



Pistachio Growers' Association

2025 Crop Harvest Review

Chris Joyce, June 2025



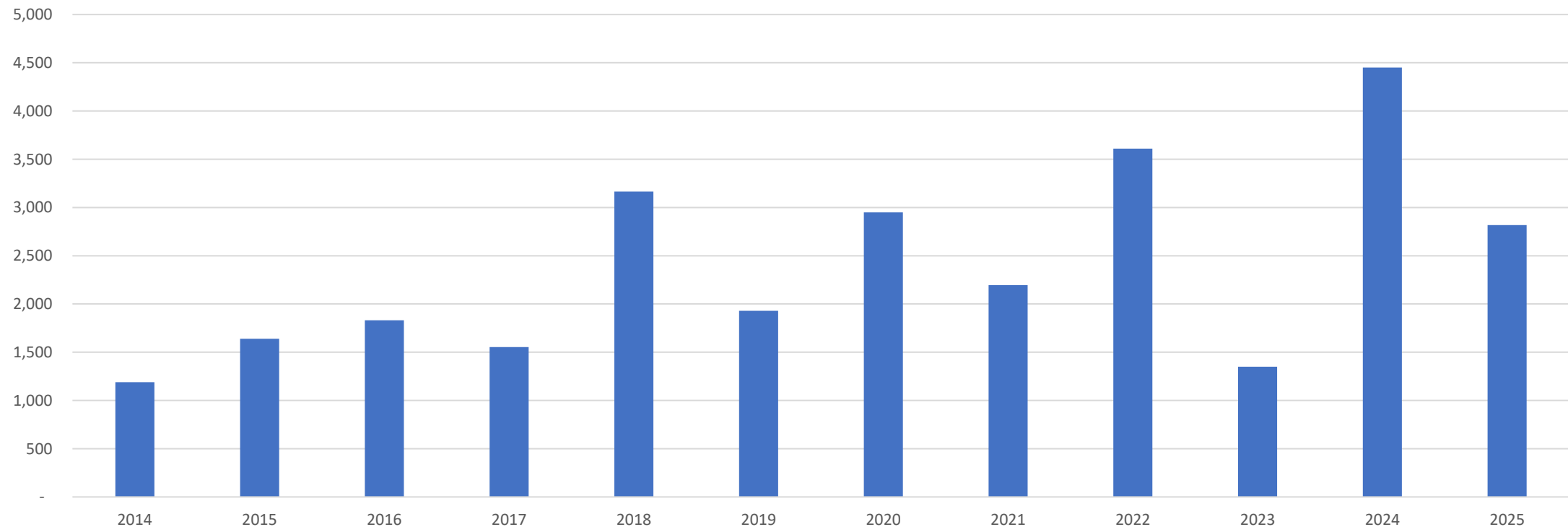
2025 Harvest



- Good Off crop
 - Mature trees, normal off yields, unlike disaster of 2023
 - Young trees ranged from excellent to disappointing
- Insect damage – Carpophilus emerged as a serious pest for pistachio
- Nut size – one of the largest nut sizes ever.
- Successful season with both the new and the old hulling plants

2025 – Good off-crop with increasing tonnes from the new orchards

APPC crop 2014 to 2025, tonnes



Insect Damage 2025

- The *Helicoverpa* that did the damage in 2024 was almost invisible in 2025. It remains a serious threat and orchard monitoring needs to continue and action taken if it reappears in the future. There is no post harvest technology has been found to remove Helicoverpa damage – it can only be controlled in the orchard
- *Carpophilus truncatus* appeared in 2025 causing significant damage in pistachios for the first time. This pest causes up to tens of millions of dollars to the Australian almond industry annually. It is very difficult to control in the orchard. Damage was widespread across Sunraysia and the Riverland. 50% of all Lots showed some damage from the orchard. The worst Lot had 16% of the nuts eaten.
- No further damage has been detected in the grading since harvest. We think that the hulling and drying has prevented further damage but reseach needed to prove this
- The PGA is working with the Victoria Department of Agriculture to better understand Carpophilus in pistachios and its control.
- **Light Brown Apple Moth** was also detected causing some limited damage
- Dr Samatha Edley of Victoria Agriculture and Dr Shaoib Shar will present more.

Insect Damage 2025

Carpophilus truncatus





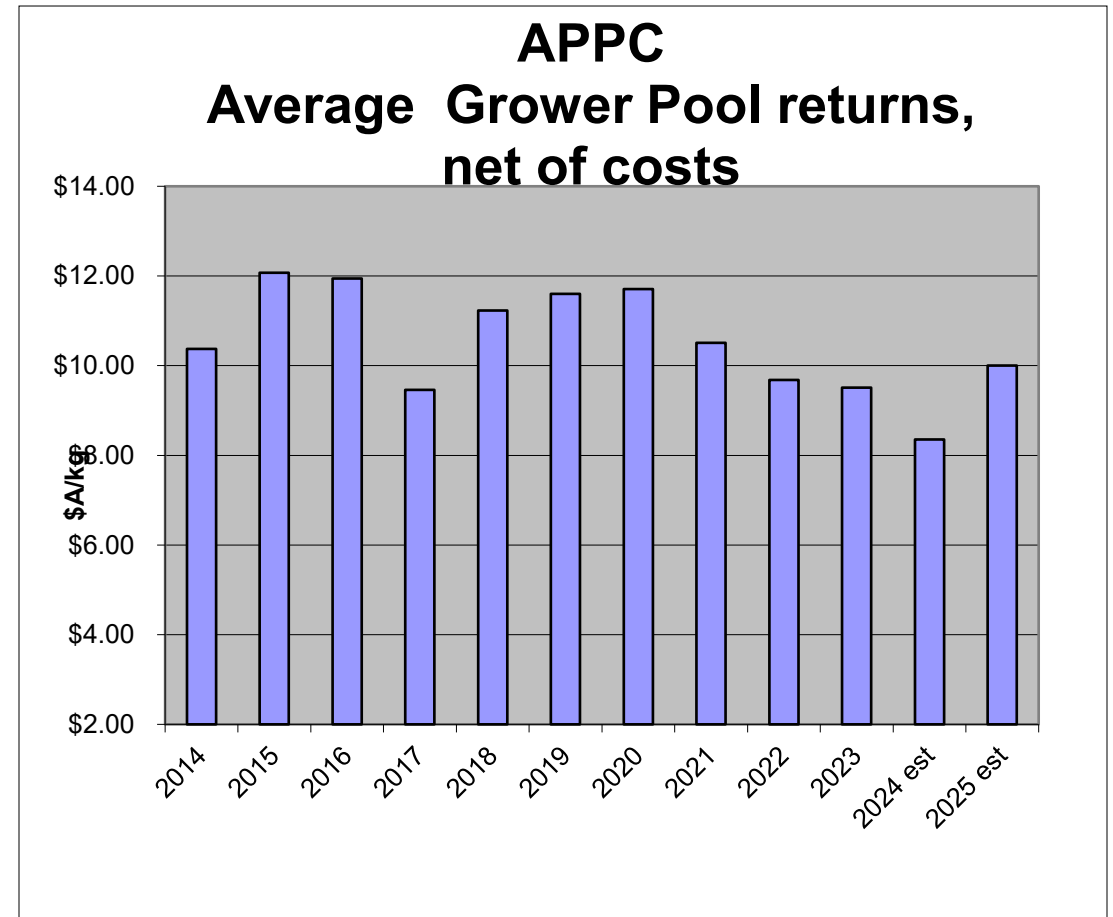
Market Update

- International prices increased October 2024 with the more modest Californian off crop of 1.1 billion lbs compared with 1.5 b lbs in 2023
- The demand for Dubia Chocolate has pushed kernel prices up 30% in the last few months. Natural in shell spilt prices has remained steady despite the Trump tariff chaos. For 2025 crop, kernels are only about 15% of the Australian output.
- A record crop from California in September 2025 is expected (1.6blbs) to put some downward pressures on international prices.
- Australian 2025 inshell will be all contract by Ca harvest so no impact on 2025 Pool, but, could be on 2026 Pool
- China consumes about 10% of world pistachio production, mostly from the USA. Over the last three months the Chinese tariffs on Californian pistachios have been 25%, 50%, 145%, 45%. Chinese buyers are confused.



2025 APPC Pool

- APPC sent to all growers last week the final grade outturns after adjusting the estimates from the samples taken on intake with the actual out turns from the silos.
- 2025 Pool returns are expected to return to 2023 levels, about 15%, >\$1/kg above 2024.



APPC Hulling



- Both plants ran well. New plant ironed out the bugs from its first season in 2024.
- Growers delivered according to their preferred harvest schedule. No delays.
- Hulling and grading fees maintained in real terms.
- Plant expanded by 50% for 2025 whilst not needed until 2026 to ensure 2026 runs smoothly.
- Additional silos being added to store the large 2026 crop

The future continues green.
Long term prices likely to soften with
increased global production. Strong,
dominate, Californian seller continues to
provide a solid floor for world pistachio prices



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