

American
PECANS

ANNUAL REPORT

2025

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MESSAGE FROM THE CEO



“ THESE ARE MEANINGFUL STEPS FOR A RELATIVELY YOUNG MARKETING ORDER, AND THE RETURNS ARE ALREADY VISIBLE. ”

As the name suggests, marketing orders – like the American Pecan Council – were created to bring stability to commodity markets so farmers can invest with confidence. While the pecan market continues to face real challenges, this past year showed clear progress toward more stable conditions.

One example is data. The pecan marketing order requires handlers to report purchase and sales volumes to the APC, and over the past year, we’ve put that information to work in new reports, videos, and webinars. These tools are helping growers make better-informed decisions as they plan and market their crop.

We also secured \$1.3 million in federal grants, enabling APC to expand its marketing efforts worldwide. Those investments helped stabilize U.S. pecan exports during an otherwise volatile year for agricultural trade. Combined with strong domestic demand, the 2024/2025 crop year ended with the lowest uncommitted handler inventory since APC began.

At the same time, we launched new efforts to protect the premium reputation of American pecans – strengthening our industry’s ability to meet global food safety requirements and helping international buyers better understand the unique challenges of pecan production.

These are meaningful steps for a relatively young marketing order, and the returns are already visible. In the year ahead, we’ll continue putting growers at the center of our work and building momentum toward long-term, sustainable growth for our industry.

– Anne Warden, CEO

MESSAGE FROM THE CHAIR



As Chair of the American Pecan Council, I am proud to reflect on the momentum our organization continued to build in 2025 and the critical role APC plays in advancing the pecan industry.

In a rapidly evolving marketplace, APC remains uniquely positioned to collect, analyze, and share industry data that helps growers, shellers, and processors make informed business decisions. These insights not only support near-term planning but also aim to strengthen the long-term stability and competitiveness of our industry.

APC plays a vital role in helping the industry take advantage of government funding programs that expand export opportunities and support growth in key international markets. By aligning strategy and resources, we are helping American pecans compete more effectively on the global stage.

Our work on grades and standards and food safety initiatives elevate the premium reputation and quality of American Pecans, setting them apart with customers worldwide.

We appreciate the trust you place in APC to act in the best interest of the industry, and we look ahead with confidence as we unlock new opportunities and strengthen the global position of American pecans.

- Larry Don Womack, APC Chair

COUNCIL & COMMITTEES

The American Pecan Council was founded in 2016, comprised of pecan growers, accumulators and shellers. APC's mission promotes the benefits of the American Pecan to build consumer demand, develop markets and establish industry standards.

INTERNATIONAL COMMITTEE:

Opening up and building relationships with a diverse set of priority export markets

GRADES, STANDARDS & RESEARCH COMMITTEE:

Driving grades and standards and food safety protocols, as well as product and production research

INDUSTRY RELATIONS COMMITTEE:

Communicating the work while activating the industry on production, distribution and marketing opportunities

MARKETING PROMOTIONS COMMITTEE:

Providing key insights, resources and B2B engagement across the value chain to help inform business decisions, marketing endeavors and product innovation.

COUNCIL & COMMITTEES

Larry Don Womack
Chair of the Full Council, Grower
Central Region

Deborah Walden-Ralls
Vice-Chair, Grower
Western Region

Justin Jones
Secretary, Grower
Eastern Region

Lalo Medina
Treasurer, Grower
Central Region

Brent Brinkley
Grower
Eastern Region

Taylor Moses
Grower
Eastern Region

Lenny Wells
Grower
Eastern Region

Molly Willis
Grower
Eastern Region

Lisa Jackson
Grower
Central Region

Vada Lucas Jr.
Grower
Central Region

Randy Stephens
Grower
Central Region

Josh Bowman
Grower
Western Region

Mark Hendrixson
Grower
Western Region

Frank Salopek
Grower
Western Region

Alexander Wright
Grower
Western Region

John Taylor
Sheller
Eastern Region

Alex Willson
Sheller
Eastern Region

Jeff Worn
Sheller
Eastern Region

Jared Miller
Sheller
Central Region

Jake Montz
Sheller
Central Region

Evo Soria
Sheller
Central Region

Steve Zaffarano
Sheller
Central Region

Brandon Harrell
Sheller
Western Region

Blake Houston
Sheller
Western Region

Will Easterlin
Accumulator, At-Large Member

Mark Hamilton
Accumulator, At-Large Member

Lawton Pearson
Grower
Eastern Region

Chad Selman
Grower
Central Region

Brycen Salopek
Grower
Western Region

Sally Arn
Sheller
Eastern Region

Greg Salopek
Sheller
Western Region

Vacant
Sheller
Western Region

Erika Hinsberger
Public, At-Large Member

Dr. Luis Ribera
Public, At-Large Member

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2025 HIGHLIGHTS AT A GLANCE

1:1 Funding:

Government grants applied for by APC doubled international funding in 2025.¹

Cracking the India Market:

The average sales lift for pecans both at physical and online retail from APC promotions was over 100%.²

Expanding in the UK:

APC Retail promotions saw a 64% increase in pecan sales, with a 130% lift during actual promotional periods.³

Re-emerging in Germany:

Efforts to establish APC's retail footprint in Germany saw partnerships with more than 600 stores and an average sales lift of 71% in promotional locations.⁴

Expanding the Data:

A new market analysis + dynamic graphs offer broader insights into the pecan crop, reserves and global export opportunities.

One Stop Shop:

APC launched a new website + LinkedIn, aggregating all marketing and data resources in one spot and sharing industry news.

Supporting Digital Sales:

A new digital consulting service helped industry maximize their own online and ecommerce presence; more than 12 engagements to date.

Driving Nutrition:

A published nutrition study from Penn State generated positive media coverage across U.S. and International news outlets, yielding 3.5B potential impressions.

Launched a New Quarterly Report on Export Regulations

¹APC FY25 Budget

²Proprietary data from retailers obtained by SS Associates India, based on the FY25 fiscal year (Oct 2024 - Sept 2025)

³Proprietary data obtained by The Garden Marketing & PR, based on the FY25 fiscal year (Oct 2024 - Sept 2025)

⁴Proprietary data obtained by The Garden Marketing & PR, based sampling programs held from June - Sept 2025 across 599 stores

HIGHER VALUE THROUGH NUTRITION

BACKGROUND:

Pecans are loved for their taste, but not as well-known for their unique health benefits. As a result, pecans have been seen as a dispensable, price-elastic purchase rather than essential. Our goal was to increase consumer perceptions of pecans as a nutritious and essential part of the diet to maintain demand and support industry profitability.

STRATEGY:

Increase consumer belief that pecans are a highly valued and an essential part of the diet

PROGRAM AREAS:

Increase consumer belief that pecans are a highly valued and an essential part of the diet



HIGHER VALUE THROUGH NUTRITION

ACTIVATION OVERVIEW:

While our nutrition research efforts have moved under APPB, we saw great results in FY25 from the publishing and promotion of the APC-funded Penn State study on how in a randomized trial, ‘consuming pecans as a snack improves lipids/lipoproteins and diet quality compared with usual diet in adults at increased risk of cardiometabolic diseases’.

RESULTS:

Results of the study were published in American Journal of Clinical Nutrition and were picked up by 16 notable media outlets including Women’s Health, Parade, Newsweek, and BBC Science Focus. Press and syndicated pick-up resulted in a 3.5B potential impressions.

INCREMENTAL VOLUME THROUGH EXPORTS

BACKGROUND:

Consumption of nuts is increasing due to growing interest in healthy snacks, protein sources and ingredients; however, pecans are not as high in the consideration set compared to other nuts.

Our FY25 goal was to prioritize key markets (India, UK and Germany) and forge relationships with international buyers and retailers who help drive trial among consumers to create awareness of American Pecans.

STRATEGY:

Increase the incremental volume of U.S. pecans exported to a wider range of global markets.

PROGRAM REGIONS:

India, United Kingdom, Germany



INCREMENTAL VOLUME THROUGH EXPORTS

ACTIVATION OVERVIEW:

APC advanced global awareness, trial, and demand for American pecans through integrated, market-specific strategies across India, the United Kingdom, and Germany. Efforts focused on expanding retail and e-commerce distribution and building relevance through chef engagement, culinary education, influencer outreach, and targeted PR. From large-scale retail activations and airline sampling in India to nationwide in-store promotions in the UK and the launch of a new retail footprint in Germany, APC positioned American pecans as a premium, versatile snack and ingredient while delivering sales, increased visibility, and long-term momentum abroad.

INDIA

Retail promotions for American pecans were held with major retailers like Reliance Retail and specialized dry fruit and nut stores like Nuts and Spices, Bolas and more. Promotions included large in-store displays, POS material and sampling. E-commerce promotions were held with major platforms like Amazon, Flipkart and Blinkit.

RESULTS:

Average sales increase for pecans both at physical and online retail was over 100%.⁵

A special sampling program was done with Air India on the most sought after routes. 100,000 packs of pecans were distributed to flyers on the most frequented and premium Indian air routes including Mumbai-Delhi, and Mumbai-Bangalore.

Outreach with key opinion leaders and celebrities delivered unprecedented visibility for American pecans in India. More than 40 KOLs shared recipe- and nutrition-focused social media reels, generating over 20 million views and reaching 18 million people nationwide.

Targeted PR efforts with leading food and lifestyle media in India generated more than 180 placements, delivering over 700 million in reach and an earned media value exceeding \$470,000. Coverage appeared across top publications and digital platforms including *Times of India*, *Hindustan Times*, *Femina*, NDTV, and HT Slurp.

Special training centered around pecans was conducted at 10 top culinary institutes across India, led by four celebrated chefs and a nutritionist. Over 800 culinary students participated, with overwhelmingly positive feedback with 97% stating it increased their awareness of American pecans, their culinary uses, and health benefits. Additionally, 81% plan to use pecans in future recipes, and 83% reported their institutions will continue teaching the use of American pecans in future courses.⁶

⁵Proprietary data from retailers obtained by SS Associates India, based on the FY25 fiscal year (Oct 2024 - Sept 2025)

⁶Emerging Markets Program: India Results Report. September 2025

INCREMENTAL VOLUME THROUGH EXPORTS

UNITED KINGDOM

APC has continued to focus on driving consumer purchase through retail efforts to increase American Pecan distribution in stores across the nation, such as Costco, Tesco, Sainsbury's, Iceland Warehouse, Grape Tree Foods, on-Line retailer Ocado and Holland and Barrett.

RESULTS:⁷

UK in-store promotions focused on pecan snacking in over 5,200 stores, an increase of 30% over the number of UK stores promoting American pecans in FY24.

Pecan base rate sales from OFD promotions (3 total) has risen by 64% from 500kg per week to around 1,000kg per week. During the promotions amount almost doubles (2,300kg per week; up 130% each promo).⁸

Additional e-commerce activities delivered strong returns with the UK's 2 largest retailers Tesco and Sainsbury's, digital search activities in Sainsbury's yielded an additional \$41k pecan sales in 19 days.

Off fixture in-store displays throughout the year in Tesco increased sales by 84MT, pecan base rate sales by \$1.3m and also introduced 190k more Tesco shoppers to pecans over the previous year.

GERMANY

In FY25, we began establishing our retail footprint in the German market. In line with our strategy, we introduced German consumers to American pecans in the snack category, from June to September. Through point-of-sale promotions such as wobblers and additional printed items for American pecans, we had a presence in approximately 600 stores across three of the leading German retail grocery chains Edeka, Kaufland and Rewe.

RESULTS:

The national campaign achieved an average sales lift of 71% in those stores where we had a promotional presence.⁹

In-store samplings in 220 stores across the 3 chains introduced over 59,000 new German customers to

American pecans. A positive response rate of 52.2% towards the taste of American pecans was achieved during the tastings, as well as generating more visibility and acceptance as snacks for American pecans overall.

⁷ Proprietary data obtained by The Garden Marketing & PR, based on the FY25 fiscal year (Oct 2024 - Sept 2025)

⁸ Source: Tesco EPOS - Pecans featured on FSDU (10/2024 - 11/2025)

⁹ Proprietary data obtained by The Garden Marketing & PR, based sampling programs held from June - Sept 2025 across 599 stores

INDUSTRY RELATIONS AND READINESS THROUGH SERVICES

BACKGROUND:

It takes the entire supply chain to create a sustainable and profitable future for the industry. It is critical to provide access to pre-competitive marketing resources for the full industry to help drive informed business decisions.

STRATEGY:

Increase industry members' ability to activate on marketing opportunities and market intelligence.

PROGRAM AREAS:

Marketplace intelligence, quality initiatives, marketing guidance



INDUSTRY RELATIONS AND READINESS THROUGH SERVICES

ACTIVATION OVERVIEW:

The APC team strengthened industry alignment and decision-making by delivering timely marketplace intelligence, enhanced resources, and targeted guidance to support a unified and competitive pecan industry. Efforts included relaunching AmericanPecan.com as a central hub for data, reports, and export support, and providing ongoing insights through monthly Industry Position Reports, independent economic analysis, and dynamic data tools. Complementary marketing guidance, digital consultations, and expanded industry communications further equipped stakeholders with practical tools and insights to drive strategic growth and elevate the position of American pecans nationwide.

RESULTS:

MARKETPLACE INTELLIGENCE & QUALITY INITIATIVES

This year we relaunched AmericanPecan.com leveraging the feedback from our industry. The new and improved site offers a robust industry resources section, easy to find data reports and on demand graphs, and export support section.

- Results:¹⁰ Since launch, overall traffic increased 52%, content downloads increased 190% & organic search traffic increased by 68% (91% lift YoY)

Throughout the year, the American Pecan Council advanced several key research and compliance-focused initiatives to support a resilient and competitive pecan industry:

- Crop estimates were developed in collaboration with university extension professionals to provide reliable production insights.
- Began work on APC's first quarterly Maximum Residue Limit (MRL) and contaminant report to help industry stakeholders navigate evolving domestic and international regulatory requirements to ensure the future export markets for American pecans.
- A new resource was developed on preserving pecan freshness, all about maximizing shelf-life, flavor and consumer acceptability.

- To better understand industry needs, APC distributed a food safety questionnaire to gather anonymous feedback and guide future resources. In addition, APC initiated a European Union sampling program to support market access and regulatory compliance.

Each month, APC releases a Pecan Industry Position Report that captures reported data in categories like latest shipment, inventory, export, import and net open position. These reports can help you understand trends impacting the pecan industry and are published based on the APC's crop year (September 1-August 31), which also aligns with the pecan crop production cycle. Dynamic data graphs have also been created to give you the ability to dive deeper into the years of data that have been collected by APC.

To complement the Industry Position Report, APC has partnered with independent economist William Loux of Loux Analytics, on a new monthly report that analyzes APC handler data, USDA reports, and global trade flows to deliver unbiased, easy-to-read insights. In FY25, APC laid down the groundwork for the first report to kick off the new fiscal year in October, featuring simple charts and explanations designed to help the industry better understand shifting market dynamics.

¹⁰ Google Analytics 4: 9/15/25 - 1/4/26.

INDUSTRY RELATIONS AND READINESS THROUGH SERVICES

MARKETING GUIDANCE

As a new offering for the industry, the APC team launched a Digital Marketing Consultation service, offering strategic guidance on all things digital - from website and social to email newsletters. The guidance is customized for each business and project needs, and has serviced 12 companies to date.

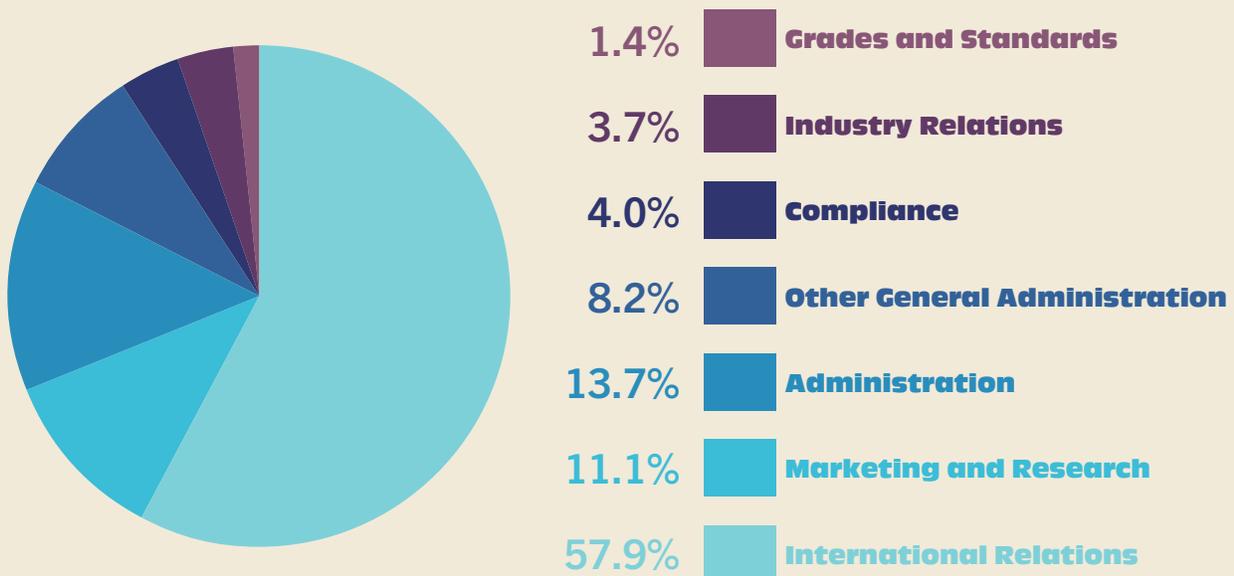
We launched @AmericanPecans on LinkedIn to keep the industry informed on the latest news and updates from the council, inclusive of new resources, webinar recordings, industry dashboard pages and more.

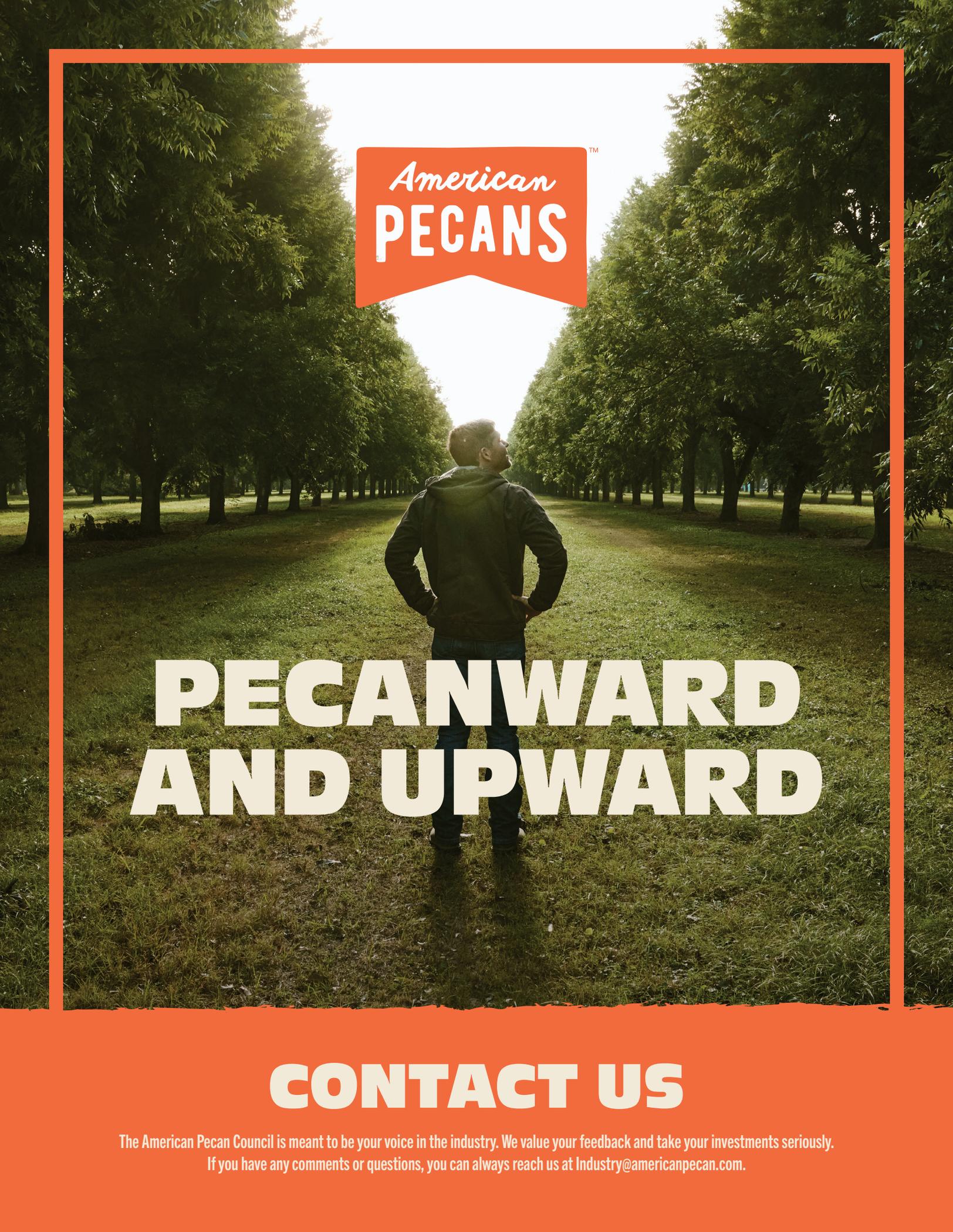
FINANCIAL REVIEW

FY 2025 FINANCIALS

REVENUES	USD
Domestic Assessments	\$2,846,833
International Grants	\$1,326,857
Interest	\$72,704
TOTAL	\$4,246,394

EXPENSES	USD
International Relations	\$ 2,281,143
Marketing and Research	\$ 438,204
Industry Relations	\$ 145,670
Administration	\$ 541,000
Other General Administration	\$ 322,180
Compliance	\$ 158,440
Grades and Standards	\$ 54,605
TOTAL	\$3,941,242





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AND UPWARD**

CONTACT US

The American Pecan Council is meant to be your voice in the industry. We value your feedback and take your investments seriously. If you have any comments or questions, you can always reach us at Industry@americanpecan.com.