

Hazelnut - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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Report description:

Hazelnut Market Analysis

The hazelnut market is expected to grow from USD 12.3 billion in 2025 to USD 13.08 billion in 2026 and is forecast to reach USD 17.81 billion by 2031 at 6.37% CAGR over 2026-2031. Rising confectionery demand and sustained interest in plant-based nutrition support this trajectory. Recent severe frost damage significantly reduced hazelnut production, prompting producers to expand operations into Romania, Chile, and the United States to reduce supply risks. The Asia-Pacific region's increasing demand for premium nuts has redirected trade flows from Europe and increased high-quality kernel prices. Global chocolate manufacturers are implementing vertical integration, while the United States' adoption of mechanized harvesting is changing industry cost structures. To meet stringent buyer requirements, exporters are implementing quality certification and traceability systems. South American producers are leveraging favorable climate conditions and competitive labor costs to challenge established suppliers. The hazelnut supply chain participants are adapting their strategies to address growing consumer emphasis on sustainability and ethical sourcing.

Global Hazelnut Market Trends and Insights

Rising Demand from Confectionery and Spreads

The global hazelnut market is primarily driven by chocolate, biscuit, and spread manufacturers, with Ferrero expanding its market presence through the WK Kellogg acquisition and subsequent integration of hazelnuts into breakfast products. Italian scientists

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have demonstrated that Tonda Gentile Romana hazelnut extracts can inhibit liver cancer cell growth in laboratory conditions, enhancing the ingredient's functional appeal. The growing demand has strengthened price stability and increased competition for certified, premium-quality hazelnuts. Consumer preference for nutritious ingredients has positioned hazelnuts as both an indulgent and functional food component, leading to product innovations across multiple categories, including granola and dairy alternatives. The market also shows increased emphasis on origin verification and traceability systems, particularly in the premium segment.

Backward-integration by Global Chocolate Majors

Ferrero's acquisition of Turkish supplier Oltan demonstrated its move toward complete supply chain control, which competitors are now adopting. The company provides research grants to Oregon State University and Rutgers University to develop frost-resistant hazelnut varieties, strengthening its domestic sourcing capabilities and climate adaptation. Ferrero established a large-scale plantation in Romania dedicated to its supply chain, showing how major buyers are developing new production centers. These initiatives protect against climate-related disruptions and influence market negotiations. The company's investments in production facilities and research establish a model for vertical integration that improves product tracking and quality control. This approach to supply chain management is becoming increasingly common among premium confectionery manufacturers as global demand grows.

Climate-driven Pest and Disease Outbreaks

Hazelnut-producing regions face increasing climate and disease pressures that affect production patterns. In Europe, the spread of Fusarium infections threatens crop yields and requires additional biosecurity measures. North American producers continue to manage Eastern Filbert Blight, implementing strict monitoring protocols and resistant varieties. Global temperature increases worsen these challenges by promoting aflatoxin contamination in warm, humid conditions, which affects food safety standards and export capabilities. Producers are responding through investments in cold-storage infrastructure and disease-resistant variety development. These necessary adaptations increase operational costs, affecting profit margins and operational strategies. The industry is evolving toward more technology-driven practices across traditional and emerging production regions.

Other drivers and restraints analyzed in the detailed report include:

Adoption of Sustainable Agro-forestry Practices
Mechanized Harvesting and Post-harvest Innovations
Volatile Ocean-freight Rates
Compressing Exporter Margins

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Hazelnut Market Report is Segmented by Geography (North America, Europe, Asia-Pacific, South America, Middle East, and Africa). The Report Includes Production (Volume), Consumption (Volume and Value), Import (Volume and Value), Export (Volume and Value), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

Geography Analysis

Europe holds 63.20% of the hazelnut market size in 2025, supported by its advanced processing infrastructure and established expertise. Germany and Italy are primary importers, utilizing extensive roasting and paste-making facilities to supply regional confectioners. European processors leverage integrated logistics and quality systems, incorporating sustainability certifications and carbon-positive cultivation zones. Increased demand from Asian buyers is elevating kernel prices, affecting procurement

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strategies. The emergence of new plantations in Romania and Chile may gradually reduce Europe's market share despite its current strong position.

Asia-Pacific demonstrates a 6.68% CAGR, leading all regions due to increased disposable incomes and health-conscious consumption patterns. Urban consumers show growing preference for nut-infused products, including chocolate, bakery items, and plant-based beverages, particularly in tier-one cities. Retailers are expanding their product range with hazelnut cereal bars and flavored milks, increasing per-capita nut consumption. The maturation of domestic hybrid orchards may reduce import requirements. The region's move toward self-sufficiency creates a market environment where premium positioning and wellness attributes are essential for maintaining margins.

North America has transformed from a net importer to an emerging exporter through mechanized harvesting and disease-resistant cultivars, particularly in Oregon. The region experiences growth in domestic consumption, primarily in plant-based dairy and artisanal spreads, while simultaneously increasing export volumes. Canada continues as a significant buyer, though internal demand influences market patterns. Concurrently, South American and Eastern European producers are developing new orchards and sustainable agro-forestry systems, diversifying global supply and creating additional competition for traditional hazelnut producers.

List of Companies Covered in this Report:

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Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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