

Hazelnut Market Forecasts to 2032 – Global Analysis By Type (Whole Hazelnut, Hazelnuts in Shell, Blanched Hazelnut, Hazelnut Paste, Hazelnut Oil, Hazelnut Flour and Hazelnut Butter), Form, Quality Grade, Packaging Type, Distribution Channel, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Hazelnut Market is accounted for \$12.8 billion in 2025 and is expected to reach \$22.9 billion by 2032 growing at a CAGR of 8.7% during the forecast period. Hazelnuts are edible tree nuts produced by the hazel tree, primarily from the species *Corylus avellana*. They are characterized by a hard outer shell and a flavorful kernel rich in healthy fats, protein, vitamins, and minerals. Hazelnuts are consumed raw, roasted, or processed into products such as spreads, confectionery, and oils. Known for their distinct taste, they hold culinary and nutritional significance worldwide. Their cultivation requires temperate climates with well-drained soils.

According to the International Nut and Dried Fruit Council (INC), climate-related supply volatility in key producing regions and rising demand from the confectionery and plant-based dairy industries are significantly impacting global prices and availability.

Market Dynamics:

Driver:

Growing demand from bakery and snack industries

The hazelnut market is propelled by increasing utilization in bakery, confectionery, and snack products, where their distinct flavor and nutritional profile enhance value. Rising consumer preference for premium bakery goods, chocolates, and plant-based snacks boosts demand significantly. Global food manufacturers are incorporating hazelnuts into diverse formulations, expanding usage across both traditional and innovative offerings. Additionally, health-conscious trends favoring nuts for protein and antioxidants further stimulate adoption. Thus, the bakery and snack industry remains a vital driver of hazelnut market growth.

Restraint:

High vulnerability to weather-driven crop losses

A key restraint for the hazelnut market lies in its sensitivity to weather conditions, which often leads to unpredictable crop yields. Hazelnut cultivation is highly vulnerable to frost, drought, and hailstorms, particularly in dominant producing regions like Turkey and Italy. Climate change exacerbates risks, creating volatility in supply and pricing. This dependency on stable weather patterns challenges consistent availability. Consequently, production fluctuations can impact global trade, limiting growth potential and creating supply-side uncertainty for both manufacturers and distributors.

Opportunity:

Rising demand for hazelnut-based spreads globally

The market presents robust opportunities with surging global demand for hazelnut-based spreads, led by iconic brands like Nutella and expanding private labels. Consumer preference for indulgent yet healthier spreads drives strong market traction, especially among younger demographics. Additionally, the trend toward versatile breakfast options and on-the-go snacking reinforces spread consumption. Expanding retail distribution across emerging economies further broadens accessibility. With increasing applications beyond spreads into dairy, desserts, and beverages, hazelnut spreads represent a lucrative avenue fueling long-term growth opportunities.

Threat:

Geopolitical instability affecting supply chains

Geopolitical uncertainties present significant threats to the hazelnut market, particularly

as top producers are concentrated in regions susceptible to political and trade disruptions. Issues such as export restrictions, tariffs, and regional conflicts can disrupt supply continuity. Currency fluctuations in major producing countries further destabilize pricing for international buyers. This volatility creates challenges for global manufacturers relying on consistent raw material flows. Hence, geopolitical instability remains a critical threat, undermining smooth supply chains and posing risks to market stability.

Covid-19 Impact:

The COVID-19 pandemic created mixed implications for the hazelnut market. Initial disruptions in logistics and export channels hindered distribution, particularly across Europe and Asia. However, rising at-home consumption of bakery products, chocolates, and spreads significantly boosted demand. E-commerce channels emerged as critical sales enablers, offsetting traditional retail slowdowns. Moreover, heightened consumer interest in nutrient-rich foods supported nut consumption. Post-pandemic, renewed supply chain resilience and digital retail expansion have sustained momentum, keeping hazelnuts in strong demand within global food sectors.

The whole hazelnut segment is expected to be the largest during the forecast period

The whole hazelnut segment is expected to account for the largest market share during the period, forecast propelled by its widespread use in confectionery, bakery, and snack applications. Whole hazelnuts are preferred for premium chocolates, pralines, and energy bars, reinforcing their dominance in value-added products. Their visual appeal, texture, and nutritional richness enhance product differentiation, especially in artisanal and gourmet offerings. Additionally, whole hazelnuts are gaining traction in retail packs for direct consumption, driving consistent growth across global markets.

The unroasted segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the unroasted segment is predicted to witness the highest growth rate, influenced by rising consumer demand for minimally processed and health-focused foods. Unroasted hazelnuts retain natural antioxidants and nutrients, making them attractive to health-conscious buyers. Expanding applications in dairy alternatives, plant-based beverages, and clean-label products further enhance adoption. Moreover, growing preference in industrial formulations where customized roasting is performed boosts demand. Consequently, unroasted hazelnuts are positioned as a dynamic

growth segment within global markets.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, fuelled by rising consumption in bakery, snacks, and confectionery industries. Rapid urbanization and growing disposable incomes in China, India, and Southeast Asia elevate demand for premium food products. Expanding middle-class consumer bases favor indulgent yet nutritious nut-based products, strengthening market expansion. Additionally, regional investments in food processing industries bolster utilization. Asia Pacific's strong retail and foodservice sector reinforces its leadership in the hazelnut market.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by increasing popularity of plant-based diets and nut-based innovations. The U.S. and Canada are witnessing rising demand for hazelnuts in snacks, dairy alternatives, spreads, and beverages. Strong consumer preference for clean-label and organic products amplifies adoption. Furthermore, strategic collaborations between food manufacturers and retail chains broaden availability. Supported by high purchasing power and evolving dietary trends, North America emerges as the fastest-growing hazelnut market.

Key players in the market

Some of the key players in Hazelnut Market include Ferrero International S.A., Olam International Ltd., Balsu Gida Sanayi ve Tic. A.S., Barry Callebaut AG, Nestlé S.A., Gerbs, LLC, Intersnack Group GmbH & Co. KG, Kerry Group plc, American Hazelnut Company, B&G Foods, Inc., Mondelez International, Inc., John B. Sanfilippo & Son, Inc., The Hershey Company, Callebaut, Nutkao S.r.l., Agrimontana, Valrhona, Olam Cocoa, Daarnhouwer Group, and Alpavit.

Key Developments:

In August 2025, Ferrero International S.A. expanded its sustainable hazelnut sourcing initiatives, partnering with growers in Turkey to improve yield and quality while supporting local communities through training and resource investment.

In July 2025, Olam International Ltd. launched a digital platform for hazelnut supply chain transparency, allowing traceability from farm to consumer to enhance quality control and sustainability.

In June 2025, Balsu Gida Sanayi ve Tic. A.S. introduced new hazelnut processing technologies to increase nut shelf life and product consistency for international export markets.

Types Covered:

Whole Hazelnut

Hazelnuts in Shell

Blanched Hazelnut

Hazelnut Paste

Hazelnut Oil

Hazelnut Flour

Hazelnut Butter

Forms Covered:

Roasted

Unroasted

Quality Grades Covered:

Premium

Standard

Economy

Packaging Types Covered:

Bulk Packaging

Consumer Packaging

Retail Packaging

Distribution Channels Covered:

Supermarkets/Hypermarkets

Convenience Stores

Online Retail

Wholesalers/Distributors

Applications Covered:

Confectionery

Bakery Products

Beverages

Dairy & Frozen Desserts

Nut & Seed Snacks

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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