



PERSPECTIVAS DE MERCADO DE LA NUEZ 2022



Septiembre 2022

GLOSARIO DE TEMAS

- . COMENUEZ : <http://comenuez.com>
- . Los precios de la Nuez se encuentran fijados en mayor medida por el consumo en el Mercado de USA
- . APC - American Pecan Council : <https://americanpecan.com>
- . Interpretación de Reportes APC
- . Producción en USA proyectada para el 2022
- . Producción en MÉXICO proyectada para el ciclo 2022
- . APPB - American Pecan Promotion board : <https://eatpecans.com>
- . Sustentabilidad Financiera
- . Oferta/Demanda ⇒ Percepción de Valor ⇒ “Marketing”

Importación de Nueces Pecanas a USA- Datos del USDA

Pecans: U.S. imports by volume (1,000 pounds)

Volumen "Shelled" Nuez Procesada

Show/hide quarterly totals <input type="checkbox"/>		Quarter 1			Quarter 2			Quarter 3			Quarter 4			Ann
Fresh or dried ¹	Market year*	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
	2021/22	12,924	19,967	15,894	15,837	10,821	9,493	7,520	7,232	8,456	NA	NA	NA	108,143
	2020/21	13,000	16,132	18,559	17,666	12,768	16,014	10,835	8,986	8,711	8,855	9,718	11,079	152,324
	2019/20	13,698	23,603	40,643	28,878	15,397	15,417	9,014	8,660	7,149	6,703	9,338	10,321	188,820
	2018/19	13,680	37,150	41,716	33,665	16,395	9,869	10,257	10,576	11,076	8,120	9,873	9,184	211,562
	2017/18	10,155	22,218	27,526	17,217	14,877	10,019	12,128	9,897	8,883	11,546	8,902	7,855	161,224

Proyección para Sep 2022 si se repite volumen 2021

137,795 millones de libras "Shelled"

275,590 millones de libras "Inshell"

*Considerar que hay cruces dobles en la frontera de nuez que se importa a México a procesar. Este número históricamente se ha cuestionado en su exactitud.

American Pecan Council

<https://americanpecan.com>



Recolecta cuotas de comercialización desde 2017 a todos los productores de USA con mas de 50,000 lbs por \$.03 cts/lb para hacer campaña de Marketing.

A partir del año 2021-22 cobra solamente 1 cts/lb.

El año 2020 tuvo ingresos por cuotas por un total de \$7,936,582 USD y el año 2019 por un total de 8,581,883 USD.

Registra por mandato de Ley todas las operaciones comerciales entre los productores, los comercializadores y los procesadores. Con esto genera información confiable de cuánta nuez se comercializa, se procesa, se contrata y se entrega al consumidor en USA o se exporta a otros países.

No tiene registros de cuánto inventario está en manos de los Productores.



Pecan Research, Promotion and Information Order

Overview

How to Propose a New R&P Program

Membership & Nominations

Proposed Research & Promotion Programs

Program Referenda

Inactive R&P Programs

American Egg Board

American Lamb Board

American Pecan Promotion Board

Cattlemen's Beef Board

Christmas Tree Promotion Board

Cotton Board

[HOME](#) > [RULES & REGULATIONS](#) > [RESEARCH & PROMOTION PROGRAMS](#) > [PECAN RESEARCH, PROMOTION AND INFORMATION ORDER](#)



Attention Assessment Payers

The American Pecan Promotion Board (APPB) is now receiving assessments. Assessments are due the 10th of the month following the end of the previous month. The First Handler/Importer Report Form must be submitted with assessments. Forms and instructions are available below. **All information obtained from books, records or reports, per \$1223.62 of the Order, shall be kept confidential by all persons.**

Upcoming Meeting - If you would like to be notified of the next American Pecan Promotion Board meeting, please contact Alex Ott at aottappb@gmail.com or (817) 985-3034.

The pecan R&P program operates as the American Pecan Promotion Board. The purpose of the program is to strengthen the position of pecans in the marketplace, maintain and expand markets for pecans, and develop new uses for pecans. The program is financed by an assessment on domestic producers and importers of pecans. The initial assessment rate is \$0.02 per pound on inshell pecans and \$0.04 per pound on shelled pecans. Handlers will collect assessments from producers based on pounds of pecans received and importers will pay assessments on pecans when they enter the United States.

Entities that produce or import less than 50,000 pounds of inshell pecans, 25,000 pounds of shelled pecans, or a combination of the two, on average for four fiscal periods will be exempt from paying assessments. If combining shelled and inshell, pounds must be converted to either inshell or shelled and cannot exceed the threshold.

<https://eatpecans.com>



AMERICAN PECAN PROMOTION BOARD

RECIPES

HEALTH & NUTRITION

ABOUT APPB

NEWS & MEDIA

The Secret Ingredient You've Been Looking For

The purpose of the APPB is to strengthen the position of pecans in the marketplace, maintain and expand markets for pecans, and develop new uses for pecans.



American Pecan Promotion Board (APPB)

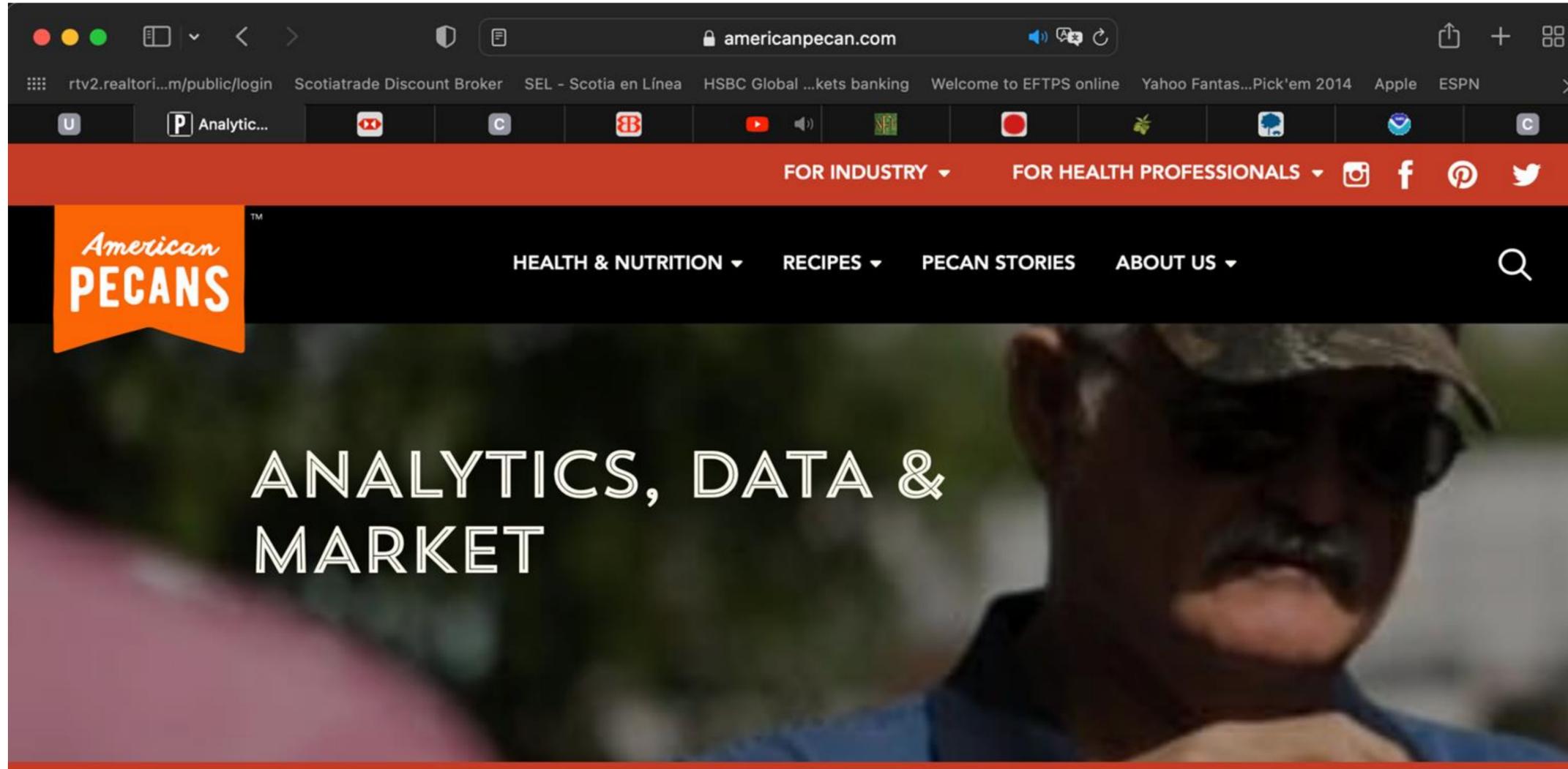
- . El Consejo está formado por 10 productores y 7 importadores. (2 importadores Mexicanos son consejeros por gestión de COMENUEZ)
- . Su objetivo es obtener los recursos necesarios para financiar la promoción de la Nuez Pecanera como Genérico, en USA y en otros Países.
- . Cobran a todas las nueces que participan en el Mercado de USA una cuota de promoción de \$.02 cvs/libra a nuez con cáscara y \$.04 cvs/libra a nuez procesada. Esto incluye a todas las nueces que son importadas a USA sin importar el país de origen y su cuota es obligatoria para ser entregada al APPB por el importador.
- . Los procesadores en México que exportan a USA han incorporado, en su proporción, esta cuota a su costo de operación global.
- . Las operaciones de nueces de origen de USA son auditadas por el USDA.
- . Las operaciones de nueces importadas a USA son vigiladas por Aduanas de USA para asegurar que se cumpla con la Ley y se entreguen los fondos por el importador al APPB.
- . Si México exporta 180,000,000 libras el ciclo 2021-22 en “inshell” estaría generando \$3.6 MDD USA para el APPB. (Aproximados \$72 MDP)

¡Buenas Noticias para la Industria de la Nuez!

En la última junta de consejo de **APPB** se autorizó dentro del presupuesto de operación, una cantidad de **\$ 500,000 US DIs** para hacer una campaña de promoción en México de la Nuez como Genérico.

Esta es una señal de que se reconoce que México es un mercado con un importante potencial de incremento en el consumo si se hace la promoción adecuada.

<https://americanpecan.com/for-industry/analytics-data-market>



PECAN INDUSTRY POSITION REPORTS

- + July 2022
- + June 2022
- + May 2022
- + April 2022

¿Cómo interpretamos los reportes del APC?

El ciclo productivo se registra de **SEP 2020-AGO 2021** **SEP 2021-AGO 2022**.

Los reportes se publican cada mes e incluyen solo operaciones formales en USA.

Los procesadores y los acumuladores deben reportar al USDA y al APC sus operaciones realizadas mes con mes y pueden ser sujetos a auditoría y sanciones si se detectan omisiones.

En los reportes puede haber algunas actualizaciones que se modifican al subir al sistema datos recibidos de meses atrasados.

Las cantidades están expresadas en Libras y Dólares.

La tasa de conversión de “Inshell a Shelled” es al 50%

Se reportan Inventarios, Contratos, Compras dentro de USA, Importaciones, Embarques y Exportaciones por País destino.

AMERICAN PECAN COUNCIL

Handler Shipments and Inventory

July 31, 2022

U.S. PECANS RECEIVED

	<u>7/31/2022</u>	<u>7/31/2021</u>	<u>% of Change of Year</u>	<u>9/1/2021-7/31/2022</u>	<u>9/1/2020-7/31/2021</u>	<u>% of Change of</u>
Pecans Received:						
Improved	3,681,890	3,068,892	20%	241,862,039	275,677,584	-12%
Native/Seedling	147	171,998	-100%	26,066,059	21,220,263	23%
Substandard	-	122,810	-100%	15,587,909	31,275,009	-50%
Total	<u>3,682,037</u>	<u>3,363,700</u>	<u>9%</u>	<u>283,516,007</u>	<u>328,172,856</u>	<u>-14%</u>

	<u>7/31/2022</u>	<u>7/31/2021</u>	<u>% of Change of Year</u>	<u>9/1/2021-7/31/2022</u>	<u>9/1/2020-7/31/2021</u>	<u>% of Change of</u>
Shipments:						
Shelled Meats						
Retail/Grocery/Export	11,184,457	14,115,416	-21%	149,180,333	156,011,802	-4%
Inshell						
Retail/Grocery/Export	<u>405,569</u>	<u>1,259,342</u>	<u>-68%</u>	<u>40,879,004</u>	<u>105,061,794</u>	<u>-61%</u>

**Volumen recibido por la industria en USA
en millones de libras SEPT = JULIO**

<u>9/1/2021-7/31/2022</u>	<u>9/1/2020-7/31/2021</u>	<u>% of Change of</u>
241,862,039	275,677,584	-12%
26,066,059	21,220,263	23%
15,587,909	31,275,009	-50%
<u>283,516,007</u>	<u>328,172,856</u>	<u>-14%</u>

<u>9/1/2021-7/31/2022</u>	<u>9/1/2020-7/31/2021</u>	<u>% of Change of</u>
---------------------------	---------------------------	-----------------------

	<u>7/31/2022</u>	<u>7/31/2021</u>	<u>% of Change of Year</u>
Total Pecans in Inventory:			
Shelled Meats	44,278,736	47,765,230	-7%
Inshell	103,149,554	140,713,624	-27%
Total (Inshell Basis)	<u>191,707,026</u>	<u>236,244,084</u>	<u>-19%</u>
Commitments to Ship:			
Meats:			
Domestic-Shelled Meats	64,924,105	71,227,927	-9%
Export-Shelled Meats	10,795,774	13,258,798	-19%
Total Meats	<u>75,719,879</u>	<u>84,486,725</u>	<u>-10%</u>
Inshell:			
Domestic-Inshell	6,793,372	3,540,525	92%
Export-Inshell	-0-	1,969,111	-100%
Total Inshell	<u>6,793,372</u>	<u>5,509,636</u>	<u>23%</u>
Less: Contracts to Purchase:			
Shelled Meats	303,720	-0-	0%
Inshell	650,000	2,312,809	0%
Total Commitments (Inshell Basis)	<u>156,975,690</u>	<u>172,170,277</u>	<u>-9%</u>
Net Open Position	<u>34,731,336</u>	<u>64,073,807</u>	<u>-46%</u>

PECANS PURCHASED OUTSIDE THE U.S. BY U.S. HANDLERS

	<u>7/31/2022</u>	<u>7/31/2021</u>	<u>9/1/2021-7/31/22</u>	<u>9/1/2020-7/31/21</u>	<u>% of Change of Year</u>
Shelled Meats:					
Country of Origin:					
Australia	26,326	-0-	236,641	339,667	0%
Mexico	180,840	426,515	6,536,069	42,404,611	-85%
Total Shelled Meats	<u>207,166</u>	<u>426,515</u>	<u>6,772,710</u>	<u>42,744,278</u>	<u>-85%</u>
Inshell:					
Country of Origin:					
Argentina	-0-	-0-	-0-	44,100	-100%
Mexico	-	-0-	17,079,179	29,358,824	-42%
Total Inshell	<u>-</u>	<u>-</u>	<u>17,079,179</u>	<u>29,402,924</u>	<u>-42%</u>
Total (Inshell Basis)					
Argentina	-0-	-0-	-0-	44,100	-100%
Australia	52,652	-0-	473,282	679,334	0%
Mexico	361,680	853,030	30,151,317	114,168,046	-74%
Total (Inshell Basis)	<u>414,332</u>	<u>853,030</u>	<u>30,624,599</u>	<u>114,891,480</u>	<u>-73%</u>

La gran caída del registro de compras a México se explica por el inicio de cobro de cuota de \$.02 cvs/lb a todas las importaciones de nuez que entran a USA.

Pecan Industry Position Report

Twelve Months Ended August 31, 2021

		YEAR-END INVENTORY			
		Committed		Uncommitted	Total
	Average Price Per Pound	Export	Domestic		
Inshell:					
Improved	\$ 1.56	1,843,808	4,226,018	103,046,200	109,116,026
Native/Seedling	\$ 0.81	-0-	63,958	8,593,818	8,657,776
Substandard	\$ 0.64	-0-	-0-	702,582	702,582
Total		1,843,808	4,289,976	112,342,600	118,476,384
Shelled:					
	<u>Shell-Out Yield</u>				
Halves		7,554,112	27,124,195	(13,605,779)	21,072,528
Pieces		1,005,306	27,367,134	(4,438,319)	23,934,121
Work In Process		-0-	-0-	898,156	898,156
Total	45%	8,559,418	54,491,329	(17,145,942)	45,904,805
Total Inventory (Inshell Basis)		18,962,644	113,272,634	78,050,716	210,285,994

U.S. PECAN HANDLED THROUGHOUT THE YEAR

Improved	281,063,117
Native/Seedling	20,633,470
Substandard	30,469,703
Total	332,166,290

AMERICAN PECAN COUNCIL

Shipments and Inventory on Hand

August 31, 2021

U.S. PECANS RECEIVED

	<u>8/31/2021</u>	<u>8/31/2020</u>	<u>% of Change of Year</u>	<u>9/1/2020-8/31/2021</u>	<u>9/1/2019-8/31/2020</u>	<u>% of Change of</u>
Pecans Received:						
Improved	14,281,632	3,660,911	290%	281,063,117	190,584,833	47%
Native/Seedling	59	437,578	-100%	20,633,470	30,751,674	-33%
Substandard	218,951	417,153	-48%	30,469,703	23,668,394	29%
Total	<u>14,500,642</u>	<u>4,515,642</u>	<u>221%</u>	<u>332,166,290</u>	<u>245,004,901</u>	<u>36%</u>
Shipments:						
Shelled Meats						
Retail/Grocery/Export	14,807,021	12,054,803	23%	180,568,712	152,091,483	19%
Inter-handler Transfers Shipped	988,250	29,590	3240%	2,601,255	809,449	221%
Inter-handler Transfers Received	(1,992,994)	(387,200)	415%	(19,092,251)	(9,550,678)	-100%
Total Shelled Meats	<u>13,802,277</u>	<u>11,697,193</u>	<u>18%</u>	<u>164,077,716</u>	<u>143,350,253</u>	<u>14%</u>
Inshell						
Retail/Grocery/Export	376,430	1,969,930	-81%	104,607,839	70,874,313	48%
Inter-handler Transfers Shipped	3,650,837	2,390,065	53%	146,374,396	53,867,523	172%
Inter-handler Transfers Received	(5,836,959)	(269,873)	-2063%	(146,322,670)	(178,217,107)	18%
Total Inshell Meats	<u>(1,809,692)</u>	<u>4,090,122</u>	<u>-144%</u>	<u>104,659,565</u>	<u>(53,475,271)</u>	<u>296%</u>
Total Shipments (Inshell Basis)	<u>25,794,862</u>	<u>27,484,507</u>	<u>-6%</u>	<u>432,814,997</u>	<u>233,225,236</u>	<u>86%</u>

	8/31/2021	8/31/2020	% of Change of Year
Total Pecans in Inventory:			
Shelled Meats	45,736,533	60,679,865	-25%
Inshell	118,276,940	94,947,317	25%
Total (Inshell Basis)	<u>209,750,006</u>	<u>216,307,047</u>	<u>-3%</u>
Commitments to Ship:			
Meats:			
Domestic-Shelled Meats	67,137,731	62,192,154	8%
Export-Shelled Meats	11,753,653	11,945,364	-2%
Total Meats	<u>78,891,384</u>	<u>74,137,518</u>	<u>6%</u>
Inshell:			
Domestic-Inshell	802,090	723,508	11%
Export-Inshell	1,918,638	6,561,053	-71%
Total Inshell	<u>2,720,728</u>	<u>7,284,561</u>	<u>-63%</u>
Less: Contracts to Purchase:			
Shelled Meats	-0-	(168,300)	100%
Inshell	(90,000)	-0-	0%
Total Commitments (Inshell Basis)	<u>160,413,496</u>	<u>155,222,997</u>	<u>3%</u>
Net Open Position	<u>49,336,510</u>	<u>61,084,050</u>	<u>-19%</u>

Cuidado con las fuentes “Alternas” de información con una gran carga “Editorial” como Pecan Report, que es un Blog particular.

PECAN REPORT

HOME NEWS REPORTS PRICES RESOURCES EVENTS CLASSIFIEDS COMICS CONTACT

50 LG▼2.45 NPCN▼2.35 MD▲2.41 CAD▼2.46 OCN▼2.56 WSCH▼2.45 ELT▼2.25 CF▼2.51 WICH▲2.51 STU▼2.15 PWN▼2.48 DES▼2.51 SEED▼1.65 SUM▼2.45 KIO▼2.51 MM▼1.14
i.89 FMP▼5.68 MEAL▼4.95 FJH▼5.95 FJM▼6.00 FMH▼6.20 FMDH▼5.77 SPCN▼5.91 FMDP▼5.58 FLP▼5.60 FMGP▼5.50 FSMH▼5.70 FXLP▼5.65 FSMP▲5.55 FLH▲5.85 FXLH▼5.89

Whether purchasing from the US or other countries, with minimal inventories, China will hopefully be taking significant quantities of pecans off the market this year. This may not last for US growers as the APC has opted to end marketing in China indefinitely citing lockdowns as one of the reasons.

Month	2019-20	2020-21	2021-22
Sept	180,000,000	130,000,000	150,000,000
Oct	140,000,000	160,000,000	170,000,000
Nov	170,000,000	180,000,000	130,000,000
Dec	210,000,000	230,000,000	180,000,000
Jan	240,000,000	270,000,000	240,000,000
Feb	260,000,000	270,000,000	280,000,000
Mar	240,000,000	270,000,000	290,000,000
Apr	260,000,000	280,000,000	240,000,000
May	250,000,000	250,000,000	210,000,000
Jun	240,000,000	250,000,000	210,000,000
Jul	220,000,000	230,000,000	191,707,026
Aug	210,000,000	200,000,000	210,000,000

While I am not a marketer and must defer to the opinion of the experts with the APC I personally do not agree with the idea to end or even slow marketing in the worlds 2nd largest economy housing the world's largest concentration of middle class citizens with plenty of disposable income and a health focused diet, but I am not in charge. Hopefully we can take a closer look at marketing in China and find a way to make it work, the potential in China as has been undeniably proven in prior years, is too great to ignore.

+4 0

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Previous post: Significant Changes ...

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“Hacer predicciones es muy difícil, especialmente cuando se trata del futuro”

-Niels Bohr-

TPGA 2021 Estimate- US Crop

State	Tristate (June '22)	TPGA (July '22)	Sheller (Sept '21)
Alabama			
Arizona			
Arkansas	3.0	2.5	
California	34.0	32.0	
Florida	2.0	1.0	
Georgia	5.0	4.5	
Kansas	2.0	2.0	
Louisiana	125.0	135.0	
Mississippi	2.0	2.0	
Missouri	5.0	8.0	
New Mex.	3.0	3.0	
Oklahoma	1.5	2.0	
S. Car.	70.0	64.0	
Texas	16.0	13.0	
Other states	0.5	2.0	
U.S. Total	38.0	32.0	1.0
	307.0	304.0	

Colaboradores

Estimación Cosecha 2022

NOMBRE

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MUNICIPIO

OJINAGA
BUENAVENTURA
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JIMENEZ
SAUCILLO
JIMENEZ
ALDAMA
ROSALES, JULIMES Y MEOQUI
ROSALES, JULIMES Y MEOQUI
CAMARGO
DELICIAS
JIMENEZ
COYAME
JIMENEZ
CHIHUAHUA Y JIMENEZ
GENERAL CEPEDA
LA LAGUNA
DE ZARAGOZA COAHUILA
PARRAS
SALTILLO, RAMOS ARIZPE, LAMADRID, GENERAL CEPEDA Y ARTEAGA
HERMOSILLO Y OBREGON

ESTADO	PRODUCCIÓN ANUAL 2015 SADER	PRODUCCIÓN ANUAL 2016 SADER	ESTIMACIÓN PRODUCCIÓN ANUAL 2017 COMENUEZ	ESTIMACIÓN PRODUCCIÓN ANUAL 2018 COMENUEZ	ESTIMACIÓN PRODUCCIÓN ANUAL 2019 COMENUEZ	ESTIMACIÓN PRODUCCIÓN ANUAL 2020 COMENUEZ	ESTIMACIÓN PRODUCCIÓN ANUAL 2021 COMENUEZ	ESTIMACIÓN PRODUCCIÓN ANUAL 2022 COMENUEZ	PORCENTAJE COMPARADO CON 2021
CHIHUAHUA	79,934	92,500	77,500	92,233	84,854	90,794	68,500	91,000	33%
SONORA	15,028	17,500	13,000	15,627	20,000	17,000	15,000	23,000	53%
COAHUILA	12,509	14,600	10,700	18,160	11,804	15,109	16,800	15,300	-9%
DURANGO	7,143	8,140	6,100	7,000	5,600	6,100	7,000	7,900	13%
NUEVO LEÓN	3,353	3,500	2,750	3,500	2,800	3,150	2,650	2,250	-15%
OTROS	4,748	5,900	4,700	5,200	4,680	5,100	5,300	6,000	13%
TOTAL (tons)	122,714	142,140	114,750	141,720	129,738	137,253	115,250	145,450	26%
TOTAL (mill libras)	270,534	313,360	252,976	312,434	286,019	302,585	254,078	320,657	

FUENTE:

SIAP (Servicio de Información Agroalimentaria y Pesquera) / SADER

COMENUEZ

Información liberada Agosto 2022

Histórico Muestra de Precios Promedio Nuez Comercial Ventas OCT-FEB

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Precio 1as DLLS/pto	\$5.11	\$2.98	\$3.52	\$3.67	\$4.70	\$5.16	\$4.86	\$3.46	\$3.53	\$3.06	\$4.05	???	
Precio 2as DLLS/pto	\$4.50	\$2.00	\$3.00	\$3.43	\$4.14	\$4.90	\$4.00	\$2.63	\$2.42	\$2.30	\$3.50		
T.C Dlls-Pesos/DIC	\$13.94	\$12.90	\$13.06	\$14.74	\$17.24	\$20.61	\$19.66	\$19.65	\$19.88	\$18.91	\$20.50		
Pesos/kilo 1as 56%R	\$87.94	\$47.38	\$56.75	\$66.79	\$100.13	\$131.37	\$118.00	\$83.83	\$86.62	\$71.53	\$102.50		
													Inflación acum pesos
Inflación MX %	4.40	3.57	3.97	4.08	2.13	3.36	6.77	4.83	2.83	3.15	7.23	8.50	
Inflación acumulada MXN	104.40	108.13	112.42	117.01	119.50	123.51	131.88	138.25	142.16	146.64	157.24	170.60	70.60%
Inflacion US %	3.16	2.07	1.46	1.62	0.12	1.26	2.13	2.44	1.81	1.23	3.00	8.50	
Inflación acumulada USD	103.16	105.30	106.83	108.56	108.69	110.06	112.41	115.15	117.23	118.68	122.24	132.63	32.63%
													Inflación acum Dólares

* Hacer énfasis en el concepto de Precios Promedio Cosecha

** La inflación es la reportada por el Banco de México y no la inflación de costos de producción.

Producción, Importación, Exportación e Inventarios de Nuez Pecanera en USA en base limpia “Shelled”

Table F-14--Pecans: Supply and utilization (shelled basis), 1980/81 to date 1

Season 2	Utilized production	Imports	Beginning stocks	Total supply	Ending stocks	Exports	Utilization	
							Domestic	Per capita
----- 1,000 pounds -----							<i>Pounds</i>	
1999/2000	160.396	28.963	20.543	209.902	76.152	20.335	113.415	0,40
2000/01	92.647	32.990	76.152	201.788	49.003	20.045	132.740	0,47
2001/02	145.580	35.456	49.003	230.039	76.188	24.972	128.879	0,45
2002/03	78.444	41.672	76.188	196.304	28.704	30.523	137.078	0,47
2003/04	116.968	62.719	28.704	208.392	41.177	34.169	133.046	0,46
2004/05	82.552	81.150	41.177	204.879	29.190	30.565	145.124	0,49
2005/06	125.251	75.403	29.190	229.845	59.588	38.181	132.075	0,44
2006/07	91.394	56.998	59.588	207.980	30.573	44.105	133.303	0,44
2007/08	180.255	79.853	30.573	290.681	85.438	71.319	133.924	0,44
2008/09	98.211	61.855	85.438	245.503	42.225	52.652	150.627	0,49
2009/10	131.982	83.178	42.225	257.385	39.960	70.502	146.923	0,48
2010/11	140.407	88.457	39.960	268.824	42.817	61.479	164.528	0,53
2011/12	124.601	74.610	42.817	242.028	53.922	74.113	113.993	0,36
2012/13	140.775	79.347	53.922	274.044	48.106	91.274	134.664	0,43
2013/14	130.768	92.493	48.106	271.367	78.133	81.408	111.826	0,35
2014/15	128.112	103.964	78.133	310.210	54.323	99.944	155.943	0,49
2015/16	104.513	113.712	54.323	272.548	55.633	79.731	137.184	0,43
2016/17	127.935	132.637	55.633	316.205	69.489	103.655	143.062	0,44
2017/18	141.146	137.100	69.489	347.734	80.081	113.472	154.180	0,47
2018/19	103.600	166.009	80.081	349.690	87.953	93.892	167.844	0,51
2019/20	134.701	153.759	87.953	376.413	103.045	96.667	176.701	0,54
2020/21 P	152.679	137.505	103.045	393.230	84.192	116.143	192.895	0,58

P = Preliminary. 1 Conversion factors from in-shell to shelled basis vary year to year for production, stocks, and exports, and were 0.48 in 2010/11, 0.46 in 2011/12, 0.47 for 2012/13, 0.49 in 2013/14, 0.48 in 2014/15, 0.41 in 2015/16, 0.48 in 2016/17, 0.46 in 2017/18, 0.43 in 2018/19, 0.53 in 2019/20, and 0.50 in 2020/21. For imports, the conversion factor was a constant 0.50.

2 Season begins in October as of 1989; prior to 1989 season began in July.

Source: USDA, Economic Research Service calculations.

Producción de todas las nueces en USA en millones de libras base limpia “Shelled”

Table F-3--All tree nuts: Utilized production (shelled basis), United States, 2000 to date

Season 1	Almonds	Hazelnuts	Pecans	Walnuts	Macadamias	Pistachios
				-- 1,000 pounds --		
1999/2000	833.000	31.561	160.396	237.884	25.668	58.083
2000/01	703.000	18.052	92.647	204.857	22.715	114.164
2001/02	830.000	39.600	145.580	257.556	25.441	80.733
2002/03	1.090.000	15.600	78.444	243.963	24.078	149.513
2003/04	1.040.000	30.224	116.968	279.429	24.078	56.217
2004/05	1.005.000	28.548	82.552	282.360	25.668	170.515
2005/06	915.000	20.806	125.251	315.989	24.532	139.003
2006/07	1.120.000	37.116	91.394	296.931	26.349	119.000
2007/08	1.390.000	29.355	180.255	280.427	18.626	206.998
2008/09	1.630.000	26.667	98.211	396.364	22.715	135.392
2009/10	1.410.000	38.145	131.982	387.870	19.081	174.769
2010/11	1.640.000	21.836	140.407	441.521	18.172	250.125
2011/12	2.030.000	31.218	124.601	400.631	22.261	222.000
2012/13	1.890.000	28.400	140.775	442.099	19.989	278.255
2013/14	2.010.000	36.923	130.768	437.651	18.626	234.484
2014/15	1.870.000	26.100	128.112	506.052	20.898	246.332
2015/16	1.900.000	23.312	104.513	526.957	21.352	134.593
2016/17	2.140.000	35.106	127.935	608.431	19.081	446.299
2017/18	2.270.000	25.600	141.146	557.143	22.261	226.915
2018/19	2.280.000	40.800	104.460	601.476	16.037	487.457
2019/20	2.560.000	35.200	134.701	559.240	18.490	370.725
2020/21 P	3.115.000	50.400	152.679	685.381	17.945	524.822

P = Preliminary. 1 Season begins in August for almonds, September for pistachios and walnuts, October for pecans, and July for hazelnuts and macac

Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruits and Nuts Summary*, various issues.

Utilidad Bruta en US Dls por Acre en Producción

Table F-2--All tree nuts: Gross return per bearing acre, United States, 2000 to date 1

Season 2	Almonds	Hazelnuts	Pecans	Walnuts	Macadamias	Pistachios
	----- Dollars 3 -----					
1999/2000	1.418	1.219	--	1.273	2.003	2.304
2000/01	1.307	699	--	1.482	1.667	3.290
2001/02	1.396	1.197	--	1.675	1.856	2.085
2002/03	2.203	668	--	1.571	1.697	4.016
2003/04	2.909	1.394	--	1.775	1.816	1.650
2004/05	3.840	1.901	--	2.111	2.317	5.000
2005/06	4.281	2.185	--	2.592	2.430	5.525
2006/07	3.703	1.647	--	2.611	2.591	4.016
2007/08	3.753	2.639	--	3.446	1.640	5.101
2008/09	3.300	1.832	--	2.426	2.233	4.830
2009/10	3.058	2.768	--	3.114	1.960	4.705
2010/11	3.771	2.327	--	4.032	2.000	8.452
2011/12	5.010	3.148	--	5.045	2.548	5.746
2012/13	5.874	2.240	--	5.577	2.347	7.902
2013/14	7.255	4.020	--	6.519	2.229	8.057
2014/15	7.944	4.320	--	6.576	2.501	8.303
2015/16	6.178	2.553	--	3.373	2.849	3.812
2016/17	5.209	3.211	1.770	4.047	2.545	6.302
2017/18	5.441	1.840	1.752	4.683	3.171	4.058
2018/19	5.140	2.086	1.031	2.619	2.486	9.907
2019/20	5.228	1.690	1.192	3.392	2.890	6.124
2020/21	4.496	2.205	1.054	2.520	2.915	7.725

-- = not available. 1 Reporting of bearing acreage data for pecans began in 2016/17. 2 Season begins in August for almonds, September for pistachios and walnuts, October for pecans, and July for hazelnuts and macadamias. 3 Value of production divided by bearing acreage.

Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruits and Nuts Summary*, various issues.

Precio Promedio Temporada en US Dlls pagados al Productor en producto procesado “Shelled”

Table F-4--All tree nuts: Season-average grower prices received, United States, 2000 to date						
Season 1	Almonds	Hazelnuts	Pecans	Walnuts	Macadamias	Pistachios
----- Cents per pound, shelled basis -----						
1999/2000	86,0	112,8	206,0	105,8	147,5	281,6
2000/01	97,0	111,0	257,7	145,3	129,9	215,0
2001/02	91,0	87,6	138,1	133,1	129,9	201,4
2002/03	111,0	125,0	210,4	137,2	125,5	222,9
2003/04	157,0	129,2	237,4	134,4	134,3	258,2
2004/05	221,0	189,2	396,0	156,7	160,7	272,7
2005/06	281,0	297,1	324,9	193,4	178,3	417,4
2006/07	206,0	125,1	352,9	190,5	147,5	378,0
2007/08	175,0	257,1	240,6	268,7	132,1	283,4
2008/09	145,0	194,4	276,6	141,1	147,5	420,9
2009/10	165,0	208,2	326,1	193,1	154,1	339,2
2010/11	179,0	309,0	480,6	233,3	165,1	463,3
2011/12	199,0	287,3	526,4	334,4	171,7	396,0
2012/13	258,0	228,8	338,1	341,3	176,1	516,8
2013/14	321,0	326,6	352,1	417,9	191,5	697,5
2014/15	400,0	496,6	403,2	377,5	191,5	744,9
2015/16	313,0	372,3	536,0	192,4	213,5	660,0
2016/17	239,0	338,4	544,7	209,8	220,1	337,5
2017/18	253,0	287,5	502,5	282,0	242,1	447,1
2018/19	250,0	225,0	406,9	152,4	261,9	536,6
2019/20	245,0	240,0	349,1	221,4	264,1	524,0
2020/21	183,0	262,5	286,0	139,7	272,9	547,6

1 Season begins in August for almonds, September for pistachios and walnuts, October for pecans, and July for hazelnuts and macadamias.

Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruits and Nuts Summary*, various issues.

Production expense: Pecans more expensive to grow than other tree nuts

Regardless of region, pecans generally cost more to grow vs. other tree nuts given lower yield per acre



Pecans



Almonds



Walnuts



Pistachios

	Representative East	Representative West	Representative Almond cost	Representative Walnut cost	Representative Pistachio cost
Growing cost (\$/acre)	~2,000	~2,500	~3,300 to 4,900	~3,200 to 3,750	~3,750 to 3,900
In-shell yield (lbs/acre)	~1,000	~2,000	-	~5,000 to 6,000	~2,600 to 2,800
% meat	~45%	~55%	-	43.5% ¹	50%
Meat yield (lbs/acre)	~450	~1,100	~2,200 to 3,000	~2,200 to 2,600	~1,300 to 1,400
Meat growing cost (\$/lb)	~\$4.40	~\$2.30	~\$1.50 to \$1.70	~\$1.40 to 1.45	~\$2.80 to 2.90

~\$3.10-\$3.60
Weighted Average

Cost per pound highly variable—both across and within regions—given differences in scale, yield, weather, alternate bearing seasons, etc.

1. Based on USDA ERS "Fruit and Nut Tree Yearbook" average walnut kernel yield

Note: Growing cost per acre excludes amortization of land and tree/establishment investments. Almond figures reported in meat yield basis only.

Source: Almond Board; UC Davis; USDA; market interviews

Factores a tomar en cuenta para el establecimiento de Precio

- Menor o mayor oferta de nueces.
- (+/-) Más cosecha en Georgia de lo esperado y menos cosecha en Texas.
- (+) Reducción de tamaño de las nueces en Chihuahua, Coahuila y Durango por la escasez de agua y exceso de Temperatura.
- (+) Nogaleras afectadas por la subida de los ríos y el desfogue de las presas.
- (-) Disrupción de cadenas de suministro. Almendras y Walnuts no pueden embarcar desde California a sus mercados destino por tema de contenedores.
- (-) Complicaciones para entregar Nueces en Europa y Asia a tiempo.

Factores a tomar en cuenta para el establecimiento de Precio

- (-) Mayor costo del financiamiento con subida de tasas de interés.
- (-) Inflación Alimentaria Global por lo que el consumidor tiene menor ingreso disponible.
- (-) El mercado no es sensible a nuestros costos de producción.
- (-) Necesidades de Productores de recursos para operar.
- (+) Aumento de demanda Global gracias a estrategias de promoción.
- (+) Inventarios en Industria de USA en niveles bajos.
- (+) Mejor nivel de precios en los Pedazos de Nuez.

“Percepción es Realidad”



La mejor manera de incrementar las posibilidades de obtener mejores precios por nuestras nueces es mediante una estrategia adecuada de “Marketing” genérico y una forma más integrada de comercializar las nueces en coordinación directa con los procesadores.



LISTA DE NO ACCIÓN

- . NO TOMAMOS NINGUNA AFILIACIÓN NI PREFERENCIA PARTIDISTA
- . NO COMERCIALIZAMOS NUEZ, NI CUALQUIER OTRO PRODUCTO
- . NO FIJAMOS NI TRATAMOS DE FIJAR PRECIOS DE MERCADO
- . NO RECOMENDAMOS ESTRATEGIAS DE COMERCIALIZACIÓN



Para hacer llegar sugerencias o comentarios favor de enviar al correo

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Septiembre 2022