

# Characterizing the North American Truffle Market

## Structure and Supply Chain

### Research Overview and Plans

#### AUTHORS

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#### What we know

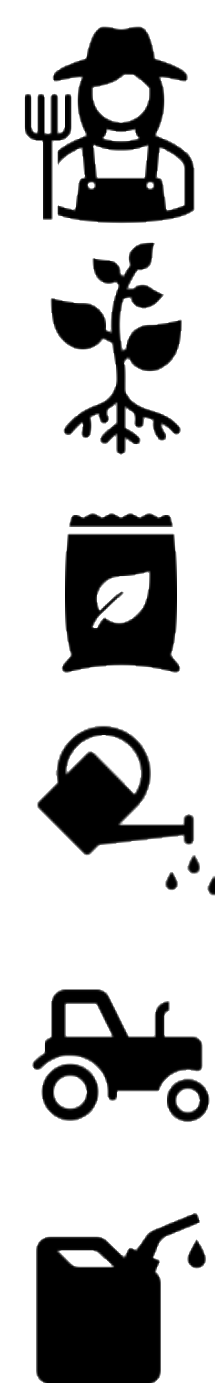
We have learned a great deal of information about the status of truffle production in North America (NA) from the NA Truffle Growers' Association (NATGA) supported survey by Allen et al. (2023). From this survey, we have a much-improved understanding of:

- Where in NA truffles are currently grown;
- The current maturity of NA truffle orchards;
- The types of truffles grown;
- The types of tree species used in production;
- Typical production practices utilized;
- Production issues faced; and,
- Marketing methods.

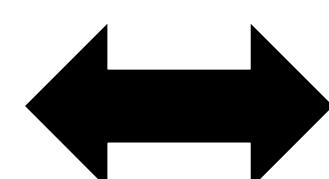
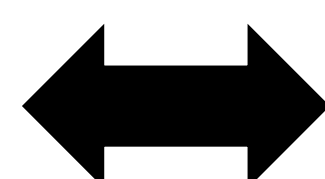
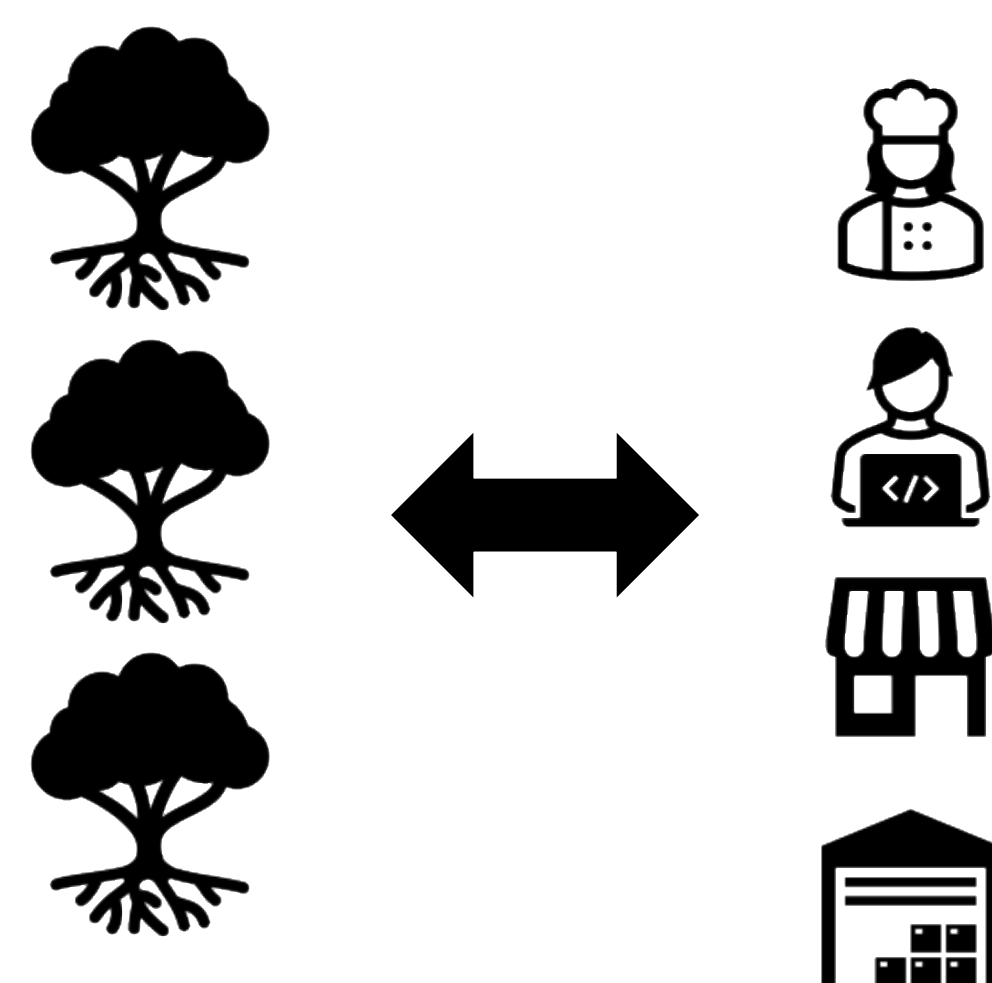
These survey data are supplemented by the recent publication by Coleman et al. (2024), which provides a thorough description of the status of scientific understanding of the factors that influence NA truffle orchard productivity.

Based on the information in Allen et al. (2023) and Coleman et al. (2024), we can infer the structure of a network of participants in the NA truffle market as shown in the figure.

#### Input providers



#### Buyers



In summary, thanks to support from NATGA for these studies, we now know much more regarding who is a participant in the NA truffle industry.

#### What we do not know (yet)

While much has been learned over the past few years, there are several aspects of the truffle industry that could be explored more, especially regarding differences in market position for truffle orchards in different regions and/or sizes and how currently sparse price information could be improved.

#### Marketing and management differences across regions and/or orchard sizes

Determining if and how marketing strategies vary across regions and orchards of different sizes can help existing orchards and prospective orchards with business planning. For example, if differences across regions are found, then there may be opportunity for local market development. If they are found for orchards of different sizes, then that can help inform plans for scaling up and/or increasing productivity.

Other regionally related information such as the proximity of a major buyer would help better inform the market “scopes” for different regions and orchard sizes.

#### Market information

The best/most widely available information on truffle prices are trade import data. However, it is commonly mentioned that there is a “domestic premium”. If more information on a domestic premium could be obtained, then trade data could be used to inform price expectations and guide business planning and decisions.

#### A complementary survey

To complement the efforts by Allen et al. (2023) and answer the key questions discussed earlier, we have designed a brief survey that asks questions related to marketing, management, and market information. The survey is targeted to producers and other stakeholders in the truffle industry.

Note: There are a few similar questions in this survey and that disseminated by Allen et al. (2023). However, it is necessary to combine the “characteristics” questions that are duplicative with other questions to be able to categorize the survey results based on region and/or orchard size.

Your responses will greatly advance the understanding of the NA truffle market and efforts to obtain increased research funding under our grant proposal titled “Truffle Research and Production Initiative – TRAPI” to the USDA Specialty Crop Research Initiative.

Please use the QR code to fill out the survey!



#### Additional plans

As part of TRAPI, further truffle orchard business research plans include:

- Expanded market structure and supply chain analysis;
- Business benchmarking analyses; and,
- Expanded cost of production analyses.

#### References

Allen, B., S. Berch, P. Oviatt, G. Bonito, S. O'Toole, P. Long, and S. Oneto. 2023. North American Truffle Growers Association. 2022 Survey Results. Data by Growers for Growers.

Coleman, M.D., S. Berch, G. Bonito, B. Allen, E. Andrews, E.T. Arechiga Carvajal, S.P. Cook, C. D'Amours, R. Garibay-Orijel, G. Guevara, P. Hatzenbuehler, B. Hawkins, R. Heinse, G. Kernaghan, C. Lefevre, B. Lemmond, I.M. Meadows, S. Oneto, J. Sharma, D.G. Strawn, J.B. Tanney, A. Türkoğlu, J. Uehling, J. Winfree, and M.E. Smith. Status of truffle science and cultivation in North America. *Plant and Soil*, published online 12 July 2024.

#### Interested in helping?

- Let us know what we are missing regarding industry participants, especially other “intermediary” entities.
- Please fill out the survey (and others)!