

Year-To-Date Shipment / Inventory Report In Tons

Marketing Month: 11		Crop: 2024
Carry in from previous year		30,000
Total Production		200,000
Gross Inventory		230,000
Domestic Consumption		(28,000)
Export Shipments		(154,000)
Export Adjustments/Losses*		(38,000)
Total Consumption		(220,000)
Ending Inventory		10,000

*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 4 Years- In Tons

Marketing Month: 11		Crop: 2024
Crop	Monthly	YTD
2024	6,024	154,237
2023	7,792	102,726
2022	2,588	52,695
2021	2,686	85,149
2020	7,959	192,703

Market Analysis

1. Export shipments in the 11th marketing month (July 22–August 22) approached 6,000 MT. During this month, the market continued along the trend observed in the preceding months; In-shell pistachio trade remained sluggish with high prices & limited supply, while pistachio kernel demand stayed robust and continued to drive exports across nearly all destinations. Monthly kernel shipments (in-shell equivalent), accounted for almost two-thirds of total monthly exports. One exception, was the Indian Subcontinent with relatively higher demand for in-shell pistachios, likely linked to pre-Diwali purchases.

2. YTD export shipments reached 192,000 MT of in-shell equivalent pistachios, a 54% increase compared to the previous year, signifying an exceptional marketing year for Iranian pistachio industry. Competitive prices of Iranian pistachios, limited supply from other origins, and a fast increase in worldwide consumption of Iranian pistachio kernels by the global food industry have been the main reasons for this achievement. With one month remaining and the figures showing a scant 10,000 MT of inshell equivalent inventory as of August 22, IPA will definitely need to revise its previous estimate of the 2024 crop by year-end.

3. The in-shell pistachio market remains stagnant in anticipation of the new crop, as volatility in the USD/IRR exchange rate has deepened uncertainty in the local market. Meanwhile, strong demand for different types of kernels is the major market driver for Iranian pistachios.

2025 Crop

1. IPA's official pre-harvest forecast of the 2025 Iranian pistachio crop stands at 240,000 MT of dried in-shell pistachios. The new crop is expected to consist of 55% Long Varieties (30% Ahmad Aghayi, 15% Akbari, 10% other long) and 45% Round Varieties (30% Round, 15% Jumbo). The Jumbo variety seems to be experiencing an exceptional on-year in most producing areas, while a relative underperformance of Akbari variety is expected due to the heat wave during bloom in April 2025.

2. Harvest of unripe (Kaal) pistachios started in August and is nearly its end. Volume-wise, a smaller amount of unripe crop seems to have been harvested this year, while prices are noticeably higher than the 2024 crop. This dynamic could play a key role in shaping supply and demand trends for the GPPK market over the coming weeks. The definition of 'Kaal' has broadened: once limited to early-picked blanched green peeled pistachio kernels intended mainly for the EU, it now spans from premium super-green early-harvests to mid-season varieties with higher yields but less green color, driven by demand from the Middle East and India.

3. Harvest of the new crop is underway in the warmer regions of Khorasan province, with Kerman province joining in. In Khorasan, the percentage of blanks and floaters is reported to be somewhat higher, with smaller nut size compared to last year, resulting from irrigation interruptions due to electricity shortages. In Kerman, the quality of crop 2025 is reported to be good, with lower percentage of closed shells and floaters compared to last year.

Monthly and YTD Export Shipments - Product / Destination Breakdown in Tons												
Marketing Month: 11											Crop: 2024	
Product Destination	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Far East	64	24,426	-	10,987	138	1,226	4	124	5	30	212	36,793
Re-Export Markets	145	15,232	45	7,109	968	12,528	44	889	74	387	1,276	36,145
CIS	1,949	30,607	-	-	171	1,304	7	40	1	23	2,127	31,974
Indian Subcontinent	715	19,168	-	100	152	6,569	0	53	-	-	867	25,890
Middle East	308	8,434	-	223	306	5,599	3	92	4	110	622	14,458
EU-27	0	373	-	327	392	2,610	241	1,803	-	0	633	5,112
Other Europe	26	947	-	-	81	438	-	6	2	2	110	1,393
North America	17	468	-	-	93	786	-	12	-	0	110	1,266
North Africa	-	503	-	21	-	156	-	-	-	-	-	680
South America	-	80	-	-	-	41	-	-	-	-	-	121
Other	30	166	-	-	37	217	-	16	1	6	68	406
Total	3,254	100,404	45	18,767	2,339	31,472	298	3,036	88	559	6,024	154,237

Compiled by: IPA based on IRI Customs Administration raw data

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11											Crop: 2024	
Product Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Far East												
China	-	18,310	-	8,725	102	702	3	82	-	3	105	27,822
Hong Kong	-	4,536	-	1,913	14	326	-	8	-	0	14	6,783
Indonesia	11	79	-	-	4	29	-	3	-	1	15	112
Japan	-	16	-	-	-	1	-	28	-	-	-	44
Korea	-	-	-	-	-	3	-	-	-	-	-	3
Macao	-	-	-	-	-	-	-	-	-	-	-	-
Malaysia	25	145	-	-	5	53	-	1	2	6	33	205
Philippines	-	-	-	-	1	1	-	-	3	19	4	20
Singapore	28	257	-	-	4	40	-	-	-	0	32	297
Taiwan	-	35	-	-	-	-	1	2	-	0	1	37
Thailand	-	-	-	-	9	70	-	-	-	-	9	70
Vietnam	-	1,050	-	350	-	-	-	-	-	-	-	1,400
Far East - Total	64	24,426	-	10,987	138	1,226	4	124	5	30	212	36,793
Far East - %	2%	24%	0%	59%	0%	0%	0%	0%	0%	0%	4%	24%
Indian Subcontinent												
Afghanistan	28	2,210	-	-	-	34	0	1	-	-	28	2,246
Bangladesh	-	-	-	-	-	-	-	-	-	-	-	-
India	596	10,682	-	100	152	6,079	-	41	-	-	749	16,901
Nepal	-	-	-	-	-	-	-	-	-	-	-	-
Pakistan	90	6,276	-	-	-	455	-	11	-	-	90	6,743
Sri Lanka	-	-	-	-	-	-	-	-	-	-	-	-
Indian Subcontinent - Total	715	19,168	-	100	152	6,569	0	53	-	-	867	25,890
Indian Subcontinent - %	22%	19%	0%	1%	0%	0%	0%	0%	0%	0%	14%	17%

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11											Crop: 2024	
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
EU27												
Austria	-	6	-	-	-	-	-	-	-	-	-	6
Belgium	-	-	-	-	20	52	40	168	-	-	60	220
Bulgaria	-	-	-	-	-	1	-	-	-	-	-	1
Croatia	-	-	-	-	-	-	-	-	-	-	-	-
Cyprus	-	-	-	-	-	-	-	-	-	-	-	-
Czech Republic	-	-	-	-	-	-	-	-	-	-	-	-
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
Estonia	-	-	-	-	-	-	-	-	-	-	-	-
Finland	-	-	-	-	-	-	-	-	-	-	-	-
France	-	0	-	-	-	7	-	-	-	-	-	7
Germany	-	270	-	98	285	1,644	201	1,607	-	0	486	3,618
Greece	-	14	-	-	22	50	-	23	-	-	22	87
Hungary	-	-	-	-	-	-	-	-	-	-	-	-
Ireland	-	-	-	-	-	-	-	-	-	-	-	-
Italy	-	11	-	229	-	268	-	-	-	-	-	507
Latvia	-	-	-	-	-	-	-	-	-	-	-	-
Lithuania	-	-	-	-	-	-	-	-	-	-	-	-
Luxembourg	-	-	-	-	-	-	-	-	-	-	-	-
Malta	-	-	-	-	-	-	-	-	-	-	-	-
Netherlands	-	-	-	-	-	-	-	-	-	-	-	-
Poland	-	-	-	-	22	89	-	-	-	-	22	89
Portugal	-	-	-	-	-	-	-	-	-	-	-	-
Romania	-	-	-	-	-	-	-	-	-	-	-	-
Slovakia	-	-	-	-	-	-	-	-	-	-	-	-
Slovenia	-	-	-	-	-	-	-	-	-	-	-	-
Spain	-	72	-	-	43	497	-	5	-	-	43	574
Sweden	0	0	-	-	-	2	-	0	-	-	0	3
EEC	-	-	-	-	-	-	-	-	-	-	-	-
EU27 - Total	0	373	-	327	392	2,610	241	1,803	-	0	633	5,112
EU27 - %	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	11%	3%

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11										Crop: 2024		
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
CIS												
Armenia	-	107	-	-	10	31	7	10	1	1	17	149
Azerbaijan	-	180	-	-	-	-	-	-	-	-	-	180
Georgia	88	963	-	-	0	41	-	8	-	-	88	1,013
Kazakhstan	412	8,701	-	-	44	336	-	4	-	22	455	9,064
Kyrgyzstan	740	7,771	-	-	2	27	-	-	-	-	742	7,798
Russia	478	7,752	-	-	115	868	-	18	-	1	592	8,638
Tajikistan	12	1,392	-	-	-	-	-	-	-	-	12	1,392
Turkmenistan	16	671	-	-	-	-	-	-	-	-	16	671
Uzbekistan	204	3,071	-	-	-	-	-	-	-	-	204	3,071
CIS - Total	1,949	30,607	-	-	171	1,304	7	40	1	23	2,127	31,974
CIS - %	60%	30%	0%	0%	0%	0%	0%	0%	0%	0%	35%	21%
Middle East												
Bahrain	-	59	-	-	-	1	-	1	0	1	0	63
Iraq	168	6,013	-	199	263	3,514	-	2	3	93	433	9,822
Jordan	-	327	-	-	-	533	-	0	-	-	-	860
Kuwait	69	768	-	-	19	351	-	20	1	6	90	1,144
Lebanon	24	482	-	24	22	820	-	24	-	-	46	1,350
Oman	9	214	-	-	-	43	-	6	-	-	9	262
Qatar	38	325	-	-	2	86	3	40	-	10	44	460
Saudi Arabia	-	161	-	-	-	-	-	-	-	-	-	161
Syria	-	84	-	-	-	251	-	-	-	-	-	335
Yemen	-	-	-	-	-	-	-	-	-	-	-	-
Middle East - Total	308	8,434	-	223	306	5,599	3	92	4	110	622	14,458
Middle East - %	9%	8%	0%	1%	0%	0%	0%	0%	0%	0%	10%	9%

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11										Crop: 2024		
Product Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Re-Export Markets												
Turkey	135	9,725	45	5,880	366	5,080	21	349	73	362	640	21,396
UAE	9	5,508	-	1,229	602	7,447	23	540	2	24	636	14,748
REM - Total	145	15,232	45	7,109	968	12,528	44	889	74	387	1,276	36,145
REM - %	4%	15%	0%	38%	0%	0%	0%	0%	0%	0%	21%	23%
Other Europe												
Albania	-	128	-	-	-	7	-	-	-	-	-	135
Belarus	24	147	-	-	1	1	-	-	-	-	25	148
Bosnia	-	-	-	-	-	-	-	-	-	-	-	-
Iceland	-	-	-	-	-	-	-	-	-	-	-	-
Kosovo	-	-	-	-	-	-	-	-	-	-	-	-
Macedonia	-	63	-	-	-	-	-	-	-	-	-	63
Moldova	-	9	-	-	-	1	-	-	-	-	-	10
Montenegro	-	-	-	-	-	-	-	-	-	-	-	-
Norway	-	-	-	-	-	-	-	-	-	-	-	-
Serbia	2	382	-	-	5	96	-	-	-	-	7	478
Switzerland	0	5	-	-	-	-	-	1	-	-	0	7
UK	-	92	-	-	68	260	-	5	2	2	70	359
Ukraine	-	120	-	-	7	73	-	-	-	-	7	193
Other Europe - Total	26	947	-	-	81	438	-	6	2	2	110	1,393
Other Europe - %	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%
North America												
Canada	5	395	-	-	82	694	-	12	-	0	87	1,101
Mexico	12	73	-	-	11	92	-	-	-	-	23	165
USA	-	-	-	-	-	-	-	-	-	-	-	-
North America - Total	17	468	-	-	93	786	-	12	-	0	110	1,266
North America - %	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11											Crop: 2024	
Product Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
South America												
Brazil	-	59	-	-	-	39	-	-	-	-	-	98
Chile	-	21	-	-	-	2	-	-	-	-	-	23
Argentina	-	-	-	-	-	-	-	-	-	-	-	-
Colombia	-	-	-	-	-	-	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-	-	-	-	-	-	-
Paraguay	-	-	-	-	-	-	-	-	-	-	-	-
Uruguay	-	-	-	-	-	-	-	-	-	-	-	-
Venezuela	-	-	-	-	-	-	-	-	-	-	-	-
South America - Total	-	80	-	-	-	41	-	-	-	-	-	121
South America - %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
North Africa												
Algeria	-	45	-	-	-	-	-	-	-	-	-	45
Egypt	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-
Libya	-	445	-	-	-	156	-	-	-	-	-	601
Morocco	-	13	-	21	-	-	-	-	-	-	-	34
Nigeria	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	-	-	-	-	-	-	-	-	-	-	-	-
Tunisia	-	-	-	-	-	-	-	-	-	-	-	-
North Africa - Total	-	503	-	21	-	156	-	-	-	-	-	680
North Africa - %	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Monthly and YTD Export Shipments - Product / Country Breakdown in Tons												
Marketing Month: 11											Crop: 2024	
Country	Open In-Shell		Closed Shell		Kernel		GPPK & Split K.		Others		Total	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Other												
Australia	14	103	-	-	0	41	-	4	1	6	16	154
Dominican Republic	-	-	-	-	-	-	-	-	-	-	-	-
Kenya	-	-	-	-	-	-	-	-	-	-	-	-
Liberia	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-	-	-	-	-	-	-
Nicaragua	-	-	-	-	-	-	-	-	-	-	-	-
Other_1	15	63	-	-	37	167	-	-	-	-	52	230
Other_2	-	-	-	-	-	-	-	-	-	-	-	-
Other_3	-	-	-	-	-	-	-	-	-	-	-	-
Other_4	-	-	-	-	-	-	-	-	-	-	-	-
Panama	-	-	-	-	-	-	-	-	-	-	-	-
Senegal	-	-	-	-	-	-	-	-	-	-	-	-
South Africa	-	0	-	-	-	9	-	13	-	-	-	22
Tanzania	-	-	-	-	-	-	-	-	-	-	-	-
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
Other - Total	30	166	-	-	37	217	-	16	1	6	68	406
Other - %	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Total Iranian Export	3,254	100,404	45	18,767	2,339	31,473	298	3,036	88	559	6,024	154,237

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