

# **Raw Almonds Market Outlook 2026-2034: Market Share, and Growth Analysis By Product (Pieces, Paste, Flour, Milk, Others), By Application (Snacks and Bars, Milk Substitutes and Ice Creams, Bakery and Confectionery, Nut and Seed Butters, RTE Cereals, Others)**

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## **Abstracts**

The Raw Almonds Market is valued at USD 10.09 billion in 2025 and is projected to grow at a CAGR of 10% to reach USD 23.79 billion by 2034.

### Raw Almonds Market

The Raw Almonds Market spans in-shell and shelled sweet almonds sold as whole, diced, meal, and flour, positioned across retail snacking, bakery, confectionery, dairy-alternative bases, nut butters, and foodservice. Supply is anchored by large, export-oriented origins with varieties such as Nonpareil, Carmel-type, Butte/Padre, and Spanish/Italian pollinators; value creation hinges on kernel appearance, size, chip/scratch tolerance, moisture control, and tight food-safety systems. Water availability, pollination efficacy, and heat/frost risks shape yields and grade mix, while alternate bearing and orchard age profiles influence medium-term supply elasticity. Handlers differentiate through optical sorting, gentle conveyance, allergen segregation, and steam/PP pasteurization that preserves “raw” labeling interpretations where permitted. Demand is buoyed by protein-dense, clean-label snacking, low-carb/keto adoption, and plant-forward reformulations, with private label and club formats expanding penetration. Regulatory drivers include aflatoxin controls, pesticide MRLs, organic certification, and import documentation, alongside evolving definitions of “raw” and accepted lethality steps. Trade flows track tariff regimes, currency swings, and

container availability; festivals and gifting cycles add seasonality in key import markets. Sustainability narratives center on micro-irrigation, orchard water budgets, bee-friendly practices, by-product valorization (hulls/shells), and carbon accounting from orchard establishment to handling. As brands tighten specifications, the winners combine reliable grade availability, validated food safety, and responsive pack formats with storytelling on origin, pollinator health, and water stewardship - while managing cost-to-serve through efficient conditioning, inventory rotation, and multi-market routing.

## Raw Almonds Market Key Insights

**Supply fundamentals: orchards, water, and pollination** Orchard age structure, rootstock choice, and replant pipelines dictate medium-term productivity, while drought, heat waves, or spring frost shift grade distributions and chip/scratch rates. Bee colony strength, hive placement, and bloom overlap with compatible pollinizers directly influence nut set; suppliers investing in pollinator partnerships and bloom-risk mitigation achieve more stable output and quality.

**Quality and grading drive realized value** Kernel color, size counts, freedom from chips/splits, and infestation control are primary price discriminators. Advanced optical sorters, X-ray, and inline NIR moisture checks reduce defects and enable tighter specifications for premium retail, confectionery, and export buyers. Gentle handling - from hulling through conditioning - preserves surface integrity crucial for “natural” whole-kernel packs.

**Food safety and the meaning of “raw”** Salmonella controls increasingly require validated lethality steps (steam, PPO/PP alternatives where permitted) while retaining sensory attributes. Different jurisdictions interpret “raw” variably; processors maintain clear labeling and certificates of treatment. Allergen cross-contact programs, sanitation design, and full traceability are now baseline for multinational buyers and e-commerce brands alike.

**Aflatoxin vigilance and residue compliance** Tight screening protocols and lot-based certification are essential for high-scrutiny destinations. Upstream drying practices, rapid moisture stabilization, and sound storage (temperature, aW) prevent mold growth. Integrated residue monitoring - and rapid rework/separation of non-compliant lots - protects service levels and brand reputation.

**Processing formats expand use occasions** Growth in clean-label almond flour,

protein-forward blends, and minimally processed snack mixes widens channel reach. Particle-size control, fat management, and anti-caking are critical to baking performance, while stabilized meal/flour reduces rancidity risk. In-shell formats retain relevance for seasonal gifting and value-seeking segments in key import markets.

**Channel dynamics: private label vs. brands** Retailers scale private labels with stringent vendor scorecards (fill rates, spec adherence, sustainability claims), compressing premiums for mid-tier brands. National and challenger brands defend share via origin stories, bee-friendly certifications, transparency on irrigation practices, and functional benefits (satiety, macros), often paired with recyclable or mono-material packs.

**Trade policy and logistics as swing variables** Tariff bands, quota windows, and sanitary documentation requirements steer routing and pack decisions. Container availability and freight volatility influence shipment timing and preferred forms (in-shell vs. shelled) to balance damage risk and freight yield. Multi-origin portfolios and bonded inventory near demand centers improve continuity.

**Sustainability as a procurement criterion** Water-use efficiency (drip, regulated deficit irrigation), soil health, and orchard biomass valorization shape buyer shortlists. Hulls/shells to feed/energy, precision irrigation telemetry, and pollinator habitat plans move from CSR rhetoric to measurable KPIs in tenders - especially for retailers with Scope 3 targets.

**R&D and varietal mix matter for the future** Breeding pipelines focus on self-fertile or low-chill varieties, improved shell seal, and cracking performance, aiming to stabilize yield under climate stress and simplify pollination logistics. Post-harvest innovations in rapid drying, cold storage, and modified-atmosphere approaches extend shelf life and reduce quality complaints.

**Risk management and inventory strategy** Alternate bearing cycles and weather shocks necessitate conservative forward sales and quality-tier hedging. Handlers that align pack plans with realistic grade distributions, maintain fungible specs across customers, and use near-real-time QA dashboards minimize write-downs and protect service performance through the crop year.

## Raw Almonds Market Regional Analysis

### North America

Production is concentrated in large, export-oriented orchards with sophisticated irrigation, bee-rental ecosystems, and high-capacity hulling/shelling. Handlers emphasize validated lethality steps compatible with “raw” claims, robust aflatoxin testing, and rapid grading to meet club, natural channel, and e-commerce demand. Sustainability narratives - water budgeting, micro-irrigation, pollinator stewardship - feature prominently in retailer scorecards and brand storytelling.

### Europe

Demand centers on natural snacking, premium confectionery inputs, and bakery usage with stringent aflatoxin and residue compliance. Buyers prioritize lot-level documentation, organic certification, and recyclable packaging. Value accrues to suppliers offering tight count calibrations, consistent light color grades, and sustainability disclosures (water, pollinators, carbon) aligned with retailer programs and eco-labels.

### Asia-Pacific

High-growth import markets balance value and quality across in-shell and shelled formats, with strong seasonal peaks around festivals. Private label and modern trade expand shelf space for whole kernels and almond flour; local roasting/seasoning adds value near point of sale. Importers reward partners with reliable grade continuity, flexible pack sizes, and agile documentation to navigate dynamic customs regimes.

### Middle East & Africa

Regional trading hubs support re-exports and value-added roasting/seasoning operations. Demand mixes premium gifting with everyday snacking, requiring both high-spec kernels and competitively priced in-shell. Suppliers that pair consistent grading with strong food-safety credentials and heat-resilient logistics (temp-controlled storage, rapid port clearance) build durable positions.

### South & Central America

Urban retail and bakery/confectionery segments adopt almond inputs for better-for-you

positioning. Currency swings and freight costs steer buyers toward efficient pack formats and occasional in-shell procurement for value. Partners offering steady quality, multilingual documentation, and technical support for flour/meal applications gain traction with regional processors and modern grocers.

## Raw Almonds Market Segmentation

### By Product

Pieces

Paste

Flour

Milk

Others

### By Application

Snacks and Bars

Milk Substitutes and Ice Creams

Bakery and Confectionery

Nut and Seed Butters

RTE Cereals

Others

### Key Market players

Blue Diamond Growers, Wonderful Pistachios & Almonds (The Wonderful Company), ofi (Olam Food Ingredients), Select Harvests Limited, Almondco Australia, Harris Woolf

Almonds, Treehouse Almonds, Mariani Nut Company, Borges Agricultural & Industrial Nuts, Importaco Nuts, Almendras Llopis, Campos Brothers Farms, Stewart & Jasper Orchards, Travaille & Phippen, Inc., Hilltop Ranch, Inc.

### Raw Almonds Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

### Raw Almonds Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

North America — Raw Almonds market data and outlook to 2034

United States

Canada

Mexico

Europe — Raw Almonds market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Raw Almonds market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Raw Almonds market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Raw Almonds market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

### Research Methodology

This study combines primary inputs from industry experts across the Raw Almonds value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Raw Almonds industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in

shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Raw Almonds Market Report

Global Raw Almonds market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Raw Almonds trade, costs, and supply chains

Raw Almonds market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Raw Almonds market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Raw Almonds market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Raw Almonds supply chain analysis

Raw Almonds trade analysis, Raw Almonds market price analysis, and Raw Almonds supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Raw Almonds market news and developments

## Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

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