

EU – Turkey Cooperation scheme on hazelnuts

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2024/NOVEMBRE/11th

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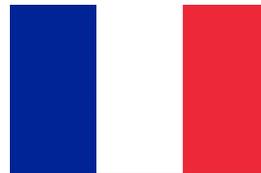


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French Hazelnut Production

- *Production, orchards and quality*
- *Price trend*
- *Production forecast 2024*
- *General issues*
- *Plant health issues*



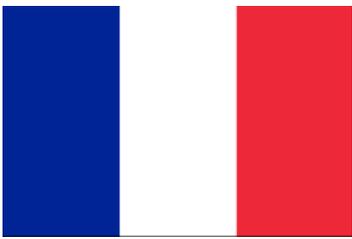
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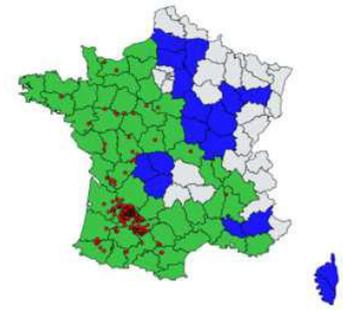


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Key figures



- **France = SMALL HAZELNUT PRODUCTION but**
 - 3rd largest producer in the EU
 - 4th largest consumer in the world
- **French hazelnut production is a very organised sector :**
 - 1 coop : SCA Unicoque 90% of the crop
 - 1 growers association : ANPN 95% of the growers
- **350 growers**
- **7000Ha hazelnut orchard, 4500Ha of adult trees**
- **2027-30 predicted crop : ~14 to 15 000T (Inshell)**
- **50% dedicated to inshell market** but evolution to 70% shelled for industry
- **Mix cultivars :**
 - old ones Italian and US origins,
 - french ones : Pautetet, Corabel, Segorbe
 - New ones from Oregon : Lewis, etc...



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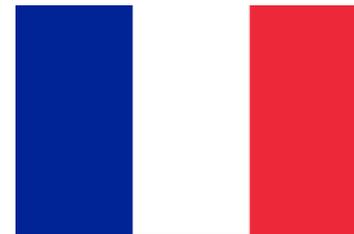
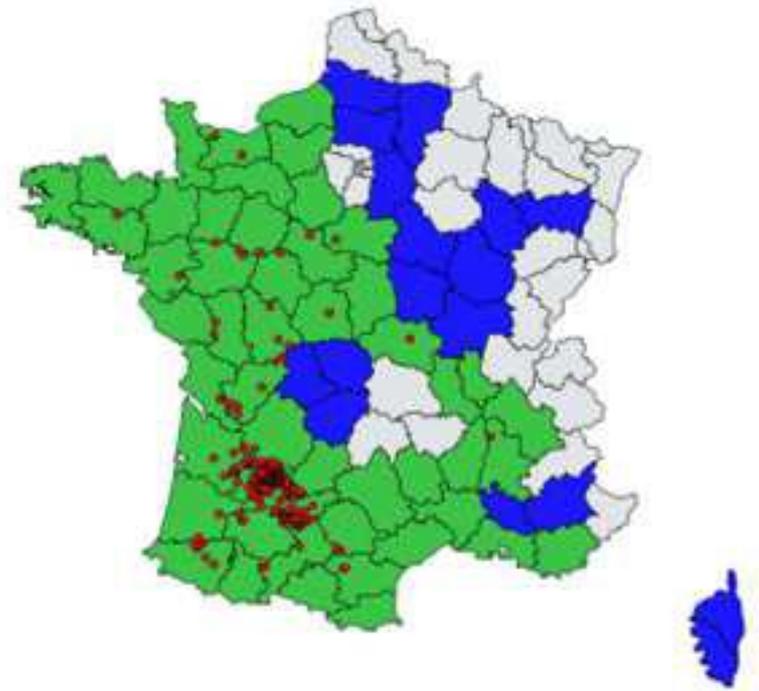


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European Commission
Agriculture and Rural Development

UNICOQUE : production area

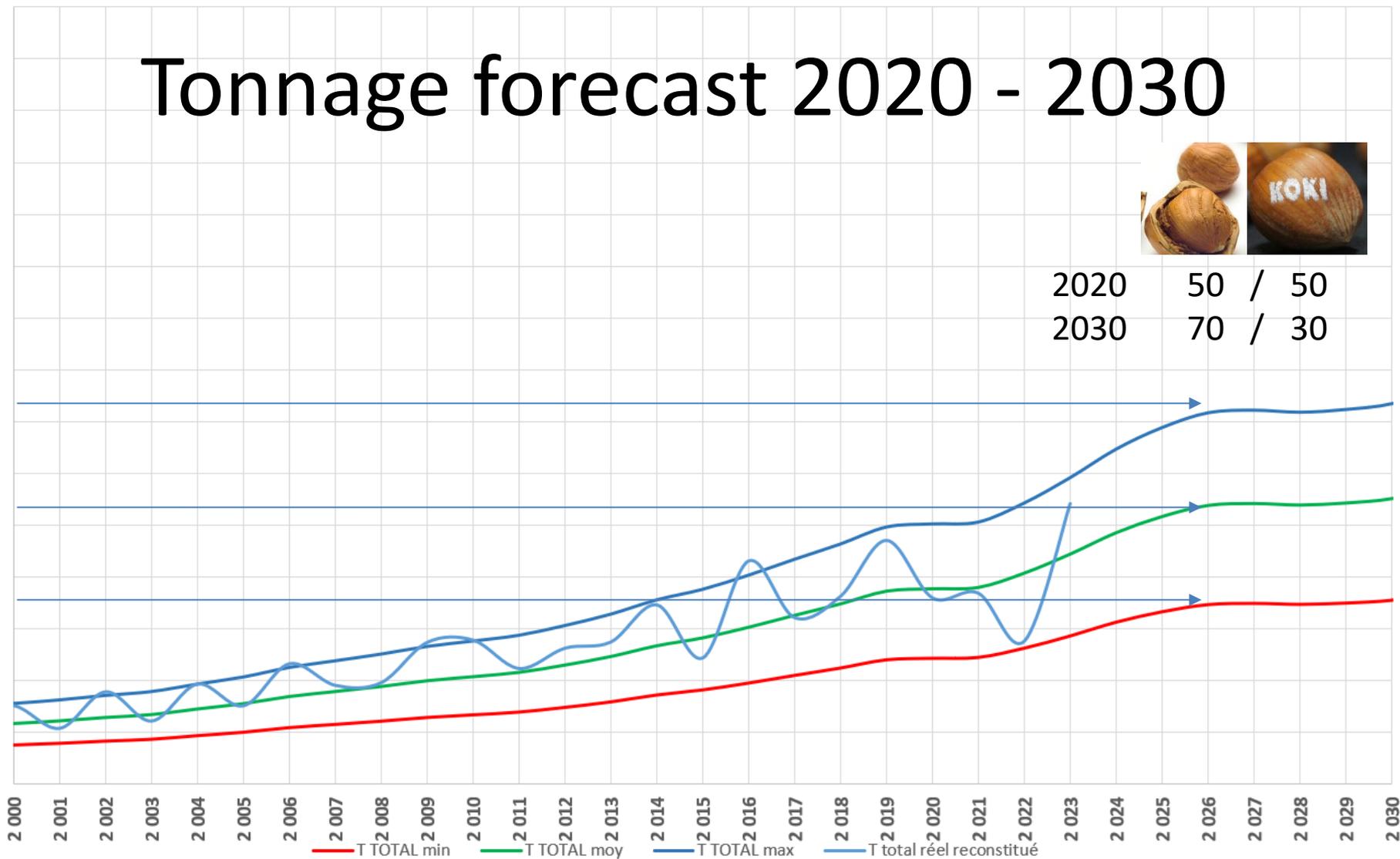


Evolution tonnages potentiels noisettes

Tonnage forecast 2020 - 2030



2020	50 / 50
2030	70 / 30



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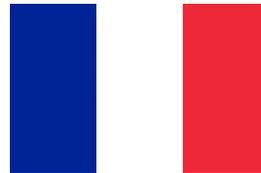
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Quality and safety

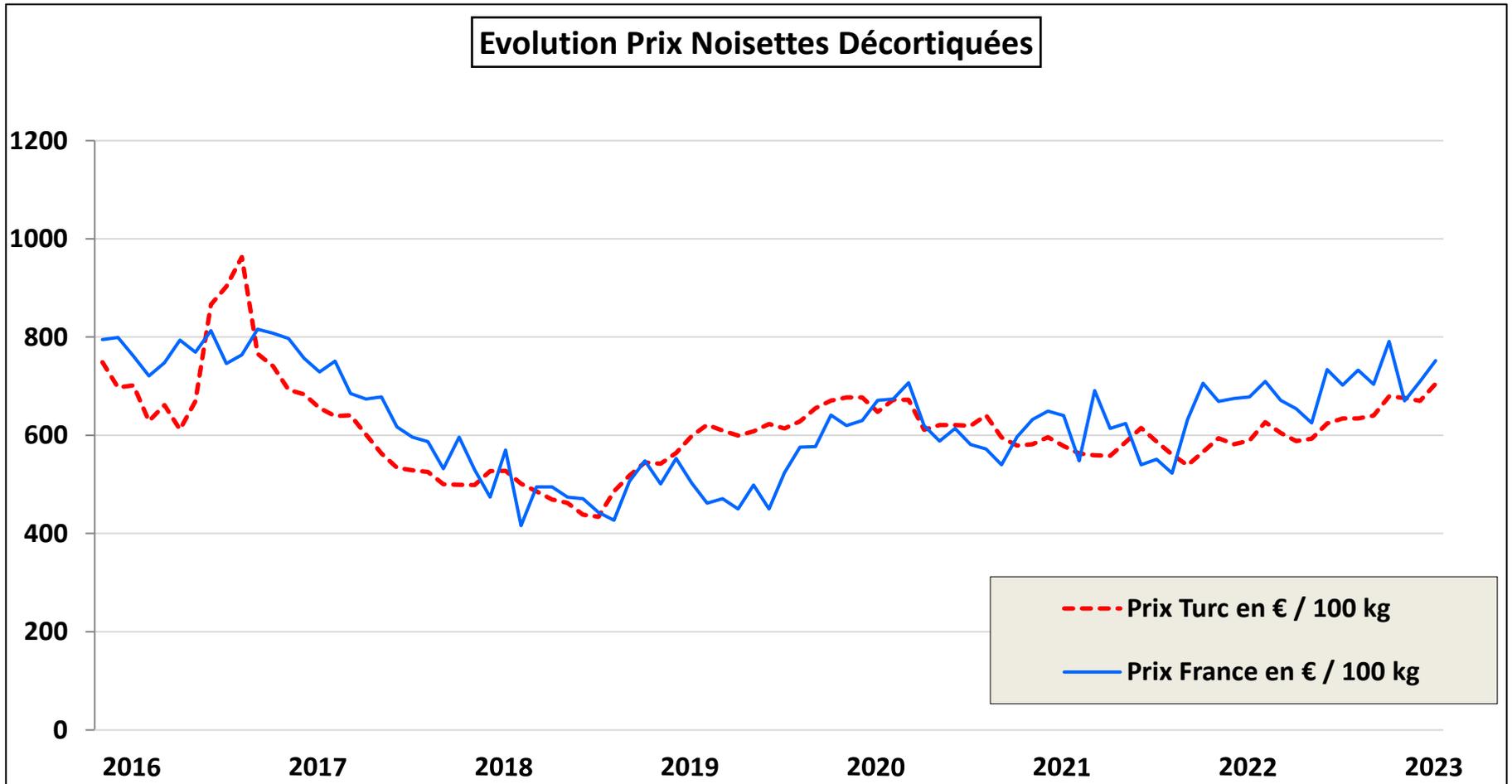
- **No aflatoxins** detected since 1999
- **No pesticides** over LMR since 1999
- **Traceability** from harvest to customer
- Very high quality standard levels and **certification**
- **Very strict french regulation concerning pesticides use (no neonicotinoïdes)**
- **=> BMSB damages X 3 in 2023 vs average 2015-2020 period**

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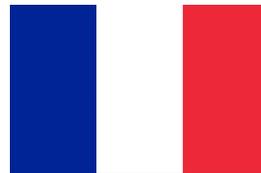


Prices trend (kernel €/kg)



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Tonnage forecast 2024

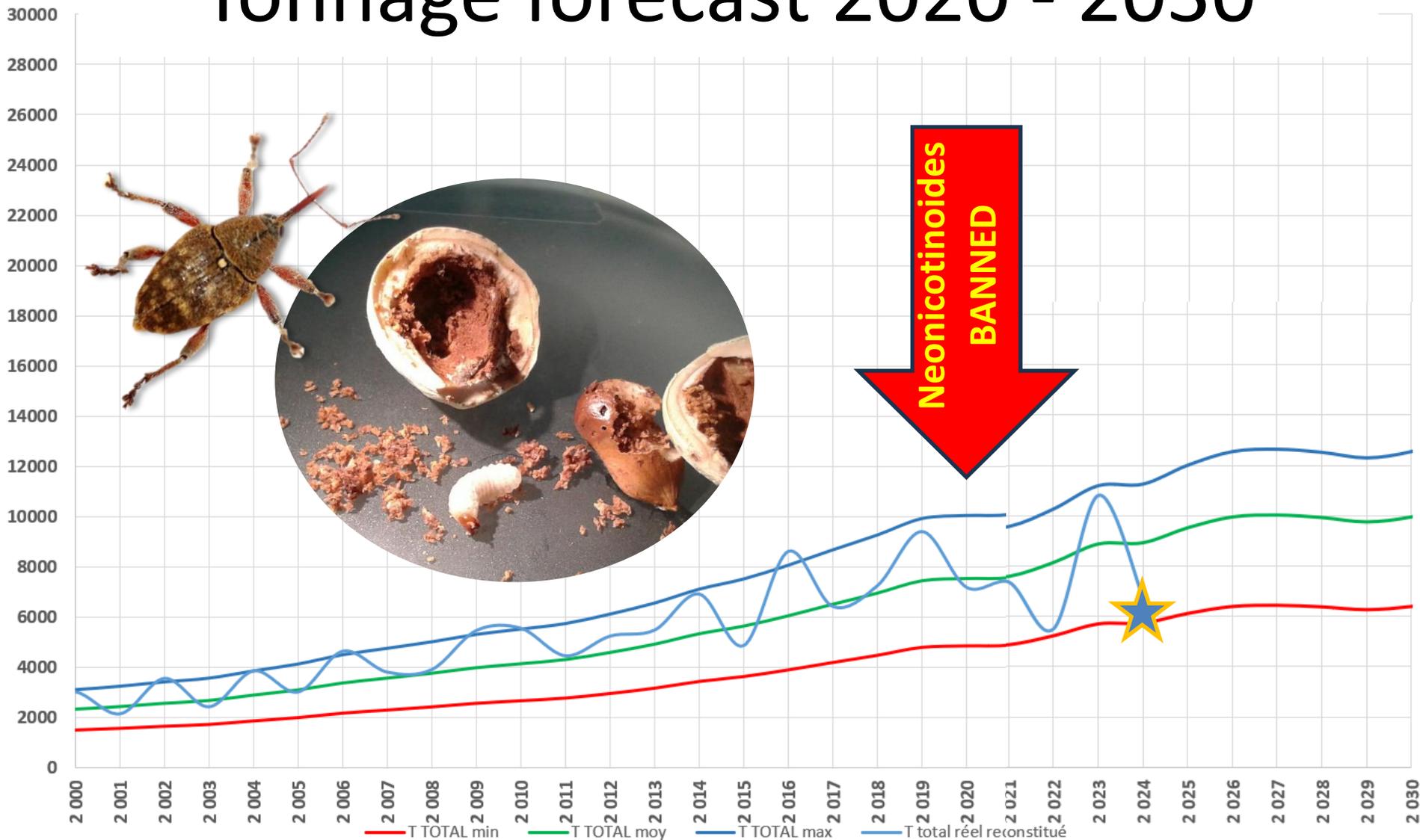
- Very rainy period in France from the end of october 2023 to october 2024
 - => Pollination, harvest pertubated and general trees health problems appears
- **Very hight pests damages** without any capacity to manage (**no neonicotinoïdes**)
 - *Curculio nucum* damages up to 50%
 - *BMSB* damages up to 30%



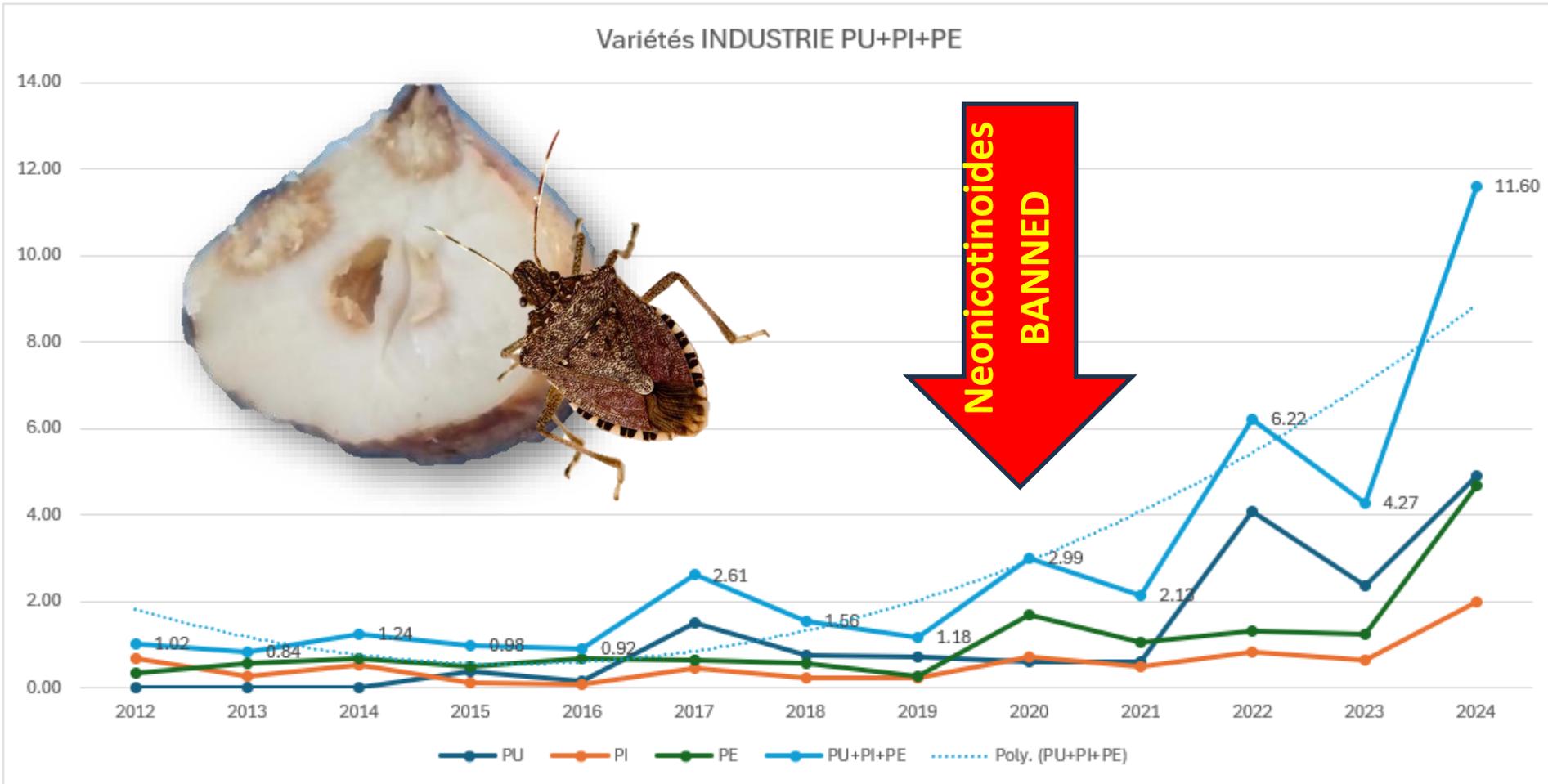
Main pests



Tonnage forecast 2020 - 2030

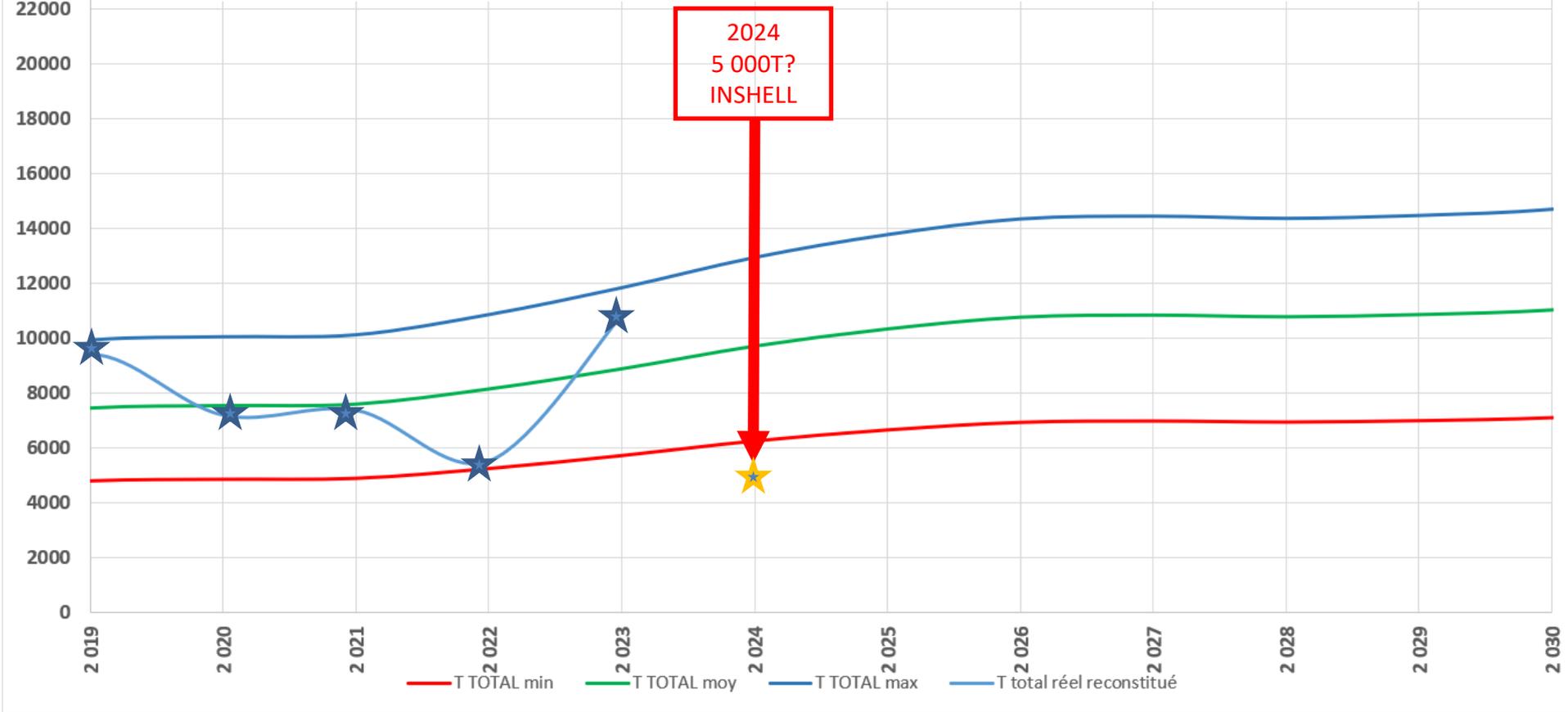


BMSB damages 2012-2024



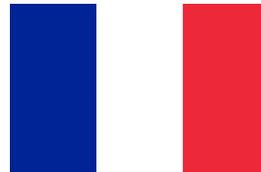
Saleable T (CEE-ONU DDP 004) 2024 crop : <5000T?

↔ 40% of the french potential T



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General issues

- **Prices stability** is important to stabilize market, industry and production :
 - Very high prices leads to substitution and consumption decrease
 - Low prices increase growers difficulties
- Importance of **long term strategy** view
- **Quality and traceability** are very important
- **Pest management is a priority as French regulation is an exception in the world**

General issues

- New pests (*Halyomorpha halys*) and new pesticides regulations = strong incidence on french production
- French prices 2024 trend : increase as very low quantities available
- Very important increase of production cost due to
 - Pesticides UE and French regulation
 - Important pest damage



Plant protection products in the EU

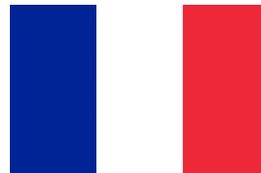
French hazelnut orchards : Pests

- French growers only have insecticides from one chemical family :
 - *The pyrétrinoïdes*
- This family have **only 60% effect** on our main pests :
 - *Curculio Nucum*
 - *Haliomorpha Halys*
- Between one chemical with 95% effectiveness and another one with 60% :
 - **Losses are multiplied by 8**
 - **Costs increased of 68%**



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Hazelnut pest Management is a very high level of practice in the EU, but :

- **The pressure of pests become higher and higher linked to climatic changes.**
- **The economic impact of pest and diseases are very high and added to other parameters such as frost and drought...**
- **Actives ingredients allowed are very limited in number and in number of application, and therefore insufficiently effective.**
- **Hazelnut is considered as minor use, a little interest for phytosanitary companies.**
- **The level of pesticides residues is perfectly controlled by growers**

Main goals for UE growers :

- **The EU regulation on pesticides affects drastically french/UE hazelnut production in terms of quantity and quality**
- **No hazelnut from Turkey, Chile or USA could be grown in France and EU with their pests management practices**
 - From our perspective, reciprocity should be the basis of sanitary (SPS) and trade policies
 - Very precise residues monitoring should be the first step

A close-up photograph of several green hazelnut husks (involucres) on a branch. The husks are bright green and have a textured, ribbed appearance. They are surrounded by green leaves with serrated edges. The background is a soft-focus blue sky.

THANK YOU...