



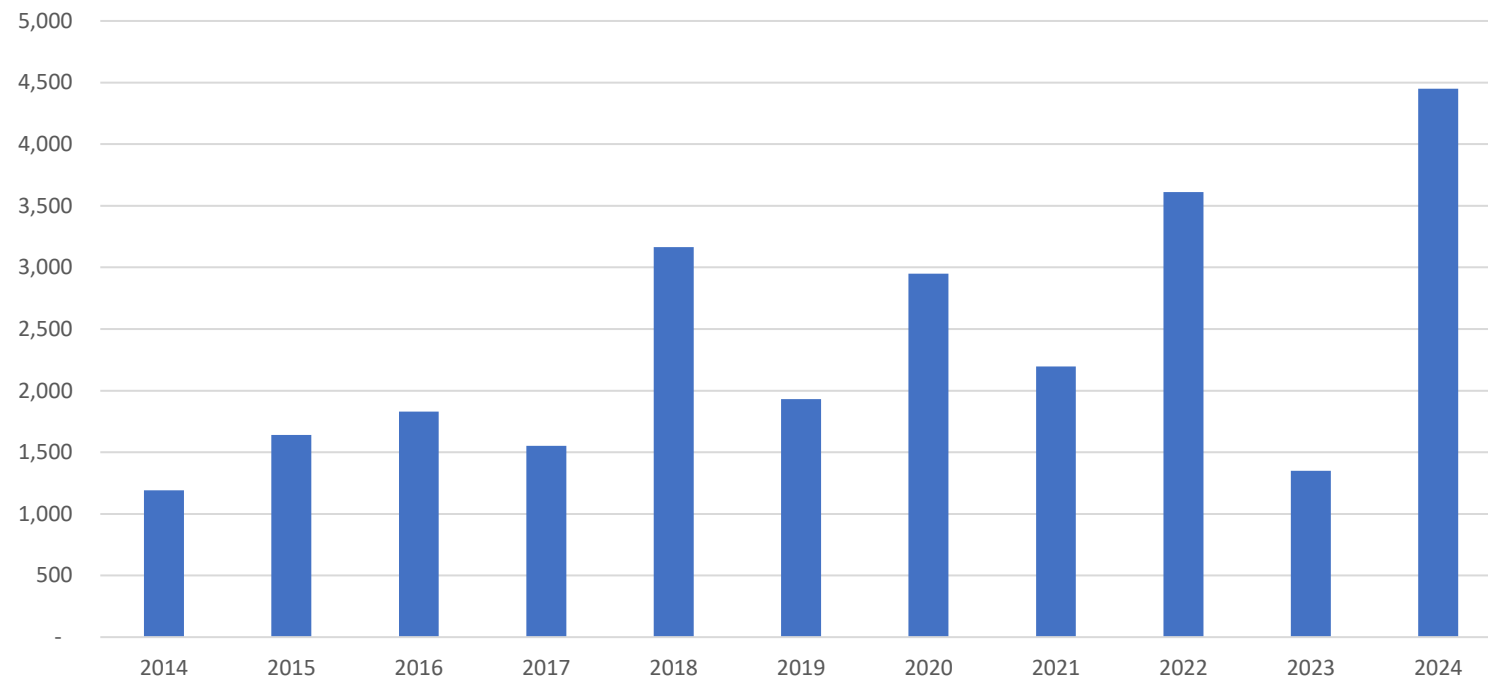
2024 Harvest



- Record crop – more pistachios to come
- Insect damage – first occurrence of serious damage in Australia
- Aflatoxin – worst season for a decade
- Nut size – the smallest nuts ever
- Successful season with both the new and the old hulling plants

2024 – Record Australian pistachio harvest

Australian pistachio crop
tonnes, actual to 2024,

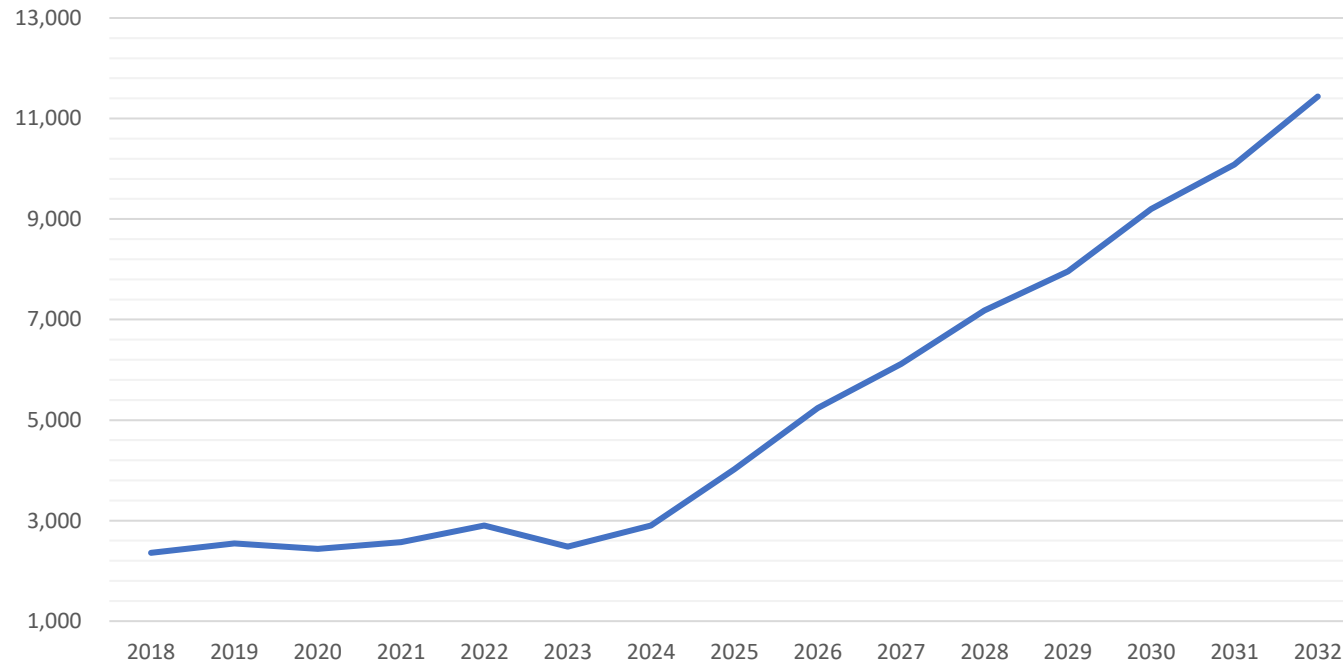


More Pistachios to come

3,000ha planted, only 1,250ha bearing

500ha planted in 2023, similar area to be planted in 2024

Australian Pistachio Production,
tonnes, 2 year moving average
2018-2024 actual, 2025-2032 estimate



Insect Damage 2024

- 2024 is the first time insect damage has been detected in Australian pistachios
- Widespread across Sunraysia and Riverland, whilst centred around Robinvale.
- Damage is sever. Insect eaten nuts will be difficult to remove and probably will cause consumer complaints.
- 25% of all Lots received showed some damage
- Nuts from 50% of growers showed some damage
- Damage ranged from the very low (below 0.2%) to 5% of all nuts in the Lot to a single Lot which had 9% of the nuts eaten.
- APPC trying to identify sorting techniques to remove – difficult as shell conceals the damage until the consumer opens the nut.

Insect Damage 2024



Insect Damage 2024



Insect Damage 2024 Progress

Caterpillars have been developed into pupae, hatched and identified as

- **Helicoverpa punctigera** – native bud worm.
- **Helicoverpa armigera** – cotton bollworm.

A working group has been formed to develop recommended management strategies

Brenda Kranz
Maha Mahadevan
Rachel Lee, Swan Hill Chemicals
Narendra Kadiyala, Kyalite Pistachios
Rajesh Nomula, CMV Farms
David Loxley – Bugs for Bugs



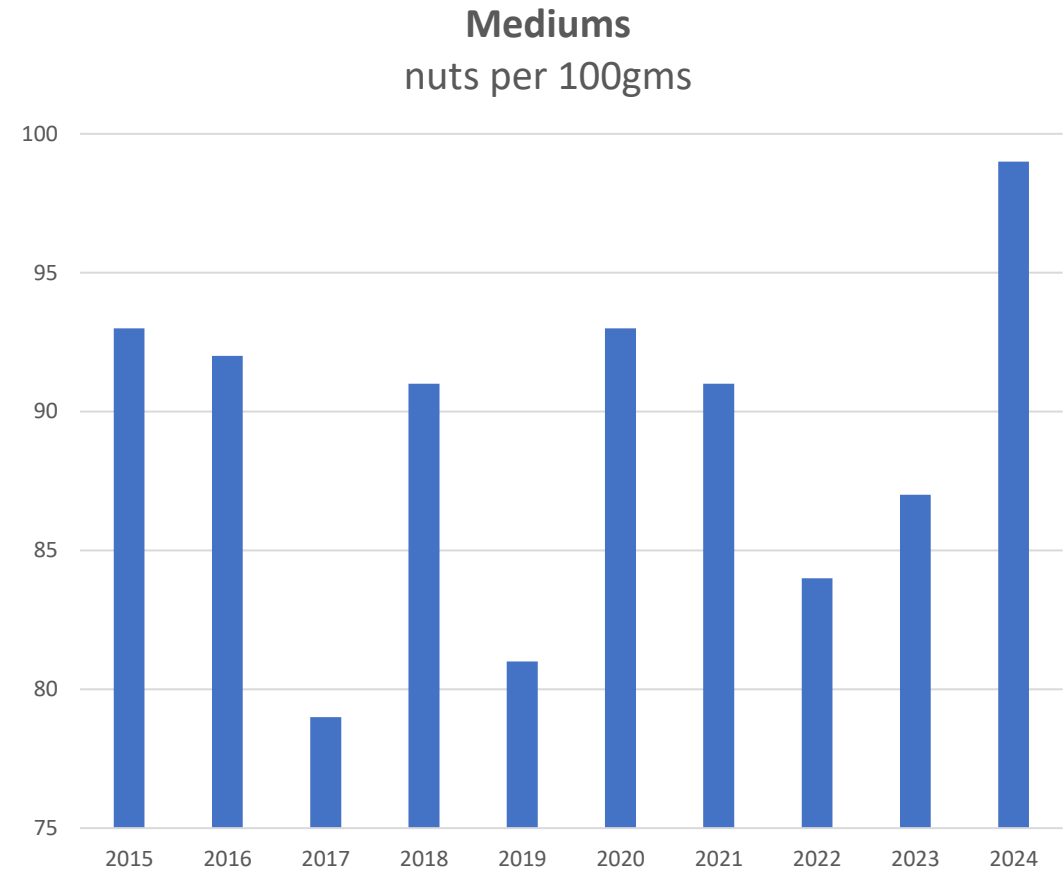
Recommendations to be made to growers before June

Aflatoxin 2024

- Worst season for aflatoxin detections since 2014.
- Growers in Sunraysia and Riverland affected.
- APPC confident that no positive loads will enter the domestic market.
- Unlikely to have any economic impact on impacted growers, this is not always the economic outcome. In 2014 the aflatoxin nuts achieved 30% less than unaffected crops.
- Occurred on both AF36 treated and non-AF36 treated orchards
- AF36 builds in the orchard, optimal resistance is achieved from the 3rd season.
- The HOT and DRY conditions since January through harvest are the optimal conditions for the aspergillus fungus that produces aflatoxin.

2024 – the smallest nuts ever

- Almost all growers produced nuts of small size across all growing areas. Only one grower produced nuts of 90 count.
- Supermarket specification is 90 nuts/100gms. With blending, APPC can usually comply. Not in 2024.
- Nut size not particularly related to crop load. Big nuts came from then record 2022 crop.



New APPC Huller



August 2022



February 2024

New APPC Huller



- Commenced operation in time for 2024 harvest.
- Plant ran well. Together with the old plant the extra capacity handled a record crop whilst growers delivered as they harvested without delays.
- Costs over budget
 - Green Field site infrastructure, roads, power, plumbing, approvals
 - Post pandemic labour shortages and raw material inflation particularly steel.
- Required an increase in hulling fees. Expected that will be no further increase in real hulling fees.



2024 APPC Pool

- International prices dropped sharply in October 2023 with the record Californian crop of 1.5 billion lbs compared with 1.0 b lbs in 2022
- Californian offer prices have firmed this year on strong shipments to March 2024. Presently no business as buyers have cheap current stock.
- APPC completing silo validations and concluding sales contracts
- APPC will send to all growers in the middle of May the final grade outturns and an estimate for the 2024 Pool returns
- A preliminary estimate for the 2024 net Pool returns – a little lower than the net returns from the 2023 crop.

The future continues green.
Long term prices likely to soften with increased global production. Strong, dominate Californian seller has prevented collapse of grower prices unlike almonds, walnuts and macadamias.



Pistachio Growers' Association

