



All Nuts - Overview

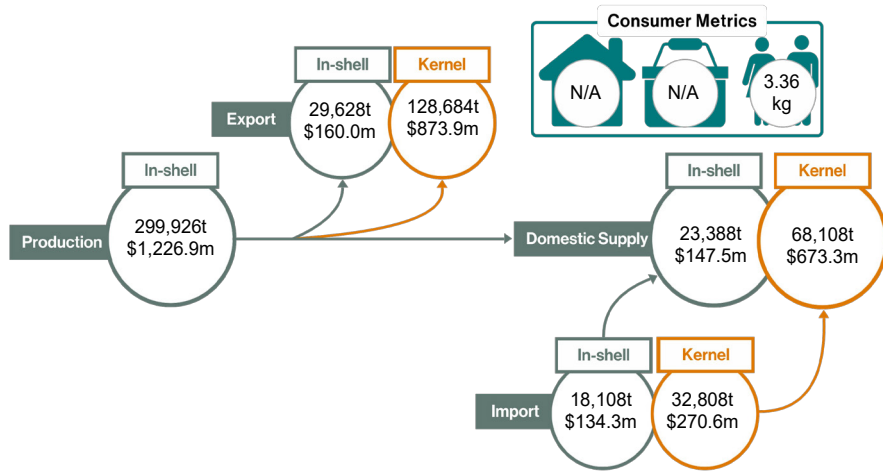


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All Nuts Overview

ALL NUTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: ABS; AC; AUSVEG; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$1,226.9m

299,926t (IS) produced and valued at \$1,226.9m.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (IS t)	282,869	226,208	-20%	299,926	+33%
Production (\$m)	\$1,229.8	\$742.6	-40%	\$1,226.9	+65%
Export Volume (t)	155,729	137,710	-12%	158,312	+15%
Export Value (\$m)	\$1,127.4	\$766.8	-32%	\$1,034.0	+35%
Import Volume (t)	45,560	42,402	-7%	50,912	+20%
Import Value (\$m)	\$383.2	\$354.7	-7%	\$405.0	+14%
Domestic Supply (t)	87,267	77,611	-11%	91,496	+18%
Domestic Supply Wholesale Value (\$m)	\$915.4	\$705.8	-23%	\$852.4	+21%
Domestic Supply per Capita (kg)	3.36	2.95	-12%	3.36	+14%

Note : Trade and domestic supply data for all nuts is the sum of kernel and in-shell volumes.

Sources: ABS; AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

ALL NUTS INTERNATIONAL TRADE



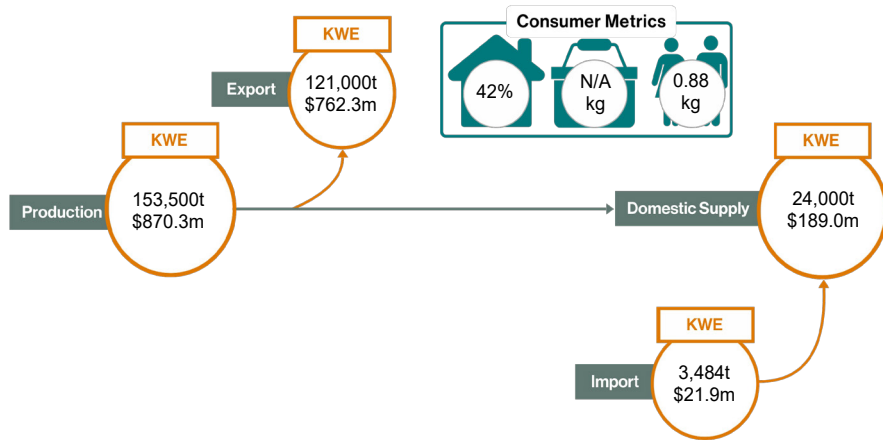


Almonds

Almonds Overview

ALMONDS SUPPLY CHAIN – 2024

Note : Due to the nature of almonds production and processing, the THRUchain approach has not been applied. Almonds are reported in In-Shell (IS) and relate to the 2024 season.



Sources: Almond Board of Australia (ABA); ABS; AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION

\$870.3m

153,500t (KWE) produced and valued at \$870.3m.

CONSUMER METRICS



42%

42% of Australian households purchased almonds.

PER CAPITA CONSUMPTION

0.88kg



in 2024 based on the volume supplied.

	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (KWE t)	140,963	110,707	-21%	153,500	+39%
Production (\$m)	\$866.1	\$533.1	-38%	\$870.3	+63%
Production area (Ha)	60,463	62,414	+3%	64,192	+3%
Export Volume (KWE t)	105,263	106,599	+1%	121,000	+14%
Export Value (\$m)	\$765.1	\$570.3	-25%	\$762.3	+34%
Import Volume (KWE t)	1,139	2,069	+82%	3,484	+68%
Import Value (\$m)	\$7.8	\$11.1	+42%	\$21.9	+98%
Domestic Supply (KWE t)	24,463	24,697	<1%	24,000	-3%
Domestic Supply Wholesale Value (\$m)	\$208.7	\$165.2	-21%	\$189.0	+14%
Domestic Supply per Capita (kg)	0.94	0.94	>-1%	0.88	-6%

Note : This category has had an update on previous editions to ensure up-to-date figures are presented. Trade totals are now calculated from March to February.

Sources: ABA; ABS; AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Almonds Production

MAJOR PRODUCTION AREAS



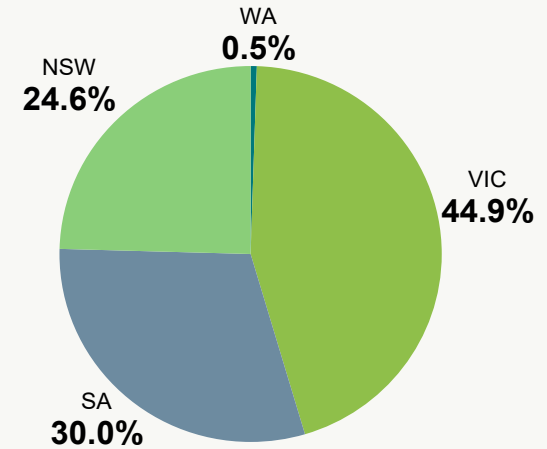
Source: ABA

Almonds are grown in the south of Australia, with the majority of production occurring along the Murray River downstream of Swan Hill. The majority of almonds are cracked and sold in kernel form.

HARVEST WINDOW



2024 ALMONDS PRODUCTION BY STATE



Source: ABA

2024 ALMONDS HARVEST SEASON BY STATE (KERNEL EQUIVALENT)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	68,953								Harvest	Harvest	Harvest	End of Harvest	
South Australia	46,076								Harvest	Harvest	Harvest	End of Harvest	
New South Wales	37,686								Harvest	Harvest	Harvest	End of Harvest	
Western Australia	785								Harvest	Harvest	Harvest	End of Harvest	

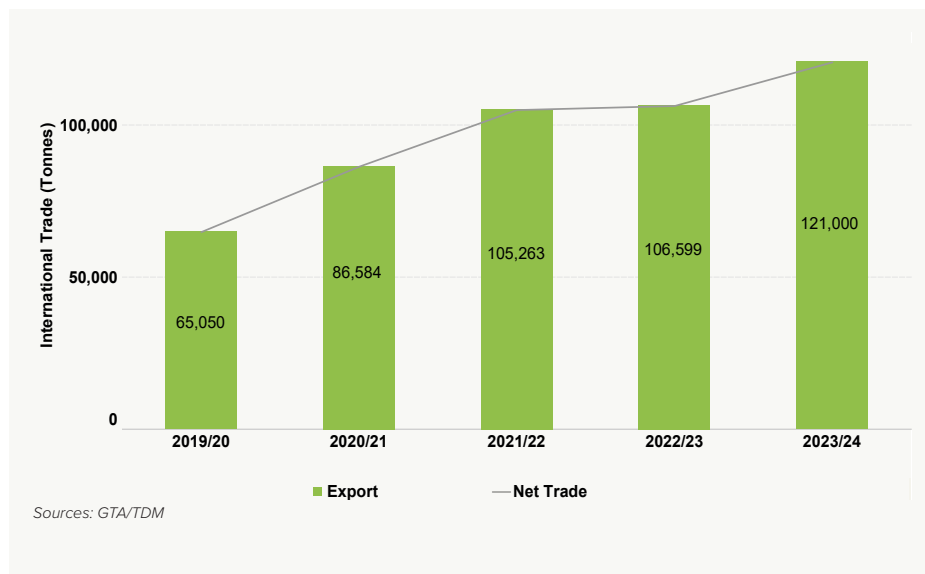
Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: ABA

Almonds International Trade

ALMONDS INTERNATIONAL TRADE

For the year 2024, Australia exported **121,000 tonnes** of kernel weight equivalent (KWE) almonds. Across the almond industry seasonal sales volumes are calculated from March 1 to the end of February the following year. The exports over the last five years are profiled in the graph below, and all information is provided in KWE.



ALMONDS EXPORTS (KERNEL EQUIVALENT)

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
	2022	2023	2024		2022	2023	2024
Victoria	70,582	65,318	-	China	50,848	34,200	-
South Australia	33,356	36,510	-	India	8,993	21,128	-
New South Wales	1,255	4,549	-	Vietnam	8,410	10,428	-
Tasmania	17	11	-	Turkey	6,052	10,545	-
Queensland	50	209	-	Spain	8,642	9,914	-
Other	2	1	-	Other	22,318	20,384	-
TOTAL	105,263	106,599	121,000	TOTAL	105,263	106,599	121,000

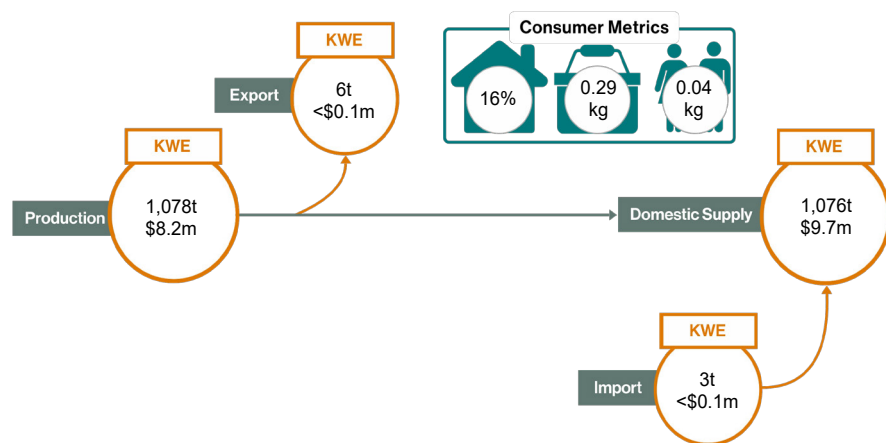
Source: GTA/TDM



Chestnuts


Chestnuts Overview

CHESTNUTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: AC, Chestnuts Australia Inc. (CAI); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$8.2m

1,078t (KWE) produced and valued at \$8.2m.

CONSUMER METRICS



16%

16% of Australian households purchased chestnuts, buying an average of **290g** per shopping trip.

PER CAPITA CONSUMPTION

0.04kg 

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (KWE t)	1,339	1,255	-6%	1,078	-14%
Production (\$m)	\$10.1	\$9.6	-5%	\$8.2	-14%
Export Volume (KWE t)	<1	1	+83%	6	>100%
Export Value (\$m)	\$-	\$-	-	< \$0.1	-
Import Volume (KWE t)	23	2	-93%	3	+90%
Import Value (\$m)	< \$0.1	< \$0.1	-86%	< \$0.1	>100%
Domestic Supply (KWE t)	1,359	1,256	-8%	1,076	-14%
Domestic Supply Wholesale Value (\$m)	\$12.0	\$11.3	-6%	\$9.7	-14%
Domestic Supply per Capita (kg)	0.05	0.05	-9%	0.04	-17%

Sources: CAI; ABS; AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Chestnuts Production

MAJOR PRODUCTION AREAS



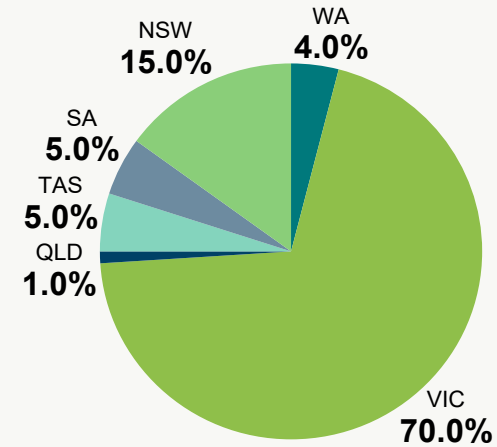
Source: CAI

Chestnuts are grown in the south of Australia, with the majority of production occurring in Victoria. Chestnut production has a strong domestic market focus. Chestnuts are sold in a fresh in-shell form.

HARVEST WINDOW



2023/24 CHESTNUTS PRODUCTION BY STATE



Source: CAI

2023/24 CHESTNUTS HARVEST SEASON BY STATE (KERNEL EQUIVALENT)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	755									Harvest	Harvest	Harvest	End of Harvest
New South Wales	162									Harvest	Harvest	Harvest	End of Harvest
South Australia	54									Harvest	Harvest	Harvest	End of Harvest
Tasmania	54									Harvest	Harvest	Harvest	End of Harvest
Western Australia	43									Harvest	Harvest	Harvest	End of Harvest
Queensland	11									Harvest	Harvest	Harvest	End of Harvest

Availability legend: ■ Harvest ■ End of Harvest ■ None

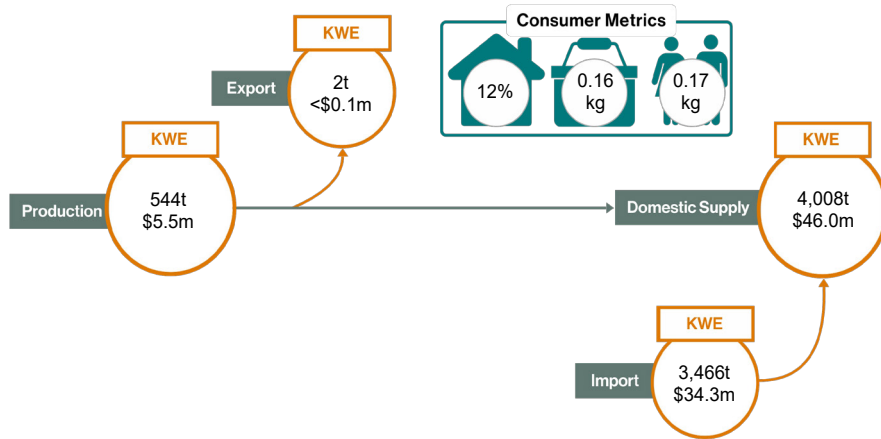
Source: CAI



Hazelnuts

Hazelnuts Overview

HAZELNUTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: Hazelnuts Growers of Australia (HGA); AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$5.5m

544t (KWE) produced and valued at \$5.5m.

CONSUMER METRICS



12% of Australian households purchased hazelnuts, buying an average of 162g per shopping trip.

PER CAPITA CONSUMPTION



0.17kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (KWE t)	494	580	+17%	544	-6%
Production (\$m)	\$5.2	\$6.4	+22%	\$5.5	-14%
Production area (Ha)	600	600	-	-	-
Export Volume (KWE t)	2	38	>100%	2	-96%
Export Value (\$m)	< \$0.1	\$0.5	>100%	< \$0.1	-94%
Import Volume (KWE t)	3,170	2,773	-13%	3,466	+25%
Import Value (\$m)	\$32.5	\$30.1	-7%	\$34.3	+14%
Domestic Supply (KWE t)	3,662	3,315	-9%	4,008	+21%
Domestic Supply Wholesale Value (\$m)	\$44.2	\$41.7	-6%	\$46.0	+10%
Domestic Supply per Capita (kg)	0.16	0.15	-11%	0.17	+14%

Note : The production area remains unchanged as the latest data is not yet available.

Sources: Hazelnuts Growers of Australia (HGA); AC; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Hazelnut Production

MAJOR PRODUCTION AREAS



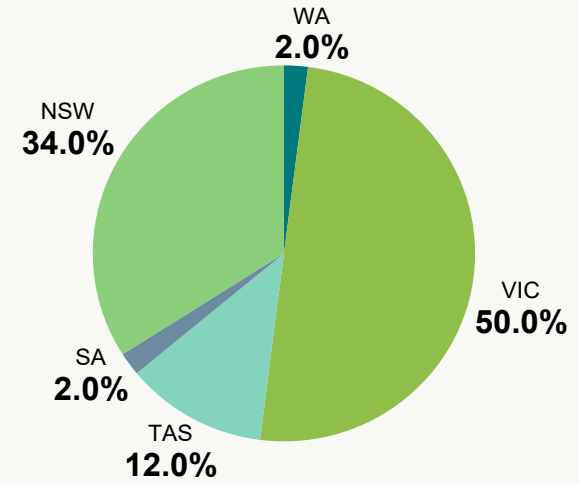
Source: HGA

Hazelnuts are grown in the temperate areas of South-Eastern Australia, with production occurring in Victoria and New South Wales. The majority of hazelnuts are cracked and sold in kernel form.

HARVEST WINDOW



2023/24 HAZELNUT PRODUCTION BY STATE



Source: HGA

2023/24 HAZELNUT HARVEST SEASON BY STATE (KERNEL EQUIVALENT)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	272								Harvest	End of Harvest			
New South Wales	185								Harvest	End of Harvest			
Tasmania	65								Harvest	End of Harvest			
Western Australia	11								Harvest	End of Harvest			
South Australia	11								Harvest	End of Harvest			

Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: HGA

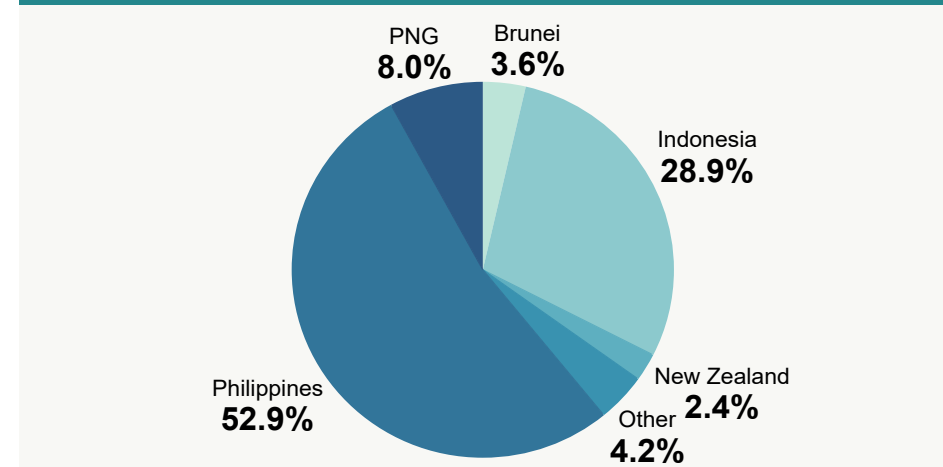
Hazelnut International Trade

HAZELNUT INTERNATIONAL TRADE

Australia is a net importer of hazelnuts, with the majority of imports being in kernel form. For the year ending June 2024, Australia exported **one tonne** of kernel hazelnuts and **one tonne** of in-shell hazelnuts, while importing **3,463 tonnes** of kernel hazelnuts and **seven tonnes** of in-shell hazelnuts. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes. The majority of imports are classified by their country of origin.



HAZELNUT EXPORTS (IN-SHELL AND KERNEL)



Source: GTA/TDM

For the year ending June 2024, **52.9%** of exported hazelnuts were sent to **Philippines**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	< 0.5	74	1	Philippines	1	2	1
Queensland	-	-	< 0.5	Indonesia	1	1	1
New South Wales	< 0.5	1	< 0.5	PNG	-	< 0.5	< 0.5
South Australia	-	-	< 0.5	Brunei	< 0.5	< 0.5	< 0.5
Other	2	4	1	New Zealand	< 0.5	9	< 0.5
TOTAL	2	78	2	Other	1	66	< 0.5
				TOTAL	2	78	2

HAZELNUT IMPORTS (IN-SHELL AND KERNEL)

Imports by Country (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	2,230	1,955	2,697	Turkey	3,136	2,638	3,242
Victoria	728	643	445	US	32	90	193
Queensland	213	176	328	Canada	-	-	27
Western Australia	3	2	< 0.5	Bhutan	-	-	7
Other	< 0.5	-	< 0.5	Italy	< 0.5	-	1
TOTAL	3,173	2,775	3,470	Other	4	47	-
				TOTAL	3,173	2,775	3,470

Source: GTA/TDM

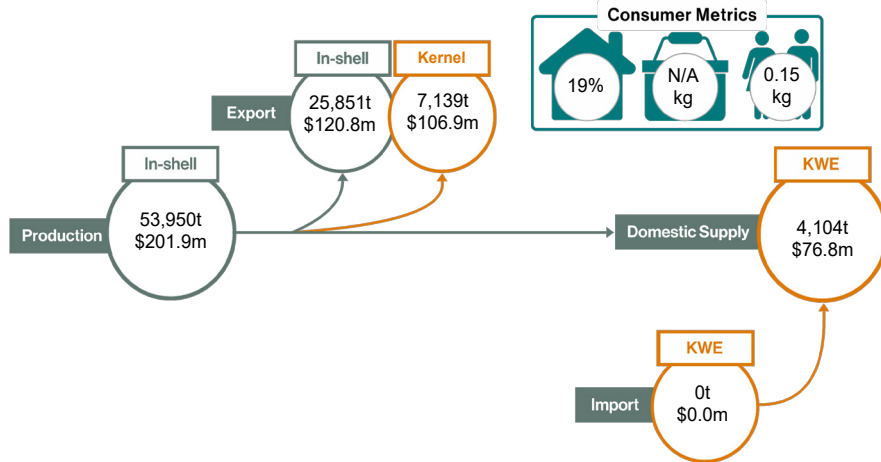
Macadamias



Macadamia Overview

MACADAMIA SUPPLY CHAIN – 2024

Note : Due to the nature of macadamia production and processing, the THRUchain approach has not been applied. Macadamias are reported in In-Shell (IS) and relate to the 2024 season.



Sources: ABS; AC; Australia Macadamia Society (AMS); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$201.9m

53,950t (IS) at 3.5% moisture
(57,850t (IS) at 10% moisture)
produced and valued at \$201.9m.

CONSUMER METRICS



19%

19% of Australian households purchased macadamias.

PER CAPITA CONSUMPTION

0.15kg



in 2024 based on the volume supplied.

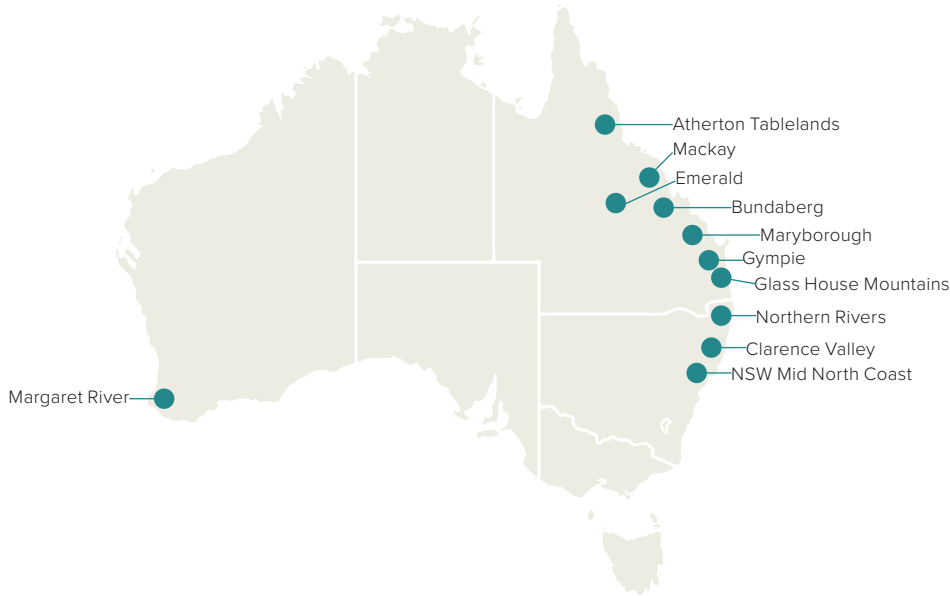
	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (IS t)	52,824	48,400	-8%	53,950	+11%
Production (\$m)	\$203.0	\$104.0	-49%	\$201.9	+94%
Production area (Ha)	38,477	40,321	+5%	41,704	+3%
Export Volume (KWE t)	16,093	11,669	-27%	15,670	+34%
Export Value (\$m)	\$296.6	\$146.4	-51%	\$227.7	+55%
Import Volume (t)	-	-	-	-	-
Import Value (\$m)	\$-	\$-	-	\$-	-
Domestic Supply (KWE t)	3,200	3,751	+17%	4,104	+9%
Domestic Supply Wholesale Value (\$m)	\$74.5	\$64.3	-14%	\$76.8	+20%
Domestic Supply per Capita (kg)	0.12	0.14	+16%	0.15	+6%

Note : This category has had an update on previous editions to ensure up-to-date figures are presented. Trade totals are now calculated from March to February. The production value is an estimated figure based on interim farm gate price and sound kernel recovery, and will be updated at the end of the season.

Sources: ABS; AC; Australian Macadamia Society (AMS); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Macadamia Production

MAJOR PRODUCTION AREAS



Source: AMS

The macadamia industry has a strong export market focus, over 75% of Australian grown macadamias are exported. Macadamia production occurs predominantly in Bundaberg and Northern NSW regions.

PRODUCTION AREA



41,704
Ha

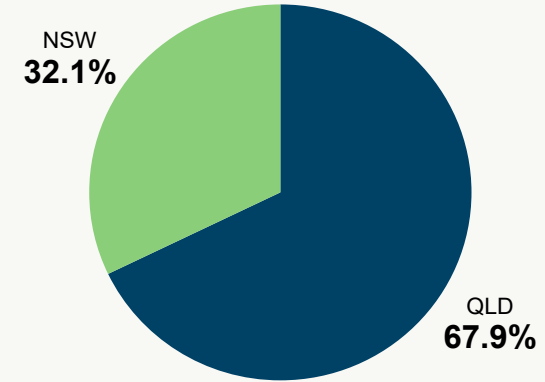
* as at June 2024

HARVEST WINDOW



Feb-Sep

2024 MACADAMIA PRODUCTION BY STATE



Source: AMS

2024 MACADAMIA HARVEST SEASON BY STATE (IN-SHELL)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	36,612	Harvest	End of Harvest	None	None	None	None	None	Harvest	Harvest	Harvest	Harvest	Harvest
New South Wales	17,329	Harvest	Harvest	End of Harvest	None	None	None	None	None	Harvest	Harvest	Harvest	Harvest

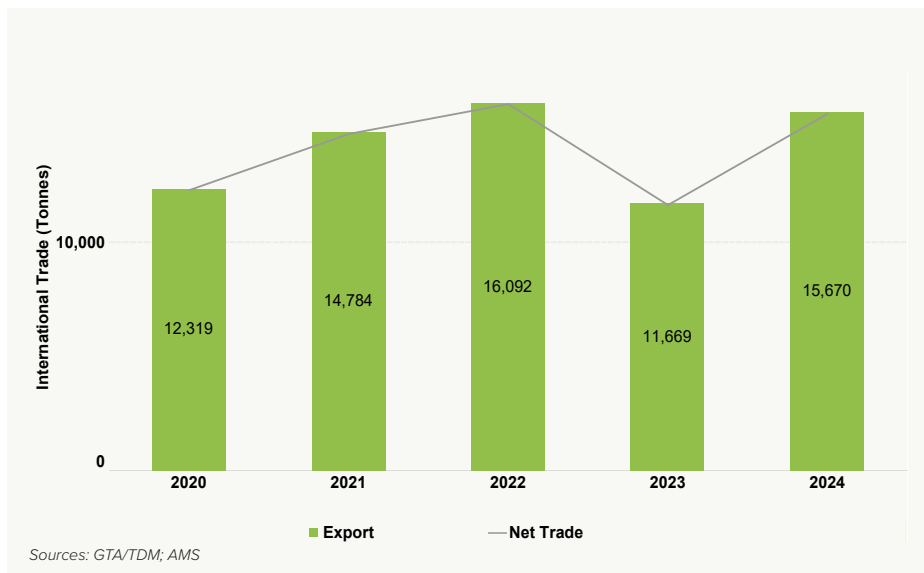
Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: AMS

Macadamias International Trade

MACADAMIA INTERNATIONAL TRADE

Australia exported **25,851 tonnes** of macadamia in-shell and **7,139 tonnes** of macadamia kernel. The totals are calculated on the production year from March to February. The exports over the last five years are profiled in the graph below and all information is provided in KWE.



MACADAMIAS EXPORTS (KERNEL EQUIVALENT)

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
	2022	2023	2024		2022	2023	2024
Queensland	7,054	6,912	-	China	7,258	2,608	-
New South Wales	2,427	1,649	-	Vietnam	3,146	3,455	-
South Australia	1	3	-	Japan	1,735	1,421	-
Victoria	22	3	-	Sth. Korea	972	1,416	-
Other	6,590	3,102	-	US	1,044	877	-
TOTAL	16,093	11,669	15,670	Other	1,937	1,891	-
				TOTAL	16,093	11,669	15,670

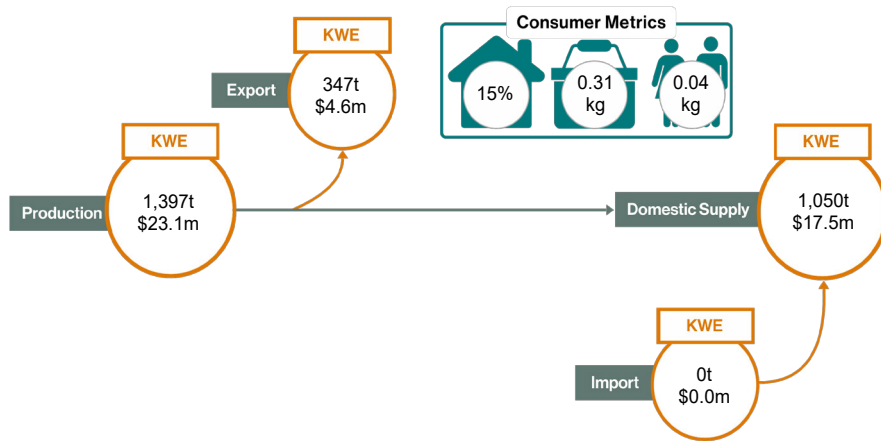
Source: GTA/TDM; AMS

Pecan



Pecan Overview

PECAN SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: AC, Australian Pecan Growers Association (APGA); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$23.1m

1,397t (KWE) produced and valued at \$23.1m.

CONSUMER METRICS



15% of Australian households purchased pecans, buying an average of 310g per shopping trip.

PER CAPITA CONSUMPTION



0.04kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (KWE t)	1,620	1,425	-12%	1,397	-2%
Production (\$m)	\$28.5	\$24.9	-13%	\$23.1	-7%
Export Volume (KWE t)	712	372	-48%	347	-7%
Export Value (\$m)	\$11.4	\$4.9	-57%	\$4.6	-5%
Import Volume (KWE t)	-	-	-	-	-
Import Value (\$m)	\$-	\$-	-	\$-	-
Domestic Supply (KWE t)	908	1,053	+16%	1,050	>-1%
Domestic Supply Wholesale Value (\$m)	\$17.2	\$18.5	+8%	\$17.5	-5%
Domestic Supply per Capita (kg)	0.04	0.04	+13%	0.04	-11%

Note : This category has been updated to reflect revised data for previous years.

Sources: AC, Australian Pecan Growers Association (APGA); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Pecan Production

MAJOR PRODUCTION AREAS



Source: APGA

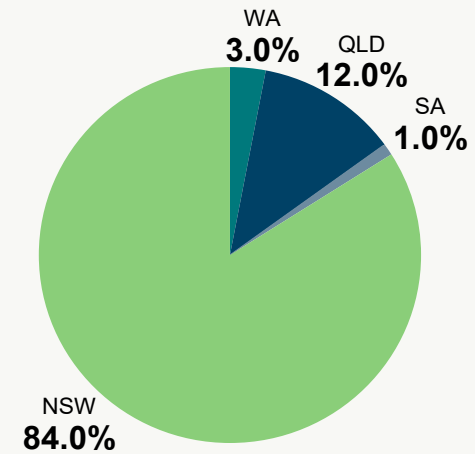
Pecan production is centered in Northern New South Wales and South-Eastern Queensland. The majority of pecans are sold domestically in kernel form, however there is a small export market.

HARVEST WINDOW



Apr-Jul

2023/24 PECAN PRODUCTION BY STATE



Source: APGA

2023/24 PECAN HARVEST SEASON BY STATE (KERNEL EQUIVALENT)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,173	Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest
Queensland	168	Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest
Western Australia	42	Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest
South Australia	14	Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest

Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: APGA

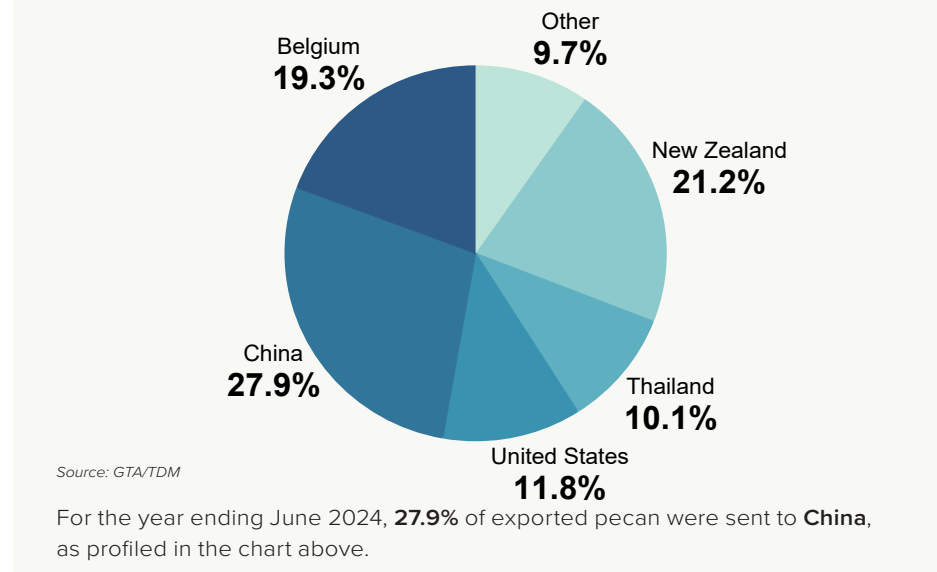
Pecan International Trade

PECAN INTERNATIONAL TRADE

Australia is a net exporter of pecans, with the majority of exports being in in-shell form. For the year ending June 2024, Australia exported **177 tonnes** of in-shell pecans (42% of pecan exports) and **249 tonnes** of kernel pecans (58% of exports). The exports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



PECAN EXPORTS (IN-SHELL AND KERNEL)



Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
Queensland	141	154	318
New South Wales	543	204	21
Victoria	27	12	6
South Australia	0	0	< 0.5
Western Australia	0	< 0.5	< 0.5
Other	1	2	1
TOTAL	711	372	346

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
China	0	0	97
New Zealand	63	75	74
Belgium	60	71	67
US	214	108	41
Thailand	14	9	35
Other	360	108	33
TOTAL	711	372	346

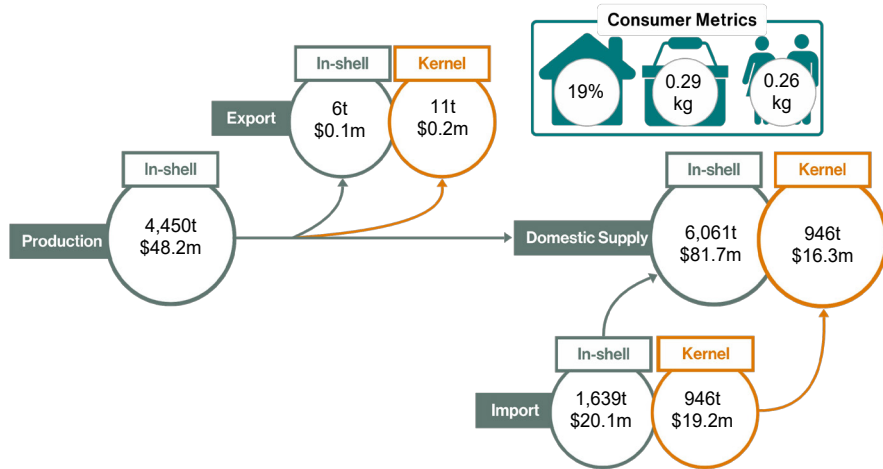
Source: GTA/TDM



Pistachio

Pistachio Overview

PISTACHIO SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: AC, CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$48.2m

4,450t (IS) produced and valued at \$48.2m.

CONSUMER METRICS



19%

19% of Australian households purchased pistachios, buying an average of **290g** per shopping trip.

PER CAPITA CONSUMPTION



0.26kg

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (IS t)	3,600	1,400	-61%	4,450	>100%
Production (\$m)	\$37.5	\$15.9	-58%	\$48.2	>100%
Production area (Ha)	2,250	2,250			
Export Volume (t)	328	77	-76%	18	-77%
Export Value (\$m)	\$4.1	\$1.5	-64%	\$0.3	-77%
Import Volume (t)	1,555	1,746	+12%	2,585	+48%
Import Value (\$m)	\$24.6	\$32.9	+34%	\$39.3	+19%
Domestic Supply (t)	6,326	4,606	-27%	7,006	+52%
Domestic Supply Wholesale Value (\$m)	\$93.5	\$70.1	-25%	\$98.0	+40%
Domestic Supply per Capita (kg)	0.24	0.18	-28%	0.26	+47%

Note : Trade and domestic supply data for pistachios is the sum of kernel and in-shell volumes.

The production area remains unchanged as the latest data is not yet available.

Sources: AC, CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

Pistachio Production

MAJOR PRODUCTION AREAS



Source: ANIC; (Freshlogic Analysis)

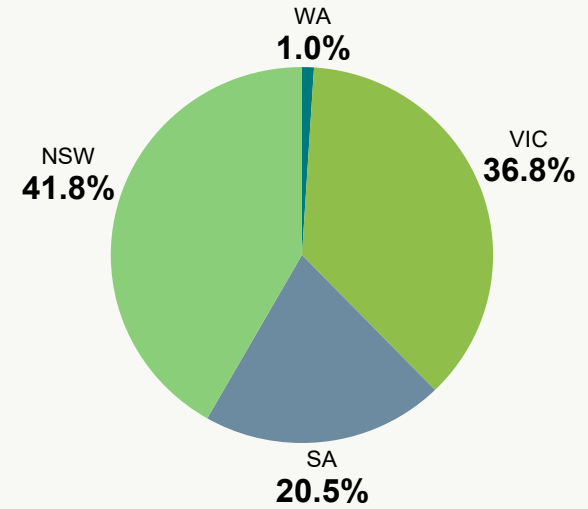
Pistachios are grown in the south of Australia, with the majority of production occurring in New South Wales and Victoria.

HARVEST WINDOW



Feb-Apr

2023/24 PISTACHIO PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2023/24 PISTACHIO HARVEST SEASON BY STATE (IN-SHELL)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,858								Harvest	Harvest	End of Harvest		
Victoria	1,635								Harvest	Harvest	End of Harvest		
South Australia	912								Harvest	Harvest	End of Harvest		
Western Australia	45								Harvest	Harvest	End of Harvest		

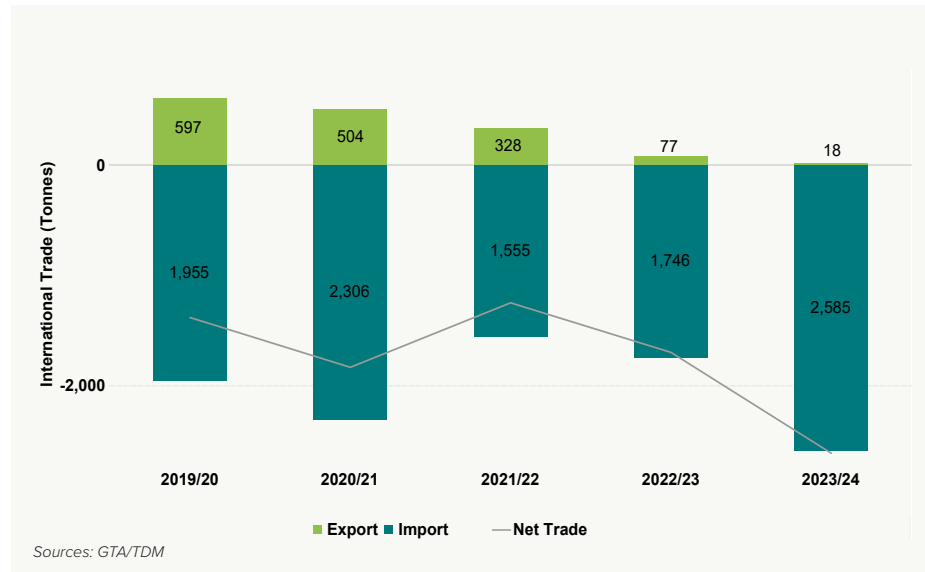
Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: (Freshlogic Analysis)

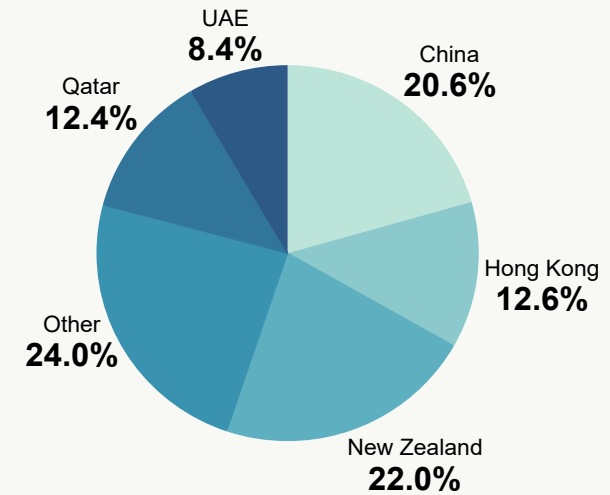
Pistachio International Trade

PISTACHIO INTERNATIONAL TRADE

Australia is a net importer of pistachios, with the majority of imports being in in-shell form. For the year ending June 2024, Australia exported **six tonnes** of in-shell pistachios (**33%** of pistachio exports) and **11 tonnes** of kernel pistachios (**67%** of pistachio exports). Australia imported **1,639 tonnes** of in-shell pistachios (**63%** of pistachio imports) and **946 tonnes** of kernel pistachios (**37%** of pistachio imports). The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



PISTACHIO EXPORTS (IN-SHELL AND KERNEL)



Source: GTA/TDM

For the year ending June 2024, **22.0%** of exported pistachios were sent to **New Zealand**, as profiled in the chart above.

Year Ending June	2022	2023	2024
South Australia	1	1	5
Victoria	320	5	4
New South Wales	4	3	2
Queensland	-	13	1
Other	4	55	5
TOTAL	328	77	18

Year Ending June	2022	2023	2024
New Zealand	8	9	4
China	313	-	4
Hong Kong	2	28	2
Qatar	1	2	2
UAE	1	11	1
Other	4	27	4
TOTAL	328	77	18

PISTACHIO IMPORTS (IN-SHELL AND KERNEL)

Year Ending June	2022	2023	2024
New South Wales	557	435	1,631
Victoria	488	867	447
South Australia	398	306	343
Queensland	109	137	163
Western Australia	3	-	1
TOTAL	1,555	1,746	2,585

Year Ending June	2022	2023	2024
US	1,103	1,000	1,714
China	164	410	524
Vietnam	84	142	215
Iran	107	111	91
Turkey	81	57	34
Other	15	25	8
TOTAL	1,555	1,746	2,585

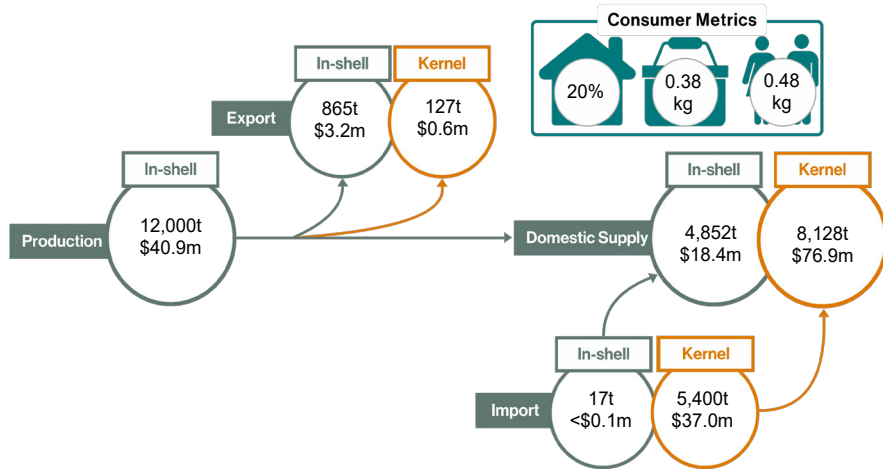
Source: GTA/TDM

Walnuts



Walnuts Overview

WALNUTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: AC, CFVIWA; GTA/TDM; Australian Walnut Industry Association (AWIA); MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION



\$40.9m

12,000t (IS) produced and valued at \$40.9m.

CONSUMER METRICS



20%

20% of Australian households purchased walnuts, buying an average of **380g** per shopping trip.

PER CAPITA CONSUMPTION

0.48kg 

in 2023/24 based on the volume supplied.

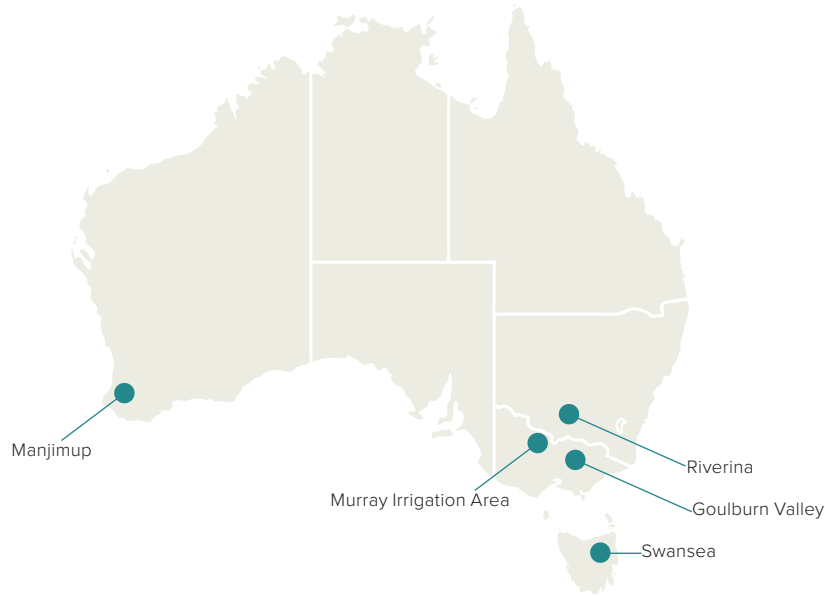
YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (IS t)	14,341	8,000	-44%	12,000	+50%
Production (\$m)	\$49.4	\$20.3	-59%	\$40.9	>100%
Production area (Ha)	4,022	4,300	+7%	-	-
Export Volume (t)	4,359	4,373	<1%	992	-77%
Export Value (\$m)	\$17.2	\$11.9	-31%	\$3.8	-68%
Import Volume (t)	4,969	4,245	-15%	5,417	+28%
Import Value (\$m)	\$39.8	\$31.5	-21%	\$37.1	+18%
Domestic Supply (t)	10,639	5,576	-48%	12,981	>100%
Domestic Supply Wholesale Value (\$m)	\$97.0	\$28.9	-70%	\$95.3	>100%
Domestic Supply per Capita (kg)	0.41	0.21	-48%	0.48	>100%

Note : Trade and domestic supply data for walnuts is the sum of kernel and in-shell volumes.

Sources: AC, CFVIWA; GTA/TDM; Australian Walnut Industry Association (AWIA); MP & DD (Freshlogic Analysis)

Walnuts Production

MAJOR PRODUCTION AREAS



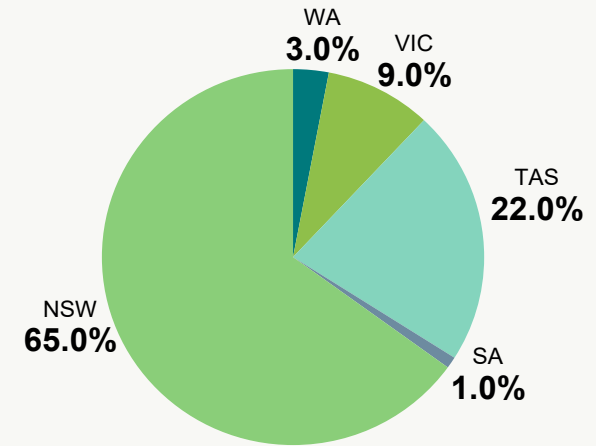
Source: *Wala*

Walnuts are grown across Australia, with the majority of production occurring in New South Wales. Walnuts have a strong export focus, with moderate volume of the Australian production being sold locally in-shell.

HARVEST WINDOW



2023/24 WALNUTS PRODUCTION BY STATE



Source: *Wala*

2023/24 WALNUTS HARVEST SEASON BY STATE (IN-SHELL)

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	7,800	Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	Harvest
Tasmania	2,640	End of Harvest	End of Harvest	None	None	None	None	None	None	None	Harvest	Harvest	Harvest
Victoria	1,080	End of Harvest	None	None	None	None	None	None	None	None	None	Harvest	Harvest
Western Australia	360	End of Harvest	None	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest
South Australia	120	None	None	None	None	None	None	None	None	Harvest	Harvest	End of Harvest	None

Availability legend: ■ Harvest ■ End of Harvest ■ None

Source: *(Freshlogic Analysis)*

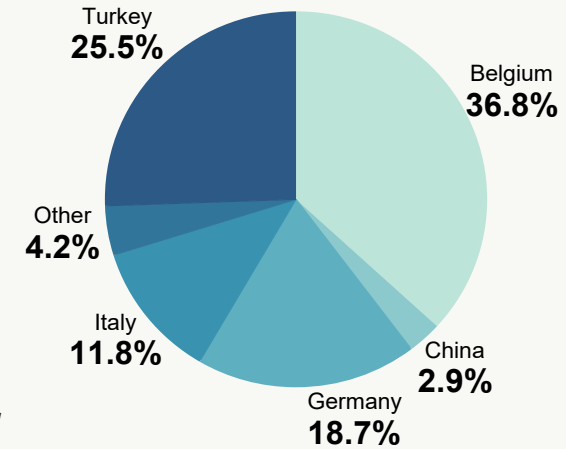
Walnuts International Trade

WALNUTS INTERNATIONAL TRADE

Australia has traditionally been a net importer of walnuts. For the year ending June 2024, Australia exported **865 tonnes** of in-shell walnuts (**87%** of walnuts exports) and **127 tonnes** of kernel walnuts (**13%** of exports), while importing **17 tonnes** of in-shell walnuts (**<one%** of walnut import) and **5,400 tonnes** of kernel walnuts (**100%** of imports). The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



WALNUTS EXPORTS (IN-SHELL AND KERNEL)



Source: GTA/TDM

For the year ending June 2024, **36.8%** of exported walnuts were sent to **Belgium**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
New South Wales	4,282	4,322	980
South Australia	-	-	10
Victoria	73	45	1
Queensland	1	< 0.5	< 0.5
Other	3	5	2
TOTAL	4,359	4,373	992

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Belgium	1,072	601	365
Turkey	815	2,307	253
Germany	712	421	186
Italy	1,011	557	117
China	15	14	29
Other	735	474	42
TOTAL	4,359	4,373	992

WALNUTS IMPORTS (IN-SHELL AND KERNEL)

Imports by State Destination (Tonnes)			
Year Ending June	2022	2023	2024
Victoria	3,067	2,566	3,279
New South Wales	1,225	1,170	1,549
Queensland	427	396	384
South Australia	181	45	115
Western Australia	69	68	91
Other	< 0.5	< 0.5	-
TOTAL	4,969	4,245	5,417

Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024
US	3,796	3,462	4,578
Vietnam	718	462	535
Chile	234	184	160
China	205	67	124
South Africa	-	-	19
Other	16	70	< 0.5
TOTAL	4,969	4,245	5,417

Source: GTA/TDM