



**YOUR INVESTMENT.
OUR WORK.
A STRONGER INDUSTRY.**

AMERICAN PECAN COUNCIL

AMERICAN PECAN PROMOTION BOARD

AUGUST 19, 2026



UNIFYING THE PECAN INDUSTRY'S U.S. AND GLOBAL MARKETING



AMERICAN PECAN COUNCIL

Marketing Order focused on
international marketing and
supporting the **U.S. industry**



AMERICAN PECAN PROMOTION BOARD

Research & Promotion Order
focused on **domestic marketing**
& **research**

Unified Pecan Promotion Plan (UPPP)

Strategies to support **higher-value pecans**
and **industry profitability**:

**Higher Value
Through Nutrition**

**Expanded Demand
Through New
Occasions**

**Incremental
Volume Through
Exports**

**Industry
Readiness
Through Services**



YOUR MARKETING IMPACT



US RETAIL SALES & PURCHASE INTENT UP!

Retail Category Growth*

Pecans only: FY26YTD (October 1, 2025 – May 31, 2026)

Measure	Sales Dollars	Sales % Change	Volume lbs	Volume % change
Total Category	\$664,269,088	6.7%	62,641,781	0.7%
Snacking	\$59,287,323	3.7%	4,322,567	3.3%
Cooking & Baking	\$604,981,765	7.0%	58,319,214	0.5%

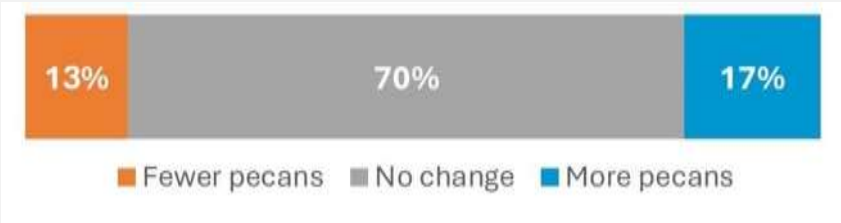
All Nuts: FY26YTD (October 1, 2025 – May 31 2026)

Measure	Sales Dollars	Sales % Change	Volume lbs	Volume % change
Total Category	\$3,965,663,536	0.2%	578,323,588	-5.3%
Snacking	\$2,724,141,186	-3.8%	432,143,211	-6.9%
Cooking & Baking	\$1,241,522,350	10.4%	146,180,377	-0.3%

*Domestic Data from Circana, % changes based on YOY (Oct 1, 2024 – May 31, 2025 vs Oct 1, 2025 – May 31, 2026).

Intent to Consume Pecans

+4%



Source: Survey of 4,354 U.S. Gen Pop Consumers

NEW RESEARCH SHOWS PECANS LOWER CHOLESTEROL

Parade

Swapping Your Daily Snack for This
Can Lower 'Bad' Cholesterol and
Boost Heart Health By 17%

Newsweek

Replace Snacks With
These Nuts, Say
Scientists

 SUBSCRIBE 

Scientists Just Discovered a Heart-Healthy Benefit of Pecans

Your heart will thank you—and your taste buds will, too.

 SUBSCRIBE  

This Nut May Help Lower Cholesterol and Boost Heart Health, According to a New Study

Adding pecans to our grocery list ASAP.

Resulting in hundreds of news articles around the world

CREATIVE AND RETAIL THAT WORKS!





**SURPRISINGLY
SNACKABLE
PECANS**

FY26 RETAIL RESULTS TO DATE



12,000+
Store Activations
Since 2024



50%
Average Sales
Lift



3.7%
Snacking Category
Growth



6.7%
Category
Sales Growth*

All pecan sales in retail grew so far by 6.7% in FY26 compared to FY25

(FY25 grew 4.7% compared to partial FY26)

FY26 E-COMMERCE RESULTS TO DATE



33%+

New
Buyer
Volume



\$7

Return on Ad
Spend (ROAS)

FOOD SERVICE: PECANS ON THE MENU

Official
Partner:

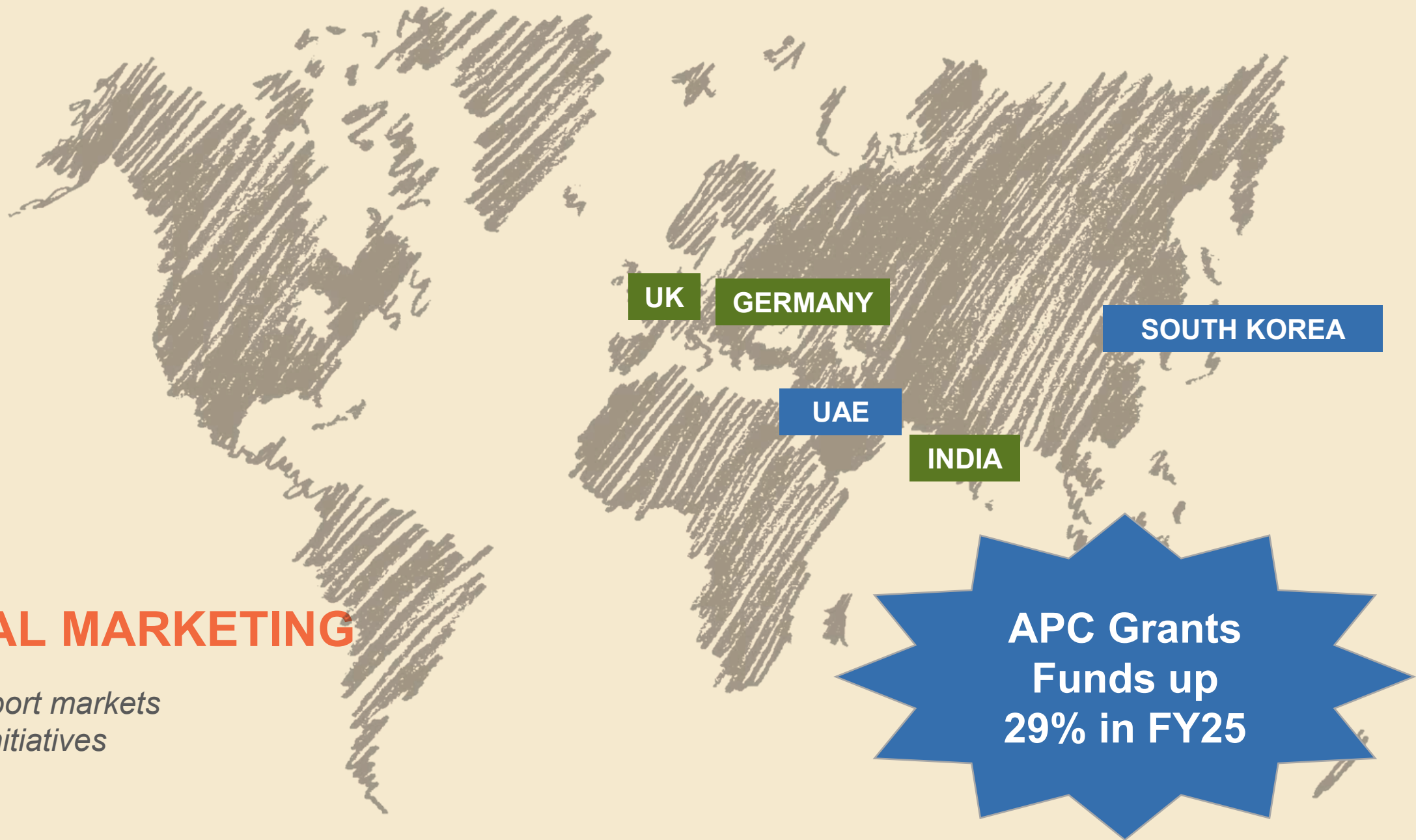


6 new menu items



GLOBAL MARKETING

*Current export markets
with APC initiatives*



SUPPORTING INDUSTRY COMPETITIVENESS



ARMING GROWERS WITH MARKET DATA



- Issued Monthly
- Accompanied with Overview Video

PECAN MARKET ANALYSIS

While still behind schedule, U.S. government data is starting to be published regularly again. Most notably, since our last publication in November, U.S. Census published trade data for both August and September. We are still waiting on Cold Storage data for September and October (which will be published just in time for Christmas on December 23), and October imports and exports (where a publication date has yet to be set). Optimistically, the data should be back on schedule by January's U.S. Pecan Market Analysis.

Turning to the data that is available, the APC handler survey showed October receipts remain right in line with the 5-year average through the first two months of the marketing year, slightly ahead of last year but trailing the record year of 2023/24 by a significant margin. Similarly, aggregate inventories in October (combined shelled & in-shell) are just 2.6% above last year but lag the prior five-year average by 6%. Positively, handler reported domestic sales of shelled pecans are off to a strong start heading into the holidays, even as they failed to eclipse last year's single-month record by 8% (-1.5 mil lbs). On the trade side, both imports and exports fell modestly in August and September, resulting in little change in the overall trade balance. Given all this fairly neutral information, the data would suggest that there was little change in market fundamentals in October.

RECEIPTS

In comparison to August and September – when receipts jumped 12% and 85%, respectively – October's 3% gain was noticeably modest. Additionally, that gain was entirely due to a surge in "sub-standard" pecans (improved fell 2%), suggesting the quality of the harvest in GA may be poorer than anticipated.

INVENTORY

APC handler survey in Oct. showed shelled pecans inventories were down down by 7.2 mil lbs and in-shell inventories fell by 3.9 mil lbs compared to Sep. Shelled inventories are still elevated compared to prior years, but so too are commitments. As such, the higher shelled inventory likely reflects retailers taking possession of the product later rather than sluggish buying.

DOMESTIC DEMAND

The drawdown in inventories in October was largely a reflection of solid domestic demand – reported both by handlers and reflected in our team's aggregate utilization measure. If not for last year, handler reported domestic sales at >34 mil lbs would have been the strongest October on record.

GLOBAL MARKETS

Both imports and exports continue to trail prior-year levels. In the last quarter, U.S. imports of pecans have fallen by 4%, while U.S. exports have slid by 36% (after adjusting both for U.S. MX Shelling Trade¹). Most of the decline on the export side can be traced to weaker shelled volumes to the EU, but notably the bloc has started sourcing in-shell pecans instead (see graph of the month).

¹The net trade of U.S. in-shell pecans to Mexico and Mexico shelled pecans to the U.S.

GRAPH OF THE MONTH

MARKET INSIGHTS

With a U.S. pecan supplies tight, the U.S. Mexico shelling trade¹ fell to its second lowest level ever in the 2024/25 marketing year, a weakness that continued into September according to Census.

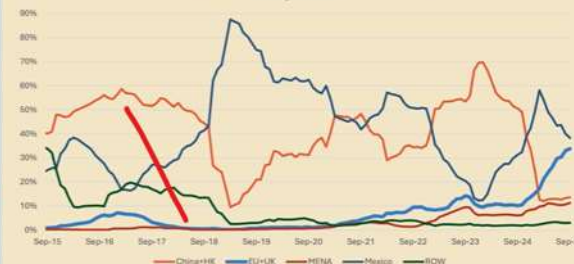
However, in its place, the U.S. has increasingly been sending in-shell pecans to Europe. In fact, as shown in the chart on the right, Europe is on the cusp of surpassing Mexico as the U.S.' largest destination for in-shell over the course of full 12 months – a feat that had only previously been accomplished by China.

Volumes are still small compared to the peak of buying by China. Even so, in the last seven months, the U.S. sent 3 million lbs more in-shell pecans to Europe than Mexico, negating much of their reduction in shelled purchases (noted on the prior page). Additionally, European buyers are paying between \$2.50/lb and \$3.50/lb more than Mexico, which explains the sudden shift in the overall U.S. export price.

Looking ahead, we will be watching whether Europe's emerging appetite for U.S. in-shell pecans continues to outpace Mexico during the peak production months in the Southwest, but this shift player could start to influence U.S. prices for in-shell pecans to a greater degree moving forward.

EU+UK Emerging as Destination for In-Shell

U.S. In-Shell Export Share by Destination
(Rolling 12 Months)



NEW GROWERS TOOL KIT

Growers Toolkit

Expert-backed resources for improving yield, maintaining quality, and staying ahead of industry best practices tailored to your region, operation, and growth stage.



Find what you need

Browse resources by topic from



Built for every stage

Whether you're a first year



Backed by research tailored to your

Filter by keyword



Regions

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- ☐ West
- ☐ Both

Topics

- ☐ Regional Disease & Pest Management
- ☐ Nutrient Recommendations
- ☐ Varietal & Pollinators
- ☐ Fertility
- ☐ Cultural Management

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NEW NUTRITION FACT SHEETS AND LABELS

THE ULTIMATE NUT NUTRITION GUIDE

This is your go-to guide for all things nut nutrition—and why pecans deserve a top spot. Pecans pack a powerful nutrient punch, serving as a good source of fiber, thiamin, and zinc, and manganese. Add to that their antioxidant profile and you've got a smart, well-rounded crunch. Plus, they're proudly from American grown. When it comes to smart snacking, pecans are the ultimate choice.

	PECANS	ALMONDS	PISTACHIOS	MACADAMIA	PEANUTS	CASHEWS
ANTHELMINTIC	17,940					
MANGANESE (mg)	1.3 (100% DV)	0.4	0.3	1.0	0.5	0.5
COPPER (mg)	0.3 (30% DV)	0.3	0.4	0.5	0.2	0.2
ZINC (mg)	1.3 (10% DV)	0.9	0.6	0.8	1.3	0.8
THIAMIN (mg)	0.2 (10% DV)	0.06	0.2	0.1	0.2	0.2
CALORIES	260	164	159	195	160	160
PROTEIN (g)	8	6	6	4	7	7
TOTAL FAT (g)	20	14	13	18	14	14
CARBOHYDRATES (g)	4	6	8	4	3	3
FIBER (g)	3	4	3	2	2	2

Legend:
+ = good source (at least 10% DV)
++ = excellent source (at least 20% DV)
* = antioxidant capacity based on ORAC value
† = antioxidant capacity based on phenolic compounds
‡ = antioxidant capacity based on flavonoid compounds

Source: American Pecan Promotion Board, 1102 Greenway Dr., Suite 100, Irving, TX 75039

THE POWER OF PECANS for Everyday Eating

Each year, over half of Americans experiment with a specific diet or eating pattern.* Whether enjoyed raw or roasted, chopped as pieces or ground like flour, pecans are a versatile nut that can complement healthy diets. Pecans have multiple health-promoting nutrients and bioactive compounds.

PECANS POWER VEGETARIAN & VEGAN DIETS

Tip: Enhancing a whole grain and vegetable dish with pecans not only adds nutty flavor and a satisfying crunch, but it makes the meal more satisfying.

Pecan Wild Rice Pilaf

PECANS MEET THE MEDITERRANEAN-STYLE DIET REQUIREMENTS

Tip: The 2020-2025 Dietary Guidelines for Americans recommends 5 servings of nuts, seeds or soy products per week for a Mediterranean Style diet.

Za'atar Spiced Pecans and Quinoa Veggie Bowl

PECANS FIT A GLUTEN-FREE DIET

Tip: Be careful of nuts that are coated as these can contain flour or other gluten containing ingredients. Ground up pecans can act as gluten-free breadcrumbs for meats, poultry, seafood and casseroles.

Gluten Free Mac and Cheese with Pecan Breadcrumbs

PECANS PROVIDE 3 grams of plant-based protein per serving.

PECANS PROVIDE 18 grams of unsaturated fat per serving, including oleic acid – the primary fat found in olive oil, and only 2g saturated fat.

PECANS ARE NATURALLY GLUTEN FREE and one serving has just 4 grams of carbohydrate.

Preserving Pecans Freshness

Maximizing Shelf-Life, Flavor, & Consumer Acceptability

American PECANS

A good source of fiber, pecans make a smart, satisfying snack.

Nutrition Facts

Serving Size 1 oz (28g / about 1/4 cup)

Amount per serving	Calories	% Daily Value
200		
Total Fat 20g		28%
Saturated Fat 2g		10%
Trans Fat 0g		
Polyunsaturated Fat 6g		
Monounsaturated Fat 12g		
Cholesterol 0mg		
Sodium 0mg		
Total Carbohydrate 4g		1%
Dietary Fiber 3g		11%
Total Sugars 1g		
Includes 0g Added Sugars		0%
Protein 3g		
Vit. D 0mcg 0%	Calcium 20mg 2%	
Iron 1mg 6%	Potassium 120mg 2%	

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

Ingredients: Pecans
Caution: May Contain Pecan Shell Pieces

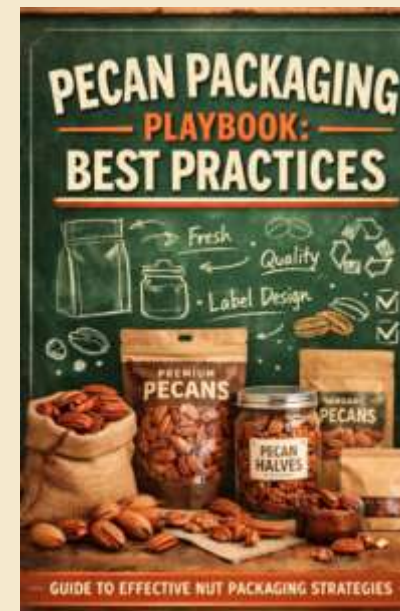
Optional Company Logo

Grown & Packaged By:
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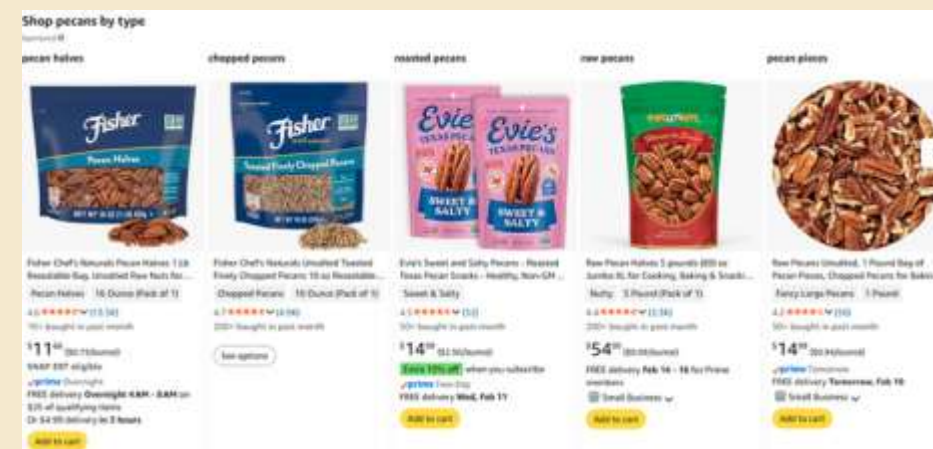
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MORE OFFERINGS!

- Continuation of Digital Consulting Offering
- New Product Packaging Best Practices and Playbook
- Product Photoshoot for Digital Listings:
 - Send in your product/s to be photographed for ecommerce and online initiatives
 - Inquire at Industry@americanpecan.com



Examples
Only



COMING SOON: FOOD SAFETY RESOURCES



e-Learning ▾ Instructor-Led ▾ Webinars ▾

TRAINING REIMAGINED

Food Safety Culture & Ethics Training



APC will offer free training
videos and printed materials

GOOD AGRICULTURAL PRACTICES (GAPs) FIELD GUIDE

FOR GROWERS & SHELLERS

WHAT ARE GAPs?

GAPs are science-based, voluntary guidelines that reduce the risk of contamination in agricultural products. As APC, we want to provide educational resources to support growers & ensure premium quality American pecans meet consumer demands.

WHY ARE GAPs IMPORTANT?

GAPs are essential in the pecan industry to:

- Enhance food safety
- Meet export & regulatory requirements
- Maintain a consistent, high quality supply chain

KEY GAP COMPONENTS & HOW TO IMPLEMENT		
	1 WATER QUALITY	• Test irrigation water regularly • Protect water sources from livestock or runoff • Manage irrigation systems • Avoid using contaminated water close to harvest
	2 MANURE & MUNICIPAL BIOSOLIDS	• Apply only properly composted materials • Follow required application intervals before harvest • Prevent direct contact between manure & nuts
	3 WORKER HEALTH & HYGIENE	• Provide accessible handwashing stations • Train workers on hygiene & safe handling practices • Enforce policies for illness reporting & exclusion during harvest
	4 FIELD SANITATION – SOIL & ORCHARD FLOOR	• Keep orchard floors free of debris & contamination • Manage vegetation effectively • Remove grazing livestock well before harvest • Minimize water to reduce contamination risks
	5 INTEGRATED PEST MANAGEMENT (IPM)	• Monitor pests, diseases, weeds, & orchard health regularly • Use scouting & thresholds to guide applications • Rotate chemistries & management practices • Apply crop protection products correctly & at proper timing • Promote orchard sanitation & overall tree health
	6 CLEANING & SHELLING FACILITIES	• Clean & sanitize equipment routinely • Implement pest control programs in facilities • Separate raw & processed product areas to prevent cross-contamination
	7 HARVEST & POST HARVEST HANDLING	• Use clean, well-maintained equipment • Minimize time nuts remain on the ground • Ensure clean transport & handling • Dry & store under conditions that prevent mold
	8 TRACEABILITY & RECORDKEEPING	• Maintain detailed records (fertilizer, pesticide logs) • Ensure products are traceable through supply chain • Document harvest dates & lot identification

THE BOTTOM LINE

Consistent application of GAPs protects food safety, improves product quality, & strengthens market access for pecan growers & shellers.

Please contact APC for more educational resources on GAPs. industry@americanpecan.com

The logo for American Pecans, featuring the text "American PECANS" in a stylized font with "THE ORIGINAL PRODUCT" underneath.

GET A HOLD OF US ANYTIME!!

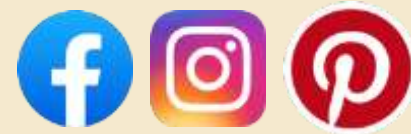


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