STRATEGIC PLAN

AUSTRALIAN
PISTACHIO INDUSTRY

2027-2031

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PREPARED BY: Pistachio Growers' Association Inc

DATE: 22 October 2026

VISION

"A highly profitable industry that is sustainable and rewarding for existing growers and attractive to new growers."

ASPIRATIONS

By 2031, the Australian Pistachio Industry will:

1. continue to be informed, innovative, profitable and environmentally sustainable,
2. continue to produce and market consistently high-quality pistachios
3. continue to meet a strongly expanding market demand
4. expand from the high-level focus on the domestic market to also succeeding in the export market
5. be effectively supported by a well-resourced and governed Growers' Association.

MISSION STATEMENT

"To produce sustainable, profitable yields of high-quality pistachio nuts that satisfy markets in Australia and overseas."

OBJECTIVES

1. Maximise sustainable yields of high-quality pistachio nuts from Australian orchards through improved production tools.
2. Maximise returns to Australian pistachio growers by constantly improving efficiencies in the distribution channel from the orchard to the consumer
3. Maximise consumer perceptions of Australian pistachio nuts by constantly improving appearance and taste of Australian pistachios and promoting health benefits in the market place.
4. Maintain an effective Pistachio Growers' Association to support growers in the Australian pistachio industry to profit from the sustainable, high-quality nuts that satisfy and build on market demand.

KEY RESULT AREAS

1. Maintained high profitability of Australian pistachio nut producers.
2. Maximised yield, size, appearance and taste of Australian Pistachio nuts.
3. The availability and adoption of best practice, sustainable production methods to growers.
4. The Pistachio Growers' Association delivers:
   - Research undertaken by PGAI or invested with research partners using voluntary grower levies and other funding that delivers replicable publishable results on increasing nut yield and quality and /or supply chain efficiencies.

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- Communication and extension activities to growers on best practice that result in high levels of adoption
- Collaboration among growers that drives adoption of effective best practices
- Representation and advocacy to ensure the industry has access to the tools, resources and opportunities needed to be sustainable and profitable.
- Efficient and effective governance practices that provide excellent return on investment for grower voluntary levies.

RATIONALE

Australian pistachios nuts will remain under competitive domestic market pressures from imported nuts from Iran and California.

The Australian Pistachio Industry needs to:

1. constantly improve the yield and quality of Australian pistachio nuts to match and exceed world standards and implement tools to achieve this throughout the supply chain.
2. adopt and maintain sustainable production systems
3. maintain pest and disease management to ensure yields and quality are maintained and improved.
4. continue to develop and implement innovative processing and marketing opportunities.
5. increase consumer awareness of the health benefits of pistachios.
6. expand and service the domestic market for Australian pistachio nuts.
7. identify and service niche export markets that will value the fresh taste of Australian pistachios.

As the Australian pistachio industry structures and R&D funds become more predictable and sustainable, the Industry will continue to:

1. attract new growers and expand the production base.
2. maintain a strong grower-based industry association.
3. maintain funding to support Pistachio Growers' Association Inc R&D project investments.
4. remain a cooperative industry that readily exchanges information between its members

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INDUSTRY KPI's

The following broad industry Key Performance Indicators (KPIs) will be achieved from the implementation of this Strategic Plan.

1. Growers have the knowledge and tools they need to effectively and profitably manage their orchards
2. The majority of mature orchards achieve an average yield of at least 7.5 kg/female tree (3,000 kg/ha for a 416 tree/ha orchard)).
3. Nut quality is optimised by
    - an increase in nut size.
    - a reduction in dark staining.
    - a reduction in the percentage of blanks.
    - a reduction in insect damage
4. New plantings that expand the industry base

BACKGROUND INFORMATION

History

Commercial pistachio growing commenced in Australia in the early 1980's following exploratory research and a successful breeding program by CSIRO at Merbein in NW Victoria. The new variety *Sirora* was released in 1980. A range of male selections that flower synchronously with *Sirora* were also made available to the young industry by CSIRO. When grown grafted to compatible rootstocks, which were identified by CSIRO and the industry, *Sirora* and the male selections have enabled the industry to develop within the constraints of the climate and soils of the River Murray valley, where most large orchards are now located.

Current Farming Situation

In 2026 there were about 60 pistachio growers with a total area in production of about 1,600 hectares. There were also about 25 new growers with orchards yet to produce. There is now a total of about 3,500 ha of bearing and non-bearing trees, an increase of 1,300 ha since 2020.

The industry has developed a successful growing model for Australian conditions. The climate and soils have proven satisfactory for pistachio nut production.

Orchards are usually >10 hectares, the minimum size for a viable orchard. There are a range of orchard sizes with the largest now being about 450 ha.

New plantings are proceeding at about 250 ha per annum.

Production

This Plan addresses the production and marketing of dried pistachios from 2027 to 2031.

Current production averaged 3,600 tonnes per annum across the 2025 - 2026 off/on crops. The expected production as the new orchards come into production is shown in Chart 1. Trees already planted and ordered from nurseries for the next three years will produce about 12,000 tonnes in 2030.

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There is also a small market for fresh pistachios fruit (nuts in fleshy hull). 2026 sales are estimated at 20 - 30 tonnes from 10 to15 small growers selling independently of each other though the fresh fruit & vegetable markets.

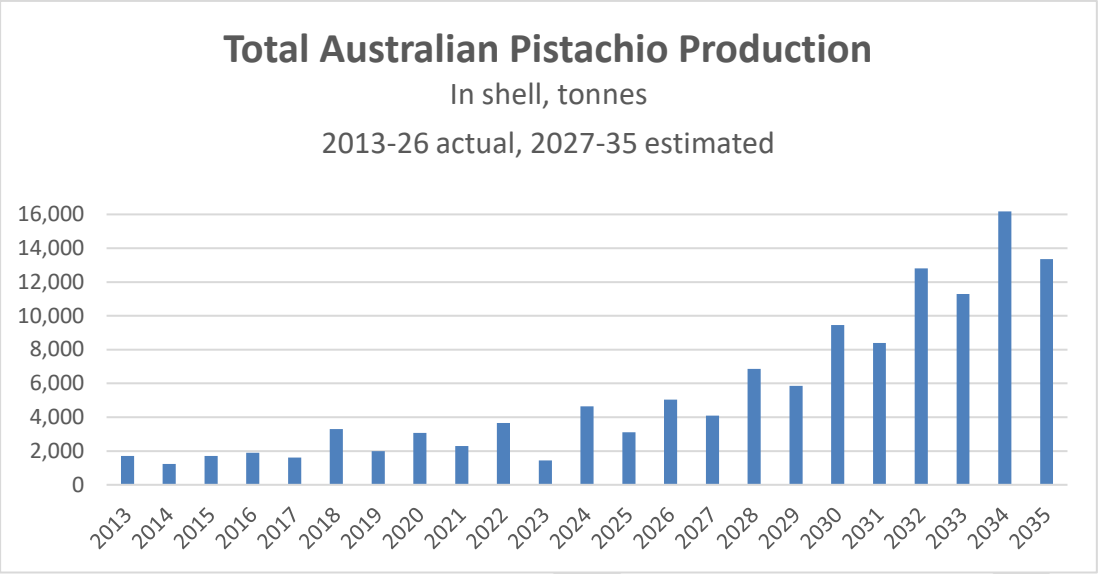

Chart 1: Total Australian in-shell pistachio production 2013-2026, with projections from 2027-2035. Source: APPC records and industry information.

Production Efficiency

Australian yields need to improve. Mature Australian orchards now achieve an average of about only 2,500kg/ha, over the 2-year on/off cycle, peaking at over >6,000kg/ha in an on-crop year.

Further improvement is possible – the best Californian orchards produce over 6,000kg/ha in an on-crop year. Good Californian orchards average 3,500kg/ha over the on/off cycle.

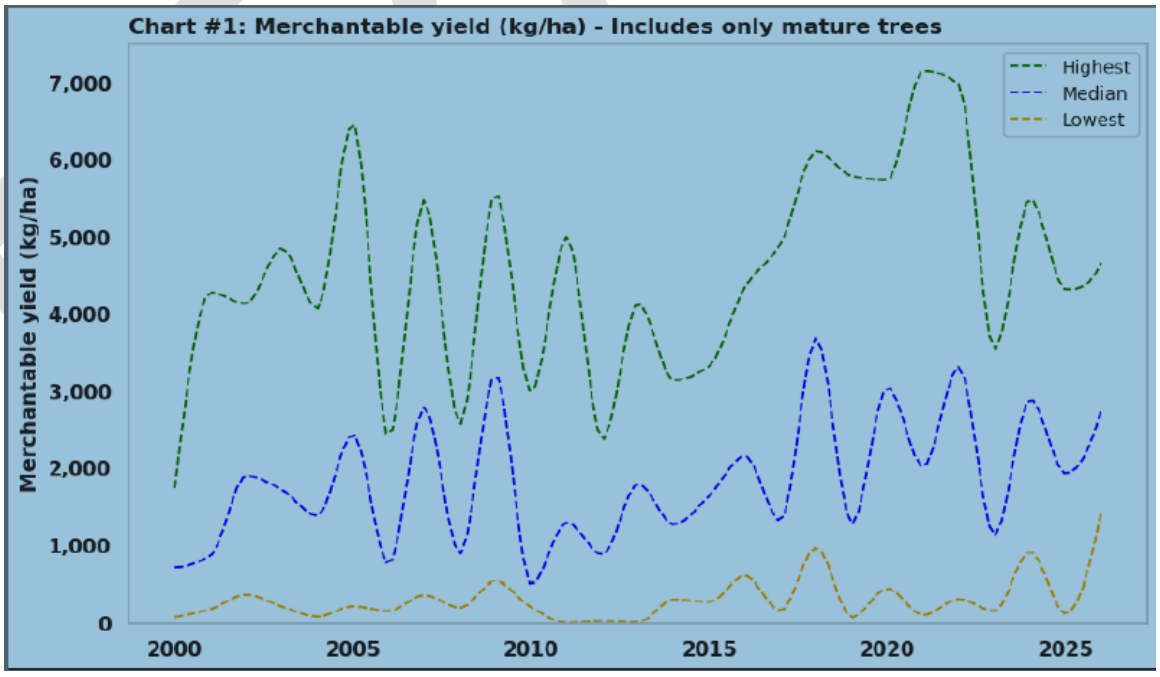

Chart 2: Maximum, median and minimum merchantable yield (kg/ha) by mature trees on Australian pistachios farms 2000-2026. Source: 2026 PGA Benchmark Report.

Median yields have been flat at about 2,500kg/ha for the last decade, well below the PGA KPI of reaching a median yield of 3,000kg/ha over the on and off crop.

Market

Most pistachio production world-wide is directed at the consumer snack food market as in-shell. About 85% of the Australian crop is usually sold into the in-shell snack food market. The balance is shelled for kernels.

There is a rapidly expanding ingredient market that is supplied by the kernels obtained by shelling the closed shell and reject in-shells. The Australian *Sirora* variety has relatively few closed shell compared to most other commercial varieties (<10% compared with ~15 - 20% in Iranian and Californian varieties).
In the last two years, the Dubai chocolate phenomenon has driven consumption of pistachio kernels to new highs, increasing the relative price for kernels. The returns to growers for shelling stock is now approaching that from the snack food grades.

2026) Australian consumption is about 5,000 tonnes per annum. This represents a compound growth of about 4.2% per annum since 2000. There is scope for continued growth. The nut heart health message is steadily becoming better known.

From 2028, Australian production is about equal to domestic demand on an in-shell equivalent basis.

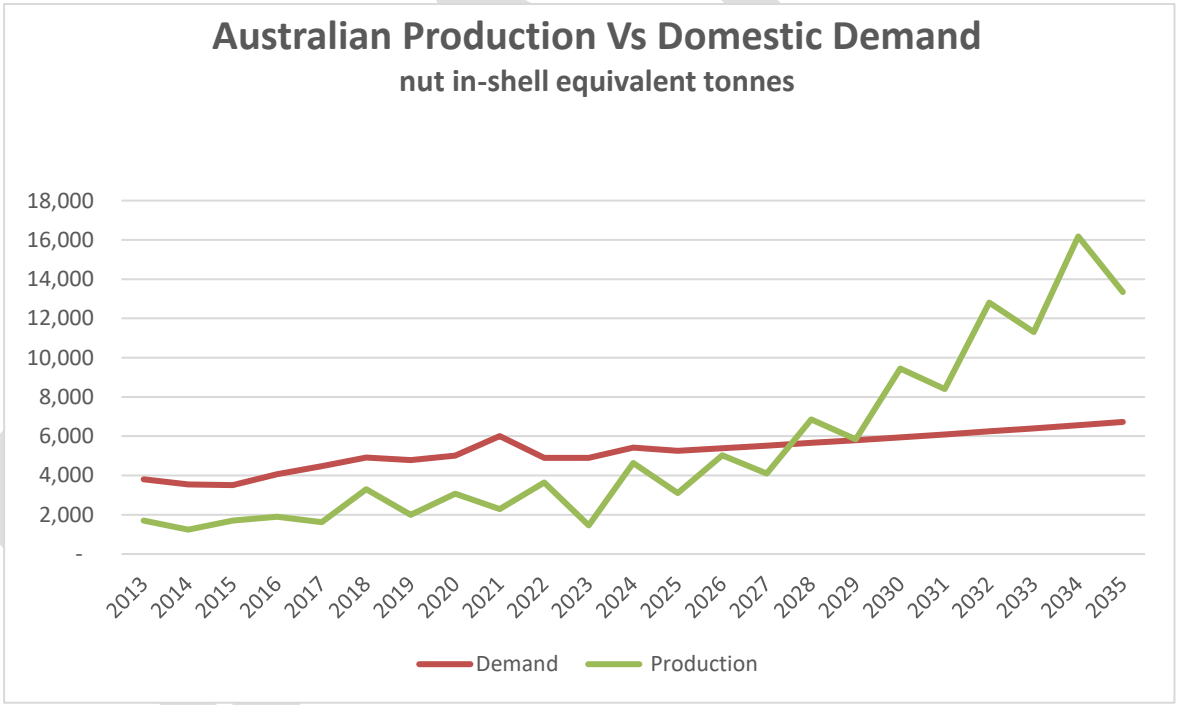

Chart 3: Australian pistachio production relative to domestic demand. Actual data to 30th June 2026; projected 2027-2035. Demand growth is assumed at 2.5% per annum. Source: APPC and Australian Bureau of Statistics. Demand is expressed as nut in-shell equivalent, i.e., the kernel demand is expanded to the original in-shell weight that produced those kernels Demand is the total demand being supplied by both imports and domestic production.

Australian production has been to date directed at the domestic market. Australian domestic prices reflect the landed cost of imported pistachio nuts and therefore the return to growers usually exceeds what could be achieved through exporting the Australian product to Europe or Asian markets. The recent tariff distortions have provided export opportunities to some markets at better than domestic parity.

AUSTRALIAN PISTACHIO INDUSTRY

OVERALL INDUSTRY STRATEGIES

2027 to 2031

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OVERALL AUSTRALIAN PISTACHIO INDUSTRY KEY STRATEGIES AND ACTIONS

Strategy 1	MARKET OPPORTUNITIES
Actions	1.1 Further develop the domestic market sector 1.2 Promote and market quality Australian nuts to the consumer 1.3 Maintain the highest food quality standards. 1.4 Promote Country of Origin Labeling to maximise the value of high-quality Australian pistachios 1.5 Ensure that the health professionals and other key influencers promote pistachios as a part of a healthy diet 1.6 Identify potential niche export markets that may provide price premiums for Australian pistachios. 1.7 Maintain a cooperative and coordinated marketing strategy across the industry 1.8 Expand the value adding opportunities
Outputs	• Market strategy for prioritised market sectors based on ongoing market intelligence • Confidential information that supports the development of new market opportunities • Relevant data packages for the industry • Consumer research data to guide product development • Price premium for Australian grown pistachios in domestic and export markets • A range of new pistachio products
Industry Outcomes	• Increased domestic consumption of Australian pistachios. • New and existing market sectors for Australian pistachios. • Customer confidence in Australian pistachios maintained and increased • Customers with access to a range of new, high value products.

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Strategy 2	PRODUCT VALUE
Actions	2.1 Maintain accredited growers and processors 2.2 Maintain and promote quality supply chain management 2.3 Undertake regular economic benchmarking across the Australian pistachio industry
Outputs	• Information packages and educational materials • A quality certification program using 3rd party quality auditors
Industry Outcomes	• Australian pistachios maintain their high-quality reputation in the Australian domestic market • Minimum quality standards and consistent protocols so that product meets specifications

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Strategy 3.	EFFICIENT AND SUSTAINABLE PRODUCTION
Actions	3.1 Review nutritional requirements and standards for pistachio trees under Australian conditions. 3.2 Promote optimum orchard nutrition 3.3 Assist producers to manage climate variability 3.4 Review and promote water requirements, application and availability to achieve water use efficiencies 3.5 Implement effective pest and disease management 3.6 Promote efficient and effective nut harvesting, hulling, drying and storage 3.7 Establish, promote and benchmark efficient production costs to reduce unit production costs 3.8 Ensure the development and implementation of best practice mechanisation 3.9 Identify and promote suitable varieties and rootstocks to increase diversity and resilience as well as potentially being able to create broader market appeal 3.10 Summarise key pest and disease knowledge and determine existing knowledge gaps

Outputs	• Best practice and technologies for:
	  ○ water use,
	  ○ pest and disease management
	  ○ nutrition
	• Best practice soil health management technologies
	• Precision horticulture systems
	• Technologies to enable high moisture pistachios to be efficiently hulled and dried with no detriments to nut quality
	• Report on assessment of pistachio production from climate variability and climate change scenarios
	• Reviewed and evaluated alternate uses for processing waste, including financial assessment of alternatives
	• Rootstock and cultivar propagation protocols
	• A secure pistachio germplasm repository
	• A source of highest health status, true-to-type budwood.
	• Importation and trial of new varieties and rootstocks
	• Pest management information in appropriate formats for grower use

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Industry Outcomes	• Increased and sustainable yield gains for Australian pistachio orchards from improved, efficient production techniques and/or new orchards. • Industry average yield increased (average derived from industry statistics) • Water use efficiency enhanced meeting recognised industry and horticultural best practices • Yield losses from pest and disease pressures reduced • Improved processing efficiency • Industry practices enhance improvements in soil biology • Australian Pistachio Industry's carbon and environmental footprint reduced • Sourcing world leading rootstocks and varieties to build on the current Australian the rootstock/variety options • 7.5 kg/female tree {3.0 tonnes dry, in-shell nuts per hectare (averaged across 2 seasons) achieved by the majority of Australian commercial growers

Strategy 4.	**SUPPORTING OPERATING ENVIRONMENT** **(PISTACHIO GROWERS' ASSOCIATION AND COLLABORATORS)**
Actions	4.1 Establish and undertake regular reviews of an Australian Pistachio Industry Strategic Plan 4.2 Establish and maintain an annual Research and Development investment plan. 4.3 Promote the adoption of effective Food Safety Programs in orchards and throughout the supply chain 4.4 Develop and maintain effective relationships with Government and Regulators 4.5 Regularly undertake industry data collection to underpin industry statistics 4.6 Undertake appropriate Industry advocacy as and when required 4.7 Develop, maintain and promote effective industry biosecurity by regularly updating the Nut Biosecurity Plan to determine exotic pest and disease risks and developing protocols to address them 4.8 Develop and implement on-farm biosecurity and orchard sanitation programs

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Outputs	• Strategic Plan for the Australian Pistachio Industry reviewed in Years 2 and 5 • Project prepared for all priority strategies within each objective • R & D annual investment plan • A best practice management program that includes critical control points and guidelines for managing biological risks across the entire supply chain • Biosecurity Plan for the pistachio industry • Contribute pistachio exotic pest and disease surveillance and reporting information to a national database • Maintain and publish accurate Industry statistics • Adequate industry resources and capacity to support future industry development and expansion
	• Industry endorsed Strategic Plan and consensus on strategic direction and support for future industry growth as detailed in the Pistachio Strategic Plan
Industry Outcomes	• R&D investment aligned with industry growth and strategic goals. • The R & D projects commissioned achieved a strong Return on Investment • Food safety issues addressed and minimised • Australian pistachio nuts have a positive food safety reputation • A more knowledgeable and biosecure pistachio industry • In any incursion occurrences, damage is minimised

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Strategy 5.	**TECHNOLOGY TRANSFER** **(PISTACHIO GROWERS' ASSOCIATION)**
Actions	5.1 Develop and maintain effective extension and technology transfer 5.2 Maintain Best Practice Grower Groups 5.3 Develop and maintain effective and efficient communication processes 5.4 Maintain and enhance a strong human resource (members) base 5.5 Support ALL growers – small and large 5.6 Survey stakeholders to evaluate technology transfer
Outputs	• Extension publications, products and services and diverse learning opportunities (including fact sheets, field days, workshops and training sessions) • Grower information exchange • Website that holds pistachio research reference material • Project status and output updates • Final project reports on the PGAI website • Stakeholder survey result summaries • Analysis of technology transfer • Training programs for industry stakeholders • Engagement with international and Australian experts
Industry Outcomes	• Growers and industry have access to the tools, resources and opportunities that they require to be sustainable and profitable. • High level uptake of R&D outcomes by industry • Enhanced skills and Industry capacity and capability • Growers experience benefit from their voluntary levy contribution

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Strategy 6.	**MANAGE THE INDUSTRY EFFECTIVELY** **(PISTACHIO GROWERS' ASOCIATION)**
Actions	6.1 Maintain strong and effective industry leadership 6.2 Maintain a well-resourced industry organisation 6.3 Represent and develop Biosecurity procedures for Industry 6.4 Maintain a strong voice on Industry Issues 6.5 Collaborate with other like Industries as deemed necessary 6.6 Ensure the organisation and industry remain legally (and regulatory) compliant 6.7 Efficient and effective governance practices that provide excellent return on investment for grower voluntary levies.
Outputs	• Expanded communication initiatives (including website updates and e-newsletters) • Annual communication effectiveness survey • Informed decision-making throughout the pistachio supply chain through access to timely and relevant information • Active member of Australian Nut Industry Council (ANIC) and NFF Horticulture Council (through ANIC membership)
Industry Outcomes	• Higher proportion of stakeholders accessing current information (e.g., From the PGA's website) • Informed and engaged stakeholders across the value chain • Conducive environment to pursue sustainable, profitable pistachio farming in Australia • Growers experience high value from their voluntary levy contribution

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AUSTRALIAN PISTACHIO INDUSTRY

KEY R, D & E INVESTMENT STRATEGIES

2027 to 2031

PISTACHIO GROWERS' ASSOCIATION & COLLABORATORS

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AUSTRALIAN PISTACHIO INDUSTRY KEY R, D & E STRATEGIES AND ACTIONS

Strategy 1	**Nut Quality**
Actions	1.1 Develop and maintain programs that ensure quality nuts from producers 1.2 Work to mitigate nut staining 1.3 Manage pests and diseases 1.4 Assist in the management of aflatoxin 1.5 Promote quality, consistent supply chain management 1.6 Determine and promote appropriate nut harvesting and storage techniques 1.7 Work to minimise the occurrence of blank nuts (parthenocarpic fruit) 1.8 Achieve appropriate nut size, taste and colour to satisfy consumer preference
Outputs	• Replicable, publishable research that underpins recommendations to increase nut quality • Communication and extension activities to growers on best practice • Sufficient know-how and support for the production of highest quality nuts by the majority of growers • Increased industry overall production of quality pistachio nuts
Industry Outcomes	• High levels of adoption of best practice for producing high-quality nuts • Australian Pistachio Industry maintained its high-quality reputation • Continual improvement in appearance and consumer appeal of Australian pistachio nuts to meet and exceed consumer expectations. • Higher grower returns through increased overall production of highest quality pistachio nuts

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Strategy 2	Pest and Disease Management
Actions	2.1 Determine nut stain triggers and implement management and control programs 2.2 Investigate fungal disease epidemiology and triggers to advance implementation detail within management and control programs 2.1 Develop, maintain and promote monitoring, management and control programs for *Carpophilus truncatus*, carob moth, heliothis, locusts and other insects 2.2 Ensure appropriate and legally permitted crop protection products are available 2.3 Investigate aflatoxin triggers and implement management and control programs 2.4 Refine, implement and extend Integrated Pest and Disease Management (IPDM) and Biosecurity plans
Outputs	• Replicable, publishable research that supports best practice IPDM • Communication and extension activities on best practice IPDM • Required crop monitoring and protection knowledge, products and other tools are available to producers • National pistachio exotic pest and disease surveillance and reporting network • Pistachio Biosecurity Plan • On-farm IPDM and Biosecurity plans for pistachio growers
Industry Outcomes	• High levels of adoption of best practice IPDM and biosecurity practices • Australian pistachios nuts maintained their high-quality reputation • Continual improvement in appearance and consumer appeal of Australian pistachios nuts. • Industry protected from endemic and exotic threats

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Strategy 3	Rootstocks and Scions
Actions	3.1 Ensure premium scions are available to producers 3.2 Ensure suitable rootstocks are available to producers 3.3 Promote nursery programs such that the highest health status budwood and/or trees are available 3.4 Ensure access to appropriate pest and disease resistant rootstocks 3.5 Maintain the current industry germplasm collections 3.6 Collate pollination information including timing as it relates to nut quality 3.7 Maintain rootstock trials at relevant industry/departmental repositories 3.8 Evaluate performance and viability of alternative varieties to Sirora, including Kerman, as well as Golden Hills and Lost Hills (females) and Randy and Tejon (males) under Australian conditions
Outputs	• Security of current industry germplasm repository • Well-structured nursery trees free of pests and pathogens. • Budwood programs that ensures the supply of clean budwood to the industry • Replicable, publishable research that informs viability of alternative varieties • Agreed orchard management program established and implemented for alternate varieties in Australia • Communication and extension activities on rootstock and scion options and management
Industry Outcomes	• Australian pistachio orchards remained highly productive: • Losses from pests and diseases reduced • Improved processing efficiency • The Australian Pistachio Industry has future variety and rootstock options. • Varieties other than Sirora perform up to industry expectations.

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Strategy 4	Orchard Management
Actions	4.1 Determine and undertake effective R, D & E 4.2 Determine, promote and benchmark the implementation of effective and efficient production costs 4.3 Encourage the implementation of best practice 4.4 Determine optimum orchard nutrition and promote appropriate programs to growers 4.5 Assist growers to manage orchards under climate variability 4.6 Ensure industry has access to the required water resources and encourage efficient irrigation 4.7 Establish appropriate tree structure/form for Australian conditions to improve annual yields 4.8 Monitor chill and heat accumulation utilising relevant models 4.9 Promote the utilisation of relevant precision farming techniques 4.10 Determine the Australian Pistachio Industry's carbon and environmental footprint
Outputs	• Best practice technologies for orchard management including nutrition, water use, pruning, pest and disease management • Approved products for use in growing pistachios. • Best practice technologies for maintaining and improving soil health • Report on an assessment of pistachio production against variable climate and climate change scenarios • Annual Chill accumulation reports distributed • Increased capabilities of orchardists to optimise water use to achieve maximum returns • Report on the Australian Pistachio Industry's carbon and environmental footprint
Industry Outcomes	• Sustainable yield gains for Australian pistachio orchards that came from improved, efficient production techniques and new orchards • Achieved target industry yields (derived from industry statistics) • Water use efficiency enhanced meeting industry and horticultural best practice • Losses from pest and disease reduced • Improved processing efficiency • Industry practices enhanced promotion of soil biology • Australian Pistachio Industry's has a sustainable carbon footprint

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Strategy 5	Technology Transfer
Actions	5.1 Maintain industry based and managed technical resources 5.2 Establish and maintain Best Practice Grower Groups 5.3 Develop and maintain effective, efficient communication processes (e.g., technical bulletins, website, manual, grower meetings) 5.4 Maintain a strong Australian Pistachio Industry grower base through membership of the PGAI 5.5 Regularly undertake industry data collection to ensure accurate industry statistics 5.6 Utilise international, national and local specialists/experts
Outputs	• Extension publications, products and services, including fact sheets, field days, workshops and training sessions • Project updates included in newsletters • Final project reports (available on the PGAI website) • Regular survey of stakeholders to evaluate technology transfer • Analysis of technology transfer • Secured and expanded role of the Pistachio Research Field Officer/Technical Officer
Industry Outcomes	• Improved resource use and capabilities through technological solutions and skills development • High level uptake of R & D outputs by industry • Industry capacity enhanced through increased skills development

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Strategy 6	Manage the Industry effectively
Actions	6.1 Maintain strong and effective R, D & E leadership and a strong representative voice on industry issues and needs 6.2 Maintain a well-resourced industry-based R, D & E Committee 6.3 Adopt and maintain an effective, efficient voluntary contribution collection from ALL producers 6.4 Collaborate with other like industries 6.5 Undertake regular economic benchmarking across the Australian Pistachio Industry
Outputs	• Implemented R, D and E components of the Strategic Plan • R&D sub-committee maintained and resourced • Disseminated industry information, data and statistics • Communicated initiatives reaching ALL growers through appropriate mechanisms • Leveraged effective utilisation of resources through participation appropriate and relevant multi-industry projects • Engagement of appropriate resources • Improvement in the overall return on investment (ROI)
Industry Outcomes	• A conducive environment to pursue sustainable, profitable pistachio farming in Australia • Increased supply that satisfied the Australian Retail demand • Efficient and effective governance practices that provide excellent return on investment for grower voluntary levies.

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TABLE 1: SUMMARY OF R&D PRIORITIES DETERMINED BY URGENCY AND IMPACT

	High $ Impact Action will have measurable $$ returns to industry	**Medium $ Impact** Action may have measurable $$ returns to industry	**Low $ Impact** Action unlikely to have measurable $$ returns to industry
High Urgency /Importance Action needed in next 12 months	Fungal diseases Insects: *Carpophilus truncatus* and Carob, Moth, Heliothis and locusts Pruning to mitigate alternate bearing Monitoring chill and mitigate the impact of lack of chill. Communication Growers : Web site Technical information transfer Evaluation and development of alternate varieties, including Kerman, and new American Varieties as well as Iranian and Mediterranean varieties to aid industry resilience	Nutrition requirements for *Sirora* and other varieties Nut size Shell damage Kernel fill	
Medium Urgency/ Importance Action needed within 3 years	Water - When - How much Kernel fill, splitting and blanking	Review and update Sirora Leaf analysis standards Pruning/training *Xanthomonas* Aflatoxin Global warming	

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Low Urgency/ Importance Action needed within 5 years	Alternate bearing	Trees Budwood Source	Export Marketing Marketing fresh pistachios Develop coordinated fresh pistachio fruit market. Investigate the export of fresh pistachio fruit.

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