



Australia Walnut Industry Update

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The Australian Walnut Industry Association

- Includes all industry and major growers
- Peak Industry Body to ANIC, Gov't, Nuts4Life
- Education – farm walks and symposia
- Promotion and marketing
- Funds and participates in research



The Walnut industry in Australia

- Very young industry, >90% of plantings planted in the last 15 years
- One grower account for >80% of production
- Plantings to expected to grow by 20% in the next 5 years
- More processing options coming to the market as the industry grows
- Australia ranks 20th largest walnut producer in the world according to FAO statistics, was 38th in 2010

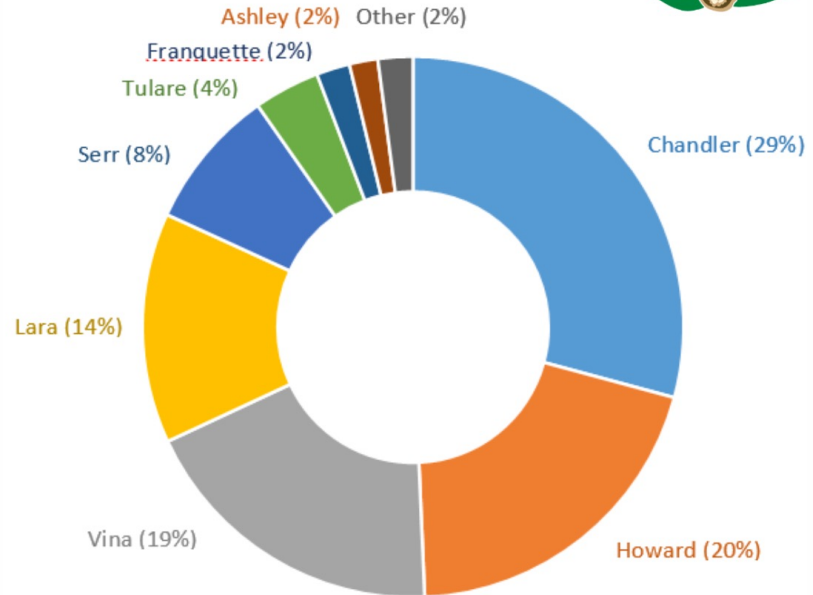
Walnut production areas

- Cool-temperate to semi-arid regions
- Wider geographic distribution than some other nut crops
- Production largely in SE Australia
- 4,800 ha of bearing orchards (2021)
- NSW: 74% of total plantings VIC: 13%
Tasmania: 11%



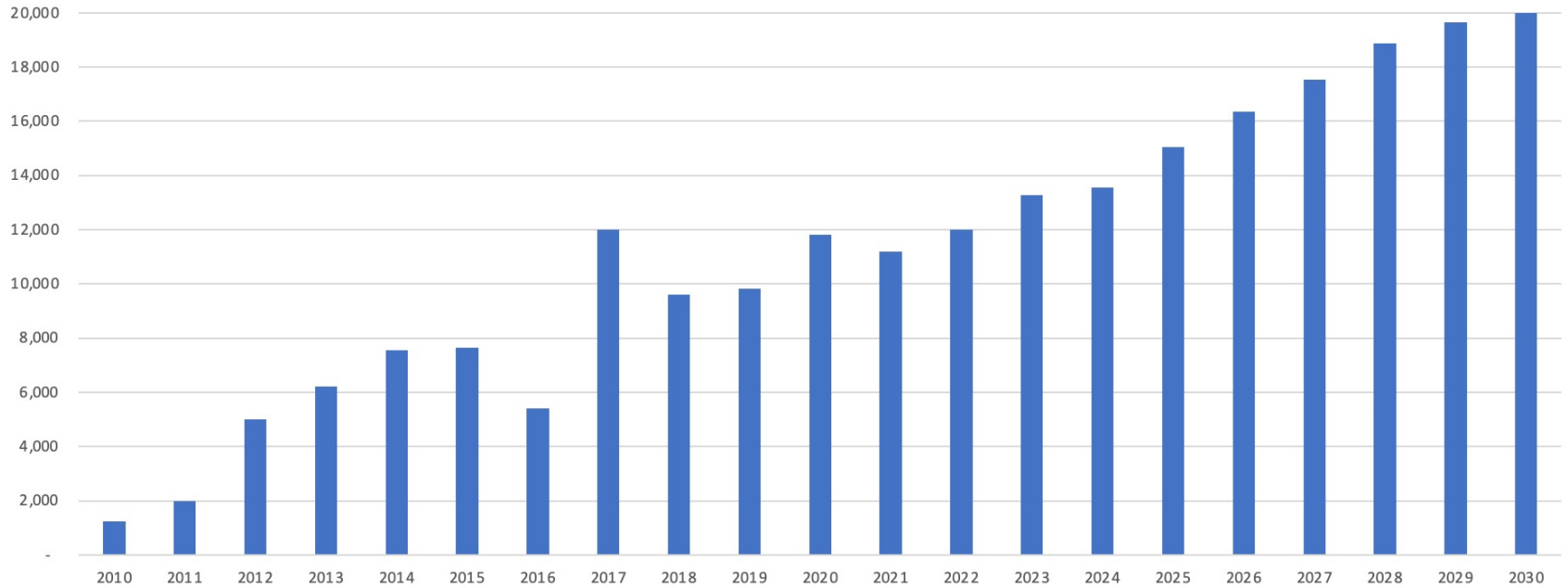
Plantings

- Most plantings based on Californian cultivars and rootstocks, no breeding program in Australia
- Multi variety industry compared to international competitors focus on single variety
- Preferred for cultivar selection:
 - Lateral bud fruitfulness, nut quality (size and colour)
 - Leafing and bloom date
- Late-leafing cultivars (Howard, Chandler) in 1/2 plantings



Crop volume

Australian Walnut Production in MT



Crop value

	2010	2018	2021	2030 (estimate)
Are planted (ha)	2,800	3,600	4,800	5,400
Production (MT)	3,500	11,000	12,000	20,000
Farm gate value	\$13m	\$35m	\$42m	\$95m

Import & Export

- Australia historically has been a net importer of walnuts
- FY21 4,800MT imported and 5,700MT exported
- Majority of import from US as kernel product
- Majority of export to Europe as inshell product

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	3,903	3,506	3,636	Turkey	-	229	1,844
Vietnam	210	694	685	Italy	1,378	671	1,632
Chile	142	156	234	Belgium	563	519	1,155
China	144	161	193	Germany	370	485	631
Turkey	-	-	20	France	22	220	198
Other	96	92	19	Other	1,055	912	240
TOTAL	4,494	4,609	4,787	TOTAL	3,389	3,036	5,699

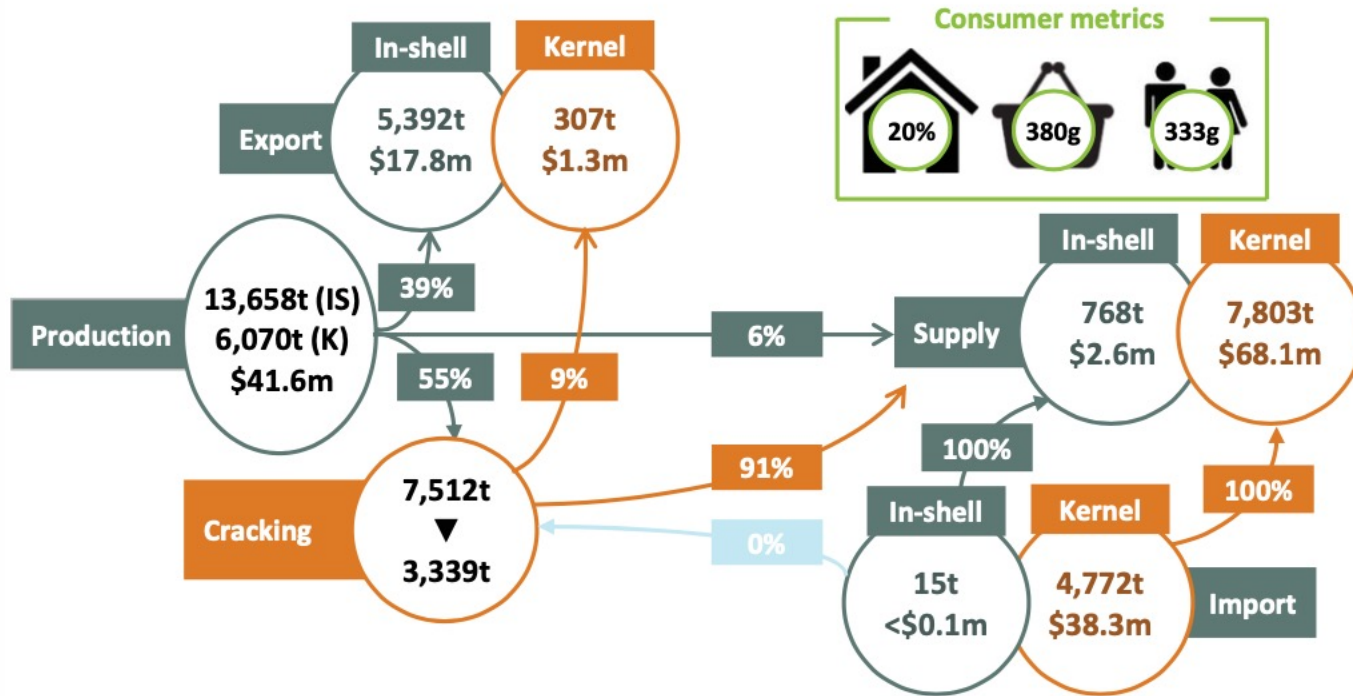
Source: GTA

Australia's export success

- Reliable supply of premium quality walnuts into Northern hemisphere markets in their off- season
- We produce some of the best quality walnuts using world-class processing systems
- This gives consumers confidence that Australian walnuts are safe and reliable



Supply chain



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

Why invest in Australian walnuts?

- Absence of most walnut pests and diseases in Australia
- Walnuts are wind pollinated
- Continuing strong global demand for walnuts. Counter season production
- Solid & sustained growth in consumption, driven by increasing awareness of their health benefits



Questions

