

Second Week of Sep 2025 Iranian Pistachio Market UPDATE

The global pistachio industry is characterized by its dynamic nature and inherent complexities, driven by unique annual crop conditions. Sustained success in this sector demands adaptability, informed by robust data and strategic intelligence, as static approaches are rendered ineffective by the variability of each season.

The 2025-2026 crop year has commenced with distinct market dynamics compared to the previous season. In Iran, the market has experienced a **notable surge in demand for green pistachio kernels**, likely attributable to supply constraints in Turkey and Syria. Turkey continues to play a pivotal role as both a significant consumer and a key re-export hub. As a result, a **kernel price increase is expected**.

In contrast, the Indian market has exhibited subdued activity this year. Despite the new crop's misalignment with the Diwali festival, **demand remains unexpectedly low**, potentially due to elevated Iranian pistachio prices, stricter Indian customs regulations, and broader economic challenges impacting consumer demand.

The Chinese New Year, occurring approximately 20 days later than the previous year, is anticipated to delay pistachio orders from China. However, a high crop volume is expected to exert downward pressure on in-shell pistachio prices. **The forthcoming price announcement by Wonderful in early October** is poised to catalyze increased market activity and stimulate demand for in-shell pistachios.

We invite you to reach out for any further information. Our team is dedicated to assisting you.

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