”Chile, un actor global, y las proyecciones en el Avellano Europeo ”

Nefuen
Trading

Santiago, Miercoles 30 de Septiembre 2026

Jorge V. Mohr F.
Nefuen Trading Chile SpA. - Hazelnut Marketing Company LTDA.
Grupo Hijuelas, Ruta 5 Sur km 928, Osorno

Agenda

- Nuestra Historia en El Avellano
- Produccion Mundial y contexto Internacional
- Contexto Nacional, hectares Plantadas y Proyecciones
- Consumo y foco comercial
- Calidad de Fruta
- Variedades y produccion
- Conclusiones

Nuestra Historia

1969

Inicio de mejoramiento genetico en Avellano Europeo de la OSU

Oregon State University

1987

Primer Laboratorio In vitro

inVitro Lab Chile

2002

Primer Huerto de Avellano

la cumbre agrícola y frutícola ltda.

2005

Primer Vivero de Frutales (Berries)

2007

Vivero de Avellanos

nefuen VIVEROS NEFUEN

2010

Primeras variedades de OSU plantadas en Osorno-Chile

2018

Planta de Proceso y comercializacion de fruta en grano

Nefuen Trading

2019

Vivero de Avellanas en Europa

Nefuen Europe

2021

800 hectareas plantadas en el sur de Chile

2023

Primer Proceso en Europa

Nefuen Europe

2026

Nueva planta de Proceso en Osorno

Nefuen Trading

HIJUELAS, REGION DE VALPARAISO, CHILE

NUESTRAS INSTALACIONES

"Viveros Nefuen" has the exclusive license agreement to propagate OSU (Oregon State University) hazelnut cultivars for South America and Europe"

NUESTROS CAMPOS Y PLANTA DE PROCESO

SHELLING AND DRYING

PROCESS CAPACITY

QUALITY CONTROL

SAG OFFICE

Sedex SMETA

BRC FOOD CERTIFICATED

FULL TRAZABILIDAD

inVitro Lab Chile

nefuen VIVEROS NEFUEN

la cumbre agrícola y frutícola ltda.

Nefuen Trading

FRESCO

Chile is located in the Southern Hemisphere and its production is sold in the off-season. Our hazelnuts are fresh from March until August when the Northen Hemisphere production is already more than 8 moths old. Hazelnuts kernels contain around 60% oil. The freshness of our product provides a flavor that will re-engage the world's hazelnut consumers

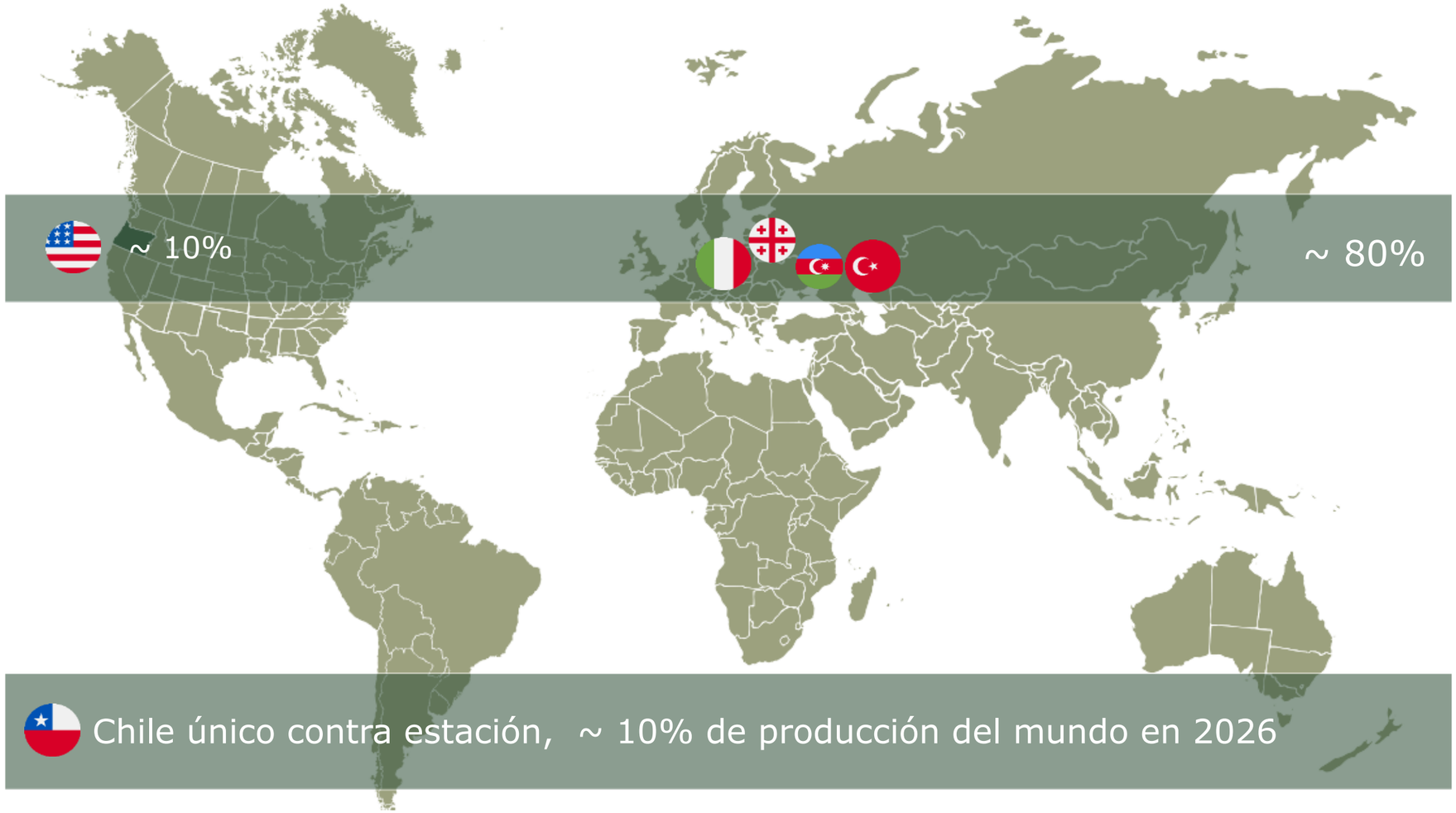
Product available starting in **April.**

SANIDAD AGRICOLA

The isolation created by the Andes Mountains and the Pacific Ocean allows us to produce hazelnuts with fewer chemical applications. Chile is free of brown marmorated stink bugs (BMSB) (H.Halys), eastern filbert blight (EFB) and other diseases. The SAG (Chilean USDA) is really strict in the control at the entrance to Chile.

Also, the suitable climate combined with the low number of insect pests and diseases allow us to have and market unique product. Our hazelnuts come only from cultivars released by Oregon State University.

ZONAS PRODUCTIVAS DE AVELLANO EN EL MUNDO



PRODUCCION MUNDIAL 2025 DE AVELLANAS (International Nut Council, INC)

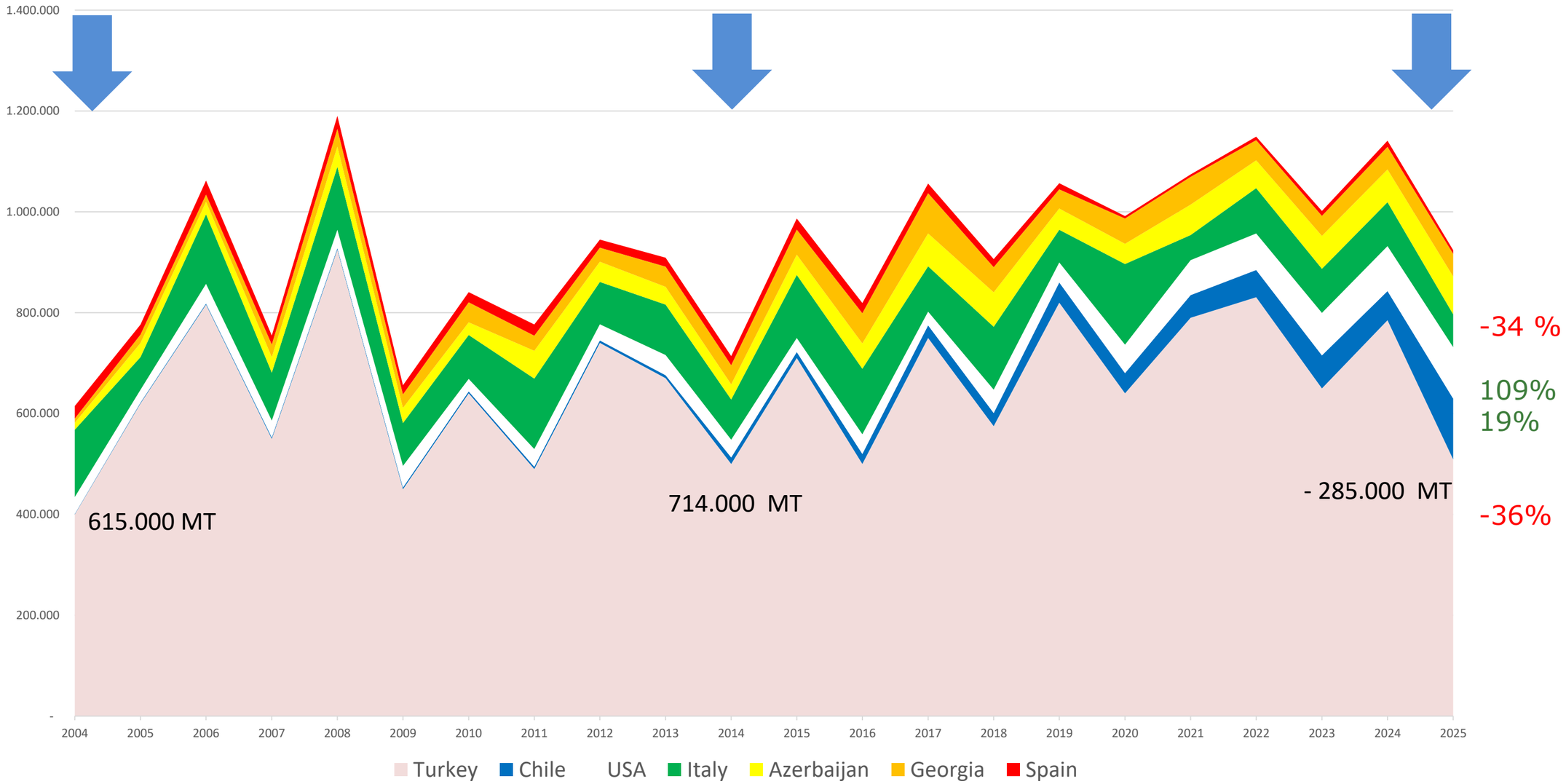
ESTIMATED WORLD HAZELNUT PRODUCTION

In-shell Basis. Metric Tons

		2024/2025				2025/2026			
	COUNTRY	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK
-36 % ↓	TÜRKIYE*	135,000	785,000	920,000	150,000	150,000	518,000	668,000	150,000
109% ↑	CHILE	2,600	58,500	61,100	1,500	1,500	120,700	122,200	2,000
19% ↑	USA	1,000	89,000	90,000	1,000	1,000	110,000	111,000	3,000
	CHINA	2,000	55,000	57,000	1,500	1,500	88,000	89,500	2,000
-34% ↓	ITALY	2,000	87,000	89,000	5,000	5,000	65,000	70,000	1,000
	AZERBAIJAN	4,000	65,000	69,000	0	0	60,000	60,000	3,000
	GEORGIA	1,400	45,000	46,400	500	500	45,000	45,500	500
	IRAN	2,000	18,000	20,000	0	0	24,000	24,000	1,200
↓	FRANCE	2,000	6,500	8,500	0	0	9,000	9,000	0
↓	SPAIN	500	12,000	12,500	600	600	7,500	8,100	400
	OTHERS	0	31,600	31,600	0	0	33,100	33,100	0
	WORLD TOTAL	**152,500**	**1,252,600**	**1,405,100**	**160,100**	**160,100**	**1,080,300**	**1,240,400**	**163,100**

WORLD CONSUMPTION (Supply - End. Stock)	**1,245,000**

PRODUCCION DE AVELLANAS DESDE 2004 (MT, INC, International Nut Council)



https://inc.nutfruit.org/members-area/statistics/

PRODUCCION MUNDIAL DE AVELLANAS 2026 (International Nut Council, INC)

43rd World Nut and Dried Fruit Congress. Macao, May 12-14, 2026

ESTIMATED WORLD HAZELNUT PRODUCTION

In-shell Basis. Metric Tons

	2025/2026				2026/2027			
COUNTRY	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK
TÜRKIYE	150,000	518,000	668,000	150,000	150,000	809,940	959,940	220,000
USA	1,000	110,000	111,000	3,000	3,000	123,500	126,500	3,000
CHILE	1,500	120,700	122,200	2,000	2,000	120,000	122,000	2,000
CHINA	1,500	88,000	89,500	2,000	2,000	100,000	102,000	2,200
ITALY	5,000	65,000	70,000	1,000	1,000	90,000	91,000	1,000
AZERBAIJAN	0	60,000	60,000	1,000	1,000	65,000	66,000	1,500
GEORGIA	500	45,000	45,500	2,000	2,000	45,000	47,000	0
IRAN	0	24,000	24,000	1,200	1,200	22,600	23,800	1,100
SPAIN	0	7,500	7,500	0	0	10,530	10,530	0
FRANCE	0	9,000	9,000	500	500	9,500	10,000	600
OTHERS	0	33,100	33,100	0	0	36,000	36,000	0
WORLD TOTAL	**159,500**	**1,080,300**	**1,239,800**	**162,700**	**162,700**	**1,432,070**	**1,594,770**	**231,400**

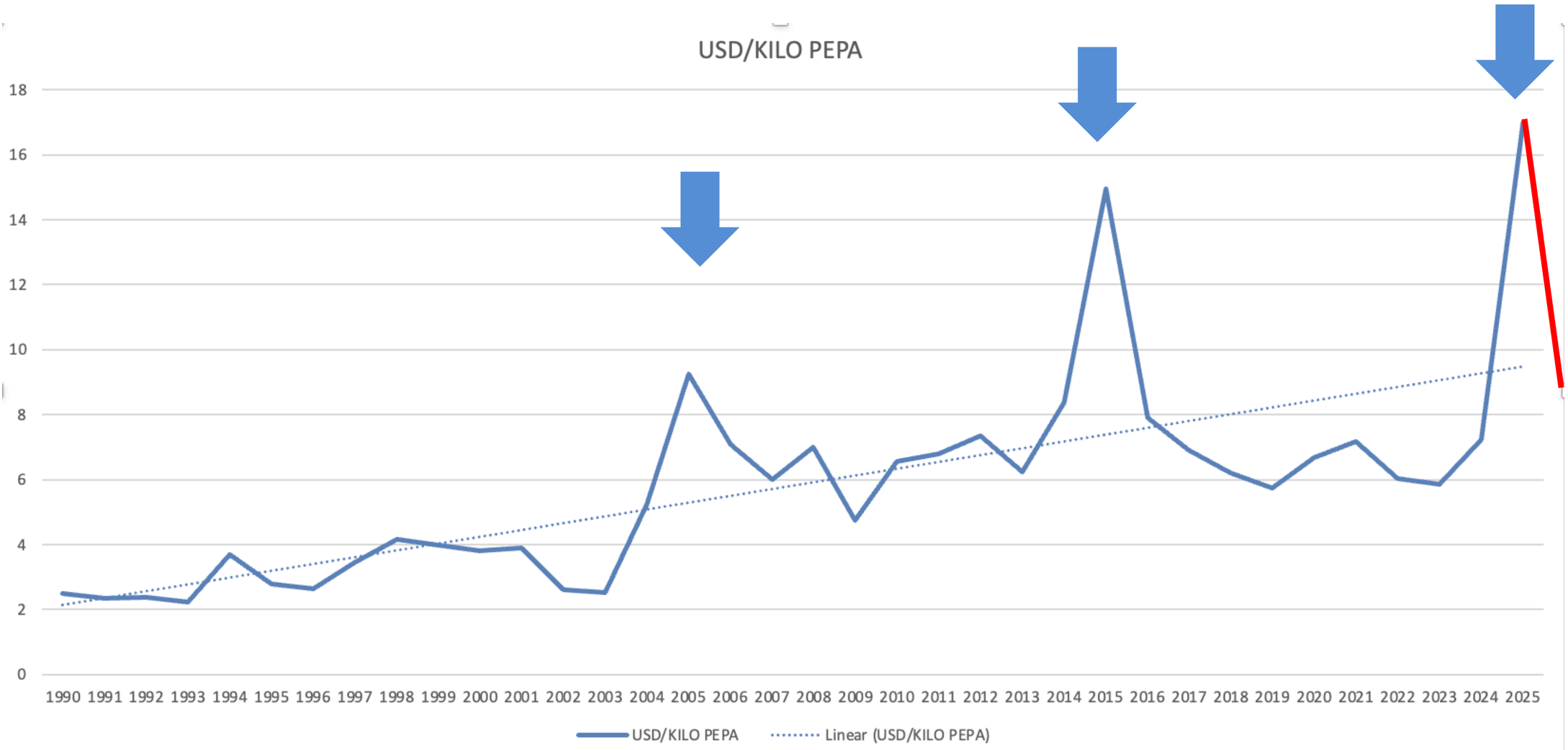
WORLD CONSUMPTION (Supply - End. Stock)	**1,077,100**

32%

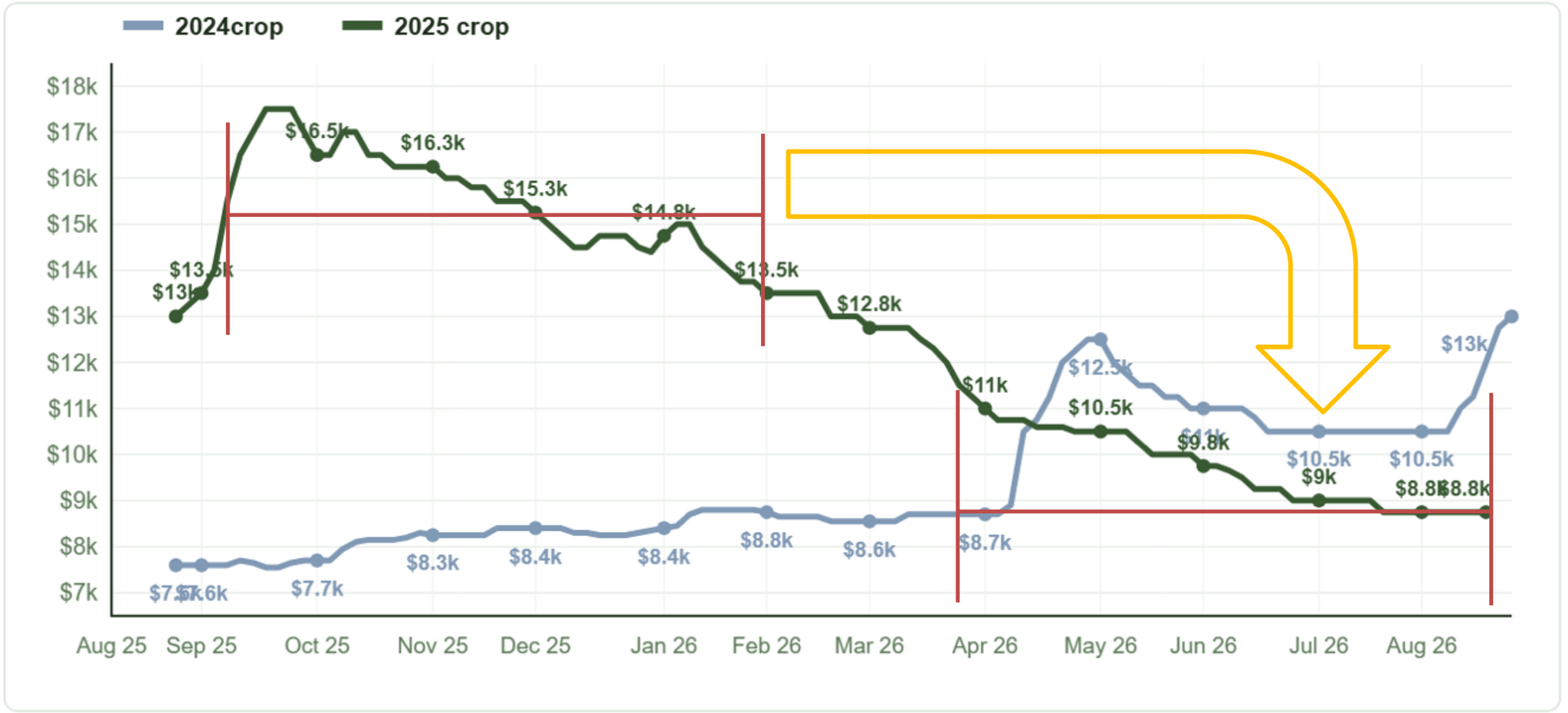
$/KG -40%

Sources 2025/26: Blacksea Hazelnut Exporters' Association, Hazelnut Committee of Chile, China Chamber of Commerce for Import and Export of Foodstuffs, AEOFRUSE, and other INC sources. Sources 2026/27: Blacksea Hazelnut Exporters' Association, AEOFRUSE, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

PRECIO EN GRANO DESDE 1990 (USD/KG.)

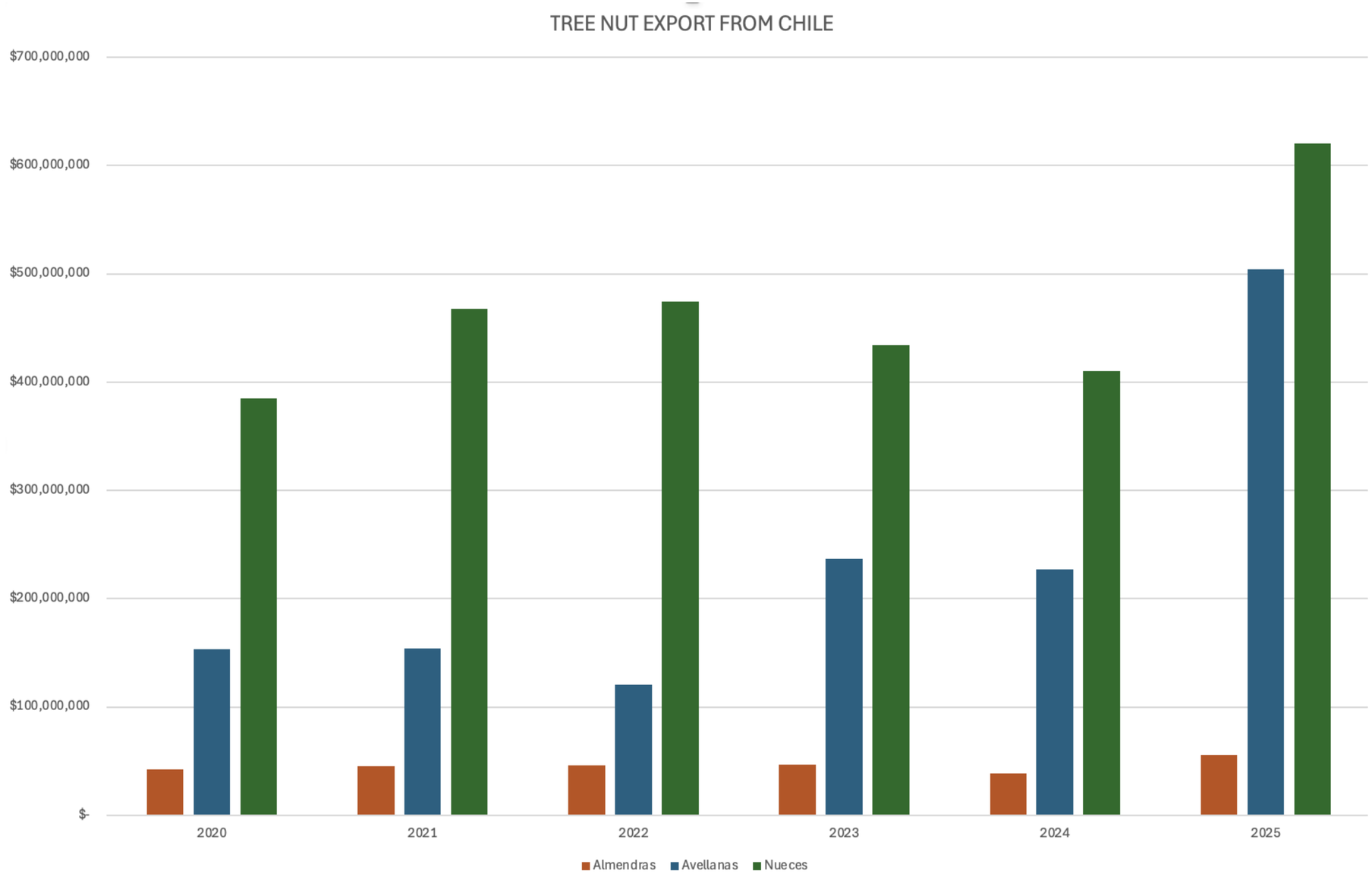


Precio en grano desde 2025 al 2026 (Voicevale)



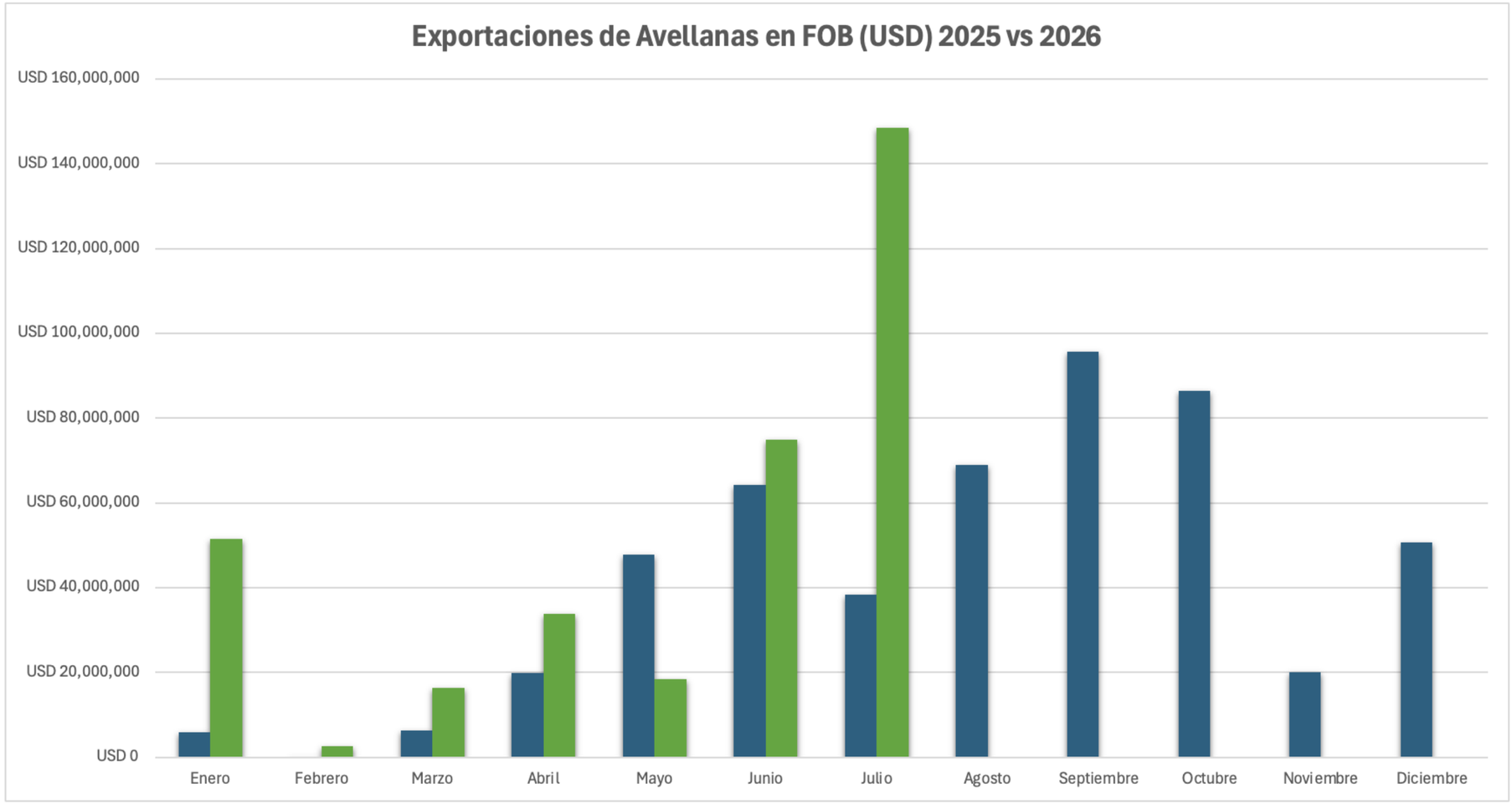
FRUTOS SECOS EXPORTADOS DESDE CHILE

FOB $USD, ProChile (Aduanas Dic. 2025)



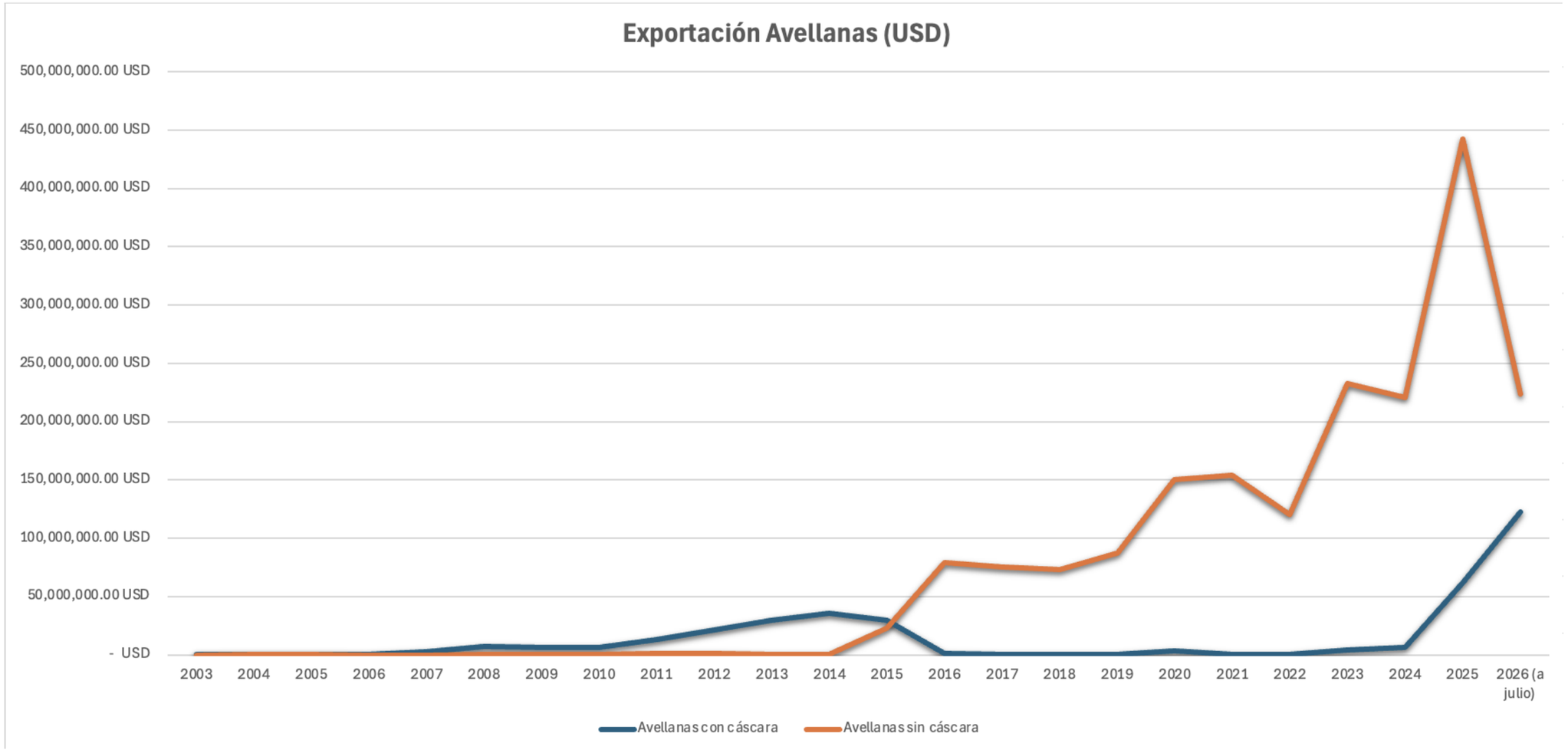
FRUTOS SECOS EXPORTADOS DESDE CHILE

FOB $USD, ProChile (Aduanas Jul. 2026)



EXPORTACIONES CON y SIN CASCARA DE AVELLANAS

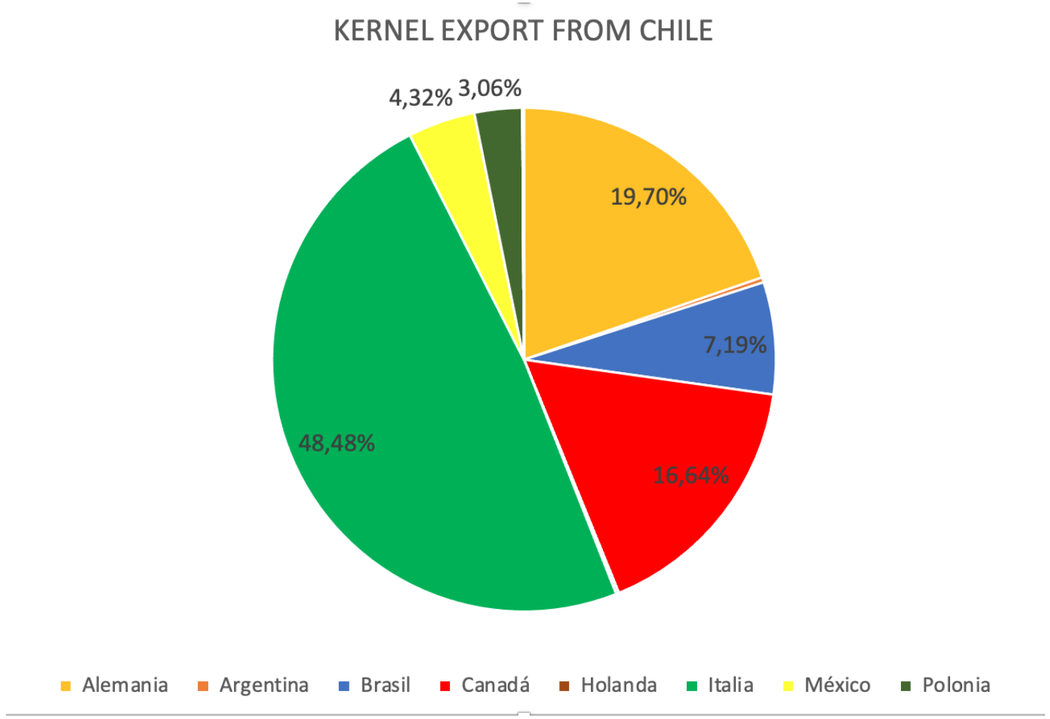
FOB $USD, ProChile (Aduanas Jul. 2026)

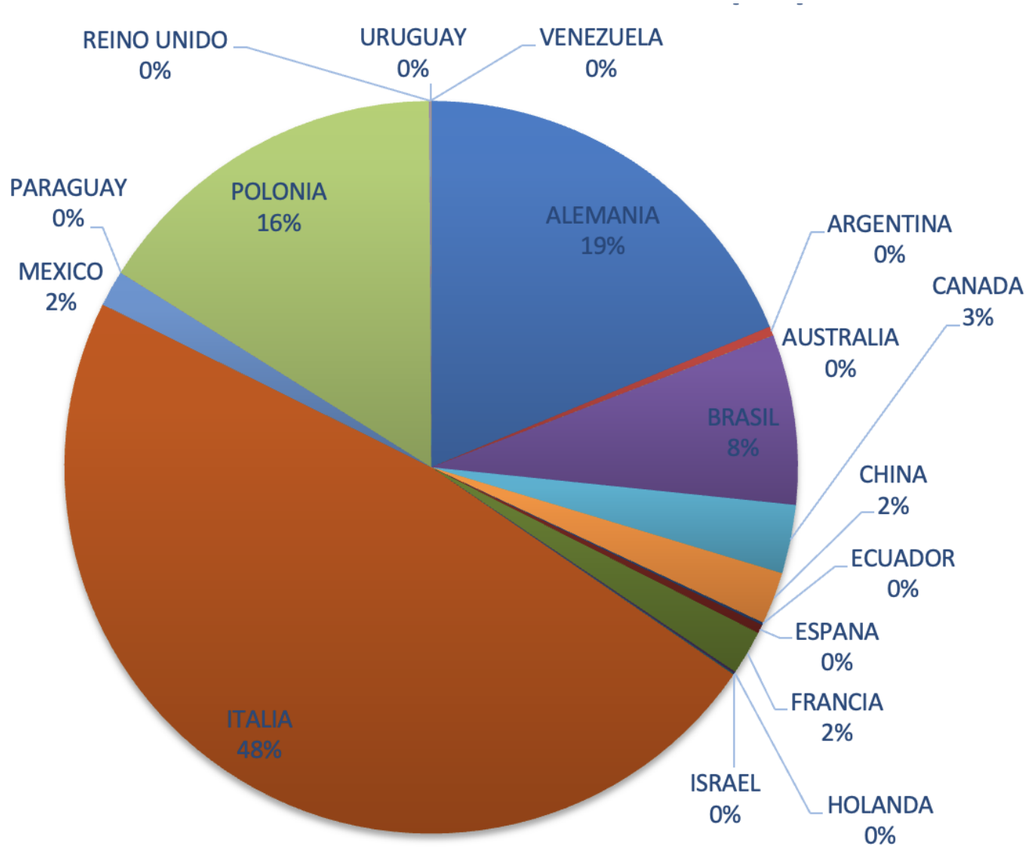


Ref: PROCHILE- Aduanas de Chile https://www.aduana.cl/aduana/site/edic/base/port/comex.html

DESTINO AVELLANAS CHILENAS

ProChile (Adunas 2025)

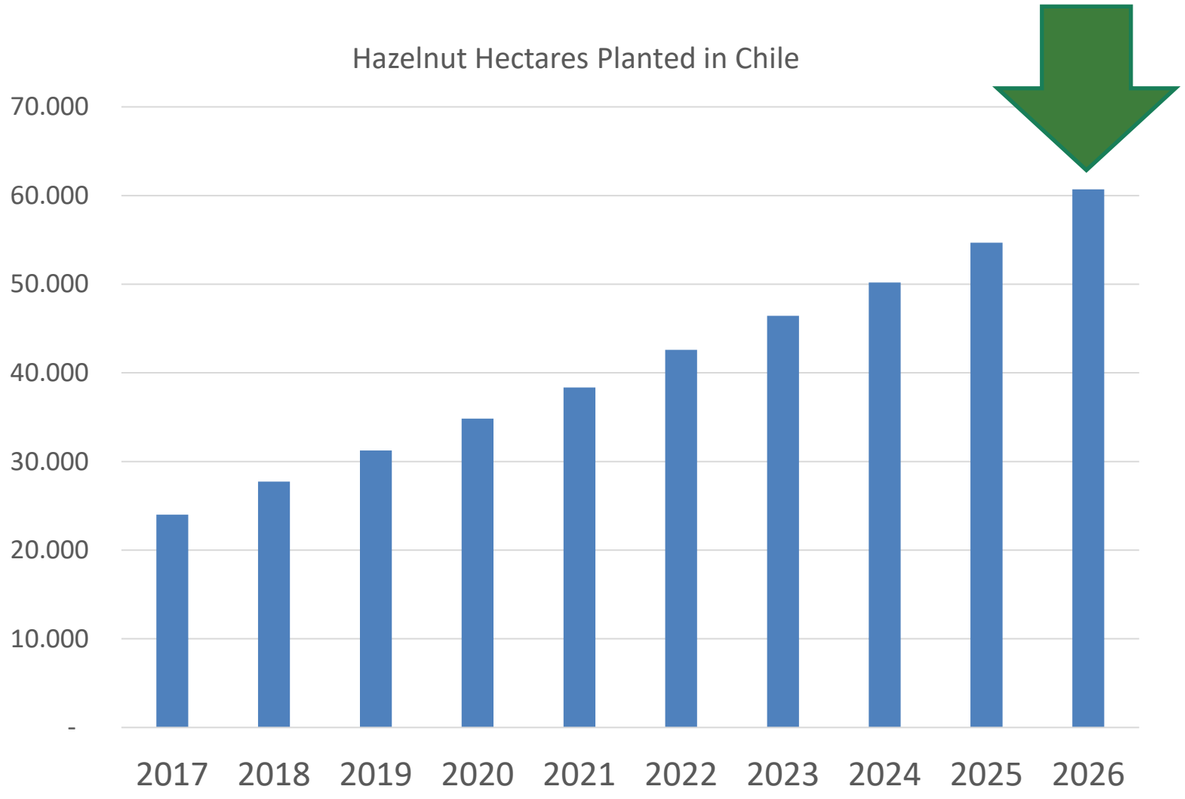


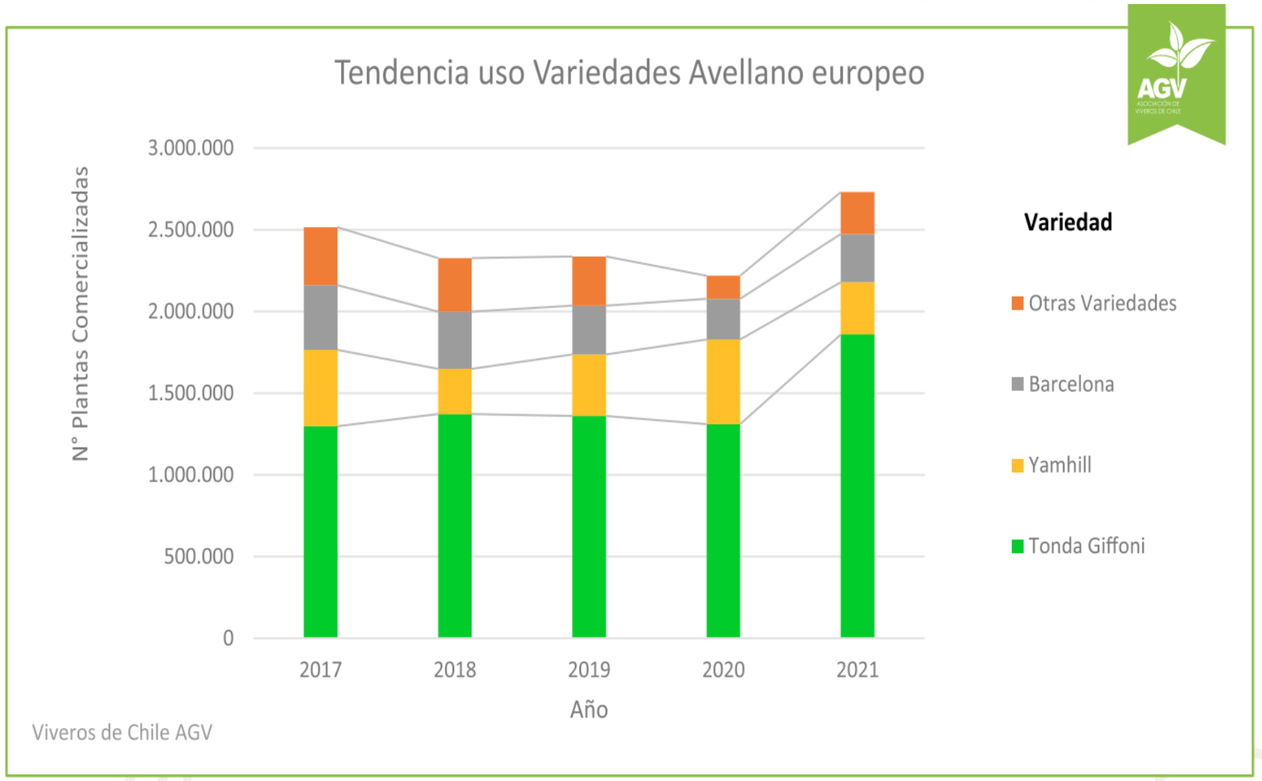


Ref: PROCHILE- Aduanas de Chile https://www.aduana.cl/aduana/site/edic/base/port/comex.html

HECTARAS DE AVELLANAS PLANTADAS EN CHILE

~70.000 HA.



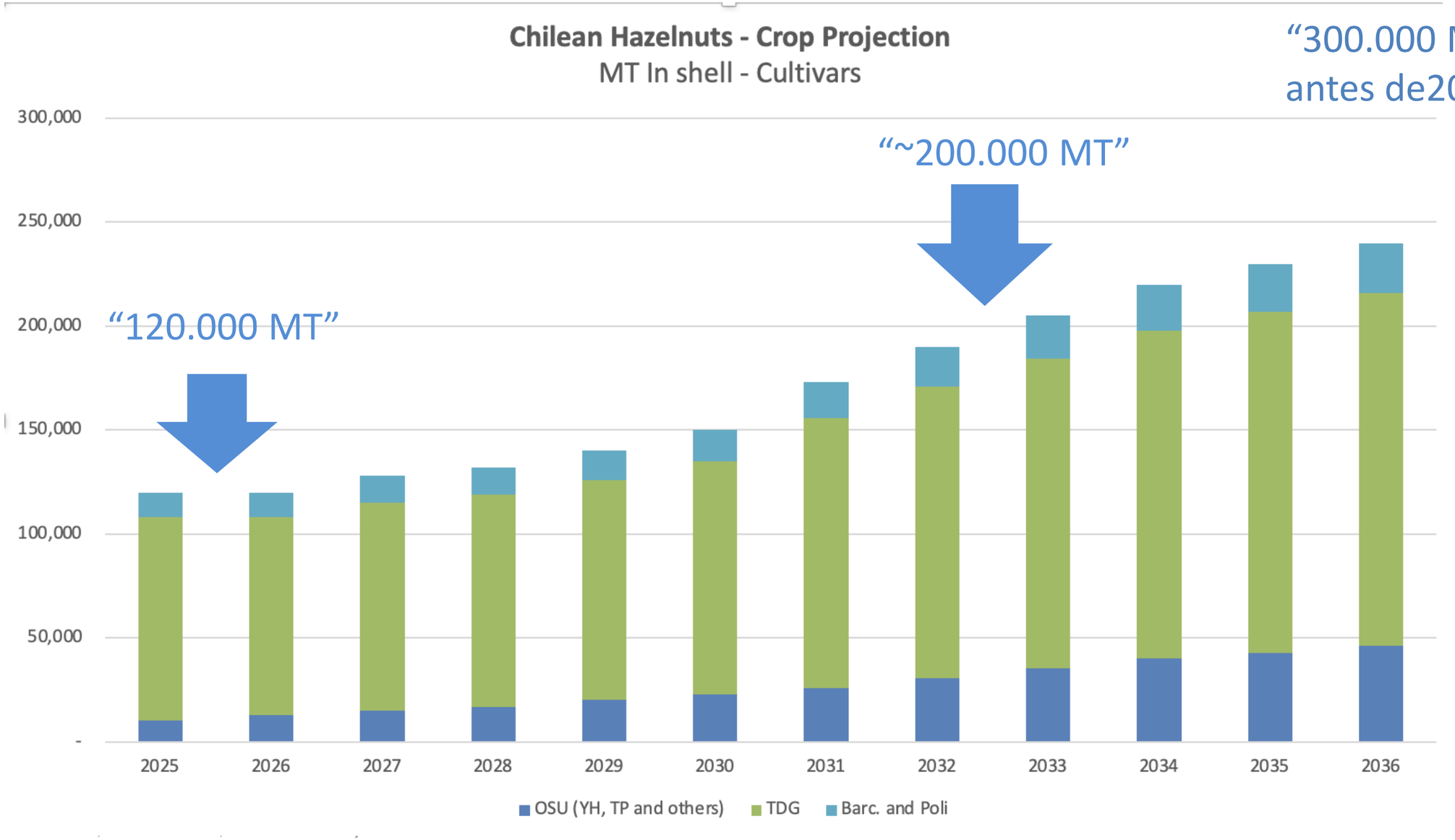


Asociacion Gremial de Viveros de Chile AGV

https://www.odepa.gob.cl

(A.Reyes, J.Mohr)

PRODUCCION DE CHILE EN CASCARA y VARIEDADES

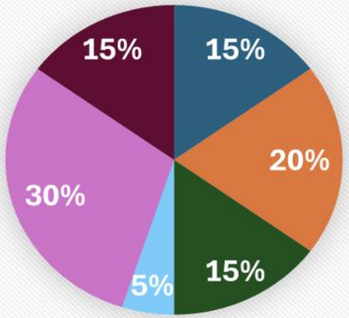


DISTRIBUCION DE COSTOS PRODUCTIVO

Hazelnuts Round Table
PRODUCTION COSTS

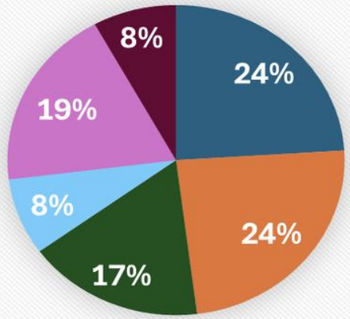
macao
43rd INC WORLD NUT AND DRIED FRUIT CONGRESS
MAY 12-14, 2026

Italian Production Cost



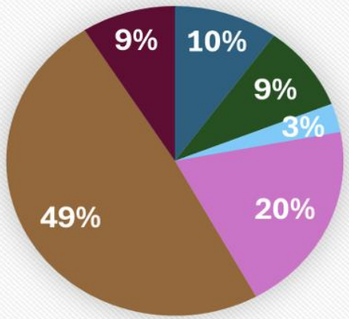
Fertilizer | Energy | Phytosanitary & Foliar Spray | Herbicide | Workforce | Other

Chile Production Cost



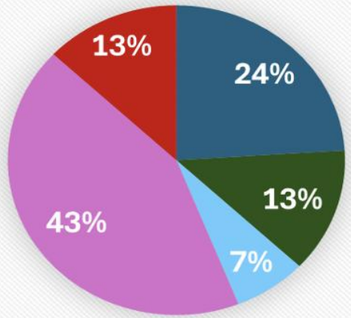
Fertilizer | Energy | Phytosanitary & Foliar Spray | Herbicide | Workforce | Other

Georgia Production Cost



Fertilizer | Phytosanitary & Foliar Spray | Herbicide | Workforce | Harvest | Other

Chinese Production Cost



Fertilizer | Phytosanitary & Foliar Spray | Herbicide | Workforce | Prunning

CONSUMO PERCAPITA KG/PC INC 2024

WORLD HAZELNUT ESTIMATED CONSUMPTION, TOP CONSUMERS / (kernel equivalent)															
	2020			2021			2022			2023			2024		
Country	Consumption (MT)	Cons. per capita (kg/year)	Estimated Cons. per capita (kg/year)	Consumption (MT)	Cons. per capita (kg/year)	Estimated Cons. per capita (kg/year)	Consumption (MT)	Cons. per capita (kg/year)	Estimated Cons. per capita (kg/year)	Consumption (MT)	Cons. per capita (kg/year)	Estimated Cons. per capita (kg/year)	Consumption (MT)	Cons. per capita (kg/year)	Estimated Cons. per capita (kg/year)
Germany	86,335	1.036	1.151	113,239	1.358	1.508	107,832	1.293	1.437	118,697	1.425	1.583	110,052	1.302	1.446
Italy	122,974	2.067	2.296	89,125	1.504	1.672	106,591	1.805	2.006	98,015	1.665	1.850	106,241	1.790	1.989
Türkiye	37,583	0.447	0.496	48,471	0.572	0.635	52,423	0.614	0.683	85,890	1.001	1.112	64,249	0.734	0.816
China	18,939	0.013	0.053	29,534	0.021	0.083	25,692	0.018	0.072	36,558	0.026	0.103	33,740	0.024	0.095
France	27,786	0.431	0.575	32,672	0.506	0.675	27,616	0.427	0.570	31,085	0.480	0.640	26,063	0.392	0.522
Poland	16,217	0.422	0.563	21,369	0.558	0.744	18,933	0.475	0.633	19,437	0.474	0.632	24,919	0.647	0.862
Canada	11,773	0.311	0.414	11,819	0.310	0.413	13,342	0.347	0.463	18,924	0.488	0.651	21,002	0.528	0.705
Russian Fed.	14,055	0.097	0.386	14,430	0.099	0.398	16,699	0.115	0.462	18,272	0.126	0.506	15,799	0.109	0.436
Spain	9,873	0.208	0.417	11,175	0.235	0.471	13,686	0.288	0.576	14,239	0.300	0.599	14,628	0.305	0.611
USA	18,855	0.056	0.170	18,624	0.055	0.167	23,240	0.069	0.208	17,167	0.050	0.153	14,421	0.042	0.127
Austria	12,069	1.355	1.505	13,421	1.504	1.671	12,160	1.360	1.511	12,731	1.421	1.579	12,512	1.372	1.524
Switzerland	10,142	1.174	1.304	10,535	1.212	1.347	10,934	1.251	1.390	11,495	1.307	1.452	10,436	1.170	1.300
Belgium	10,580	0.915	1.017	10,934	0.942	1.046	10,126	0.869	0.965	10,662	0.912	1.014	9,564	0.815	0.905
Iran	8,897	0.102	0.204	12,749	0.145	0.290	6,489	0.073	0.147	7,236	0.081	0.162	9,070	0.099	0.198
Brazil	5,406	0.025	0.101	6,701	0.031	0.125	6,956	0.032	0.129	8,568	0.040	0.158	8,015	0.038	0.151
Algeria	756	0.017	0.174	1,940	0.044	0.439	1,887	0.042	0.420	2,834	0.062	0.621	5,381	0.115	1.150
UK	6,201	0.092	0.280	9,607	0.143	0.433	5,180	0.077	0.232	4,828	0.071	0.216	5,050	0.073	0.221
Egypt	5,856	0.054	0.218	7,388	0.068	0.270	3,751	0.034	0.135	4,022	0.036	0.143	4,972	0.043	0.171
Australia	4,327	0.169	0.511	3,834	0.148	0.448	3,613	0.138	0.418	3,421	0.129	0.392	4,064	0.152	0.461
Greece	3,121	0.297	0.594	4,086	0.391	0.782	3,388	0.326	0.652	3,474	0.336	0.672	3,877	0.386	0.772
WORLD TOTAL	**469,070**	**0.128**	**0.450**	**519,078**	**0.151**	**0.444**	**512,858**	**0.140**	**0.450**	**567,767**	**0.150**	**0.449**	**549,090**	**0.147**	**0.419**

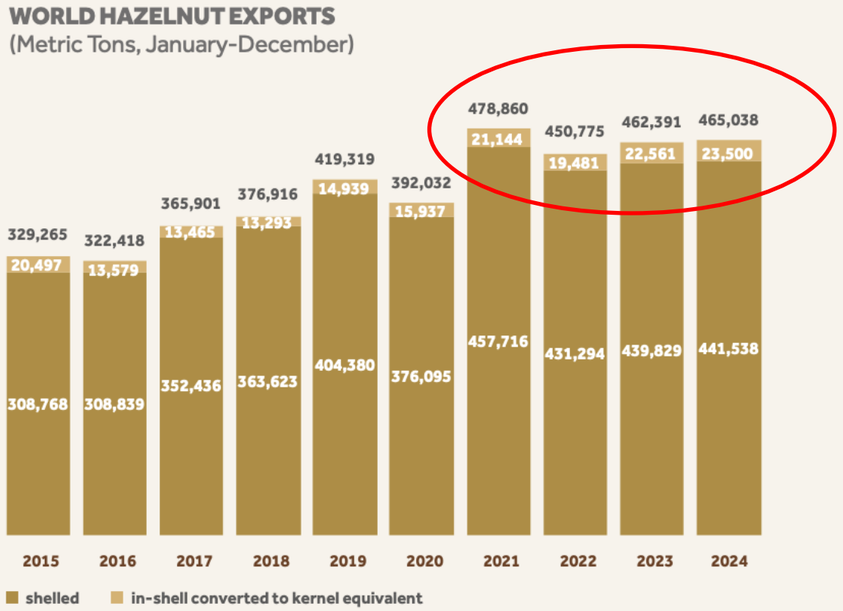
75% Europa

8.6% América

6.6% Asia

9.2% Otros

CONSUMO INC 2024



INC NUTS & DRIED FRUIT GLOBAL STATISTICAL REVIEW 2025

EXPORTS

HAZELNUTS

En las ultimas decadas las **exportaciones de avellanas aun aumentado continumente** de 329.265 MT en 2025 a 478.860 MT en 2021 y mantenidas sobre 450.000 MT desde esa fecha. El total de envios en 2024 lleg a 465.038 MT (en grano).

Turquia se manteine como el principal exportyador con un 69% en 2024 y un promedio de 68% en los ultimos cinco años, seguido por USA 6%, Chile, Arzeibaijanm e Italia con entre un 4-5%.

Europa sigue siendo el principal destino de las avellanas, con un 67% de las compras en cascara y un 80% de las compras en grano. Alemania es el comprador mayor, seguido por Italia que es un procesador estrategico.

CATEGORIAS DE COMPRA

Grano
90%

En Cascara
10%

INDUSTRIA CHOCOLATES
70%

BAKERY 15%

SNACK 15%

OIL 5%

11-13mm
45%

13-15mm
30%

PASTE
20%

9-11mm
5%

2021 - GRUPO HIJUELAS & NEFUEN TRADING

CATEGORIAS DE COMPRA

Grano
90%

En Csacara
10%

INDUSTRIA CHOCOLATES
70%

BAKERY 15%
SNACK 15%
OIL 5%

11-13mm
45%

13-15mm
30%

PASTE
20%

9-11mm
5%

11-13 m
14,5%

13-15mm
58%

15mm
27%

9-11mm
0,3%

2021 - GRUPO HIJUELAS & NEFUEN TRADING

FERRERO

STORCK

Ritter
SPORT

Nestlé

Lindt
MASTER CHOCOLATIER
SINCE 1845

Kellogg's

Mondelēz
International

Ludwig
Schokolade

Manner

Seeberger

ültje

MERCADONA

TESCO

LIDL

ALDI

Intersnack

Besana
QUALITY NATURALLY

IMPORTACO

ZERTUS
SINCE 1826

Hazelnuts Round Table

CURRENT DEMAND

macao
43rd INC WORLD NUT AND DRIED FRUIT CONGRESS
MAY 12-14, 2026

- 75 %
- 10 %
- 7 %
- 5 %
- 3 %

Que se entiende por Calidad de fruta?

UNECE STANDARD DDP-04

concerning the marketing and

commercial quality control of

HAZELNUT KERNELS

2025 EDITION

UNITED NATIONS
New York and Geneva, 2025

Defects allowed	*Tolerances allowed percentage of defective hazelnut kernels, by number or weight*		
	"Extra"	*Class I*	*Class II*
(a) Tolerances for hazelnut kernels not satisfying the minimum requirements	5	14	18
of which no more than:			
Not sufficiently developed, shrunken and shrivelled	2	4	8
Mouldy	0.5	1.5	2.5
Rancid or damaged by pests, rotten or deteriorated	2	4	6
of which rancid not more than	1	2	3
Damaged kernels and pieces not passing through a 5 mm round meshed sieve (by weight)	3	8	10
Pieces passing through a 5 mm round meshed sieve (by weight)	0.5	1	2
Living pests	0	0	0
(b) Size tolerances (if sized)[a]			
For produce not conforming to the size indicated, in total			
For round	10	10	10
For pointed and oblong	15	15	15
If sized with 1mm intervals			
For round	15	15	15
For pointed and oblong	20	20	20
(c) Tolerances for other defects			
Extraneous matter (of organic origin) such as loose shells, shell fragments, fragments of hull, leaves, dust or foreign matter (of inorganic origin) such as stones, metal, and glass (by weight)	0.25	0.25	0.25
Twin kernels	2	5	8
Hazelnut kernels belonging to varieties or commercial types other than that indicated	10	10	10

[a] The presence of hazelnuts 0.2 mm above or below the size laid down shall not be regarded as a defect.

Que se entiende por Calidad de fruta?

Mat.-Nr.	143247
Product	hazelnut paste A quality
Form	Pasty
Smell/taste	Product specific
Color	Brown
Description	100 % hazelnuts enough roasted and from the current crop. No hazelnut press cake, no addition of foreign oils or hazelnut oil. Mineral oil components: MOSH C10-16: <12 mg/kg MOSH C17-20: < 4 mg/kg MOAH: < 0,5 mg/kg Rancimat limit from March to September: >5,5 hours

Chemical data			
Parameter	**Target values**	**Unit**	**Method**
Antioxidants	0-0	µg/g	external, LC-MS/MS
Fat content	59,00-68,00	%	NIR
Induction time, 130 °C	6,00-8,50	Hour	ISO 6886
Moisture	0,00-1,00	%	Halogen Moisture Analyser
Steradiene (adulterations)	0,00-0,00	mg/kg	ISO 15788-2:2005-02, mod., LC-DAD
Toluene	0,000-0,050	mg/kg	external, HS-GC-MS
ffa-value	0,00-0,50	%	ISO 660, FFA
hexane	0,000-0,000	µg/g	external, HS-GC-MS
Microbiological data			
Parameter	**Target values**	**Unit**	**Method**
E. Coli	0-0	CFU/g	ISO 7218
Salmonellae, CFU/25g	not detectable		external, ISO 6579-1
Total Coliforme	0-10	CFU/g	ISO 7218
Total Plate Count	0-1000	CFU/g	ISO 7218
moulds	0-50	CFU/g	ISO 7218
yeast	0-50	CFU/g	ISO 7218
Mycotoxins			
Parameter	**Target values**	**Unit**	**Method**
Aflatoxin B1	0,00-5,00	µg/kg	HPLC-FLD or external LC-MS/MS
Aflatoxin total	0,00-10,00	µg/kg	HPLC-FLD or external LC-MS/MS
Ochratoxin A	0,00-5,00	µg/kg	external, LC-MS/MS
Physical data			
Parameter	**Target values**	**Unit**	**Method**
Lab-colour space - L*-axis	36,8-39,1		Colorimeter Konica Minolta CR410
Lab-colour space - a*-axis	8,3-9,3		Colorimeter Konica Minolta CR410
Lab-colour space - b*-axis	10,4-13,3		Colorimeter Konica Minolta CR410

Que se entiende por Calidad de fruta? (IA)

- **Calibre y tamaño:** Los mercados y las fábricas piden frutos de un tamaño uniforme y específico (medido en milímetros), ya que los procesos industriales se adaptan a estándares fijos.

- **Rendimiento industrial (porcentaje de pepa):** Se refiere a la proporción de grano útil en relación con la cáscara. Un alto rendimiento supera el 45% de semilla aprovechable.

- **Ausencia de defectos:** La fruta no debe presentar daños graves como frutos vanos (vacíos por dentro), frutos chupados o deformados, presencia de mohos o semillas dobles y arrugadas.

- **Perfil químico y nutricional:** Se evalúan niveles adecuados de aceites (ácidos grasos saludables), proteínas y la total ausencia de contaminantes o toxinas (como aflatoxinas) o residuos químicos no permitidos.

- **Sabor y frescura:** La avellana debe conservar el sabor tradicional, limpio y característico que espera el consumidor, sin rastros de rancidez.

- **Trazabilidad y certificaciones:** Implica conocer el origen exacto del huerto y las buenas prácticas agrícolas e industriales mediante sellos de sustentabilidad y inocuidad

Tamaños de granos por variedad

Selection	>15mm	13.5-15mm	11-13.5mm	9-11mm
Wepster	2	43	55	0
Yamhill	0	46	51	0
Sacajawea	7	77	16	0
McDonald	40	53	7	0
York	20	75	5	0
Dorris	34	62	4	0
Jefferson	87	13	1	0

Means of 4 years (2009-2012), 7 trees per cultivar.

Oregon State University

Nut Evaluation (Laboratory for nut selection)

TABLE 1. Comparison of nuts and kernel of O.S.U cultivars harvested in “Fundo El calabozo “in Osorno area, South of Chile using the O.S.U evaluation model.

GENOTYPE	NUT WT(g)	KERNEL WT (g)	10- KERNEL PERCENTAGE (%)	FIBER	PELLICLE REMOVAL (BLANCHING)
Dorris	2,82	1,30	46,0	3.5	2
T. Pacífica	2,4	1,10	45,8	2.5	2
Yamhill	1,91	0,92	48,2	1.5	3
McDonald	2,29	1,18	51,5	2.5	3.5
Sacajawea	2,59	1,35	52,7	2	2.5
Polly O*	3,02	1,39	45,8	2	3
Wepster	2,27	1,02	44.9	2.5	1.5

*2 years old plant

Calidad de las avellanas

Varaity	Origen	Frequency (%)								g.	
		Kernel	Moldy kernels	Internal Mold	Black tips	Shrivel Kernels	11-13 mm	13-15 mm	>15 mm	Kernel weight	Nut Weight
Yamhill	Agroveen	46.50	0.90	1.00	1.90	0.50	60.50	28.50	2.70	1.01	1.68
Yamhill	Santa Isabel	48.10	-	-	1.10	5.30	29.90	64.20	5.20	0.81	2.35
Yamhill	Las Marías	47.40	-	-	1.10	0.30	28.80	68.40	1.30	1.04	2.09
Yamhill	Flor del Laja	48.80	-	-	-	-	82.50	10.20	-	1.07	2.31
Yamhill	Forrahue	43.00	-	-	-	1.00	43.70	47.20	0.08	1.14	2.33
Yamhill	San Pablo	43.30	-	-	1.00	0.40	45.10	48.50	1.40	1.13	2.36
Yamhill		**46.18**	0.15	0.17	0.85	1.25	**48.42**	**44.50**	**1.78**	1.03	2.19
Tonda Pacífica	Puerto Mori	40.00	1.00	-	1.00	1.50	31.82	64.00	3.00	1.14	2.51
Tonda Pacífica	Santa Gabriela	41.72	-	-	-	-	17.80	81.10	-	1.46	2.93
Tonda Pacífica	Bopar	46.00	-	-	-	-	21.90	73.40	4.70	1.24	2.74
Tonda Pacífica		**42.57**	0.33	-	0.33	0.50	**23.84**	**72.83**	**2.57**	1.28	2.73
Dorris	San Pablo	42.50	1.50	-	1.10	1.00	4.00	70.00	26.00	1.24	2.77
Dorris	La Cumbre	40.70	-	-	1.30	-	17.00	75.90	3.20		
Dorris	Puerto Mori	44.20	-	-	1.50	1.30	26.30	57.20	14.00		
Dorris		**42.47**	0.50	-	1.30	0.77	**15.77**	**67.70**	**14.40**	1.24	2.77

Comentarios finales

- Chile se esta consolidando como el segundo pais productor del mundo de avellanas y va seguir siendo un actor clave para la industria mundial con **Calidad, trazabilidad y sustenabilidad** caracteristicas que no tiene paises productores tradicionales.

- Chile es el pais con **un bajo costo productivo $USD/KG**, esto da estabilidad y seguridad a el negocio, 1/3 del precio de venta en regimen y con precio realisata a conservador en el largo plazo

- La Avellana es un **ingrediente para industria**, con un mercado estable si se produce los tamaños de granos o pepa que mas se demandan en el mundo

- Los desafios de la industria Chilena son **mantener la calida** con **proceso industriales rapidos y modernos**, que permitan consolidar a Chile en un mercado mas diverso.

- Clave no dejar de lado las **buenas praciticas agricolas, trazabiliad, sustentabiliad**, esto nos va **diferenciar en el largo** de nuestras competencias.

- La Avellana Europea Chile tiene una oportunidad unica para aumentar el consumo y la demanda de la avellana via snack en zonas de consume tradicional pero tambien en nuevos mercados y continentes, esto al ser fresca y contra estacion, pero para esto hay **precios de equilibrio** que tiene que funcionar para toda la cadena, desde el productor, industrial y consumidor final.