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REDSUN PECAN POST-2026 NEWSLETTER #2 May

HIGHLIGHTS OF THIS REPORT

World estimated pecan production 2026

Industry development of processing pecans in China

Nickel content of pecans to European Union

The South African pecan crop of 2026 is starting

World estimated pecan production 2026

The world pecan production for 2026 is expected to be 326,950mt of nut in shell (NIS).
The production is made up as follows (mt of NIS)

Country	mt NIS Estimate 2026	mt NIS 2025 crop
USA	130,000 mt	115,000 mt
Mexico	111,250 mt	110,000 mt
South Africa	53,310 mt	47,541 mt
China	11,700 mt	8,500 mt
Brazil	10,000 mt	5,000 mt
Australia	3,400 mt	3,434 mt
Others	3,800 mt	3,400 mt
Total	326,950	288,934 mt

Source is INC Congress 2026 and 2025

The USA production shows a 12% growth over the 2025 crop size. The overall crop is still stressed as a result of the various natural disasters that tore down the pecan trees during 2024. This recovery is slowly showing into high production volumes.

Mexico shows very little growth in crop size, caused mainly by drought conditions. There is no planting of new trees taking place in USA or Mexico.

South Africa continues to grow in production hectares. The impressive growth in production originates from the trees planted in 2015, when a record number of 550,000 new pecan trees were sold to farmers by registered nurseries. Tree sales to farmers has since slowed. However, trees continue to come into production for the first time after 9-10 years. This trend will continue to give SA continued volume growth in pecans. 70,000 mt of NIS is possible by the year 2030.

China is another pecan origin that is showing impressive growth. It has not achieved the same growth as the macadamias in China which has now reached over 100,000 mt in 2026 to become the world leading producer of macadamias. However, there are new pecan plantings happening in China and we have seen 5-6 year old trees looking very healthy, forming part of a 5,000ha orchard. These trees will come into bearing in the next 4-5 years, adding substantially to the production volumes.

Industry development of processing pecans in China

South Africa exports 95% of our pecan crop in shell to China each year. There are limited pecan shelling facilities in South Africa. It is an area of potential growth for South Africa which will be watched carefully in the years to come.

In China, the NIS is cracked and roasted, then sold as a flavoured NIS to the market in China. A growing market in China is the pecan kernel market. This represents about 40% of the pecan market (and growing). China has now developed a very efficient shelling industry with impressive whole half recovery ratios.

We are also seeing South African origin kernel, shelled in China being sold to countries outside of China. This is a growing trend and the target for 2026 is for China to export 10% of imported SA pecans, as shelled kernel to countries outside of China.

Nickel content of pecans to European Union.

EU Regulation 2024/1987 deals with the maximum nickel content of tree nuts imported into the EU. The maximum limit permitted is 3,5 ppm of nickel. For many nuts such as almonds, macadamias and others this is easily achieved. However, there are 6 tree nut types, for which nickel constitutes a micro-nutrient, essential for the growth of the tree, and accordingly, the fruit or the nut. Pecan is in this group.

The Regulation 2024/1987 came into force on 1 June 2025. Since then, pecans have effectively been excluded from the market in the EU. Fortunately, the European Commission has been at work to remedy the situation, to allow the pecans to continue being imported into the EU.

According to our information, effective from 19 June 2026, pecans will be included into the group of tree nuts that will be permitted to be imported into the EU with a nickel content level of 10 ppm. The pecans will join the "exception group" presently comprising cashews, walnuts, chestnuts, Brazil nuts and pine nuts. This is very good news for the pecan market in the EU.

The South African pecan crop of 2026 is starting

Effective from the second week of June 2026, Collectors in South Africa will start buying pecans from farmers to sort and grade for shipment to China. The pecans need a cold snap to drop the leaves from the trees, and to allow the pecans to fall to the ground. At present our temperature range is minimum of 7°C to maximum 27°C. We need the minimum to fall to close to 0°C, even for 1 night. Winter is approaching and therefore, the temperature fall is very likely.

The crop is estimated to be 53,700 mt NIS for South Africa crop 2026. However, the possibility that it will go to 55,000mt is very good.

Recently a 50mm-100mm of rain has fallen in the pecan producing areas. It is not ideal, because it causes milder temperatures and makes access to collect fallen pecans under the trees more challenging. Pecans must also dry to about 3,5% moisture in the orchard, to avoid germination.

Redsun intends to process about 2000mt of NIS from the 2026 crop, with about 50% of it being exported to China as NIS, and the balance to shelled at our shelling factory in Keimoes. This kernel is available for export.

For any further queries, please do not hesitate to contact myself or my colleague Conrad.

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