



ANNUAL



REPORT

2025

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A MESSAGE FROM THE CEO



“ EVERY DOLLAR INVESTED IS FOCUSED ON BUILDING VALUE FOR PECANS AND STRENGTHENING YOUR BUSINESSES. ”

As APPB enters its fifth year, we are seeing clear returns on the industry’s investment – most notably by converting rising consumer awareness into measurable sales growth. Our strategy to expand pecan purchases beyond the holidays and into the higher-value snacking category drove year-over-year retail growth of 4.7%.¹

At the same time, our efforts to increase competition by expanding pecan usage in food service are gaining traction. Future trends are positive, with more operators (+31%)² expressing an intention to increase their pecan purchases.

We are also laying the groundwork for future demand through targeted investments in nutrition research. This year, we launched four studies examining the role of pecans in reducing chronic disease risk and supporting overall wellness and weight management. To strengthen production, we convened the industry’s leading academics to align research priorities with growers’ most critical needs.

On behalf of the Board, thank you for your confidence in APPB as demonstrated in the 2024 referendum. Every dollar invested is focused on building value for pecans and strengthening your businesses. While much work remains, the results are tangible – and they mark meaningful progress toward the industry’s full potential.

- Anne Warden, CEO

¹*Source: Circana Domestic Retail Sales Data – October 1, 2024-September 30 2025 vs. October 1 2023 – September 30, 2024

²APPB Perception and Consumption Tracking Study – July 2025

A MESSAGE FROM THE CHAIR



This year marked a period of continued progress and momentum for the American Pecan Promotion Board, as our investments translated into meaningful results for the industry.

Guided by the Unified Pecan Promotion Plan, APPB has remained focused on ensuring that every dollar invested is working hard on behalf of growers and importers. In 2025, that commitment was most evident at retail, where targeted marketing efforts and strategic partnerships contributed to measurable increases in pecan sales.

APPB continued to build a strong foundation for future growth through health and wellness research, expanded foodservice engagement, and innovative partnerships that introduce pecans to new audiences and usage occasions. Together, these efforts ensure we are driving impact today while positioning pecans for long-term, sustainable success.

Your continued investment and engagement make this work possible, and we are encouraged by the progress made as we build demand, strengthen sales, and support a profitable future for pecans.

- Deborah Walden-Ralls, APPB Chair



COUNCIL & COMMITTEES

APPB Marketing Committee: Executing impactful campaigns and commercial partnerships to drive demand in U.S. and Mexico, and sharing consumer insights with industry

APPB Research Committee: Aggregating and interpreting research for updated claims and messaging opportunities

APPB Finance Committee: Ensuring fiscally responsible programming, organizational growth and industry compliance.

Deborah Walden-Ralls

Executive Committee Chair
Western Producer

Larry Don Womack

Marketing Committee Chair
Central Producer

Brycen Salopek

Research Committee Chair
Secretary, Western Producer

Trent Mason

Vice Chair, Eastern Producer

Greg Leger

Eastern Producer

Justin Jones

Eastern Producer

Jake Montz

Central Producer

Shannon Ivey

Central Producer

Phillip Arnold

Western Producer

Larry Salopek

Western Producer

Evo Soria

Importer

Ana Lucia Sanchez

Importer

Romulo Garza

Importer

Mark Hamilton

Importer

Steve Zaffarano

Importer

Sally Arn

Importer

Jeff Worn

Importer

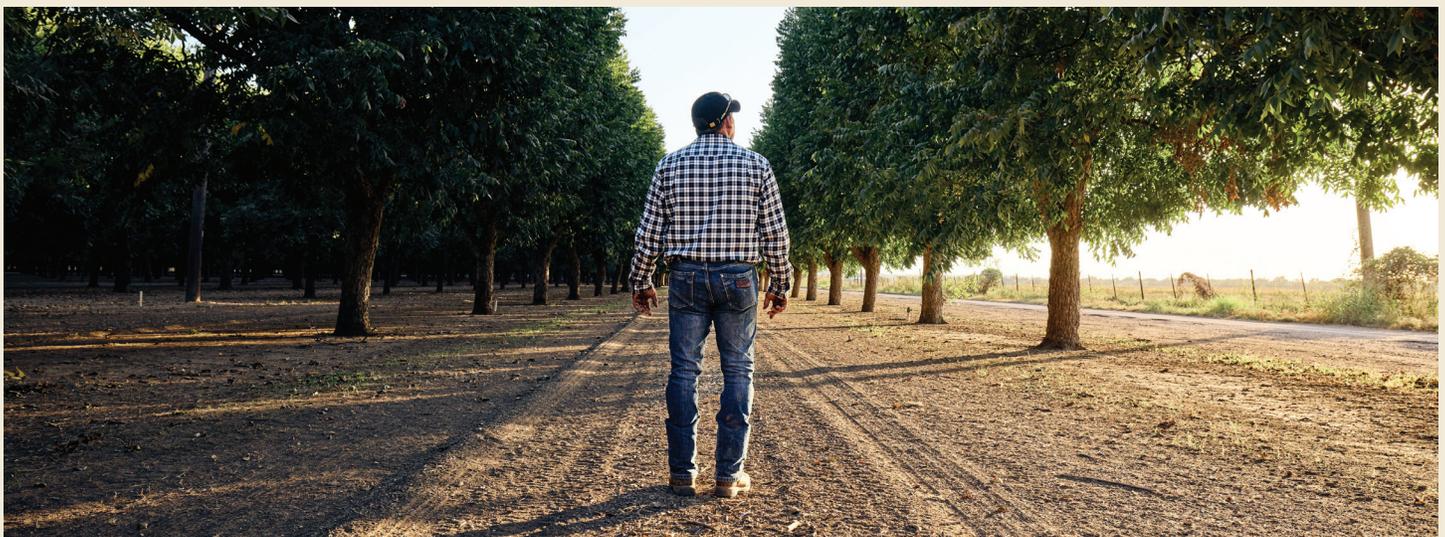


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2025 HIGHLIGHTS AT A GLANCE

5.9% increase in pecans sales dollars in the snacking category compared to last year³

New EatPecans.com website launched to be resource-forward and user-friendly

Hosted first-ever APPB Pecan Research Symposium with 60+ science stakeholders

Extended Surprisingly Snackable Pecans campaign to feature engaging creative advertising in new channels

Activated 13 retail partnerships across 7K+ store locations, with a focus on sampling initiatives to drive sales; sustained an average weighted sales lift of 66%⁴

Six studies on pecan health benefits on track and results of a published study from Penn State heart health study received 3.5B media impressions

Webinar for our Pecan Powerhouse Network was attended by more than 100 health practitioner attendees

Partnered with restaurant chains like Dave & Busters and Perkins Family Restaurants to add more pecans to the menu through innovative recipes

Consumption is up in Mexico and El Poder de la Nuez extended retail efforts to include in-store sampling

³**Source: Circana Domestic Retail Sales Data – October 1, 2024-September 30 2025 vs. October 1 2023 – September 30, 2024

⁴First party data from 13 retail partners across FY25 (Oct 2024 through Sept 2025)

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. APPB's goal aimed to increase consumer perceptions of pecans as a nutritious and essential part of the diet to maintain demand.

STRATEGY:

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

KEY PROGRAM ACTIVATIONS:

Health Professional Outreach, Content Development, Media & Event Sponsorships



ACTIVATION OVERVIEW:

APPB continued to invest in nutrition research and health professional engagement to build understanding of the role pecans may play in overall health and dietary patterns. Peer-reviewed findings published in leading journals and shared by top-tier media outlets raised awareness of pecans' nutritional benefits, while strong year-over-year growth in research proposals underscored rising scientific interest in the health benefits of pecans. New human health studies and literature reviews delivered key findings in heart health and satiety while ongoing analyses will continue to build evidence to make new wellness claims. Relationships with health practitioners reinforced confidence in pecans and extended science-backed messaging to their patients and general consumer audience.

RESULTS:

NUTRITION RESEARCH

- Results of the Penn State study finding pecans may help lower cholesterol were published in American Journal of Clinical Nutrition and 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.
- 33 new research proposals were submitted, a strong increase in RFP submissions YoY.
- Four new human health & nutrition studies were put into motion in FY25 with top-tier research institutions, investigating the impact of pecans on gut health, skin, and dose response.
- Additionally, a new pecan literature review was published in *Nutrients*⁵, which shared key findings including:
 - Pecans contain rich sources of polyphenols (a type of antioxidant) and other bioactive components. This could be important as we look at the benefits of antioxidants on the body when it comes to health issues like inflammation.
 - Cholesterol levels seemed to be the most positively impacted health marker when eating pecans. Good cholesterol levels are essential to overall heart health.
 - Findings on pecans effect on blood sugar/diabetes are mixed, so more research needs to be conducted in that area to show a clear and positive tie to pecans, metabolic syndrome, pre-diabetes and diabetes.
 - Findings on weight are also mixed; however, some measures did show a positive impact on satiety. This is a promising area of research, particularly as consumers are looking for foods that keep them full and can help them manage weight.
- Lastly, analysis of one of largest databases maintained by USDA and the National Institutes of Health found people of all ages benefit from eating pecans, including lower triglycerides (important for heart health) and satiety (important for weight management). The manuscript is being submitted for publication in 2026.

HEALTH PRACTITIONER & MEDIA OUTREACH

- **NUU Panel & Webinar:**
APPB sponsored a panel at this year's Nutrition News Update conference featuring Dr. Sabrina A. Falquier (triple board certified in internal medicine, culinary medicine, and lifestyle medicine). The presentation was shared in a follow up webinar with the Pecan Powerhouse Network which had over 100 attendees.
- **Resources:**
Six new resources were developed and distributed to our HP network, including new fact sheets on dietary patterns and snack pairings, a nutritional nut comparison guide, a retail RD toolkit and more.
- **Health Professional Perception Tracking:**
Following up on last year's benchmarking survey, we found 80% of HPs recommend pecans to their patients (+3% YoY).⁶ Findings also included that three out of four dietitians believe pecans are a good option for seniors, athletes and teens.
- **Televised Nutrition Segments:**
APPB partnered with prominent media RDs on four TV segments in markets across New York and Miami which reached 85K+ viewers.

⁵Nutrients 2025, 17(23), 3686; <https://doi.org/10.3390/nu17233686>

⁶APPB Perception and Consumption Tracking Study – July 2025

EXPANDED DEMAND THROUGH NEW OCCASIONS

BACKGROUND:

Consumers report very high interest in buying pecans, but consumption overall (particularly in non-holiday time periods) is not rising to match this interest. As a result, pecan farmgate prices are often dictated by prices set at one point of the year verses being more reactive to total annual demand. Our goal is to provide consumers with more and easier retail purchase opportunities – especially outside of holidays – tied to new usage occasions (snacking, cooking ingredients, healthy recipes).

STRATEGY:

Increase purchase frequency and usage occasions of pecans throughout the year

PROGRAM AREAS:

Awareness campaigns, Retail activations, Food Service & CPG



ACTIVATION OVERVIEW:

Showing up in places consumers are already shopping and dining, in retail, e-commerce, and foodservice drove trial, purchase, and relevance for pecans across multiple touchpoints. A redesigned website and new advertising fueled significant gains in traffic, discovery, and social engagement. In retail, expanded national partnerships and in-store experiences including sampling programs generated measurable sales lifts and snack category growth, while digital partnerships delivered improved return on ad spend. APPB continued to build foodservice engagement through operator outreach and collaboration and training materials, positioning foodservice as a gateway for pecan trial, menu innovation, and new product formats.

RESULTS: AWARENESS CAMPAIGNS

- The new and improved EatPecans.com put the user experience first, resulting in 3x the traffic post-launch, a 350% increase in visitors from organic search and 280% increase in organic social traffic⁷.
- Launched four new creative video spots which had campaign extensions in our web, social, influencer, print and e-commerce landscape.
- 145 influencer posts generated 4M+ video views on content ranging from pecan-focused recipes and snack hacks to family-friendly comedic videos, generating a 5.6% average engagement rate - double the industry average⁸.

RETAIL & E-COMMERCE ACTIVATIONS

- Expanded partnerships to include high-end grocery and warehouse chains, covering 100% of U.S.
- Activated 13 retail partnerships across 7K+ retail locations which included in-store sampling events, signage, shelf blades and off-site media - resulting in an average weighted sales lift of 66%, while sampling specific events experienced a 250% sales lift⁹.
- An in-store takeover with Kroger put pecans top of mind for shoppers in unexpected places.
- Inspired by the new Never Grocery Shop Hungry creative spot, we launched sampling tailgate events in parking lots of 16 grocery stores which generated 57% average unit sales lift and a 17% category lift¹⁰.
- The Surprisingly Snackable strategy has proven effective, with pecans experiencing a 5.9% growth in sales dollars in the snacking category. In fact, when measuring both pecan sales (dollars) and volume sales (in pounds) against the same measures in the total nuts category, pecans are overperforming the total nut category, showing stronger percentage change across snacking, cooking & baking and total category numbers.¹¹
- On the digital side, we launched 8 partnerships, with every channel showing significant improvements in Return on Ad Spend (ROAs) - averaging \$9-11 for every \$1 spent
- New buyer volume increased to 30% - a 9% increase YoY

RETAIL CATEGORY GROWTH*

PECANS ONLY: FY25 (October 1, 2024 - Sept 30 2025)

Measure	Sales Dollars	Sales % Change	Volume lbs	Volume % Change
Total Category	\$723,087,792	4.7%	78,487,603	-0.5%
Snacking	\$102,090,085	5.9%	8,354,880	-0.6%
Cooking & Baking	\$620,997,708	4.5%	70,132,723	-0.5%

ALL NUTS: FY25 (October 1, 2024 - Sept 30 2025)

Measure	Sales Dollars	Sales % Change	Volume lbs	Volume % Change
Total Category	\$7,495,866,020	2.4%	1,201,196,373	-3.0%
Snacking	\$6,059,394,706	1.2%	1,018,524,315	-3.0%
Cooking & Baking	\$1,436,471,314	7.9%	182,672,058	-2.9%

*Domestic Data from Circana, % changes based on YOY (Oct 1, 2023-Sept 30 2024 vs Oct 1, 2024-Sept 30, 2025).

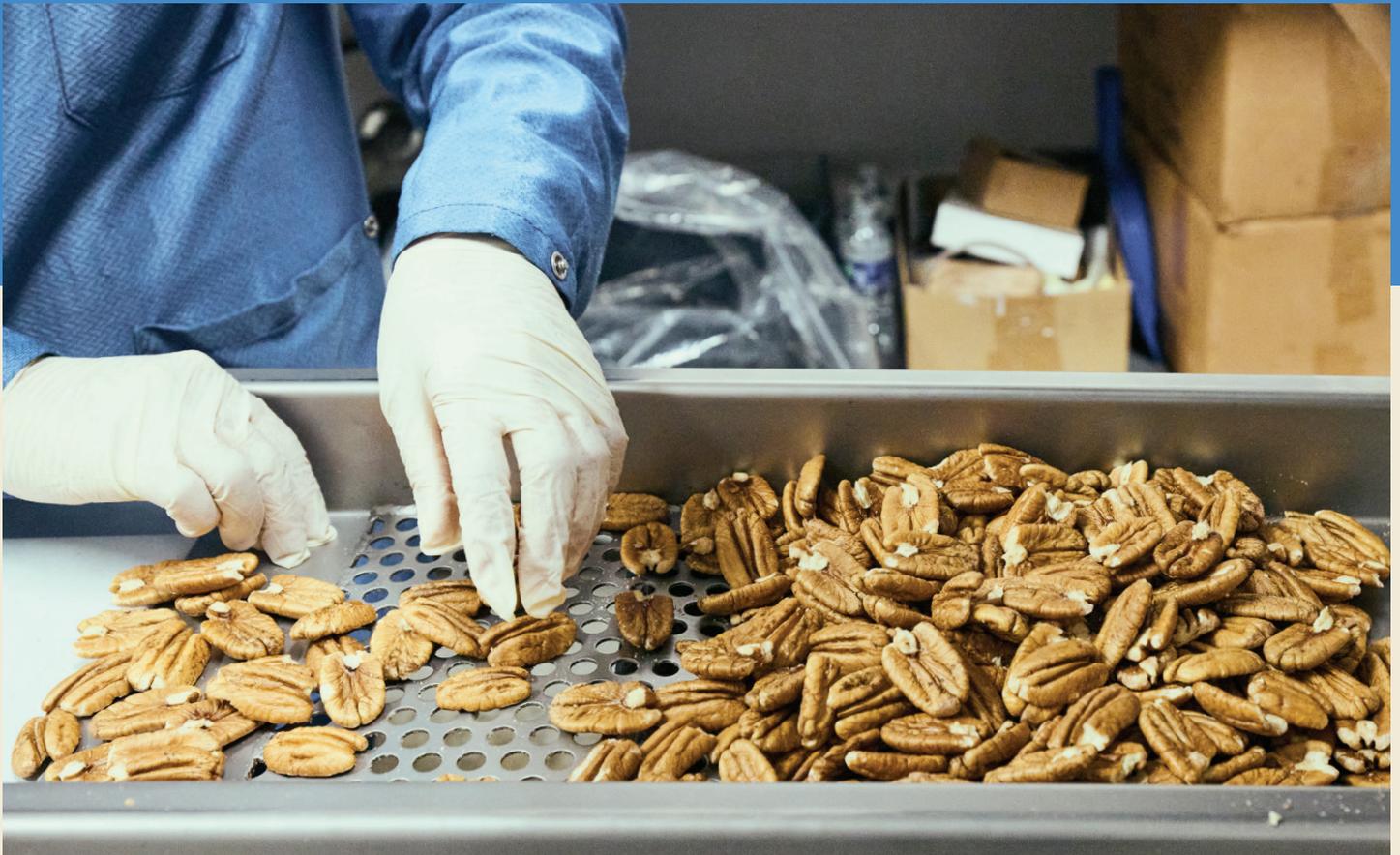
⁷Google Analytics 4 (6/24/25 -1/4/26 vs. 12/1/24 - 6/8/25; Site launched on 6/11)
⁸Aspire IQ data - October 2024 - Sept 2025

⁹First party data from 13 retail partners
¹⁰Proprietary data from ShopRite, Stop & Shop, Raleys, 2025

RESULTS:

FOOD SERVICE

- Continued conversations with targeted food service operators and restaurant chains on menu innovation partnerships including Culver's, Perkins, Dave & Busters, and more. We've now completed two tastings with more being scheduled this year.
- Chef Advisory Panel (with experts from large chains like Dave & Busters, City BBQ, and operating group Compass) joined us for an orchard tour and culinary experience at San Antonio's CIA campus to further immerse the group into world of pecans.
- Developed industry foodservice materials and kicked off our Food Service Bootcamp trainings at the NPSA annual meeting, with more sessions to be rolled out this year.
- Included operators in our Summer '25 Perception and Consumption study. The results trended positive with more operators expressing intention to increase pecan purchases vs. decrease (+13%), with room to grow (49% believe pecans are appealing to their customers¹³).
- Foodservice will be a gateway to trial alternate pecan formats (butter, syrup, oil, flour, milk), and we are already working on product development and innovation in the space with pecan-encrusted proteins as a result of our FY25 Spark Fund initiatives.
- Snickers Pecan continued to have strong momentum as a top new Mars flavor in 2025. APPB partnered with Mars to launch the chocolate bar in retail over the holiday period.



EL PODER DE LA NUEZ

STRATEGY:

Drive demand for pecans within Mexico through marketing efforts online and in-store through education on the 'power of pecans' and recipe inspiration.

ACTIVATION OVERVIEW:

Mexico's marketing efforts have focused on activating *El Poder de la Nuez* both in-store and online. Expanded in-store promotions with key retailers, including a broadened sampling program with Soriana, drove year-over-year sales growth while nationwide retail coverage ensured broad consumer access. These efforts were complimented by a robust media plan that included organic social, paid media, and website activity that delivered significant video views, audience reach, and ongoing engagement, alongside broadcast television and radio exposure that further extended visibility across traditional and digital channels.

RESULTS:

- 300+ in-store promotions with Soriana and HEB. Expanded our partnership with Soriana to include 80 in-store sampling activations. Pecan sales in Soriana locations increased 22% YoY in 2025, while the locations that participated in sampling efforts reported sales lifts of 61%¹⁴
- 2025 retail partnership with Soriana across 250 locations cover over 90% of Mexico.
- Mexico continues to develop high-impact content across social & paid media and the website, driving audience engagement: 170M social video views, 76K average monthly website traffic & 30M+ estimated reach for media efforts¹⁵.
- Secured on-air television mentions and interviews as well as radio spots and segments that streamed on YouTube via multicast.



¹⁴Sales data from Soriana via Plexiz Media from sales period August 24 – September 14, 2025 comparing weekday sales to the weekend activation lifts

¹⁵Plexiz Media 2025

INDUSTRY 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 precompetitive marketing resources for the full industry to help drive informed business decisions and impactful marketing campaigns.

STRATEGY:

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

PROGRAM AREAS:

Research and Insights, Marketing Resources, Trade Outreach and Promotion



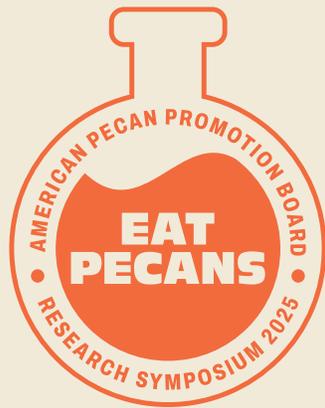
ACTIVATION OVERVIEW:

This year's focus on research, insights, and industry engagement supported information sharing and visibility across the pecan industry. Activities spanned a first of its kind Pecan Research Symposium, audience and marketplace insights, regular communications, and trade-facing marketing efforts designed to keep stakeholders informed and connected. Collectively, these efforts provided a foundation for dialogue, awareness, and coordination across the industry.

RESULTS:

RESEARCH & INSIGHTS

- APPB hosted our first ever Research Symposium that drew 60+ growers and researchers to share recent study results and foster more cross-collaboration efforts among pecan producing states.
- Our 2025 Perception and Consumption study provided the industry with new insights across consumer, health profession and food operator audiences.



MARKETPLACE INTELLIGENCE & MARKETING GUIDANCE

- We've kept the industry in the loop on updates across both organizations through our Pecan Pulse monthly emails quarterly industry meetings.
- Hosted five webinars providing information and resources on topics including APPB marketing campaigns, new website walkthroughs, future forward planning and information 101 sessions on social media and retail marketing.

- 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.
- As a new offering for the industry, we 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 it has serviced 12 companies to date.

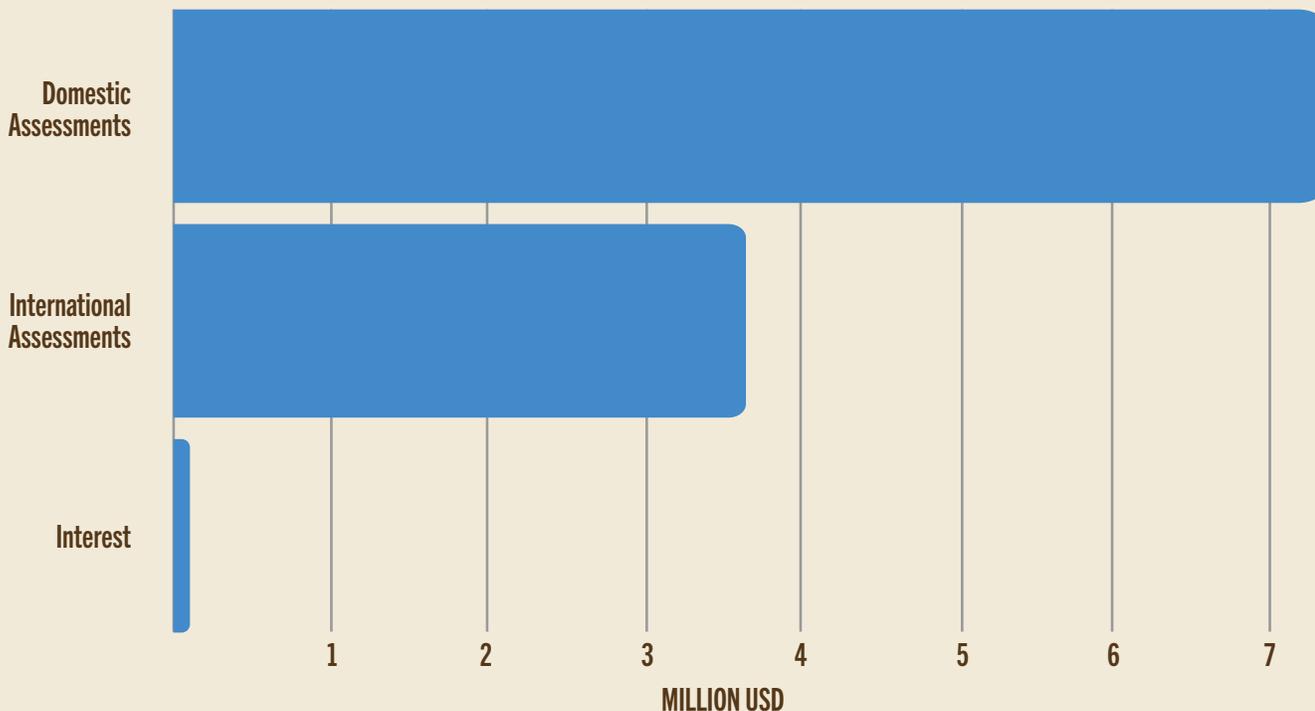
TRADE MARKETING

- On behalf of our organizations, we secured media placements in trade publications such as National Nut Grower, Pecan South, Pacific Nut Producer, West Coast Nut, Ag Alert & more. Placements included sponsored columns, print ad and web and email banners, driving to EatPecans.com.
- Billboards were placed across eight growing states to drive local awareness and encourage consumption with "Buy Local Pecans" messaging.
- Won 15 creative advertising awards from trade organizations including NAMA (National Agri-Marketing Association), AMIN Worldwide, AAF & more.

FINANCIAL REVIEW

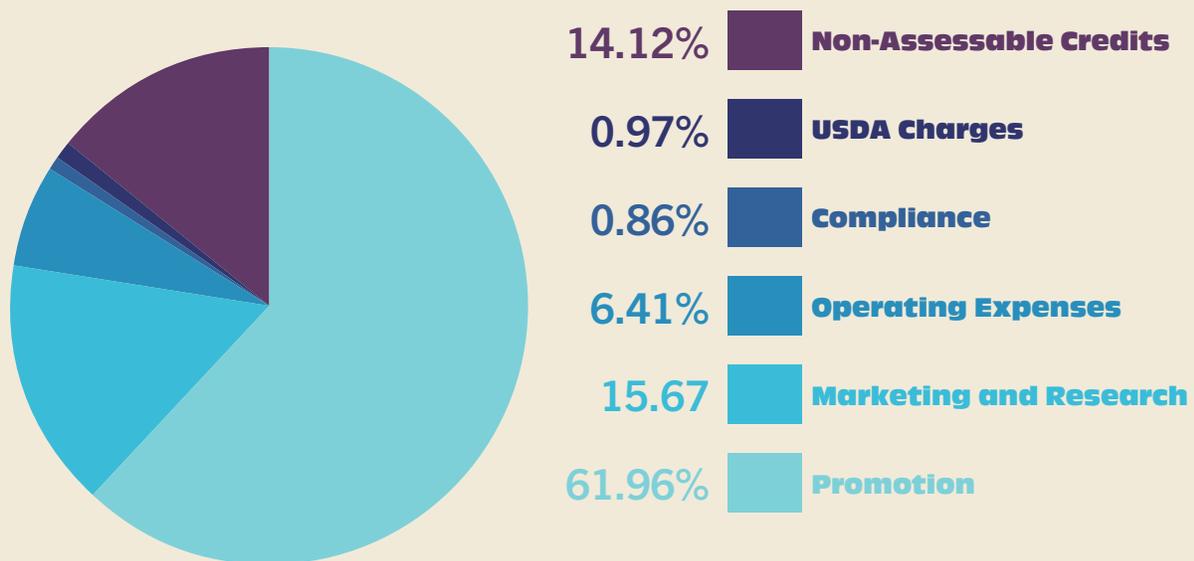


REVENUES	USD
Domestic Assessments	\$ 7,201,599
International Assessments	\$ 3,648,697
Refunds for Non-Assessable Pecans	(948,056)
Interest	\$ 180,102
TOTAL	\$10,082,342



FINANCIAL REVIEW, CONT.

EXPENSES	USD
Promotion	\$ 8,203,519
Marketing and Research	\$ 2,074,533
Compliance	\$ 113,563
Operating Expenses	\$ 849,330
USDA Charges	\$ 128,642
SUBTOTAL	\$ 11,369,587
Non-Assessable Credits	\$ 1,869,625
TOTAL	\$13,239,212





PECANWARD AND UPWARD

CONTACT US

The American Pecan Promotion Board is your voice in the industry and among consumers. We value your feedback and take your investments seriously. If you have any comments or questions, you can always reach us at Industry@eatpecans.com.

