

A decorative collage of various tree nut images arranged in circular frames of different sizes. The images include: a cluster of pinkish-red hazelnuts with green leaves; a cluster of green almonds; a cluster of green walnuts; a cluster of green pecans; a cluster of green chestnuts; a cluster of green acorns; a cluster of green pine nuts; a cluster of green macadamia nuts; a cluster of green Brazil nuts; a cluster of green cashews; a cluster of green pistachios; a cluster of green almonds; a cluster of green walnuts; a cluster of green pecans; a cluster of green chestnuts; a cluster of green acorns; a cluster of green pine nuts; a cluster of green macadamia nuts; a cluster of green Brazil nuts; a cluster of green cashews; a cluster of green pistachios.

AUSTRALIA'S TREE NUT INDUSTRY
SNAPSHOT 2025

Growing for Success

TOWARDS 2030

The Australian Nut Industry Council

Formed in 1988, the Australian Nut Industry Council (ANIC) is the federation of seven tree nut growing industries. ANIC is a not-for-profit organisation, led by a board representing the seven nut sectors and an Executive Officer. Collectively, the board and Executive Officer design and implement a wide range of activities to grow the Australian nut industry.

The members of ANIC and their representatives (as at July 2025) are:

Almond Board of Australia
Australian Macadamia Society
Australian Pecan Association
Australian Walnut Industry Association
Chestnuts Australia Inc.
Hazelnuts Growers of Australia Inc.
Pistachios Growers Association Inc.

Brendan Sidhu (Chair)
Clare Hamilton-Bate
Andrew Waddell
Andrew Georgiou
Trevor Ranford
Andy Gibson
David Crawford



Executive Officer, Cathy Beaton

PO Box 586 Loxton SA 5333

P 0417 317 098

E exec@nutindustry.org.au



Foreword



Growing for Success 2025 offers a timely and detailed snapshot of how Australia's tree nut industry continues to mature, innovate, and prepare for sustained growth. With updated production forecasts and market insights, it provides a sound basis for informed planning and investment decisions across the supply chain.

This report would not have been possible without the active participation and insights from each of the seven Australian tree nut industries. Their cooperation has been essential in capturing a whole-of-industry view that highlights both diversity and shared ambition.

As Chair of ANIC, I commend each group for their contributions and collaboration. This edition reinforces our commitment to working together on common challenges and opportunities, with a united focus on expanding markets, increasing value, and building long-term sustainability.

Brendan Sidhu,
Chair ANIC



The Australian tree nut industry is built on the strength of its individual sectors and their willingness to collaborate. *Growing for Success 2025* reflects this spirit of cooperation while offering practical insights into market trends, investment potential, and future industry direction.

This edition would not have been possible without the valuable input from each of the seven nut industry sectors —almond, macadamia, walnut, pistachio, pecan, hazelnut, and chestnut. Each has shared data, expertise, and a commitment to ensuring that the sector continues to grow sustainably and competitively.

Their efforts have resulted in a document that not only supports strategic planning and industry benchmarking but also showcases the high-quality and innovation that define Australian-grown nuts. I thank each group for their dedication and collaborative approach to building a vibrant and resilient industry.

Cathy Beaton
Executive Officer, ANIC



Table of contents

3	Why Australian nuts?
4	Growth continues for Australian tree nuts
6	Sustainable, in every way
7	Australian tree nut industry - growing stronger
8	Growing domestic consumption
9	Nuts and health
10	The Nuts for Life program - driving nut consumption
12	Trade & exports
14	Industry Snapshots
15	Almonds
16	Chestnuts
17	Hazelnuts
18	Macadamias
19	Pecans
20	Pistachios
21	Walnuts



Why Australian nuts?

The Australian tree nut industry is among the most sophisticated, highly mechanised and environmentally aware nut industries in the agricultural world, having developed in a competitive, globally-focused environment. Australia is the seventh largest producing country in the world for tree nuts. Australian nuts are successful - abroad and at home - for several reasons:

IN-SEASON NUTS – ALL YEAR ROUND

Australia provides reliable and premium quality supply in the northern hemisphere off-season. The Australian tree nut crop is timed perfectly to supply northern hemisphere markets for the critical Christmas/religious festivals trade, a shipping schedule that challenges northern hemisphere competitors. The benefit for the international nut trade and consumers is that they now have access to a ready supply of fresh nuts all year round.

CLEAN, GREEN AND SUSTAINABLE

Consumers today not only want foods that are of good quality, but also that have been produced safely and sustainably. Australia is recognised internationally as a 'clean and green' producer, often more so than other nut producing countries. This reputation is constantly being safeguarded by attention to biosecurity and environmental issues by both governments and growers. It is a powerful marketing point of difference.

TOP QUALITY FROM TOP GROWERS AND PROCESSORS

Australian tree nut growers are producing some of the best quality nuts in the world from farms big and small across the nation. All are highly regarded for their freshness, flavor, taste and quality.

Australian processing systems are considered world class and help provide consumers with the confidence that Australian nuts are safe and reliable. Investment in technology and infrastructure means processors are now at the leading edge in world's best practice in cracking, shelling, sorting, grading, scanning, packing, tracking and delivery. They are now also innovating to expand markets through the processing of value-added products.

INVESTMENT IN RESEARCH, DEVELOPMENT AND EXTENSION (RD&E)

Australian growers are at the global forefront for efficiency of inputs, nut yields per hectare and quality – results of their ability to adopt the very latest innovations and practices in production.

Investment in RD&E across all sectors of the tree nut industry is significant, resulting in world leading practice in new varietal development, water efficiencies, nutrition, biological controls, harvesting and post-harvest. The understanding and practice of growing high quality nuts in Australian conditions is constantly improving.

The nut industries have utilised the Australian Government RD&E and marketing levy models in partnerships which have assisted in the rapid growth in productivity and export earnings over the last decade. For example, tree nut industries have been long term active partners with Australia's research and development corporations like Hort Innovation and AgriFutures Australia.

EXPORT FOCUSED

Due to Australia's relatively small population, farmers here are acutely aware of the need for, and needs of, export markets and the importance of supplying reliable lines of high quality product.

STRONG LEADERSHIP

Australia's tree nut industries have strong, well-organised industry associations which support growers in delivering RD&E and marketing initiatives, as well as providing informed representation and advocacy. All have a focus on ensuring growers have the best advice, as well as working to expand markets, both domestically and overseas.

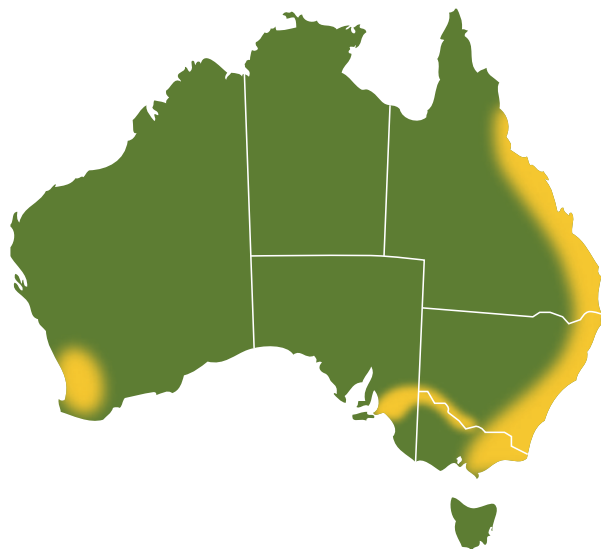
The Australian Nut Industry Council works collectively with government at a national level to help development international markets further.

Field days in each tree nut industry allow growers and suppliers to industry to share ideas like the use of aerial drops of pheromones to attract bees for pollination



Growth continues

~ for Australian tree nuts



The Australian tree nut industry is a national success story in Australian agriculture. The farm gate value in 2025 was over AU\$1.58 billion, making the industry not only a significant contributor to the Australian rural and regional economies, but also contributing more than a third of Australia's horticultural exports.

Just in the last five years the industry has seen significant new plantings across all tree nuts, particularly in almonds and macadamias. With a lead time of 5-10 years, this expansion is likely to push the farm gate value to well over \$1.75 billion by 2030.

Tree nuts have been grown in Australia for over 100 years and productivity has never been higher. With gross revenue per hectare ranging up to \$30,000, this is accompanied by economic returns to the community that are 10 to 20 times higher than the return from traditional row crops. It is not surprising therefore that across Australia the industry is seeing growers changing from their existing crops to tree nuts.

Strong markets, sound business models and free trade agreements with key export nations have led to the development of a maturing nut industry. By 2030 the macadamia industry is predicting an increase in production area to 57,600 hectares. Similarly almond production is forecast to increase to 170,000 hectares.

All tree nut sectors in Australia are growing. Pistachio's are predicted by 2030 to have 4,500 hectares in production which is a 500% increase since 2011. With walnuts increasing by 72%, pecans 85% and, chestnuts 45% with hazelnuts rebounding to 2021 levels.

The expansion of the nut industries generates flow-on business to associated sectors such as input suppliers, beekeeping, plant nurseries and local economies. Employment opportunities in the tree nut industry and supporting sectors remain strong.

The nut sector has sustained growth in domestic consumption of 5.6% year on year over the last 20 years. The industry retail value of the domestic market exceeds \$1.5 billion per annum (2025).

On the export front in 2025 almonds, macadamias, walnuts, pecans and chestnuts exports to more than 65 countries totaled nearly \$1.6 billion.

Almonds and macadamias are in the top four of Australia's most valuable horticultural export commodities with almonds coming in at number one.



Export sales of tree nuts increased to \$1.2 billion in 2025 and continues its growth with new markets.

Australian nuts attract a premium in markets that appreciate food safety, product quality and reliability of supply chains.

Overseas buyers recognise Australia as the source of premium quality nuts, which are especially prized in the northern hemisphere. The industry is focussed on developing programs to ensure market opportunities are maximised both domestically and internationally and is working closely with government to develop new markets overseas.

Driving all activities across the tree nut industries is a commitment to sustainability. Research and development is paramount, growers are committed to better practice whether it be related to plant biosecurity, environmental issues such as water efficiency and climate change, and the social licence of communities in which they operate.

The potential for large economic losses from these threats are exacerbated because of the longevity of production within tree nut crops (25 to 100 years) in comparison to those industries with shorter production cycles (annual and biennial crops). Programs that protect the long-term investment of the tree nut industries from these risks are continually being updated and need to feature strongly in government policy.



Pistachio plantings are expected to increase to more than double by 2030.



Sustainable, in every way



Sustainability has been, and will continue to be, an ongoing commitment for the Australian tree nut industry.

Growers, processors and marketers are committed to best practice in the ways they do business and sustainability is critical to the industry's continuing success. Sustainability is now expected worldwide – by consumers, investors and governments.

The concept reaches into every part of the Australian tree nut industry. Growers are committed to using water as efficiently as possible, reducing impacts on the environment by building soil health, reducing the use of pesticides and herbicides, and recognising the social licence with which they operate in their local communities, as well as their contribution to these communities.

'Clean and green' is the advantage that Australia has in the global agricultural marketplace and nut growers realise the challenges to protect the environments in which they operate.

Considerable investment continues to be made into Research and Development programs to improve productivity through varietal development and selection, orchard management and crop protection, as well as developing new markets which will welcome

the quality of Australian nuts and the safe, ethical way in which they are produced.

Much of this investment is made through Hort Innovation, a national body which works with horticulture to improve the productivity and global competitiveness of specific industries.

Australia's tree nut industries are committed to Hort Innovation's Australian-grown Horticulture Sustainability Framework, with four pillars:

- 'Nourish & Nurture' recognises the role of Australian horticultural produce in improving diets, health and wellbeing by providing safe, quality food and greenlife.
- 'People & Enterprise' identifies the strong links between the people, enterprises, communities and economic value of Australian-grown horticulture.
- 'Planet & Resources' focusses on reducing any impacts on the natural environment and on the dependence of horticultural production on resources, biosecurity and resilience to climatic variability.
- 'Less waste' is about reducing all forms of waste in horticultural production.

Within the pillars there are 17 focus areas that align with the United Nations' Sustainable Development Goals.

Goals such as 'Communities'. They are the lifeblood of Australian horticulture and the tree nut industries are part of communities in all Australian states, contributing significantly to their economic well-being, as well as that of the national economy.

Plus 'Good Health and Well Being'. Regularly eating nuts has been shown to contribute to heart health, reduce overall mortality and the risk of developing type 2 diabetes, assist with weight management, reduce the risk of cancer and contribute to good health in so many other ways. What a great attribute towards being sustainable!

'Climate action'. Nuts grow on trees – trees which capture and store a significant amount of carbon both above and below the ground over their 25 years plus lifecycle. Another tick on the sustainability framework.

ANIC is also a member of INC – the International Nut & Dried Fruit Council – which is committed to sustainable growth in the global industry. It has identified nine of 17 Sustainable Development Goals set by the United Nations that the nut industry can help achieve by 2030.

Best practice is all about continuous improvement – doing things better and sustainably, so that in 2030 the Australian tree nut industry will be the best it has ever been, in every way.

Sustainability will contribute to the vision that not only will Australia's tree nut industry surpass a value of \$2 billion by 2030, but it will be in great shape for the future beyond.



Research at the Mildura Smart Farm is utilising drones (foreground) and also LIDAR which is used in mapping orchard canopy, flowers, fruit and yield.

Australian tree nut industry

~ growing stronger



Capital and expertise have combined to drive the expansion of area under nut cultivation in Australia. The industry is now a mixture of large 'corporate' farms and medium to small-sized family farms. Average farm size continues to rise.

Tree nut production in Australia is dominated in scale by almonds and macadamias. Almonds represent more than 50% of the total area planted and the tonnage produced. The macadamia, Australia's iconic native species, accounts for approximately one third of both area planted and tonnage produced.

Since 2011 the total area planted has increased by 240% to 124,000 hectares in 2025. Additionally farm gate value has increased to \$1.58 billion an increase of 480% since 2011 with further plantings and farm gate value forecast to increase to \$1.75 billion by 2030.

Tree nuts continue to provide an attractive alternative to the traditional but lower value Australian crops under pressure from overseas competitors. Nut growing converts land from these other crops with relatively lower financial returns per hectare to intensive crops with a high return per hectare of land and per megalitre of water.

Tree nut industries require long-term investment in capital, technological skills and research, development and extension (RD&E). With the support of RD&E funding from the Australian Government and our own nut industry levies, Australia is now producing some of the highest nut yields per hectare in the world. Long-term breeding programs aimed at improved varieties are also in place.

A foundation for the industry's growth has been widespread adoption of global best practice by growers, who have successfully adapted this knowledge to Australian conditions. Advanced production systems with new tree architecture and harvesting methods are addressing the challenges of growing in semi-arid environments. Industry led RD&E programs are developing new varieties to increase the productivity and resilience of nut trees, while investment in irrigation technology is achieving higher water use efficiency (returns per megalitre of water applied are up to \$3,000).

The Australian tree nut industries are widely respected around the world for their knowledge and culture of innovation. Australia enjoys a reputation across the world for unsurpassed food-safety and environmental standards. Our relative isolation has generally provided Australian agriculture with a pest and disease-free environment, but biosecurity remains a critical factor in ensuring this continues.

The tyranny of distance generally means that most agricultural commodities carry a high export freight cost to our major markets. By contrast, the high value of nuts compared to most broadacre crops means the freight cost is a small component.

From orchard to processing to value adding, the Australian tree nut industry has excelled. Underpinning this success are many factors including adaption to a variety of climatic and agronomic zones, excellent infrastructure and processing systems, investment in RD&E and skilled growers and advisors.

AREA PLANTED, PRODUCTION AND FARM GATE VALUE OF AUSTRALIAN TREE NUTS (ACTUAL/FORECAST)

Area Planted, ha	2011	2021	2023	2024	2025	2030
Almonds	26,944	60,000	64,192	66,000	66,000	66,000
Macadamia	18,000	36,000	41,703	44,135	46,000	52,400
Walnuts	2,790	4,100	4,300	4,100	4,200	4,800
Pecans	1,400	2,115	2,115	2,165	2,265	2,600
Chestnuts	1,240	1,500	1,480	1,500	1,600	1,800
Pistachio	900	1,900	2,500	3,000	3,250	4,500
Hazelnuts	140	2,750	2,750	600	800	2,200
Total hectares	51,414	108,365	119,040	121,500	124,115	139,500

Production, tonnes	2011	2021	2023	2024	2025	2030
Almonds, kernels	37,626	124,000	110,707	153,550	140,000	170,000
Macadamia, kernel equivalent	8,978	17,388	17,646	19,669	20,400	34,000
Walnuts, kernel equivalent	1,728	6,500	3,600	5,800	5,200	6,000
Pecans, kernel equivalent	1,540	1,620	1,850	1,900	2,000	2,300
Chestnuts, inshell	1,100	1,300	1,255	1,078	1,200	1,600
Pistachio, inshell	1,100	3,000	1,400	4,400	1,800	12,000
Hazelnuts, kernel equivalent	32	400	580	544	600	1,800
Total Production, tonnes	74,560	195,434	137,038	186,941	171,200	227,700

Farm Gate Value \$m	2011	2021	2023	2024	2025	2030
Almonds	\$188	\$882	\$642	\$998	\$1,218	\$1,105
Macadamia	\$88	\$287	\$104	\$202	\$240	\$400
Walnuts	\$14	\$66	\$20	\$41	\$44	\$50
Pecans	\$19	\$13	\$18	\$23	\$24	\$28
Chestnuts	\$9	\$10	\$10	\$8	\$10	\$14
Pistachio	\$11	\$33	\$18	\$49	\$36	\$110
Hazelnuts	\$0	\$12	\$7	\$6	\$8	\$24
Total \$m	\$329	\$1,303	\$819	\$1,327	\$1,580	\$1,731

Growing domestic consumption



Healthy eating trends and increasing consumer support for Australian 'clean and green' grown produce are driving sales of tree nuts in Australia.

The marketing investment by industry has also contributed greatly to the consistent growth in domestic consumption of tree nuts through direct promotion and marketing programs.

The Nuts for Life program, facilitated by the Australian Nut Industry Council (ANIC), in partnership with Australian nut industry members, is responsible for communicating

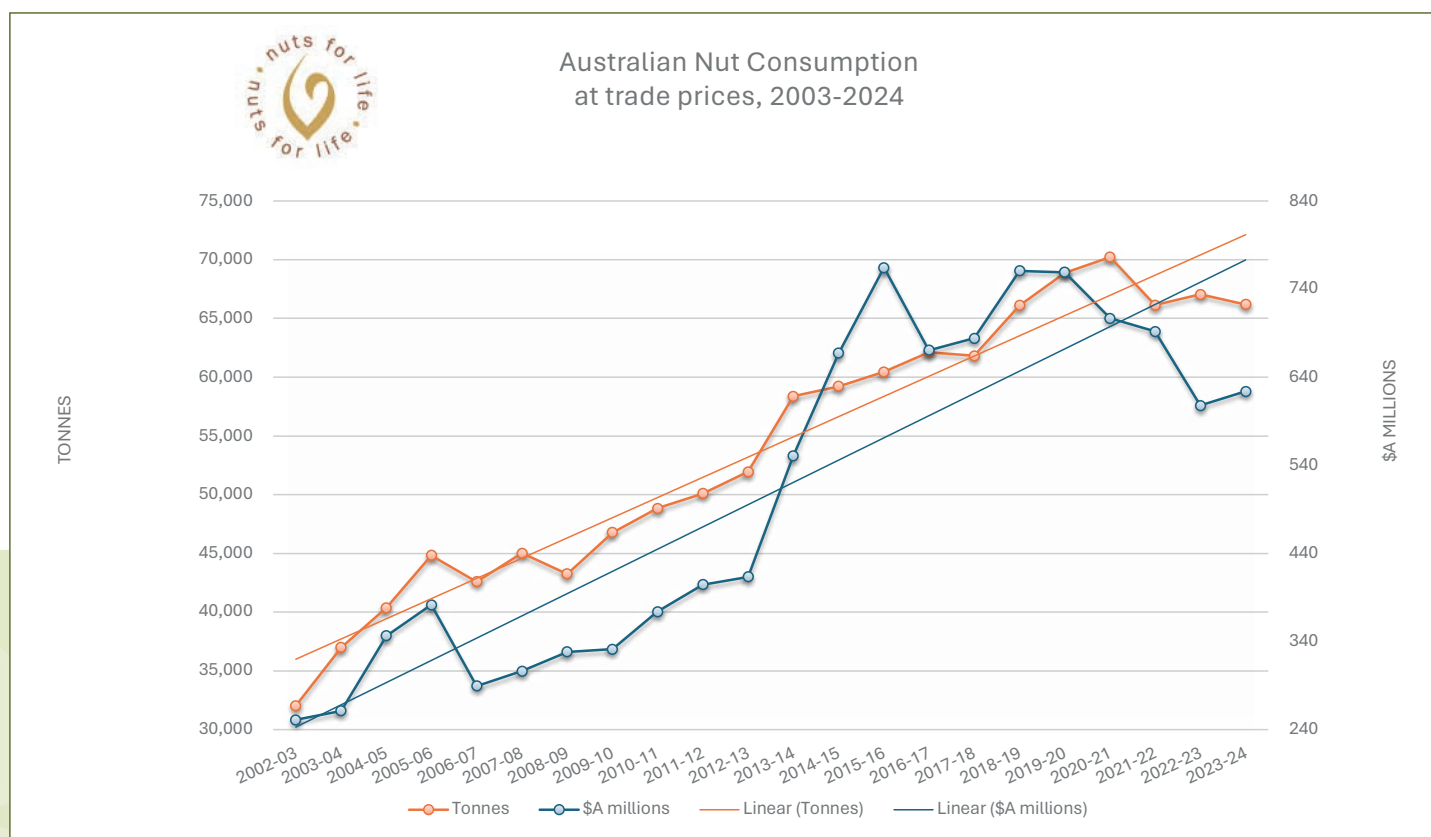
the health benefits of nuts, with the aim of growing nut consumption amongst Australians.

The program, now in its 21st year, is partially funded by voluntary contributions from all sectors of the nut industry supply chain – a testament to their commitment to the Nuts for Life program.

Australian nut consumption (at trade prices) has more than doubled since 2002-3, reaching over 70,000 tonnes in 2021, and falling marginally to 66,187 tonnes in 2023-4.

The Australian nut crop is heavily consumed in local markets and any shortfall between domestic demand and available supply is met by imports. The almond, macadamia, walnut and pecan industries have all been developed with a strong international focus and are increasingly exporting as their production bases grow.

With domestic consumption over 70,000 tonnes in 2020-21 this would value the sales on current trade prices at over \$700 million, or an estimated retail value of \$1.5 billion.



Source: Nuts for Life

Nuts and health

Nuts have earned their place as an important food within healthy dietary patterns, thanks to the significant role they play in delivering essential nutrients, and decades of research highlighting their positive health outcomes.

Nuts are nutrient powerhouses – providing unique combinations of essential nutrients and bioactive compounds. They are rich in plant-protein, healthy unsaturated fats (mono- and polyunsaturated fats, including omega-3 fatty acids), and dietary fibre. They also contain vitamins (e.g., folic acid, niacin, vitamin E, vitamin B6), minerals (e.g., copper, magnesium, selenium, phosphorus, potassium and zinc), and bioactive compounds such as antioxidants, phytosterols and other phytochemicals. Nuts are cholesterol- and gluten-free, have a glycaemic index lowering effect, and are naturally low in sodium and sugar.

The impact of nut consumption on health outcomes has been extensively investigated since the first known publication in 1992, which showed that eating nuts was associated with a lower risk of coronary heart disease [1]. And since then, thousands of research studies have consistently confirmed nuts' positive effect on health.

Regularly eating nuts has been shown to contribute to heart health, reduce overall mortality, reduce the risk of developing type 2 diabetes, assist with weight management, reduce the risk of cancer, improve sperm quality and cognitive function, and overall promote good health [2-5].

EATING A HANDFUL OF NUTS A DAY IS ASSOCIATED WITH:

- 25% reduced risk for coronary heart disease
- 22% reduced risk of death from cardiovascular disease (CVD)
- 22% reduced risk of dying from all causes
- 21% reduced risk for CVD
- 11% reduced risk of dying from cancer [6]

Despite their energy density and high fat content, nut consumption does not lead to weight gain, and in fact, may instead support weight management. A recent study [7] showed that, compared to those eating few nuts, those who ate the most nuts had a:

- 7% reduced rate of overweight/obesity
- 28% lower risk of an unhealthy waist size
- 5% reduced risk of gaining ≥5kg.

Yet, despite their health benefits, nut consumption amongst Australians remains chronically low. Combined data show that, on average, Australians consume around 6g per day [8, 9] – far short of the public health target of 30g per day.

For the health benefits of nuts to be fully realised, there is clearly a need to find ways of enabling shifts in national dietary patterns to get more Australians eating more nuts, more regularly.

REFERENCES

1. Fraser, G.E., et al., A possible protective effect of nut consumption on risk of coronary heart disease. The Adventist Health Study. *Arch Intern Med*, 1992. **152**(7): p. 1416-24.
2. Aune, D., et al., Nut consumption and risk of cardiovascular disease, total cancer, all-cause and cause-specific mortality: a systematic review and dose-response meta-analysis of prospective studies. *BMC Med*, 2016. **14**(1): p. 207.
3. Li, H., et al., Nut consumption and risk of metabolic syndrome and overweight/obesity: a meta-analysis of prospective cohort studies and randomized trials. *Nutr Metab (Lond)*, 2018. **15**: p. 46.
4. Salas-Huetos, A., et al., Effect of nut consumption on semen quality and functionality in healthy men consuming a Western-style diet: a randomized controlled trial. *Am J Clin Nutr*, 2018. **108**(5): p. 953-962.
5. Nishi, S.K., et al., Are fatty nuts a weighty concern? A systematic review and meta-analysis and dose-response meta-regression of prospective cohorts and randomized controlled trials. *Obesity Reviews*. n/a(n/a): p. e13330.
6. Balakrishna, R., et al., Consumption of Nuts and Seeds and Health Outcomes Including Cardiovascular, Diabetes and Metabolic Disease, Cancer, and Mortality: an Umbrella Review. *Adv Nutr*, 2022.
7. Nishi, S.K., et al., Are fatty nuts a weighty concern? A systematic review and meta-analysis and dose-response meta-regression of prospective cohorts and randomized controlled trials. *Obesity Reviews*, 2021. **22**(11): p. e13330.
8. Nuts for Life. Australian Nut Industry Statistics, 2023-4. 2024.
9. Nikodjivic, C.J., et al., Nut consumption in a representative survey of Australians: a secondary analysis of the 2011-2012 National Nutrition and Physical Activity Survey. *Public Health Nutr*, 2020: p. 1-11.



The Nuts for Life program

~ driving nut consumption



Nuts for Life is a productive, collaborative health education project, that has added significant value to the wider nut industry over more than 20 years. Created in 2003, the program's mission is to promote regular nut consumption, by collating the latest evidence-based information, and informing Australians about the impact nut consumption has on health outcomes.

The program has built a reputation as Australia's credible voice for the vital role nuts play in good health and nutrition. And, it's played a key role in helping drive nut consumption in Australia – which has more than doubled in volume, and tripled in value since 2003, to achieve an increase of around 5% compound growth per annum.

Economic modelling, by KPMG for Nuts for Life, revealed, that increasing nut consumption among Australians from the current intake of 4.6g to 30g per day has the potential to reduce health care expenditure in Australia by at least \$980 million per year.



Some of Nuts for Life's significant achievements to date include:

- The launch of the 2030 Vision, aimed at driving nut consumption
- Improved positioning for nuts in public health policy (e.g., Health Star Ratings System, and the Australian Dietary Guidelines)
- The launch of the Healthy Handful logo
- Commissioning PhD and other research projects that have advanced nut nutrition and health science
- A highly-effective website, with impressive ongoing growth in traffic
- Significantly more health professionals now recommending nuts
- Securing a general-level health claim for nuts and heart health
- Supporting industry, including through workshops and training
- Strengthened connections with the INC, International Nut and Dried Fruit Council, and securing INC dissemination grants..

Nuts for Life continues to work towards achieving three significant long-term objectives, which will drive growth and demand and will increase nut consumption amongst Australians:

1. Increase the prominence of nuts in the next re-iteration of the Australian Dietary Guidelines,
2. Gain approval for a high-level health claim, and
3. Change the narrative on nuts and weight, to reflect current scientific research.

Building support for the health benefits of nuts, as part of a sustainable food system, is crucial to the success of these long-term objectives. Consequently, Nuts for Life educates and empowers health and food service professionals (via numerous activities and channels), and engages with food and health policy professionals, to communicate the importance of a daily handful of nuts



"Nuts For Life has been instrumental in breaking through consumption barriers and educating Australian health professionals about the vital role daily nut consumption can play in human health."

Nuts for Life is facilitated by ANIC, in partnership with Australian nut industry members. The program is funded through Frontiers developed by Hort Innovation, with voluntary co-investment from the Australian nut industry, and contributions from the Australian Government.



Engaged in more than **110 health professional conferences** and events, with a **reach** of almost **80,000** health professionals



Acquired more than **4,000 subscribers** to NutENews for health professionals



Gained more than **45,000 social media followers** – across X, Facebook, Instagram, and LinkedIn



Showcased more than **200 recipes** on the nutsforlife.com.au website



Grown website traffic, to (mostly recently) achieve more than **295,000 page views** annually



Dropped over **50** podcast episodes



Made over **10 nutrition** and **health policy** submissions on behalf of industry

Trade & exports

In line with growing international consumption, tree nuts continue to perform strongly in the export sector, dominating Australia's horticultural exports.

Tree nuts account for more than a third of all horticultural exports and are consistently valued at over AU\$1.6 billion (2025). Prospects for export growth are also strong.

This is largely thanks to the powerful and persistent worldwide dietary trend and a strong set of local production values that emphasise food safety and eating quality, as well as excellent social and environmental stewardship credentials.

Australia currently exports nuts to around 65 countries. The principle barriers to expanding exports are the tariffs that remain in some key existing and some potential new markets. These tariffs restrict nut consumption by increasing the price to the importing market, in some cases prohibitively.

Free trade agreements (FTAs) between Australia and Japan, China, Taiwan, United Kingdom, UAE and South Korea have seen exports of Australian-grown nuts increase dramatically to these markets in the last few years. These FTAs have led to nut tariffs being phased out in those countries. These FTA markets still offer significant potential for growth. Other markets such as India, a major nut importer, following the India Australia-Economic Cooperation Trade Agreement, has made strong progress and offers even more potential.

AUSTRALIAN TREE NUT EXPORT VOLUME *

Exports, tonnes (FY)	2011	2021	2024	9mths FY 2025
Almonds, kernels	24,483	98,328	126,863	126,548
Macadamia, kernel equivalent	8,905	25,004	29,870	25,647
Walnuts, kernel equivalent	1,312	5,699	991	3,433
Pecans, kernel equivalent	721	770	425	154
Chestnuts, in shell	671	1	6	1
Pistachio, in shell	300	622	596	2,817
Hazelnuts, kernel equivalent	-	6	2	72
Total exports, tonnes	57,069	130,339	158,692	158,672

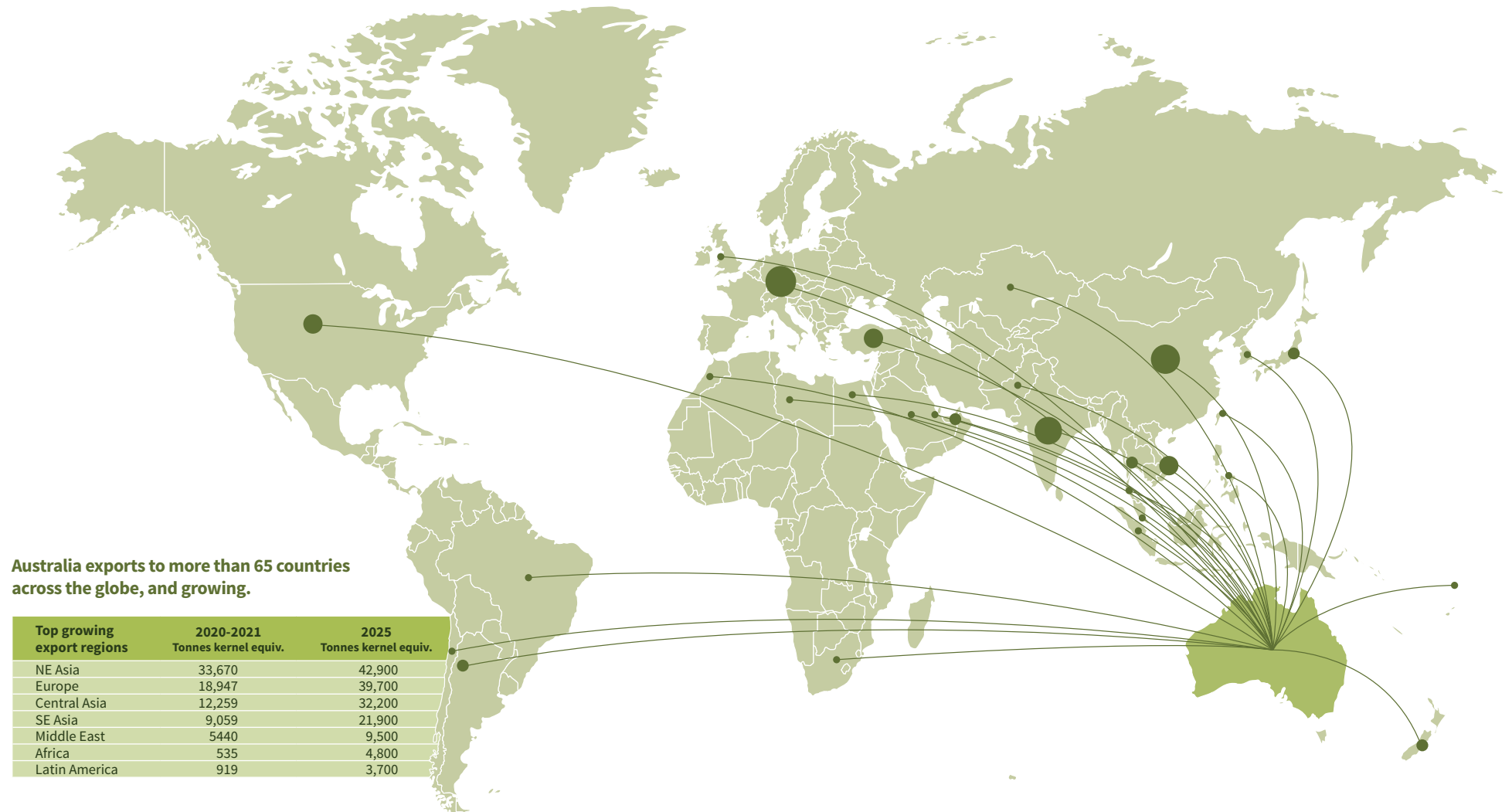
*Data sourced from the ABS as of March 2025.



The development of export markets is supported by Australian tree nuts being present at major international trade shows.



AUSTRALIAN TREE NUT EXPORT MARKET 2025



Industry Snapshots



Almonds

Australian almonds are in demand from buyers all around the world who recognise their premium quality and the commitment of Australian almond growers to sustainable farming practices. The industry has invested significantly in added-value processing and offers an enhanced supply capability for the full valued-added range of almond products. The farmgate value of the Australian almond industry is forecast to exceed \$1.4 billion by 2030.



PRODUCTION AREAS

- There are five major growing regions in Australia:
 - Adelaide Plains* and the Riverland** (South Australia)
 - Sunraysia** (Victoria)
 - Riverina** (New South Wales)
 - Swan Region** (Western Australia)
- Ownership structures are diverse with orchards owned by sole producers, family enterprises, both private and public companies, and investment funds.

CURRENT PRODUCTION

- Production in 2024 was 153,550 tonnes of kernel.
- The four major varieties grown in Australia include: Nonpareil (46%); Carmel (32%); Price (9%); and Monterey (7%) with other varieties making up the remainder. Of note is that the Monterey variety has increased its share of planting to 11%, so its share of production will similarly grow as trees mature.

- Approximately 56% of almond production (kernel) comes from Victoria's growing regions, followed by 19% from South Australia, 24% from New South Wales and less than 1% from Western Australia.
- Increased production capacity of value-added almond products such as almond meal, slivered almonds, flaked almonds, almond paste and almond butter position the Australian almond industry to help their customers grow with innovative solutions.

INDUSTRY POTENTIAL

- The industry continues its growth trajectory in production based on the new plantings over the past five years. The Australian almond crop is forecast to grow from 153,000 tonnes in 2024 to 170,000 tonnes in 2026. As ongoing new plantings are expected to plateau, the crop is forecast to plateau at this level as replanting on significant acreage takes place.
- Global consumer demand for almonds remains strong as the supply-demand balance returns to a more viable equilibrium. The world's major producing region, California, has also seen production level out after several years of below cost returns. Consumer demand, while taking some time to grow in alignment with this increase, is reaching up to the supply line. With the pressures of regulation around water use impacting confidence in California, global supply is expected to steady over the short to medium term.
- Demand is being driven by improving living standards in major export markets, the range of new food products using almonds as an ingredient and the increasing consumer awareness of the health benefits of almonds.

MARKETS: PRESENT AND FUTURE

- The mainstreaming of plant-based foods across the globe has elevated the demand for almonds. The versatility and health benefits of the almond as an ingredient continues to drive consumption as the diets of many seek alternative protein sources. As the Southern Hemisphere's largest almond

producer the growth of the Australian almond industry in both its kernel and value-added almond range means that it is a reliable supplier for 12 months a year.

- From an export perspective, Australian almonds are being chosen as a trusted brand in more than 50 countries which highlights a well-diversified market reach. The short to mid-term challenges for meeting demand will be significantly influenced by overcoming the ongoing global sea freight congestion.
- Almonds continue to be Australia's most valuable horticultural export product.
- While the Free Trade Agreement with China encouraged increased shipments, the Australian almond marketers remain close to their customers in the key established markets of Europe, India and the Middle East. All these core markets are experiencing growth as Australian almond exports move into multiple sales destinations.
- Marketing and promotion programs funded by industry levies in the US and Australia have been effective in increasing their respective domestic per capita consumption and targeted overseas market development.

COMPETITIVE ADVANTAGES

- Australian orchards produce the same varieties as the California almond industry, providing a reliable alternative sourcing option. Give the shipping constraints, procurement teams are spreading their risk and sourcing wider than ever before to minimise the risk of inventory shortfalls.
- Counter-seasonal production to California provides buyers with fresh product and often greater access to kernel sizes that are so popular with retailers and the premium end of the market.
- Superior crack-out rates (in-shell to kernel ratio) is significant in markets preferring in-shell product.
- Free Trade Agreements in Asia (eg: China, India and South-East Asia).
- Australia's geographic proximity to expanding Asian markets.

Chestnuts

The Australian industry processes in a limited capacity; Chestnut flour, purée products and some beverages. These value added products are being successfully marketed within Australia, but there is opportunity to expand the value-added space nationally and internationally.



PRODUCTION AREAS

- The Australian chestnut industry operates in the southern states of Australia, including
 - NSW:** Around Orange, Southern Tablelands, Blue Mountains and Batlow
 - Tasmania:** Northern and Central
 - Victoria:** North-east and Central; East of Melbourne
 - South Australia:** Adelaide Hills
 - Western Australia:** South-west
- Approximately 70% of the national crop is grown in north-east Victoria.
- The main varieties grown are Red Spanish, Purtons Pride and De Coppi Marone. Chestnuts flower during November and December and are harvested from March through to May.
- Many chestnut orchards are small family-owned orchards, but there are several large-scale commercial plantings and the average size of new orchards is increasing.

CURRENT PRODUCTION

- In 2024, chestnut production was valued (farm gate) at \$8.2 million based on a production of 1,100 tonnes in-shell.
- In 2024 the industry comprised around 310,000 chestnut trees grown on approximately 1,500 hectares. The industry estimates that with more trees being planted, farm gate value will increase to approximately \$12 million by 2025.
- The industry is primarily focused on the domestic market with approximately 2% exported, mainly to Asian markets.
- Production, based on a 2-year average, is about 1,167 tonnes in-shell a year of fresh chestnuts. (2023 - 1,255 tonnes and 2024 - 1,078 tonnes.)

INDUSTRY POTENTIAL

- Chestnut production is expected to increase to 1,400 tonnes in-shell by 2025 (subject to climatic conditions) as young orchards come into production.
- New varieties and improved orchard management techniques have reduced time to bearing and resulted in increased nut yield, nut size and ease of peeling.
- Some chestnuts are handpicked but more growers have moved to being fully mechanised as a result of development of new harvesting machinery.
- Growers continue to plant and re-work older trees to more consumer-friendly varieties.

MARKETS: PRESENT AND FUTURE

- Chestnuts are highly valued in Europe, the USA, Japan, China and Korea.
- Most growers sell their crop through the fresh wholesale markets.
- Current chestnut consumption in Australia is estimated at 1,300 tonnes in-shell, which is satisfied by domestic production.
- Small quantities of fresh and frozen peeled chestnuts are mainly exported to South East Asian countries.

- The Australian industry continues to develop new processing techniques for frozen peeled chestnuts, chestnut meal, flour and puree products. These value-added products are now being successfully marketed locally and overseas and have the potential to expand the overall market for chestnuts.
- The chestnut industry is seeking new export markets for fresh and frozen peeled chestnuts to sustain increased production.
- Nut size is important in the fresh chestnut market and new pruning techniques have enhanced this quality.

COMPETITIVE ADVANTAGES

- Australian chestnuts are fresh in the northern hemisphere off season and are highly regarded in Japan for great flavour and quality appeal.
- With the exception of New Zealand, importing fresh chestnuts into Australia is prohibited.
- Australia is free from insect pests such as the Chestnut Gall Wasp and Chestnut Weevil.
- Australia's pest-free status means chestnuts are produced without insecticides.
- The Eradication Program for Chestnut Blight that was undertaken by Chestnuts Australia Inc in partnership with Agriculture Victoria has moved to an industry managed program. While this fungal disease has devastated orchards and native forests overseas, it is under control and regular surveys aim to eradicate it completely.
- The Australian chestnut industry is consumer focused and the latest tree varieties being selected are based on ease of peeling and superior flavour. Overseas, yield is generally given a higher priority than eating quality in varietal selection.



Hazelnuts

The industry is set for rapid expansion. As young orchards come into commercial bearing, the industry estimates hazelnut production by 2023 will be 2,200 tonnes of kernel (5,500 tonnes in-shell) with a farm gate value of \$40 million.



PRODUCTION AREAS

- Hazelnuts are mainly grown in the temperate areas of south-eastern Australia. Main production regions are the Central Tablelands of New South Wales around Orange, Narrandera, and northeast Victoria around Myrtleford. They are also grown in central and eastern Victoria and increasingly in northern Tasmania. There are small levels of production in Queensland, South Australia and Western Australia.
- Many hazelnut operations are small orchards of up to 6,000 trees although this is slowly changing with the average size of new hazelnut orchards increasing and more productive varieties being planted.
- Most orchards are family operated enterprises. Hazelnuts generally take seven to 10 years to come into commercial production.
- The major on-farm investment in hazelnuts is being undertaken by current growers and investors but there are opportunities for long-term investment by new entrants.

CURRENT PRODUCTION

- In 2024, hazelnut production was valued at \$5.5 million (FGV). There is approximately 600 hectares planted to hazelnuts, consisting of around 120,000 trees with approximately 60% in production and 40% new plantings.
- Production is currently about 200 tonnes of kernel equivalent (550 tonnes in-shell), which will increase dramatically as recently planted orchards begin producing commercial quantities.
- Hazelnuts production thrives in temperate regions including Tasmania and the cooler, higher altitude regions of Victoria and New South Wales.
- During 2023/24 Agri Australis (Ferrero) removed 950,00 hazelnut trees across 1,900 hectares from their orchard in Narrandera, NSW and sold the property.

INDUSTRY POTENTIAL

- The industry is set for rapid expansion with a further 220,000 trees being planted by 2030. As young orchards come into commercial bearing, the industry estimates hazelnut production by 2030 will be 2,200 tonnes of kernel equivalent (5,500 tonnes in-shell) with a value of \$20 million (FGV).
- Growth in hectares under production is also expected as farmers look towards increased crop diversity.
- Recent research highlights that plantings in warmer regions will only be successful with new low-chill requirement varieties that are suited for warmer temperatures.
- Interest in growing hazelnuts in Australia is increasing with a key driver being the opportunity to offer fresh Australian hazelnuts to the domestic consumer. As more production comes on-stream, Australian hazelnuts will increasingly become an import replacement crop for restaurants, premium quality confectioners, patisseries and 'foodies'.
- In 2024 AgriFutures Australia in partnership with Hazelnut Growers of Australia Inc launched a new \$2 million R&D program being led by Charles Sturt University. The program includes up to 10 separate projects to be conducted across a 5-year period.
- A 'consortium' of growers and nurseries have recently imported new varieties from Chile with the objective of broadening the genomic base of plant material.

MARKETS: PRESENT AND FUTURE

- Current domestic consumption of Australian hazelnut kernel equivalent is relatively small at about 160 tonnes (400 tonnes in-shell) a year. Domestic consumption of imported hazelnut kernel is 1,800 tonnes, equivalent to 4,500 tonnes in-shell.
- A major hazelnut cracking and processing facility has been established in North East Victoria with the broad objective of servicing small growers with a single processing and sales structure.
- Australia imports 3,500 tonnes of hazelnut product primarily from Turkey each year and mainly as kernel which is generally used by mass market confectioners.
- Australian hazelnuts in-shell are sold at farmers' markets, fruit shops, health food shops and co-operatives. There are several boutique cracking facilities producing kernel which is sold through the internet, at farmers' markets and to confectioners and patisseries. Some producers value-add to their kernels by making confectionery and health food products, hazelnut oil, flour and meal.
- Locally grown kernels receive a price premium and are sought after by restaurants, confectioners and patisseries because of the fresh taste of the local product compared to imported kernel.
- Demand for hazelnuts is increasing globally and as awareness of the health benefits of including nuts in the daily diet grows, consumption continues to increase.
- There is potential for exporting in-shell to Asian markets where foodstuffs produced under high safety standards are preferred.
- Between 2,500 and 3,000 hectares of well-managed plantings would meet Australia's current and future requirements.
- There is also potential to provide fresh, high-quality counter seasonal product to northern hemisphere markets.

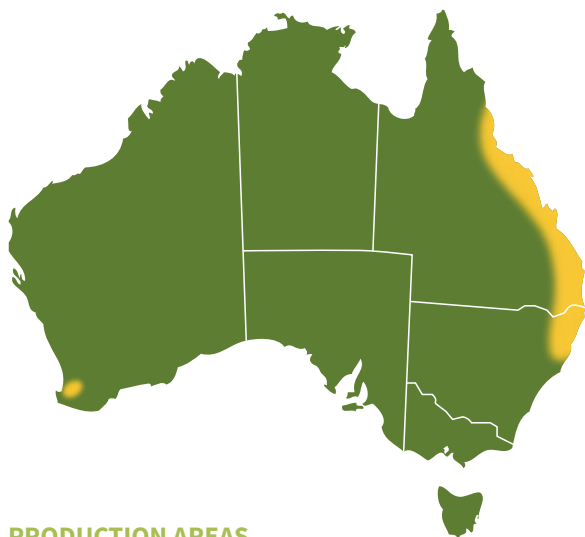
COMPETITIVE ADVANTAGES

- Australia is free from Eastern Filbert Blight, a serious disease affecting the industry in the US.
- Because of the absence of serious pests and diseases in Australia, hazelnuts are produced with little use of herbicides and pesticides and some organically certified hazelnuts are now being produced in Australia.
- Australian production is well supported by research, leading to improved, more efficient and sustainable production systems.



Macadamias

By 2030 Australia will have about 52,400 ha planted to macadamias, with kernel production greater than 34,000 tonnes (100,000 tonnes in-shell) and an export value of over \$600 million.



PRODUCTION AREAS

- Macadamias are grown along the eastern seaboard of New South Wales and Queensland, from Port Macquarie in the south, through to the Atherton Tablelands in the north. 70% of the Australian crop is produced in QLD and 30% in NSW.
- Production has expanded most rapidly in Bundaberg (QLD), with the region now accounting for over 50% of production.
- Ownership structures are diverse and comprise a combination of family-owned orchards, first time farmers, agri-business corporates and international and joint venture investments. The scale of new plantings is increasing significantly.

CURRENT PRODUCTION

- Production in 2024 was 57,850 tonnes @ 10% in-shell. Total area under macadamia production in 2024 was 44,129ha, of which 32,716ha is bearing.
- Production for 2025 was originally forecast to be 60,000 tonnes in-shell. However due to exceptional weather conditions, this was downgraded mid-season to 42,500 tonnes in-shell. A return to the previous growth trajectory is expected in 2026.

INDUSTRY POTENTIAL

- The industry is in the middle of its fastest growth since the early 1990s. There are new plantings in established regions such as the northern rivers of NSW and Bundaberg in Queensland. New plantings are also occurring in Rockhampton, Mackay, Maryborough and Emerald (QLD), and the Richmond Valley (NSW). Bundaberg became the single largest growing region in 2016.
- The recent resurgence in new plantings has seen over 10,000 ha established in the last five years. Of these recent plantings, about one third are yet to reach full production.
- By 2030 about 52,400 ha will be planted to macadamias with kernel production of over 34,000 tonnes, or 100,000 tonnes in-shell. Export value is expected to exceed \$600 million.
- Global production is expected to double by 2030 and global demand remains strong. Consumption is increasing as interest in healthy foods and awareness of the versatility of tree nuts rise. With continued investment in demand stimulation from both the Australian macadamia industry and the World Macadamia Organisation, it is anticipated that demand will keep pace with the increase in global supply.
- In recent years, the in-shell market has grown rapidly consuming up to 50% of global production at its peak. The kernel markets in Asia remained strong. The Europe kernel market has returned to growth and the macadamia industry is making inroads into the emerging market of India. Other major nut consumer markets such as Indonesia, and eastern Europe remain as yet undeveloped.
- Macadamias currently represent around 2% of the world trade in tree nuts. As both awareness and production increase, the Australian Macadamia Society predicts continued growth in the industry.

MARKETS: PRESENT AND FUTURE

- Over 30% of Australian macadamias are sold in-shell, mainly to China where consumers favour in-shell product over kernel. They are flavoured and cut to allow hand cracking with a key.
- Approximately 70% of Australian macadamias are sold as kernel. Kernel is processed for snack food lines and as an ingredient in confectionery, cereals, ice-cream and bakery products. There is also a growing market for food oil and beauty products such as moisturisers and hair care.

- The domestic market consumes over 30% of total production, 99% of which is sold as kernel.
- Over 7,000 tonnes of kernel were exported in 2024 and over 20,000 tonnes of in-shell. This represented about 75% of total industry production and had a value of \$226 million.
- Asian markets are showing the greatest growth driven by increasing trade interest and consumer awareness. In the last few years new market development campaigns have supported the product in China, Taiwan, Korea and India.
- Consumption of macadamias is increasing in India and this market is expected to grow significantly over the next 5 years.
- Promotion of health benefits is a support driver of demand and, combined with new market penetration, is expected to underpin further industry growth.
- Consumer insights research indicates there is considerable opportunity to leverage macadamias' unique attributes to elevate products and brands and remove barriers to consumption.

COMPETITIVE ADVANTAGES

- Macadamias are the only Australian native food plant to be widely traded internationally.
- Australian farms and processors have high product standards, with a demonstrated capacity to produce superior kernel.
- Through the Australian Government's National Residue Survey, the Australian macadamia industry can demonstrate 25 years of 100% compliance with all relevant standards.
- There is a strong financial commitment to domestic and export market development and on-farm research funded by a compulsory grower levy on production. The industry currently spends about \$2.2 million annually on research and development and around \$2.5 on marketing efforts.
- Australia holds the only natural germplasm resources for macadamias and has spent over \$10 million over the last ten years on a comprehensive breeding program. The first new varietal releases from the program occurred in 2018, and early indications are that yield increases of 30% are possible.
- The industry has a strong representative body, the Australian Macadamia Society, which is driving further industry and export development.

Pecans

Production of Australian pecans is set to continue over the next decade with more plantings and trees reaching maturity. The crop is counter-seasonal to the northern hemisphere so fresh Australian pecans can be shipped into major markets in the pre-Christmas season and, importantly, in time for the Chinese New Year.



PRODUCTION AREAS

- The majority of the Australian pecan crop is produced under irrigation in the Gwydir Valley, east of Moree in northern inland New South Wales.
- Smaller scale production in New South Wales extends from the Hunter Valley and Nelson Bay on the Central Coast, to the Mid North Coast near Kempsey, and the North Coast around Lismore, and Tamworth.
- Pecans are also grown in Central Queensland around Mundubbera and Eidsvold, in the Southeast in the Lockyer Valley, and south to the NSW border.
- Small plantings also exist in South Australia and Western Australia.

CURRENT PRODUCTION

- The area under pecan orchards nationally is currently 2,165ha producing approximately 3825 tonnes nut-in-shell (1900 tonnes of kernel equivalent).
- With pecan trees taking 10 years or more to reach full production there is a substantial lag time before new plantings impact crop size. After a long period of stagnation, production increases are now happening.

- Global production remains concentrated in US and Mexico which together account for 87% or more of the world crop. South Africa continues to expand production (currently at about 8% of global production) with small but significant crops also to be found in Central and South America.

INDUSTRY POTENTIAL

- The 'Trawalla' orchards, established on an original 700ha by the Stahmann family in the early 1970s and further expanded in the years since, remains the major large-scale orchard in Australia. A number of new, smaller orchards have been planted in recent years and are now adding to production figures.
- A further 430ha, representing these new orchards, together with recent plantings by Stahmann Webster, will result in an increase in production by 2030 to 4600 tonnes (nut in shell)/2300 tonnes (kernel). More pecan developments are expected in coming years, by both existing growers and new entrants to the industry, further increasing future production.
- Pecans are extremely long-lived and remain highly productive for more than a century, making them a genuine long-term investment.
- Given the long-term nature of the industry, taking 10 years before trees reach full production, orchards are developed with sustainability initiatives in mind. The use of underground irrigation and PLC-monitoring systems maximises water use efficiency. Increased biosecurity protocols also reduce the risk of crop loss.
- The impacts of climate change have resulted in improved crop monitoring to minimise loss in extreme climate events.
- Ever-increasing input costs have resulted in farmers adapting to reduce these costs to maintain profitability. The use of solar systems for power generation, targeted chemical applications, and computer-monitored irrigation are some of the initiatives operating.
- New orchards are trending toward closer tree spacings from the standard 200 trees/ha up to 360 trees/ha to maximise production and reduce the overall footprint of the orchard while still maintaining yield.
- An increasing number of orchards are becoming Organic Certified.

MARKETS: PRESENT AND FUTURE

- The bulk of Australian production is sold as kernel for domestic consumption with distribution split between retail and manufacturing channels.

- Stahmann Webster operates Australia's largest pecan processing plant in Toowoomba, Queensland, from which it supplies in-shell and kernel products to domestic and international markets. There are a number of other smaller processors entering the market, predominantly focussing in the Organic and Regenerative Farming space supplying domestic markets.
- Australian pecan kernel exports find their way to all corners of the globe, from North America to Europe, the Middle East and East Asia.
- Australian pecan exports are predicted to increase, given the increase in tree maturity and production, however tariffs may curtail exports in the shorter term. Export value in 2024 was \$4.6m (from a total production of \$23m), expected to rise to \$6m in 2030.
- Pecans constitute less than 5% of world tree nut trade and their consumption is still mainly concentrated in the US, where they are a native nut. However, demand in Asia, Europe and the Middle East is growing steadily. As a result, the pecan market has been strong in recent years, especially since the entry of China into the world market in the early 2000s.
- Pecans have many marketable health benefits, among which their exceptionally high level of antioxidants (one of the highest of all-natural food products) is most noteworthy.
- The Nuts for Life campaign continues to play an important role in bringing such benefits to the attention of Australian consumers, and it has been influential in continuing consumption growth in Australia.

COMPETITIVE ADVANTAGES

- Australian pecans are harvested in the northern hemisphere off-season meaning that fresh Australian product can be shipped into major markets in the pre-Christmas season and, importantly, in time for the Chinese New Year.
- The Australian pecan industry has been fortunate to remain free from troublesome scab disease which blights much of the production in the US.
- Innovative production techniques mean that the bulk of the Australian crop is grown without the use of chemical pesticides.
- Australia's clean and green image is underpinned by the robust food safety regimes required in Australia that are validated by internationally recognised QA systems. As a result, there is strong interest in Australian pecans by a health-conscious middle class that is increasing, particularly in our Asian region.



Pistachios

Australian consumption of pistachios in 2024 was 5,500 tonnes in-shell, having increased from 3,200 tonnes in 2010. This is in line with a global trend of increased plant-based food consumption in the last decade, including nuts, and the growing acceptance of the benefits to human health of nut consumption.



PRODUCTION AREAS

- The major pistachio production areas are along the Murray River Valley between Swan Hill in Victoria and Waikerie in South Australia. Further plantings are in Pinnaroo in South Australia, central west Victoria and the Riverina in NSW. There are a small number of growers in central New South Wales, southern Victoria and Western Australia though these only currently produce small yields.
- A large-scale commercial processing facility is located at Robinvale in Victoria, with a second facility built on the same site in 2024. This second plant can be expanded for the production from trees already planted during the next decade. There are also several small-scale processing plants in the production regions.
- There are 55 pistachio growers currently producing nuts. The industry includes a mix of farm sizes from 5 to 400 ha.

CURRENT PRODUCTION

- The total area under Australian pistachio production in 2024 was 3,000 hectares with a production of 4,400 tonnes. This compares with the combined production from the three major global producers (US, Iran and Türkiye) of approximately 1.3 million tonnes, US being the largest single producer of 250,000 ha currently planted and with a projected 2025 production of about 750,000 tonnes.
- Due to the alternate bearing production of pistachios, 2025 production was approximately 3,000 tonnes (off year).
- The industry is expanding, with new plantings of up to 250 hectares per annum over the next five years.
- By 2030, the area under pistachio production is expected to increase to 4,500 hectares, producing a crop of 12,000 tonnes in-shell for a farm gate value of \$110 million.
- Pistachios are an attractive crop because of their hardiness in drought conditions, tolerance of poor soil and water, long tree life and resistance to common orchard pests and diseases.
- Improved orchard management and quality processing techniques have established a profitable, expanding and sustainable industry in Australia.
- Pistachio production in Australia is fully mechanised, requiring minimal labour and ensuring international competitiveness.
- The established commercial processing and marketing facility in Robinvale provides a mechanism for standardising product quality and maximising returns to growers.
- There has been further investment in the Robinvale processing plant to accommodate the increase in production with an ongoing commitment for further investment as the crop continues to expand.

MARKETS: PRESENT AND FUTURE

- The demand for pistachios is increasing globally and in Australia because of increased awareness of the health benefits of including nuts in the daily diet.
- Pistachios are mainly consumed as a snack food, which is a market sector that is expected to continue to grow.
- Consumption of healthy snack foods is increasing in tandem with disposable incomes.

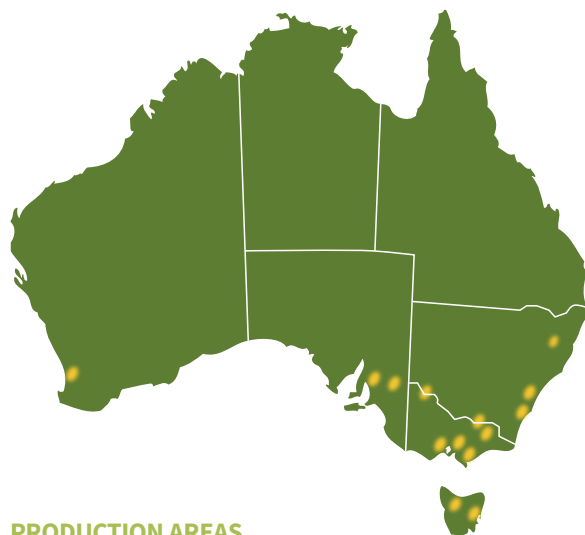
- The market for pistachio kernels in the baking and food services sectors continues to expand steadily.
- In 2024, Australian consumption of pistachios was 5,500 tonnes a year in shell. We expect domestic production to regularly exceed domestic consumption within a few years.
- Exports of Australian pistachios are set to increase rapidly over the coming years.

COMPETITIVE ADVANTAGES

- The reputation of the Australian brand for fresh food gives a marketing advantage over others.
- Australian pistachios are harvested fresh during the northern hemisphere off-season.
- Our proximity to the Asian markets gives an access and distribution advantage.
- Pistachio crops in Australia are less troubled by pests than they are overseas. Lower chemical use reduces the cost of production and facilitates the clean, green image that the industry presents.
- Over the past 25 years the Pistachio Growers' Association Inc has led the development and administration of a wide range of research and development projects funded by industry and matching funds from the Australian government through Hort Innovation. This has enabled world quality research to be undertaken, particularly related to the Australian bred variety 'Sirora'. This research is enabling Australian producers to achieve international best practice.

Walnuts

Locally produced walnuts now supply total domestic in-shell demand, while demand is strong for good quality Australian walnuts in export markets, with about 40 – 45% of Australia's walnut production currently being exported.



PRODUCTION AREAS

- The Australian walnut industry has grown significantly in recent years due to growth in the establishment of large-scale commercial plantings. Major production areas are on the Riverina (near Griffith and Leeton) in New South Wales, the Goulburn Valley near Shepparton, the Murray Irrigation area near Kerang and Swan Hill in Victoria and near Manjimup in south-west Western Australia.
- Small scale orchards are scattered in the Ovens Valley, Gippsland and Central region of Victoria, regions within Tasmania, Southern Highlands and Central Tablelands of New South Wales and the Adelaide Hills and Riverland regions of South Australia.
- The Australian industry is a mix of small, older orchards and new, more extensive orchards. Most older orchards are family operations, with the majority of larger cultivations being managed through corporate investment structures.

CURRENT PRODUCTION

- The production of Australian walnuts in 2024 was in excess of 5,850 tonnes of kernel (12,100 tonnes in-shell). Farm-gate value was \$41 million and the export value approximately \$7million.
- Over 4,000 hectares representing in excess of 1.2 million mature

REFERENCES

1. Hort Innovation Statistic Handbook...2023/24

and developing walnut trees were under cultivation in 2024. This number is expected to rise to 4,300 ha by 2023 as existing growers expand their orchards and new growers enter the industry. This expansion is expected in both existing and new regions.

- Stahmann Webster is Australia's largest walnut grower, owning and/or managing more than 3,000 ha of orchards. When mature, these orchards are expected to produce over 9,000 tonnes of kernel (18,000 tonnes in-shell) per annum.
- There are small areas of organic production mainly in Victoria and Western Australia.

INDUSTRY POTENTIAL

- Investment in new orchard establishment continues through both current enterprises and new entrants. Orchards established in the last five years have provided a firm base on which to further develop the industry.
- Investment in new processing facilities continued with a new facility built at Tatura, Victoria, in 2020 and operational for the 2021 season. This added additional processing capacity to manage future increases in production particularly in Victoria.
- New varieties and improved propagation, along with better orchard management and irrigation techniques have reduced time to bearing and increased nut yield.
- Australia is in a favourable position for walnut production across the southern hemisphere because of the suitability of climatic conditions, water, soil types and topography and capital raising ability.
- Factors that encourage investment in Australian walnut production include:
 - solid sustained growth in consumption, largely driven by the increasing awareness of the health benefits of walnut consumption;
 - the absence of most walnut pests and diseases in Australia;
 - the fact that walnuts are wind pollinated; and
 - continuing strong global demand for walnuts.

MARKETS: PRESENT AND FUTURE

- Annual domestic consumption of walnut is currently 600-800 tonnes in-shell and 4,900 tonnes of kernel (9,800 tonnes in-shell equivalent).

- Locally produced walnuts now supply total domestic inshell demand. Australian in-shell walnuts are sought by the domestic market because of their superior flavour and freshness compared to imported product.
- Most in-shell walnuts are sold through fresh produce markets and farmers markets. Walnuts are also sold through major retail chains and into the bakery and confectionery industries.
- Demand for kernel is increasing as consumers move towards year-round kernel consumption rather than seasonal walnut in-shell consumption.
- Several cracking facilities are currently operating, one of which is a state-of-the-art cracking facility at Leeton in New South Wales, one in Tatura, Victoria and another in south-west Western Australia.
- Demand is strong for good quality Australian walnuts in export markets, with about 40 – 45% of Australia's walnut production currently being exported.
- Global growth in demand for walnuts has been maintained since 2011. World consumption has been increasing at a steady rate of around 4% per year. This is expected to continue with the continuing awareness of the health benefits of nut consumption. Markets are also increasing due to growing middle classes consuming more healthy foods. Domestically, appreciation for locally grown foods has increased, helped along the way by new 'country of origin' labelling laws.
- For the year ending June 2024, Australia exported 865 tonnes of in-shell walnuts (87% of walnut exports) and 127 tonnes of kernel walnuts (13% of exports), while importing 17 tonnes of in-shell walnuts (<1% of imports) and 5,400 tonnes of kernel walnuts (100% of imports).

COMPETITIVE ADVANTAGES

- Australia is a reliable exporter of off-season walnuts into the northern hemisphere.
- Although not immune to the impact of climate related challenges, Australia is free from many recognised walnut pests and diseases affecting other countries, so chemical use is low in Australian walnut production.
- Free Trade Agreements have also assisted with some growth into participating countries, breaking down some of the barriers to new market development.



“Just in the last five years the industry has seen significant new plantings across all tree nuts, particularly in almonds and macadamias. With a lead time of 5-10 years, this expansion is likely to push the farm gate value to well over \$2 billion by 2030.”

