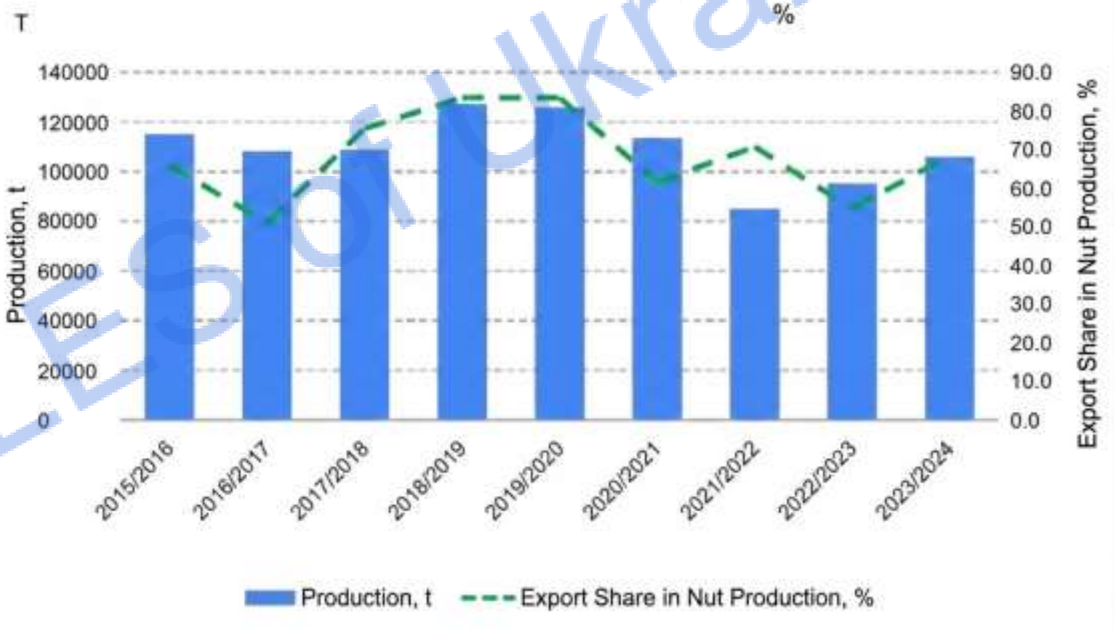
	Key indicators	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Farms of all categories	Gross harvest, thousand tonnes	102.8	115.1	108.0	108.7	127.2	125.9	113.4	115.5	107.9	106.9
	Yield, tonnes per hectare	7.8	8.5	8.0	7.9	9.0	8.5	8.0	8.2	7.8	7.4
	Area of plantations, thousand hectares	13.2	13.5	13.3	13.5	13.8	14.5	13.7	14.1	13.7	14.2
Households	Gross harvest, thousand tonnes	102.5	114.6	106.8	107.4	125.9	124.8	112.5	114.1	106.2	103.1
	Yield, tonnes per hectare	8.1	9.0	8.5	8.5	10.0	9.9	9.0	9.1	9.2	9.2
	Area of plantations, thousand hectares	12.7	12.7	12.4	12.5	12.4	12.4	12.4	12.6	11.6	11.0
Proportion of gross revenue from private households as a percentage of the total number of households across all categories		99.7	99.6	98.9	98.8	99.0	99.2	99.2	98.8	98.5	96.4

Table 4. Walnut production balance in Ukraine,

Key figures	2015/2016	2020/2021	2024/2025	Percentage change from the 2024/2025 marketing year to the 2020/2011 marketing year
Opening stock	1.50	0.54	0.46	85.2
Manufacturing	115.10	113.30	98.64	87.0
Imports	0	0.11	0.10	92.6
Aggregate supply	116.58	113.97	99.20	87.0
Export	75.80	69.80	20.90	29.9
Domestic consumption	39.38	33.00	77.80	235.8
Closing stocks	1.40	11.2	0.50	4.5
Overall distribution	116.58	113.97	99.20	87.0
Self-sufficiency ratio	2.92	3.43	3.72	X

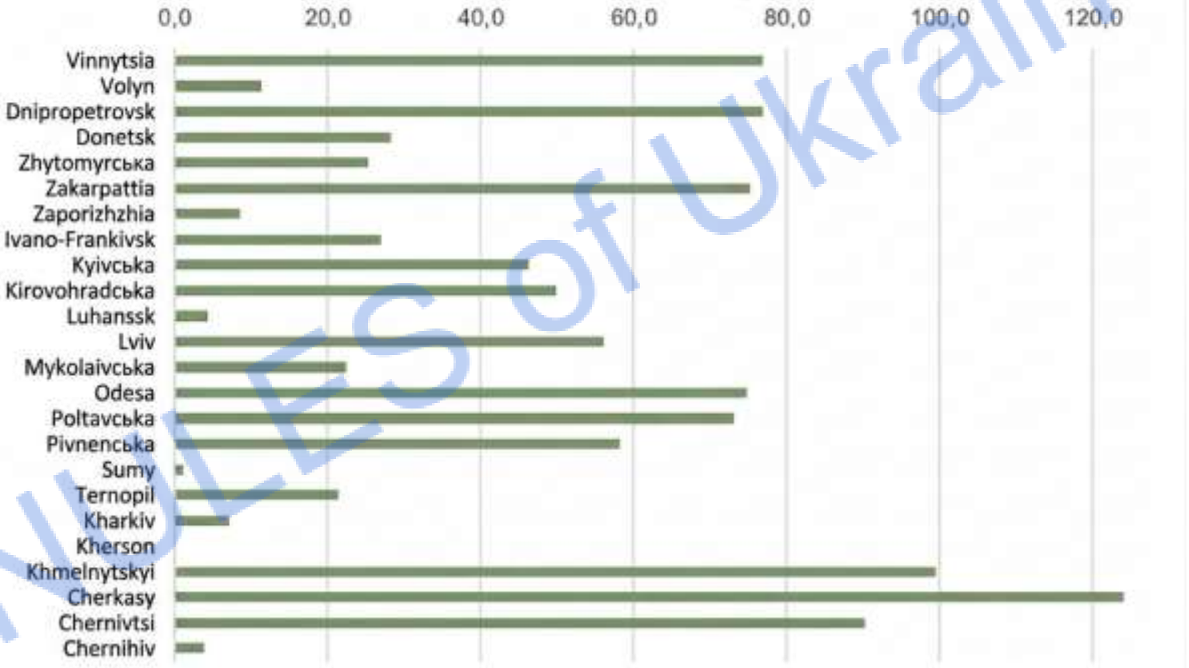
Source: compiled using data from the USDA, https://apps.fas.usda.gov/

Fig. 13. Trends in walnut production in Ukraine and the proportion of exports



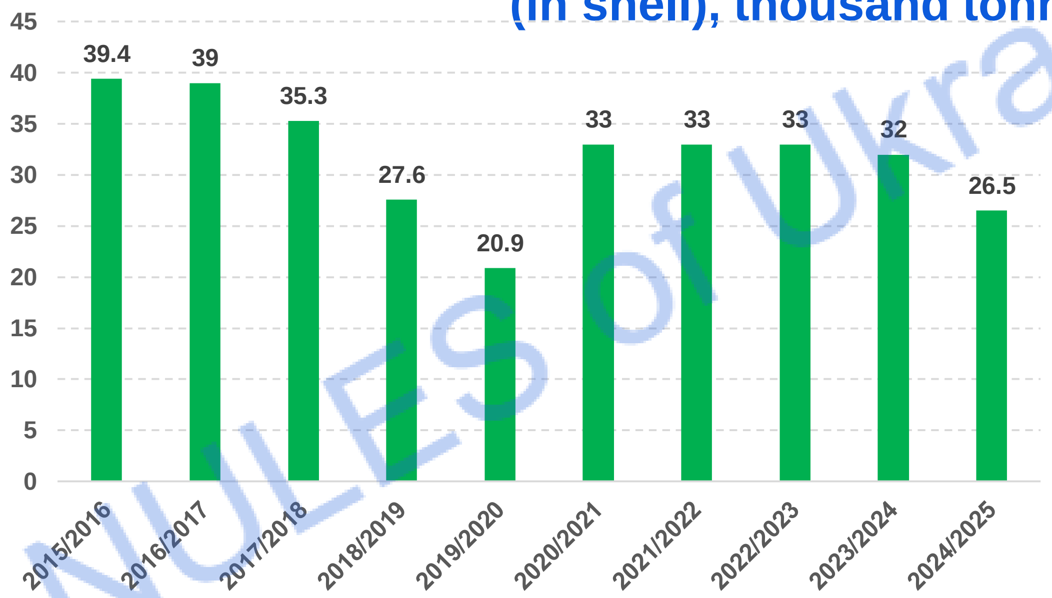
Source: compiled using data from the USDA, https://apps.fas.usda.gov/

Fig. 14. Walnut production by region in Ukraine in 2023, thousand tonnes



Source: Report on Ukraine for Outcome 1. State Institution 'Institute of Economics and Forecasting of the National Academy of Sciences of Ukraine' for Outcome I: PROGRESS F on the Development of a National Programme for Adaptation to Climate Change and Enhancing the Resilience of Agriculture, Fruit Growing and Berry Cultivation, Kyiv, 2025.

Fig. 15. Domestic consumption of walnuts in Ukraine (in shell), thousand tonnes



Domestic consumption in Ukraine averages 33,000 tonnes, which is equivalent to approximately 0.8–1 kg per person

Source: compiled using data from the State Statistics Service of Ukraine, 2025.

Table 5. Trends in walnut exports (HS 08231 – walnuts in shell; HS 08232 –

Product	Exports from Ukraine, thousand tonnes	Value of exports from Ukraine, in thousands of US dollars	Exports from Ukraine to the EU, in thousands of tonnes	The EU's share of Ukraine's exports, %	Ukraine's share of imports into the EU, %	Top 3 importing countries	Top 3 importers among EU countries
2022							
Walnuts in shell (HS 08231)	5.30	4827.1	0.45	8.49	0.95	Turkey, Azerbaijan, Iraq	Romania, Poland, Denmark
Shelled walnuts (HS 08232)	20.10	75307.60	14.27	71.0	12.72	France, Azerbaijan, Turkey	France, Romania, Greece
2023							
Walnuts in shell (HS 08231)	8.58	7679.80	0.56	6.53	1.40	Iraq, Turkey, Azerbaijan	Bulgaria, Italy, Germany
Shelled walnuts (HS 08232)	22.03	69130.74	12.80	58.10	11.40	Azerbaijan, Turkey, France	France, Romania, Greece
2024							
Walnuts in shell (HS 08231)	6.40	8637.09	1.37	21.40	2.54	Iraq, Azerbaijan, Turkey	Bulgaria, Italy, Greece
Shelled walnuts (HS 08232)	23.32	82683.58	18.9	81.05	15.14	France, Romania, Greece	France, Romania, Greece

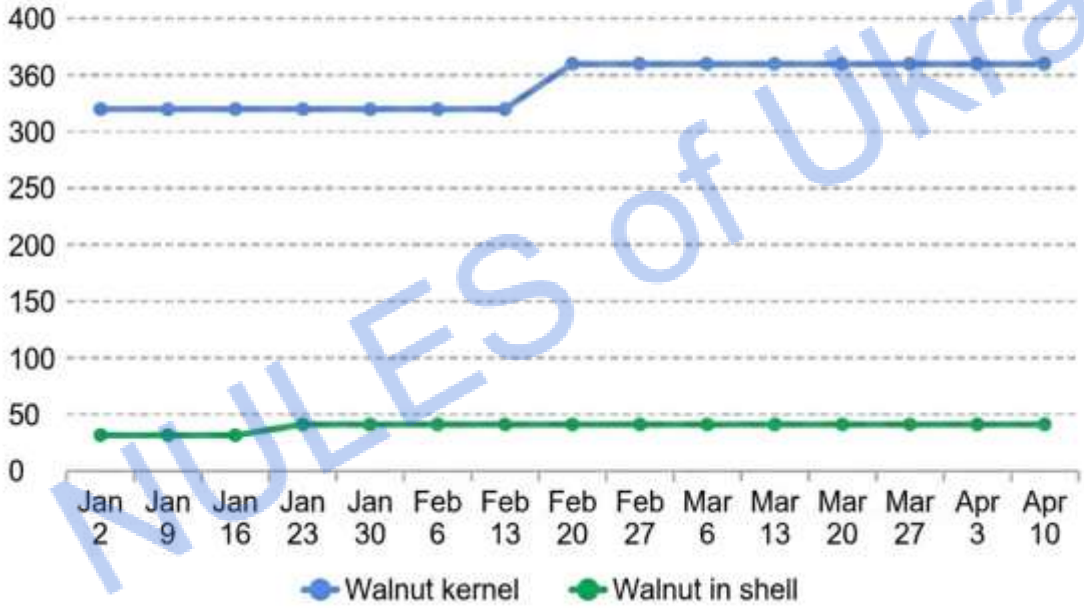
Source: (1) Report on Ukraine for Result 1. State Institution 'Institute of Economics and Forecasting of the National Academy of Sciences of Ukraine' for Result I: PROGRESS Findings on the Development of a National Programme for Adaptation to Climate Change and Enhancing the Resilience of Agriculture, Fruit Growing and Berry Cultivation, Kyiv, 2025;

Table 6. State regulation of walnut exports in Ukraine in 2025, in accordance with the Resolution of the Cabinet of Ministers of Ukraine “On the introduction of an export supply regime”

Parameter	Walnuts in their shells	Shelled walnuts
HS Code	0802 31 00 00	0802 32 00 00
Export mode	Subject to control and export clearance	
Requirements for exporters	Registration as a VAT payer, confirmation of tax liabilities	
Minimum export price	Set by the state	
Customs control	Verification of the minimum value and tax documents	
The actual impact in 2025	The suspension of some export operations, a drop in volumes	
Forecast	Exports may gradually recover in the 2025/2026 marketing year	

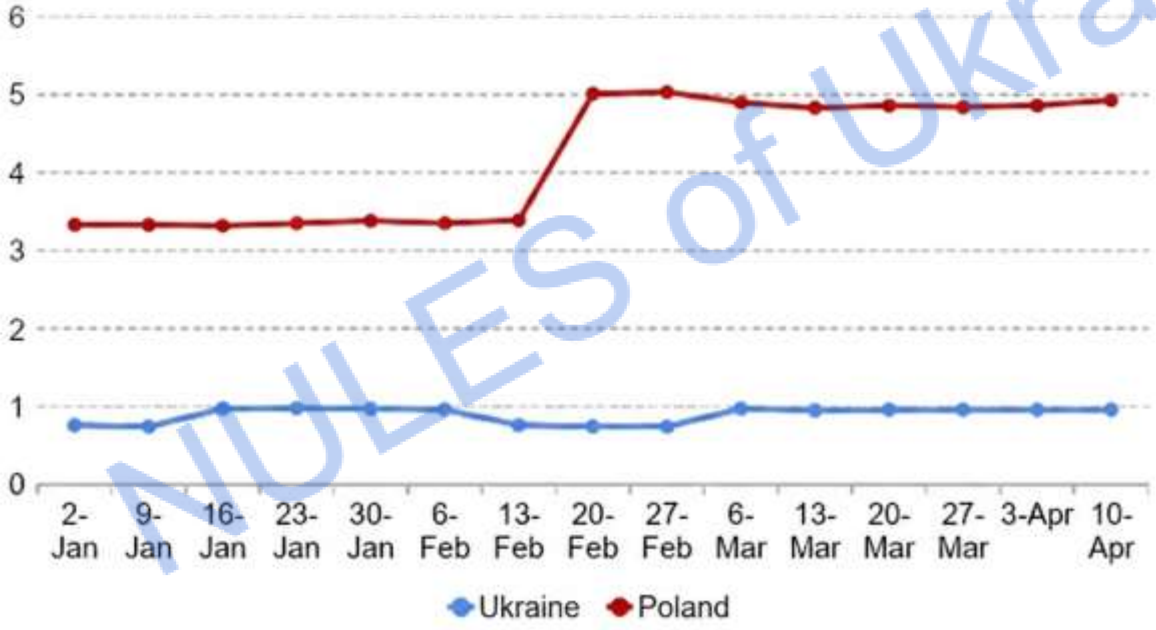
Source: Resolution of the Cabinet of Ministers of Ukraine ‘On the introduction of an export support regime’, https://zakon.rada.gov.ua/laws/main/1261-2024-%D0%BF?utm_source#Text; https://forbes.ua/news/eksport-voloskogo-gorikha-z-ukraini-u-2025-rotsi-obvalivsya-na-90-cherez-novi-eksportni-pravila-profilna-

Fig. 16. Trends in average walnut prices in Ukraine in 2026, UAH/kg



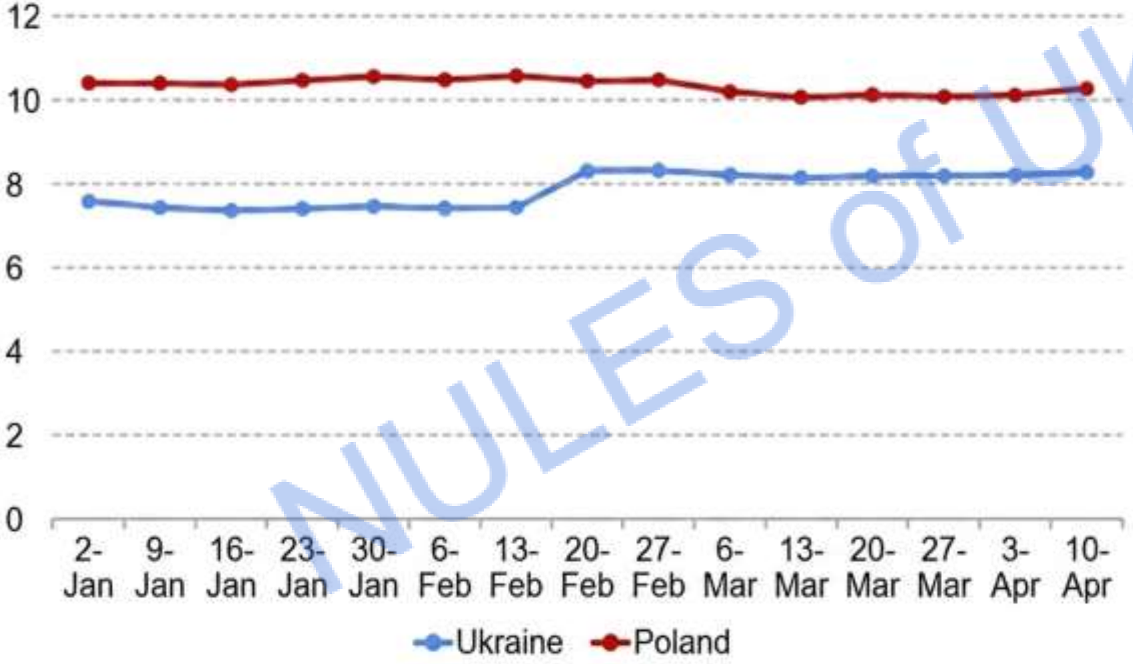
Source: https://east-fruit.com/uk/vybir-produktovoyi-hrupy/tsiny/?group=walnuts&lang=uk

Fig. 17. Trends in average prices for walnuts in shell in Ukraine and Poland, US dollars/kg



Source: https://east-fruit.com/uk/vybir-produktovoyi-hrupy/tsiny/?group=walnuts&lang=uk

Fig. 18. Trends in average prices for walnut kernels in Ukraine and Poland, US dollars/kg



Source: https://east-fruit.com/uk/vybir-produktovoyi-hrupy/tsiny/?group=walnuts&lang=uk

Table 7. Average production cost of walnuts in

No.	Costs	thousand UAH/ha	Percentage of costs in total production costs, %
1.	Amortisation of the cost of establishing an orchard (spreading the investment over 20 years)	45	26.0
2.	Application of organic and mineral fertilisers	18	10.4
3	Application of plant protection products	12	6.9
4	Fuel and equipment	18	10.4
5.	Remuneration (care + collection)	25	14.5
6	Watering and electricity	20	11.6
7.	Administrative expenses	10	5.8
8.	Sorting, drying, primary processing	25	14.5
9.	Total costs	173	100
10.	Walnut yield, tonnes per hectare	6	X
11.	***Cost price per 1 kg***	***29.0***	X

Table 8. Average production cost per kilogram of walnut kernels in 2025

No.	Costs	Meaning
1.	Yield, tonnes per hectare	6
2.	Kernel yield: 45%, t/ha	2.7
3.	Total production cost (in-shell), thousand UAH/ha	173
4.	Additional costs for husking, grading and packaging, in thousands of UAH per hectare	20
5.	Total costs, thousand UAH/ha	193
6.	***Cost price of walnut kernels, UAH/kg***	***72.0***

Source: own calculations based on expert assessments by lecturers at the Prof. V.L. Symyrenko Department of Horticulture, National University of

Table 9. Profitability of producing 1 kg of walnuts in 2025

Key figures	Production of walnuts in shell		Walnut kernel production	
	Wholesale	Retail	Wholesale	Retail
Selling price, UAH/kg	40.0	150.0	280	390
Profit, UAH/kg	11.2	121.2	208.5	318.5
Profitability, %	39	420	292	446

Source: own calculations based on expert assessments by lecturers from the Department of Horticulture at the National University of Life and Environmental Sciences of Ukraine, 2025.

Fig. 19. Diagram of the supply chain in the walnut production sector

The supply chain in the nut sector can be broadly divided into five main components:

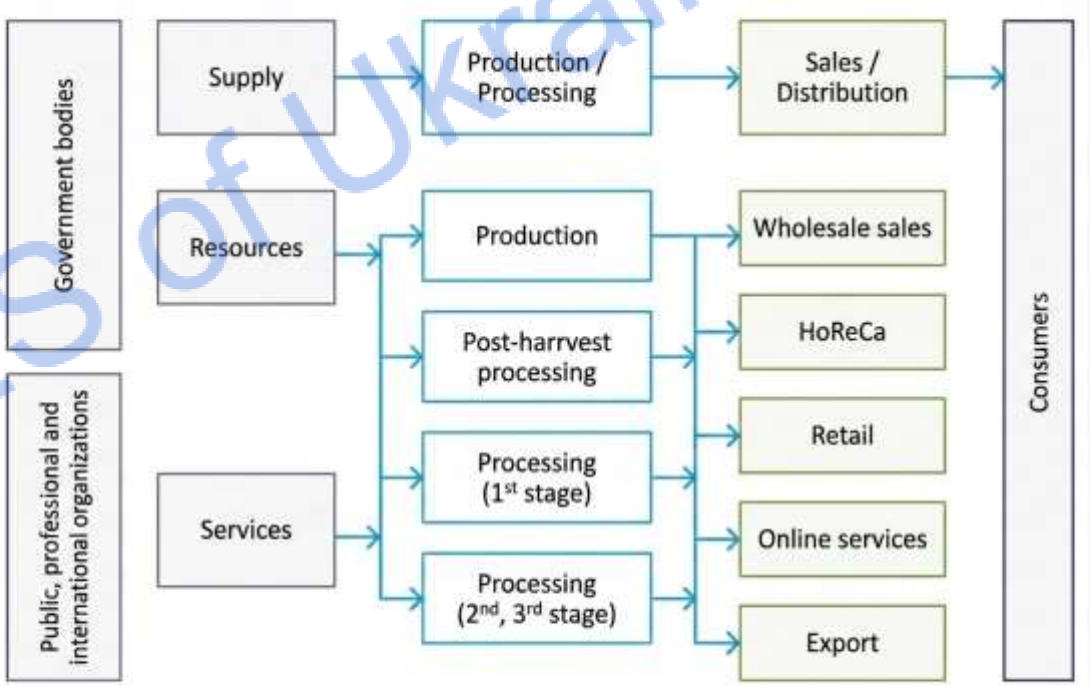
1. regulation and influence by government and non-governmental institutions;

2. Supply;

3. production/processing;

4. sales/distribution;

5. consumption.



Source: https://hub.unido.org/sites/default/files/publications/230215_Value%20Chain%20Analysis%20WEB%20%28UA%29_compressed.pdf

Fig. 20. The walnut value chain

Option 1 – Wholesale

Walnuts Cost price - 29 UAH/kg

Manufacturer's selling price:

36 UAH/kg

(Transport costs – 10% of cost price, manufacturer's profit (on sales) – 15%)

→ Manufacturer's mark-up: Δ = 7 UAH/kg

→ Transport costs: 10% off the standard price

→ Wholesale: Average price (2025) –40 UAH/kg

→ Added value of the wholesale intermediary: Δ = 4 UAH/kg

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

Fig. 21. The walnut value chain

Option II – Retail sales

Walnut

Cost price -

29 UAH/kg

→

Manufacturer's selling price: 36 UAH/kg
(Transport costs – 10% of cost price; manufacturer's profit (on cost price) – 60%)

→

Manufacturer's value added:

Δ = 7 UAH/kg

→

Transport costs – 10% of the reference price

→

Retail sales:

Average price(2025) –

150 UAH/kg

→

Value added in retail sales:

Δ = 110 UAH/kg

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

Fig. 22. The walnut value chain

Option III – Processing into walnut kernels

Walnuts

Cost price -

29 UAH/kg

Manufacturer’s selling price for processing: 36 UAH/kg

(Transport costs – 10% of cost price; manufacturer’s profit (on sales) – 60%)

Manufacturer's added value

Δ = 7 UAH/kg

Transport costs – 10% of the reference price

Processing cost per kernel: 72 UAH/kg + Transport costs – 10% of the cost price; processor’s profit (from the cost price) – 30% Selling price: 103 UAH/kg

Transport costs – 10% of the reference price

Added value of processing plants:

Δ = 60 UAH/kg

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

Fig. 23. The walnut value chain

Option IV – Export of walnuts in shell

Walnuts

Cost price -

29 UAH/kg

Purchase price via an intermediary: ~ 36 UAH/kg (Transport costs + associated costs – ~ 5% of the selling price)

Export price via an intermediary:

~45 UAH/kg

Transport costs – 10% of the reference price

Added value of the intermediary: Δ = 4.5 UAH/kg (Export price – Purchase price – Transport costs)

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

Fig. 24. The walnut value chain

Option V – Export of walnut kernels

Walnuts

Cost price -

29 UAH/kg

Purchase price paid by the intermediary (to the processing plant): 103 UAH/kg (Transport costs + associated costs – ~ 5% of the selling price)

→

Export price via an intermediary:

~ 150 UAH/kg

→

Transport costs – 10% of the reference price

→

Added value of the intermediary: Δ = 32 UAH/kg (Export price – Purchase price – Transport costs)

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

State support for horticultural production

1. Government grants for horticulture, soft fruit growing, viticulture and greenhouse farming.

Grant programme from the Ministry of Economy, Environment and Agriculture of Ukraine
From 2 February 2026, applications for grants were accepted via the ‘Дія’ portal for the development of horticulture, berry growing, viticulture and greenhouse farming. Programme budget: for 2026, the state budget has allocated US dollars 465 million (~UAH 14 billion) for grant support for orchards, berry farms, vineyards and greenhouses.

Grant amounts
Orchards: up to 10 million UAH per project (maximum 400,000 UAH/ha) for planting and establishing orchards covering 1–25 ha
0.4–0.6 ha – up to 2 million UAH
0.8–1.2 ha – up to 3.5 million UAH
1.6–2.4 ha – up to 7 million UAH

Conditions for receiving a grant
• the project must be carried out on land for which ownership or a right of use has been confirmed for at least 7 years;

• for projects in frontline and de-occupied territories, compensation may reach up to 80% of the project cost.

State support for horticultural production

2. Total state support for the agricultural sector in 2026

The Law 'On the State Budget of Ukraine for 2026' provides for:

UAH 13.1–14.1 billion in total state support for the agricultural sector.

These funds are allocated to:

financial support for agricultural producers (subsidies, compensation);

crop insurance;

restoration of irrigation systems;

other programmes that may also indirectly support horticulture (for example, preferential lending or compensation for certain types of agricultural projects).

State support for horticultural production

3. An orchard grant is a non-repayable financial subsidy for: -
establishing fruit orchards;
berry fields (strawberries, raspberries, blueberries, etc.);
vineyards.
The grant is awarded on condition that jobs are created and the funds are used for their intended purpose.
Grant amount: up to several million hryvnias (depending on the crop and area).
Area: typically from 1–2 hectares (berry fields) to larger areas for orchards.
applicant covers part of the costs (e.g. 30–50%) themselves.

Grant funds may be used for:
planting material;
irrigation systems;
nets, supports;
maintenance equipment;
infrastructure development (partially).
Mandatory conditions are:
owning the land or holding it under a long-term lease;
submitting a business plan;
creating jobs.

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State support for horticultural production

4. The ‘eRobota’ programme, launched on 1 July 2022, is designed to support small and medium-sized businesses across the country. The programme’s main objective is job creation, and one of its key components — “Sviy Sad” (Own Orchard) — is specifically targeted at agricultural producers and farmers planning to establish or expand plantations of fruit, berry crops, grapes and nuts.

Under this grant programme, recipients can receive funding ranging from 140,000 UAH (approximately US dollars 3,800) to 400,000 UAH (approximately US dollars 10,800) per hectare, but not exceeding 10,000,000 UAH (approximately US dollars 270,000) in total per beneficiary.

Grants are provided for up to 70% of the total project cost, provided that the beneficiary covers the remaining 30% with their own or external funds (e.g., through loans).

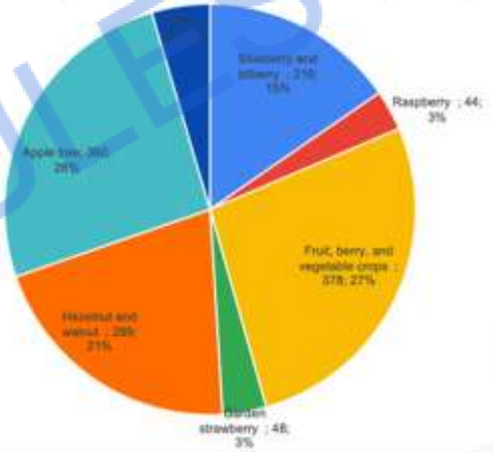

Fig. 25. Distribution of grants by product type, in millions of UAH

Source: minagro.gov.ua

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CONCLUSIONS

The walnut production sector in Ukraine has significant export potential and favourable natural and climatic conditions. At the same time, its development is hampered by unstable export regulations, the prevalence of small-scale production, and price fluctuations.
Future prospects are linked to the modernisation of orchards, the development of processing, improvements in product quality and the stabilisation of foreign trade.

Key challenges

1. Export restrictions and regulatory risks

New government regulations introduced at the end of 2024 virtually halted walnut exports during the peak season, significantly undermining export sales, exporters' revenues and their competitive position in the global market.

2. Low level of industrial commercialisation

Most of the produce comes from private farms, which makes it difficult to assemble uniform, large-volume consignments for export.

3. Product quality

Low standards of drying, storage and processing lead to product quality issues (moisture, mould, toxins), which is particularly important for the EU export market and its high food safety requirements.

4. Infrastructure constraints

A lack of modern storage facilities, processing lines, photo-sorters and packaging equipment reduces added value in processing and limits opportunities to sell kernels in more lucrative markets.

5. Risks of global competition

Global giants, particularly China, are gaining ground in the global nut

Development prospects

1. Growth in international demand

The global walnut market continues to expand, and the projected growth in production and demand could create new opportunities for Ukrainian exporters, provided that regulatory restrictions are lifted and quality issues are resolved.

2. Export-oriented potential

3. Value-added products

Processing and selling shelled kernels increases revenue.

4. Government support

Government support programmes (for example, compensation of up to 70% of the costs of establishing orchards) encourage the development of new plantations and modernisation.

5. Organic market and "green" products

Ukrainian nuts have the potential to be positioned as an environmentally friendly and low-carbon product, which adds to their

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