

Year-To-Date Shipment / Inventory Report In Tons

Marketing Month: 6		Crop: 2025
Carry in from previous year	15,000	
Total Production	225,000	
Gross Inventory	240,000	
Domestic Consumption	(16,000)	
Export Shipments	(80,000)	
Export Adjustments/Losses*	(22,000)	
Total Consumption	(118,000)	
Ending Inventory	122,000	

*Export Adjustments/Losses related to shelling and peeling process of kernels and green kernels.

Source: Export Shipments based on IRI Customs Administration data. All other figures are IPA estimates.

Monthly and YTD Export Shipments Compared to Last 6 Years- In Tons

Marketing Month: 6		Crop: 2025		
Crop	In-Shell Equivalent		Kernel Equivalent	
	Monthly	YTD	Monthly	YTD
2025	8,756	102,247	4,525	52,624
2024	20,336	143,799	10,239	73,658
2023	14,363	82,107	7,318	43,032
2022	6,821	46,577	3,477	24,222
2021	10,629	82,194	5,421	42,699
2020	25,696	158,968	13,413	83,293

Market Analysis

1. 6th marketing month's shipments (20 Feb – 20 Mar) capped at 9,000 MT of in-shell equivalent pistachios, marking a 55% decline compared to the same month last year. Following the outbreak of war on Iran on February 28, shipping out of Bandar Abbas port became increasingly restricted and effectively stopped by mid-March as traffic through the Strait of Hormuz collapsed. However, shipments by truck, especially through Türkiye continued, though with 7-10 days of extra wait time compared to pre-war norms.
2. Year-to-date export shipments (Sep. 2025 - Feb. 2026) reached 102,000 MT of in-shell equivalent pistachios, representing a 29% decrease compared with the previous year. The year-to-date export-to-opening-inventory ratio stands at 43%, compared to 63% for the previous year and 55% five-year average (2020-2024).
3. Exports to Türkiye, the CIS, and the Indian subcontinent remain strong, with their combined market share increasing year-on-year. In contrast, the Far East has experienced a significant decline, with its share from year-to-date Iranian pistachio exports falling from 25% last marketing year to 8% this year.
4. Due to hostilities and the stop of shipments to kernel-consuming destinations, such as UAE and Persian Gulf countries, share of kernel exports during the 6th marketing month decreased to 42% from 57% for the previous month. Should the normal trend have continued, the average share of kernel shipments from total exports for the full marketing year should have surpassed the 50% mark for the first time, however, because of the war, we expect this ratio to remain below 50% for the full year, but still higher than the last four-year average of 41%.
5. During February and March, when Iran prepares for the Norouz festivities, domestic sales experience their peak season. However, due to the war, a substantial decline in expected domestic consumption must have occurred during this period.
6. The remaining inventory at the end of the sixth marketing month is estimated at 122,000 MT of in-shell pistachios, which will translate into an unprecedented carry-over at the end of the marketing year. The ongoing day-to-day operational challenges, along with uncertainties arising from the shaky ceasefire, continue to limit the exports for an unforeseeable future.

Monthly and YTD Export Shipments - Product / Destination Breakdown in Tons

Marketing Month: 6

Crop: 2025

Product Destination	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Re-Export Markets	266	8,851	111	3,036	620	8,212	27	334	18	140	1,716	29,451	859	14,862
CIS	3,170	21,414	8	8	39	678	-	1	-	2	3,255	22,782	1,754	12,248
Indian Subcontinent	694	13,118	-	5	499	4,760	-	-	-	-	1,692	22,642	874	11,846
Middle East	728	5,539	-	25	264	3,470	4	29	-	31	1,267	12,621	661	6,532
Far East	171	5,956	-	1,025	68	381	3	63	-	11	314	7,945	163	4,143
EU-27	0	24	-	-	22	746	88	939	-	1	308	4,335	110	1,699
Other Europe	62	571	-	-	39	326	-	6	-	3	141	1,245	73	643
North America	-	65	-	-	-	92	-	-	-	1	-	250	-	128
South America	6	73	-	-	19	114	-	-	-	14	44	315	22	168
North Africa	-	73	-	16	-	48	-	-	-	-	-	185	-	95
Other	-	118	-	-	10	157	-	2	-	37	20	475	10	260
Total	5,097	55,802	119	4,115	1,579	18,984	122	1,374	18	240	8,756	102,247	4,525	52,624

Compiled by: IPA based on IRI Customs Administration raw data

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
Far East															
China	150	3,152	-	525	43	148	-	43	-	2	236	4,104	124	2,137	
Hong Kong	-	2,200	-	425	-	67	-	3	-	0	-	2,769	-	1,278	
Indonesia	21	74	-	-	25	95	-	-	-	1	71	266	36	136	
Japan	-	1	-	-	-	-	2	15	-	-	5	46	2	15	
Korea	-	-	-	-	-	4	-	-	-	-	-	9	-	4	
Macao	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Malaysia	-	72	-	-	-	30	-	0	-	4	-	136	-	73	
Philippines	-	-	-	-	-	1	-	-	-	3	-	5	-	4	
Singapore	-	111	-	-	-	23	-	-	-	1	-	157	-	83	
Taiwan	-	1	-	-	-	-	1	2	-	0	3	8	1	3	
Thailand	-	-	-	-	-	12	-	-	-	-	-	25	-	12	
Vietnam	-	345	-	75	-	-	-	-	-	-	-	420	-	190	
Far East - Total	171	5,956	-	1,025	68	381	3	63	-	11	314	7,945	163	3,719	
Far East - %	3%	11%	0%	25%	0%	0%	0%	0%	0%	0%	4%	8%	4%	7%	
Indian Subcontinent															
Afghanistan	104	993	-	-	-	44	-	-	-	-	104	1,082	56	581	
Bangladesh	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
India	321	6,794	-	5	383	4,414	-	-	-	-	1,087	15,627	556	8,085	
Nepal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Pakistan	269	5,331	-	-	116	301	-	-	-	-	500	5,934	261	3,180	
Sri Lanka	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Indian Subcontinent - Total	694	13,118	-	5	499	4,760	-	-	-	-	1,692	22,642	874	11,846	
Indian Subcontinent - %	14%	24%	0%	0%	0%	0%	0%	0%	0%	0%	19%	22%	19%	23%	

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
EU27															
Austria	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Belgium	-	-	-	-	-	-	-	80	-	-	-	240	-	80	
Bulgaria	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Croatia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Cyprus	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Czech Republic	-	-	-	-	-	17	-	-	-	-	-	33	-	17	
Denmark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Estonia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Finland	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
France	-	24	-	-	-	-	-	-	-	-	-	24	-	13	
Germany	-	0	-	-	-	203	88	859	-	-	263	2,984	88	1,062	
Greece	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Hungary	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Ireland	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Italy	-	-	-	-	-	158	-	-	-	0	-	316	-	158	
Latvia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Lithuania	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Luxembourg	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Malta	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Netherlands	-	-	-	-	-	-	-	-	-	0	-	0	-	0	
Poland	-	-	-	-	22	89	-	-	-	-	44	178	22	89	
Portugal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Romania	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Slovakia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Slovenia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Spain	-	-	-	-	-	280	-	-	-	-	-	560	-	280	
Sweden	0	0	-	-	0	0	0	0	-	-	0	0	0	0	
EEC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
EU27 - Total	0	24	-	-	22	746	88	939	-	1	308	4,335	110	1,699	
EU27 - %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	4%	2%	3%	

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
CIS															
Armenia	-	32	8	8	-	20	-	1	-	2	8	84	4	44	
Azerbaijan	17	113	-	-	0	0	-	-	-	-	18	113	9	61	
Georgia	20	381	-	-	-	-	-	-	-	-	20	381	11	206	
Kazakhstan	714	5,040	-	-	5	99	-	-	-	-	724	5,238	391	2,821	
Kyrgyzstan	895	5,488	-	-	1	14	-	-	-	-	897	5,516	485	2,977	
Russia	832	4,909	-	-	32	529	-	-	-	0	896	5,967	481	3,180	
Tajikistan	-	349	-	-	-	-	-	-	-	-	-	349	-	188	
Turkmenistan	-	482	-	-	-	5	-	-	-	-	-	492	-	265	
Uzbekistan	692	4,619	-	-	-	11	-	-	-	-	692	4,642	374	2,506	
CIS - Total	3,170	21,414	8	8	39	678	-	1	-	2	3,255	22,782	1,754	12,248	
CIS - %	62%	38%	0%	0%	0%	0%	0%	0%	0%	0%	37%	22%	39%	23%	
Middle East															
Bahrain	-	46	-	-	-	0	-	-	-	1	-	47	-	26	
Iraq	644	4,087	-	-	115	2,284	-	1	-	28	874	8,684	463	4,519	
Jordan	13	362	-	-	12	235	-	-	-	-	37	832	19	430	
Kuwait	11	209	-	-	3	151	3	12	-	2	26	551	12	279	
Lebanon	42	347	-	25	75	383	-	-	-	-	192	1,138	98	582	
Oman	10	82	-	-	-	26	-	6	-	-	10	150	5	76	
Qatar	9	58	-	-	23	41	1	10	-	0	58	171	29	83	
Saudi Arabia	-	24	-	-	10	32	-	-	-	-	20	88	10	45	
Syria	-	300	-	-	25	317	-	-	-	-	50	935	25	479	
Yemen	-	25	-	-	-	-	-	-	-	-	-	25	-	14	
Middle East - Total	728	5,539	-	25	264	3,470	4	29	-	31	1,267	12,621	661	6,532	
Middle East - %	14%	10%	0%	1%	0%	0%	0%	0%	0%	0%	14%	12%	15%	12%	

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
Re-Export Markets															
Turkey	170	5,799	111	2,740	391	3,980	25	165	14	84	1,152	17,079	573	8,621	
UAE	96	3,051	-	296	229	4,231	2	169	3	56	563	12,372	286	6,240	
REM - Total	266	8,851	111	3,036	620	8,212	27	334	18	140	1,716	29,451	859	14,862	
REM - %	5%	16%	0%	74%	0%	0%	0%	0%	0%	0%	20%	29%	19%	28%	
Other Europe															
Albania	2	102	-	-	-	10	-	-	-	-	2	123	1	65	
Belarus	60	195	-	-	1	1	-	-	-	-	62	197	33	106	
Bosnia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Iceland	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Kosovo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Macedonia	-	8	-	-	-	1	-	-	-	-	-	9	-	5	
Moldova	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Montenegro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Norway	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Serbia	-	204	-	-	-	61	-	-	-	-	-	325	-	171	
Switzerland	-	7	-	-	-	2	-	1	-	-	-	15	-	7	
UK	-	27	-	-	38	225	-	5	-	3	77	494	38	247	
Ukraine	-	29	-	-	-	26	-	-	-	-	-	81	-	42	
Other Europe - Total	62	571	-	-	39	326	-	6	-	3	141	1,245	73	643	
Other Europe - %	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%	2%	1%	
North America															
Canada	-	54	-	-	-	39	-	-	-	-	-	132	-	68	
Mexico	-	12	-	-	-	53	-	-	-	1	-	119	-	60	
USA	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
North America - Total	-	65	-	-	-	92	-	-	-	1	-	250	-	128	
North America - %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
South America															
Brazil	6	73	-	-	19	94	-	-	-	14	44	275	22	148	
Chile	-	-	-	-	-	20	-	-	-	-	-	40	-	20	
Argentina	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Colombia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Ecuador	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Paraguay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Uruguay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Venezuela	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
South America - Total	6	73	-	-	19	114	-	-	-	14	44	315	22	168	
South America - %	0%	0%	0%	0%	1%	1%	0%	0%	0%	6%	1%	0%	0%	0%	
North Africa															
Algeria	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Egypt	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Libya	-	73	-	-	-	12	-	-	-	-	-	96	-	51	
Morocco	-	-	-	16	-	-	-	-	-	-	-	16	-	7	
Nigeria	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Sudan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Tunisia	-	-	-	-	-	36	-	-	-	-	-	73	-	36	
North Africa - Total	-	73	-	16	-	48	-	-	-	-	-	185	-	95	
North Africa - %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons

Marketing Month: 6												Crop: 2025			
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total (In-Shell Equivalent)		Total (Kernel Equivalent)		
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	
Other															
Australia	-	117	-	-	-	21	-	2	-	37	-	201	-	123	
Dominican Republic	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Kenya	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Liberia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
New Zealand	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Nicaragua	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other_1	-	1	-	-	10	110	-	-	-	-	20	221	10	111	
Other_2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other_3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other_4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Panama	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Senegal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
South Africa	-	-	-	-	-	27	-	-	-	-	-	53	-	27	
Tanzania	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other - Total	-	118	-	-	10	157	-	2	-	37	20	475	10	260	
Other - %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Total Iranian Export	5,097	55,802	119	4,115	1,579	18,984	122	1,374	18	240	8,756	102,247	4,525	52,624	

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